

Mercury IT Governance Center™

**Mercury Project Management™
Configuration Guide**

Version: 7.0



This manual, and the accompanying software and other documentation, is protected by U.S. and international copyright laws, and may be used only in accordance with the accompanying license agreement. Features of the software, and of other products and services of Mercury Interactive Corporation, may be covered by one or more of the following patents: United States: 5,511,185; 5,657,438; 5,701,139; 5,870,559; 5,958,008; 5,974,572; 6,137,782; 6,138,157; 6,144,962; 6,205,122; 6,237,006; 6,341,310; 6,360,332; 6,449,739; 6,470,383; 6,477,483; 6,549,944; 6,560,564; 6,564,342; 6,587,969; 6,631,408; 6,631,411; 6,633,912; 6,694,288; 6,738,813; 6,738,933; 6,754,701; 6,792,460 and 6,810,494. Australia: 763468 and 762554. Other patents pending. All rights reserved.

U.S. GOVERNMENT RESTRICTED RIGHTS. This Software Documentation is a “commercial item” as defined at 48 C.F.R. 2.101 (October 1995). In accordance with 48 C.F.R. 12.212 (October 1995), 48 C.F.R. 27.401 through 27.404 and 52.227-14 (June 1987, as amended) and 48 C.F.R. 227.7201 through 227.7204 (June 1995), and any similar provisions in the supplements to Title 48 of the C.F.R. (the “Federal Acquisition Regulation”) of other entities of the U.S. Government, as applicable, all U.S. Government users acquire and may use this Documentation only in accordance with the restricted rights set forth in the license agreement applicable to the Computer Software to which this Documentation relates.

Mercury, Mercury Interactive, the Mercury logo, the Mercury Interactive logo, LoadRunner, WinRunner, SiteScope and TestDirector are trademarks of Mercury Interactive Corporation and may be registered in certain jurisdictions. The absence of a trademark from this list does not constitute a waiver of Mercury's intellectual property rights concerning that trademark.

All other company, brand and product names may be trademarks or registered trademarks of their respective holders. Mercury disclaims any responsibility for specifying which marks are owned by which companies or which organizations.

Mercury provides links to external third-party Web sites to help you find supplemental information. The content and availability may change without notice. Mercury makes no representations or warranties whatsoever as to the content or availability.

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

© 1997–2006 Mercury Interactive Corporation. All rights reserved.

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

Table of Contents

List of Figures	v
List of Tables	vii
Chapter 1: Getting Started with Project Management Configuration	9
Introduction to Mercury Project Management Configuration.....	10
Related Documents.....	12
Chapter 2: Key Server Parameters	13
Overview.....	14
Work Plan Page Size Controls.....	14
Cost Calculation Settings.....	16
Microsoft Project Integration Options	19
Enabling Microsoft Project Launch from a Work Plan	19
Mapping Work Plans to Microsoft Project Files.....	19
Chapter 3: Configuring Project Details Tab Fields	21
Overview of Configuring Project Details Tab Fields.....	22
Project Details Tab Fields.....	22
Configuring Project Details Tab Fields	25
Chapter 4: Configuring the Project Process	27
Overview of Configuring the Project Process	28
Project Process.....	28
Configuring the Project Process.....	29

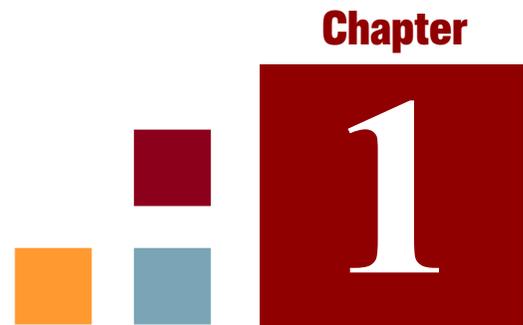
Chapter 5: Configuring Project Control Processes	31
Overview of Configuring Project Control Processes	32
Configuring Project Control Entities.....	32
Project Issue Request Type.....	32
Risk Request Type.....	34
Scope Change Request Type.....	34
Configuring the Project Control Entities.....	36
Configuring Project Control Processes.....	37
Project Issue Workflow	37
Risk Workflow	38
Scope Change Workflow	39
Configuring the Project Control Workflows	40
Chapter 6: Configuring Task User Data	41
Configuring User Data.....	42
Index	43

List of Figures

Figure 2-1	Edit My Profile page.....	14
Figure 2-2	Project budget with automatic roll-up from work plan.....	16
Figure 3-1	Project Overview page: Details tab.....	23
Figure 4-1	Project process.....	28
Figure 5-1	Issue management workflow.....	37
Figure 5-2	Risk management workflow.....	38
Figure 5-3	Scope change request workflow.....	39

List of Tables

Table 2-1	server.conf parameters for work plan page size controls	15
Table 2-2	server.conf parameters for periodic cost calculations.....	17
Table 2-3	server.conf parameters for work plan information	18
Table 3-1	Default project fields	24
Table 5-1	Project issue fields.....	32
Table 5-2	Risk fields.....	34
Table 5-3	Scope change request fields	35



Getting Started with Project Management Configuration

In This Chapter:

- *Introduction to Mercury Project Management Configuration*
 - *Related Documents*
-

Introduction to Mercury Project Management Configuration

Mercury Project Management™ enables organizations to streamline and standardize the management of project activities using a template-based, collaborative approach.

