



Mercury IT Governance Center™  
**Mercury Program Management™**  
**User's Guide**  
Version: 6.0

**MERCURY™**



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

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

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

Mercury  
379 North Whisman Road  
Mountain View, CA 94043  
Tel: (650) 603-5200  
Toll Free: (800) TEST-911  
Customer Support: (877) TEST-HLP  
Fax: (650) 603-5300

© 1997–2005 Mercury Interactive Corporation. All rights reserved.

If you have any comments or suggestions regarding this document, please send email to [documentation@mercury.com](mailto:documentation@mercury.com).

# Table of Contents

---

<b>List of Figures .....</b>	<b>vii</b>
<b>List of Tables .....</b>	<b>ix</b>
<b>Chapter 1: Introduction.....</b>	<b>11</b>
About This Document.....	12
Who Should Read This Document .....	13
Prerequisite Documents .....	14
Related Documents.....	14
Overview of Program Management .....	15
<b>Chapter 2: Configuring Business Objectives .....</b>	<b>17</b>
Overview of Business Objectives.....	18
Creating Business Objectives .....	18
Editing Business Objectives.....	19
Deleting Business Objectives.....	20
<b>Chapter 3: Creating Programs .....</b>	<b>21</b>
Overview of Creating Programs.....	22
Requesting Programs .....	23
Creating Programs .....	25
Step One: Entering Program Information.....	25
Step Two: Attaching Projects and References.....	28
Step Three: Adjusting Program Settings.....	30
Step Four: Configuring Access .....	34

References.....	38
Adding References, Attachments.....	38
Adding References, Package (Existing) .....	39
Adding References, Package (New).....	39
Adding References, Project.....	40
Adding References, Request (Existing).....	41
Adding References, Request (New) .....	41
Adding References, Task .....	42
Adding References, URL .....	43
<b>Chapter 4: Managing Programs.....</b>	<b>45</b>
Overview of Managing Programs .....	46
Opening Programs in the Manage Program Page .....	48
Using the Program List Portlet.....	48
Searching for Programs to Manage .....	48
Using the Manage Program Page .....	50
Managing Program Projects.....	52
Using the Program Project List Portlet.....	52
Managing Projects Using the Manage Program Page .....	53
Managing Program Costs.....	53
Managing Program Resources .....	55
Managing Resource Pools.....	55
Managing Staffing Profiles .....	57
Managing Program Issues.....	58
Using the Program Issue List Portlet .....	58
Managing Issues Using the Manage Program Page .....	59
Managing Program Scope Changes.....	60
Using the Program Scope Change List Portlet .....	60
Managing Scope Changes Using the Manage Program Page .....	61
Managing Program Risks.....	62
Using the Program Risk List Portlet .....	62
Managing Risks Using the Manage Program Page .....	63
Managing Program Resource Requests.....	64
Using the Resource Assignments Portlet.....	64
Using the Program Resource Request List Portlet .....	65
Managing Resource Requests Using the Manage Program Page .....	66
Analyzing Programs.....	67
Using Activity Analysis.....	67
Using Resolution Time Analysis.....	68
<b>Chapter 5: Updating Programs .....</b>	<b>71</b>
Overview of Updating Programs.....	72

---

Updating Program Priorities.....	72
Modifying Programs .....	73
Deleting Programs.....	75
Modifying Program Indicators.....	77
Modifying Program Access.....	79
<b>Chapter 6: Submitting Requests that Affect Programs .....</b>	<b>83</b>
Submitting Requests that Affect Programs.....	84
Submitting Issues .....	85
Requesting Resources.....	86
Submitting Risks .....	88
Submitting Scope Changes .....	89
<b>Appendix A: Program Management Portlets .....</b>	<b>91</b>
<b>Appendix B: Reports by Category .....</b>	<b>95</b>
Overview of Report Categories.....	96
Administrative Reports .....	96
Change Management Reports.....	99
Demand Management Reports.....	101
Financial Management Reports .....	102
Portfolio Management Reports.....	103
Program Management Reports.....	103
Project Management Reports.....	104
Resource Management Reports.....	106
Time Management Reports.....	108
<b>Index .....</b>	<b>109</b>



## List of Figures

---

Figure 3-1	Process for creating a program.....	23
Figure 3-2	Attach Projects and References page.....	28
Figure 3-3	Adjust Program Settings page.....	32
Figure 3-4	Configure Access page.....	34
Figure 3-5	Add Document page.....	38
Figure 3-6	Add Reference: Package page.....	39
Figure 3-7	Create New Package page.....	39
Figure 3-8	Add Reference Project page.....	40
Figure 3-9	Add Reference Request page.....	41
Figure 3-10	Create New Request page.....	42
Figure 3-11	Add Reference Task page.....	42
Figure 3-12	Reference URL page.....	43
Figure 4-1	Manage Program page.....	47
Figure 4-2	Program List portlet.....	48
Figure 4-3	Manage Program page.....	51
Figure 4-4	Program Project List portlet.....	52
Figure 4-5	Manage Program page, Projects section.....	53
Figure 4-6	Analyze cumulative costs.....	54
Figure 4-7	Manage Program page, Related Actions section.....	55
Figure 4-8	Resource Pool page.....	56
Figure 4-9	Staffing Profile page.....	57
Figure 4-10	Program Issue List portlet.....	58
Figure 4-11	Managing issues.....	59
Figure 4-12	Program Scope Change List portlet.....	60

## List of Figures

---

Figure 4-13	Managing scope changes .....	61
Figure 4-14	Program Risk List portlet.....	62
Figure 4-15	Managing risks .....	63
Figure 4-16	Resource Assignment portlet .....	64
Figure 4-17	Resource Request List portlet.....	65
Figure 4-18	Managing resource requests.....	66



## List of Tables

---

Table A-1	Program Management portlets .....	91
Table A-2	Projects portlets.....	92
Table A-3	Resource Management portlets.....	93
Table B-1	Administrative reports.....	96
Table B-2	Change Management reports.....	99
Table B-3	Demand Management reports .....	101
Table B-4	Financial Management reports.....	102
Table B-5	Project Management reports .....	104
Table B-6	Resource Management reports.....	106
Table B-7	Time Management reports .....	108



# Chapter 1 Introduction

---

## In This Chapter:

- *About This Document*
  - *Who Should Read This Document*
  - *Prerequisite Documents*
  - *Related Documents*
  - *Overview of Program Management*
-

## 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*
  - *Creating Business Objectives*
  - *Editing Business Objectives*
  - *Deleting Business Objectives*
-

## 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.

The screenshot shows the 'New Business Objective' form in the Mercury IT Governance Center. The form includes the following fields and controls:

- Name:** Text input field containing 'Increase Sales Cold Call Success 5%'.
- State:** Dropdown menu set to 'In Progress'.
- Owner:** Text input field containing 'Denise Newell' with a user icon.
- Priority:** Text input field.
- Description:** Text area containing 'Increase Sales Cold Call Success by 5%'.
- Clear Fields:** Button located at the bottom right of the form.
- Done:** Button located at the bottom center of the form.

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.

Name	State	Owner	Priority	Description
<input checked="" type="checkbox"/> Improve IT response time 10%	In Progress	Fredrick Schmidt	3	IT need to improved the response time by 10%.
<input checked="" type="checkbox"/> Improve Sales 5%	In Progress	Luis Chan	1	The Sales Team need to improve gross sales by 5%.
<input checked="" type="checkbox"/> Improve Sales Cold Call Success 5%	In Progress	Jane Smith	2	The In-House Sales Team need to improve their cold call success rate by 5%.
<input checked="" type="checkbox"/> Increase Sales Productivity	In Progress	Jeremiah Smith	1	The sales team need to increase sales productivity by at least 5%.

[Create New Business Objective](#)

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

The Modify Business Objective page appears.

**Modify Improve Sales 5%**

Name:

State:

Owner:

Priority:

Description:

[Clear Fields](#)

[Done](#)

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.

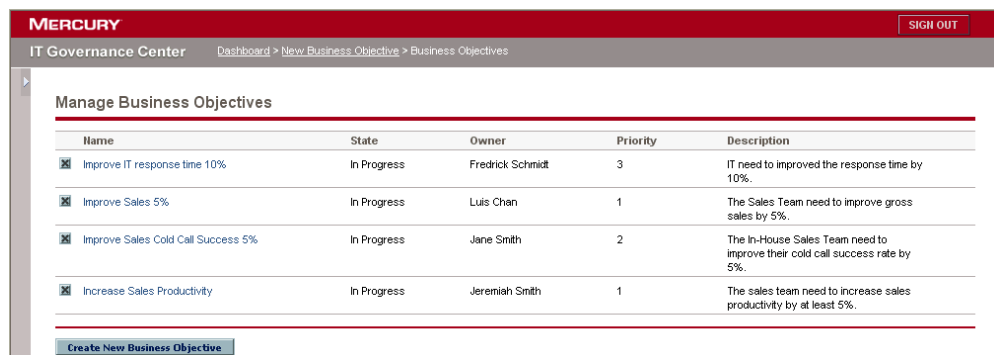
To delete business objectives:

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.



Name	State	Owner	Priority	Description
<input checked="" type="checkbox"/> Improve IT response time 10%	In Progress	Fredrick Schmidt	3	IT need to improved the response time by 10%.
<input checked="" type="checkbox"/> Improve Sales 5%	In Progress	Luis Chan	1	The Sales Team need to improve gross sales by 5%.
<input checked="" type="checkbox"/> Improve Sales Cold Call Success 5%	In Progress	Jane Smith	2	The In-House Sales Team need to improve their cold call success rate by 5%.
<input checked="" type="checkbox"/> Increase Sales Productivity	In Progress	Jeremiah Smith	1	The sales team need to increase sales productivity by at least 5%.

