Mercury™ IT Governance Center

Configuring the Mercury IT Governance Dashboard

Version 5.5.0

MERCURY INTERACTIVE

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Introduction

Intended for large and complex environments, the Mercury IT Governance Dashboard™ provides 360° visibility and control over technology-based initiatives and IT operational tasks. Configurable, role-based visual displays called “Portlets” provide relevant summary information and highlight exception conditions in Mercury IT Governance Center managed initiatives.

The Dashboard is beneficial to a wide range of users in your IT organization. For example, developers can use the Dashboard to view all of their own Action Items while end-users can consult their own Dashboards to see the status of the Requests they have submitted.

About This Document

This document provides instructions for configuring custom Portlets, maintaining standard and custom Portlets, and distributing Modules. Each chapter covers a particular topic:

Key Concepts	Presents an overview of terms and concepts found in this guide.
Creating Custom Portlets	Describes building and configuring a custom Portlet.
Enabling and Maintaining Portlets	Describes enabling and maintaining Portlets and configuring Portlet displays.
Configuring Modules	Details the concepts and processes associated with creating Modules, which are used to distribute Dashboard pages and Portlets to the user base.

Distributing Modules	Details the processes associated with distributing and publishing Modules.
System Portlets	Lists the Mercury IT Governance Center Portlets.
Example: Creating a Custom Portlet	Provides a step-by-step example of how to configure a custom Portlet.

Intended Audience

The intended audience for this document includes:

- Business or technical users who configure and maintain custom Portlets.
- Business or technical users who configure and maintain Dashboard distribution Modules, pages and Portlets.
- Business or technical users who publish and distribute Dashboard distribution Modules, pages and Portlets.

Document Conventions

Table 1-1 lists the types of conventions used in this document.

Table 1-1. Document conventions

Convention	Description	Example
Button, menu, tabs	Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold.	**Apply** button
Fields, Windows, Pages	Names of windows, fields, and pages are shown as displayed.	New Request window
`Code`	Code input and output are shown as displayed.	`CauchoConfigFile` `C:/`*`ITG_Home`*`/conf/resin.conf`
Link	Linked URLs, filenames, and cross references are shown as blue italicized text.	*www.merc-int.com*

Table 1-1. Document conventions [continued]

Convention	Description	Example
Variable	Variables are shown as italicized text.	*ITG_Home*/bin directory
Note	Used to identify note boxes that contain additional information.	Note
Caution	Used to identify caution boxes that contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data.	Caution
Example	Used to identify example boxes that contain examples of related procedure.	Example

Additional Resources

Mercury Interactive provides the following additional resources to help successfully use the Mercury IT Governance Center:

- *Related Documentation*
- *Customer Support*
- *Education Services*

Related Documentation

The Library includes additional documents related to the topics discussed in this guide. Access the Library through the Mercury ITG Center online help.

Using the Dashboard	This document details how to navigate through the Mercury IT Governance Dashboard.

Using the Workbench	This document explains how to navigate through the Mercury IT Governance Workbench interface.

Customer Support

Customer support and downloads for the Mercury ITG Center and additional product information can be accessed from the Mercury Interactive Support Web site at *http://support.mercuryinteractive.com*.

Education Services

Mercury Interactive provides a complete training curriculum to help you achieve optimal results using the Mercury IT Governance Center. For more information, visit the Education Services Web site at *http://www.merc-training.com/main/ITG*.

Chapter
2
Key Concepts

This chapter details key concepts and definitions to better understand and configure the Mercury IT Governance Dashboard.

This chapter covers the following topics:

Modules

A Module is one or more Dashboard pages and Portlets personalized to a specific set of requirements. These requirements can reflect a unique Project, Group, Function, Package or Task. Only an application administrator (or user with the correct Access Grant permissions) can create and configure a Module. Once created and configured, a Module can be published or distributed to one or many user Dashboards. *Figure 2-1* shows the Configure Modules page.

Published Modules are tracked by the system and can only be removed from a user's Dashboard by the application administrator (or user with the correct

Access Grant permissions). Additionally, the Dashboard pages and Portlets of a published Module cannot be edited or deleted by the owner of the Dashboard.

Distributed Modules are not tracked by the system. The Dashboard pages and Portlets of a distributed Module can be edited or deleted by the owner of the Dashboard.

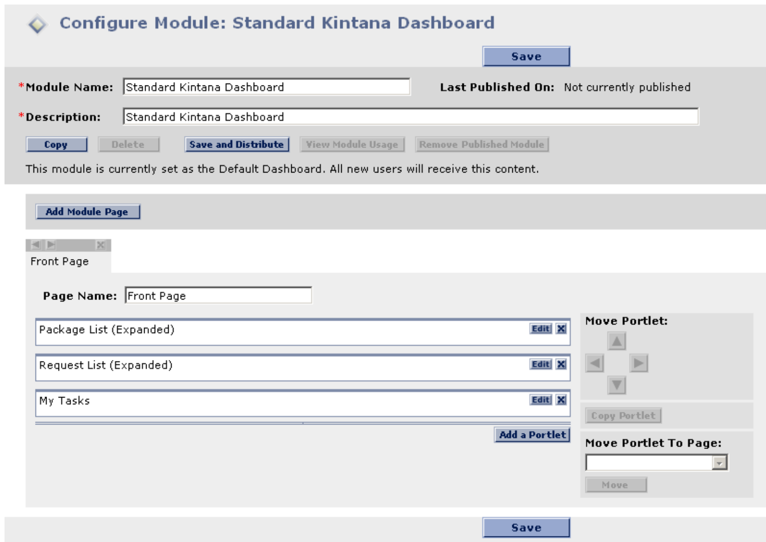


Figure 2-1 Configure Module page

Publishing Modules

Publishing is a process of disseminating Modules to one or many user Dashboards at one time. Publishing is a regimented approach to disseminating Modules. Published Modules are tracked by the system and can only be removed from a user's Dashboard by the application administrator (or user with the correct Access Grant permissions). Only application administrators can publish a Module. The Dashboard pages and Portlets of a published Module cannot be edited or removed by the owner of the Dashboard. *Figure 2-2* shows the Module Distribution page.

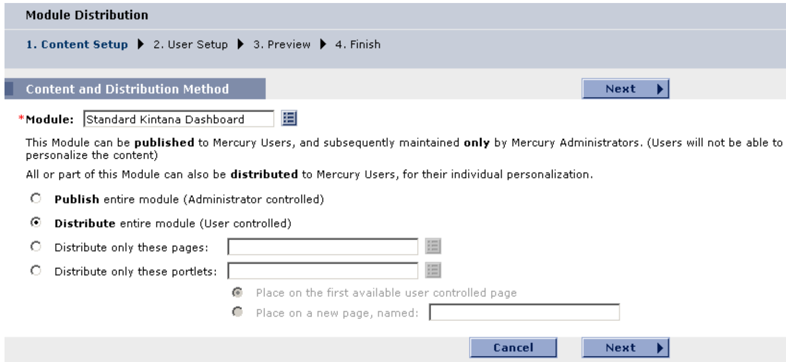


Figure 2-2 Module Distribution page

Distributing Modules

Distributing is a process of disseminating Modules to one or many user Dashboards at one time. Distribution provides a more flexible approach to disseminating Modules than publishing. Distribution supports the dissemination of Modules, Dashboard pages and individual Portlets. Distributed Portlets, Dashboard pages and Modules are not tracked by the system and cannot be removed from a Dashboard by the application administrator. Distributed Portlets and Dashboard pages can be edited by the owner of the Dashboard. *Figure 2-2* shows the Module Distribution page.

Default Dashboard

The default Dashboard page is the first page seen when a user opens the Dashboard for the first time. The default Dashboard allows first-time users quick and easy integration of the Dashboard into their business processes. The default Dashboard can be published or distributed. Published default Dashboard pages cannot be edited or removed by the owner of the Dashboard. Distributed default Dashboard pages can be edited and removed by the owner of the Dashboard.

System Portlets Versus Custom Portlets

System Portlets are the Portlets shipped with the Mercury IT Governance Center. System Portlets are "seeded" in the system and their logic cannot be edited. Advanced users can edit a system Portlet, but only to edit the Portlet's help window and set user permissions for the Portlet. System Portlets cannot be copied or used as a basis for a new custom Portlet. For a list of all system Portlets, see *"System Portlets"* on page 89.

Custom Portlets are created by advanced users using the Mercury IT Governance Workbench. *"Creating Custom Portlets"* on page 13 details the steps required to create a custom Portlet. *"Example: Creating a Custom Portlet"* on page 103 provides a detailed example of how to create a custom Portlet.

Building a Custom Portlet

Custom Portlets are created using the Portlet Workbench. From the Portlet Workbench, an advanced user configures the queries and display parameters of the Portlet, retrieving data from the system through SQL queries. *Figure 2-3* illustrates the Portlet Workbench.

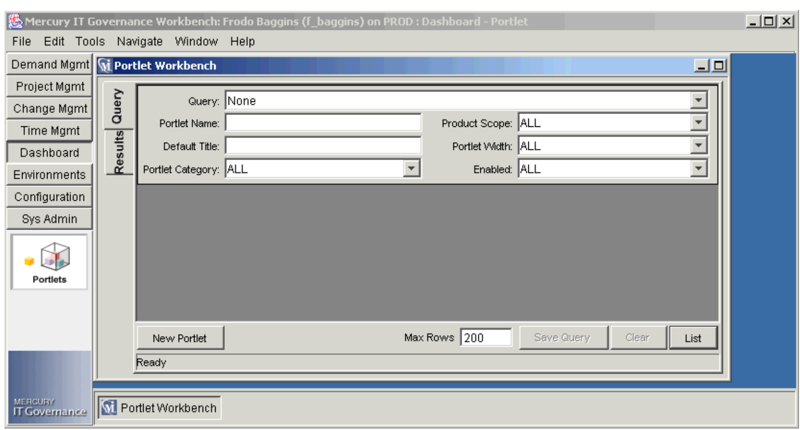


Figure 2-3 Portlet Workbench

Filter Fields

Filter fields appear on a Portlet's edit page. These fields are used by the end user to personalize what data is displayed on a specific Portlet on a specific Dashboard page. For example, on one Dashboard page, the Request List Portlet can be configured to display all Requests and on another Dashboard page the Request List Portlet can be configured to display only closed Requests. *Figure 2-4* illustrates the filter fields of the Request List edit page.

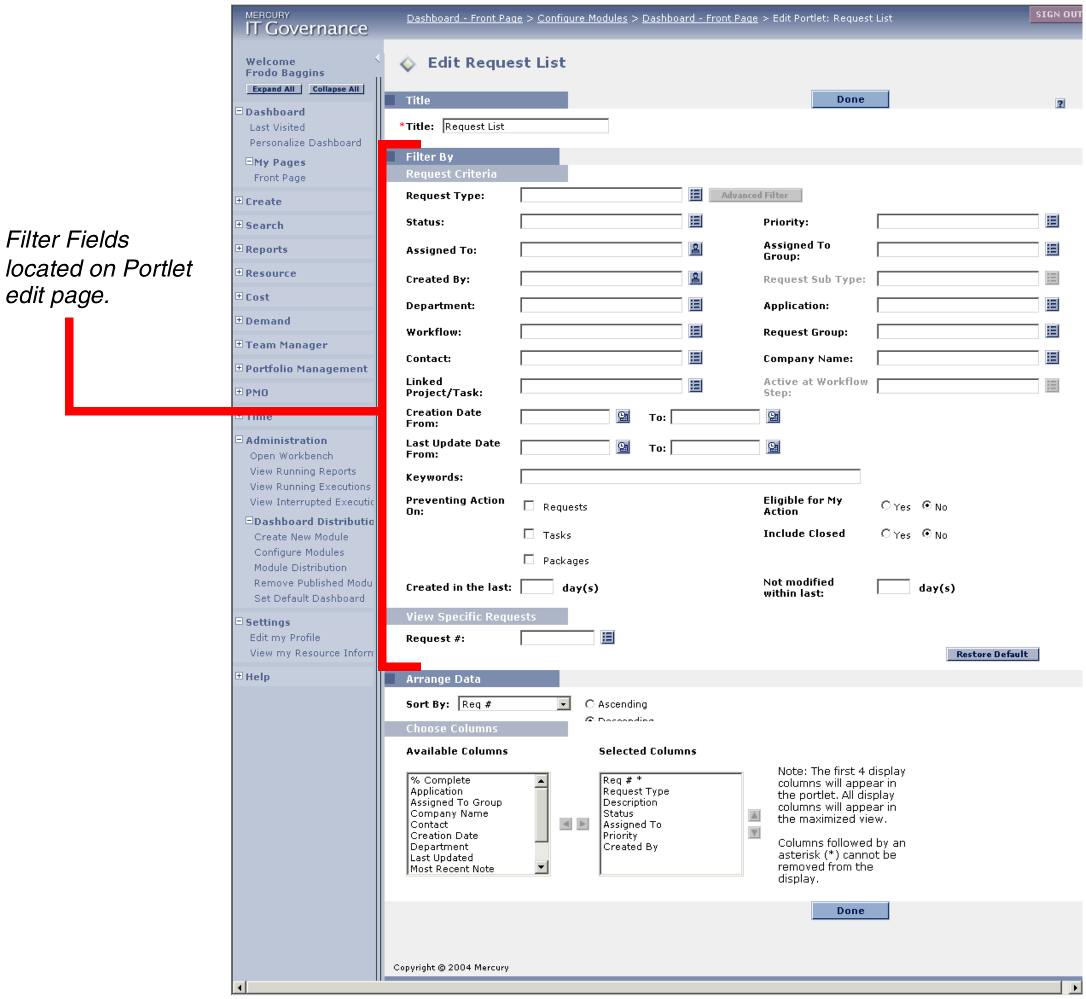


Figure 2-4 Edit Request List page

When constructing a custom Portlet, the advanced user must define the filter fields that appear on the custom Portlet's edit page. Filter fields are defined in the **Filter Fields** tab of the Portlet window. The **Filter Fields** tab is shown in *Figure 2-5*.

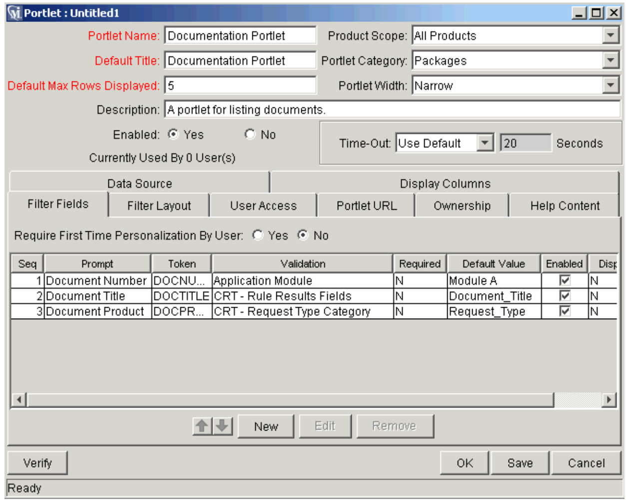


Figure 2-5 Filter Fields tab

Users Who Should Build Custom Portlets

Building custom Portlets involves creating SQL queries that access information from the database. Only advanced users with SQL and Oracle database experience should build and configure custom Portlets.

Portlet Security and Licensing

Portlet access is determined by product licenses assigned to a user. In addition, Portlet access can be restricted through the use of Security Groups and user access restrictions.

Security groups and user access restrictions are configured using the **User Access** tab of the Portlet window. A user who is not a member of a Security Group specified in the **User Access** tab cannot see the Portlet in their list of available Portlets. See *"Portlet Security"* on page 30 for more information. *Figure 2-6* shows the **User Access** tab of the Portlet window.

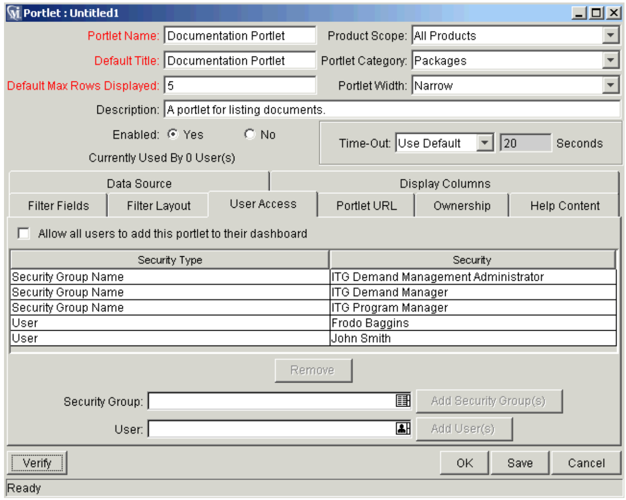


Figure 2-6 User Access tab

Retrieving Data from External Sources

Portlets can display data from any external database accessible from the system. This can be done using the **Select/From** tab of the Query Definition window. Include database links to external sources' tables and/or views in the FROM clause, following standard SQL formats.

Chapter 3

Creating Custom Portlets

The Mercury IT Governance Dashboard provides visibility into real-time Mercury ITG data while work is in progress. This data is presented through Portlets. Portlets are visual displays that act as windows into different aspects of the Mercury ITG data. This chapter discusses how custom Portlets can be created to meet the business needs of an organization.

This chapter covers the following topics:

Note

Knowledge of SQL is required for users who want to create a custom Portlet. For a detailed example procedure of building a Portlet, see *"Example: Creating a Custom Portlet"* on page 103.

Before Building a Custom Portlet

Before building a custom Portlet, determine what data needs to be displayed and decide how to display the data. The following questions might help to determine what data to capture and how to display that data:

- What type of information needs to be captured in this Portlet? For example, is the Request Number, Request Type, Description, Created By User, Assigned User, or Priority required?
- What additional requirements are required? Are any visual indicators needed, such as hyperlinks or Tooltips? For example:
  - o Should any of the fields be hyperlinked so users can click on the links to go to Request Detail pages directly?

  - o Should any of the fields include Tooltips so users see additional information when the mouse moves over the usernames?
  - o Should any of the fields have colorful icons? Some fields have values, such as Red, Yellow and Green. Should these be displayed as colored icons?
- Where is the data located? Which databases and tables contain the data? This information bears most directly on the SQL query that retrieves and displays the data. What is the criteria necessary to link the database tables?
- What possible filter fields would users find most helpful?
- Is a JSP page being built for the Portlet?

Creating a Custom Portlet

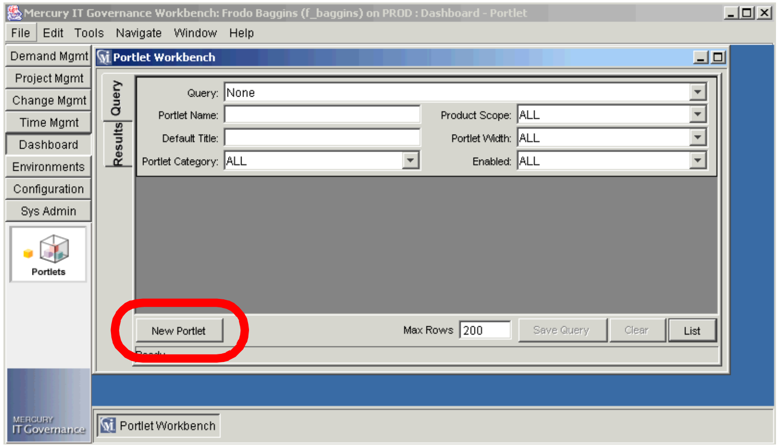
This section covers the following topics:

Assigning a Name to the Custom Portlet

To assign a name to the Portlet:

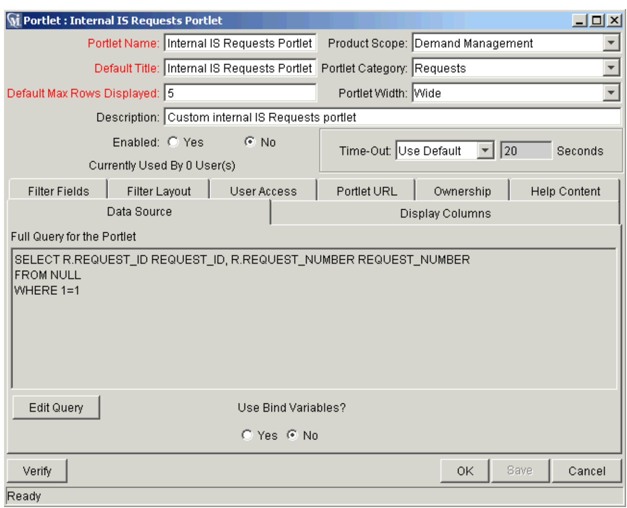
1. From the Workbench, select **Dashboard > Portlets**.

The Portlet Workbench window opens.



2. Click **New Portlet**.

   The Portlet window opens.



3. Enter data into all required fields and any optional fields as listed in *Table 3-1*.

Table 3-1. Portlet General Information fields

Field	Description
Portlet Name	The unique name used to identify a Portlet.

Table 3-1. Portlet General Information fields [continued]

Field	Description
Product Scope	Limits the Portlet to a specific product, such as **Demand Management, Change Management** and **All Products**. Only users with a corresponding license can use the Portlet on their Dashboard. For example, a user with only a Demand Management license cannot add a Project Management Portlet (Portlet with Product Scope=**Project Management**) to their Dashboard.
Default Title	The default title for the Portlet appearing on the Portlet's edit page. This defaults to the Portlet Name during initial definition.
Portlet Category	Application Administrator-defined category to which the Portlet belongs, such as Project Management, Projects or Requests. The values in this field are defined in the following Validation: DSH - Portlet Category.
Default Max Rows Displayed	The default maximum number of rows displayed in the Portlet.
Portlet Width	Sets whether the Portlet is wide (2-column) or narrow (1-column).
Description	A brief description of the Portlet.
Enabled	Sets whether the Portlet is enabled for use.
Currently Used By	Shows how many current users have the Portlet on their Dashboard.
Time-Out	Sets a time-out for the Portlet SQL query. To specify a time-out value for the Portlet, select **Portlet Specific** from the drop down list. Then indicate the number of seconds (in the adjacent field) after which the query will time out.

4. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Building the Query

Portlets use SQL queries to retrieve information from a database or table view. These queries are built from the Query Definition window and assist with the construction of the SQL query. The three tabs are:

- **Select/From**
- **Where/Filter**

- **Group By/Order By**

Figure 3-1 illustrates an example of an SQL query for a Portlet.

```
SELECT R.REQUEST_ID REQUEST_ID,
  R.REQUEST_NUMBER REQUEST_NUMBER,
  R.DESCRIPTION DESCRIPTION,
  R.CREATED_BY_USERNAME CREATED_BY_USERNAME,
  R.ASSIGNED_TO_USERNAME ASSIGNED_TO_USERNAME,
  R.PRIORITY_MEANING PRIORITY,
  RD.VISIBLE_PARAMETER1 PROGRESS,
  R.USER_DATA5 CURRENT_ CONDITION,
  U1.FIRST_NAME || ' ' || U1.LAST_NAME || ', Email: ' ||
U1.EMAIL_ADDRESS ASSIGNED_TO_USER_TOOLTIPS,
  U2.FIRST_NAME || ' ' || U2.LAST_NAME || ', Email: ' ||
U2.EMAIL_ADDRESS CREATED_BY_USER_TOOLTIPS,
FROM  KCRT_REQUEST_DETAILS RD,
        KNTA_USERS U1,
        KNTA_USERS U2,
KCRT_REQUESTS_V R
WHERE R.REQUEST_TYPE_NAME = 'Internal IS Request'
    AND RD.REQUEST_ID = R.REQUEST_ID
   AND R.BATCH_NUMBER = 1
   AND U1.USER_ID (+) = R.ASSIGNED_TO_USER_ID
   AND U2.USER_ID = R.CREATED_BY
   AND (R.ASSIGNED_TO_USER_ID = [SYS.USER_ID]
     OR R.CREATED_BY = [SYS.USER_ID])
```

Configured by Select/From tab

Configured by Where/Filter tab

Note: no Group By/Order By clauses

Figure 3-1 SQL Query Example

To build the query for a Portlet:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

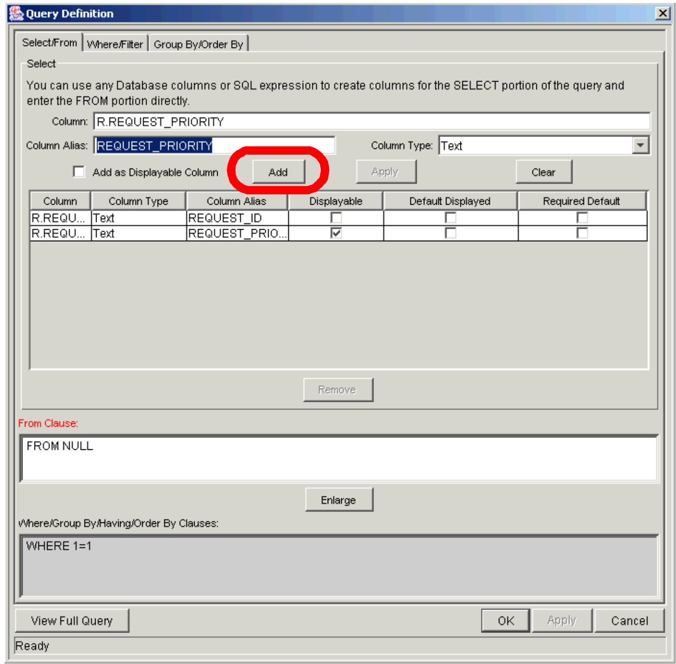
2. Click the **Data Source** tab.

3. Click **Edit Query**.

   The Query Definition window opens.

4. Edit the **Select/From** tab.

   a. In the **Select/From** tab, create a column.



i. Enter data into all required fields and any optional fields as specified in *Table 3-2*.

Table 3-2. Select/From fields

Field	Description
Column	The database column name or custom expression used for the column.
Column Alias	The alias used for the column (useful for Tooltips). This is automatically updated when Column is filled in.
Column Type	The type of column: Text, Number, Summary Condition/Exception, Date, or Percentage Bar.
Add as Display Column	Indicates whether to add this column as a displayed column. Only displayed columns appear on the Dashboard.

ii. Click **Add**.

- If Add as Display Column is unchecked, the column is added to the table and the fields are cleared.

- If Add as Display Column is checked, the Column Definition window opens. See *"Defining the Portlet's Displayable Columns"* on page 22 for more detailed information on defining displayed columns.

b. If required, create additional columns.

   Repeat Step *a* to add more columns.

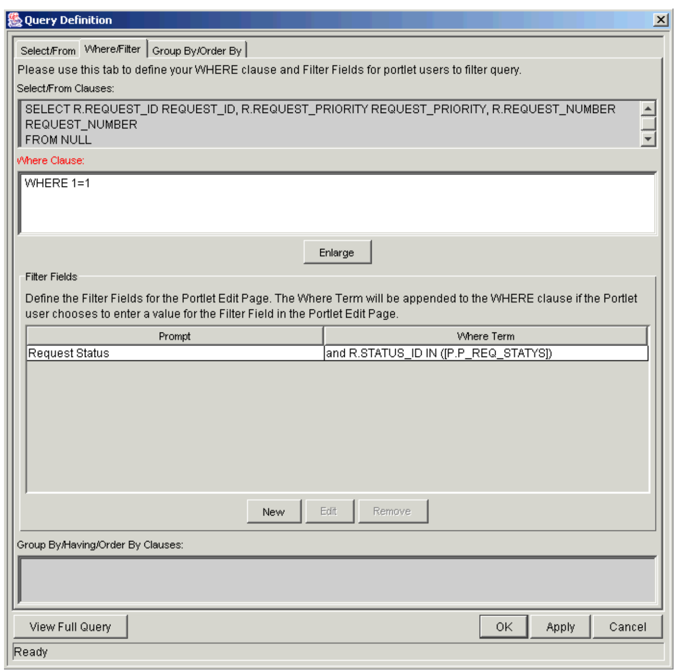
c. In the From Clause field, enter the database table(s) or view(s) the Portlet will be drawing from.

   The From Clause field is a free-form SQL text entry area. Portlets can display data from any external database accessible from the system. This can be done using the **Select/From** tab of the Query Definition window. Include database links to external sources' tables and/or views in the **FROM clause**, following standard SQL formats.

d. Click **Apply** to save the edits in the **Select/From** tab.

5. Edit the **Where/Filter** tab.

   a. Click the **Where/Filter** tab.

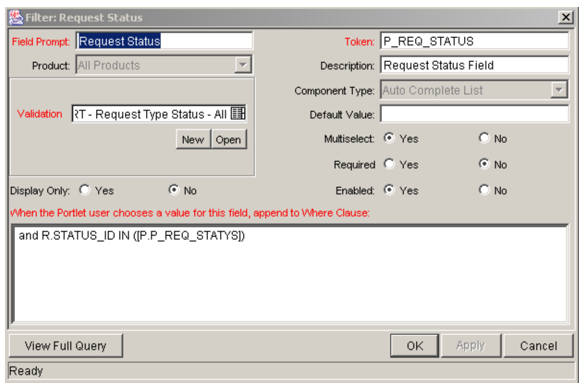


b. Enter data into the Where Clause field.

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

c. Click **New** to define the filter fields.

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



d. Enter data into all required fields and any optional fields as specified in *Table 3-3*.

Table 3-3. Filter fields

Field	Description
Field Prompt	The prompt for the filter field that is shown in the Portlet's edit page.
Token	The Token for the filter field.
Product	The product the filter field belongs to (should always be **All Products**).
Description	The description of the filter field.
Validation	The Validation for the filter field.
Component Type	The component type for the filter field, determined by its Validation.
Default Value	The default value for the filter field, determined by its Validation.

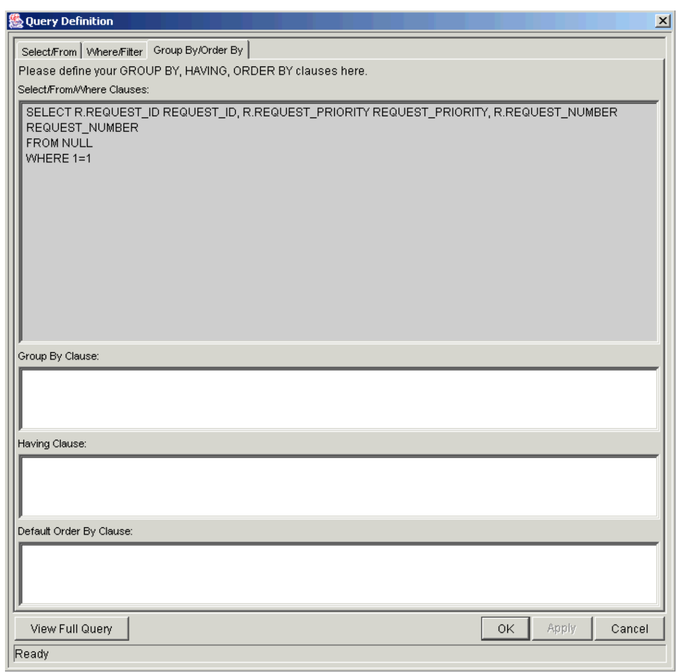
Table 3-3. Filter fields [continued]

Field	Description
Multi-Select Enabled	Determines whether the filter field, if an auto-complete list, is enabled for multi-select.
Required	Determines whether the filter field is required on the Portlet's edit page.
Display Only	Determines whether the filter field is updatable.
Enabled	Determines whether the filter field is enabled.
When the Portlet user chooses a value for this field, append to Where clause	The AND clause that is appended to the Portlet's WHERE clause if the user enters a value in this filter field. This field is a free-form SQL entry area. Each filter field will append its term to the Portlet query, but only when the filter field is being used by a Dashboard user.

e. Click **Apply** to save the edits in the **Where/Filter** tab.

6. Complete the fields in the **Group By/Order By** tab.

a. Click the **Group By/Order By** tab.



b. Enter data into all required fields and any optional fields as specified in *Table 3-4*.

Table 3-4. Group By/Order By fields

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

c. Click **View Full Query** to view the full Portlet query.

d. Click **Apply** to save the changes to the **Group By/Order By** tab.

7. Click **OK** to save the Portlet query and close the Query Definition window.

Defining the Portlet's Displayable Columns

Displayable Portlet columns have many attributes to be configured. These attributes are set in the Column Definition window, which can be accessed in the following ways:

- When defining a column in the **Select/From** tab of the Query Definition window, select the **Add** as **Displayable Column** check box and click **Add**.
- In the **Display Columns** tab of the Portlet window, click **New**. At least one column must be defined in the Query Definition window.
- In the **Display Columns** tab of the Portlet window, select an existing column and click **Edit**.

To configure a Portlet column:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

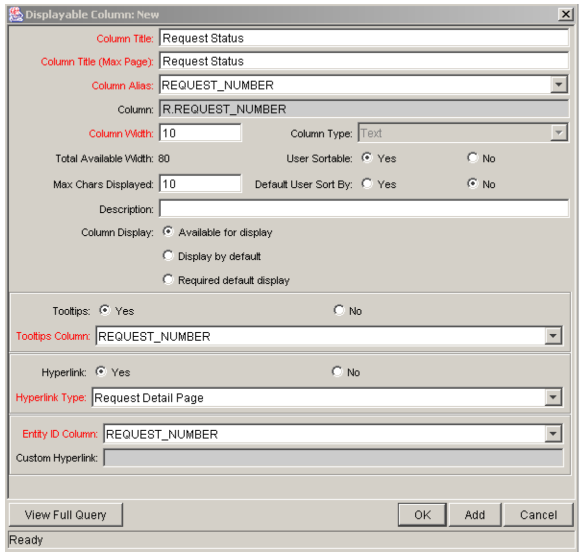
2. Open the Column Definition window.

   a. Click the **Display Columns** tab.

b. Select an existing column.

c. Click **Edit**.

The Displayable Column window opens.



3. Enter data into all required fields and any optional fields as specified in *Table 3-5*.

Table 3-5. Displayable Column fields

Field	Description
Column Title	The title of the column that appears in the Portlet.
Column Title (Max Page)	The title of the column that appears in the maximized Portlet page.
Column Alias	The alias used for the column (useful for Tooltips), defined in the **Select/From** tab of the Query Definition window.
Column	The column name or expression used to define the column, defined in the **Select/From** tab of the Query Definition window.
Total Available Width	Indicates the number of characters remaining in the width of the Portlet. This field is updated every time **OK** or **Apply** is clicked.

Table 3-5. Displayable Column fields [continued]

Field	Description
Max Chars Displayed	Specifies the width of the Portlet in characters. For narrow Portlets, the maximum is 38. For wide Portlets, the maximum is 90.
Column Type	The type of the column, such as Text, Number, Summary Condition/Exception, Date, or Percentage Bar.
User Sortable	Determines whether this column displays as an option in the Sort By drop down list on the Portlet's edit page.
Default User Sort By	Determines whether this column is the default Sort By value on the Portlet's edit page. Only one column can have this set to **Yes**.
Description	The description of the column.
Column Display	Sets the type of Column Display. The Column Display options are: • Available for display Sets the column as available for display. The column appears in the Available Columns field of the Portlet's edit page. • Displayed by default Sets the column as a default column. The column appears in the Selected Column field of the Portlet's edit page. The column can be moved to the Available Columns field and not be displayed on the Portlet. • Required default display Sets the column as a required default column. The column appears in the Selected Column field of the Portlet's edit page. The column cannot be moved to the Available Columns field. This column is always displayed in the Portlet.
Tooltips	Determines whether the data in the current column has Tooltips displayed. **Yes** enables the Tooltips Column field.
Tooltips Column	Selects a column from the **Select/From** tab of the Query Definition window to be displayed as Tooltips.
Hyperlink	Determines whether the column data has a hyperlink. **Yes** enables the Hyperlink fields on the Portlet.
Hyperlink Type	If the column data is a hyperlink, determines the target of the hyperlink, such as Request Detail page, Task Detail page, custom hyperlink, etc.

Table 3-5. Displayable Column fields [continued]

Field	Description
Entity ID Column	The entity ID column from the **Select/From** tab of the Query Definition window, used to identify the hyperlink target.
Custom Hyperlink	The URL to a custom page. Enabled if **Custom Hyperlink** is selected from Hyperlink Type drop down list.

4. Click **OK** to save the column configuration and close the Displayed Column window.

Defining Filter Fields

Each Portlet can include filter fields on its edit page. Individual users select criteria from these fields to display more meaningful information in the Portlet. Filter criteria are entered from a filter field and appended to the Portlet query through AND clauses. Filter fields are defined from the Filter window, which can be reached in the following ways:

- In the **Where/Filter** tab of the Query Definition window, click **New**.
- In the **Where/Filter** tab of the Query Definition window, select an existing filter field in the table and click **Edit**.
- In the **Filter Fields** tab of the Portlet window, click **New**.
- In the **Filter Fields** tab of the Portlet window, select an existing filter field in the table and click **Edit**.

To define a filter field:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

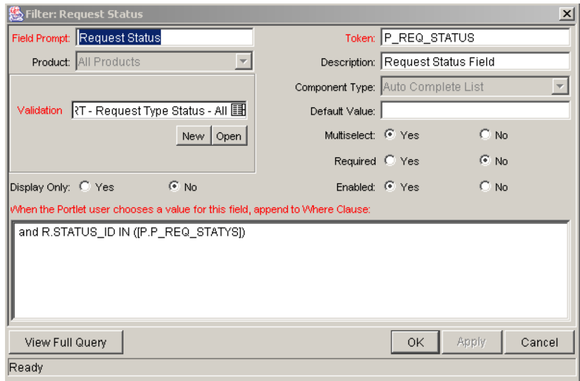
2. Open the Filter window.

   a. Click the **Filter Field** tab.

   b. Select a field.

   c. Click **Edit**.

The Filter window opens.



3. Fill in all required fields and any optional fields as specified in *Table 3-6*.

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

Table 3-6. Filter fields

Field	Description
Field Prompt	The prompt for the filter field that is shown in the Portlet's edit page.
Token	The Token for the filter field.
Product	The product the filter field belongs to. This should always be **All Products**.
Description	The description of the filter field.
Validation	The Validation for the filter field.
Component Type	The component type for the filter field, determined by its Validation.
Default Value	The default value for the filter field, determined by its Validation.
Multi-Select Enabled	Determines whether the filter field, if an auto-complete list, is enabled for multi-select.
Required	Determines whether the filter field is required on the Portlet's edit page.

Table 3-6. Filter fields [continued]

Field	Description
Display Only	Determines whether the filter field is updatable.
Enabled	Determines whether the filter field is enabled.
When the Portlet user chooses a value for this field, append to Where clause	The AND clause that is appended to the Portlet's WHERE clause if the user enters a value in this filter field.

4. Click **Add** to save the filter field or click **OK** to save the filter field and close the Filter window.

Laying Out Filter Fields

This section details how to change the graphical presentation of the filter fields on the Portlet's edit page. The graphical presentation of the filter fields is configured on the **Filter Layout** tab of the Portlet window.

This section covers the following topics:

- *"Modifying the Width of a Filter Field"* on page 27
- *"Moving a Filter Field"* on page 28
- *"Switching the Positions of Filter Fields"* on page 29

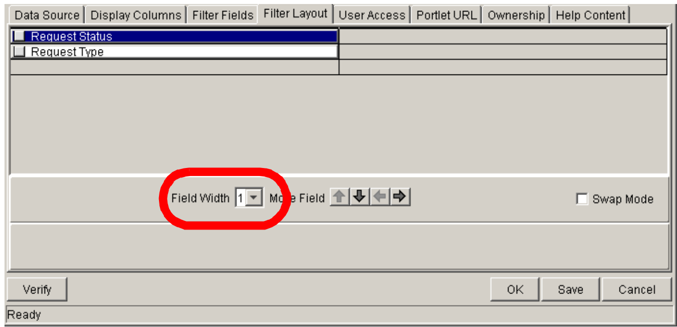
Modifying the Width of a Filter Field

To change the column width of a field:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **Filter Layout** tab.



3. Select the field.

4. From the Field Width drop down list, select 1 (for narrow Portlets) or 2 (for wide Portlets).

5. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

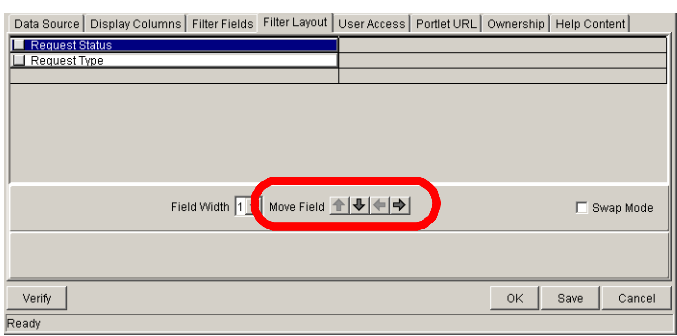
Moving a Filter Field

To move a field or a set of fields:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **Filter Layout** tab.



3. Select the field(s).

To select more than one field, press the **Shift** key while selecting the last field in a set. Selection is either singular or a sequential group. Only a group of adjacent fields can be selected.

4. Move the fields to the location in the layout builder, either by clicking the arrow buttons or using the corresponding keyboard arrow keys.

   A field, or a set of fields, cannot be moved to an area where other fields already exist. Those other fields must be moved out of the way first.

5. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Switching the Positions of Filter Fields

To switch the positions of two filter fields:

1. Open the Portlet window.

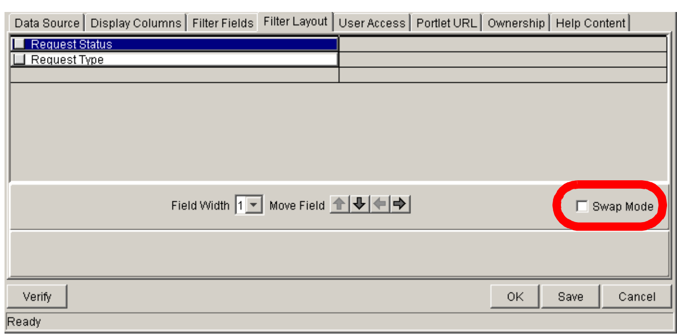
   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **Filter Layout** tab.

3. Select the first field.

4. Select **Swap Mode**.

   This causes an "**S**" to appear in the check box area of the selected field.



5. Once the "**S**" appears, double-click on the field to be swapped.

This causes the two fields to change positions. After the swap is completed, swap mode is automatically turned off. To swap the next selection of fields, repeat the procedure.

6. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Tip

> Swap Mode can also be used between a field and an empty space.

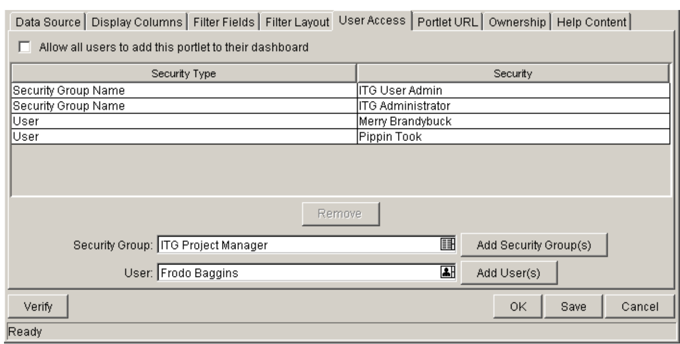
Portlet Security

To define the Security Groups and Users who can access a Portlet:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **User Access** tab.



3. Select whether the Portlet will be restricted to only certain Security Groups or users.

   - If no restriction is necessary, leave the Allow all users to add this Portlet to their dashboard box checked. No further configuration is needed.

   - If only certain Security Groups or users should use the Portlet, de-select the Allow all users to add this Portlet to their dashboard box. The Security Group and User multi-select auto-complete lists are enabled.

4. Specify the Security Groups and Users who can access the Portlet.

   a. From Security Group, select one or many Security Groups.

   b. Click **Add Security Group(s)**.

      The Security Groups are added to the Security Type field. All users with the specified Security Groups have access to the Portlet.

   c. From User, select one or many users.

   d. Click **Add User(s)**.

      The Users are added to the Security Type field. All included users have access to the Portlet.

5. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Portlet URL

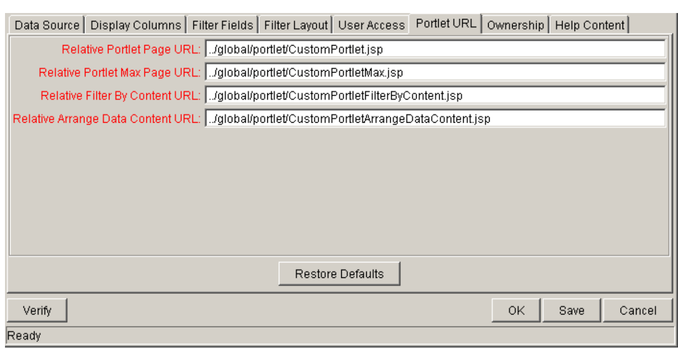
Some Portlets use custom JSP pages. If a custom JSP page exists for the Portlet, the location of the JSP page must be specified.

Define a JSP page for a Portlet:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **Portlet URL** tab.



3. Enter the information as specified in *Table 3-7*.

Table 3-7. Portlet URL fields

Field	Definition
Relative Portlet Page URL	The JSP page that displays the Portlet in the Dashboard.
Relative Portlet Max Page URL	The JSP page that displays the Portlet in its own Maximized page.
Relative Filter By Content URL	The JSP page that displays the Filter By section of the Portlet's edit page.
Relative Arrange Data Content URL	The JSP page that displays the Arrange section of the Portlet's edit page.

4. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Note

Only very advanced users with extensive knowledge of JSP should create their own JSP pages for Portlets. All other users will not need to use the **Portlet URL** tab.