The **Project Details** tab of the Project Overview page contains fields delivered as best-practice content for projects. These fields do not need to be set up or altered in any way before you start using Mercury Project Management, but if you want to change them, they can be customized to suit your business needs in the following ways:

- Individual field names and values can be changed. These fields and their workflow interactions are contained and defined by a request type that can be altered in the Mercury IT Governance Workbench. See [Chapter 3, Configuring Project Details Tab Fields, on page 21](#), for more detailed information.
- Fields themselves can be configured to be hidden, visible, or read-only depending on what stage has been reached in the project process.

The project process, which is driven by the workflow discussed in [Chapter 4, Configuring the Project Process, on page 27](#), can also be changed; for example, security on each workflow step can be configured to suit your business needs. See Chapter 4 for details on configuring the underlying project process.

Mercury Project Management includes specialized project control items that can be submitted and resolved during project execution as Mercury Demand Management™ requests:

- Issues can be filed against a particular project to raise issues that require attention.
- Risks can be brought up to highlight risks that may endanger project execution.
- Scope changes can be requested to adjust the scope of the project.

Once submitted, these requests follow their own workflows to resolution. Each request type and its workflow are delivered as best-practice content ready for you to use, but if you want to change them, they can be customized to match your project control processes. The following project control request aspects can be changed to suit your business needs:

- Individual fields and possible values can be changed.
- Fields themselves can be configured to be hidden, visible, or read-only depending on what stage has been reached in the workflow.
- The workflows can be changed, including workflow structure and security settings for each step.

For detailed discussion of these project control request types and workflow configuration, see [Chapter 5, *Configuring Project Control Processes*, on page 31](#).

Work plans organize the specific tasks or deliverables for a project into a hierarchical structure. Mercury Project Management provides scalability for viewing work plans of different sizes by providing a mechanism for controlling the number of tasks displayed at any given time. In this way, larger work plans are divided into “pages” that display sets of tasks. Users can choose from a set of options in their profiles how large they want a work plan page to be. [Chapter 2, *Key Server Parameters*, on page 13](#), explains how to configure the available options, as well as settings related to:

- Cost calculation roll-up
- Microsoft Project integration

Mercury Project Management also includes task user data, custom fields that can be associated with every task on a work plan. If you have no need of custom fields for tasks on your work plans, then you do not need to configure task user data. [Chapter 6, *Configuring Task User Data*, on page 41](#), explains task user data configuration.

Specific features of Mercury Project Management relating to work plan page size, cost calculation roll-up, or Microsoft Project integration can be configured by modifying the `server.conf` file on the Mercury IT Governance Center Server. [Chapter 2, *Key Server Parameters*, on page 13](#), contains details on these features and their controls.

Related Documents

The following documents provide information related to using and configuring Mercury Project Management:

- *Mercury Project Management User's Guide*
- *Mercury Demand Management Configuration Guide*



Chapter
2

Key Server Parameters

In This Chapter:

- *Overview*
 - *Work Plan Page Size Controls*
 - *Cost Calculation Settings*
 - *Microsoft Project Integration Options*
 - *Enabling Microsoft Project Launch from a Work Plan*
 - *Mapping Work Plans to Microsoft Project Files*
-

Overview

Several important features of Mercury Project Management are controlled by parameters in the `server.conf` file on the Mercury IT Governance Server. Changing the values of these parameters can alter the way these features work. This chapter explains the `server.conf` parameters for Mercury Project Management, along with their default values.

For more detailed information on configuring the `server.conf` file, see the *System Administration Guide and Reference*.

Work Plan Page Size Controls

The Work Plan page displays a set number of tasks at a time, referred to as a “page.” You can navigate between pages in a large work plan by using the **Prev** and **Next** buttons or by entering a task number in **Seq #** and clicking **Go**.

Users can adjust the number of rows per work plan page in the **Project Work Plan Preferences** section of the Edit My Profile page, accessed by selecting **Administration > Edit My Profile** from the menu bar.

Figure 2-1. Edit My Profile page

The screenshot shows the 'Edit My Profile' page with several sections. The 'Project Work Plan Preferences' section is highlighted and contains the following content:

Project Work Plan Preferences

The number of tasks displayed per page in the project work plan can be configured here.

- 20 tasks per page.
- 100 tasks per page.
- Tasks per page (max allowed = 500).

Below this section is the 'Cost Display' section with the following content:

Cost Display

I prefer to see Costs displayed in the:

- Base Currency: United States Dollar (USD)
- Local Currency

A 'Done' button is located at the bottom right of the page.

These options are controlled by the `server.conf` parameters described in [Table 2-1](#).

