

# Mercury™ IT Governance Center

Managing Your Portfolio  
(Portfolio Management)

Version 5.5.0

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# Chapter 1 Introduction

Mercury Portfolio Management provides a real-time governance setup that supports your strategic, financial, functional, and technical requirements. Ideal for new initiatives that grow and transform your business as well as existing applications that run your business, Portfolio Management can help you align your IT portfolio with your business strategy and maximize portfolio value.

Portfolio Management allows business and IT stakeholders to collaboratively govern your portfolio with proper levels of review and approval. Portfolio Management monitors the entire portfolio lifecycle (proposal justification and review, project initiation, execution, deployment, and benefits realization) and enables stakeholders to make better portfolio decisions and analyze what-if scenarios using easy-to-build scenario comparisons.

## About This Document

This guide describes how to navigate and use Portfolio Management. Each chapter covers a specific topic on navigation or usage:

<i>Key Concepts</i>	Defines the key concepts and definitions used when configuring Portfolio Management.
<i>Building Your Portfolio</i>	Explains how to create your Portfolio and the entities associated with it.
<i>Viewing Your Portfolio</i>	Explains how to analyze your current Portfolio.
<i>What-If Analysis</i>	Explains how to use Scenario Comparisons in Portfolio Management to perform what-if analysis on your current Portfolio.

<i>User Licensing and Access</i>	Describes the security settings surrounding Portfolio Management and its key functionality.
<i>Portfolio Management and the Mercury ITG Dashboard</i>	Defines the Portlets delivered with Portfolio Management.

## Intended Audience

The intended audience for this document include:

- Users of Portfolio Management
- Managers who create and manage Proposals, Projects, and Assets
- Business users responsible for reporting on their Portfolio

## Document Conventions




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

*Table 1-1. Document conventions*

Convention	Description	Example
<b>Button, menu, tabs</b>	Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold.	<b>Apply</b> 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
<i>Link</i>	Linked URLs, filenames, and cross references are shown as blue italicized text.	<i><a href="http://www.mercury.com">www.mercury.com</a></i>
<i>Variable</i>	Variables are shown as italicized text.	<i>ITG_Home/bin</i> directory



Table 1-1. Document conventions

Convention	Description	Example
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 help you successfully use Portfolio Management:

- [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 ITG Dashboard and custom Portlets.

Processing Requests (Demand Management)

This document explains how to process Requests using Demand Management. The Portfolio Management entities are processed identically to Requests.

Managing Your Projects (Project Management)	This document explains how to work with Project Plans using Project Management.
Using the Workbench	This document explains how to use the Workbench interface.
Security Model Guide and Reference	This document presents an overview of the data security model and provides instructions for controlling access to different Mercury ITG screens and functions.
Managing Your Resources (Resource Management)	This document provides instructions for managing your Resources. This includes modeling your Organizations, setting up Resource Categories and Calendars, creating Staffing Profiles and Resource Pools, and visualizing Resource load and capacity across the system.

## Customer Support

Customer support for the ITG Suite 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 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 the common concepts and terms related to Mercury Portfolio Management:

- *Portfolio Management*
- *The Portfolio Lifecycle*
- *Proposals*
- *Projects*
- *Assets*
- *Budget*
- *Financial Benefit*
- *Staffing Profile*
- *Return on Investment (ROI)*
- *Net Present Value (NPV)*
- *Using a Custom Metric*
- *Project Class*
- *Asset Class*
- *Qualitative Scoring*
- *Business Objective*
- *Business Unit*
- *What-If Analysis*
- *Portfolio Management Entities and Processes*

## Portfolio Management

Portfolio management is the practice of creating and analyzing a Portfolio, composed of *Proposals*, *Projects*, and *Assets*, to help achieve a company or *Business Unit*'s immediate and strategic goals. Mercury Portfolio Management handles the following key areas of Portfolio management:

- **Project initiation**  
Most initiatives begin as Proposals, which go through a review process before being approved. Once approved, Proposals trigger the creation of corresponding Projects. When a Project is created, the current Portfolio is created, and all subsequent Projects and Assets belonging to the Business Unit are automatically added to the Portfolio.
- **Project prioritization and categorization**  
Portfolio Management entities can be categorized either by *Project Class* or *Asset Class*, and assigned a priority from a configurable list of values.
- **As-is analysis**  
Portfolio Management provides a number of visualizations and portlets that can be used to analyze various aspects of the current Portfolio.
- **Scenario analysis (what-if analysis)**  
Portfolio Management supports the ability to rapidly assemble scenarios that model potential project portfolios to perform *What-If Analysis*. These scenarios can then be examined and compared with each other using a number of different visualizations.
- **Benefit realization**  
The *Financial Benefit* entity helps quantify the benefit of a Proposal, Project, or Asset. Financial Benefits can be used in Portfolio Management visualizations and analyses.

## The Portfolio Lifecycle

Your Portfolio contains the active Projects and Assets in your business unit. Each of these have a set of attributes common to each other, such as budgets, estimates of resource usage, and return on investment (ROI), that can be used to analyze the Portfolio. *Figure 2-1* shows the Current Portfolio Map portlet displaying active Projects and Assets graphed by budget and ROI, scaled to amount of Resource usage and separated by type.

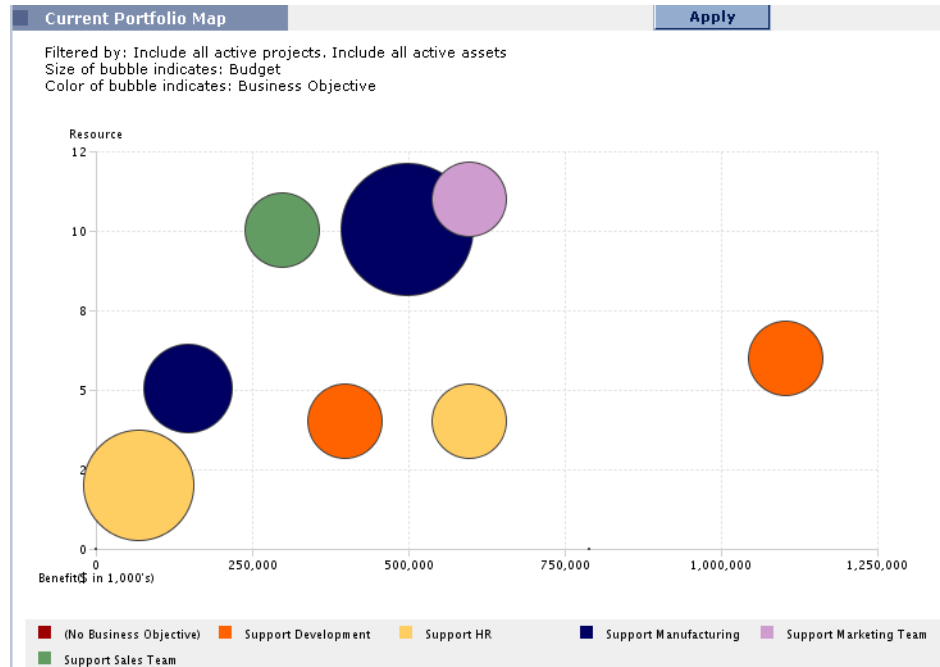


Figure 2-1 Current Portfolio Map portlet

Your Portfolio, which shows only Projects and Assets, is created when a Project is created or a Proposal is approved. Once the Proposal is approved, it generates a corresponding Project. When a Project reaches completion, a corresponding Asset is created. Projects and Assets can also be created from scratch. *Figure 2-2* illustrates the Portfolio lifecycle.

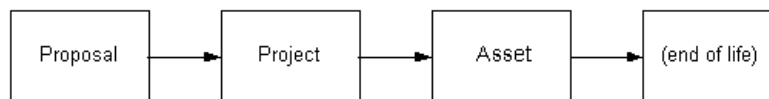


Figure 2-2 Portfolio Lifecycle

All active Projects and Assets are counted as part of the Portfolio, and are used in *What-If Analysis* along with Proposals.

## Proposals

Proposals are entities created and used to justify a Project. In Portfolio Management, a Proposal collects all the information needed to make a decision about a proposed Project. This information can include:

- Business Objective
- Scoring information
- Requirements document
- Budget

Once submitted, Proposals progress along a pre-configured Proposal process toward resolution. If a Proposal is approved, a corresponding Project is automatically generated, as well as a corresponding Budget, Staffing Profile, and Financial Benefit.



Note

The Portfolio Management entities are customizable. The Proposal being used by your business unit may differ from the Proposal initially delivered with Portfolio Management.

## Projects

The Project collects and tracks all the information needed to describe the initiative. This information can include:

- Project Sponsor
- Project Class
- Staffing Profile

Once created, Projects progress along the a pre-configured process toward completion. When a Project is finished, a corresponding Asset is automatically generated, as well as a corresponding Budget, Staffing Profile, and Financial Benefit. Projects can also be created from scratch without originating from a Proposal.



The Portfolio Management entities are customizable. The Project being used by your business unit may differ from the Project initially delivered with Portfolio Management.

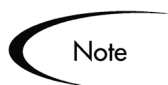
Though Projects in Portfolio Management are distinct from Project Plans in Project Management, Portfolio Management Projects can be linked to Project Plans for information purposes.

## Assets

A Portfolio Management Asset collects all the information needed to describe a completed Project that still requires a budget and assets to keep going, yet has no actual activity running against it. This information can include:

- Financial Benefit
- Asset Class
- Supervisor

Once created, Assets periodically move through a review cycle. When an Asset is reviewed and found to be no longer worthwhile to keep around, it is closed. Closed assets are not considered part of the Portfolio.



The Portfolio Management entities are customizable. The Asset being used by your business unit may differ from the Asset initially delivered with Portfolio Management.

## Budget

A Budget indicates an allocation of money to be spent between specific start and finish dates. Between these dates, the Budget specifies the money available for each time period (either quarterly or monthly). Entries in a Budget can be set for labor or non-labor categories. Budgets are associated

with all Portfolio Management entities, and are copied when they transition from one type to another (Proposal to Project, Project to Asset).

## Financial Benefit

A Financial Benefit tracks the monetary benefit (such as savings and revenue) that a Project or Asset is providing. Financial Benefits are used in a manner similar to Budgets for analyzing the current Portfolio benefits. They are also used for making decisions when building scenarios for *What-If Analysis*. Financial Benefits also give the user the ability to provide cost/benefit and ROI analysis. Financial Benefits are associated with all Portfolio Management entities.

## Staffing Profile

A Staffing Profile specifies an allocation of Resources between specified start and finish dates. Between these dates, the Staffing Profile specifies the skill and Resources allocated for each period. Each line in a Staffing Profile indicates an allocation of one or more Resources in specified time periods. The line can designate a skill or a specific Resource in the Mercury ITG system. *Figure 2-3* shows a Staffing Profile with a single line.



Note

The level of resourcing within each fiscal month is expressed as the number of “Full Time Equivalents” (“FTE”), or the equivalent number of full-time Resources.



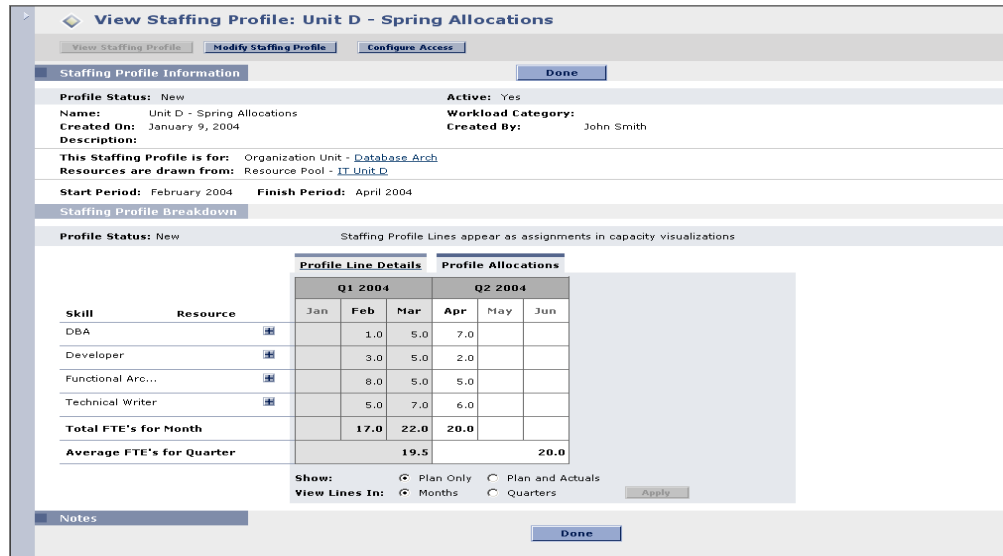


Figure 2-3 Staffing Profile

## Return on Investment (ROI)

Return on Investment (ROI) is a financial metric that compares expected benefit against actual costs for a Portfolio Management entity. It appears in all Portfolio Management entities, and can be used in Portfolio Management visualizations and analyses. *Figure 2-4* shows the Current Portfolio Map portlet using ROI on the graph's y-axis.

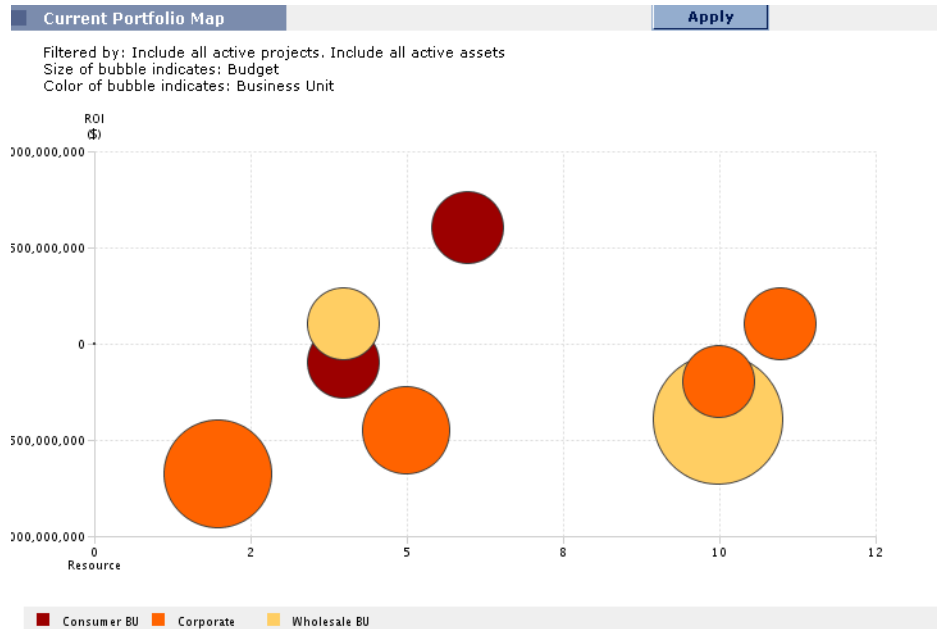


Figure 2-4 Current Portfolio Map graph with ROI on Y axis

ROI for a Portfolio Management entity is calculated automatically upon save.

