IT GOVERNANCE

MERCURY IT GOVERNANCE CENTER 5.5 OVERVIEW

MERCURY™

INTRODUCTION

IT governance is one of the most strategic, fast-growing segments in the Business Technology Optimization (BTO) market today. IT governance helps IT executives reduce cost and risk and ensure that IT is aligned with business objectives. In Release 5.5, Mercury focuses on key functional aspects of IT governance, including portfolio management as well as user interface and productivity enhancements. This document summarizes the major features of this release, which include:

- Portfolio Management
  - Best practices and unlimited scenarios for portfolio simulation and performance
  - Enhanced project scorecards, metrics, and ratings
  - Out-of-the-box best practice processes for proposals, projects, and assets

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- Better Information Access
  - Easier finding, organizing, personalizing, and displaying/printing of IT transaction data
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- Functional and Architectural Enhancements
  - J2EE app server, new caching engine, enhanced execution engine
- Integration with Mercury Quality Center™

Portfolio Management

Mercury Portfolio Management™ 5.5 helps IT executives tackle one of the biggest challenges in IT governance — optimizing the IT portfolio. Mercury Portfolio Management 5.5 provides new capabilities to help IT executives accelerate through the three most important steps to optimizing the IT portfolio:

1) Evaluate project demand against business objectives.

2) Prioritize projects and optimize the portfolio mix.

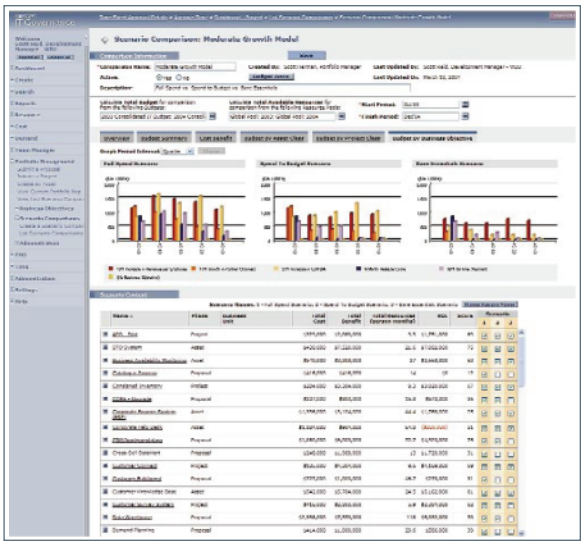
3) Implement enterprise best practices and views for managing proposals and projects.

In addition to Release 5.5, Mercury has packaged thousands of hours of consulting experience and our enterprise best practices in the new Mercury Portfolio Management Fast Start™ program. The Mercury Fast Start Program provides customers with a fully functioning portfolio view of their top 50 to 75 projects in two weeks. The Mercury Portfolio Management 5.5 release and the Fast Start program serve as the "starting block" for IT executives to take an enterprise approach to IT governance.

Mercury Portfolio Management 5.5 includes best practice processes to evaluate project demand against business objectives. Submitted ideas follow a defined process, including multiple reviews and the preparation of a high-level and detailed business case. Stakeholder approvals, resource estimates by FTE and/or skill, budget requirements, and expected benefits are captured for each proposed idea. As proposals take shape, they are scored by the business and IT against the business objectives and categories you define important to your business.

Proposals can be viewed alongside existing projects and assets supported by IT. By using common evaluation criteria and scores across these three portfolio elements, decision makers can optimize the portfolio mix by making intelligent choices on which proposals to approve and which to defer or cancel. A steering committee review and approval step is included in the process to ensure all stakeholders have a chance to be heard and difficult trade-off decisions can be made with confidence.

Mercury Portfolio Management 5.5 also includes support for an unlimited number of portfolio scenarios. Decision-makers can now evaluate funding, resource, and priority changes against multiple sample portfolios to optimize their IT portfolio for highest value at lowest overall risk. Benefits and capital requirements can be evaluated as well to ensure the portfolio delivers what is needed by the business.

