Mercury IT Governance Center™

Mercury Program Management User's Guide

Version: 7.0

MERCURY™

Mercury
379 North Whisman Road
Mountain View, CA 94043
http://www.mercury.com

If you have any comments or suggestions regarding this document, please send email to documentation@mercury.com.

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Table of Contents

List of Figures vii

Chapter 1: Getting Started with Mercury Program Management 9

- Introduction to Mercury Program Management 10
- Overview of Program Management 10
- Related Documents 13

Chapter 2: Creating Programs 15

- Overview of Creating Programs 16
- Creating Programs 16

Chapter 3: Business Objectives, Issues, Risks, and Scope Changes 19

- Overview of Business Objectives 20
  - Creating Business Objectives 20
  - Managing Business Objectives 21
    - Editing Business Objectives 21
    - Deleting Business Objectives 22
- Submitting Issues, Risks and Project Scope Changes 22
  - Submitting Program Issues 24
  - Submitting Project Issues 26
  - Submitting Project Risks 27
  - Submitting Project Scope Changes 30

Chapter 4: Viewing and Modifying Programs 33

- Overview of Modifying Programs 34
- Updating Program Priorities 34

Searching for and Viewing Programs 35
Modifying General Program Information 38
Configuring Program Indicators 41
Project and Program Issues 41
Program Risks 43
Program Scope Changes 44
Financial Management 46
Modifying Program Indicator Settings 48
Configuring Program Access 50
Program References 53
Attachments as References 53
Existing Packages as References 54
New Packages as References 55
Projects as References 56
Existing Requests as References 58
New Requests as References 59
Tasks as References 60
URLs as References 62

Chapter 5: Managing Programs 63
Overview of Managing Program Management 64
Managing Issues 64
Searching Program Issues 65
Searching for Project Issues 67
Analyzing Issue Activity 69
Analyzing Issue Resolution Time 70
Managing Risks 71
Searching for Risks 72
Analyzing Risk Activity 74
Analyzing Risk Resolution Time 75
Managing Scope Changes 76
Searching for Scope Changes 76
Analyzing Scope Change Activity 78
Analyzing Scope Change Resolution Time 79
Managing Program Processes 80
Managing Issue Processes 80
Managing Risk Processes 81
Managing Scope Change Processes 81

Chapter 6: Program Manager Page 83
Overview of the Program Manager Page 84
Adding the Program Manager Page to the Dashboard 85

Portlets on the Program Manager Page 85
Program List Portlet 85
Program Project List Portlet 86
Issue List Portlet 86
Program Scope Change List Portlet 87
Program Risk List Portlet 87
Program Cost Summary Portlet 88
Customizing Portlets 89

Index 91

List of Figures

Figure 1-1 Menu bar and Dashboard 12
Figure 4-1 Program Settings page 47
Figure 6-1 Program Manager page 84
Figure 6-2 Program List portlet 85
Figure 6-3 Program Project List portlet 86
Figure 6-4 Issue List portlet 87
Figure 6-5 Program Scope Change List portlet 87
Figure 6-6 Program Risk List portlet 88
Figure 6-7 Program Cost Summary portlet 88

Chapter

1

Getting Started with Mercury Program Management

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.

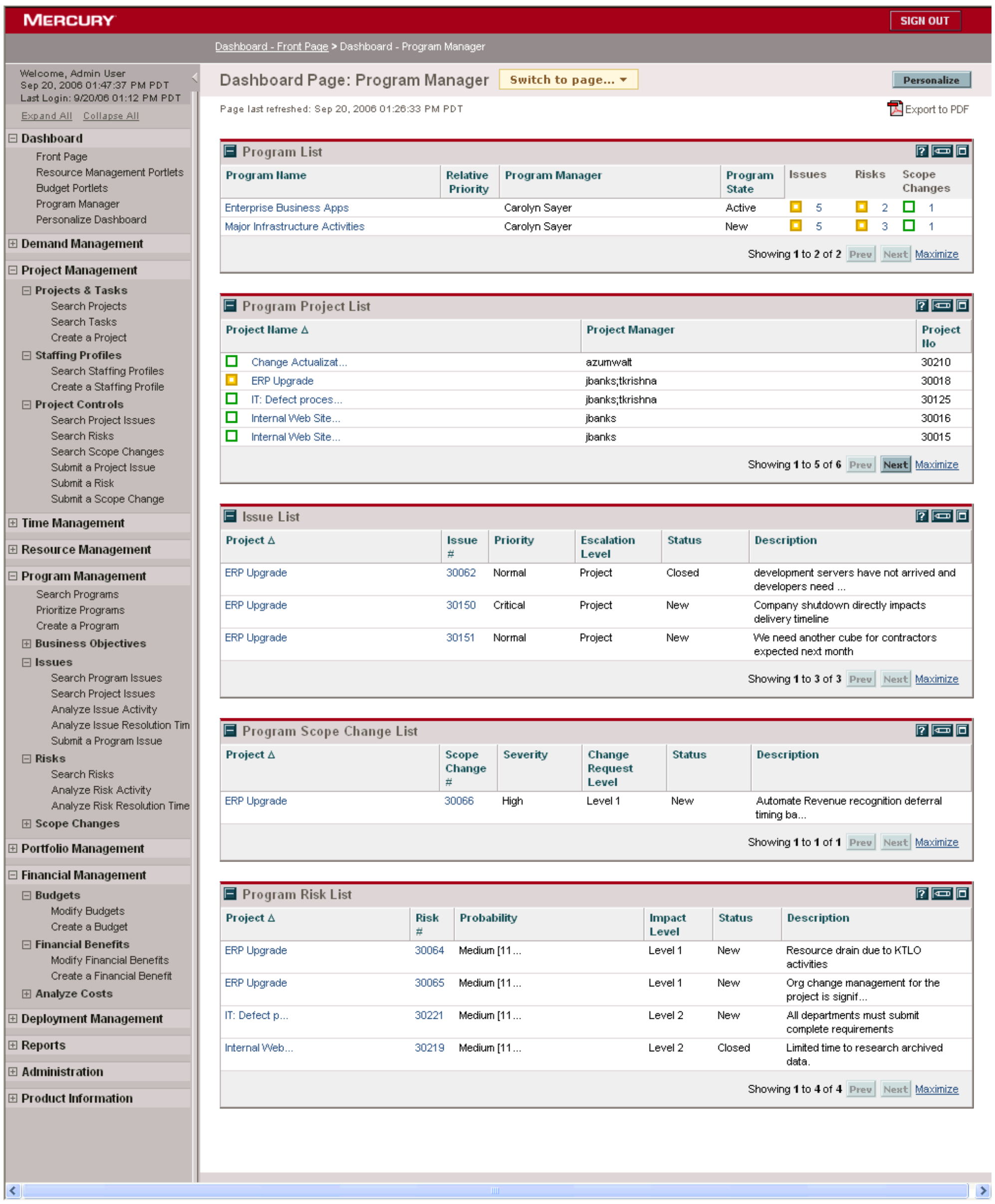
Note

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



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.

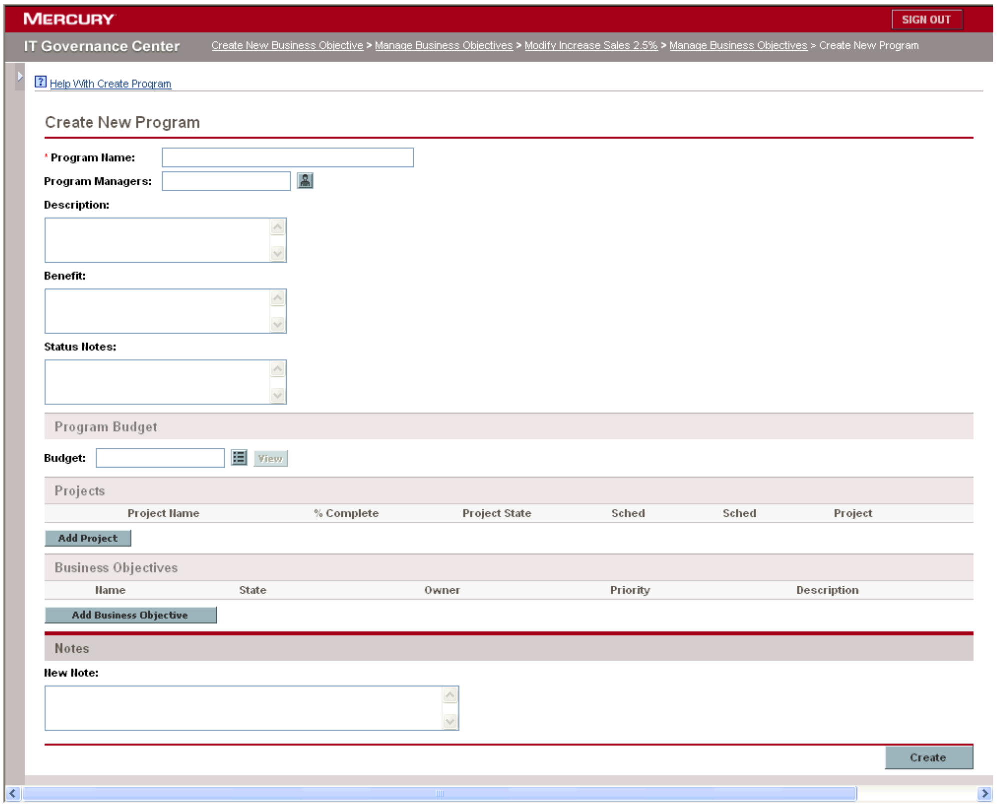
Creating Programs

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.



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.

Note

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.**

Chapter

3

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

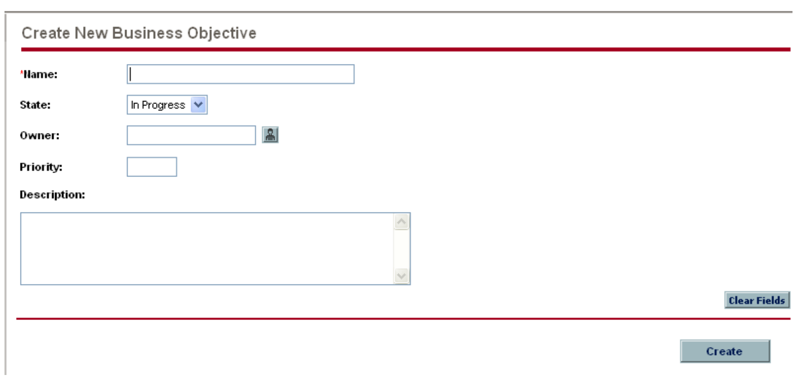
Business objectives provide a way for you to capture business goals as discrete entities that you can then prioritize and tie to other Mercury IT Governance Center entities, including programs. For example, XYZ Corporation creates the business objective "Reduce order to delivery time," assigns it a priority, 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.



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.