## Net Present Value (NPV)

Net Present Value (NPV) is another financial metric calculated in a manner similar to ROI, but discounts future cash flows based on a user-input cost of capital. It appears in all Portfolio Management entities, and can be used in Portfolio Management visualizations and analyses. [Figure 2-5](#) shows the Current Portfolio Map portlet using NPV on the graph's y-axis.

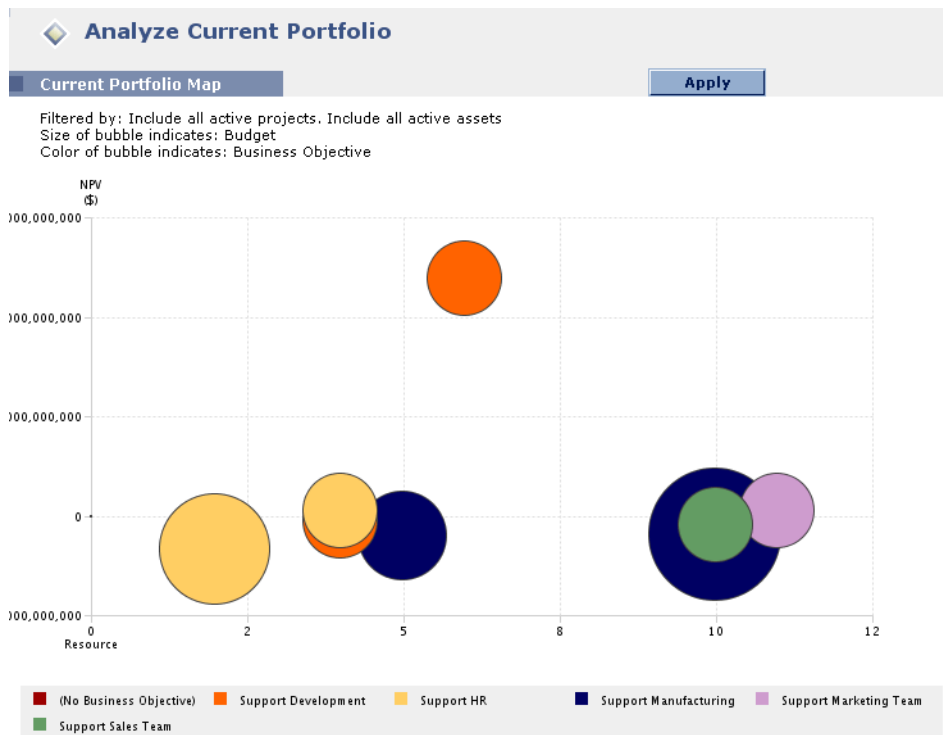


Figure 2-5 Current Portfolio Map graph with NPV on Y axis

NPV for a Portfolio Management entity is calculated automatically upon save.

## Using a Custom Metric

If neither ROI nor NPV are satisfactory financial metrics to use in gauging Portfolio success, a custom metric can be used. The custom metric must be configured and added to all Portfolio Management entities. After configuration, the custom value will appear in all modified Portfolio Management entities. It can also be used in Portfolio Management visualizations and analyses.



Example

Company A decides to configure the custom value to be a field called Productivity Index, calculated using fields in each entity including Risk ratings.

See “Using a Custom Portfolio Management Metric” in “*Configuring Portfolio Management*” for more detailed information on configuring the custom value.

## Project Class

The Project Class is a classification of Portfolio Management entities according to the expected area of benefit. Some examples of Project Classes include:

- **Core (Keep the Lights On)**  
These projects maintain existing business applications and services. This includes upgrades of technology, infrastructure, and applications that are already in place, as well as non-discretionary regulatory changes. It should not include projects that provide any significant enhancement of business activities. Example projects: Bug fixing project for an existing application, or implementing better audit controls required of a regulatory agency.
- **Efficiency**  
These projects help automate the basic transactions of a company. They are intended to reduce costs and boost productivity by improving business processes and operational overhead. Example projects: Automating password resets, processing automation for employee provisioning, or implementing self-Service HR portal.
- **Growth**  
These projects contribute directly to significant improvements in enterprise performance. Better performance is measured in speed, convenience, cost of business operations, working capital requirements, and quality. They often support competitive differentiation and sales growth. Example projects: Implementation of CRM, or supply chain planning.
- **Innovation**  
These projects, when successful, make a major change to business performance. They typically broaden the company’s reach of new markets or change the competitive landscape. Example projects: Starting an application service provider model for services normally delivered in traditional services model, or re-engineer product lifecycle development to increase time-to-market by 50%.

Proposals, Projects, and Assets can be classified according to Project Class, [Asset Class](#), or both simultaneously. The selected category is tracked throughout the Portfolio Management system.

## Asset Class

Asset Class is a way of classifying Portfolio Management entities according to the type of initiative being considered. Some examples of Asset Class values include:

- **Infrastructure**  
These investments provide a shared and standardized base of capability for the enterprise and lead to greater business flexibility and integration. Example projects: Networks, servers, PC upgrades, development tools, training and help desk, and disaster recovery.
- **Transactional**  
These IT initiatives process and automate the basic transactions of a company. They may involve some informational aspects but primarily provide applications for transactions processing. They are intended to reduce costs and boost productivity. Example projects: Payroll or order management.
- **Informational**  
These projects create systems that provide information for managing a company. Their value is in improved depth, quality, and timeliness of information to make business decisions. Their payoff often comes from shorter time-to-market and the ability to set premium prices. Example projects: Knowledge management system or employee portal.

Proposals, Projects, and Assets can be classified according to Asset Class, *Project Class*, or both simultaneously. The selected category is tracked throughout the Portfolio Management system.

## Qualitative Scoring

Proposals, Projects, and Assets often need to be ranked according to qualitative criteria that are not captured by purely numeric values of cost, resource requirement, and benefit. This information is typically considered by review boards and can include such criteria as:

- How much technical risk exists
- How well it matches with strategic goals
- How much competitive advantage would be gained

Portfolio Management entities include a set of fields designed to capture this type of qualitative scoring. Each field is associated with a weighted value, and the total of all the weighted values yields a score for the given Proposal, Project, or Asset. A set of Business as well as Technical scoring criteria are included with each Portfolio Management entity. However, a qualified Portfolio Management user can easily modify the standard fields or add custom criteria based on their specific requirements.

## Score Adjustment

There may be situations when a specific project has a calculated score that is either lower or higher than “it should be” compared to other projects. It may be possible that the set of qualitative criteria does not capture something about the project. In this case, the score may need a total score adjustment based on someone’s qualified perspective (e.g. a project sponsor). An adjustment field is provided in all Portfolio Management entities that adds or subtracts (if negative) from the total score.

## Scoring Key

To help visualize the qualitative scoring setup, a scoring key is provided with Portfolio Management that combines all of the scoring information and displays it in an easy-to-read format. This scoring key can be edited by users with the proper level of access. *Figure 2-6* shows an example scoring key.

Dashboard - Front Page > View Scoring Criteria

**View Scoring Criteria**

Scoring Keys Done

Weight	Criterion	Value	Selection
<b>Risk Domain</b>			
3	Technical Risk	0	No uncertainty.
		1	Very low uncertainty.
		2	Low uncertainty.
		3	Medium uncertainty.
		4	High uncertainty.
2	Architecture Risk	5	Unknown.
		0	Utilizes standard architecture.
		1	Minor change to standard architecture.
		2	Medium change to standard architecture.
		3	Major change to standard architecture.
2	Definition Risk	5	No leverage of standard architecture.
		0	Requirements are firm. No changes.
		1	Requirements are moderately firm. Low probability of changes.
		2	Requirements are moderately firm. Medium probability of changes.
		3	Requirements are moderately firm. High probability of changes.
1	Infrastructure Risk	4	Requirements are not firm.
		0	Uses existing systems and services.
		1	Small changes to existing infrastructure.
		2	Small changes and additions are expected.
		3	Moderate changes are expected.
1	Organization Risk	4	Moderate changes to multiple systems are expected.
		5	Substantial changes to infrastructure are expected.
		0	No risk.
		1	Low risk.
		2	Medium low risk.
10	Internal Rate of Return	3	Medium risk.
		4	High risk.
		5	Extreme risk.
		0	Zero or less.
		1	1 - 5.99%.
5	Competitive Advantage	2	6 - 9.99%.
		3	10 - 14.99%.
		4	15% and above.
		0	No client or market impact.
		1	Improves operating efficiencies that affect competitive position.
5	Strategic Match	2	Improves operating efficiencies in strategic area.
		3	Provides some degree of outside access.
		4	Provides moderate degree of outside access.
		5	Provides high level of outside access.
		0	No impacted business goals.
2	Competitive Response	1	No impacted goal. Increases operational efficiency.
		2	No direct impact of goal, but prerequisite.
		3	Direct impact on a portion of a goal.
		4	Direct achievement of a goal.
		5	Direct achievement of multiple goals.
2	Productivity	0	Can be postponed for 12 months with no effect on competitive positioning.
		1	Can be postponed for 12 months with minimal effect to competitive positioning.
		2	Can be postponed for 12 months with significant effect to competitive positioning.
		3	Postponement will result in loss of competitive positioning.
		5	Postponement will result in complete loss of competitive positioning.

Done

Copyright © 2004 Mercury

Figure 2-6 Qualitative Scoring Key

## Business Objective

Business Objectives are a set of business goals that can be prioritized and tied to Portfolio Management entities. Business Objectives can be created, modified, and deleted independently of Portfolio Management entities.



ACME Corporation creates a Business Objective, “Reduce order to delivery time.” This Objective is assigned a priority and associated with a Project created as part of the initiative to upgrade ACME’s Customer Service system.

## Business Unit

Enterprises are often partitioned into several Business Units. Each Business Unit may have its own Portfolio to manage. All Portfolio Management visualizations and analyses, as well as scenario comparisons used in *What-If Analysis*, have the option to filter and display data based on Business Unit.

## What-If Analysis

What-if analysis reveals the consequences of Portfolio-related decisions without having to make costly purchases and initiate potentially unnecessary projects. It empowers the users of Portfolio Management to make the right decisions the first time.

Mercury ITG supports the ability to rapidly assemble scenarios that model potential project portfolios to perform what-if analysis. These scenarios can then be examined and compared with each other using a number of different visualizations.

## Scenario Comparisons

Scenario Comparisons are the means by which users maintain and analyze groups of scenarios. Each Scenario Comparison contains three scenarios that are built from a set of Proposals, Projects, and Assets. *Figure 2-7* shows an example Scenario Comparison.



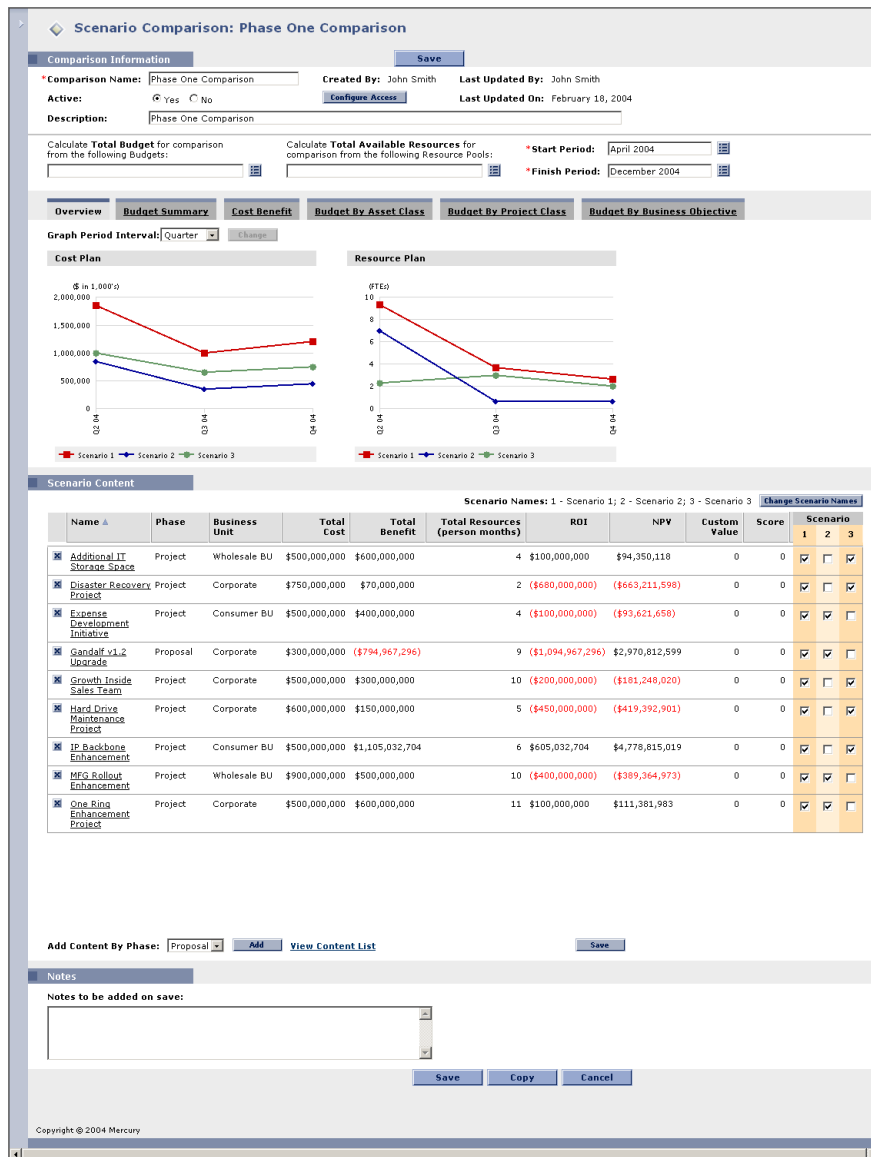


Figure 2-7 Scenario Comparison Page

Scenario Comparisons can be built up from the ground by assembling any set of Proposals, Projects, and Assets. Users can also quickly create a set that resembles the currently implemented portfolio with the option to include submitted proposals.

## Portfolio Management Entities and Processes

The Portfolio Management entities (Proposals, Projects, Assets) are configurable.

- Certain fields in the Portfolio Management entities can be customized.
- Portfolio Management entities can be copied, and these copies can be altered.
- It is also possible that your company has developed its own processes for portfolio-related business matters, and that these processes were implemented as Workflows with associated Request Types in the Mercury ITG Center. These Request Types can be modified for use with Portfolio Management with the use of Field Groups.

