HP Center Management for Quality Center

Software Version: 1.0

User and Configuration Guide

Document Release Date: June 2007
Software Release Date: June 2007

Legal Notices

Documentation Updates

This manual's title page contains the following identifying information:

o   Software version number, which indicates the software version

o   Document release date, which changes each time the document is updated

o   Software release date, which indicates the release date of this version of the software

To check for recent updates, or to verify that you are using the most recent edition of a document, go to: http://ovweb.external.hp.com/lpe/doc_serv/.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Support

Mercury Product Support

You can obtain support information for products formerly produced by Mercury as follows:

o   If you work with an HP Software Services Integrator (SVI) partner (www.hp.com/ managementsoftware/svi_partner_list), contact your SVI agent.

o   If you have an active HP Software support contract, visit the HP Software Support site and use the Self-Solve Knowledge Search to find answers to technical questions.

o   For the latest information about support processes and tools available for products formerly produced by Mercury, we encourage you to visit the HP-Mercury Software Support web site at: support.mercury.com.

o   Contact your HP Sales Representative if you have additional questions.

HP Software Support

You can visit the HP Software Support web site at www.hp.com/managementsoftware/services.

HP Software online support provides an efficient way to access interactive technical support tools. As a valued support customer, you can benefit by using the support site to:

o   Search for knowledge documents of interest

o   Submit and track support cases and enhancement requests

o   Download software patches

o   Manage support contracts

o   Look up HP support contacts

o   Review information about available services

o   Enter into discussions with other software customers

o   Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To find more information about access levels, go to: www.hp.com/ managementsoftware/access_level.

To register for an HP Passport ID, go to: www.managementsoftware.hp.com/passport-registration.html.

Table of Contents

About This Document

HP Center Management for Quality Center built on Mercury IT Governance Center™, provides best-practice content to help you start and maintain a Quality Center of Excellence (CoE).

This document describes HP Center Management for QC. The chapters address the following topics:

- Chapter 1, Introduction to HP Center Management for QC, on page 8 includes an overview of business-centric application delivery and an introduction to HP Center Management for QC.

- Chapter 2, Installing HP Center Management for QC, on page 19 details the system requirements and installation procedure for HP Center Management for QC.

- Chapter 3, Setting up HP Center Management for QC on page 26 discusses the initial setup tasks that must be completed before using HP Center Management for QC.

- Chapter 4, Configuring Users and User Groups, on page 30 provides instructions on setting up user accounts and security groups, as well as role-based Dashboard module distribution.

- Chapter 5, Initiating Application Project Request, on page 44 discusses how an organization can ensure successful business outcomes by incorporating quality steps into the application delivery process.

- Chapter 6, Initiating Testing Project Requests, on page 56 discusses using ITG to manage testing project plans, resources, progress and status.

- Chapter 7, Creating and Managing Project Plans, on page 68 provides details on working with project plans, assigning and managing resources and tracking project activity.

- Chapter 8, Initiating Project and Test Status Report Requests, on page 72 discusses best practices in initiating project and test status reports for a project.

- Chapter 9, Viewing and Tracking Project Progress and Quality, on page 83 reviews the pre-built Dashboard portlets that provide visibility into the project progress and quality status.

- Chapter 10, Training Center of Excellence Personnel, on page 107 discusses building certification courses, making training and certification requests and publishing knowledge base articles for the CoE personnel.

- Chapter 11, Managing Quality CoE Administrative Activity, on page 120 details handling of various types of administrative tasks – including registering a CA instance, filing an IT service request and handling support requests.

Who Should Read This Document

This document is for the following audience types and assumes that the reader has the basic understanding of HP Quality Center™, as well as concepts related to application quality processes and Quality CoE operations.

- Program Manager
- Business Analyst
- Project Manager
- Developer
- Development Manager
- QA Manager
- QA Project Lead
- QA Tester
- QA Engineer
- Certification Manager
- Trainer
- CoE Support Engineer
- CoE Administrative Manager
- QC Administrator
- ITG Administrator
- System Administrator

Related Documents

HP Center Management for QC uses the software and features of Mercury IT Governance Center. Documents within the IT Governance suite that provide relevant information include:

- System Administration Guide and Reference
- Security Model Guide and Reference
- Commands, Tokens, and Validations Guide and Reference
- Mercury Demand Management: Configuring a Request Resolution System
- Mercury Time Management Configuration Guide
- Mercury Demand Management User's Guide
- Mercury Project Management User's Guide
- Mercury Time Management User's Guide

Documents for end users associated with CoE and CoE customer business roles include:

- Mercury Demand Management User's Guide
- Mercury Project Management User's Guide
- Mercury Time Management User's Guide

Supplemental documentation includes:

- Mercury Resource Management User's Guide
- Mercury Financial Management User's Guide

For information about these documents and how to access them, see the Guide to Documentation.

Chapter 1
Introduction to HP Center Management for Quality Center

In This Chapter:

1.1. Business-Centric Application Delivery

The role of IT has changed from enabling the business to effectively becoming the business. Many IT organizations are in the process of evolving into profit centers. As a result, IT is taking responsibility for producing fast, cost-effective, reliable business results.

In a similar vein, the role of business applications has evolved to be instrumental in creating a sustainable competitive advantage for the business. How quickly IT adds or enhances services on critical applications can be the difference between sustaining and losing a customer. That's why optimizing application quality while still in pre-production has become so critical to the viability of the business.

At most companies today the application delivery process is a series of discrete tasks — from requirements generation, to coding, unit and functional testing, performance tuning, and so on. Typically, each task or phase of the application lifecycle is the exclusive domain of specialists. Each team of specialists does its job and hands it off to the next team. The assumption is that if each team performs its task correctly, the end result will be a high-quality application that meets business and end-user requirements.

All too often, that assumption proves wrong. With each team focused on its job, not the overall business objectives, original requirements often get confused with the tactical development and testing goals. As a result, the final application delivered into production doesn't always address current business goals or match end-user needs. When teams don't communicate and share best practices, a lot of expertise, data and knowledge is wasted, and operational efficiencies across the organization are lost.

And because data is not standardized or shared, application delivery teams often find themselves in reactive mode, diagnosing and troubleshooting problems — which leads to added expense and delays. Problems need to be identified when there is time in the process to address them, and at the most cost-efficient point in the cycle.

Few IT executives today would dispute that business success depends on IT-enabled business processes. Yet few companies manage the quality, performance, and availability of their applications from a business perspective. They deliver applications as they always have.

A new approach is called business-centric application delivery. It focuses on the business objectives, business value, and business processes rather than just QA tasks, tools, and technologies. Successful IT organizations — those that maintain a competitive edge — seize the initiative and take charge of business outcomes. QA groups that are centralizing and consolidating expertise — and making it available to all application groups — are driving quality as a strategic pillar in application delivery.

1.2. Quality Center of Excellence (CoE)

Application delivery is a complex process that includes development, testing, and fine-tuning that must be performed before production deployment.

In order to optimize the delivery process and ensure successful business outcomes, many IT organizations are centralizing and consolidating QA functions and expertise. Organizations of all types and sizes are embracing the Center of Excellence (CoE) model as a practical way to consistently and continually improve their IT operations.

The CoE model is a concept that centralizes the QA infrastructure and processes without necessarily brining the QA personnel into the same physical location. A CoE is an internal organization that provides a management and automation platform for application delivery processes, as well as leadership, consulting and support services to help companies optimize application quality. It consolidates and centralizes processes and best practices to improve overall quality. A CoE also provides the entire organization with visibility into standardized quality metrics and KPIs, helping to keep everyone informed, and keeping applications aligned with business objectives.

Among the advantages of the Quality CoE model:

Efficiency: Testing labs, tools, staff, and best practices are built, used, integrated, and conveniently accessible to all project teams through one source, so there is no need to replicate expensive resources across departments or LOBs (in fact, total headcount and infrastructure could be reduced).

Redundancy: By sharing critical knowledge, your company is less dependent on one or two key employees. Application delivery can still proceed as expected if an essential employee moves on and build on the IP already developed.

Improvement: Best practices in testing processes, organization, and artifacts are collected from throughout the organization and standardized, improved, and re-distributed over the entire organization, cutting the learning curve and increasing project success rates.

Consistency: Standardizing testing applications and best practices helps ensure consistent test cycles, lowering the risk for all covered applications. Reducing the number of overall testing applications reduces costs, and increases expertise across the organization.

Alignment: The CoE model can help organizations synchronize business goals with IT priorities, resulting in better end-user services. An ecosystem consisting of an extended development team, management, users, partners, suppliers, and so on identifies any problems earlier in the development and testing cycle, while keeping everyone informed of how the application aligns with business goals.

Practicality: Building a CoE is an achievable goal. Organizations can start on a small scale, leveraging existing resources, expand its capabilities as the value is proven, and experience immediate return on investment (ROI).

1.2.1. Quality CoE Resources and Services

A Quality CoE is a quality management and automation platform. It is the organization's primary means of providing leadership for implementing consistent, standardized best practices and integrated toolsets that result in higher quality; and it makes these processes and practices easy for the organization to adopt.

Among the specific support services that can be provided by a Quality CoE:

 • Build/execute a project testing process:
      — Set up a test strategy
      — Implement quality key performance indicators (KPIs)
      — Implement test management processes
      — Define a test plan
      — Automate test execution
• Optimize existing processes:
      — Determine the ROI of automating functional testing
      — Integrate unit testing/functional testing processes
      — Measure and monitor the end-user experience
• Define and implement quality standards:
      — Quality metrics
      — Quality processes
      — Quality management and automation technologies

In addition to providing consistent processes, industry best practices, and toolsets for higher quality, the CoE model also provides a dashboard of Key Performance Indicators (KPIs), which are measurements of specific quality-related criteria. By maintaining and regularly monitoring KPIs, organizations can help keep everyone informed and keep IT and business goals aligned.

1.2.2. The Management of Quality CoE

A Quality CoE is a vehicle to align the company's business goals with the specific quality goals of the IT organization. To maximize the value a CoE delivers, it is imperative that it extends beyond QA. A centralized and standardized application delivery process needs to include many participants – from project managers to business analysts, subject-matter experts, operations teams, LOB department heads, management and even end-users.

This means that all Quality CoE practices must be tightly integrated with all other upstream and downstream application delivery processes. By increasing the communication with the LOBs and exposing their processes within the organization, the CoE can make it possible for the project teams to:

- **Understand project interdependencies** — how decisions made on one project can affect other projects. Seeing the "big picture" helps team members meet business goals, not just application goals.

- **Lower costs by creating higher-quality applications.** Application defects and other issues are fixed before deployment.

- **Distribute quality expertise around the organization** - by accelerating knowledge transfer and best practice sharing. Knowledge is shared around the organization, and stored for future projects.

- **Develop more generalized skills** while also honing expertise in areas of specialty. Sharing both specific and general knowledge raises the level of quality for applications, and of the organization.

- **Begin collecting and monitoring KPIs across the application lifecycle.** This data helps establish future quality metrics.

By giving both the LOB and Quality CoE members a "seat at the table" at the initiation of each project, and by encouraging feedback and collaboration at each stage, organizations can achieve a truly business-centric approach to application delivery.

1.3. Overview of Center Management for Quality Center

HP Center Management for QC uses the technology and features of Mercury IT Governance Center to optimize the management of Quality CoE by introducing repeatable best practices, projects, workflows and KPIs for principal quality activities.

The main functionality of the HP Center Management for QC includes:

- Introducing and enforcing consistent workflows for all major application delivery processes
- Initiating and managing application and testing projects
- Offering visibility into project and test status
- Providing Quality Center support and administration
- Gathering and analyzing customer satisfaction data
- Creating and executing training and certification programs for CoE members
- Managing the quality process knowledge base

1.3.1. Center Management for Quality Center Roles and Responsibilities

To support the core quality processes, both the Lines of Business and the Quality CoE maintain dedicated staff; toolsets and templates; as well as documentation of best practices, procedures, and techniques.

The Center Management for Quality Center divides the roles into two groups – the LOB roles including project managers, developers, QA managers, testers, etc., and the CoE roles - administrators, support engineers, trainers, etc. These roles continuously interact to provide seamless information and process flow between all groups involved into the application delivery process.
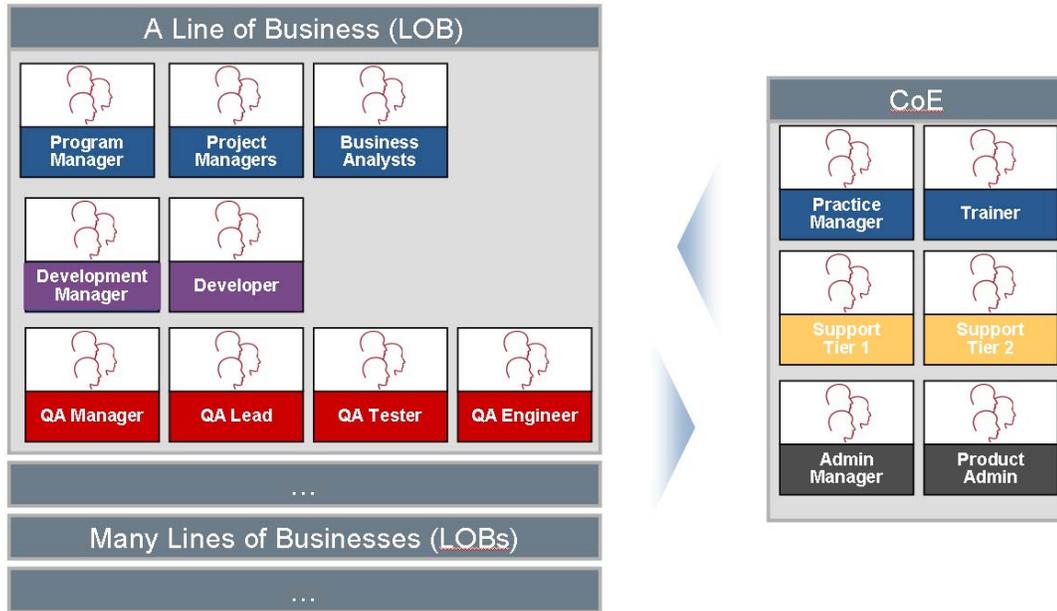
Table 1-1 provides detailed description for each role in both LOB and CoE groups.

Team	Role	Description
LOB - Project Management Team	Program Manager	Manages one or more business units and multiple projects
	Business Analyst	Manages business process mapping, provides design reviews, testing requirements, defines business processes, and reviews test scenarios and results
	Project Manager	Manages application projects and development lifecycle
LOB - Development Team	Developer	Designs and develops application and fixes defects
	Development Manager	Manages development project, assigns defects to developers, manages development priorities, analyzes defect trends and root cause
LOB - Quality Assurance Team	QA Manager	Manager of QA department (within the Line of Business)
	QA Project Lead	Performs software test planning, risk analysis, design reviews, go/no-go recommendations, test scenario reviews, etc.
	QA Tester	Executes test scenarios, verifies and reports defects
	QA Engineer	Performs testing coverage review, provides business test design, execution. Builds automated scripts. Provides code reviews and recommendations for improving automation efficiencies
CoE - Practice / Training Team	Certification Manager	Manages certification of CoE product and practice experts

	Trainer	Provides instructions for training and certification programs
CoE - Application Support Team	Support Tier-1	CoE Support: Tier 1 Support Engineer
	Support Tier-2	CoE Support: Tier 2 Support Engineer
CoE – Administration Team	Administrative Manager	Manages the CoE infrastructure and applications
	Product Administrator (QC)	Provides administration for the CoE infrastructure (e.g. Quality Center etc.)
	ITG Administrator	Provides administration for the ITG Application Server
	System Administrator	Supports networking, OS, DBA and other systems

Table 1-1. Center Management for QC roles and responsibilities

1.3.2. Capturing and Tracking Demand

Users in the LOB can use predefined request forms available through HP Center Management for QC to streamline and automate the initiation of Quality CoE projects. Requests submitted from the LOB follow a pre-configured workflow that ensures consistency, visibility and accountability at each stage of the application delivery process. CoE personnel can perform the required activities, track project status and progress and report on the quality level of any application at any point in the lifecycle.

Submitting Requests from the Line of Business

By following the specific pre-built workflow for all project requests, each request is assured to follow all required approval, review and sign-off steps by all required roles.

This functionality is an extension of the existing ITG project request process. Its workflow and layout are extended to support automatic creation and linkage between the ITG and QC projects. It follows a standard software development lifecycle (SDLC) flow. The workflow is extended to include a testing request that is assigned to a QA lead for managing the testing processes and resources, and gathering the quality metrics. The application project is managed by a project manager. A QA lead, development lead, and operations lead assist in driving the project to completion through the key phases of the development lifecycle. Figure 1-1 shows an application project request being initiated:

Create New AQM - Application Project

Expand All | Collapse All | Submit | Cancel

Header

Instructions [?]

- Use this form to provide all the information related to a Project.
- The fields with * require your input.

Summary [?]

		Status:	Not Submitted
Created By:	Jack Foster	*Priority:	Normal
Driving Process:	AQM - Application Project		

Figure 1-1. New application project request page

Incoming project initiation requests are handled by appropriate members of the Quality CoE and routed through the CoE personnel for reviews and approvals as specified in the project initiation workflow. Once the approval process is complete, the CoE manager can initiate a testing project using the quality process management functionality of HP Quality Center. Using portlets on their personalized dashboards, CoE managers can get a real-time view of proposed and in-flight testing projects and related metrics. *Figure 1-2* shows portlets that display relevant statistics for ongoing and proposed projects.

My Project Listing [?]

Preferences: Include Closed: No

Req # △	Type	Project Status	*	Proj #	Description	Project Manager	Overall Quality	Requirements Status	Testing Status	Defect Status	R	T	D	Workflow Status	Last Updated
31367	Application Project	■		31123	Mercury Tours Application v9	Peter Adams	■	□	■	■				In Development	10/26/06
31419	Application Project	□		31176	SAP Netweaver Upgrade - Wave 1	Peter Adams	■	■	■	■				Check Testing Request Status	10/17/06
31466	Application Project	■		31276	Commerce Center	Jack Foster	■	■	■	■				Configuring Project Plan	10/1/06
31487	Application Project				GPS - Global Supply Chain Tracking System	Peter Adams	■	■	■	■				Setup Project	10/3/06

Showing 1 to 4 of 4 | Prev | Next | Maximize

My Requests [?]

Req # △	Req Type	Description	Status	Assigned To	Priority	Created By
31466	AQM - Application Project	Commerce Center	Configuring ...	Jack Foster	High	Jack Foster
31487	AQM - Application Project	GPS - Global Supplly Chain Tracking S...	Setup Project	Peter Adams	Normal	Jack Foster

Showing 1 to 2 of 2 | Prev | Next | Maximize

Figure 1-2. Project tracking Dashboard portlets

1.3.3. Creating and Managing Projects

14

After a project initiation request has been approved, a CoE project manager can create a testing project using HP Center Management for QC's pre-built requests. The QA Testing Project is designed to be used by QA leads to manage the project plan, resources, progress, and key performance indicators for their testing initiatives. The testing project provides the following key capabilities:

- Managing the testing project plan and associated tasks using ITG project management capabilities
- Managing resources against project tasks with ITG resource management
- Managing test status and performance indicators. through linking ITG with QC project

The testing project may be either created on its own, or linked with an application project to combine quality metrics with the general application project status information.

The testing project follows a common testing workflow that includes designing a test plan, setting up test environment, developing detailed test plan and assets, executing tests, producing periodic test status reports, and submitting a final QA report to all application stakeholders. *Figure 1-3* shows the testing project being created.

Figure 1-3. New testing project request page

Once a project is complete, HP Center Management for QC provides the satisfaction surveys that can be sent out by the CoE for LOB user feedback.

1.3.5. HP Center Management for QC Administration Functions

A major role of the CoE revolves around administration and support activities. HP Center Management for QC includes request types and workflows supporting actions related to the administration of the CoE itself, QC and IT in general.

A Quality Center Administration request is a call for assistance with a specified Quality Center instance or project, such as:

- Creating a new project based on a template

- Copying of an existing project
- Synchronizing project configurations and customizations with another project
- Creating a new user account
- Updating a user account
- Resetting password of a user account
- Adding or removing user from a QC project or group

These requests are routed to the CoE administration or operations teams and are handled by either a Quality Center administrator or a system administrator. Unlike general support requests, these requests are specific to QC administration, and automate a pre-defined list of administrative tasks.

All requests for general, administrative or IT support are handled by either an application administrator for Quality Center, ITG administrator, or system administrator. These requests are focused primarily on application software or hardware configuration, upgrades, installations, customizations, etc.

CoE users can submit, view, and approve administration requests as specified in the workflow. Administration request activity can be viewed through portlets distributed to the appropriate roles.

1.3.6. Training and Certification

HP Center Management for QC includes pre-built requests and processes for training and certifying the CoE members. The certification course request allows the appropriate CoE users to collect and approve course material in a best-practice type workflow. *Figure 1-4* shows the course definition workflow.
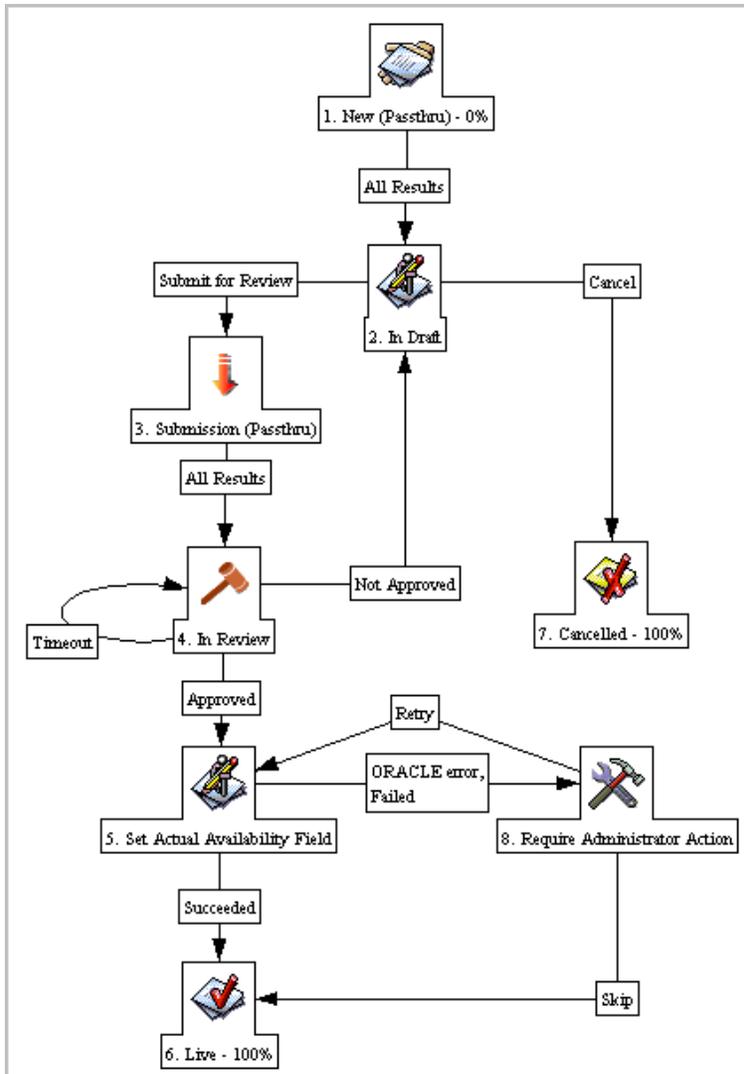
Figure 1-4. Certification course definition workflow

1.3.7 Supporting the end users of QA applications

A request for support can be created by the end users of quality assurance applications, such as Quality Center, QTP, WinRunner, etc. These requests typically revolve around application usability and technical issues. These requests are handled by the CoE support engineers. Feedback provided by the requestor upon completion of the support request is channeled to the CoE manager in order to ensure that support services are being handled effectively.

1.3.8. Reporting on Quality Metrics

All throughout the application delivery lifecycle, quality remains an important factor. Status reports are generated on an ongoing basis, allowing all stakeholders to gain visibility into application quality and progress of the QA efforts. This type of transparency is made possible through the integration between QC and ITG projects and test status report results are available through various ITG portlets.

A test status report is linked to a single QC project. It queries QC project for statistics on requirements coverage, review status, test execution status and defect statistics. A series of test status reports for a testing project are used for trending captured quality metrics.

Figure 1-5 shows a project status update report providing an overview of current project status based on scope, resources, schedule, risks and issues.

Figure 1-5. Quality Center project status portlet

Chapter 2
Installing HP Center Management for Quality Center

In This Chapter:

2.1. Software Requirements
2.2. System Requirements
2.3. Platform Support
2.4. Known Issues and Limitations
2.5. Installing HP Center Management for QC

2.1. Software Requirements

To use HP Center Management for QC, you must have the following components:

1. Quality Center 8.2, Quality Center 9.0 or Quality Center 9.2 installed.

2. Mercury IT Governance Center Release 6.0 (SP13).

3. Oracle SQLPLUS Client `('sqlplus')`.
Make sure that you are able to connect to your ITG Oracle database instance from the command-line using `'sqlplus'`.

4. DB_CONNECTION_STRING in server.conf.
Make sure that `'com.kintana.core.server.DB_CONNECTION_STRING'` property is set to ITG's Oracle Database TNS name in server.conf. The TNS name usually matches the Oracle SID, although there are exceptions. If this property does not exist, insert it. This property is used by the HP Center Management for QC setup scripts to upload required data and SQL procedures into ITG database.

2.2. System Requirements

Table 2-1 lists the hardware requirements for installation.

Component	CPU	RAM	Hard Drive
Application Server	2 GHz	1 GB	65GB (400MB for core, ~60 GB for attachments)
Database	Dual 2GHz	2 GB	550 MB

Table 2-1. Hardware requirements for HP Center Management for QC installation

2.3. Platform Support

HP Center Management for QC requires ITG server installed on a Microsoft Windows platform. This restriction is due to the use of Quality Center OTA API which is only available on Microsoft Windows operating system.

2.4. Known Issues and Limitations

1. The Training & Certification menu link does not work. There is an error in the encoding of `'&'`. In order to enable the menu link, you need to update the

'RequestCreateDispactcher.jsp' file under "$ITG_HOME\server\ *
\deploy\itg.war\web\knta\crt\" directory as follows:

BEFORE (Line#30): queryParams.append(cs.encode());
AFTER (Line#30):
queryParams.append(cs.encode().replaceAll("&","%26amp%3B"));
Do not make the change if the line does not match the 'BEFORE' condition.

2. The global user data objects for 'User' and 'Contact' are replaced during the installation. By
default, ITG provides a blank 'User' and 'Contact' user data model. However, if you had
customized these user data objects and wish to preserve them, you should consider backing up
your user data configuration or commenting out the ci_postimportcontent phase from the
Mercury Quality Management JAR file before installing content.

3. New installations of ITG provide default request types that are either not relevant (i.e. Bug
Request) for the Center of Excellence or should be limited only to the Center of Excellence
personnel (i.e. all PMO requests). The ITG administrator should update user access rights to
such requests to allow access only to relevant security groups.

