

# MERCURY IT GOVERNANCE CENTER RELEASE 6.0 PREVIEW

## INTRODUCTION

CEOs and CFOs understand the value enterprise applications have brought their business. Enterprise Resource Planning systems have consolidated disparate financial systems and enforced compliance, giving CFOs an instant, accurate view of their finances. Other applications have brought the same power to sales, purchasing, and other parts of the business.

Increasingly, C-level executives expect their IT organizations to follow suit, and run like a business. Mercury IT Governance Center™ lets you do just that: govern and manage the priorities, processes, and people of IT – from demand through production – to reduce cost and risk, align IT more closely with business goals, and maximize IT's value to the business.

Mercury IT Governance Center is the first integrated transaction system for IT. It includes real-time IT governance to turn the dials and make decisions, and the most comprehensive system available to help comply

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with regulations such as Sarbanes-Oxley and Basel II. It offers support for quality programs and process control frameworks such as Six-Sigma, CMMI (Capability Maturity Model Integration), ITIL (IT Infrastructure Library), ISO-9000, and CobIT (Control objectives for information and related Technologies).

Mercury IT Governance Center gives CIOs the comprehensive visibility and control over IT initiatives and operations necessary to run IT like a business.

### Release Summary

Mercury IT Governance Center 6.0 adds significant depth in key areas and includes an improved interface incorporating the new Mercury brand. Among major features in this release:

“Evolving from a cost center, IT is taking on the character, rigor, and practices of a business within a business. It won’t be easy, but for CIOs it’s a matter of survival.”

– CIO Magazine Special Report, “How to Run IT Like a Business,” May 2004

#### Six-Dimensional “What-if” Portfolio Management Scenarios

Optimizing an IT portfolio requires a careful balance of risk, value, resources, and budget with business priorities. But you can lose this balance quickly unless you take into account a sixth dimension: time. Release 6.0 lets you visualize and interactively adjust the start and end dates of projects in “what-if” scenarios. This provides conclusive assurance that you can actually execute an optimized IT portfolio.

#### Improved Resource Search for Assigning Resources Across Projects and Operational Activities

New search capabilities make it even easier to find the right resource or resolve resource conflicts. Most resource management products focus on projects, but in the real world of IT, resources usually work on both projects and operational activities, with operational activities making up 60-80 percent of the total work. Mercury Resource Management™ covers both projects and operational activities, so no matter how your IT resources divide their time, Resource Search always gives you a complete view of resource availability.

#### Best-of-Class Document Management

Documents are critical components to many IT projects and operational activities. In most cases, though, they’re not treated that way. In most IT operations, users have to juggle a document management system and a separate project management application, requiring time-consuming, error-prone manual coordination. This is hardly a “best-practice” situation. Mercury IT Governance Center 6.0 adds best-of-class document management capabilities from a leading document management provider to its best-in-class workflow to help you ensure that documents are created, reviewed, and updated at the right time by the right resources in a unified process.

Other major features in Release 6.0 include:

- Unlimited International Calendars
- Self-Service Resource Calendar Updates
- SOP 98-1 Monitoring and Enforcement
- Multi-Currency Support
- Next Generation Dashboard
- Additional Customer-Driven Enhancements

**Feature Benefits**

**Time-Based Scenarios for Portfolio Planning**

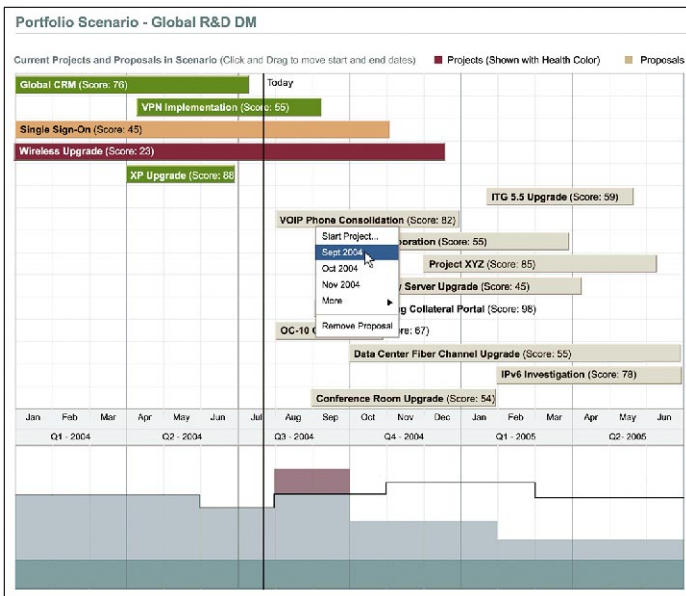
One of the biggest challenges in project portfolio management is determining when to start projects once the optimal mix has been selected. Business customers usually want their projects to start