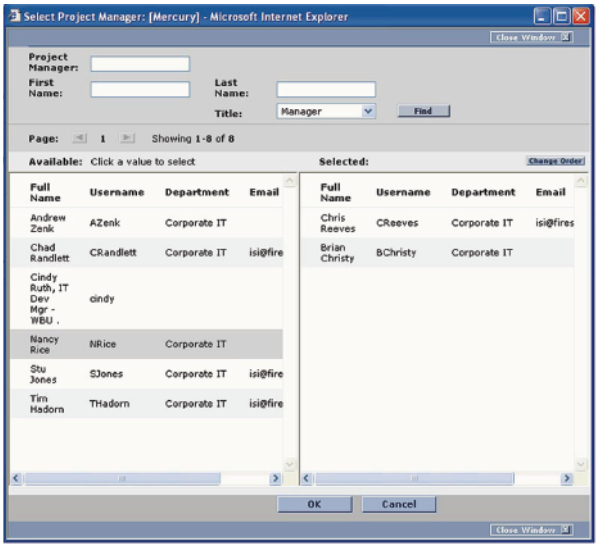


With Mercury Portfolio Management 5.5, you can use what-if scenarios to "slice-and-dice" your portfolio in many different ways to discern the business value of each project or the entire portfolio.

Dashboard Management and Propagation

In 5.0, Mercury IT Governance Dashboard Portlets were added manually to a user's desktop and could be modified by any user. Release 5.5 introduces two different ways to distribute portlets. One is to publish a set of non-end-user configurable portlets or Dashboard pages to a group(s) of end users. The other is to distribute end user configurable portlets to a group(s) of end users. Administrators can later reconfigure published portlets and republish them to automatically update end-users' dashboards. If administrators reconfigure distributed portlets, end users would need to re-add them for the reconfigurations to take effect. This improvement enables the propagation and management of enterprise standards for role-based views.

In the Publishing scenario, a "Module" is created that can contain one or more dashboard pages that are tailored to a set of users' needs. For example, a Program Manager Module can be configured to have a page with all program-related portlets. The administrator can then publish the Program Manager Module to all program managers at once. As new program managers are added, the same module can be published to them as well. Once a module is published, the administrator can remove or update it without worrying about overwriting user personalization.



The updated auto-complete provides specialized searching for users as well as easier navigation for selecting one or more values.

Distribution has much looser restrictions, since the administrator will not track the distributions. A single portlet, multiple portlets, page(s), and a module can be distributed automatically to a single end users' or multiple end users' dashboards. This allows the administrator to easily put a portlet on a specific end user's dashboard upon request, while providing end users with the flexibility to further personalize it.

In both scenarios, administrators can send out an e-mail notification to let the users know what has been done for them and how to use the newly updated dashboard. This will decrease the confusion of changing end users' view of their dashboards, and make it easier for end users to find what they need.

Information Access

Auto-Complete

One of the most heavily used components in the HTML interface is the auto-complete, used to pick a single value or multiple values from a list. Significantly improved with 5.5, auto-completes no longer return all values when a matching value is not found – and let the administrator/consultant determine what method of matching they wish to use for each auto-complete.

Auto-completes were limited by allowing only a single piece of text to represent the filter criteria. Even though a value returned by the auto-complete may have supporting column information, the filter had only been applied to the primary column. The system now allows additional columns to be defined as extra filters that can be used to pare down the results of a search. Additional filter criteria have been added to seeded validations for user/resource selection auto-completes.

Finally, the new auto-complete interface makes it much easier to select multiple values and see which values have been selected.

Custom Drill Down on Portlets

Drill downs from custom portlets (principally graphical ones) use a generic list page on drill down or maximize. The set of columns in the generic list were not always applicable for every portlet. Release 5.5 allows the administrator to define meaningful columns per request type. These meaningful or defined columns make information access easier by defaulting when the user:

- Performs advanced search on the request type.
- Is filtering portlet data on the request type.
- Drills down from a graphical portlet based on the request type.

Additional Format Masks

Release 5.5 introduces a custom data mask configuration for text fields beyond formatted numeric or alphanumeric, uppercase, and numeric. This enables the validation and display of standard formats like SSN, credit cards, and the validation and display of custom formats. A special data mask for telephone numbers is also included that handles both international and U.S. phone number formats. Numeric data masks have been enhanced to support more standard formats including a percentage format mask and a system wide currency component whose formatting can be controlled by individual validations.

Field and Portlet Help

Field definitions now include an additional component that allows administrators to specify the help content for the field. End users click on the help icon next to the field to view the help content for that field. Administrators can also specify help content for a Request Section as well as for the entire Request Type. Request Type and Request Header Type fields are supported in this release.

