

Mercury™ IT Governance Center

Using the Workbench

Version 5.5.0

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Chapter 1 Introduction

Mercury IT Governance Center provides two areas where the user can interact with the product: the standard interface and the Mercury IT Governance Workbench. The standard interface uses HTML and Javascript to provide users with access to the key areas of functionality. The Workbench is a Java applet designed to help application administrators, product configuration experts, and Power Users perform advanced configuring and processing tasks, such as creating entities (like Request Types, Object Types, and Workflows). The Workbench can also query detailed information on specific entities, such as a particular Package.

Use the Workbench to:

- Create and configure entities, such as Request Types, Object Types, and Workflows.
- Define Environments for distribution and deployment processes.
- Configure field validations and logic.
- Create Project plans in Mercury Project Management.
- Set user access and security through licensing and entity configuration.
- Create custom Reports and synchronize them with the Reporting Meta Layer.
- Manage instances using the Migrator Object Types.

About This Document

This guide describes how to navigate and use the Mercury IT Governance Workbench. Each chapter covers a specific topic on navigation or usage:

<i>Key Concepts</i>	Provides the general concepts of the Workbench. This includes screen groups and screens, workbenches and detail windows.
<i>Using the Workbench</i>	Describes navigating to specific detail windows in the Workbench and explains regional and other settings configured in the Workbench.
<i>Field Formats</i>	Lists the field formats of the Workbench. This includes information on all of the fields, lists, and buttons found in the Workbench.

Intended Audience

The intended audience for this document includes:

- Users of the Workbench
- Managers who create and manage Requests, Projects, Packages and Tasks
- Managers who create and manage Calendars
- Business configuration experts who model their processes
- System and application administrators responsible for Environments configuration




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

Table 1-1. Document conventions [continued]

Convention	Description	Example
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
<i>Link</i>	Linked URLs, filenames, and cross references are shown as blue italicized text.	www.mercury.com
<i>Variable</i>	Variables are shown as italicized text.	<i>ITG_Home/bin</i> directory
Note	Used to identify note boxes that contain additional information.	
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.	
Example	Used to identify example boxes that contain examples of related procedure.	

Additional Resources

Mercury Interactive provides the following additional resources to successfully use 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 provides details for defining and configuring the Mercury IT Governance Dashboard and custom Portlets.

Security Model Guide and Reference

This document presents an overview of the data security model and provides instructions for controlling access to different entities.

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 defines common concepts and terms used in the Mercury IT Governance Workbench. Understanding these concepts and terms is necessary when using the Workbench.

This chapter covers the following topics:

- *Screen Groups and Screens*
- *Entity Workbench*
- *Detail Windows*
- *Workbench Menu Navigation*

Screen Groups and Screens

Screen groups are the major functional components of the Workbench. A screen group can be product specific or support common functionality. Mercury IT Governance Center administration and configuration functions are performed in the Workbench.

This section covers the following topics:

- *Screen Group Overview*
- *Demand Management Screen Group*
- *Project Management Screen Group*
- *Change Management Screen Group*
- *Time Management Screen Group*
- *Dashboard Screen Group*

- *Environments Screen Group*
- *Configuration Screen Group*
- *System Administration Screen Group*

Screen Group Overview

Screen groups are a collection of functional windows grouped together under a common product or functional area. Screen groups are listed as tabs at the top of the Shortcut bar. Each screen group contains a sets of screens. Each screen contains an entity Workbench and detail windows to perform end-user and configuration functions. Screens are represented as icons below the screen group tabs. Clicking on a screen group tab opens a different set of screens. *Figure 2-1* illustrates the Reports screen, in the Change Management screen group.



Note

Screen group access depends on:

- The appropriate licenses.
- The appropriate Security Group setting.

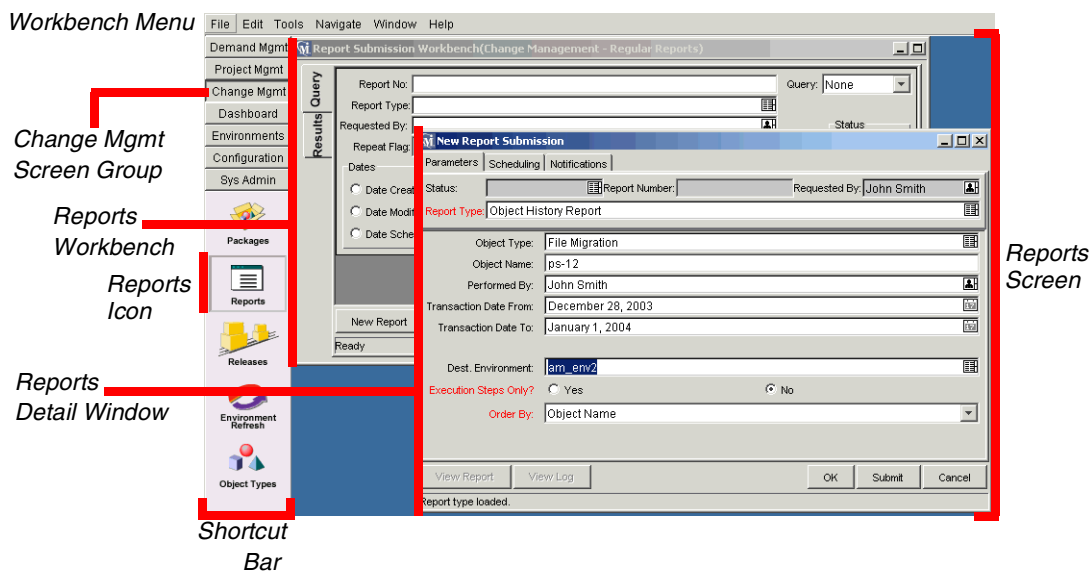


Figure 2-1 Change Management - Reports Workbench and window

Demand Management Screen Group

The **Demand Management** screen group contains screens related to configuring your Mercury Demand Management system. [Table 2-1](#) lists the screens in the **Demand Management** screen group.

Table 2-1. Demand Management Screens

Screens	Definition
Reports	The Reports Workbench runs standard and custom Mercury Demand Management reports. These include reports regarding system set-up, specific configurations, Request Details and Contact Details.
Contacts	The Contacts Workbench is used to quickly generate new Contacts as well as edit existing contact information. Standard information is collected in the Contact window, such as Last Name and Phone Number.
Request Types	The Request Types Workbench is used to define Request Types. A Request Type is a type of template defining the nature of a Request in Demand Management. A few of the available system Request Types are Bug, Enhancement Request, and Patch Request. When a Request is generated, the fields appearing are based on the Request Type. The base install of Demand Management includes the default Request Types, which can be customized. Custom Request Types can also be created.
Request Header Types	Similar to the Request Types Workbench, the Request Header Types Workbench enables Request Types to be changed by changing the Request Header. Request Header Types are used to customize which header fields appear, as well as the layout of these fields.

Project Management Screen Group

The **Project Management** screen group contains screens related to configuring your Mercury Project Management system. [Table 2-2](#) lists the screens in the **Project Management** screen group.

Table 2-2. Project Management Screens

Screens	Definition
Projects	A Project is the fundamental entity of Project Management. The Project Workbench contains all of the information normally required to create and manage a Project.
Reports	The Reports Workbench runs standard and custom Project Management reports. These reports include system set-up, specific configurations and end user reports, such as Project Details.
Project Templates	Project Templates are a reusable collections of Project parameters and processes which can be applied to any Project. Project Templates allow Project Managers to rapidly create customized project plans.
Calendars	The Calendar Workbench is where Project Managers record company and individual working and non-working days. This information is used by the scheduling engine to aid in determining project start and finish dates.

Change Management Screen Group

The **Change Management** screen group contains screens related to configuring your Mercury Change Management system. [Table 2-3](#) lists the screens in the **Change Management** screen group.