2.5. Installing HP Center Management for QC

To install HP Center Management for QC:

1. Make sure you have download the following bundle:
mitg-600-MQCM.jar

3. Copy the mitg-600-MQCM.jar file to the *<ITG_Home>* directory.

4. Check if SQLPLUS.EXE is accessible from the path. If not, add Oracle's BIN directory to the
path and verify that SQLPLUS.EXE can be executed from the command prompt.

5. Invoke kDeploy script from <ITG_HOME>/bin directory from command prompt as follows:
sh kDeploy.sh –i MQCM

6. As kDeploy.sh runs, respond to prompts, providing login and password information.
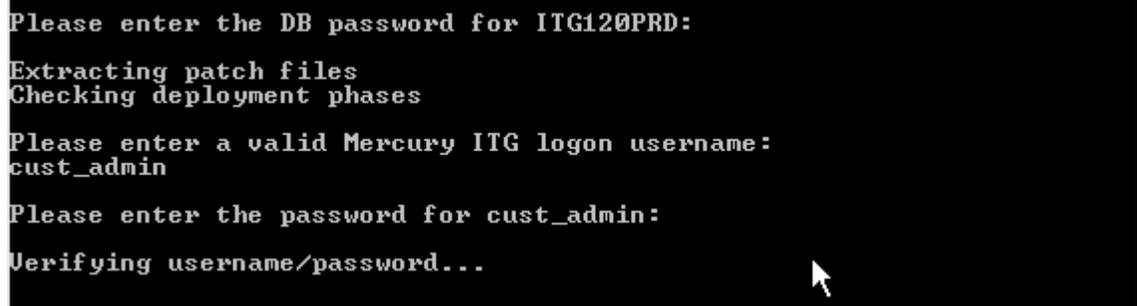
```
Please enter the DB password for ITG120PRD:

Extracting patch files
Checking deployment phases

Please enter a valid Mercury ITG logon username:
cust_admin

Please enter the password for cust_admin:

Verifying username/password...
```

7. Stop and Restart the ITG Server.

Note: JSR-based portlets will not be registered with ITG until the ITG Server process has been
restarted.

When the installation process is complete, the following message appears:

```
Deployment MCQM has been successfully installed.
```

Each entity that was installed correctly is marked as "Complete." If necessary, correct any errors and repeat the installation procedure.

```
Installing AQM-AQMBusinessAnalyst.zip . . . . Complete.
Installing AQM-AQMDeveloper.zip . . . . Complete.
Installing AQM-AQMDevelopmentManager.zip . . . . Complete.
Installing AQM-AQMProgramManager.zip . . . . Complete.
Installing AQM-AQMProjectManager.zip . . . . Complete.
Installing AQM-AQMQAEngineer.zip . . . . Complete.
Installing AQM-AQMQAManager.zip . . . . Complete.
Installing AQM-AQMQAProjectLead.zip . . . . Complete.
Installing AQM-AQMQATester.zip . . . . Complete.
Installing CoE-CoEAdministrativeManager.zip . . . . Complete.
Installing CoE-CoECertificationManager.zip . . . . Complete.
Installing CoE-CoEITGAdministrator.zip . . . . Complete.
Installing CoE-CoEProductAdministrator.zip . . . . Complete.
Installing CoE-CoESupport-Tier1.zip . . . . Complete.
Installing CoE-CoESupport-Tier2.zip . . . . Complete.
Installing CoE-CoESystemAdminsitrator.zip . . . . Complete.
```

8. Update database settings for KINTANA_SERVER environment object from the ITG Workbench by performing the following steps:

> a. Log into ITG.
>
> b. Select Administration. Open Workbench from the left navigation menu.
>
> c. From the Workbench, select the Environments tab, then click on the Environments icon.
>
> d. Query and update the KINTANA_SERVER environment. If it does not exist, create an environment with the name 'KINTANA_SERVER'.
>
> e. Update the database settings of the environment (see example in Figure 2-1):
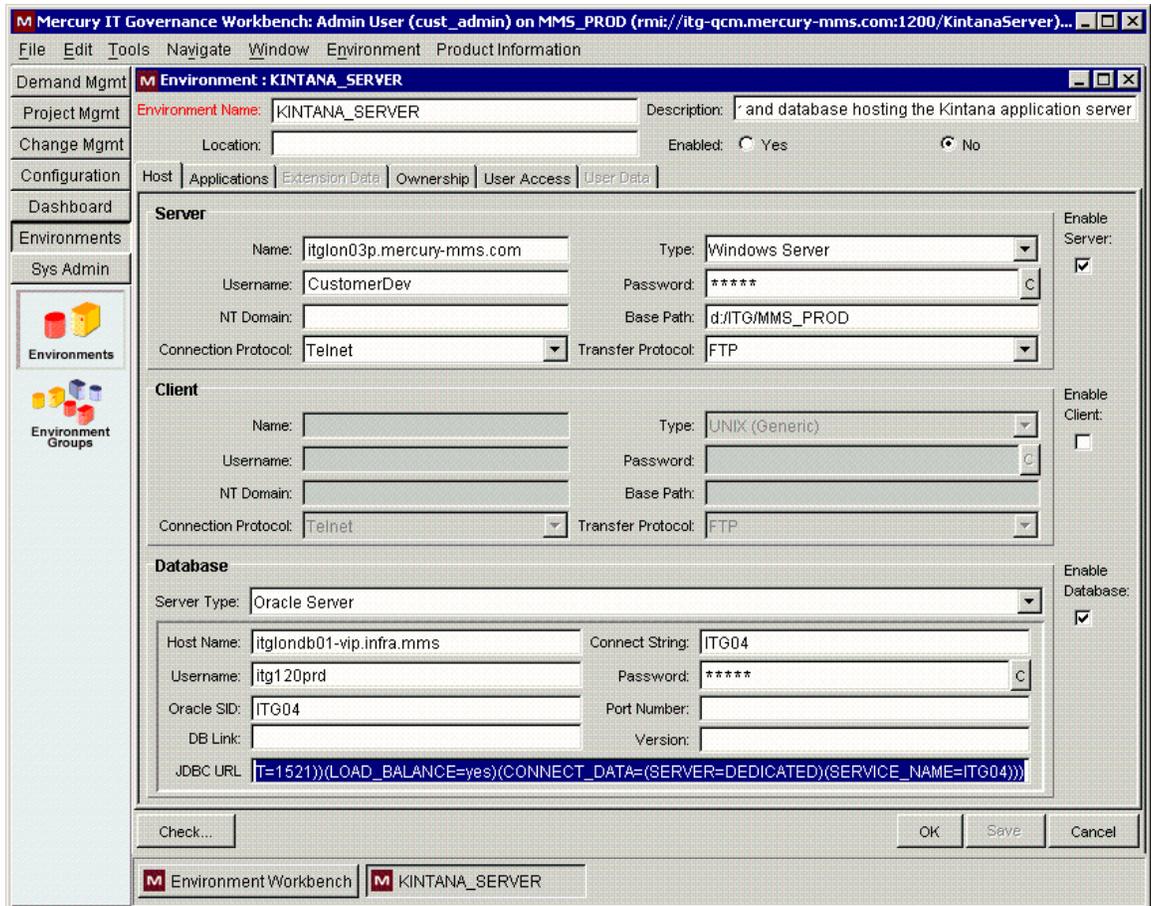
Figure 2-1. Example of database settings update

Note: If JDBC_URL is already defined in your <ITGHOME>/server.conf file, then you can reference the JDBC connection string using the token [AS.JDBC_URL].

9. Enabling Quality Center Connectivity

a. Launch Internet Explorer on the ITG Server and navigate to both Quality Center user site and the administration site:

http://<qcserver>:<port>/qcbin

Select the link for Quality Center to download and install the user site ActiveX controls.

```
Download OTA Client complete.
██████████████████████████████████████████████████

Download Web Gate Client complete.
██████████████████████████████████████████████████

Download Vapi-XP Testing Tool complete.
██████████████████████████████████████████████████

Download TdCommandProtocol complete.
██████████████████████████████████████████████████

Download Document Generator Templates in progress ...
█████████████████████████

Download Vapi-XP Testing Tool agent complete.
██████████████████████████████████████████████████

Download Resource Logger complete.
██████████████████████████████████████████████████

Download Business Process remote agent in progress ...
████████████

Download Business Process Testing Tool in progress ...

Download Component Type Configuration in progress ...

Download User Interface in progress ...
```

Select the link for Site Administration to download and install the QC Administration ActiveX Controls.

```
Download Site Administrator in progress ...
███████

Download Site Administrator API complete.
██████████████████████████████████████████████████████████
```

The download of the above controls will also download and install the necessary libraries for QC OTA interfaces (i.e. TD Client and SA APIs).

b. Validate QC Connectivity

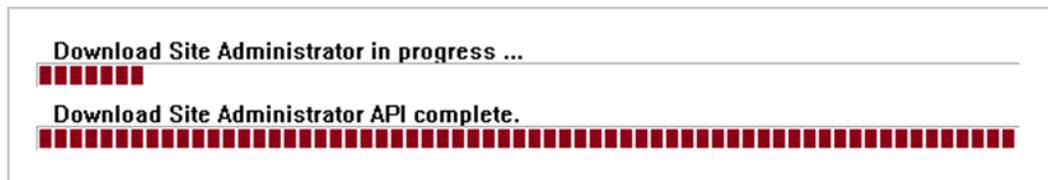i) Launch command prompt (`cmd.exe` or `command.exe`)

ii) Go to <ITG_HOME>/ext/qcm/scripts directory.

iii) Execute the following command with the appropriate arguments

```
cscript.exe /nologo qcm_qc_ListOfDomains.vbs
<qc_url_address> <qc_user> <qc_password>
```

Example:

```
cscript.exe /nologo qcm_qc_ListOfDomains.vbs
http://qcsrv.company.com:8080/qcbin testuser testpwd
```

The output of the script will list all the domains that the specified user has access to.

c.   For QC 8 users ONLY - Populate QC USERS_PROJECT table.

This step is required for QC 8 users only. Do not execute this script if you are using QC version 9.0 or later.

All Quality Center related portlets (e.g.: QC Project Status, QC User Query) reference the data in the Quality Center USERS_PROJECTS table. In Quality Center 8.2, the data in this table is not automatically populated by the Quality Center. In order to ensure that these portlets function correctly, HP Center Management for QC provides a script that should be executed during the installation.

      i. Launch command prompt (cmd.exe or command.exe)
      ii. Go to <ITG_HOME>/ext/qcm/utilities directory.
      iii. Execute the following command with the appropriate arguments

```
 cscript.exe /nologo qcm_qc_populate_usrproj_table.vbs
 <qc_sa_url_address> <qc_sa_username> <qc_sa_password>
<qc_db_servername> <qc_db_type> <qc_sa_dbname> <qc_dbsid> <db_username>
<db_password> <qc_project_list>
```

Where:

Argument	Explanation	Example
`<qc_sa_url_address>`	QC site administration URL	http://qcsrv.company.com:8080/sabin
`<qc_sa_username>`	QC site administrator's user name	
`<qc_sa_password>`	QC site administrator's password	
`<qc_db_servername>`	QC site administration database server name	mydbserver.company.com or 192.168.1.2
`<qc_db_type>`	QC database type	ORACLE or MSSQL
`<qc_sa_dbname>`	QC site administration database name	qcsiteadmin_db
`<qc_dbsid>`	Oracle database SID (for MSSQL this should be an empty string "")	
`<db_username>`	Database administrator's user name	
`<db_password>`	Database administrator's password	
`<qc_project_list>`	Comma separated list of projects or "ALL"	

Note: When specifying a comma separated list of projects, follow the following syntax, `'<domain_name>/<project_name>'` (e.g. `"Default/QualityCenter_Demo, Default/MyProject"`)

Example 1: HP Quality Center with Oracle database and user-specified projects

```
cscript.exe /nologo qcm_qc_populate_usrproj_table.vbs
http://qcsrv.company.com:8090/sabin "admin" "password"
"oradbsrv.company.com" "ORACLE" "qcsiteadmin_db" "ORASID" "system"
"manager" "Default/QualityCenter_Demo, DomainA/ProjectA"
```

Example 2: Quality Center with MSSQL database and all projects

```
cscript.exe /nologo qcm_qc_populate_usrproj_table.vbs
http://qcsrv.company.com:8090/sabin "admin" "password"
"mssqldbsrv.company.com" "MSSQL" "qcsiteadmin_db" "" "sa" "password"
"All"
```

Note: It is recommended to execute this script on a periodic basis or add the script as a scheduled task to be executed regularly to ensure that the data in the USERS_PROJECTS table is updated.

Once the installation is complete, the administrator must register the Quality Center instance using the request provided in the HP Center Management for QC. QC instance registration is

required to enable the functionality of the HP Center Management for QC. For detailed instructions on registering a QC instance, see Chapter 11.

Chapter 3
Setting Up HP Center Management for Quality Center

In This Chapter:

3.1. Overview of Setting up HP Center Management for QC
3.2. Customizing Field Values
3.3. Customizing HP Center Management for QC Entities

3.1. Overview of Setting up HP Center Management for QC

Once HP Center Management for QC has been successfully installed, a number of entities need to be configured to enable its full functionality and customize the values to fit your organization's needs. While the request types, workflows, and project templates delivered as part of HP Center Management for QC are ready to use immediately after installation and system-level configuration, they can also be further configured to fit your business needs.

- A number of fields in the HP Center Management for QC contain generic values and should be customized to reflect your company's naming conventions.
- User accounts need to be created in Mercury IT Governance Center for each Quality Center member. These users should then be assigned to security groups according to their roles and responsibilities.
- HP Center Management for QC requests can trigger email notifications to be sent to specific users at certain points along the workflow. These email notifications contain variables, such as team or department titles. These variables are defined in the <ITG_HOME>\server.conf file and should be modified to fit your company's naming conventions.

Note: In order to streamline the user experience for the Quality CoE and line of business users, you may consider disabling certain request types, workflows, or other entities that are not part of the quality process. However, before disabling any entities, you should check with other business units who may be using Mercury IT Governance Center.

3.2. Customizing Field Values

Field types and values in Mercury IT Governance Center are controlled by validations. To change the list of possible values in a field, you must edit its validations in the Mercury IT Governance Workbench.

Note: In general, only validations that are described as "Customizable" should be modified. Any validations whose prefixes do not contain the word "Customizable" should not be altered in order for HP Center Management for QC to function correctly. For example, do not change validations with descriptions beginning with "(Static)", "(AutoComplete)" or "(Workflow)".

The Department field in the HP Center Management for QC requests is an example of a static list validation, which provides a list of options to the user. A static list validation can be a drop-down or an auto-complete list component.

To add values to the validation list:
1. Log on to Mercury IT Governance Center and open the Workbench.
2. In the shortcut bar, click **Configuration > Validations.**

3. In the **Query** tab of the Validation Workbench window, click **List.**

The **Results** tab opens, displaying the results of the search.
4. Select **KNTA - Department - Enabled** and click **Open.**
The Validation window opens with the Department field's validation loaded.
5. Click **New.**
The Add Validation Value window opens.
6. Enter information for the validation value as described in the following table.

Field	Definition
Code	The underlying code for the validation value. The code is the value stored in the database or passed to any internal functions, and is rarely displayed.
Meaning	The displayed meaning for the validation value in the drop-down list or the auto-complete.
Desc	A description for the validation value.
Enable?	Determines whether the validation value is enabled. This should be checked if you want the value to appear in the field.
Default	Determines whether the value is the default value for the list. This value is initially displayed in drop-down lists (this is not used for autocomplete lists). There can be only one default value per list.

7. (Optional) Set the validation value as the default by checking the Default field. The default option is only available for drop-down lists.

8. Click **OK** to close the window and add the value to the validation. Click **Add** to add the value and keep the Add Validation Value window open. Validation values can be re-ordered using the up and down arrow buttons. The sequence of the validation values determines the order that the values are displayed in the list.

9. When you are done adding values to the validation, click **Save** or **OK** in the Validation window to save the new values.

Note: You can copy existing values defined in other validations using the **Copy From** button. Click **Copy From** and query an existing list-validated validation and choose any of the validation values. Click **Add** or **OK** in the Copy From window and the selected value or values are added to the list.

Note: Use caution when creating validations (drop-down lists and autocomplete lists) that are validated by lists. Each time the set of values changes, you will be forced to update the validation. Consider, instead, validating using a SQL query or PL/SQL function to obtain the values from a database table.

For more information on editing and creating validations of various types, see the "Working with Validations" chapter in the Commands, Tokens, and Validations Guide and Reference.

In HP Center Management for QC, validations have been consolidated for the following key request types:

Request Type	Consolidated Validation Name
Support Request	COE_CSR_SUPPORT_CAT_SUB_TPC_LIST
IT Service Request	COE_CSR_ITSERVICE_CAT_SUB_TPC_LIST
Knowledge Base Article	COE_MSC_KB_CAT_SUB_TPC_LIST

Users can enter all the token codes for Category, Subcategory or Topic into the same validation.

Each of these validations uses two user data fields:

- **Type**: This can be one of the following values - Category, Subcategory or Topic

    - **Parent**: Represents the parent token code for which the Subcategory or Topic belongs to. For categories, this value is <None>.
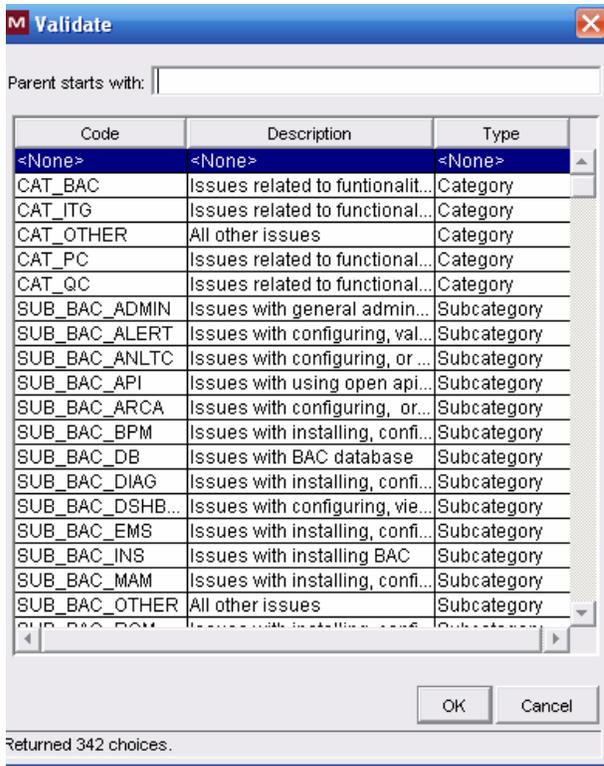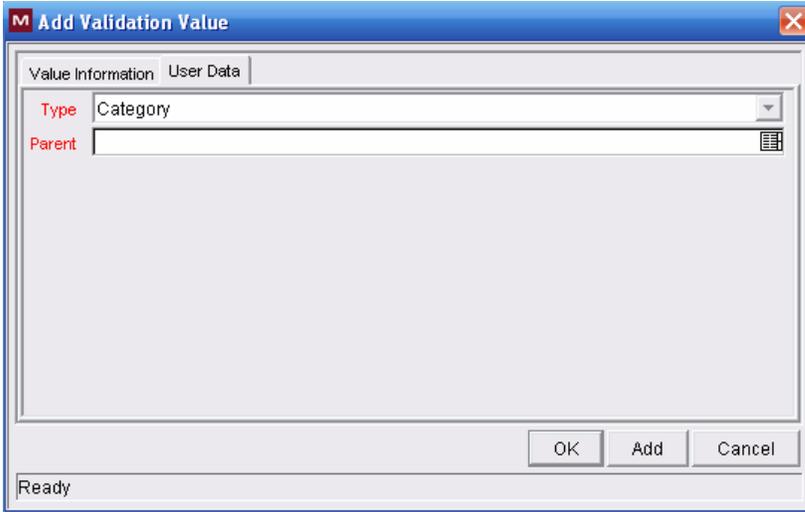
3.3. Customizing HP Center Management for QC Entities

HP Center Management for QC provides request types, workflows, portlets, Dashboard modules and project templates delivered as pre-built best-practice content. These entities can be used immediately upon installation. However, they may also be customized to better fit your company's

existing business practices and procedures. Several documents are available to guide you through the customization process of Mercury IT Governance Center entities.

Table 3-1 lists the HP Center Management for QC entities and the corresponding Mercury IT Governance Center configuration guides.

Entity	Configuration Guide
Request types	Mercury Demand Management: Configuring a Request Resolution System
Workflows	Mercury Demand Management: Configuring a Request Resolution System
Dashboard modules and portlets	Configuring the Standard Interface
Project templates	Mercury Project Management User's Guide

Table 3-1. Mercury IT Governance Center configuration guides

Chapter 4
Configuring Users and User Groups

In This Chapter:

4.1. Creating a New User Account
4.2. Linking Users to Security Groups
4.3. Configuring User Resource Information
4.4. Setting up Contact Information
4.5. Delivering Role-based Dashboard Views
4.6. Customizing Notifications

All line of business and Quality COE members who require access to HP Center Management for QC must be defined as users in the Mercury IT Governance Center. When creating a new user account, the following steps must be performed:

1. Create a new user account in IT Governance Center.

2. Associate the user with the security groups based on their role.

3. Assign licenses to the user based on security group's license requirements.

4. Distribute appropriate dashboard modules for the user group.

4.1. Creating a New User Account

Note: Both Mercury IT Governance Center and HP Quality Center have their own user management systems, and both offer LDAP integration. In order to ensure that both systems have the same accounts and access grants, it is strongly recommended that both use LDAP or Active Directory services for managing user accounts. Using LDAP for authentication also facilitates compliance with SOX and other regulations.

Note: The login name in Mercury IT Governance Center and HP Quality Center must be the same for a user. Various portlets that pull information from Quality Center use the ITG user's login name to determine which QC project that login name has access to. Therefore, if an ITG user's login name does not exist in QC, that user will not be able to see the information in the QC portlets.

Tip: Mercury ITG provides the ability to import and validate user data from the user interface tables or an LDAP server into the Mercury ITG user data model. This report runs the User Open Interface. For more information about this report, see the Open Interface Guide and Reference.

To create a new user:

1. Ensure that the validations "KNTA - Department - Enabled" and "CRT - Company" have been configured to fit your business needs.

2. Log on to Mercury IT Governance Center and open the Workbench.

3. In the shortcut bar, click **Sys Admin > Users.**
The User Workbench opens.

4. Click **New User** on the User Workbench or select **File > New > User.** The User window opens.

5. Enter the following required information: Username, First Name and Last Name.
The username must be unique in Mercury IT Governance Center.

6. Enter the general information in the appropriate fields.
Refer to *Table 4-1* for a detailed description of each field on the **User Information** tab.

7. Create a password for the user.
　　　　a. Click the button to the right of the required Password field. The Enter or Change
Password window opens.

　　　　b. Enter a password in the Enter New Password field, and confirm in the Confirm New
Password field. This password is encrypted both in the user interface and the database.

　　　　c. Click **OK** to close the window.

8. Specify when the password will expire using either of the following methods:
- Select **Yes** for New password on login to force the user to reset the password.
- Use the Password Exp. Days field to specify the number of days that a user has to change the
password. When a value is entered in this field, the Password Exp. Date field is automatically
updated.

9. Select a method for the user's authentication from the Authentication Mode field.
Possible values are **ITG, LDAP, NTLM,** and **SITEMINDER.** If **ITG** is chosen, then authentication
is performed using the internal User Database of Mercury IT Governance Center. If another
authentication mode is chosen, authentication is performed using the enterprise directory
database server. This field's behavior can be set in the server.conf file by modifying the
AUTHENTICATION_MODE parameter.

10. To give the user a user administrator license, select the User Administration checkbox.

Selecting this option provides this user with access to all user configuration functionality for the products licensed at your site. The User Administration license is required to configure user accounts and security groups.

11. From the System Level Licenses and Application Licenses sections, select the products and license types to associate with the user.

The Application Licenses provide access to the applications indicated. The **Configuration** license provides access to all product functionality available through the Workbench and HTML interfaces. For more detailed information, see the "Managing Your Mercury IT Governance Licenses" chapter of the *Security Model Guide and Reference.* Users without an application license checked will not see that product's shortcut groups or menu items.

Tip: You can assign licenses to multiple users using the License Workbench. See the "Managing Your Mercury IT Governance Licenses" chapter of the Security Model Guide and Reference for details.

12. In the **Security Groups** tab, link the desired security groups to the user to specify the user's functional roles and access grants.

13. In the **Ownership Groups** tab, select the ownership groups who will have the right to edit, copy or disable this user. See the "Configuration Security" chapter of the Security Model Guide and Reference for details on ownership groups.

14. Click **OK.**

The new user can now log onto Mercury IT Governance Center using the username and password.

Table 4-1. User window: User Information tab fields

Fields	Definition
Username	Unique name for a user's account. The name entered to log onto Mercury IT Governance Center.
Company	The company the user works for. The values in this auto-complete list are set by the following validation: CRT - Company.
First Name	The first name of the specified user.
Last Name	The last name of the specified user.
Email Address	The email address for a user. This address is referenced in other portions of the application and should be formatted as name@domain.com.
Phone Number	The phone number for the user.
Authentication Mode	A list of the methods available for authentication. Possible values are **ITG, LDAP, NTLM,** and **SITEMINDER.** If **ITG** is chosen, then authentication is performed using the internal User Database of Mercury IT Governance Center. If another authentication mode is chosen, authentication is performed using the enterprise directory database server. See the Open Interface Guide and Reference for details.
Start Date	The date when a user account becomes activated.
End Date	The date on which a user account becomes disabled. You can leave this field blank to indicate no end date.
Last Login	The date of a user's last system logon. This date is deleted based on a parameter in the server.conf file, DAYS_TO_KEEP_LOGON_ATTEMPT_ROWS. The default value for this parameter is 14 days. If there is no value in the Last Login field, the user has not logged in for at least 14 days (assuming the parameter has not been changed from the default to another value). See the System Administration Guide and Reference for server.conf parameter details.

Domain	Used only when using NTLM authentication. This can be set in the *<ITG_HOME>*/integration/ntlm/ntlm.conf file.
Password	The user's password. Administrators can set restrictions on the password format: minimum length, required special characters, etc. These restrictions are specified in the server.conf file on the Mercury IT Governance Center Server. See the System Administration Guide and Reference for server.conf parameter details.
New Password on Logon	Setting to determine whether to ask a user to enter a new password the next time they logon.
Password Exp. Days	The number of days before a user's password expires. The first time a user logs on after the password expiration date, the user will be prompted to enter a new password.
Password Exp. Date	The date on which a user's password expires. The value in this non-updateable field is calculated by the Password Expiration Days attribute or the Ask New Password On Logon attribute.
Configuration	Selecting this option provides this user with access to all functionality for the products licensed at your site, including configuration interfaces for all Mercury IT Governance entities (for example, object types, request types, workflows, and validations) except users and security groups.
User Administration	The User Administration license is required to configure user accounts and security groups.
Change Management	The Change Management license provides access to all product functionality available through the Workbench interface and additional access to advanced HTML interface functions. Users who do not have this box checked will not see the Change Mgmt screen group or associated menus.
Demand Management	The Demand Management license provides access to all product functionality. Users that do not have this box checked will not see the Demand Mgmt screen group or associated menus.
Portfolio Management	The Portfolio Management license provides access to Portfolio Management functionality, and must be used in conjunction with a Demand Management license. Users that do not have this box checked will not see the related menus and can not access the functionality.
Program Management	Select the Program Management license to enable user access to Program Management functions, and must be used in conjunction with a Demand Management and Project Management license. Users that do not have this box checked will not see the related menus and can not access the functionality.
Project Management	The Project Management license provides access to all Project, Resource, and Financial Management functionality available through the Workbench interface and additional access to advanced HTML interface functions. Users that do not have this box checked will not see the Project Mgmt screen group or associated menus.
Time Management	Select Time Management license to enable user access to Time Management functions in Mercury IT Governance Center. Users that do not have this box checked will not see the related menus and can not access the functionality.
Edit Resource	Each user also has associated resource settings such as Title, Direct Manager, and Capacity. Click this button to view or edit the resource settings associated with the user.
Time Management Settings	If Time Management is licensed for a particular user, click this button to configure their time management settings. This includes defining the period type and time sheet approvers.