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*
  - *Requesting Programs*
  - *Creating Programs*
    - *Step One: Entering Program Information*
    - *Step Two: Attaching Projects and References*
    - *Step Three: Adjusting Program Settings*
    - *Step Four: Configuring Access*
  - *References*
    - *Adding References, Attachments*
    - *Adding References, Package (Existing)*
    - *Adding References, Package (New)*
    - *Adding References, Project*
    - *Adding References, Request (Existing)*
    - *Adding References, Request (New)*
    - *Adding References, Task*
    - *Adding References, URL*
-

## 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.

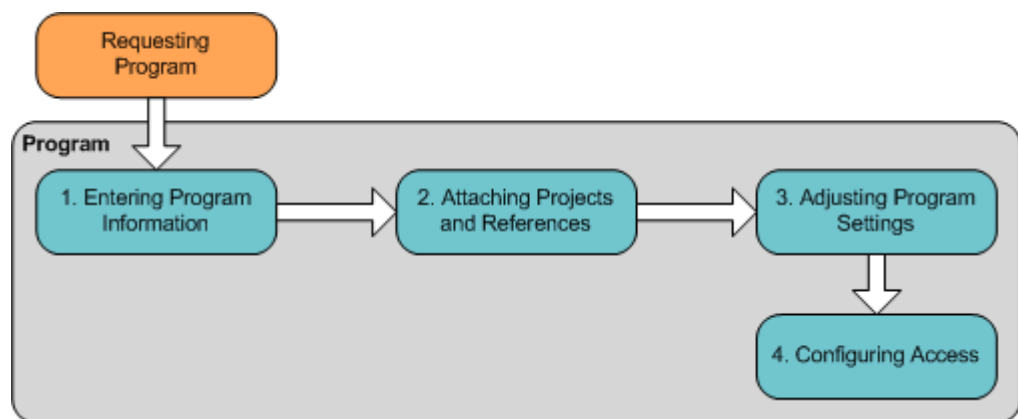


Figure 3-1. Process for creating a program

## 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.

The screenshot shows the 'Create New PMO - Program Request' form in the Mercury IT Governance Center. The breadcrumb trail is: *New Business Objective > Business Objectives > Modify Improve Sales 5% > Create A Request > Create New PMO - Program Request*. The form is divided into several sections:

- Header:** Includes 'Expand All' and 'Collapse All' buttons, and 'Submit' and 'Cancel' buttons.
- Summary:** Contains fields for:
  - Created By:** Denise Newell
  - Department:** (dropdown)
  - Sub-Type:** (dropdown)
  - Workflow:** PMO - Program Request Workflow
  - Priority:** (dropdown)
  - Application:** (dropdown)
  - Assigned To:** (dropdown)
  - Assigned Group:** (dropdown)
  - Request Group:** (dropdown)
  - Description:** (text area)
  - Request Status:** Unreleased
  - Contact Name:** (dropdown)
  - Contact Phone:** (text field)
  - Contact Email:** (text field)
- Details:** Contains fields for:
  - Program Name:** (text field)
  - Target Implementation Date:** (text field)
  - Detailed Description:** (text area)
  - Business Objectives:** (text area)
  - Program Benefit:** (text area)
  - Budget Estimate (\$):** (text field)
  - Est. Effort for Analysis:** (text field)
  - Requestor Location:** (dropdown)
- Additional Sections:** A list of expandable sections: Contact Information, Evaluation, Detailed Analysis, Schedule Details, Notes, and References.

'Submit' and 'Cancel' buttons are located at the bottom right of the form.



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.

**MERCURY** SIGN OUT

IT Governance Center Business Objectives > Modify Improve Sales 5% > Create A Request > Create New PMO - Program Request > Create Program

---

**Program Creation: Enter Program Information**

1. Enter Program Information ▶ 2. Attach Projects and References ▶ 3. Adjust Program Settings ▶ 4. Configure Access

**Program Name:**

---

**Program Information**

**Program Manager:**

**Description:**

**Benefit:**

**Status Notes:**

---

**Program Budget**

**Budget:**

---

**Business Objectives**

**Add Business Objectives:**

The following Business Objs will be added to this program:

---

**Notes**

**New Note:**

---

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 <b>Remove</b> .
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*.

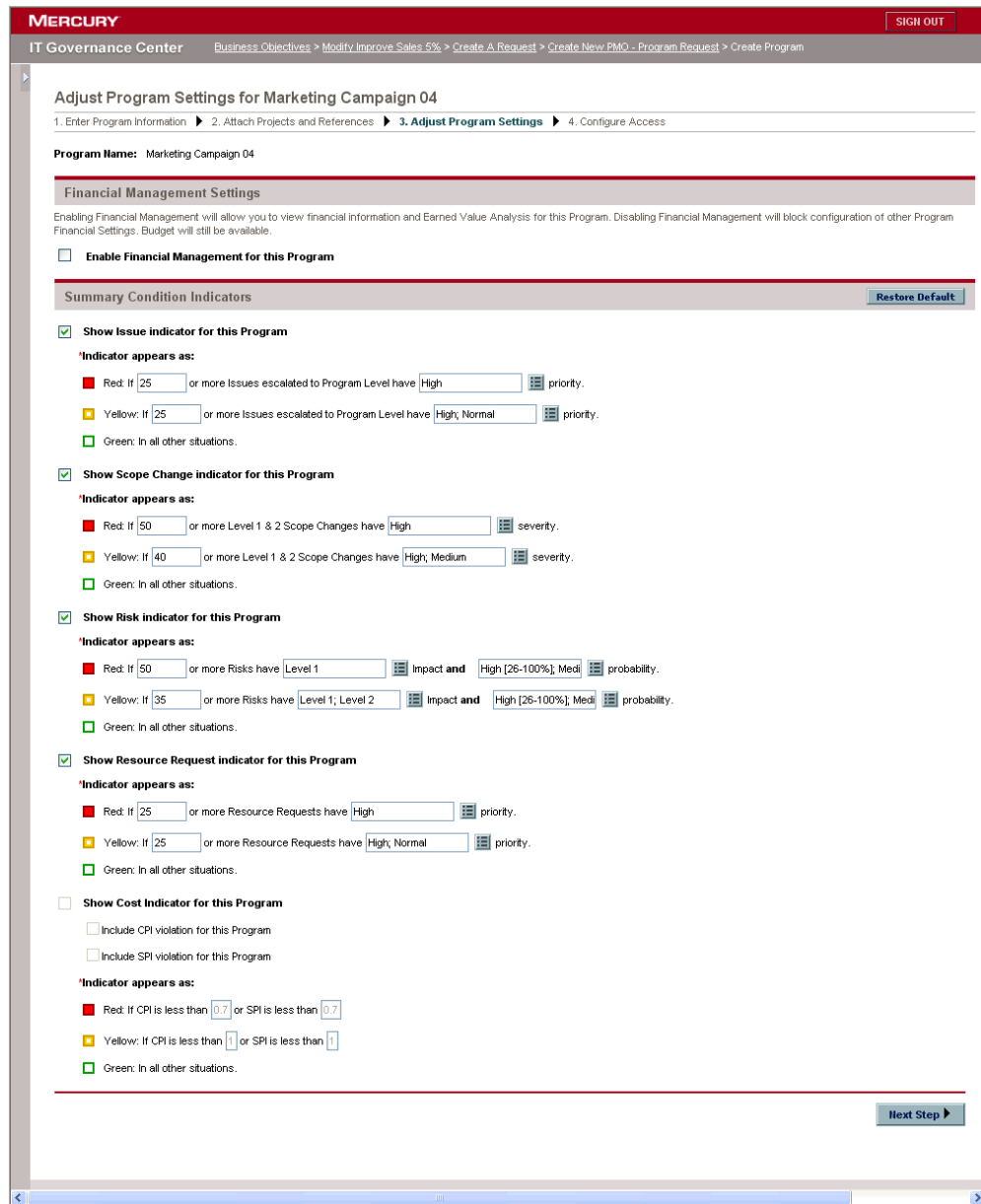


Figure 3-3. Adjust Program Settings page

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:

Show Scope Change indicator for this Program

**\*Indicator appears as:**

Red: If  or more Level 1 & 2 Scope Changes have  severity.

Yellow: If  or more Level 1 & 2 Scope Changes have  severity.

Green: In all other situations.

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.

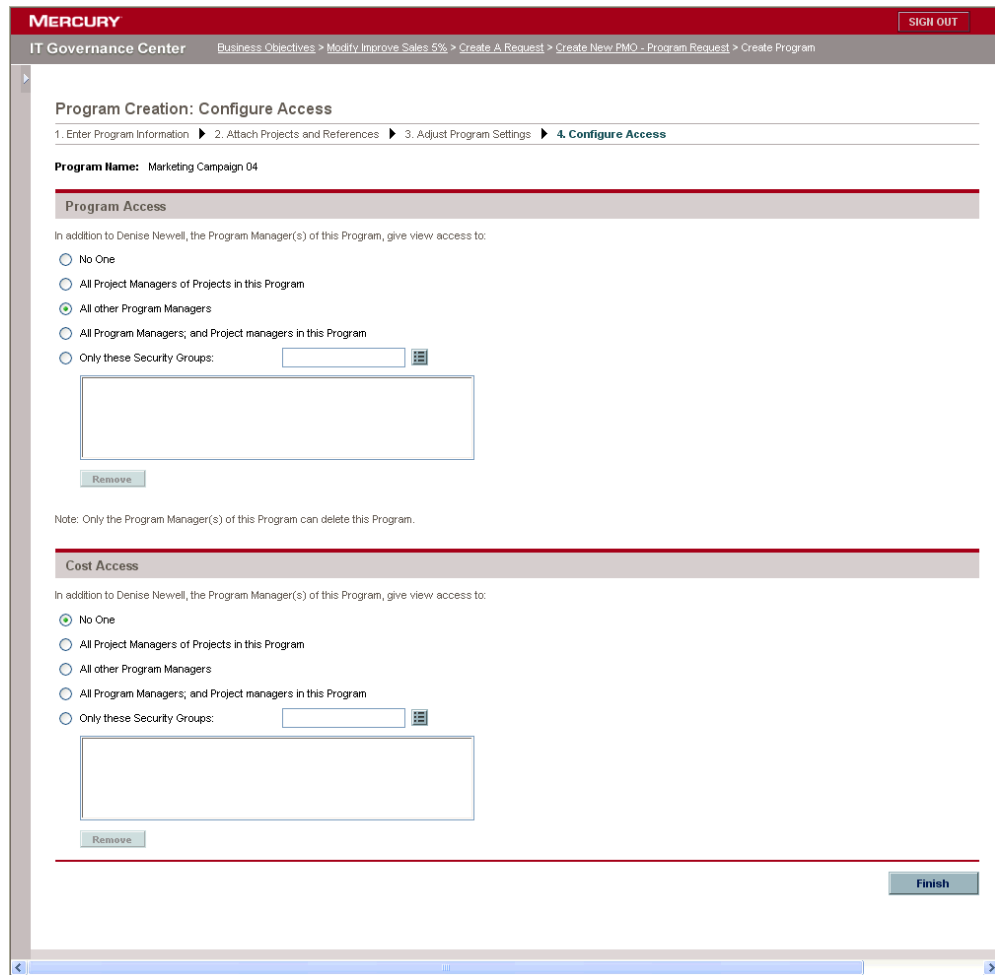


Figure 3-4. Configure Access page

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

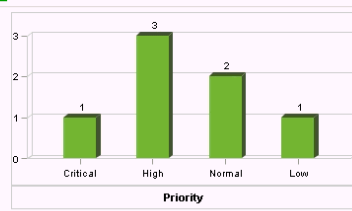
Projects

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

---

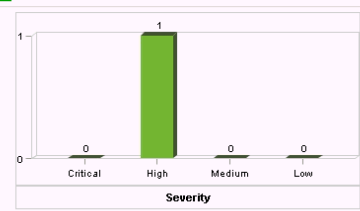
Issues, Scope Changes, Risks, Resource Requests