Table 2-3. Change Management Screens

Screens	Definition
Packages	The Packages Workbench is used to create Packages. A Package is the fundamental entity of Change Management. Packages contain all of the information needed to be processed including the Package Type, priority and status. A Package also contains a list of all objects to be tracked and migrated as the Package moves through the Workflow. Processing Packages and Package Lines vary greatly depending upon the Workflow specified for the Package.
Reports	The Reports Workbench runs standard and custom Change Management reports. These include reports regarding system set-up, specific configurations and end user reports.

Table 2-3. Change Management Screens [continued]

Screens	Definition
Releases	Using the Release Workbench, Change Management users can manage and control software changes by grouping them in scheduled releases. Releases codify best practices and easily manage complex Package dependencies.
Environment Refresh	The Environment Refresh Workbench is used to update the audit history and in-process Packages. During the course of day-to-day application management activity, specific software changes are migrated to various instances using Change Management. Change Management maintains an audit trail of all this activity, providing clear visibility to all the changes for each environment.
Object Types	The Object Types Workbench is used to define the different types of entities to be controlled and migrated. Object Types are user-configurable. Every Object Type has a unique set of fields determining the information it requires, as well as any additional information it might accept. Each Object Type can also have associated Commands which determine its behavior as it moves between Environments or Environment Groups.

Time Management Screen Group

The **Time Management** screen group contains screens related to configuring your Mercury Time Management system. [Table 2-4](#) lists the screens in the **Time Management** screen group.

Table 2-4. Time Management Screens

Screens	Definition
Reports	The Reports Workbench runs standard and custom Change Management reports. These include reports regarding system set-up, specific configurations and end user reports.
Time Management Settings	The Time Management Settings Workbench views or updates Time Management settings for a specific Resource.

Table 2-4. Time Management Screens [continued]

Screens	Definition
Override Rules	The Override Rules Workbench is used to supersede default cost rates and instead base the cost rates on specific Time Sheet line information such as Work Item Type and Work item. Override Rules can also be used to override Approver information and Charge Codes.
Activities	The Activity Workbench is used to view, add or update a specific Activity. The Activity window defines basic information for the Activity as well as the areas where the Activity can be used.
Charge Codes	The Charge Codes Workbench is used to add, view, or update a Charge Code. Charge Codes create links between Work Items and charge accounts, allowing time information to be extracted by a billing systems.

Dashboard Screen Group

The **Dashboard** screen group contains all of the functions required for creating custom Portlets. [Table 2-5](#) lists the screen of the **Dashboard** screen group.

Table 2-5. Dashboard Screen

Screen	Definition
Portlet	The Portlet Workbench is used to create new Portlets. Application administrators create custom Portlets by identifying the information to be displayed in the Portlet, designing a database query retrieving the information and creating a Portlet configuration to perform these steps.

Environments Screen Group

The **Environments** screen group contains screens related to configuring your Environment. [Table 2-6](#) lists the screens in the **Environments** screen group.

Table 2-6. Environments Screens

Screens	Definition
Environments	The Environments Workbench is used to create and maintain Environments. An Environment is comprised of a unique combination of server, client, database, and file system information representing one logical group. Environments are typically used in distribution and deployment systems. The Environment server is the main host machine for the Environment. The Environment client is the remote client machine for the specified Environment.
Environment Groups	The Environment Groups Workbench is used to create and maintain Environment Groups. Environment Groups define a set of Environments which can be referenced as the Sources or Destinations for object migrations. Environment Groups are designed to facilitate the migration of objects to multiple Environments. A Source Environment Group and Destination Environment Group can be specified when configuring a Workflow Execution step.

Configuration Screen Group

The **Configuration** screen group contains screens related to configuring Mercury IT Governance Center. [Table 2-7](#) lists the screens in the **Configuration** screen group.

Table 2-7. Configuration Screens

Screens	Definition
Workflows	The Workflow Workbench is used to create and maintain Workflows potentially used by all products. A Workflow consists of a logical series of steps defining a business process. Business process routing is configurable with Mercury IT Governance Center, handling virtually any situation. This allows an organization to generate Workflows to automate existing processes, rather than forcing users to adopt a new set of processes to perform their work.

Table 2-7. Configuration Screens [continued]

Screens	Definition
Validations	The Validations Workbench is used to create and maintain Validations in the system. Validations determine the acceptable values available in user-defined custom fields, such as those found in Request Types, Workflow Steps and Object Types. Validations enforce data integrity by ensuring the proper information is entered in a field before it is saved to a database. More complex Validations can be used to verify such information as whether or not a user assigned to a Task is a valid user. These Validations can be based on values returned from a database query or the execution of a system command.
User Data	The User Data Workbench creates fields used to capture specific business processes. Every entity, such as Workflows, Packages and Environments, comes with a set of standard fields. Every entity also has the flexibility to hold additional information specific to business processes.
Special Commands	The Special Commands Workbench is used to create and maintain Special Commands. Special Commands are commands with variable parameters used in the command steps of Object Types, Report Types, and Request Types. Special Commands perform a variety of functions, such as copying files between Environments and establishing connections to Environments for remote command execution. There are two types of Special Commands: predefined Special Commands and user defined Special Commands.
Notification Templates	The Notification Templates Workbench is used to create and maintain Notification Templates. Notifications are sent out by products to let users know the status of an entity, such as a Package, Request, or Project. Notification Templates can be defined for standard messages which might be required on multiple Workflow steps.
Report Types	The Report Types Workbench is used to create and maintain Report Types. Report Types define the standard or custom reports defined within Mercury IT Governance Center. These reports are configurable and can be run by both administrators and end users. Reports are run from the Reports window and produce textual reports viewable through a Web browser.

System Administration Screen Group

The **System Administration** screen group contains screens related to administering your system. [Table 2-8](#) lists the screens in the **System Administration** screen group.

Table 2-8. System Administration Screens

Screens	Definition
Users	The Users Workbench is used to create and maintain all users in the system. Mercury IT Governance Center provides a secure access mechanism and a complete audit trail of activity. Each user definition contains essential information about the user, including the user's email address, start and end dates, the user's authorized applications, and the user's Security Group.
License	The License Workbench is used to assign licenses to multiple users or modify the license assignments to already-licensed users.
Security Groups	The Security Groups Workbench is used to create and maintain Security Groups. Security Groups provide a means of grouping users together into screens and functional access levels.
Server Tools	The Server Tools Workbench views the technical status of the application server. This workbench offers a series of queries against the server to give information such as connected users and number of database sessions. This Workbench is primarily used by the application administrator to view application activity or trouble-shoot connection problems.

Entity Workbench

Every configuration entity has a Workbench to help query detailed information on a specific entity. These entities are selected by entering search criteria in the **Query** tab of the Workbench, which returns the matching entities in the **Results** tab. [Figure 2-2](#) shows a sample Workbench.

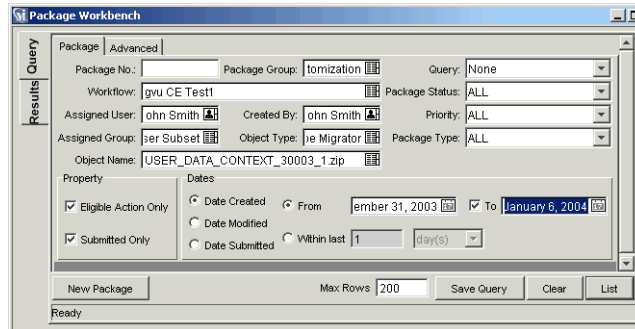


Figure 2-2 Package Workbench

Detail Windows

Every configuration entity has detail windows to view, define, create, edit or delete the entity. Detail windows are reached through an entity's Workbench. [Figure 2-3](#) illustrates the Request Type detail window.

