

**Mercury IT Governance Center™**

**Mercury Program Management  
User's Guide**

Version: 7.0



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**Chapter**

**1**

# **Getting Started with Mercury Program Management**

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**In This Chapter:**

- *Introduction to Mercury Program Management*
  - *Overview of Program Management*
  - *Related Documents*
-

## Introduction to Mercury Program Management

Mercury Program Management™ is a Mercury IT Governance Center™ product that provides a single location from which to initiate, operate, and manage your organization's portfolio of programs and projects.

You can use Program Management to:

- Align IT projects with business objectives
- Eliminate duplicate and low-priority efforts
- Improve operational efficiency
- Ensure delivery on time and within budget

To help you meet these business requirements, Program Management provides a full program lifecycle solution. It enforces the systematic capture of all relevant functional specifications and priorities. Business user approvals based on project scope, budget level, and other business rules are built in. The program provides a single location from which to view and control relevant projects and requests.

## Overview of Program Management

A program is a set of related projects that are grouped together, usually to coordinate efforts toward achieving a business goal. With Program Management, you can create programs that provide a high-level perspective on projects underway in your organization.



Note

For information on how to create programs, see [Chapter 2, \*Creating Programs\*, on page 15](#). For information on how to view programs and update program priorities, general information, health indicators, and security, see [Chapter 4, \*Viewing and Modifying Programs\*, on page 33](#).

You might organize projects into a program for many different reasons. You can create a program to manage a group of projects that were all designed to meet a single business objective. For example, you could design a program around a single deliverable (a project that requires infrastructure, coordinated development, and other deliverables), or around work performed for a given client.

How you group projects into programs typically reflects how your organization controls projects internally. Each program has one or more owners (program managers) who are responsible for the overall coordination of the projects, resolution of issues that cannot be resolved through individual projects, overall budget management, and so on.

In some cases, a program is designed to provide visibility into a set of projects that share something in common, but do not share a business goal. For example, you can create a program that provides a department with a consolidated picture of all the projects it “owns,” even though the individual projects are part of otherwise unrelated programs.

You can use Program Management to assess the various risks, issues, and changes in scope that arise during the life of a program, and make the changes necessary to manage these events.



Note

For information on how to configure business objectives and associate them with programs, and on how to use requests to address concerns that arise during the life of a program, see [Chapter 3, Business Objectives, Issues, Risks, and Scope Changes, on page 19](#). For information on how to manage your programs, see [Chapter 5, Managing Programs, on page 63](#)

Program Management can help you:

- Oversee related IT projects
- Coordinate inter-project deliverables and milestones
- Manage scope change
- Identify and mitigate risks
- Resolve inter-project issues

You access the Mercury Program Management interface through the Mercury IT Governance Dashboard™ and menu bar. The Dashboard displays portlets that you can customize to fit your specific business requirements.



Note

For information about the Program Management portlets that you can display on your Dashboard pages, see [Chapter 6, Program Manager Page, on page 83](#)

Along the left side of the standard interface is the menu bar, which consists of hierarchically organized task menus. You perform most Program Management work through the items listed under the **Program Management** menu. However, to perform some of the tasks described in this document, you use the **Project**

Management and Administration menus. *Figure 1-1* shows the menu bar and, to its right, the Dashboard.

Figure 1-1. Menu bar and Dashboard

The screenshot displays the Mercury Program Management interface. At the top, there is a navigation bar with the Mercury logo, a 'SIGN OUT' button, and a breadcrumb trail: 'Dashboard > Front Page > Dashboard - Program Manager'. Below this, a welcome message for 'Admin User' is shown along with the current date and time. The main content area is divided into several sections:

- Program List:** A table showing program details.
 

Program Name	Relative Priority	Program Manager	Program State	Issues	Risks	Scope Changes
Enterprise Business Apps		Carolyn Sayer	Active	5	2	1
Major Infrastructure Activities		Carolyn Sayer	New	5	3	1
- Program Project List:** A table listing projects within a program.
 

Project Name	Project Manager	Project ID
Change Actualizat...	azumwat	30210
ERP Upgrade	jbanks;krishna	30018
IT: Detect proces...	jbanks;krishna	30125
Internal Web Site...	jbanks	30016
Internal Web Site...	jbanks	30015
- Issue List:** A table listing issues.
 

Project	Issue #	Priority	Escalation Level	Status	Description
ERP Upgrade	30062	Normal	Project	Closed	development servers have not arrived and developers need ...
ERP Upgrade	30150	Critical	Project	New	Company shutdown directly impacts delivery timeline
ERP Upgrade	30151	Normal	Project	New	We need another cube for contractors expected next month
- Program Scope Change List:** A table listing scope changes.
 

Project	Scope Change #	Severity	Change Request Level	Status	Description
ERP Upgrade	30066	High	Level 1	New	Automate Revenue recognition deferral timing ba...
- Program Risk List:** A table listing risks.
 

Project	Risk #	Probability	Impact Level	Status	Description
ERP Upgrade	30064	Medium [11...	Level 1	New	Resource drain due to KTLO activities
ERP Upgrade	30065	Medium [11...	Level 1	New	Org change management for the project is signif...
IT: Detect p...	30221	Medium [11...	Level 2	New	All departments must submit complete requirements
Internal Web...	30219	Medium [11...	Level 2	Closed	Limited time to research archived data.

On the left side, there is a vertical navigation menu with categories such as Dashboard, Demand Management, Project Management, Time Management, Resource Management, Program Management, Business Objectives, Issues, Risks, Scope Changes, Portfolio Management, Financial Management, Deployment Management, Reports, Administration, and Product Information.

## Related Documents

Mercury recommends that, in addition to this guide, you consult the following related documents:

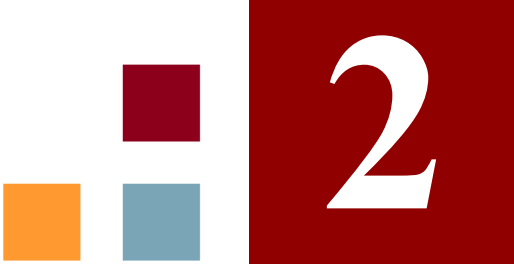
- *Mercury Program Management Configuration Guide*
- *Mercury Project Management User's Guide*
- *Mercury Demand Management User's Guide*
- *Mercury Financial Management User's Guide*
- *Mercury-Supplied Entities Guide* (includes descriptions of all Mercury Program Management portlets, request types, and workflows)



Note

Many Program Management controls are modeled based on *A Guide to the Project Management Body of Knowledge* (PMBOK Guide from the Project Management Institute). These program controls include issues, risks, and scope changes.





**Chapter**  
**2**  
**Creating Programs**

---

**In This Chapter:**

- *Overview of Creating Programs*
  - *Creating Programs*
-

## Overview of Creating Programs

A program is a collection of projects and associated scope changes, risks, and issues. Programs feature full drill-down into projects and roll-up of relevant data. Like projects, programs have health indicators and configurable exception indicators. This chapter provides details on how to create programs in Mercury IT Governance Center.

For example, at XYZ Corporation, a manager creates a program to oversee the upgrade of the customer Service computer system for better integration with the Sales force. The Customer Service, Sales, and IT managers create the projects. Each resource handles his or her own part of the work, which is linked to and monitored through the program. At the same time, risks and scope changes submitted against the program are tracked and managed.

## Creating Programs

To create a program, you must have the Program Management license and either the Edit Programs or Edit All Programs access grant.

To create a program:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Create a Program**.



The Create New Program page opens.

The screenshot shows the 'Create New Program' page in the Mercury IT Governance Center. The page has a red header with the Mercury logo and a 'SIGN OUT' button. The breadcrumb trail is: Create New Business Objective > Manage Business Objectives > Modify Increase Sales 2.5% > Manage Business Objectives > Create New Program. The main content area is titled 'Create New Program' and contains several sections:

- Program Name:** A text input field.
- Program Managers:** A dropdown menu with a user icon.
- Description:** A text area with a scroll bar.
- Benefit:** A text area with a scroll bar.
- Status Notes:** A text area with a scroll bar.
- Program Budget:** A section with a 'Budget:' label and a text input field, followed by a 'View' button.
- Projects:** A table with columns: Project Name, % Complete, Project State, Sched, Sched, and Project. An 'Add Project' button is below the table.
- Business Objectives:** A table with columns: Name, State, Owner, Priority, and Description. An 'Add Business Objective' button is below the table.
- Notes:** A section with a 'New Note:' label and a text area with a scroll bar.

A 'Create' button is located at the bottom right of the form area.

3. In the **Program Name** field, type the program name.
4. Enter some or none of the following program information:
  - Use the **Program Managers** field to select one or more resources to assign program managers.
  - In the **Description** field, type a program description.
  - In the **Benefit** field, type text that describes the benefit of the program.
  - In the **Status Notes** field, type any additional information you want to record about the program status.
  - In the **Program Budget** section, select an active program budget.



Note

For information on how to work with program budgets, see the *Mercury Financial Management User's Guide*.

5. To add one or more projects to the program:
  - a. In the **Projects** section, click **Add Project**.

A project search window opens.
  - b. Select the projects to add to the program, and then click **OK**.

The **Projects** section lists the projects you added.
6. In the **Business Objectives** section, add one or more business objectives to the program, as follows:
  - a. Click **Add Business Objective**.

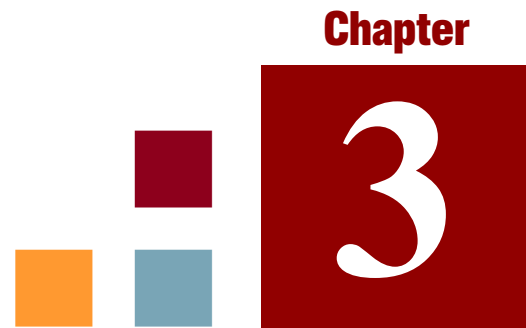
A window opens and displays the list of existing business objectives.
  - b. Select the business objective to associate with the program.

The business objective is added to the program. To add more business objectives to the program, repeat this step.



For information on how to create and manage business objectives, see [Chapter 3, \*Business Objectives, Issues, Risks, and Scope Changes\*, on page 19](#).

7. In the **Notes** section, in the **New Note** field, you can type any supplementary information about the program that you want to record.
8. Click **Create**.



## **Business Objectives, Issues, Risks, and Scope Changes**

---

### **In This Chapter:**

- *Overview of Business Objectives*
    - *Creating Business Objectives*
    - *Managing Business Objectives*
  - *Submitting Issues, Risks and Project Scope Changes*
    - *Submitting Program Issues*
    - *Submitting Project Issues*
    - *Submitting Project Risks*
    - *Submitting Project Scope Changes*
-

## Overview of Business Objectives

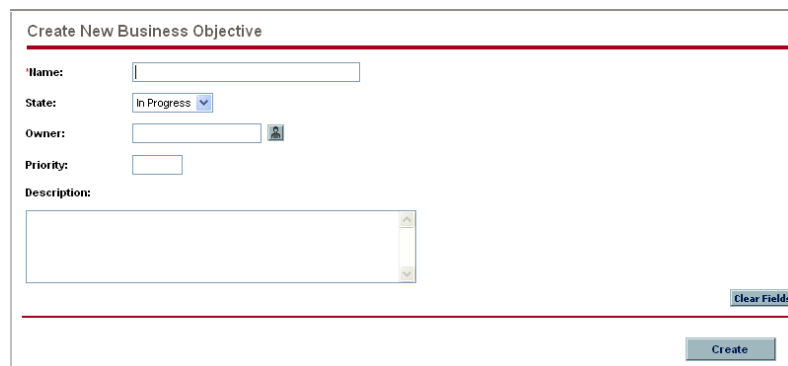
Business objectives provide a way for you to capture business goals as discrete entities that you can then prioritize and tie to other Mercury IT Governance Center entities, including programs. For example, XYZ Corporation creates the business objective “Reduce order to delivery time,” assigns it a priority, and associates it with a program created to upgrade the customer service system. You can create business objectives in either Mercury Portfolio Management™ or Program Management.