Issues (Program Level) - Total = 7



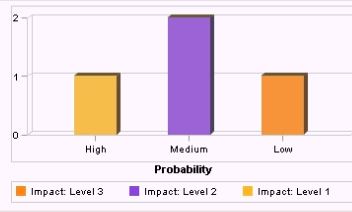
Priority	Count
Critical	1
High	3
Normal	2
Low	1

Scope Changes (Level 1 and 2) - Total = 1



Severity	Count
Critical	0
High	1
Medium	0
Low	0

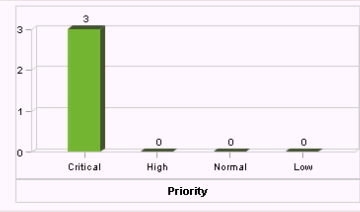
Risks - Total = 4



Probability	Count
High	1
Medium	2
Low	1

■ Impact: Level 3    ■ Impact: Level 2    ■ Impact: Level 1

Resource Requests - Total = 3



Priority	Count
Critical	3
High	0
Normal	0
Low	0

---

Business Objectives (1 Business Objective Exists)

---

Notes

---

References

---

Related Actions

[View Staffing Profiles for this Program.](#)  
[View Resource Pools for this Program.](#)

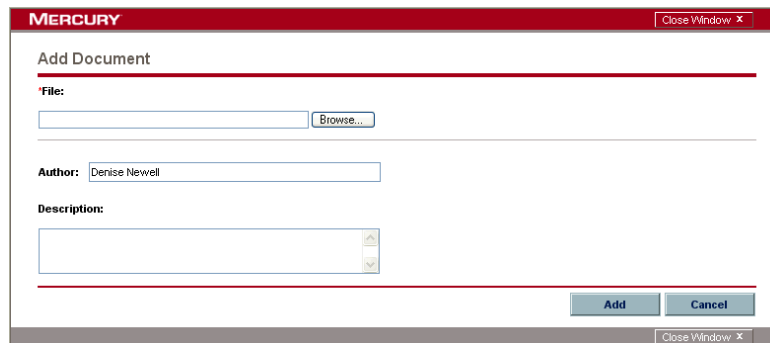
Creating Programs 37

## 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](#)).



The screenshot shows a web application window titled "MERCURY" with a "Close Window" button in the top right corner. The main content area is titled "Add Document" and contains the following fields and controls:

- A "File:" label followed by a text input field and a "Browse..." button.
- An "Author:" label followed by a text input field containing the text "Denise Newell".
- A "Description:" label followed by a text area with up and down scroll arrows.
- At the bottom right, there are two buttons: "Add" and "Cancel".
- At the bottom right corner of the window, there is another "Close Window" button.

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**.

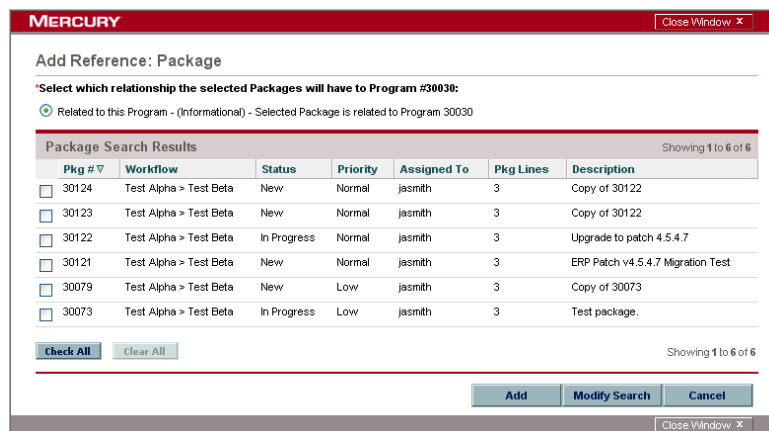


Figure 3-6. Add Reference: Package page

## 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**.

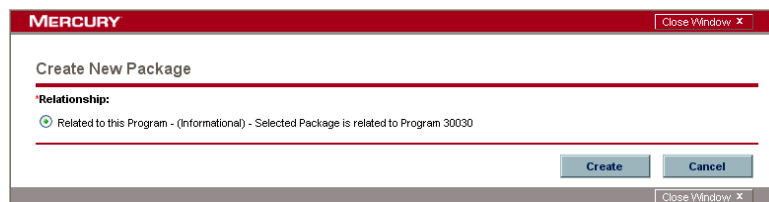


Figure 3-7. Create New Package page

## 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**.

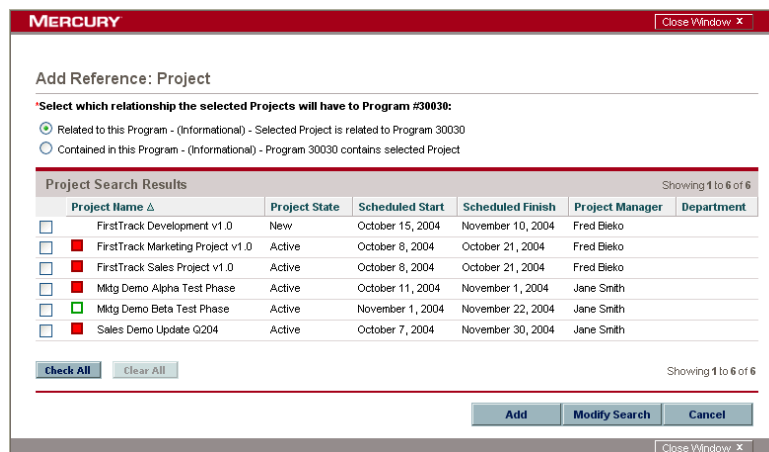


Figure 3-8. Add Reference Project page



## 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**.

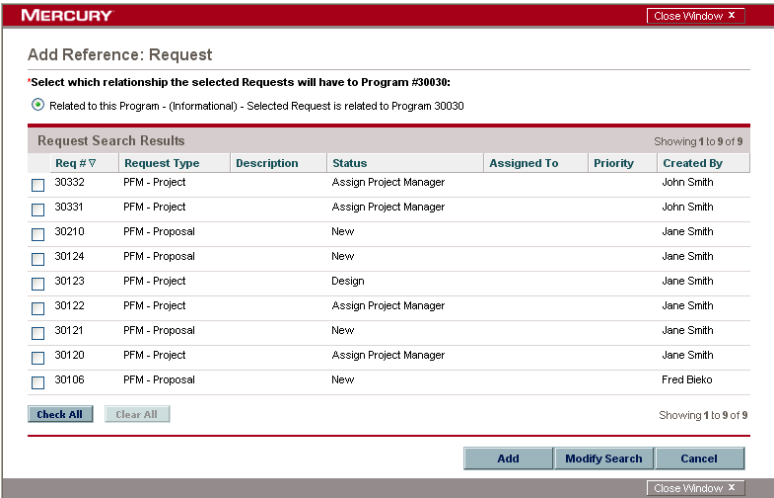


Figure 3-9. Add Reference Request page

## 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**.

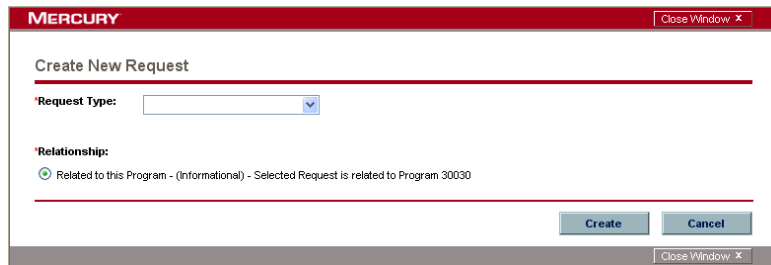


Figure 3-10. Create New Request page

## 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**.

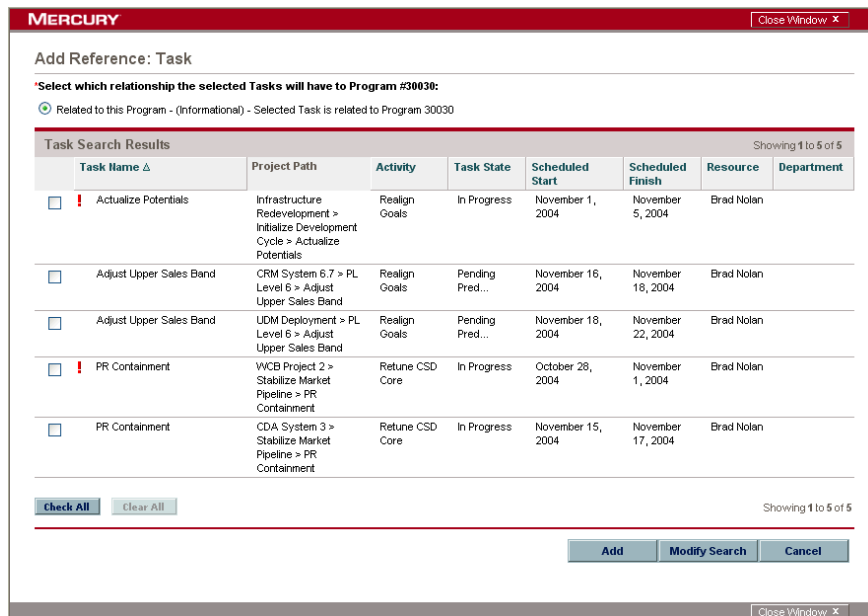
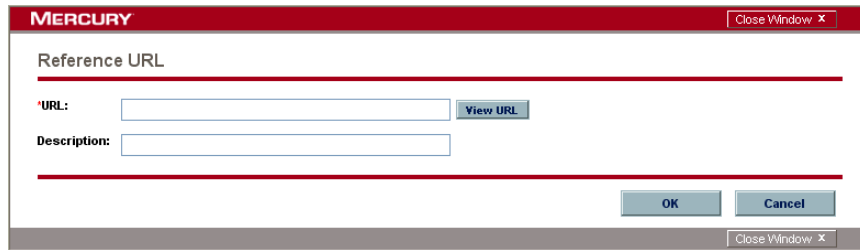


Figure 3-11. Add Reference Task page

## 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](#)).



The screenshot shows a window titled "MERCURY" with a "Close Window" button in the top right corner. The window content is titled "Reference URL" and is separated from the rest of the window by a red horizontal line. Below this line, there are two input fields: "URL:" and "Description:". The "URL:" field has a "View URL" button to its right. Below the "Description:" field, there are two buttons: "OK" and "Cancel". At the bottom right of the window, there is another "Close Window" button.