immediately, even when the overall business would be better served by a different schedule, or when available resources are strained. Release 6.0 includes time-based scenario planning in Mercury Portfolio Management™, adding an additional sixth dimension to “what-if” scenarios. Now, while evaluating projects, proposals, and assets to balance risk, value, resources, and budget with business priorities, you can also easily try out different start and end dates for proposed projects, a crucial attribute for optimizing your portfolio. As always, you can create multiple scenarios to try out an unlimited number of options. Robust security allows you to segregate who sees what.

**New and Improved Resource Search**

Release 5.5 introduced a new feature, empowering users to find the right resources to handle project tasks and Demand Management

requests, using such attributes as skill, location, and organization unit. Release 6.0 improves this feature to include additional search attributes, such as multiple skills. Search results are ranked based on a best-fit algorithm, displaying resource availability for the time period in question, including drill down access to the actual work items assigned to each resource. This feature makes it faster and easier for project or resource managers to quickly resolve staffing issues or resource conflicts.



Time-based “what-if” scenarios in Mercury Portfolio Management make it easier to choose the right mix of projects at the right time.

Assign User Acceptance Test: Select Resources to Assign

Task: User Acceptance Test Task Start: 09/02/04 Task Finish: 11/08/02  
 Duration: 5 days Effort 12

Resource Name	Suitability Score	Availability Score	Skill Score	Projected Utilization	9/02/04	11/08/04
<input checked="" type="checkbox"/> Barbara Getty	90%	40	50	60%		
<input checked="" type="checkbox"/> Ron Steele	85%	55	30	85%		
<input type="checkbox"/> Steve Waldman	80%	40	40	80%		
<input type="checkbox"/> John Goodall	80%	57	23	80%		
<input type="checkbox"/> Dave Nemer	75%	30	45	90%		
<input type="checkbox"/> Scott Cranston	60%	20	40	80%		
<input checked="" type="checkbox"/> Jim Frank	43%	20	23	75%		
<input type="checkbox"/> Robert Brown	35%	20	15	65%		

Refine Search Criteria and Search again

Availability Within Dates: 09/02/04 to 11/08/04

Duration: 5 days Effort: 12

Skill/Level: Java Developer Level 2 Org Unit: Location: San Francisco

Resource Name: Category: Department:

Search Cancel

Resource Search in 6.0 makes it faster and easier to both staff projects and meet ongoing “keep-the-lights-on” demand.

Resource Search can now be accessed from more screens within IT Governance Center applications, including Project Workbench and Staffing Profiles, as well as from a main menu link. Regardless of how it is accessed, Resource Search provides the same detailed assignment information across both projects and “keep-the-lights-on” activities.

Another enhancement allows end users to interactively change the timeframe of the Gantt view on the Resource detail page.

**Unlimited International Calendars**

As IT operations become increasingly multi-site and multi-source, coordinating schedules becomes essential for maximizing productivity. To

help distributed organizations manage differences between calendars in different regions, organization units, and projects, Release 6.0 provides multiple international calendars. Each organization unit or project can use a different international calendar. When combined with the current Resource Calendars available in Mercury IT Governance Center, you now have unlimited flexibility in defining work schedules used by resource and project managers to staff projects and resolve resource issues.

As always, the scheduling engine in Mercury Project Management™ uses calendar information when building the schedule for a project.

**Self Service Updates to Resource Calendars**

Release 6.0 includes new screens in the HTML interface to update Resource Calendars. Now individual resources can update their own calendars. Of course, in organizations requiring greater control, managers can preclude any or all users from making self-service calendar updates. If an organization requires pre-approval of calendar updates, workflows in Mercury Demand Management™ can be used in conjunction with Resource Calendars to digitize, enforce, and automate the process of updating resource calendars.