Setting Ownership for Portlets

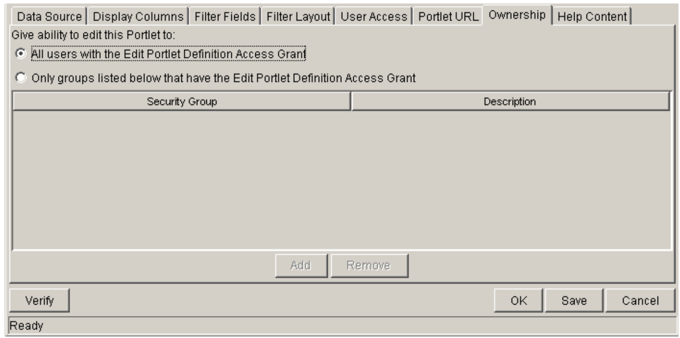
Different groups of users have ownership and control over entities. These groups are referred to as Ownership Groups. Members of an Ownership Group are the only users who have the right to edit, delete or copy that entity. An Ownership Group consists of one or more Security Groups.

To configure a Portlet's Ownership Group:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

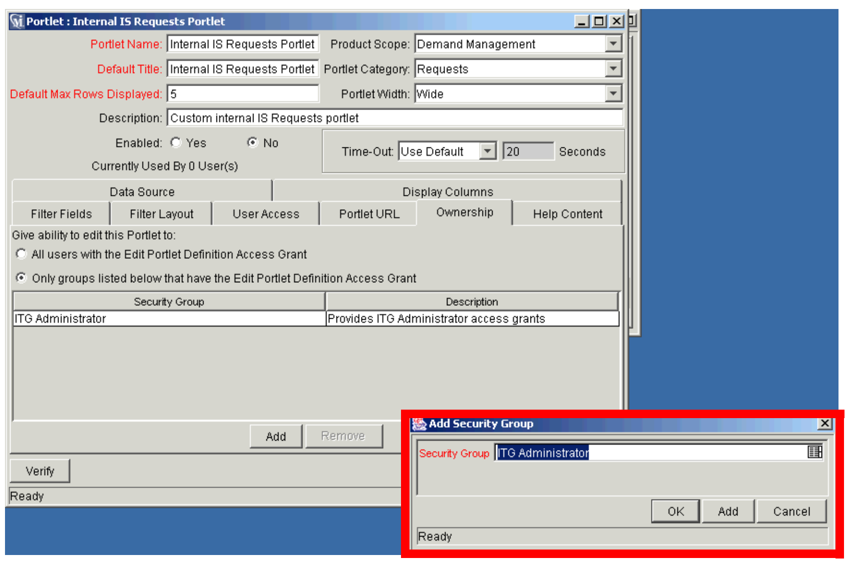
2. Click the **Ownership** tab.



3. Click **Only groups listed below that have the Edit Portlet Definition Access Grant**.

4. Click **Add**.

   The Add Security Group window opens.



5. From Security Group, select one or more Security Groups.

6. Click **OK**.

   The Security Group is added to the **Ownership** tab.

7. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

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

Note

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. Refer to *Security Model Guide and Reference* for more information on Access Grants.

Users with the 'Ownership Override' Access Grant and can access configuration entities even if the user is not a member of one of the Ownership Groups and does not have the specific Edit Access Grant.

Creating a Help Window for the Portlet

The Portlet **Help Content** tab provides customizable help content information for Portlets. The result is that where help content is configured, users can open that Help window by clicking the **Help Content** icon (?).

To create a help window for a custom Portlet:

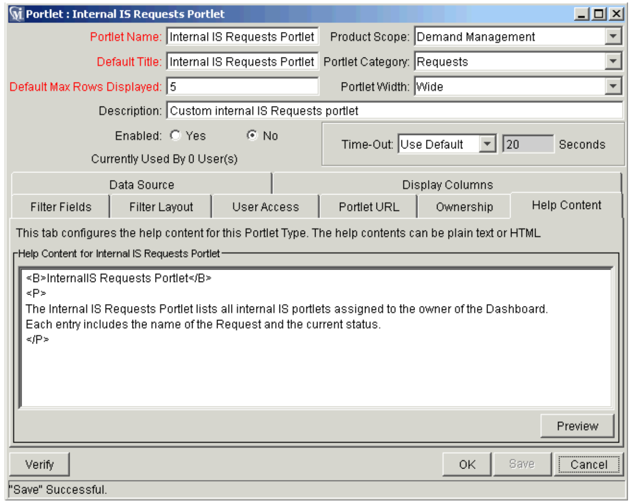
1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

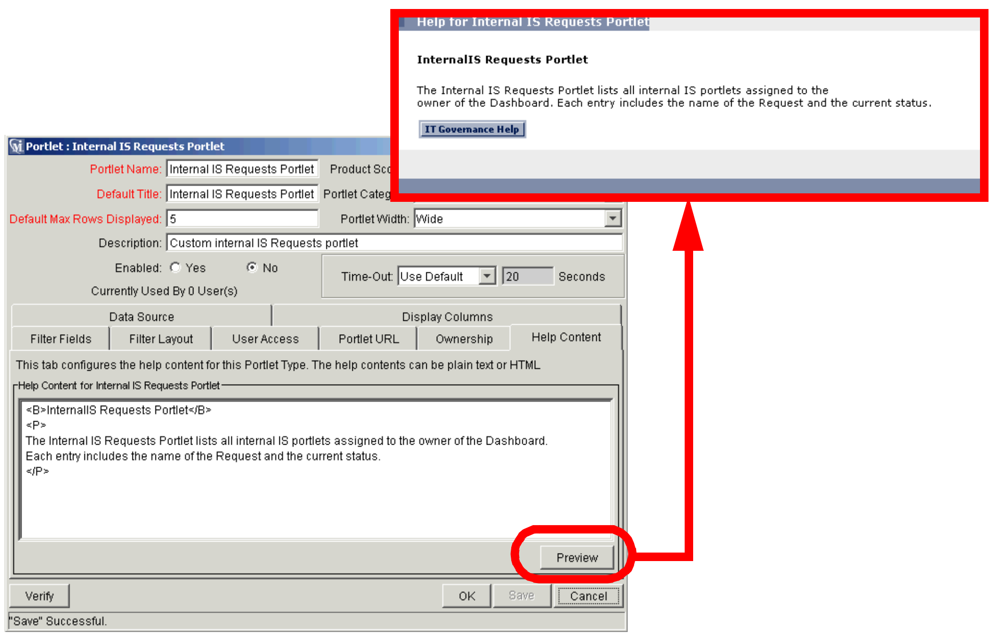
2. Click the **Help Content** tab.

3. Enter the help information associated with this custom Portlet.

   Data can be entered in plain text or HTML formats.



4. Click **Preview** to view the Help content in a browser window.



5. In the **Help Content** tab, click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Requiring First-Time Personalization

You can require all users to personalize a custom Portlet the first time they see it on their Dashboard. By requiring first-time personalization of a Portlet, the user will see the message: **Please edit the default search criteria for this Portlet** when adding the Portlet to a Dashboard.

To require first-time users to personalize a Portlet:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **Filter Fields** tab.

3. Set Require First Time Personalization By User to **Yes**.

4. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Note

Only members of designated Ownership Groups with the **Edit Portlet Definition Access Grant** can change this personalization setting. See *"Setting Ownership for Portlets"* on page 32 for more information about Ownership.

Verifying the Custom Portlet

Once the custom Portlet is complete, verify the Portlet to make sure the query's Tokens and column interactions in the **Data Source** tab are correct.

To verify a custom Portlet:

1. Open the Portlet window.

   See *"Assigning a Name to the Custom Portlet"* on page 14 for details on how to open the Portlet window.

2. Click the **Data Source** tab.

3. Click **Verify** to verify the query's Tokens and column interaction.

The verify function will report any of the following possible errors in the Portlet's construction:

- Any invalid Tokens

- At least one column should be defined in the SELECT table of the Query Definition window
- At least one column should be displayed in the Portlet
- The FROM clause should be defined in the Query Definition window
- Tooltips and Hyperlinks columns should be valid in the SELECT table of the Query Definition window, if used

Note

The Verify Portlet window does not verify any user-defined SQL.

Once the Portlet's query Tokens and column interactions are verified, the Portlet is ready to be enabled and added to a Dashboard. See *"Enabling and Maintaining Portlets"* on page 39 for more information.

Chapter

4

Enabling and Maintaining Portlets

The Mercury IT Governance Dashboard provides visibility into real-time Mercury ITG data while work is in progress. This data is presented through Portlets. This chapter discusses how to enable custom Portlets and the procedures to maintain standard and custom Portlets.

This chapter covers the following topics:

- *"Enabling Custom Portlets"* on page 39
- *"Editing Standard and Custom Portlets"* on page 44
- *"Configuring Request Graphical Portlet Displays"* on page 50
- *"Portlet Detail Report"* on page 51
- *"Portlet Migrator"* on page 53

Enabling Custom Portlets

This section lists the considerations and steps required to add a Portlet to the Dashboard. Once a custom Portlet is built and verified, the Portlet must be enabled before it can be accessed through the Dashboard. In addition, a custom Portlet might require a new Portlet category definition and changes to the Portlet's access permissions.

This section covers the following topics:

- *"Enabling a Custom Portlet"* on page 40
- *"Defining Custom Portlet Categories"* on page 40
- *"Setting Portlet Access"* on page 43

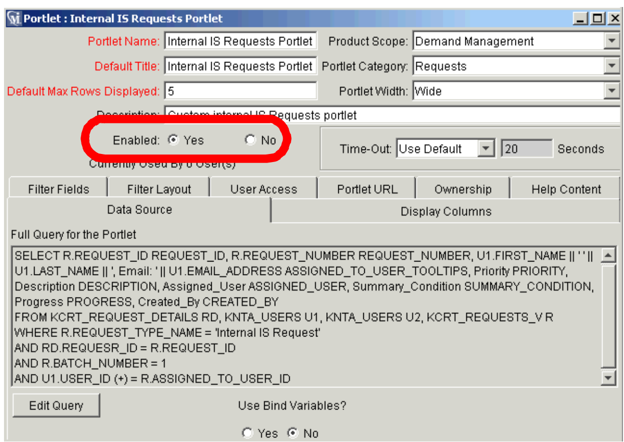
Enabling a Custom Portlet

All custom Portlets must be enabled before they can be accessed through a Dashboard.

To enable a Portlet for use:

1. In the Portlet Workbench window, open the Portlet window for the Portlet to enable.

2. In Enable, select **Yes**.



3. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Defining Custom Portlet Categories

Portlet categories organize Portlets into functional groups. Custom Portlets can be added to an existing Portlet category or a custom Portlet category can be created. *Figure 4-1* shows an example of the Portlet Category Drop Down list.

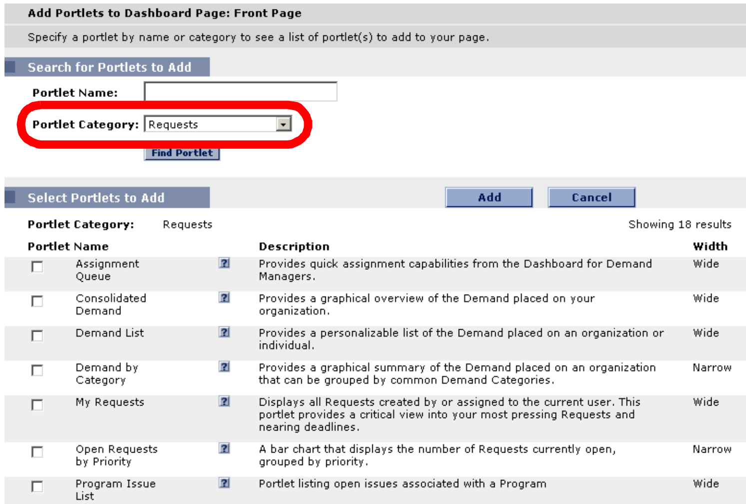


Figure 4-1 Example: Portlet Category Drop Down List

To add a Portlet category:

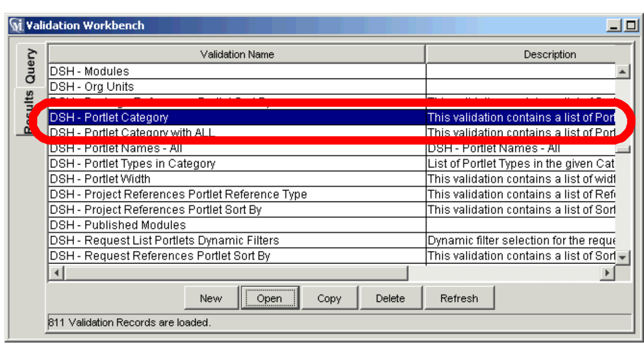
1. From the Shortcut menu, click **Configuration > Validations**.

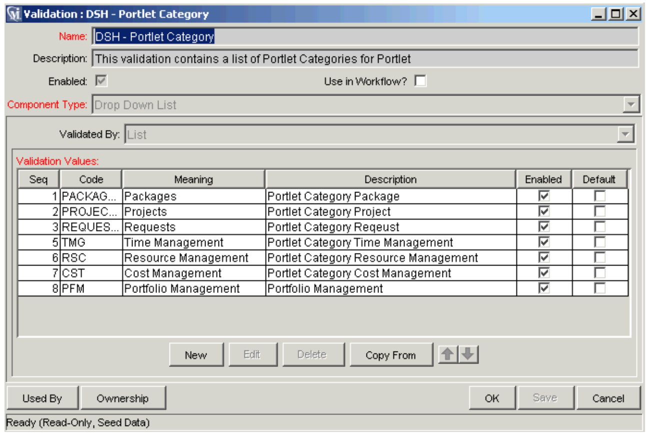
   The Validation Workbench window opens.

2. Click **List**.

   The **Results** tab opens.

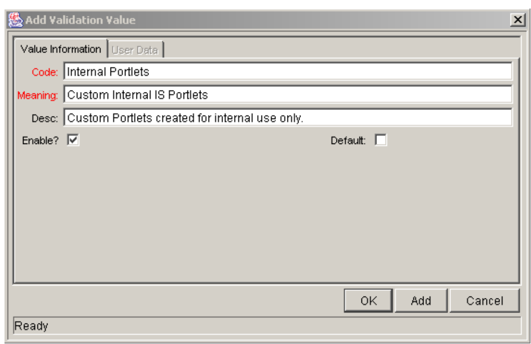
3. Open the DSH - Portlet Category Validation.





4. Click **New**.

   The Add Validation Value window opens.



5. Enter the values into the fields as specified in *Table 4-1*.

Table 4-1. Add Validation Value fields

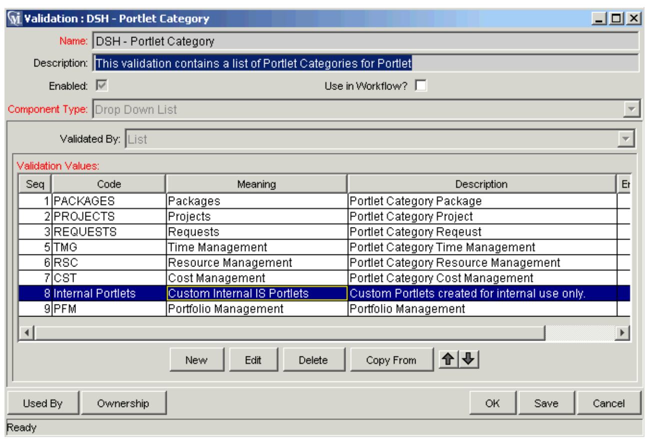
Field	Description
Code	The underlying code for the Validation value. The code is the value stored in the database or passed to any internal functions, and is rarely displayed.
Meaning	The displayed meaning for the Validation value in the drop down list or auto-complete.
Desc	A description of the Validation value.

Table 4-1. Add Validation Value fields [continued]

Field	Description
Enable	Determines whether the Validation value is enabled. **Yes** enables the Validation value.
Default	The default value for the list. This value is initially displayed in drop down lists (this is not used for auto-complete lists). There can be only one default value per list.

6. Click **OK** to close the Add Validation Value window or click **Add** to enter another Portlet category.

   The new **Validation** values appear in the Validation window.



7. In the Validation window, click **OK**.

Setting Portlet Access

You can control which users can access certain Portlets, depending on their business role in the organization.

Example

John Smith, the CIO of a financial firm, does not want every employee to have access to the Project Risk Portlet. He can configure the Portlet so that only he and his senior staff can view that Portlet.

Access to Portlets can be configured so that only certain users or Security Groups can use them. See *"Portlet Security"* on page 30 for a detailed procedure on how to set up a Portlet's user access.

> Note
>
> If the global permission option was selected in the **Ownership** tab, all users with the Edit Portlet Definition Access Grant can configure Portlet security. If the global permission option was not selected, only members of designated Ownership Groups with the Edit Portlet Definition Access Grant can configure Portlet security. See *"Setting Ownership for Portlets"* on page 32 for more information about Ownership.

Editing Standard and Custom Portlets

Custom Portlets can be edited using the same processes by which they were created. Standard Portlets only allow edits of their user access permissions and help windows.

This section covers the following topics:

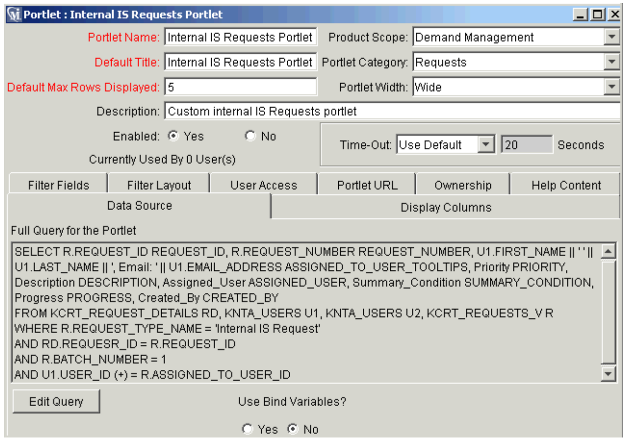
Editing a Custom Portlet's Layout

The graphical presentation of custom Portlet columns can be modified in the Displayed Columns window.

> Note
>
> Columns cannot be modified in standard Portlets.

To change the order of columns in a custom Portlet:

1. Open the Portlet in the Portlet window.



2. Click the **Displayed Columns** tab.

3. Select the column display type.

   The selects are:

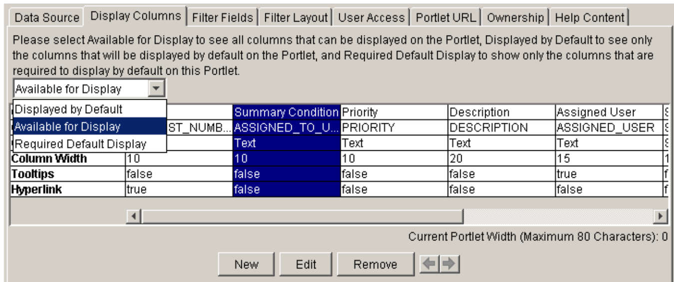
   - **Displayed by Default**
     The column is displayed in the Portlet. The column can be configured not to be displayed in the Portlet using the Portlet's edit page.

   - **Available for Display**
     The column is not displayed in the Portlet. The column can be configured to be displayed in the Portlet using the Portlet's edit page.

   - **Required Default Display**
     The column must be displayed in the Portlet.

4. Select the column to move.

5. Click the direction arrow buttons (or) to move the column.



6. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Note

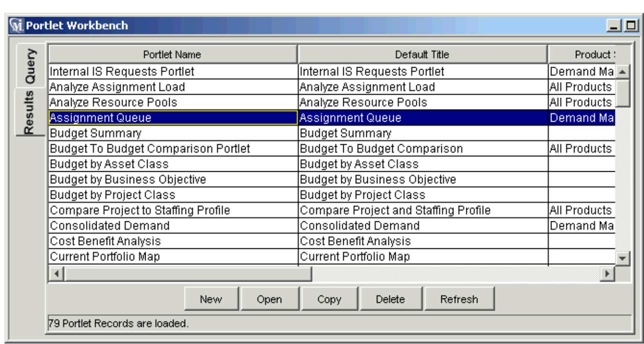
Only members of designated Ownership Groups with the Edit Portlet Definition Access Grant can edit the Portlet column layout. See *"Setting Ownership for Portlets"* on page 32 for more information about Ownership.

Deleting a Custom Portlet

This section details how to delete a custom Portlet. Standard Portlets cannot be deleted.

To delete a custom Portlet:

1. From the Portlet Workbench window, select the Portlet.



2. Click **Delete**.

   The Portlet is deleted.

Note

Portlets currently being used by users cannot be deleted. Users must remove the Portlet from their Dashboards before the Portlet can be deleted from the system.

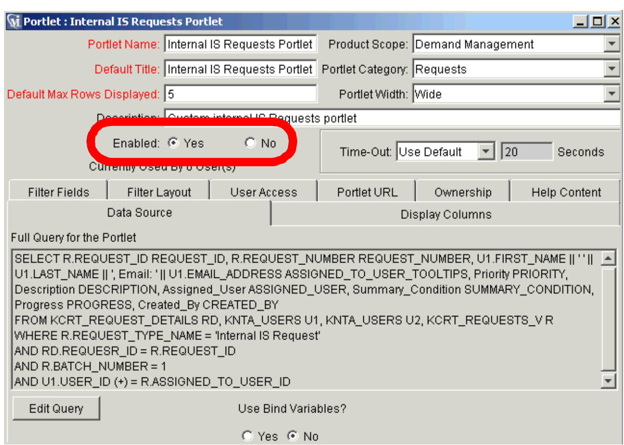
If the global permission option was selected in the **Ownership** tab, all users with the Edit Portlet Definition Access Grant can delete the Portlet. If the global permission option was not selected, only members of designated Ownership Groups with the Edit Portlet Definition Access Grant can delete the Portlet. See *"Setting Ownership for Portlets"* on page 32 for more information about Ownership.

Disabling a Standard or Custom Portlet

To disable a Portlet from use:

1. Open the Portlet in the Portlet window.

2. In Enabled, select No.



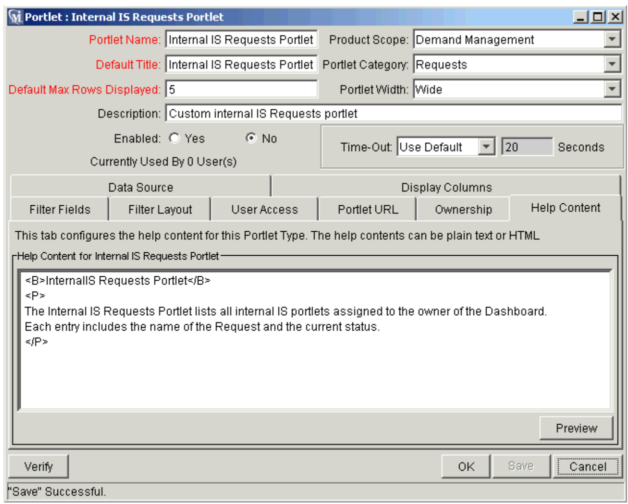
3. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Editing Standard and Custom Portlet Help Content

To edit the Help Content tab:

1. Open the Portlet in the Portlet window.

2. Click the **Help Content** tab.



3. Enter the help information associated with the Portlet.

   Data can be entered in plain text or HTML formats.

4. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

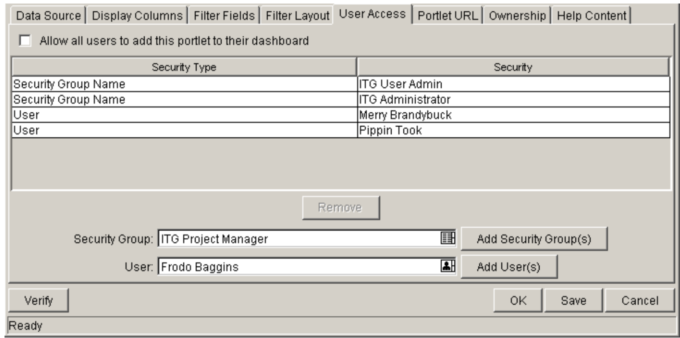
Editing Standard and Custom Portlet User Access

User access to both standard and custom Portlets can be modified. User access for Portlets is defined in the Portlet window under the **User Access** tab.

To define the Security Groups and Users who can access a Portlet:

1. Open the Portlet in the Portlet window.

2. Click the **User Access** tab.



3. Select whether the Portlet will be restricted to only certain Security Groups or users.

   - If no restriction is necessary, leave the Allow all users to add this Portlet to their dashboard box checked. No further configuration is needed.

   - If only certain Security Groups or users should use the Portlet, de-select the Allow all users to add this Portlet to their dashboard box. The Security Group and User multi-select auto-complete lists are enabled.

4. Specify the Security Groups and Users who can access the Portlet.

   a. From Security Group, select one or many Security Groups.

   b. Click **Add Security Group(s)**.

      The Security Groups are added to the Security Type field. All users with the specified Security Groups have access to the Portlet.

   c. From User, select one or many users.

   d. Click **Add User(s)**.

      The Users are added to the Security Type field. All included users have access to the Portlet.

5. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Propagating Change to Existing Portlets

Changes to any aspect of a standard or custom Portlet take effect immediately upon a save. Portlets not enabled cannot be placed on the Dashboard, so users remain unaffected. Portlets in use exhibit the changes once the user refreshes the page that contains the Portlet.

> **Note**
> If a Portlet's definition is altered such that a user no longer has access to that Portlet, the Portlet will be deleted from the user's Dashboard. If the Portlet's definition is altered again to re-include the user, the Portlet must re-added to the Dashboard by the user.

Configuring Request Graphical Portlet Displays

This section details how to configure a Request graphical Portlet's drill down page. Clicking a link of a graphical Portlet opens the Portlet's drill down page. The columns displayed on the drill down page are set in the Request Type. *Figure 4-2* shows the Request Summary Portlet and the drill down page from the Request Summary Portlet.

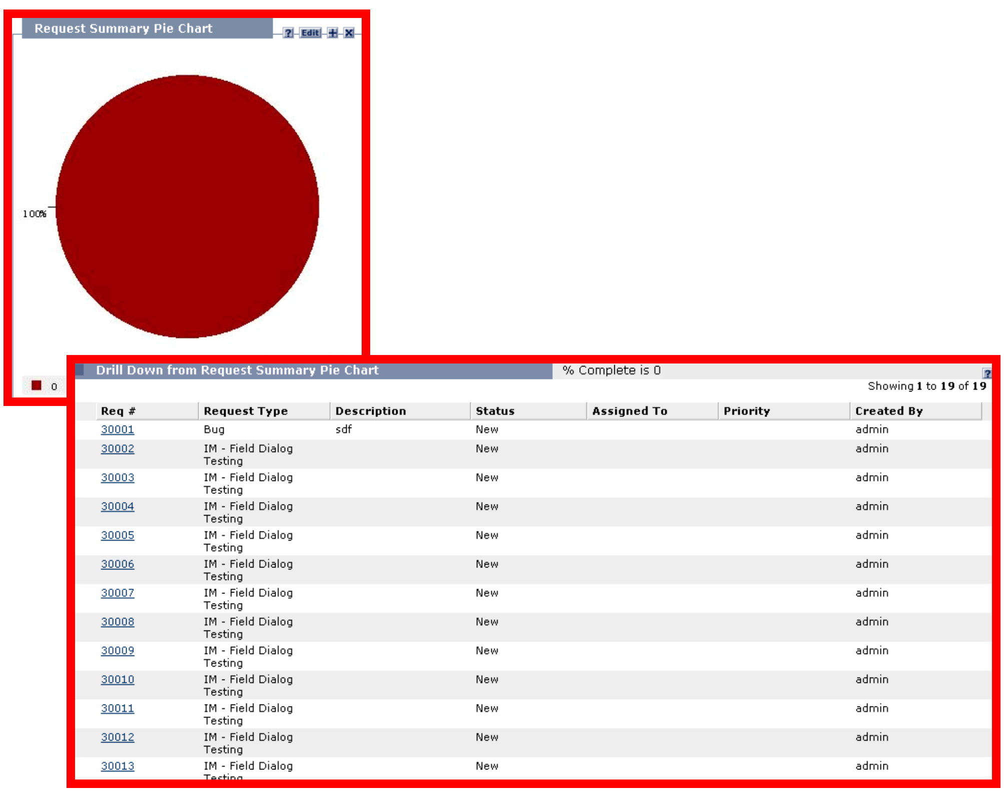


Figure 4-2 Request Summary Portlet and Drill Down Page

Configuration of the drill down page for a Request graphical Portlet is done in the Request Type Workbench. For more information, see *Configuring a Request Resolution System*.

To configure a Request Type for a Graphical Request Portlet:

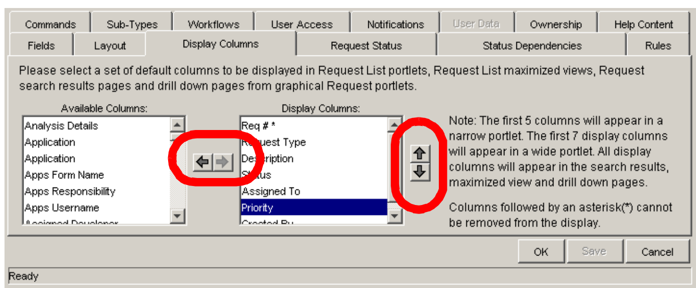
1. From the Workbench, select **Create > Request Type**.

   The Request Type Workbench opens.

2. Create a new Request Type or edit an existing Request Type.

   The Request Type window opens.

3. Click the **Display Columns** tab.



4. In the Available Columns field, highlight entries.

5. Click the right arrow () to move the Available Columns field entries to the Selected Columns field.

6. Change the order of the entries in the Selected Columns field using the up-and-down arrows.

7. Click **OK** to save the changes and close the Request Type window.

Portlet Detail Report

The Portlet Detail Report is used to return the details of a Portlet or range of Portlets. It lists the Portlet's columns, as well as the SQL query used by the Portlet to retrieve data from the system. The Portlet's filter fields and security configuration can also be listed.

Note

The Portlets displayed by the report might be restricted. The user running the report will only see information on the Portlets for which that user has access, based on settings in the Portlet **User Access** tab. If the user can access the Portlet, that Portlet will be included in the report. Otherwise, information about the Portlet will not be included in the report.

The Portlet Detail Report is available from any of the Workbench Report Screen Groups, such as **Change Mgmt > Reports** or **Demand Mgmt > Reports**. The Portlet Detail Report is not available in the standard interface.

To submit a Portlet Detail Report:

1. From the Workbench, select **Change Mgmt > Reports**.

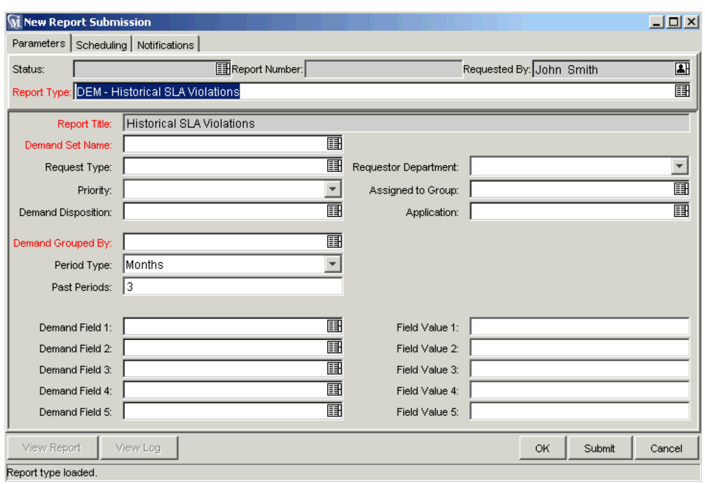
   The Report Submission Workbench opens.

2. Click **New Report**.

   The New Report Submission window opens.

3. In the Report Type field, select **Portlet Detail Report**.

   The New Report Submission window is updated with the **Portlet Detailed Report** fields.



4. Enter data into all required fields and any optional fields as listed in *Table 4-2*.

Table 4-2. Parameters - Portlet Detail Report fields

Field	Description
Portlet From	Only select Portlets that are alphabetically equal to or greater than the value in this field.
Portlet To	Only select Portlets that are alphabetically equal to or less than the value in this field.
Show Columns	Determines whether to show Portlet column information.
Show Filter Fields	Determines whether to show Portlet filter field information.
Show Full Query	Determines whether to show the full Portlet query.
Show User Access	Determines whether to show Portlet Security.
Show Portlet URL	Determines whether to show Portlet URLs.
Show Used By	Determines whether to show which users are using this Portlet.

5. Click **Submit**.

   The Portlet Detail Report is started. In the Status field, the status will be **Running**.

   When the Status is **Completed**, the Portlet Detail Report is finished.

6. Click **View Report** to view the results of the report.

Portlet Migrator

Migrators are used to move configuration data such as Validations, Workflows, and Request Types between instances (installations). These Migrators are provided as Mercury Change Management Object Types. For more information on Migrators, see *Migrators Guide and Reference*.

Chapter
5
Configuring Modules

This chapter details the concepts and processes associated with creating and maintaining Modules. Modules provide a means for rapidly disseminating Dashboard pages and Portlets to one or many user Dashboards.

This chapter covers the following topics:

Module Configuration Rules

The following list details the Module configuration rules:

- To configure a Module, an application administrator or user must have the Administrator license and the Sys Admin: Configure Module Access Grant permission.
- To set the Default Dashboard, an application administrator or user must have the Sys Admin: Configure Module Access Grant permission.
- Dashboard pages and Portlets cannot be published separately and must be configured as part of a Module.
- Dashboard pages and Portlets can be distributed separately, but they must be part of a Module.
- A Module must have a unique name.

Configuring Modules

This section provides the step-by-step procedures to create, edit and maintain Modules. Once created and edited, Modules can be published or distributed to one or many Dashboards.

This section covers the following topics:

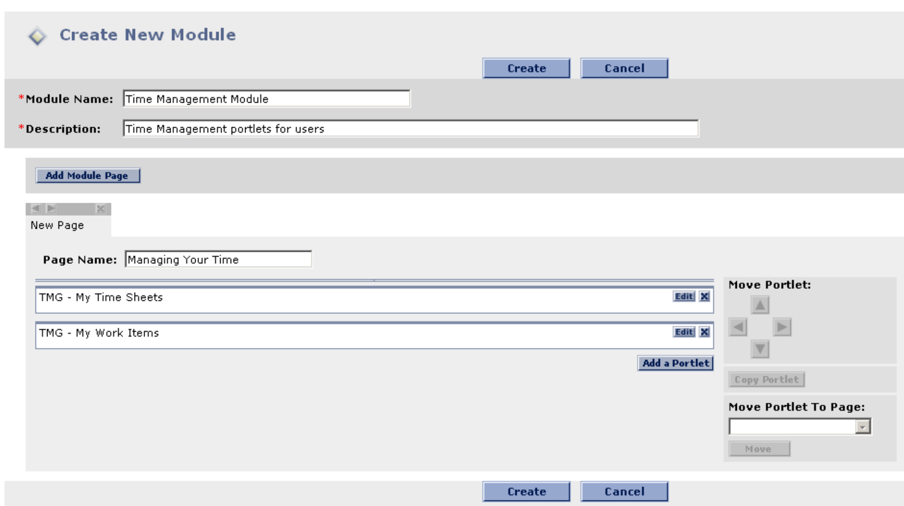
- *"Creating a Module"* on page 56
- *"Searching for a Module"* on page 57
- *"Editing a Module"* on page 61
- *"Copying a Module"* on page 68
- *"Deleting a Module"* on page 70

Creating a Module

To create a new Module:

1. Open the Dashboard.
2. From the menu bar, select **Administration > Dashboard Distribution > Create New Module**.

   The Create New Module page opens.



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

Note

Module names must be unique.

4. In the Description field, enter a brief description.

Note

To add Module pages and Portlets, see *"Editing a Module"* on page 61.

5. Click **Create**.

   The Module is created and the Module Creation Confirmed page opens.

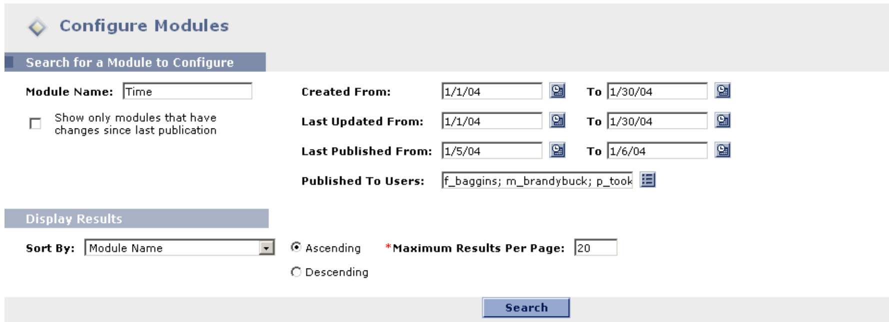
6. Check the Module Creation Confirmed page and verify the Module was created.

Searching for a Module

To search for an existing Module:

1. Open the Dashboard.
2. From the menu bar, select **Administration > Dashboard Distribution > Configure Modules**.

   The Configure Modules page, Search for a Module to Configure section opens.



3. In the Search for a Module to Configure section, edit the search criteria as described in *Table 5-1*.

Table 5-1. Search Criteria fields

Field	Description
Module Name	Enter all or part of a Module's name.
Created From.. To	The date the Module was first created. Allows for a range of dates. Click on the Date Time Finder icon ( ) for help.
Last Updated From.. To	The date the Module was last updated. Allows for a range of dates. Click on the Date Time Finder icon ( ) for help.
Last Published From.. To	The date the Module was last published. Allows for a range of dates. Click on the Date Time Finder icon ( ) for help.
Show only Modules that have changed since last publication	This checkbox sets the search to find Modules changed since they were published.

4. In the Display Results section, enter the search display criteria as described in *Table 5-2*.

Table 5-2. Sort By fields

Fields	Description
Sort By	Set the criteria to sort the results. This is a required field. The possible values are: • **Module Name** Sort the returned values based on the name of the Modules. Module Name is the default value for Sort By. • **Created On** Sort the returned values based on the creation date of the Modules. • **Last Updated On** Sort the returned values based on the last updated date of the Modules. • **Last Published On** Sort the returned values based on the last published date of the Modules. • **Description** Sort the returned values based on the description of the Module.
Ascending and Descending	Sets the display order of the results. Choosing one disables the other.
Maximum Results per Page	This is a required field. Enter the maximum number of results to display per page. The default is ten.

5. Click **Search**.

   The results are displayed in the Select a Module to Configure section. See *Table 5-3* for a list of fields and buttons in the Select a Module to Configure section. The **Previous** and **Next** buttons move the returned value list forwards and backwards.

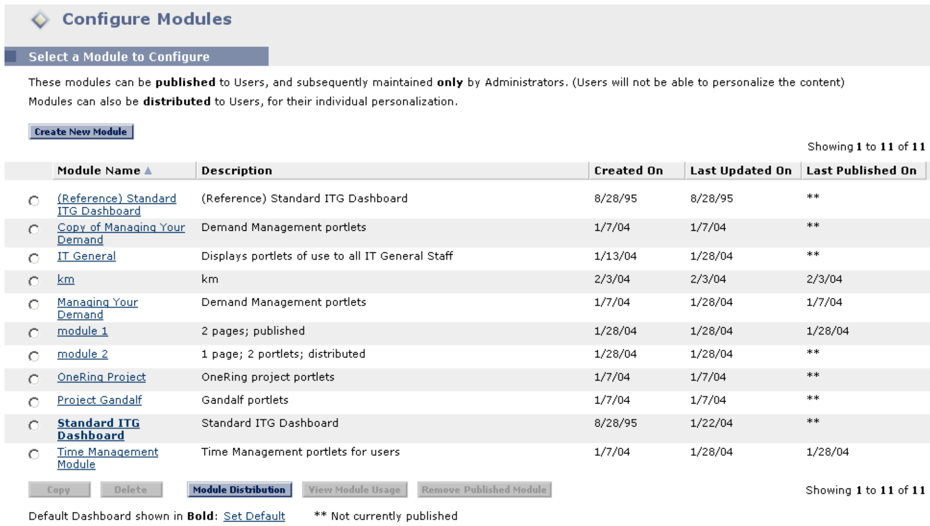


Table 5-3. Select a Module to Configure fields and buttons

Fields / Buttons	Description
Create New Module	Opens the Create New Module page. For more information, see *"Creating a Module"* on page 56.
Module Name	The name of the Module. The name of each Module is linked to the Configure Module page. For more information, see *"Configuring Modules"* on page 56.
Description	A brief description of the Module.
Created On	The date the Module was created.
Last Updated On	The date the Module was last modified.
Last Published On	The date the Module was last published. If this field contains **, the Module is not published.
Copy	Copies a Module. See *"Copying a Module"* on page 68 for more information.
Delete	Deletes a Module. For additional information, see *"Deleting a Module"* on page 70.
Module Distribution	Opens the Module Distribution page. See *"Distributing Modules"* on page 75.
View Module Usage	Opens the View Module Usage page. For additional information, see *"Viewing a Module's Usage"* on page 71.

Table 5-3. Select a Module to Configure fields and buttons [continued]

Fields / Buttons	Description
Remove Published Module	Opens the Remove Published Module page. See *"Removing Published Modules"* on page 86.
Default Dashboard shown in Bold: Set Default	Sets the Default Dashboard. See *"Setting the Default Dashboard"* on page 73 for additional information.
Previous	Moves the returned value list backwards.
Next	Moves the returned value list forwards.

Editing a Module

This section provides an overview of Module configuration procedures.

This section covers the following topics:

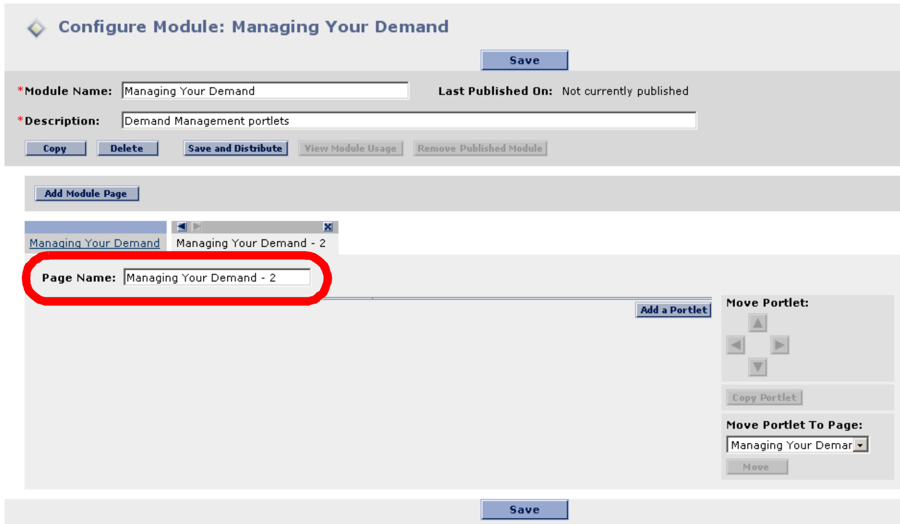
Adding a Module Page

Module pages correspond to Dashboard pages.

To add a Module page to a Module:

1. Open the Module in the Configure Module page.
2. Click **Add Module Page**.

   A new Module page is added to the Module.

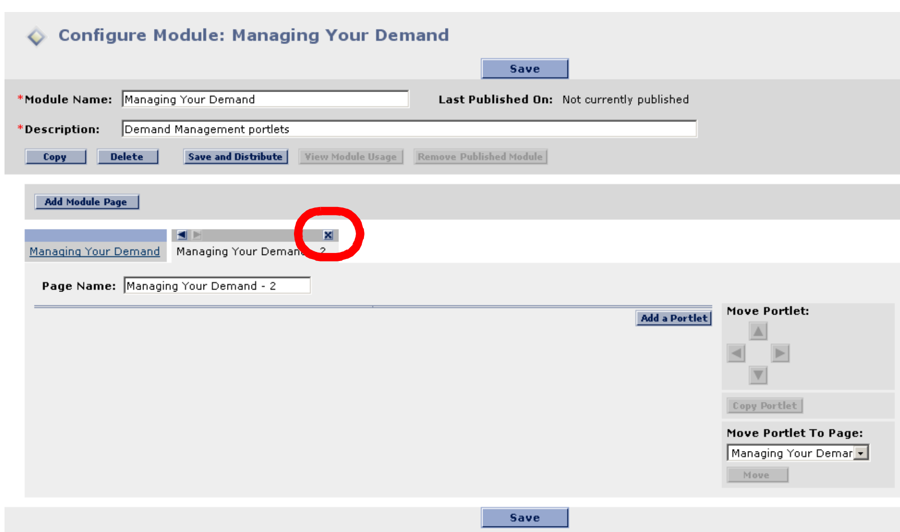


3. In the Page Name field, enter the name for the new Module page.
4. Click **Save** to save the changes.

Deleting a Module Page

To delete a Module page:

1. Open the Module in the Configure Module page.
2. Click the delete button ( ) on the tab of the Module page to delete.



3. Click **Save**.

   The Module page is deleted from the Module.

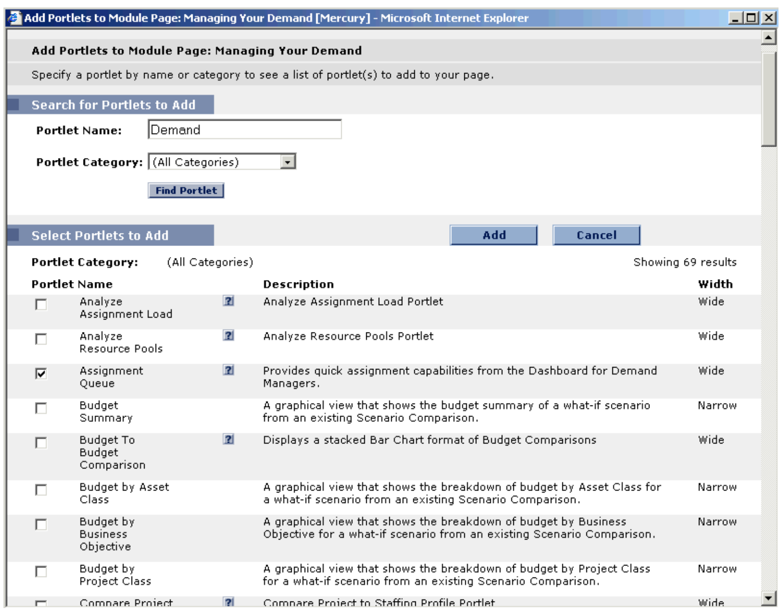
Adding a Portlet to a Module Page

One or many Portlets can be added to a Module page.