All of these alterations can be made through the Mercury ITG Workbench, using the **Request Types** screen.

- For more information on the Portfolio Management entities and Request Types, see *"Configuring Portfolio Management"*.
- For more information on altering Request Types in general, see *"Configuring a Request Resolution System"*.

During their lifecycle, Portfolio Management entities progress through pre-configured resolution processes. These processes can also be altered in the following ways:

- The existing processes delivered with Portfolio Management can be changed.
- Portfolio Management processes can be copied, and these copies can be altered.
- It is also possible that your company has developed its own processes for portfolio-related business matters, and that these processes were implemented as Workflows with associated Request Types in the Mercury ITG Center. These Workflows can be configured for use with Portfolio Management.

All of these changes are made through the Workbench, using the **Workflows** screen.

- For more information on the Portfolio Management processes and Workflows, see *"Configuring Portfolio Management"*.
- For more information on altering Workflows in general, see *"Configuring a Request Resolution System"*.

The Portfolio Management entities can interoperate with their processes in a variety of combinations:

- A single Workflow can be used by multiple Request Types. You may have three different kinds of Proposal that all use the same Proposal Workflow.
- A single Request Type can use different Workflows. You may have a single Proposal that could be processed along one of many possible Proposal Workflows.

For more information on Request Type/Workflow interaction, see "*Configuring a Request Resolution System*".



# Chapter 3

## Building Your Portfolio

This chapter explains how to create Proposals, Projects, Assets, and other entities associated with Portfolio Management. A Portfolio is automatically created when a Proposal is submitted. All subsequent Projects, and Assets become part of the current Portfolio.

The following topics are covered:

- *Creating Proposals*
- *Creating Projects*
- *Creating Assets*
- *Creating a Budget*
- *Creating a Financial Benefit*
- *Creating Business Objectives*
- *Creating Staffing Profiles*

## Creating Proposals

The Proposal collects all the information needed to make a decision about a proposed Project. Once submitted, Proposals progress along a pre-defined business process toward resolution.

### **To submit a Proposal:**

1. Log onto Portfolio Management.
2. From the navigation bar, select **Portfolio Management > Submit a Proposal**.

3. Fill in all required fields and any optional fields.
4. Click **Submit**.

The Proposal begins processing along its resolution process.

## Creating Projects

A Project gathers the information for, records actions taken on, and reflects the current status of an initiative currently being worked on. All active Projects count as part of the Portfolio.

A Project is created automatically when a Proposal is approved, carrying over relevant information and entities. Projects can also be created from scratch.

The following sections discuss these methods of Project creation in more detail:

- [Spawning Projects from Proposals](#)
- [Creating Projects from Scratch](#)

## Spawning Projects from Proposals

When a Proposal is approved, a corresponding Project is automatically created. The Budget, Staffing Profile, and Financial Benefit attached to the Proposal are also copied, and the copies attached to the new Project.



Note

The original Proposal Budget, Staffing Profile, and Financial Benefit can be used as a baseline to be compared with the Project Budget and Staffing Profile.

Proposal field values automatically copied into the Project are described in [Table 3-1](#):

*Table 3-1. Defaulted Project Fields*

Field	Description
Business Unit	The business unit from which this Project originated.

Table 3-1. Defaulted Project Fields

Field	Description
Project Name	The name of the proposed project.
Project Class	The class of Project this Project belongs to (ex. <b>Innovation</b> ).
Asset Class	The class of Asset this Project belongs to (ex. <b>Strategic</b> ).
Business Objective	The business objective with which the Project is aligned.
Project Manager	The manager of the Project.
Budget	The proposed Budget for the Project.
Financial Benefit	Tracks the monetary benefit the Project would provide.
Staffing Profile	Tracks the Resource demand of the Project.
Net Present Value	The NPV for the Project.
Return on Investment	The ROI for the Project.
(Custom Field Value)	If defined, the custom metric being used to rank the Project.
Value Rating	The total qualitative Value calculated for the Project.
Risk Rating	The total qualitative Risk calculated for the Project.
Total Score	The total qualitative score (Value - Risk) calculated for the Project. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this Project, if any.

## Creating Projects from Scratch

Projects can also be created from scratch, bypassing the proposal process.

### To create a Project:

1. Select **Portfolio Management > Initiate a Project** from the navigation bar.
2. Fill in all required fields and any optional fields.

Portfolio Management can be configured in a way that also requires you to create a Budget, Staffing Profile, and Financial Benefit to attach to the

Project. See “*Creating a Budget*” on page 28 and “*Creating Staffing Profiles*” on page 35 for more detailed information.

3. Click **Submit**.
4. The Project becomes active.

## Creating Assets

An Asset gathers the information for, records actions taken on, and reflects the current status of an active Asset. All active Assets count as part of the Portfolio.

An Asset is created automatically when a Project is completed, carrying over relevant information and entities. Assets can also be created from scratch.

The following sections discuss these methods of Asset creation in more detail:

- *Spawning Assets from Projects*
- *Creating Assets from Scratch*

## Spawning Assets from Projects

When a Project is completed, a corresponding Asset is automatically created. The Budget, Staffing Profile, and Financial Benefit attached to the Project are also copied and attached to the new Asset.



Note

The original Project Budget, Staffing Profile, and Financial Benefit can be used as a baseline to be compared with the Asset Budget and Staffing Profile.

Project field values automatically copied into the Asset are described in *Table 3-2*:

*Table 3-2. Defaulted Asset Fields*

Field	Description
Business Unit	The business unit in charge of the portfolio this Asset is a part of.



Table 3-2. Defaulted Asset Fields

Field	Description
Asset Name	The name of the Asset.
Asset Health	The status of the Asset.
Project Class	The class of Project this Asset belongs to (ex. <b>Innovation</b> ).
Asset Class	The class of Asset this Asset belongs to (ex. <b>Strategic</b> ).
Business Objective	The business objective with which the Asset is aligned.
Project Manager	The manager of the Asset.
Project Plan	The Project Plan in Project Management that is associated with the Asset.
Budget	The Budget for the Asset.
Financial Benefit	Tracks the monetary benefit the Asset provides.
Staffing Profile	Tracks the Resource demand of the Asset.
Net Present Value	The NPV for the Asset.
Return on Investment	The ROI for the Asset.
(Custom Field Value)	If defined, the custom metric being used to rank the Asset.
Value Rating	The total qualitative Value calculated for the Asset.
Risk Rating	The total qualitative Risk calculated for the Asset.
Total Score	The total qualitative score (Value - Risk) calculated for the Asset. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this Asset, if any.

## Creating Assets from Scratch

Assets can also be created from scratch, bypassing the Proposal or Project process.

### To create an Asset:

1. Select **Portfolio Management > Create an Asset** from the navigation bar.
2. Fill in all required fields and any optional fields.

Portfolio Management can be configured in a way that also requires you to create a Budget, Staffing Profile, and Financial Benefit to attach to the Asset. See “[Creating a Budget](#)” on page 28 and “[Creating Staffing Profiles](#)” on page 35 for more detailed information.

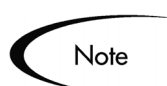
3. Click **Submit**.
4. The Asset is now active in the system.

## Creating a Budget

A Budget indicates an allocation of money between specific start and finish dates. Between these dates, the Budget specifies the money available for each time period (usually a calendar month).


Budgets have many key aspects that can be configured:

- A Budget can be associated with a Proposal, Project, or Asset in a 1:1 manner.
- A Budget has lines that can be modified individually.
- A Budget can have specific users allowed to access it.
- Budgets have statuses associated with them (New, Proposed, Under Review, etc.) that can be updated.



Note

By default, Budget amounts are always entered in terms of whole thousands. This setting can be changed by a qualified Mercury ITG Center administrator.

Budgets can be created at any time and then linked to a Portfolio Management entity through the Budget field, or created directly from the Portfolio Management entity by clicking on the  next to the Budget field.

### To create a Budget:

1. Log onto Portfolio Management.
2. From the navigation bar, select **Create > Budget**.

The Create a New Budget page opens.

**Create New Budget**

**Budget Information**

\*Budget Name: Sales Integration Budget

**Time Range**

\*Start Period: March 2004

\*Finish Period: May 2004

Continue Cancel

3. Enter the Budget Name, Start Period, and Finish Period.
4. Click **Continue**.

The Create a New Budget: Enter Details page opens.

**Create New Budget: Enter Details**

[Configure Access](#)

**Budget Information** [Create](#) [Cancel](#)

Status:  Active:  Yes  No

\*Name:

Created On: February 18, 2004 Created By: John Smith

Description:

This Budget is for:  This Budget rolls up to:

Start Period: March 2004 Finish Period: May 2004 [Change Periods](#)

**Budget Summary**

Planned Budget		Actual Budget	
CapEx Total:	\$0	CapEx Total:	\$0
OpEx Total:	\$0	OpEx Total:	\$0
<b>Total Planned Budget:</b>	<b>\$0</b>	<b>Total Actual Budget:</b>	<b>\$0</b>

**Budget Breakdown**

Budget Status: New Show:  Plan Only  Plan and Actuals

Enter Lines In:  Months  Quarters [Apply](#)

**Add Budget Lines:** [Add](#)

Type Category Expense Type

Please use the Add button to add lines to this Budget.

[Remove Lines](#)

Budget Breakdown from March 2004 to May 2004						
	Q1 2004			Q2 2004		
	Jan	Feb	Mar	Apr	May	Jun
CapEx Month Total			0	0	0	
OpEx Month Total			0	0	0	
<b>Month Total</b>			<b>0</b>	<b>0</b>	<b>0</b>	
CapEx Quarter Total			0			0
OpEx Quarter Total			0			0
<b>Quarter Total</b>			<b>0</b>			<b>0</b>

\*\*all numbers in the table are in 1000's

**Notes**

Notes to be added on save:

[Create](#) [Cancel](#)

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5. (optional) Enter any desired information in the Budget Information section.
6. Add lines to the Budget:
  - a. Scroll down to the Budget Breakdown section.
  - b. Enter the number of lines you wish to add to the Budget.
  - c. Click **Add**.

The Add Lines to Budget page opens.

**Add Lines to Budget: Sales Integration Budget**

**Enter Line Information**

Budget Line has been added:  
**Type:** Labor, **Category:** Contractor, **Expense Type:** Operating

---

**Name:** Sales Integration Budget **Status:** New

---

\***Type:** Labor \***Category:** Employee **Expense Type:** Operating

- d. Specify a Type, Category, and Expense Type for each Budget line.
- e. Click **Add**.

The Create a New Budget: Enter Details page opens again, with the new Budget lines added.

- 7. Enter amounts for each Budget line and period and click **Save**.
- 8. (optional) If you wish to track actual amounts for your Budget alongside the planned amounts, click the Planned and Actuals option in the Show line and click **Refresh**.

The Create a New Budget: Enter Details page will reload and enable the Act fields. You can then fill in actual values next to the planned amounts in the Budget's columns.

**Budget Breakdown**

**Budget Status:** New **Show:**  Plan Only  Plan and Actuals **Enter Lines In:**  Months  Quarters


Budget Breakdown from March 2004 to May 2004													
Q1 2004						Q2 2004							
Jan		Feb		Mar		Apr		May		Jun			
Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	Act		
				20		20		20					
				200		200		200					
CapEx Month Total				0	0	0	0	0	0				
OpEx Month Total				220	0	220	0	220	0				
<b>Month Total</b>				220	0	220	0	220	0				
CapEx Quarter Total						Plan: 0 Actual: 0		Plan: 0 Actual:					
OpEx Quarter Total						220 0		440					
<b>Quarter Total</b>						220 0		440					

\*\*all numbers in the table are in 1000's

## Creating a Financial Benefit

A Financial Benefit is used to track the monetary benefit (such as savings and revenue) that a Proposal, Project or Asset provides. It can also be used in a manner similar to Budgets for analyzing the benefit of the current Portfolio, as well as making decisions when building scenarios for what-if analyses.

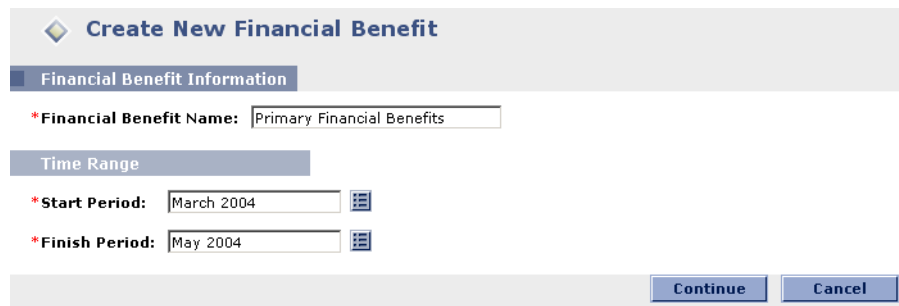
Financial Benefits provide a way to enter planned Benefit values by period, while capturing actual (or realized) benefits alongside. Financial Benefits support categorization by allowing multiple benefit lines to comprise a single Benefit. Each line can be specified as either Savings or Revenue.

Financial Benefits can be created at any time and then linked to a Portfolio Management entity through the Financial Benefit field, or created directly from the Portfolio Management entity by clicking on the  next to the Financial Benefit field.

### To create a Financial Benefit:

1. Log onto Portfolio Management.
2. From the navigation bar, select **Create > Financial Benefit**.

The Create a New Financial Benefit page opens.





**Create New Financial Benefit**

**Financial Benefit Information**

\* **Financial Benefit Name:**

**Time Range**

\* **Start Period:**  

\* **Finish Period:**  

3. Enter the Financial Benefit Name, Start Period, and Finish Period.
4. Click **Continue**.

The Create a New Financial Benefit: Enter Details page opens.

5. (optional) Enter any desired information in the Financial Benefit Information section.
6. Add lines to the Financial Benefit:
  - a. Scroll down to the Financial Benefit Breakdown section.
  - b. Enter the number of lines you wish to add to the Financial Benefit.
  - c. Click **Add**.

The Add Lines to Financial Benefit page opens.

- d. Specify a Type and Category for each Financial Benefit line.
- e. Click **Add**.

The Create a New Financial Benefit: Enter Details page opens again, with the new Financial Benefit lines added.

7. Enter amounts for each Financial Benefit line and period and click **Save**.
8. (optional) If you wish to track actual amounts for your Financial Benefit alongside the planned amounts, click the Planned and Actuals option in the Show line and click **Refresh**.

The Create a New Financial Benefit: Enter Details page will reload with Act fields allowing you to fill in actual values next to the planned amounts in the Financial Benefit columns.