Figure 3-12. Reference URL page



# Chapter 4 Managing Programs

---

## In This Chapter:

- *Overview of Managing Programs*
- *Opening Programs in the Manage Program Page*
  - *Using the Program List Portlet*
  - *Searching for Programs to Manage*
- *Using the Manage Program Page*
- *Managing Program Projects*
  - *Using the Program Project List Portlet*
  - *Managing Projects Using the Manage Program Page*
- *Managing Program Costs*
- *Managing Program Resources*
  - *Managing Resource Pools*
  - *Managing Staffing Profiles*
- *Managing Program Issues*
  - *Using the Program Issue List Portlet*
  - *Managing Issues Using the Manage Program Page*
- *Managing Program Scope Changes*
  - *Using the Program Scope Change List Portlet*
  - *Managing Scope Changes Using the Manage Program Page*
- *Managing Program Risks*
  - *Using the Program Risk List Portlet*
  - *Managing Risks Using the Manage Program Page*
- *Managing Program Resource Requests*
  - *Using the Resource Assignments Portlet*
  - *Using the Program Resource Request List Portlet*
  - *Managing Resource Requests Using the Manage Program Page*

- *Analyzing Programs*
    - *Using Activity Analysis*
    - *Using Resolution Time Analysis*
- 

## 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.

**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**

Priority	Count
Critical	1
High	3
Normal	2
Low	1

**Scope Changes (Level 1 and 2) - Total = 1**

Severity	Count
Critical	0
High	1
Medium	0
Low	0

**Risks - Total = 4**

Probability	Count
High	1
Medium	2
Low	1

Legend: Impact Level 3 (orange), Impact Level 2 (purple), Impact Level 1 (yellow)

**Resource Requests - Total = 3**

Priority	Count
Critical	3
High	0
Normal	0
Low	0

---

**Business Objectives** (1 Business Objective Exists)

---

**Notes**

---

**References**

---

**Related Actions**

[View Staffing Profiles for this Program.](#)

[View Resource Pools for this Program.](#)

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 Name	Relative Priority	Program Manager	Program State	Issues	Risks	Scope Changes	Resource Requests	Cost Health
<a href="#">Mita Demo</a>		Jane Smith	Active	0	0	0	0	0
<a href="#">QuickTimeUp</a>		Fred Bielo	Active	0	0	0	0	0
<a href="#">ERP Upgrade v1.4</a>		Jeremiah S...	New	0	0	0	0	0
<a href="#">Marketing Campa...</a>		Denise Newell	New	0	0	0	0	0
<a href="#">Sales Upgrade P...</a>		John Smith	Active	2	4	1	3	0

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.

Program Name	Relative Priority	Program Manager	Program State	Description
ERP Upgrade v1.4		Jeremiah Smith	New	
Marketing Campaign 04		Denise Newell	New	Create new marketing campaign for 04.
Mktg Demo		Jane Smith	Active	
QuickTimeUp		Fred Bleko	Active	
Sales Upgrade Program		John Smith	Active	Upgrade the Sales Demo to reflect functional added for release 5.4.

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.

**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**

Priority	Count
Critical	1
High	3
Normal	2
Low	1

**Scope Changes (Level 1 and 2) - Total = 1**

Severity	Count
Critical	0
High	1
Medium	0
Low	0

**Risks - Total = 4**

Probability	Count
High	1
Medium	2
Low	1

Legend: Impact Level 3 (Orange), Impact Level 2 (Purple), Impact Level 1 (Yellow)

**Resource Requests - Total = 3**

Priority	Count
Critical	3
High	0
Normal	0
Low	0

---

**Business Objectives** (1 Business Objective Exists)

---

**Notes**

---

**References**

---

**Related Actions**

[View Staffing Profiles for this Program.](#)

[View Resource Pools for this Program.](#)

Figure 4-3. Manage Program page

## Managing Program Projects

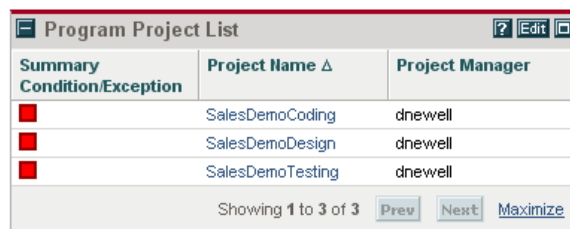
There are two places to obtain a convenient overview of projects associated with a program:




- 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.



Summary Condition/Exception	Project Name $\Delta$	Project Manager
	SalesDemoCoding	dnewell
	SalesDemoDesign	dnewell
	SalesDemoTesting	dnewell

Showing 1 to 3 of 3 [Prev](#) [Next](#) [Maximize](#)

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.

Program Name $\Delta$	Relative Priority	Program Manager	Program State	Description
ERP Upgrade v1.4		Jeremiah Smith	New	
Marketing Campaign 04		Denise Newell	New	Create new marketing campaign for 04.
Mtg Demo		Jane Smith	Active	
QuickTimeUp		Fred Bieko	Active	
Sales Upgrade Program		John Smith	Active	Upgrade the Sales Demo to reflect functional added for release 5.4.

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:

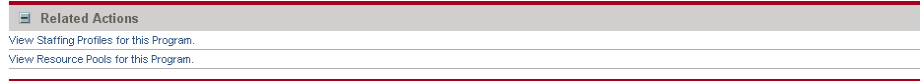
- On the Manage Programs page for a specific program, select the **EV Analysis** tab (see [Figure 4-6](#)).
- From the menu bar, select **Cost > Analyze > Programs > Current or Cumulative Cost Metrics**.



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.

**MERCURY** SIGN OUT

IT Governance Center Search for Program(s) To Manage > Search Results > Manage Sales Upgrade Program > Search Resource Pools > View Resource Pool: SalesDemo

---

**View Resource Pool: SalesDemo**

---

**Resource Pool Information**

**Resource Pool Status:** New **Active:** Yes

**Name:** SalesDemo

**Created On:** November 15, 2004 **Created By:** Denise Newell

**Description:**

---

**This Resource Pool is for:** Program - Sales Upgrade Program

**Start Period:** December 2004 **Finish Period:** February 2005

---

**Resource Pool Breakdown**

**Resource Pool Status:** New

		Resource Details					
		Q4 2004			Q1 2005		
Skill	Resource	Oct	Nov	Dec	Jan	Feb	Mar
Java Consultant	<input type="button" value="▶"/>			1.0			
Product Architect	<input type="button" value="▶"/>			1.0	1.0	1.0	
RandD Coding	<input type="button" value="▶"/>			1.0	1.0	1.0	
<b>Total FTE's for Month</b>				<b>3.0</b>	<b>2.0</b>	<b>2.0</b>	
<b>Average FTE's for Quarter</b>				<b>3.0</b>		<b>2.0</b>	

---

**Notes**

Currently there are no notes.

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](#).

The screenshot shows the Mercury IT Governance Center interface. The page title is "View Staffing Profile: Sales Demo". It includes navigation buttons for "Modify Staffing Profile", "Configure Access", and "Done".

**Staffing Profile Information**

Profile Status: New      Active: Yes

Name: Sales Demo      Workload Category:

Created On: October 15, 2004      Created By: Jane Smith

Description: This Staffing Profile was initiated by Request #30120

This Staffing Profile is for Project - Sales Demo and Project Plan - Marketing Promo Project; actuals are entered manually.

Start Period: September 2004      Finish Period: January 2005

**Staffing Profile Breakdown**

Profile Status: New      Staffing Profile Lines will not appear in capacity visualizations.

Skill	Resource	Q3 2004			Q4 2004			Q1 2005		
		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				
<b>Total FTE's for Month</b>				<b>1.0</b>	<b>2.0</b>	<b>3.0</b>	<b>3.0</b>	<b>4.0</b>		
<b>Average FTE's for Quarter</b>				<b>1.0</b>		<b>2.67</b>			<b>4.0</b>	

Show:  Plan Only     Plan and Actuals  
 View Lines In:  Months     Quarters    Apply

Notes: Currently there are no notes.

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.

Project Δ	Issue #	Priority	Escalation Level	Status	Description
SalesDemoCoding	30420	Normal	Project	New	SalesDemoCoding
SalesDemoCoding	30421	High	Project	New	SalesDemoCoding
SalesDemoCoding	30422	Critical	Project	New	SalesDemoCoding
SalesDemoDesign	30437	Normal	Project	New	Sales Demo Design
SalesDemoDesign	30438	Normal	Project	New	Sales Demo Design

Showing 1 to 5 of 6 [Prev](#) [Next](#) [Maximize](#)

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.

**MERCURY** SIGN OUT

IT Governance Center Search for Program(s) to Manage > Search Results > Manage Sales Upgrade Program

---

Sales Upgrade Program Issues Showing 1 to 3 of 3

Project	Issue #	Priority	Escalation Level	Status	Description
Sales Demo Migration Project	30101	High	Program	New	Marketing has not provided input.
Sales Demo Migration Project	30102	High	Program	New	Marketing has not provided input.
Sales Demo Migration Project	30103	High	Program	New	Marketing has not provided input.

Showing 1 to 3 of 3



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.

Project Δ	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.

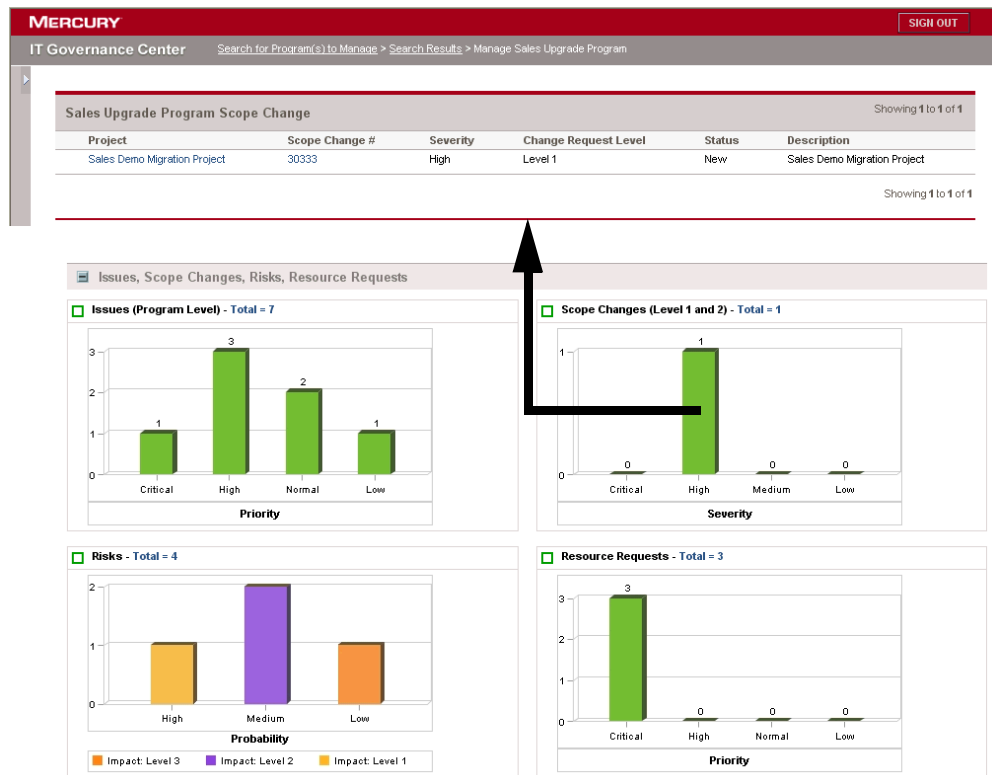


Figure 4-13. Managing scope changes

## 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.

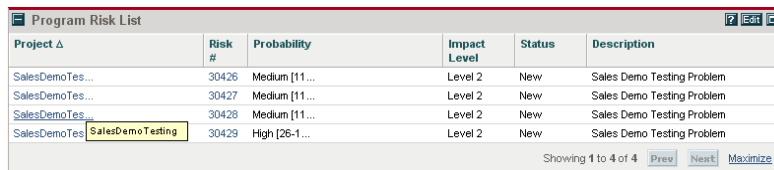
There are two places to obtain a convenient overview of risks associated with a program:

- 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.



