



Mercury IT Governance Center™
**Mercury Performance Center
Management™ Guide**

Version: 1.0



MERCURY™

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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

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

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Chapter 1 Introduction

In This Chapter:

- *About This Document*
 - *Who Should Read This Document*
 - *Related Documents*
 - *Overview of Mercury Performance Center Management*
-

About This Document

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

This document describes Mercury Performance Center Management. The chapters address the following topics:

- [Chapter 1, *Introduction*, on page 11](#)

Includes an overview of Mercury Performance Center Management and details the document's intended audience and related guides.
- [Chapter 2, *Installing Mercury Performance Center Management*, on page 21](#)

Details the system requirements and installation procedure for Mercury Performance Center Management.
- [Chapter 3, *Setting Up Mercury Performance Center Management*, on page 25](#)

Discusses the initial setup tasks that must be completed before using Mercury Performance Center Management.
- [Chapter 4, *Submitting Requests from Lines of Business*, on page 47](#)

Discusses how users in lines of business (LOB) submit requests to the performance CoE.
- [Chapter 5, *Capturing Demand from Lines of Business*, on page 57](#)

Discusses how members of the performance CoE capture incoming demand from LOBs.
- [Chapter 6, *Creating and Managing Projects*, on page 61](#)

Discusses the creation and management of performance delivery and management projects in the performance CoE.
- [Chapter 7, *Training Center of Excellence Personnel*, on page 97](#)

Discusses course creation and training for members of the performance CoE.
- [Chapter 8, *Handling Administrative Activity*, on page 115](#)

Discusses administrative activities related to the performance CoE.

Who Should Read This Document

This document is for the following audience types and assumes that the reader has some basic understanding of Mercury Performance Center™ and CoE-related concepts.

- Application developers and configurators for Mercury Performance Center and Mercury IT Governance Center
- End users associated with the following business roles in a CoE:
 - Operator
 - Project manager
 - Project engineer
 - Specialist
 - Technical account manager
 - Engagement manager
 - Solution architect
 - Sales
 - Support
 - Certification manager
 - Certification trainer
- End users associated with the following business roles as customers of a CoE, or members of a line of business (LOB):
 - Project manager
 - Project engineer
 - User

For More Information

For information about audience types, see the *Guide to Documentation* for Mercury IT Governance Center.

Related Documents

Mercury Performance Center Management uses the software and features of Mercury IT Governance Center.

Documents within the IT Governance suite that provide information relevant to administrators and configurators include:

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

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

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

Supplemental documentation includes:

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

For More Information

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

Overview of Mercury Performance Center Management

Mercury Performance Center Management Mercury uses the technology and features of Mercury IT Governance Center to optimize the management of performance centers of excellence (CoE) by introducing repeatable best-practice projects and workflows for principal CoE activities.

Users of Mercury Performance Center Management, particularly project managers within a Center of Excellence, can:

- Capture demand from different lines of business (LOB)
- Route demand through appropriate approval and review channels
- Introduce and enforce consistent workflow for performing load tests
- Create and monitor project plans
- Plan and allocate project resources
- Report actual time spent on a project (for back-billing)
- Create dashboard views for all CoE operations

CoE administrators can:

- Manage infrastructure issues
- Provision infrastructure for performance testing and application monitoring
- Manage and administer accounts

Lines of Business (LOBs) and customers of the Center of Excellence can track the progress of their performance projects and any related requests to the CoE.

Capturing and Tracking Demand

Users in an LOB can use pre-configured Mercury Performance Center Management requests to streamline and automate initiation of performance CoE projects, while CoE project managers and engineers can track and handle project activities as they are executed.

Submitting a Request from a Line of Business

Users in an LOB can submit project initiation requests to the performance CoE. Project initiation requests follow a specific, pre-built workflow supplied with Mercury Performance Center Management, gathering the appropriate reviews and approvals from all necessary roles. Depending on the outcome of

this approval process, a performance delivery or performance management project is then created by the performance CoE. *Figure 1-1* shows a project initiation request being created.