Table 2-1. server.conf parameters for work plan page size controls

Parameter	Description	Default Value
LOW_PAGE_SIZE	The number of work plan lines to load per page when the user is using a slow connection, such as a WAN. This is presented to the user as a selection option. Possible values: Any whole number	20
HIGH_PAGE_SIZE	The number of work plan lines to load per page when the user is using a fast connection, such as a LAN. Possible values: Any whole number	100
DEFAULT_PAGE_SIZE_OPTION	This is the default setting for all new users, and indicates whether to use the fast setting or the slow setting (rather than indicating a specific size). <ul style="list-style-type: none"> ■ Companies with mostly LAN users should set this to use the fast setting. ■ Companies with mostly WAN/VPN users or highly mixed usage should set this to use the slower setting. Possible values: Any whole number	LOW_PAGE_SIZE
MAX_PAGE_SIZE	The maximum number of work plan lines that can be loaded into the Work Plan page, at a given time. The user can set their own page size up to this value (higher values are ignored). Possible values: Any whole number	500
DEFAULT_PAGE_SIZE	The default number of work plan lines to load per page. Possible values: Any whole number	50

Cost Calculation Settings

Cost data that involves roll-ups from other sources is recalculated system-wide on a periodic basis. These types of cost data can include the following possible scenarios:

- Work plan tasks roll up planned and actual cost data to summary tasks
- Work plan actual cost data rolls up to the project budget
- Project budget actual cost data rolls up to the program budget

Since these roll-up calculations are performed periodically, cost data for one entity may not match its dependent entity until the next calculation interval.

Figure 2-2. Project budget with automatic roll-up from work plan

View Project Plan Budget: ERP Upgrade

[Modify Budget](#) [Configure Access](#) [Done](#)

Project Plan Budget Information

Status: Approved Active: Yes

Name: ERP Upgrade
 Created On: July 27, 2006 Created By: Joseph Banks

Description:
 This Budget is for **Project - ERP Upgrade**; actuals are **automatically rolled up**. This Budget does not roll up. This Budget occurs in **Region - MercuryUS**; Cost are entered in **United States Dollar**. This Budget has capitalized costs.

Start Period: January 2006 Finish Period: December 2006

Project Plan Budget Summary

Planned Budget		Actual Budget	
Total Planned Capital	\$1,585,120	Total Actual Capital	\$0
Total Planned Operating	\$44,360	Total Actual Operating	\$814,560
Total Planned Budget:	\$1,629,480	Total Actual Budget:	\$814,560

Project Plan Budget Breakdown

Budget Status: Approved Show: [Plan Only](#) | [Plan and Actuals](#) View Lines In: [Months](#) | [Quarters](#) Display Costs in: [United States Dollar](#) | [United States Dollar](#)

Breakdown from January 2006 to December 2006 (Numbers in Table in 000s)

	2006							
	Q1 06		Q2 06		Q3 06		Q4 06	
	Plan	Act	Plan	Act	Plan	Act	Plan	Act
Capital								
Contractor Labor	151		154		151		151	
Employee Labor	121		154		201		223	
Hardware Non-Labor	80							
Software Non-Labor	200							
Capital Total	\$552	\$0	\$307	\$0	\$352	\$0	\$374	\$0
Operating								
Employee Labor	8		8		8		8	
Training Non-Labor							14	
Operating Total	\$8	\$0	\$8	\$754	\$8	\$60	\$22	\$0
Quarter Total	\$560	\$0	\$315	\$754	\$359	\$60	\$395	\$0
Year Total					Plan: \$1,629	Actual: \$815		

Notes
 Currently there are no notes.

[Modify Budget](#) [Configure Access](#) [Done](#)

Periodic cost roll-up is performed system-wide and is governed by the `server.conf` parameters described in [Table 2-2](#).

Table 2-2. server.conf parameters for periodic cost calculations

Parameter	Description	Default Value
ENABLE_COST_ROLLUP_SERVICE	Determines whether periodic cost roll-up calculations are performed. Possible values: TRUE or FALSE	TRUE
COST_ROLLUP_INTERVAL_MINUTES	Determines the frequency with which the roll-up calculations are performed, in minutes. Possible values: Any whole number	5
ENABLE_FX_RATE_UPDATE_SERVICE	Determines whether financial exchange rates are recalculated after updates are made to them. Possible values: TRUE or FALSE	TRUE
FX_RULE_UPDATE_SERVICE_INTERVAL	Determines the frequency with which financial exchange rate rules are checked for updates and costs recalculated, in minutes. Possible values: Any whole number	60
ENABLE_COST_RATE_RULE_UPDATE_SERVICE	Determines whether costs are recalculated after updates are made to cost rate rules. Possible values: TRUE or FALSE	TRUE
COST_RATE_RULE_UPDATE_INTERVAL_MINUTES	Determines the frequency with which cost rate rules are checked for updates and costs recalculated, in minutes. Possible values: Any whole number	60

Periodic roll-up of other information is also performed system-wide:

- Roll-up of task information to summary tasks is deferred when resources enter task actuals through the My Tasks portlet or time sheets.
- Calculation of schedule exceptions and schedule health for work plans is deferred when resources enter task actuals, or when work plan schedule information is updated through Microsoft Project.

