Mercury IT Governance Center™

Mercury Program Management™

User's Guide

Version: 6.0

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1

Introduction

In This Chapter:

About This Document

Mercury Program Management™ is a Mercury IT Governance Center™ product that provides organizations with a single location from which program managers can initiate, operate, and manage their portfolio of programs and projects.

Organizations implement Mercury Program Management in order to:

- Ensure alignment of IT projects with business objectives
- Eliminate duplicate and non-priority efforts
- Improve operational efficiency
- Leverage resources
- Ensure on-time and on-budget delivery

To ensure these business requirements are met, Mercury Program Management provides a full project lifecycle solution. Starting with new project or program requests, Mercury Program Management enforces systematic capturing of all relevant functional specifications and priorities. Appropriate business user approvals based on project scope, budget level, and other business rules are built in. Once approved, the program provides a single point for visibility and control over relevant projects and requests.

This document contains the following chapters:

- Chapter 1, *Introduction,* on page 11

  This chapter provides an overview of this guide and of Mercury Program Management.

- Chapter 2, *Configuring Business Objectives,* on page 17

  Business objectives are a set of business goals that can be prioritized and tied to programs. This chapter details how to configure business objectives.

- Chapter 3, *Creating Programs,* on page 21

  A program is a collection of projects and associated scope changes, risks, issues, and resource requests. This chapter details how to create a new program.

- Chapter 4, *Managing Programs,* on page 45

  During a program's life cycle, many events can occur that make it necessary to assess the effects on a program, and to make changes if necessary. This chapter details how to manage your programs.

- Chapter 5, *Updating Programs,* on page 71

  This chapter describes how to update a program's priorities, general information, summary conditions, and accessibility.

- Chapter 6, *Submitting Requests that Affect Programs,* on page 83

  Program-related concerns are dealt with using requests. This chapter details how to submit program-related requests.

- Appendix A: *Program Management Portlets* on page 91

  This appendix lists the Program Management portlets.

- Appendix B: *Reports by Category* on page 95

  This appendix lists the Program Management reports.

Who Should Read This Document

This document is intended for the following audience type:

- End users, especially Program Managers involved with the creation of business objectives and the creation, management, and updating of programs

For More Information

For information about audience types, see the *Guide to Documentation*.

Prerequisite Documents

Prerequisite documents for this guide are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*

For More Information

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

Related Documents

Related documents for this guide are:

- *Mercury Demand Management User's Guide*
- *Mercury Change Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury Program Management Configuration Guide*
- Project Management Institute: *A Guide to the Project Management Body of Knowledge* (PMBOK Guide)

Note

Many of the Mercury Program Management program controls are modeled after *A Guide to the Project Management Body of Knowledge*. These program controls include issues, risks, and scope changes.

For More Information

For information about Mercury IT Governance Center documents and how to access them, see the *Guide to Documentation*.

Overview of Program Management

Mercury Program Management allows a program manager to deliver a new business capability or solve a problem using programs. Using programs, a program manager can do the following:

- Oversee related IT projects
- Coordinate inter-project deliverable and milestones
- Manage scope change
- Identify and mitigate risks
- Resolve inter-project issues
- Manage the allocation of resources
- Initiate program requests (by stakeholders)

Chapter

2

Configuring Business Objectives

In This Chapter:

Overview of Business Objectives

Business objectives are a set of business goals that can be prioritized and tied to programs. Business objectives can be created, modified, and deleted independently of programs.

For example, Company A creates the business objective, "Reduce order to delivery time." This business objective is assigned a priority and associated with the program created to upgrade Company A's Customer Service system.

Creating Business Objectives

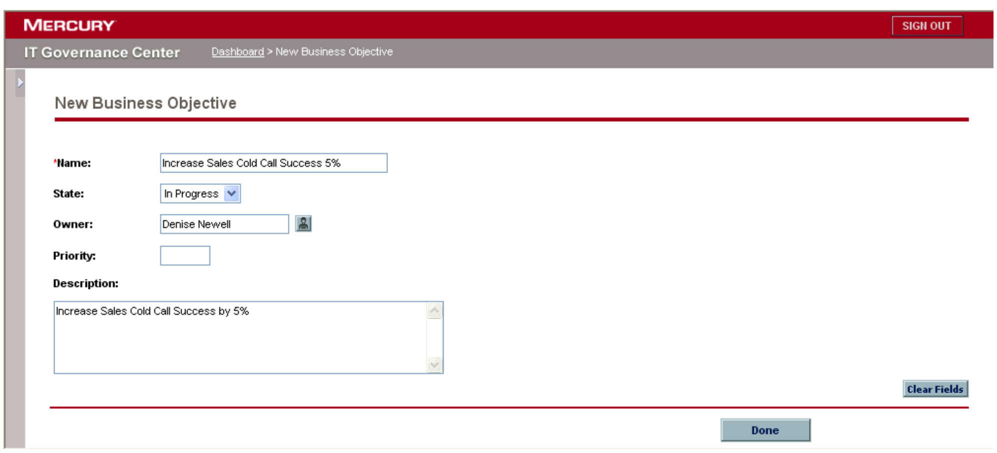
To create business objectives:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **PMO > Business Objectives > Create a Business Objective.**

   You can also select **Create > Business Objective.** The New Business Objective page appears.



3. In the New Business Object page, complete all of the required fields and any optional fields.

4. At the bottom of the New Business Object page, click **Done.**

   The business objective is created.

Editing Business Objectives

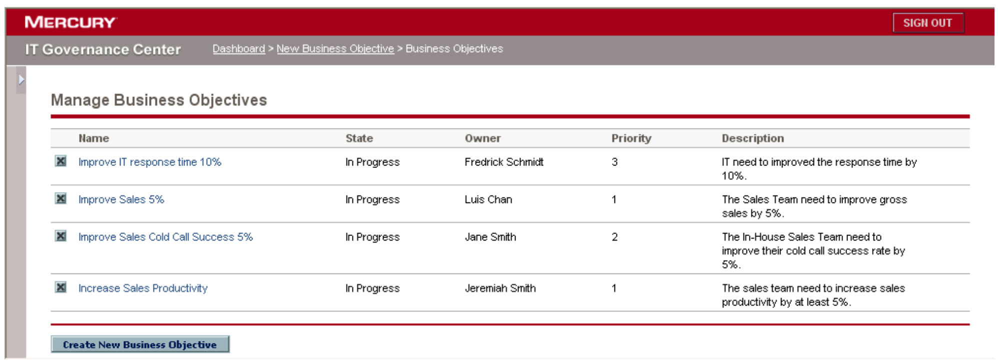
To edit business objectives:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

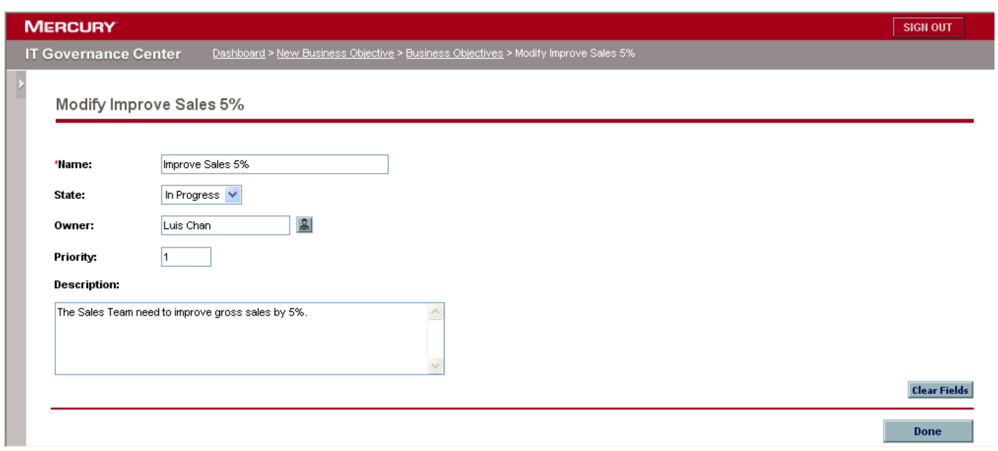
2. From the menu bar, select **PMO > Business Objectives > Manage Business Objectives.**

   The Business Objectives page appears.



3. On the Business Objectives page, select the business objective.

   The Modify Business Objective page appears.



4. On the Modify Business Objective page, modify any of the fields and click **Done.**

   The changes to the business objective are saved.

Deleting Business Objectives

Business objectives that are linked to programs cannot be deleted.

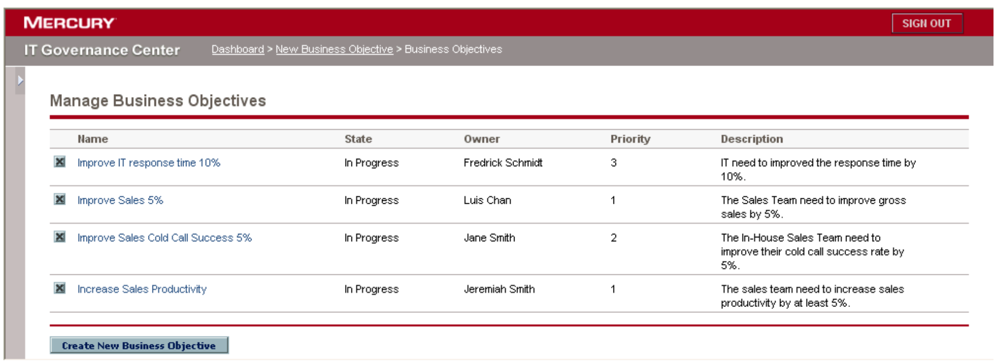
To delete business objectives:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **PMO > Business Objectives > Manage Business Objectives.**

   The Business Objectives page appears.



3. On the Business Objectives page, click the **Delete** icon next to the business objective.

   A dialog window appears asking you to confirm whether you want to delete the business objective.

4. In the dialog window, click **OK.**

   The business objective is deleted.

Chapter

3

Creating Programs

In This Chapter:

Overview of Creating Programs

A program is a collection of projects and associated scope changes, risks, issues, and resource requests. Programs feature full drilldown into projects and requests, as well as roll-up of relevant data from projects and attached requests. Much like projects, programs have associated summary conditions and configurable exception indicators.

For example, a program is created to oversee the upgrade of Company A's Customer Service computer system for better integration with the Sales force. Projects are created by the Customer Service, Sales, and IT managers. Each resource handles their own aspect of the work, and are linked and monitored by the program. At the same time, risks and scope changes submitted against the program are tracked and followed up on.

To create a program requires the following steps (see *Figure 3-1*):

- **Submit a request for a new program.** Programs start as a request for a new program. Once the request for a program is approved, you can use the Enter Program Information page to create a program.
- **Create the program.** Use the Enter Program Information page to create a program. Creating a program requires the following steps:
  - On the Enter Program Information page, enter program information. Enter general information concerning the program. If applicable, add a budget and business objectives to the program.
  - Add projects and references to the program. Add one or more projects and references to a program. A standard set of references includes:
    - Attachments
    - Packages
    - Projects
    - Tasks
    - Requests
    - URLs

- **Configure the program's summary condition indicators.** Summary condition indicators are a useful way to show the at-a-glance status of a program's issues, scope changes, risks, and resource requests, as well as cost data if cost management has been enabled for the program. Use the Enter Program Information page to configure summary condition indicators for a program.

- **Configure the program's access.** You can control which users can view the program, as well as the users who can view the program's cost information independently. Use the Enter Program Information page to configure the program's access.

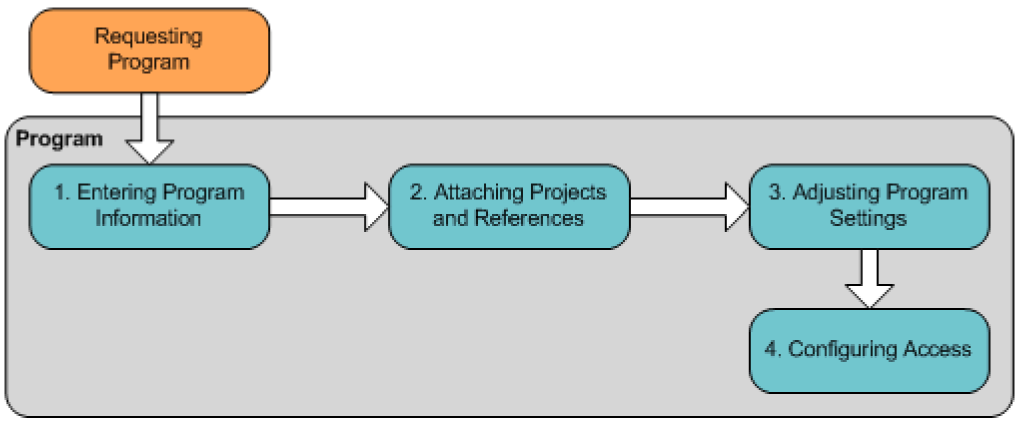


Figure 3-1. Process for creating a program

Requesting Programs

Typical business practice indicates that requesting a program is a valid and necessary first step to take before actually creating one. This allows you to capture useful information, gather the necessary approvals, and notify the proper individuals before getting the program started.

In order to take full advantage of Mercury Program Management's capabilities, it is recommended you use the pre-configured Program request type and associated workflow to request a program. If necessary, the Mercury IT Governance Center application administrator can modify the Program request type and workflow to suit your business needs.

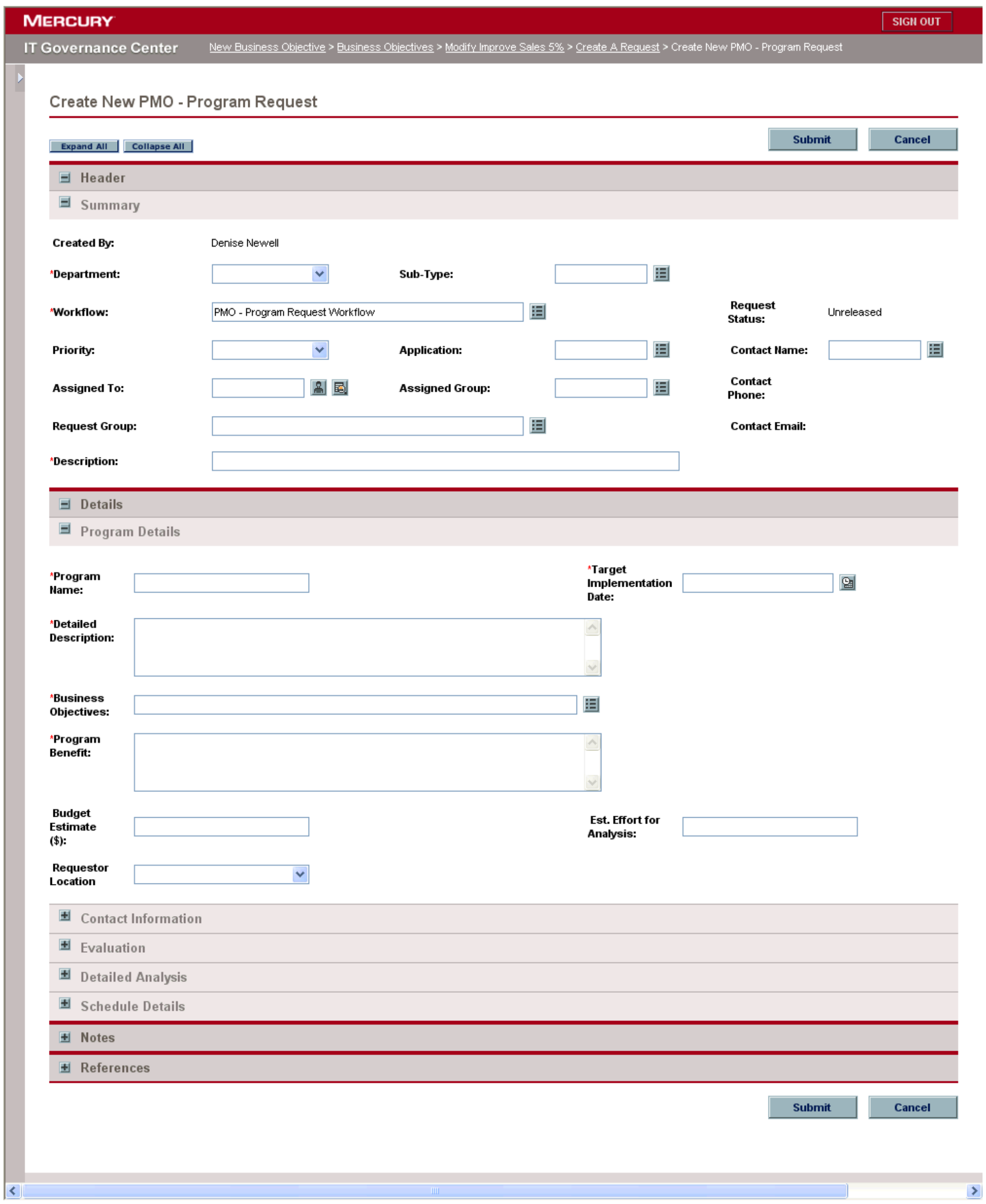
To request a new program:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **Create > Initiative Request.**

   The Request Creation page appears with the Program request type loaded.



3. In the Create New PMO - Program Request page, complete all of the required fields and any optional fields.

4. In the Create New PMO - Program Request page, click **Submit.**

   The request for a new program is submitted.

Creating Programs

After the request for a program has been approved, the program itself can be created. This process involves entering program-specific information along with associating business objectives, projects, and references, as well as configuring program summary condition indicators.

Step One: Entering Program Information

After the request for a program has been approved, the program itself can be created. This process involves entering program-specific information along with associating business objectives, projects, and references, as well as configuring program summary condition indicators.