Create New COE - Initiate Project Request

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form for requests for service (ie. new projects, requests, etc.) from the CoE delivery team.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Created By: Mark Sage Workflow Status: New

Contact Name: * Contact Phone: * Priority: Medium

Contact Email: *

Company: *

Department: *

Figure 1-1. Creating a project initiation request

Users in an LOB can also submit support requests relating to Mercury Performance Center for consideration by the performance CoE. These support requests follow their own pre-built workflow toward resolution. LOB users can view submitted support requests through their Mercury IT Governance Dashboard™ for tracking and review purposes.

Managing CoE Demand

Incoming project initiation requests are handled by appropriate members of the performance CoE and routed to other CoE personnel for reviews and approvals as the project initiation workflow dictates. Once the workflow completes, the proper CoE manager can create a performance delivery or performance management project, leveraging Mercury Project Management™ for resource and task planning and costing. Using portlets on their Dashboards, CoE managers can get a real-time view of proposed and in-flight performance-related projects and related metrics. *Figure 1-2* shows one such portlet that displays relevant statistics for projects in flight.

Project Type Δ	Total (#)	Average Value Rating	Average Risk Rating	Average Visibility Rating	Overall Status Green	Overall Status Yellow	Overall Status Red	Overall Status Undefined
Total	9	4	4	4	6 ■	2 ■	0 ■	1
Application Management	2	4	4	5	1 ■	1 ■	0 ■	0
Capacity Planning	1	2	2	1	1 ■	0 ■	0 ■	0
Performance Optimization	4	4	4	5	3 ■	0 ■	0 ■	1
Performance Validation	2	4	4	4	1 ■	1 ■	0 ■	0

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Figure 1-2. CoE - Delivery - Project Statistics portlet

Incoming performance CoE-related support requests are also run through the CoE in a similar process of reviews and approvals as the support workflow dictates. These requests are also visible to the correct roles through portlets distributed to the appropriate users' Dashboards.

Creating and Managing Projects

After a project initiation request has been approved, a CoE project manager can create a performance delivery or performance management project using Mercury Performance Center Management's pre-built project requests, which integrate with project plans created in Mercury Project Management for high-level visibility. Depending on the nature of the project, the CoE project manager can use a pre-built performance CoE project template as a starting point. The project plan captures the task hierarchy and schedule, and also helps the manager to locate and assign resources. The project plan is then linked to its project request in Mercury Performance Center Management.

As project engineers and other assigned resources complete tasks, Mercury Project Management can track time and project schedule performance automatically. *Figure 1-3* shows the Project Overview page for an in-flight project.