Financial Benefit Breakdown

Financial Benefit Status: New      Show:  Plan Only    Plan and Actuals  
 Enter Lines In:  Months    Quarters      Apply

Total Planned Benefit: \$960,000  
 Total Actual Benefit: \$0

Financial Benefit Breakdown from March 2004 to May 2004													
Q1 2004						Q2 2004							
Jan		Feb		Mar		Apr		May		Jun			
Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	Act		
				20		20		20					
				300		300		300					
Month Total				320	0	320	0	320	0				
Quarter Total						Plan: 320	Actual: 0	Plan: 640 Actua					

\*\*\*all numbers in the table are in 1000's

## Creating Business Objectives

Business Objectives provide a means to capture your business goals as discrete entities that can be prioritized and tied to Portfolio Management entities. Business Objectives can be created, modified, and deleted independently of Portfolio Management entities, though Business Objectives that have already been linked to them cannot be deleted.

### To create a Business Objective:

1. From the navigation bar, select **Portfolio Management > Business Objectives > Create a Business Objective**.

The New Business Objective page opens.




2. Fill in all required fields and any optional fields.
3. Click **Done**.

The Business Objective has been created.

The Business Objective field in a Portfolio Management entity links the entity to that Business Objective.

## Creating Staffing Profiles

Staffing Profiles enable a user to track the forecast demand of Resources, arranged by Skill. Each line in a Staffing Profile tracks a Skill, and optionally a Resource who possesses that Skill.

Staffing Profiles can be created at any time and then linked to a Portfolio Management entity through the Staffing Profile field, or created directly from the Portfolio Management entity by clicking on the  next to the Staffing Profile field.

### To create a Staffing Profile:

1. Log onto Portfolio Management.
2. Select **Create > Staffing Profile** or **Resource > Staffing Profiles > Create a Staffing Profile** from the navigation bar.

The first Create a New Staffing Profile page opens.

**Create New Staffing Profile**

**Staffing Profile Information**

\*Staffing Profile Name:

**Time Range**

\*Start Period:

\*Finish Period:

3. Fill in the Staffing Profile Name and define a Start and Finish Period for the Staffing Profile before clicking **Continue**.

The next Create a New Staffing Profile page opens.

**Create New Staffing Profile: Enter Details**

**Staffing Profile Information**

Profile Status:  Active:  Yes  No

\*Name:  Workload Category:

Created On: February 18, 2004 Created By: John Smith

Description:

This Staffing Profile is for:  New lines on this Staffing Profile draw Resources from Resource Pool:

Start Period: March 2004 Finish Period: May 2004

**Staffing Profile Breakdown**

Profile Status: New  Staffing Profile Lines appear as assignments in capacity visualizations

Skill	Resource	Q1 2004			Q2 2004		
		Jan	Feb	Mar	Apr	May	Jun
					0.0	0.0	0.0
<b>Total FTE's for Month</b>				0.0	0.0	0.0	
<b>Average FTE's for Quarter</b>				0.0		0.0	

Show:  Plan Only  Plan and Actuals  
 Enter Lines In:  Months  Quarters

**Notes**

Notes to be added on save:

4. Fill in any desired fields in the Staffing Profile Information section.
5. Add lines to the Staffing Profile Breakdown.

- a. Specify a number in the Add Lines field and click **Add**. The Add Lines to Staffing Profile page opens.

**Add Lines to Staffing Profile: Unit D - Spring Allocations**

**Line Information**

Name: Unit D - Spring Allocations Status: New

New lines on this Staffing Profile draw Resources from Resource Pool:

Filter Resources by Skill:  Yes  No

\*Skill:   Resource:

Resource Pool:

Comments:

- b. Specify a Skill for the Staffing Profile line.
- c. (optional) Select a Resource for the Staffing Profile line.

Only Resources with the selected Skill will appear in the auto-complete list unless you select **No** in the Filter Resources by Skill option.

- d. Click **Add**.

The Create a New Staffing Profile page reloads with the Staffing Profile lines added.

- e. Repeat as necessary.

You can add more than one line to the Staffing Profile at a time by entering the number of desired lines into the Add Lines field and clicking **Add**.

6. Specify Full-Time Equivalent values for each Staffing Profile line.

**Staffing Profile Breakdown**

**Profile Status:** New  Staffing Profile Lines appear as assignments in capacity visualizations

**Add Staffing Profile Lines:**

Skill	Resource
<input type="checkbox"/> DBA	John Smith
<input type="checkbox"/> Technical Writer	Jana Smith

**Total FTE's for Month**

**Average FTE's for Quarter**

Q1 2004			Q2 2004		
Jan	Feb	Mar	Apr	May	Jun
		0.0	0.0	0.0	
		0.0	0.0		

**Show:**  Plan Only  Plan and Actuals  
**Enter Lines In:**  Months  Quarters

You can choose to track actual values alongside the planned values in each Staffing Profile line, for comparison purposes. Select the Show Plan and Actuals radio button and click **Refresh** to track actual values.

**Staffing Profile Breakdown**

**Profile Status:** New  Staffing Profile Lines appear as assignments in capacity visualizations

**Add Staffing Profile Lines:**

Skill	Resource
<input type="checkbox"/> DBA	John Smith
<input type="checkbox"/> Technical Writer	Jana Smith

**Total FTE's for Month**

**Average FTE's for Quarter**

Q1 2004				Q2 2004					
Feb		Mar		Apr		May		Jun	
Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	Act
		1		1		1			
		1		1		1			
		2	0.0	2	0.0	2	0.0		
		(Plan) 2 (Act) 0.0				(Plan) 2 (Act) 0.0			

**Show:**  Plan Only  Plan and Actuals  
**Enter Lines In:**  Months  Quarters

7. Click **Create**.

The Staffing Profile is created and the View Staffing Profile page opens.

**View Staffing Profile: Unit D - Spring Allocations**

View Staffing Profile | **Modify Staffing Profile** | Configure Access

---

**Staffing Profile Information** Done

**Profile Status:** New **Active:** Yes  
**Name:** Unit D - Spring Allocations **Workload Category:**  
**Created On:** January 9, 2004 **Created By:** John Smith  
**Description:**

---

**This Staffing Profile is for:** Organization Unit - [Database Arch](#)  
**Resources are drawn from:** Resource Pool - [IT Unit D](#)

---

**Start Period:** February 2004 **Finish Period:** April 2004

---

**Staffing Profile Breakdown**

**Profile Status:** New Staffing Profile Lines appear as assignments in capacity visualizations

Skill	Resource	Q1 2004			Q2 2004		
		Jan	Feb	Mar	Apr	May	Jun
		DBA		1.0	1.0	1.0	
Technical Writer		1.0	1.0	1.0			
<b>Total FTE's for Month</b>			<b>2.0</b>	<b>2.0</b>	<b>2.0</b>		
<b>Average FTE's for Quarter</b>				<b>2.0</b>		<b>2.0</b>	

**Show:**  Plan Only  Plan and Actuals  
**View Lines In:**  Months  Quarters Apply

---

**Notes** Done



## Chapter

# 4

## Viewing Your Portfolio

This chapter explains how to use Portfolio Management visualizations to view and analyze various aspects of your Portfolio.

The following topics are covered:

- *Analyzing Your Portfolio*
- *Determining Portfolio Scores*
- *Using Portfolio Management Portlets*

### Analyzing Your Portfolio

View your current portfolio at any time by selecting **Portfolio Management > View Current Portfolio Map** from the navigation bar. The Analyze Current Portfolio page opens, displaying a configurable bubble chart representing the Projects and Assets currently active. *Table 4-1* describes the filter fields you can use to alter the bubble chart's content and appearance.



Figure 4-1 Analyze Current Portfolio page



Table 4-1. Analyze Current Portfolio Page - Filter Fields

Field	Description
Include the following projects in graph	Selects the Projects to show in the bubble chart. Includes a multi-select auto-complete field.
Include the following assets in graph	Selects the Assets to show in the bubble chart. Includes a multi-select auto-complete field.
Business Unit	Filters the bubble chart by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the bubble chart by Business Objective. A multi-select auto-complete field.
Project Class	Filters the bubble chart by Project Class. A multi-select auto-complete field.
Asset Class	Filters the bubble chart by Asset Class. A multi-select auto-complete field.
Value greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain Value range.
Risk greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain Risk range.
Score greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain qualitative Score range.
Budget total greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain Budget range.
Benefit total greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain Financial Benefit range.
Resource total (person months) greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain resource total by person month range.
Return on Investment greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain ROI range.
Net Present Value greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain NPV range.
Custom Value greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain custom value range.
Horizontal Axis	Specifies the scalar for the bubble chart's horizontal axis.

*Table 4-1. Analyze Current Portfolio Page - Filter Fields*

<b>Field</b>	<b>Description</b>
Vertical Axis	Specifies the scalar for the bubble chart's vertical axis.
Color of bubble indicates	Chooses what the color of the bubbles indicates.
Size of bubble indicates	Chooses what the size of the bubbles indicates.

## Common Portfolio Analyses

The Analyze Current Portfolio page provides an easy and powerful tool for viewing your Portfolio in different ways. Depending on how the filter fields are configured, certain aspects of the Portfolio can be highlighted or hidden.

The following sections discuss filter field configurations that can be used to view your Portfolio, depending on what you want to see:

- [Default Filter Field Settings](#)
- [Slicing by Category](#)

### *Default Filter Field Settings*

The Analyze Current Portfolio page's filter fields are defaulted to display all active Projects and Assets in the Portfolio with no restrictions. [Table 4-2](#) lists the default values for the display control fields at the bottom.

*Table 4-2. Default Display Settings for Analyze Current Portfolio Page*

<b>Field</b>	<b>Value</b>
Horizontal Axis	Value
Vertical Axis	Risk
Color of bubble indicates	Business Objective
Size of bubble indicates	Budget

With these default settings in place, you can easily view all currently active Projects and Assets and quickly gauge their position relative to their Value and Risk ratings. By selecting a Business Unit, you can quickly view the Portfolio of a particular Business Unit using these criteria.

## Slicing by Category

By keeping the Analyze Current Portfolio page's *Default Filter Field Settings* and playing with the Color of bubble indicates field, you can view your current Portfolio according to risk/reward (Risk/Value ratings), striped by any one of the following categories:

- Business Objective
- Asset Class
- Business Unit
- Health
- Project Class
- Type

## Determining Portfolio Scores

Proposals, Projects, and Assets can be evaluated using qualitative criteria that cannot be calculated purely numerically. These rankings are captured using a set of fields on each Portfolio Management entity, as illustrated in *Figure 4-2*.

The screenshot displays two sections of qualitative scoring fields. The first section, titled 'Value Ratings', includes six dropdown menus: Internal Rate of Return (6 - 9.99%), Strategic Match (No impacted goal. Increases operational efficiency.), Competitive Advantage (Improves operating efficiencies that affect competitive position.), Competitive Response (Can be postponed for 12 months with significant effect to competitive positionin), and Productivity (Less than 10% increase.). The second section, titled 'Risk Ratings', includes five dropdown menus: Organization Risk (Low risk.), Technical Risk (Very low uncertainty.), Architecture Risk (Minor change to standard architecture.), Definition Risk (Requirements are moderately firm. Low probability of changes.), and Infrastructure Risk (Small changes and additions are expected.).

Figure 4-2 Qualitative Scoring Fields

When filled out, these fields are translated automatically into a numeric qualitative score for that Proposal, Project, or Request.

**Business Case Details**

<b>Budget:</b> <a href="#">Spring Sales Budget</a>	<b>Financial Benefit:</b> <a href="#">Internal Financial Benefit</a>	<b>Staffing Profile:</b> <a href="#">Unit 9 Companions</a>
<b>Return on Investment:</b>	<b>Value Rating:</b> 36	<b>Risk Rating:</b> 10
<b>Score Adjustment:</b> <input type="text" value="3"/>	<b>Total Score:</b> 29	
<b>Business Case Doc:</b> <input type="text"/> <a href="#">Browse...</a>		
<b>Requirements Doc:</b> <input type="text"/> <a href="#">Browse...</a>		

**Value Ratings**

**Internal Rate of Return:** 6 - 9.99%

**Strategic Match:** No impacted goal. Increases operational efficiency.

**Competitive Advantage:** Improves operating efficiencies that affect competitive position.

**Competitive Response:** Can be postponed for 12 months with significant effect to competitive position in

**Productivity:** Less than 10% increase.

**Risk Ratings**

**Organization Risk:** Low risk.

**Technical Risk:** Very low uncertainty.

**Architecture Risk:** Minor change to standard architecture.

**Definition Risk:** Requirements are moderately firm. Low probability of changes.

**Infrastructure Risk:** Small changes and additions are expected.

The Proposal, Project, or Asset Total Score can be adjusted manually using the Score Adjustment field.

<b>Score Adjustment:</b> <input type="text" value="3"/>	<b>Total Score:</b> 29
<b>Score Adjustment:</b> <input type="text"/>	<b>Total Score:</b> 26



A Project sponsor might input **40** into the Score Adjustment field, raising the total score by 40 points.

Someone who thinks the Project is riskier than the calculations indicate might input **-30**, lowering the score by 30 points.

## Using Portfolio Management Portlets

Portfolio Management provides several Portlets for use in viewing key aspects of your Portfolio in real time. These Portlets can be personalized to show the most useful information for a particular user.

The following sections describe cases where particular Portlets can be most helpful in viewing Portfolio information:

- *Viewing the Portfolio with the Current Portfolio Map Portlet*
- *Viewing Portfolio Financial Data with the Portfolio by Category Portlet*
- *Viewing Resource Demand with the Resource by Category Portlet*



Note

For detailed descriptions of each Portlet including filter fields, see *“Portfolio Management and the Mercury ITG Dashboard”* on page 77.

### Viewing the Portfolio with the Current Portfolio Map Portlet

The Current Portfolio Map Portlet provides the same bubble chart as the Analyze Current Portfolio page.