You can associate a program with existing objectives. If you want to associate a program with a business objective that does not yet exist, you can either create the business objective before you create the program, or create it later and make the association after you create the program. This section provides the steps you use to create business objectives from Program Management.

## Creating Business Objectives

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Business Objectives > Create a Business Objective**.

The Create New Business Objective page opens.



The screenshot shows a web form titled "Create New Business Objective". The form has the following fields and controls:

- Name:** A text input field.
- State:** A dropdown menu currently showing "In Progress".
- Owner:** A text input field with a small user icon to its right.
- Priority:** A text input field.
- Description:** A large text area with a vertical scrollbar.
- Buttons:** A "Clear Fields" button and a "Create" button are located at the bottom right of the form.

3. Enter all required information, and any optional information about the business objective that you want to add.
4. Click **Create**.

The Manage Business Objectives page now lists the new objective.

## Managing Business Objectives

This section contains information about how to edit and delete business objectives.

### *Editing Business Objectives*

Because business objectives can change over time, you may want to update them by adding details or removing obsolete information.

To edit a business objective:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Business Objectives > Manage Business Objectives**.

The Manage Business Objectives page opens and lists existing objectives.

Manage Business Objectives					
	Name	Status	Owner	Priority	Description
<input checked="" type="checkbox"/>	Compliance	In Progress	Benjamin U. Cason	2	Ensure that practices in place are in compliance with regulatory requirements.
<input checked="" type="checkbox"/>	Efficiency Across Teams	In Progress	Barbara Getty		
<input checked="" type="checkbox"/>	Expand to new markets	In Progress	Dennis Morrison	1	Deploy sales force in new Pacific NW office.
<input checked="" type="checkbox"/>	Top of the line infrastructure	Achieved	Ron Steel	1	

[Create New Business Objective](#)

3. In the **Name** column, click the name of a business objective you want to modify.

The Modify Business Objective page opens.

**MERCURY** SIGN OUT

IT Governance Center Dashboard - Front Page > Create New Business Objective > Manage Business Objectives > Modify Increase Sales 2.5%

Modify Increase Sales 2.5%

Name:

State:

Owner:

Priority:

Description:

[Clear Fields](#)

[Done](#) [Cancel](#)

4. Make necessary changes to the field values, and then click **Done**.

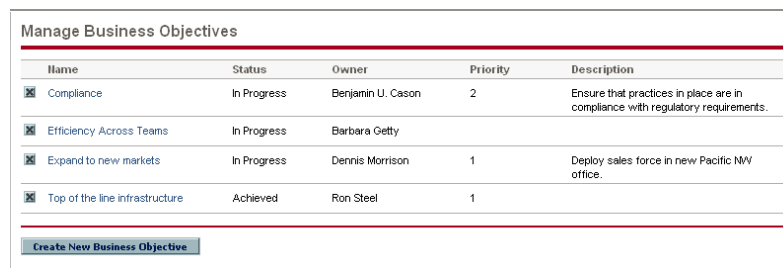
## Deleting Business Objectives

If a business objective becomes obsolete, you can delete it.

To delete business objectives:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Business Objectives > Manage Business Objectives**.

The Manage Business Objectives page opens and lists existing objectives.



Name	Status	Owner	Priority	Description
<input checked="" type="checkbox"/> Compliance	In Progress	Benjamin U. Cason	2	Ensure that practices in place are in compliance with regulatory requirements.
<input checked="" type="checkbox"/> Efficiency Across Teams	In Progress	Barbara Getty		
<input checked="" type="checkbox"/> Expand to new markets	In Progress	Dennis Morrison	1	Deploy sales force in new Pacific NW office.
<input checked="" type="checkbox"/> Top of the line infrastructure	Achieved	Ron Steel	1	

[Create New Business Objective](#)

3. To the left of the obsolete objective, click the **Delete** icon.

Mercury Program Management prompts you to confirm that you want to delete the objective.

4. Click **OK**.

## Submitting Issues, Risks and Project Scope Changes

During the life of a program, concerns surface that must be addressed. Mercury IT Governance Center provides a framework to identify and resolve such concerns in the form of requests. You can submit (create), track, reject, complete, and report on requests.

The following requests can affect programs:

- **Program Issues.** To manage problems having to do with running the program itself, you can submit program issues. For example, if you have a problem assigning a manager or support staff to a program, or if a change in corporate direction requires that you reassess program goals, you can. If an issue logged against a project linked to a program cannot be resolved by the project manager, then it needs to be visible at the program level. Program issues often involve coordination among multiple projects.

- **Project Issues.** Project issues introduce a framework for all project-related issues to identify and resolve. Issues can span multiple request types, to provide a more detailed view of the resolution process.

For example, although bugs and enhancements are both issues and may share common fields for tracking purposes, each request type is processed along its own assigned workflow.

- **Project Risks.** Risks supply a way to log and resolve threats to a project. The process of gathering information about possible risks, including impacts and probability of occurrence, is streamlined. You can configure program health indicators to alert users to varying levels of risk.

For example, the program manager at XYZ Corporation configures the customer service upgrade program to show a red indicator if more than two risks that have an impact level of 1 and probability factor of High are created.

- **Project Scope Changes.** Scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. Submitted scope change requests can be assessed before they are rejected or incorporated into program or project scope. To control program and project scope, ensure that possible changes are clearly identified, aligned, and processed.

## Submitting Program Issues

During the life of a program, a problem may arise or a business decision may be made that you must add as a program issue. Such changes can be brought up, processed, and decided on in the form of issues. You can use the Program Management Issues request type to identify these issues, collect key information (impact level and probability of occurrence), and deal with them in a timely manner.

To submit a program issue:



Note

To submit a program issue, you must be specified as a PMO - Issue request type participant who can create program issues. This is set in the Request Type window from the Request Workbench.

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Issues > Submit a Program Issue**.



Note

If you have the required permission, you can also use Mercury Demand Management™ to submit a program issue



The Create New Program Issue page opens.

3. Enter information in all required fields, which are **Program**, **Priority**, **Description**, and **Date Identified**.



Note

In Program Management, issues are grouped according to their assigned priority values. The values entered in the **Priority** field are used to calculate program health.

The **Date Identified** field is used to calculate and issue resolution time.

4. Enter any optional information you want to associate with this issue.
5. Click **Submit**.

The submitted program issue request begins to move along its automatically assigned workflow toward resolution.

## Submitting Project Issues

To manage the obstacles and business challenges that arise during the life of a project, use Project Management Issues request types. Project issues identify, collect key information about them (impact level and probability of occurrence), and deal with them in a timely manner.

To submit a project issue:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Project Management > Project Controls > Submit a Project Issue**.

The Create New Project Issue page opens.

The screenshot shows the 'Create New Project Issue' form. At the top, there are 'Expand All' and 'Collapse All' buttons, and a 'Submit' button. Below this is a navigation pane with 'Header' and 'Summary' sections. The main form area includes: 'Issue Status: Not Submitted', 'Created By: Admin User', and 'Assigned To:' with a user selection icon. Fields for '\*Project:', '\*Priority:', and '\*Escalation Level:' (set to 'Project') are present. A '\*Description:' field is also included. Below this is another navigation pane with 'Details' and 'Issue Details' sections. The 'Issue Details' section contains: '\*Date Identified:' and 'Due Date:' with calendar icons; 'Issue Type:' dropdown; 'Detailed Description:', 'Proposed Solution:', and 'Business Function:' text areas with scrollbars. At the bottom, there are 'Notes' and 'References' sections, and 'Submit' and 'Cancel' buttons.

3. Enter all required information (in fields marked with a red asterisk) and any optional information related to the issue that you want to record.



For a project issue to show up in Program Management, you must add the project to the program (or add a program as a reference to the project issue), and, in the **Summary** section of the Project Issue detail page, select **Program** in the **Escalation Level** list.

4. To add a program as a reference to the project issue:
  - a. At the bottom of the Create New Project Issue page, expand the **References** section.
  - b. In the **New Reference** list, select **Program**.
  - c. Click **Add**.

The Reference Program window opens.
  - d. Use the **Program** field to select the program to which you are adding the issue as a reference.
  - e. Click **Add**.

At the bottom of the Create New Project Issue Page, the **References to be added on Save** field displays the name of the program you selected.

5. Click **Submit**.

The submitted project issue request begins to move along its assigned workflow toward resolution.

## Submitting Project Risks

As a program evolves, risks to projects linked to the program can develop. You can use the project risk request type to identify these risks, collect information about them (impact level and probability of occurrence), and deal with them quickly.

To submit a project risk:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Project Management > Project Controls > Submit a Risk**.

The Create New Project Risk page opens.

The screenshot shows the 'Create New Project Risk' form. The form is titled 'Create New Project Risk' and has a 'Submit' button in the top right. It is divided into sections: 'Header' and 'Summary' (collapsed), 'Details' and 'Risk Details' (expanded), and 'Notes' and 'References' (collapsed). The 'Summary' section contains 'Created By: Admin User', 'Risk Status: Not Submitted', and 'Assigned To:'. The 'Risk Details' section contains 'Project:', 'Priority:', 'Risk Impact Level:', 'Probability:', and 'Description:'. Below this are 'Risk Type:', 'Date Identified:', 'Detailed Description:', 'Closure Criteria:', and 'Action Plan:'. At the bottom are 'Submit' and 'Cancel' buttons.

3. In the **Project** field, enter the name of the project with which the risk is associated.
4. In the **Risk Impact Level** list, select a value to indicate risk severity.

■ ■ Note

The risk impact level is used in analyzing risk activity and calculating risk resolution time. For more information, see [Analyzing Risk Activity on page 74](#) and [Analyzing Risk Resolution Time on page 75](#).

5. In the **Probability** list, select a value to indicate the estimated likelihood that the risk can occur.
6. In the **Risk Details** section, in the **Date Identified** field, enter the calendar date on which the risk was recognized.

■ ■ Note

The date the risk was identified is used to calculate risk resolution time. For more information, see [Analyzing Risk Resolution Time on page 75](#).

7. Enter any optional information about the risk that you want to record.

For the project risk to show up in Program Management, you must add a project associated with a program or the program itself as a reference to the project risk.

8. To add a program as a reference to the project risk:

- a. Expand the **References** section.
- b. In the **New Reference** list, select **Program**.
- c. Click **Add**.

The Reference Program window opens.

- d. Use the **Program** field to select the program to which you are adding the project risk as a reference.
- e. Click **OK**.
- f. In the Reference Program Window, click **Add**.

At the bottom of the Create New Project Risk Page, the **References to be added on Save** field displays the name of the program you selected.

9. Click **Submit**.

The submitted project risk begins to move through its workflow toward resolution.

## Submitting Project Scope Changes

Events during the life of a program may require changes in program scope. These changes can be brought up, processed, and acted on in the form of Program Management Scope Change request types.

To submit a project scope change:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Project Management > Project Controls > Submit a Scope Change**.

The Create New Project Scope Change Request page opens.