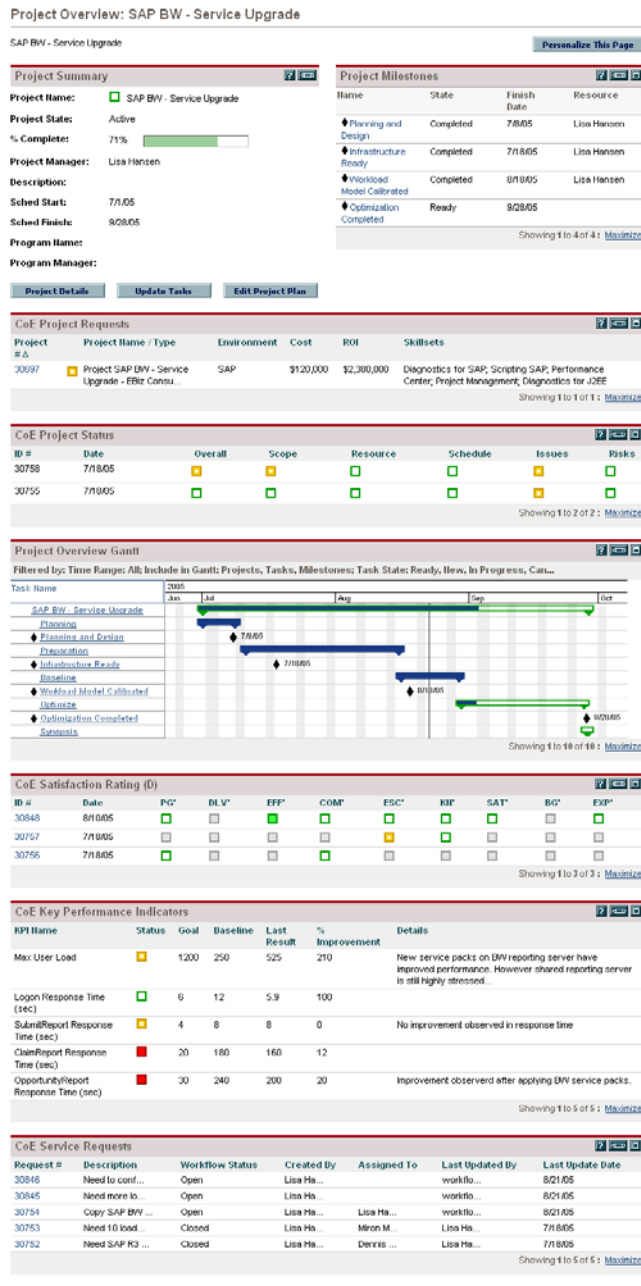


Figure 1-3. Project Overview page

Mercury Time Management™ can also be leveraged if a more granular approach to time tracking is required. Project-related metrics can be tracked by appropriate CoE members through portlets distributed to certain CoE roles.

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

Training and Certification

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

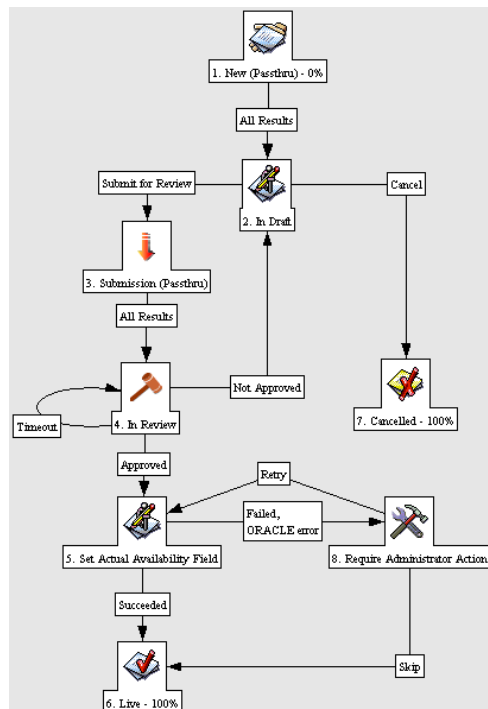


Figure 1-4. Certification course definition workflow

A training and certification request can be submitted for a CoE member, following its own pre-defined workflow to ensure that the user completes the necessary activities for the specified course. Training activity is also visible through role-specific portlets distributed to the appropriate CoE members' Dashboards.

CoE Administration

Mercury Performance Center Management includes request types and workflows centered around activities relating to the administration of the CoE itself, including:

- Account setup
- Mercury Performance Center provisioning
- Mercury Business Availability Center provisioning
- IT service

Appropriate CoE users can submit, view, and approve these requests as their workflows dictate. Administration request activity can be viewed through portlets distributed to the proper roles. *Figure 1-5* shows the portlet used to track open IT service requests.