These calculations are governed by the `server.conf` parameters described in [Table 2-3](#).

Table 2-3. server.conf parameters for work plan information

Parameter	Description	Default Value
ENABLE_TASK_ACTUAL_ROLLUP_SERVICE	Determines whether periodic task actual roll-up calculations are performed. Possible values: TRUE or FALSE	TRUE
TASK_ACTUAL_ROLLUP_INTERVAL	Determines the frequency with which the task actual roll-up calculations are performed, in minutes. Possible values: Any whole number	250
EXCEPTION_ENGINE_INTERVAL	Determines whether task exceptions are recalculated. Possible values: TRUE or FALSE	TRUE
SCHEDULER_INTERVAL	Determines the frequency with which work plans schedule health is recalculated. Possible values: Any whole number	60

Microsoft Project Integration Options

There are two `server.conf` parameters that are important for the following aspects of Microsoft Project integration:

- *Enabling Microsoft Project Launch from a Work Plan*
- *Mapping Work Plans to Microsoft Project Files*

Enabling Microsoft Project Launch from a Work Plan

When viewing or editing a work plan that has been integrated with Microsoft Project in Mercury Project Management, clicking **Actions** in the Work Plan page and selecting **Open Work Plan in Microsoft Project** launches Microsoft Project and opens the associated Microsoft Project file. In order for this action to be successful, the following conditions must be satisfied:

- The user must be using Microsoft Internet Explorer 6.0 (SP2)
- ActiveX must be enabled
- The `server.conf` parameter `ENABLE_PROJECT_LAUNCH_FROM_ACTION_MENU` must be set to `True`



Note

The **Open Work Plan in Microsoft Project** option is not enabled for Mozilla Firefox regardless of this setting because ActiveX is not supported for Firefox.

Depending on your company's client software security standards, use of ActiveX may be restricted. This `server.conf` parameter enables you to control whether or not users can launch Microsoft Project from within a Project Management work plan.

Mapping Work Plans to Microsoft Project Files

All projects in Mercury Project Management that are integrated with Microsoft Project must store a link to the project in the Microsoft Project file. This link must be contained in a custom field in Microsoft Project that remains consistent and untouched across all projects. The `server.conf` parameter `MSP_PROJECT_CUSTOM_FIELD` stores the Microsoft Project field where the project link information is kept. Its default value is `Text30`.



Note

This parameter is a system-level setting and must not be changed after you have begun work with projects that are integrated with Microsoft Project.

Chapter

3

Configuring Project Details Tab Fields

In This Chapter:

- *Overview of Configuring Project Details Tab Fields*
 - *Project Details Tab Fields*
 - *Configuring Project Details Tab Fields*
-

Overview of Configuring Project Details Tab Fields

This chapter provides details on the fields in the **Project Details** tab of the Project Overview page, and how to modify them to suit your business needs, if desired.

Project Details Tab Fields

The **Project Details** tab of the Project Overview page contains fields delivered ready to use for projects. These fields and their workflow interactions are contained and defined by a request type that can be altered in the Mercury IT Governance Workbench.

- If you have not installed Mercury Portfolio Management™, the request type delivered by default is called “Project Details” and is specified in the default project type. Its fields are described in *Table 3-1*.
- If you have installed Mercury Portfolio Management, another request type is provided called “PFM - Project”. Its fields are shown in *Figure 3-1* and discussed in the “Customizing Mercury Portfolio Management Entities” chapter of the *Mercury Portfolio Management Configuration Guide*.

Figure 3-1. Project Overview page: Details tab

Project: ERP Upgrade ■ Yellow 65%

Project Status: In QA
 Project Manager: Teju Krishna, Joseph Banks
 Project Plan Period: January 2006 to December 2006 Project Region: MercuryUS

Project Settings | **Configure Participants**

Project Summary | Project Exceptions | Project Details | References

[Printable Version](#)

Descriptions:
 Request Status: In QA ([View Full Status Below](#))

Available Actions

Test: Approved Rejected

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

Header

Summary

Project No.: 30018 Created By: Carolyn Sayer

Driving Process: PFM - Project

Business Unit: Status: In QA

Description:

Project Dependencies:

Details

Project Details

Project Name: Project Class:

Project Health: Yellow Asset Class:

Business Objective:

Project Manager: Project Sponsor:

Actual Start Date: Actual Complete Date:

Planned Start Period: Planned Finish Period:

Business Case Details

Budget: Financial Benefit: [Detach](#) Staffing Profile:

Return on Investment: Value Rating: Risk Rating:

Score Adjustment: Total Score:

Business Case Doc: [Add](#)

Requirements Doc: [Add](#)

Value Ratings

Internal Rate of Return:

Strategic Match:

Competitive Advantage:

Competitive Responses:

Productivity:

Risk Ratings

Organization Risk:

Technical Risk:

Architecture Risk:

Definition Risk:

Infrastructure Risk:

Notes

Notes to be added on save:

Status

[Save](#)