To add a Portlet to a Module page:

1. Open the Module in the Configure Module page.
2. Click **Add a Portlet**.

   The Add a Portlet page opens.



3. Click Find Portlet to view the list of available Portlets.

   Limit your search by either entering text or using the drop down list. A list of Portlets matching the search criteria is returned.
4. Select the Portlet to be added to the Module page.
5. Click **Add**.

   The Portlet is added to the Module page.

6. Click **Save**.

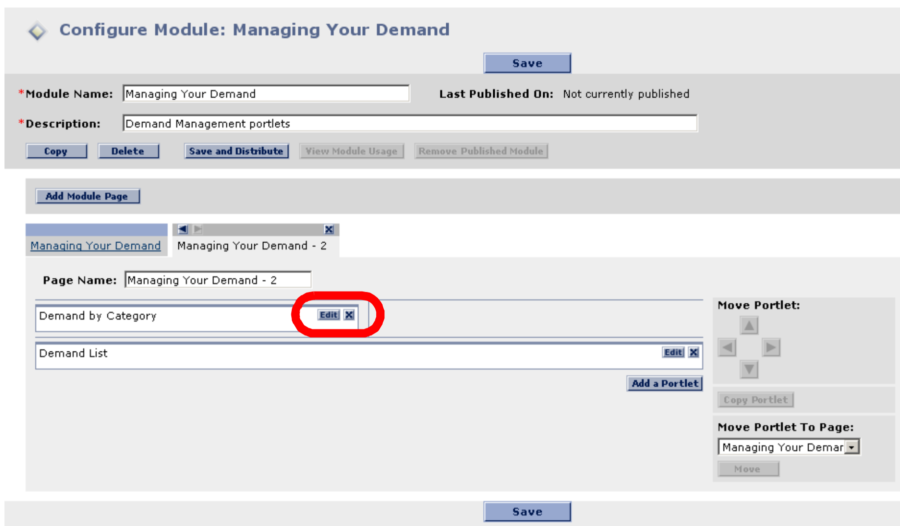
   The Portlet on the Module page is added to the Module.

Deleting a Portlet from a Module Page

To delete a Portlet from a Module page:

1. Open the Module in the Configure Module page.
2. Click the delete button ( ) in the **Edit** icon of the Portlet to delete.

   The Portlet is deleted from the Module's page.



3. Click **Save**.

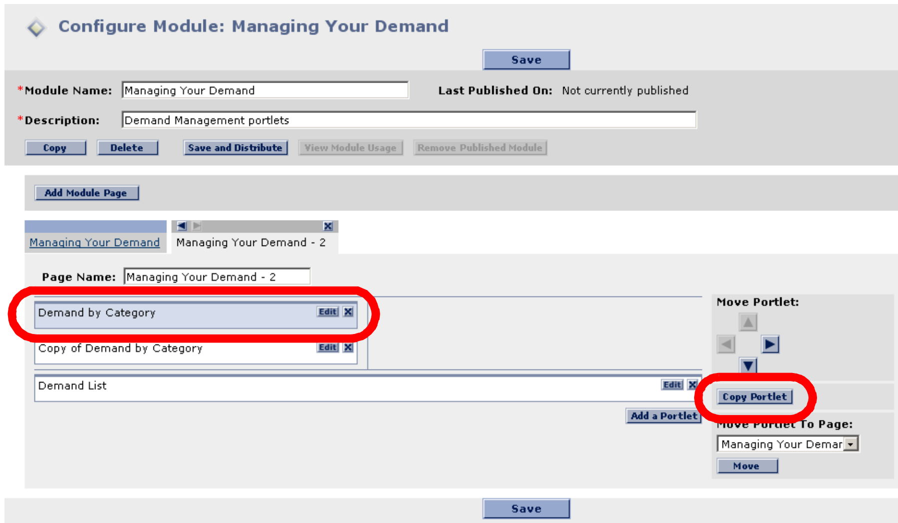
   The Module page is saved to the Module.

Copying a Portlet on a Module Page

To make a copy of an existing Portlet:

1. Open the Module in the Configure Module page.
2. Select a Portlet.
3. Click **Copy Portlet**.

   The copied Portlet appears on the Module page.



4. Click **Save**.

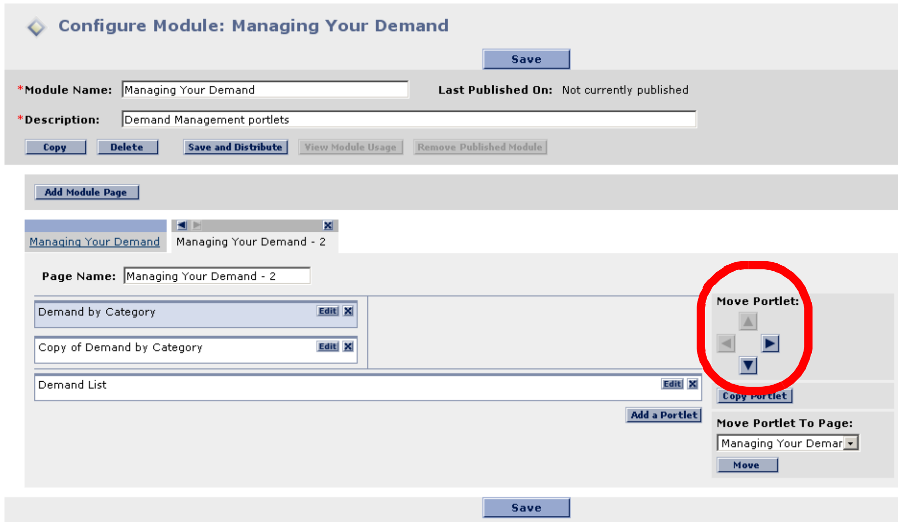
   The copied Portlet is saved to the Module page.

Arranging Portlets on a Module Page

Portlet can be moved around a Module page using the Move Portlet directional arrows. Wide Portlets can only be moved up and down. Narrow Portlets can be moved up and down and from side to side. Depending on the Portlet, the Move Portlet directional arrows will be enabled and disabled.

To move a Portlet on a Module's page:

1. Open the Module in the Configure Module page.
2. Click the Move Portlet directional arrows to move the Portlet.



3. Click **Save**.

   The position of the Portlet is saved.

Note

Portlets can be moved to other Module pages using the **Move Portlet to Page** drop down list and **Move** button.

Editing a Portlet on a Module Page

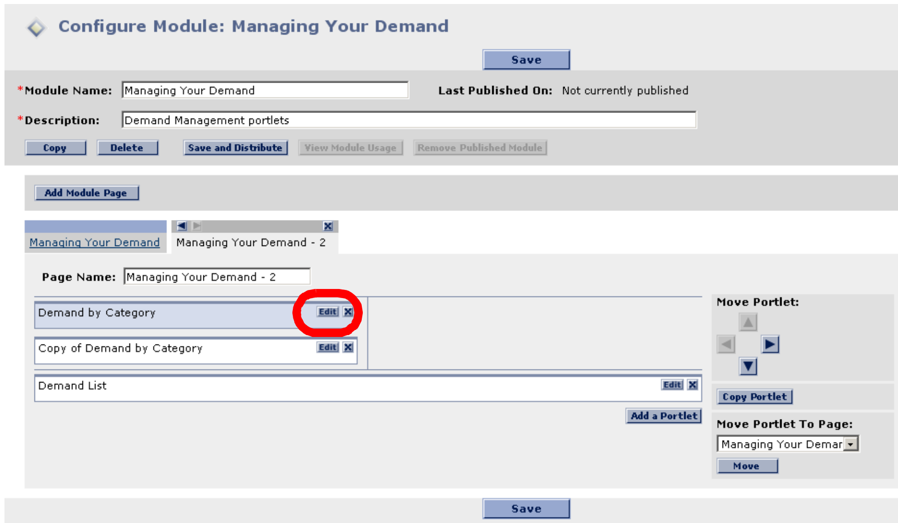
Each standard Portlet has a unique Portlet edit page tailored specifically to its requirements.

To edit a standard Portlet:

1. Open the Module in the Configure Module page.

2. Click **Edit** ().

   The Portlet's edit page opens.

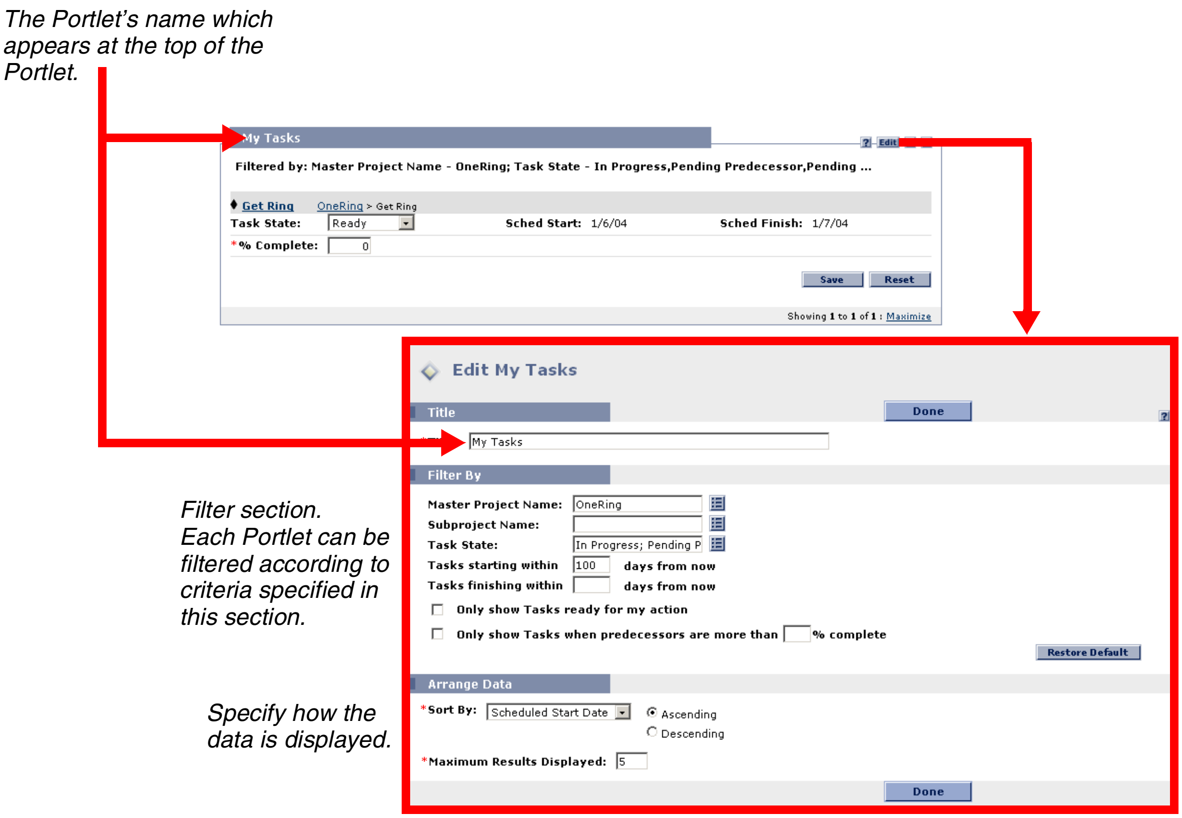


3. Edit the Portlet.

   The Portlet's edit page is used to personalize the Portlet including:

   - Changing the title of the Portlet.
   - Selecting which data to display in the Portlet.
   - Selecting the maximum results to be displayed in the Portlet.

   Each type of Portlet includes unique filter fields. See *Using the Dashboard* for details on how to personalize a Portlet.



4. Click **Done**.

   The edits to the Portlet are saved and the Configure Module page returns.

5. Click **Save**.

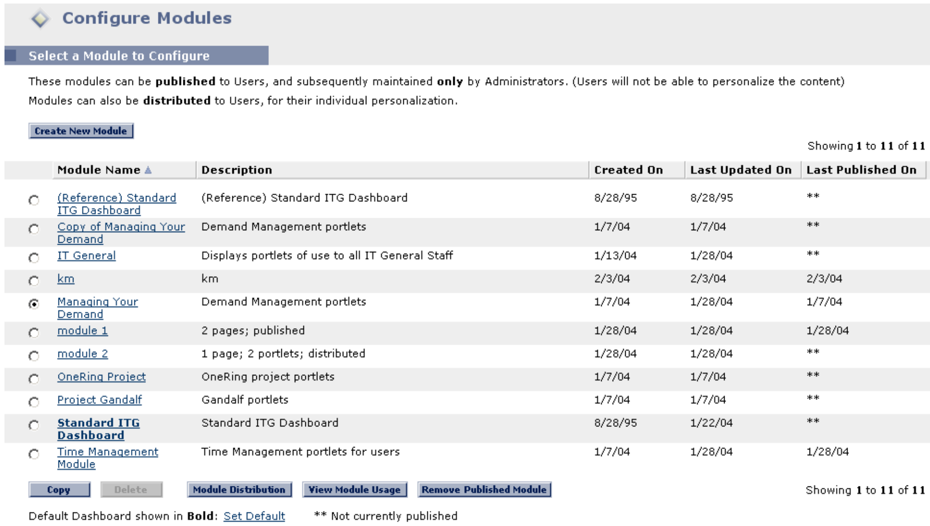
   The edits to the Portlet are saved to the Module.

Copying a Module

To copy an existing Module:

1. Open the Configure Modules page.

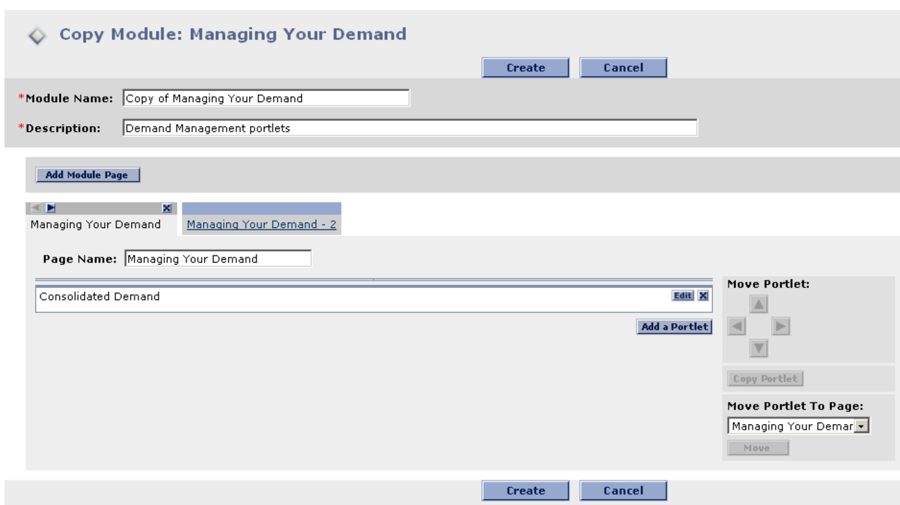
   For more information, see *"Searching for a Module"* on page 57.



2. Select the radio button next to the Module.

3. Click **Copy**.

   The Copy Module page opens.



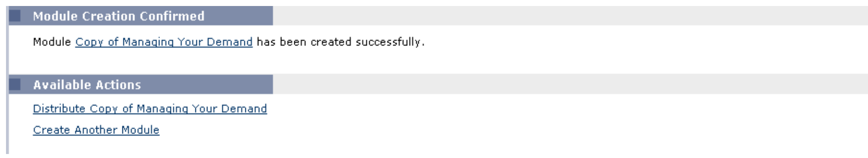
4. In the Module Name field, enter the name of the new (copied) Module.

5. In the Description field, enter a description of the new (copied) Module.

6. Edit the Module by adding additional Module pages or Portlets.

7. Click **Create**.

   The Module is created and the Module Creation Confirmed page opens.



Note

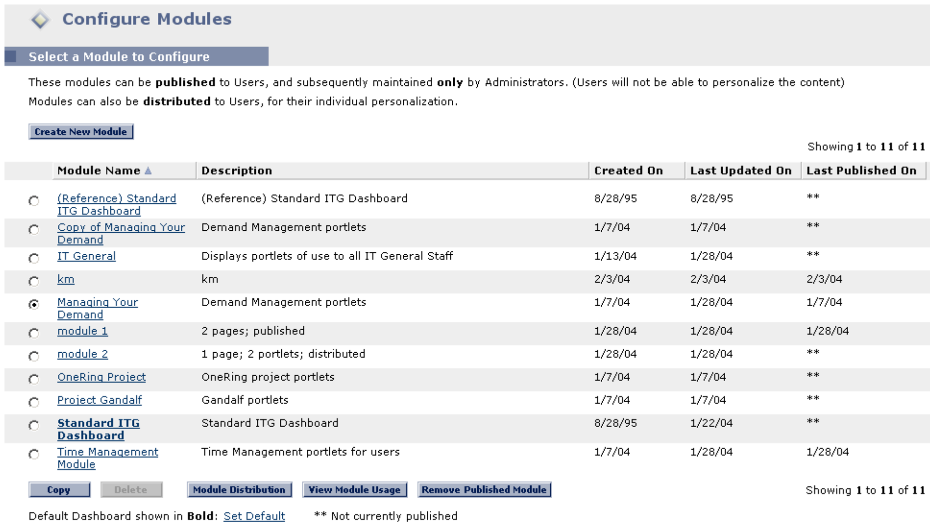
You can also copy a Module from the Configure Module page.

Deleting a Module

This section provides instructions on deleting an existing Module. Only Modules that are not currently published can be deleted.

To delete an existing Module:

1. Open the Dashboard.
2. From the menu bar, select **Administration > Dashboard Distribution > Configure Modules**.
3. Enter the search criteria and click Search to display a list of Modules.
4. Select the radio button next to the Module.



3. Click **Delete**.

   A popup confirmation window opens.

4. Click **Yes** to confirm the deletion.

   The Module is deleted.

Note

If the Module is currently published, the Module cannot be deleted. For more information, see *"Publishing Modules"* on page 6.

You can also delete a Module by clicking on the Module's name and going to the Module Configuration page.

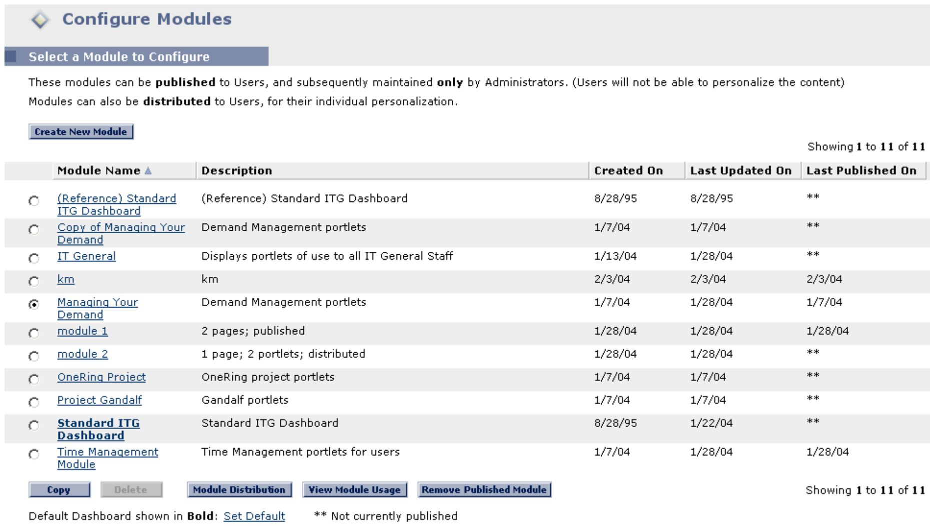
Viewing a Module's Usage

You can view the usage of a Module. For each Module, you can see which users have included the Module to their Dashboards.

View a Module's usage:

1. Open the Configure Modules page.

   For more information, see *"Searching for a Module"* on page 57.



2. Select the radio button next to the Module.

3. Click **View Module Usage**.

The View Module Usage page opens. This page displays pertinent information regarding the Module, including:

- The last day the Module was published.
- The Dashboard pages and Portlets belonging to the Module.
- The users that currently have the Module on their Dashboards.

4. Click **View Full List** to see the entire list of users who currently have the Module published to their Dashboards.

   The All Impacted Users page opens. The All Impacted Users page displays up to 100 impacted users at a time. Use the **Prev** and **Next** buttons to move forwards and backwards on the All Impacted Users page.

Note: You can also view a Module's usage by clicking on the Module's name and clicking **View Module Usage**.

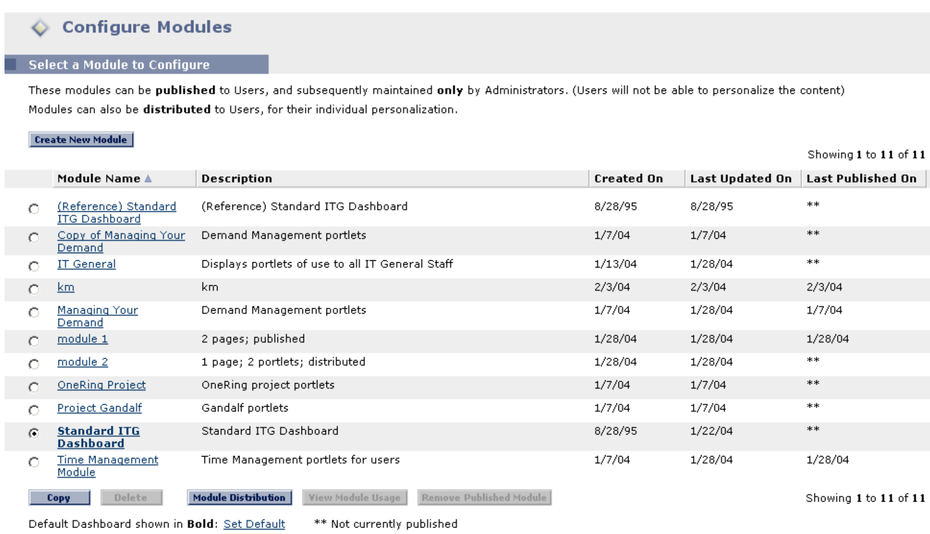
Setting the Default Dashboard

This section details how to set one Module as the Default Dashboard. The Default Dashboard page is the first page seen the first time a user opens the Dashboard. Users with the Administrator license, Sys Admin, Configure Module and Sys Admin, Distribute Module Access Grants can configure and disseminate the Default Dashboard to all users.

To set the Default Dashboard:

1. Open the Configure Modules page.

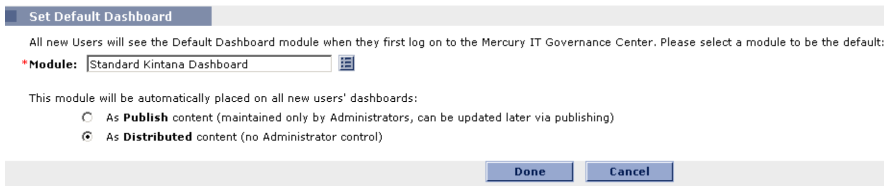
   For more information, see *"Searching for a Module"* on page 57.