4.2. Linking Users to Security Groups

All users of the HP Center Management for QC can be grouped into two categories: the Line of Business (LOB) users, and the Center of Excellence (COE) users. The LOB roles consist of project managers, developers, QA managers, testers, etc. COE roles include administrators, support engineers, trainers, etc.

Each role is represented by an ITG Security Group. Each group has its own permissions and access grants, allowing users in different roles to access different information relating to the quality process. Users of HP Center Management for QC should be members of at least one of the security groups in *Table 4-2* below, as well as at least one of the groups in *Table 4-4.*

Table 4-2. Required security groups

IT Governance Security Group	User
COE ALL USERS	All users of HP Center Management for QC.
COE CORE USERS	Members of the Quality COE

Table 4-3. Security groups and roles

Team	Security Group/Role	License
LOB - Project Management Team	Program Manager	PM, DM CU
	Business Analyst	DM CU, TM
	Project Manager	PM, DM CU
LOB - Development Team	Developer	DM CU, TM
	Development Manager	PM, DM CU
LOB - Quality Assurance Team	QA Manager	PM, DM CU
	QA Project Lead	PM, DM CU
	QA Tester	DM CU, TM
	QA Engineer	DM CU, TM
CoE - Practice / Training Team	Certification Manager	DM PU
	Trainer	DM PU
CoE - Application Support Team	Support Tier-1	DM PU
	Support Tier-2	DM PU
CoE – Administration Team	Administrative Manager	U, C
	Product Administrator (QC)	U, C
	ITG Administrator	U, C
	System Administrator	DM PU

Licenses:
-PM: Project Management
-DM PU: Demand Management Power User
-DM CU: Demand Management Casual User
-TM: Time Management
- C: Configuration
- U: User Administration

All users of the HP Center Management for QC must also be assigned to at least one of the security groups as described in Table 4-4. Users can be linked to security groups through the **Security Groups** tab of the User window or through an organization model defined in Mercury IT Governance Center.

Table 4-4. Required security groups

IT Governance Security Group	User
COE ALL USERS	All users of Center Management MUST be included in this security group. Some views are only enabled for a user if he/she belongs to this group.
COE CORE USERS	Only users that belong to COE-type security group MUST be included in this security group.

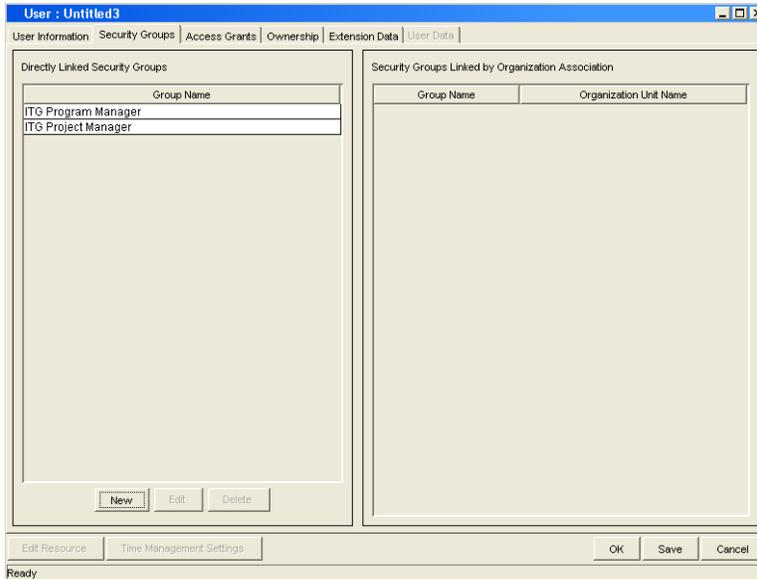To link a user to a security group using the User window:
1. Open the User window.
2. Click the **Security Groups** tab.
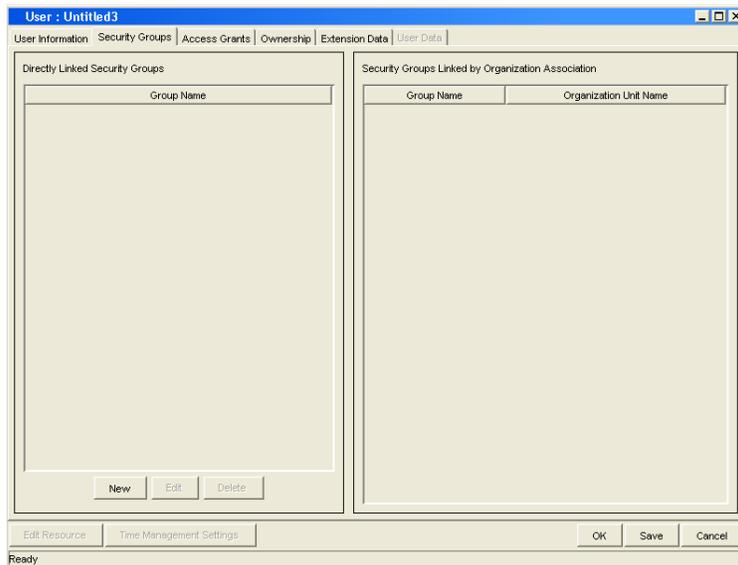
3. Click **New.**
The Security Groups window opens.
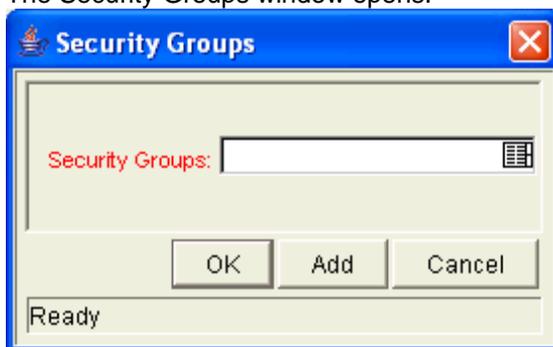
4. From the Security Groups field, select the security groups that you would like to link to the user.
5. Click **OK** to add the list of security groups to the User window.

6. Click **Save** to save the user information.

Note: If the user is associated with an organization unit (defined in the Mercury Resource Management™ functionality), he/she may inherit security group associations. These security groups will be listed in the **Security Groups** tab in the Security Groups Linked by Organization Association list. See the Mercury Resource Management User's Guide for details.

4.3. Configuring User Resource Information

A resource is a person who performs work tracked by Mercury IT Governance Center. Resources can include employees, contractors, managers, or any other category your organization may need. Each user is considered a resource in Mercury IT Governance Center. For each user, you can capture information specific to that resource, such as:

- **Skills.** The main duties or abilities of the user (such as QA Engineer or Developer).

- **Cost Rate.** The hourly cost associated with a resource or skill, which represents the charge-back or billed cost of their labor.

- **Workload Capacity.** A percentage that indicates what portion of a resource's working day is available for planned workload items. For instance, a particular DBA may be required to participate in meetings every day, and therefore is set to devote 80% of their capacity to workload items.

For instructions on configuring resource information, see the Mercury Resource Management User's Guide.

4.4. Setting up Contact Information

Contacts are resources used as a point of reference or information. Contacts must have a valid Mercury IT Governance Center username and the company they work for must be included in the validation **CRT - Company Validation.**

Contact information can be added for users in Mercury IT Governance system as well as external users.

To create a contact:

1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Demand Mgmt> Contacts.**
The Contacts Workbench opens.

3. In the Contacts Workbench, click **New Contact.**
The Contact window opens.

4. Complete the fields in the Contact window as specified in the following table:

Field	Description
First Name	The first name of the contact.
Last Name	The last name of the contact.
User	The Mercury IT Governance Center username of the contact. This field is populated from the **KNTA – User Id - All Validation** auto-complete list and cannot be edited. You should select a username from the validation auto-complete list.
Phone Number	The phone number of the contact.
Email Address	The email address of the contact.
Company	The company employing the contact. This field is populated from **CRT - Company Validation** auto-complete list and cannot be edited. You should select a company from the validation auto-complete list.
Enabled	Make the notification template available to the system. Select **Yes** to make the notification available to the system.

5. In the Contact window, click **OK.**

The contact information is saved.

4.5. Delivering Role-based Dashboard Views

HP Center Management for QC provides a number of Dashboard modules containing essential information based on the users' role in the quality process. Each Dashboard module corresponds to the security group and includes sets of portlets specific to each role.

For example, a user that belongs to a security group: AQM QA Manager should be receiving AQM – AQM QA Manager module – as shown in Table 4-5.

Table 4-5. Security groups and corresponding Dashboard modules

ITG Security Group	ITG Dashboard Module
AQM Program Manager	AQM - AQM Program Manager
AQM Project Manager	AQM - AQM Project Manager
AQM Business Analyst	AQM - AQM Business Analyst
AQM Development Manager	AQM - AQM Development Manager
AQM Developer	AQM - AQM Developer
AQM QA Manager	AQM - AQM QA Manager
AQM QA Project Lead	AQM - AQM QA Project Lead
AQM QA Tester	AQM - AQM QA Tester
AQM QA Engineer	AQM - AQM QA Engineer
COE Certification Manager	COE - COE Certification Manager
COE Certification Trainer	COE - COE Certification Trainer
COE Support Tier 1	COE - COE Support Tier 1
COE Support Tier 2	COE - COE Support Tier 2
COE Administrative Manager	COE - COE Administrative Manager
COE Product Administrator	COE - COE Product Administrator
COE ITG Administrator	COE - COE ITG Administrator
COE System Administrator	COE - COE System Administrator

Table 4-6 provides detailed information on pre-configured Dashboard pages and portlets that are available to users in each role.

Table 4-6. Dashboard Page and Portlet Content by Role

Team	Role	Dashboard Page	Dashboard Portlets
LOB - Project Management Team	Program Manager	Front Page	Web Frame Portlet (CM) - Business Service Levels Project Gantt My Requests My Tasks AQM - Project Listing AQM - Business Value Map
		Quality Mgmt	Quality Center Project Status (CM) Project Summary Pie Chart AQM - Requirement Coverage by Status AQM - Requirement Coverage Trending (%) AQM - Test Progress By Status AQM - Defect Breakdown by Status (#) AQM - Test Execution Status Trending (%) AQM - Defect by Status Trending
		Service Mgmt	Business Availability View
		Resource Mgmt	AQM - Skillset Coverage Analyze Resource Pools Resource Pool List

		Training	CoE - Certification - Recent Publications CoE - Certification - Available Courses CoE - Certification - My Requests
	Business Analyst	Front Page	My Project Listing My Requests Project Gantt My Tasks
		Project Mgmt	Quality Center Project Status (CM)
		Training	CoE - Certification - Available Courses CoE - Certification - Recent Publications CoE - Certification - My Requests
	Project Manager	Front Page	My Requests Web Frame Portlet (CM) - Business Service Levels AQM - Business Value Map Project Gantt My Project Listing My Tasks
		Quality Mgmt	AQM - Defect Breakdown by Status (#) AQM - Requirement Coverage by Status Quality Center Project Status (CM) AQM - Test Progress By Status AQM - Requirement Coverage Trending (%) AQM - Test Execution Status Trending (%) AQM - Defect by Status Trending Project Summary Pie Chart
		Service Mgmt	Web Frame Portlet (CM) Business Availability View
		Resource Mgmt	AQM - Skillset Coverage Resource Pool List Analyze Resource Pools
		Training	CoE - Certification - Recent Publications CoE - Certification - My Requests CoE - Certification - Available Courses
LOB - Development Team	Developer	Front Page	My Requests Quality Center Requirements (CM) My Tasks Quality Center Defects (CM)
		Quality Center	Web Frame Portlet (CM) - Quality Center View
		Training	CoE - Certification - Recent Publications CoE - Certification - My Requests CoE - Certification - Available Courses
	Development Manager	Front Page	My Requests My Project Listing My Tasks Project Gantt
		Quality Mgmt	Quality Center Project Status (CM)
		Training	CoE - Certification - Recent Publications CoE - Certification - My Requests CoE - Certification - Available Courses
		Quality Center	Web Frame Portlet (CM) - Quality Center View
LOB - Quality Assurance Team	QA Manager	Front Page	My Tasks My Requests My Project Listing Project Gantt
		Quality Overview	AQM - Test Execution Status Trending (%) AQM - Aggregate Defect by Status Trending AQM - Requirement Coverage Trending (%) Quality Center Project Status (CM)
		QA Drilldown	Quality Center Test Lab (CM) Quality Center Requirements (CM) Quality Center Defects (CM) Quality Center Tests (CM)

		Quality Center	Web Frame Portlet (CM) - Quality Center View (1) Web Frame Portlet (CM) - Quality Center View (2)
		Practice Mgmt	AQM - Skillset Coverage CoE - Certification - Available Courses CoE - Certification - Recent Publications CoE - Certification - My Requests
	QA Project Lead	Front Page	My Requests Quality Center Defects (CM) Quality Center Tests (CM) My Tasks
		QA Overview	Quality Center Requirements (CM) Quality Center Test Lab (CM)
		Quality Center	Web Frame Portlet (CM) - Quality Center View (1) Web Frame Portlet (CM) - Applications Under Test
		Training	CoE - Certification - My Requests CoE - Certification - Available Courses CoE - Certification - My Requests
	QA Tester	Front Page	My Tasks Quality Center Tests (CM) Quality Center Requirements (CM) Quality Center Test Lab (CM) My Requests Quality Center Defects (CM)
		Quality Center	Web Frame Portlet (CM) - Quality Center (1) Web Frame Portlet (CM) - Application Under Test Web Frame Portlet (CM) - Quality Center (2)
		Training	CoE - Certification - My Requests CoE - Certification - Available Courses CoE - Certification - Recent Publications
	QA Engineer	Front Page	My Requests Quality Center Defects (CM) My Tasks Quality Center Tests (CM)
		QA Overview	Quality Center Requirements (CM) Quality Center Test Lab (CM)
		Quality Center	Web Frame Portlet (CM) - Applications Under Test Web Frame Portlet (CM) - Quality Center (1)
		Training	CoE - Certification - My Requests CoE - Certification - Available Courses CoE - Certification - Recent Publications
		Resource Mgmt	AQM - Skillset Coverage Resource Pool List Analyze Resource Pools
		Training	CoE - Certification - Recent Publications CoE - Certification - My Requests CoE - Certification - Available Courses
CoE - Practice / Training Team	Certification Manager	Front Page	My Requests My Tasks COE - Certification - Open Requests CoE - Certification - Recent Publications CoE - Certification - Active Training
		Resource Center	CoE - Certification - Active Training AQM - Skillset Coverage CoE - Certification - Recent Publications COE - Certification - Open Requests CoE - Certification - Available Courses

		Front Page	CoE - Certification - Active Training My Requests COE - Certification - Open Requests My Tasks CoE - Certification - Recent Publications
	Trainer	Resource Center	COE - Certification - Open Requests CoE - Certification - Available Courses AQM - Skillset Coverage CoE - Certification - Active Training CoE - Certification - Recent Publications
CoE - Application Support Team	Support Tier-1	Front Page	My Tasks CoE - Support - My Service Requests CoE - Support - Open Requests CoE - Certification - Recent Publications
		Certifications	CoE - Certification - My Requests CoE - Certification - Available Courses CoE - Certification - Recent Publications
	Support Tier-2	Front Page	My Tasks CoE - Support - Open Requests CoE - Certification - Recent Publications CoE - Support - My Service Requests
		Support Center	CoE - Support - Top Issues by Category CoE - Support - Issue Status CoE - Support - Issue Priority CoE - Support - Issue Trending (Cluster) CoE - Support - Open Requests
		Certifications	CoE - Certification - Recent Publications CoE - Certification - Available Courses CoE - Certification - My Requests
CoE – Administration Team	Administrative Manager	Front Page	My Tasks CoE - IT Service - Open Administrative Requests My Requests
		IT Service Center	CoE - IT Service - Issue Priority CoE - IT Service - Issue Status CoE - IT Service - Open Administrative Requests CoE - IT Service - Trending By Administrative Type (Cluster) CoE - IT Service - Issue Trending (Cluster) CoE - IT Service - Top Issues by Category CoE - IT Service - Customer Satisfaction
		Certifications	CoE - Certification - My Requests CoE - Certification - Available Courses CoE - Certification - Recent Publications
	Product Administrator (QC)	Front Page	My Tasks CoE - IT Service - Open Administrative Requests AQM - Quality Center Instances My Requests
		IT Service Center	CoE - IT Service - Issue Priority CoE - IT Service - Issue Status CoE - IT Service - Top Issues by Category CoE - IT Service - Open Administrative Requests CoE - IT Service - Trending By Administrative Type CoE - IT Service - Issue Trending
		Certifications	CoE - Certification - My Requests CoE - Certification - Available Courses CoE - Certification - Recent Publications
	ITG Administrator	Front Page	My Tasks My Requests CoE - IT Service - Open Administrative Requests
		IT Service Center	CoE - IT Service - Open Administrative Requests CoE - IT Service - Trending By Administrative Type

			CoE - IT Service - Issue Priority
			CoE - IT Service - Issue Status
			CoE - IT Service - Issue Trending
			CoE - IT Service - Top Issues by Category
		Certifications	CoE - Certification - Recent Publications
			CoE - Certification - Available Courses
			CoE - Certification - My Requests
	System Administrator	Front Page	My Requests
			CoE - IT Service - Open Administrative Requests
			My Tasks
		IT Service Center	CoE - IT Service - Issue Priority
			CoE - IT Service - Top Issues by Category
			CoE - IT Service - Issue Status
			CoE - IT Service - Open Administrative Requests
			CoE - IT Service - Issue Trending
			CoE - IT Service - Trending By Administrative Type
		Certifications	CoE - Certification - My Requests
			CoE - Certification - Recent Publications
			CoE - Certification - Available Courses

For detailed instructions on distributing Dashboard modules, see the "Distributing Modules" chapter in the Configuring the Standard Interface guide.

4.6. Customizing Notifications through server.conf

HP Center Management for QC uses ITG technology to trigger email notifications when certain workflow events occur during the request lifecycle. These notifications contain constants that are defined in the server.conf file and should be modified to include names and identifiers specific to your organization's naming conventions. These parameters are listed in Table 4-7.

For detailed instructions on modifying the server.conf file, see the "Server Configuration Parameters" appendix in the System Administration Guide and Reference.

Table 4-7. HP Center Management for QC server.conf parameters

Parameter	Description	Sample Values
com.kintana.core.server.COE_SUPPORT_REQUEST_ID	Support request identifier (CSR, GSR, SR, etc.)	GSR
com.kintana.core.server.COE_SUPPORT_CENTER	Name of the product support center or division	COE Support Center
com.kintana.core.server.COE_SUPPORT_TEAM	Name of the product support team	Center of Excellence Support Team
com.kintana.core.server.COE_ITSUPPORT_REQUEST_ID	IT/Administrative Service request identifier (ASR, SR, etc.)	ASR
com.kintana.core.server.COE_ITSUPPORT_CENTER	Name of IT/Administrative center or division	COE Admin Center
com.kintana.core.server.COE_ITSUPPORT_TEAM	Name of IT/Administrative team	Center of Excellence Administrative Team
com.kintana.core.server.COE_KB_REQUEST_ID	Knowledge base article identifier	KB
com.kintana.core.server.COE_TRAINING_CERTIFICATION_REQUEST_ID	Training and certification request identifier	TCR
com.kintana.core.server.COE_COURSE_DEFINITION_REQUEST_ID	Training and certification course definition identifier	CDR
com.kintana.core.server.COE_CERTIFIC	Name of Training and	COE Knowledge Center

ATION_CENTER	Certification center or division	
com.kintana.core.server.COE_CERTIFIC ATION_TEAM	Name of Training and Certification team	Center of Excellence Certification Team

Tip: The preconfigured `"com.kintana.core.server.PORTLET_MAX_ROWS_RETURNED"` generally limits the number of rows which can be shown in the ITG portlets. The default setting is set to 200. The same information can be viewed in the server configuration report from the Workbench >Sysadmin->Server Tools. Depending on the customer's portlets configuration, this parameter may need to be updated.

Chapter 5
Initiating Application Project Requests

In This Chapter:

5.1. Extending the ITG Project Request to Incorporate Quality Processes

Application delivery is a complex process that includes development, testing, and fine-tuning that must be performed before production deployment. In order to ensure successful business outcomes, application quality needs to be approached as a consistent process that is a part of the overall application delivery lifecycle.

Mercury IT Governance Center provides the ability to capture and manage IT project requests to allow visibility into IT tasks and promote collaboration between IT and the Line of Business. It enables businesses to consolidate, prioritize, and fulfill demand for both strategic projects and day-to-day activities, as well as manage service levels.

HP Center Management for QC extends the ITG functionality to incorporate the quality steps into the application delivery project processes and workflows. By linking the QC and ITG projects and extending the workflow to include the essential testing steps, HP Center Management for QC provides the entire organization with visibility into quality effort's resources, progress and metrics, helping keep applications aligned with business objectives.

The application project is managed by the project manager, while the QA lead, Development lead and Operations lead ensure the completion of the key phases of the development lifecycle.

5. 2. Initiating a New Project Request

The application project initiation request form is designed to capture requests across the business so each can be evaluated and prioritized based on its relative merit. Workflow processes control how requests are resolved so every request can be appropriately evaluated, prioritized, scheduled, and fulfilled.

The application project initiation request follows the workflow based on the best practices in application delivery. The workflow (pictured in Figure 5-1) contains three major phases:

- Define and create an ITG project plan;
- Define and create a QC project;
- Follow the SDLC through application design, development, testing and deployment.

7. Project Already Exists, Please Rename

1. New

All Results

Failed, All Errors

Click here to continue

6. Check ITG Project — Create ITG Project from Template — 3. Define Project Plan — Assigned — 2. Assign Responsibilities — Assigned — 12. Define QC Project

Failed, All Errors

Succeeded

Assign Existing ITG Project

Failed, All Errors

Cancel

8. Create ITG Project

Failed, All Errors

4. Attach Existing ITG Project — Retry — 5. Check Assigned ITG Project

Failed, All Errors

Create QC Project — Cancel — Assign Existing QC Project

13. Create AQM Administrative Request — Succeeded — 14. QC Project Setup — Completed — 15. Check Admin Request Status — Succeeded — 16. Verify Project in QC

Succeeded

9. Update Project Fields

Succeeded

Failed

Succeeded

10. Update Project Dates

Succeeded

11. OR — Success — 18. AND — Succeeded — 17. Create Requirement

All Errors, Failed

Failed, All Errors

Succeeded

35. Get QC Required Fields

Success

19. Detailed Project Definition

Completed — Failed

20. Business Readiness Sign Off

Completed — Failed

21. Requirements

Completed — Failed

22. Design

Completed

23. Develop

Completed — Failed

Create New Testing Request — 24. Setup Testing Request — Use Manual Test

Failed

26. Create Testing Request

Cancel

Attach Existing Testing Request

Failed

Succeeded

25. Assign Existing Testing Request — Succeeded

Failed

29. Manual Test

27. Check Testing Status

Completed — Failed

Succeeded

28. Check Testing Request Status — Succeeded — 30. Post Testing Evaluation — Failed

Completed

More Work Needed

31. Deploy

Completed

32. End of Project

Succeeded

33. Create Asset

Succeeded

EXIT

34. Project Completed - 100%

45

Figure 5-1. Application project workflow

During the first phase, a user in a line of business or member of the Quality CoE on behalf of a line of business requests to initiate a new project. The application project initiation request form contains high-level objectives and requirements for the project, including initial justification, business need, desired completion time and estimated resources.

As the request is passed through the workflow, gathering approvals and comments, the project manager translates the initial submission into the comprehensive ITG project request, complete with ownership and resource assignments, business case details, value and risk ratings and project health metrics. For each stage of the application delivery lifecycle, the project manager assigns leads who will be responsible for the completion of a set of steps in the workflow. The development lead is responsible for delivering the application to QA for testing. The QA lead is responsible for initiating a QC project, managing the testing effort, and providing quality metrics and status. The operations leads are responsible for assisting in the deployment of the application.

With the information submitted in the initial project request, the project manager creates a new project plan – usually by using a project plan template provided by the HP Center Management for QC. The project manager will then either reference an existing ITG project or create a new ITG project to be assigned to this project plan. The details of this phase of the application project workflow are described in Table 5-1.

Table 5-1. Application project request workflow – steps 1-10

	Workflow Steps	Details
1.	New	A new request for initiating a project is created.
2.	Assign Responsibilities	A project manager assigns owners for key stages in the application delivery lifecycle – such as application development, quality assurance, or operations.
3.	Define Project Plan	The project manager creates a new project based on a project plan template. The project will be automatically added as a reference to the request.
4.	Attach Existing ITG Project	The project manager also has an option to attach an existing ITG project to the application project request.
5.	Check Assigned ITG Project	If attaching an existing ITG project to request fails, the project manager should check and correct the project plan settings and try again. If the problem persists, an ITG administrator should be contacted for assistance.
6.	Check ITG Project	Before attaching the project, the project manager must ensure that the specified project name is unique.
7.	Project Already Exists, Please Rename	If the project name already exists, the user is prompted to enter a unique value in the 'Project Name' field.
8.	Create ITG Project	The project manager is able to create a new project in ITG based on a specified project plan template. The fields 'Project Name', 'Project Template', and 'Project Manager' are required.
9.	Update Project Fields	The system updates the Project Plan and Existing ITG project fields based on the Project Name field entered by the user.
10.	Update Project Dates	The system updates the Project Start and Finish dates based on the planned start date as entered by the user. If no start date was

		provided, the updates are based on SYSDATE.

In parallel with the ITG project creation, the project manager or QA lead must specify a QC project that will track testing requirements, assets, and results for the application project. Either a new or existing QC project may be assigned to this application request. To create a QC project, the QA manager submits a QC Administrative Request, which must be completed and closed before continuing. (For additional information on the QC Administrative Request, see Chapter 11). The details of this phase of the application project workflow are described in Table 5-2.

Table 5-2. Application project request workflow – steps 12-17

	Workflow Steps	Details
12.	Define QC Project	The QA lead creates new QC project or assigns an existing one.
13.	Create AQM Administrative Request	A QC Administrative Request is created by the user for the purpose of requesting a new QC project.
14.	QC Project Setup	Once a QC project has been created, the project manager or QA lead must enter all required information and submit request for verification. The AQM Administrative Request used to create the QC project should be closed or completed before continuing.
15.	Check Admin Request Status	This execution step checks whether the Administrative request attached as a reference to the Project Request is closed or not. If closed, the workflow advances to verifying the QC project information.
16.	Verify Project In QC	The information provided for the Quality Center instance information is verified.
17.	Create Requirement	This step creates or verifies the test requirement path provided in the QC project.