Table 3-1. Default project fields

Field Name	Description
Summary section	
Project Name	The name of the project. This field should be made visible and editable if you want users to be able to change the project name.
Project Manager	The manager of the project. This field can be made editable, but it is recommended that it be made display-only, and that project managers be defined using the project's Configure Participants page.
Project Status	The status of the project. This field should not be altered.
Project Health	The overall health of the project. This field should not be altered.
Planned Start Period	The planned start date for the project. This field should not be altered.
Planned Finish Period	The planned finish date for the project. This field should not be altered.
Details section, Project Details subsection	
Business Unit	The business unit from which this project originated.
Project Dependencies	Any dependencies the project has.
Budget	The budget for the project. This field is read-only and should not be altered, as the budget can be accessed from the Project Summary tab of the Project Overview page.
Staffing Profile	The resource demand of the project. This field is read-only and should not be altered, as the staffing profile can be accessed from the Project Summary tab of the Project Overview page..
Financial Benefit	The monetary benefit the project provides.
Net Present Value	If enabled, the NPV for the project. (For a definition, see the <i>Mercury Portfolio Management Configuration Guide</i> .)
Project	A hidden field that should not be altered.

Configuring Project Details Tab Fields

The fields on the **Project Details** tab do not need to be set up or altered in any way before you start using Mercury Project Management, but if you want to change them, they can be customized to suit your business needs in the following ways:

- Viewing and editing security on certain fields can be altered.
- Certain individual field names and values can be changed.
- Fields themselves can be configured to be hidden, visible, or read-only depending on what stage has been reached in the project process, which is driven by the workflow discussed in [Chapter 4, *Configuring the Project Process*, on page 27](#).

- New fields can be added to capture any information not already covered.

These fields and their workflow interactions are contained and defined by a request type that can be altered in the Mercury IT Governance Workbench.

- If you have not installed Mercury Portfolio Management, the request type delivered by default is called “Project Details” and is specified in the default project type
- If you have installed Mercury Portfolio Management, another request type is provided called “PFM - Project”
- If you choose to configure your own request type to define the **Project Details** tab, you must include the “PFM Project” field group in the request header type. For more details on field groups and request header types, see the *Mercury Demand Management Configuration Guide*.

If you want to add other lifecycle and planning information to the project, Mercury recommends that you create a new section in the request type and add the new fields there.

For general recommendations on altering this request type in the context of Mercury Portfolio Management, see the “Customizing Mercury Portfolio Management Entities” chapter of the *Mercury Portfolio Management Configuration Guide*.

User access to these request types should be carefully considered. The **User Access** tab of the Request Type window defines user access to the request type, which in turn defines the list of users who can participate in the project process. These project process participants can see all the projects whose **Project Details** tab is governed by that request type.

For more detailed information on creating and modifying request type fields, see the *Mercury Demand Management Configuration Guide*.

Chapter

4

Configuring the Project Process

In This Chapter:

- *Overview of Configuring the Project Process*
 - *Project Process*
 - *Configuring the Project Process*
-

Overview of Configuring the Project Process

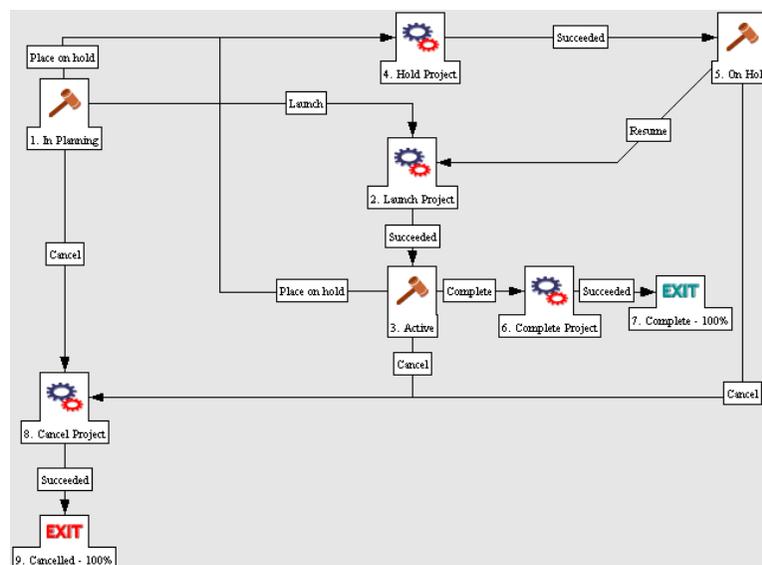
This chapter provides details on the workflow associated with the request type used to define the **Project Details** tab, which determines the project process, and how to modify this workflow to suit your business needs, if desired. The workflow provided by default models a very simple lifecycle.

Project Process

The project process is determined by a workflow in Mercury IT Governance Center™. The workflow is associated with the request type that defines the fields in the **Project Details** tab in the Project Overview page.

- The “Project Process” workflow is delivered by default, and presents the high-level stages of a project being implemented. Steps are updated manually, either by the project manager to signal the completion of a stage, or by approvers who verify that the stage is complete. The project workflow is shown in *Figure 4-1* and described below.
- If you have installed Mercury Portfolio Management, a different workflow is used which also defines the process for projects in your portfolio. This workflow is discussed in the *Mercury Portfolio Management Configuration Guide*.