Req # Δ	Category	Description	Workflow Status	Assigned To	Priority	Created By	Created On	Last Updated By	Last Updated
30754	Performance Center	Copy SAP BW data from production to test instance	Open	Lisa Hansen	Medium	Lisa Hansen	7/18/05	workflow timeout service	8/15/05
30845	Performance Center	Need more load generators for running SAP GUI vusers	Open		Medium	Lisa Hansen	8/3/05	workflow timeout service	8/17/05

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Figure 1-5. CoE - IT Service - Open IT Service Requests portlet

Chapter

2

Installing Mercury Performance Center Management

In This Chapter:

- *System Requirements*
 - *Installing Mercury Performance Center Management*
-

System Requirements

To use Mercury Performance Center Management, you must have Release 6.0 (Service Pack 4 or later) of Mercury IT Governance Center installed. [Table 2-1](#) lists the hardware requirements for installation.

Table 2-1. Hardware requirements for installation

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

Installing Mercury Performance Center Management

To install Mercury Performance Center Management:

1. Be sure Mercury IT Governance Center is running in restricted mode by running the script:

```
sh setServerMode.sh -Restricted
```

2. Be sure you have downloaded the proper bundle:

```
mitg-600-CoEMgmtADAM.jar
```

3. Copy the `mitg-600-CoEMgmtADAM.jar` file to the `<ITG_Home>` directory.



You do not need to unpack the installation file. The installation process automatically unpacks it.

4. Navigate to the `ITG_Home/bin` directory.

5. Run the script:

```
sh kDeploy.sh -i CoEMgmtADAM
```

6. As `kDeploy.sh` runs, respond to prompts.

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

```
Deployment CoEMgmtADAM has been successfully installed. Using  
a Web browser, view and check the installation summary  
report, which is located in:
```

```
ITG_Home/logs/deploy/600/CoEMgmtADAM/log_x/installLog.html
```

where `log_x` is a random number generated by `kDeploy.sh` to make each log file name unique. The number increments by one each time the installation script is run, so the log file for the most recent run is the one with the highest log number.

The summary report lists all Mercury entities installed as part of the installation process.

Each entity that was installed correctly is marked as “Completed.” If there is an error for a particular entity, the report contains a direct link to another log file (HTML page) with additional information.

Correct the errors, if necessary, and repeat the installation procedure.

7. Compile the new JSP files using the command:

```
sh kJSPCompiler.sh
```

8. Stop and restart Mercury IT Governance Center in normal mode, as follows:

- a. Stop the Mercury IT Governance Server.
- b. Run the script:

```
setServerMode.sh NORMAL
```

For more information about this script, see the *System Administration Guide and Reference*.

9. Start the Mercury IT Governance Server.

Chapter

3

Setting Up Mercury Performance Center Management

In This Chapter:

- *Overview of Setting Up Mercury Performance Center Management*
 - *Tailoring Field Values*
 - *Key Validations for Mercury Performance Center Management*
 - *Creating User Accounts*
 - *Creating a New User*
 - *Linking Users to Security Groups*
 - *Configuring User Resource Information*
 - *Configuring Time Management Settings*
 - *Setting Up Contact Information*
 - *Distributing Dashboard Modules to Users by Role*
 - *Customizing Notifications Through server.conf*
 - *Customizing Mercury Performance Center Management Entities*
-

Overview of Setting Up Mercury Performance Center Management

Once Mercury Performance Center Management has been successfully installed, a few things need to be configured in order for you to fully take advantage of its functionality.

- Certain fields on the Mercury Performance Center Management requests (such as Company and Department) contain generic values and should be tailored to fit your particular organization.
- User accounts need to be created for each Center of Excellence (CoE) member in Mercury IT Governance Center. These users should then be associated with a security group corresponding to their role in the performance CoE.
- Mercury Performance Center Management requests can trigger email notifications to be sent to specific users at certain points along their workflows. These email notifications contain variables, such as the name of your IT/administrative center or the name of the team responsible for training and certification. These variables are defined in the `server.conf` file and should be modified to fit your organizational naming scheme.

While the request types, workflows, and project templates delivered as part of Mercury Performance Center Management are ready to use immediately after installation and system-level configuration, they can also be further configured to fit your business needs if you find it necessary.