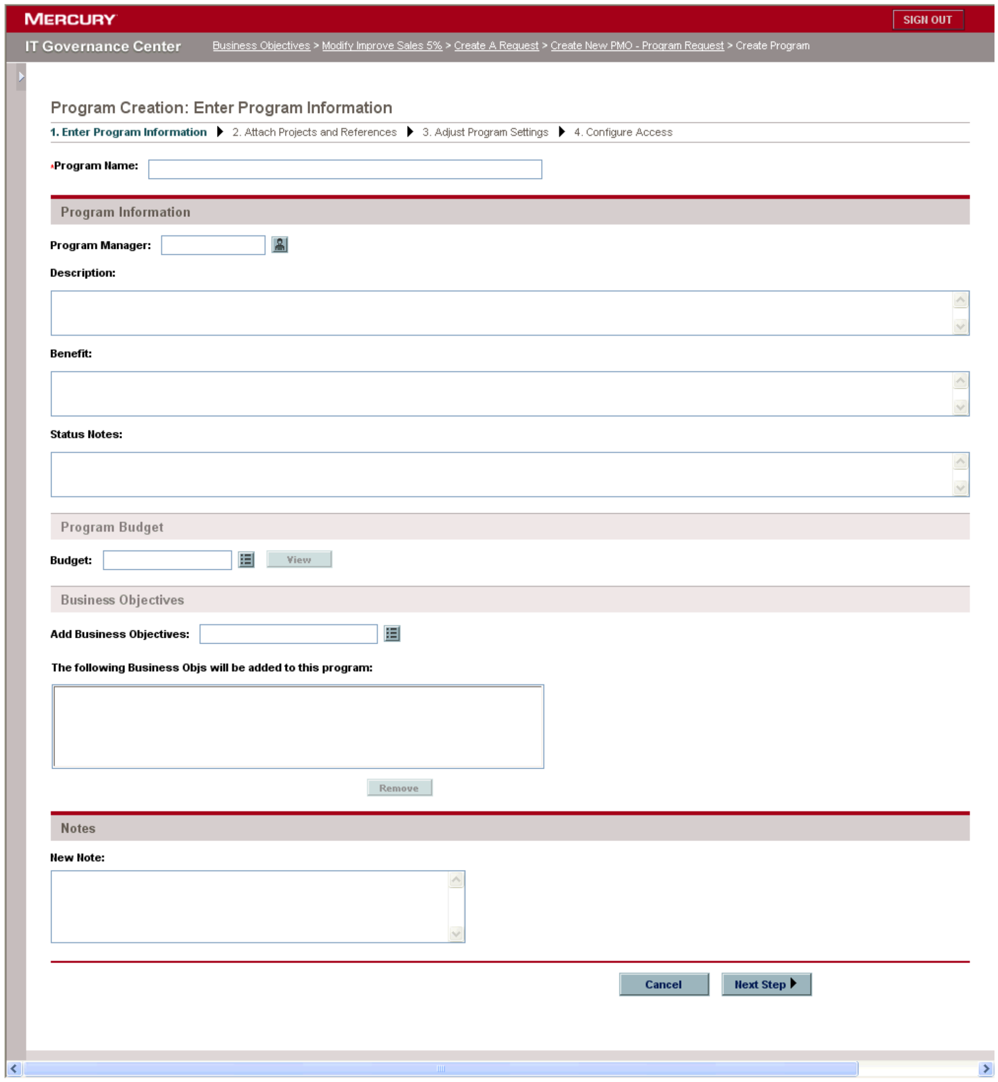
To complete the Enter Program Information page:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **Create > Program.**

   From the menu bar, you can also select **PMO > Create a Program.** The Enter Program Information page appears.



3. In the Enter Program Information page, complete the fields as specified in the following table.

Field	Description
Program Name	Enter the name of the program in the text field.
Program Manager	Selects the name of the program manager from the single-select auto-complete list.
Description	Enter a brief description of the program in the text area.
Benefit	Enter one or more benefits for the program in the text area.
Status Notes	Enter information concerning the status of the program in the text area.
Budget	The name of the budget. Select a budget for the program from the single-select auto-complete list.
Add Business Objectives	The business objectives associated with this program. Select a business objective from the multi-select auto-complete list. Once selected, the list of business objectives appears in the text area below the field. Remove a business objective by selecting a business objective and clicking **Remove.**
New Note	Enter information concerning the program in the text area.

4. At the bottom of the Enter Program Information page, click **Next Step.**

5. The information on the Enter Program Information page is saved. The Attach Projects and References page appears. For information concerning the Attach Projects and References page, see the next section (*Step Two: Attaching Projects and References*).

Step Two: Attaching Projects and References

Attaching projects and references is the second step required to create a new program. The Attach Projects and References page is displayed (see *Figure 3-2*).

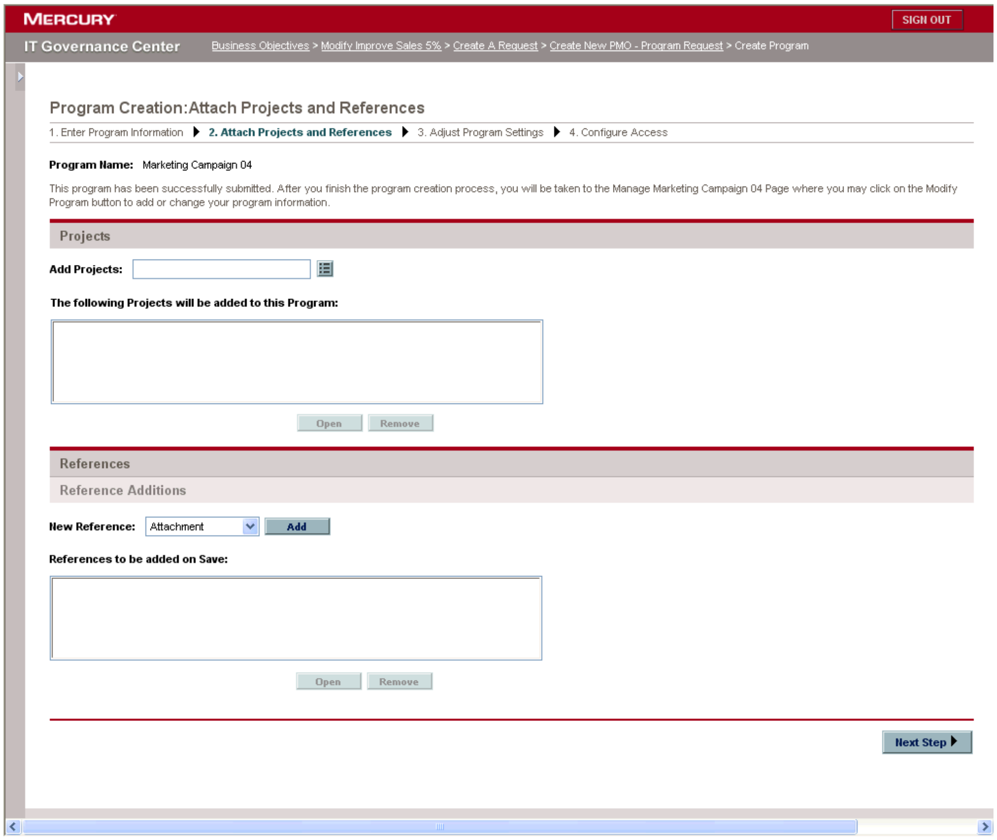


Figure 3-2. Attach Projects and References page

To complete the Attach Projects and References page:

1. In the Projects section, in the Add Projects field, select projects to attach from the multi-select auto-complete list.

   When the multi-select auto-complete window closes, the selected projects appear in the The following Projects will be added to this Program list.

   - To open a selected project, select the project and click **Open.**
   - To remove a selected project, select the project and click **Remove.**

2. Add references to the program.

   To add references to the program:

   a. If necessary, scroll down to the Reference Additions section.

   b. In the New Reference field, select the type of reference from the drop-down list and click **Add.**

      The page returned depends on the reference type. See *References* on page 38 for a complete list of the possible references and returned pages.

   c. If you see a returned page, select the reference and relationship.

   d. In the returned page, click **Add.**

      The selected reference appears in the Reference to be added on Save field.

      - To open a selected project, select the project and click **Open.**
      - To remove a selected project, select the project and click **Remove.**

3. In the Attach Projects and References page, click **Next Step.**

   The changes to the Attach Projects and References page are saved. The Adjust Program Settings page appears. For information concerning the Adjust Program Settings page, see the next section (*Step Three: Adjusting Program Settings*).

Step Three: Adjusting Program Settings

Summary condition indicators are useful to show the at-a-glance status of a program's issues, scope changes, risks, and resource requests, as well as cost data if Cost Management has been enabled for the program (see *Figure 3-3*). These indicators appear as colored icons in the Program List portlet and Manage Program page.

Each Program Management request type has its own summary condition indicator, which can be configured independently of the others. The following lists the summary condition indicators:

- **Issues.** Issues introduce a framework for all project and program-related issues to be identified and resolved. Issues can span multiple request types, enabling a finer level of visibility over the resolution process.
- **Scope Changes.** Scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. Submitted scope change requests can be assessed before being rejected or incorporated into program or project scope. Program and project scope can be controlled by ensuring that possible changes are clearly identified, aligned, and processed.
- **Risks.** Risks supply a way to log and resolve risks that threaten a program. The process of gathering information about possible risks (including impacts and probability of occurring) is streamlined.
- **Resource Requests.** Resource requests allow a program manager to more easily and quickly request and approve resources, as well as maintain visibility over resource needs and allocations.
- **Cost Indicators.** The Mercury Financial Management™ capabilities allow you to track planning-related cost data in the form of budgets. You can also capture cost data during project plan execution. This cost data can then be compared to financial data recorded in project or program budgets. The following lists the two ways cost data can be compared:
    - **Cost Performance Index (CPI).** Cost efficiency ratio of earned value to actual cost. Used to predict the magnitude of possible cost overrun. The value is calculated by dividing earned value by actual cost (CPI = EV / AC).

- **Schedule Performance Index (SPI).** Schedule efficiency ratio of earned value accomplished against planned value. Describes what portion of the planned schedule was actually accomplished. This value is calculated by dividing earned value by planned value (SPI = EV / PV).

Note

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

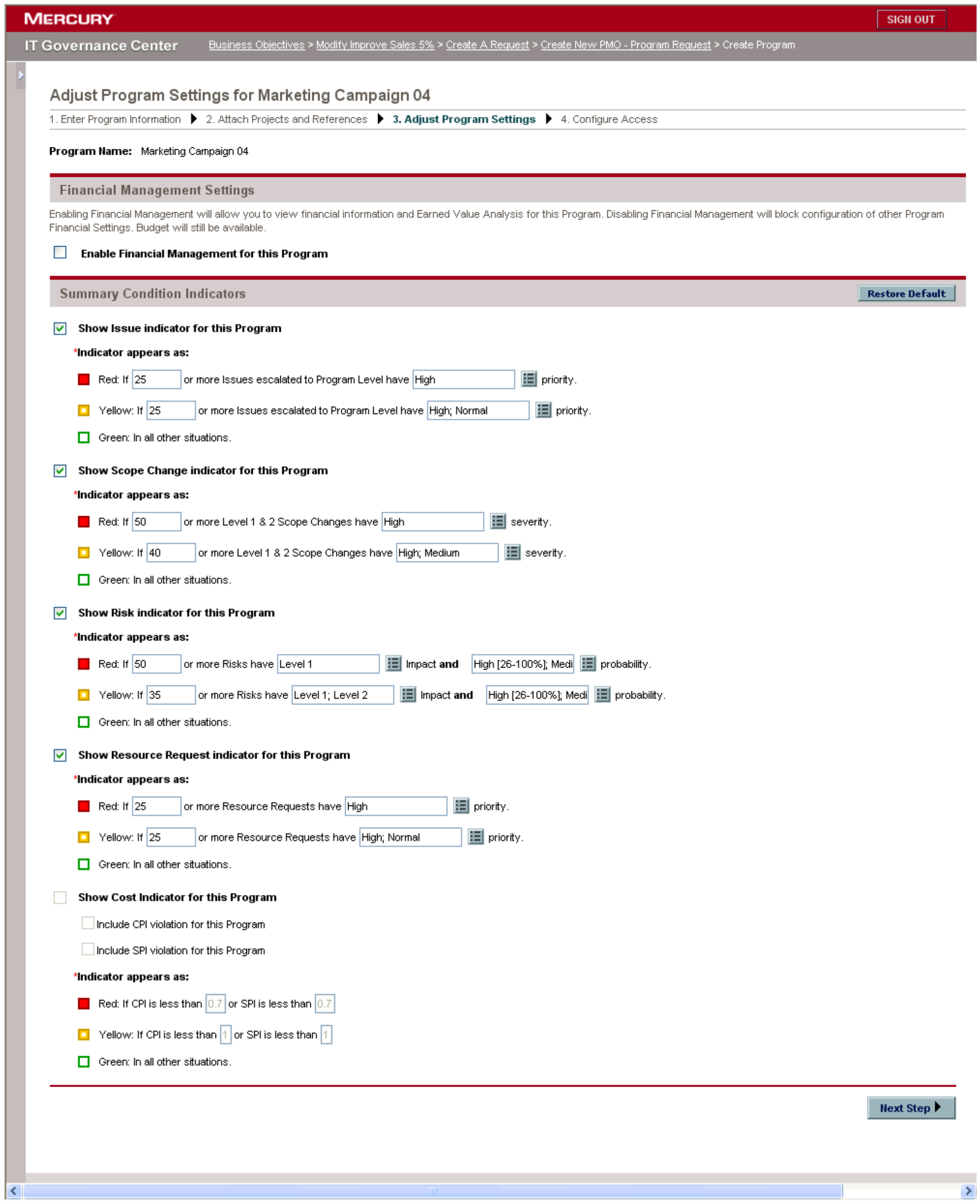


Figure 3-3. Adjust Program Settings page

To complete the Adjust Program Settings page:

1. In the Financial Management Settings section, enable or disable Financial Management for the program.

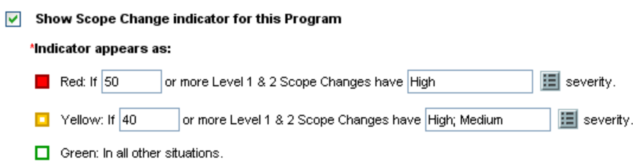
   Enabling Financial Management activates the cost indicator settings at the bottom of the Adjust Program Settings page.

- To enable Financial Management, select Enable Financial Management for the Program.
- To disable Financial Management, do not select Enable Financial Management for the Program (default).

2. Specify the triggering values for the summary condition indicators.
   - To activate a summary condition indicator:

   a. Select the Show (Request Type) indicator for this Program checkbox.

   b. Select the values for each Indicator appears as entry. For example:



3. In the Adjust Program Settings page, click **Next Step.**

   The settings for the Adjust Program Settings page are saved. The Configure Access page appears. For information concerning the Configure Access page, see the next section (*Step Four: Configuring Access*).

Step Four: Configuring Access

You can control which users can view the program, as well as the users who can view the program's cost information independently (see *Figure 3-4*). Access is configured on a per-program basis.

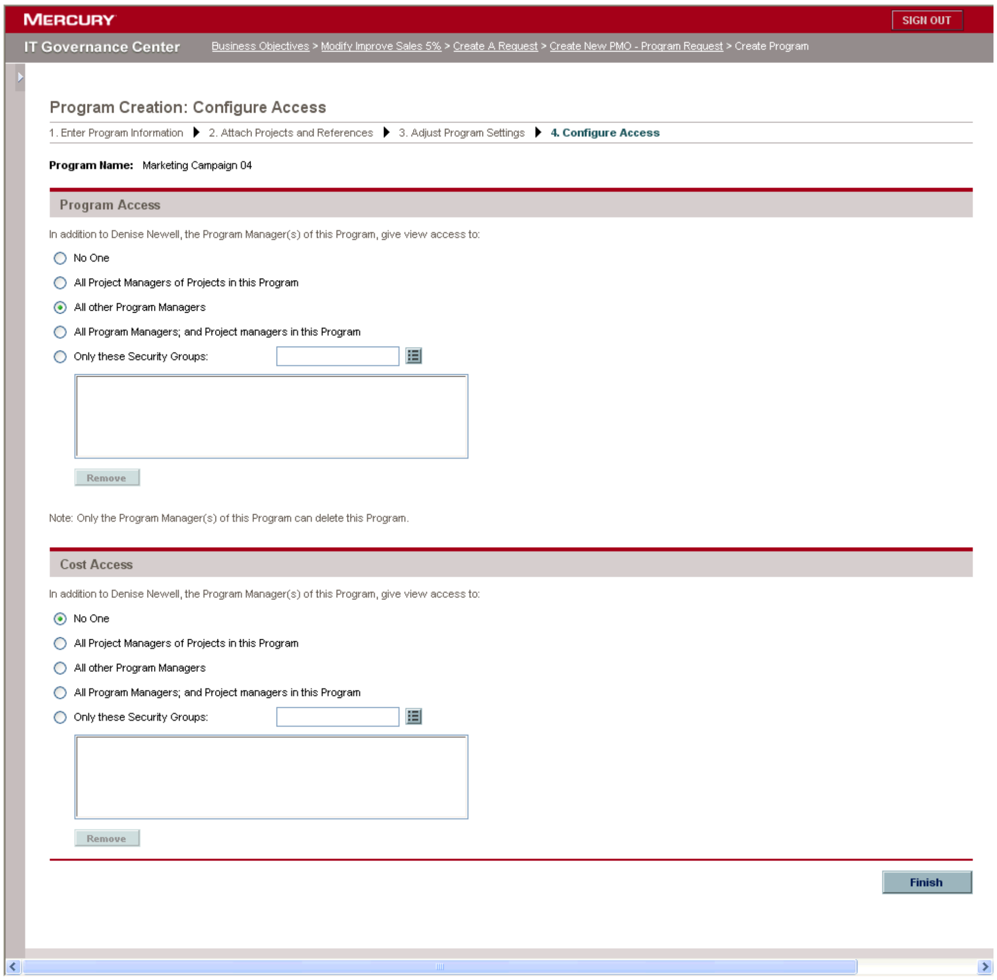


Figure 3-4. Configure Access page

To configure access to the program:

1. In the Configure Access page, select the set of users who can view the program.

   The Configure Access page consists of the following sections:

   - **Program Access.** Resources who can access the program's technical information.
   - **Cost Access.** Resources who can access the program's financial information.