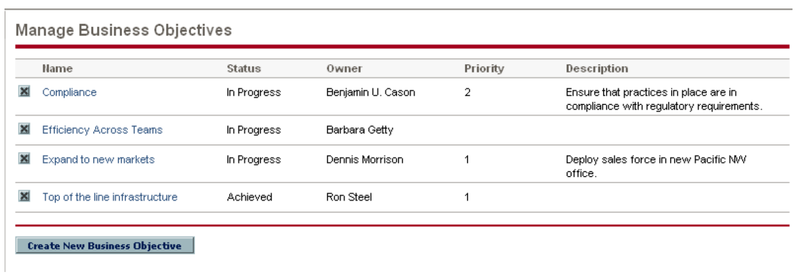
Editing Business Objectives

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:

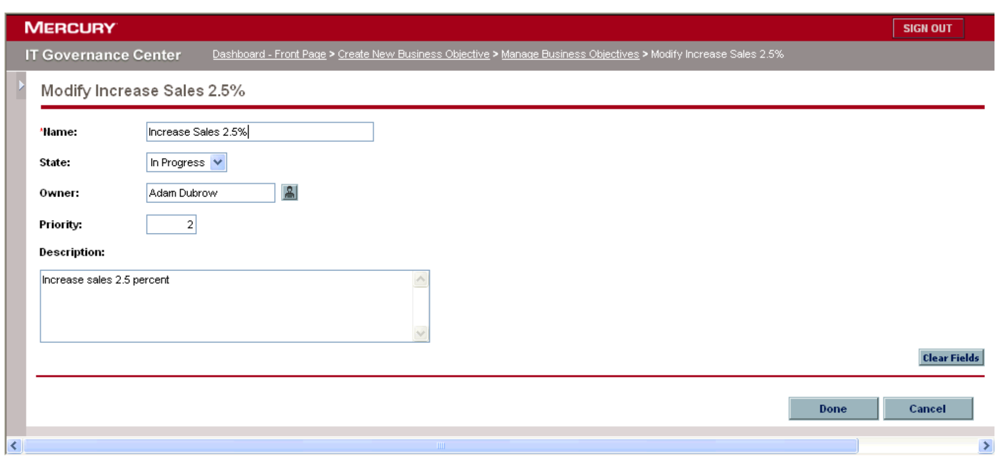
1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Business Objectives > Manage Business Objectives.**

   The Manage Business Objectives page opens and lists existing objectives.



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

   The Modify Business Objective page opens.



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

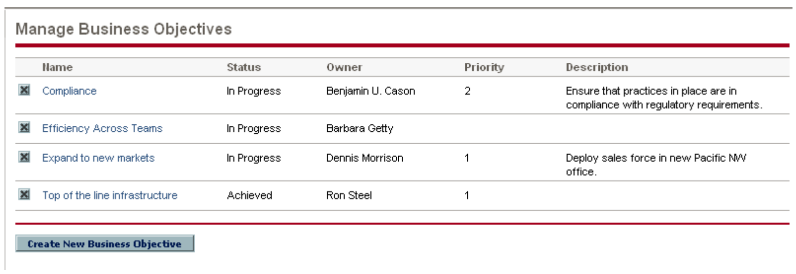
Deleting Business Objectives

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.



Manage Business Objectives

	Name	Status	Owner	Priority	Description
☒	Compliance	In Progress	Benjamin U. Cason	2	Ensure that practices in place are in compliance with regulatory requirements.
☒	Efficiency Across Teams	In Progress	Barbara Getty		
☒	Expand to new markets	In Progress	Dennis Morrison	1	Deploy sales force in new Pacific NW office.
☒	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.

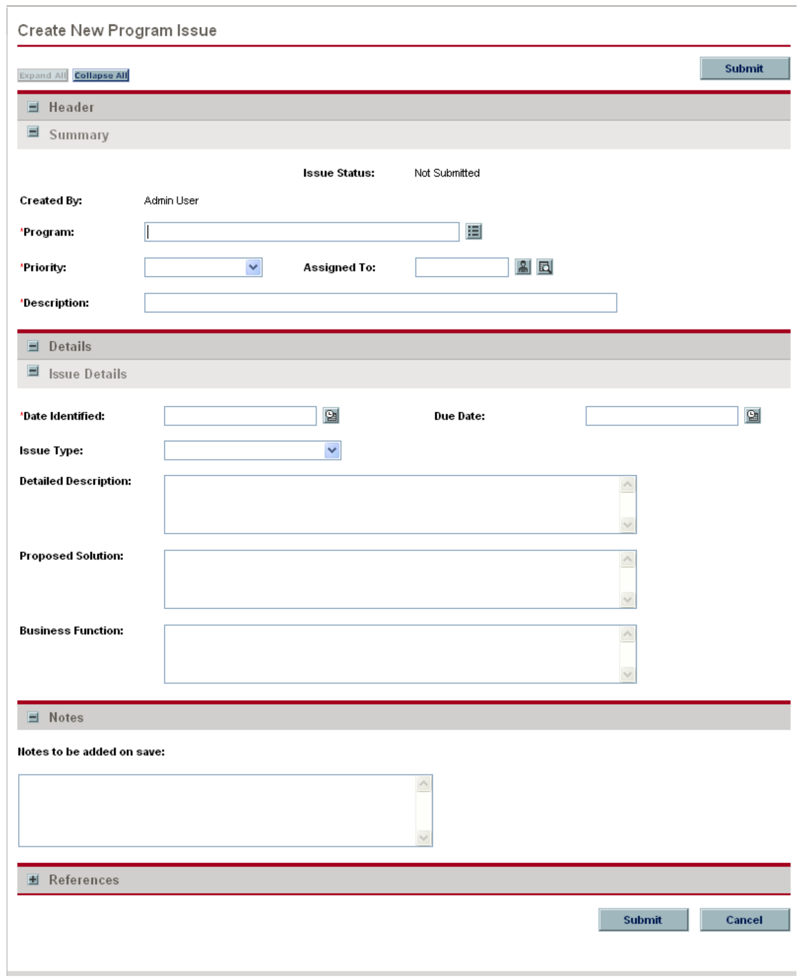
To submit a program issue:

> 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.

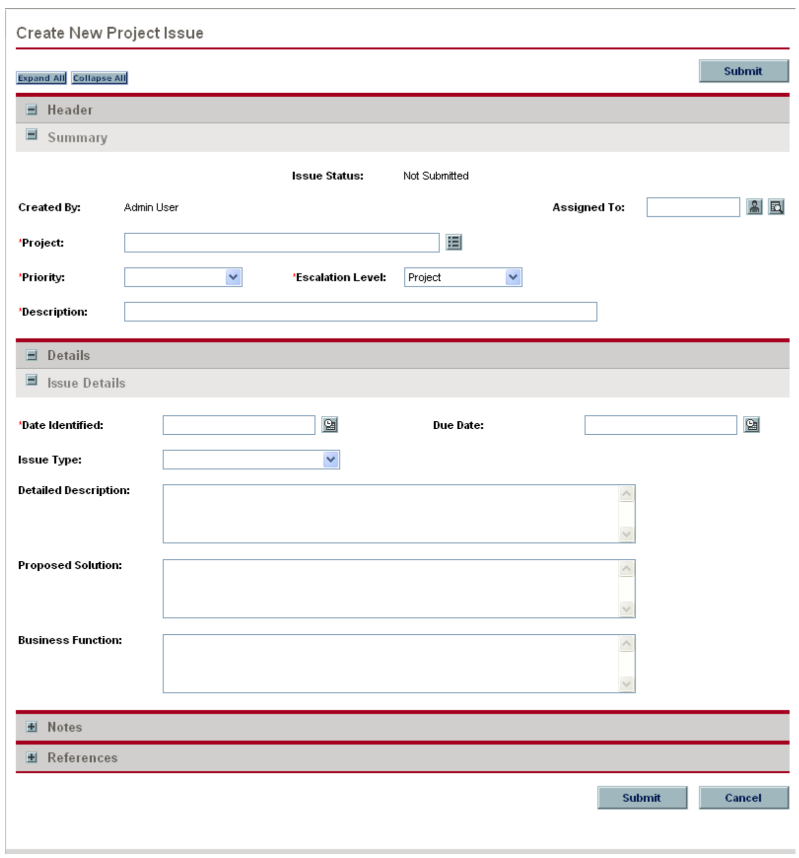
Submitting Project Issues

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.



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.

> **Note:** 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.

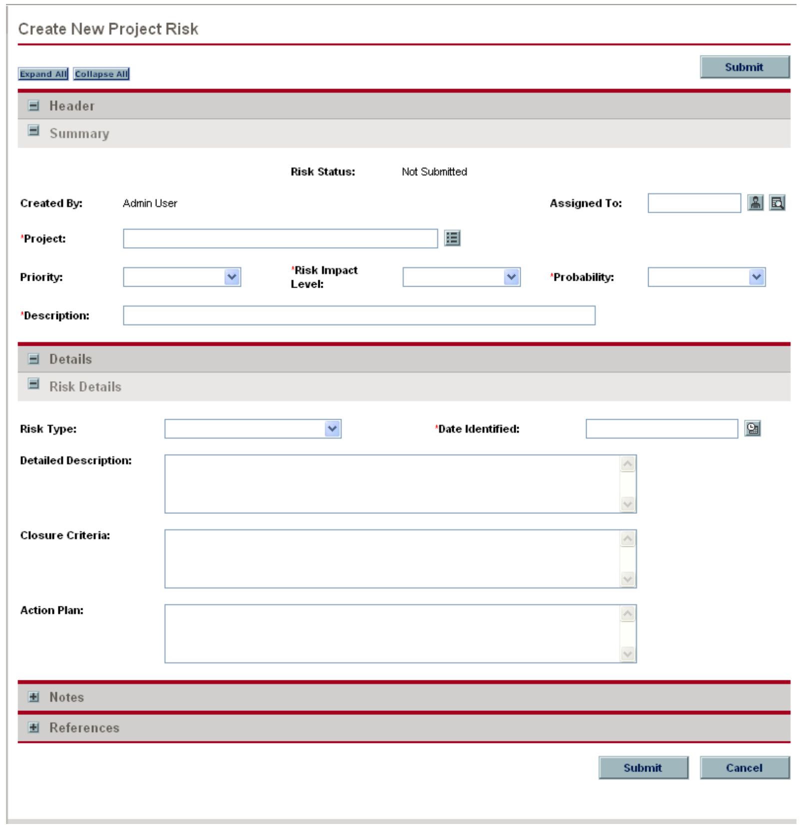
Submitting Project Risks

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.



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 **Probablity** 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.