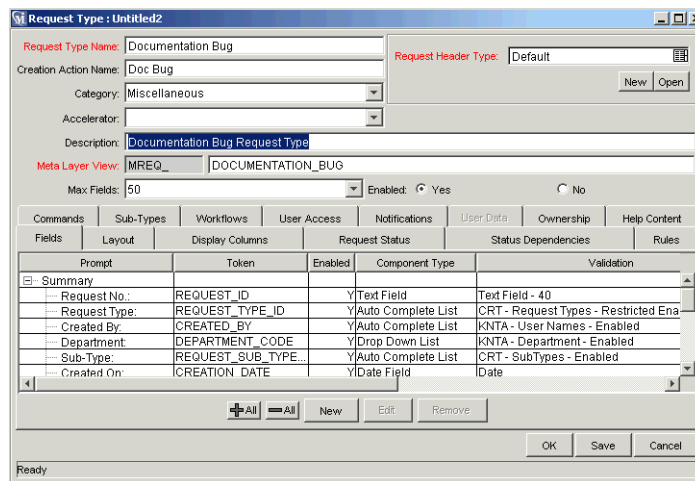


Figure 2-3 Request Type window

Workbench Menu Navigation

The **Navigate** menu can be used instead of the Shortcut bar to access entity Workbenches. All available screen groups and Workbenches are accessible

through the **Navigate** menu. The **Navigate** menu's structure mimics the Shortcut bar and is accessible at all times.

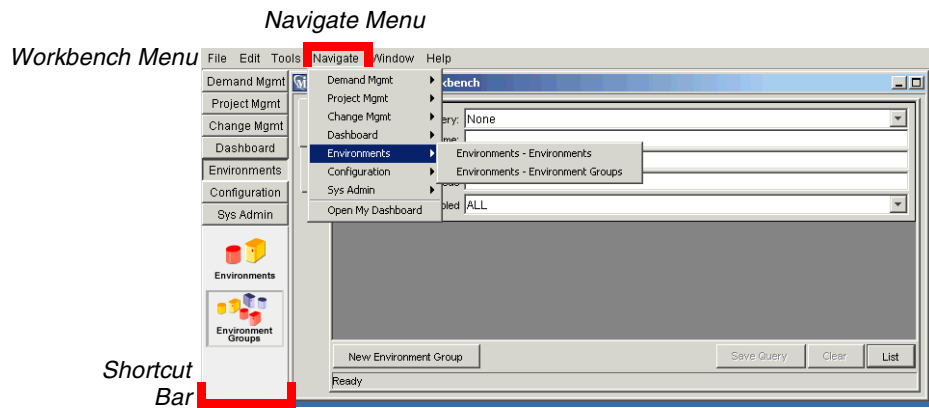


Figure 2-4 Navigate Menu

Chapter 3

Using the Workbench

This chapter details information and procedures for using the Mercury IT Governance Workbench including the different ways of navigating between detail windows in the Workbench. Additionally, this chapter details how to search for entities, using the advanced search features, and how to change the way the Workbench looks and operates.

This chapter covers the following topics:

- *Logging On and Off the Workbench*
- *Navigating Between Detail Windows*
- *Searching for Entities*
- *Using Advanced Query Searches*
- *Using Saved Queries*
- *Configuring User Profiles*
- *Configuring Regional Settings*
- *Configuring Server Settings*
- *Using the Navigation Menu*
- *Changing Your Password*
- *Accessing Entity-Dependent Menus*

Logging On and Off the Workbench

The Workbench is accessed through the standard Mercury IT Governance interface. This section details the steps required to logon to the Workbench and to log off the Workbench.

To Logon to the Workbench:

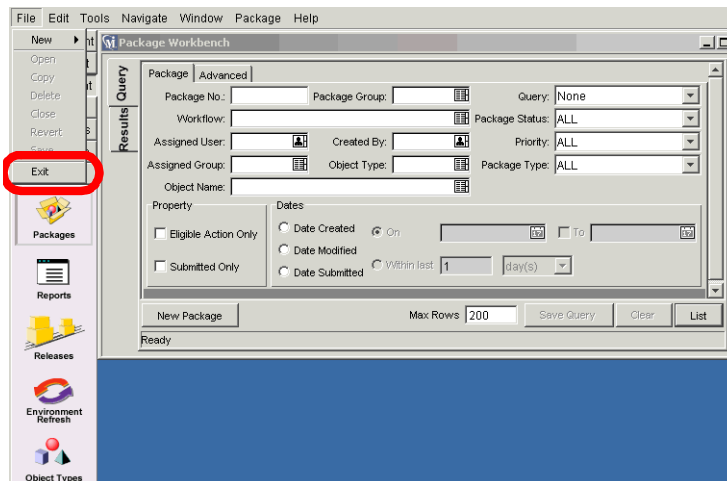
1. Logon to the Dashboard.
2. From the Menu bar, select **Administration > Open Workbench**.

The Workbench opens.

To Log off the Workbench:

1. On the Workbench menu, select **File > Exit**.

The Workbench closes.



Navigating Between Detail Windows

Workbenches and detail windows are accessed by selecting a screen group and screen, as displayed in [Figure 3-1](#). Examples of entities with Workbenches include:

- Request Types
- Request Header Types
- Projects
- Portlets
- Object Types
- Environments
- User Data
- Validations

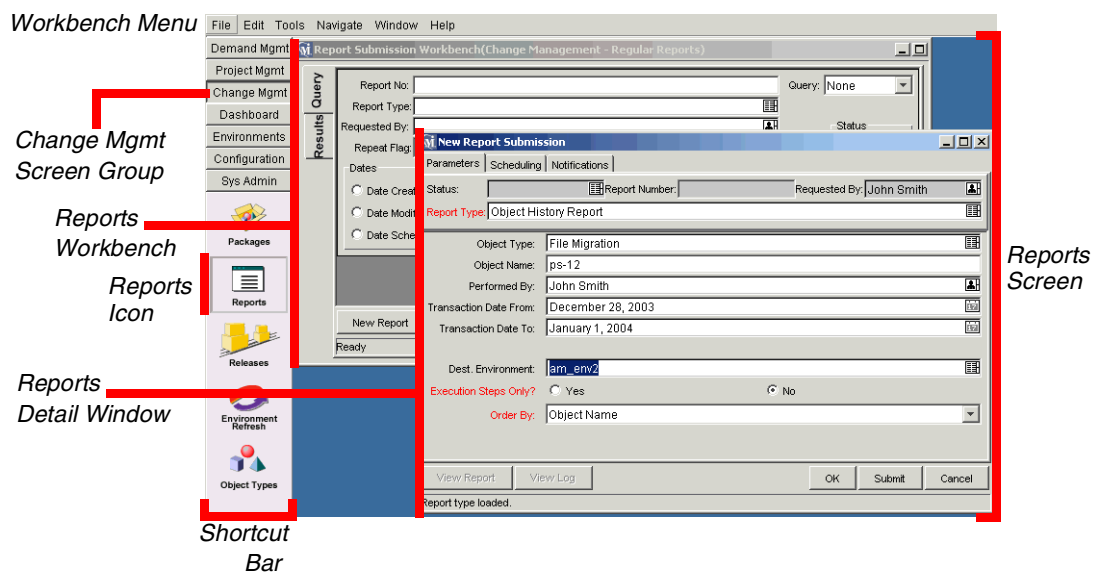
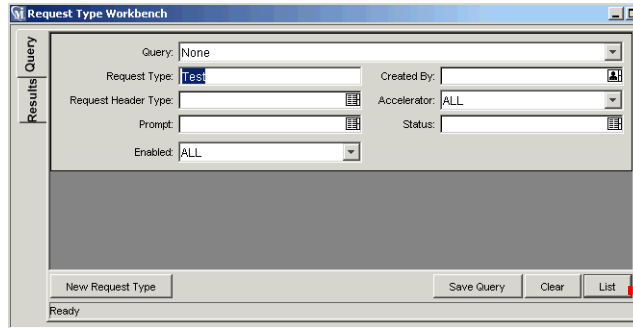


Figure 3-1 Screen Group, Screen, Workbench, and Detail Window

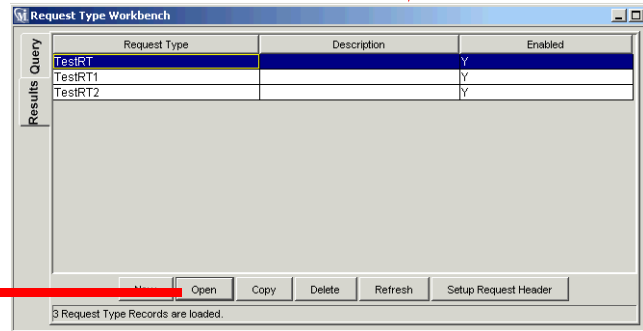
Detail windows are accessed through the entity workbench, which consists of a **Query** tab and a **Results** tab. [Figure 3-2](#) illustrates how to navigate to a detail window.