Figure 4-1. Project process



The default workflow steps are described as follows:

1. **In Planning.** The project is being planned.
2. **Active.** The project is in its execution phase.
3. **On Hold.** The project is on hold. This step can be reached from the “Active” or “In Planning” steps, but is not necessary.
4. **Complete.** The project is complete.

Configuring the Project Process

The project workflow is delivered as best-practice content ready for you to use in Mercury Project Management, but if you want to change it, it can be customized to match your general project execution process.

- If you have not installed Mercury Portfolio Management, the workflow is called “Project Process.”
- If you have installed Mercury Portfolio Management, the workflow is called “PFM - Project.”

Steps in the workflow can also be configured to integrate with fields on the **Project Details** tab, determining whether they are visible or editable.

Consider the following when making changes to the project workflow:

- You might want to significantly change the project workflow to represent the major project phases at your company. You need to make sure the request statuses are updated to be consistent with any project workflow changes.
- You can also add steps, change step names, and modify notifications, although Mercury recommends that the project stages be tracked at a high level, totaling under fifteen steps; they are not meant to emulate a detailed work plan.
- The automated workflow steps included in the “Project Process” workflow are used to control the internal status of the project, as well as the statuses of the budget, staffing profile, and financial benefit associated with the project. These automated steps should be included in your workflow to take full advantage of Mercury Project Management functionality.

- If you have installed Mercury Portfolio Management, the “Complete Project” and “Create Asset” steps should be retained in the final workflow to take full advantage of Mercury Portfolio Management functionality.
- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. Review the security for each workflow step to ensure that it is sufficient for your organization.

For general recommendations on altering this workflow in the context of Mercury Portfolio Management, see the “Customizing Mercury Portfolio Management Processes” chapter of the *Mercury Portfolio Management Configuration Guide*.

For more detailed information on modifying workflows, see the *Mercury Demand Management Configuration Guide*.

Chapter

5

Configuring Project Control Processes

In This Chapter:

- *Overview of Configuring Project Control Processes*
 - *Configuring Project Control Entities*
 - *Project Issue Request Type*
 - *Risk Request Type*
 - *Scope Change Request Type*
 - *Configuring the Project Control Entities*
 - *Configuring Project Control Processes*
 - *Project Issue Workflow*
 - *Risk Workflow*
 - *Scope Change Workflow*
 - *Configuring the Project Control Workflows*
-

Overview of Configuring Project Control Processes

This chapter provides details on:

- The following project control entities delivered with Mercury Project Management and how to modify their fields and their behavior to suit your business needs, if desired:
 - Project issues
 - Risks
 - Scope changes
- The processes associated with the project control entities, and how to modify them to suit your business needs, if desired.

Configuring Project Control Entities

Mercury Project Management delivers pre-defined project control request types that can be used without additional configuration. If desired, these request types can be altered to suit your business needs. It is recommended that you review the security settings for these request types at a minimum, to ensure that they are sufficient for your organization.

Project Issue Request Type

Mercury Project Management delivers a pre-configured project issue request type called “Project Issue” that can be used without additional configuration to log project-level issues. If you have installed Mercury Program Management™, a separate but similar “Program Issue” request type is delivered for use at the program level.

The project issue request type’s fields are described in *Table 5-1*.

Table 5-1. Project issue fields (page 1 of 2)

Field Name	Description
Header Section: Summary	
Issue Status	The status of the issue.
Created By	The user who created the issue.

Table 5-1. Project issue fields (page 2 of 2)

Field Name	Description
Assigned To	The user to whom the issue is assigned.
Project	The project associated with the issue.
Priority	The priority of the issue. Values in this field are linked to the issue health of a project, configured in the Issue Health policy. See the “Configuring Project Types” chapter of the <i>Mercury Project Management User’s Guide</i> for more detailed information.
Escalation Level	The escalation level of the issue. Possible values are Project or Program . If there are program(s) associated with the project, escalating to the Program level will make the issue visible at the program level. If you are not using programs, you may want to hide this field.
Description	A brief description of the issue.
Details Section: Issue Details	
Date Identified	The date the issue was identified.
Due Date	The date by which the issue should be resolved.
Issue Type	The type of issue being raised.
Detailed Description	A detailed description of the issue.
Proposed Solution	The proposed solution for the issue.
Business Function	The business function that is affected by the issue.

Risk Request Type

Mercury Project Management delivers a pre-configured risk request type called “Project Risk” that can be used without additional configuration to log project-level risks. If the project is associated with any programs, risks will be displayed at the program level based on the settings for that program.

The risk request type’s fields are described in *Table 5-2*.