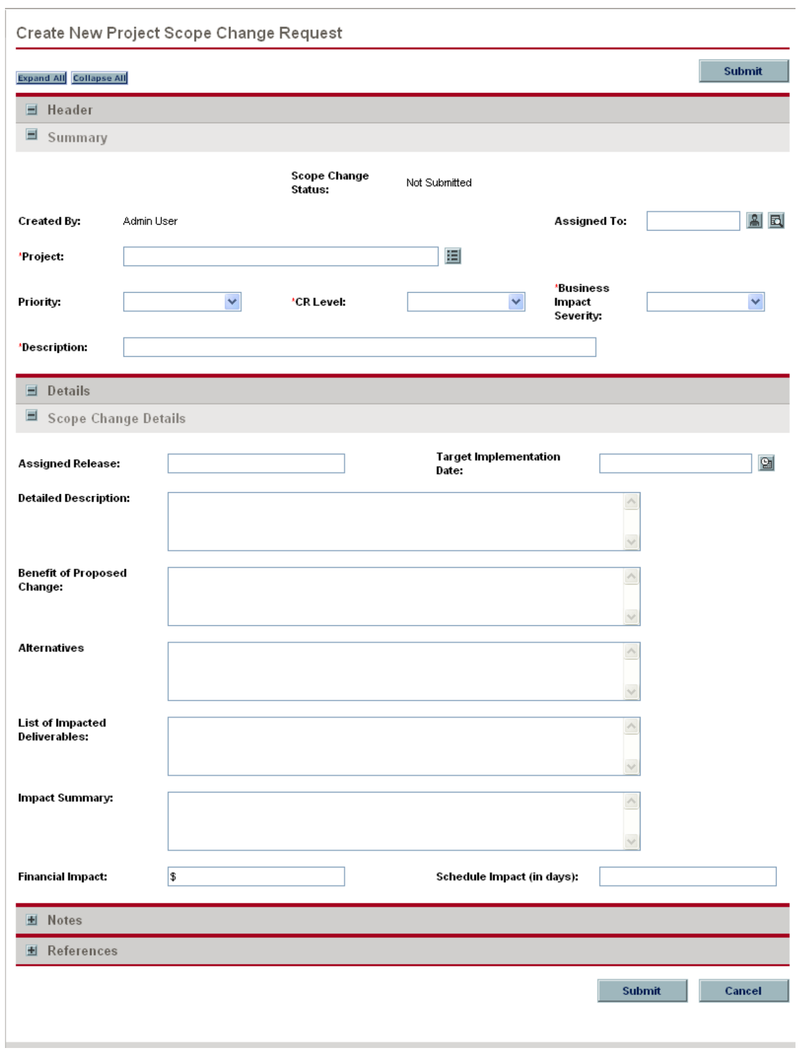
Submitting Project Scope Changes

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.



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.

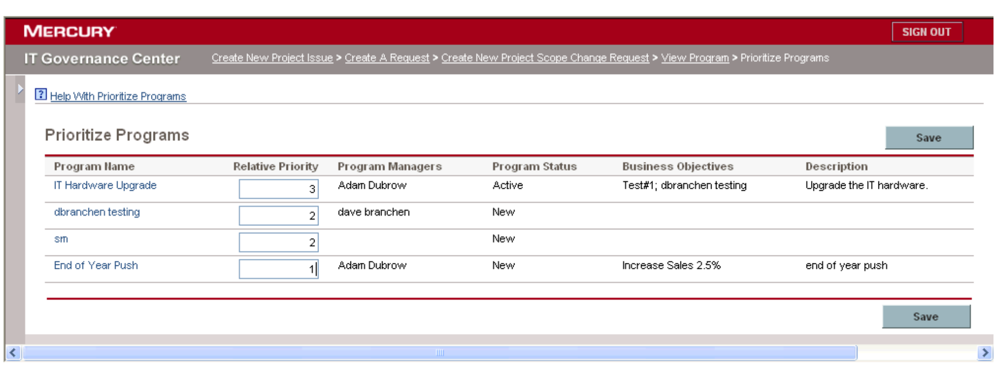
Updating Program Priorities

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.



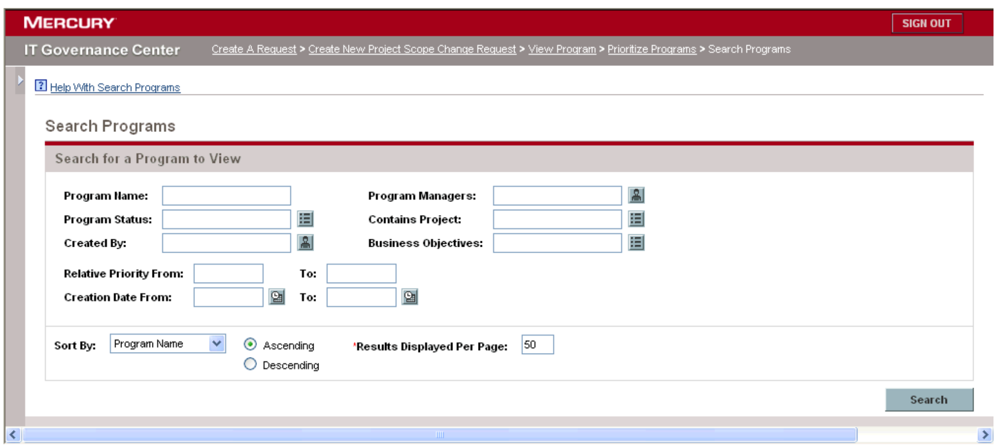
3. In the **Relative Priority** field to the right of the program name, type an integer that indicates the new priority level.
4. If necessary, change the relative priority values for other programs listed.
5. Click **Save.**

Searching for and Viewing Programs

To search for and view an existing program:

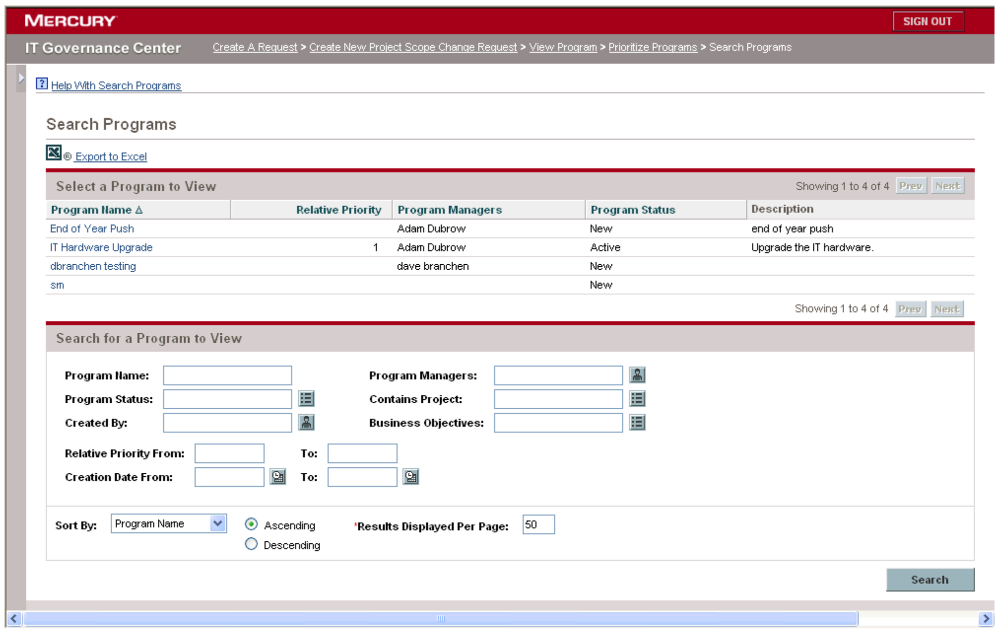
1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Search Programs.**

   The Search Programs page opens.



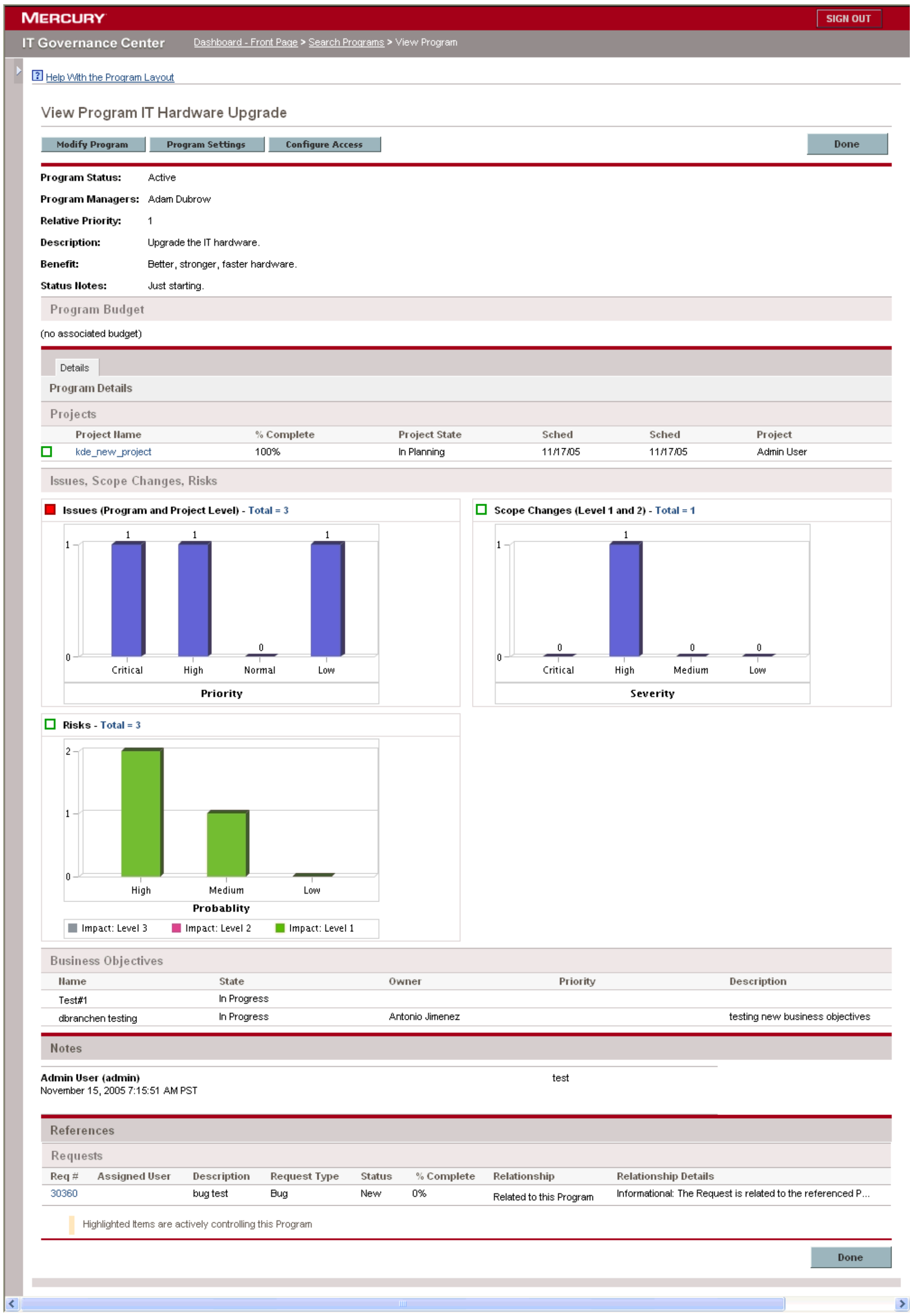
3. Enter your search criteria, and then click **Search.** Alternatively, to see a list of all programs, click **Search** without entering search criteria.