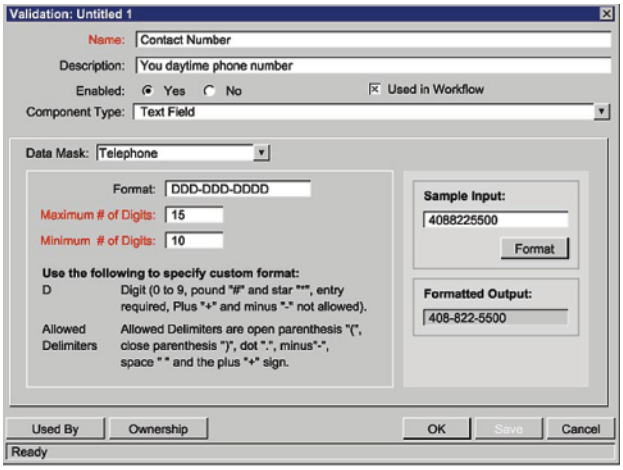
For portlets, administrators are able to specify the help content for a portlet through the Portlet Builder. Identical to field help, end users can click on the help icon of any portlet configured to view the appropriate help content.

List Sorting

Customer feedback indicated it was common for users to work with lists of 10 to 15 business objects in a portlet. To process each object, users frequently maximized the portlet and then processed each specific object. While the portlet has a sort option, they often wanted to change the sort while viewing the data, which wasn't possible without re-personalizing the portlet by changing the sort order. Release 5.5 allows users to re-sort data displayed in the portlet by simply clicking on a column header. List Sorting has been added to search pages as well; users can now sort search results by simply clicking on the column header.

Search – Support for Paging and Multiple Request Types

Before 5.5, Mercury IT Governance Center capped the number of search results it would return based on a configurable server setting. When a user performed a search that extended beyond the configured limitation, there was no clear indication to the user that additional data may exist. And, when data was returned there was no easy way to step through the large numbers of results because current search functionality did not support the paging that everyone has come to expect. In Release 5.5, the search results pages return the entire result set and allow the user to easily page back and forth through the results as they can on most Internet sites.



Custom fields can now be configured with a custom format mask to control display behavior within the application.

On a pre-5.5 search results page, it was also tedious to process the results of a search one by one because you would always have to return to the search page after drilling into the detail. Release 5.5 allows the user to navigate directly from one item in the list to the next or previous without returning to the search page or portlet.

Many customers also have different, yet similar Request Types and want to be able to search across multiple Request Types using common detail fields. In Release 5.5, Advanced Search allows users to search across multiple Request Types and provide search values for all of the fields they have in common.

Printable Requests and Timesheets

Release 5.5 provides a printer-friendly version of both Requests and Timesheets. Printing through the browser does not display all values because long text in text fields and text areas are cut off. Also, printing only a selected number of Request sections is not possible using the browser print option.

Now end users are able to easily print copies of requests and timesheets for their records and to prepare for meetings while away from a network connection. For Requests and Timesheets, the width of the pages is reduced to allow for printing without cutting off any of the fields. The full text of the fields is displayed, wrapping across as many lines as necessary. For requests users can select the sections they would like to see in the printed version, so that when they print the page, they see only the information they want.

Reporting Improvements

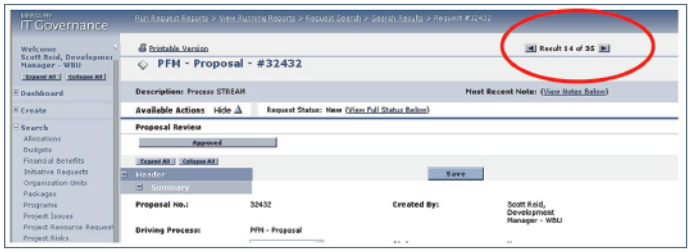
Release 5.5 solves the problem of runaway and inconsistent looking reports by introducing a new report architecture. The new reports have a consistent look-and-feel using Cascading Style Sheets (CSS) that support the Mercury brand and/or customer brand if they choose to modify the application look and feel. The new architecture also enables administrators to easily stop long-running reports in cases when selection criteria are too wide. Selected standard reports have been converted to the new report architecture, improving performance. Release 5.5 continues to support existing reports that were implemented in the previous report architecture.