Table 5-2. Risk fields

Field Name	Description
Header Section: Summary	
Risk Status	The status of the risk.
Created By	The user who created the risk.
Assigned To	The user to whom the risk is assigned.
Project	The project associated with the risk.
Priority	The priority of the risk.
Risk Impact Level	The impact level of the risk.
Probability	The probability of the risk occurring.
Description	A brief description of the risk.
Details Section: Risk Details	
Risk Type	The type of risk being raised.
Date Identified	The date the risk was identified.
Detailed Description	A detailed description of the risk.
Closure Criteria	The criteria for successfully closing the risk.
Action Plan	The proposed plan of action for dealing with the risk.

Scope Change Request Type

Mercury Project Management delivers a pre-configured scope change request type called “Project Scope Change Request” that can be used without additional configuration to request changes in project scope. If the project is associated with any programs, scope changes will be displayed at the program level based on the settings for that program.

The scope change request type’s fields are described in *Table 5-3*.

Table 5-3. Scope change request fields

Field Name	Description
Header Section: Summary	
Scope Change Status	The status of the scope change.
Created By	The user who created the scope change.
Assigned To	The user to whom the scope change is assigned.
Project	The project associated with the scope change.
Priority	The priority of the scope change.
CR Level	A ranking of the impact or importance of the scope change.
Business Impact Severity	The severity of the scope change's impact on the business.
Description	A brief description of the scope change.
Details Section: Scope Change Details	
Assigned Release	The release to which the scope change is assigned.
Target Implementation Date	The date by which the scope change should be implemented.
Detailed Description	A detailed description of the scope change.
Benefit of Proposed Change	The benefit the proposed scope change would have.
Alternatives	Any alternatives to the scope change that exist.
List of Impacted Deliverables	A list of the deliverables impacted by the scope change.
Impact Summary	A summary of the impact the scope change will have.
Financial Impact	The dollar amount of the scope change's impact.
Schedule Impact (in days)	The number of days by which the scope change affects the schedule.

Configuring the Project Control Entities

The project control entities do not need to be set up or altered in any way before you start using Mercury Project Management, but if you want to change them, they can be customized to suit your business needs in the following ways:

- Viewing and editing security on certain fields can be altered.
- Individual field names and values can be changed.
- Fields themselves can be configured to be hidden, visible, or read-only depending on what stage has been reached in each project control process, which are driven by the workflows discussed in *Configuring Project Control Processes*.
- New fields can be added.

If you choose to configure your own project control request types, you must include one of the following field groups in the request header type:

- Project Issue
- Project Risk
- Project Scope Change

For more details on field groups and request header types, see the *Mercury Demand Management Configuration Guide*.

For more detailed information on creating and modifying request type fields, see the *Mercury Demand Management Configuration Guide*.

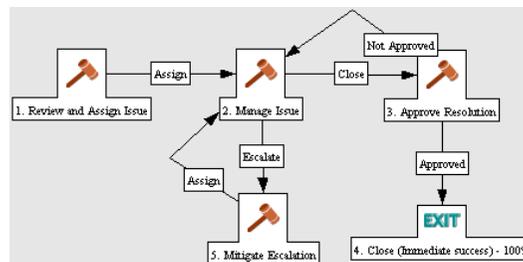
Configuring Project Control Processes

The project control processes are defined by the workflows delivered by Mercury Project Management, which can be used without additional configuration. If desired, the workflows can be altered to suit your business needs.

Project Issue Workflow

The project issue process is determined by the workflow called “Issue Management Process” in Mercury IT Governance Center. The workflow is associated with the project issue request type. If you have installed Mercury Program Management, the program issue request type also uses this workflow. The issue management workflow is shown in *Figure 5-1* and described below.

Figure 5-1. Issue management workflow



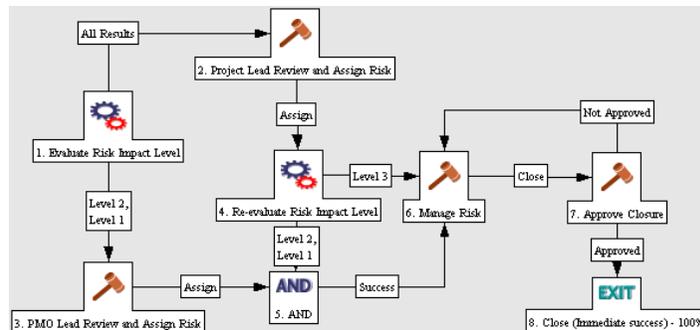
The default workflow steps are described as follows:

1. **Review and Assign Issue.** The issue is reviewed and assigned to the appropriate user.
2. **Manage Issue.** The issue is resolved.
3. **Approve Resolution.** The resolution to the issue is reviewed.
4. **Close.** The issue is closed.

Risk Workflow

The risk process is determined by the workflow called “Risk Management Process” in Mercury IT Governance Center. The workflow is associated with the risk request type. The risk management workflow is shown in *Figure 5-2* and described below.