2. In the Program Access section, select the users who have access to the program.

   The program manager already has full access to the program. Only one option can be selected. Select one of the following:

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

   If Only these Security Groups is selected, choose the security groups from the multi-select auto-complete list. Closing the multi-select auto-complete list adds the selected security groups to the Configure Access page. To remove a listed security group, select the security group and click **Remove.**

3. In the Cost Access section, select the set of users who can view the program's cost data.

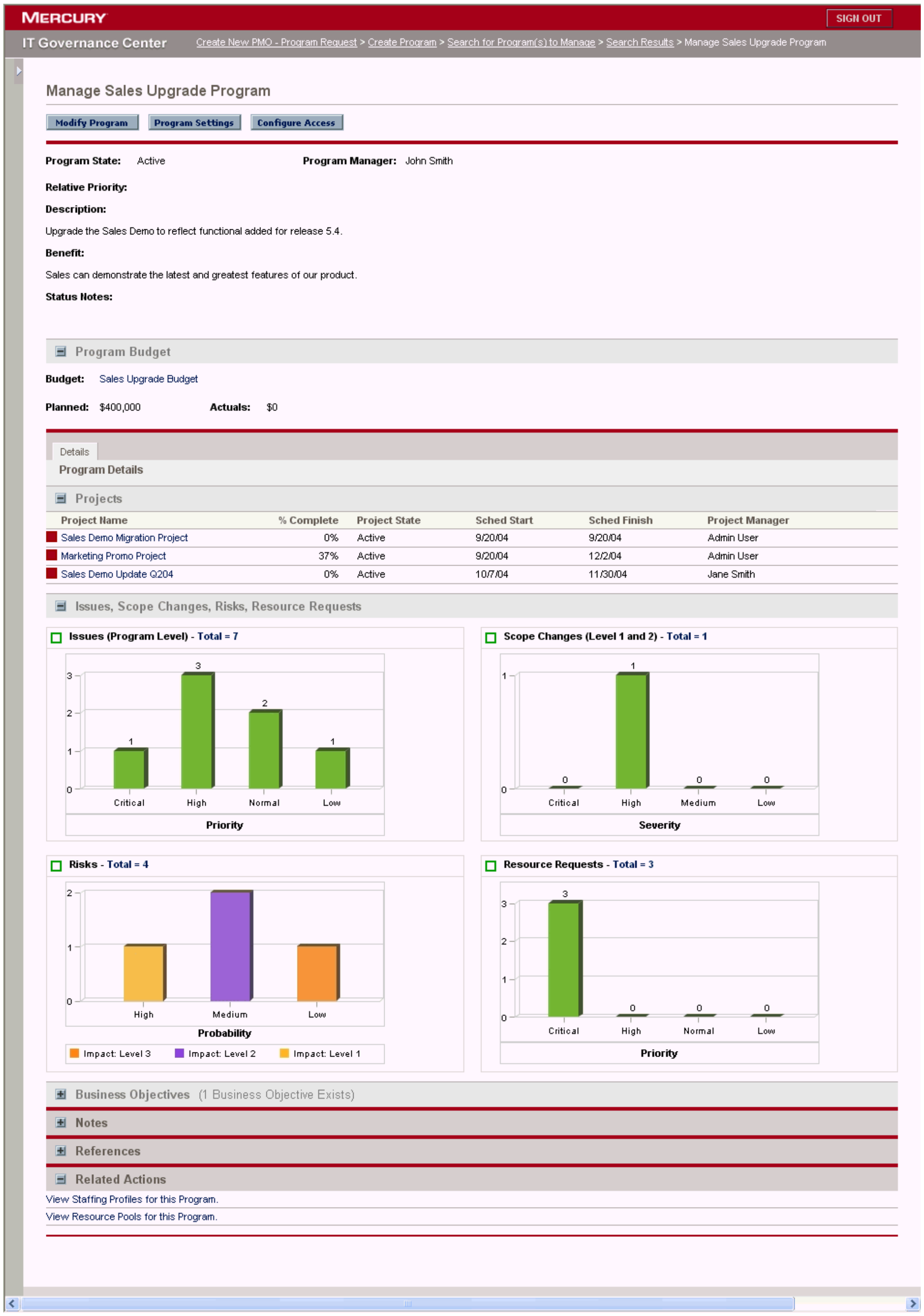
   The program manager already has full access to the program. Only one option can be selected. Select one of the following:

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

If Only these Security Groups is selected, choose the security groups from the multi-select auto-complete list. Closing the multi-select auto-complete list adds the selected security groups to the Configure Access page. To remove a listed security group, select the security group and click **Remove.**

4. In the Configure Access page, click **Finish.**

   The Manage Program page appears, displaying the new program. The following is an example of the Manage Program page.


MERCURY
SIGN OUT
IT Governance Center
Create New PMO - Program Request > Create Program > Search for Program(s) to Manage > Search Results > Manage Sales Upgrade Program
Manage Sales Upgrade Program
Modify Program
Program Settings
Configure Access
Program State: Active
Program Manager: John Smith
Relative Priority:
Description:
Upgrade the Sales Demo to reflect functional added for release 5.4.
Benefit:
Sales can demonstrate the latest and greatest features of our product.
Status Notes:
Program Budget
Budget: Sales Upgrade Budget
Planned: $400,000
Actuals: $0
Details
Program Details
Projects
Project Name
% Complete
Project State
Sched Start
Sched Finish
Project Manager
Sales Demo Migration Project 0% Active 9/20/04 9/20/04 Admin User
Marketing Promo Project 37% Active 9/20/04 12/2/04 Admin User
Sales Demo Update Q204 0% Active 10/7/04 11/30/04 Jane Smith
Issues, Scope Changes, Risks, Resource Requests
Issues (Program Level) - Total = 7
Critical
High
Normal
Low
Priority
Scope Changes (Level 1 and 2) - Total = 1
Critical
High
Medium
Low
Severity
Risks - Total = 4
High
Medium
Low
Probability
Impact: Level 3
Impact: Level 2
Impact: Level 1
Resource Requests - Total = 3
Critical
High
Normal
Low
Priority
Business Objectives (1 Business Objective Exists)
Notes
References
Related Actions
View Staffing Profiles for this Program.
View Resource Pools for this Program.

References

The following sections detail optional pages displayed when adding a reference to a program.

Adding References, Attachments

You can reference an attachment to a program. To reference an attachment, from the New Reference drop-down list, select **Attachment** and click **Add.** The Reference Attachment window opens. In Attachment, use the **Browse** icon to search for and include an attachment. In Description, enter a brief description of the attachment and click **Add** (see *Figure 3-5*).

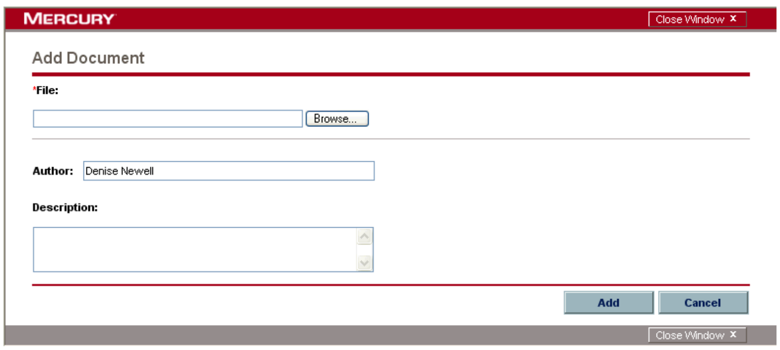


Figure 3-5. Add Document page

Adding References, Package (Existing)

You can reference existing packages to a program. To reference an existing package, from the New Reference drop-down list, select **Package (Existing)** and click **Add.** The Add References: Package window opens. On the Add References: Package, complete the search fields as required click **Search.**

The Add References: Package window displays the package(s) matching the search criteria. A list of relationship types is included on the window (see *Figure 3-6*). Select the type of relationship, the package or packages, and click **Add.**

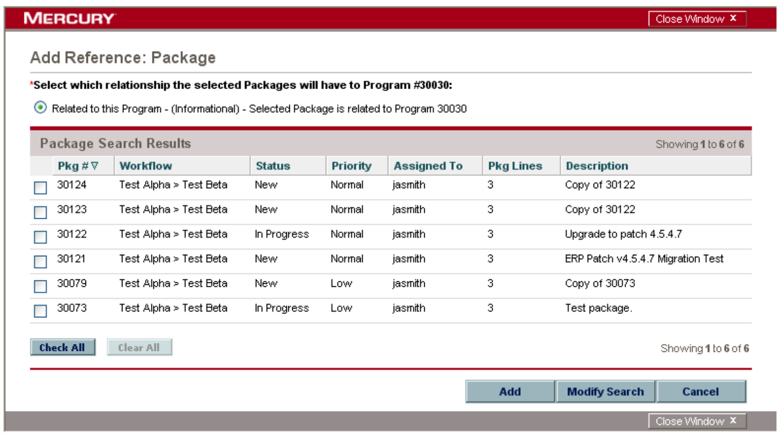


Figure 3-6. Add Reference: Package page

Adding References, Package (New)

You can reference a new package to a program. To reference a new package as a reference, from the New Reference drop-down list, select **Package (New)** and click **Add.** The Create New Package window opens. In the Create New Package window, select the relationship and click **Create.** The New Package window opens. Complete the New Package window and click **Save.**

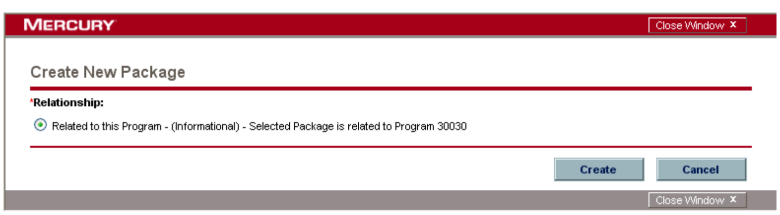


Figure 3-7. Create New Package page

Adding References, Project

To attach existing projects as a reference, from the New Reference drop-down list, select **Project** and click **Add.** The Add Reference: Project window opens. In the Add Reference: Project window, complete the search fields as required and click **Search.**

The Add Reference: Project window displays the projects matching the search criteria. A list of relationship types is included on the page (see *Figure 3-8*). In the Add Reference: Project window, select the type of relationship, the project, and click **Add.**

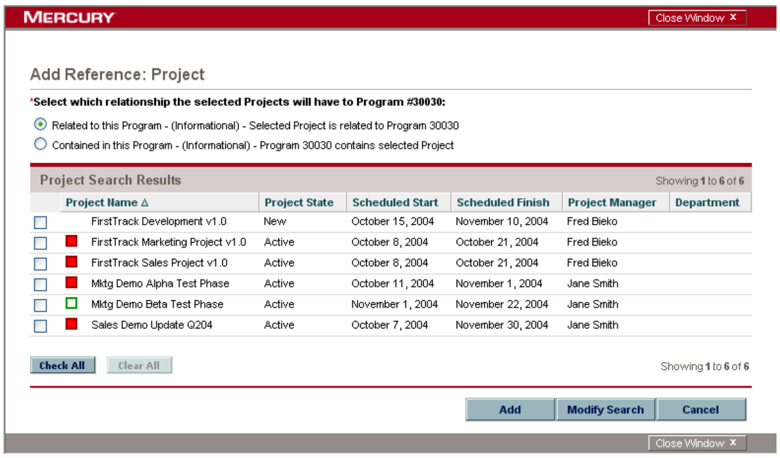


Figure 3-8. Add Reference Project page

Adding References, Request (Existing)

You can reference existing requests to programs. To reference an existing request, from the New Reference drop-down list, select **Request (Existing)** and click **Add.** The Add Reference: Request window opens. In the Add Reference: Request window, complete the search fields as required click **Search.**

The Add Reference: Request window displays the requests matching the search criteria. A list of relationship types is included (see *Figure 3-9*). Select the type of relationship, the existing request or requests, and click **Add.**

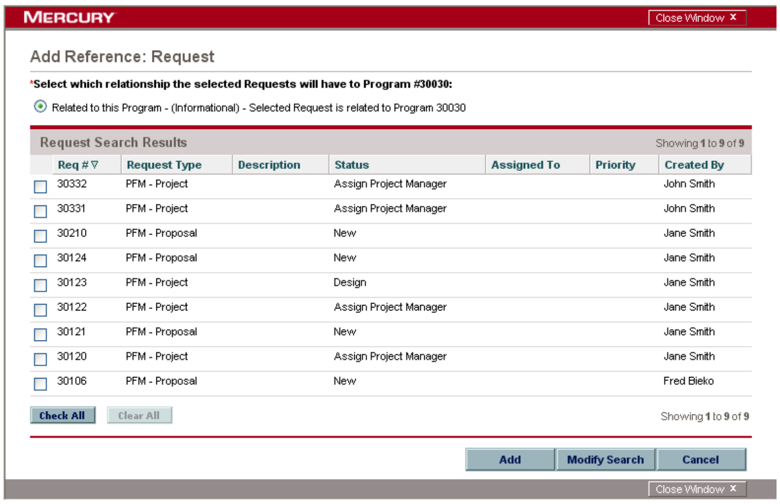


Figure 3-9. Add Reference Request page

Adding References, Request (New)

You can reference new requests to a program. To reference a new request, from the New Reference drop-down list, select **Request (New)** and click **Add.** The Create New Request window opens. In Request Type, select the type of request to create. In the Create New Request window, select a relationship and click **Create** (see *Figure 3-10*).

The Create New Request window displays the fields of the selected request type. Complete the Create New Request window as required and click **Save.**

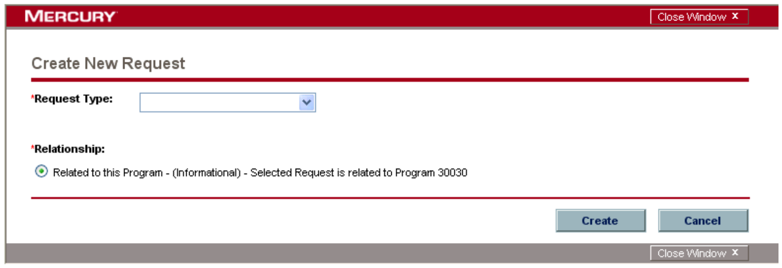


Figure 3-10. Create New Request page

Adding References, Task

You can reference existing tasks to programs. To reference an existing task, from the New Reference drop-down list, select **Task** and click **Add.** The Add Reference: Task window opens. In the Add Reference: Task window, complete the search fields as required click **Search.**

The Add Reference: Task window displays the tasks matching the search criteria. A list of relationship types is included (see *Figure 3-11*). In the Add Reference: Task window, select the type of relationship, the existing task or tasks, and click **Add.**

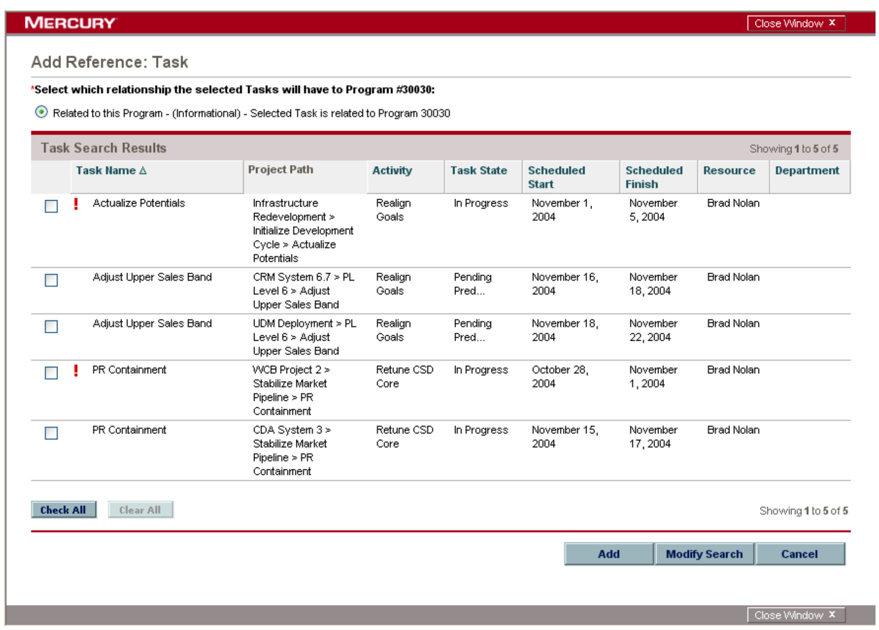


Figure 3-11. Add Reference Task page

Adding References, URL

You can reference an existing URL to a program. To reference an existing URL, from the New Reference drop-down list, select **URL** and click **Add.** The Reference URL window opens. In URL, enter the URL address. In Description, enter a brief description of the URL and click **Add** (see *Figure 3-12*).

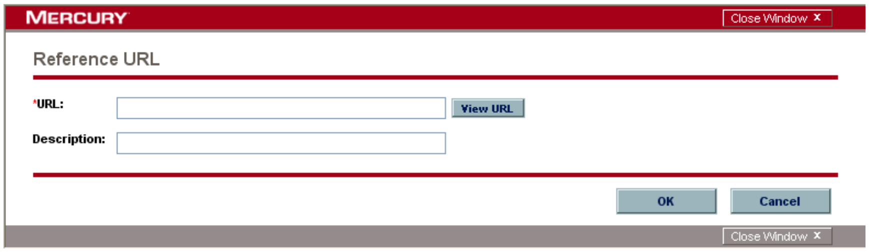


Figure 3-12. Reference URL page

Chapter

4

Managing Programs

In This Chapter:

Overview of Managing Programs

This chapter describes how to manage existing programs. During a program's life cycle, many events can occur.

- Risks may develop
- Program project scope could change
- Resources might be needed
- Issues may arise
- Associated projects will finish, might stall, or be canceled altogether
- Business objectives could change or become obsolete
- Any references may close out or otherwise change

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

- Issues
- Resource Requests
- Risks
- Scope Changes

The Manage Program page (see *Figure 4-1*) provides a central location to view a program's details, observe the effects of the events, and to make changes.

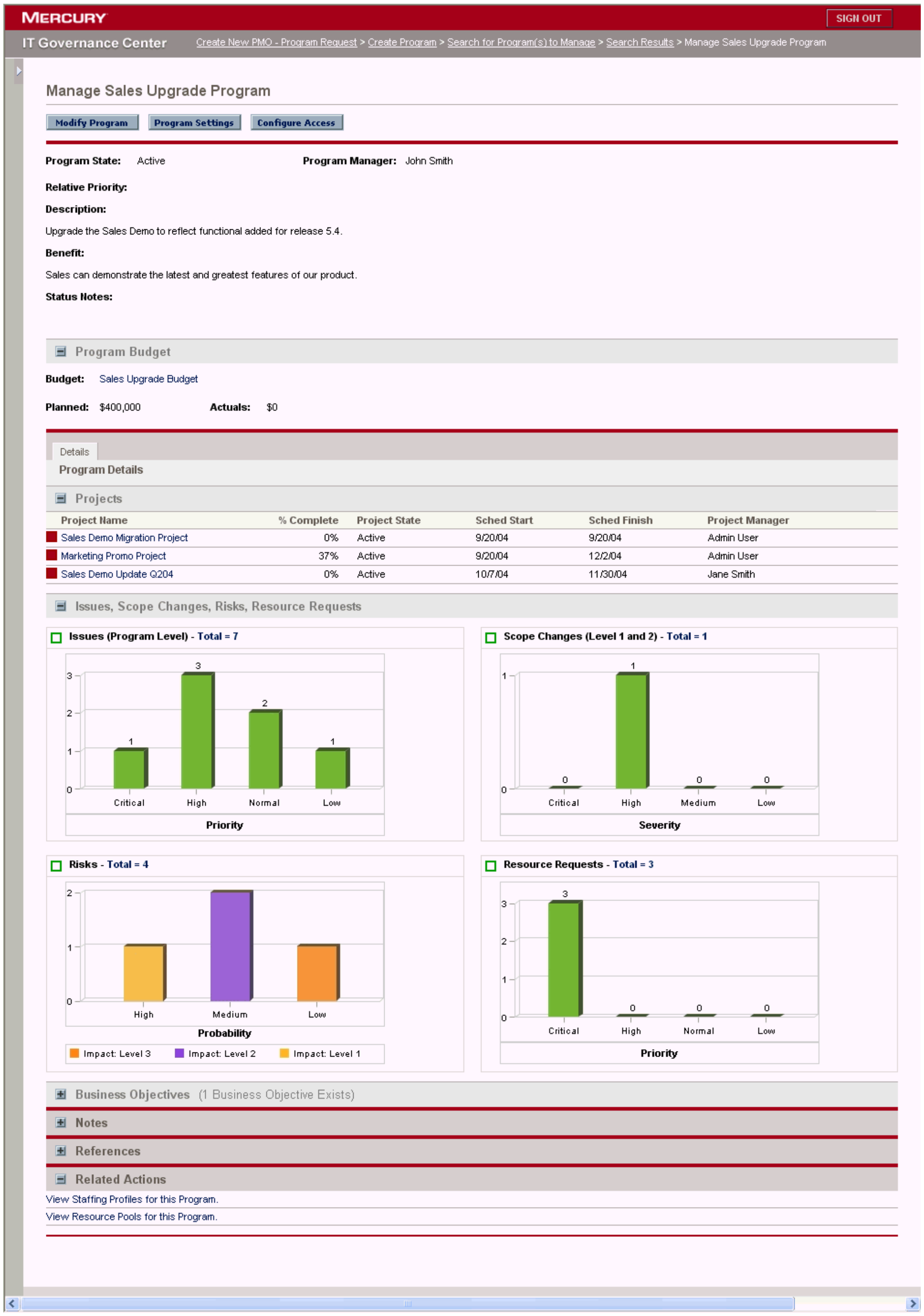


Figure 4-1. Manage Program page

Opening Programs in the Manage Program Page

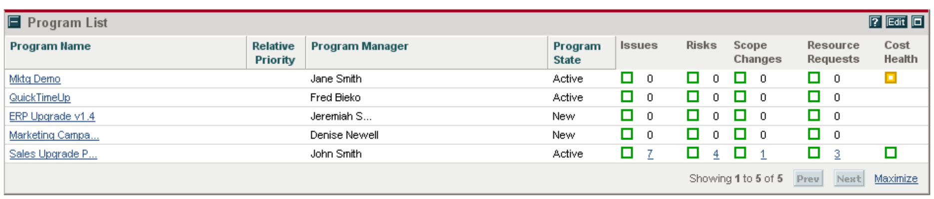
Opening a program in the Manage Program page can be done in one of two ways:

- Using the Program List portlet
- Using the Search Programs to Manage page

Using the Program List Portlet

The Program List portlet provides a high-level summary of the details and current status of all programs in your system by default (see *Figure 4-2*).