Create New Project Scope Change Request

Expand All Collapse All Submit

Header

Summary

Scope Change Status: Not Submitted

Created By: Admin User Assigned To: [User Selection Icon]

\*Project: [Text Input]

Priority: [Dropdown] \*CR Level: [Dropdown] \*Business Impact Severity: [Dropdown]

\*Description: [Text Input]

Details

Scope Change Details

Assigned Release: [Text Input] Target Implementation Date: [Text Input with Calendar Icon]

Detailed Description: [Text Area]

Benefit of Proposed Change: [Text Area]

Alternatives: [Text Area]

List of Impacted Deliverables: [Text Area]

Impact Summary: [Text Area]

Financial Impact: \$ [Text Input] Schedule Impact (in days): [Text Input]

Notes

References

Submit Cancel

3. In the **Project** field, enter the name of the project associated with the scope change.

4. In the **CR Level** list, select a value to indicate the size of the scope change.

**Level 1** indicates a larger scope change request than **Level 2**, and **Level 2** indicates a larger scope change request than **Level 3**. Only scope changes requests that are assigned **Level 1** or **Level 2** are visible in Program Management.

5. Enter all required information (in fields marked with a red asterisk) and any optional information about the scope change that you want to record.

For the scope change request to show up in Program Management, you must add a project associated with a program or the program itself as a reference to the scope change request.

To add a program as a reference to the scope change request:

- a. Expand the **References** section.
- b. In the **New Reference** list, select **Program**.
- c. Click **Add**.

The Reference Program window opens.

- d. Use the **Program** field to select the program to which you are adding the project risk as a reference.
- e. Click **OK**.
- f. In the Reference Program window, click **Add**.

At the bottom of the Create New Project Scope Change Request page, the **References to be added on Save** field displays the name of the program you selected.

6. Click **Submit**.

The project scope change request begins to progress through its workflow toward resolution.





## Chapter

# 4

## Viewing and Modifying Programs

---

### In This Chapter:

- *Overview of Modifying Programs*
  - *Updating Program Priorities*
  - *Searching for and Viewing Programs*
  - *Modifying General Program Information*
  - *Configuring Program Indicators*
    - *Project and Program Issues*
    - *Program Risks*
    - *Program Scope Changes*
    - *Financial Management*
    - *Modifying Program Indicator Settings*
  - *Configuring Program Access*
  - *Program References*
    - *Attachments as References*
    - *Existing Packages as References*
    - *New Packages as References*
    - *Projects as References*
    - *Existing Requests as References*
    - *New Requests as References*
    - *Tasks as References*
    - *URLs as References*
-

## Overview of Modifying Programs

During the life of a program, much can happen that requires you to modify the program. You can update the following aspects of a program:

- Priority (Prioritize Programs page)
- General information (Modify Programs page)
- Health indicators (Adjust Program Settings page)
- Access settings (Configure Access Program page)

The following sections provide the steps used to perform each of these tasks.

## Updating Program Priorities

Over time, as some business objectives are met and others become more pressing, you can change the priorities of the programs underway in your organization. This helps to ensure that the most critical issues maintain high visibility for stakeholders.

To change the priority of a program relative to other programs set up for your organization, do the following:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Prioritize Programs**.

The Prioritize Programs page opens and lists existing programs. If the programs have been assigned priority values, the page lists them in descending order of priority.

Program Name	Relative Priority	Program Managers	Program Status	Business Objectives	Description
IT Hardware Upgrade	3	Adam Dubrow	Active	Test#1; dbranchen testing	Upgrade the IT hardware.
dbranchen testing	2	dave branchen	New		
sm	2		New		
End of Year Push	1	Adam Dubrow	New	Increase Sales 2.5%	end of year push

3. In the **Relative Priority** field to the right of the program name, type an integer that indicates the new priority level.
4. If necessary, change the relative priority values for other programs listed.
5. Click **Save**.

## Searching for and Viewing Programs

To search for and view an existing program:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Search Programs**.

The Search Programs page opens.

The screenshot shows the Mercury IT Governance Center interface. The top navigation bar includes the Mercury logo, the text "IT Governance Center", and a breadcrumb trail: "Create A Request > Create New Project Scope Change Request > View Program > Prioritize Programs > Search Programs". A "SIGN OUT" button is in the top right corner. Below the navigation bar is a "Help With Search Programs" link. The main content area is titled "Search Programs" and contains a "Search for a Program to View" section. This section includes several search criteria fields: "Program Name", "Program Managers", "Program Status", "Contains Project", "Created By", "Business Objectives", "Relative Priority From" and "To", and "Creation Date From" and "To". At the bottom of the search section, there is a "Sort By" dropdown menu set to "Program Name", radio buttons for "Ascending" (selected) and "Descending", and a "Results Displayed Per Page" field set to "50". A "Search" button is located at the bottom right of the search section.

3. Enter your search criteria, and then click **Search**. Alternatively, to see a list of all programs, click **Search** without entering search criteria.

The Search Programs page lists the programs that meet your search criteria.

The screenshot displays the Mercury IT Governance Center interface for searching programs. At the top, there is a navigation bar with the Mercury logo and a 'SIGN OUT' button. Below the navigation bar, the breadcrumb trail reads: 'IT Governance Center > Create A Request > Create New Project Scope Change Request > View Program > Prioritize Programs > Search Programs'. A 'Help With Search Programs' link is available. The main content area is titled 'Search Programs' and includes an 'Export to Excel' button. A table titled 'Select a Program to View' shows the following data:

Program Name	Relative Priority	Program Managers	Program Status	Description
End of Year Push		Adam Dubrow	New	end of year push
IT Hardware Upgrade	1	Adam Dubrow	Active	Upgrade the IT hardware.
dbranchen testing		dave branchen	New	
sm			New	

Below the table, there is a search form titled 'Search for a Program to View'. The form includes the following fields and options:

- Program Name:
- Program Managers:  (with a user selection icon)
- Program Status:  (with a dropdown icon)
- Contains Project:  (with a dropdown icon)
- Business Objectives:  (with a dropdown icon)
- Created By:  (with a user selection icon)
- Relative Priority From:  To:
- Creation Date From:  To:  (with calendar icons)
- Sort By: Program Name (dropdown), Ascending (radio button), Descending (radio button)
- Results Displayed Per Page: 50 (input field)

A 'Search' button is located at the bottom right of the search form.

- Under **Select a Program to View**, in the **Program Name** column, click a program name.

The program is displayed on the View Program page.

The screenshot shows the Mercury IT Governance Center interface. The page title is "View Program IT Hardware Upgrade". At the top, there are navigation tabs: "Modify Program", "Program Settings", and "Configure Access", along with a "Done" button. The program details are as follows:

- Program Status:** Active
- Program Managers:** Adam Dubrow
- Relative Priority:** 1
- Description:** Upgrade the IT hardware.
- Benefit:** Better, stronger, faster hardware.
- Status Notes:** Just starting.

Below the details is a "Program Budget" section indicating "(no associated budget)".

The "Program Details" section includes a "Projects" table:

Project Name	% Complete	Project State	Sched	Sched	Project
kde_new_project	100%	In Planning	11/17/05	11/17/05	Admin User

There are three charts showing the distribution of issues, scope changes, and risks:

- Issues (Program and Project Level) - Total = 3:** A bar chart showing 1 issue at each of the four priority levels: Critical, High, Normal, and Low.
- Scope Changes (Level 1 and 2) - Total = 1:** A bar chart showing 1 scope change at the High severity level, and 0 at Critical, Medium, and Low.
- Risks - Total = 3:** A bar chart showing 2 risks at the High probability level, 1 risk at the Medium probability level, and 0 risks at the Low probability level. A legend indicates that green bars represent Impact: Level 1.

The "Business Objectives" section contains a table:

Name	State	Owner	Priority	Description
Test#1	In Progress			
dbranchen testing	In Progress	Antonio Jimenez		testing new business objectives

The "Notes" section shows a note from "Admin User (admin)" dated "November 15, 2005 7:15:51 AM PST" with the content "test".

The "References" section includes a "Requests" table:

Req #	Assigned User	Description	Request Type	Status	% Complete	Relationship	Relationship Details
30360		bug test	Bug	New	0%	Related to this Program	Informational. The Request is related to the referenced P...

At the bottom, there is a note: "Highlighted items are actively controlling this Program".

## **Modifying General Program Information**

You can use the Edit Program page to update general program information such as budget information, notes, references, and assignments.

To modify general program information:

1. Log on to Mercury IT Governance Center.
2. Search for and select the program (see *Searching for and Viewing Programs* on page 35).

The View Program page opens.

3. Near the top of the page, click **Modify Program**.

The Edit Program page opens.

Dashboard - Front Page > Search Programs > View Program > Edit Program

Modify Program: Enterprise Business Apps Save Done Cancel

**Program Name:** Enterprise Business Apps

**Program Status:** Active

**Program Managers:** Carolyn Sayer

**Description:**  
Establish, Maintain and Improve enterprise business application selection, delivery and maintenance in order to ensure seamless business operations with a high degree of availability, efficiency and business value. This includes our back office OraApps ERP system, Hyperion for global consolidations and financial reporting and minimal data warehousing, as well as sales interfaces. Sales-specific tools are not included.

**Benefit:**  
Increased efficiency, global processes, data available for analysis.

**Status Notes:**  
Applications are in maintenance-mode except for OraApps ERP, which is undergoing an upgrade to the newest release to take advantage of some new CRM capabilities.

**Program Budget**

**Budget:** General Program Budget View

**Projects**

Project Name	% Complete	Project Status	Sched Start	Sched Finish	Project Manager
<input checked="" type="checkbox"/> <input type="checkbox"/> ERP Service Pack - Sept 2006	46%	Business Readiness S...	7/6/06	8/24/06	Joseph Banks
<input checked="" type="checkbox"/> <input type="checkbox"/> Ops: BackOffice Acceleration	5%	Requirements	7/3/06	10/10/06	Joseph Banks; Caroly...
<input checked="" type="checkbox"/> <input type="checkbox"/> ERP Upgrade	65%	In QA	4/3/06	11/20/06	Teju Krishna; Joseph ...
<input checked="" type="checkbox"/> <input type="checkbox"/> Internal Web Site Rollout - IT	0%	Deploy	1/16/06	3/6/06	Joseph Banks
<input checked="" type="checkbox"/> <input type="checkbox"/> Internal Web Site Rollout - sal...	0%	Assign Project Manager	6/1/06	7/20/06	Joseph Banks

Add Project

**Business Objectives**

Name	State	Owner	Priority	Description
<span>Add Business Objective</span>				

**Notes**

Add Note

**References**

**Requests**

Req #	Assigned User	Description	Request Type	Status	% Complete	Relationship	Relationship Details
30214	Leslie Franklin	Deploy to alpha test s...	Program Issue	Open	0%	Related to this Program (System)	Informational: The Request is related to the referenced P...
30215	Finn Gill	Coordinate pre-beta te...	Program Issue	New	0%	Related to this Program (System)	Informational: The Request is related to the referenced P...
30216	John Groom	Develop new migration ...	Program Issue	New	0%	Related to this Program (System)	Informational: The Request is related to the referenced P...

**Reference Additions**

**New Reference:** Attachment Add Highlighted items are actively controlling this Program

**References to be added on Save:**

Open Remove

Save Done Cancel

4. Make any necessary changes to field values.

5. To add one or more projects to the program:

a. In the **Projects** section, click **Add Project**.

A selection window opens.

b. In the **Project Name** column, select the name of one or more projects to add to the program.



Note

You can use the **Ctrl** and **Alt** keys to select several project names.

c. Click **OK**.

The **Projects** section now lists the selected projects.



Note

For information about how to create projects, see the *Mercury Project Management User's Guide*.

6. To associate a business objective with the program:

a. In the **Business Objective** section, click **Add Business Objective**.

A selection window opens and displays a list of business objectives.

b. Click the name of the business objective to associate with the program.

The selection window closes and the **Business Objective** section now lists the objective you selected.

c. To add more business objectives to the program, repeat [step 6](#).



Note

For information on how to create business objectives, see [Creating Business Objectives on page 20](#).

7. To add a note to the program:

a. In the **Notes** section, click **Add Notes**.

The Add Notes to Program window opens.

b. Click inside the text field.

c. Type the note contents, and then click **Add**.