Project Δ	Risk #	Probability	Impact Level	Status	Description
SalesDemoTes...	30426	Medium [11...	Level 2	New	Sales Demo Testing Problem
SalesDemoTes...	30427	Medium [11...	Level 2	New	Sales Demo Testing Problem
SalesDemoTes...	30428	Medium [11...	Level 2	New	Sales Demo Testing Problem
SalesDemoTes... <a href="#">SalesDemoTesting</a>	30429	High [26-1...	Level 2	New	Sales Demo Testing Problem

Showing 1 to 4 of 4 [Prev](#) [Next](#) [Maximize](#)

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.

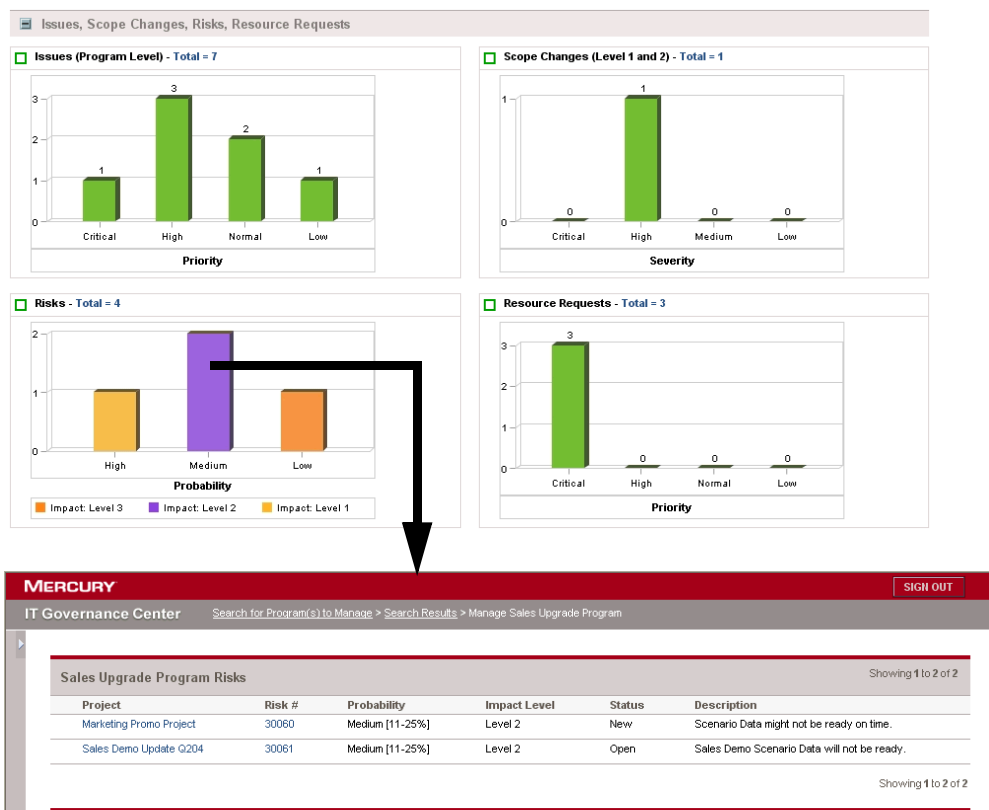


Figure 4-15. Managing risks

## 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

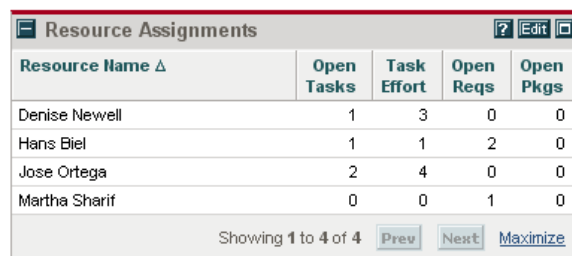
The Resource Assignments portlet provides a quick view of the workload for resources or groups of resources and the tasks, requests, and packages assigned to each (see [Figure 4-16 on page 64](#)).

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 <span>Δ</span>	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

Showing 1 to 4 of 4 [Prev](#) [Next](#) [Maximize](#)

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.

Project	Resource Request #	Priority	Status	Role Description
SalesDemoTes...	30434	Normal	New	Coder with Java and C++
SalesDemoTes...	30435	High	New	Coder with Java and C++
SalesDemoTes...	30436	Low	New	Coder with Java and C++

Showing 1 to 3 of 3 [Prev](#) [Next](#) [Maximize](#)

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.

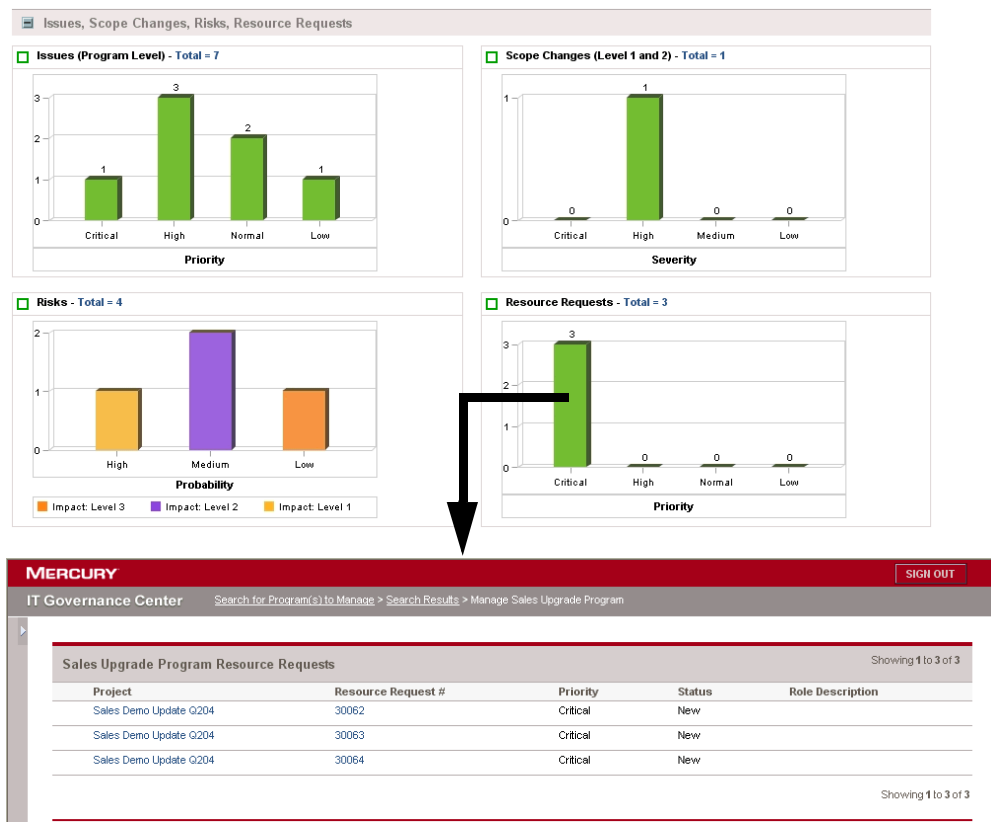


Figure 4-18. Managing resource requests

## 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.

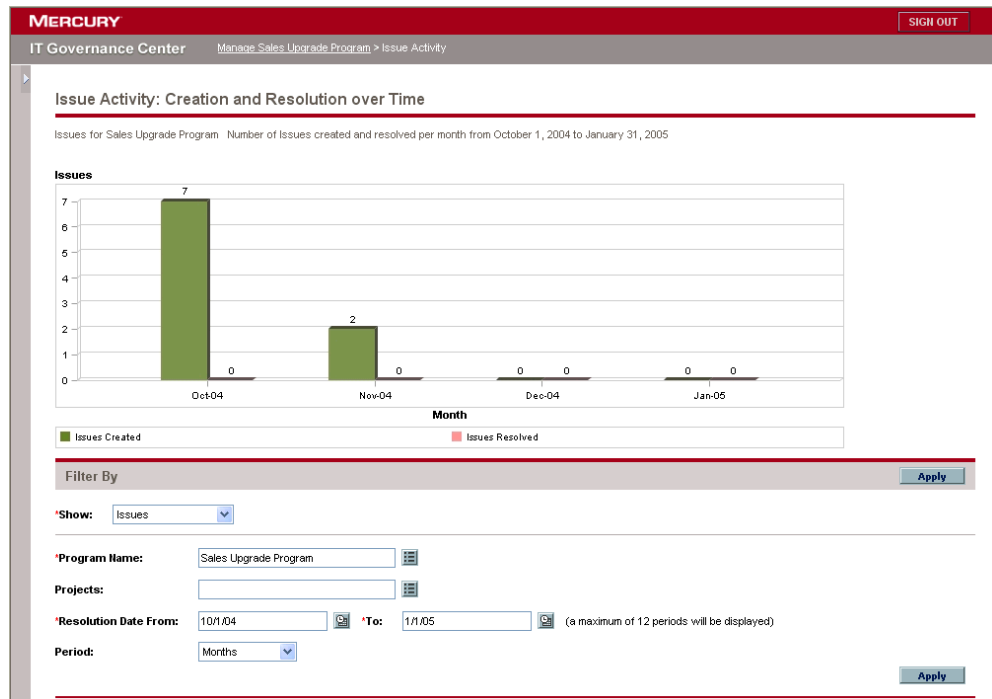
The standard interface is displayed.

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.