Modify Calendar for Albert Brown

Current Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15 Company Offsite	16	17	18	19	20 Training
21	22	23	24	25	26	27
28	29 Vacation	30 Vacation	31 Vacation	1 Vacation	2 Vacation	3
4	5	6	7	8	9	10

Set Selected Days to: Reason: Description:

Working Day  
 Non-Working Day  
 Default from Regional Calendar: <Name> (8 hours/day)  
 Working Day  
 Non-Working Day

Save Cancel

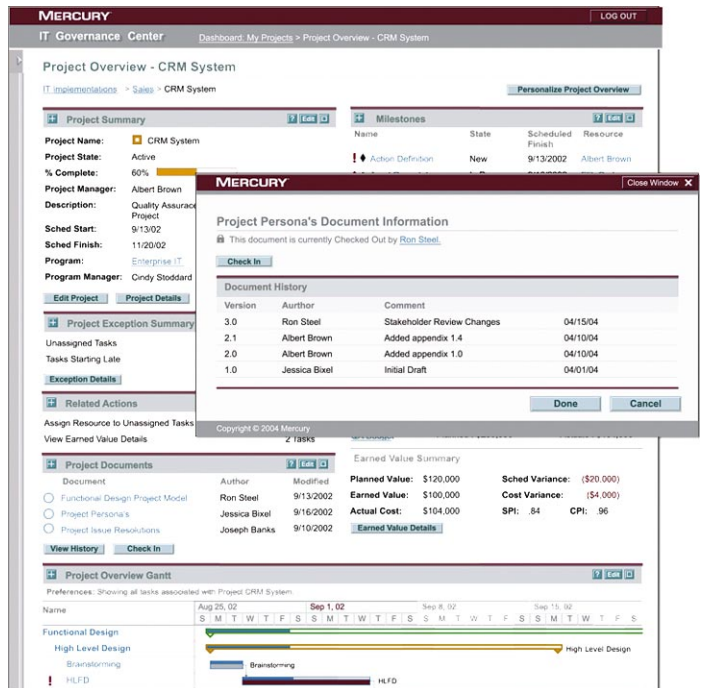
Resources can maintain their own calendars through the HTML interface. Resource calendars are used in conjunction with the appropriate base calendar to calculate schedules or availability/utilization on the dashboard in portlets such as Analyze Assignment Load.

**Best-of-Class Document Management**

Documents are essential components of projects. Mercury IT Governance Center has always offered the ability to attach just about any kind of unstructured content – including requirements, business justifications, deliverables, and diagrams – to requests, proposals, projects, assets, and other records. Release 6.0 offers significant improvements to document management, giving users much more control over storing and creating documents and searching for information.

The new release integrates document management capabilities from a leading vendor to Mercury IT Governance Center’s workflow, creating an integrated process ensuring documents are created, reviewed, and updated at the right time by the right resources. Release 6.0 includes the ability to check in and check out documents as standard operations and follows both standard and configured workflows. For example, say a user is required to complete a business case document prior to submitting the proposal for review. Mercury IT Governance Center workflow enforces this requirement: If the document is not completed, the user cannot move forward in the workflow. As documents are checked out and checked back in, new versions are created and stored, providing easy access to older versions of documents. For example, users can quickly see what has changed between updates to a business case document. Of course, documents follow the same robust security rules available on all entities in the IT Governance Center, including field-level security so users only see information relevant to them.

Document Management in Release 6.0 also includes the ability to search for records based on the contents of a document attached to that record. Using keywords and wild card operators, end users can quickly find and navigate to appropriate proposals, projects, assets, requests, or other records, regardless of where details about that record reside.