The **Notes** section displays the note next to your user name and the date and time you created the note.



8. To add a reference to the program:
  - a. In the **References** section, in the **New Reference** list, select the type of reference to add to the program.
  - b. Click **Add**.

Which selection window opens next depends on the reference type you selected in the **New Reference** list. For a complete list of the reference types and the corresponding selection windows, see *Program References* on page 53.

The **References to be added on Save** section lists the selected reference.
  - c. To attach the listed reference to the program, on the Modify Program page, click **Save**.
  - d. To remove a reference from the program, to the left of the reference name, click the **Delete** icon.
9. To save the changes to the program and close the Modify Program page, click **Done**.

## Configuring Program Indicators

Program indicators let you see at a glance the status of program issues, scope changes, risks, and, if Financial Management is enabled for the program, cost data. These indicators are displayed as color-coded icons in the Program List portlet and on the View Program page.

Each request type that is visible from Program Management has its own health indicator, which you can configure independent of the other indicators. To configure these indicators, use the **Health Indicators** section of the Program Settings page. The following sections provide information about these health indicators.

### Project and Program Issues

Issues introduce a framework for identifying and resolving all project and program-related issues. Issues can span multiple request types to provide a finer level of visibility over the resolution process.

Issues logged directly against a program represent problems in the program itself. For example, a change in corporate direction may call for a reevaluation of program goals.

■ ■ Note

Issues submitted against projects can be escalated to the program level as necessary. Project issues that have not been escalated to the program level are not visible from Program Management.

If an issue logged against a project that is linked to a program cannot be resolved by the project manager, that issue must be made visible at the program level. For example, an issue might involve coordination among multiple projects.

■ ■ Note

Issue tracking is enabled by default in Program Management. To disable issue tracking, go to the **Program Issues** subsection of the Program Settings page, and then, next to the **Track issues for this program?** option, select **No**, and then click **Save**.

Issue health is based on the number of issues that are assigned a priority. Only open issues logged directly against the program, or escalated to the program level of a project within the program, are considered in calculating program issue health. The program manager can assign different weights to issues that are assigned different priorities. The program manager can also assign thresholds for the health status levels signified by yellow and red indicators.

For example, suppose that you have assigned weights to the issue priorities for the program as follows:

- Critical: 8
- High priority: 5
- Medium priority: 3
- Low priority: 1

Suppose your program has the following issues:

- 3 high priority issues
- 2 medium priority issues
- 6 low priority issues

The overall health value computed for these program issues is  $(3 \times 5 + 2 \times 3 + 6 \times 1)$ , or 27.

If the threshold value for the yellow health indicator is 20, and the threshold value for the red health indicator is 40, then the issue health indicator for this program is yellow.



Note

You can change the values (their names and how many are listed) displayed in the **Priority** list from the Validation Workbench. (To access the Validation Workbench, open the Workbench, and then, on the shortcut menu, select **Configuration > Validations**.)

The default indicator thresholds are:

- Red: 40
- Yellow: 20
- Green: all values below 20

The default weights assigned to program issue priorities are:

- Critical: 5
- High priority weight: 3
- Medium priority weight: 1
- Low priority weight: 0

## Program Risks

Risks provide a way to log and resolve threats to program success. The process of gathering information about possible risks (including their impact and probability of occurrence) is streamlined.

Risks logged against a project in a program must be visible at the program level so that they can be addressed in a coordinated way. In many organizations, the program manager focuses only on risks that are likely to occur.



Note

Risk tracking is enabled by default in Program Management. To disable issue tracking, go to the **Program Risk** subsection of the Program Settings page, and then, next to the **Track risks for this program?** option, select **No**, and then click **Save**.

Program risk health is based on the number of risks that fall into given risk levels and probabilities. Because you cannot directly log a risk against a program, only risks logged against the projects included in program are used in calculating program risk health.

The program manager can assign different weights to risks that have different impact levels and probabilities assigned to them. The program manager can also set threshold values for yellow and red health indicators.

Suppose, for example, that the weights assigned to risk impact and probability are as follows:

- Impact Level 1: 5
- Impact Level 2: 3
- Impact Level 3: 1
- Probability High: 5
- Probability Medium: 3
- Probability Low: 1

Three risks are logged against the program, as follows:

- Risk #1 and 2: Impact Level = 1, Probability = High
- Risk #2: Impact Level = 2, Probability = Low
- Risk#3: Impact Level = 3, Probability = High

The overall computed health contribution of each risk is computed by multiplying the weights based for its impact level and probability. In this case, the computed risk health value is  $(5 \times 5 + 3 \times 1 + 1 \times 5)$ , or 33. If the yellow health threshold is 20, and the red health threshold is 30, then the risk health for this program has a red health indicator.

The default indicator thresholds are:

- Red: 40
- Yellow: 20
- Green: All values below 20

## Program Scope Changes

Scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. Scope changes logged against projects in the program must be visible at the program level if they are large or require focused attention for other reasons.

Submitted scope change requests can be assessed and then rejected or incorporated into program or project scope. Program and project scope can be controlled by ensuring that potential changes are clearly identified, aligned, and processed.



Note

Scope change request tracking is enabled by default in Program Management. To disable scope change request tracking, go to the **Program Scope Changes** subsection of the Program Settings page, and then, next to the **Track scope changes for this program?** option, select **No**, and then click **Save**.

Scope change health is based on the number of scope changes that fall into a given severity. Only open scope changes logged against a project in the program are used in computing scope change health.

The program manager can assign different weights to scope changes of different severities. The program manager can also set threshold values for the yellow and red health indicators.

Suppose, for example, that the assigned weights of scope change severity for a program are:

- Critical severity: 5
- High severity: 3
- Medium severity: 1
- Low severity: 0

Suppose too that the program has the following scope changes:

- 3 critical scope changes
- 2 medium severity scope changes
- 6 low severity scope changes

Then, the overall computed health value for issues is  $(3 \times 5 + 2 \times 1 + 6 \times 0)$ , or 17. If the yellow health threshold is set to 20, the red health indicator threshold is set to 40, then the program scope change health is displayed with the yellow indicator.

Default threshold values for program scope change health indicators are:

- Red: 40
- Yellow: 20
- Green: all values below 20

The default weights assigned to program scope change severities are

- Critical: 8
- High: 5
- Medium: 3
- Low: 1



Note

Issues, risks, and scope changes are modeled after the Project Management Institute's *A Guide to the Project Management Body of Knowledge*.

## Financial Management

Mercury Financial Management™ capabilities let you track planning-related cost data in the form of budgets. You can view financial information for the projects included in a program if the projects are configured to track this information, and if you enable Financial Management for the program.

This includes overall cost information for the active baseline, plan and actuals, with breakdown based on labor versus non-labor, and capital expenses versus operating expenses. You can capture cost data during project plan execution, and then compare this cost data to financial data recorded in project or program budgets.

You can use the following indexes to compare cost data across the projects in the program:

- **Cost Performance Index (CPI).** The CPI represents the cost efficiency ratio of earned value (EV) to actual cost (AC). It is used to predict the size of possible cost overrun.
- **Schedule Performance Index (SPI).** The SPI is the schedule efficiency ratio of EV accomplished against planned value (PV). It indicates what portion of the planned schedule was actually accomplished. The SPI is calculated by dividing earned value by planned value ( $SPI = EV / PV$ ).

Figure 4-1. Program Settings page

MERCURY
SIGN OUT

IT Governance Center View Program > Prioritize Programs > Search Programs > View Program > Program Creation: Adjust Program Settings

[Help With Create Program Settings](#)

### Program Settings for IT Hardware Upgrade

---

**Financial Management Settings**

Enabling Financial Management will allow you to view financial information and Earned Value Analysis for this Program. Disabling Financial Management will block configuration of other Program Financial Settings. Budget will still be available.

 **Enable Financial Management for this Program**

---

**Health Indicators**

Program Issues

**Track issues for this program ?**  Yes  No

The Issue Health of the program is determined by adding up the weights of all of the program's issues. Below you can specify the weight for the issue, based on its priority.

Priority	Weight
Low	0
Normal	1
High	3
Critical	5

Health

The program's issue health is ■ when the weights of all open issues total at least:

The program's issue health is ■ when the weights of all open issues total at least:

---

**Program Risk**

**Track risks for this program ?**  Yes  No

The Risk Health of the program is determined by adding up the weights of all of the program's risk. Below you can specify the weight for the risk, based on its impact and probability.

Impact	Weight	Probability	Weight
Level 1	5	High [26-100%]	5
Level 2	3	Medium [11-25%]	3
Level 3	1	Low [0-10%]	1

Health

The program's risk health is ■ when the weights of all open risk total at least:

The program's risk health is ■ when the weights of all open risk total at least:

---

**Program Scope Changes**

**Track scope changes for this program ?**  Yes  No

The Scope Change Health of the program is determined by adding up the weights of all of the program's scope changes. Below you can specify the weight for the scope changes, based on its severity.

Severity	Weight
Critical	5
High	3
Medium	1
Low	0

Health

The program's scope change health is ■ when the weights of all open scope change total at least:

The program's scope change health is ■ when the weights of all open scope change total at least:

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## Modifying Program Indicator Settings

To modify the indicator settings for a program:

1. Log on to Mercury IT Governance Center.
2. Open a program for which you want to change the indicator settings.



Note

For information on how to find and open a program, see [Searching for and Viewing Programs](#) on page 35.

The View Program page displays the details for the selected program.

3. Click **Program Settings**.

The Program Settings page opens.

4. To enable Financial Management for this program, under **Financial Management Settings**, select the **Enable Financial Management for this Program** checkbox.
5. To enable and set the health indicators for program issues, in the **Program Issues** section, do the following.
  - a. To track program issues, next to **Track issues for this program?**, leave **Yes** selected.
  - b. To change the weight values for the program priorities, in the **Weight** fields, type new weight values for each priority. The default values are as follows:
    - Low = 0
    - Normal = 1
    - High = 3
    - Critical = 5

To calculate program health, Program Management add the weights of all open program issues. You can set threshold values to display the warning (yellow) and critical (red) indicators as the number and severity of issues reach levels that warrant attention.

- c. To change the program issue warning threshold value, under **Health**, next to the yellow indicator, enter a new value (the default is 20).



- d. To change the program issue critical threshold value, under **Health**, next to the red indicator, enter a new value (the default is 40).

Program risk health is determined by adding the weights of all open program risks. You can assign a relative weight to risks based on impact and probability.

6. To configure program risk indicators, in the **Program Risk** section, do the following:
  - a. To track program risks, next to **Track risks for this program?**, leave **Yes** selected.
  - b. To change the weight values for the impact levels, enter new numbers for each impact level. The impact levels have the following default values:
    - Level 1 = 5
    - Level 2 = 3
    - Level 3 = 1
  - c. To change the weight values for the probability values, enter new numbers for each probability. The probability values have the following default values:
    - High [26-100%] = 5
    - Medium [11-25%] = 3
    - Low [0-10%] = 1
  - d. To change the program risk warning value (yellow), under **Health**, enter a new number. (The default is 20.)
  - e. To change the program risk critical value (red), under **Health**, enter a new number. (The default is 40.)
7. To enable and set the health indicators for program scope changes, under **Program Scope Changes**, do the following:
  - a. To track program scope changes, next to **Track scope changes for this program?**, leave **Yes** selected.

- b. To change the weight values for the severity of the scope change, enter new numbers for each severity. The default values are:
    - Critical = 5
    - High = 3
    - Normal = 1
    - Low = 0
  - c. To change the program scope change warning value (yellow), enter a new number. (The default is 20.)
  - d. To change the program scope change critical value (red), enter a new number. (The default is 40.)
8. Click **Done**.