- From the Program List portlet, click on a Program Name to proceed to the Manage Program page for that program.


Program List

Program Name	Relative Priority	Program Manager	Program State	Issues	Risks	Scope Changes	Resource Requests	Cost Health
Mktg Demo		Jane Smith	Active	0	0	0	0	
QuickTimeUp		Fred Bieko	Active	0	0	0	0	
ERP Upgrade v1.4		Jeremiah S...	New	0	0	0	0	
Marketing Campa...		Denise Newell	New	0	0	0	0	
Sales Upgrade P...		John Smith	Active	7	4	1	3	

Showing 1 to 5 of 5 Prev Next Maximize

Figure 4-2. Program List portlet

Searching for Programs to Manage

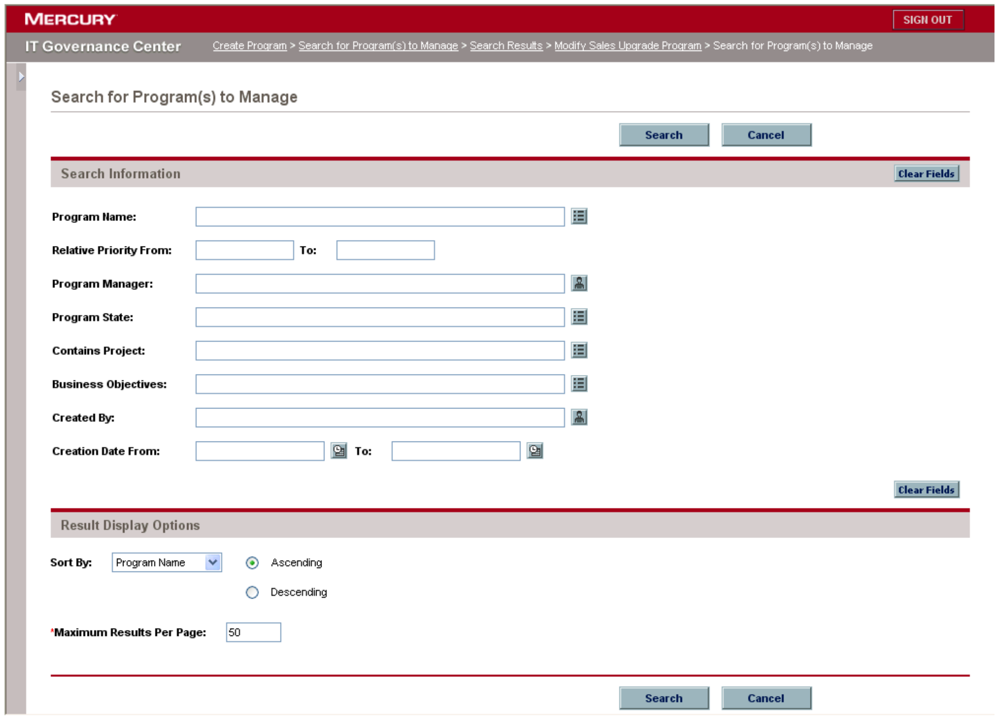
To search for programs to manage:

1. Log on to Mercury IT Governance Center.

   The standard interface is displayed.

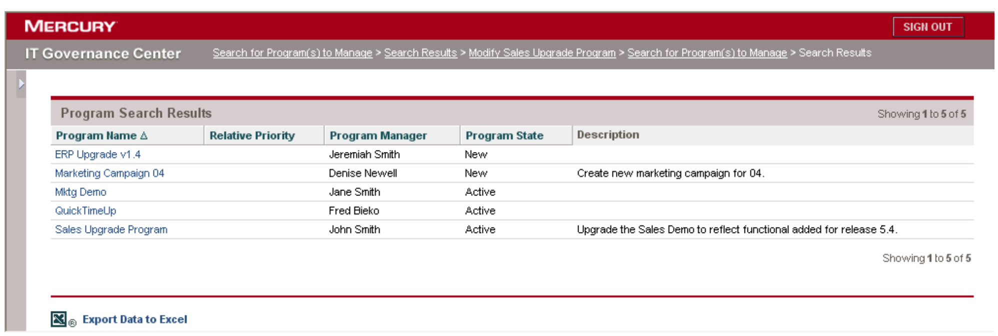
2. From the menu bar, select **PMO > Manage Programs.**

   The Search for Programs to Manage page appears.



3. In the Search for Programs to Manage page, complete the search criteria and click **Search.**

   The Program Search Results page appears.



4. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

Using the Manage Program Page

The Manage Program page provides a real-time overview of a program. The Manage Program page provides you with the following:

- An overview of an entire program
- Links to program-related information
- drilldown pages for more specific program-related information
- The ability to update program-related information

Each Manage Program page has the following sections:

- **Program Information.** The Program Information section contains general information regarding the program, as well as a list of projects belonging to the program, the budget, business objectives, issues, scope changes, risks, and resource requests.
- **Notes.** The Notes section lists all program notes and allows you to add new notes.
- **References.** The References section lists all program references and allows you to add new references.
- **Related Actions.** The Related Actions section lists links to pages containing information related to the program. These links can include views into the program's staffing profiles and views into the program's resource pools.

At the top of each Manage Program page are the following buttons:

- **Modify Program.** Click the **Modify Program** button to open the Modify Program page. From the Modify Program page, you can modify, update, add, and delete program related information. See *Modifying Programs* on page 73 for more information.
- **Program Settings.** Click the **Program Settings** button to open the Adjust Program Settings page. From the Adjust Program Settings page, you can modify a program's summary condition indicators. See *Modifying Program Indicators* on page 77 for more information.
- **Configure Access.** Click the **Configure Access** button to open the Configure Access Program page. From the Configure Access Program page, you can change a program's access permissions. See *Modifying Program Access* on page 79 for more information.

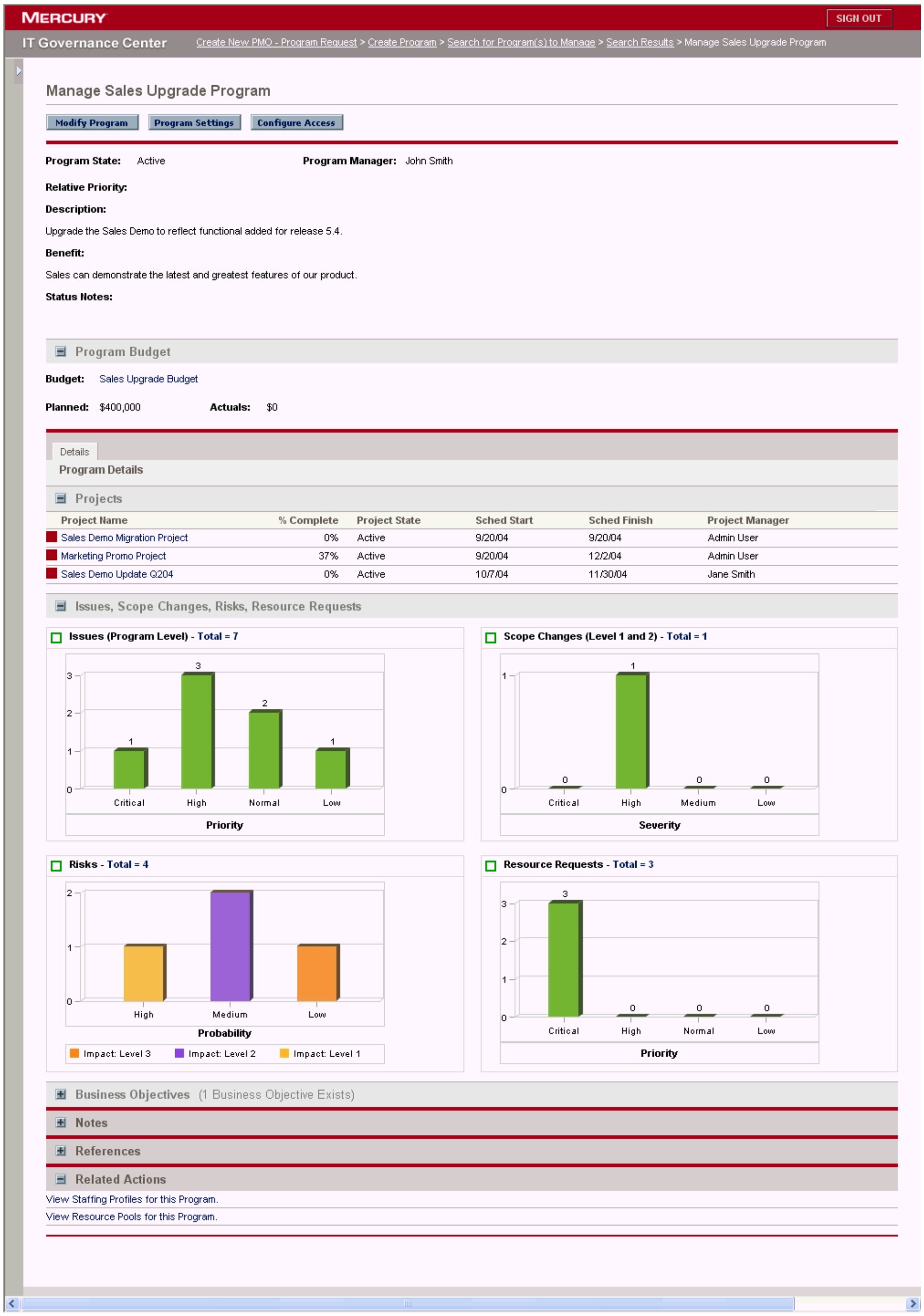


Figure 4-3. Manage Program page

Managing Program Projects

There are two places to obtain a convenient overview of projects associated with a program:

- Using the Program Project List portlet
- Using the Projects section of the Manage Program page

Using the Program Project List Portlet

The Program Project List portlet provides a view into all the projects associated with a program and their respective health (see *Figure 4-4*). This portlet can have multiple instances for viewing different programs and their associated projects. You can select which projects the portlet displays based on a number of specified criteria including project name, state, and summary condition.

- In the Program Project List portlet, click on a Project Name to proceed to that project's Overview page.

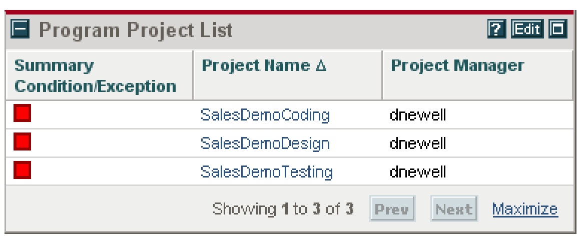


Figure 4-4. Program Project List portlet

Managing Projects Using the Manage Program Page

The Manage Program page displays a list of projects associated with a program.

- In the Manage Program, click on a Project Name to proceed to that project's Overview page.

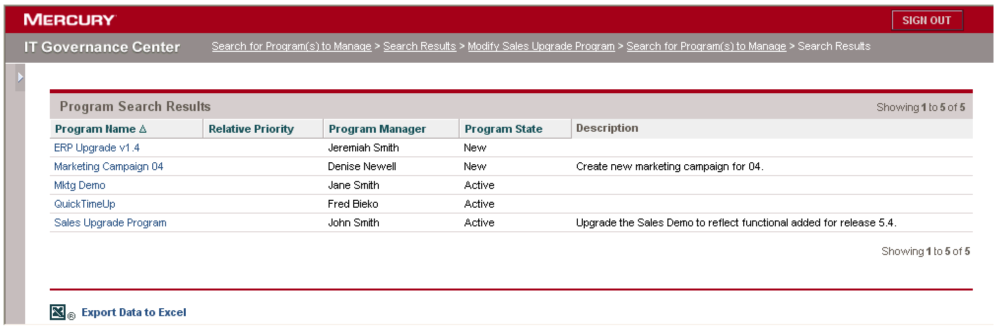


Figure 4-5. Manage Program page, Projects section

Managing Program Costs

You can associate existing budgets with existing programs. Furthermore, you can set a program budget to automatically roll up actual values from the budgets of the projects in the program. This allows you to:

- Track the financial performance of a program
- Compare project budgets within the program
- Track actual cost data in project plans and programs
- Roll up project budgets into program budgets
- Track capitalization down to the task level
- Monitor capital exposure at the project and program level

Enabling cost tracking can be done when first creating a program or modifying an existing program. For more information, see the *Mercury Financial Management User's Guide*.

You can analyze cost data for programs by doing one of the following:

- On the Manage Programs page for a specific program, select the **EV Analysis** tab (see *Figure 4-6*).
- From the menu bar, select **Cost > Analyze > Programs > Current** or **Cumulative Cost Metrics.**

Figure 4-6. Analyze cumulative costs

Managing Program Resources

When creating staffing profiles or resource pools, you can associate them with a program. These staffing profiles and resource pools then appear as links under the Related Actions section of the Manage Program page (see *Figure 4-7*).

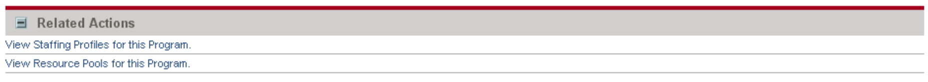


Figure 4-7. Manage Program page, Related Actions section

For More Information

For more information concerning the creation of staffing profiles or resource pools, see the *Resource Management User's Guide*.

Managing Resource Pools

A resource pool defines a group of resource, organized by skill or resource name, from which staffing profiles can draw for their staffing needs. Each line in a resource pool presents the planned capacity, within the pool, for some skill or resource (by name) over a range of fiscal months. Resource pools provide a way for managers to plan the forecast workload capacity of a group of resources. *Figure 4-8* shows a resource pool.

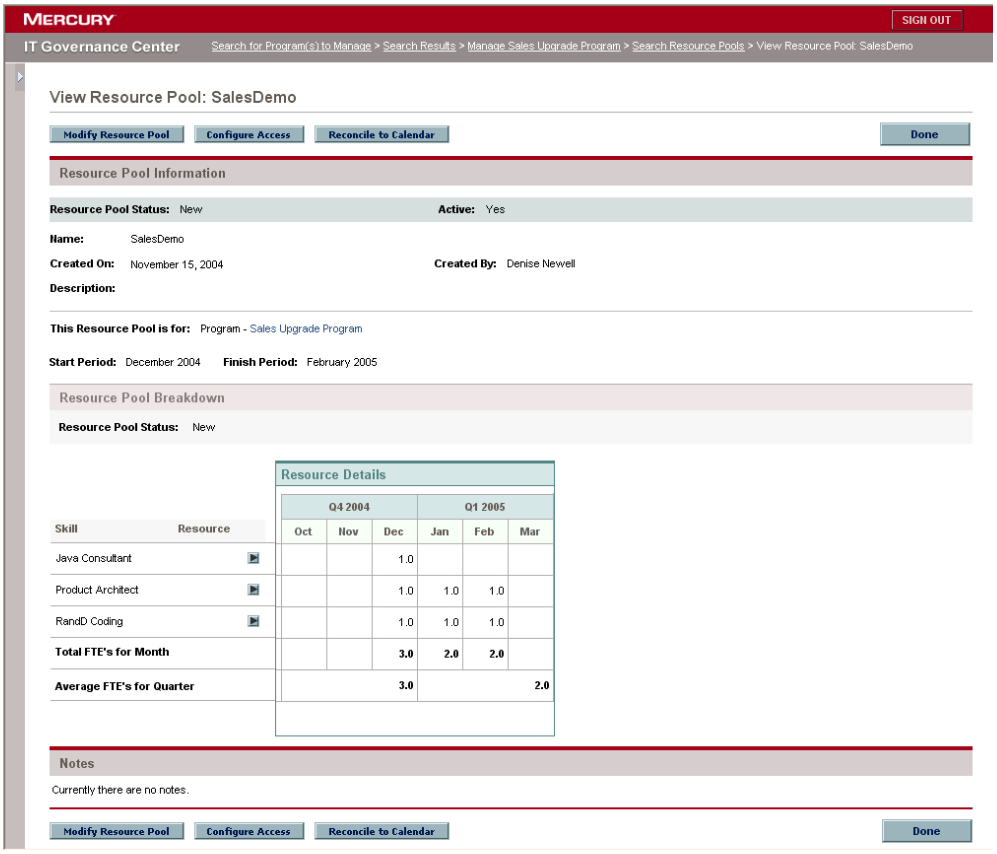
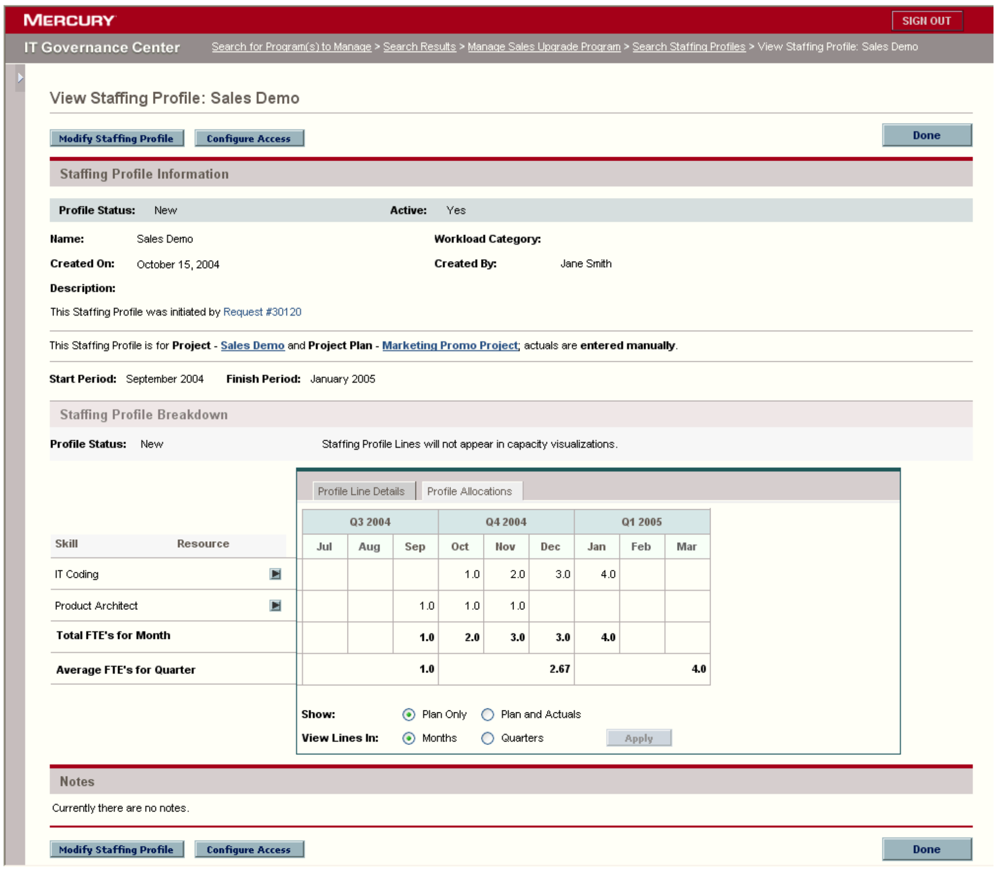


Figure 4-8. Resource Pool page

Managing Staffing Profiles

A staffing profile specifies an allocation of resources between specified start and finish dates. If the staffing profile is linked to a program, the staffing profile also represents the resources budgeted for the program. Staffing profiles specify the skills and resources allocated. Each line in a staffing profile indicates an allocation of one or more resources in some or all time periods. Each line can designate a skill or a specific resource in the system. A staffing profile is shown in *Figure 4-9* on page 57.