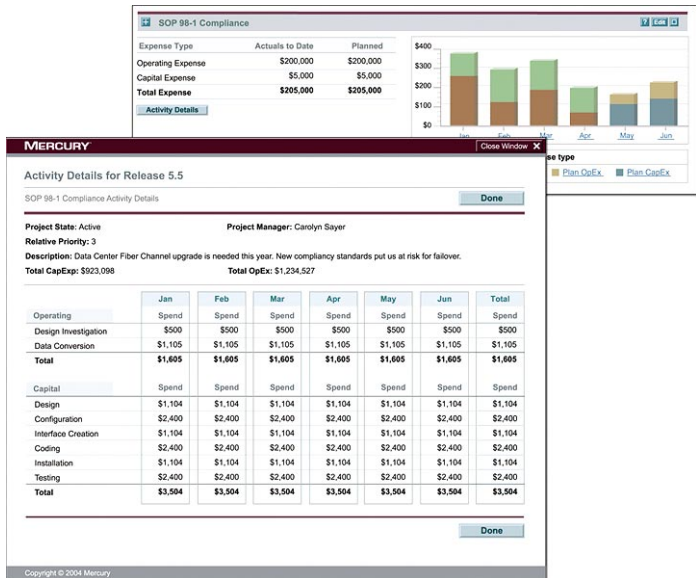


Use Document Management to control updates and capture version history on documents.

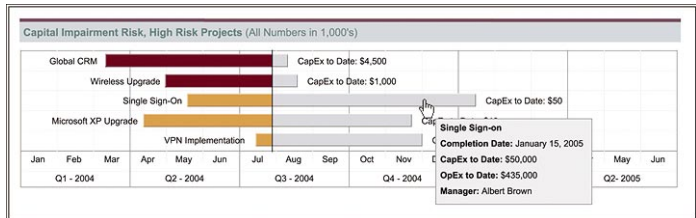
**SOP 98-1 Monitoring and Enforcement**

Recent regulations make it essential to have an accurate, dependable, and auditable project management and cost tracking system that allows costs to be tracked, allocated, and reported properly. A regulation

called SOP 98-1 (Statement of Position 98-1, Accounting for the Costs of Computer Software Developed or Obtained for Internal Use), issued in 1998, establishes guidance on accounting for costs incurred related to internal software development and use. It requires that companies capitalize qualifying costs incurred during the application development stage. All other costs in connection with an internal use software project are to be expensed as incurred. As corporate and outside auditors look more closely at all aspects of accounting practices, CIOs must pay more attention to SOP 98-1 compliance.



Track capital vs. operating expenses down to the task level to enable SOP 98-1 compliance.



The Capital Impairment Risk portlet provides real-time visibility into capital exposure on current projects.

**Multi-Currency Support**

Most global organizations do much of their planning locally. A business unit headquartered in Germany budgets and reviews financial information in Euros while its corporate parent in the United States reviews the same information in U.S. dollars. Release 6.0 supports multiple currencies in the budgeting process and in actual costs on projects and programs. This includes:

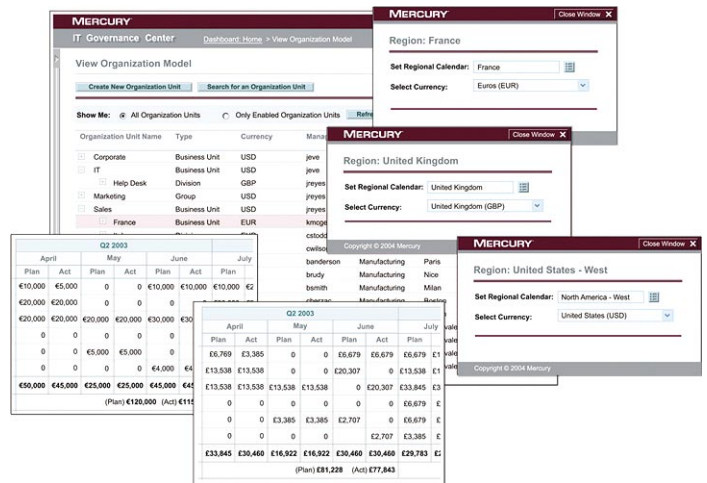
- Storage of exchange rates with date ranges.
- Individual resource rates in a local currency.

Mercury Financial Management™ assists in SOP 98-1 compliance by tracking the distinction between capital and operating expenses in projects and tasks. Project templates provide standard definitions of tasks, so project managers don't necessarily have to be well versed in SOP 98-1 specifics.

Portlets and views provide running totals of capital and operating expenses for projects and programs and include multi-level drill down on individual tasks to capture details.

- Currency settings at the project and program level.
- Personal preferences for projects, budgets, programs, and portfolios for the default currency.

End users can select a currency preference for viewing and entering financial data while other users can view the same data using a different currency. These conversions are automatic using the appropriate exchange rate, so you don't have to worry about entry mistakes attributable to all users using slightly different conversion techniques.