## Configuring Program Access

Organizations usually control access to some internal information and business processes, either to protect sensitive information, such as salaries, or to simplify business processes by hiding data that is of no interest to some users. Program Management includes two levels of data access:

- Program Access
- Cost Access

Program Access and Cost Access are configured on a program-by-program basis using the Configure Access page.

To edit or update access to a program:

1. Log on to Mercury IT Governance Center.
2. Open a program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

The View Program page displays the program information.

- At the top of the page, click **Configure Access**.

The Configure Access page opens.

The screenshot shows the Mercury IT Governance Center interface. At the top, there is a red header with the Mercury logo and a 'SIGN OUT' button. Below the header, the breadcrumb trail reads: 'View Program > Prioritize Programs > Search Programs > View Program > Configure Access'. A help link 'Help With Configure Program Security' is visible. The main content area is titled 'Configure Access for IT Hardware Upgrade' and includes 'Save', 'Done', and 'Cancel' buttons. The 'Program Access' section contains a note: 'In addition to Adam Dubrow, the Program Manager(s) of this Program, give view access to:' followed by radio button options: 'No One', 'All Project Managers of Projects in this Program', 'All other Program Managers' (which is selected), 'All Program Managers; and Project managers in this Program', and 'Only these Security Groups:'. Below these options is a 'Security Group' text box and an 'Add Security Group' button. A note states: 'Note: Only the Program Manager(s) of this Program can delete this Program.' The 'Cost Access' section follows a similar structure with radio button options: 'No One' (selected), 'All Project Managers of Projects in this Program', 'All other Program Managers', 'All Program Managers; and Project managers in this Program', and 'Only these Security Groups:'. It also includes a 'Security Group' text box and an 'Add Security Group' button. At the bottom right of the form, there are 'Save', 'Done', and 'Cancel' buttons.

- In the **Program Access** section, select one of the following to be given access to the program.

- **No One**
- **All Project Managers of Projects in this Program**
- **All other Program Managers**
- **All Program Managers; and Project managers in this Program**
- **Only these Security Groups:**



Note

Effectively, a program manager is any user who has the Edit Program (or Edit All Programs) access grant. If a user is an assigned program manager, but he does not have a required access grant, he cannot manage the program.

A user who has the Edit All Programs access grant already has full access to the program, even if, in the **Program Access** section, **No One** is selected.

- If you selected **Only these Security Groups**, do the following:
  - Under **Security Group**, click **Add Security Group**.

A selection window opens.

- b. To select a security group, click its name.

The selection window closes and the **Security Group** section lists the selected security group name.



To remove a listed security group from the Configure Access page, click the delete icon to the left of its name.

6. If Financial Management is enabled, in the **Cost Access** section, select one of the following to be given view access to the program cost data:
  - **No One**
  - **All Project Managers of Projects in this Program**
  - **All other Program Managers**
  - **All Program Managers; and Project managers in this Program**
  - **Only these Security Groups**



By default, the program manager has full access to the program.

7. If you select **Only these Security Groups**, then under **Security Group**, click **Add Security Group**, and then select a security group listed in the window.

The list window closes. The Security Group section now lists the selected security group name. To delete a listed security group, click the icon to the left of its name. To add another security group, click **Add Security Group** again.
8. Click **Done**.

## Program References

This section contains information about the types of references you can add to a program.

### Attachments as References

You can specify attachments as program references.

To reference an attachment:

1. Open a program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

2. At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

3. Scroll to the **References** section.

4. In the **New Reference** list, leave **Attachment** (the default) selected and click **Add**.

The Add Document window opens.

5. In the **File** field, enter the full path of the file to add as a reference.



Note

The attachment must be accessible from your workstation.

6. In the **Author** field, you can type the name of the person who authored the attachment.

7. In the **Description** field, you can type information about the attachment and why it is referenced.

8. Click **Add**.

The file you specified is uploaded. In the **References** section of the Modify Program page, the **References to be added on Save** field displays the file name.

9. Click **Save**.

## Existing Packages as References

You can reference existing packages to a program.

To reference an existing package:

1. From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

2. At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

3. Scroll to the **References** section.

4. In the **New Reference** list, select **Package (Existing)**.

5. Click **Add**.

The Add Reference: Package search window opens.

- Enter the search criteria, and then click **Search**.

Package Search Results

Pkg #	Workflow	Status	Priority	Assigned To	Pkg Lines	Description
<input type="checkbox"/> 30124	Test Alpha > Test Beta	New	Normal	jasmith	3	Copy of 30122
<input type="checkbox"/> 30123	Test Alpha > Test Beta	New	Normal	jasmith	3	Copy of 30122
<input type="checkbox"/> 30122	Test Alpha > Test Beta	In Progress	Normal	jasmith	3	Upgrade to patch 4.5.4.7
<input type="checkbox"/> 30121	Test Alpha > Test Beta	New	Normal	jasmith	3	ERP Patch v4.5.4.7 Migration Test
<input type="checkbox"/> 30079	Test Alpha > Test Beta	New	Low	jasmith	3	Copy of 30073
<input type="checkbox"/> 30073	Test Alpha > Test Beta	In Progress	Low	jasmith	3	Test package.

The Add Reference: Package window lists relationship types and displays the package(s) that match your search criteria.

- Select the type of relationship, the package or packages, and then click **Add**.

The **Reference to be added on Save** section lists the selected package.

- Click **Save**.

## New Packages as References

You can add a new package as a program reference.

To reference a new package:

- From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

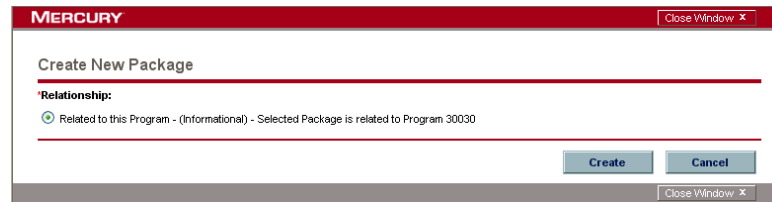
- At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

- Scroll to the **References** section.
- In the **New Reference** list, select **Package (New)**.

5. Click **Add**.

The Create New Package window opens.



6. Select the relationship, and then click **Create**.

The New Package window opens.

7. Enter the package information, and then click **Save**.

The **Reference to be added on Save** section lists the new package.

8. To attach the package to the program, click **Save**.

## Projects as References

To attach an existing project as a program reference:

1. From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

2. At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

3. Scroll to the **References** section.

4. In the **New Reference** list, select **Project**.



5. Click **Add**.

The Add Reference: Project window opens.

6. Locate and select one or more projects to add as program references.

	Project Name	Status	Project Manager	Project ID	Region	Project Type	Project Start (period)	Project Finish (period)
<input type="checkbox"/>	Execution Phase - Exposing Mainframe Account Data	Design	Joseph Banks	30127	MercuryUS	Small Project	June 2007	August 2007
<input type="checkbox"/>	Expose historical mainframe account information	Business Readiness Sign-Off	Joseph Banks	30124	MercuryUS	Small Project	January 2007	March 2007
<input type="checkbox"/>	Sample - Delete or remove or repurpose	Assign Project Manager	Admin User	30060	MercuryUS	Large Capital Projects	January 2007	January 2008

7. Click **Add**.
8. The **Reference to be added on Save** section lists the selected program(s).
9. To attach the project(s) to the program, click **Save**.

## Existing Requests as References

You can associate project risks, scope changes, and issues directly to a program without linking the associated project(s) to the program. Any such project requests that you attach as a program reference are visible in the corresponding sections of the View Program page (in the **Issues**, **Scope Changes**, and **Risks** bar graphs) and affect program health, even they are from projects that are not directly linked to the program.

To reference existing requests to programs.

1. From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

2. At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

3. Scroll to the **References** section.
4. In the **New Reference** list, select **Request (Existing)**.
5. Click **Add**.

The Add Reference: Request search window opens.

- Specify your search criteria, and then click **Search**.

Request Search Results

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
<input type="checkbox"/> 30332	PFM - Project		Assign Project Manager			John Smith
<input type="checkbox"/> 30331	PFM - Project		Assign Project Manager			John Smith
<input type="checkbox"/> 30210	PFM - Proposal		New			Jane Smith
<input type="checkbox"/> 30124	PFM - Proposal		New			Jane Smith
<input type="checkbox"/> 30123	PFM - Project		Design			Jane Smith
<input type="checkbox"/> 30122	PFM - Project		Assign Project Manager			Jane Smith
<input type="checkbox"/> 30121	PFM - Proposal		New			Jane Smith
<input type="checkbox"/> 30120	PFM - Project		Assign Project Manager			Jane Smith
<input type="checkbox"/> 30106	PFM - Proposal		New			Fred Bieko

The window lists the relationship types you can select to indicate how the requests you select are related to the program, and it displays the requests that match your search criteria.

- Select the relationship type and the requests to add as references.
- Click **Add**.

The **Reference to be added on Save** section lists the selected request(s).

- To attach the request(s) to the program, click **Save**.

## New Requests as References

To add a new request as a program reference:

- From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

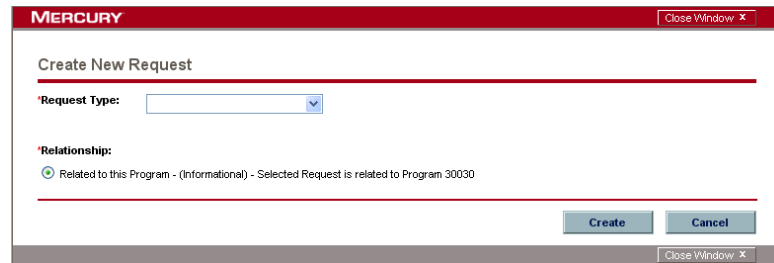
- At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

- Scroll to the **References** section.
- In the **New Reference** list, select **Request (New)**.

5. Click **Add**.

The Create New Request window opens.



6. In the **Request Type** list, select the request type.
7. Under **Relationship**, select the relationship option that indicates how the new referenced request is related to the program.
8. Click **Create**.

The Create New window opens.

9. Enter the information required to create the request.



Note

For complete details on how to create requests, see the *Mercury Demand Management User's Guide*.

The **Reference to be added on Save** section lists the new request.

10. To attach the new request to the program, click **Save**.

## Tasks as References

You can add existing tasks as program references.

To reference an existing task:

1. From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

2. At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

3. Scroll to the **References** section.

4. In the **New Reference** list, select **Task**.
5. Click **Add**.

The Add Reference: Task search window opens.

6. Enter your search criteria, and then click **Search**.

The window lists relationship types and lists the tasks that match your search criteria.

**MERCURY** Close Window X

Add Reference: Task

\*Select which relationship the selected Tasks will have to Program #30030:

Related to this Program - (Informational) - Selected Task is related to Program 30030

Task Search Results Showing 1 to 5 of 5

Task Name Δ	Project Path	Activity	Task State	Scheduled Start	Scheduled Finish	Resource	Department
<input type="checkbox"/> Actualize Potentials	Infrastructure Redevelopment > Initialize Development Cycle > Actualize Potentials	Realign Goals	In Progress	November 1, 2004	November 5, 2004	Brad Nolan	
<input type="checkbox"/> Adjust Upper Sales Band	CRM System 6.7 > PL Level 6 > Adjust Upper Sales Band	Realign Goals	Pending Pred...	November 16, 2004	November 18, 2004	Brad Nolan	
<input type="checkbox"/> Adjust Upper Sales Band	UIDM Deployment > PL Level 6 > Adjust Upper Sales Band	Realign Goals	Pending Pred...	November 18, 2004	November 22, 2004	Brad Nolan	
<input type="checkbox"/> PR Containment	VVCB Project 2 > Stabilize Market Pipeline > PR Containment	Retune CSD Core	In Progress	October 28, 2004	November 1, 2004	Brad Nolan	
<input type="checkbox"/> PR Containment	CDA System 3 > Stabilize Market Pipeline > PR Containment	Retune CSD Core	In Progress	November 15, 2004	November 17, 2004	Brad Nolan	

Check All Clear All Showing 1 to 5 of 5

Add Modify Search Cancel

Close Window X

7. At the top of the page, select the type of relationship task(s) are to have to the program.
  8. Click **Add**.
- The **Reference to be added on Save** section displays the referenced task(s).
9. To attach the reference to the program, click **Save**.