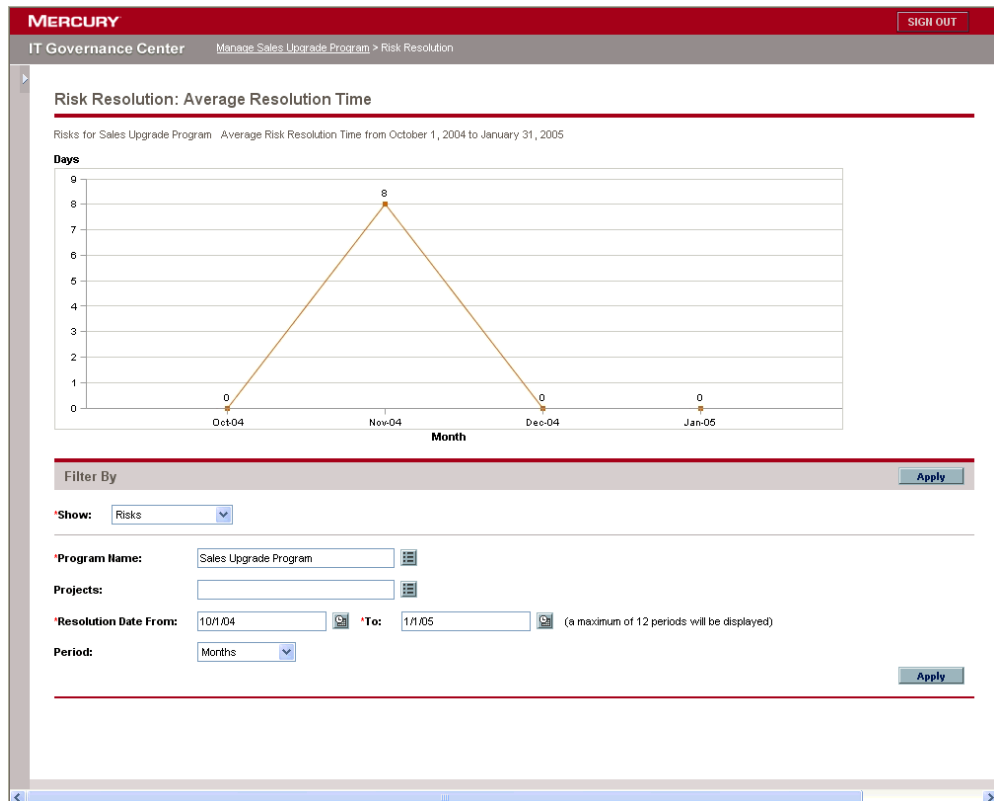
The standard interface is displayed.

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*
  - *Updating Program Priorities*
  - *Modifying Programs*
    - *Deleting Programs*
  - *Modifying Program Indicators*
  - *Modifying Program Access*
-

## 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

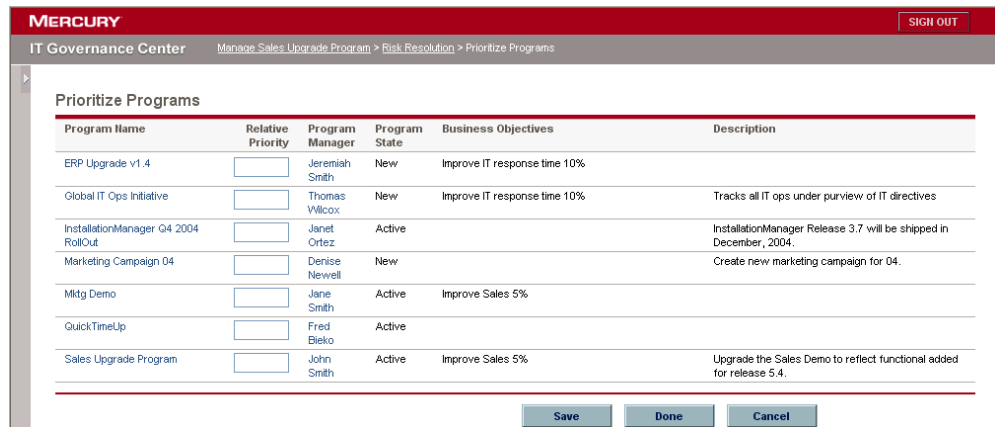
To change a program’s relative priority:

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.

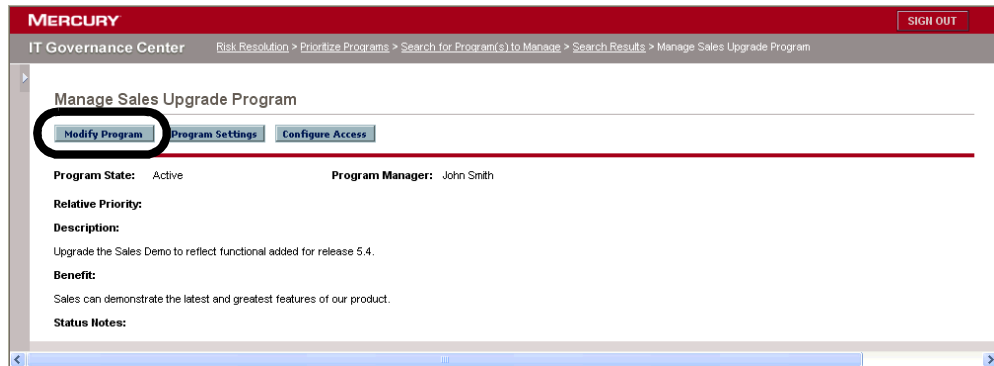
- b. In the Search for Programs to Manage page, complete the search criteria and click **Search**.

The Program Search Results page appears.

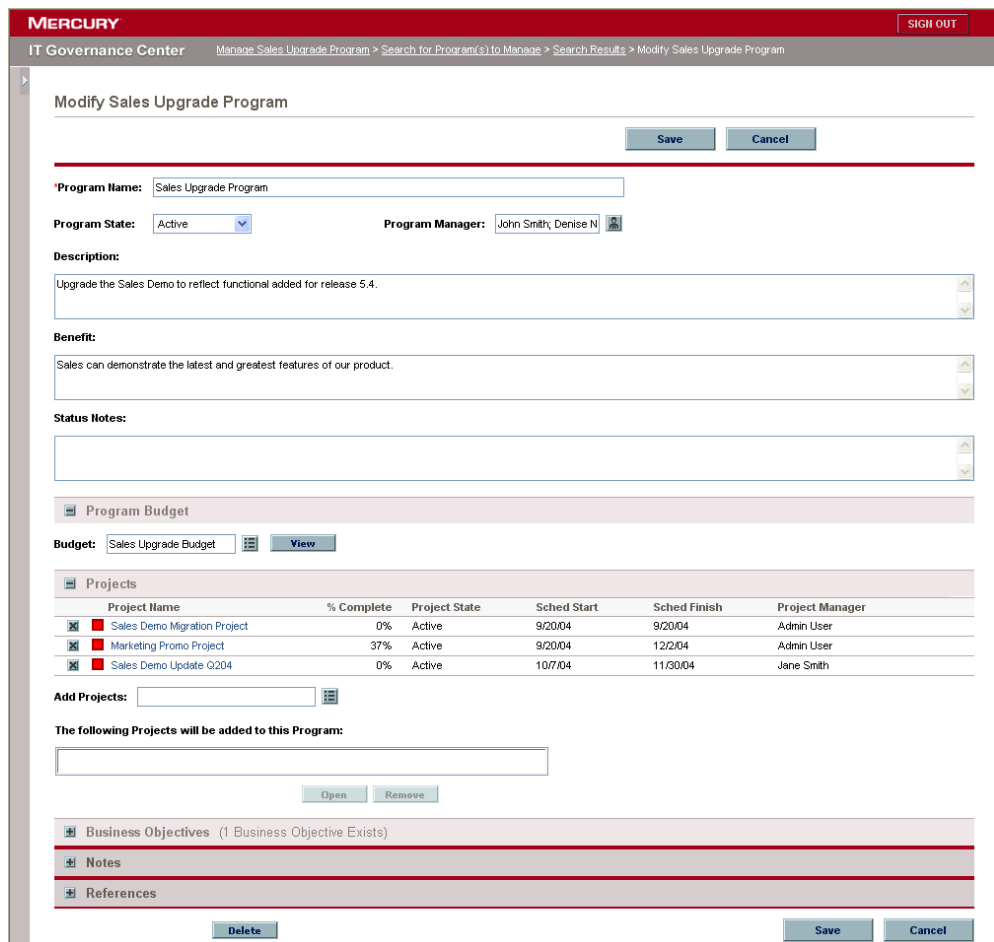
- c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

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.

The screenshot shows the Mercury Program Management interface. At the top, there is a red header with the Mercury logo and a 'SIGN OUT' button. Below the header is a breadcrumb trail: 'IT Governance Center > Manage Sales Upgrade Program > Search for Program(s) to Manage > Search Results > Modify Sales Upgrade Program'. The main content area is titled 'Modify Sales Upgrade Program' and contains several fields and sections:

- A 'Save' and 'Cancel' button pair at the top right.
- 'Program Name': A text field containing 'Sales Upgrade Program'.
- 'Program State': A dropdown menu set to 'Active'.
- 'Program Manager': A text field containing 'John Smith, Denise N' with a user icon.
- 'Description': A text area containing 'Upgrade the Sales Demo to reflect functional added for release 5.4.'.
- 'Benefit': A text area containing 'Sales can demonstrate the latest and greatest features of our product.'.
- 'Status Notes': An empty text area.
- A list of program components with expand/collapse icons:
  - Program Budget
  - Projects (3 Projects Exist)
  - Business Objectives (1 Business Objective Exists)
  - Notes
  - References
- A 'Delete' button at the bottom left and another 'Save' and 'Cancel' button pair at the bottom right.

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.

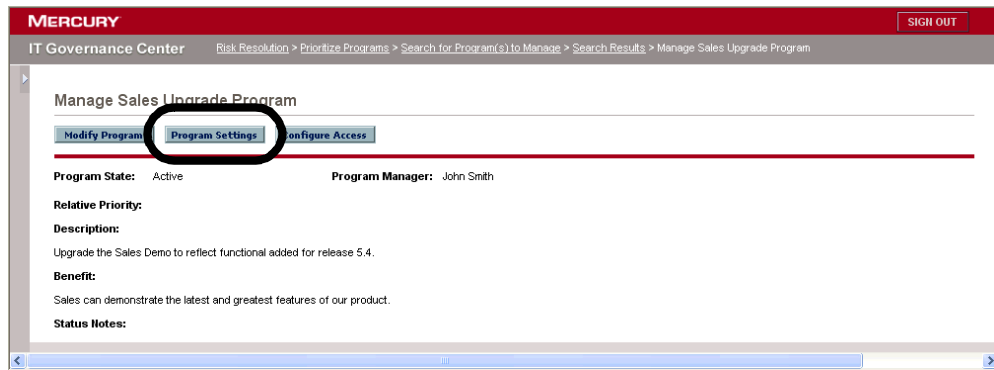
- b. In the Search for Programs to Manage page, complete the search criteria and click **Search**.