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



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

   The program is displayed on the View Program page.



Modifying General Program Information

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

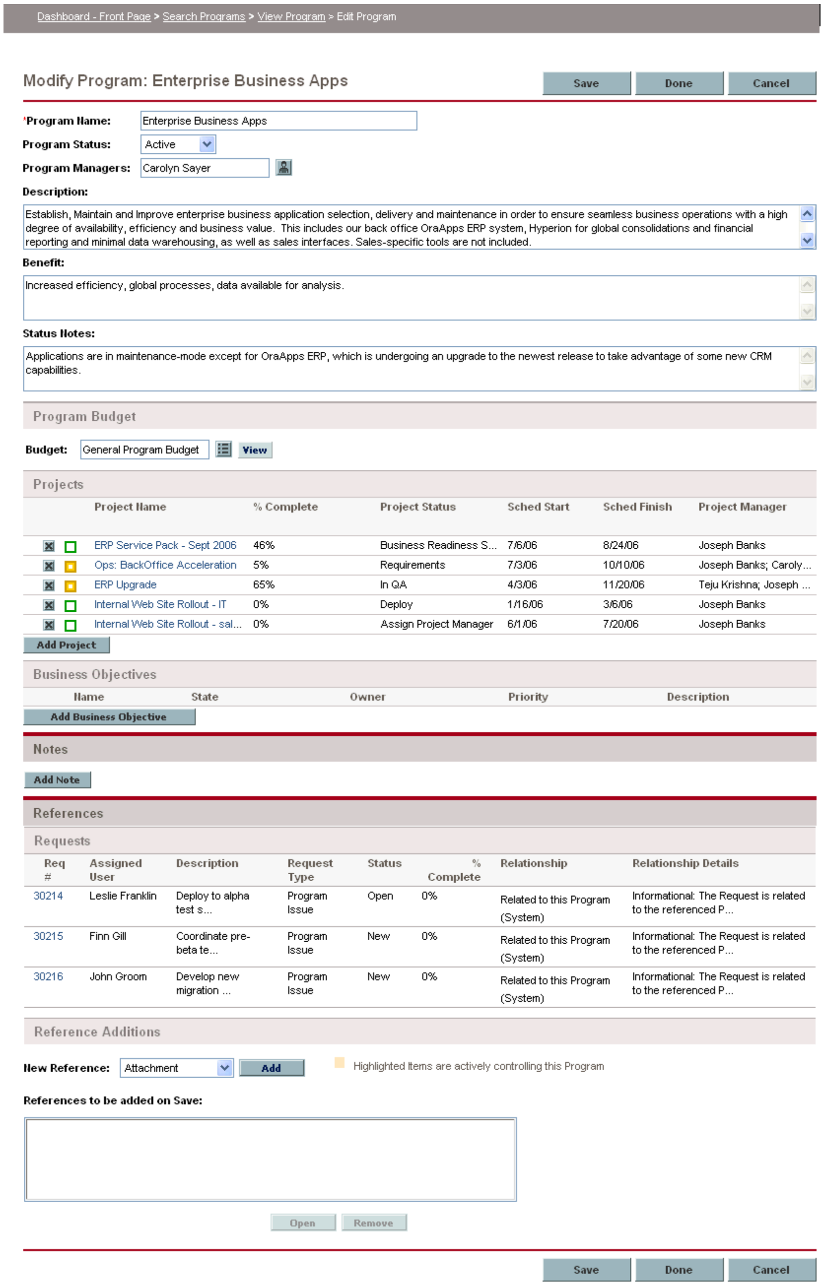
To modify general program information:

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.



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 heath 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 x 5 + 2 x 3 + 6 x 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 x 5 + 3 x 1 + 1 x 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 x 5 + 2 x 1 + 6 x 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

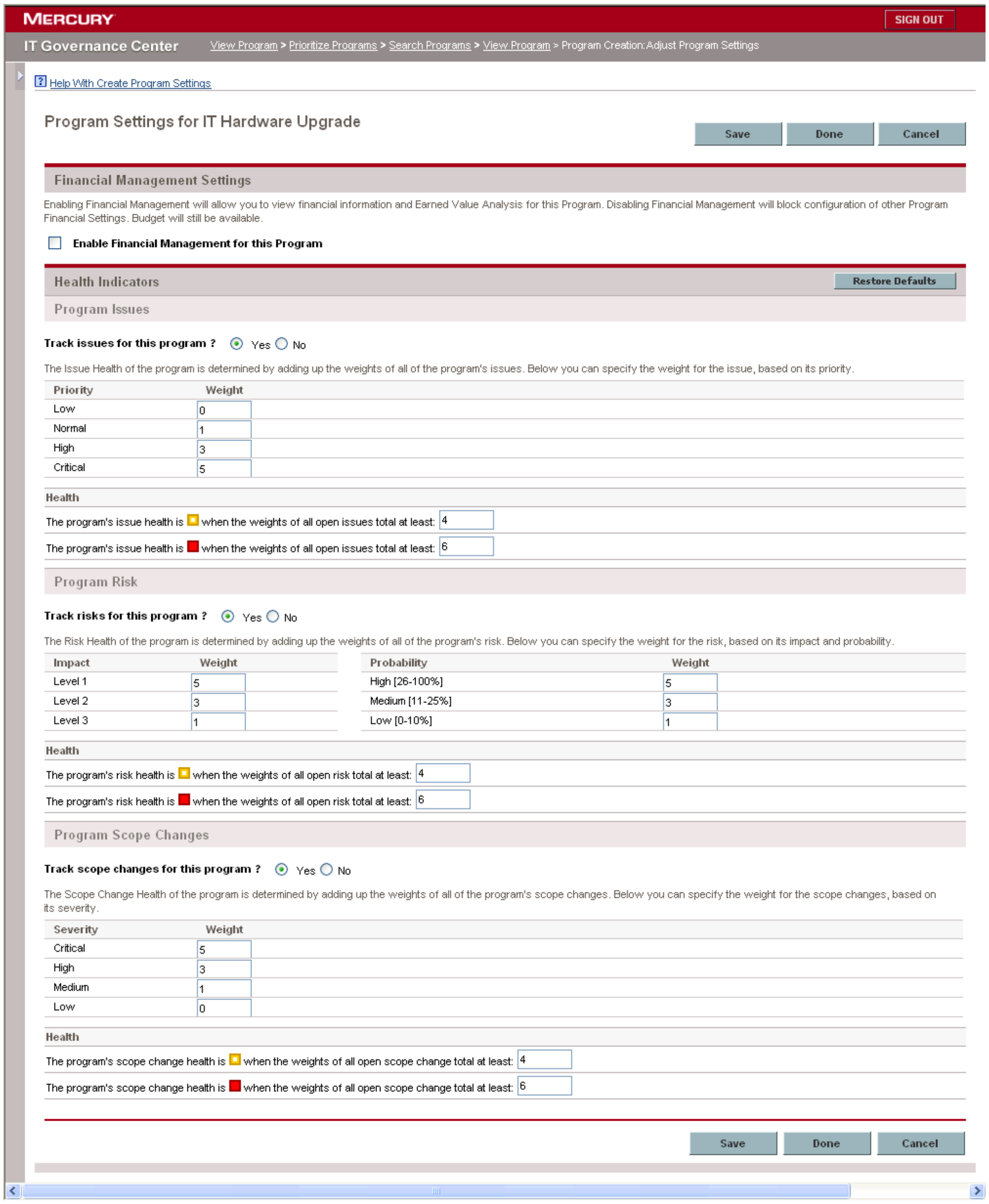
Mercury Financial Management™ capabilities let you track planning-related cost data in the form of budgets. You can view financial information for the projects included in a program if the projects are configured to track this information, and if you enable Financial Management for the program.

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



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.

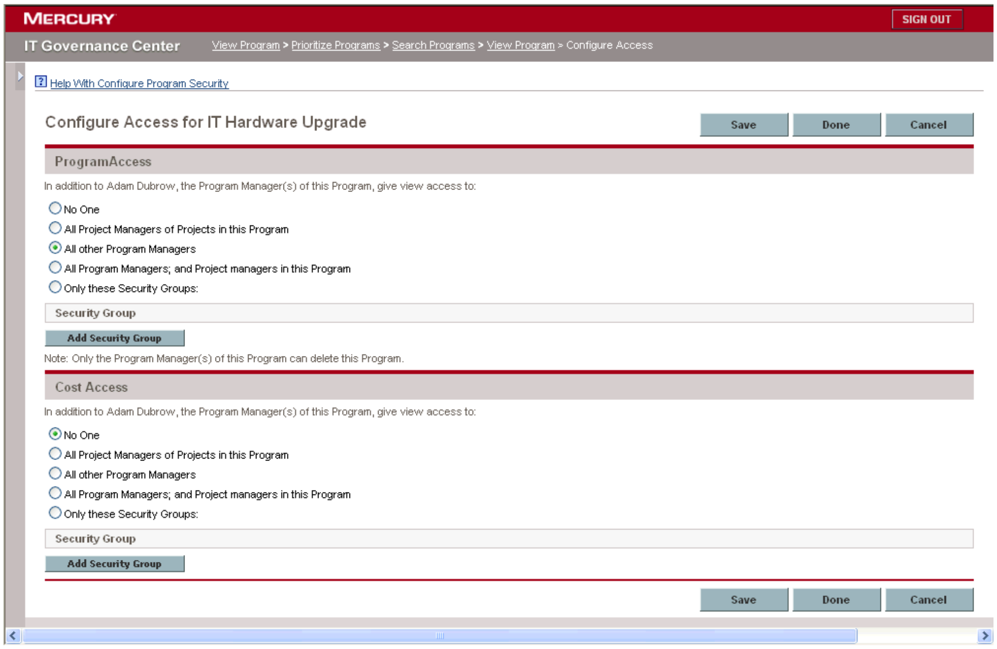
Note

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.

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

   The Configure Access page opens.



4. 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.

5. If you selected **Only these Security Groups,** do the following:

   a. 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.

> **Note** 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**

> **Note** 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

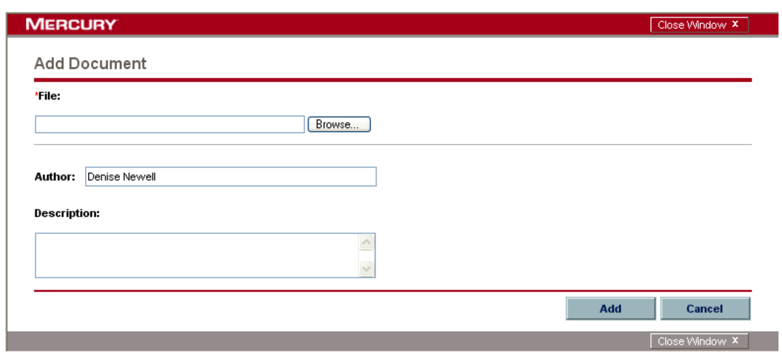
2. At the top of the View Program page, click **Modify Program.**

   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 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.