Figure 5-2. Risk management workflow



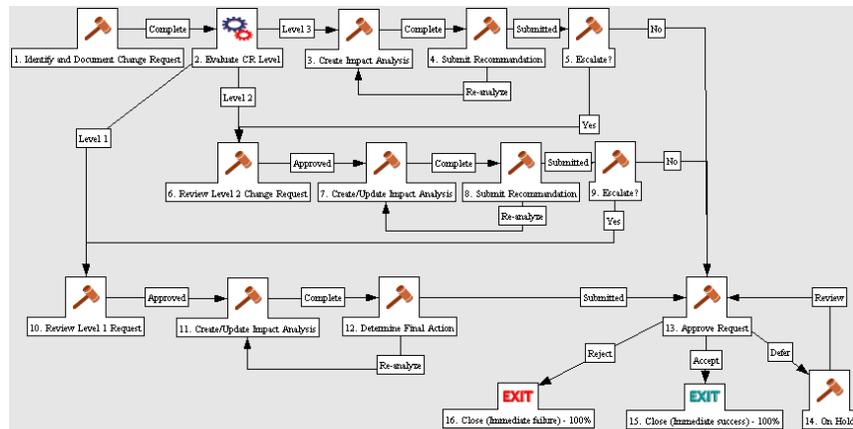
The default workflow steps are described as follows:

1. **Evaluate Risk Impact Level.** The risk’s impact is evaluated.
2. **PMO Lead Review and Assign Risk.** The risk is reviewed by the Program Management Office and assigned to the appropriate user.
3. **Project Lead Review and Assign Risk.** The risk is reviewed by the project lead and assigned to the appropriate user.
4. **Manage Risk.** The risk is resolved.
5. **Approve Closure.** The resolution to the risk is reviewed.
6. **Close.** The risk is closed.

Scope Change Workflow

The scope change process is determined by the workflow called “Scope Change Request Process” in Mercury IT Governance Center. The workflow is associated with the scope change request type. The scope change request workflow is shown in *Figure 5-3* and described below.

Figure 5-3. Scope change request workflow



The default workflow steps are described as follows:

1. **Identify and Document Change Request.** The initiator builds a case for the change and sets the change request level.
2. **Evaluate CR Level.** The scope change’s impact is evaluated. Depending on the level, the scope change is routed to a different branch of the workflow, each of which includes steps to create or update an impact analysis of the scope change. This ensures that decisions regarding the scope change are well-founded.
3. **Create/Update Impact Analysis.** Once the impact analysis has been created and updated, the scope change is analyzed and a recommendation issued. Often this will be the selection of a specific option or a recommendation not to pursue.
4. **Submit Recommendation.** The scope change is either submitted for approval or escalated for additional analysis.
5. **Approve Request.** The scope change may be rejected, deferred, or accepted. Usually a change control board issues the final approval.
6. **Close.** The scope change is closed.

Configuring the Project Control Workflows

The project control workflows are delivered as best-practice content ready for you to use in Mercury Project Management, but if you want to change them, they can be customized to match your project control processes. Steps in the workflow can also be configured to integrate with fields on the project control request types, determining whether they are visible or editable.

Consider the following when making changes to the project control workflows:

- You need to make sure the request statuses are updated to be consistent with any project control workflow changes.
- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it.

For more detailed information on modifying workflows, see the *Mercury Demand Management Configuration Guide*.

Chapter

6

Configuring Task User Data

In This Chapter:

- *Configuring User Data*
-

Configuring User Data

User data is the set of custom fields that can be defined for various Project Management entities. User data fields can be used to capture data not covered by the default project/task information fields, such as a cross-listing of the task to a specific process or deliverable identifier when coordinating with major vendor implementation methodologies. These fields are accessed through the **User Data** tab in the Task Details page. Required user data is enforced when the Task Details page is opened. If no user data has been defined for a particular entity, the tab does not appear. Field-level security configured for task user data is not enforced.

User data fields are configured in the Mercury IT Governance Workbench.

1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Configuration > User Data**.

The User Data Workbench window opens.

3. Select **Task User Data** from the **User Data Type** drop-down list.
4. Click **List**.

The **Results** tab opens with the task user data type loaded.

5. Select the task user data and click **Open**.

The User Data Context: Task User Data window opens.

6. Click **New**.

The Field: New window opens.

7. Configure the new field as desired.

For more information on configuring fields and validations, see the *Commands, Tokens, and Validations Guide and Reference*.

A

ActiveX

 Mozilla Firefox issue 19

C

configuring

 project control entities 32

 project details tab 22

 project issue 32

 project issue workflow 37

 project lifecycle 28

 project workflow 28

 risk 34

 risk workflow 38

 scope change 34

 scope change workflow 39

 task user data 42

I

introduction to project management 10

M

Microsoft Project

 Mozilla Firefox issue 19

Mozilla Firefox

 ActiveX issue 19

Microsoft Project integration issue 19

P

project control entities 32

 configuring 36

 configuring lifecycle 40

 configuring workflow 40

 lifecycles 37

 project issue 32

 risk 34

 scope change 34

 workflows 37

project details tab

 configuring fields 21, 25

 fields 22

project issue

 request type 32

 workflow 37

project lifecycle 28

 configuring 29

project workflow 28

 configuring 29

R

risk

 request type 34

workflow 38

S

scope change

request type 34

workflow 39

T

tasks

configuring user data 42

U

user data

configuring 42

workbench 42