2. Select the Module.

3. Click **Default Dashboard: Set Default**.

   The Set Default Dashboard page opens.



4. Choose the method of dissemination.

   The default Dashboard can be disseminated two different ways:

   - **As Published content (Administrative control maintained)**
   - **As Distributed content (No administrative control)**

5. Click **Done**.

   The Default Dashboard Module is set.

Chapter
6
Distributing Modules

This chapter details the concepts and processes associated with the distribution of Mercury IT Governance Dashboard pages and Portlets to one or many user Dashboards.

This chapter covers the following topics:

Module Publication Rules

The following are the Module publishing rules:

- To publish a Module, an application administrator or user must have the Administrator license and the Sys Admin: Distribute Module Access Grant permission.
- The Dashboard pages and Portlets of a published Module cannot be edited by the owner of the Dashboard.
- Published Modules can be tracked by the application administrator.
- Published Modules can be removed by the application administrator.

Module Distribution Rules

The following are the Module distributing rules.

- Modules, individual Dashboard pages and individual Portlets can be distributed.
- Distributed Dashboard pages and Portlets (as part of a Module or distributed separately) can be edited.
- Distributed Dashboard pages, Portlets and Modules are added to a Dashboard.
- Distributed Modules, Dashboard pages and Portlets cannot be tracked by the application administrator.
- Distributed Modules, Dashboard pages and Portlets cannot be removed by the application administrator.
- A published Module will not be overwritten by an updated version of the distributed Module.

Publishing Modules

This section provides an overview on how to publish a Module. Publishing is a regimented approach to disseminating Portlets and Dashboard pages. Only Modules can be published. For a list of rules concerning Module publishing, see *"Module Publication Rules"* on page 75.

The main steps required to publish a Module are:

- Content Setup
- User Setup
- Preview
- Finish

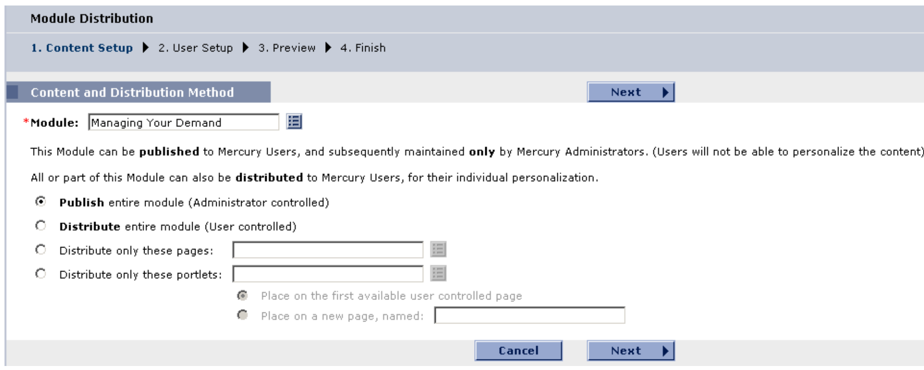
Publishing a Module

To publish a Module:

1. Open the Dashboard.

2. From the menu bar, select **Administration > Dashboard Distribution > Module Distribution**.

   The Module Distribution page opens.



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

4. Select Publish this Module (Administrator controlled).

5. Click **Next**.

6. In the Select Recipients of Publication section, select the users and groups receiving the Module.

   Multiple entries from multiple categories are allowed. At least one entry in one field is required. Impacted users selected multiple times receive only one publication. The fields for this page are listed in *Table 6-1*.

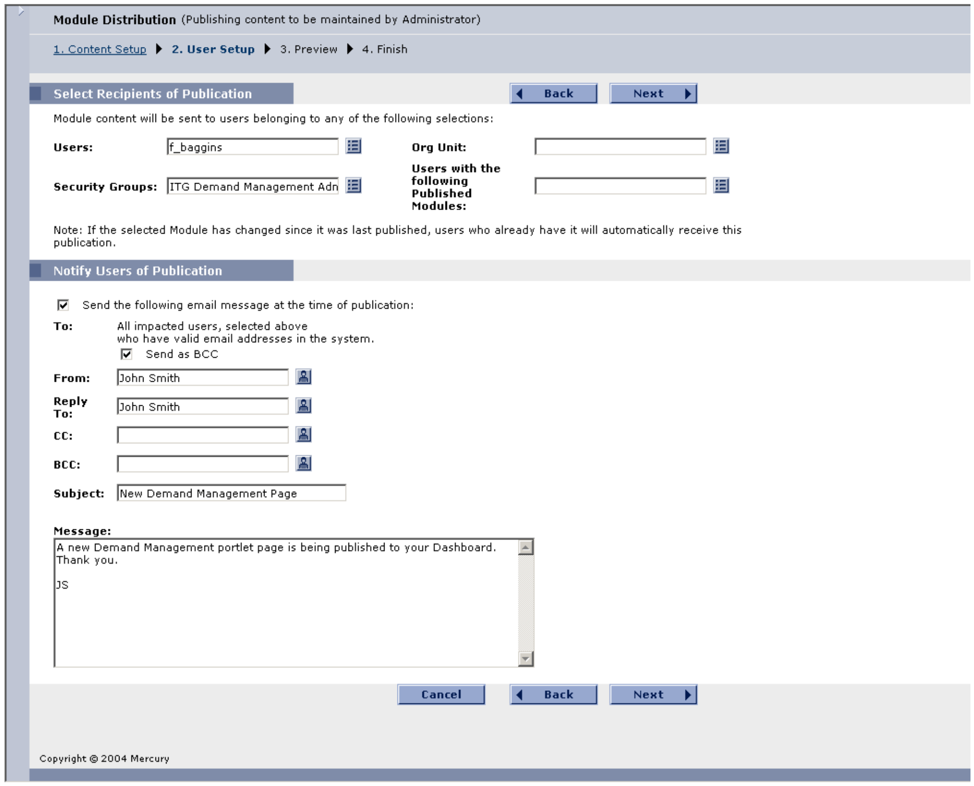


Table 6-1. Select Recipients of Distributed Contents fields

Field	Definition
Users	Specify the user or users.
Security Groups	Specify the Security Group or groups. All users belonging to the specified Security Groups receive the published Module.
Org Units	Specify the Organization Unit or units. All users belonging to the specified organizational units receive the published Module.
Users with the following Published Modules	Specify the published Module or Modules. All users currently having the specified Modules receive the published Module.

7. In the Notify Users of Publication section, select the users that will receive an email alert concerning the publication.

a. If an email is to accompany the publishing of the Module, select **Send the following email message at the time of publication** under the Notify User of Publication heading.

By default, all recipients of the publication are sent the email. Selecting this option enables the remaining fields under the Notify User of Publication heading. The To field is automatically filled with the impacted users selected under the Select Recipients of Publication heading.

The Send as BCC is selected (each user only sees their own email address). De-select Send as BCC if the impacted users are to see the entire distribution list.

b. Fill in the remaining fields of the Notify Users of Publication section as listed in *Table 6-2*.

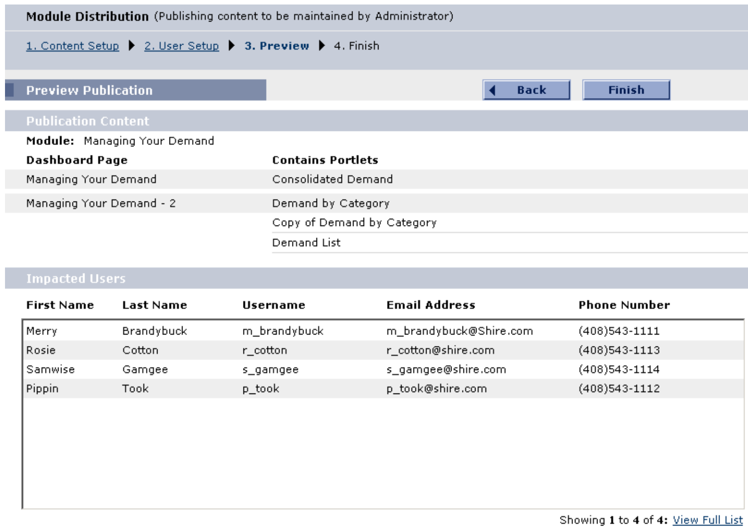
Table 6-2. Notify Users of Publication fields

Field	Definition
From	Specify the email address shown in the From field. The default is the current username. If the current user does not have an email address, the field is empty.
Reply To	Specify the email address shown in the Reply To field. The default is the current username. If the current user does not have an email address, the field is empty.
CC	Specify the email address shown in the CC field. This field is for notification purposes only.
BCC	Specify the email address shown in the BCC field. This field is for notification purposes only. The entire To email address list is included.
Subject	Specify the title or subject of the email.
Message	Include a brief message regarding the publishing.

8. Click **Next**.

The page proceeds to the Preview step. The current selection of Module, recipients and email details are displayed.

In the Impacted Users section, the users are listed. To view the complete list of users, click **View Full List**. The All Impacted Users page opens. To close the All Impacted User page, click **Close Window**. The Preview Publication section of the Module Distribution page opens.



9. Click **Finish** to publish the Module.

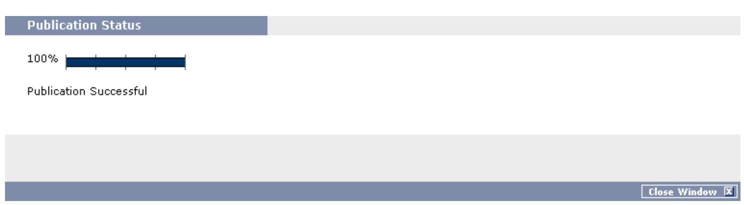
   The Module is published and the Publication Status page opens in a new window. The Publication Status page displays the progress of the publication.

10. Check the Publication Status page.

    Verify if the publication was successful.

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

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



Distributing Modules

This section provides an overview on how to distribute a Module. Distributing provides a flexible approach to disseminating Portlets and Dashboard pages. Distributing allows the dissemination of individual Portlets, Dashboard pages and Modules. Distributed Portlets, Dashboard pages and Modules are not tracked and cannot be removed by the application administrator. For a list of rules concerning Module distribution, see *"Module Distribution Rules"* on page 76.

The main steps required to distribute a Module are:

- Content Setup
- User Setup
- Preview
- Finish

Distributing a Module

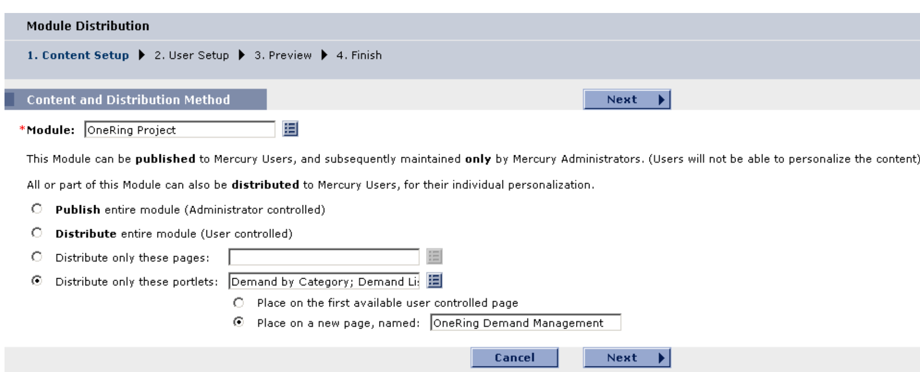
Once a Module, Dashboard page or Portlet is fully configured, it can be distributed.

To distribute a Module, page or Portlet:

1. Open the Dashboard.

2. From the menu bar, select **Administration > Dashboard Distribution > Module Distribution**.

   The Module Distribution page opens.



3. In the Module field, enter the name of the Module to be distributed.

4. Select one of the methods of distribution.

   - **Distribute entire Module (User controlled)**
     To distribute the entire Module.

   - **Distribute only these pages**
     To distribute a page or pages from the Module. Enter the pages in the accompanying field. Click the auto-complete list icon ( ) for a listing of all pages in the Module.

   - **Distribute only these Portlets**
     To distribute a Portlet or Portlets from the Module. Enter the Portlets in the accompanying field. Click the auto-complete list icon ( ) for a listing of all Portlets in the Module.

     o **Place on the first available user controlled page**
       To place the selected Portlets on the user's existing home page.

     o **Place on a new page, named**
       To place the selected Portlets on a new page. In the adjacent field, fill in the name of the page.

5. Click **Next**.

   The User Setup page open.

6. In the Select Recipients of Distributed Content section, select the users and groups receiving the Module. *Table 6-3* defines the fields of the User Setup page.

   Multiple entries from multiple categories are allowed. At least one entry in one field is required. Impacted users selected multiple times receive only one publication.

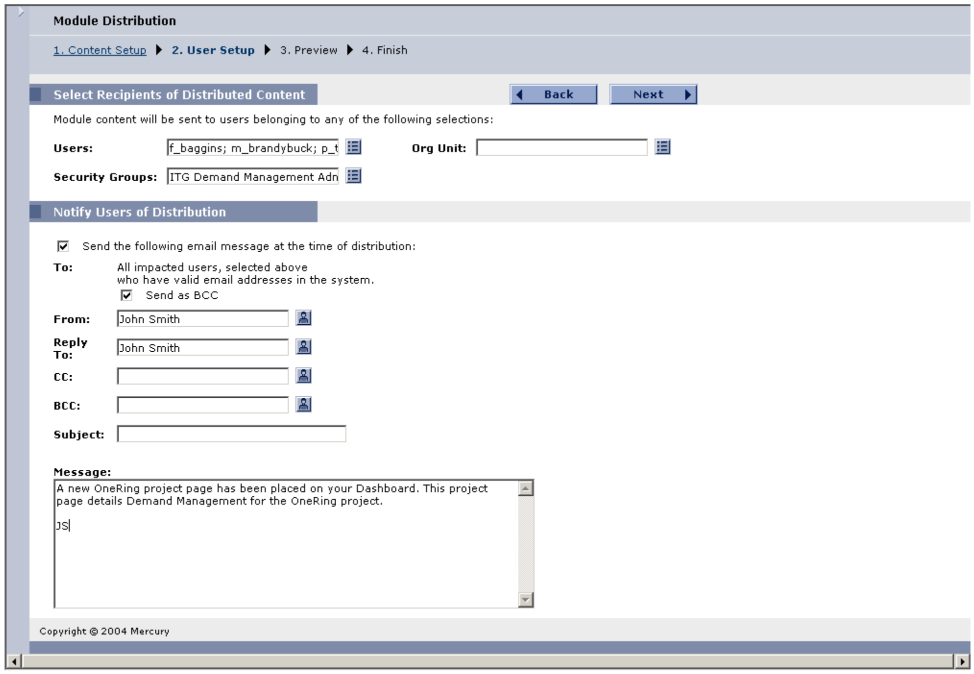


Table 6-3. Select Recipients of Distributed Contents fields

Field	Definition
Users	Specify the user or users.
Security Groups	Specify the Security Group or groups. All users belonging to the specified Security Groups receive the published Module.
Org Units	Specify the Organization Unit or units. All users belonging to the specified organizational units receive the published Module.

7. In the Notify Users of Publication section, select the users that will receive an email alert concerning the publication.

    a. If an email is to accompany the publishing of the Module, select **Send the following email message at the time of publication** under the Notify User of Publication heading.

    By default, all recipients of the publication are sent the email. Selecting this option enables the remaining fields under the Notify User of

Publication heading. The To field is automatically filled with the impacted users selected under the Select Recipients of Publication heading.

The Send as BCC is selected (each user only sees their own email address). De-select Send as BCC if the impacted users are to see the entire distribution list.

b. Fill in the remaining fields of the Notify Users of Publication section as listed in *Table 6-2*.

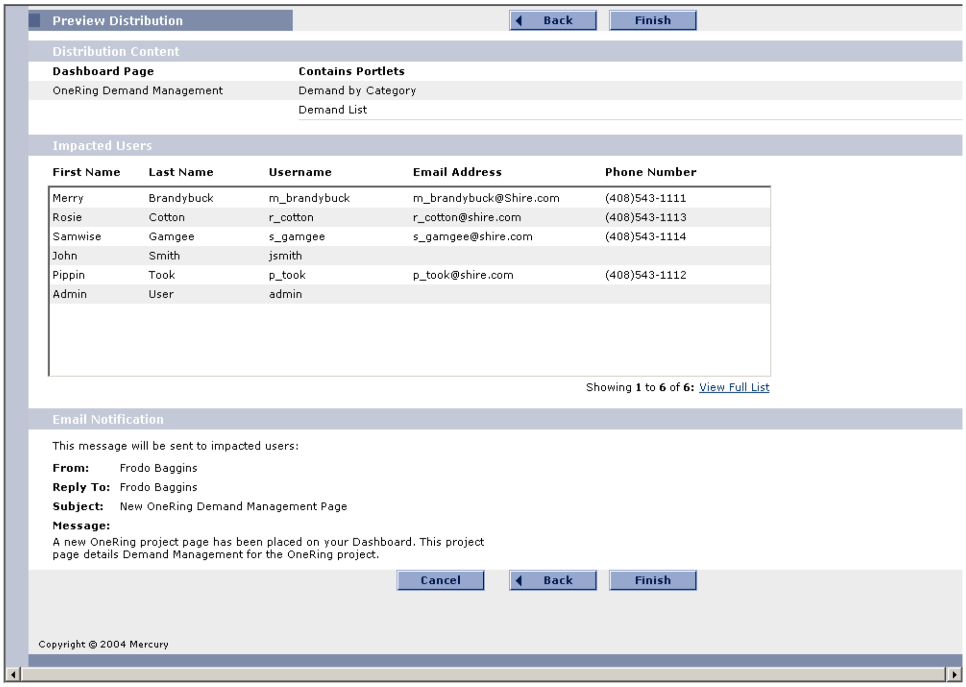
Table 6-4. Notify Users of Publication fields

Field	Definition
From	Specify the email address shown in the From field. The default is the current username. If the current user does not have an email address, the field is empty.
Reply To	Specify the email address shown in the Reply To field. The default is the current username. If the current user does not have an email address, the field is empty.
CC	Specify the email address shown in the CC field. This field is for notification purposes only.
BCC	Specify the email address shown in the BCC field. This field is for notification purposes only. The entire To email address list is included.
Subject	Specify the title or subject of the email.
Message	Include a brief message regarding the publishing.

8. Click **Next**.

   The page proceeds to the Preview step. The current selection of Module, recipients and email details are displayed.

   In the Impacted Users section, the users are listed. To view the complete list of users, click **View Full List**. The All Impacted Users page opens. To close the All Impacted User page, click **Close Window**. The Preview Publication section of the Module Distribution page opens.



9. Click **Finish** to publish the Module.

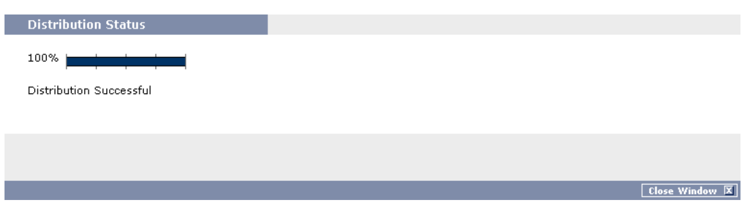
   The Module is published and the Publication Status page opens in a new window. The Publication Status page displays the progress of the publication.

10. Check the Publication Status page.

    Verify if the publication was successful.

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

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



Removing Published Modules

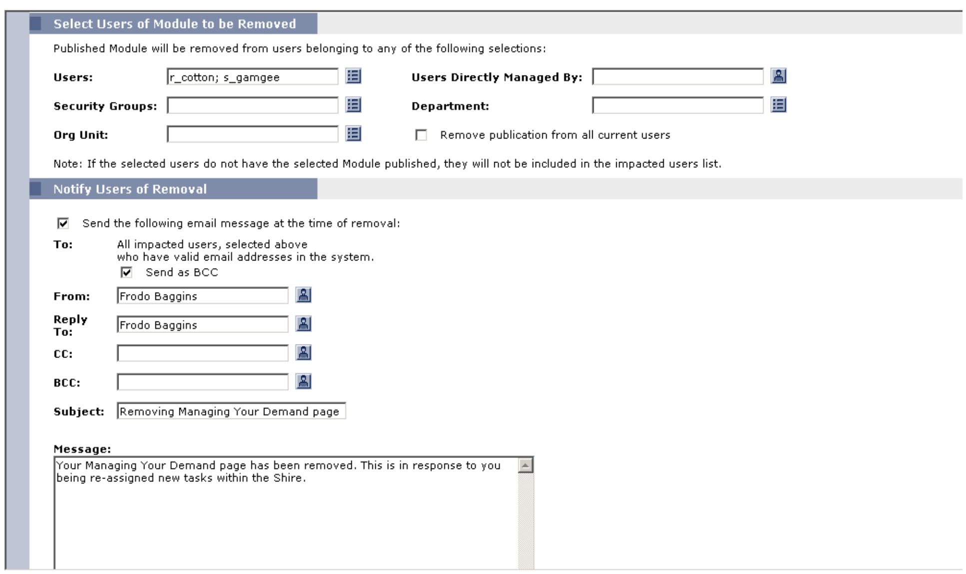
This section provides an overview on how to remove a published Module from a user's Dashboard. Only published Modules can be removed from Dashboards. Distributed Modules, pages and Portlets are not tracked and cannot be removed from Dashboards.

Removing a Published Module

To remove a Module from a User's Dashboard:

1. Open the Dashboard.
2. From the menu bar, click **Administration > Dashboard Distribution > Remove Published Module**.

   The Remove Published Module page opens.



3. From the Module field of the Select Module section, select the name of the Module.

4. In the Select Users to Remove Content section, select the users and groups who will have the Module removed from their Dashboard.

5. In the Notify User of Removal section, set up the email message accompanying the removal.

   a. If an email is to accompany the distribution, select **Send the following email message at the time of publication**.

      Selecting this option enables the remaining fields under the Notify User of Removal heading. The To field is automatically filled with the impacted users selected under the Select Recipients of Remove Content heading.