## URLs as References

You can reference an existing URL to a program.

To specify a URL as a program reference:

1. From the Dashboard, open the program.



Note

For information on how to search for and open a program, see [Searching for and Viewing Programs on page 35](#)

2. At the top of the View Program page, click **Modify Program**.

The Modify Program page opens.

3. Scroll to the **References** section.
4. In the **New Reference** list, select **URL**.
5. Click **Add**.


The Reference URL window opens.

A screenshot of a web application window titled "MERCURY". The window has a red header bar with the title "MERCURY" and a "Close Window" button. The main content area is titled "Reference URL" and contains two input fields: "URL:" and "Description:". The "URL:" field has a "View URL" button to its right. At the bottom of the window, there are "OK" and "Cancel" buttons. A "Close Window" button is also visible in the bottom right corner of the window frame.

6. In the **URL** field, type the URL.
7. In the **Description** field, you can enter information about the URL.
8. Click **OK**.

The **Reference to be added on Save** section displays the URL.

9. To attach the reference to the program, click **Save**.



**Chapter**  
**5**

**Managing Programs**

---

**In This Chapter:**

- *Overview of Managing Program Management*
  - *Managing Issues*
    - *Searching Program Issues*
    - *Searching for Project Issues*
    - *Analyzing Issue Activity*
    - *Analyzing Issue Resolution Time*
  - *Managing Risks*
    - *Searching for Risks*
    - *Analyzing Risk Activity*
    - *Analyzing Risk Resolution Time*
  - *Managing Scope Changes*
    - *Searching for Scope Changes*
    - *Analyzing Scope Change Activity*
    - *Analyzing Scope Change Resolution Time*
  - *Managing Program Processes*
    - *Managing Issue Processes*
    - *Managing Risk Processes*
    - *Managing Scope Change Processes*
-

## Overview of Managing Program Management

During the life of a program, much can happen. For example:

- Risks can develop.
- Program project scope can change.
- Issues may arise.
- Associated projects might finish, stall, or be canceled altogether.
- Business objectives can change or become obsolete.
- References may close out or otherwise change

For Program Management, these events are distilled into the following:

- Program and project issues
- Risks
- Scope Changes

This chapter provides information on how to manage your programs and the events that affect them.

## Managing Issues

Issues provide a means of identifying and resolving the concerns that surface during the life of a program in the form of requests that you can track and report on. You can file issues directly against a program, or escalate issues filed against the projects that are linked to the program. This allows project managers to work with project-level issues and escalate only those issues that require program-level attention.

This section provides information on how to track and analyze program and project issues in Program Management. For information on how to submit issues, see [Submitting Program Issues](#) on page 24.



## Searching Program Issues

To search for program issues:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Issues > Search Program Issues**.

The Search Requests page opens. **Program Issue** is selected in the **Request Type** list.

3. Enter the search criteria for the request, and then click **Search**.

The **Request Search Results** section lists the program issues that match your search criteria.

Dashboard - Front Page > Search Requests > Search Results

Export to Excel Modify Search

Save this search as:  Save Manage Saved Searches

Request Search Results Showing 1 - 5 of 5

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
<input type="checkbox"/> 30216	Program Issue	Develop new migration extension	New	John Groom	Normal	Admin User
<input type="checkbox"/> 30215	Program Issue	Coordinate pre-beta test effort	New	Finn Gill	High	Admin User
<input type="checkbox"/> 30214	Program Issue	Deploy to alpha test sites	Open	Leslie Franklin	Critical	Admin User
<input type="checkbox"/> 30213	Program Issue	Budget oversight	Open	Joseph Banks	High	Admin User
<input type="checkbox"/> 30212	Program Issue	Oversee IT revamp	New	Bridget Holbrook	Normal	Admin User

Showing 1 - 5 of 5

Check All Clear All Delete

Export to Excel Modify Search

4. In the **Req #** column, click an entry to open the corresponding program issue request.

The Program Issue page opens.

Dashboard - Front Page > Search Requests > Search Results > Request #30216

Printable Version Result 1 of 5

### Program Issue - #30216

Description: Develop new migration extension  
Request Status: New (View Full Status Below)

**Available Actions**

Review and Assign Issue

Assign Review On Hold Cancel

Make a Copy Delete

Expand All Collapse All Save

**Header**

**Summary**

Issue No.: 30216 Issue Status: New  
Created By: Admin User Created On: September 20, 2006  
Program: Enterprise Business Apps  
Priority: Normal Assigned To: John Groom  
Description: Develop new migration extension

**Details**

**Issue Details**

Date Identified: August 1, 2006 Due Date: September 29, 2006  
Issue Type: Technical

Detailed Description:  
Proposed Solution:  
Business Function:

Notes: No Notes Exist  
Status:  
References: 1 Reference Exists

Make a Copy Delete

5. Make any necessary changes to fields on the Program Issue page, and then click **Save**.

## Searching for Project Issues

To search for project issues:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Issues > Search Project Issues**.

The Search Requests page opens. Note that **Project Issue** is already selected in the **Request Type** list.

3. Enter your search criteria for the request, and then click **Search**.

The **Request Search Results** section lists the project issues that match your search criteria.

Search Requests > Search Results > Request #30216 > Search Requests > Search Results

[Export to Excel](#) [Modify Search](#)

Save this search as:  [Save](#) [Manage Saved Searches](#)

Request Search Results							Showing 1 - 6 of 6
Req #	Request Type	Description	Status	Assigned To	Priority	Created By	
<input type="checkbox"/> 30218	Project Issue	Usability testing	New	Bridget Holbrook	Normal	Admin User	
<input type="checkbox"/> 30217	Project Issue	Rewrite and distribute specifications	New	Barbara Getty	Normal	Admin User	
<input type="checkbox"/> 30151	Project Issue	We need another cube for contractors expected next month	New		Normal	Joseph Banks	
<input type="checkbox"/> 30150	Project Issue	Company shutdown directly impacts delivery timeline	New		Critical	Joseph Banks	
<input type="checkbox"/> 30063	Project Issue	New requirements for Order Processing introduced during testing	New		Critical	Admin User	
<input type="checkbox"/> 30030	Project Issue	Losing our Oracle Apps expert QA person	Open	Joseph Banks	Critical	Joseph Banks	

[Check All](#) [Clear All](#) [Delete](#) Showing 1 - 6 of 6

[Export to Excel](#) [Modify Search](#)

4. To open a listed project issue, in the **Req #** column, click its request number.

The Project Issue page opens.

Request #30150 > Dashboard - Front Page > Search Requests > Search Results > Request #30063

Printable Version Result 5 of 6

### Project Issue - #30063

Description: New requirements for Order Processing introduced during testing

Request Status: New ([View Full Status Below](#))

**Available Actions**

**Review and Assign Issue (Step Timeout, override with actions below)**

[Assign](#) [Review](#) [On Hold](#) [Cancel](#)

[Make a Copy](#) [Delete](#)

---

[Expand All](#) [Collapse All](#) [Save](#)

**Header**

**Summary**

Issue No.: 30063      Issue Status: New

Created By: Admin User      Created On: July 30, 2006      Assigned To:

Project: ERP Upgrade

Priority: Critical      Escalation Level: Program

Description: New requirements for Order Processing introduced during testing

---

**Details**

**Issue Details**

Date Identified: July 24, 2006      Due Date: August 1, 2006

Issue Type: Business Function

Detailed Description: During testing, our business partners started identifying as bugs several things that were known and agreed to be out of scope, as showstopper issues. This includes an automatic decomposition of revenue for staggered recognition as well as re-combining piece parts into different configurations outside of OraApps VMP or PTO functionality. We do not have

Proposed Solution: None, as I think this would destabilize the upgrade.

Business Function:

---

**Notes**      No Notes Exist

**Status**

**References**      1 Reference Exists

[Make a Copy](#) [Delete](#) [Save](#)

5. Make any necessary changes, and then click **Save**.

## Analyzing Issue Activity

Program Management can display an issue activity graph that lets you see how many issues were created and how many resolved each month (or week) during a time range that you specify.

To view issue activity:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Issues > Analyze Issue Activity**.

The Issue Activity: Creation and Resolution over Time page opens.

3. In the **Filter By** section, enter the following information:
  - a. In the **Program Name** field, enter the name of the program for which you want to view issue resolution information.
  - b. In the **Projects** field, you can enter the names of the projects linked to the selected program for which you want to view issues (escalated) information.



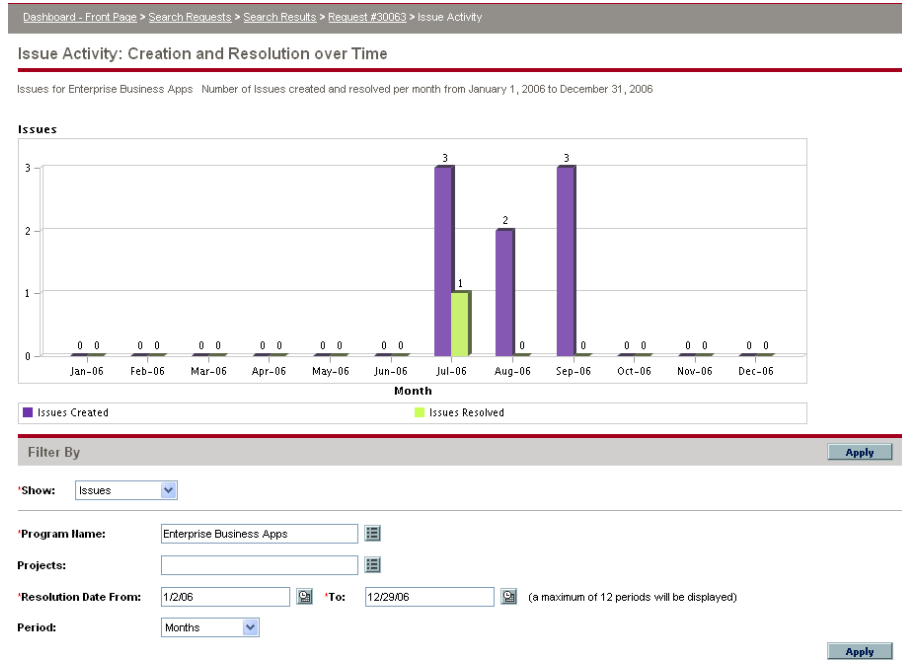
Note

If you leave the **Projects** field empty, Program Management displays issue resolution time information for issues escalated to program level from all projects linked to the program.

- c. Use the **Resolution Date From** and **To** fields to specify the date range for which you want to view issue resolution information.
- d. In the **Period** list, you can select either **Monthly** (the default selection) or **Weekly** to specify the time increments used to display the resolution time information.

4. Click **Apply**.

The Issue Activity: Creation and Resolution over Time page displays the results.



This page displays a graph that depicts the created and resolved program issues and project issues that were escalated to the program level for the program and date range you specified.

## Analyzing Issue Resolution Time

Program Management provides graphs that let you see how quickly submitted issues (both program issues and project issues escalated to the program level) are getting resolved.

To analyze issue resolution time:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Issues > Analyze Issue Resolution Time**.

The Issue Resolution: Average Resolution Time page opens.