Skill	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
IT Coding				1.0	2.0	3.0	4.0		
Product Architect			1.0	1.0	1.0				
Total FTE's for Month			1.0	2.0	3.0	3.0	4.0		
Average FTE's for Quarter			1.0			2.67			4.0

Figure 4-9. Staffing Profile page

Managing Program Issues

During the life of a program, concerns can surface that need to be dealt with. Issues introduce a framework for such concerns to be identified and resolved in the form of requests that can be tracked and reported on. Issues can be filed directly against a program, or escalated from the projects linked to the program. This allows a project manager to work with project-level issues and escalate only those issues requiring program-level attention.

There are two places to obtain a convenient overview of issues associated with a program:

- Using the Program Issue List portlet
- Using the Issues, Scope Change, Risks, Resource Requests section of the Manage Program page

Using the Program Issue List Portlet

The Program Issue List portlet lists all the issues associated with a selected program (see *Figure 4-10*). The Program Issue List portlet can have multiple instances for viewing different programs and their associated Issues. The Program Issue List portlet can be personalized to display issues based on specified criteria (Status, Priority, Escalation Level, and so forth).

You can also specify how the issues are grouped. Mercury IT Governance Center users with the proper level of access can also use the Workbench to specify which columns should be included in the Program Issue List portlet's display.

- In the Program Issue List portlet, if the issue is associated with a project, click on the Project Name to see its Project Overview page.
- In the Program Issue List portlet, click on the Issue # to see the Issue page.

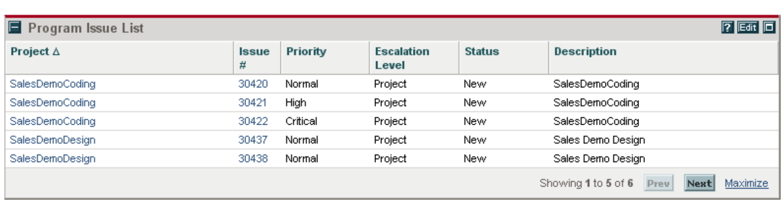


Figure 4-10. Program Issue List portlet

Managing Issues Using the Manage Program Page

The Manage Program page has a bar chart summarizing the issues submitted for the program.

- In the Manage Program page, click on the bar for any issue group to go to the drilldown page listing all the issues in that particular group.
  - From the drilldown page, if the issue is associated with a project, click on the Project Name to see its Project Overview page.
  - From the drilldown page, click on the Issue # to see the Issue page.

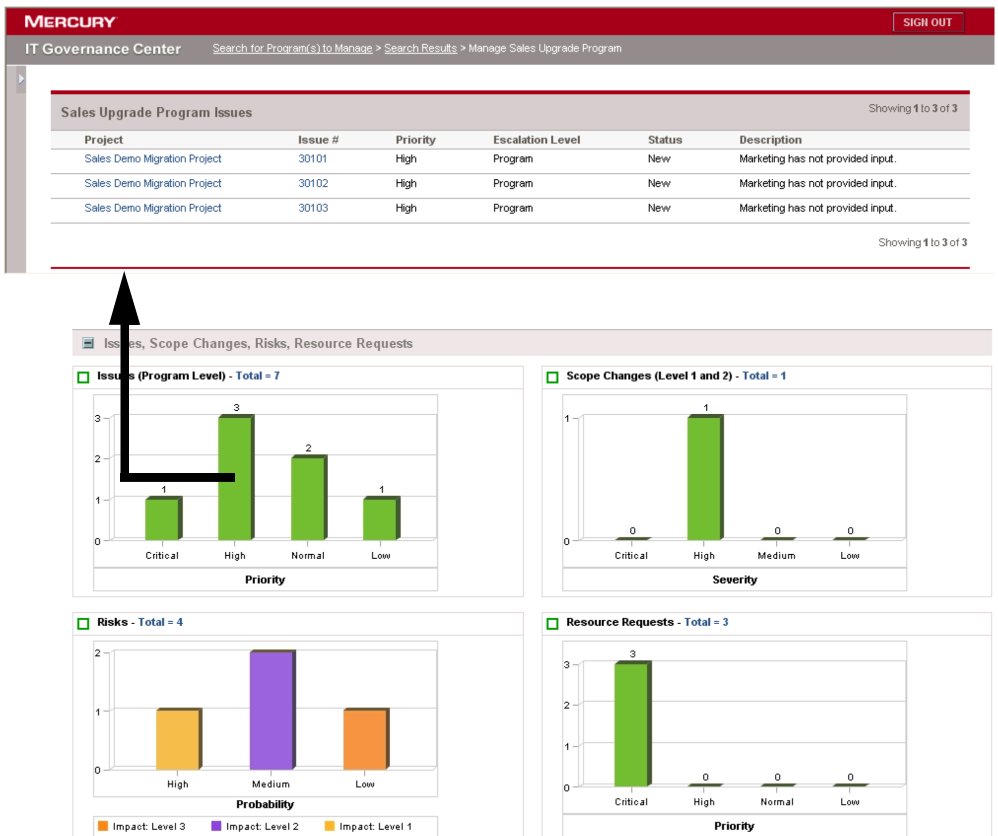


Figure 4-11. Managing issues

Managing Program Scope Changes

During the life cycle of a program, some problem or business decision may occur that necessitates a change in the program's scope. These changes can be brought up, processed, and decided upon in the form of scope change requests.

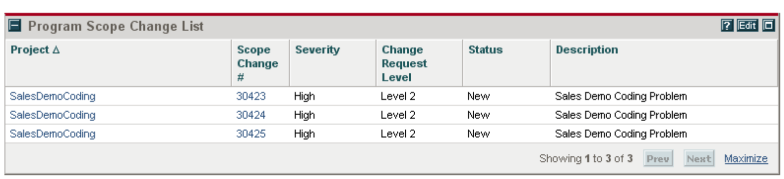
There are two places to obtain a convenient overview of scope changes associated with a program:

- Using the Program Scope Change List portlet
- Using the Issues, Scope Change, Risks, Resource Requests section of the Manage Program page.

Using the Program Scope Change List Portlet

The Program Scope Change List portlet lists all the scope changes associated with a particular program (see *Figure 4-12*). The Program Scope Change List portlet can have multiple instances for viewing different programs and their associated scope changes. The Program Scope Change List portlet can be personalized to display scope changes based on specified criteria (Status, Severity, CR Level, and so forth).

- In the Program Scope Change List portlet, if the scope change is associated with a project, click on the Project Name to see its Project Overview page.
- In the Program Scope Change List portlet, click on the Scope Change # to see the scope change's Scope Change page.


Program Scope Change List

Project ∆	Scope Change #	Severity	Change Request Level	Status	Description
SalesDemoCoding	30423	High	Level 2	New	Sales Demo Coding Problem
SalesDemoCoding	30424	High	Level 2	New	Sales Demo Coding Problem
SalesDemoCoding	30425	High	Level 2	New	Sales Demo Coding Problem

Showing 1 to 3 of 3 Prev Next Maximize

Figure 4-12. Program Scope Change List portlet

Managing Scope Changes Using the Manage Program Page

The Manage Program page has a bar chart summarizing the scope changes submitted for the program.

- In the Manage Program page, click on the bar for any scope change group to go to the drilldown page listing all the scope changes in that particular group.
  - In the drilldown page, if the scope change is associated with a project, click on the Project Name to see its Project Overview page.
  - In the drilldown page, click on the Scope Change # to see the scope change's Scope Change page.

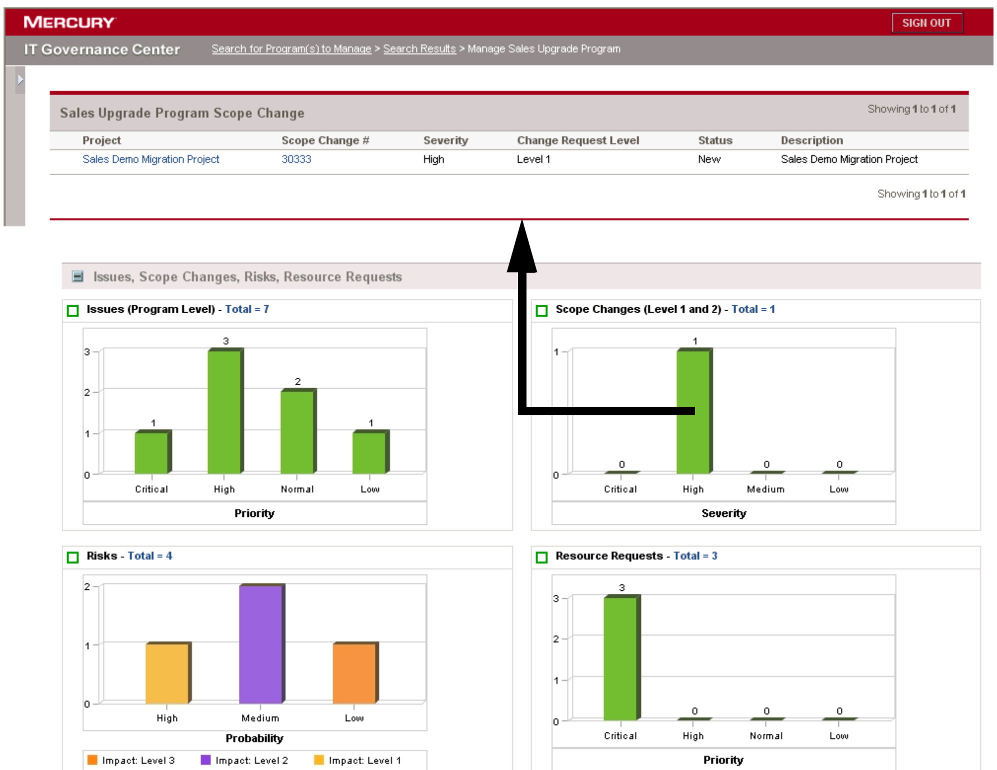


Figure 4-13. Managing scope changes

Managing Program Risks

Risks to a program might be identified during its life cycle. The Program Management Risk request type is a way to identify these risks, collect key information about them (impact level and probability of occurring), and deal with them in a timely manner.

There are two places to obtain a convenient overview of risks associated with a program:

- Using the Program Risk List portlet
- Using the Issues, Scope Change, Risks, Resource Requests section of the Manage Program page.

Using the Program Risk List Portlet

The Program Risk List portlet lists all the risks associated with a particular program (see *Figure 4-14*). The Program Risk List portlet can have multiple instances for viewing different programs and their associated risks. The Program Risk List portlet can be personalized to display risks based on specified criteria (Status, Impact Level, Probability, and so forth).

- In the Program Risk List portlet, if the risks are associated with a project, click on the Project Name to see its Project Overview page.
- In the Program Risk List portlet, click on the Risk # to see the Risk page.

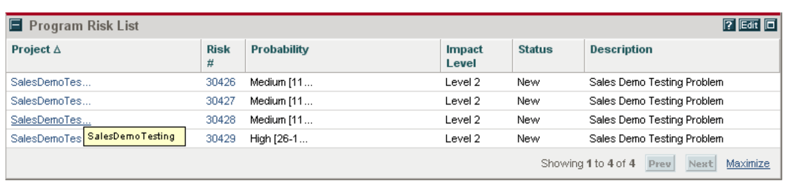


Figure 4-14. Program Risk List portlet

Managing Risks Using the Manage Program Page

The Manage Program page has a bar chart summarizing the risks submitted for the program.

- In the Manage Program page, click on the bar for any risk group to go to the drilldown page listing all the Risks in that particular group.
  - In the drilldown page, if the risk is associated with a project, click on the Project Name to see its Project Overview page.
  - In the drilldown page, click on the Risk # to see the Risk page.

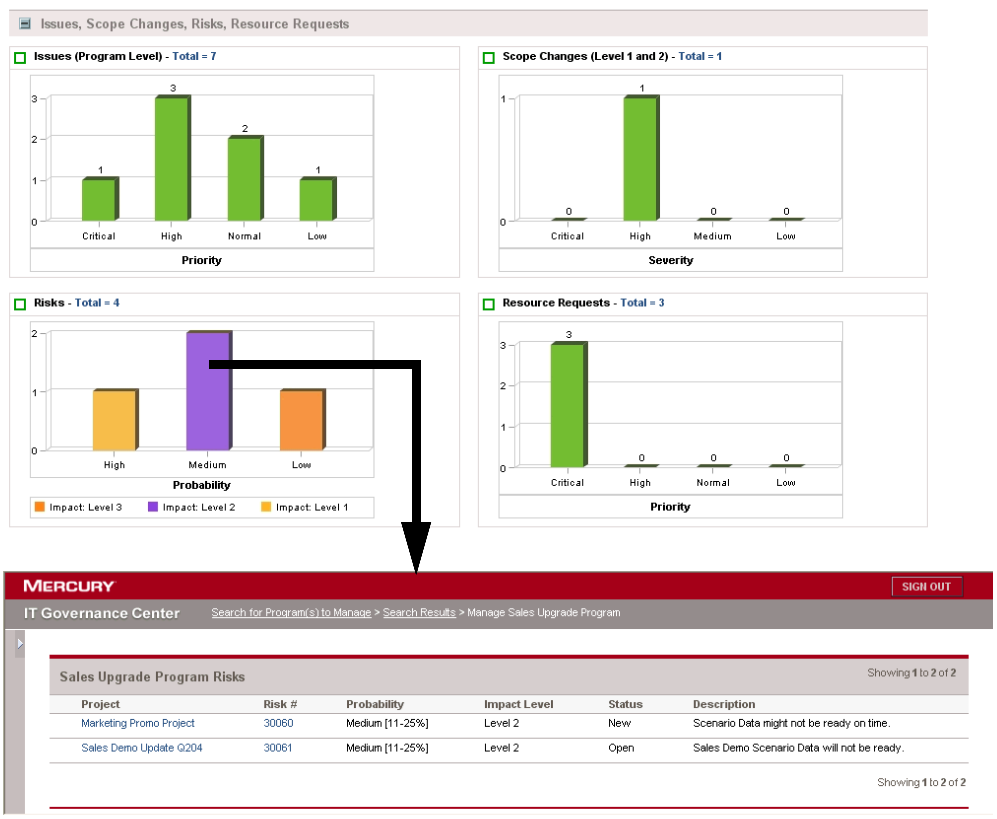


Figure 4-15. Managing risks

Managing Program Resource Requests

A program manager might need to ask for additional resources from other departments from time to time. The program manager may also want to view current resource allocations to determine program areas that are overloaded or understaffed. Resource Requests and Program Management portlets help the program manager to accomplish these tasks more easily and efficiently.

There are three places to obtain a convenient overview of resource requests associated with a program:

- Using the Resource Assignments portlet
- Using the Program Resource Request List portlet
- Using the Issues, Scope Change, Risks, Resource Requests section of the Manage Program page

Using the Resource Assignments Portlet

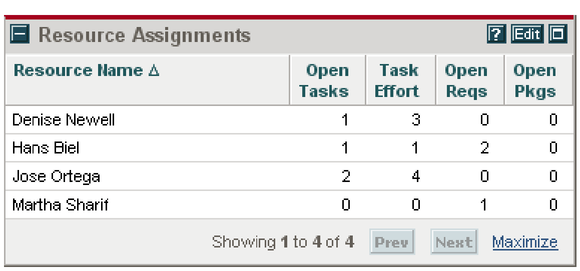
The Resource Assignments portlet provides a quick view of the workload for resources or groups of resources and the tasks, requests, and packages assigned to each (see *Figure 4-16* on page 64).

You can choose to display resources based on:

- Resource Group
- Project Team
- Resource Name

Additionally, the request types displayed in the portlet can be filtered. For example, you can personalize the portlet to display members of a resource group and the number of bugs assigned to each.

- In the Resource Assignments portlet, click on the number of tasks, requests, or packages to go to the task, request, or package drilldown page.



Resource Name	Open Tasks	Task Effort	Open Reqs	Open Pkgs
Denise Newell	1	3	0	0
Hans Biel	1	1	2	0
Jose Ortega	2	4	0	0
Martha Sharif	0	0	1	0

Figure 4-16. Resource Assignment portlet

Using the Program Resource Request List Portlet

The Program Resource Request List portlet lists all the resource requests associated with a particular program. The Program Resource Request List portlet can have multiple instances for viewing different programs and their associated resource requests. The Program Resource Request List portlet can be personalized to display resource requests based on specified criteria (Created in the last X days, Status, Priority, and so forth). You can also specify how the resource requests are grouped. Mercury IT Governance Center users with the proper level of access can also use the Workbench to specify which columns should be included in the Program Resource Request List portlet's display.