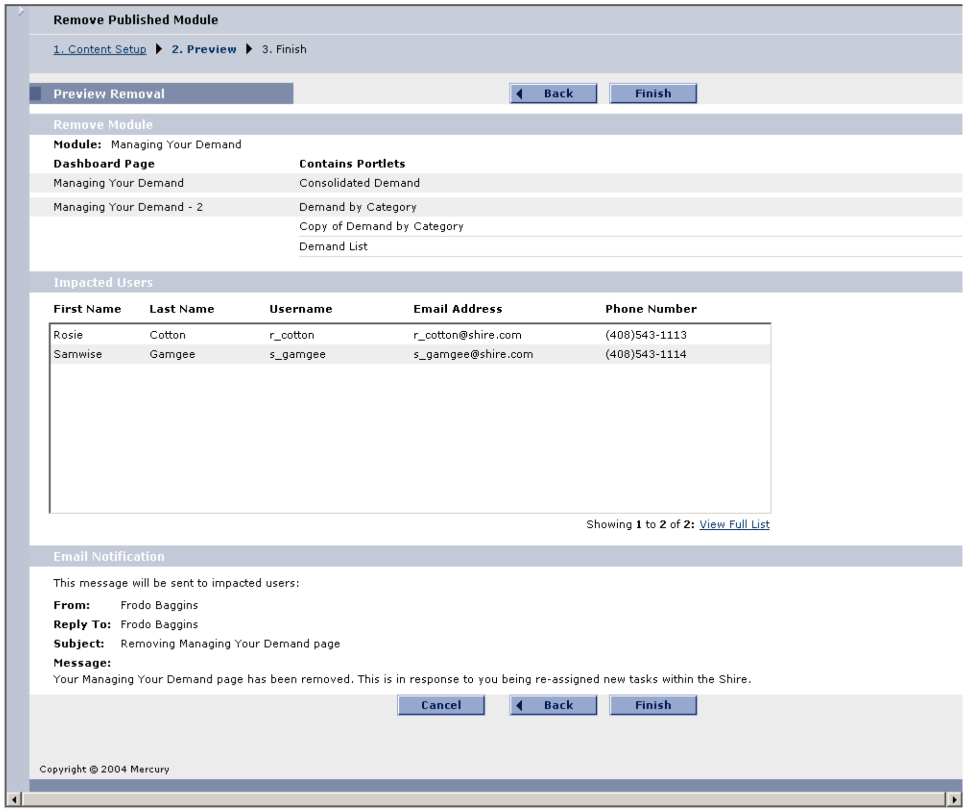
      By default, the Send as BCC is selected (each user only sees their own email address).

   b. De-select the checkbox next to Send as BCC if the impacted users are to see the entire email list.

   c. Fill in the remaining fields as listed in *Table 6-4 on page 84*.

6. Click **Next**.

   The Preview Step page opens.



7. Click **Finish** to remove the Module.

The Module is removed and a new window with the Removal Status page opens. The Removal Status page displays the progress of the removal.

If the Preview Removal section of the Remove Published Module page is not correct, click **Back** to return to the Select Recipients of Removal and Notify Users of Removal sections of the Remove Published Module page or **Cancel** to stop the removal. If the removal was not successful, a list of users not having the Module removed is returned. Users might not have a Module removed because the workstation is off-line.Click **Remove** to remove the Module from the list of failed users.

Appendix A System Portlets

System Portlets are the Portlets delivered with the Mercury IT Governance Center product installations. Each ITG product includes a number of Portlets that provide visibility into product-specific data. This appendix lists the Portlets that are delivered with each Mercury ITG product.

This appendix covers the following:

- Mercury Financial Management Portlets, listed in *Table A-1 on page 90*
- Mercury Change Management Portlets, listed in *Table A-2 on page 91*
- Mercury Demand Management and Request Portlets, listed in *Table A-3 on page 92*
- Mercury Portfolio Management Portlets, listed in *Table A-4 on page 94*.
- Mercury Program Management Portlets, listed in *Table A-5 on page 95*.
- Mercury Project Management Portlets, listed in *Table A-6 on page 96*.
- Mercury Project Management (Project Overview) Portlets, listed in *Table A-7 on page 99*
- Mercury Resource Management Portlets, listed in *Table A-8 on page 100*
- Mercury Time Management Portlets, listed in *Table A-9 on page 101*

Note

Some users cannot view and access all Portlets. Portlet access depends on:

- Product licenses.
- Appropriate Security Group setting.

Table A-1. Financial Management Portlets

Financial Management Portlets	Description
Budget To Budget Comparison	Displays a Budget to Budget Comparison bar chart. Allows a comparison of one or more Allocation Budgets to one or more Allocated Budgets. This allows users to compare one budgeted Allocation to another.
Cumulative Cost Metrics (Program)	Displays a trend chart analyzing the cumulative cost metrics for a Program. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Cumulative Cost Metrics (Project)	Displays a trend chart analyzing the cumulative cost metrics for a Project. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Current Cost Metrics (Program)	Displays an analysis of the Current Cost Metrics for a Program. Displays a bubble chart analyzing the current cost metrics for a Program. The bubble chart can be used to show current cost status of a Project or current cost status of a Program.
Current Cost Metrics (Project)	Displays an analysis of the Current Cost Metrics for a Project. Displays a bubble chart analyzing the current cost metrics for a Project. The bubble chart can be used to show current cost status of a Project or current cost status of a Program.
Project Cost Summary	Displays a list of cost information for a Project.

Table A-2. Change Management Portlets

Change Management Portlets	Description
My Packages	Displays all Packages created by or assigned to the current user. Users can drill down on any Package to view its details, such as the Workflow status and Package Lines. This Portlet provides a critical view into the most pressing Packages.
Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Users can drill down on any Object Type or Environment to view the included Packages.
Package List	Displays general information about Packages, such as their description and status. This Portlet can be personalized to display information based on various Package related criteria. This enables users to display only the Packages relevant to their personal activities.
Package List (Expanded)	Displays general information about Packages, such as their description and status. This Portlet can be filtered for the same Package criteria as the Package List Portlet, but displays more detailed Package information on the Dashboard.
Package Reference	Displays the References attached to the Package based on filters such as Reference Types, Relationship, and the time period when they were added.
Package Summary Bar Chart	Displays information in the form of a bar chart about groups of Packages, including priority, ‘Assigned To’ user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages comprising the group’s total number.
Package Summary Pie Chart	Displays information in the form of a pie chart about groups of Packages, including priority, ‘Assigned To’ user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages comprising the group’s total number.

Table A-2. Change Management Portlets [continued]

Change Management Portlets	Description
Pending Deployment	Displays general information about Packages which have not been deployed. This Portlet provides visibility into scheduled or required Package migration.

Table A-3. Demand Management and Request Portlets

Demand Management Portlets	Description
Assignment Queue	Provides a personalized view into the Demand not assigned to a resource. This Portlet assigns a user as a resource to a Request.
Consolidated Demand	Provides a graphical overview of the Demand placed on an organization.
Demand by Category	Provides a quick view into different areas of Demand. This Portlet provides a quick, graphical Demand summary and can be grouped by Department, Demand Type, Priority, etc.
Demand List	Provides a personalized list of the demand placed on an organization or individual. This Portlet can be personalized to display demand filtered based on specified criteria (Demand Type, Priority, Demand Disposition, etc.)
My Requests	Displays all Requests created by or assigned to the current user. This Portlet provides a critical view into the most pressing Requests and nearing deadlines.
Open Requests by Priority	Displays a bar chart of the number of Requests currently open, grouped by priority. This Portlet provides a graphical representation to help the user visualize and group a business' open issues.
Request Activity	Displays general activity information such as the number of Requests opened and closed during the last two weeks, and the number of open Requests. This Portlet provides visibility into high traffic Request Types as well as the groups or users assigned to address them.

Table A-3. Demand Management and Request Portlets [continued]

Demand Management Portlets	Description
Request List	Displays general information about Requests, such as their description and status. This Portlet can be personalized to display information based on specific Request numbers or other Request related criteria. This enables users to display only the Requests relevant to their personal activities.
Request List (Expanded)	Displays general information about Requests, such as their description and status. This Portlet can be filtered for the same Request criteria as the Request List Portlet, but displays more detailed Request information.
Request References	Displays the References attached to the Request based on filters such as Reference Types, Relationship, and the time period when they were added.
Request Summary	Displays information about groups of Requests, including priority, type, status and the total number of Requests for each category. Users can drill down on any group of Requests and individual Requests of the group's total number.
Request Summary Bar Chart	Displays a bar chart allowing users to easily see rolled up information about Requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests the bar represents.
Request Summary Pie Chart	Displays as a pie chart information allowing users to easily see rolled up information about Requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests the bar represents.
SLA Exception Roll Up	Lists the open Requests triggering SLA exceptions. The Service Level Agreements are configured using Request Type rules. The Portlet displays the active SLAs related to a Demand, highlighting the violations in red.

Table A-4. Portfolio Management Portlets

Portfolio Management Portlets	Description
Current Portfolio Map Portlet	The Current Portfolio Map Portlet displays a configurable bubble chart representing the Projects and Assets currently active.
Portfolio by Category Portlet	The Portfolio by Category Portlet can be used to analyze aggregate financially-significant values of your Portfolio's contents, including Budget, Financial Benefit, NPV, and ROI.
Resource by Category Portlet	The Resource by Category Portlet allows users to perform a by-period comparison of resource requirements and availability in the Portfolio.
Total Budget Portlet	The Total Budget Portlet shows the total Budget each scenario in a specified Scenario Comparison will consume per period. The Portlet also displays the total Budget available, if one is specified in the Scenario Comparison being referenced.
Total Resource Portlet	The Total Resource Portlet displays the total Resource demand per period of each scenario in a specified Scenario Comparison. The Portlet also displays the total available Resources, if specified in the selected Scenario Comparison.
Budget Summary Portlet	The Budget Summary Portlet provides a graph of the Budget information for each scenario in a specified Scenario Comparison. Each graph displays Capital and Operating expense in a stacked bar chart. If there is a total available Budget specified for the Scenario Comparison, it is displayed as the capacity line.
Cost Benefit Analysis Portlet	The Cost Benefit Analysis Portlet provides a graph illustrating the cost/benefit analysis for each scenario. The graph consists of a bar chart depicting the expected cost per period, as well as the expected benefit.
Budget by Asset Class Portlet	The Budget by Asset Class Portlet provides a graph illustrating the Budget by Asset Class per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Asset Class) in each period.

Table A-4. Portfolio Management Portlets [continued]

Portfolio Management Portlets	Description
Budget by Project Class Portlet	The Budget by Project Class Portlet provides a graph illustrating the Budget by Project Class per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Project Class) in each period.
Budget by Business Objective Portlet	The Budget by Business Objective Portlet provides a graph illustrating the Budget by Business Objective per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Business Objective) in each period.

Table A-5. Program Management Portlets

Program Management Portlets	Description
Program Cost Summary	Displays an overview of the Project cost health. Cost overview summarizes labor, non-labor and total expenses set against baseline, planned and actual costs. The Earned Value Summary includes the Planned Value, Sched Variance, Earned Value, Cost Variance, Actual Cost, SPI and CPI.
Program Issue List	Displays a list of Program Issues. This Portlet can be personalized to display Issues based on Project, escalation level, priority, status or other Program related criteria. This enables users to display only the Programs that are relevant to their personal activities.
Program List	Displays general information about Programs, such as Program priority, Program state and Issues. This Portlet can be personalized to display information based on Program Name or other Project related criteria. This enables users to focus on and display only the most relevant Program data.

Table A-5. Program Management Portlets [continued]

Program Management Portlets	Description
Program Project List	Displays the Project List of a Program. The Portlet is configured with default parameters to show all Project items for the Program so that the Portlet can be used without personalizing the Portlet. The Project items are sorted by the Project hierarchy and optionally, by name, resource, state, scheduled finish, and Project hierarchy.
Program Resource Request List	Displays a list of Program resource Requests. This Portlet can be personalized to display Program Resource Requests based on, priority, status, assigned to and assigned to group. This enables users to display only the Resource Requests that are relevant to their personal activities.
Program Risk List	Displays a list of Program Risks. This Portlet can be personalized to display Risks based on Project, escalation level, priority, probability, impact level or other Program related criteria. This enables users to display only the Program Risks that are relevant to their personal activities.
Program Scope Change List	Displays the List of a Program's Scope Changes. The sequence, Tasks and Project name are displayed, as well as the values for the Project and baseline pair selected of the four schedule fields. The four fields are: Scheduled Start, Scheduled Finish, Scheduled Duration and Scheduled Effort.

Table A-6. Project Management Portlets

Project Management Portlets	Description
My Tasks	Displays all Project Tasks currently assigned to the user having a scheduled finish date two weeks from the current date.This Portlet provides a critical view into the most pressing Tasks and nearing deadlines.

Table A-6. Project Management Portlets [continued]

Project Management Portlets	Description
Project Budget and Staffing Profile vs. Actuals	Displays a summary of Project performance relative to budgetary constraints. Values are for the entire Project to date. This Portlet is intended to provide Dashboard-level oversight into the status of a group of Projects. The intended audience is PMO staff or external stakeholders. Budgeted values for cost and hours are drawn from a Budget, not from a Project baseline. Actuals for cost are gathered from the Budget. Actuals for hours are aggregated from Tasks assignments and Tasks actuals on the Project linked to the Budget. Percent complete is similarly drawn from the Project actuals.
Project Cost Summary	Displays a list of cost information for a Project if the Project has Financial Management setting enabled. This Portlet information is restricted if the user do not have the appropriate cost security.
Project Exception Detail	Displays information about the current Project's exceptions, stating the Violation, Tasks State, Start and Finish Dates, and the assigned Resource.
Project Exception Summary	Displays relevant exception information about the Project. Exception rules are configured by the Project Manager using the Project Management Workbench. The Portlet is configured with default parameters to show all exceptions for the Project so the Portlet can be used without personalizing the Portlet.
Project Gantt	Displays a Gantt chart for all Projects assigned to resources. The default values show Projects scheduled for the next two weeks.
Project List	Displays general information about Projects, such as how close they are to completion and their scheduled finish date. This Portlet can be personalized to display information based on Project Name or other Project related criteria. This enables users to focus on and display only the most relevant Project data.

Table A-6. Project Management Portlets [continued]

Project Management Portlets	Description
Project List (Expanded)	Displays general information about Projects, such as how close they are to completion and their scheduled start and finish date. This Portlet can be filtered for the same Project criteria as the Project List Portlet, but displays more detailed information on the Dashboard.
Project Milestones	Displays a list of milestones within a Project. The Portlet is configured with default parameters to show all milestones for the Project so the Portlet can be used without personalizing the Portlet.
Project Overview Gantt	Displays a Gantt chart in the Project Overview page.
Project References	Displays the References attached to the Project based on Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks. The Portlet is configured with default parameters to show all References for the Project so the Portlet can be used without personalizing the Portlet.
Project Related Actions	Displays links to related Assignments and Staffing Profiles.
Project Summary	Provides a quick status for the selected Project or Subproject, including information on the Project State, Percent Complete, Project Manager and Start and Finish Dates.
Project Summary Pie Chart	Displays a pie chart that rolls up a group of Projects and displays them grouped by their summary condition. Users have the option to either select a set of specific Projects and Subprojects, or filter by Department and/or Project Manager fields.
Resource Gantt	Displays a Gantt chart for all work items assigned to resources. Work items are differentiated by color, with Tasks remaining the same color as in the Project Gantt chart and Requests being a different color. The default values show Tasks and Requests scheduled for the next two weeks. The work items are labeled by having the resource displayed to the right of the work item. This is necessary if there are multiple resources or a resource group specified.

Table A-6. Project Management Portlets [continued]

Project Management Portlets	Description
Subprojects and Tasks Summary	Displays information about the current Project's Subprojects and Tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Table A-7. Project Management (Project Overview) Portlets

Project Overview Portlets	Description
Project Cost Summary	Displays a list of cost information for a Project if the Project has Financial Management setting enabled. This Portlet information is restricted if the user do not have the appropriate cost security.
Project Exception Detail	Displays information about the current Project's exceptions, stating the Violation, Tasks State, Start and Finish Dates, and the assigned Resource.
Project Exception Summary	Displays relevant exception information about the Project. Exception rules are configured by the Project Manager using the Project Management Workbench. The Portlet is configured with default parameters to show all exceptions for the Project so that the Portlet can be used without personalizing the Portlet.
Project Milestones	Displays a list of milestones within a Project. The Portlet is configured with default parameters to show all milestones for the Project so that the Portlet can be used without personalizing the Portlet.
Project References	Displays the References that are attached to the Project based on Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks. The Portlet is configured with default parameters to show all References for the Project so that the Portlet can be used without personalizing the Portlet.
Project Related Actions	Displays links to related Assignments and Staffing Profiles.

Table A-7. Project Management (Project Overview) Portlets [continued]

Project Overview Portlets	Description
Project Summary	Provides a quick status for the selected Project or Subproject, including information on the Project State, Percent Complete, Project Manager and Start and Finish Dates.
Subprojects and Tasks Summary	Displays information about the current Project's Subprojects and Tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Table A-8. Resource Management Portlets

Resource Management Portlets	Description
Analyze Assignment Load	Compares capacity (Resource Calendars X Resource Workload Capacity) to assignments (Requests, Tasks, and staffing profiles) marked on “treat as assignments.” It is used to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Analyzes the Resource Pools. This Portlet compares capacity (active Resource Pools) to load (lines on active staffing profiles drawing from these Resource Pools). The Portlet is used to assess planned load on Resource Pools, in support of strategic resource planning.
Compare Project and Staffing Profile	Compares a Project to the staffing profile. This Portlet compares capacity (as the set of active staffing profiles for a Project) to assignments within the Project. The Portlet is used either by the Project manager or by resource managers in charge of planning staffing profiles to monitor compliance of the Project plan and actuals to organizationally agreed staffing levels for the Project.
Current Resource Load by Organization	Displays the current resource load by Organization. Organization unit or skill name is a link to the related detail page. Note that to support breakdowns it is desirable to sort the list by organization hierarchy structure.

Table A-8. Resource Management Portlets [continued]

Resource Management Portlets	Description
Current Resource Load By Skill	Displays the current resource load by skills. This Portlet displays a snapshot of current load on a set of resources, broken down by the skill booked on the work item. Note that when skill is not specified during the booking process, it will default to the resource's primary skill.
Resource Assignment	Displays a list of assigned resources and their related assignments and statues including: Open Tasks, Task Effort, Open Reqs and Open Pkgs.
Resource Pool List	Displays a list of Resource Pools. Listings include following columns: Resource Pool, Resource Pool is for, Status, Active, Start and Finish. Columns are configurable.
Staffing Profile List	Displays staffing profiles. This Portlet allows flexible filtering so the required set of staffing profiles can be drawn out and presented. Filters include: Specific staffing profile name(s), department, workload type, status (multi-select), start date after, finish date before, and total hours above.

Table A-9. Time Management Portlets

Time Management Portlets	Description
TMG - Actuals for Direct Reports	Displays the total time entered by all the direct reports for a specific manager or set of managers.
TMG - My Time Sheets	Displays the Time Sheets for the user during the last 10 time periods.
TMG - My Work Items	Displays all Work Items created by or assigned to the current user. This Portlet provides a critical view into the most pressing Work Items and nearing deadlines.

Table A-9. Time Management Portlets [continued]

Time Management Portlets	Description
TMG - Resource Group Total by Work Item	Displays a snapshot of current load on a set of teams. Teams are organization units. By selecting both a particular organization unit and also the organization units beneath this unit, it is possible to display a departmental summary and team breakdown. This Portlet is intended to provide Dashboard-level summary of upcoming load. The intended audience is PMO staff or middle managers (responsible for coordinating several teams).
TMG - Resource Group Totals	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, letting the user see the level of activity (by time) in the current and previous period for these groups.
TMG - Resource Totals	Displays the time charged by a set of resources, letting the user see the level of activity (by time) in the current and previous period for these users.
TMG - Total Hrs by Work Item	Displays detail information on the time allocated to and the time charged for specific Work Items. It shouldn't be used to display information for all Work Items but for a specific set based on filter criteria.
TMG - Work Allocation Details	Displays summary information on the defined Work Allocations. It is especially helpful to see which Allocations are close to being used up or actually are over budget.
TMG - Work Item Set Budgets 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 the users are spending the most time on as well as where the most time is budgeted. Values are for the entire Project to date (as opposed to period-by-period). This Portlet is intended to provide Dashboard-level oversight into the status of a group of Projects. The intended audience is PMO staff or external stakeholders. For this Portlet, the budgeted values for cost and hours are drawn from a Budget, not from a Project baseline. Actuals for costs are gathered from the Budget.

Appendix B
Example: Creating a Custom Portlet

This appendix provides a step-by-step procedure on how to create a custom **Request List** Portlet. This example Portlet shows all of the Internal IS Request type Requests assigned to or created by the Dashboard owner.

This appendix covers the following topics:

Before Building a Custom Portlet

Before building a custom Portlet, the user needs to know what information to display and how to display the information. The following provides some guidelines to help determine what information is required and how best to display that information:

- What type of information needs to be captured in this Portlet?

  For this example, Request Number, Request Type, Description, Created By User, Assigned User, Priority, Progress (which is a custom field on the Request type), and Current Condition (which is an item of Request User Data), will be displayed.

- What additional requirements are there? Are any visual indicators needed (hyperlinks, Tooltips)? Should the Request Numbers be hyperlinked, so users can click on the links to go to Request Detail pages directly. For this example:

- o The Progress field (a custom field) has a percentage as data. This will be displayed as progress bars for better visual representation.
- o For Created By Users and Assigned Users, Tooltips should include the user's full name and email address.
- o The field Current Condition (the Request User Data) has the values of Red, Yellow and Green. These will be displayed as colorful icons.

- What are the database columns for the information to display, and from which tables? This information bears most directly on the SQL query that will serve as the Portlet's "back end," retrieving and displaying data. What is the criteria necessary to link the database tables?
- What possible filter fields would end users find most helpful?

Visualizing the Portlet Query

This example Portlet takes information using the following SQL query:

```
SELECT R.REQUEST_ID REQUEST_ID,
   R.REQUEST_NUMBER REQUEST_NUMBER,
   R.DESCRIPTION DESCRIPTION,
   R.CREATED_BY_USERNAME CREATED_BY_USERNAME,
   R.ASSIGNED_TO_USERNAME ASSIGNED_TO_USERNAME,
   R.PRIORITY_MEANING PRIORITY,
   RD.VISIBLE_PARAMETER1 PROGRESS,
   R.USER_DATA5 CURRENT_ CONDITION,
   U1.FIRST_NAME || ' ' || U1.LAST_NAME || ', Email: ' ||
   U1.EMAIL_ADDRESS ASSIGNED_TO_USER_TOOLTIPS,
   U2.FIRST_NAME || ' ' || U2.LAST_NAME || ', Email: ' ||
   U2.EMAIL_ADDRESS CREATED_BY_USER_TOOLTIPS,
FROM  KCRT_REQUEST_DETAILS RD,
   KNTA_USERS U1,
   KNTA_USERS U2,
   KCRT_REQUESTS_V R
WHERE R.REQUEST_TYPE_NAME = 'Internal IS Request'
   AND RD.REQUEST_ID = R.REQUEST_ID
   AND R.BATCH_NUMBER = 1
   AND U1.USER_ID (+) = R.ASSIGNED_TO_USER_ID
   AND U2.USER_ID = R.CREATED_BY
   AND (R.ASSIGNED_TO_USER_ID = [SYS.USER_ID]
OR R.CREATED_BY = [SYS.USER_ID])
```

Note

In this example, the Request Type 'Internal IS Request' is being used. The VISIBLE_PARAMETER1 field is a custom field defined in the 'Internal IS Request' Request Type as the Request's progress. The VISIBLE_USER_DATA5 field is a User Data field defined in Request Type User Data to indicate the current status of the Request. A drop down list with values Red, Yellow and Green is used for this particular field.