Once both the ITG project and the QC project have been created and assigned to the request, the application project can continue to the design, development, testing and deployment phase, according to the SDLC workflow. The project definition and requirements must be signed off by all required stakeholders and the design and development steps must be completed before the application is ready for testing. The testing cycle consists of setting up and/or assigning the testing request or performing a series of manual tests. For details on the testing request type, see Chapter 6. The details of this phase of the application project workflow are described in Table 5-3.

Table 5-3. Application project request workflow – steps 18-34

	Workflow Steps	Details
18.	AND	Both an ITG project and QC project must be assigned to application project request before continuing.
19.	Detailed Project Definition	The project manager defines detailed project requirements.
20.	Business Readiness Signoff	Application project is pending approval and sign-off from program or project management.
21.	Requirements	Requirements are defined and reviewed.
22.	Design	Application design is built.

23.	Develop	Application is being developed. Once application is ready, it is submitted for testing.
24.	Setup Testing Request	Application is ready for testing. Assigned QA lead either creates a new testing project request or uses an existing testing request to drive the testing effort.
25.	Assign Existing Testing Request	The assigned QA lead is prompted to select an existing testing project request. The selected request is attached as a reference to the current request.
26.	Create Testing Request	This step creates a new testing project request. The newly created request is attached as a reference to the current request.
27.	Check Testing Status	Check if testing is completed.
28.	Check Testing Request Status	This step checks the status of the testing request.
29.	Manual Test	Manually test an application and document pass/fail results.
30.	Post Testing Evaluation	Check if application quality passed testing requirements and application is ready for deployment.
31.	Deploy	Deploy application as per standard SDLC process.
32.	End of Project	End of Project
33.	Create Asset	Create asset for the application
34.	Project Completed	The application project request has been completed.

To submit a project initiation request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, *see the Getting Started guide.*

2. From the menu bar, select **Center Management > Quality Management > Initiate Application Project.**

The Create New AQM - Application Project page appears, displaying the appropriate project initiation request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information often helps expedite the review and approval process. For information concerning a specific field, click the [?] icon next to the field (where available).

a. Summary.

The Summary section contains unique request properties – such as creator of the request, assignments, priority, and driving process. Detailed information on the fields within this section is provided in Table 5-4.

Table 5-4. Application project request - summary section

Field Name	Field Definition
Project Request ID	A unique ID for the application project request.
Status	The workflow status of the request.
Created By	The name of the user who submitted the request.
Created On	The date the request was submitted.
Priority	The priority of the request.
Driving Process	The name of the workflow used for this request type.
Business Unit	The business unit that owns the project request.
Description	A brief description of the request.
Assigned To	The name of the user responsible for completing or managing the application project request.

b. Project Details

The Project Details section contains information about the project plan, project owners, leads, and expected timelines. Detailed information on the fields within this section is provided in Table 5-5.

Table 5-5. Application project request - project details section

Field Name	Field Definition
Project Information	
Project Name	The name of the project. This field is used when a new project is created based on a project plan template.
Business Objective	A specific business objective addressed by the project.
Project Class	Type or class of the project (i.e. growth, innovation, core, etc.)
Asset Class	Type or class of asset produced by the project.
Application	Name of the product or application.

Version	Version of the product or application.
Project Owners/Leads	
Project Manager	The name of the project manager responsible for the application project request.
Project Sponsor	The name of the project sponsor supporting the application or project initiative.
Development Lead	The name of the development lead responsible for overseeing the development of the project.
QA Lead	The name of the QA manager or lead responsible for the testing effort for the project.
Operations Lead	The name of the operations lead responsible for the deployment of the application.
Project Health	
Calculated Health	The calculated health indicator for the project.
Overridden Health	The overridden health for the project.
Project Plan	The name of an existing ITG project plan. This value must match the project name, and/or existing ITG project.
Project Health	The project health indicator for the project.
Project Template	The name of the project plan template that is used to create a new project.
Existing ITG Project	The name of the existing ITG project plan that represents the project for this request. The specified project plan will be attached as a reference to this request when defining a project for this request.
Planned Start Date	The planned start date for the project.
Planned Finish Date	The planned finish date for the project.
Actual Start Date	The actual start date for the project.
Actual Complete Date	The actual completion date for the project.

c. Business Case Details

The Business Case Details section contains details on budget, financial benefit, staffing profile, and business value. It also includes necessary documentation on the business case and requirements for the project. Detailed information on the fields within this section is provided in Table 5-6.

Table 5-6. Application project request – business case details section

Field Name	Field Definition
Budget	The budget for the project.
Staffing Profile	The staffing profile for the project.
Financial Benefit	The financial benefit the project is expected to bring.
Return On Investment	The expected return on investment from the project.
Value Rating	The numeric value calculated based on the values entered in the 'Value Rating'

	section.
Risk Rating	The numeric value calculated based on the values entered in the 'Risk Rating' section.
Score Adjustment	The numeric value entered to adjust the value in the 'Total Score' field.
Total Score	The value calculated based on the value and risk ratings. The value entered in 'Score Adjustment' field is added in the 'Total Score' field.
Business Case Doc	A document attachment that provides the business case for the project.
Requirements Doc	A document attachment that provides business requirements for the project.

d. Value Ratings

The Value Ratings section contains metrics to measure the overall value of the project to the organization. Detailed information on the fields within this section is provided in Table 5-7.

Table 5-7. Application project request – value ratings section

Field Name	Field Definition
Internal Rate of Return	Value of the project in terms of rate of return.
Strategic Match	Value of the project in terms of strategic importance.
Competitive Advantage	Value of the project in terms of competitive advantage.
Competitive Response	Value of the project in terms of competitive response.
Productivity	Value of the project in terms of expected increase in productivity.

e. Risk Ratings.

The Risk Ratings section contains fields to evaluate the overall risk of the project based on various metrics / considerations. Detailed information on the fields within this section is provided in Table 5-8.

Table 5-8. Application project request – risk ratings section

Field Name	Field Definition
Organization Risk	Assessment of risk to the organization due to delay or failure in project.
Technical Risk	Assessment of technical risk to successful completion of the project.
Architecture Risk	Assessment of risk based on impact of architecture requirements for project.
Definition Risk	Assessment of risk in requirements and specifications of project.
Infrastructure Risk	Assessment of risk to current infrastructure based on project requirements.

f. Project Status

The Project Status section contains information on the current status of the project, along with quality and performance assessment. Detailed information on the fields within this section is provided in Table 5-9.

Table 5-9. Application project request – project status section

Field Name	Field Definition
Current Progress Assessment	An overview of the current status, progress, and challenges in the project.
Overall Quality	Quality assessment based on the testing effort performed by QA.
Requirements Status	Requirements status and coverage details.
Test Execution Status	QA test execution status and details.
Defects Status	Status of application defects uncovered during the QA process.
KPI Summary	A list of user-defined key performance indicators. • **Type** - Type of KPI (e.g. Project, Development, Quality, etc.) • **Key Performance Indicator** - Name of the key performance indicator (e.g. defect density, percent of application features implemented, etc.) • **Expected/Goal** -Target goal for the measured KPI. • **Baseline** - A reference or baseline value of the measured KPI. • **Last Result** - Most recent or current value or result of the measured KPI. • **Status** - Status indicator for the KPI (i.e. Green/Yellow/Red) • **Improvement (%)** - The degree or percentage of improvement of the measured KPI in reference to its baseline. • **Details** – An overview of the status or change in the KPI. The description may also contain any pertinent rational or cause for the change.

g. Project Contacts.

The Project Contacts section tracks a list of contacts that are involved in the project. Each contact contains the following details:

- **Full Name** - The full name of the contact.
- **Title** - The title or position of the contact.
- **Company** - The Company name of the contact.
- **Direct Tel#** - The direct telephone number of the contact.
- **Cellular Tel#** - The cellular telephone number of the contact.
- **Email Address** - The email address of the contact.
- **Instant Messenger** - The instant messenger ID of the contact.
- **Notes** - Any additional notes pertaining to the contact.

h. Quality Center Details.

The Quality Center Details section contains information on the Quality Center project linked to this application request. It also includes the parent requirement within QC's requirement module from which test statistics are gathered. Detailed information on the fields within this section is provided in Table 5-10.

Table 5-10. Application project request – Quality Center details section

Field Name	Field Definition
Quality Center Information	
Quality Center Instance	The name of the Quality Center instance.
QC Username	The username or login of the QC user.
QC Password:	The password of the QC user.
QC Domain	The name of the QC Domain. Only domains that the QC user has access to will be shown.
QC Project	The name of the QC Project from which data will be retrieved. Only projects that the QC user has access to will be shown.
Status Message	The descriptive message that displays the results of validating connectivity with the specified Quality Center instance and project.
Quality Center Test Requirement Path	
Existing Requirement Path	(Optional) The full path to the parent requirement in the specified QC project.
Existing Requirement ID	The identifier of the parent requirement. This value is used for gathering requirements and test execution statistics in the test status report.
New Requirement Path	(Optional) The path to a new requirement in a QC project. If this field is specified, the Existing Requirement ID is automatically filled when this requirement path is generated during QC profile setup steps in the workflow.
Testing Project Information	
Testing Request	Link to a child testing request

i. Project Assets (by Phase)

The content in this section is intended for informational and tracking purposes. Although none of the fields are required for managing the project, they may be used to provide visibility into the project along each phase of the application development lifecycle. Fields in this section may be customized to meet corporate standards for managing projects. Detailed information on the objectives for each section is provided in Table 5-11.

Table 5-11. Application project request – project assets

Section	Objectives
Project Definition	- Identify opportunities for improving business operations in the organization. - Evaluate and examine existing solutions. - Recommend alternative concepts and methods to satisfy business needs (for example: does the business require a new IT solution or will a change in the business process satisfy the organization's needs?) - Secure executive technical and business sponsorship. - Determine the feasibility and suitability of all available alternatives. - Identify system interfaces. - Discover basic functional and data requirements to satisfy the business need. - Establish system boundaries, identify goals, objectives, critical success factors, and performance measures.

	• Evaluate costs and benefits of alternative approaches to satisfy the basic functional requirements • Assess project risks • Identify and initiate risk mitigation actions • Develop high-level technical architecture, process models, data models, and a concept of operations
User, System, & Data Requirements	• Further refine and document the functional and data requirements. Complete business process reengineering of the functions to be supported (e.g., verify what information drives the business process, what information is generated, who generates it, where does the information go, and who processes it.) • Develop detailed data and process models including system inputs and outputs. • Develop the test and evaluation requirements that will be used to determine acceptable system performance.
Analysis & Design	• Identify potential risks and define risk-mitigating features. • Perform a security risk assessment. • Develop a conversion plan to migrate current data to the new system. • Determine the operating environment. • Define major subsystems and their inputs and outputs. • Allocate processes to resources. • Prepare detailed logic specifications for each software module.
Build & Test	• Translate the detailed requirements and design into system components. • Test individual elements (units) for usability. • Prepare for integration and testing of the IT system. • Perform testing at the development facility – potentially involving the end-users • Test the deployed system with the help of both end users and contractors. • Perform operational testing by the end users.
Deploy	• Deploy application into production environment. • Train users on working with the application. • Operate, maintain, and enhance the system. • Certify that the system can process sensitive information. • Conduct periodic assessments of the system to ensure that the functional requirements continue to be satisfied. • Determine when the system needs to be modernized, replaced, or retired.

4. In the Notes section, enter additional information.

5. In the Create New AQM - Application Project page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

Chapter 6
Initiating Testing Project Requests

In This Chapter:

6.1. Using ITG to Manage Testing Project Plans, Resources, Progress and Status

The QA Testing Project request type is designed to assist QA managers in governing their testing projects. Using Mercury ITG's project and resource management capabilities, a QA lead can generate project plans, allocate resources, track progress and create key performance indicators for all of their testing initiatives.

The QA Testing Project provides the following key capabilities:

- Manage testing project plan and associated tasks utilizing ITG's project management capabilities.

- Assign resources to specific project tasks utilizing ITG's resource management functions.

- Review test status and application performance indicators by using the data from the QC project.

The QA Testing Project may be either created as a separate entity, or linked with an application project to combine data on the quality assurance activities with the general application project status.

6.2 Initiating a New Project Request

The QA Testing Project follows a generic QA workflow that includes the following steps:

- Create a test plan,
- Set up the testing environment,
- Specify test plan details and determine required testing assets,
- Run tests,
- Generate test status reports,
- Submit a final QA report detailing test results and application quality status

The actual testing activities (e.g. defining test requirements, recording test scripts, or running tests) should be performed in the test management application, such as HP Quality Center. The QA Testing Project within the HP Center Management for QC provides an overriding structure and best practices for governing the testing effort within the application lifecycle.
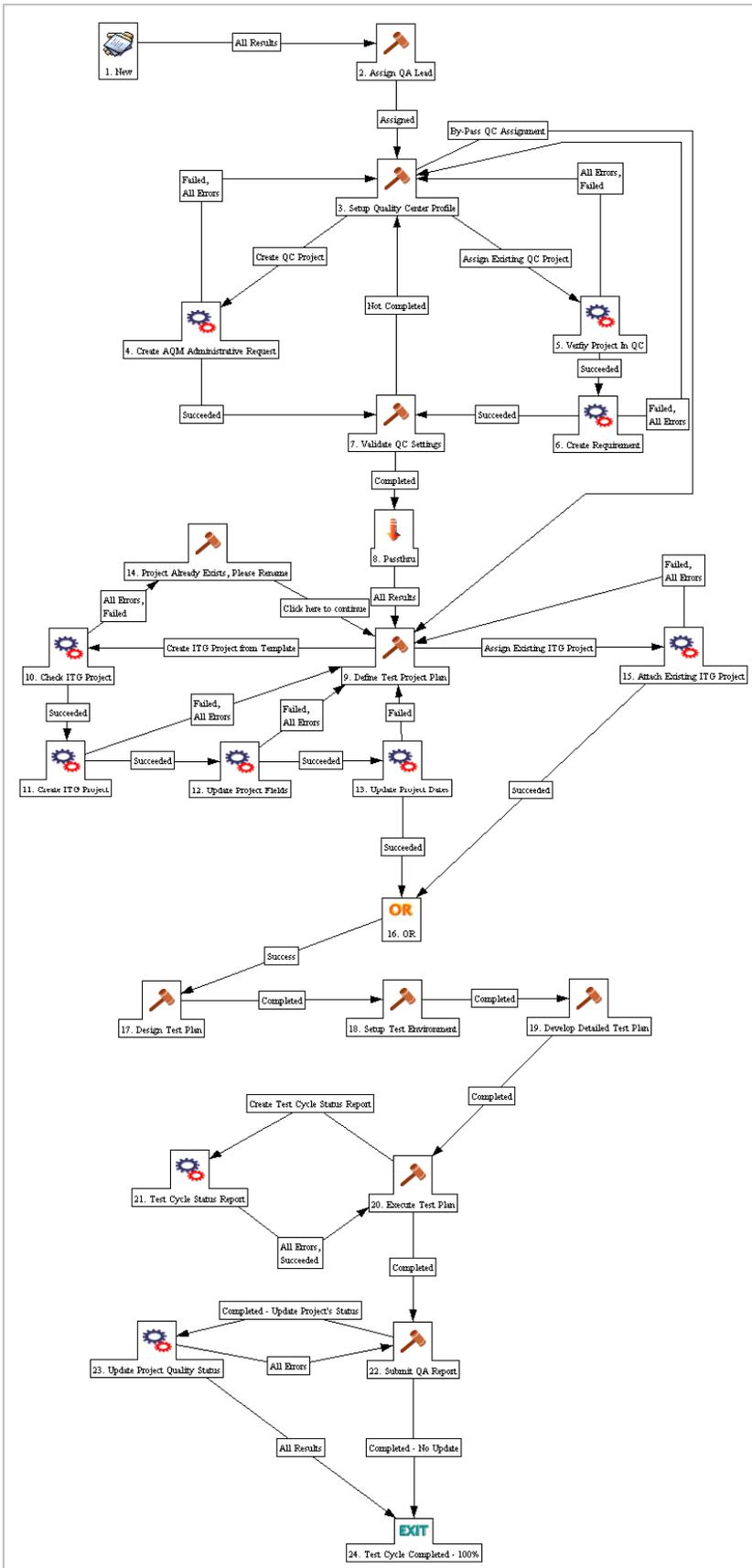
The QA Testing Project begins with the request form containing details and requirements for the application quality effort, including project scope, testing requirements and test plan details. As the request is passed through the workflow, it is assigned to the QA manager who will be responsible for overseeing the project's progress and reporting on its status. Through the link to the QC project, the QA Testing Project can receive automatic updates on the test status, so it is recommended to establish the connection between the two projects. The QA manager may choose to link a QA Testing Project to an existing QC project, or create a new one, in which case he/she must submit a QC Administrative Request. (For additional information on the QC Administrative Request, see Chapter 11). The QA lead must verify that the specified QC project is valid, and requirement ID provided corresponds to the parent requirement for the entire testing effort. This requirement ID will be used for reporting on coverage and test results. The details of this phase of the testing project workflow are described in Table 6-1.

Table 6-1.QA Testing Project Workflow – steps 1-7

	Workflow Steps	Details
1.	New	A new testing project request is initiated.
2.	Assign QA Lead	The request is assigned to a QA manager.
3.	Setup Quality Center Profile	If a new QC project creation is required, the QA manager may choose to submit a new QC administrative request to automate the creation of the QC project. Alternatively, the QA Testing Project request may be assigned to an existing QC project.
4.	Verify Project In QC	The information provided for the QC instance is verified.
5.	Create AQM Administrative Request	A QC Administrative Request is created by the user and attached as a reference to the QA Testing Request. This Administrative Request is a child of the Testing Project Request. The administrative request is used to create a new QC project, which will be linked to this testing initiative.
6.	Create Requirement	This step checks if the specified requirement path exists in the particular QC project. If the path does not exist, it is generated. • If a new requirement path is specified, it is created in the QC project, and a new QC requirement ID is assigned. • If a requirement ID is set, the path corresponding to the requirement ID is displayed in the requirement field.
7.	Validate QC Settings	The QA lead verifies the QC project and requirement settings

The assigned QA manager then either creates a new project plan based on a project template, or associates an existing ITG project plan to this testing request as a reference. The details of this phase of the testing project workflow are described in Table 6-2.

Table 6-2.QA Testing Project Workflow – steps 9-15

	Workflow Steps	Details

9.	Define Test Project Plan	The QA manager creates a new project plan or associates an existing ITG project plan to the testing request.
10.	Check ITG Project	Check that the project name for the ITG project plan is unique.
11.	Create ITG Project	Create a new project in ITG if the project name provided is unique. Creation of the project is based on 'Project Name', 'Project Template', and 'Project Manager' fields.
12.	Update Project Fields	Update the existing ITG project field based on the Project Name field entered by the user.
13.	Update Project Dates	Update the Project Start and End dates based on SYSDATE.
14.	Project Already Exists, Please Rename	If the project name provided for a new project is not unique, the user is prompted to enter a new name in the 'Project Name' field.
15.	Attach Existing ITG Project	Attach an existing ITG project plan to the testing request as a reference.

Following the project setup, the QA manager follows the workflow steps to ensure comprehensive and consistent testing effort. It is recommended that the QA manager creates and distributes periodic test status reports to identify trends and provide visibility into the testing project. HP Center Management for QC provides the ability to automatically query the Quality Center project and gather data on application quality and progress of the testing effort. For additional details on Test Status Report, see Chapter 8. Before the QA Testing Project can be closed, the QA lead submits a final application quality status report to project management and other stakeholders. Quality KPIs are a key factor in determining whether the application is ready for deployment. The details of this phase of the testing project workflow are described in Table 6-3.

Table 6-3.QA Testing Project Workflow – steps 17-24

	Workflow Steps	**Details**
17.	Design Test Plan	The QA lead is prompted to create a test plan.
18.	Setup Test Environment	The QA lead is prompted to set up the testing environment for the application under test.
19.	Develop Detailed Test Plan	The QA lead is prompted to develop test scripts and any related assets for the testing effort.
20.	Execute Test Plan	This step is used to indicate the start of the actual testing of the application. The QA lead may choose to automate the creation of test status reports which draw progress data for test coverage and defect status.
21.	Test Cycle Status Report	The test status report request is created automatically and attached as a reference.
22.	Submit QA Report	The QA lead submits a report to project management and application development stakeholders. The results in the KPI table can be uploaded to the application project's KPI table to update the project management team on the status of the QA effort.
23.	Update Project Quality Status	Updates the status fields (overall quality, requirements coverage and review status, test execution results, and

		defect statistics) in the application project which is a parent of this testing project request. A test status report request must be created for this testing project to upload data on requirements, test execution, and defects.
24.	Test Cycle Completed	This step closes the Testing Project Request.

To submit a project initiation request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the *Getting Started* guide.

2. From the menu bar, select **Center Management > Quality Management > Initiate Testing Project.**

The Create New AQM - QA Testing Project page appears, displaying the appropriate project initiation request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders involved in the testing process gain better understanding and visibility into the project. For information concerning a specific field, click the [?] icon next to the field (where available).

a. Summary.

The Summary section contains unique request properties – such as creator of the request, assignments, priority, and description. Detailed information on the fields within this section is provided in Table 6-4.

Table 6-4.QA testing project request – summary section

Field Name	Field Definition
Testing ID	A unique ID for this testing request.
Status	The workflow status of this request.
Created By	The name of the user who submitted the request.
Created On	The date the request was submitted.
Priority	The priority of this request.
Assigned To	The name of the user responsible for completing or managing the testing project request.
Assigned Group	The name of the assigned security group. The field's value is used to filter names for the 'Assigned To' field.
Description	A brief description of the testing project request.

b. Testing Project Plan

The Testing Project Plan section contains information on the testing project plan, the application under test and testing scope for the application. Detailed information on the fields within this section is provided in Table 6-5.

Table 6-5.QA testing project request – testing project plan section

Field Name	Field Definition
Project Manager	The name of the project manager of the ITG project plan. It is recommended that the QA lead managing this request be assigned as the project manager.
Project Name	The name of the project plan.
Project Template	The name of the project template which is used to create the ITG project. This field lists all available project templates in ITG.
Existing ITG Projects	The name of the existing ITG project that is attached as a reference if the user assigns an existing project to this request.
Application	Name of the product or application to be tested.
Version	The version of the product or application to be tested.
Test Requirements	An overview of testing requirements.
Test Scope	A multi-select list of testing type activities that are in scope for this testing project (ie. System, Performance, Security, etc.). This field is used for information purposes only.

c. Testing Status Overview.

The Testing Status Overview section contains the summary of the testing status, progress, and any user-defined key performance indicators. Detailed information on the fields within this section is provided in Table 6-6.

Table 6-6.QA testing project request – testing status overview section

Field Name	Field Definition
Current Progress Assessment	The current testing project progress assessment.
Grade	An assessment by the QA manager on whether the application passed or failed the testing or quality goals.
Overall Quality Status	An evaluation by the QA manager of the overall quality of the application under test using Green, Yellow, and Red indicators.
KPI Summary	A table for manually configuring and tracking user-defined KPIs.
Duration of Test Cycle (Days)	The expected or actual duration of the testing cycle.

d. Quality Center Details

The Quality Center Details section contains information on the Quality Center project linked to this testing request. It also includes the parent requirement within QC's requirement module from which test statistics are gathered. Detailed information on the fields within this section is provided in Table 6-7.

Table 6-7.QA testing project request – Quality Center details section

Field Name	Field Definition
Quality Center Instance	The name of the Quality Center instance.
QC Username	The user name or login name of the QC user.
QC Password:	The password of the QC user.
QC Domain	The name of the QC Domain. Only domains that the QC user has access to will be shown.
QC Project	The name of the QC Project from which data will be retrieved. Only projects that the QC user has access to will be shown.
Status Message	The descriptive message that shows connectivity status with the specified Quality Center instance and project.
Existing Requirement Path	(Optional) The full path to the parent requirement in the specified QC project.
Existing Requirement ID	The identifier of the parent requirement. This value is used for gathering requirements and test execution data for the test status report.
New Requirement Path	(Optional) The path to a new requirement in the QC project. If this field is specified, the Existing Requirement ID is automatically populated after the requirement path is generated during QC profile setup steps in the workflow.

e. Testing Requirements

The Testing Requirements section contains information on the testing goals and objectives, including specific requirements for each stage of the testing process – functional, performance, security, user-acceptance and operations readiness. Requirements-based testing ensures that the final application meets the end-user needs and provides the basis for consistent and repeatable testing process. Each type of testing requires the user to provide details on the goals

and objectives for the current testing stage, attach additional details and clarifications, or specify a URL link containing detailed requirements description.

4. In the Notes section, enter additional information.

5. In the Create New AQM – QA Testing Project page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

6.3. Handling Satisfaction Surveys

It is considered best practice for the Quality CoE to gather customer satisfaction data from the LOB during the project's life or after completing a project. HP Center Management for QC includes the following pre-built surveys contained in requests that can be sent out and processed along their own workflows:

- Delivery customer satisfaction survey
- Post-mortem customer satisfaction survey

6.3.1. Sending Delivery Customer Satisfaction Surveys

The delivery customer satisfaction survey is a request to the LOB for an evaluation of the current service rendered based on established expectations. The survey should be issued by the project manager to the LOB project manager on a periodic basis (such as weekly) in order to assess the customer's assessment of project progress. This request must be related to an application delivery or testing project through the Master Project field. The delivery customer satisfaction survey request follows the workflow pictured in Figure 6-1 and described in Table 6-8.
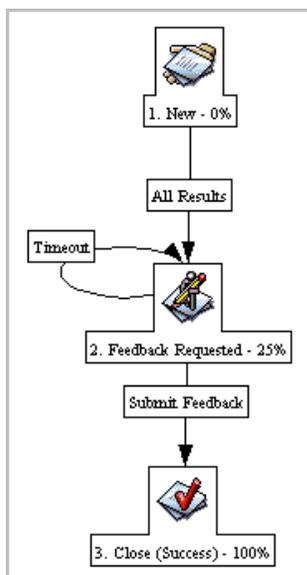
Figure 6-1.Delivery customer satisfaction survey workflow

Table 6-8.Delivery customer satisfaction survey workflow steps

	Workflow Steps	Details
1.	New	A new survey request for an application or testing project is submitted
2.	Feedback Requested	Feedback is entered from the assigned personnel, usually the project manager representing the LOB. The CoE project manager may also complete this form on the behalf of the LOB, if the LOB project manager does not have access to the ITG interface. A notification email with survey questions is sent to the assigned personnel and owner of the survey request.
3.	Close (Success)	The survey has been completed

To send out a delivery customer satisfaction survey:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the *Getting Started* guide.

2. From the menu bar, select **Center Management > Survey Results > Delivery Customer Satisfaction Survey.**

The Create New COE - Delivery Customer Satisfaction Survey page appears, displaying the appropriate survey request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the ? icon next to the field (where available).

4. In the Notes section, enter additional information.

5. In the Create New COE - Delivery Customer Satisfaction Survey page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated survey's detail page.