Improved Team Collaboration and Notes Enhancements

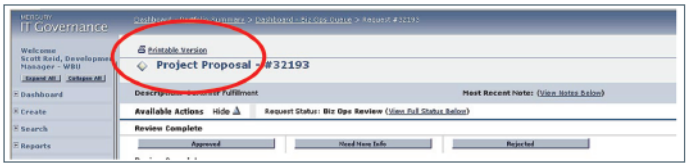
Mercury IT Governance Center's extensive use of Notes on Requests and other entities has helped users and teams improve communication through collaboration for many years. In Release 5.5, notes entries are broken into easier to distinguish note group blocks to help users follow the many specific conversations within the notes area.

The Release 5.0 Notes section contained both notes added by users as well as field changes (when notes history is enabled). While this is very useful for understanding how a Request has changed over time, these field changes often make it hard for a user to quickly read recent comments. Release 5.5 allows the end user to sort notes based on the type of entry.

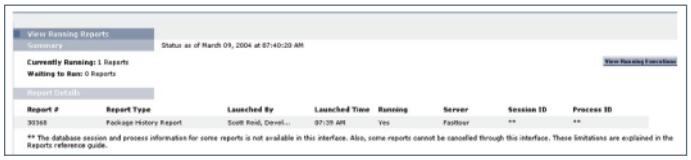
To further enable collaboration, Release 5.5 enables notes to be required on workflow transitions. This allows the administrator/consultant to design workflow transitions that require the end user to make a notes entry prior to completing a step.



When navigating to a record from search results or portlet maximize pages, you now have the ability to quickly move through the set of search results with next and previous arrows.



Requests and Timesheets now include a link at the top of the page that generates a printable version of the form.



Mercury IT Governance Center 5.5 includes a new feature that allows administrators to monitor and stop reports while they are running.

Also, the most recent note is now displayed at the top of the request details page and is available in request list portlets and in notifications, if desired.

Request Security Model

Extending the Participant Security Model, the Request Security Model in Release 5.5 addresses two important end-user requirements. First, it allows administrators to specify a user or group of users that can view, edit, delete, and/or cancel requests that may not be participants in the request process. Second, it provides a centralized place that an administrator can go, evaluate, and change security within a request type, enabling them to consolidate and reorganize the request security model (including the participant model). In essence it enables the administrator to clearly see and control who can do what on a request so they can manage security more effectively.

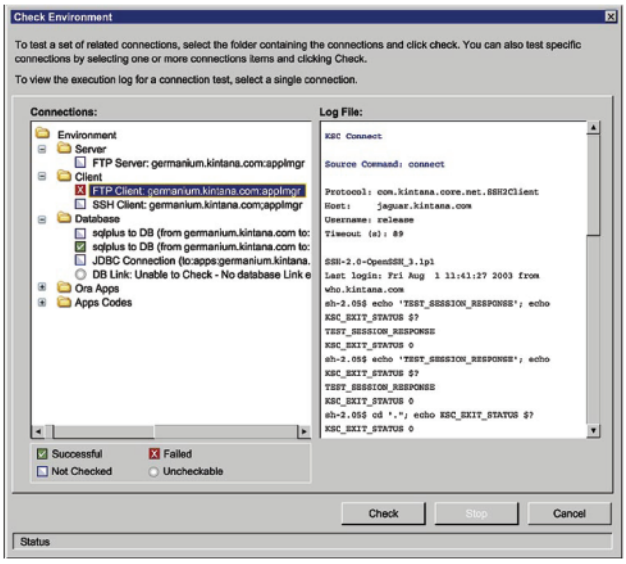
Functional and Architectural Enhancements

With Release 5.5, Mercury continues to push forward with its adoption of industry standards and open application frameworks. Release 5.5 is fully J2EE-compliant, and replaces the proprietary Mercury IT Governance application server (and Resin servlet container) with a standard J2EE application server (JBoss) and servlet engine.

Also, Mercury Change Management™ now supports the sequencing of package lines within and across packages based on timestamp or token value.

Execution Engine Improvements

The Execution Engine is a central component of Mercury's automation solutions. As usage of the Execution Engine has matured, we have identified several standard configurations that the majority of our customers now use for remote connectivity to servers. While these configurations can be supported with the current Execution Engine, each configuration required additional configuration time by the consultant/administrator during implementation and more support post-implementation.