Building the Custom Portlet Query

This section lists the steps required to create a custom Portlet. See *"Creating Custom Portlets"* on page 13 for more information on how to create a custom Portlet. For this example, the following two steps are combined:

- Build the Portlet SQL query.
- Define the columns displayed in the Portlet.

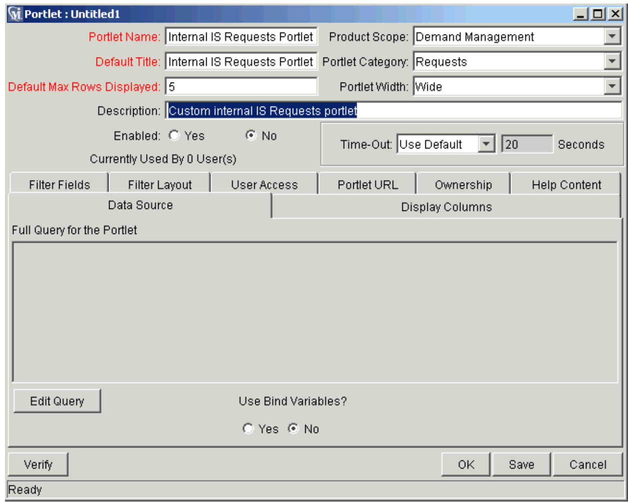
Also, some optional steps are not part of this example.

To build a custom Portlet:

1. Assign a name to the Portlet.
   a. Open the Workbench.
   b. Select **Dashboard > Portlets**.

      The Portlet Workbench opens.
   c. Click **New Portlet**.

      The Portlet window opens.

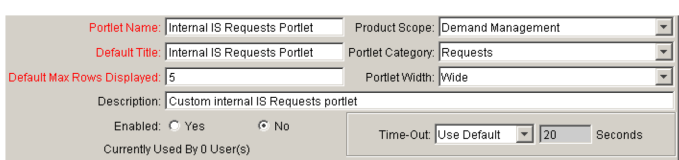


d. In the general information fields, enter the information provided in *Table B-1*.

Table B-1. Portlet General Information fields

Field	Information
Portlet Name	Internal IS Requests Portlet
Product Scope	Mercury Demand Management
Default Title	Internal IS Requests Portlet
Portlet Category	Requests
Default Max Rows Displayed	5
Portlet Width	Wide
Description	(any useful description)
Enabled	No
Timeout	Use Default

The general information fields should look like this:



e. Click **Save**.

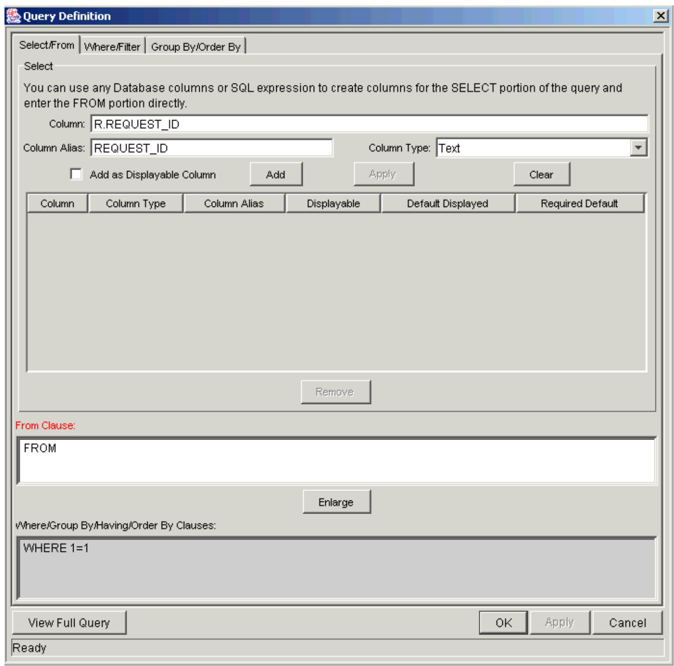
The edits to the Portlet window are saved.

2. Build the Portlet SQL query and define the columns displayed in the Portlet.

a. Click the **Data Source** tab.

b. Click **Edit Query**.

The Query Definition window opens.



c. Create the Portlet columns.

The type of column defines the procedure to follow to create the Portlet column. *Table B-2* lists all of the columns for this example, the type of column, and the table listing the parameters for each column.

Note

The user can **Apply** the newly created columns until data is added to the From Clause field.

Table B-2. Example Portlet Columns

Column Name and Type	Table Number
Request ID (Non-Displayed Column)	*Table B-3 on page 109*
Request Number (Displayed Column)	*Table B-4 on page 110*
Description (Displayed Column)	*Table B-5 on page 110*
Assigned to User Tooltips	*Table B-6 on page 111*
Created By User Tooltips	*Table B-7 on page 111*
Assigned User (Displayed Column)	*Table B-8 on page 112*
Created By (Displayed Column)	*Table B-9 on page 112*
Priority (Displayed Column)	*Table B-10 on page 113*
Progress (Displayed Column)	*Table B-11 on page 114*
Current Condition (Displayed Column)	*Table B-12 on page 114*

To add a non-displayed column:

i. At the top of the **Select/From** tab, fill in the fields.

   If the column is to be displayed in the Portlet. *Table B-3* through *Table B-12* provide the data to be entered in these windows.

ii. Click **Add**.

   The non-displayed column is added to the column list.

To add a displayed column:

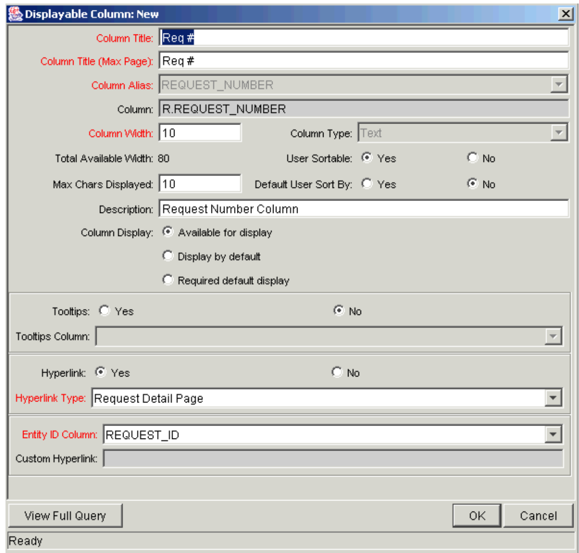
i. At the top of the **Select/From** tab, fill in the fields.

   Table B-3 through *Table B-12* provide the data to be entered in these windows

ii. Check **Add as Display Column**.

iii. Click **Add**.

   The Column Definition window opens.



iv. Fill in the appropriate fields.

Table B-3 through *Table B-12* provide the data to be entered in these windows.

v. Click **OK**.

The displayed column is added to the column list.

Note

Make sure to create the columns in the order that they appear in this document. Some column definitions are dependent on others preceding them.

Table B-3. Request ID (Non-Displayed Column)

Field	Information
Select/From Tab	
Column	R.REQUEST_ID
Column Alias	REQUEST_ID (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text
Add as Display Column	Unchecked

Table B-4. Request Number (Displayed Column)

Field	Information
Select/From Tab	
Column	R.REQUEST_NUMBER
Column Alias	REQUEST_NUMBER (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Req #
Column Title (Max Page)	Request No
Max Chars Displayed	10
Column Width	10
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Column Display	Available for display
Tooltips	No
Hyperlink	Yes
Hyperlink Type	Request Detail Page
Entity ID Column	REQUEST_ID

Table B-5. Description (Displayed Column)

Field	Information
Select/From Tab	
Column	R.DESCRIPTION
Select/From Tab	
Column Alias	DESCRIPTION (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Description

Table B-5. Description (Displayed Column) [continued]

Field	Information
Column Title (Max Page)	Description
Max Chars Displayed	12
Column Width	12
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

Table B-6. Assigned to User Tooltips

Field	Information
Select/From Tab	
Column	`U1.FIRST_NAME || ' ' || U1.LAST_NAME || ', Email: ' || U1.EMAIL_ADDRESS`
Column Alias	ASSIGNED_TO_USER_TOOLTIPS
Column Type	Text
Add as Display Column	Unchecked

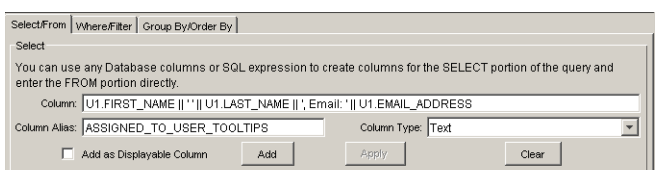


Table B-7. Created By User Tooltips

Field	Information
Select/From Tab	
Column	`U2.FIRST_NAME || ' ' || U2.LAST_NAME || ', Email: ' || U2.EMAIL_ADDRESS`
Column Alias	CREATED_BY_USER_TOOLTIPS
Column Type	Text
Add as Display Column	Unchecked

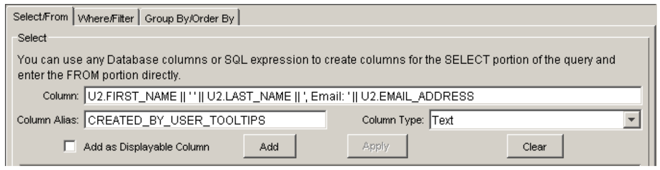


Table B-8. Assigned User (Displayed Column)

Field	Information
Select/From Tab	
Column	R.ASSIGNED_TO_USERNAME
Column Alias	ASSIGNED_TO_USERNAME (this should be filled in automatically once the 'Column' field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Assigned User
Column Title (Max Page)	Assigned User
Max Chars Displayed	13
Column Width	13
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	Yes
Tooltips Column	ASSIGNED_TO_USER_TOOLTIPS
Hyperlink	No

Table B-9. Created By (Displayed Column)

Field	Information
Select/From Tab	
Column	R.CREATED_BY_USERNAME
Column Alias	CREATED_BY_USERNAME (this should be filled in automatically once the 'Column' field is filled and exited)
Column Type	Text

Table B-9. Created By (Displayed Column) [continued]

Field	Information
Add as Display Column	Checked
Column Definition Window	
Column Title	Created By
Column Title (Max Page)	Created By
Max Chars Displayed	10
Column Width	10
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	Yes
Tooltips Column	CREATED_BY_USER_TOOLTIPS
Hyperlink	No

Table B-10. Priority (Displayed Column)

Field	Information
Select/From Tab	
Column	R.PRIORITY_MEANING
Column Alias	PRIORITY (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Priority
Column Title (Max Page)	Priority
Max Chars Displayed	8
Column Width	8
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

Table B-11. Progress (Displayed Column)

Field	Information
Select/From Tab	
Column	RD.VISIBLE_PARAMETER1
Column Alias	PROGRESS (this should be filled in automatically once the 'Column' field is filled and exited)
Column Type	Percentage Bar
Add as Display Column	Checked
Column Definition Window	
Column Title	Progress
Column Title (Max Page)	Progress
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

Table B-12. Current Condition (Displayed Column)

Field	Information
Select/From Tab	
Column	R.USER_DATA5
Column Alias	CURRENT_CONDITION
Column Type	Summary Condition/Exception
Add as Display Column	Checked
Column Definition Window	
Column Title	Summary Condition/Exception
Column Title (Max Page)	Summary Condition/Exception
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

a. Complete the SQL query:

i. In the From Clause field, enter the FROM clause:

```
FROM KCRT_REQUEST_DETAILS RD,
KNTA_USERS U1,
KNTA_USERS U2,
KCRT_REQUESTS_V R
```

ii. Click **Apply** to save the data entered in the **Select/From** tab.

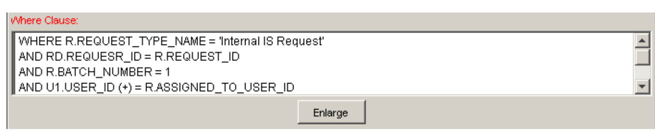
iii. In the Query Definition window, click the **Where/Filter** tab.

iv. In the Where Clause field, enter the WHERE clause:

```
WHERE R.REQUEST_TYPE_NAME = 'Internal IS Request'
AND RD.REQUEST_ID = R.REQUEST_ID
AND R.BATCH_NUMBER = 1
AND U1.USER_ID (+) = R.ASSIGNED_TO_USER_ID
AND U2.USER_ID = R.CREATED_BY
AND (R.ASSIGNED_TO_USER_ID = [SYS.USER_ID]
OR R.CREATED_BY = [SYS.USER_ID])
```

If needed, click **Enlarge** to open a larger SQL entry area to work in.

v. Click **Apply** when finished to save changes without closing the enlarged window or **OK** to save changes and close the enlarged window.



vi. Click **OK** to save the data entered.

The Portlet window is returned.

vii. Click **Save** to save the Portlet.

3. Define the filter fields for the Portlet's edit page.

a. From the Portlet window, click **Edit Query**.

The Query Definition window is returned.

b. Click the **Where/Filter** tab.

The **Where/Filter** tab opens.

c. Click **New**.

The Filter Field Definition window opens.

d. Create the filter fields.

See *Table B-13* for a list of the filter fields and their associated input tables.

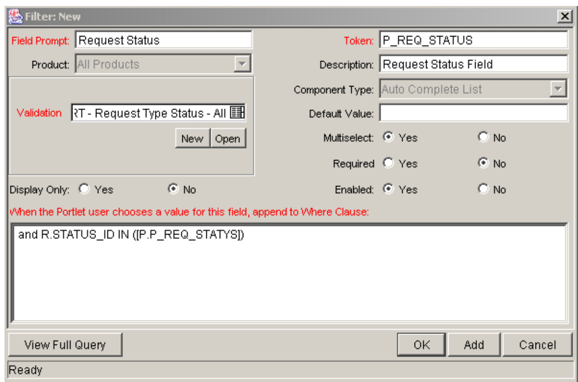


Table B-13. Filter fields

Filter Field	Table
Request Status Filter fields	*Table B-14 on page 117*
'Created From' Date Filter fields	*Table B-15 on page 117*
'Created To' Date Filter fields	*Table B-16 on page 118*
Current Condition Filter fields	*Table B-17 on page 118*
Priority Filter fields	*Table B-18 on page 118*

- To create a filter field:

i. Fill in the appropriate fields using the data in the following tables and click **Add**.

The filter field is saved and all fields in the Filter Field Definition window are cleared.

ii. Repeat until the last filter field.

When the information for the last filter field has been entered, click **OK**. The filter field is saved and the Filter Field Definition window closes, returning to the **Where/Filter** tab of the Query Definition window.

Table B-14. Request Status Filter fields

Field	Information
Field Prompt	Request Status
Token	P_REQ_STATUS
Description	(any useful description)
Validation	CRT - Request Type Status - All
Multi-Select Enabled	Yes
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND R.STATUS_ID IN([P.P_REQ_STATUS])`

Table B-15. 'Created From' Date Filter fields

Field	Information
Field Prompt	Created From
Token	P_CREATED_FROM
Description	(any useful description)
Validation	Date
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND R.CREATION_DATE >= TO_DATE('[P.P_CREATED_FROM]', 'YYYY-MM-DDHH24:MI:SS')`

Table B-16. 'Created To' Date Filter fields

Field	Information
Field Prompt	To
Token	P_CREATED_TO
Description	(any useful description)
Validation	Date
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND TO_DATE(R.CREATION_DATE || '00:00:00', 'YYYY-MM-DD HH24:MI:SS') <= TO_DATE([P.P_CREATED_TO], 'YYYY-MM-DDHH24:MI:SS')`

Table B-17. Current Condition Filter fields

Field	Information
Field Prompt	Current Condition
Token	P_CONDITION
Description	(any useful description)
Validation	DRV - Summary Condition
Multi-Select Enabled	Yes
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND R.USER_DATA5 IN ([P.P_CONDITION.TO_STRING])`

Table B-18. Priority Filter fields

Field	Information
Field Prompt	Priority

Table B-18. Priority Filter fields [continued]

Field	Information
Token	P_PRIORITY
Description	(any useful description)
Validation	CRT - Priority - Enabled
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND R.PRIORITY_CODE = '[P.P_PRIORITY]'`

e. Click **Apply** to save the data entered.

f. Click **OK** to save the Portlet.

The Portlet window returns.

4. Configure the filter field layout.

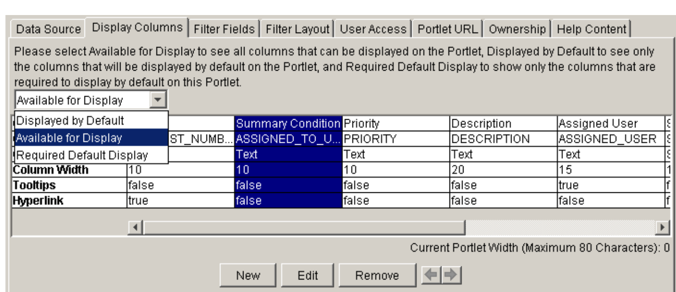
a. In the Portlet window, click the **Displayed Columns** tab.

b. From the drop-down list, select **Available for Display**.

All available columns are displayed. The default setting for the drop-down list is **Displayed by Default**.

c. Using the arrow buttons (and), arrange the columns to appear in the following order, left to right:

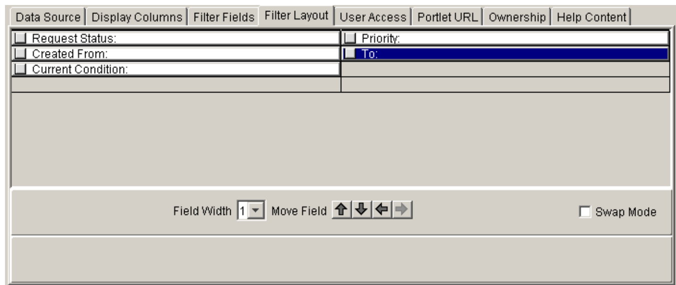
Req # - Summary Condition - Priority - Description - Assigned User - Progress - Created By



d. Click **Save** to save the data entered.

e. In the Portlet window, click the **Filter Layout** tab.

f. Arrange the layout according to the following illustration:



g. Click **Save** to save the Portlet.

5. Specify the Security Groups and users who can use the Portlet.

   In this example, all users and Security Groups will be able to use this custom Portlet.

   a. Click the **User Access** tab.

   b. Verify the field, Allow all users to add this Portlet to their dashboard, is selected.

   c. Click **Save** to save the Portlet.

6. Define the location of the Portlet's JSP pages.

   Defining the location of the Portlet's JSP pages is not included in this example. For information on how to configure a Portlet's JSP page, see *"Portlet URL"* on page 31.

7. Specify the Ownership Groups and users who can copy, edit, or delete the Portlet.

   Specifying the Ownership Groups and users who can copy, edit, or delete the Portlet is not included in this example. All users will be able to copy, edit or delete this custom Portlet. For information on how to configure the Portlet's Ownership Groups, see *"Setting Ownership for Portlets"* on page 32.

8. Include a help window with the Portlet.

   Including a help window with the Portlet is not included in this example. For information on how to configure the Portlet's help window, see *"Creating a Help Window for the Portlet"* on page 34.

9. Require all users to personalize a Portlet the first time they see it on their Dashboard.

   Requiring all users to personalize a Portlet the first time they see it on their Dashboard is not included in this example. Users will not be required to personalize this custom Portlet the first time they see it on their Dashboard. For information on how to require users to personalize a Portlet the first time they see it, see *"Requiring First-Time Personalization"* on page 36.

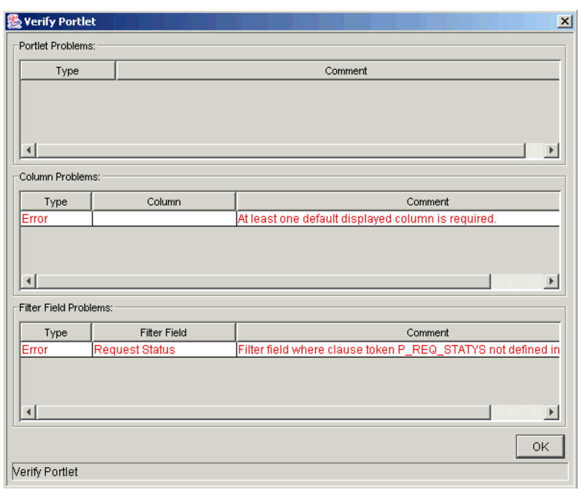
10. Verify the Portlet.

    a. Click the **Data Source** tab.

    b. Click **Verify** to verify the query's Tokens and column interaction.

       A question dialog box should appear, verifying the has no problems. Click **OK** to close the question dialog box.

       If the following Verify Portlet window appears, fix the problems indicated and click **Verify** again until the Portlet is without problems.



    c. Click **Save** to save the Portlet or click **OK** to save changes and close the Portlet window.

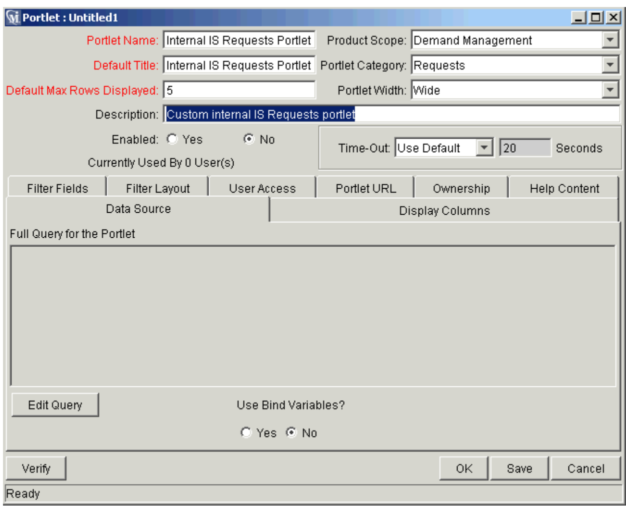
The Portlet is complete.

Once the custom Portlet is complete, the Portlet can be enabled and used on the Dashboard. To enable the Portlet, see *"Enabling the Portlet"* on page 122. To access the Portlet from the Dashboard, see *"Accessing the Portlet from the Dashboard"* on page 122.

Enabling the Portlet

To enable the Portlet:

1. Open the Internal IS Requests Portlet in the Portlet window.



2. In **Enabled,** select **Yes**.

3. Click **Save** to save the changes or click **OK** to save the changes and close the Portlet window.

Accessing the Portlet from the Dashboard

To access the Portlet from the Dashboard:

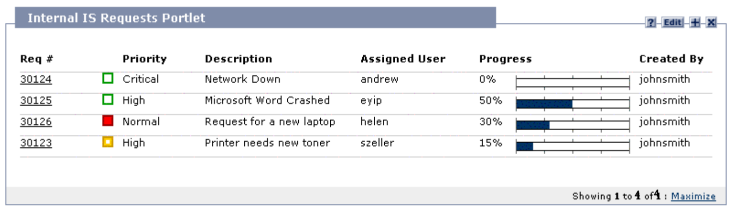
1. Open the Dashboard.

2. Click **Personalize This Page**.

3. Add the **Internal IS Requests** Portlet to the Dashboard.

4. Click **Done**.

   The Portlet should appear where it was placed. The following represents what the Portlet should look like:



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