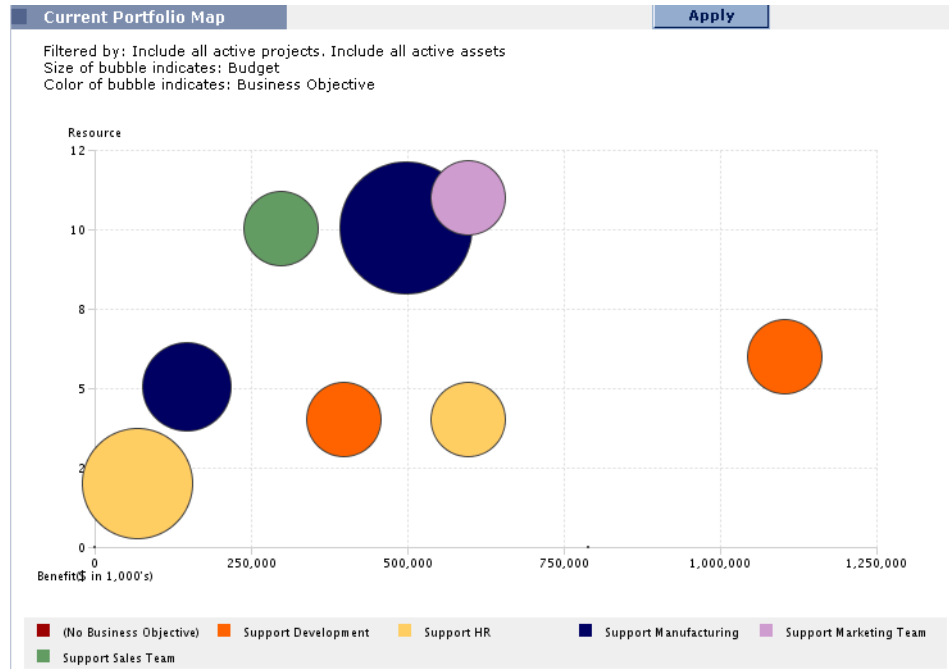


Figure 4-3 Current Portfolio Map Portlet

Multiple instances of this Portlet can be placed on a single Dashboard page with different filter field settings. This can provide simultaneous views of different aspects of the current Portfolio.

## Viewing Portfolio Financial Data with the 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.

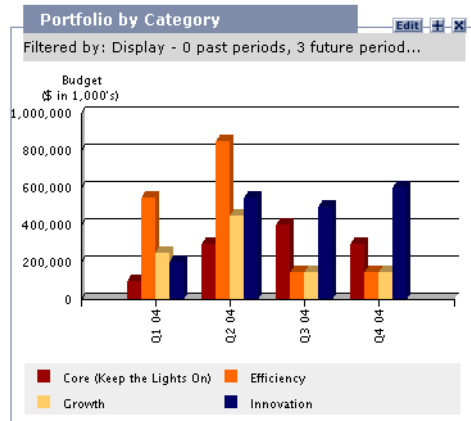


Figure 4-4 Portfolio by Category Portlet

You can choose to group these values by Project Class, Asset Class, or Business Objective, which will display a comparison of the selected value within the chosen category per period.

Clicking on a bar in the chart takes you to a drilldown page detailing the Budget by period for each entity that makes up the bar.

**Portfolio by Category**  
Project Class: Efficiency

Budget Details by Period Done

**Total Budget:** \$1,700,000,000  
\*\*all numbers in the table are in 1000's

Proposals					
Name	Q1 04	Q2 04	Q3 04	Q4 04	Total
Gandalf v1.2 Upgrade	\$100,000	\$200,000	\$0	\$0	\$300,000
<b>Total</b>	\$100,000	\$200,000	\$0	\$0	

Projects					
Name	Q1 04	Q2 04	Q3 04	Q4 04	Total
MFG Rollout Enhancement	\$400,000	\$500,000	\$0	\$0	\$900,000
One Ring Enhancement Project	\$50,000	\$150,000	\$150,000	\$150,000	\$500,000
<b>Total</b>	\$450,000	\$650,000	\$150,000	\$150,000	

Done

Figure 4-5 Portfolio by Category Portlet Drilldown Page

## Viewing Resource Demand with the Resource by Category Portlet

This graphical Portlet allows users to perform a by-period comparison of resource requirements and availability in the Portfolio.

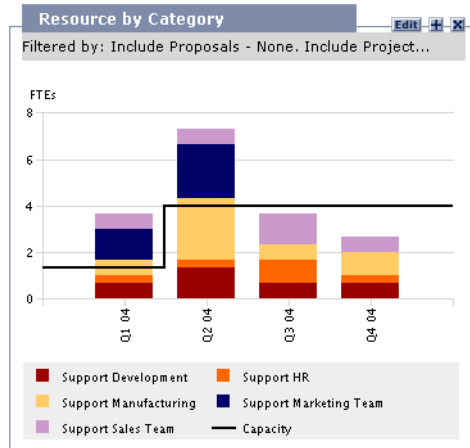


Figure 4-6 Resource by Category Portlet

Resource requirements are drawn from the Staffing Profiles attached to the Proposals, Projects, and Assets being examined in the Portlet, while the capacity are calculated based on Resource Pools specified in the filter page.

Clicking on a section of a bar takes you to a drilldown page showing a breakdown of the assignments in each entity making up that section, as well as the capacity of the selected Resource Pool(s).

**Resource by Category Breakdown Table**  
Business Objective: Support Manufacturing

Resource Details by Period in FTE Done

Capacity

Resource Pool Name	Q1 04	Q2 04	Q3 04	Q4 04
<a href="#">Aragorn Ranger Unit A</a>	1.33	4	4	4
<b>Totals</b>	1.33	4	4	4

Workload

Projects

Staffing Profile Name	Q1 04	Q2 04	Q3 04	Q4 04
<a href="#">Gimli Unit C</a>	0.67	2.67	0	0
<a href="#">Legolas Unit E</a>	0	0	0.67	1
<b>Totals</b>	0.67	2.67	0.67	1

Done

Figure 4-7 Resource by Category Portlet Drilldown Page



# Chapter 5 What-If Analysis

This chapter explains how to use Scenario Comparisons to perform what-if analysis. What-if analysis is a way to determine the consequences of Portfolio-related decisions without having to actually make purchases and initiate projects. Mercury Portfolio Management allows you to rapidly assemble Scenario Comparisons that examine and compare potential Portfolio scenarios to perform what-if analysis using a number of different visualizations.

The following topics are covered:

- *Creating a Scenario Comparison*
- *Using Scenario Comparisons*
- *Managing Scenario Comparisons*
- *Using Scenario Comparison Portlets*

## Creating a Scenario Comparison

**To create a Scenario Comparison:**

1. Log onto Portfolio Management.
2. From the navigation bar, select **Portfolio Management > Scenario Comparisons > Create a Scenario Comparison**.


The Create Scenario Comparison page opens.


### Create Scenario Comparison

**Comparison Information**

\*Comparison Name:

**Enter Time Range**

\*Start Period:  

\*Finish Period:  

**Enter Scenario Names**


Please enter the names of the three scenarios in this scenario comparison. You will be able to change these names later.

\*Scenario 1:

\*Scenario 2:

\*Scenario 3:

**Specify Content**

Business Unit:  

Please select whether you would like to have the projects and assets in your current portfolio as well as submitted proposals as a starting point for this scenario comparison. Regardless of your choice, you will be able to add and remove individual proposals, projects, and assets later.

Include all projects and assets from the current portfolio

Include submitted proposals

3. Enter a Comparison Name.

4. Enter a Time Range.

This will determine the time range for all visualizations in the Scenario Comparison. The Start and Finish Periods can be changed at any time.

5. Enter names for each scenario.

Scenario Comparisons always contain three scenarios.

6. Specify the content for the Scenario Comparison.

This determines the set of Proposals, Projects, and Assets that will be compared in all three scenarios. You can quickly create a set that resembles your current Portfolio as a starting point by selecting the checkboxes provided. Scenario Comparison contents can be modified later.

7. Click **Create**.

The Scenario Comparison is created and the Scenario Comparison page opens.

**Scenario Comparison: Phase One Comparison**

**Comparison Information** Save

\* **Comparison Name:** Phase One Comparison **Created By:** John Smith **Last Updated By:** John Smith  
**Active:**  Yes  No Configure Access **Last Updated On:** February 18, 2004  
**Description:** Phase One Comparison

Calculate **Total Budget** for comparison from the following Budgets: Start Period: April 2004  
 Calculate **Total Available Resources** for comparison from the following Resource Pools: Finish Period: December 2004

**Overview** **Budget Summary** **Cost Benefit** **Budget By Asset Class** **Budget By Project Class** **Budget By Business Objective**

**Graph Period Interval:** Quarter Change

**Cost Plan**

**Resource Plan**

**Scenario Content**

Scenario Names: 1 - Scenario 1; 2 - Scenario 2; 3 - Scenario 3 Change Scenario Names

Name	Phase	Business Unit	Total Cost	Total Benefit	Total Resources (person months)	ROI	NPV	Custom Value	Score	Scenario		
										1	2	3
<input checked="" type="checkbox"/> Additional IT Storage Space	Project	Wholesale BU	\$500,000,000	\$600,000,000	4	\$100,000,000	\$94,350,118	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Disaster Recovery Project	Project	Corporate	\$750,000,000	\$70,000,000	2	(\$680,000,000)	(\$663,211,598)	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Expense Development Initiative	Project	Consumer BU	\$500,000,000	\$400,000,000	4	(\$100,000,000)	(\$93,621,658)	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Gandalf v1.2 Upgrade	Proposal	Corporate	\$300,000,000	(\$794,967,296)	9	(\$1,094,967,296)	\$2,970,812,599	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Growth Inside Sales Team	Project	Corporate	\$500,000,000	\$300,000,000	10	(\$200,000,000)	(\$181,248,020)	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Hard Drive Maintenance Project	Project	Corporate	\$600,000,000	\$150,000,000	5	(\$450,000,000)	(\$419,392,901)	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> IP Backbone Enhancement	Project	Consumer BU	\$500,000,000	\$1,105,032,704	6	\$605,032,704	\$4,778,815,019	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> MFG Rollout Enhancement	Project	Wholesale BU	\$900,000,000	\$500,000,000	10	(\$400,000,000)	(\$389,364,973)	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> One Ring Enhancement Project	Project	Corporate	\$500,000,000	\$600,000,000	11	\$100,000,000	\$111,381,983	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Add Content By Phase:** Proposal Add View Content List Save

**Notes**

Notes to be added on save:

Save Copy Cancel

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## Using Scenario Comparisons

Scenario Comparisons are the means for maintaining and analyzing groups of scenarios. A Scenario Comparison contains three scenarios that are built from

an easily-maintainable set of Proposals, Projects, and Assets. These scenarios can then be examined and compared with each other using a number of different visualizations.

The following areas of the Scenario Comparison are discussed:

- [Overview](#)
- [Budget Summary](#)
- [Cost Benefit](#)
- [Budget by Asset Class](#)
- [Budget by Project Class](#)
- [Budget by Business Objectives](#)

## Overview

The **Overview** tab in the Scenario Comparison page provides an overview of the three scenarios in the Scenario Comparison.

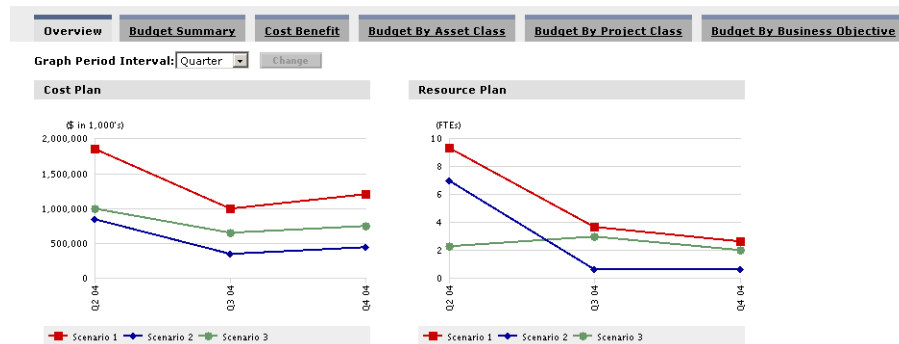


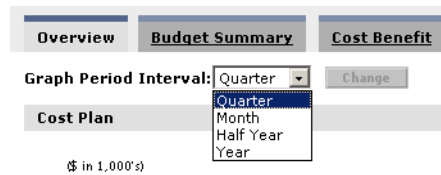
Figure 5-1 Scenario Comparison Page - Overview Tab

Unlike the other tabs, the **Overview** tab integrates all three scenarios into each of the following visualizations:

- **Cost Plan**  
The Cost Plan graph shows the total Budget each scenario will consume per period, as well as the total Budget available, if specified. For details on how to specify a total available Budget for a Scenario Comparison, see [“Changing Scenario Comparison Details”](#) on page 58.
- **Resource Plan**  
The Resource Plan graph displays the total Resource demand of each

scenario per period, along with the total available Resources, if specified. For details on how to specify total available Resources for a Scenario Comparison, see *“Changing Scenario Comparison Details”* on page 58.

To change the time scale used in the graphs, select a new value from the Graph Period Interval drop down list and click **Change**.



## Budget Summary

The **Budget Summary** tab in the Scenario Comparison page provides a graph of the Budget information for each scenario.

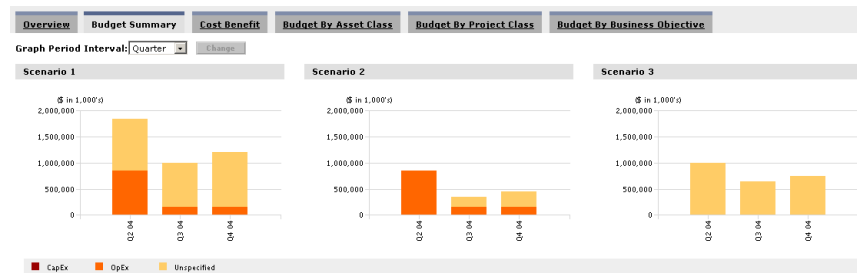


Figure 5-2 Scenario Comparison Page - Budget Summary Tab

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. For details on how to specify a total available Budget for a Scenario Comparison, see *“Changing Scenario Comparison Details”* on page 58.

## Cost Benefit

The **Cost Benefit** tab in the Scenario Comparison page provides a graph illustrating the cost/benefit analysis for each scenario.

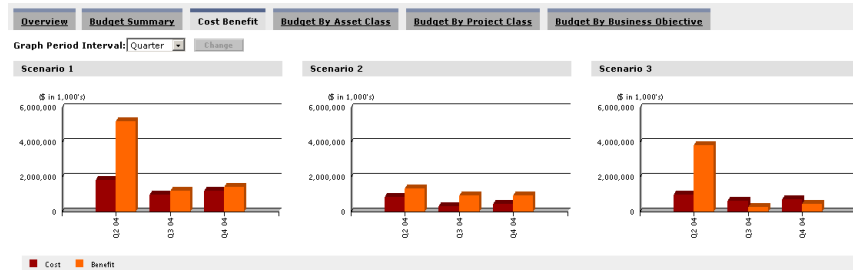


Figure 5-3 Scenario Comparison Page - Cost Benefit Tab

The graph for each scenario is a bar chart depicting the expected cost per period, as well as the expected benefit. This graph serves the following functions:

- The cost and benefit bars in each graph give information regarding the net benefit by period for each scenario.
- Since the graph is laid out by period, it also portrays the cost and benefit trends for each scenario.

## Budget by Asset Class

The **Budget by Asset Class** tab in the Scenario Comparison page provides a graph comparing the Budget per period for each scenario by Asset Class.