6. Once the survey request has been submitted, it is routed along its workflow.

6.3.2. Sending Post-Mortem Customer Satisfaction Surveys

The post-mortem customer satisfaction survey is a survey sent to the LOB after service has been rendered and the project has been completed. This survey measures the overall customer satisfaction and provides any necessary feedback or recommendations to the Quality CoE. This request must be related to an application or testing project through the Master Project field. The post-mortem customer satisfaction survey request follows the workflow pictured in Figure 6-2 and described in Table 6-9.
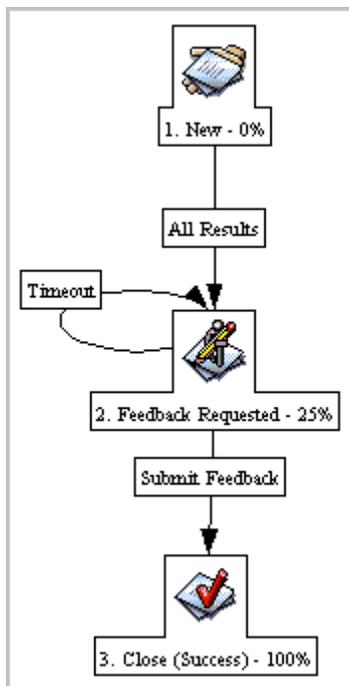
Figure 6-2.Delivery customer satisfaction survey workflow

Table 6-8.Delivery customer satisfaction survey workflow steps

	Workflow Steps	Details
1.	New	A new survey request for an application or testing project is submitted
2.	Feedback	Feedback is entered from the assigned personnel, usually the project

	Requested	manager representing the LOB. The CoE project manager may also complete this form on the behalf of the LOB, if the LOB project manager does not have access to the ITG interface. A notification email with survey questions is sent to the assigned personnel and owner of the survey request.
3.	Close (Success)	The survey has been completed

To send out a delivery customer satisfaction survey:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the *Getting Started* guide.

2. From the menu bar, select **Center Management > Survey Results > Post-Mortem Customer Satisfaction Survey.**

The Create New COE - Post-Mortem Customer Satisfaction Survey page appears, displaying the appropriate survey request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the ? icon next to the field (where available).

4. In the Notes section, enter additional information.

5. In the Create New COE - Post-Mortem Customer Satisfaction Survey page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated survey's detail page.

6. Once the survey request has been submitted, it is routed along its workflow.

Chapter 7
Creating and Managing Project Plans

In This Chapter:

7.1. Working with Project Plans
7.2. Assigning and Managing Resources

7.1. Working with Project Plans

The quality management workflow requires a creation of a project plan to be associated with the application or testing project request. This is accomplished in Mercury Project Management. Depending on the specific requirements and objectives of the project, the project plan may be created in one of the following ways:

- Using a pre-defined project template included in HP Center Management for QC.
- Using a pre-defined project template with added customizations to reflect your organization's unique project management needs.
- Import a existing project plan from Microsoft Project
- Building a project plan from scratch.

The project plan contains the work breakdown structure of the application or testing project, which defines such project elements as:
- Task hierarchy
- Resources or skills assigned to tasks
- Task and project schedule
- Project exception monitoring
- Project milestones
- Baselines
- Project budget
- Expected cost and effort

Once work has begun on the project, Mercury Project Management creates a Project Overview page accessible from your Dashboard and pictured in Figure 7-1, which can display project performance data including project percent complete, project Gantt chart, exceptions and other vital information for effectively managing the project. Additional sections on the Project Overview page included in the HP Center Management for QC allow you to track metrics specific to the application quality effort and outcomes. Detailed information on the portlets available for the Project Overview page is provided in Table 7-1.

Table 7-1: Project Overview Page – Available Portlets

Portlet Name	Description
AQM Key Performance Indicators	Shows current status of user-defined KPIs for both project and quality metrics.
AQM Quality Status Trending	Shows overview of all test status reports related to the project
CoE Project Status	Displays status of project based on all dimensions.
CoE Satisfaction Rating	Displays customer satisfaction rating for project based on delivery of the customer satisfaction survey.
Project Exception Detail	Displays information about the current project's exceptions, stating the violation, task state, start and finish dates and the assigned resource.
Project Exception Summary	Displays relevant exception information about the project. Exception rules are configured by the project manager using the Workbench.

Project Milestones	Shows a list of milestones within a project.
Project Overview Gantt	Displays the project and its details in a Gantt chart format. This portlet also allows drilling down into project and task details.
Project References	Displays the references that are attached to the project based on reference types, relationship, time period when they were added, and whether or not they are preventing actions on tasks.
Project Related Actions	Displays links to related assignments and staffing profiles
Project Summary	Provides a quick status for the selected project or subproject, including information on the project state, % complete, project manager and start and finish dates.
Subprojects and Tasks Summary	Displays information about the current project's subprojects and tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Figure 7-1. Project overview page

For detailed information on project plans and templates, see the Mercury Project Management User's Guide.

7.2. Assigning and Managing Resources

Mercury Resource Management enables you to effectively manage resource capacity and allocation. It balances the resource supply, including both staffing levels and skill base, with project demand. It allows organizations to manage resources in a logical way with both high-level planning and detailed scheduling. Resources can be planned by skill, availability, role, person or any combination of factors.

Detailed resource planning and visibility is essential for managing application and testing initiatives. It provides efficiency in tracking and managing shared resources with specific skill-sets (i.e. automation test engineers). Having visibility into available skills, capacity, assignments, utilization and other factors helps ensure effective resource-allocation decisions for all CoE projects.

For each project, the QA manager can instantly see the availability of the resources with required skill sets, find the best match using the resource selection portlets and assign resources to tasks.

For more information on managing resources and tasks, see Mercury Resource Management User's Guide.

Figure 7-2.Select resource portlet

Figure 7-3.Select resources to assign portlet

Figure 7-4.Resource load breakdown portlet

Assignments (hours) :Details

Showing workload for individual resources by weeks from 05/15/2006 - 07/02/2006.Total assignment value for: Scheduled Effort

Resource Name	Description	05/15/06	05/22/06	05/29/06	06/05/06	06/12/06	06/19/06
Mike Jones							
Task :Define Test Reqirements	HR Portal - Global Rollout - QA:Defin...	39.33					
Task :Design Test Plan	HR Portal - Global Rollout - QA:Desig...		40.25	32.2	40.25	40.25	7.04
Total Assignments		**39.33**	**40.25**	**32.2**	**40.25**	**40.25**	**7.04**
Available Capacity		(39.33)	(40.25)	(32.2)	(40.25)	(24.25)	32.96

Chapter 8
Initiating Project and Test Status Report Requests

In This Chapter:

8.1. Initiating a Project Status Report Request
8.2. Initiating a Test Status Report Request

8.1. Initiating a Project Status Report Request

The project status request updates the status of the project based on the following dimensions:

The project status update request must be related to an application or testing project request through the Master Project field. Upon completion of the project status update request, the corresponding project request's status fields are automatically updated. The Project Status Update request is made by the project manager to track the current progress and state of the project.

The project status update request qualifies the health of the project based on the following dimensions:

- Overall project status
- Scope status
- Resource status
- Schedule status
- Risks status
- Issues status

The request must be created as a child of a master project request (such as an application project or a testing project). It is considered a best practice for the project manager to issue project status updates on a weekly basis.

The Project Status Report request follows a general workflow that is illustrated in Figure 8-1 and described in Table 8-1.
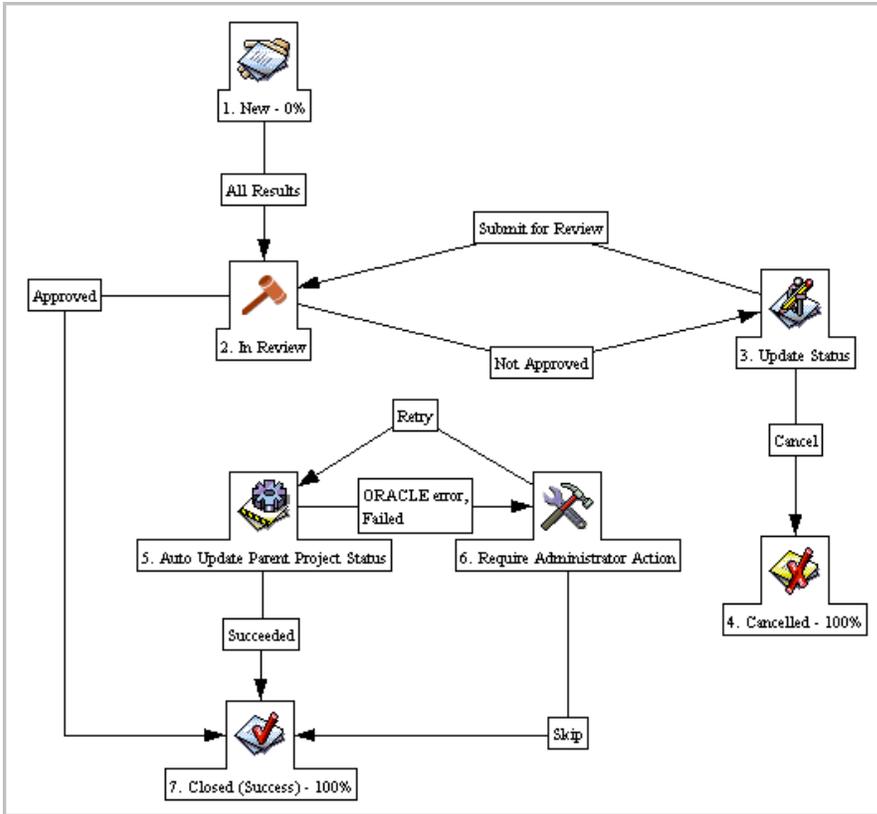
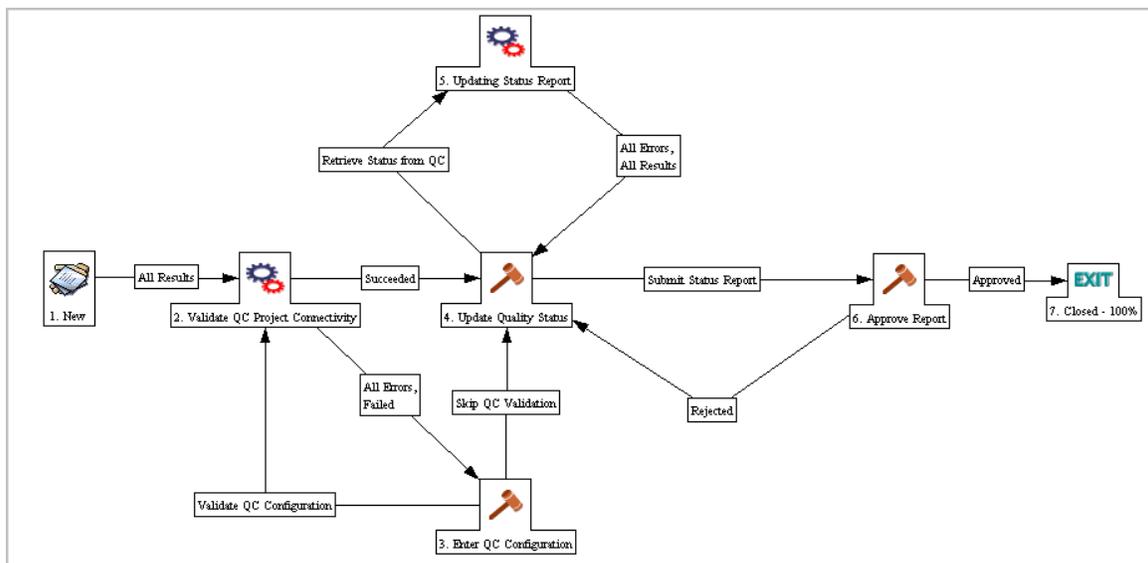Figure 8-1.Project status report workflow

The project status update report begins with the project manager submitting a request form, complete with project progress assessment, status updates and any supporting information. The reviewer may return the request to its owner if it does not contain sufficient project details. The owner must then add the required information and either resubmit or cancel the request. The project status update request information is reflected in the parent project overview page.

Table 8-1: Project status report workflow

	Workflow Steps	Details
1.	New	A new request for project status update is created.
2.	In Review	The reviewer verifies the project status update request. A notification email is sent to the CoE Manager, project owner, and any assigned reviewer on the status of this project request. If request is not approved, a notification email is sent to the owner requesting an update.
3.	Update Status	If the request was rejected, the request owner must update the project status information and resubmit it for approval. A notification email is sent to the owner regarding the status of the project update status request.
4.	Cancelled	The request was cancelled by the owner of the request.
5.	Auto Update Parent Project Status	The parent project status fields are automatically updated to reflect status from this request. This option is disabled by default.
6.	Require Administrator Action	If an error occurs during the execution of step 5, the administrator is notified to take appropriate action, and retry workflow step 5.

		A notification email is sent to the ITG administrator requesting corrective action.
7.	Closed (Success)	The request has been completed.

To submit a project initiation request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Quality Management > Project Status Update.**

The Create New COE - Project Status Update page appears, displaying the appropriate project initiation request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the ⟦?⟧ icon next to the field (where available).

a. Summary.

The Summary section contains unique request properties, such as creator of the request, owner of the request and its workflow status. Detailed information on the fields within this section is provided in Table 8-2.

Table 8-2.Project status update request – summary section

Field Name	Field Definition
Request Status	The status of the request in its workflow.

Created By	The name of the user who created the request.
Assigned Group	The security group to which the request has been assigned. This field is used to filter the name of users in the 'Assigned To' field selection.
Assigned To	The user who is assigned the project status update request.

b. Project.

The Project section identifies the master project which this request entity is affiliated with.

c. Assessment.

The Assessment section contains an overall evaluation of the project including its current status, progress and any existing issues.

d. Status.

For each status field (Overall Project Status, Scope Status, Resource Status, Schedule Status, and Issue Status) the project manager is required to provide the current status and comments.

The status codes are as follows:

- ☐ No issues exist that could significantly impact delivery of the project.
- ☐ Issues exist which may impact the successful delivery of the project.
- ■ Issues exist which must be addressed immediately in order to ensure the successful delivery of the project.

4. In the Notes section, enter additional information.

5. In the Create New COE - Project Status Update page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

All project status update requests are reflected chronologically in the CoE Project Status portlet, which is part of the Project Overview page. It is considered best practice for the project manager to issue project status updates on a weekly basis.

The CoE Project Status portlet displays status of the project based on all tracked dimensions. The status codes are as follows:

- ☐ Green - No issues exist that could significantly impact delivery of the project.

- ☐ Yellow - Issues exist which may impact the successful delivery of the project.

- ■ Red - Issues exist which must be addressed immediately in order to protect the successful delivery of the project. Figure 8-2 shows the CoE Project Status portlet.

Figure 8-2.CoE Project Status portlet

8.2. Initiating a Test Status Report Request

The Test Status Report is used by the project, development and QA teams to track the progress of the testing effort and quality levels of the application. The test status report is linked to a single QC project. It queries the QC project for data on requirements coverage, review status, test execution progress and defects trends. Results of the test status report are distributed to the application stakeholders in various dashboard portlets. It is critical that the QA manager runs the test status report on a regular basis to gain visibility into the application quality levels, identify trends and resolve any potential issues before they threaten the application's business success.

HP Center Management for QC provides the workflow to create a status report complete with major quality indicators. If additional quality metrics need to be retrieved from the Quality Center project, the QA manager should contact the ITG administrator to extend the status report's capabilities.

The test status report request follows a general workflow that is illustrated in Figure 8-3 and described in Table 8-3.

Figure 8-3. Test status report workflow

Table 8-3. Test status report workflow

	Workflow Steps	Details
1.	New	A new test status report is submitted for processing.

2.	Enter QC Configuration	Details on the QC instance, domain, and project are entered. Test results will be retrieved from this project.
3.	Validate QC Project Connectivity	An execution step that attempts to connect to the specified QC project to validate connectivity.
4.	Update Quality Status	The creator or reviewer may manually update the test results, or automate the retrieval of test results from the target Quality Center project. If automation is selected, the user should validate the results before submitting for review.
5.	Updating Status Report	An execution step that connects to target Quality Center project and retrieves statistics on requirements coverage, requirements review status, test execution status, and defect statistics. Information is only retrieved for metrics that have their filters or prerequisites defined.
6.	Approve Report	Assign a reviewer that will approve the test status report. This may be a QA manager, Development manager, or Project manager.
7.	Closed	The test status report has been completed.

To submit a test status report initiation request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Quality Management > Create Test Status Report.**

The Create New AQM - QA Test Status Report page appears, displaying the appropriate project initiation request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders involved in the testing process gain better understanding and visibility into the project. For information concerning a specific field, click the ? icon next to the field (where available).

a. Summary.

The Summary section provides information on the creator and reviewer of the test status report as well as the status of the report. Detailed information on the fields within this section is provided in Table 8-4.

Table 8-4. Test status report – summary section

Field Name	Field Definition
Test Status ID	A unique identifier for the test status report.
Created By	The owner of the test status report.
Created On	The date the test status report was created.
Priority	The importance or priority of the report.
Reviewer	The name of the user who will review and approve the report.
Reviewer Group	The name of the security group to which the reviewer belongs.

b. Test Scope Overview.

The test scope overview section provides information about the application version, test cycle, and the scope of the testing effort. Detailed information on the fields within this section is provided in Table 8-5.

Table 8-5. Test status report – test scope overview section

Field Name	Field Definition
Application	Name of the product or application that is being tested.
Version	The version of the product or application under test.
Build	The development build identifier.
Test Cycle ID	An identifier for the test iteration or cycle.

c. Quality Center Configuration

The Quality Center Configuration section contains details on connecting to Quality Center project, along with preferences for processing the test status report. Detailed information on the fields within this section is provided in Table 8-6.

Table 8-6. Test status report – Quality Center configuration section

Field Name	Field Definition
Quality Center Information	
Quality Center Instance	The name of the Quality Center instance.
QC Username	The name of the QC user. This account is used to retrieve the list of

	available QC domains and projects.
QC Password	The password of the QC user.
QC Domain	The name of the QC Domain. Only domains that the QC user has access to are allowed.
QC Project	The name of the QC Project from which data will be retrieved. Only projects that the QC user has access to are allowed.
Status Message	The descriptive message that displays the results of validating connectivity with the specified Quality Center instance and project.
QC Quality Data Reference Information	
Define Parent Requirement ID	The request owner defines the parent requirement ID in the specified project. All information related to requirements coverage, review status and test execution will be obtained using this reference. If requirement ID is set to 0, all requirements in the project and their sub-nodes will be processed. If requirement ID is set to a negative number, the processing of requirements and test execution data will be skipped.
Define Parent Test Set ID	The request owner provides the identifier for the test set in Quality Center's Test Lab module.
Define Priority Defect Levels	The request owner provides a list of defect priorities. This information is used to identify high priority defects and enables better project risk assessment.

d. Overall Test Status.

The overall test status section allows the creator or reviewer to evaluate the quality of the application and provide a summary of the results. The status information is reported in terms of red, yellow and green indicators.

e. Requirements Coverage Analysis.

The Requirements Coverage Analysis section contains results on requirements review and testing coverage. It includes the QA manager's assessment of the testing requirements' status, a complete analysis of requirements coverage and related test execution details, and the summary of the requirements review status. Detailed information on the fields within this section is provided in Table 8-7.

Table 8-7. Test status report – requirements coverage analysis section

Field Name	Field Definition
Coverage Status	Overall status of testing requirements (based on coverage and review).
Results Analysis	A brief summary of the test requirements status.
Coverage Status	
Total	The total number of requirements analyzed (under the specified parent requirement ID).
Passed	The number of requirements with a 'Passed' direct coverage status.

Failed	The number of requirements with a 'Failed' direct coverage status.
Not Covered	The number of requirements with a 'Not Covered' direct coverage status.
N/A	The number of requirements with a 'NA' direct coverage status.
Other	The number of requirements with all other direct coverage status.
Review Status	
Total	The total number of requirement nodes under and including the specified parent requirement ID.
Reviewed	The number of requirements with 'Reviewed' status.
Not Reviewed	The number of requirements with 'Not Reviewed' status.
Other	The number of requirements with all other review status.

f. Test Execution Analysis.

The Test Execution Analysis section shows detailed information on the test run status, including the overall assessment of the test development and execution progress, total number of tests linked to requirements, and the number of tests that have either passed, failed or are still pending. Detailed information on the fields within this section is provided in Table 8-8.

Table 8-8. Test status report – test execution analysis section

Field Name	Field Definition
Test Status	Overall status of test development and execution progress.
Results Analysis	A brief summary of test execution activities and results.
Test Execution Statistics	
Total	Total number of unique tests linked to requirements.
Passed	The number of tests completed with 'Passed' status.
Failed	The number of tests completed with 'Failed' status.
Other	The number of tests pending.

g. Defect Analysis.

The Defect Analysis section provides detailed statistics on the numbers, trends, status and priority of current known application defects. The defects are grouped according to the type of testing, and filters are applied to identify the defects that should be processed for this report. Detailed information on the fields within this section is provided in Table 8-9.

Table 8-9. Test status report – defect analysis section

Field Name	Field Definition
Defect Status	Assessment of application quality based on the defect statistics.
Results Analysis	A brief summary of current known defects and risks for the project.

Status	A red, yellow or green indicator of the application quality for each testing type – requirements, functional, performance, security, user acceptance, operational).
QC Filters	QC filters allow the QA manager to filter only the types of defects that they wish to report on. The filter name may include information on application, version, defect type, etc. to help identify defects that should be processed for this report. The following names, conditions, and values can be used for filtering the defects: **Field Name** - A name of a defect field or attribute as specified in the Quality Center project. **Operator** - A comparator for the field name and value (e.g. Equals, Like, In, etc.), a logical operation between two conditions (e.g. AND, OR) or a grouping of conditions (e.g. begin/end group). **Available Condition** - (Optional) An auto-complete list of available condition values **Actual Condition** - A value for the field. If operator is 'In' or 'Not In' , then the Actual Condition must be within single quotes and delimited by a comma (e.g. 'ValueA' , 'ValueB', 'ValueC') If operator is 'Like' or 'Not Like' , then the Actual Condition can contain a wildcard (%) in the value (e.g. %ProjectX%). For example, if a single QC project is tied to many application projects, setting the filters would allow creating a report containing only defects of a certain type that are specific to a project. (e.g. Application = Application Project A AND Type = Functional) At least one filter must be specified for this report. Is no filters are set, then no query is made, and no data can be collected.
Total Defects	Total number of defects that match the filtering conditions.
Open Priority	The number of defects that are currently pending (not closed), and have priority levels defined as high (based on the Define Priority Level Defects field).
Open Defects	The number of defects that are currently pending (not closed).

4. In the Notes section, enter additional information.

5. In the Create New AQM - QA Test Status Report page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

All test status update reports are reflected chronologically in the Project Overview page as pictured in Figure 8-4. It is considered best practice for the project manager to issue project status updates on a weekly basis.

AQM - Quality Status Trending

Req #	Created On △	TSR Name	Requirements Coverage (%)	Requirements Passed (%)	Total Defects	Priority Defects (%)	Open Defects (%)	Overall Quality	Requirements Status	Test Execution Status	Defect Status
31480	AUG 25, 2006	HR Port...	93	47.71	330	39.39	100	🟥	🟥	🟧	🟥
31461	SEP 01, 2006	HR Port...	93	60.78	530	22.64	71.7	🟥	🟥	🟥	🟥
31462	SEP 08, 2006	HR Port...	94	75	750	20	53.33	🟥	🟧	🟥	🟥
31463	SEP 15, 2006	HR Port...	100	75	850	10.59	37.65	🟥	🟩	🟧	🟥
31464	SEP 22, 2006	HR Port...	100	75	950	8.42	36.84	🟥	🟩	🟧	🟥

Figure 8-4. Quality status trending portlet

The test status report data is also used in multiple Dashboard portlets. For more information on the quality-related Dashboard portlets, see Chapter 9.

Chapter 9
Viewing and Tracking Project Progress and Quality

In This Chapter:

9.1. HP Center Management for QC Dashboard Portlet Content Overview
9.2. Viewing and Tracking Project Activity
9.3. Application Quality Portlets
9.4. Quality Center Cross-Project Reporting Portlets
9.5. Edit Preferences for Dashboard Portlets
9.6. Cross-Environment Query and Quality Center User Query Reports

9.1. HP Center Management for QC Dashboard Portlet Content Overview

HP Center Management for QC delivers pre-configured Dashboard content that gives you a comprehensive real-time view of project status and key performance metrics. Once an application or testing project request has been created, it can be viewed on the Dashboard.

Note: Depending on your role, you may find different portlets and Dashboard pages available to you. For detailed instructions on distributing Dashboard modules, see Table 4-6 - Dashboard Page and Portlet Content by Role in this guide and the "Distributing Modules" chapter in the Configuring the Standard Interface guide.

Table 9-1 provides the list of pre-configured application quality-related portlets available through HP Center Management for QC.

Table 9-1. HP Center Management for QC quality Dashboard portlets.

Portlet Name	Description
AQM - Project Listing	Overview of application or testing projects, their status, owners and project details
AQM - Business Value Map	Business value vs. risk for selected projects
AQM - Defect Breakdown by Status (#)	Number of defects grouped by status for selected projects
AQM - Defect Breakdown by Status (%)	Percent of defects grouped by status for selected projects
AQM - Defect Density Over Time	Open defects in relation to requirements over time for selected projects
AQM - Defect by Status Trending	Defect trends grouped by status over time for selected projects
AQM - Defect by Status Trending (Drill Down)	Defect trends grouped by status over time for a specified project
AQM - Open Priority Defect Trending (%)	Trends of open defects over time for selected projects
AQM - Requirement Coverage Trending (%)	Percent coverage of test requirements over time for selected projects
AQM - Requirement Coverage Trending (Drill Down)	Percent coverage of test requirements over time for a specified project
AQM - Requirement Coverage by Status	Requirements grouped by status: Passed, Failed, Not Run, Not Completed for selected projects.
AQM – Skill Set Coverage	Breakdown of skills of selected users
AQM - Test Execution Status Trending (%)	Percent of test scripts that have passed over time for selected projects
AQM - Test Execution Status	Test script execution status over time for a specified project.

Trending (Drill Down)	
AQM - Test Progress By Status	Test execution by status: Passed, Failed, etc. for selected projects.

9.2. Viewing and Tracking Project Activity

The AQM - Project Listing portlet displays a list of application and testing projects, their progress and quality status, workflow states, and names of people responsible for different stages of the project delivery (i.e. project manager, development lead, QA manager, or operations lead).

By default, the list shows active projects affiliated with the current user. However, filters can be set to show specific projects or projects managed by another user. If the preference is set to not include the closed projects, this portlet will display only active application and testing projects.

Detailed information on the fields within this section is provided in Table 9-2.

Table 9-2. Details of the AQM – Project Listing portlet

Field Name	Field Definition
Req #	The request's unique ID and link to request details.
Type	The type of the project request (application project or testing project).
Status	The status of the project based on the project plan, milestones and tasks. - ☐ Project on schedule. - ☐ Project may be at risk with a few scheduling exceptions. - ■ Project is at risk, with multiple scheduling exceptions.
*	A link (icon) to the project overview page for this project.
PR #	The project ID of the ITG project linked to this application or testing project.
Description	Description of the project. The description generally contains the project name, application and version information.
Project Mgr.	The name of the person who is managing the project.
Overall Quality	Overall status of the project based on Quality indicators. This rating is based on the last test status report submitted by QA for this project. - ☐ Quality level of the product is good. - ☐ Quality level of the product is mediocre. - ■ Quality level of the product is poor.
Requirements Status	Requirements coverage data based on passed, failed and pending status. This rating is based on the last test status report submitted by QA for this project. - ☐ Most or all requirements have passed.