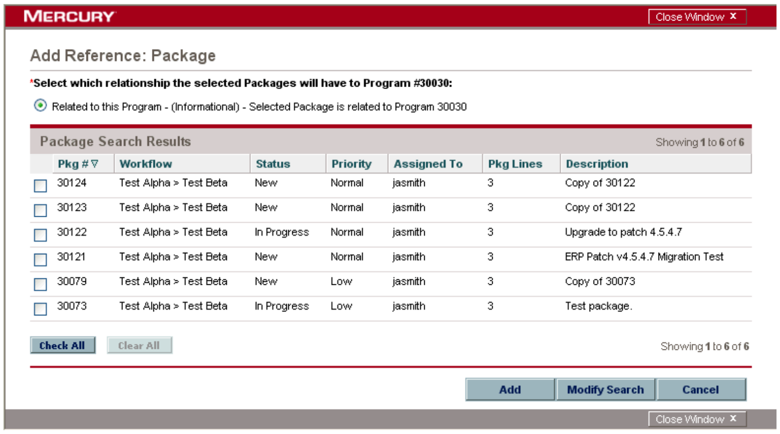
> Note
>
> For information on how to search for and open a program, see *Searching for and Viewing Programs* on page 35

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.

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



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

7. 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.

8. Click **Save.**

New Packages as References

You can add a new package as a program reference.

To reference a new 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.**

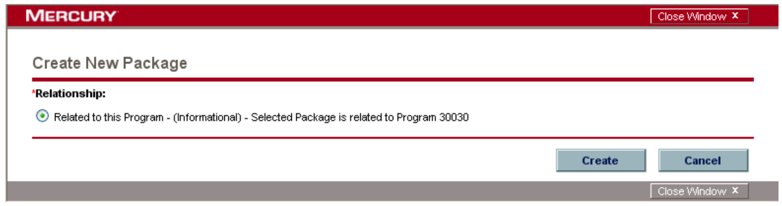
   The Modify Program page opens.

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

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

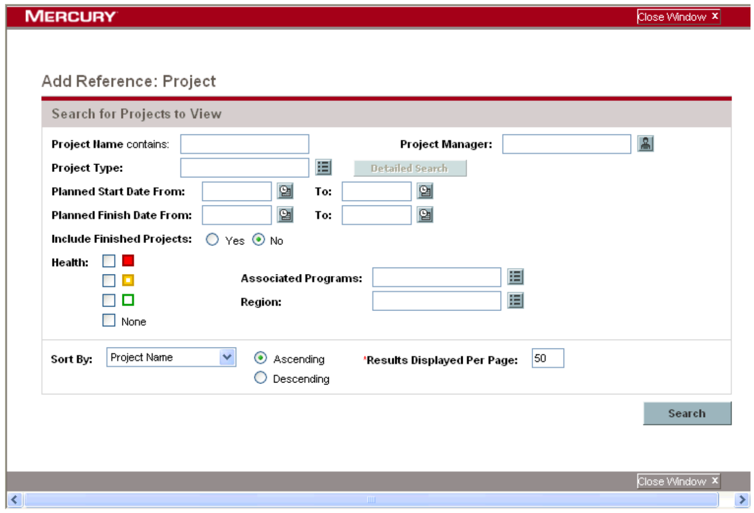
   The Modify Program page opens.

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

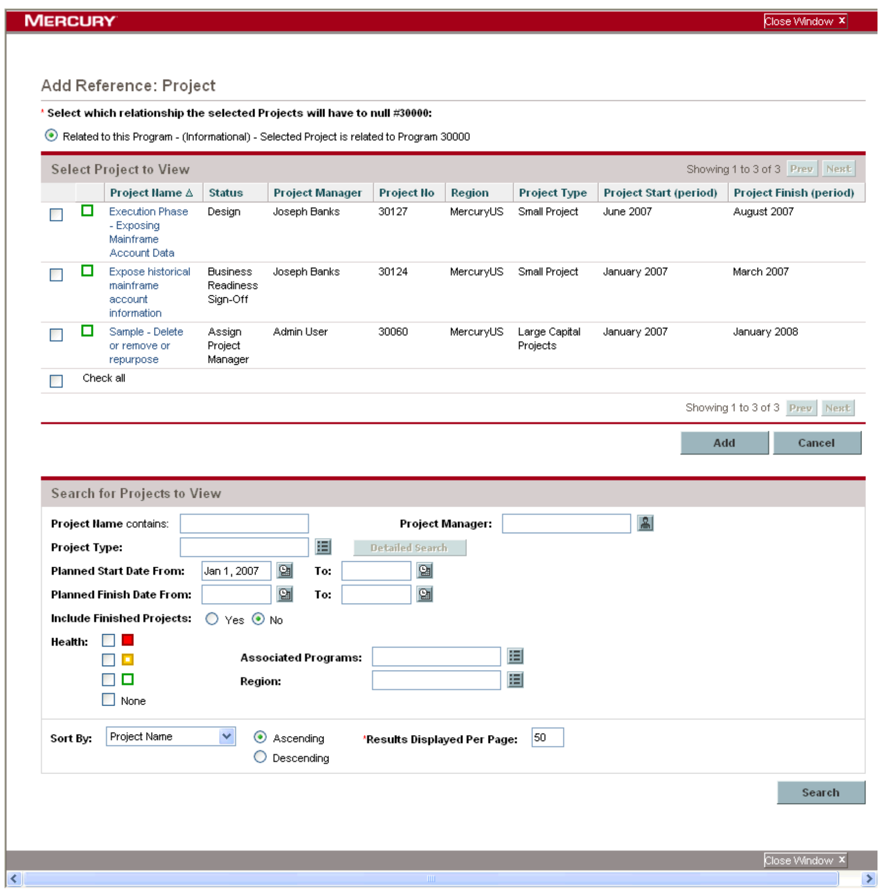
4. In the **New Reference** list, select **Project.**

5. Click **Add.**

   The Add Reference: Project window opens.



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



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

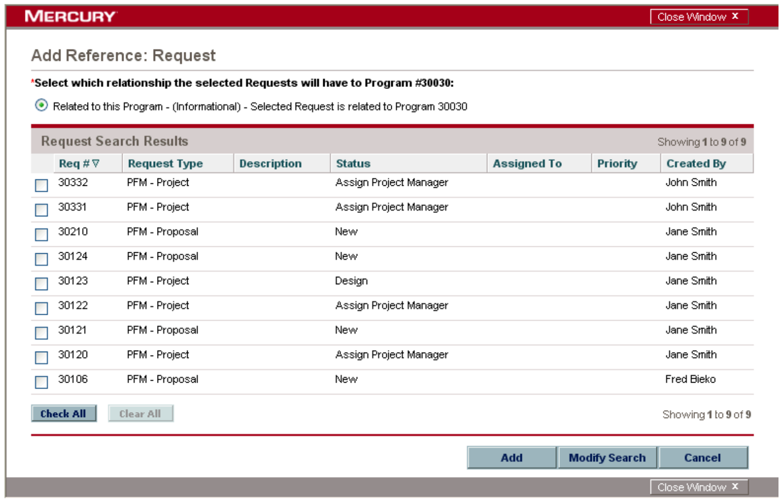
2. At the top of the View Program page, click **Modify Program.**

   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.

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



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.

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

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

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

New Requests as References

To add a new request 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

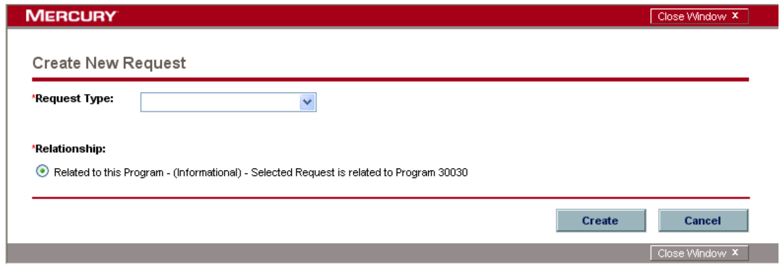
2. At the top of the View Program page, click **Modify Program.**

   The Modify Program page opens.

3. Scroll to the **References** section.
4. In the **New Reference** list, select **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.

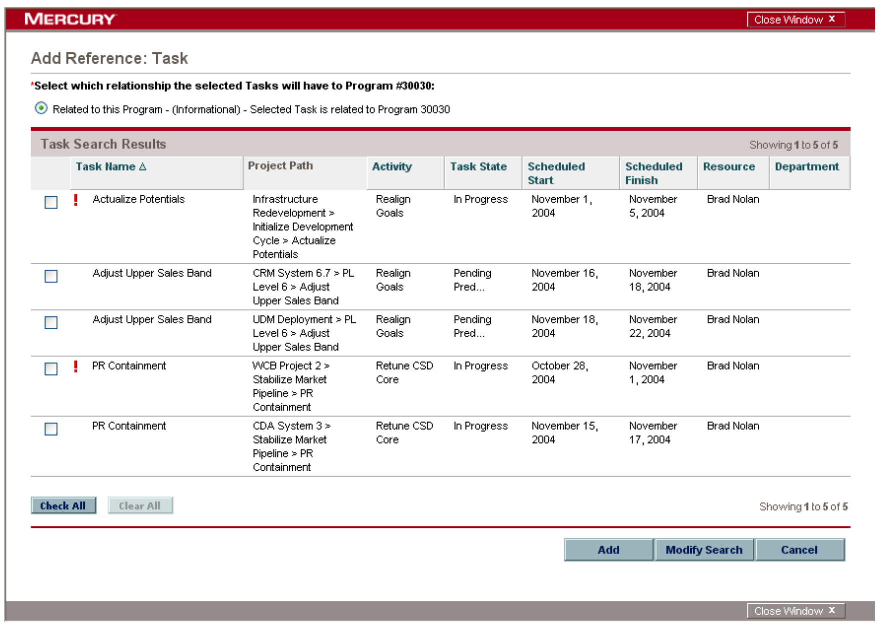
3. Scroll to the **References** section.

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.



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

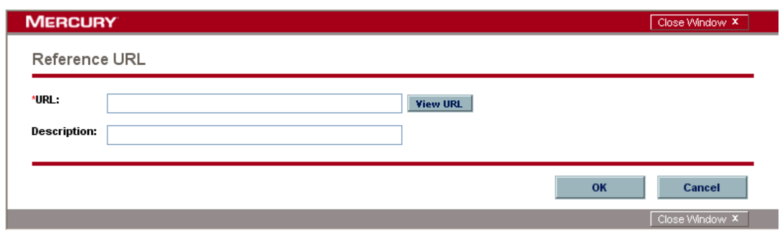
> For information on how to search for and open a program, see *Searching for and Viewing Programs* on page 35

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.