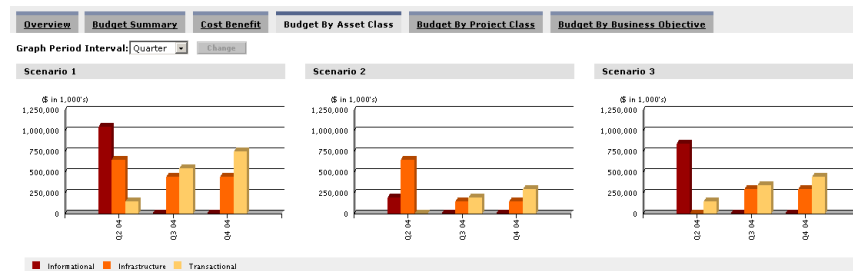


Figure 5-4 Scenario Comparison Page - Budget by Asset Class Tab

The graph for each scenario consists of a bar chart with adjacent bars (one for each Asset Class) in each period. These allow you to compare the Budget distribution within a category for each scenario. For example, in the **Budget by Asset Class** graphs, it is possible to visualize how much budget is being spent on Infrastructure initiatives compared to how much budget is being spent on Transactional initiatives.

## Budget by Project Class

The **Budget by Project Class** tab in the Scenario Comparison page provides a graph comparing the Budget per period for each scenario by Project Class.

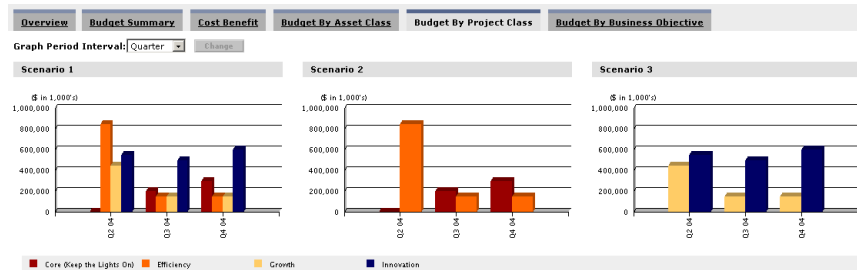


Figure 5-5 Scenario Comparison Page - Budget by Project Class Tab

The graph for each scenario consists of a bar chart with adjacent bars (one for each Project Class) in each period. These allow you to compare the Budget distribution within a category for each scenario. For example, in the **Budget by Project Class** graphs, it is possible to visualize how much budget is being spent on Efficiency initiatives compared to how much budget is being spent on Growth initiatives.

## Budget by Business Objectives

The **Budget by Business Objectives** tab in the Scenario Comparison page provides a graph comparing the Budget per period for each scenario by Business Objective.

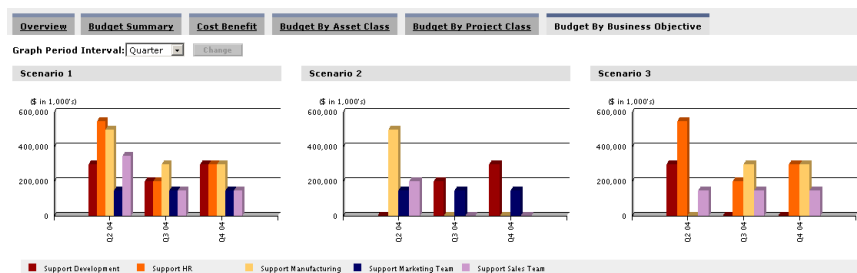


Figure 5-6 Scenario Comparison Page - Budget by Business Objective Tab

The graph for each scenario consists of a bar chart with adjacent bars (one for each Business Objective) in each period. These allow you to compare the Budget distribution under a particular Business Objective for each scenario.

## Managing Scenario Comparisons

Scenario Comparisons can be changed in a number of different ways:

- Scenario Comparison information can be updated.
- Scenario content can be altered.
- Scenario Comparisons can be deleted or copied.
- Certain users can be prevented from editing or even viewing Scenario Comparisons.

The following sections discuss manipulating Scenario Comparisons in more detail:

- [Changing Scenario Comparison Details](#)
- [Adjusting Scenario Comparison Contents](#)
- [Maintaining Scenario Comparisons](#)
- [Setting Scenario Comparison Security](#)

### Changing Scenario Comparison Details

The **Comparison Information** section of the Scenario Comparison page contains information relating to the Scenario Comparison as a whole. The Comparison Information fields are described in [Table 5-1](#).

To change Scenario Comparison details or add notes, make the desired changes in the appropriate field(s) and click **Save**.

The screenshot shows a web form titled "Comparison Information" with a "Save" button. The form contains the following fields and controls:

- Comparison Name:** A text input field containing "Phase One Comparison".
- Created By:** A text field containing "John Smith".
- Last Updated By:** A text field containing "John Smith".
- Active:** Radio buttons for "Yes" (selected) and "No".
- Configure Access:** A button.
- Last Updated On:** A text field containing "February 18, 2004".
- Description:** A text input field containing "Phase One Comparison".
- Calculate Total Budget for comparison from the following Budgets:** A text input field with a list icon.
- Calculate Total Available Resources for comparison from the following Resource Pools:** A text input field with a list icon.
- \* Start Period:** A date picker field set to "April 2004".
- \* Finish Period:** A date picker field set to "December 2004".

Figure 5-7 Scenario Comparison page - Comparison Information section

Table 5-1. Scenario Comparison Information Fields

Field	Description
Comparison Name	The name of the Scenario Comparison.



Table 5-1. Scenario Comparison Information Fields

Field	Description
Active	Indicates whether the Scenario Comparison is active.
Description	The description for the Scenario Comparison.
Created By	The user who created the Scenario Comparison.
<b>Configure Access</b>	Opens the Configure Access for Scenario Comparison page. See <a href="#">“Setting Scenario Comparison Security”</a> on page 65 for more details.
Last Updated By	The user who last updated the Scenario Comparison.
Last Updated On	The date the Scenario Comparison was last updated.
Calculate Total Budget ...	Calculates a total Budget for the entire Scenario Comparison based on the Budgets selected.
Calculate Total Available Resources ...	Calculates total Resource availability for the entire Scenario Comparison based on the Resource Pools selected.
Start Period	The start period for the Scenario Comparison.
End Period	The end period for the Scenario Comparison.

Notes for the Scenario Comparison can be added in the **Notes** section at the bottom of the Scenario Comparison page.

The screenshot shows a user interface element for adding notes. At the top, there is a blue header bar with the word "Notes" in white. Below this, the text "Notes to be added on save:" is displayed. Underneath the text is a large, empty rectangular text input field with a vertical scrollbar on the right side.

## Adjusting Scenario Comparison Contents

The **Scenario Contents** section of the Scenario Comparison page contains and controls the contents of the Scenario Comparison.

Click to change names of each scenario

Scenario Content											Scenario Names: 1 - Scenario 1; 2 - Scenario 2; 3 - Scenario 3			Change Scenario Names
Name	Phase	Business Unit	Total Cost	Total Benefit	Total Resources (person months)	RDI	NPV	Custom Value	Score	Scenario	1	2	3	
Additional IT Storage Space	Project	Wholesale BU	\$500,000,000	\$600,000,000	4	\$100,000,000	\$94,350,118	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Disaster Recovery Project	Project	Corporate	\$750,000,000	\$70,000,000	2	(\$680,000,000)	(\$663,211,598)	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Expense Development Initiative	Project	Consumer BU	\$500,000,000	\$400,000,000	4	(\$100,000,000)	(\$93,621,658)	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Gandalf v1.2 Upgrade	Proposal	Corporate	\$300,000,000	(\$794,967,296)	9	(\$1,094,967,296)	\$2,970,812,599	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Growth Inside Sales Team	Project	Corporate	\$500,000,000	\$300,000,000	10	(\$200,000,000)	(\$181,248,020)	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Hard Drive Maintenance Project	Project	Corporate	\$600,000,000	\$150,000,000	5	(\$450,000,000)	(\$419,392,901)	0	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
IE Backbone Enhancement	Project	Consumer BU	\$500,000,000	\$1,105,032,704	6	\$605,032,704	\$4,778,815,019	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
MFG Rollout Enhancement	Project	Wholesale BU	\$900,000,000	\$500,000,000	10	(\$400,000,000)	(\$389,364,973)	0	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
One Ring Enhancement Project	Project	Corporate	\$500,000,000	\$600,000,000	11	\$100,000,000	\$111,381,983	0	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Add Content By Phase: Proposal Add View Content List

Save

Click to view entire list of Comparison contents

Click to add content

Choose new type of content to add

Save changes to content list and refresh page

Select the entities that count in each scenario

Scenario Comparison contents can be modified in the following ways:

- Adding a Project, Proposal, or Asset to a Scenario
- Adding Projects, Proposals, or Assets to the Scenario Contents List
- Changing Scenario Names

### Adding a Project, Proposal, or Asset to a Scenario

The **Scenario Contents** section lists all of the Proposals, Projects, and Assets being considered in the Scenario Comparison. The contents of each individual scenario in the Scenario Comparison are controlled using the checkboxes under the scenario numbers (1, 2, or 3).

Disaster Recovery Project	Project	Corporate	\$750,000,000	\$70,000,000	2	(\$680,000,000)	(\$663,211,598)	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Expense Development Initiative	Project	Consumer BU	\$500,000,000	\$400,000,000	4	(\$100,000,000)	(\$93,621,658)	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gandalf v1.2 Upgrade	Proposal	Corporate	\$300,000,000	(\$794,967,296)	9	(\$1,094,967,296)	\$2,970,812,599	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 5-8 Scenario Contents Checkboxes

**To change the contents of a scenario:**

1. Open the Scenario Comparison you wish to make changes to.

For details on finding Scenario Comparisons, see *“Maintaining Scenario Comparisons”* on page 62.

2. Scroll down to the **Scenario Contents** section.
3. Select the checkbox or boxes under a scenario that corresponds to a Proposal, Project, or Asset that should be added.

You can also de-select checkboxes corresponding to Proposals, Projects, or Assets that should no longer be included in a scenario.

4. Click **Save**.

The Scenario Comparison contents are updated.

*Adding Projects, Proposals, or Assets to the Scenario Contents List*

The **Scenario Contents** section lists all of the Proposals, Projects, and Assets currently being used in the Scenario Comparison. You can add other Proposals, Projects, or Assets as you see fit.

**To add a Project, Portfolio, or Asset to the Scenario Contents section:**

1. Open the Scenario Comparison you wish to make changes to.

For details on finding Scenario Comparisons, see *“Maintaining Scenario Comparisons”* on page 62.

2. Scroll down to the **Scenario Contents** section.
3. Select the type of Portfolio Management entity (Project, Proposal, or Asset) you wish to add from the Add Content by Phase drop down list.
4. Click **Add**.

A window opens, displaying a list of Portfolio Management entities you can add.

5. Select the Portfolio Management entities you wish to add and click **OK**.

The entities are added to the **Scenario Contents** section.

You can also remove Portfolio Management entities from the **Scenario Contents** section by clicking the  button next to their names.

## Changing Scenario Names

The names of individual scenarios in a Scenario Comparison can be changed.

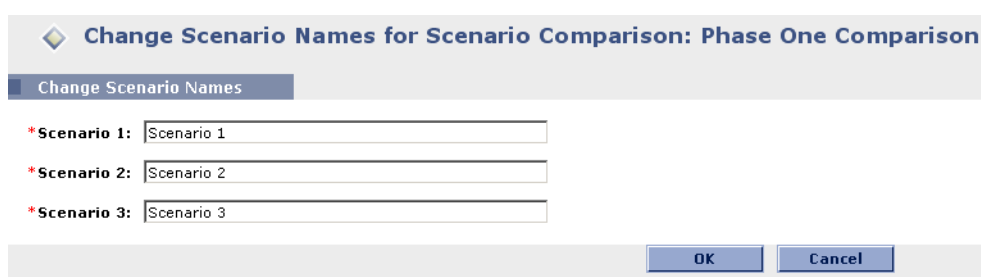
### To change the names of scenarios in a Scenario Comparison:

1. Open the Scenario Comparison you wish to make changes to.

For details on finding Scenario Comparisons, see *“Maintaining Scenario Comparisons”* on page 62.

2. Scroll down to the **Scenario Contents** section.
3. Click **Change Scenario Names**.

The Change Scenario Names page opens.



◆ **Change Scenario Names for Scenario Comparison: Phase One Comparison**

Change Scenario Names

\* Scenario 1:

\* Scenario 2:

\* Scenario 3:

OK Cancel

4. Enter the new names for the scenarios.
5. Click **OK**.
6. Click **Save**.

The Scenario Comparison page opens with the new scenario names.

## Maintaining Scenario Comparisons

All Scenario Comparisons can be located from the Scenario Comparison List page, accessed by selecting **Portfolio Management > Scenario Comparisons > List Scenario Comparisons** from the navigation bar.

Scenario Comparison List					
Showing 1 to 3 of 3					
Comparison Name	Description	Created By	Created On	Last Updated By	Last Updated On
<a href="#">Phase One Comparison</a>	Phase One Comparison	John Smith	February 18, 2004	John Smith	February 18, 2004
<a href="#">Phase Three Comparison</a>	Phase One Comparison	John Smith	February 19, 2004	John Smith	February 19, 2004
<a href="#">Phase Two Scenario Comparison</a>		John Smith	February 18, 2004	John Smith	February 18, 2004

Showing 1 to 3 of 3

Created By:

Show Only Comparisons Updated In The Last:

Show Only Active Comparisons:  Yes  No

Figure 5-9 Scenario Comparison List Page

The list of Scenario Comparisons can be filtered using the parameters described in [Table 5-2](#).

Table 5-2. Scenario Comparison List Page - Filter Fields

Field	Description
Created By	Displays only Scenario Comparisons created by a particular user.
Show Only Comparisons Updated in the Last	Displays only Scenario Comparisons updated within the period selected from the drop down list.
Show Only Active Comparisons	Displays only active Scenario Comparisons.
Sort By	Selects a Scenario Comparison attribute to sort the list of results by, and chooses whether the list will be in ascending or descending order.
<b>Apply</b>	Reloads the Scenario Comparison List page with the filters applied.

Scenario Comparisons can be deleted or copied. The following sections discuss these activities in more detail:

- [Deleting a Scenario Comparison](#)
- [Copying a Scenario Comparison](#)

### Deleting a Scenario Comparison

Scenario Comparisons can be deleted from the Scenario Comparison List page.

### To delete a Scenario Comparison:

1. Select **Portfolio Management > Scenario Comparisons > List Scenario Comparisons** from the navigation bar.

The Scenario Comparison List page opens.