3. In the **Filter By** section, enter the following information:
  - a. In the **Program Name** field, enter the name of the program for which you want to view issue resolution information.
  - b. In the **Projects** field, enter the names of the projects linked to the selected program for which you want to view issues (escalated) information.



If you leave the **Projects** field empty, Program Management displays issue resolution time information for issues escalated to program level from all projects linked to the program.

- c. Use the **Resolution Date From** and **To** fields to specify the date range for which you want to view issue resolution information.
  - d. In the **Period** list, you can select either **Monthly** (the default selection) or **Weekly** to specify the time increments used to display the resolution time information.
4. Click **Apply**.

Program Management displays a graph that depicts the average (mean) number of days required to resolve the issues that were resolved during the time period you specified. These include program issues and project issues that were escalated to the program level.

## Managing Risks

Project risks provide a means to identify risks and resolve them in the form of requests that you can track and report on. Although users can only file a risk against a project, you can escalate the risk so that it is visible from the program(s) to which the project is linked.

This section provides information on how to search for project risks, and view risk activity and risk resolution. For information on how to submit a risk request, see [Submitting Project Risks](#) on page 27.

## Searching for Risks

To search for project risks:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Risks > Search Risks**.

The Search Requests page opens. Under **Search for Requests to Review**, **Project Risk** is selected in the **Request Type** field.

3. In the **Search for Requests to View** section, enter the search criteria for the request.
4. To configure the display of the search results, in the **Choose Columns** section, move items between the **Available Columns** and **Selected Columns** fields.
5. Click **Search**.

The **Request Search Results** section lists the project risk records that match the search criteria.

The screenshot displays the 'Request Search Results' section of the Mercury IT Governance Center. The page header includes 'MERCURY' and 'IT Governance Center'. The breadcrumb trail is 'Search Results > Request #30412 > Issue Resolution > Request Search > Search Results'. There are buttons for 'Export Data to Excel' and 'Modify Search'. Below the search criteria, there is a 'Save this search as:' field and a 'Save' button. The main content is a table with the following data:

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30431	Project Risk	risk	New	Adam Dubrow		Admin User
30410	Project Risk	testing	New		Critical	Admin User
30409	Project Risk	testing program	New	dave branchen	Critical	Admin User
30403	Project Risk	issue 1	Open	dave branchen	Low	Admin User
30366	Project Risk	test2	New		High	Admin User

At the bottom of the table, there are buttons for 'Check All', 'Clear All', and 'Delete'. The page footer shows 'Showing 1 - 5 of 6' and navigation buttons for 'Prev' and 'Next'.



- To open a project risk request, in the **Req #** column, click the corresponding request number.

The Project Risk page opens.

Search Results > Request #30065 > Search Requests > Search Results > Request #30064

[Printable Version](#) Result 2 of 2

### Project Risk - #30064

Description: Resource drain due to KTLO activities

Request Status: New ([View Full Status Below](#))

**Available Actions**

**Project Lead Review and Assign (Step Timeout, override with actions below)**

[Assign](#) [Review](#) [On Hold](#) [Cancel](#)

**PMO Lead Review and Assign (Step Timeout, override with actions below)**

[Assign](#) [Review](#) [On Hold](#) [Cancel](#)

[Make a Copy](#) [Delete](#)

---

[Expand All](#) [Collapse All](#) [Save](#)

**Header**

**Summary**

**Risk No.:** 30064      **Risk Status:** New

**Created By:** Admin User      **Created On:** July 30, 2006      **Assigned To:**

**Project:**

**Priority:**       **Risk Impact Level:**       **Probability:**

**Description:**

**Details**

**Risk Details**

**Risk Type:**       **Date Identified:**

**Detailed Description:**

**Closure Criteria:**

**Action Plan:**

**Notes:** No Notes Exist

**Status:**

**References:** 1 Reference Exists

[Make a Copy](#) [Delete](#) [Save](#)

- Make any necessary changes to the project risk request, and then click **Save**.

## Analyzing Risk Activity

To analyze risk activity for projects linked to a program and escalated to program-level visibility:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Risks > Analyze Risk Activity**.

The Risk Activity: Creation and Resolution over Time page opens. In the **Show** list, **Risks** is selected.

3. Enter the following information:
  - a. In the **Program Name** field, enter the name of the program for which you want to view risk activity.
  - b. In the **Projects** field, enter the names of the projects linked to the selected program for which you want to view risk (escalated) activity.



Note

If you leave the **Projects** field empty, Program Management displays activity information on risks that have a risk impact level of 1 and 2 for all projects linked to the program.

- c. Use the **Resolution Date From** and **To** fields to specify the date range for which you want to view risk activity.
  - d. In the **Period** list, you can select either **Monthly** (the default selection) or **Weekly** to specify the time increments used to display the results.
4. Click **Apply**.

Program Management displays a graph that depicts the number of risks created and resolved for the program and time range you specified.

5. To change the information displayed in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

## Analyzing Risk Resolution Time

You can use Program Management to see how quickly the project risks associated with your programs are getting resolved.

To analyze resolution time for project risks associated with a program:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Risks > Analyze Risk Resolution Time**.

The Risk Resolution: Average Resolution Time page opens.

3. In the **Filter By** section, enter the following:
  - a. In the **Program Name** field, enter the name of the program for which you want to view risk resolution times.
  - b. In the **Projects** field, enter the names of the projects linked to the selected program for which you want to view risk resolution information.



Note

If you leave the **Projects** field empty, Program Management displays resolution information on risks with a risk impact level of 1 or 2 for all projects linked to the program.

- c. Use the **Resolution Date From** and **To** fields to specify the date range for which you want to view risk resolution information.
  - d. In the **Period** list, you can select either **Monthly** (the default selection) or **Weekly** to specify the time increments used to display the results.
4. Click **Apply**.

The Risk Resolution: Average Resolution Time page displays a graph that depicts the mean number of days required to resolve risks during the date range you specified.

5. To change the view in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

## Managing Scope Changes

During the life of a project, events that change the scope of a project can occur. Changed project scope affect the scope of any programs with which the project is associated. You can view these changes, process them, and make decisions based on the changes through project scope change requests. You can view and monitor these scope change requests through Program Management.

### Searching for Scope Changes

To search for a project scope change:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Scope Changes > Search Scope Changes**.

The Search Requests page opens. The **Request Type** list field displays the value **Project Scope Change Request**.

3. In the **Search for Requests to View** section, enter your search criteria.
4. To configure the display of the search results, in the **Choose Columns** section, move items between the **Available Columns** and **Selected Columns** fields.
5. Click **Search**.



Note

To list all project scope change requests, click **Search** without specifying search criteria.

The **Request Search Results** section lists project scope change requests that match your search criteria.

**MERCURY** IT Governance Center SIGN OUT

Search Results > Request #30403 > Risk Resolution > Request Search > Search Results

Export Data to Excel Modify Search

Save this search as:  Save Manage Saved Searches

**Request Search Results** Showing 1 - 5 of 5

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30411	Project Scope Change Request	pppppp	New			Admin User
30404	Project Scope Change Request	issue 1	New		Normal	Admin User
30377	Project Scope Change Request	opoopooo	New			Admin User
30368	Project Scope Change Request	test2	New		Critical	Admin User
30367	Project Scope Change Request	test1	New		Normal	Admin User

Check All Clear All Delete Showing 1 - 5 of 5

Export Data to Excel Modify Search

- To open a listed project scope change request, in the **Req #** column click the request number.

The Project Scope Change Request page opens.

**MERCURY** IT Governance Center SIGN OUT

Request #30403 > Risk Resolution > Request Search > Search Results > Request #30404

Printable Version Result 2 of 5

**Project Scope Change Request - #30404**

Description: issue 1 Most Recent Note: ([View Notes Below](#))

Request Status: New ([View Full Status Below](#))

**Available Actions**

Identify and Document CR

Complete

Make a Copy Delete

Expand All Collapse All Save

**Header**

**Summary**

Scope Change No.: 30404 Scope Change Status: New

Created By: Admin User Created On: November 15, 2005 Assigned To:

Project: sm - 2

Priority: Normal CR Level: Level 1 Business Impact Severity: Critical

Description: issue 1

**Details**

Scope Change Details

Notes

Status

References 1 Reference Exists

Make a Copy Delete Save

- Make any necessary changes, and then click **Save**.

## Analyzing Scope Change Activity

To analyze project scope change activity:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Scope Changes > Analyze Scope Change Activity**.

The Scope Change Activity: Creation and Resolution over Time page opens.

3. In the **Filter By** section, enter the following:
  - a. In the **Program Name** field, enter the name of the program for which you want to view project scope change request activity.
  - b. In the **Projects** field, enter the names of the projects linked to the selected program for which you want to the information.

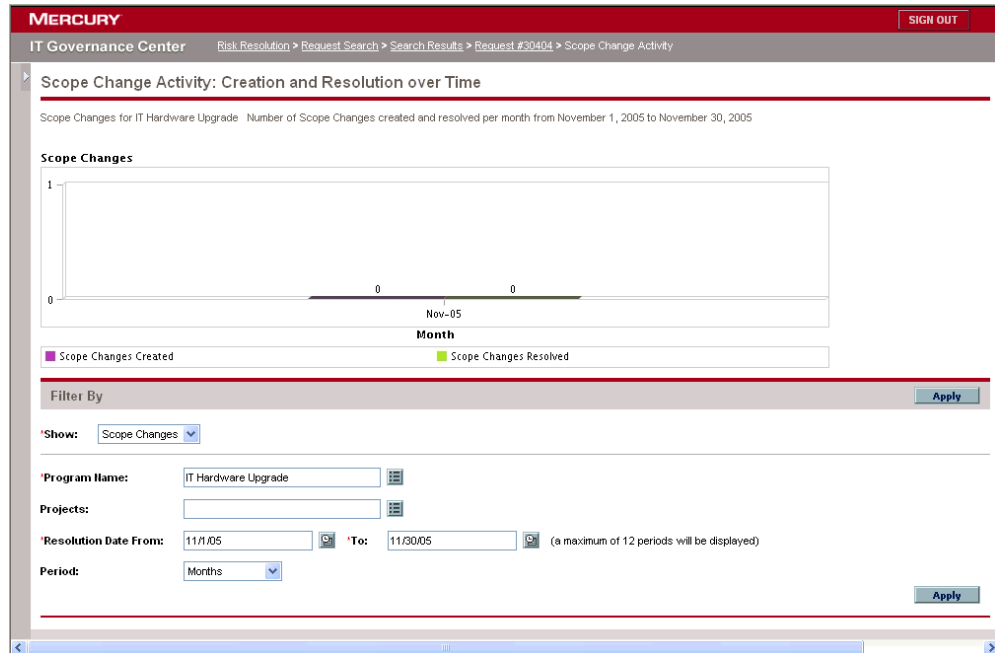


Note

If you leave the **Projects** field empty, Program Management displays activity information for all scope change requests for all projects linked to the program.

- c. Use the **Resolution Date From** and **To** fields to specify the date range for which you want to view activity information.
  - d. In the **Period** list, you can select either **Monthly** (the default selection) or **Weekly** to specify the time increments used to display the results.
4. Click **Apply**.

Program Management displays a graph that depicts the number of project scope changes created and resolved per month (or week) during the time period you specified.



- To change the view in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

## Analyzing Scope Change Resolution Time

You can use Program Management to see how quickly the project scope change requests associated with your programs are getting resolved

To view project scope change resolution times:

- Log on to Mercury IT Governance Center.
- From the menu bar, select **Program Management > Scope Changes > Analyze Scope Change Resolution Time**.

The Scope Change Resolution: Average Resolution Time page opens.

- In the **Filter By** section, enter the following:
  - In the **Program Name** field, enter the name of the program for which you want to view project scope change request resolution times.

- b. In the **Projects** field, enter the names of the projects linked to the selected program for which you want to the information.