The Program Search Results page appears.

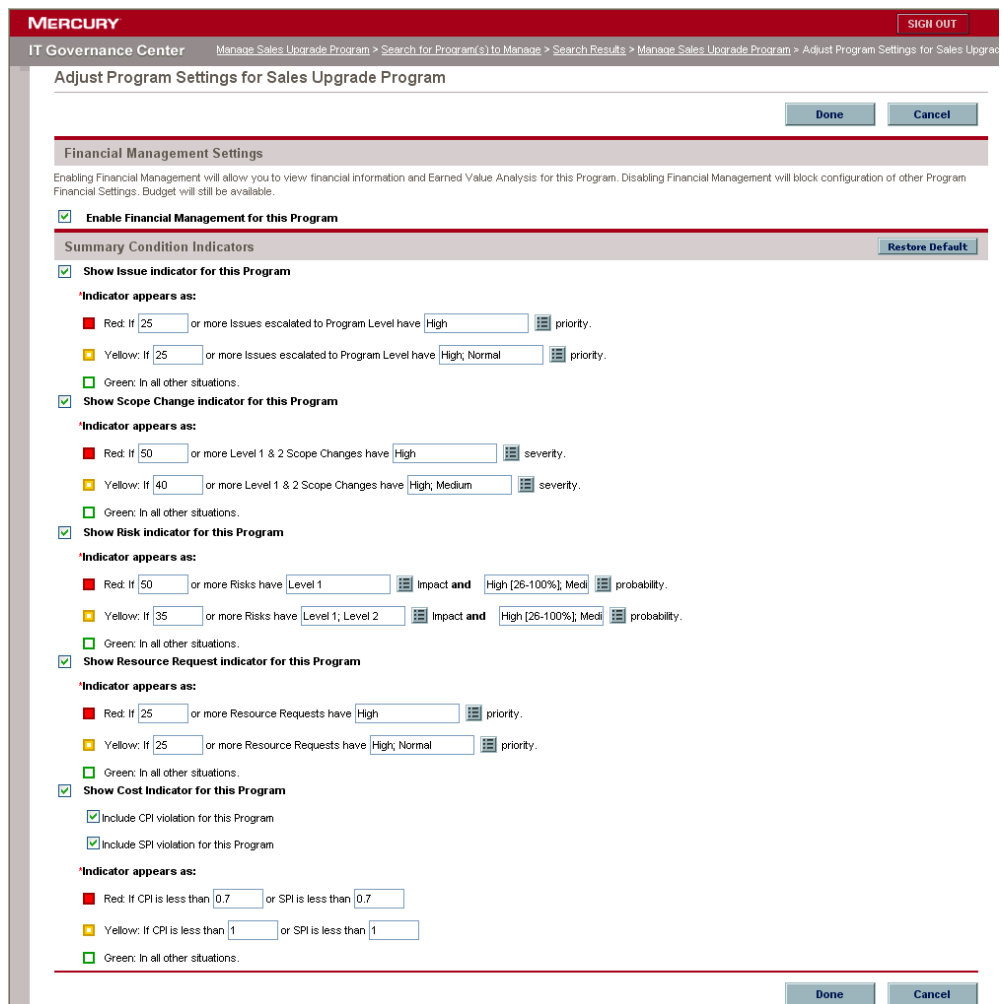
- c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

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.

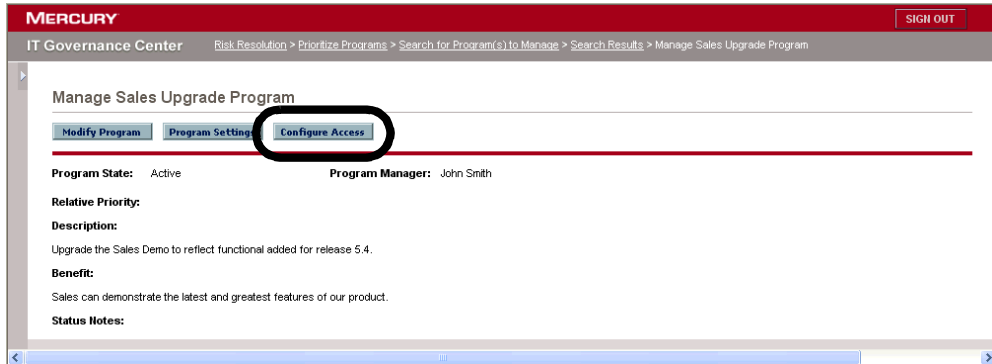
- b. In the Search for Programs to Manage page, complete the search criteria and click **Search**.

The Program Search Results page appears.

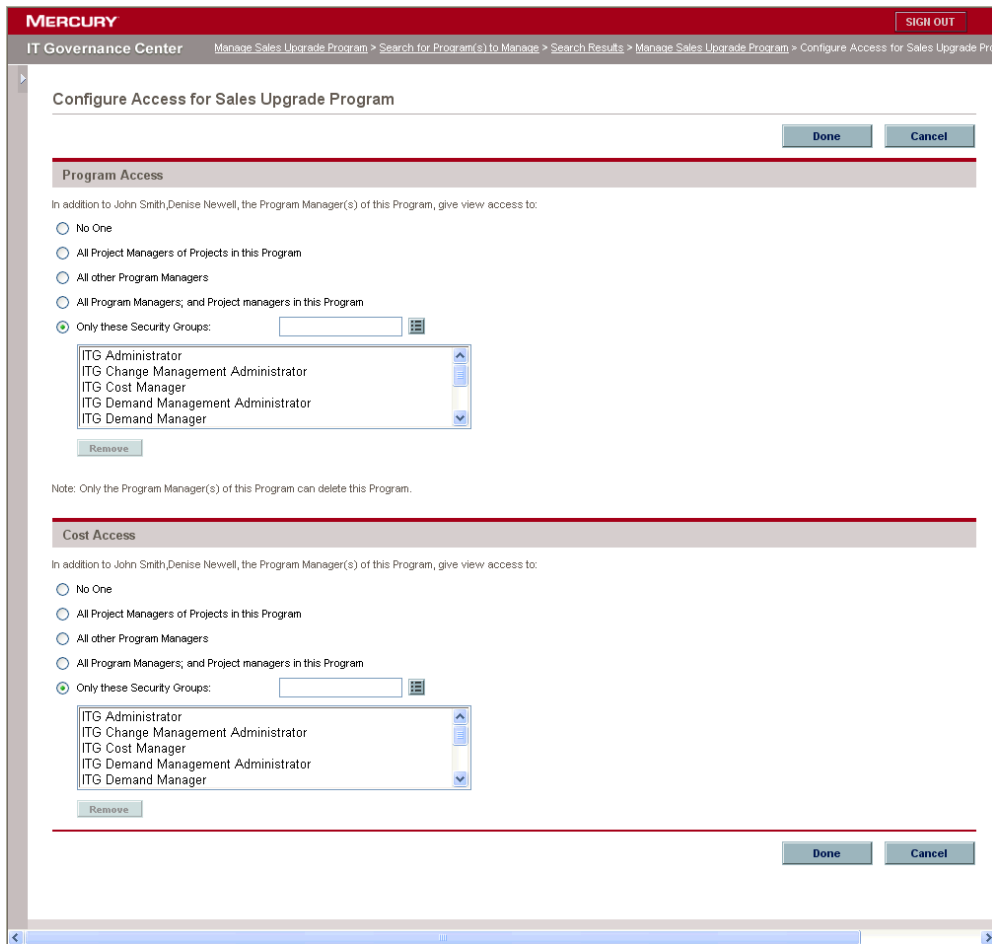
- c. In the Program Search Results page, click on an entry in the Program Name column to proceed to the Manage Program page.

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*
  - *Submitting Issues*
  - *Requesting Resources*
  - *Submitting Risks*
  - *Submitting Scope Changes*
-

## 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.

The screenshot shows the 'Create New PMO - Issue' form in the Mercury IT Governance Center. The form is titled 'Create New PMO - Issue' and has a 'SIGN OUT' button in the top right corner. The breadcrumb trail is: 'IT Governance Center > Search for Program(s) to Manage > Search Results > Manage Sales Upgrade Program > Create A Request > Create New PMO - Issue'. The form includes a 'Submit' and 'Cancel' button at the top right. Below the title, there are 'Expand All' and 'Collapse All' buttons. The form is divided into sections: 'Header' and 'Summary'. The 'Created By' field is populated with 'Denise Newell'. The 'Request Status' is 'Not Submitted'. The 'Assigned To' field is empty. The 'Master Project' field is empty. The 'Priority' field is a dropdown menu. The 'Escalation Level' field is a dropdown menu set to 'Project'. The 'Description' field is empty. Below the form, there are sections for 'Details', 'Issue Details', 'Notes', and 'References'. At the bottom right, there are 'Submit' and 'Cancel' buttons.

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.

The screenshot shows the Mercury IT Governance Center interface for creating a new PMO resource request. The breadcrumb trail is: Manage Sales Upgrade Program > Create A Request > Create New PMO - Issue > Create A Request > Create New PMO - Resource Request. The page title is "Create New PMO - Resource Request". There are "Expand All" and "Collapse All" buttons, and "Submit" and "Cancel" buttons at the top right. The form includes a "Header" and "Summary" section. The "Request Status" is "Not Submitted". The "Created By" field is populated with "Denise Newell". The "Assigned To" field is empty. The "Priority" field is a dropdown menu. The "Master Project" field is empty. The "Description" field is empty. Below the "Description" field is a "PMO Resource Request" section with a "Role" dropdown menu and a "Description" text area. At the bottom, there are "Details", "Resource Details", "Notes", and "References" sections, each with a plus icon. "Submit" and "Cancel" buttons are at the bottom right.

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.

The screenshot shows the 'Create New PMO - Risk' form in the Mercury IT Governance Center. The breadcrumb trail is: Create New PMO - Issue > Create A Request > Create New PMO - Resource Request > Create A Request > Create New PMO - Risk. The form includes a 'SIGNED OUT' button in the top right. The main form area has 'Expand All' and 'Collapse All' buttons on the left, and 'Submit' and 'Cancel' buttons on the right. The form is divided into sections: 'Header' and 'Summary' (collapsible), 'Details' (collapsible), 'Risk Details' (collapsible), 'Notes' (collapsible), and 'References' (collapsible). The 'Summary' section contains the following fields: 'Created By' (Denise Newell), 'Request Status' (Not Submitted), 'Assigned To' (empty), 'Master Project' (empty), 'Priority' (dropdown), 'Risk Impact Level' (dropdown), 'Probability' (dropdown), and 'Description' (text area). The 'Details' section contains the 'Risk Details' field. The 'Notes' and 'References' sections are currently empty. There are 'Submit' and 'Cancel' buttons at the bottom right of the form.