	- 🟨 A number of high priority requirements have failed. - 🟥 Most requirements have failed or have not been covered.
Testing Status	The status of test script execution and maintenance. This rating is based on the last test status report submitted by QA for this project. - ⬜ Most test scripts have passed - 🟨 A number of test scripts covering high-priority requirements have failed. - 🟥 A large number of test scripts have failed or have not been completed.
Defect Status	The status of product based on defects. This rating is based on the last test status report submitted by QA for this project. - ⬜ No urgent or high priority defects exist. - 🟨 A number of urgent or high priority defects have not been resolved. - 🟥 Many urgent or priority defects exist.
R	A link (🖼️) to a requirements coverage trend view for this project.
T	A link (🖼️) to a test execution trend view for this project.
D	A link (🖼️) to a defect trend view for this project.
Workflow Status	The current workflow status of the project.
Last Update Date	The date the project request was last updated.
Priority	The priority of the project.
Project Sponsor	The name of the person sponsoring the project.
R&D Manager	The name of the person who leads the development effort for the project.
QA Manager	The name of the person who leads the QA activities for the project
Ops Manager	The name of the person who leads the implementation and deployment activities for the project.

Drill-downs into the individual project indicators provide a detailed view of the project status and trends.

The Requirements Coverage over Time portlet shows the progress of the testing effort in terms of requirements coverage. This portlet displays the breakdown of requirements by status - passed, failed, not covered, not applicable, etc. - on a weekly basis.
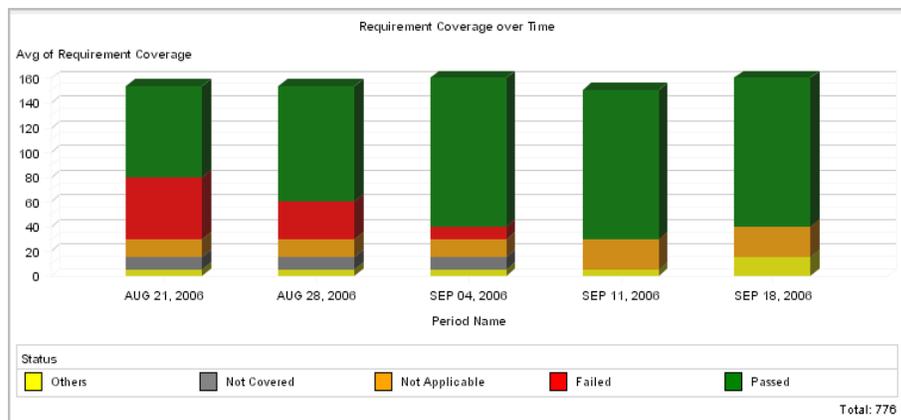
The Test Progress Trending (Drill Down) portlet shows the breakdown of the test executions results by status - passed, failed, etc. - on a weekly basis.
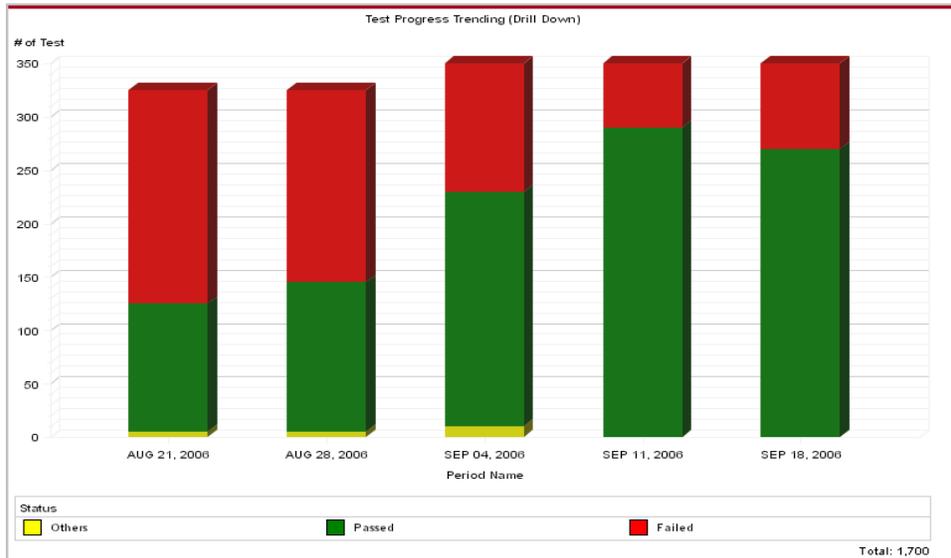
The Defect Status over Time portlet shows breakdown of defects by status and priority - closed, open high priority and open low priority - on a weekly basis.
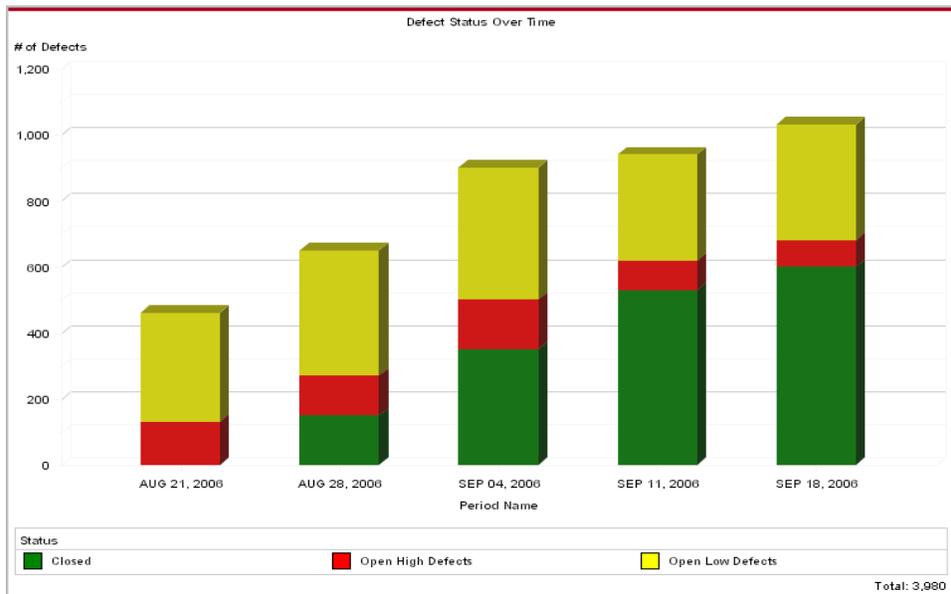
AQM - Business Value Map Portlet

The AQM - Business Value Map portlet is a bubble chart showing the breakdown of application projects based on business value and business risk. Figure 9-1 shows the AQM - Business Value Map portlet.
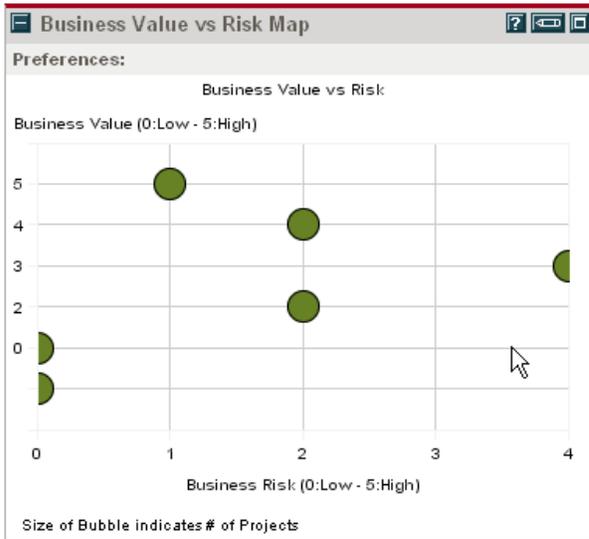
Figure 9-1. AQM - Business Value Map portlet

9.3. Application Quality Portlets

AQM - Defect Breakdown by Status (#) Portlet

The AQM - Defect Breakdown by Status (#) portlet shows the number of defects grouped by status for selected projects. The defect status is based on the most recent test status report. If a test status report had not been completed for the project, no data is shown for that project. Defects are color-coded based on the following scheme:

- Green - number of defects that are closed.
- Red - number of defects that are open with high priority.
- Yellow - number of defects that are open with low priority.

Figure 9-2 shows the AQM - Defect Breakdown by Status (#) portlet
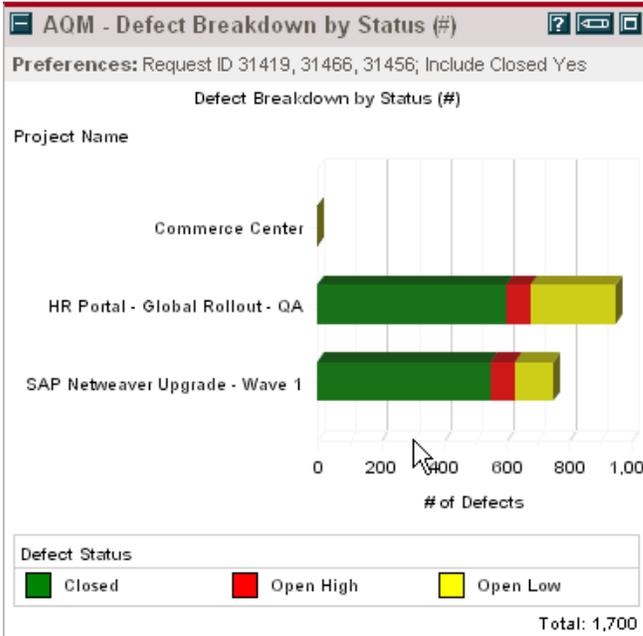
Figure 9-2. AQM - Defect Breakdown by Status (#) portlet

AQM - Defect Breakdown by Status (%) Portlet

The AQM - Defect Breakdown by Status (%) portlet shows the percent breakdown of defects by status for selected projects. The defect status is based on the most recent test status report. If a test status report had not been completed for the project, no data is shown for that project. Defects are color-coded based on the following scheme:

- ☐ Green - number of defects that are closed.
- ■ Red - number of defects that are open with high priority.
- ▣ Yellow - number of defects that are open with low priority.

Figure 9-3 shows the AQM - Defect Breakdown by Status (%) portlet
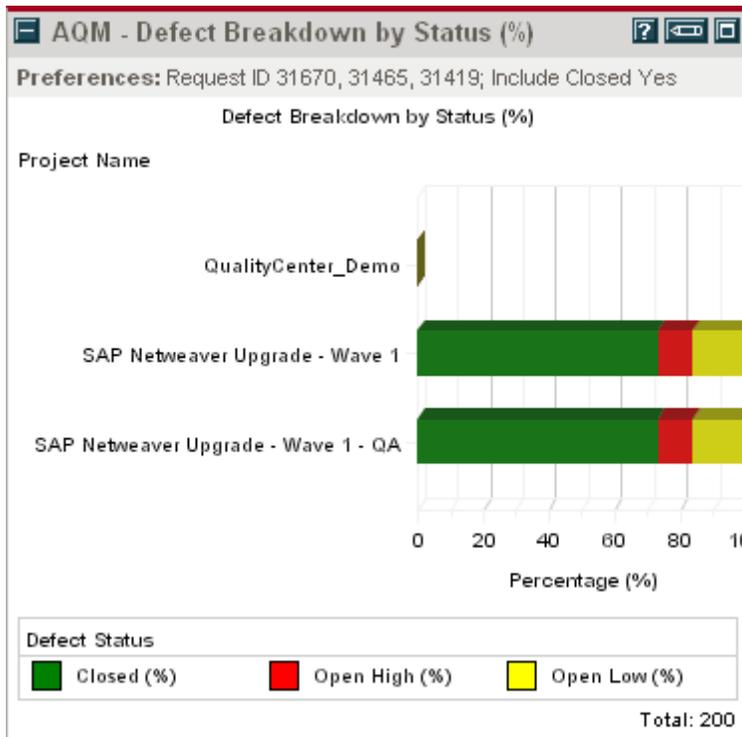
Figure 9-3. AQM - Defect Breakdown by Status (%) portlet

AQM - Defect Density over Time Portlet

The AQM - Defect Density over Time portlet shows the number of open defects in relation to requirements over time for selected projects. Figure 9-4 shows the AQM - Defect Density over Time portlet
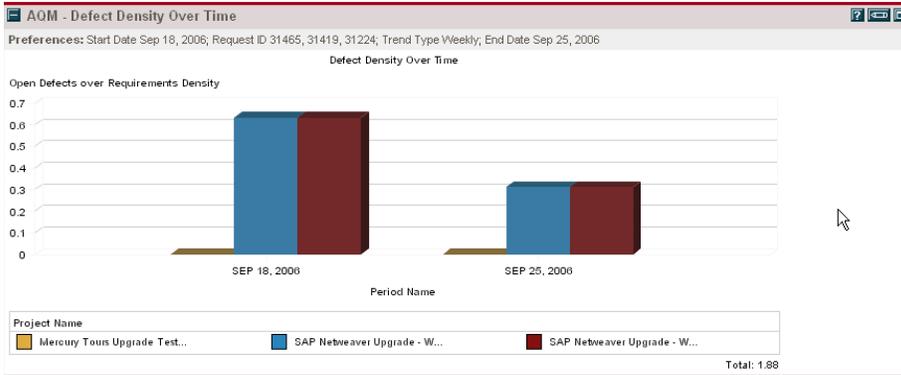
Figure 9-4. AQM - Defect Density over Time portlet

AQM - Defect by Status Trending Portlet

The AQM - Defect by Status Trending portlet shows the trend of total defects over a time period for selected projects. Defects are color-coded based on the following scheme:

☐ Green - number of defects that are closed.
🟥 Red - number of defects that are open

Trending data is based on the test status report created during the sampling interval. If a test status report had not been completed for the project, no data is shown for that project.
Figure 9-5 shows the AQM - Defect by Status Trending portlet.
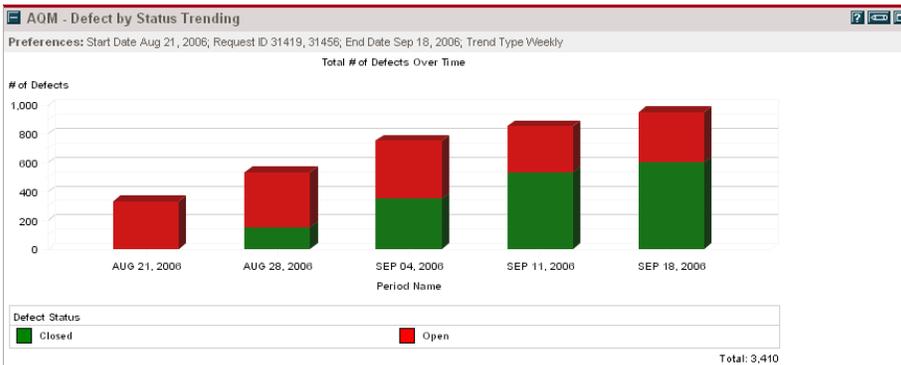
Figure 9-5. AQM - Defect by Status Trending portlet

AQM - Open Priority Defect Trending (%) Portlet

The AQM - Open Priority Defect Trending (%) portlet shows the trend of percentages of open defects with high priority over time for selected projects. Trending data is based on the test status report created during the sampling interval. If a test status report had not been completed for a project, no data is shown for that project. Figure 9-6 shows the AQM - Open Priority Defect Trending (%) portlet.
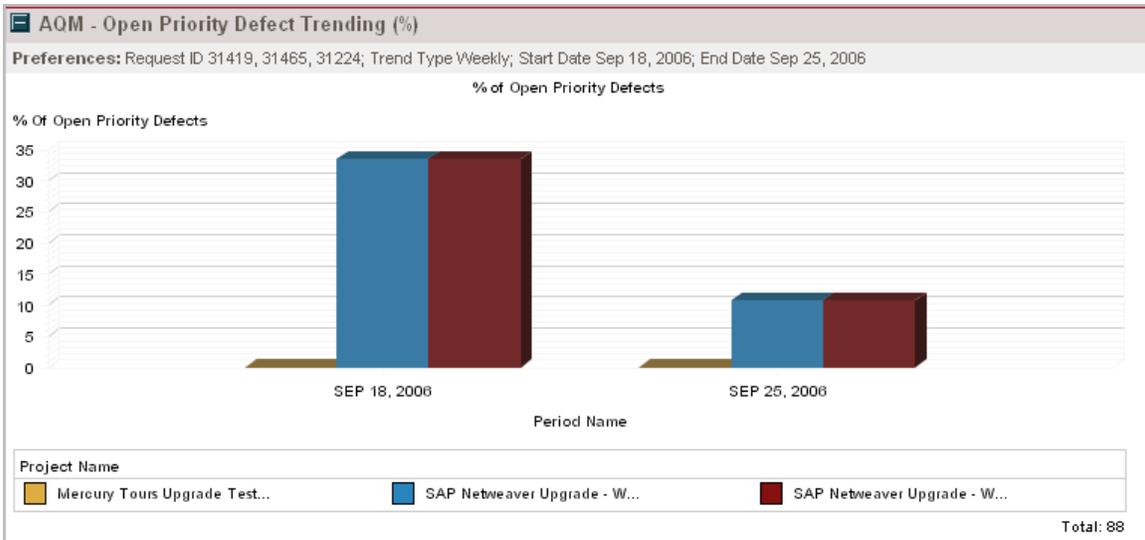
Figure 9-6. AQM - Open Priority Defect Trending (%) portlet

AQM - Requirement Coverage Trending (%) Portlet

The AQM - Requirement Coverage Trending (%) portlet shows percent coverage of test requirements over time for selected projects. Trending data is based on the test status report created during the sampling interval. If a test status report had not been completed for the project, no data is shown for that project. Figure 9-7 shows the AQM - Requirement Coverage Trending (%) portlet.
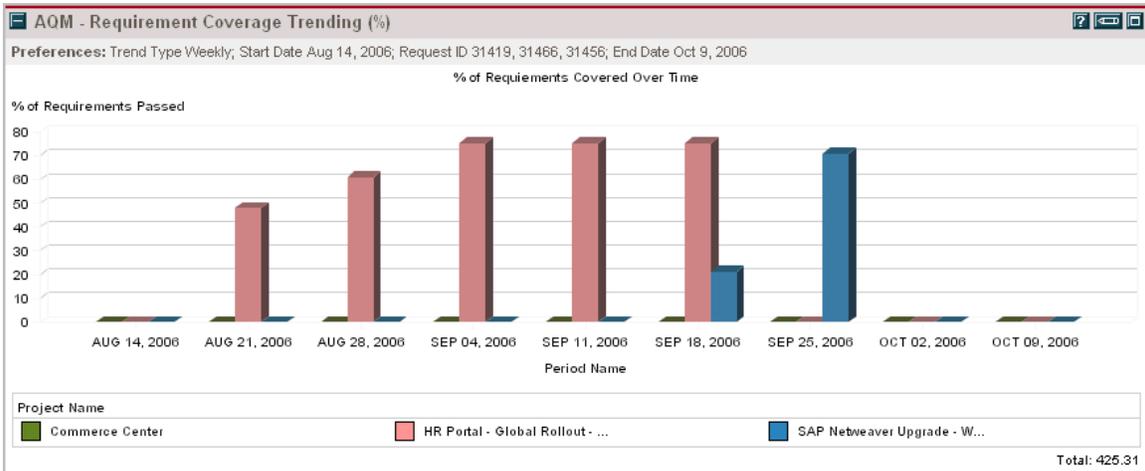
Figure 9-7. AQM - Requirement Coverage Trending (%) portlet

AQM - Requirement Coverage by Status Portlet

The AQM - Requirement Coverage by Status portlet shows a breakdown of requirements coverage status for selected projects based on the most recent test status report. If a test status report had not been completed for a project, no data is shown for that project. Requirements are color-coded based on the following scheme:

☐ Green - percentage of requirements passed.
■ Red - percentage of requirements that failed.
■ Orange - percentage of requirements that are not applicable.
☐ Gray - percentage of requirements that are not covered.

90

☐ Yellow - percentage of other requirements that fall into "Other" category.

Figure 9-8 shows the AQM - Requirement Coverage by Status portlet.
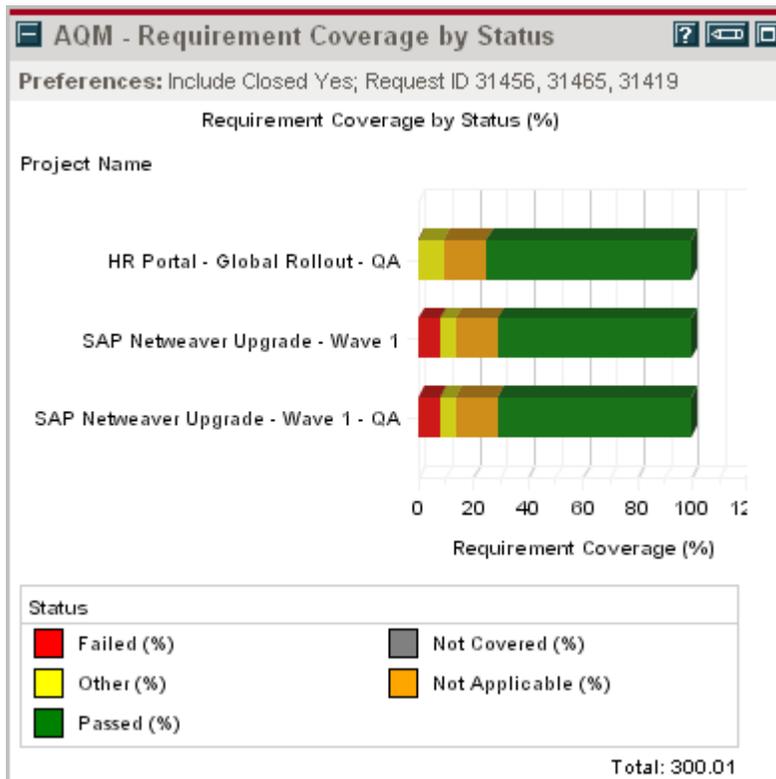
Figure 9-8. AQM - Requirement Coverage by Status portlet

AQM – Skillset Coverage Portlet

The AQM – Skillset Coverage portlet shows a graphical view of skills and proficiencies of selected users (based on names, security groups or resource pools). Figure 9-9 shows the AQM – Skillset Coverage portlet.

Figure 9-9 shows the AQM – Skillset Coverage portlet.
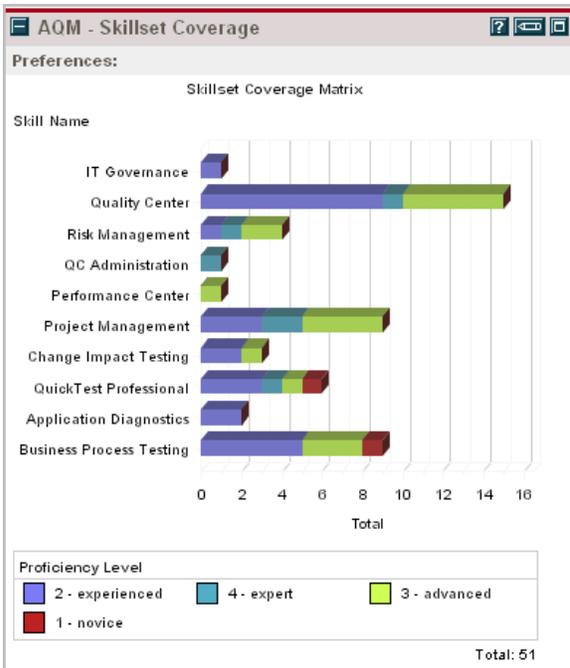
Figure 9-9. AQM – Skillset Coverage portlet

AQM - Test Execution Status Trending (%) Portlet

The AQM - Test Execution Status Trending (%) portlet shows trends of the test scripts that have passed over time for selected projects. Trending data is based on the test status report created during the sampling interval. If a test status report had not been completed for a project, no data is shown for that project. Figure 9-10 shows the AQM - Test Execution Status Trending (%) portlet.
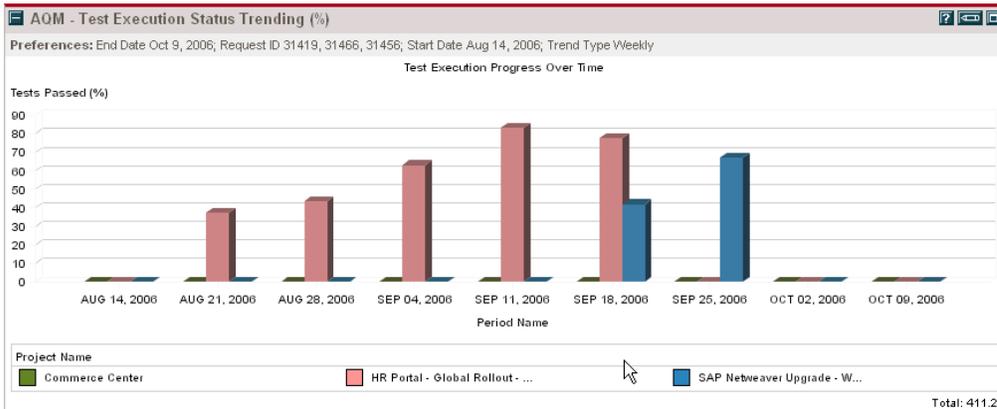
Figure 9-10. AQM - Test Execution Status Trending (%) portlet

AQM - Test Progress By Status Portlet
The AQM - Test Progress By Status portlet shows a breakdown of test execution status for selected projects based on the most recent test status report. If a test status report had not been completed for a project, no data is shown for that project. Tests are color-coded based on the following scheme:

☐ Green - percentage of executed tests that passed.
■ Red - percentage of executed tests that failed.

92

◻ Yellow - percentage of tests that have not been executed, or are in the process of being executed. Figure 9-11 shows the AQM - Test Progress By Status portlet.
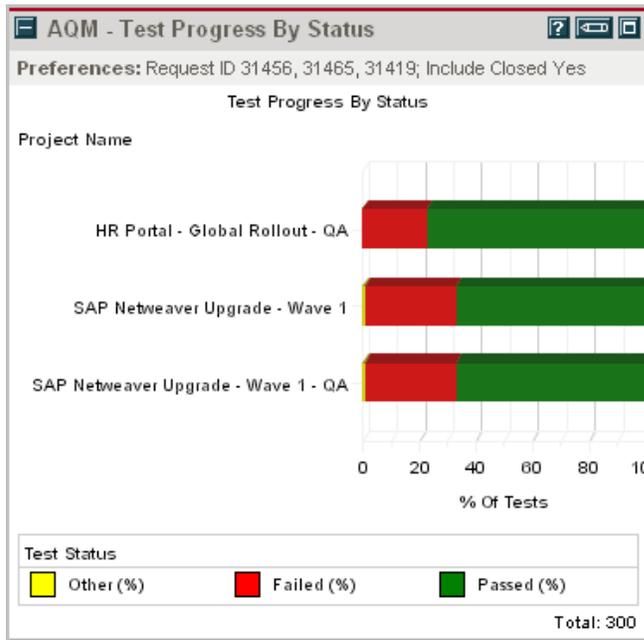
Figure 9-11. AQM - Test Progress By Status portlet

9.4. Quality Center Cross-Project Reporting Portlets

HP Center Management for QC delivers pre-configured Dashboard content that allows you to report on the key performance and project metrics based on information extracted directly from the Quality Center projects. Using the Dashboard, you are able to view project status, work items, requirements, tests and defects data for any QC project or for a combination of selected projects. Reporting across multiple QC projects gives organizations a comprehensive view of application quality, and is especially valuable for QA groups who create separate QC projects for each testing phase or cycle.