After checking with other business units who may be using Mercury IT Governance Center, you can disable any request types, workflows, and other entities that are not being used or are inappropriate for the performance CoE. This can simplify the user experience for performance CoE users and customers.

Tailoring Field Values

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



In general, only validations whose descriptions begin with “(Customizable)” should be considered for alteration. Any validations whose prefixes begin with something else must not be changed in order for Mercury Performance Center Management to function properly.

For example, validations with Descriptions beginning with the following must be left alone:

- (Static)
- (Autocomplete)
- (Workflow)

The Department field on Mercury Performance Center Management request types is an example of a static list validation, which provides a static list of options to the user. A static list validation can be a drop-down or an auto-complete list component.

To add values to the validation list:

1. Log on to Mercury IT Governance Center and open the Workbench.
2. In the shortcut bar, click **Configuration > Validations**.
3. In the **Query** tab of the Validation Workbench window, click **List**.

The **Results** tab opens, displaying the results of the search.

4. Select **KNTA - Department - Enabled** and click **Open**.

The Validation window opens with the Department field’s validation loaded.

5. Click **New**.

The Add Validation Value window opens.

6. Enter information for the validation value as described in the following table.

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

7. (Optional) Set the validation value as the default by checking the Default field.

The default option is only available for drop-down lists.

8. Click **OK** to close the window and add the value to the validation. Click **Add** to add the value and keep the Add Validation Value window open.

Validation values can be re-ordered using the up and down arrow buttons. The sequence of the validation values determines the order that the values are displayed in the list.

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



Note

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



Note

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

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

Key Validations for Mercury Performance Center Management

Table 3-1 discusses the specifics of modifying certain key validations for Mercury Performance Center Management.

Table 3-1. Information for altering specific request types and validations

Request Type	Field	Discussion
Support Request	Category	Validation: COE_CSR_SUPPORT_CATEGORY
	Subcategory	The name of this validation is based on the Code field of the selected Category (refer to the COE_CSR_SUPPORT_CATEGORY validation).
	Topic	The name of this validation is based on the Code field of the selected Subcategory.
IT Service Request	Category	Validation: COE_CSR_ITSERVICE_CATEGORY
	Subcategory	The name of this validation is based on the Code field of the selected Category (refer to the COE_CSR_ITSERVICE_CATEGORY validation).
	Topic	The name of this validation is based on the Code field of the selected Subcategory.
Knowledge Base Article	Category	Validation: COE_MSC_KB_CATEGORY
	Subcategory	The name of this validation is based on the Code field of the selected Category (refer to the COE_MSC_KB_CATEGORY validation).
	Topic	The name of this validation is based on the Code field of the selected Subcategory.
Performance Delivery Project (PDP)	Project Class	COE_CMN_DDL_PROJECTCLASS
	Project Type	COE_CMN_DDL_PROJECTCLASS Note: The Code for each value must start with “PC”.
	Project Phase	COE_CMN_DDL_PROJECT_PHASE_PDP

Table 3-1. Information for altering specific request types and validations

Request Type	Field	Discussion
Performance Management Project (PMP)	Project Class	COE_CMN_DDL_PROJECTCLASS
	Project Type	COE_CMN_DDL_PROJECTCLASS Note: The Code for each value must start with "PC".
	Project Phase	COE_CMN_DDL_PROJECT_PHASE_PMP

Creating User Accounts

Each member of the performance CoE must be defined as a user in Mercury IT Governance Center. The general procedure is given in the following sections:

- [Creating a New User](#)
- [Linking Users to Security Groups](#)
- [Configuring User Resource Information](#)
- [Configuring Time Management Settings](#)
- [Setting Up Contact Information](#)
- [Distributing Dashboard Modules to Users by Role](#)

Creating a New User

To create a new user:

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

See [Tailoring Field Values on page 26](#) for detailed instructions on altering validations.

2. Log on to Mercury IT Governance Center and open the Workbench.
3. In the shortcut bar, click **Sys Admin > Users**.

The User Workbench opens.