View and enter financial data in local currencies.

Finally, Portfolio Scenarios provide visibility into currency exposure. Depending on the amount of budget planned in foreign currencies, the organization may have a large exposure to exchange rate fluctuations. This view helps you proactively identify areas of exposure, allowing the company to hedge against them if warranted.

**Next-Generation Dashboard**

**JSR 168 and WSRP Standards Support**

Release 6.0 includes the next-generation Mercury IT Governance Dashboard™. Recognizing that many customers want to integrate a variety of additional data sources into their dashboards, Release 6.0 includes support for both JSR 168 and WSRP standards for portlet definition and distribution. Beyond allowing all Mercury Centers to share portlets, it also allows customers to plug JSR 168-compliant portlets from third-party systems directly into IT Governance Dashboard. Similarly, IT Governance Center portlets can also be used within third party JSR 168- or WSRP-compliant portals.

**Auto Refresh**

IT Governance Dashboard shows real-time information to its users. In Release 6.0, customers can select an auto-refresh attribute that automatically reloads portlet data at user-specified intervals.



**Drag-and-Drop Dashboard Personalization**

End users can personalize their dashboard layout with simple drag-and-drop on HTML pages. This allows end users the ability to quickly select from hundreds of out-of-the-box portlets and lay them out in the order that makes the most sense to them.

**HTML Configuration**

All Dashboard portlet configuration is now done in the HTML interface. Users configuring portlets no longer need to build them in the Workbench and then switch to the HTML interface to test and distribute them.

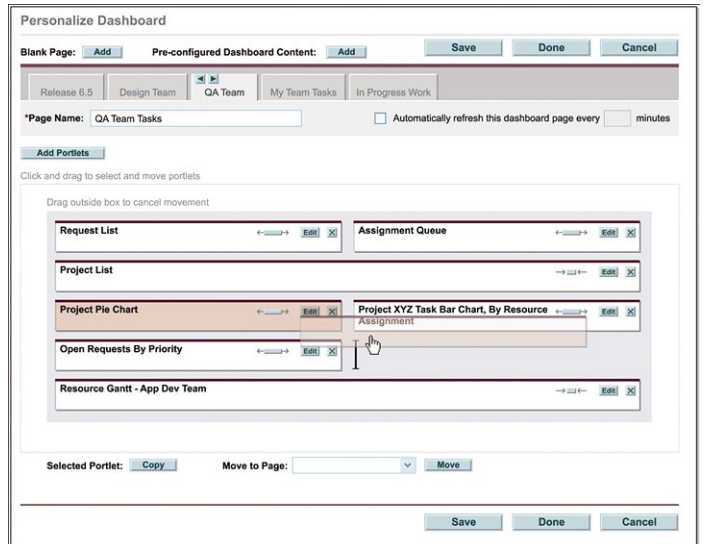
**Additional Customer-Driven Enhancements**

Customer requests and suggestions drive the continuous improvement of Mercury IT Governance Center. Release 6.0 includes many customer-driven enhancements. Here is a sample. A complete list will be published in the Release Notes when the product is generally available.

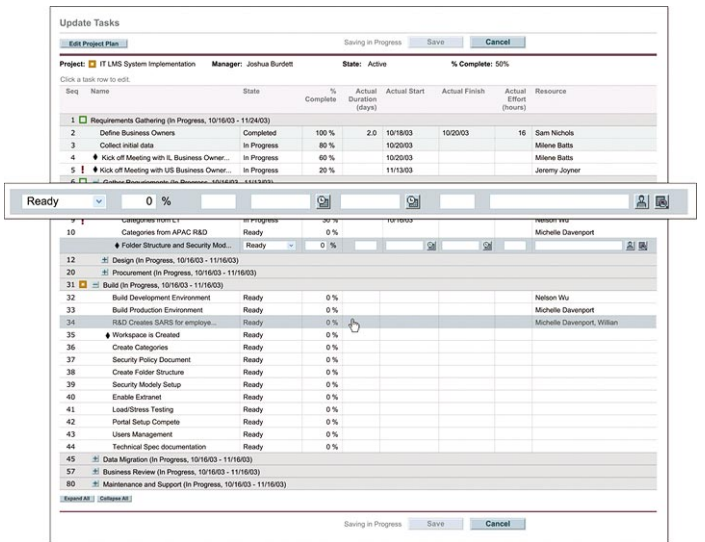
**Conversion of Project Management Functions to HTML**

Project Managers will find Release 6.0 easier than ever to use, with significantly more user functionality shifted from the Workbench to the HTML interface. Project managers can now update task actuals in the HTML interface, including actual start date, actual finish date, actual duration, actual effort, status, and any other enabled actual fields. Percent complete can also be updated from the HTML interface by the project manager.