1. Enter search criteria and click List to see matching results.



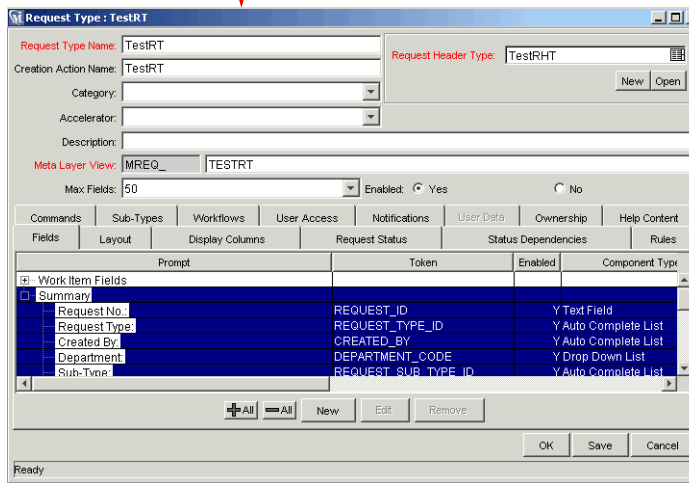
Request Type Workbench Query Tab

2. Select the desired entity and click Open to view details.



Request Type Workbench Results Tab

3. Detail window opens.



Request Type Detail Window (Bug)

Figure 3-2 Navigating to a detail window

If multiple detail windows have been opened, they can be accessed using the buttons at the bottom of the Workbench, as shown in [Figure 3-3](#).

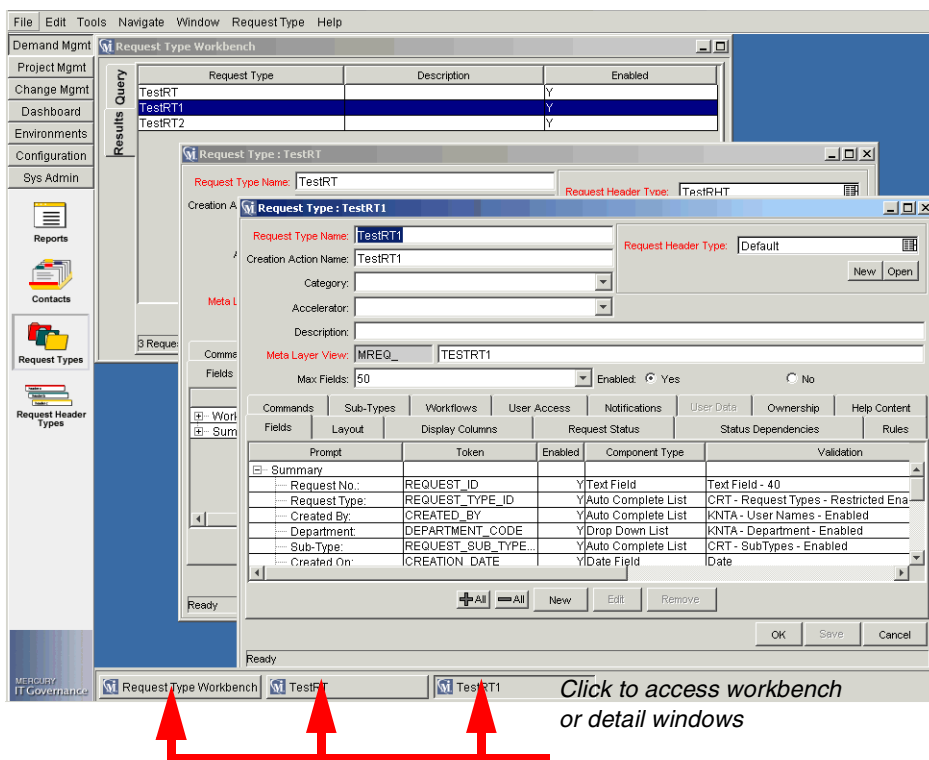


Figure 3-3 Navigating between multiple open detail windows

Searching for Entities

An entity's Workbench provides an interface for users to search for a specific entity, such as a Package or Request Type. These entities are selected by entering search criteria in the **Query** tab of the workbench, which returns the matching records in the **Results** tab.

To search for an entity, enter criteria in any combination of the fields in the **Query** tab. Clicking **List** searches for all records matching the criteria and reports the results in the **Results** tab. See the following topics for more detailed information:

- “*Query Tab*” on page 22
- “*Results Tab*” on page 22

Query Tab

The **Query** tab of a given Workbench includes all of the fields used to search for an entity. For example, the Request Type Workbench **Query** tab includes fields included in a Request Type.

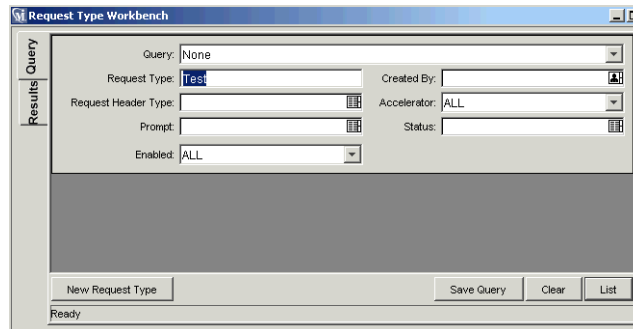


Figure 3-4 Request Query Tab

Each Workbench has one field used to query the primary name for the entity. When searching for the name of an entity, the value entered in the field is case insensitive and can be a partial value. For example, entering “test” in the Request Type Name field returns Request Types with names like ‘TEST Project’ and ‘Testing Case Project.’

The **Query** tab also accepts a wildcard character (“%”) when searching on the entity’s name. This matches against any characters. For example, to query all Request Types with “ample” in their name, search by “%ample”. This query returns Request Types with names like ‘Request Type Example’ and ‘Sample Request Type’.

Some Workbenches also have a Max Rows field. This field limits the number of rows returned by a query. Regardless of the total results in the system matching the query parameters, no more than 200 rows will be returned. Decrease the number of maximum rows to yield faster queries.

Results Tab

The **Results** tab is automatically displayed when a query is submitted. The **Results** tab displays all of the entities matching the query criteria, along with key data fields for each entity. The results can be sorted on any of the fields by clicking the column header. In the **Results** tab, select any of the returned entities (or a range of entities) for viewing, copying or modifying.

From the **Results** tab, you can access the detailed information on the desired entity (for example, Request Header Type). Select the result and click **Open** to

proceed to that entity's detail window. Click on a record to select it, or use Ctrl-click (press Ctrl while clicking the mouse) to select multiple distinct records. Use Shift-click (press Shift key while clicking the mouse) to select a range of records.

The **Results** tab also provides buttons for executing other common tasks. From the **Results** tab, users can also create **New** records, **Copy** or **Delete** existing items, or re-run the query by clicking **Refresh**. A sample **Results** tab is shown in *Figure 3-5*.

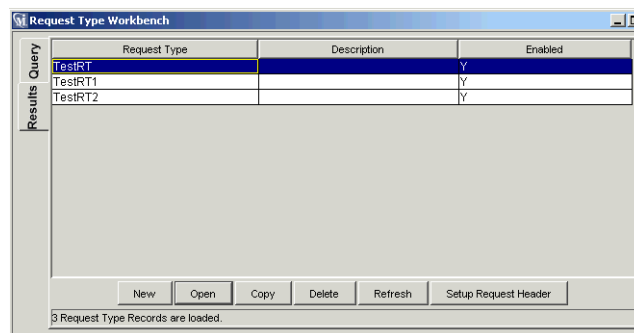


Figure 3-5 Results Tab

Using Advanced Query Searches

The entity Workbench provides an interface for users to search for a specific entity, such as a Package or Request Header Type. These entities are selected by entering search criteria in the **Query** tab of the workbench, which returns the matching records in the **Results** tab of the Workbench.