For each portlet, the user can specify the list of QC projects from which information should be retrieved. It is considered best practice to keep this list short and only on the projects that are currently being worked on or have relevant data.

All Quality Center portlets contain links to specific items inside the Quality Center project. For example, a QA manager can view all work items assigned to him/her across multiple QC instances and projects. By following the link – such as a requirement or defect ID - the QA manager can instantly open the relevant item directly in QC to review additional details, update, edit or work on the item.

Table 9-3 provides the list of all pre-configured HP Center Management for QC portlets that pull information directly from selected Quality Center projects.

Table 9-3. HP Center Management for QC Quality Center Dashboard portlets

Portlet Name	Description
Quality Center Defects (CM)	List of defects from selected QC projects
Quality Center Project Status (CM)	Requirements, test execution and defect status from selected QC projects
Quality Center Requirements (CM)	List of requirements from selected QC projects

Quality Center Test Lab (CM)	List of test sets from selected QC projects
Quality Center Tests (CM)	List of tests from selected QC projects
Quality Center User Query (CM)	Results of user-defined query from selected QC projects

Quality Center Defects (CM) Portlet

The Quality Center Defects (CM) portlet shows a list of defects that are currently assigned to specific individuals in selected Quality Center projects. The defect ID provides the link to this defect in Quality Center. Selecting the link will launch Quality Center and open the defect (the user must have Quality Center client ActiveX controls installed in order for the link to work). Figure 9-12 shows the Quality Center Defects (CM) portlet

Figure 9-12. Quality Center Defects (CM) portlet

Quality Center Project Status (CM) Portlet

The Quality Center Project Status (CM) portlet shows the overall status of requirements, test execution, and open defects across selected QC projects. Status metrics include requirements coverage analysis, requirements review status, test execution details, and breakdown of open defects by priority. Figure 9-13 shows the Quality Center Project Status (CM) portlet.

Figure 9-13. Quality Center Project Status (CM) portlet

Quality Center Requirements (CM) Portlet

The Quality Center Requirements (CM) portlet shows a list of requirements that are currently assigned to specific individuals in selected Quality Center projects. The requirement ID provides the link to this requirement in Quality Center. Selecting the link will launch Quality Center and open the requirement (the user must have Quality Center client ActiveX controls installed in order for the link to work). Figure 9-14 shows the Quality Center Requirements (CM) portlet.

Figure 9-14. Quality Center Requirements (CM) portlet

Quality Center Test Lab (CM) Portlet

The Quality Center Test Lab (CM) portlet shows a list of tests that are currently assigned to specific individuals in selected Quality Center projects. The test set ID and name fields provide the link to this test set in Quality Center. Selecting the link will launch Quality Center and open the test set (the user must have Quality Center client ActiveX controls installed in order for the link to work). Figure 9-15 shows the Quality Center Test Lab (CM) portlet.

Figure 9-15. Quality Center Test Lab (CM) portlet

Quality Center Tests (CM) Portlet

The Quality Center Tests (CM) portlet shows a list of test scripts that are currently assigned to specific individuals in selected Quality Center projects. The test script ID provides the link to this test script in Quality Center. Selecting the link will launch Quality Center and open the test script (the user must have Quality Center client ActiveX controls installed in order for the link to work). Figure 9-16 shows the Quality Center Tests (CM) portlet.

Figure 9-16. Quality Center Tests (CM) portlet

Quality Center User Query (CM) Portlet

The Quality Center User Query (CM) portlet allows the user to define a custom query against any number of Quality Center projects and display the results in a tabular format. The portlet also provides aggregation capabilities to sum total values for any of the defined numerical columns. For example, a QA manager may configure a custom query to compare test execution status across several projects. The results will clearly indicate which projects are behind on test development and execution activities and require corrective action.

The Quality Center User Query (CM) portlet is a power tool for generating any type of custom view. Only an administrator is allow to configure this type of portlet and distribute it to its intended audience.

Preferences are available to filter the information in the portlet view. These options are described in Table 9-4.

Table 9-4. Quality Center User Query (CM) portlet preferences

Filter Name	Filter Definition
Filter By User	Specify the list of users for whom the information should be retrieved. (Default: current user) In order to use this value in the SQL query, the following tokens have been defined: • **[Q.USER]** - Set to 1 if user filter is either current or specified list of users, otherwise 0 for everyone. • **[Q.VP.USER]** - A comma-delimited list of user names (e.g. 'user1' , 'user2' , ..., 'userN'). The portlet will automatically substitute the use of the above tokens with its literal value before executing the query. The above token may be used as many times as needed in the SQL expression.

96

QC Projects	List of QC projects from which information should be retrieved.
Creation Date From	Specifies a "From Date" filter. In order to use this value in the SQL query, the following tokens have been defined: • **[Q.CREATED.FROM]** - Set to 1 if 'From' date filter is specified, otherwise 0. • **[Q.VP.CREATED.FROM]** - Set to the date. SQL bind variables are used to pass the date value. The portlet will automatically substitute the use of the above tokens with its literal value before executing the query. The above token may be used as many times as needed in the SQL expression.
Creation Date To	Specifies a "To Date" filter. In order to use this value in the SQL query, the following tokens have been defined: • **[Q.CREATED.TO]** - Set to 1 if 'To' date filter is specified, otherwise 0. • **[Q.VP.CREATED.TO]** - Set to the date. SQL bind variables are used to pass the date value. The portlet will automatically substitute the use of the above tokens with its literal value before executing the query. The above token may be used as many times as needed in the SQL expression.

The SQL query is defined is in the SQL Query Logic section.

Field Name	Field Definition
| SQL Query | A valid SQL expression that is executed against each selected QC project. For details on the QC project schema and table layout, refer to the HP Quality Center Database Reference.<br><br>Guidelines for forming a SQL query are provided below:<br><br>1. Only SQL SELECT statement is supported.<br>2. SQL statement must be database be valid for all database types used in environment (e.g. MSSQL and Oracle).<br>3. Instead of using DECODE(...), which works only for Oracle, consider using:<br><br>```
 case
when (condition1) THEN result1
     when (condition2) THEN result2
 ...
       else resultN
end
```<br><br>4. Use \|\| for string concatenation, instead of +. The portlet will automatically convert \|\| to + for queries against MSSQL.<br><br>Sample SQL Queries:<br><br>1. Retrieve # of pending defects from selected projects<br><br>```
select count(BG_BUG_ID) TOTAL_BUGS
from BUG
``` |

	``
                where not BG_STATUS = 'Closed'
```
2.  Retrieve # of open, closed and total defects from selected projects based on filter

```
select sum (case
              when (NOT BG_STATUS = 'Closed') then 1
              else 0
              end) OPEN_DEFECTS,
        sum (case
              when (BG_STATUS = 'Closed') then 1
              else 0
              end) CLOSED_DEFECTS,
        sum (1) TOTAL_DEFECTS
from BUG
where (([Q.USER] = 0)
        or
        (([Q.USER] = 1)
          and
          (BG_DETECTED_BY in ([Q.VP.USER]))
)
)
      and
      (([Q.CREATED.FROM] = 0)
        or
        (([Q.CREATED.FROM] = 1)
          and
          (BG_DETECTION_DATE > [Q.VP.CREATED.FROM])
)
)
``` |
| Extended Query | Extended query is executed on the combined results of the SQL query on all selected Quality Center projects. This allows the user to perform cross-project queries, such as aggregate defects across domains, or instances, etc. The SQL statement must be a valid SELECT statement against the RESULTS table. The target table contains three additional columns to represent the source of the data in the row. These are:

  - **QC_INSTANCE** - Quality Center instance name
  - **QC_DOMAIN** - Quality Center domain name
  - **QC_PROJECT** - Quality Center project name

Example: Show total defects by status aggregated across each QC domain.

Per-Project SQL Query:
```
SELECT BG_STATUS,
       COUNT(1) STATUS_COUNT
FROM BUG
GROUP BY BG_STATUS
```

Extended Query:
```
SELECT QC_DOMAIN,
       BG_STATUS,
       SUM(STATUS_COUNT) STATUS_TOTAL
FROM RESULTS
GROUP BY QC_DOMAIN, BG_STATUS
```
Note: Filter tags **[Q.*]** or **[Q.VP.*]** can **NOT** be used in the extended query. |
| SQL Columns | In order for the result columns to be displayed, the list of columns and their ordering must be defined. If extended query is used, then the column properties must correspond to the results of the extended query. Otherwise the column settings should correspond to the |

per-project SQL query. This section allows the user to add, edit, remove or reorder columns.

Each column has the following properties:

- **SQL Column Name** - The name of the column in the SQL query. The following additional keywords are available for column name:
    - QC.INSTANCE or QC_INSTANCE - The Quality Center instance name.
    - QC.DOMAIN or QC_DOMAIN - The Quality Center domain name.
    - QC.PROJECT or QC_PROJECT - The Quality Center project name.

    These column names are valid only for standard SQL query (ie. extended query is empty)

- **Column Title** - The title of the column, as it will appear in the table's column header.
- **Column Width** - The width of the column represented in pixels or as a percentage (i.e. 120, 15%).
- **Is Date** - Flag to display the column as a date.
- **Link Type** - Flag to display value as a link to an entity in a QC project.
- **Aggregate** - Sum the numeric value of the column and display total in table's column footer. Useful for aggregating results across projects.

Example Query: Show all test scripts still in design status.

```
SELECT TS_TEST_ID,
       TS_NAME,
       TS_STATUS,
       TS_RESPONSIBLE
FROM TEST
WHERE TS_TEST_STATUS = Design
```

Each of the columns would be defined as follows:

Column Name	Title	Width	Is Date	Link	Aggregate
TS_TEST_ID	Test ID	5%	No	Test Script	No
QC.INSTANCE	QC Instance	10%	No	None	No
QC.PROJECT	QC Project	10%	No	None	No
TS_NAME	Name	15%	No	None	No
TS_RESPONSIBLE	Responsible	15%	No	None	No

Figure 9-17 shows an example of the Quality Center User Query (CM) portlet.

Figure 9-17. Example of the Quality Center User Query (CM) portlet

Web Frame Portlet (CM)

The Web Frame Portlet (CM) displays a user-defined web page inside an iframe. It allows the users to bring other commonly used sites into a single, consolidated work environment. For example, the Web Frame Portlet can contain links to applications under test, and a full view of Quality Center's landing page. The user has an option to specify embedded URLs, width and height of the web frame, as well as enable or disable scrolling on the page.

Figure 9-18 shows an example of the Web Frame Portlet (CM).

Figure 9-18. Example of the Web Frame Portlet (CM)

Generic User Query (CM)

The Generic User Query (CM) portlet allows to generate a consolidated view of related information from different data sources. This helps organizations greatly improve the efficiency of data gathering and reporting. The user can define a custom query against any number of registered environments and display the results of the query in a tabular form. The portlet also provides aggregation capabilities to sum total values for any of the defined numerical columns.

Preferences are available to filter the information in the portlet view. These options are described in Table 9-5.

Table 9-5. Generic User Query (CM) portlet preferences

Filter Name	Filter Definition
Filter By User	Specify the list of users for whom the information should be retrieved. (Default: current user) In order to use this value in the SQL query, the following tokens have been defined: • **[Q.USER]** - Set to 1 if user filter is either current or specified list of users, otherwise 0 for everyone. • **[Q.VP.USER]** - A comma-delimited list of user names (e.g. 'user1' , 'user2' , ..., 'userN'). The portlet will automatically substitute the use of the above tokens with its literal value before executing the query. The above token may be used as many times as needed in the SQL expression.
QC Projects	List of QC projects from which information should be retrieved.
Creation Date From	Specifies a "From Date" filter. In order to use this value in the SQL query, the following tokens have been defined: • **[Q.CREATED.FROM]** - Set to 1 if 'From' date filter is specified, otherwise 0. • **[Q.VP.CREATED.FROM]** - Set to the date. SQL bind variables are used to pass the date value. The portlet will automatically substitute the use of the above tokens with its literal value before executing the query. The above token may be used as many times as needed in the SQL expression.
Creation Date To	Specifies a "To Date" filter. In order to use this value in the SQL query, the following tokens have been defined: • **[Q.CREATED.TO]** - Set to 1 if 'To' date filter is specified, otherwise 0. • **[Q.VP.CREATED.TO]** - Set to the date. SQL bind variables are used to pass the date value. The portlet will automatically substitute the use of the above tokens with its literal value before executing the query. The above token may be used as many times as needed in the SQL expression.

The SQL query is defined is in the SQL Query Logic section.

Field Name	Field Definition

Environment Query (#)	
Each set of environment queries comprises of target database environment, SQL query, and target result table. The target result table is used by the Extended Query (if defined). Any number of environment queries may be defined. To add additional environment queries, define query information in existing environment query sections, and save preferences. A new empty environment query will be added.	
Environment	The name of an environment object. Only environment objects accessible by the current user are listed. An environment may either point to an Oracle or MSSQL database.

Query	A valid SQL expression that is executed against selected environment database.
	
	Guidelines for forming a SQL query are provided below:
	
	1. Only SQL SELECT statement is supported.
	2. SQL statement must be valid for database type referenced by environment (ie. MSSQL and Oracle).
	3. Instead of using DECODE(...), which works only for Oracle, consider using:
	
	``
	case
	       when (condition1) THEN result1
	       when (condition2) THEN result2
	       ...
	       else resultN
	  end
	``
	
	Sample SQL Queries:
	
	1. Retrieve # of applications based on status
	
	``
	select APP_STATUS, SUM(1) APP_STATUS_COUNT
	from APPLICATIONS
	group by APP_STATUS
	``
	
	2. Retrieve # of open, closed, and total defects from selected projects based on filter
	
	``
	select sum (case
	              when (NOT BG_STATUS = 'Closed') then 1
	              else 0
	              end) OPEN_DEFECTS,
	       sum (case
	              when (BG_STATUS = 'Closed') then 1
	              else 0
	              end) CLOSED_DEFECTS,
	       sum (1) TOTAL_DEFECTS
	from BUG
	where (([Q.USER] = 0)
	         or
	         (([Q.USER] = 1)
	           and
	           (BG_DETECTED_BY in ([Q.VP.USER]))
	         )
	       )
	       and
	       (([Q.CREATED.FROM] = 0)
	         or
	         (([Q.CREATED.FROM] = 1)
	           and
	           (BG_DETECTION_DATE > [Q.VP.CREATED.FROM])
	         )
	``

	)
Result Table	The name of a temporary table in which the results of the query will be stored. This is only used if an extended query is defined. The extended query can reference the results of each environment query by result table name.

Extended Query

Extended Query	Extended query is executed on the results of the environment queries defined. This allows the user to perform cross-environment queries - such as aggregate data from multiple data sources. The SQL statement must be a valid SELECT statement against the result table name(s).
	
	If an extended query is not defined, the results shown in the view are based on Environment Query #1 (only).
	
	Example: Show # of defects and SLA for each application
	
	Query 1: (based on some DB environment X)
	
	`SELECT APP_ID, APP_NAME, COUNT(*) TOTAL_BUGS`
	`FROM BUGS`
	`GROUP BY APP_ID, APP_NAME`
	
	Result Table: DEFECTS
	
	Query 2: (based on some DB environment Y)
	
	`SELECT ID, SLA_LEVEL`
	`FROM PERFORMANCE`
	`GROUP BY ID`
	
	Result Table: SLA
	
	Extended Query:
	
	`SELECT`
	`        D.APP_NAME NAME,`
	`        D.TOTAL_BUGS,`
	`        S.SLA_LEVEL`
	`FROM`
	`        DEFECTS D,`
	`        SLA S`
	`WHERE`
	`        D.APP_ID = S.ID`
	
	Note: Filter tags **[Q.*]** or **[Q.VP.*]** can **NOT** be used in the extended query.

SQL Columns	In order for result columns to be displayed, the list of columns and their ordering must be defined. If extended query is used, then the column properties must correspond to the results of the extended query. Otherwise the column settings should correspond to the per-project SQL query. This section allows the user to add, edit, remove, or re-order columns. Each column has the following properties: • **SQL Column Name** - The name of the column in the SQL query. • **Column Title** - The title of the column, as it will appear in the table's column header.

- **Column Width** - The width of the column represented in pixels or as a percentage (e.g.. 120, 15%).
- **Is Date** - Flag to display the column as a date.
- **Aggregate** - Sum the numeric value of the column and display total in table's column footer. Useful for aggregating results across projects.

Example Query: Show all test scripts still in design status.