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

The User window opens.

The screenshot shows a dialog box titled "User : Untitled1" with several tabs. The "User Information" tab is selected, displaying fields for Username, Company, First Name, Last Name, Email Address, and Phone Number. Below these is the "Authentication" section, which includes a dropdown for "Authentication Mode" (set to ITG), a "Password" field, and date fields for "Start Date" (November 8, 2004), "End Date", "Last Login", and "Password Exp. Date" (November 8, 2004). There are also radio buttons for "New password on login" (Yes/No) and checkboxes for "System Level Licenses" (Configuration and User Administration) and "Application Licenses" (Change Management, Demand Management, Portfolio Management, Program Management, Project Management, and Time Management). At the bottom, there are buttons for "Edit Resource", "Time Management Settings", "OK", "Save", and "Cancel".

5. Enter the following required information: Username, First Name, and Last Name.

The username must be unique in Mercury IT Governance Center.

6. Enter the general information in the appropriate fields.

Refer to [Table 3-2](#) for a detailed description of each field on the **User Information** tab.

7. Create a password for the user.

- a. Click the button to the right of the required Password field.

The Enter or Change Password window opens.

- b. Enter a password in the Enter New Password field, and confirm in the Confirm New Password field.

This password is encrypted both in the user interface and the database.

- c. Click **OK** to close the window.
8. Specify when the password will expire using either of the following methods:
 - Select **Yes** for New password on login to force the user to reset the password.
 - Use the Password Exp. Days field to specify the number of days that a user has to change the password. When a value is entered in this field, the Password Exp. Date field is automatically updated.
9. Select a method for the user's authentication from the Authentication Mode field.

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

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

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

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

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

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

12. In the **Security Groups** tab, link the desired security groups to the user to specify the user’s functional roles and access grants. See [Linking Users to Security Groups on page 35](#) for instructions.
13. In the **Ownership Groups** tab, select the ownership groups who will have the right to edit, copy or disable this user. See the “Configuration Security” chapter of the *Security Model Guide and Reference* for details on ownership groups.
14. Click **OK**.

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

Table 3-2. User window: User Information tab fields (Sheet 1 of 3)

Fields	Definition
Username	Unique name for a user’s account. The name entered to log onto Mercury IT Governance Center.
Company	The company the user works for. The values in this auto-complete list are set by the following validation: CRT - Company.
First Name	The first name of the specified user.
Last Name	The last name of the specified user.
Email Address	The email address for a user. This address is referenced in other portions of the application and should be formatted as name@domain.com.
Phone Number	The phone number for the user.
Authentication Mode	A list of the methods available for authentication. Possible values are ITG , LDAP , NTLM , and SITEMINDER . If ITG is chosen, then authentication is performed using the internal User Database of Mercury IT Governance Center. If another authentication mode is chosen, authentication is performed using the enterprise directory database server. See the <i>Open Interface Guide and Reference</i> for details.
Start Date	The date when a user account becomes activated.
End Date	The date on which a user account becomes disabled. You can leave this field blank to indicate no end date.

Table 3-2. User window: User Information tab fields (Sheet 2 of 3)