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

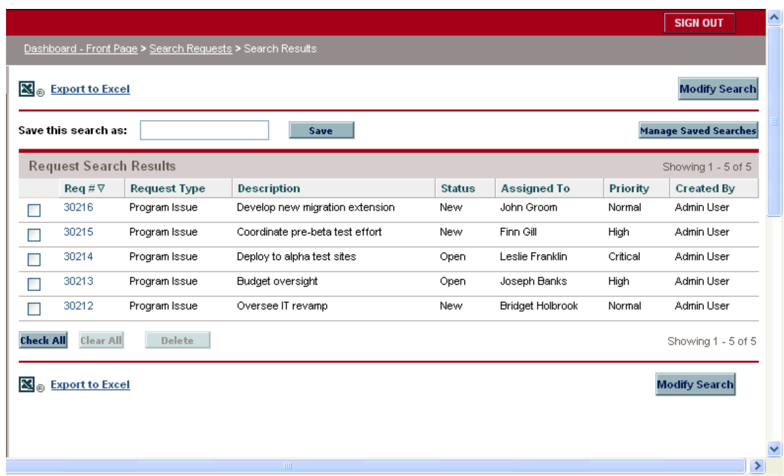
To search for program issues:

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.

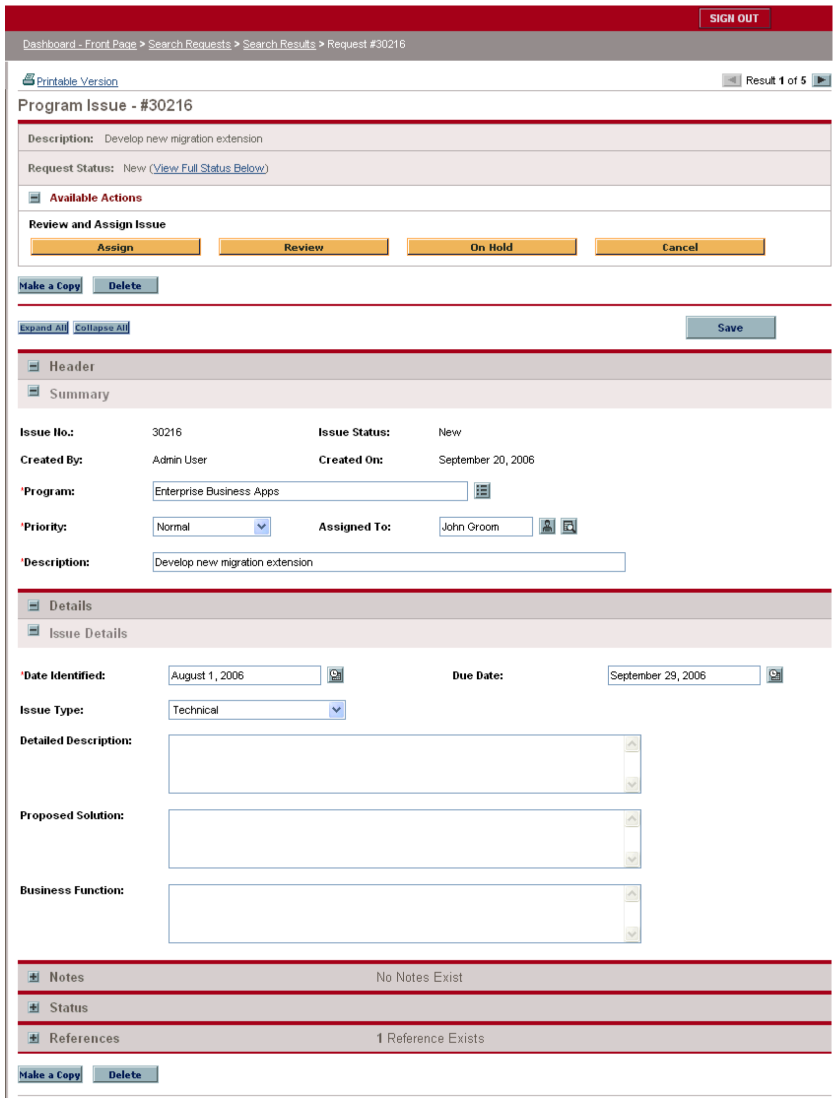
3. Enter the search criteria for the request, and then click **Search.**

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



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

   The Program Issue page opens.



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

Searching for Project Issues

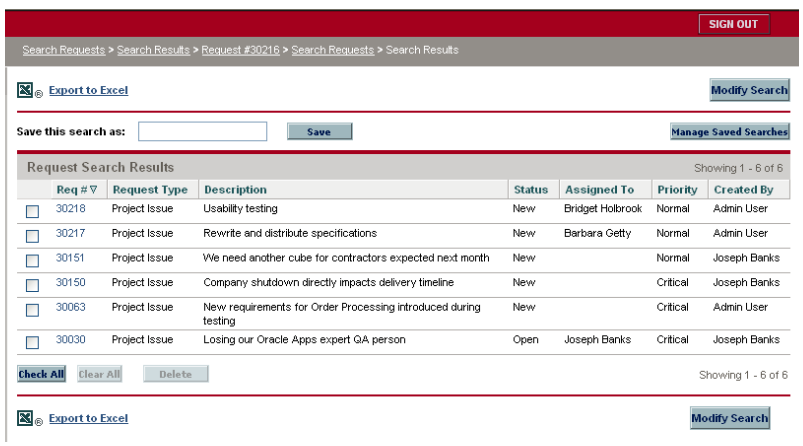
To search for project issues:

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.

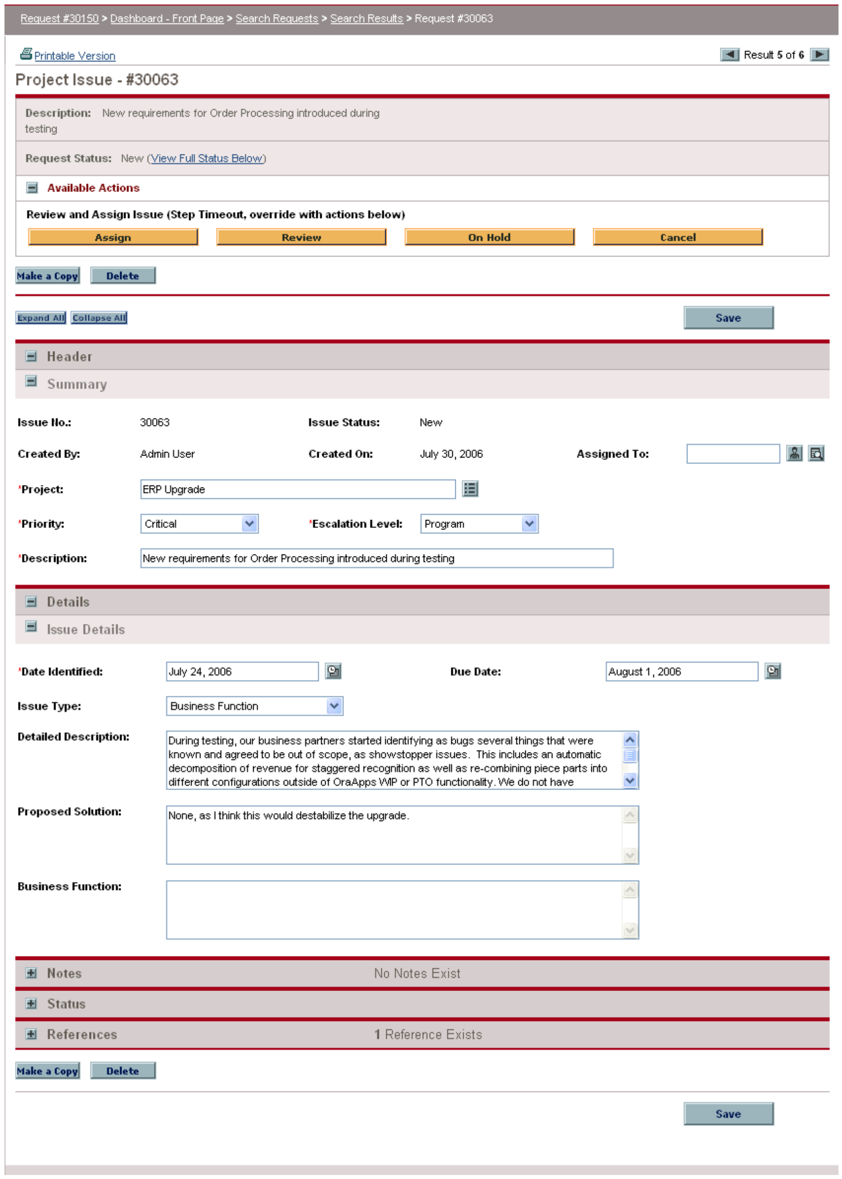
3. Enter your search criteria for the request, and then click **Search.**

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



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

   The Project Issue page opens.



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.

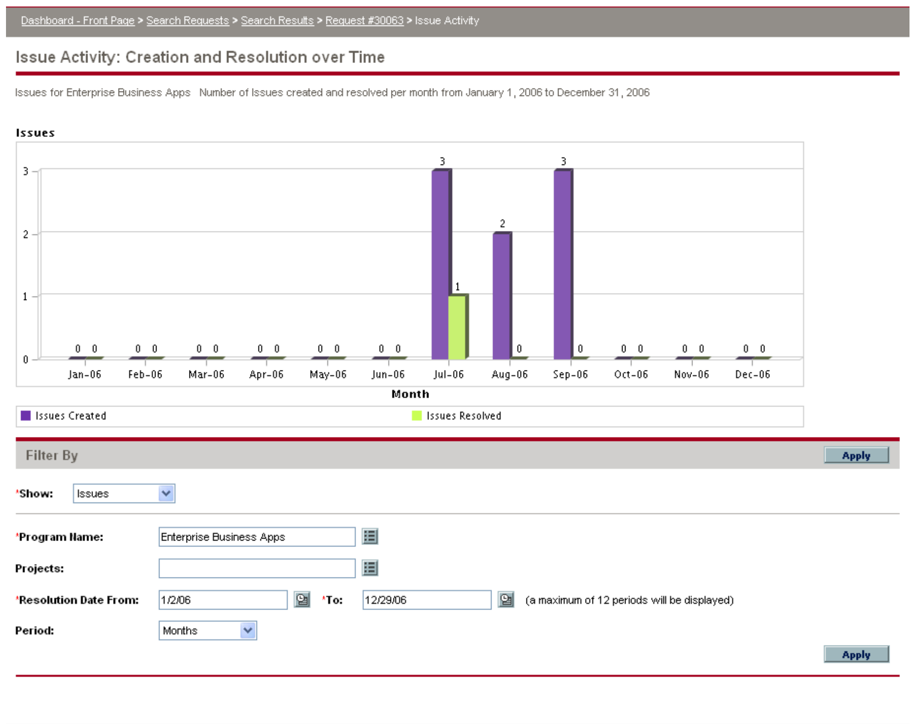
   Note

   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.

   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.**

   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.