- In the Program Resource Request List portlet, if the resource request is associated with a project, click on the Project Name to see its Project Overview page.
- In the Program Resource Request List portlet, click on the Resource Request # to see the Resource Request page.

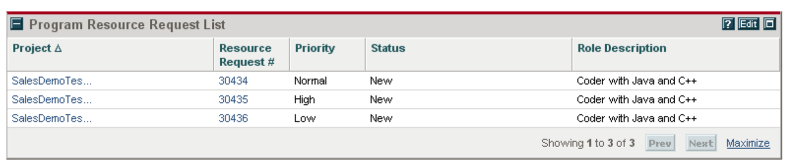


Figure 4-17. Resource Request List portlet

Managing Resource Requests Using the Manage Program Page

The Manage Program page has a bar chart summarizing the resource requests submitted for the program.

- In the Manage Program page, click on the bar for any resource request group to go to the drilldown page listing all the resource requests in that particular group.
  - In the drilldown page, if the resource request is associated with a project, click on the Project Name to see its Project Overview page.
  - In the drilldown page, click on the Resource Request # to see the Resource Request page.

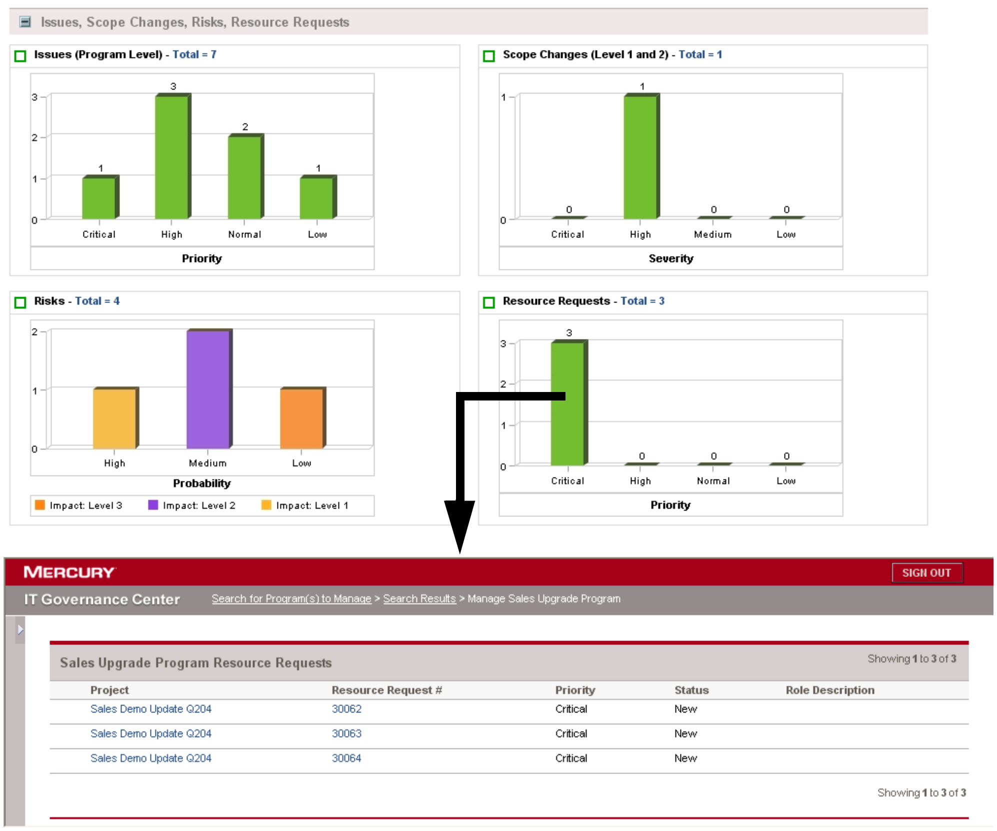


Figure 4-18. Managing resource requests

Analyzing Programs

Program Management provides two sets of interactive analysis that can be used to view useful information concerning the four Program Management request types.

Using Activity Analysis

The Activity Analysis for Program Management appears resolution and creation numbers for a category of Program Management request (issues, resource requests, risks, or scope changes) in parallel bar charts. Using the Activity Analysis for Program Management gives you visibility into key trends for controls related to a program.

The chart display can be filtered according to several useful variables:

- Program Name (required)
- Projects
- Resolution Date From/To (required)
- Period

To filter the chart display, enter the desired criteria into the proper fields and click **Apply.** The Activity Report page reloads with the new filter criteria applied.

To access the Activity Analysis for a Program Management request:

1. Log on to Mercury IT Governance Center.

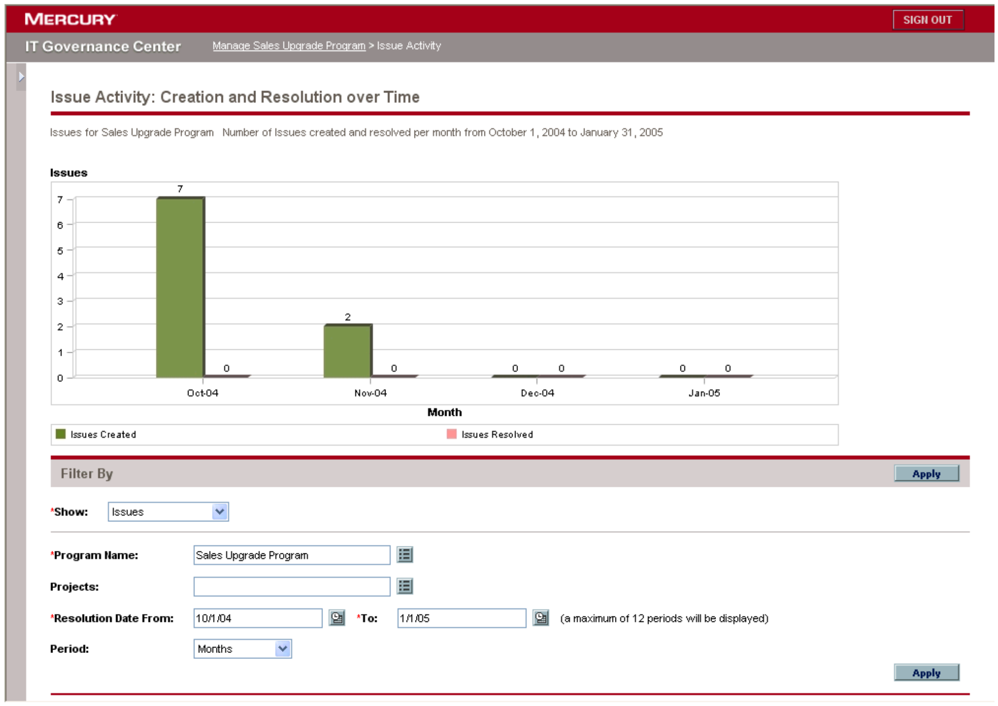
   The standard interface is displayed.

2. From the menu bar, select **PMO > <*the Program Management Request you want*> > Analyze <*Program Management Request*> Activity.**

   The <*Program Management Request*> Activity page appears.

3. In the <*Program Management Request*> Activity page, complete the fields and click **Apply.**

   The <*Program Management Request*> Activity page reloads, displaying the Activity Analysis chart.



Using Resolution Time Analysis

The Resolution Time Analysis for Program Management displays resolution time in days over a period of time for a category of Program Management requests (issues, resource requests, risks, or scope changes) in line graph form. The numbers for each period (week or month) are averaged, and the average appears in the center of the period as a point.

The chart display can be filtered according to several useful variables:

- Program Name (required)
- Projects
- Resolution Date From/To (required)
- Period

To change the chart display, enter the desired criteria into the proper fields and click **Apply**. The Resolution Time Analysis chart reloads with the new filter criteria applied.

To access the Resolution Time Analysis for a Program Management request:

1. Log on to Mercury IT Governance Center.

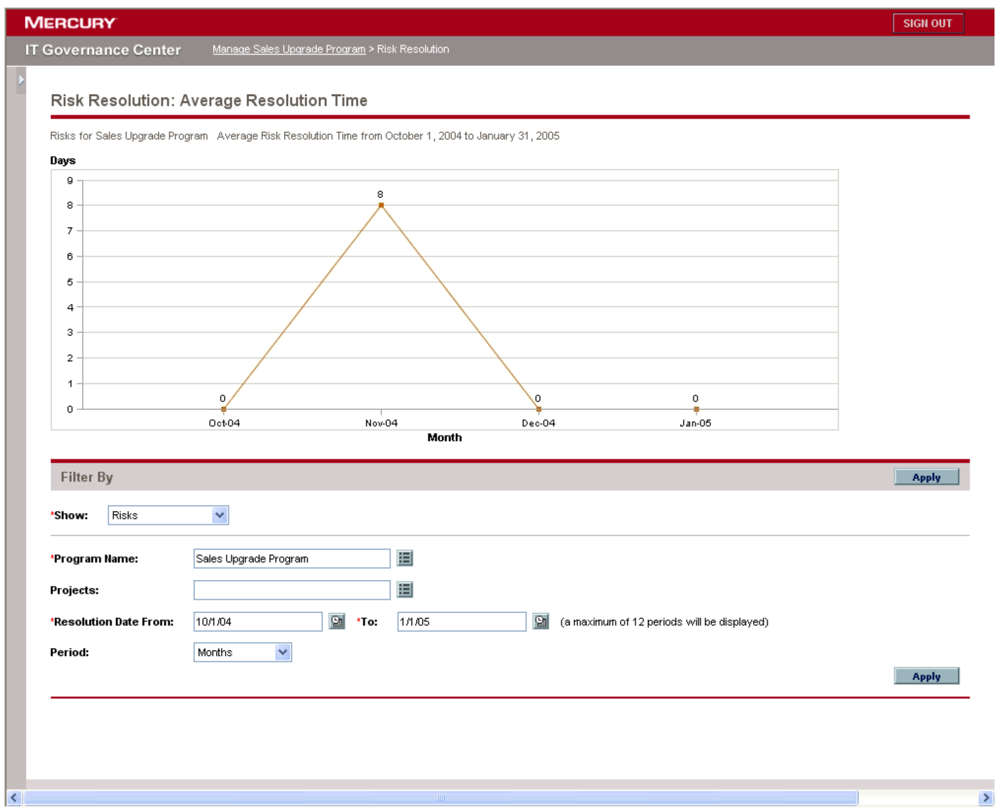
   The standard interface is displayed.

2. From the menu bar, select **PMO > <*the Program Management Request you want*> > Analyze <*Program Management Request*> Resolution Time.**

   The <*Program Management Request*> Resolution page appears.

3. In the <*Program Management Request*> Resolution page, complete the fields and click **Apply.**

   The <*Program Management Request*> Resolution page reloads, displaying the Resolution Time Analysis chart.



Chapter

5

Updating Programs

In This Chapter:

Overview of Updating Programs

During a program's life cycle, many events can occur. Often, this requires changes be made to the program. The following is a list of the ways you can update a program:

- Update a program's priority using the Prioritize Programs page.
- Update a program's general information using the Modify Programs page.
- Update a program's summary condition indicators using the Adjust Program Settings page.
- Update a program's accessibility using the Configure Access Program page.

Updating Program Priorities

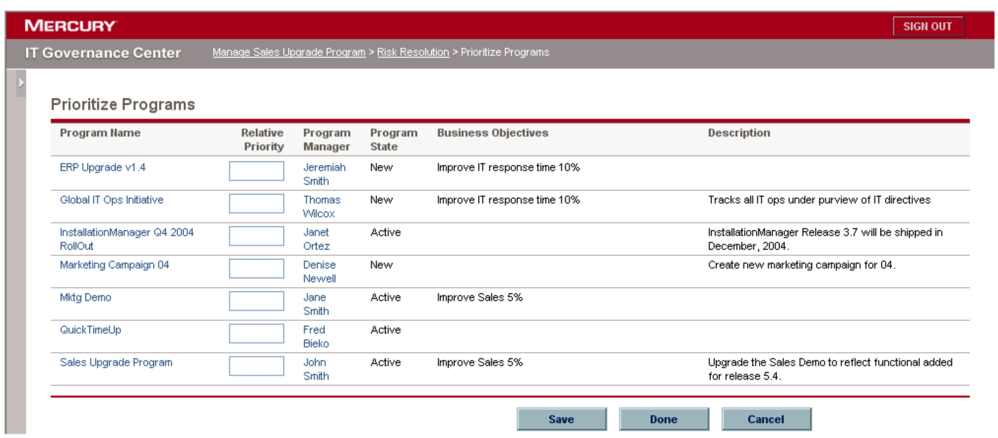
To change a program's relative priority:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **PMO > Manage Program Priority.**

   The Prioritize Programs page appears.



3. In the Prioritize Programs page, enter the program's new priority in the Relative Priority field.

4. In the Prioritize Programs page, click **Done.**

   The change to the program's priority are saved. Click **Save** to save changes and continue to work in the Program Priority page. Click **Cancel** to return to the last Mercury IT Governance Dashboard™ page you visited without saving changes.

Modifying Programs

Existing programs can be modified using the Modify Program page, reached from the Manage Program page.

To modify program information, notes, associated projects, business objectives, or references:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. Open the program's Manage Program page.

   To open the Manage Program page:

   - In the Program List portlet, click on an entry in the Program Name column.

   - Search for a program using the Search for Programs to Manage page. To open the Search for Programs to Manage page:

     a. From the menu bar, select **PMO > Manage Programs.**

        The Search for Programs to Manage page appears.

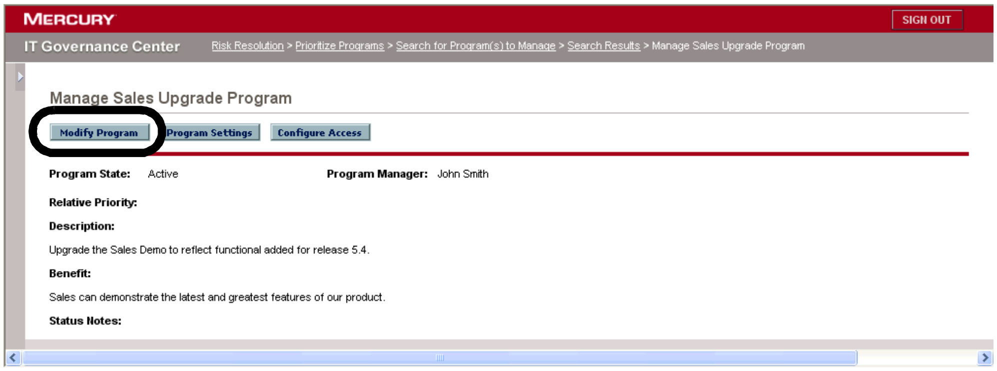
     b. In the Search for Programs to Manage page, complete the search criteria and click **Search.**

        The Program Search Results page appears.

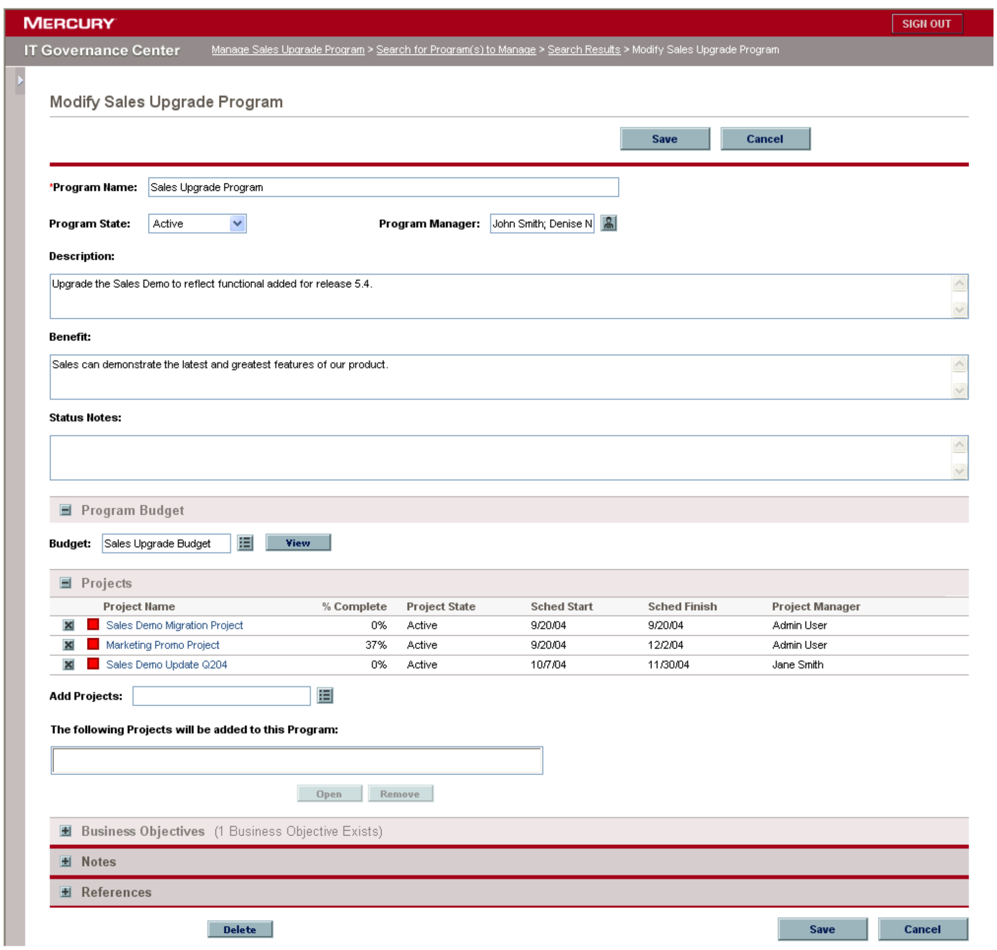
     c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

For additional information, see *Opening Programs in the Manage Program Page* on page 48. The Manage Program page appears.

3. In the Manage Program page, click **Modify Program.**



The Modify Program page appears.



4. In the Modify Program page, make any desired changes.

   The Modify Program page includes the following sections:

   - Program Information
   - Notes
   - Projects
   - Business Objectives
   - References

   See *Step One: Entering Program Information* on page 25 and *Step Two: Attaching Projects and References* on page 28 for more information.

5. In the Modify Program page, click **Save.**

   The changes to the program are saved. The Manage Program page appears.

Deleting Programs

Programs can be deleted using the Modify Program page. To delete a program, you must be allowed to modify programs and you must be listed as the program manager of the program you want to delete.

To delete a program:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. Open the program's Manage Program page.