Project managers can assign resources, or change assignments in the HTML interface. Release 6.0 includes the ability to update multiple assignments on a single page and provides access to the Resource Finder discussed above.



Drag-and-drop portlets to personalize a dashboard.



Project managers can update project details in the HTML interface.

These improvements enable project managers to perform most of their work in the HTML interface. The remaining functions in the Workbench are used mainly during the planning stage of the project – building the schedule and identifying constraints, predecessors, and other dependencies.

#### **Assign Skills to Project Tasks**

Part of creating a work breakdown structure is identifying the type of work required for a task and the type of resource needed to complete it. Mercury Project Management has always provided detailed schedule planning capability. Release 6.0 adds the ability to assign skills to tasks during the planning phase. By assigning skills, the project manager can iteratively build the project plan while “informing” the system about resource requirements prior to actually specifying a resource by name.

Managers can access resource availability and utilization views that factor in these assignments at the skill level. A new “Unassigned Resource Load” view shows you work assigned at the skill level that has not yet been assigned to a named resource. Once a specific resource is assigned (in addition to the skill), availability and utilization are automatically updated so you don’t have to worry about double counting.

This includes updates to earned value calculations to use skill rates instead of resource rates when a resource rate is not available.

#### **Portfolio Security**

Several minor enhancements to the security model in Portfolio Management now allow much more granular levels of portfolio security. Proposals, projects, and assets can be segregated by business unit, organization unit, or other distinction. And because security is flexible, you can create portfolios that are relevant for each part of the organization. For example, the CIO has access to all proposals, projects, and assets while the retail business unit can only see proposals from that unit.

#### **Time Management Enhancements**

Release 6.0 includes several enhancements to Mercury Time Management™ that assist both end users making timesheet entries and the approvers or timesheet administrators. These new functions, screens, and portlets provide greater flexibility to timesheet administrators and approvers while making timesheet entry easier for end users.

#### **Request Search Improvements**

In Release 6.0, Request Search has been enhanced to allow users to search for blank values in text fields, date fields, and fields using an auto-complete. For example, you can now search for all Requests where Assigned To is empty. This feature is available from both the basic and advanced search screens.

### **Report Conversions**

Release 6.0 adds additional improvements to the significant updates to the Reporting architecture of Release 5.5. These include:

- Scheduling of individual reports in HTML interface.
- Scheduling of repeating reports in HTML interface.
- Configuration of notifications for reports in HTML interface.
- Ability to specify report field dependencies in the HTML interface.

With Release 6.0, all report functionality can be accessed from the HTML interface.

### **Extensions**

Mercury Extensions simplify the complex activities required to maintain large enterprise applications such as Oracle, PeopleSoft, SAP, and Siebel, as well as Web applications built using Java, Oracle, and other means. These applications are constantly changing as new modules are added, customizations are developed, configurations are modified, and patches are applied. The changes must be executed precisely across the Development, Test, Stage, and Production system landscape, usually by highly paid and hard-to-find specialists. Mercury Extensions automate these precise tasks using best practice processes designed specifically for each application.

Mercury IT Governance Center 6.0 includes several enhancements to these Extensions. Please contact Mercury for specifics.

### **Summary**

While the improvements in Mercury IT Governance Center 6.0 address many different functions within IT, they share a common goal: making it easier to run IT as a business. Just as disparate financial systems have given way to enterprise resource planning (ERP), so too are CIOs discovering the advantage of a single system of record for all IT transactions. Mercury IT Governance Center 6.0 is that system: a real-world application that can be implemented in stages, starting with the biggest pain points and building out to optimize the way you govern and manage IT.

### **For More Information on Mercury IT Governance Center 6.0**

Please contact your Mercury Account Manager.

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**MERCURY**<sup>™</sup>

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