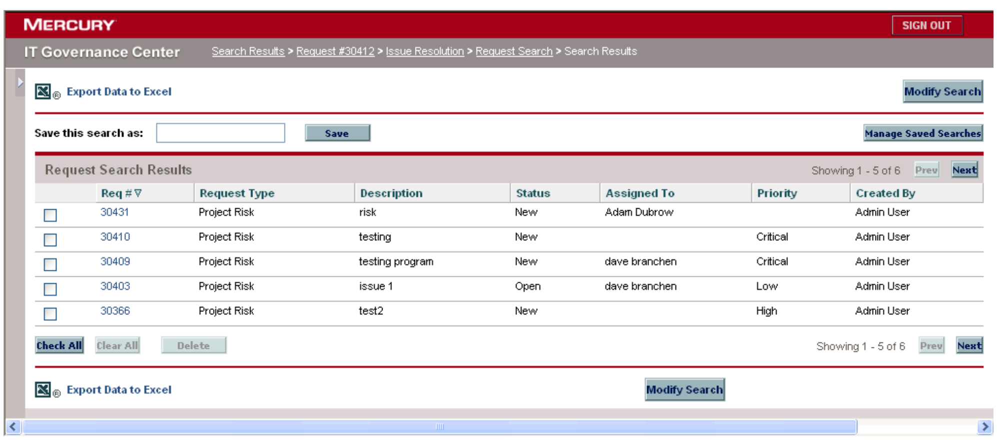
Searching for Risks

To search for project risks:

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

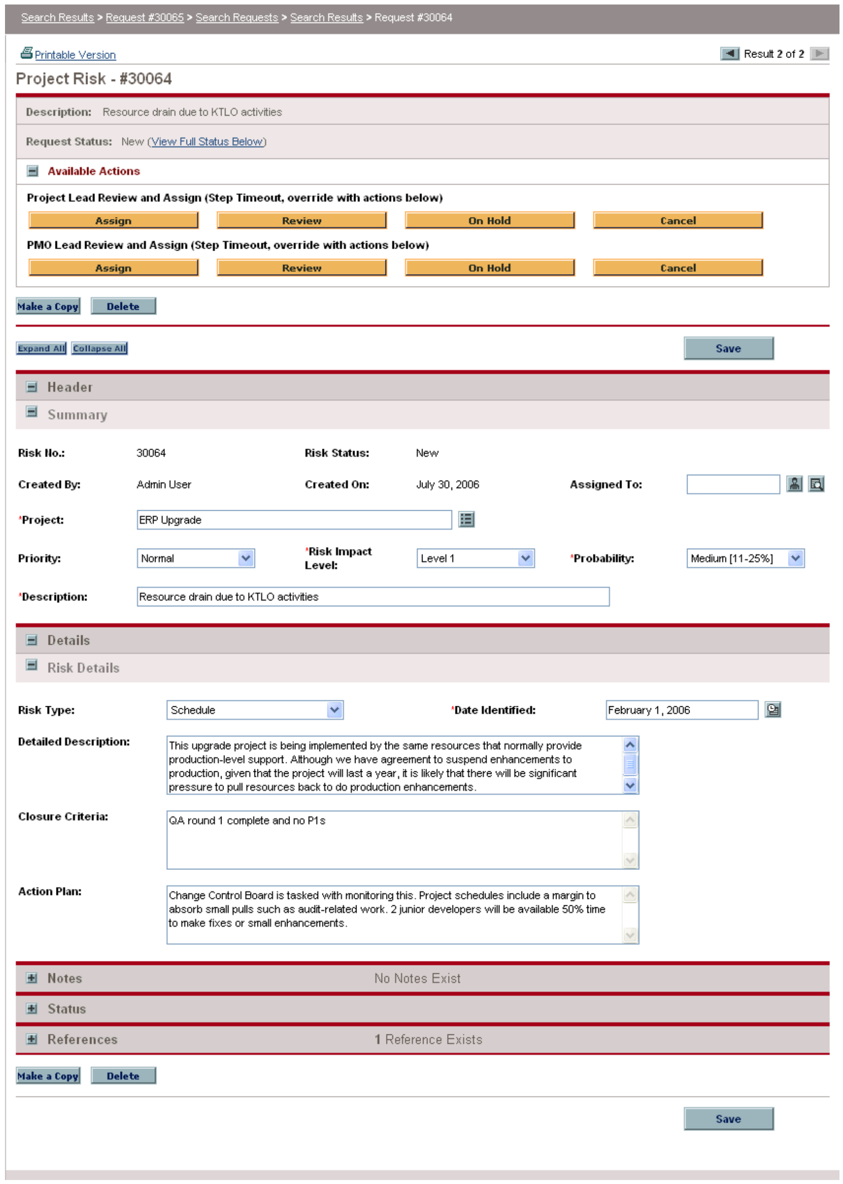
   The Search Requests page opens. Under **Search for Requests to Review, Project Risk** is selected in the **Request Type** field.
3. In the **Search for Requests to View** section, enter the search criteria for the request.
4. To configure the display of the search results, in the **Choose Columns** section, 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.



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

   The Project Risk page opens.



7. 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 1and 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:

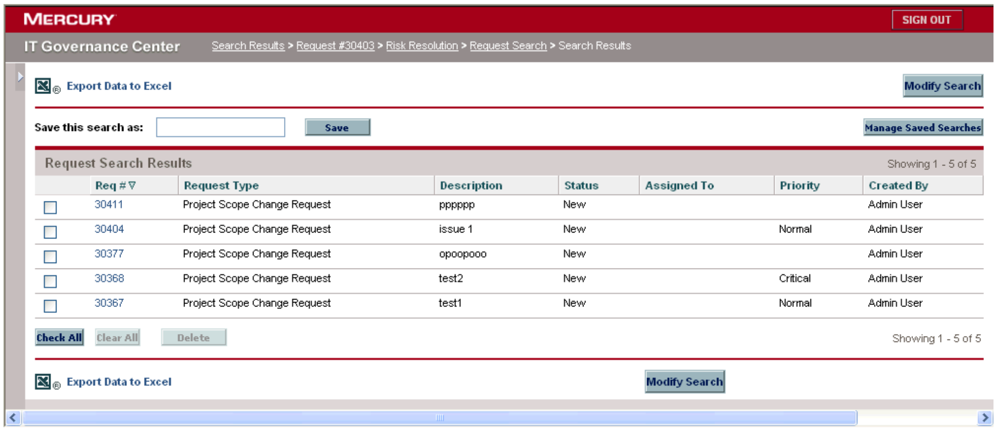
1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Program Management > Scope Changes > Search Scope Changes.**

   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

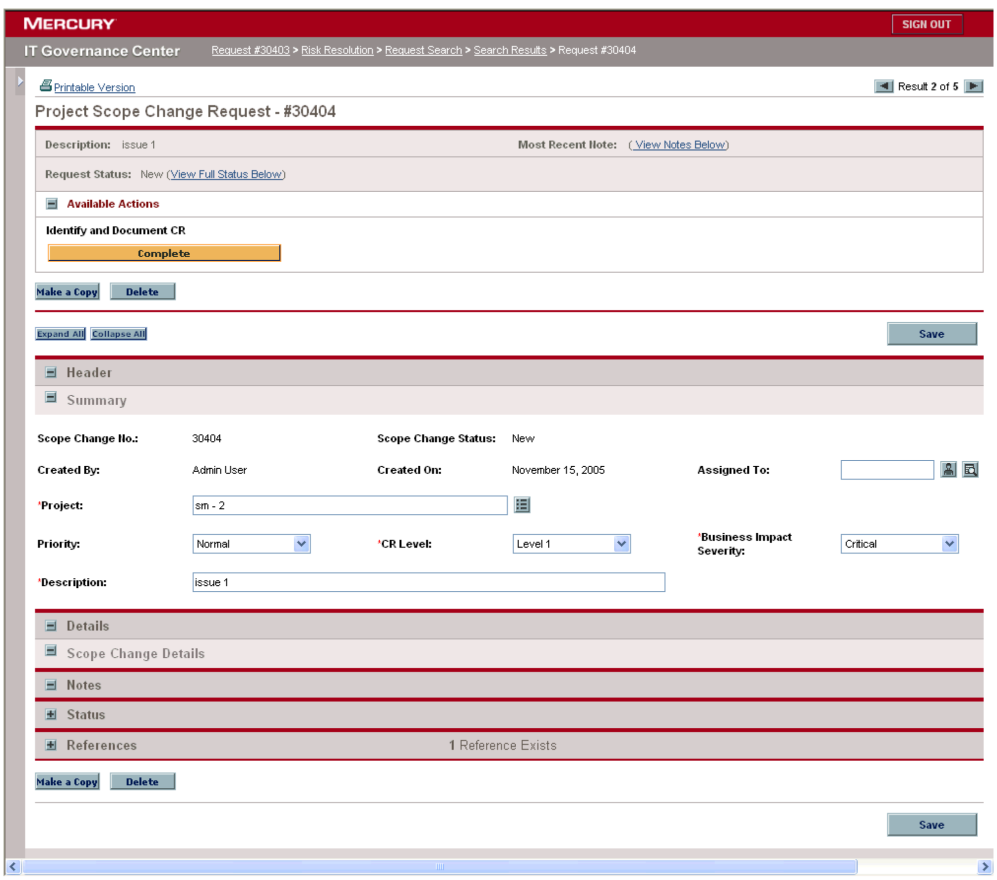
> To list all project scope change requests, click **Search** without specifying search criteria.

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



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

   The Project Scope Change Request page opens.



7. 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.

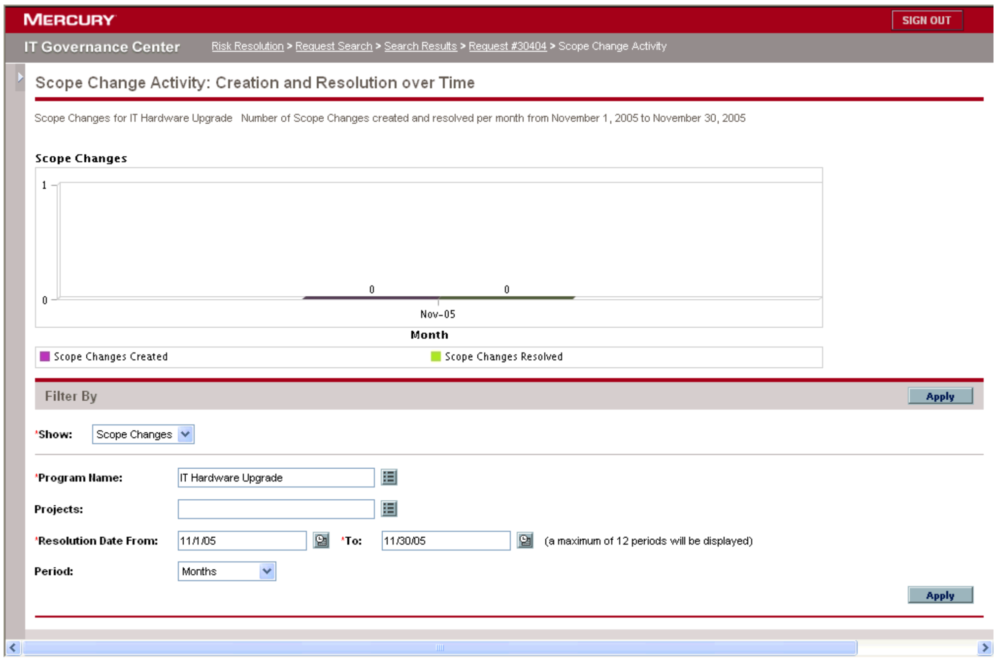
   b. In the **Projects** field, enter the names of the projects linked to the selected program for which you want to the information.