To perform an advanced query, click the **Advanced** tab on the Workbench's **Query** tab. Here you can set up custom lists of inclusions and exclusions in the database search. New conditions can be set up and conditions of an existing advanced query can be edited, enabled, disabled, and deleted. A search is first performed on the information in the Query. Whatever results are processed from the simple query are passed through the advanced query.

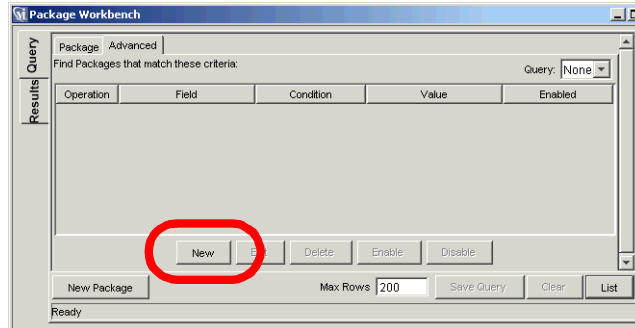


To use only the advanced query, make sure to leave the simple query tab blank.

To create new criteria for an advanced query:

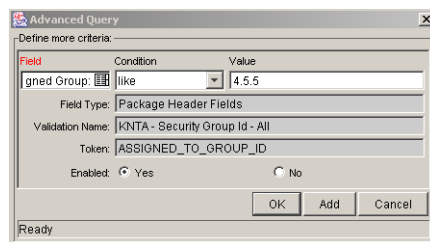
1. On the **Query** tab of a Workbench, click the **Advanced** tab.

The **Advanced** tab opens.



2. Click **New**.

The **Advanced Query** window opens.

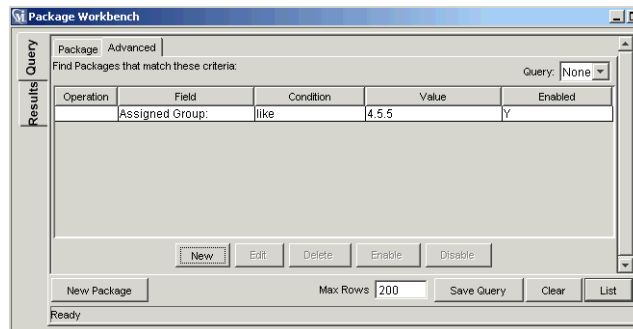


3. In the Field field, choose a field from the auto-complete field.
4. In the Condition field, select the condition from the drop down list.

See [Table 3-1](#) for the list of conditions.

5. In the Value field, enter a value for the field.
6. Click **Add**.

The additional logic is added to the list of parameters. The list of results considers each parameter on the list, and only items matching all of the logic are displayed. If zero matches are returned, be less restrictive by disabling or removing some of the criteria.



Descriptions of the Boolean operators available in the Condition drop down list are shown in [Table 3-1](#).

Table 3-1. Boolean Operators

Condition	Description
Like	Like looks for close matches of the value to the contents of the selected field.
Not like	Not like looks for contents in the selected field which are not close matches to the value field.
Like	Like looks for close matches of the value to the contents of the selected field.
Not like	Not like looks for contents in the selected field which are not close matches to the value field.
Equal to	Equal to looks for an exact match of the value to the contents of the selected field.
Not equal to	Not equal to will return all results which are not an exact match of the value to the contents of the selected field.
Is null	Is null will return all instances in which the selected field is blank.
Is not null	Is not null will return all instances in which the selected field is not blank.
Greater than	Greater than looks for a numerical value in excess of the value entered in the Value field.
Less than	Less than looks for a numerical value below the value entered in the Value field.
Greater than equal to	Greater than equal to looks for a numerical value in excess or the same as the value entered in the Value field.

Table 3-1. Boolean Operators [continued]

Condition	Description
Less than equal to	Less than equal to looks for a numerical value below or the same as the value entered in the Value field.

Using Saved Queries

Saved queries provide a quick method for performing standard, reoccurring searches.

This section covers the following topics:

- [“Saving a Query”](#) on page 26
- [“Using a Saved Query”](#) on page 27
- [“Deleting a Saved Query”](#) on page 28



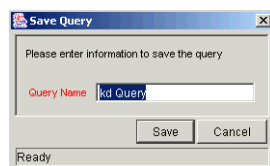
Each day a query is run for all Packages assigned in the last day. These query parameters can be saved to avoid entering the same parameters every day.

Saving a Query

To save a search query:

1. On the **Query** tab of a Workbench, enter the search parameters for a query.
2. Click **Save Query**.

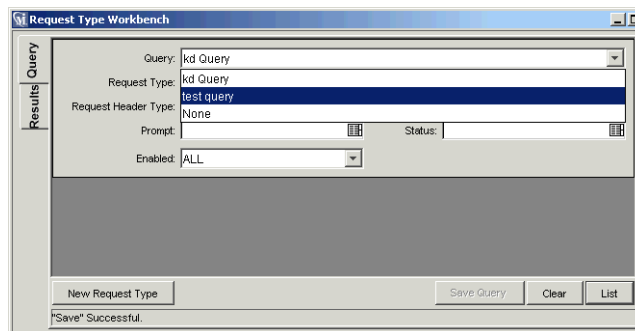
The Save Query window opens.



3. In the Query Name field, enter a unique query name.

4. Click **Save**.

The query is saved. Once the query is saved, the saved query can be selected from the **Query** tab's Query field drop down list.

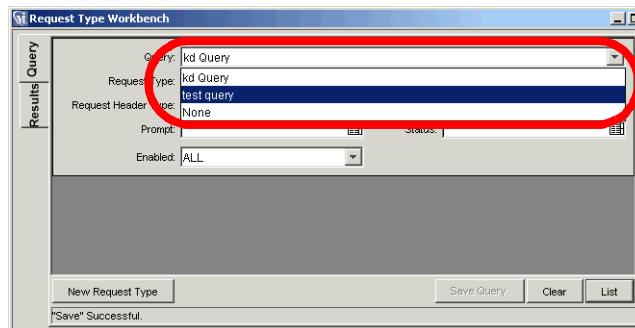


Note

Only the user who saved the query can access and use that saved query.

Using a Saved Query

To use a saved search query:



1. From the Query field list, select a saved query name.

The fields of the **Query** tab are populated.

2. Click **List**.

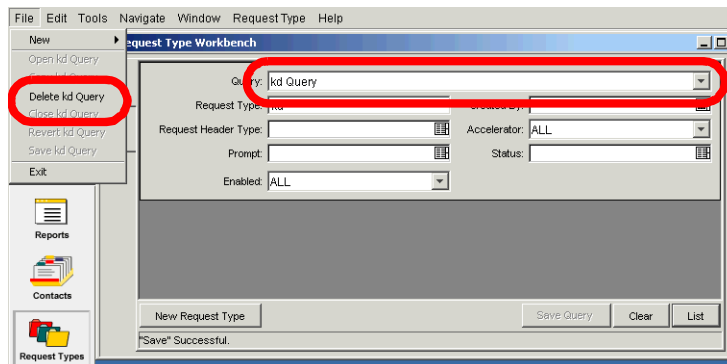
The search is run with the saved parameters of the selected query.

Deleting a Saved Query

To delete a saved search query:

1. From the Query drop down list, select a saved query name.

The fields of the **Query** tab are populated.



2. From the Workbench menu, select **File > Delete <query name>**.

A Question Dialog opens.

3. In the Question Dialog, click **Yes**.

The saved query is deleted.

Configuring User Profiles

The User Profiles window determines the way certain Workbench features function for a particular user. These user profiles are set on a per-user basis. Changes to a user's profile does not affect other user's Workbench settings. Open the User Profiles window by selecting **Edit > User Profiles** from the Workbench menu.