If you leave the **Projects** field empty, Program Management displays resolution times for all scope change requests for all projects linked to the program.

- c. Use the **Resolution Date From** and **To** fields to specify the date range for which you want to view average resolution times.
  - d. In the **Period** list, you can select either **Monthly** (the default selection) or **Weekly** to specify the time increments used to display the results.
4. Click **Apply**.

Program Management displays a graph that depicts the mean number of days required to resolve project scope changes for the specified program and time period.

5. To change the data shown in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

## Managing Program Processes

Managing the program process means making changes to the workflow associated with the program issue, risk, or scope change request type. Changing the program process for one program changes the process for all programs. This can cause problems, especially if a workflow is currently used by a request type.

## Managing Issue Processes

You can use the Mercury IT Governance Workbench to manage the process that is applied to escalated project issues and program issues.

To manage the program issue process:

1. Log on to Mercury IT Governance Center.



2. From the menu bar, select **Administration > Program Processes > Manage Issue Process**.

The Workflow Step Sources, Workflow Workbench, and Workflow: Issue Management Process windows open.

3. Use the tabs in the Workflow: Issue Management Process window to make any necessary changes to the program issue workflow, layout, allowed request types, and security.
4. Click **OK**.

## Managing Risk Processes

To manage the process applied to risks submitted against projects linked to programs:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Program Processes > Manage Risk Process**.

The Workflow Step Sources, Workflow Workbench and Workflow: Risk Management Process windows open.

3. Use the tabs in the Workflow: Risk Management Process window to make any necessary changes to the workflow, workflow steps, layout, allowed request types, and security.
4. Click **OK**.
5. Close the Workbench.

## Managing Scope Change Processes

You can use the Mercury IT Governance Workbench to manage the process applied to project scope change requests.

To manage the program scope change process:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Program Processes > Manage Scope Change Process**.

The Workflow Step Sources, Workflow Workbench, and Workflow: Scope Change Request Process windows open.

3. In the Workflow: Scope Change Request Process window, make any necessary changes to the workflow, workflow steps, layout, allowed request types, and security.
4. Click **OK**.



**Chapter**  
**6**  
**Program Manager Page**

---

**In This Chapter:**

- *Overview of the Program Manager Page*
  - *Adding the Program Manager Page to the Dashboard*
  - *Portlets on the Program Manager Page*
    - *Program List Portlet*
    - *Program Project List Portlet*
    - *Issue List Portlet*
    - *Program Scope Change List Portlet*
    - *Program Risk List Portlet*
    - *Program Cost Summary Portlet*
  - *Customizing Portlets*
-

# Overview of the Program Manager Page

Program Management comes with a preconfigured Program Manager page. The Program Manager page can display one or multiple programs, depending on how you configure the portlets on the page. You can also configure multiple Program Manager pages to view multiple programs. *Figure 6-1* shows the Program Manager page.

Figure 6-1. Program Manager page

Dashboard Page: Program Manager Switch to page... Personalize

Page last refreshed: Sep 20, 2006 01:26:33 PM PDT Export to PDF

**Program List**

Program Name	Relative Priority	Program Manager	Program State	Issues	Risks	Scope Changes
Enterprise Business Apps		Carolyn Sayer	Active	5	2	1
Major Infrastructure Activities		Carolyn Sayer	New	5	3	1

Showing 1 to 2 of 2 [Prev](#) [Next](#) [Maximize](#)

**Program Project List**

Project Name Δ	Project Manager	Project No
<input type="checkbox"/> Change Actualizat...	azumwalt	30210
<input checked="" type="checkbox"/> ERP Upgrade	jbanks;tkrishna	30018
<input type="checkbox"/> IT: Defect proces...	jbanks;tkrishna	30125
<input type="checkbox"/> Internal Web Site...	jbanks	30016
<input type="checkbox"/> Internal Web Site...	jbanks	30015

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**Issue List**

Project Δ	Issue #	Priority	Escalation Level	Status	Description
ERP Upgrade	30062	Normal	Project	Closed	development servers have not arrived and developers need ...
ERP Upgrade	30150	Critical	Project	New	Company shutdown directly impacts delivery timeline
ERP Upgrade	30151	Normal	Project	New	We need another cube for contractors expected next month

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**Program Scope Change List**

Project Δ	Scope Change #	Severity	Change Request Level	Status	Description
ERP Upgrade	30066	High	Level 1	New	Automate Revenue recognition deferral timing ba...

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**Program Risk List**

Project Δ	Risk #	Probability	Impact Level	Status	Description
ERP Upgrade	30064	Medium [11...	Level 1	New	Resource drain due to KTLO activities
ERP Upgrade	30065	Medium [11...	Level 1	New	Org change management for the project is signif...
IT: Defect p...	30221	Medium [11...	Level 2	New	All departments must submit complete requirements
Internal Web...	30219	Medium [11...	Level 2	Closed	Limited time to research archived data.

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## Adding the Program Manager Page to the Dashboard

To add the preconfigured Program Manager page to your Dashboard:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.

The Personalize Dashboard page opens.

3. Click **Add Pre-configured Pages**.

The Add Pre-configured Pages to Dashboard page opens.

4. In the **Page Name** list, select **Program Manager**.

The Program Manager page opens.

5. Customize the Program Manager page and portlets as required.
6. To save any changes to the page and add it to your Dashboard, click **Done**.

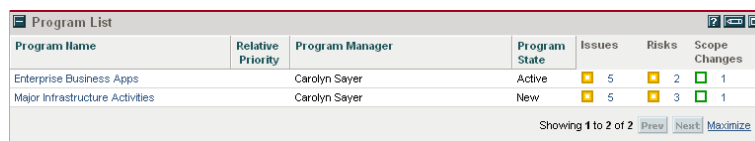
## Portlets on the Program Manager Page

This section provides description of the default portlets displayed on the Program Manager page. For information on how to personalize these portlets, see [Customizing Portlets on page 89](#).

### Program List Portlet

The Program List portlet ([Figure 6-2](#)) provides a high-level summary of the details for all programs in your system. It displays such general information as program priority, status and associated issues. You can personalize this portlet so that it filters records based on program name or on a project-related criterion and so that users can focus on just the data relevant to them.

*Figure 6-2. Program List portlet*



Program Name	Relative Priority	Program Manager	Program State	Issues	Risks	Scope Changes
Enterprise Business Apps		Carolyn Sayer	Active	5	2	1
Major Infrastructure Activities		Carolyn Sayer	New	5	3	1

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Note

To view a listed program, click an item in the **Program Name** column.

To display descriptions of all the filter fields that you can configure for the Program List portlet, at the upper-right corner of the portlet, click the **Help** icon.

## Program Project List Portlet

The Program Project List portlet (*Figure 6-3*) provides a view into all the projects associated with a program and their respective health indicators. This portlet can have multiple instances for viewing different programs and their associated projects. You can select which projects the portlet displays based on a number of specified criteria, including project name, status, and health. Clicking an entry in the **Project Name** column drills down to the Project page.

*Figure 6-3. Program Project List portlet*

Project Name $\Delta$	Project Manager	Project ID
<input type="checkbox"/> Change Actualizat...	azumwalt	30210
<input checked="" type="checkbox"/> ERP Upgrade	jbanks;krishna	30018
<input type="checkbox"/> IT: Defect proces...	jbanks;krishna	30125
<input type="checkbox"/> Internal Web Site...	jbanks	30016
<input type="checkbox"/> Internal Web Site...	jbanks	30015

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To display descriptions of all the filter fields that you can configure for the Program Project List portlet, at the upper-right corner of the portlet, click the **Help** icon.

## Issue List Portlet

The Issue List portlet (*Figure 6-4 on page 87*) lists all the issues that are directly associated with a selected program. You can display multiple instances of this portlet on a page so that you can view several programs and their associated issues at the same time.

You can personalize the Issue List portlet to display issues based on specific criteria, including program status, priority, escalation level, and so on. You can view information about an individual project by clicking its listing in the **Project Name** column.

Figure 6-4. Issue List portlet

Project Δ	Issue #	Priority	Escalation Level	Status	Description
ERP Upgrade	30062	Normal	Project	Closed	development servers have not arrived and developers need ...
ERP Upgrade	30150	Critical	Project	New	Company shutdown directly impacts delivery timeline
ERP Upgrade	30151	Normal	Project	New	We need another cube for contractors expected next month

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To display descriptions of all the filter fields that you can configure for the Issue List portlet, at the upper-right corner of the portlet, click the **Help** icon.

## Program Scope Change List Portlet

The Program Scope Change List portlet lists all the scope changes associated with a given program (*Figure 6-5*). You can display multiple instances of this portlet on a single page so that you can see several programs and their associated scope changes at the same time.

You can customize the Program Scope Change List portlet to display scope changes based on status, severity, change request level, and so on. You can view information about an individual project by clicking its listing in the **Project Name** column.

Figure 6-5. Program Scope Change List portlet

Project Δ	Scope Change #	Severity	Change Request Level	Status	Description
kde_new_project	30368	Critical	Level 3	New	test2
kde_new_project	30367	High	Level 2	New	test1

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To display descriptions of all the filter fields that you can configure for the Program Scope Change List portlet, at the upper-right corner of the portlet, click the **Help** icon.

## Program Risk List Portlet

The Program Risk List portlet (*Figure 6-6 on page 88*) lists all of the risks associated with a selected program. You can display multiple instances of this portlet on a page so that you can see several programs and their associated risks at the same time.

You can personalize the Program Risk List portlet to display risks based on status, impact level, probability, and so on.

Clicking an entry in the **Project** column drills down to the Project page.

Figure 6-6. Program Risk List portlet

Project Δ	Risk #	Probability	Impact Level	Status	Description
kde_new_project	30431	Medium [11...	Level 1	New	risk
kde_new_project	30366	High [26-1...	Level 1	New	test2
kde_new_project	30365	High [26-1...	Level 1	New	test1

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To display descriptions of all the filter fields that you can configure for the Program Risk List portlet, at the upper-right corner of the portlet, click the **Help** icon.

## Program Cost Summary Portlet

The Program Cost Summary portlet (*Figure 6-7*) portlet displays an overview of program cost health based on rolled-up costs in the projects in the program. The displayed figures include breakdown of labor and non-labor costs, total expenses set against baseline, and planned versus actual costs.

The Program Cost Summary portlet has just one filter field, which is **Program Name**.

Figure 6-7. Program Cost Summary portlet

Costs from Program: IT Hardware Upgrade			
Cost Overview			
		Planned	Actual
<b>Capital</b>			
Labor		\$0	\$0
Non-Labor		\$0	\$0
<b>Total Charge</b>		<b>\$0</b>	<b>\$0</b>
<b>Operating</b>			
Labor		\$0	\$0
Non-Labor		\$0	\$0
<b>Total Charge</b>		<b>\$0</b>	<b>\$0</b>
<b>Program Total Charge</b>		<b>\$0</b>	<b>\$0</b>



## Customizing Portlets

You can change what data a portlet displays and, to some degree, how it displays the data.

To customize a portlet:

1. Log on to Mercury IT Governance Center.
2. Open the Dashboard page that displays the portlet you want to customize.
3. In the upper-right corner of the portlet, click the **Edit** icon.

The Edit Preferences page opens.

4. To change the portlet title displayed on the page:
  - a. At the top of the page, click **Change Title**.  
The Edit Portlet Title window opens.
  - b. In the **Title** field, select the current title, and then type the new title.
  - c. To save the title, click **Change**.
5. In the **Preferences** and **Choose Display Columns** sections, make any necessary changes.



Note

To see a description of the controls in the **Preferences** section, return to the portlet, and, in the upper-right corner, click the **Help** icon.

6. Click **Done**.

The portlet reflects your changes.

For more information about working with portlets, see the document *Configuring the Standard Interface*.



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