Comparison Name	Description	Created By	Created On	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> Phase One Comparison	Phase One Comparison	John Smith	February 18, 2004	John Smith	February 18, 2004
<input checked="" type="checkbox"/> Phase Three Comparison	Phase One Comparison	John Smith	February 19, 2004	John Smith	February 19, 2004
<input checked="" type="checkbox"/> Phase Two Scenario Comparison		John Smith	February 18, 2004	John Smith	February 18, 2004

Showing 1 to 3 of 3

Created By:

Show Only Comparisons Updated In The Last:

Show Only Active Comparisons:  Yes  No

2. If necessary, filter the Scenario Comparison List page to display the Scenario Comparison you are looking for.
3. Click the  next to the Scenario Comparison you wish to delete.

A question dialog opens.

4. Click **OK**.

The Scenario Comparison is deleted.

### *Copying a Scenario Comparison*

Scenario Comparisons can be copied from the Scenario Comparison page.

### To copy a Scenario Comparison:

1. Open the Scenario Comparison you wish to copy.
2. Scroll to the bottom of the page and click **Copy**.

A copy of the Scenario Comparison is created named “Copy of <Scenario Comparison Name>.” The Scenario Comparison page for “Copy of <Scenario Comparison Name>” opens.

## Setting Scenario Comparison Security

Access to a Scenario Comparison is controlled primarily through Access Grants set in the Security Group definitions. Additionally, the user who creates a Scenario Comparison can specify a list of users who can view it, edit its basic information, edit its contents, or edit its security. The following sections describe the security surrounding Scenario Comparison in more detail:

- [Scenario Comparison Access Grants](#)
- [Scenario Comparison Configure Access Page](#)
- [Enabling User Access](#)

### Scenario Comparison Access Grants

Users are linked to Access Grants through the Security Group they are a part of. The Access Grants surrounding Scenario Comparisons are discussed in more detail in [Table 5-3](#). Without these Access Grants, a user cannot view or edit a Scenario Comparison regardless of whether they are specified in the list on the Scenario Comparison's Configure Access page. For more information on Access Grants and Security Groups, see "[Portfolio Management Security Groups](#)" on page 75 or *Security Model Guide and Reference*.

Table 5-3. Scenario Comparison Access Grants

Access Grant	Description
View Scenario Comparisons	The user can view any Scenario Comparison for which they are on the specified View or Edit list.
Edit Scenario Comparisons	The user can view, edit and delete any Scenario Comparison for which they are on the specified Edit list, as well as create new Scenario Comparisons.
Manage Scenario Comparisons	The user can view, edit and delete any Scenario Comparisons in the system, as well as create new Scenario Comparisons.

### Scenario Comparison Configure Access Page

The Configure Access page for a Scenario Comparison is used to grant additional editing access to the Scenario Comparison to each user on the list individually. All users listed on the Configure Access page automatically have viewing access at the least.



Without the proper Access Grants, a user cannot view or edit a Scenario Comparison regardless of whether they are specified in the list on the Scenario Comparison's Configure Access page. See *“Scenario Comparison Access Grants”* on page 65 for more detailed information.

*Table 5-4* lists the options in the Configure Access page.

*Table 5-4. Security Options for Scenario Comparison Configure Access Page*

Option	Description
View Access	The user can view the Scenario Comparison but not edit its information. Any user listed has View access.
Edit Basic Information	The user can edit the fields in the Scenario Comparison Information section, but not the Scenario Comparison contents.
Edit Contents	The user can edit the Scenario Comparison contents, but not the fields in the Scenario Comparison Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the Scenario Comparison.
Delete this Comparison	The user can delete the Scenario Comparison.

## Enabling User Access

**To set up a list of users with View or Edit access to a Scenario Comparison:**

1. Open the Scenario Comparison page.

If you have permission to modify the Scenario Comparison, the **Configure Access** button will be enabled.



2. Click **Configure Access**.



The Configure Access for Scenario Comparison page opens.

**Configure Access for Phase One Comparison**

**Configure Access**

The following users have access to view Phase One Comparison. You may provide additional editing access on an individual basis.

View Access			Additional Editing Access			
Username	First Name	Last Name	Edit Basic Information	Edit Contents	Edit Security	Delete this Comparison
<input type="checkbox"/> frodo	John	Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Give Access to Username:

3. Add a user or group of users to the list:
  - a. Select a user or group of users from the Give Access to Username multi-select auto-complete list
  - b. Click **Add**.
4. You can configure each user's access individually by selecting the checkboxes.
 

See [Table 5-4 on page 66](#) for more detailed information on each option.
5. Click **Save**.

## Using Scenario Comparison Portlets

Portfolio Management includes Portlets that can be added to your Mercury ITG Dashboard. As each Portlet is filtered by Scenario Comparison, and in some cases by scenario, it is possible to have Portlets next to each other featuring different scenarios or views into different Scenario Comparisons entirely. [Figure 5-10](#) depicts two Budget by Asset Class Portlets comparing two scenarios from the same Scenario Comparison.

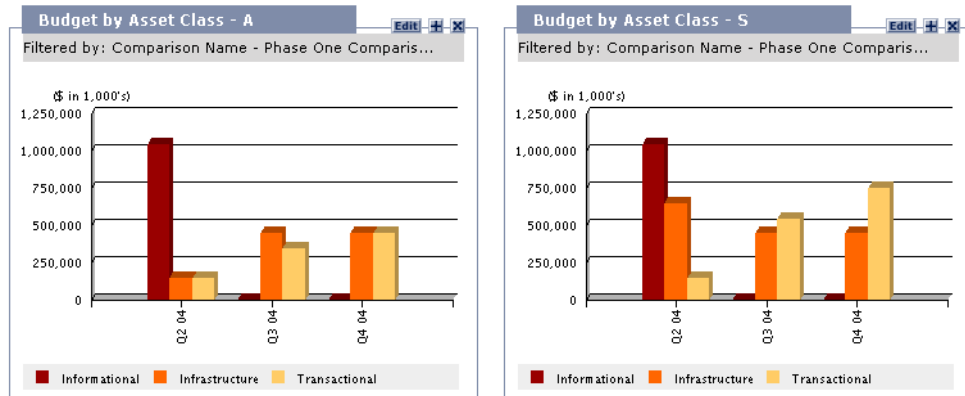


Figure 5-10 Budget by Asset Class Portlets comparing different scenarios

Table 5-5 describes the Scenario Comparison Portlets available.

Table 5-5. Scenario Comparison Portlets

Portlet	Description
Total Budget Summary	Similar to the Cost Plan graph in the Scenario Comparison page's <b>Overview</b> tab. Shows the total budget each scenario will consume per period, as well as the total budget available (if specified).
Total Resource Summary	Similar to the Resource Plan graph in the Scenario Comparison page's <b>Overview</b> tab. Shows the total Resource demand for each scenario per period, as well as the total Resources available (if specified).
Budget Summary	Similar to the graph in the Scenario Comparison page's <b>Budget Summary</b> tab. Displays Capital and Operational expense in a stacked bar chart.
Cost Benefit	Similar to the graph in the Scenario Comparison page's <b>Cost Benefit</b> tab. Displays a bar chart depicting the expected cost per period, as well as the expected benefit.
Budget by Asset Class	Similar to the graph in the Scenario Comparison page's <b>Budget by Asset Class</b> tab. Displays a bar chart with adjacent bars (one for each Asset Class) representing the budget for each period.
Budget by Project Class	Similar to the graph in the Scenario Comparison page's <b>Budget by Project Class</b> tab. Displays a bar chart with adjacent bars (one for each Project Class) representing the budget for each period.

*Table 5-5. Scenario Comparison Portlets*

Portlet	Description
Budget by Business Objective	Similar to the graph in the Scenario Comparison page's <b>Budget by Business Objective</b> tab. Displays a bar chart with adjacent bars (one for each Business Objective) representing the budget for each period.

For detailed descriptions of each Portlet's Edit page, see *"Portfolio Management and the Mercury ITG Dashboard"* on page 77.



## Appendix

# A

## User Licensing and Access

This appendix discusses the licenses, Access Grants, and Security Groups delivered with Mercury Portfolio Management.

The following topics are discussed:

- *Portfolio Management License*
- *Portfolio Management Access Grants*
- *Portfolio Management Security Groups*



Note

Licenses, user accounts and Security Groups are assigned by the Mercury ITG Center Administrator. Contact your application administrator for matters relating to Portfolio Management licenses.

## Portfolio Management License

The Portfolio Management license grants access to general Portfolio Management functionality and to configure general Portfolio Management settings. All users who will be using Portfolio Management must have a Portfolio Management license.

Some Portfolio Management functionality is controlled on a more granular level, either by groups of users or individuals. This level of access is controlled by *Portfolio Management Access Grants*.

## Portfolio Management Access Grants

Certain parts of Portfolio Management are controlled on a more granular level than the Portfolio Management license, which allows only general access to Portfolio Management. Portfolio Management Access Grants allow a Mercury ITG Administrator to grant partial or total access to these features to groups of users or individuals.

Users are linked to Access Grants through the Security Group they are a part of. For more information on Access Grants and Security Groups, see *“Portfolio Management Security Groups”* on page 75 or *Security Model Guide and Reference*.

The following sections discuss the features controlled by Access Grants, as well as the specific Access Grants for each feature:

- *Budget Access Grants*
- *Staffing Profile Access Grants*
- *Financial Benefit Access Grants*
- *Scenario Comparison Access Grants*

### Budget Access Grants

The Access Grants surrounding Budgets listed in *Table A-1*. Without these Access Grants, a user cannot view or edit a Budget regardless of whether they are specified in the list on the Budget’s Configure Access page.

*Table A-1. Budget Access Grants*

<b>Access Grant</b>	<b>Description</b>
View Budgets	The user can view any Budget for which they are on the specified View or Edit list.
View All Budgets	The user can view any Budget in the system.
Edit Budgets	The user can edit any Budget for which they are on the specified Edit list.
Create Budgets	The user can create new Budgets. Supplemental to the Edit Budgets or Edit All Budgets Access Grant.
Edit All Budgets	The user can edit any Budget in the system.
Update Budgets Status	The user can update the Budget Status, but nothing else. Supplemental to the Edit Budgets or Edit All Budgets Access Grant.

Table A-1. Budget Access Grants

Access Grant	Description
Approve Budgets	The user can set the Budget Status to <b>Approved</b> , but nothing else. Supplemental to the Edit Budgets or Edit All Budgets Access Grant.

## Staffing Profile Access Grants

The Access Grants surrounding Staffing Profiles are listed in [Table A-2](#). Without these Access Grants, a user cannot view or edit a Staffing Profile regardless of whether they are specified in the list on the Staffing Profile's Configure Access page.

Table A-2. Staffing Profile Access Grants

Access Grant	Description
View Staffing Profiles	The user can view any Staffing Profile for which they are on the specified View or Edit list.
View All Staffing Profiles	The user can view any Staffing Profile in the system.
Edit Staffing Profiles	The user can edit any Staffing Profile for which they are on the specified Edit list.
Create Staffing Profiles	The user can create new Staffing Profiles. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles Access Grant.
Edit All Staffing Profiles	The user can edit any Staffing Profile in the system.
Update Staffing Profiles Status	The user can update the Profile Status, but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles Access Grant.
Approve Staffing Profiles	The user can set the Profile Status to <b>Approved</b> , but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles Access Grant.

## Financial Benefit Access Grants

The Access Grants surrounding Financial Benefits are discussed in more detail in [Table A-3](#). Without these Access Grants, a user cannot view or edit a

Financial Benefit regardless of whether they are specified in the list on the Financial Benefit's Configure Access page.

*Table A-3. Financial Benefit Access Grants*

<b>Access Grant</b>	<b>Description</b>
View Financial Benefits	The user can view any Financial Benefit for which they are on the specified View or Edit list.
View All Financial Benefits	The user can view any Financial Benefit in the system.
Edit Financial Benefits	The user can edit any Financial Benefit for which they are on the specified Edit list.
Create Financial Benefits	The user can create new Financial Benefits. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits Access Grant.
Edit All Financial Benefits	The user can edit any Financial Benefit in the system.
Update Financial Benefit Status	The user can update the Financial Benefit Status, but nothing else. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits Access Grant.
Approve Financial Benefits	The user can set the Financial Benefit Status to <b>Approved</b> , but nothing else. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits Access Grant.

## Scenario Comparison Access Grants

The Access Grants surrounding Scenario Comparisons are listed in [Table A-4](#). Without these Access Grants, a user cannot view or edit a Scenario Comparison regardless of whether they are specified in the list on the Scenario Comparison's Configure Access page.

*Table A-4. Scenario Comparison Access Grants*

<b>Access Grant</b>	<b>Description</b>
View Scenario Comparisons	The user can view any Scenario Comparison for which they are on the specified View or Edit list.
Edit Scenario Comparisons	The user can view, edit and delete any Scenario Comparison for which they are on the specified Edit list, as well as create new Scenario Comparisons.



*Table A-4. Scenario Comparison Access Grants*

Access Grant	Description
Manage Scenario Comparisons	The user can view, edit and delete any Scenario Comparisons in the system, as well as create new Scenario Comparisons.

## Portfolio Management Security Groups

Security Groups are constructed to provide a set of users with specific access to screens and functions within Portfolio Management. Each Security Group is configured with a set of Access Grants that enable specific access. Users are then associated with one or more Security Groups.

A user's Security Group memberships determine which entities a user can view or edit, which processes a user can use, and which process steps a user has authority to act on. Each Portfolio Management user can be a member of multiple Security Groups. The collection of Security Groups to which a user belongs defines that user's role and access within Portfolio Management.

*Table A-5* lists the Security Groups provided with Portfolio Management.

*Table A-5. Portfolio Management Security Groups*

Security Group
PFM - Biz Ops Council
PFM - Finance Review Board
PFM - IT Steering Committee
PFM - Manager
PFM - Resource Review Board
PFM - Standards Committee



# Appendix B

## Portfolio Management and the Mercury ITG Dashboard

This appendix describes the Portlets delivered with Mercury Portfolio Management and provides definitions for their filter fields.

The following topics are discussed:

- *Current Portfolio Map Portlet*
- *Portfolio by Category Portlet*
- *Resource by Category Portlet*
- *Total Budget Portlet*
- *Total Resource Portlet*
- *Budget Summary Portlet*
- *Cost Benefit Analysis Portlet*
- *Budget by Asset Class Portlet*
- *Budget by Project Class Portlet*
- *Budget by Business Objective Portlet*

### Current Portfolio Map Portlet

The Current Portfolio Map Portlet displays a configurable bubble chart representing the Projects and Assets currently active. *Table B-1* describes the Portlet's filter fields.