```
SELECT TS_TEST_ID,
       TS_NAME,
       TS_STATUS,
       TS_RESPONSIBLE
FROM TEST
WHERE TS_TEST_STATUS = Design
```

Each of the columns would be defined as follows:

Column Name	Title	Width	Is Date	Link	Aggregate
TS_TEST_ID	Test ID	5%	No	Test Script	No
TS_NAME	Name	15%	No	None	No
TS_RESPONSIBLE	Responsible	15%	No	None	No

Figure 9-19 shows an example of the Generic User Query (CM) portlet.

Figure 9-19. Example of the Generic User Query (CM) portlet

9.5. Edit Preferences for Dashboard Portlets

Preferences are available to filter the information for each portlet. Examples of the available filters include the following options:

Filter Name	Filter Definition
Filter By User	Specify the list of users for which information should be retrieved. (Default: current user)
QC Projects	List of QC projects from which information should be retrieved.
Creation Date From	List entities (requirements, tests, defects… etc.) that were created since the specified date.
Creation Date To	List entities (requirements, tests, defects… etc.) that were created before the specified date.

Include Reviewed	List entities (requirements, tests, defects… etc.) that are currently being reviewed. By default only requirements that have not been reviewed are displayed.

Figure 9-20 shows an example of the Edit Preferences page.

Figure 9-20. Example of the Edit Preferences page

9.6. Cross-Environment Query and Quality Center User Query Reports

HP Center Management for QC provides pre-configured reports that mirror the content of two of the most critical Dashboard portlets. Unlike the portlets that query and display information only when the user is viewing the Dashboard, reports can be scheduled to run in periodic intervals, and proactively shared or e-mailed to all interested parties.

The Cross-Environment Query and Quality Center User Query reports allow the user to generate an HTML or CSV output, which in turn can be used to produce custom multi-purpose reports or graphs in various formats.

The content of the AQM - Cross Environment Query Report mirrors the content of the Generic User Query (CM) portlet with similar preferences. It allows the user to query multiple database environments and aggregate results into a single table.

The content of the AQM - Quality Center User Query Report is equivalent to the content of the Quality Center User Query (CM) with similar preferences. It queries multiple Quality Center projects and aggregates results into a single table.

For details on using preferences, see the Generic User Query (CM) portlet and the Quality Center User Query (CM) portlet help.

To access these reports:

1. Log on to Mercury IT Governance Center.

For information on how to log on to Mercury IT Governance Center, see the *Getting Started* guide.

2. From the menu bar, select **Reports > Submit New Report.**

3. From the Report Category menu, select **Demand Management.**

The Submit Report: AQM - Cross Environment Query Report page appears, displaying the appropriate report parameter fields.

4. In all sections, complete the fields as required. Required fields are marked with a red asterisk. For more information on report configuration, refer to the Reports Guide and Reference.

Chapter 10
Training Center of Excellence Personnel

In This Chapter:

10.1. Creating Certification Courses
10.2. Making Training and Certification Requests
10.3. Publishing Knowledge Base Articles
10.4. Viewing and Tracking Training and Certification Activity

It is best practice for the Quality CoE to encourage its personnel to meet appropriate training and skill proficiency requirements before assigning individuals to critical projects. To that end, HP Center Management for QC includes pre-built request types with their own workflows to facilitate the following activities:

- Creation of certification courses
- Training and certification activities
- Publication of knowledge base articles

10.1. Creating Certification Courses

A course definition request is designed by a certification trainer or manager in order to create a new certification course offering. All courses must be approved by the certification manager before they are made available to the CoE and line of business personnel.

All course definitions contain 4 main sections:

- Prerequisites - List of prerequisites and training materials that the student should complete prior to performing the course tasks.
- Tasks - List of tasks and material that the student must review and complete in order to acquire knowledge and expertise targeted by the course.
- Environments - List of environments on which specific tasks should be performed. It is not important to perform all tasks in all environments, however it is important to gain experience in environments that may be relevant to the Center of Excellence's business.
- Examination - List of examination material that must be completed by the student in order to pass the course. The examination results should also reflect the level of proficiency of the student in specific skills.

The course definition request follows the workflow pictured in Figure 10-1 and described in Table 10-1.

Figure 10-1.Course definition request workflow

Table 10-1.Course definition request workflow details

	Workflow Steps	Details
1.	New	A new course definition request is created.
2.	In Draft	The trainer develops content for the training and certification course. The course should contain prerequisites, tasks, environments and exams. Once the course definition is completed, the courseware developer submits it for review. A notification email is sent to the courseware developer with status of the request.
3.	Submission (Passthru)	A pass-through step.
4.	In Review	The certification manager assigns the request to an appropriate CoE trainer or him/herself for reviewing the content of the courseware. The assigned reviewer is responsible for approving the content. A notification email is sent to CoE Certification Manager and Certification Trainers requesting for review of course definition.
5.	Set Actual Availability Field	Once the course definition is approved, the actual availability field is set to the requested availability.
6.	Live	The course definition has been completed.

		A notification email is sent to the requestor, CoE Certification Manager, and Trainers, advising them of the availability of the courseware.
7.	Cancelled	The request has been cancelled by the requestor. The ITG administrator should clear the ITG system from any cancelled requests after a defined period of time (such as 2 months).
8.	Require Administrator Action	An error occurred during step 5 while setting the actual availability of the courseware. The ITG administrator should take corrective action and retry the operation. A notification email is sent to the ITG administrators requesting for corrective action.

To create a course definition request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Certification Requests > Define Certification Course.**

The Create New Request page appears, displaying the appropriate course definition fields.

3. In the request sections, complete the fields as required. Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the course definition. For information concerning a specific field, click the [?] icon next to the field (where available).

4. In the Notes section, enter additional information. The Notes section contains fields where notes and information concerning the course definition can be entered and stored. Typically, when creating a course definition request, you do not need to add a note to it. However, add a note if you want to convey additional information to the reviewers and processors of the request.

5. In the Create New Request page, click **Submit.**

The Request Creation Confirmed page appears.
After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated course definition request's detail page.

6. Once the course definition request has been submitted, it is routed along its workflow.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

10.2. Making Training and Certification Requests

A training request allows the requestor (or student) to request training and certification on an available course offering as defined by certification course definitions. The request is assigned to a certification trainer who is responsible for mentoring the student and evaluating performance. Upon completion of the request, the trainer is responsible for updating the student's skill profile. The training request follows the workflow pictured in Figure 10-2 and described in Table 10-2.

Figure 10-2. Training request workflow

Table 10-2. Training request workflow details

	Workflow Steps	Details
1.	New	A new request for training and certification is created.
2.	Populate Course Content	Based on the course requested, the appropriate fields and content for the Prerequisites, Tasks, Environments, and Exams sections are populated.
3.	Require Administrator Action	An error occurred during step 2 while loading the content for the course. The ITG administrator should take corrective action and retry the operation. A notification email is sent to the ITG administrators requesting for corrective action.
4.	Assign Trainer	The training request is assigned to an appropriate trainer based on the course requested. A notification email is sent CoE Certification Manager and Trainers requesting assignment of the request.
5.	Trainer Assigned	A pass-through step.
6.	Close (Cancelled)	If the training request is rejected either due to availability of trainer or for other possible reasons, the request is closed.
7.	Study (Student)	The requestor or student reviews through the course prerequisites and performs the required tasks. The results of the prerequisite requirements and task requirements are uploaded into the request by the student for review by the trainer. A notification email is sent to the student and assigned trainer regarding the status of the training request.
8.	Review Prerequisites and Tasks	The trainer evaluates whether the prerequisites for the course were met, and the tasks completed. A notification email is sent to the student and assigned trainer regarding the status of the training request.
9.	Examination (Student)	If prerequisites and tasks were completed, the course exam is administered. The student must complete the required exams and submit the answers through the request. A notification email is sent to the student and assigned trainer regarding the status of the training request.
10.	Submit Exam	A pass-through step.
11.	Grade Exam	The trainer reviews the exams. If any exam was not completed satisfactorily, the exam may be returned to the student for completion. The trainer grades the exams, and rates the student's proficiency and performance. The CoE Trainer should update the student's resource profile with the appropriate skills and proficiency level.
12.	Closed (Success)	The training course has been completed.

To create a training and certification request:

1. Log on to Mercury IT Governance Center.

For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Certification Requests > Submit Training Request.**

The Create New Request page appears, displaying the appropriate training and certification fields.

3. In the request sections, complete the fields as required. Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the course definition. For information concerning a specific field, click the ? icon next to the field (where available).

4. In the Notes section, enter additional information. The Notes section contains fields where notes and information concerning the training and certification request can be entered and stored. Typically, when creating a training and certification request, you do not need to add a note to it. However, add a note if you want to convey additional information to the reviewers and processors of the request.

5. In the Create New Request page, click **Submit.**

The Request Creation Confirmed page appears.
After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated course definition request's detail page.

6. Once the training and certification request has been submitted, it is routed along its workflow.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

10.3. Publishing Knowledge Base Articles

HP Center Management for QC includes a pre-built knowledge base article request and workflow designed to process and contain information that helps the CoE to build its own knowledge center. These knowledge base articles are stored in the Mercury IT Governance Center, and can be searched by CoE and LOB users for important or useful information. The knowledge base article's content is protected by role using the Target Audience field, which defines the security group in Mercury IT Governance Center that is allowed to view the article.

The knowledge base article request follows the workflow pictured in Figure 10-3 and described in Table 10-3.

Figure 10-3. Knowledge base article request workflow

Table 10-3. Knowledge base article request workflow details

	Workflow Steps	Details
1.	New	A new draft of a knowledge base article is created.
2.	In Draft	The author of the article should finalize the content of the article, making any necessary revisions based on comments from reviewers, and submit it for review. The author may also choose to cancel the article if article content is obsolete or not needed for publication. A notification email is sent to the author and assigned reviewer (if available) regarding the status of the article.
3.	Passthru	A pass-through step.
4.	In Review	The CoE Certification Manager should assign a reviewer to the knowledge base article if one has not already been assigned. The reviewer either approves the content for publication or rejects it with necessary feedback to the author. A notification email is sent to the author and assigned reviewer regarding the status of the article.
5.	Live	The knowledge base article is live, and can be viewed by the defined targeted audience (security group).
6.	Cancelled	The article was cancelled by the author.

		A notification email is sent to the assigned reviewer and author.

To create a knowledge base article:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the *Getting Started* guide.

2. From the menu bar, select **Center Management > Miscellaneous Requests > Create KB Article.**

The Create New Request page appears, displaying the appropriate knowledge base article fields.

3. In the request sections, complete the fields as required. Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the course definition. For information concerning a specific field, click the ☒ icon next to the field (where available).

4. In the Notes section, enter additional information. The Notes section contains fields where notes and information concerning the knowledge base article can be entered and stored. Typically, when creating a knowledge base article, you do not need to add a note to it. However, add a note if you want to convey additional information to the reviewers and processors of the request.

5. In the Create New Request page, click **Submit.**

The Request Creation Confirmed page appears.
After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated course definition request's detail page.

6. Once the knowledge base article has been submitted, it is routed along its workflow.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

10.4. Viewing and Tracking Training and Certification Activity

HP Center Management for QC delivers pre-configured Dashboard content that gives you a comprehensive real-time view of current training activity and skillset coverage. Table 10-4 provides the list of pre-configured training activity portlets available through HP Center Management for QC.

Table 10-4. HP Center Management for QC training activity dashboard portlets

Portlet Name	Description
CoE - Certification - Open Requests	List of training, certification and knowledge base requests pending for processing.
CoE - Certification - My Requests	List of all active certification and knowledge base requests either created by or assigned to current user.
CoE - Certification - Skillset Coverage (Chart)	Breakdown of skills and proficiencies covered by the CoE group.
CoE - Certification - Available Courses	List of available training and certification courses.
CoE - Certification - Active Training	List of active training requests in session.
CoE - Certification - Recent Publications	List of recently published knowledge base articles.
CoE - Certification - Skillset Coverage (Table)	List of skills and proficiencies covered by the CoE group.

COE - Certification - Open Requests Portlet

The COE - Certification - Open Requests portlet displays unassigned or pending requests relating to training or knowledge base. These requests must be assigned by the certification or training manager or trainer to the appropriate personnel. Figure 10-4 shows the COE - Certification - Open Requests portlet.

Figure 10-4. COE - Certification - Open Requests portlet

CoE - Certification - My Requests Portlet

The CoE - Certification - My Requests portlet displays a list of all active certification and knowledge base requests either created by or assigned to current user. Figure 10-5 shows the COE - Certification - Open Requests portlet.

Figure 10-5. COE - Certification - Open Requests portlet

CoE - Certification - Skillset Coverage Portlet

The CoE - Certification - Skillset Coverage portlet comes in the following forms:

- **Chart.** The CoE - Certification - Skillset Coverage (Chart) portlet displays a stacked bar chart of the current skillset makeup of the Center of Excellence delivery team. For each skill, the number of people at each proficiency level is displayed. Figure 10-6 shows the CoE - Certification - Skillset Coverage (Chart) portlet.

Figure 10-6. CoE - Certification - Skillset Coverage (Chart) portlet

117

- Table. The CoE - Certification - Skillset Coverage (Table) portlet displays a list of skillsets for the Center of Excellence delivery team. For each skill, the number of people at each proficiency level is displayed. Figure 10-7 shows the CoE - Certification - Skillset Coverage (Table) portlet.

Skill Name △	Novice	Experienced	Advanced	Expert	Wizard
Application Diagnostics	0	2	0	0	0
Business Process Testing	1	5	3	0	0
Change Impact Testing	0	2	1	0	0
IT Governance	0	1	0	0	0
Performance Center	0	0	1	0	0
Project Management	0	3	4	2	0
QC Administration	0	0	0	1	0
Quality Center	0	9	5	1	0
QuickTest Professional	1	3	1	1	0
Risk Management	0	1	2	1	0

Showing **1** to **10** of **10**   Prev   Next   Maximize

Figure 10-7. CoE - Certification - Skillset Coverage (Table) portlet

CoE - Certification - Available Courses Portlet

The CoE - Certification - Available Courses portlet lists all of the certification course definitions that have the status **Live** and displays the status of each in real time. Figure 10-8 shows the CoE - Certification - Available Courses portlet.

Preferences:

Course No. # △	Level	Course Name	Created By	Created On	Last Updated
31424	●	Quality Methodology - Basics	Kim Reddick	9/20/06	9/20/06
31425	◆	Quality Methodology - Advanced	Kim Reddick	9/20/06	9/20/06
31426	■	Testing Services Oriented Architecture (SOA)	Kim Reddick	9/20/06	9/20/06
31427	■	Agile Test Development	Kim Reddick	9/20/06	9/20/06
31428	●	Business Process Testing	Kim Reddick	9/20/06	9/20/06

Showing **1** to **5** of **5**   Prev   Next   Maximize

Figure 10-8. CoE - Certification - Available Courses portlet

CoE - Certification - Active Training Portlet

The CoE - Certification - Active Training portlet lists all of the training and certification requests that do not have the status **Closed** and displays the status of each in real time. Figure 10-9 shows the CoE - Certification – Active Training portlet.

Preferences:

Req # △	Course Name	Student	Trainer	Created On	Workflow Status
31438	Quality Methodology - Basics	Michael Brown		9/20/06	In Progress
31439	Risk Management	Kelly White		9/20/06	In Progress

Showing **1** to **2** of **2**   Prev   Next   Maximize

Figure 10-9. CoE - Certification – Active Training portlet

CoE - Certification - Recent Publications Portlet

The CoE - Certification - Recent Publications portlet lists recently published knowledge base articles. These articles are valuable for researching common issues and provide insight into

concepts and principles of the Quality Center of Excellence. Figure 10-10 shows the CoE - Certification - Recent Publications portlet.

KB # △	Description	Workflow Status	Last Updated
31421	Managing risk in agile development environment	Live	Kim Reddick
31422	Designing test plan and data for maximizing coverage while reducing test effort	Live	Kim Reddick
31423	Using dashboard portlets for improving end-to-end visibility or project and quality processes	Live	Kim Reddick
31430	A bug's... err tester's life	Live	Kim Reddick
31431	Developing a test strategy for automation	Live	Kim Reddick

Figure 10-10. CoE - Certification - Recent Publications portlet

Chapter 11
Managing Quality CoE Administrative Activity

In This Chapter:

11.1. Filing QC Instance Registration Requests
11.2. Filing QC Administrative Requests
11.3. Filing IT Service Requests
11.4. Filing Support Requests
11.5 Viewing and Tracking CoE Administrative Activity

The Quality Center of Excellence has a set of internal administrative activities that should follow a defined series of steps to ensure proper resolution. HP Center Management for QC includes request types and workflows for these activities, including:

- QC instance registration
- QC project and user administration
- Requesting service from IT
- Handling support requests

11.1. Filing QC Instance Registration Requests

A QC Instance Registration request is a call for registering Quality Center instances. Once registered, these instances can be referenced by other requests ((e.g. QC Administration Request, ALM Project Request, AQM Testing Request, etc.), and portlets to perform a number of queries and operations. The QC Instance Registration requests are routed to the CoE's administrative or operations teams and are handled by either an application administrator for Quality Center or a systems administrator. The QC Instance Registration request follows the workflow pictured in Figure 11-1 and described in Table 11-1.

Figure 11-1. **QC instance registration request workflow**

Table 11-1. **QC instance registration request workflow details**

	Workflow Steps	**Details**
1.	New	A new Quality Center registration request is submitted for processing.
2.	Verify Connectivity	The information provided for the Quality Center instance is tested and verified. If both the application server and database details are valid, the check passes.
3.	QC Instance Active	The registered instance has been validated and is available to be referenced and used in various requests that require QC instance information.
4.	Set QC Instance Inactive	Sets the active state of the Quality Center instance to unavailable. The instance can not be referenced in new requests.
5.	QC Instance Suspended	The instance has been temporarily suspended and may not be used in new requests. This is generally done when maintenance is being performed on the registered Quality Center instance.
6.	Check Dependency	Checks if the current QC Instance is currently being used by an existing project or request. Update is disallowed on QC instances that are currently or actively being used.
7.	Retry Dependency Check	The administrator can either retry the dependency check in order to perform an update, cancel the update request and return to active state with existing configuration, or suspend the Quality Center instance.
8.	Set QC Instance	The administrator should update the configuration of the instance. In case an error occurred, the administrator should check the status message, correct the problem, and re-submit so that the instance

		information can be validated.

To submit a QC Instance Registration request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Administrative Requests > Register a QC Instance.**

The Create New AQM - QC Instance Registration page appears, displaying the appropriate QC instance registration fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the ? icon next to the field (where available).

4. In the Notes section, enter additional information.

5. In the Create New AQM - QC Instance Registration page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

11.2. Filing QC Administrative Requests

A QC Administration request is a request for service on a specified quality center instance or project. This request may be used to automate project and user administration tasks. Supported administrative tasks include:

- Create a new project based on a template
- Copy an existing project
- Synchronize project configuration and customization with another project or template
- Create a new user account
- Update a user account
- Reset password of a user account
- Add/remove user from a QC project of group

These requests are routed to CoE's administrative or operations teams and are handled by either an application administrator for QC or a systems administrator. Unlike support requests, these requests are specific to QC administration, and automate a pre-defined list of administrative tasks. The QC Administration request follows the workflow pictured in Figure 11-2 and described in Table 11-2.

Figure 11-2. QC administrative request workflow

Table 11-2. QC administrative request workflow details

	Workflow Steps	**Description**
1.	New	A new QC administrative request has been submitted for processing.
2.	Check Auto Assignment Of Resource	Check if the request should be automatically assigned or routed to a particular administrator. Auto-assignment may be set up by defining AQM_ADMIN_REQUEST_AUTO_ASSIGN variable inside AQM_CONFIGURATION_SETTINGS validation. If a value is not defined, the CoE IT support team will have to manually assign a resource to handle this request.
3.	Assign Resource	If a resource has not been defined for the request, the CoE IT service team will need to assign a resource manually to handle this request.
4.	Process Admin Request	The assigned administrator verifies the information provided in the request. If the request operation is permitted based on CoE's policies, the administrator may elect to either perform the task manually or automate this task. Task automation allows administrators to quickly process frequently requested operations.
5.	Escalate Request	The issuer of the request may escalate the request, increasing its priority and notifying CoE's administration that the request requires attention.
6.	Check & Update Priority	If the request is escalated, this step will check and increase the priority of the request.
7.	Escalated	The request has been escalated and appropriate action must be taken to expedite its resolution. The administrative manager may assign additional resources to help resolve the issue.
8.	Cancelled	The request was cancelled by the requestor.
9.	Additional Information Requested	Additional information has been requested from the issuer/creator of the request before the request can be processed correctly. This step is also used to get necessary feedback or clarification on the task.
10.	Automated Processing	This step automates the tasks defined in the administrative request. It is important to ensure that all required information is provided in the appropriate section for the task.
11.	Manual Processing	The administrator assigned to the task has elected to perform the requested task manually. This may be required depending on the complexity of the request.
12.	Reset Error Field	Clears task status field.
13.	Validate Results	This step allows the assigned administrator to validate task preformed, especially if it was automated. The administrator can also take manual action to complete or audit the task.
14.	Passthru	A pass-through step.
15.	Resolution Approval & Feedback	A resolution has been submitted and is pending requestor's approval and feedback. The requestor can complete the feedback section to provide service level metrics. If the feedback is not provided within configured timeout interval (usually 14 days), the request is automatically closed.
16.	Close (Success)	The request has been completed.

To submit a QC administrative request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Administrative Requests > QC Administration.**

The Create New AQM - QC Administrative Request page appears, displaying the appropriate QC project and user administration request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the [?] icon next to the field (where available).

4. In the Notes section, enter additional information.

5. In the Create New AQM - QC Administrative Request page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

11.3. Filing IT Service Requests

The IT service request supplied by HP Center Management for QC is a request for general administrative or IT support. These requests are routed to the CoE's administrative or operations teams and are handled by either an application administrator for QC, ITG administrator or

systems administrator. Unlike support requests, these requests are focused more on items such as:
- Application software
- Hardware configuration
- Upgrades
- Installations

The IT service request follows the workflow pictured in Figure 11-3 and described in Table 11-3.

Figure 11-3. IT service request workflow

Table 11-3. IT service request workflow details

	Workflow Steps	Details
1.	New	A new IT service request is created.

2.	Assign Request	The request is assigned to appropriate personnel for handling the request. The request is usually assigned to an appropriate administrator based on the category of the request, who coordinates the tasks with other appropriate administrators. A notification email is sent to CoE administrators requesting assignment of the request.
3.	Work In Progress (Engineer)	The assigned engineer performs the required tasks to process and address the needs of the request.
4.	Work In Progress (Requestor)	The requestor is provided the opportunity to track the request and escalate if necessary.
5.	Information Requested	Additional information is requested from the owner of the request. A notification email is sent to the requestor asking for additional information.
6.	Escalated	The request has been escalated. It should be either reassigned or its priority raised, and appropriate action must be taken to expedite resolution for the request. Action should be taken by the administrative team, or project and technical account manager. A notification email is sent to CoE administrators requesting handling of request escalation.
7.	Resolution Approval & Feedback	A resolution has been submitted, and is pending the requestor's approval and feedback. The requestor can complete the feedback section to provide service level metrics back to CoE management. If feedback is not provided within configured timeout interval (usually 7 days), the request is automatically closed. A notification email is sent to the requestor with status of request.
8.	Close (Success)	The request has been completed.
9.	Cancelled	The request was cancelled by the requestor, or the requestor was unresponsive to the demand for more information in order to properly process the request.

To submit an IT Service request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Administrative Requests > IT Service Request.**

The Create New COE - IT Service Request page appears, displaying the appropriate IT Service request fields.

Create New COE - IT Service Request

Expand All | Collapse All | Submit | Cancel

- Header
- Instructions [?]
  - Use this form to submit any IT related problems to the Administrative Center.
  - The fields with * require your input.
  - Please provide as much information as possible for a speedy resolution.
  - If the contact info shown below is incorrect please provide correct contact info in notes section below so that the user profile can be updated.
- General Information [?]

Request Status: New

Created By: Admin User   Priority: [▼]

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the ⍰ icon next to the field (where available).

4. In the Notes section, enter additional information.

5. In the Create New COE - IT Service Request page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

11.4. Filing Support Requests

Support requests may be issued by any user for application support on HP Quality Center, or IT Governance Center. These requests are generally around application usability and support, and are handled by the CoE's support engineers. Feedback provided by the requestor upon completion of the support request is channeled to the CoE manager in order to ensure that support services are being handled effectively. Support requests follow the workflow pictured in Figure 11-4 and described in Table 11-4.

Figure 11-4. Support request workflow

Table 11-4. Support request workflow details

	Workflow Steps	Description
1.	New	A new application support request is created.
2.	Assign Request	The request is assigned to the appropriate personnel. The request is usually assigned to a support tier 1 engineer. A notification email is sent to support tier 1 engineers indicating that a new support request is open and needs to be assigned and handled.
3.	Work In Progress (Engineer)	The assigned engineer performs the required tasks to process and address the needs of the request.
4.	Work In	The requestor is provided the opportunity to track the request and

	Progress (Requestor)	escalate if necessary.
5.	Information Requested	Additional information is requested from the owner of the request. A notification email is sent to the requestor asking for additional information.
6.	Escalated	The request has been escalated. It should be either reassigned or its priority raised, and appropriate action must be taken to expedite resolution for the request. Action should be taken by support tier 2 or the assigned engineering resource. A notification email is sent to support tier 2 and assigned engineer for handling of request escalation.
7.	Resolution Approval & Feedback	A resolution has been submitted, and is pending the requestor's approval and feedback. The requestor can complete the feedback section to provide service level metrics back to CoE management. If feedback is not provided within configured timeout interval (usually 7 days), the request is automatically closed. A notification email is sent to the requestor with the status of request.
8.	Close (Success)	The request has been completed.
9.	Cancelled	The request was cancelled by the requestor, or the requestor was unresponsive to the demand for more information in order to properly process the request.

An LOB user can submit a support request at any time.

To submit a support request:

1. Log on to Mercury IT Governance Center.
For information on how to log on to Mercury IT Governance Center, see the Getting Started guide.

2. From the menu bar, select **Center Management > Service Requests > Support Request.**

The Create New COE - Support Request page appears, displaying the appropriate support request fields.

3. In all sections, complete the fields as required. Required fields are marked with a red asterisk. All other fields are optional, but additional information helps all stakeholders gain better understanding and visibility into the project. For information concerning a specific field, click the [?] icon next to the field (where available).

4. In the Notes section, enter additional information.

5. In the Create New COE - Support Request page, click Submit.
The Request Creation Confirmed page appears.

Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated project initiation request's detail page.

6. Once the project initiation request has been submitted, it is routed along its workflow.

11.5. Viewing and Tracking CoE Administrative Activity

HP Center Management for QC delivers pre-configured Dashboard content that gives you a comprehensive real-time view of current administrative activity. Table 11-5 provides the list of pre-configured administrative activity portlets available through HP Center Management for QC.

Note: Depending on your role, you may find different portlets and Dashboard pages available to you. For detailed instructions on distributing Dashboard modules, see Table 4-6 - Dashboard Page and Portlet Content by Role in this guide and the "Distributing Modules" chapter in the Configuring the Standard Interface guide.

Table 11-5. HP Center Management for QC administrative activity dashboard portlets

Portlet Name	Description
CoE - IT Service - Open Administrative Requests	List of all administrative requests that are currently open or escalated.
CoE - IT Service - My Administrative Requests	List of all administrative requests either created by or assigned to current user.
CoE - IT Service - Open IT Service Requests	List of all IT service Requests that are currently open or escalated.
CoE - IT Service - My IT Service Requests	List of all IT service requests that are either created by or assigned to the current user.
CoE - IT Service - Top Issues by Category	Breakdown of top IT service requests based on category and sub-category.
CoE - IT Service - Issue Priority	Breakdown of IT Services requests based on priority.
CoE - IT Service - Issue Status	Breakdown of IT Service Requests based on status.
CoE - IT Service - Issue Trending	Trending of IT service requests over time.
CoE - IT Service - Issue Trending (Cluster)	Trending of IT service requests over time, displayed in monthly status cluster format
CoE - IT Service - Trending By Administrative Type	Trending of all administrative requests over time.
CoE - IT Service - Trending By Administrative Type (Cluster)	Trending of all administrative requests over time, displayed using monthly status clusters.
CoE - IT Service - Customer Satisfaction	Trending of customer satisfaction for administrative requests.
CoE - Support - Open Requests	List of all product support requests that are currently open or escalated.

CoE - Support - My Service Requests	List of all active support requests that are either created by or assigned to the current user.
CoE - Support - Top Issues by Category	Breakdown of top support requests based on category and sub-category.
CoE - Support - Issue Priority	Breakdown of support requests based on priority.
CoE - Support - Issue Status	Breakdown of support requests based on status.
CoE - Support - Issue Trending	Trending of support requests over time.
CoE - Support - Issue Trending (Cluster)	Trending of application support issues on monthly basis
CoE - Support - Customer Satisfaction	Trending of customer satisfaction for support requests.

CoE - IT Service - Open Administrative Requests Portlet

The CoE - IT Service - Open Administrative Requests portlet displays all administrative requests that are either new and need to be assigned or have been escalated. The service manager or coordinator should take immediate action to assign these requests to appropriate and qualified administrator or engineer. Figure 11-6 shows the CoE - IT Service - Open Administrative Requests portlet.

Figure 11-6. CoE - IT Service - Open Administrative Requests portlet

CoE - IT Service - My Administrative Requests Portlet

The CoE - IT Service - My Administrative Requests portlet displays all administrative requests that are either issued by or assigned to the current user. Figure 11-7 shows the CoE - IT Service - My Administrative Requests portlet.

Figure 11-7. CoE - IT Service - My Administrative Requests portlet

CoE - IT Service - Open IT Service Requests Portlet

The CoE - IT Service - Open IT Service Requests portlet displays all IT service requests that are either new and need to be assigned or have been escalated. The service manager or coordinator

should take immediate action to assign these requests to appropriate and qualified administrator or engineer. Figure 11-8 shows the CoE - IT Service - Open IT Service Requests portlet.

Figure 11-8. CoE - IT Service - Open IT Service Requests portlet

CoE - IT Service - My IT Service Requests Portlet

The CoE - IT Service - My IT Service Requests portlet displays all IT Service Requests that are either created by or assigned to the current user. Figure 11-9 shows the CoE - IT Service - My IT Service Requests portlet.

Figure 11-9. CoE - IT Service - My IT Service Requests portlet

CoE - IT Service - Top Issues by Category Portlet

The CoE - IT Service - Top Issues by Category portlet displays the number and percentage of the top IT service requests based on category and subcategory. This information should be used to determine the type of issues the IT service team is handling, and take necessary action to address growing demand. Figure 11-10 shows the CoE - IT Service - Top Issues by Category portlet.

Figure 11-10. CoE - IT Service - Top Issues by Category portlet

CoE - IT Service - Issue Priority Portlet

134

The CoE - IT Service - Issue Priority portlet displays a pie chart showing the distribution of IT service requests based on priority. Figure 11-11 shows the CoE - IT Service - Issue Priority portlet.

Figure 11-11.CoE - IT Service - Issue Priority portlet

CoE - IT Service - Issue Status Portlet

The CoE - IT Service - Issue Status portlet displays a pie chart showing the distribution of IT service requests based on current status (e.g. open, escalated, closed, etc.). Figure 11-12 shows the CoE - IT Service - Issue Status portlet.

Figure 11-12. CoE - IT Service - Issue Status portlet

CoE - IT Service - Issue Trending Portlet

The CoE - IT Service - Issue Trending portlet displays IT service requests trending based on status: New, Open and Closed. The metrics are displayed on a monthly basis. This graph may be

used to see the status of issues that where opened during any month. Figure 11-13 shows the
CoE - IT Service - Issue Trending portlet.

Figure 11-13. CoE - IT Service - Issue Trending portlet

CoE - IT Service - Issue Trending (Cluster) Portlet

The CoE - IT Service - Issue Trending (Cluster) portlet displays IT service requests trending
based on status: New, Open, and Closed. The metrics are displayed on a monthly basis. This
graph may be used to see the status of issues that where opened during any month. Figure 11-14
shows the CoE - IT Service - Issue Trending (Cluster) portlet.

Figure 11-14. CoE - IT Service - Issue Trending (Cluster) portlet
CoE - IT Service - Trending By Administrative Type Portlet

The CoE - IT Service - Trending By Administrative Type portlet displays trending of all CoE administrative requests based on status: New, Open, and Closed. The metrics are displayed on a monthly basis. This graph may be used to see the status of issues that where opened during a particular month. Figure 11-15 shows the CoE - IT Service - Trending By Administrative Type portlet.

Figure 11-15. CoE - IT Service - Trending By Administrative Type portlet

CoE - IT Service - Trending By Administrative Type (Cluster) Portlet

The CoE - IT Service - Trending By Administrative Type (Cluster) portlet displays trending of all CoE administrative requests based on status: New, Open, and Closed. The metrics are displayed on a monthly basis. This graph may be used to see the status of issues that where opened during a particular month. Figure 11-16 shows the CoE - IT Service - Trending By Administrative Type (Cluster) portlet.

Figure 11-16. CoE - IT Service - Trending By Administrative Type (Cluster) portlet

CoE - IT Service - Customer Satisfaction Portlet

The CoE - IT Service - Customer Satisfaction portlet displays average customer satisfaction survey results across all administrative and IT service requests as a measurement of satisfaction on a scale of 1 to 5.

- 5 - Very satisfied

- 4 - Satisfied

- 3 - Neutral

- 2 - Dissatisfied

- 1 - Very dissatisfied

The results are based on the survey questions that are asked in the Feedback section of the IT Service Request and are used by the CoE management team to ensure high quality and timely request resolution.

Survey Questions:
- How satisfied were you with the knowledgeableness of the person handling the request?
- How satisfied were you with the timeliness in which your issue was handled?
- How satisfied were you with the outcome of the request?
- How would you rate your overall experience?

Figure 11-17 shows the CoE - IT Service - Customer Satisfaction portlet.

Figure 11-17. CoE - IT Service - Customer Satisfaction portlet

CoE - Support - Open Requests Portlet

The CoE - Support - Open Requests portlet displays all support requests that are either new and need to be assigned or have been escalated. The service manager or coordinator should take immediate action to assign these requests to the appropriate and qualified support engineer. Figure 11-18 shows the CoE - Support - Open Requests portlet.

Figure 11-18. CoE - Support - Open Requests portlet

CoE - Customer - My Requests Portlet

The CoE - Customer - My Requests portlet displays pending support requests that were either issued by or assigned to the current user. Figure 11-19 shows the CoE - Customer - My Requests portlet.

Figure 11-19. CoE - Customer - My Requests portlet

CoE - Support - Top Issues by Category Portlet

The CoE - Support - Top Issues by Category portlet displays the number and percentage of the top support requests based on category and subcategory. This information should be used to determine the type of issues the support service team is handling, and take necessary action to address growing demand. Figure 11-20 shows the CoE - Support - Top Issues by Category portlet.

Figure 11-20. CoE - Support - Top Issues by Category portlet

CoE - Support - Issue Priority Portlet

The CoE - Support - Issue Priority portlet displays a pie chart showing the distribution of support issues based on priority. Figure 11-21 shows the CoE - Support - Issue Priority portlet.

Figure 11-21. CoE - Support - Issue Priority portlet

CoE - Support - Issue Status Portlet

The CoE - Support - Issue Status portlet displays a pie chart showing the distribution of support issues based on current status: Open, Escalated, Closed, etc. Figure 11-22 shows the CoE - Support - Issue Status portlet.

Figure 11-22. CoE - Support - Issue Status portlet

CoE - Support - Issue Trending Portlet

The CoE - Support - Issue Trending portlet displays trending of all support requests based on status: New, Open, and Closed. The metrics are displayed on a monthly basis. This graph may be used to see the status of issues that where opened on a particular month. Figure 11-23 shows the CoE - Support - Issue Trending portlet.

Figure 11-23. CoE - Support - Issue Trending portlet

CoE - Support - Issue Trending (Cluster) Portlet

The CoE - Support - Issue Trending (Cluster) portlet displays trending of all support requests based on status: New, Open, and Closed. The metrics are displayed on a monthly basis. This graph may be used to see the status of issues that where opened on a particular month. Figure 11-24 shows the CoE - Support - Issue Trending (Cluster) portlet.

Figure 11-24. CoE - Support - Issue Trending (Cluster) portlet

CoE - Support - Customer Satisfaction Portlet

The CoE - Support - Customer Satisfaction portlet displays average customer satisfaction survey results across all administrative and IT service requests as a measurement of satisfaction on a scale of 1 to 5.

☐ 5 - Very satisfied

141

☐ 4 - Satisfied

▦ 3 - Neutral

🔲 2 - Dissatisfied

🟥 1 - Very dissatisfied

The results are based on the survey questions that are asked in the Feedback section of the IT Service Request and are used by the CoE management team to ensure high quality and timely request resolution.

Survey Questions:
- How satisfied were you with the knowledgeableness of the person handling the request?
- How satisfied were you with the timeliness in which your issue was handled?
- How satisfied were you with the outcome of the request?
- How would you rate your overall experience?

Figure 11-25 shows the CoE - Support - Customer Satisfaction portlet.

Figure 11-25. CoE - Support - Customer Satisfaction portlet