   To open the Manage Program page:

   - In the Program List portlet, click on an entry in the Program Name column.
   - Search for a program using the Search for Programs to Manage page. To open the Search for Programs to Manage page:

a. From the menu bar, select **PMO > Manage Programs.**

The Search for Programs to Manage page appears.

b. In the Search for Programs to Manage page, complete the search criteria and click **Search.**

The Program Search Results page appears.

c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

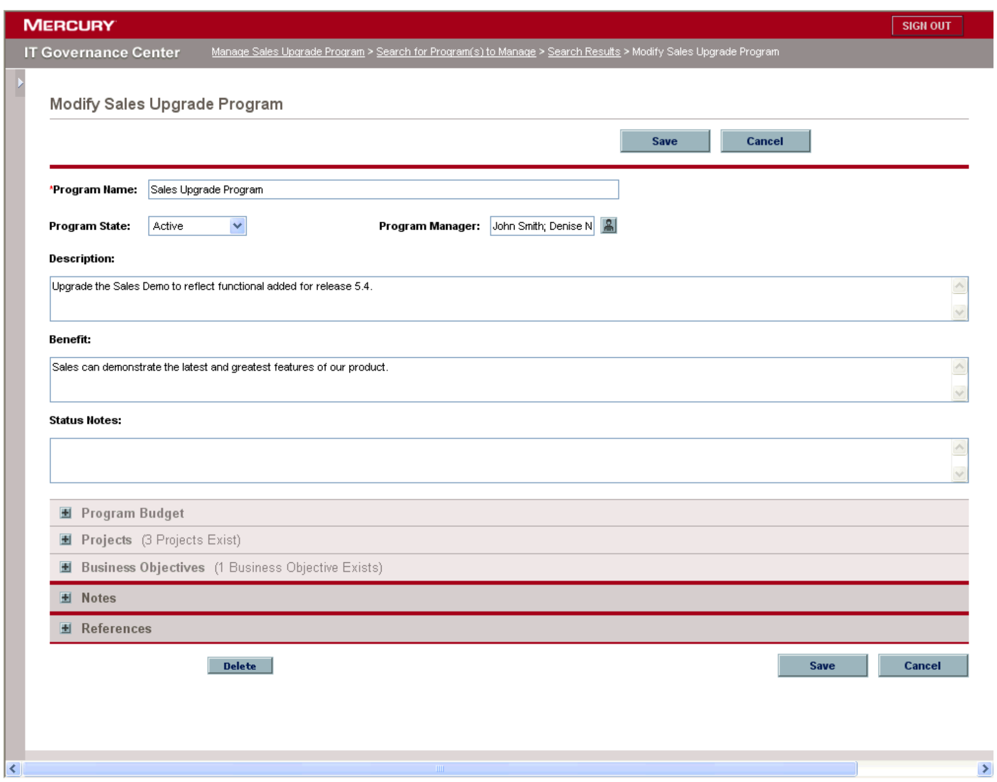
For additional information, see *Opening Programs in the Manage Program Page* on page 48. The Manage Program page appears.

3. In the Manage Program page, click **Modify Program.**

   The Modify Program page appears.

4. In the Modify Program page, click **Delete.**

   A dialog window appears asking you to confirm whether you want to delete the program.



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

   The program is deleted.

Modifying Program Indicators

Program summary condition indicators are typically configured when a program is created. These indicator settings can be changed at any time from the Manage Program page.

To modify a program's summary condition indicator configuration:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. Open the program's Manage Program page.

   To open the Manage Program page:

   - In the Program List portlet, click on an entry in the Program Name column.

   - Search for a program using the Search for Programs to Manage page. To open the Search for Programs to Manage page:

     a. From the menu bar, select **PMO > Manage Programs.**

        The Search for Programs to Manage page appears.

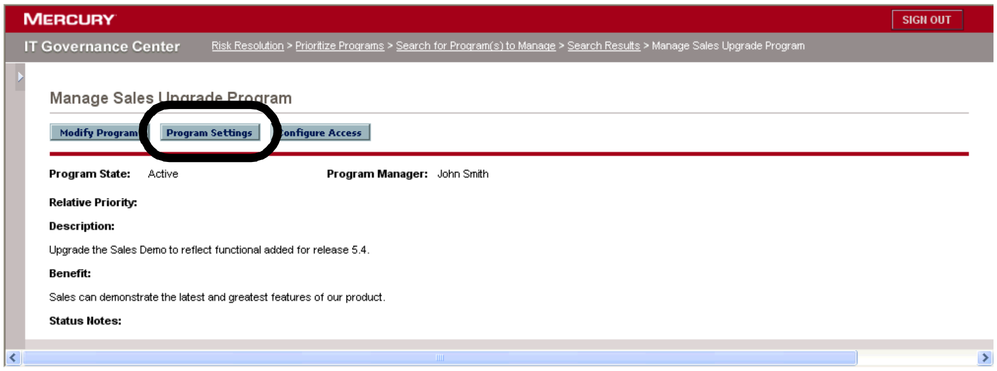
     b. In the Search for Programs to Manage page, complete the search criteria and click **Search.**

        The Program Search Results page appears.

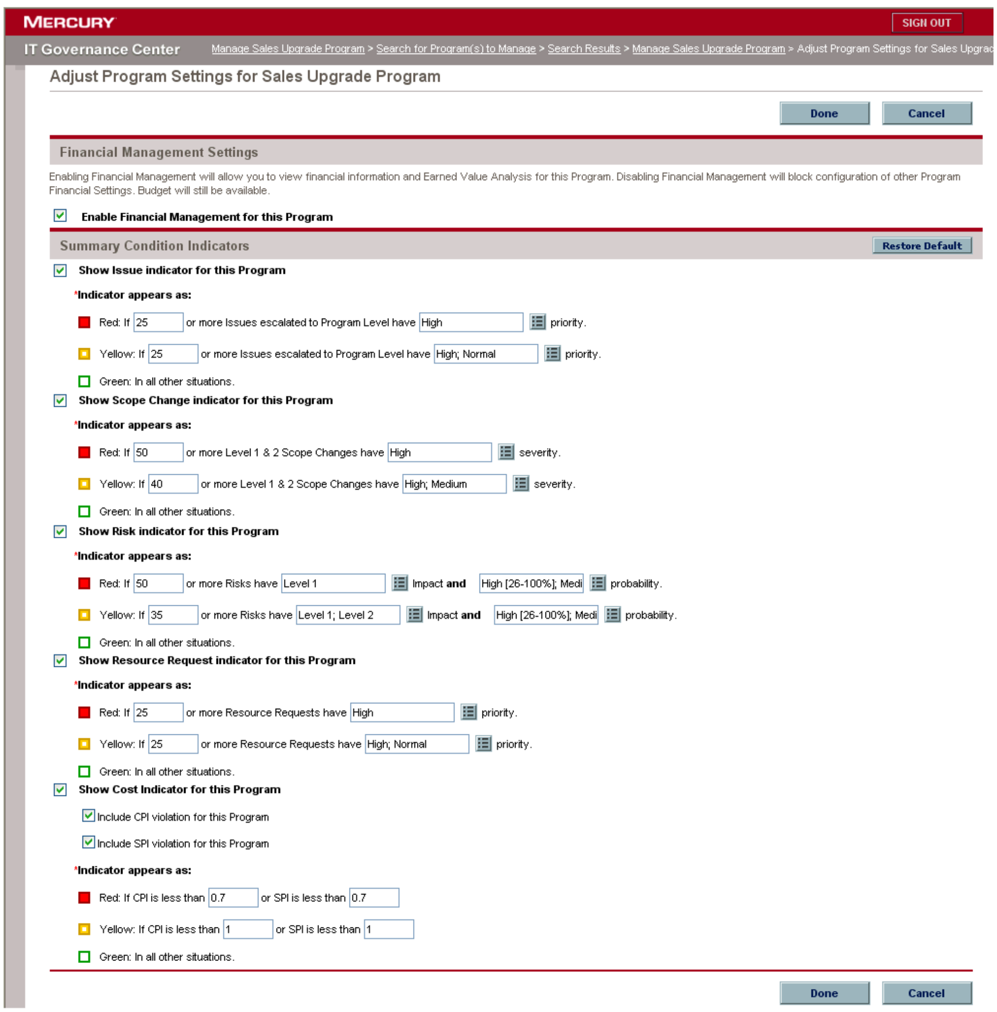
     c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

   For additional information, see *Opening Programs in the Manage Program Page* on page 48. The Manage Program page appears.

3. In the Manage Program page, click **Program Settings.**



The Adjust Program Settings page appears.



4. In the Adjust Program Settings page, make any desired changes to the program's summary condition indicator configurations.

   For more information, see *Step Three: Adjusting Program Settings* on page 30.

5. In the Adjust Program Settings page, click **Done.**

   The changes to the program are saved. The Manage Program page appears.

Modifying Program Access

Access to a program is typically configured when a program is created. The access settings can be changed at any time from the Manage Program page.

To modify a program's access configuration:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. Open the program's Manage Program page.

   To open the Manage Program page:

   - In the Program List portlet, click on an entry in the Program Name column.
   - Search for a program using the Search for Programs to Manage page. To open the Search for Programs to Manage page:

     a. From the menu bar, select **PMO > Manage Programs.**

        The Search for Programs to Manage page appears.

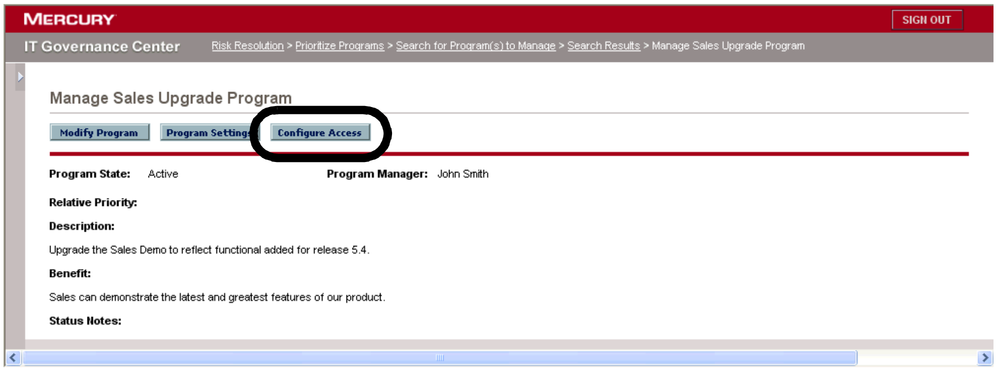
     b. In the Search for Programs to Manage page, complete the search criteria and click **Search.**

        The Program Search Results page appears.

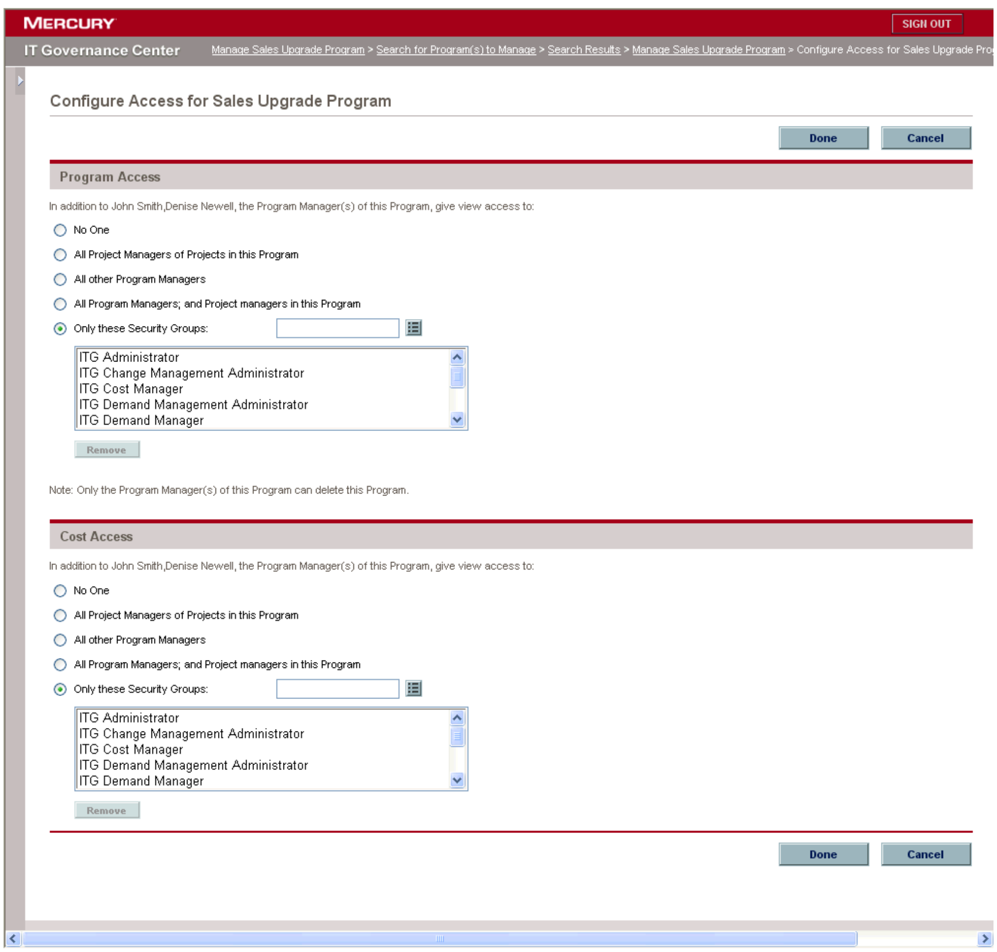
     c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

For additional information, see *Opening Programs in the Manage Program Page* on page 48. The Manage Program page appears.

3. In the Manage Program page, click **Configure Access.**



The Configure Access Program page appears.



4. In the Configure Access Program page, make any desired changes to the program's user access configurations.

   For additional information, see *Step Four: Configuring Access* on page 34.

5. In the Configure Access Program page, click **Done.**

   The changes to the program's access are saved. The Manage Program page appears.

Chapter

6

Submitting Requests that Affect Programs

In This Chapter:

Submitting Requests that Affect Programs

During the life of a program, concerns can surface that need to be dealt with. Mercury IT Governance Center provides a framework for such concerns to be identified and resolved in the form of requests. Requests can be submitted, tracked, rejected, completed, and reported on.

Mercury Program Management includes the following request types that can affect programs:

- **Issue.** Issues introduce a framework for all project and program-related issues to be identified and resolved. Issues can span multiple request types, enabling a finer level of visibility over the resolution process.

  For example, bugs and enhancements can both be issues. Each request type will be processed along its own workflow, though they may share common fields for tracking purposes.

- **Resource Request.** Resource requests allow a program manager to more easily and quickly request and approve resources, as well as maintain visibility over resource needs and allocations.

- **Risk.** Risks supply a way to log and resolve threats to a program. The process of gathering information about possible risks, including impacts and probability of occurring, is streamlined. Program summary condition indicators can be configured to alert users to varying levels of risk.

  For example, the program manager at Company A configures the Customer Service upgrade program to show a red indicator if more than two risks that have an impact level of **1** and probability factor of **High** are created.

- **Scope Change.** Scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. Submitted scope change requests can be assessed before being rejected or incorporated into program or project scope. Program and project scope can be controlled by ensuring that possible changes are clearly identified, aligned, and processed.

Submitting Issues

During the life cycle of a program, some problem or business decision may occur that necessitates being added to the program's issues. These changes can be brought up, processed, and decided upon in the form of issues. The Program Management Issues request type is a way to identify these issues, collect key information about them (impact level and probability of occurring), and deal with them in a timely manner.

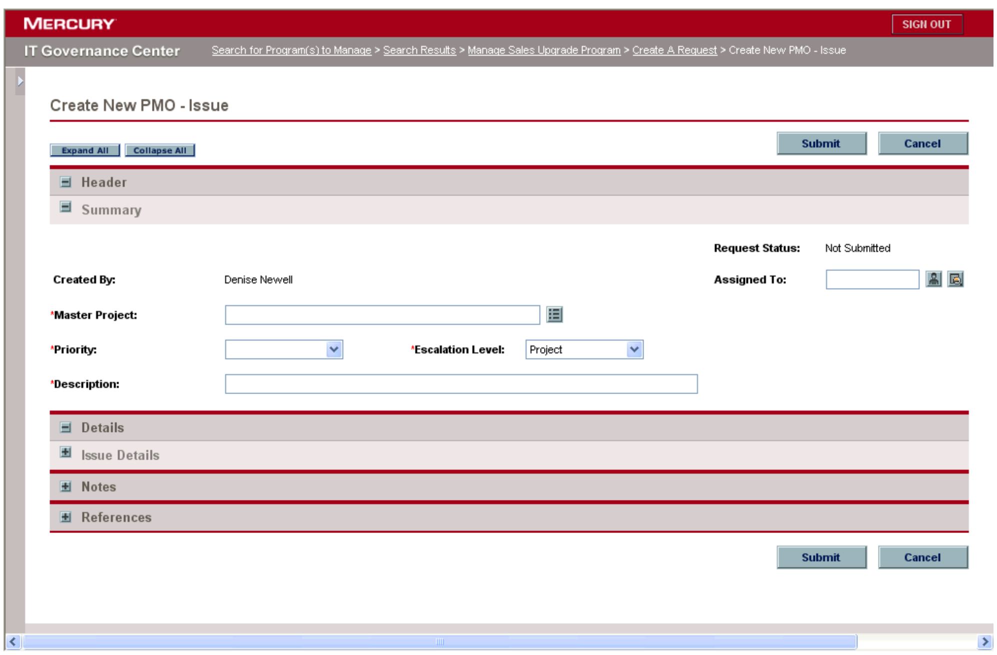
To submit issues:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **Create > Project Issue.**

   From the menu bar, you can also select **PMO > Issues > Submit a Project Issue.** The Request Creation page appears with the Issue request type loaded.



3. In the Request Creation page, complete the fields and click **Submit.**

   The issue begins moving along its pre-defined workflow toward resolution. In order for issues to show up in Program Management portlets, the request must be referenced to a project associated with a program or attached directly as a reference to the program.

Requesting Resources

During the life of a program, projects attached to the program might complete early, or require more resources to complete their projects on time. When projects do require more resources, the project manager can request additional resources from the program using the PMO Request Resources request type.

The Program Management Request Resources request type is a way a program manager can identify these resource requests, collect key information about them (impact level and probability of occurring), and deal with them in a timely manner.