## 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.

The screenshot shows the Mercury IT Governance Center interface for creating a new PMO - Scope Change Request. The page title is "Create New PMO - Scope Change Request". At the top right, there is a "SIGN OUT" button. Below the title, there are "Expand All" and "Collapse All" buttons, and "Submit" and "Cancel" buttons. The form is organized into sections: "Header" and "Summary". The "Summary" section contains the following fields: "Created By" (Denise Newell), "Request Status" (Not Submitted), "Assigned To" (empty field with user selection icons), "Master Project" (empty field with selection icon), "Priority" (dropdown menu), "CR Level" (dropdown menu), "Business Impact Severity" (dropdown menu), and "Description" (text area). Below the "Summary" section, there are expandable sections for "Details", "Scope Change Details", "Notes", and "References". At the bottom right of the form, there are "Submit" and "Cancel" buttons. A scrollbar is visible at the bottom of the page.

## 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	<p>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:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Resource</li> <li>• State</li> <li>• Scheduled finish</li> <li>• Project hierarchy</li> </ul>
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	<p>Gantt chart for resources showing work items including:</p> <ul style="list-style-type: none"> <li>• Requests</li> <li>• Tasks</li> <li>• Milestones</li> <li>• Staffing Profiles</li> </ul>

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*
  - *Administrative Reports*
  - *Change Management Reports*
  - *Demand Management Reports*
  - *Financial Management Reports*
  - *Portfolio Management Reports*
  - *Program Management Reports*
  - *Project Management Reports*
  - *Resource Management Reports*
  - *Time Management Reports*
-

## 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 <i>Open Interface Guide and Reference</i> .



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 <i>Open Interface Guide and Reference</i> .
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 <i>Open Interface Guide and Reference</i> .
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 <i>Open Interface Guide and Reference</i> .
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 <i>Open Interface Guide and Reference</i> .
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: <ul style="list-style-type: none"> <li>• Other packages that contain common objects with a given package</li> <li>• 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</li> <li>• Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed</li> </ul>
Packages Pending	Lists: <ul style="list-style-type: none"> <li>• Open packages with pending activity</li> <li>• Details about each package</li> <li>• Pending work for a group of users</li> </ul>

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 Reference*.

## **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*.

## A

about this document **12**

access

- configuring for programs **34**
- for programs **79**

Activity analysis **67**

Actual Time Summary report **108**

Actual Time/Cost Summary report **102, 108**

adding

- attachments as references to programs **38**
- existing packages as references to programs **39**
- existing requests as references to programs **41**
- new packages as references to programs **39**
- new requests as references to programs **41**
- projects as references to programs **40**
- tasks as references to programs **42**
- URLs as references to programs **43**

administrative reports **96**

analysis

- Activity **67**
- Resolution Time **68**

Analyze Assignment Load portlet **93**

Analyze Resource Pools portlet **93**

analyzing

programs **67**

attachments

- program reference **38**

audience types **13**

## B

business objectives

- configuring **19**
- creating **18**
- deleting **20**
- overview **18**

## C

categories of reports **96**

Change Management reports **99**

chapter overview **12**

Compare Custom Database Setup report **99**

Compare Filesystem Environment report **99**

Compare MS SQL Server 7 Environments report **99**

Compare Oracle Environments report **99**

Compare Project and Staffing Profile portlet **93**

configuring

- business objectives **19**
- program access **34**
- program indicator settings **77**

- program settings 30
- programs 73
- Contact Detail report 101
- Contact Synchronization report 96, 106
- costs
  - adjusting indicators for programs 30
  - Cost Performance Index 30
  - information for programs 53
  - managing for programs 53
  - Schedule Performance Index 31
- CPI 30
- creating
  - business objectives 18
  - program access 79
  - program issues 85
  - programs 22, 25
  - requests affecting programs 84
  - risks for programs 88
  - scope changes 89
- Current Resource Load by Organization portlet 93
- Current Resource Load By Skill portlet 93
- D**
- deleting
  - business objectives 20
  - programs 75
- DEM Demand Creation History report 101
- DEM Historical SLA Violation report 101
- DEM Satisfied Demand History report 101
- Demand Management reports 101
- Distribution Detail report 99
- E**
- Environment Comparison by Objects Migrated report 99
- Environment Comparison report 96
- Environment Detail report 96
- Environment Group Detail report 96
- Environments/Objects Detail report 99

- F**
- Financial Management reports 102
- I**
- Import Requests report 96
- Import Users report 97
- indicators for programs 77
- issues
  - adjusting program settings 30
  - managing for programs 58
- L**
- LDAP server, importing data from 97
- Lookup Types report 97
- M**
- Manage Program page 53, 59, 61, 63, 66
- managing
  - Manage Program page 59
  - program cost information 53
  - program costs 53
  - program issues 58
  - program overview 46
  - program projects 52
  - program resource requests 64
  - program resources 55
  - program risks 63
  - program scope changes 61
  - resource for programs 66
  - resource pools for programs 55
  - risks 62
  - scope changes 60
  - staffing profiles for programs 57
- My Tasks portlet 92
- N**
- Notification History report 97

**O**

Object History report 99  
Object Type Detail report 97  
Objects/Environments Detail report 99  
opening  
    programs 48

**P**

Package Details report 99  
Package History report 99  
Package Impact Analysis report 99  
packages  
    program reference 39  
Packages Pending report 99  
Portfolio Management reports 103  
Portlet Detail report 97  
portlets  
    Program Issue List 58  
    Program Management 91  
    Program Resource Request List 65  
    Program Risk List 62  
    Program Scope Change List 60  
    projects 92  
    Resource Assignment 64  
    Resource Management 93  
    using Program List 48  
prerequisite documents 14  
priorities  
    updating for programs 72  
Program List portlet 91  
Program Management  
    overview 15  
    portlets 91  
Program Management reports 103  
Program Project List portlet 52, 92  
Program Resource Request List portlet 65  
Program Risk List portlet 62  
Program Scope Change List portlet 60  
programs  
    Activity analysis 67

    adjusting program settings 30  
    analyzing overview 67  
    attaching projects 28  
    attaching references 28  
    configuring 73  
    configuring access 34  
    configuring indicator settings 77  
    configuring settings 30  
    creating 22, 25  
    creating access 79  
    creating issues 85  
    creating requests affecting programs 84  
    creating risks 88  
    creating scope changes 89  
    deleting 75  
    entering program information 25  
    Manage Program page 50, 53, 59, 66  
    managing cost information 53  
    managing costs 53  
    managing issues 58  
    managing overview 46  
    managing projects 52  
    managing resource pools 55  
    managing resource requests 64  
    managing resources 55, 66  
    managing risks 62, 63  
    managing scope changes 60, 61  
    managing staffing profiles 57  
    opening 48  
    overview 15, 22  
    portlet list 91  
    Program Resource Request List portlet 65  
    Program Risk List portlet 62  
    Program Scope Change List portlet 60  
    references list 38  
    requesting resources 86  
    Resolution Time analysis 68  
    Resource Assignments portlet 64  
    searching 48  
    starting with request 23  
    updating overview 72  
    updating priorities 72  
Project Cost Breakdown report 102, 104

Project Cost Details report **102, 104**  
Project Critical Path report **104**  
Project Custom Detail report **104**  
Project Detail (Filter by Custom Fields) report **104**  
Project Detail report **104**  
Project Exception Detail report **104**  
Project Gantt portlet **92**  
Project List portlet **92**  
Project Management reports **104**  
Project Resource report **104, 106**  
Project Schedule Change report **104**  
Project Status Detail report **104**  
Project Summary Pie Chart portlet **92**  
Project Summary report **104**  
Project Task Assignment report **104, 106**  
Project Template Detail report **104**  
projects  
    attaching to programs **28**  
    portlet **92**  
    program reference **40**

## **R**

RCS Check In report **97**  
RCS Check Out report **97**  
references  
    adding attachments to programs **38**  
    adding existing packages to programs **39**  
    adding existing requests to programs **41**  
    adding new packages to programs **39**  
    adding new requests to programs **41**  
    adding projects to programs **40**  
    adding tasks to programs **42**  
    adding URLs to programs **43**  
    attaching to programs **28**  
    for programs **38**  
related documents **14**  
Release Detail report **100**  
Release Notes report **100**  
Report Type Detail report **97**

Request Detail (Filter by Custom Fields) report **101**  
Request Detail report **101**  
Request Header Type Detail report **97**  
Request History report **101**  
Request Quick View report **101**  
Request Summary (Filter by Custom Fields) report **101**  
Request Summary report **101**  
Request Type Detail report **97**  
requests  
    program reference **41**  
    requesting resources for programs **86**  
    starting a program **23**  
Resolution Time analysis **68**  
Resource Assignment portlet **64**  
Resource Gantt portlet **92**  
Resource Load by Priority report **101, 106**  
Resource Management  
    portlet **93**  
Resource Management reports **106**  
Resource Pool List portlet **93**  
resource pools  
    managing for programs **55**  
resource requests  
    adjusting for programs **30**  
resources  
    managing for programs **64**  
    programs **55, 86**  
risks  
    adjusting program settings **30**  
    creating for programs **88**  
    managing for programs **63**  
    managing program **62**  
Run Field Security Denormalization report **97**  
Run ITG Organization Unit Interface report **97**  
Run ITG Package Interface report **97**  
Run Workflow Transaction Interface report **97**



---

**S**

scope changes  
    adjusting program settings **30**  
    creating for programs **89**  
    managing for programs **60, 61**  
searching  
    for programs **48**  
Security Group Detail report **97**  
Special Command Detail report **98**  
SPI **31**  
Staffing Profile List portlet **93**  
staffing profiles  
    managing for programs **57**  
Synchronize Meta Layer report **98**

**T**

tasks  
    program reference **42**  
Time Management reports **108**  
Time Sheet Details report **108**  
Time Sheet Summary report **108**

**U**

updating  
    program priorities **72**  
    programs **72**  
URLs  
    program reference **43**  
User Data Detail report **98**  
User Detail report **98, 106**  
using  
    Activity analysis **67**  
    Manage Program page **50, 53, 59**  
    Program Issue List portlet **58**  
    Program List portlet **48**  
    Program Project List portlet **52**  
    Program Resource Request List portlet **65**  
    Program Risk List portlet **62**  
    Program Scope Change List portlet **60**  
    Resolution Time analysis **68**

Resource Assignments portlet **64**

**V**

Validations report **98**

**W**

Work Allocation Details report **106, 108**  
Workflow Detail report **98**  
Workflow Statistics report **98**