Fields	Definition
Last Login	The date of a user's last system logon. This date is deleted based on a parameter in the server.conf file, DAYS_TO_KEEP_LOGON_ATTEMPT_ROWS. The default value for this parameter is 14 days. If there is no value in the Last Login field, the user has not logged in for at least 14 days (assuming the parameter has not been changed from the default to another value). See the <i>System Administration Guide and Reference</i> for server.conf parameter details.
Domain	Used only when using NTLM authentication. This can be set in the <ITG_HOME>/integration/ntlm/ntlm.conf file.
Password	The user's password. Administrators can set restrictions on the password format: minimum length, required special characters, etc. These restrictions are specified in the server.conf file on the Mercury IT Governance Center Server. See the <i>System Administration Guide and Reference</i> for server.conf parameter details.
New Password on Logon	Setting to determine whether to ask a user to enter a new password the next time they logon.
Password Exp. Days	The number of days before a user's password expires. The first time a user logs on after the password expiration date, he will be prompted to enter a new password.
Password Exp. Date	The date on which a user's password expires. The value in this non-updateable field is calculated by the Password Expiration Days attribute or the Ask New Password On Logon attribute.
Configuration	Selecting this option provides this user with access to all functionality for the products licensed at your site, including configuration interfaces for all Mercury IT Governance entities (for example, object types, request types, workflows, and validations) except users and security groups.
User Administration	The User Administration license is required to configure user accounts and security groups.
Change Management	The Change Management license provides access to all product functionality available through the Workbench interface and additional access to advanced HTML interface functions. Users that do not have this box checked will not see the Change Mgmt screen group or associated menus.
Demand Management	The Demand Management license provides access to all product functionality. Users that do not have this box checked will not see the Demand Mgmt screen group or associated menus.

Table 3-2. User window: User Information tab fields (Sheet 3 of 3)

Fields	Definition
Portfolio Management	The Portfolio Management license provides access to Portfolio Management functionality, and must be used in conjunction with a Demand Management license. Users that do not have this box checked will not see the related menus and can not access the functionality.
Program Management	Select the Program Management license to enable user access to Program Management functions, and must be used in conjunction with a Demand Management and Project Management license. Users that do not have this box checked will not see the related menus and can not access the functionality.
Project Management	The Project Management license provides access to all Project, Resource, and Financial Management functionality available through the Workbench interface and additional access to advanced HTML interface functions. Users that do not have this box checked will not see the Project Mgmt screen group or associated menus.
Time Management	Select Time Management license to enable user access to Time Management functions in Mercury IT Governance Center. Users that do not have this box checked will not see the related menus and can not access the functionality.
Edit Resource	Each user also has associated resource settings such as Title, Direct Manager, and Capacity. Click this button to view or edit the resource settings associated with the user.
Time Management Settings	If Time Management is licensed for a particular user, click this button to configure their time management settings. This includes defining the period type and time sheet approvers.

Linking Users to Security Groups

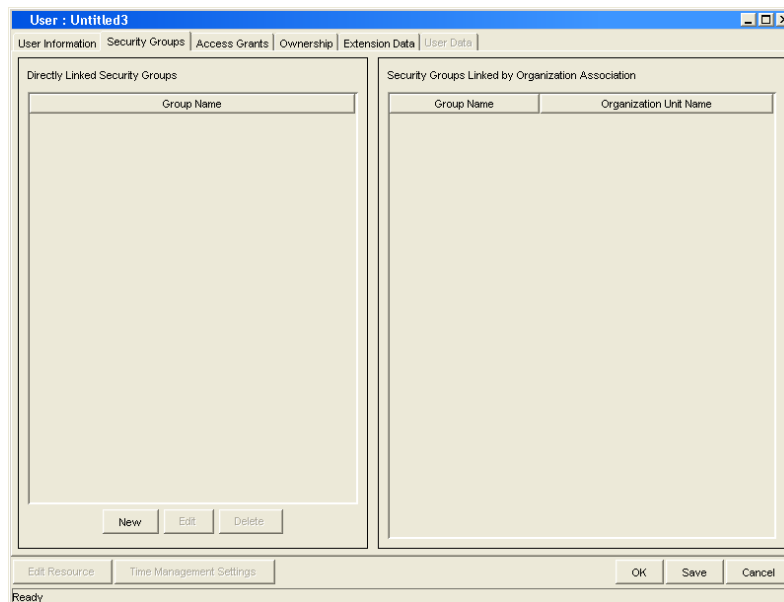
Users can be linked to security groups through the **Security Groups** tab of the User window. Users can also be linked to security groups through an organization model defined in Mercury IT Governance Center. Users of Mercury Performance Center Management must be linked to at least one of the security groups as described in [Table 3-3](#).