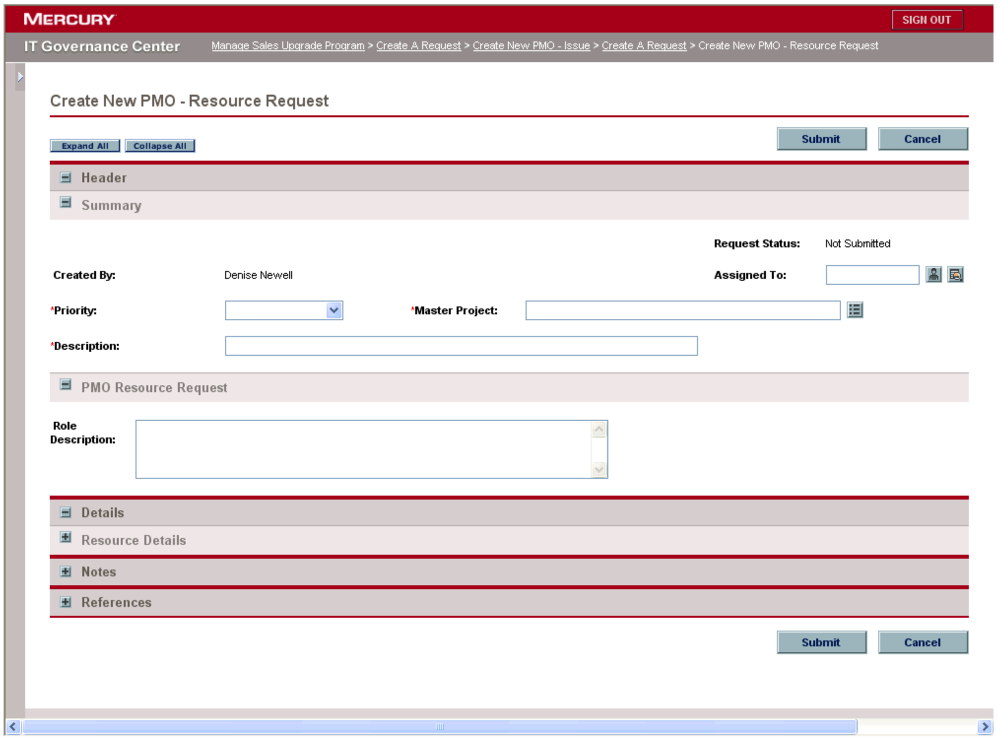
To submit resource requests:

1. Log on to the Mercury IT Governance Center.

   The standard interface is displayed.

2. From the menu bar, select **Create > Project Resource Request.**

   From the menu bar, you can also select **PMO > Resource Requests > Request a Project Resource.** The Request Creation page appears with the resource request request type loaded.



3. In the Request Creation page, complete the fields and click **Submit.**

   The resource request begins moving along its pre-defined workflow toward resolution. In order for resource requests to show up in Program Management portlets, the request must be referenced to a project associated with a program or attached directly as a reference to the program.

Submitting Risks

Risks to a program might be identified during its life cycle. The Program Management Risk request type is a way to identify these risks, collect key information about them (impact level and probability of occurring), and deal with them in a timely manner.

To submit a risk:

1. Log on to the Mercury IT Governance Center.

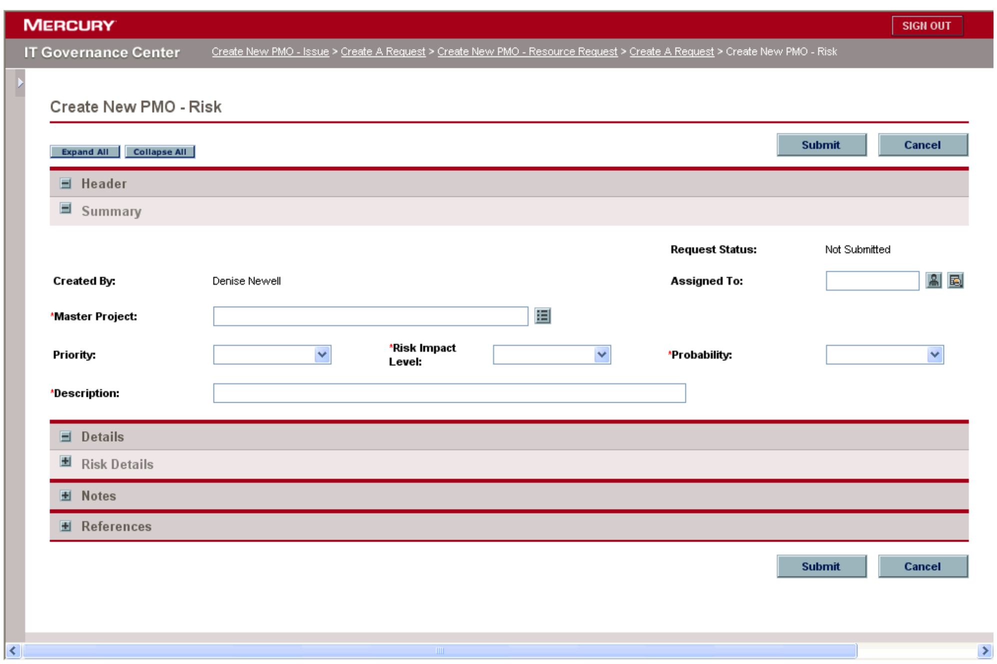
   The standard interface is displayed.

2. From the menu bar, select **Create > Project Risk.**

   From the menu bar, you can also select **PMO > Risks > Submit a Project Risk.** The Request Creation page appears with the Risk request type loaded.

3. In the Request Creation page, complete the fields and click **Submit.**

   The resource request begins moving along its pre-defined workflow toward resolution. In order for resource requests to show up in Program Management portlets, the request must be referenced to a project associated with a program or attached directly as a reference to the program.



Submitting Scope Changes

During the life cycle of a program, some problem or business decision may occur that necessitates a change in the program's scope. These changes can be brought up, processed, and decided upon in the form of Program Management Scope Change request types.

To submit a scope change:

1. Log on to the Mercury IT Governance Center.

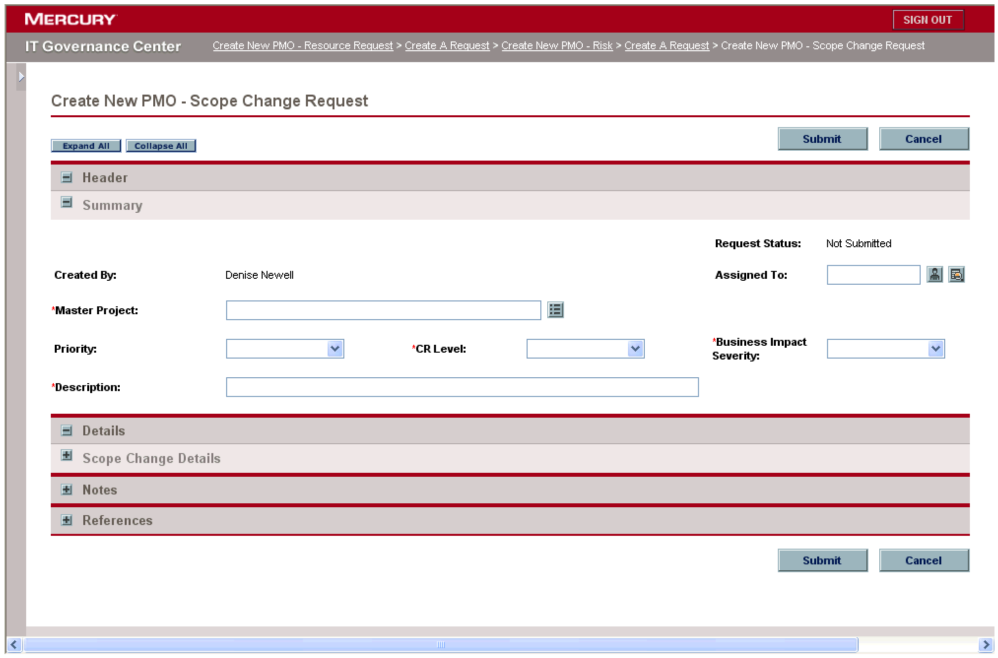
   The standard interface is displayed.

2. From the menu bar, select **Create > Project Scope Change.**

   From the menu bar, you can also select **PMO > Scope Changes > Request a Project Scope Change.** The Request Creation page appears with the Scope Change request type loaded.

3. In the Request Creation page, complete the fields and click **Submit.**

   The scope change begins moving along its pre-defined workflow toward resolution. In order for resource requests to show up in Program Management portlets, the request must be referenced to a project associated with a program or attached directly as a reference to the program.


MERCURY
SIGN OUT
IT Governance Center
Create New PMO - Resource Request > Create A Request > Create New PMO - Risk > Create A Request > Create New PMO - Scope Change Request
Create New PMO - Scope Change Request
Expand All
Collapse All
Submit
Cancel
Header
Summary
Request Status:
Not Submitted
Created By:
Denise Newell
Assigned To:
*Master Project:
Priority:
*CR Level:
*Business Impact Severity:
*Description:
Details
Scope Change Details
Notes
References
Submit
Cancel

Appendix A
Program Management Portlets

There is one Program Management portlet. However, a program manager might want to include Project Management portlets and Resource Management portlets on a Dashboard page. *Table A-1* lists the Program Management portlet. *Table A-2* on page 92 and *Table A-3* on page 93 list the Project Management and Resource Management portlets.

Table A-1. Program Management portlets

Program Management Portlets	Description
Program List	Displays general information and summary conditions for programs.

Table A-2. Projects portlets

Projects Portlets	Description
My Tasks	Lists all project tasks currently assigned to you and having a scheduled finish date two weeks from the current date.
Program Project List	Lists the projects within a program. The default parameters show all project items for the program. Project items are sorted by the project hierarchy and optionally, by: • Name • Resource • State • Scheduled finish • Project hierarchy
Project Gantt	Gantt chart for all projects, tasks, and milestones.
Project List	Lists general information about projects, such as how close they are to completion and their scheduled finish date. Information displayed can be based on project name or other project related criteria.
Project Summary Pie Chart	Pie chart summary of projects grouped by their summary condition. Filter the data by a set of specific projects and subprojects, or filter by department and/or project manager.
Resource Gantt	Gantt chart for resources showing work items including: • Requests • Tasks • Milestones • Staffing Profiles

Table A-3. Resource Management portlets

Resource Management Portlets	Description
Analyze Assignment Load	Compares capacity [(resource calendars) X (resource workload capacity)] to assignments, such as requests, and staffing profiles marked “treat as assignments.” Use to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Compares capacity (active resource pools) to load (lines on active staffing profiles drawing from these resource pools). Used to assess planned load on resource pools, in support of strategic resource planning.
Compare Project and Staffing Profile	Compares a project to the staffing profile. Compares capacity (as the set of active staffing profiles for a project) to assignments within the project. Monitors compliance of the project plan and actuals to the agreed staffing levels for the project.
Current Resource Load by Organization	Displays the current resource load by organization. Organization unit or skill name is a link to the related detail page. To support breakdowns, sort the list by the organization hierarchy structure.
Current Resource Load By Skill	Displays the current resource load by skills. Shows a snapshot of current load on a set of resources, broken down by the skill required by the work item. When a skill is not specified during, it will default to the resource’s primary skill.
Resource Pool List	Lists information regarding resource pools.
Staffing Profile List	Lists staffing profiles. Filter to display a specific staffing profile.

Appendix B
Reports by Category

In This Appendix:

Overview of Report Categories

Reports available through the Mercury IT Governance Center standard interface are listed (by category) and described in the following sections.

> **Note**
> Another type of report in Mercury IT Governance Center (not discussed in this document) are server reports, which are submitted and viewed from the Workbench interface, For information about server reports, see the *System Administration Guide and Reference*.

Administrative Reports

The administrative reports (listed in *Table B-1*) are available to users with an administration license.

Table B-1. Administrative reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management™ contacts are properly defined. This report is also in the Resource category.
Environment Comparison	Helps audit environment definitions when different environments (for example, development and production) are similar to each other.
Environment Detail	Lists the detailed definitions of a given environment or group of environments, the major attributes of the environments, and the attributes of applications tied to the environments.
Environment Group Detail	Contains detailed information about specified environment groups.
Import Requests	Imports requests into Demand Management request tables, moves the requests to the appropriate status, and reports on the results of the execution. For more information about this report, see the *Open Interface Guide and Reference*.

Table B-1. Administrative reports [continued]

Report	Definition
Import Users	Imports data from the user interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Lookup Types	Provides information about one or more lookups.
Notification History	Provides information about notifications that have been sent or are pending.
Object Type Detail	Lists all parameters and commands associated with a given object type.
Portlet Detail	Provides information about a portlet or range of portlets.
RCS Check In	Template of a report used to check files into the RCS repository (if the RCS file management system is being used).
RCS Check Out	Template of a report used to check files out of the RCS repository (if the RCS file management system is being used).
Report Type Detail	Provides information about report type definitions.
Request Header Type Detail	Lists detailed definitional information for request header types.
Request Type Detail	Lists detailed definitional information for request types.
Run Field Security Denormalization	Runs field level security-related denormalization tasks for particular entities.
Run ITG Organization Unit Interface	Imports data from the organization unit interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Run ITG Package Interface	Validates and loads package data from the package open interface tables into the standard Mercury Change Management™ data model. For more information about this report, see the *Open Interface Guide and Reference*.
Run Workflow Transaction Interface	Validates and runs workflow transactions based on data in the workflow open interface tables. For more information about this report, see the *Open Interface Guide and Reference*.
Security Group Detail	Lists definitional information for one or more security groups.

Table B-1. Administrative reports [continued]

Report	Definition
Special Command Detail	Provides details for a command (special command) or a range of commands.
Synchronize Meta Layer	Assesses or synchronizes the RML (Reporting Meta Layer).
User Data Detail	Displays the definition of custom user data field (for example, fields on entities like packages, requests, workflows, and security groups).
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is also in the Resource category.
Validations	Provides information about the various custom validations that have been entered into the system as well as those that are standard with Mercury IT Governance Center products.
Workflow Detail	Provides detailed definitional information about specific workflows or sets of workflows.
Workflow Statistics	Given a date range and a workflow (or a range of workflows), this report provides statistical information regarding workflow usage.

For More Information

Unless otherwise indicated in *Table B-1*, see the *Reports Guide and Reference* for more information about Administrative reports.

Change Management Reports

The Change Management reports (listed in *Table B-2*) are available to users with a Mercury Change Management™ application license.

Table B-2. Change Management reports

Report	Definition
Compare Custom Database Setup	Runs custom database comparisons.
Compare Filesystem Environment	Compares the files and file structures of two machines.
Compare MS SQL Server 7 Environments	Compares the data model of two SQL Server Version 7 databases.
Compare Oracle Environments	Compares the data model of two Oracle schemas.
Distribution Detail	Lists the contents and results of a distribution.
Environment Comparison by Objects Migrated	Given two environments, this report looks at the history of all the objects migrated into each environment (using Mercury Change Management) and lists any differences.
Environments/Objects Detail	Lists objects that have been migrated into a given environment or set of environments.
Object History	Provides a workflow step transaction history for packages.
Objects/Environments Detail	Lists objects that have been migrated into a given environment or a set of environments.
Package Details	Returns details about a given package.
Package History	Lists the complete workflow history of a given package.
Package Impact Analysis	Lists three separate sections for analysis: • Other packages that contain common objects with a given package • Objects that have migrated alongside one or more of the objects being migrated on the given package but are not included in the given package • Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed
Packages Pending	Lists: • Open packages with pending activity • Details about each package • Pending work for a group of users

Table B-2. Change Management reports [continued]

Report	Definition
Release Detail	Lists requests, packages and distributions associated with a release.
Release Notes	Shows all of the requests and packages in a release as well as their associations.

For More Information

For more information about Change Management reports, see the *Reports Guide and Reference*.

Demand Management Reports

The Demand Management reports (listed in *Table B-3*) are available to users with a Mercury Demand Management application license.

Table B-3. Demand Management reports

Report	Definition
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
DEM Demand Creation History	Shows the history of demand creation for a specified demand set.
DEM Historical SLA Violation	Shown the history of SLA violations for a specified demand set.
DEM Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using a number of selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered by values in custom fields.
Request History	Lists the complete workflow and field change history for each selected request.
Request Quick View	Lists a quick summary of open and closed requests, breaking down the requests by priority.
Request Summary	Displays the total counts for groups of requests matching the selection criteria.
Request Summary (Filter by Custom Fields)	Similar to the Request Summary report except that requests can be filtered by values in custom fields.
Resource Load by Priority	Lists all open requests assigned to different users. This report is also in the Resource category.

For More Information

For more information about Demand Management reports, see the *Reports Guide and Reference*.

Financial Management Reports

The Financial Management reports (listed in *Table B-4*) are available to users with a Mercury Time Management™ application license.

Table B-4. Financial Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping. This report is also in the Time Management category.
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. This report is also in the Project Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Project Management category.

For More Information

For more information about Financial Management reports, see the *Reports Guide and Referenc*e.

Portfolio Management Reports

The Portfolio Management reports are available to users with a Mercury Portfolio Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Program Management Reports

The Program Management reports are available to users with a Mercury Program Management application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Project Management Reports

The Project Management reports (listed in *Table B-5*) are available to users with a Mercury Project Management™ application license.

Table B-5. Project Management reports

Report	Definition
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. Totals include both labor and non-labor costs. This report is also in the Financial Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Financial Management category.
Project Critical Path	Displays the tasks that are on a project's critical path.
Project Custom Detail	Generated in HTML table format, showing only the columns that are selected from the header fields and custom fields based on the selected project.
Project Detail	Queries projects by their header fields.
Project Detail (Filter by Custom Fields)	Queries projects by their header fields. You can filter the query using the project's custom fields.
Project Exception Detail	Lists task details for tasks that have violated user-defined exception rules.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. This report is also in the Resource category.
Project Schedule Change	Compares a project plan with a baseline, or a baseline to another baseline.
Project Status Detail	Summarizes project statuses of selected projects and tasks.
Project Summary	Displays all projects that meet the criteria selected in the header fields.
Project Task Assignment	Shows assignment information for a user or a group of users. This report is also in the Resource category.
Project Template Detail	Lists the parameters and parameter details for project templates.

For More Information

For more information about Project Management reports, see the *Reports Guide and Reference*.

Resource Management Reports

The Resource Management reports (listed in *Table B-6*) are available to users with the licenses indicated in the definition column in the table.

Table B-6. Resource Management reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. Available to users with an administration license. This report is also in the Administrative category.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. Available to users with a Mercury Project Management license.
Project Task Assignment	Shows assignment information for a user or a group of users. Available to users with a Mercury Project Management license.
Resource Load by Priority	Lists open requests assigned to different users. Available to users with a Mercury Demand Management license.
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is available to users with any application license. This report is also in the Administration category.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. Available to users with a Mercury Time Management application license. This report is also in the Time Management category.

For More Information

For more information about Resource Management reports, see the *Reports Guide and Reference*.

Time Management Reports

The Time Management reports (listed in *Table B-7*) are available to users with a Mercury Time Management application license.

Table B-7. Time Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping.
Actual Time Summary	Summarizes actual time information entered in non-cancelled time sheets.
Time Sheet Details	Summarizes multiple time sheets displays their details.
Time Sheet Summary	Summarizes time information entered in non-cancelled time sheets.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. This report is also in the Resource category.

For More Information

For more information about Time Management reports, see the *Reports Guide and Reference*.

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