   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.



5. 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:

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

   The Scope Change 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 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.

Note

> 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

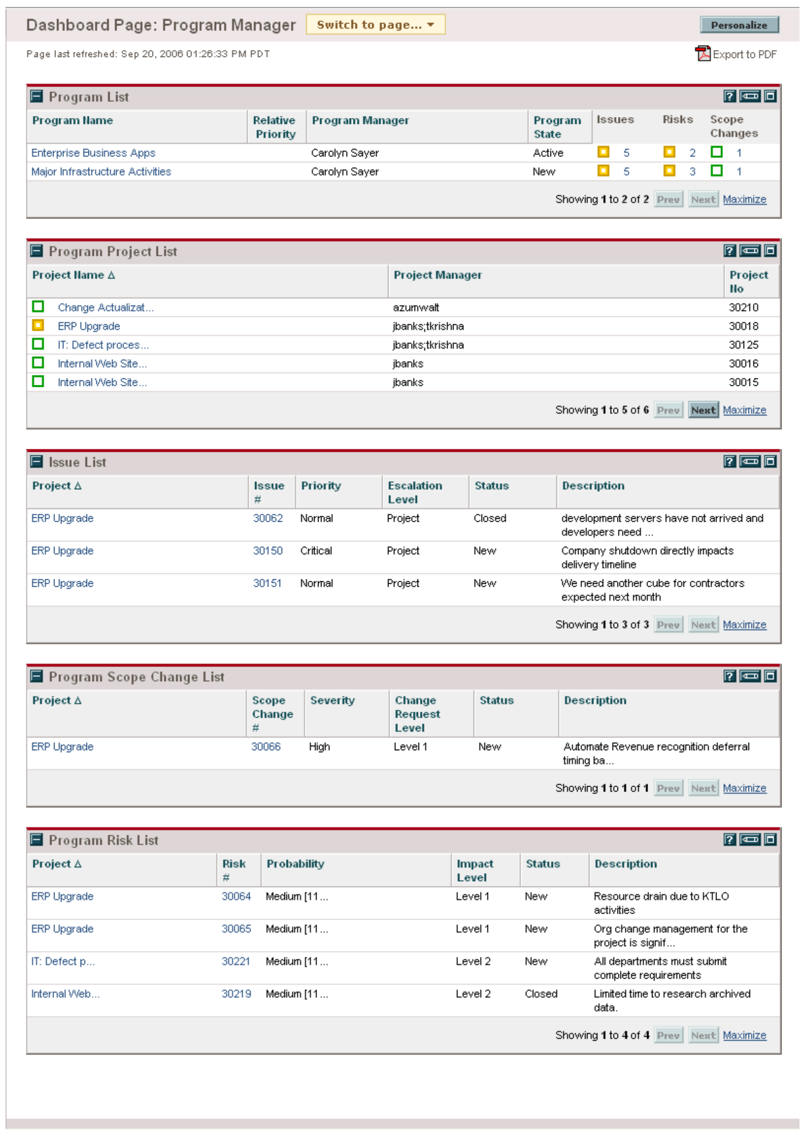
In This Chapter:

- *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



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.**

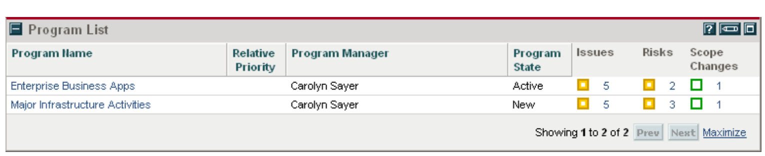
Portlets on the Program Manager Page

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 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

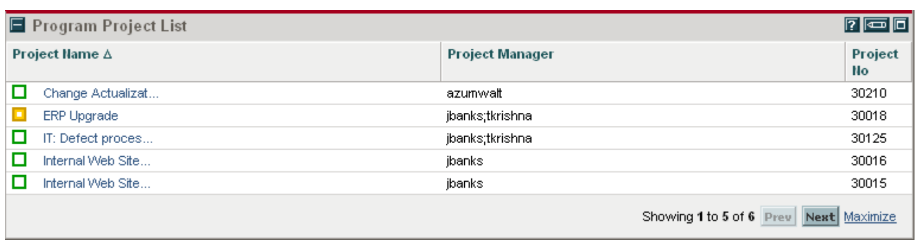
> **Note**
> To view a listed program, click an item in the **Program Name** column.

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



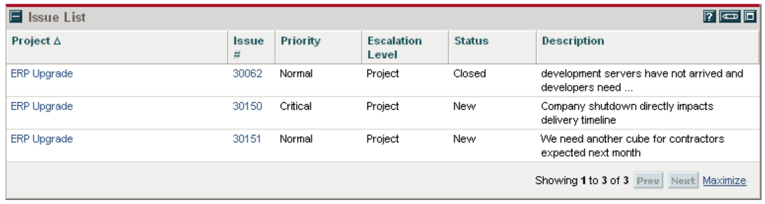
To display descriptions of all the filter fields that you can configure for the Program Project List portlet, at the upper-right corner of the portlet, click the **Help** icon.

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



Issue List

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

Showing 1 to 3 of 3 Prev Next Maximize

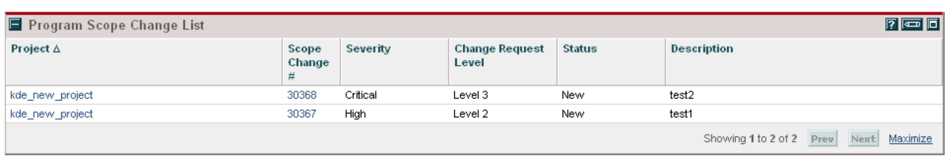
To display descriptions of all the filter fields that you can configure for the Issue List portlet, at the upper-right corner of the portlet, click the **Help** icon.

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



Program Scope Change List

Project ∆	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

Showing 1 to 2 of 2 Prev Next Maximize

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.

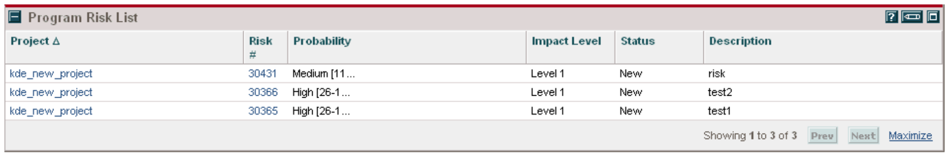
Program Risk List Portlet

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



Program Risk List

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

Showing 1 to 3 of 3 Prev Next Maximize

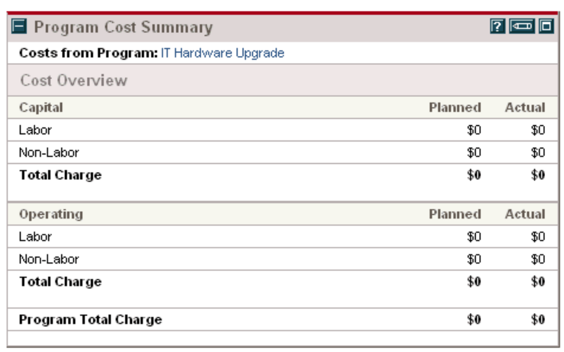
To display descriptions of all the filter fields that you can configure for the Program Risk List portlet, at the upper-right corner of the portlet, click the **Help** icon.

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



Program Cost Summary

Costs from Program: IT Hardware Upgrade

Cost Overview

Capital	Planned	Actual
Labor	$0	$0
Non-Labor	$0	$0
Total Charge	**$0**	**$0**

Operating	Planned	Actual
Labor	$0	$0
Non-Labor	$0	$0
Total Charge	**$0**	**$0**
Program Total Charge	**$0**	**$0**

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.*

Index

A

access
- cost 50
- for programs 50
- program 50

adding
- Program Manager page to the Dashboard 85

analyzing
- issue resolution 70
- risk activity 74
- risk resolution time 75
- scope change activity 78
- scope change resolution time 79

attachments as references 53

B

business objectives
- configuring 21
- creating from Program Management 20
- deleting 22
- managing 21
- overview 20

C

configuring
- business objectives 21
- program indicators 41

cost access 50

costs
- Cost Performance Index 46
- Schedule Performance Index 46

CPI 46

creating
- business objectives 20
- program access 50
- program issues 24
- programs 16
- programs, an overview 16
- project issues 26
- project risks 27
- project scope changes 30

customizing
- portlets on a Dashboard page 89

D

Dashboard
- customizing portlet
  - portlets
    - changing the title 89

deleting
- business objectives 22

F

financial management 46

I

introduction
- to Mercury Program Management 10

Issue List portlet 86

issues
- analyzing activity 69
- analyzing issue activity 69
- analyzing resolution 70
- managing 64
- managing processes 80
- project level 41
- searching for project issues 67
- searching program issues 65

M

managing
- business objectives 21
- issue processes 80
- issues 64
- program processes 80
- risk processes 81
- risks 71
- scope change processes 81
- scope changes 76

menu bar
- Program Management 11

Mercury Program Management
- introduction to 10

modifying
- general program information 38

P

packages
- existing packages as references 54
- new packages as references 55

portlets
- customizing 89
- Issue List 86
- Program Cost Summary 88
- Program List 85
- program Project List 86
- Program Risk List 87
- Program Scope Change List 87

priorities updating for programs 34

program access 50

Program Cost Summary portlet 88

program issues
- creating 24
- overview 22

Program List portlet 85

Program Management
- menu bar 11
- overview 10

Program Management portlets
- Issue List 86

Program Manager Page 83

Program Manager page
- adding to the Dashboard 85
- overview 84

Program Project List portlet 86

Program Risk List portlet 87

Program Scope Change List portlet 87

programs
- configuring indicators 41
- creating 16
- creating access 50
- creating, an overview 16
- managing processes 80
- modifying general information 38
- overview 10
- references 53
- searching 35
- submitting requests 22
- updating priorities 34
- viewing 35

project issues
- creating 26
- overview 23

project risks
creating 27
overview 23
project scope changes
creating 30
overview 23

R

references
attachments 53
existing packages 54
new packages 55
new requests 58, 59
projects
projects as references 56
tasks 60
URLs 62
references for programs 53
related documents 13
requests
and programs 22
requests as references 58, 59
risks
analyzing activity 74
analyzing resolution time 75
configuring program settings 43
managing 71
managing processes 81
overview 23
searching 72

S

scope changes
adjusting program settings 44
analyzing activity 78
analyzing resolution time 79
managing 76
managing processes 81
searching 76
searching
program issues 65
programs 35
project issues 67
risks 72
scope changes 76
SPI 46
submitting
program issues 24
project issues 26
project risks 27
project scope changes 30
requests 22

T

tasks as references 60

U

URLs as references 62
using
Program Project List portlet 86

V

viewing programs 35