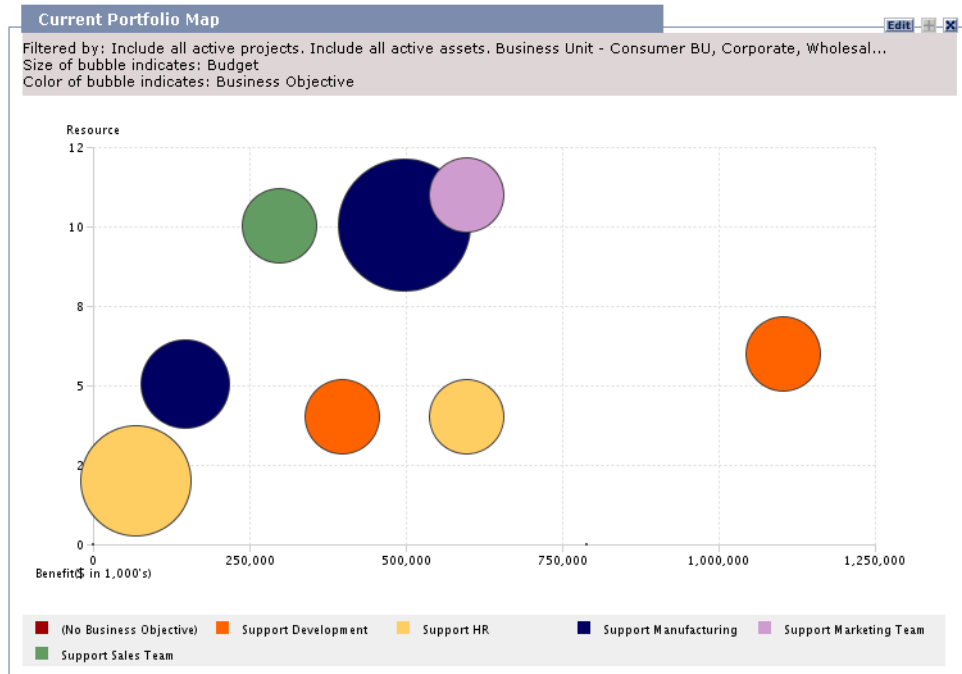


Figure B-1 Current Portfolio Map Portlet

Table B-1. Current Portfolio Map Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Include the following projects in graph	Selects the Projects to show in the Portlet. Includes a multi-select auto-complete field.
Include the following assets in graph	Selects the Assets to show in the Portlet. Includes a multi-select auto-complete field.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the Portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the Portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the Portlet by Asset Class. A multi-select auto-complete field.

Table B-1. Current Portfolio Map Portlet - Filter Fields

<b>Field</b>	<b>Description</b>
Value greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain Value range.
Risk greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain Risk range.
Score greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain qualitative Score range.
<b>Financial Information</b>	
Budget total greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain Budget range.
Benefit total greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain Financial Benefit range.
Resource total (person months) greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain resource total by person month range.
Return on Investment greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain ROI range.
Net Present Value greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain NPV range.
Custom Value greater than (N) and less than (M)	Allows you to filter the Portlet by selecting entities within a certain custom value range.
<b>Display Options</b>	
Horizontal Axis	Specifies the scalar for the bubble chart's horizontal axis.
Vertical Axis	Specifies the scalar for the bubble chart's vertical axis.
Color of bubble indicates	Chooses what the color of the bubbles indicates.
Size of bubble indicates	Chooses what the size of the bubbles indicates.

## 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. *Table B-2* describes the Portlet's filter fields.

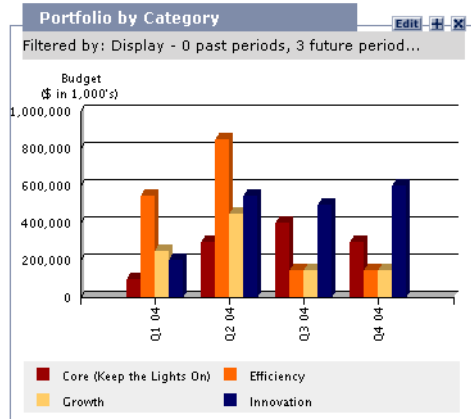


Figure B-2 Portfolio by Category Portlet

Table B-2. Portfolio by Category Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Include Proposals	Selects the Proposals to show in the Portlet. Includes a multi-select auto-complete field.
Include Projects	Selects the Projects to show in the Portlet. Includes a multi-select auto-complete field.
Include Assets	Selects the Assets to show in the Portlet. Includes a multi-select auto-complete field.
<b>Time Period</b>	
Period	Selects the type of time period to display.
Display X Past Periods	Specifies the number of past time periods to display.
Display X Future Periods	Specifies the number of future time periods to display.
<b>Display Options</b>	

Table B-2. Portfolio by Category Portlet - Filter Fields

Field	Description
Show	Selects the financial value to display.
Group By	Selects a category to group the values by.

## 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. [Table B-3](#) describes the Portlet's filter fields.

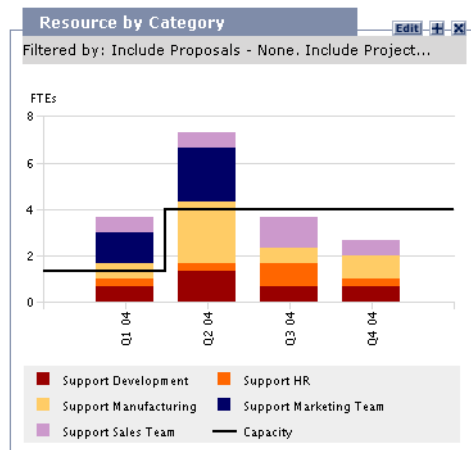


Figure B-3 Resource by Category Portlet

Table B-3. Resource by Category Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Include Proposals	Selects the Proposals to show in the Portlet. Includes a multi-select auto-complete field.

*Table B-3. Resource by Category Portlet - Filter Fields*

<b>Field</b>	<b>Description</b>
Include Projects	Selects the Projects to show in the Portlet. Includes a multi-select auto-complete field.
Include Assets	Selects the Assets to show in the Portlet. Includes a multi-select auto-complete field.
Calculate Total Available Resources from the Following Resource Pools	Selects the Resource Pools that will be used to calculate total Resource capacity for the Portlet.
<b>Time Period</b>	
Period	Selects the type of time period to display.
Display X Past Periods	Specifies the number of past time periods to display.
Display X Future Periods	Specifies the number of future time periods to display.
<b>Display Options</b>	
Group By	Selects a category to group the values by.

## 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. [Table B-3](#) describes the Portlet's filter fields.



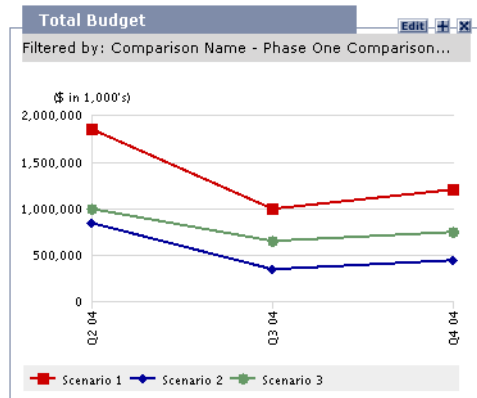


Figure B-4 Total Budget Portlet

Table B-4. Total Budget Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Comparison Name	Selects a Scenario Comparison to display.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the Portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the Portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the Portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display Proposals, Projects, or Assets.
<b>Time Range</b>	
Show entire time range	Displays the entire time range considered in the selected Scenario Comparison.
Show from X to X	Displays a specific time range.
<b>Restore Defaults</b>	Restores the Portlet's default settings.
<b>Display Options</b>	
Period	Selects the type of time period to display.

## 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. The filter fields for the Total Resource Portlet are identical to the *Total Budget Portlet* and are described in *Table B-4*.

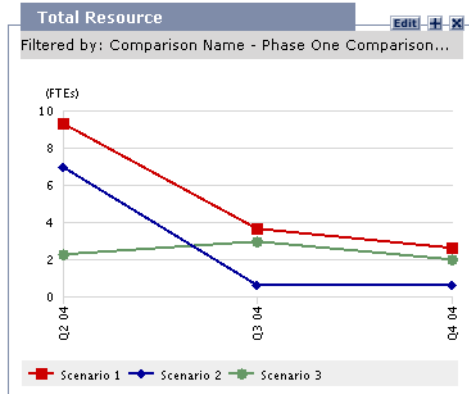


Figure B-5 Total Resource Portlet

## 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. *Table B-5* describes the Portlet's filter fields.

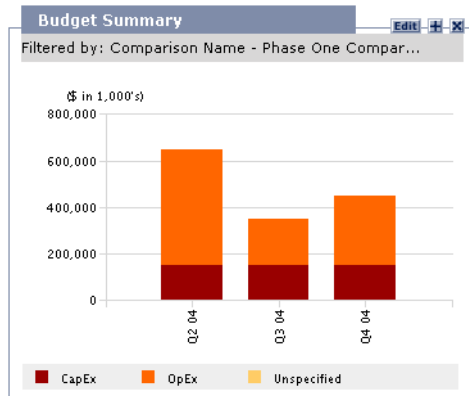


Figure B-6 Budget Summary Portlet

Table B-5. Budget Summary Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Comparison Name	Selects a Scenario Comparison to display.
Scenario Name	Selects a scenario to display from the specified Scenario Comparison.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the Portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the Portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the Portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display Proposals, Projects, or Assets.
<b>Time Range</b>	
Show entire time range	Displays the entire time range considered in the selected Scenario Comparison.
Show from X to X	Displays a specific time range.
<b>Restore Defaults</b>	Restores the Portlet's default settings.

Table B-5. Budget Summary Portlet - Filter Fields

Field	Description
<b>Display Options</b>	
Period	Selects the type of time period to display.

## 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. The filter fields for the Cost Benefit Analysis Portlet are identical to the *Budget Summary Portlet* and are described in *Table B-5*.

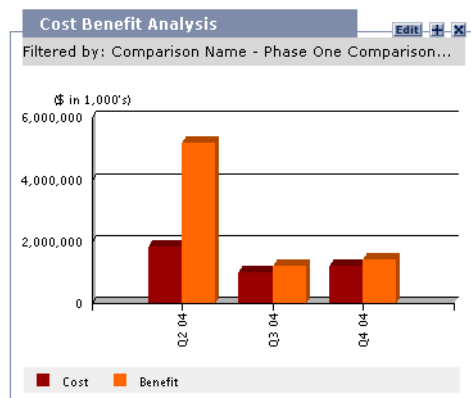


Figure B-7 Cost Benefit Analysis Portlet

## 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 B-6* describes the Portlet's filter fields.

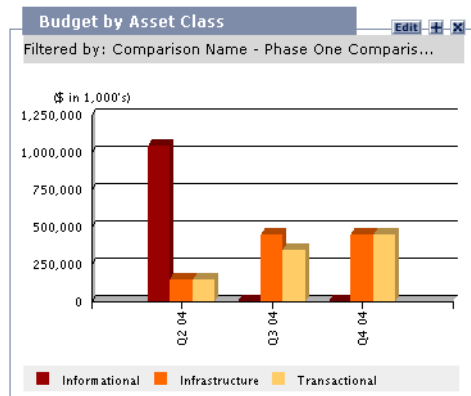


Figure B-8 Budget by Asset Class Portlet

Table B-6. Budget by Asset Class Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Comparison Name	Selects a Scenario Comparison to display.
Scenario Name	Selects a scenario to display from the specified Scenario Comparison.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the Portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the Portlet by Project Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display Proposals, Projects, or Assets.
<b>Time Range</b>	
Show entire time range	Displays the entire time range considered in the selected Scenario Comparison.
Show from X to X	Displays a specific time range.
<b>Restore Defaults</b>	Restores the Portlet's default settings.
<b>Display Options</b>	
Period	Selects the type of time period to display.

## 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. [Table B-7](#) describes the Portlet’s filter fields.

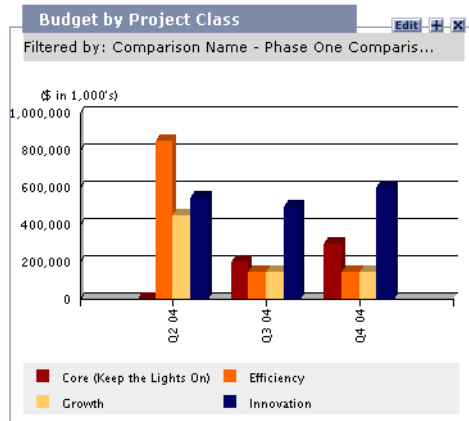


Figure B-9 Budget by Project Class Portlet

Table B-7. Budget by Project Class Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Comparison Name	Selects a Scenario Comparison to display.
Scenario Name	Selects a scenario to display from the specified Scenario Comparison.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the Portlet by Business Objective. A multi-select auto-complete field.
Asset Class	Filters the Portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display Proposals, Projects, or Assets.
<b>Time Range</b>	

Table B-7. Budget by Project Class Portlet - Filter Fields

Field	Description
Show entire time range	Displays the entire time range considered in the selected Scenario Comparison.
Show from X to X	Displays a specific time range.
<b>Restore Defaults</b>	Restores the Portlet's default settings.
<b>Display Options</b>	
Period	Selects the type of time period to display.

## 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 B-8](#) describes the Portlet's filter fields.

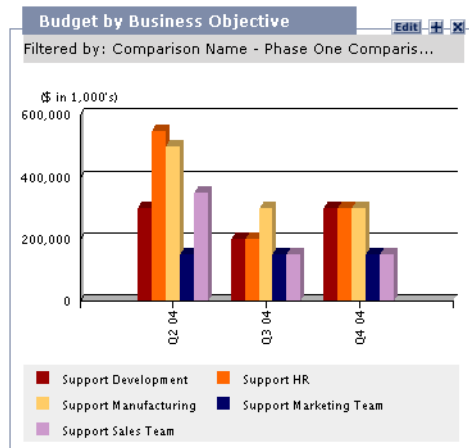


Figure B-10 Budget by Business Objective Portlet

Table B-8. Budget by Business Objective Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.

*Table B-8. Budget by Business Objective Portlet - Filter Fields*

<b>Field</b>	<b>Description</b>
Comparison Name	Selects a Scenario Comparison to display.
Scenario Name	Selects a scenario to display from the specified Scenario Comparison.
Business Unit	Filters the Portlet by Business Unit. A multi-select auto-complete field.
Project Class	Filters the Portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the Portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display Proposals, Projects, or Assets.
<b>Time Range</b>	
Show entire time range	Displays the entire time range considered in the selected Scenario Comparison.
Show from X to X	Displays a specific time range.
<b>Restore Defaults</b>	Restores the Portlet's default settings.
<b>Display Options</b>	
Period	Selects the type of time period to display.



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