The Environment Checker has been enhanced to provide much more detailed log information from attempts to validate a connection to an environment.

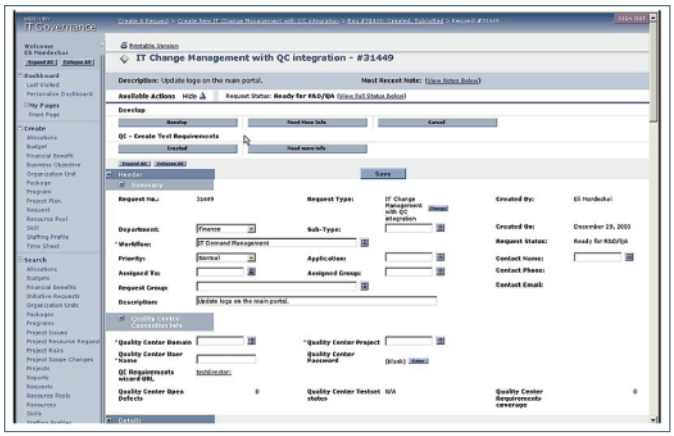
Release 5.5 can connect to more restrictive remote servers by negotiating a connection using the vt100 or vt220 terminal type. While the vt100 and vt220 terminals are specific Digital terminals, their "code set" has become a de-facto industry standard. Remote servers widely support connections under these terminal types.

The execution logs have also been enriched with more detailed diagnostic information for some specific types of failures. This allows the administrator to see which executions are running before shutting down the server. After the restart, the administrator can see which executions were interrupted by the server downtime. During the restart, the application server automatically updates these interrupted executions, marking them as failures. The server also moves their related workflows forward if any transition logic is configured to handle failures.

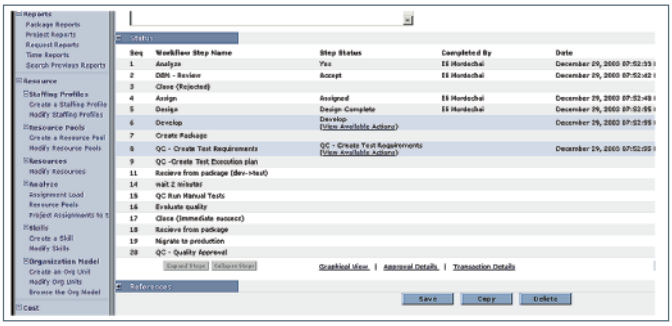
Also, in Release 5.5, the Environment Checker uses the standard connection logic, and produces descriptive logs in the standard format. The Environment Checker has also been extended with logic to test for problems issuing long commands and the timeout value entered by the administrator directly controls the connection timeout threshold.

Integration with Mercury Quality Center

Release 5.5 of Mercury IT Governance Center now offers integration with Mercury Quality Center to deliver an "out-of the-box" Software Development Lifecycle solution (SDLC) for application changes that can also be configured to the specific needs of your business. The integration enables Mercury IT Governance Center to jointly manage application change deployment with test preparation, execution, and reporting in Mercury Quality Center. The result is more effective delivery and management of application software changes from demand to production. Specific integration enhancements include:



Integration with Mercury Quality Center provides the user with detailed test information directly from a Request in Mercury Demand Management.



IT Governance Center 5.5 includes integration with Mercury Quality Center that allows you to track status updates on both the change request and test sets from a single screen.

- Quality Center APIs to:
  - Automatically execute test sets.
  - Retrieve test set status information.
  - Link test requirements, plans, sets, and defects to the approved ITG change request.
- Mercury IT Governance Center Seeded request types, workflows, special commands, and services to:
  - Automatically trigger test set execution.
  - Retrieve quality metrics and test status.
  - Enforce and digitize notifications, reviews, and approvals of testing requirements, plans, sets, and results within the application change process.
  - Update quality data on change requests.

Lastly, Quality Center Dashboard Portlets for displaying to do items and relevant quality metrics can be added to Mercury IT Governance Dashboard pages.

Access to Release 5.5 Features: The specific Mercury IT Governance Center license that a current user has determines which new features in Release 5.5 he or she is able to access.

Please contact your Mercury Account Manager for details or to learn more about Mercury IT Governance Center 5.5.

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