This section covers the following topics:

- *“Setting User Profiles”* on page 29
- *“Setting the Display of Workflows”* on page 30

- “*Setting the Display of Cancelled Package Lines*” on page 32

Setting User Profiles

The **General** tab of the User Profiles window controls common settings for the Workbench. This section lists the fields of the **General** tab and provides an example of configuring a setting on the **General** tab. To access the **General** tab, from the Workbench menu select **Edit > User Profiles**. *Figure 3-6* shows the **General** tab of the User Profiles window. *Table 3-2* defines the fields of the **General** tab of the User Profiles window.

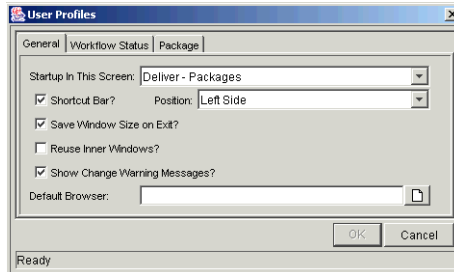


Figure 3-6 User Profiles Window - General Tab

Table 3-2. User Profile Window - General Tab

Fields	Description
Startup in this Screen	Determines which screen group is first seen when logging into the application.
Shortcut Bar?	Determines whether or not the shortcut bar is shown. If the shortcut bar is not shown, navigate between windows using the Navigate menu.
Position	If the shortcut bar is shown, determines which side of the Workbench it appears on.
Save Window Size on Exit?	Saves the size of the entire Workbench when exiting the application. The window retains its size when logging back into the application.
Reuse Inner Windows?	Determines whether or not multiple windows can be open at once. If this field is unchecked, only one detail window for each entity from its workbench can be selected.
Show Change Warning Messages?	Determines whether or not warning messages are sent when attempting to change the entities (such as Project Templates).

Table 3-2. User Profile Window - General Tab [continued]

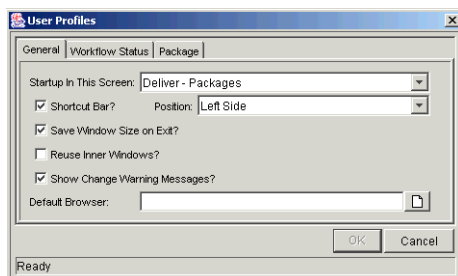
Fields	Description
Default Browser	Determines which browser is used to view attachments and URLs.

The following is an example of setting a field on the **General** tab. The following process details the steps required to hide the Shortcut bar.

To hide the Workbench Shortcut bar:

1. On the Workbench menu, select **Edit > User Profiles**.

The User Profiles window opens.



2. De-select the Shortcut Bar checkbox.
3. Click **OK**.

The change is accepted and the Shortcut bar is no longer visible on the Workbench.

Setting the Display of Workflows

The **Workflow Status** tab of the User Profiles window controls settings for the display of Workflows based on the status of their steps. [Table 3-3](#) lists the fields of the **Workflow Status** tab and details how to show all of a Workflow's steps. To access the **Workflow Status** tab, from the menu select **Edit > User Profiles**.

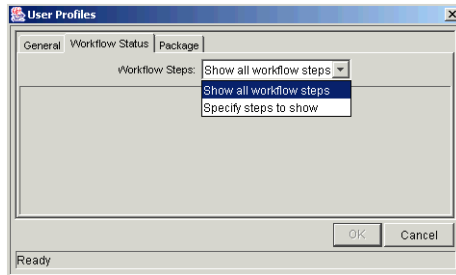


Figure 3-7 User Profiles Window - Workflow Status Tab

Table 3-3. Workflow Status Options

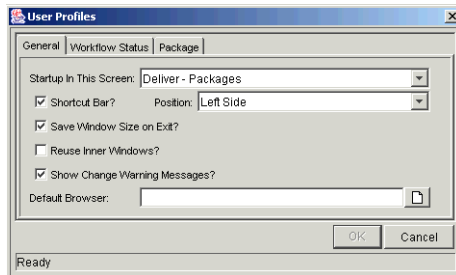
Field	Option
Workflow Steps	<p>Sets the display of Workflow steps. The following lists the options of the Workflow Steps field:</p> <ul style="list-style-type: none"> • Show all Workflow Steps Show all the steps in the Workflow. No options are available. • Specify steps to show Choose whether to show traversed steps, and also whether to hide immediate and condition steps not in progress.

The following process details how to show all of the steps in a Workflow.

To show all of a Workflow's steps:

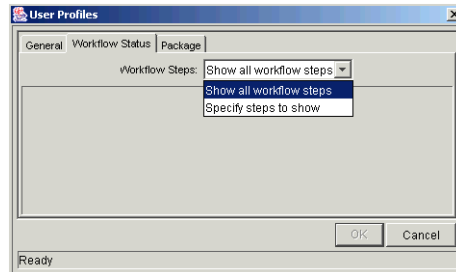
1. On the Workbench menu, select **Edit > User Profiles**.

The User Profiles window opens.



2. Click the **Workflow Status** tab.

The **Workflow Status** tab opens.



3. In the Workflow Steps field, select **Show all workflow steps**.
4. Click **OK**.

The **Show all workflow steps** option is set.

Setting the Display of Cancelled Package Lines

The **Package** tab of the User Profiles window controls settings for the display of cancelled Package Lines. This section details how to hide cancelled Package lines using the **Package** tab. To access the **Package** tab, from the Workbench menu select **Edit > User Profiles**. *Figure 3-8* shows the Users Profile window **Package** tab.

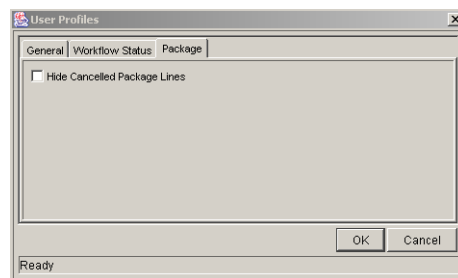
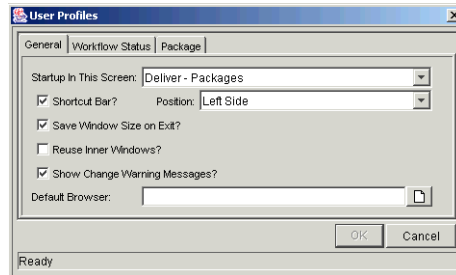


Figure 3-8 User Profiles Window - Package Tab

To hide cancelled Package lines:

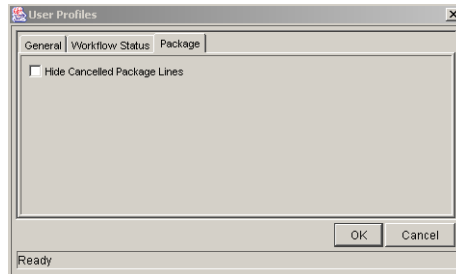
1. On the Workbench menu, select **Edit > User Profiles**.

The User Profiles window opens.



2. Click the **Package** tab.

The **Package** tab opens.



3. Select the **Hide Cancelled Package Lines** checkbox.
4. Click **OK**.

The **Hide Cancelled Package Lines** option is set.

Configuring Regional Settings

Users can modify the display of dates, times, and numbers using the Regional Settings window. Each user's computer operating system has a locale setting specifying the user's language and country. Mercury IT Governance Center reads this setting and displays dates, times, and numbers according to the region's customary format. For example, in Germany dates are displayed in day-month-year format with periods as separators (18.4.2001). In the United States, dates are displayed in month-day-year format with backslashes as separators (4/18/01).

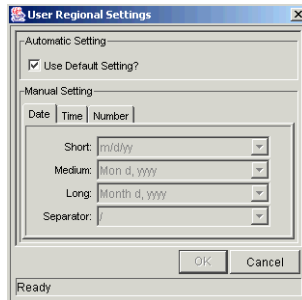


Note

All dates, times, and numbers are set to display using the default settings for the user's locale.

To modify the display of regional settings:

1. On the Workbench menu, select **Edit > Regional Settings**.



2. De-select the Use Default Setting check box.
3. Click the **Date** tab.

The **Date** tab is used to set the display of dates to short, medium and long format. The following lists examples of date formats:

- Short - m/d/yy
- Medium - dd-Mon-yy
- Long - Month d, yyyy

Users can also specify the characters used to separate days, months, and years. Formats and delimiters are updateable through drop down lists.

4. Click the **Time** tab.

The **Time** tab is used to set the display of times in either the 12 or 24-hour format. Users can also specify AM and PM symbols and the character used to separate hours, minutes, and seconds. Format, symbols, and delimiters are updateable through drop down lists.

5. Click the **Number** tab.

The **Number** tab is used to configure which characters are used to denote decimals (either a period or a comma). Users can also define the grouping of digits, the symbol used to group them, and the sign used to mark percentages. Decimal markers, digit groupings and symbols, and percentage signs are updateable through drop down lists.

6. Click **OK**

The new settings for the date, time, and number are saved. These settings are saved in each user's personal profile, and are not editable by any other user.

7. Log off of the Workbench.

Users must log off of the Workbench and then logon again for the new regional settings to take effect.

Configuring Server Settings

The Server Settings window is used to configure how much information is logged by the server while running the application. This log information is used to analyze performance issues and gather information while the application is in use. [Figure 3-9](#) shows the Server Settings window. [Table 3-4](#) shows the fields of the Server Settings window.



Note

Unless specifically told to do so by the application administrator, do not change the Server Settings.

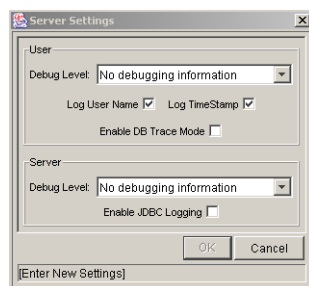


Figure 3-9 Server Settings Window

Table 3-4. Server Settings Field Definitions

Field	Definition
Debug Level (User)	<p>Sets the debug level for the client. The following lists the options of the Debug Level (User) field:</p> <ul style="list-style-type: none"> • No debugging information System debug level is set to NONE. Only critical events are written to the log file. • Normal debugging information System debug level is set to LOW. System performance is degraded. • Maximum debugging information System Debug level is set to HIGH. System performance is degraded.
Log User Name	Sets whether to include the username in the Log file.
Log TimeStamp	Sets whether to enable a timestamp in the Log file.
Enable DB Trace Mode	Sets whether to enable the database trace mode.
Debug Level (Server)	<p>Sets the debug level for the client. The following lists the options of the Debug Level (Server) field:</p> <ul style="list-style-type: none"> • No debugging information Server debug level is set to NONE. Only critical events are written to the log file. • Normal debugging information Server debug level is set to LOW. System performance is degraded. • Maximum debugging information Server Debug level is set to HIGH. System performance is degraded.
Enable JDBC Logging	Sets whether to enable JDBC.

Using the Navigation Menu

The **Navigate** menu on the Workbench menu can be used instead of the Shortcut bar. All available screen groups and the Workbenches are accessible through the **Navigate** menu. The **Navigate** menu's structure mimics the Shortcut bar and is accessible at all times.



To hide the Shortcut bar, use the **General** tab of the User Profiles window. For more detailed information, see [“Setting User Profiles”](#) on page 29.

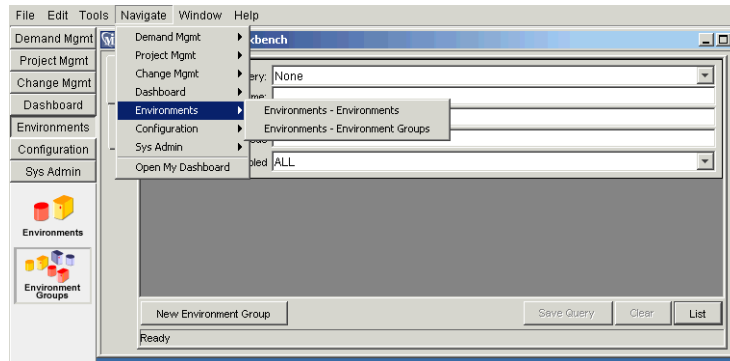


Figure 3-10 Navigate Menu

Changing Your Password

The **Tools** menu on the Workbench menu can be used to set a user's password. This functionality is identical to setting a user's password from the Dashboard's menu bar **Settings > Edit my Profile** page.

To set the standard interface password from the Workbench:

1. On the Workbench menu, select **Tools > Change Password**.

The Change Password window opens.

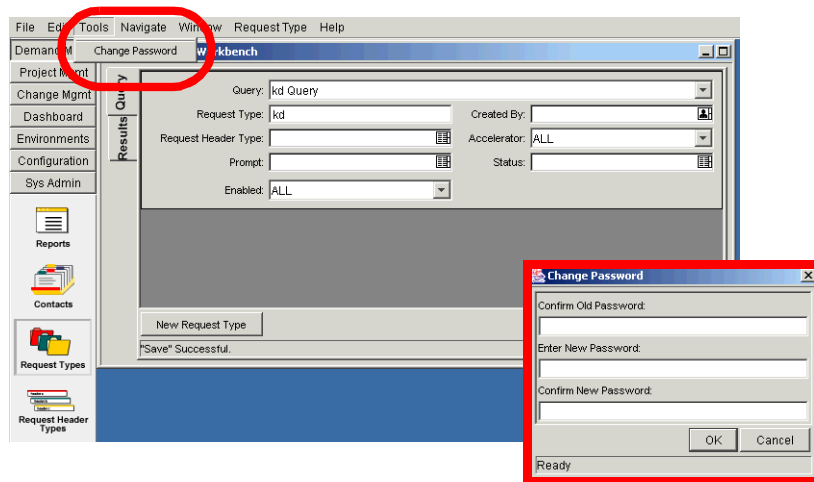


Figure 3-11 Tools Menu

2. In the Confirm Old Password field, enter the old password.
3. In the Enter New Password field, enter the new password.
4. In the Confirm New Password field, re-enter the new password.
5. Click **OK**.

The new user password is accepted.

Accessing Entity-Dependent Menus

Certain entities have extra configuration or processing options which are accessed through their own menus. These extra menus appear on the Workbench menu when the entity is selected. For example, when selecting a Request Type, the Request Type menu is added to the Workbench menu (see [Figure 3-12 on page 39](#)).

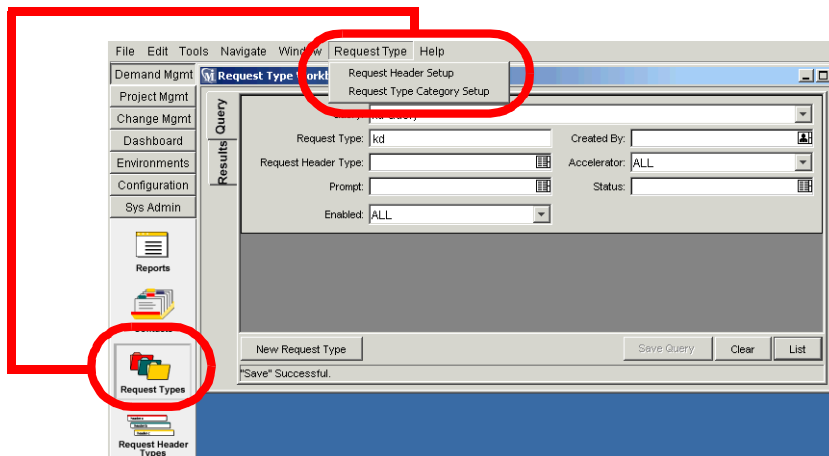


Figure 3-12 Entity-Dependent Menu - Request Type

Appendix

A

Field Formats

The Mercury IT Governance Workbench features a number of standard interface components. This appendix summarizes these components.

This appendix covers the following topics:

- *Attachment Field*
- *Auto-Complete Lists*
- *Arrows*
- *Check Boxes*
- *Dates*
- *Drop Down List*
- *Lists*
- *Radio Buttons*
- *Text Areas*



Note

The field labels for required fields are always marked with red text.

For detailed information on altering the look and feel of these fields, consult the Validations appendix in *Configuring a Request Resolution System* or *Configuring a Deployment System (Change Management)*.

Attachment Field

Attachment fields occur as part of Request details or header fields. Attachment fields also occur as User Data fields. Attached documents are viewable by clicking on the hyper-linked name. When no file is attached, the Attachment field consists of the text field and a Browse button.

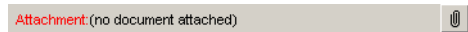


Figure A-1 Attachments field without attachment

Once an attachment is added and saved, such as by saving a Request, the name of the attachment and a Remove button are added to the Attachment field. Clicking the Remove button removes the attachment.

Clicking the Browse button allows a different file to be selected, which replaces the currently attached file.

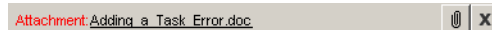


Figure A-2 Attachment field with attachment

Auto-Complete Lists

Auto-complete lists are used for fields validated against a list of pre-defined values. When entering a partial value into an auto-complete field, press the tab key and an auto-complete list opens. The auto-complete list shows all of the pre-defined values matching the partial value. Clicking on the icon located in the field also opens the auto-complete list.

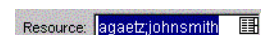
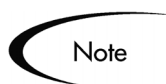


Figure A-3 Auto-Complete List field



Note

If no value is typed into the auto-complete field and you tab out of the field, the auto-complete dialog will not open, even if the field is required. If a mouse is used to navigate out of the field, the field will not be validated. If the field is left without using the tab key, the field will be validated at the next save.

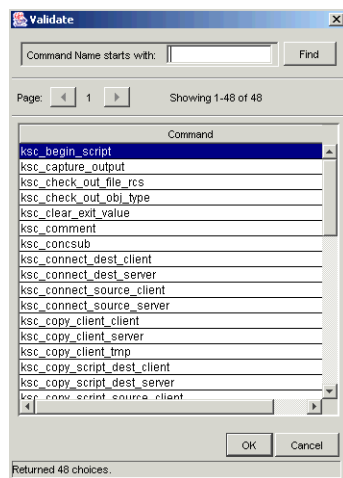


Figure A-4 Auto-Complete Single Selection window

Long auto-complete lists return all matching entities in a paging mode. Users navigate through multiple pages of entities using page numbers or arrow buttons. The number of returned pages and the current position in the list is displayed.

Filter fields at the top of a Validation window can be used to shorten the list. Enter some or all of an entity's name and click **Filter**. To clear the filter fields, click **Clear**.

Some auto-complete lists can be configured to hold multiple values. When the auto-complete's Validate page opens, an available page listing all available entries is opened and an adjacent selected page is also opened.

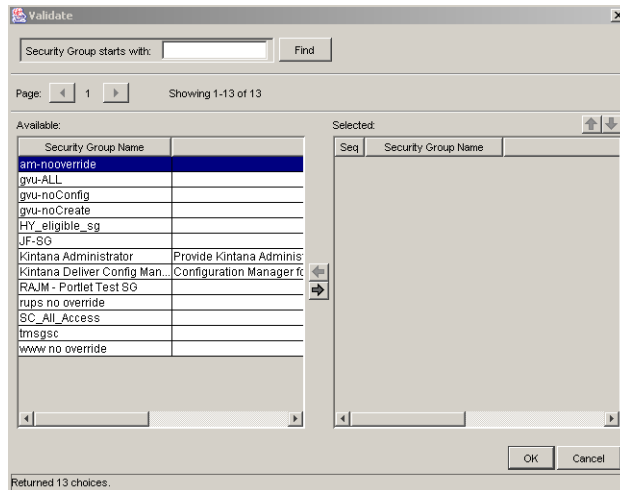
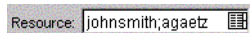


Figure A-5 Auto-Complete Multiple Selection window

To select more than one item from the auto-complete list:


1. Enter the values directly into the auto-complete field using a semi-colon to separate the entries.






or

1. Click the auto-complete icon.

The auto-complete's Validate page opens.

2. Select an entity to include from the available page.
3. Click the **Right** arrow button  to move the entity to the selected page.

Repeat the process to add additional entities. To remove an entity from the selected page, select the entity and click the **Left** arrow button . Move multiple entities by using Shift + click for adjacent entities or Ctrl + click for non-adjacent entities.

4. Move an item up or down in the selected page by selecting the entity and clicking the **Up** or **Down** arrows  .
5. Click **OK** to accept the multiple selections.

Dates

The date field is used to enter dates and time in any valid format. Mercury IT Governance Center automatically converts these dates into a standard format for the field. An example of a standard format is “March 15, 2001.”

Example valid date formats for “March 15, 2001” are:

- 3/15/2001
- 15-Mar-2001
- March 15, 2001 3:15 PM
(For a date with an associated time of 3:15)
- Valid date formats depend on the user’s locale.



Figure A-8 Date field



Note

Date fields must be entered using a valid date (time) format. If an invalid date format is entered, a message appears showing sample valid date entries. If the field also accepts time entries and an invalid format is entered, a message appears showing sample valid date and time entries.

Clicking the date field calendar icon opens a date selection page which populates the date field by selecting a date from a calendar. The date selection page shows dates, time, or both, depending on the source of the field. Display of dates, times, and numbers can be altered.

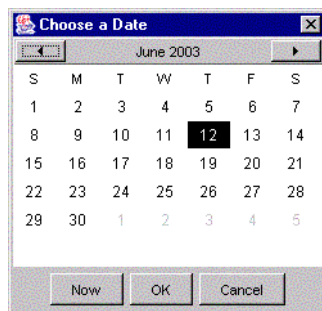


Figure A-9 Calendar

Drop Down List

Drop down lists feature a pull-down list of valid values. Fields are selected by clicking on the field and using the mouse to make a choice. Also, fields can be selected by tabbing into the field and using the up and down arrow keys, or tabbing into the field and entering the first letter of the targeted choice.

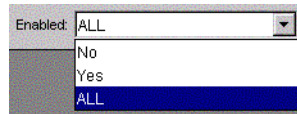


Figure A-10 Drop Down List field

Lists

Lists are used to display multiple records with multiple items. Click on a column heading to sort the list by the column heading. Resize columns by centering the cursor on the lines between adjoining headings. When the cursor changes to a double headed arrow, click and drag the bar to the required position. To switch the columns, hold down the mouse button on a column header and drag it to the desired location. Any changes made to the list are temporary and the list reverts to the default format at the next logon.

Category	Name
Config	Edit Workflows
Config	View Report Types
Config	View Notification Templates
Config	Edit Notification Templates
Config	View Validations
Config	View User Data
Config	Edit Validation Values
Config	Edit Validations
Config	Edit Special Commands
Config	Edit Report Types
Config	View Special Commands
Config	View Workflows
Config	Edit User Data

Figure A-11 List field

Radio Buttons

Radio buttons are used for fields where there are two or more choices. Selecting one option disables the other associated options. For example,

clicking **Yes** in a Yes/No radio button pair disables the No option. To select a choice, click the button to the left of the appropriate choice.



Figure A-12 Radio Button field

Text Areas



Text areas are generic entry fields. Text areas are displayed on multiple lines using a scroll bar, if necessary. Text areas can be configured with Field Help Icons (), providing specific information concerning the text area. Text areas can be pre-configured to only accept certain types of data, such as pure text or numbers. Non-conforming values cannot be entered into a text area. For example, entering the letter 'A' into a numeric text area is not accepted. In addition, text areas can be configured to accept only certain types of formats, such as Social Security numbers or telephone numbers.



Figure A-13 Text Area field

Text Fields

Text fields are generic entry fields. Text fields are displayed on a single line. Text fields can be configured with Field Help Icons (), providing specific information concerning the text fields. Text fields can be pre-configured to only accept certain types of data, such as pure text or numbers. Non-conforming values cannot be entered into a text fields. For example, entering the letter 'A' into a numeric field is not accepted. In addition, text fields can be configured to accept only certain types of formats, such as Social Security numbers or telephone numbers.

Creation Action Name:

Figure A-14 Text field

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