Table 3-3. Required security groups

Security Group	User
CoE ALL USERS	All users of Mercury Performance Center Management
CoE CORE USERS	Members of the performance CoE
CoE CUSTOMER USERS	LOB users of Mercury Performance Center Management

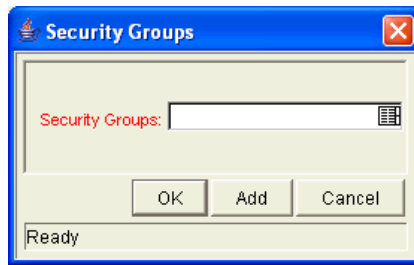
To link a user to a security group using the User window:

1. Open the User window.
2. Click the **Security Groups** tab.

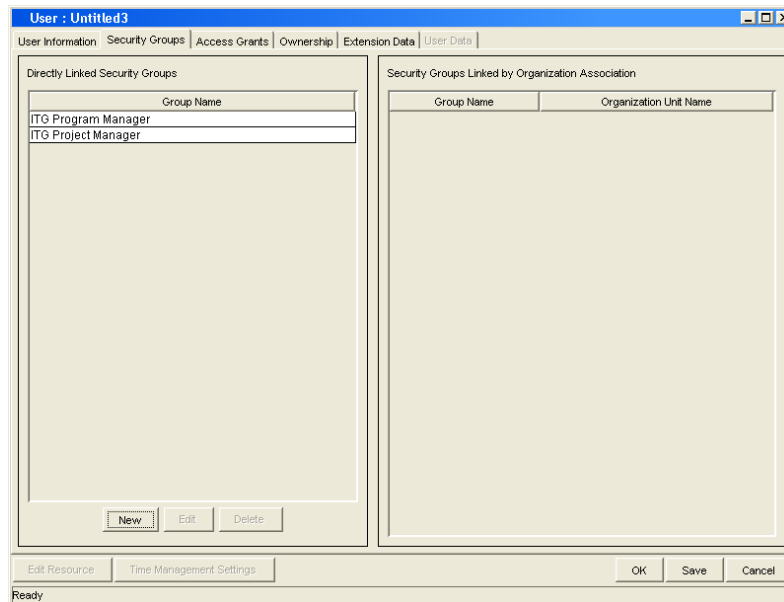


3. Click **New**.

The Security Groups window opens.



4. From the Security Groups field, select the security groups that you would like to link to the user.
5. Click **OK** to add the list of security groups to the User window.



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



Note

If the user is associated with an organization unit (defined in the Mercury Resource Management™ functionality), he may inherit security group associations. These security groups will be listed in the **Security Groups** tab in the Security Groups Linked by Organization Association list.

See the *Mercury Resource Management User's Guide* for details.

Mercury Performance Center Management Security Groups

Mercury Performance Center Management delivers several security groups that correspond to roles in the performance CoE and LOBs. Each group has its own permissions and access grants, allowing users in different roles to see different sets of information relating to the performance CoE.

Users of Mercury Performance Center Management should be members of at least one of the security groups in [Table 3-4](#) below, as well as at least one of the groups in [Table 3-3](#).

Table 3-4. Security groups and roles (Sheet 1 of 3)

Security Group/Role	Description	License
CoE Manager	Responsible for managing the performance CoE.	PM, DM, TM
Delivery Roles		
CoE Operator	Responsible for managing logistics for the delivery team, and ensures that project and service requests are handled by the appropriate personnel (such as project manager or solution architect).	PM, DM, TM
CoE Project Manager	Responsible for coordinating a set of activities that constitute an performance delivery or management project.	PM, DM, TM
CoE Project Engineer	Responsible for delivering on the set objectives and tasks of the project. The engineering resource is responsible for scripting, diagnostics, and any technical activity related to the project.	PM, DM, TM
CoE Specialists	Provides subject matter and domain expertise in specific areas related to the projects (such as DB Specialist, Performance Expert, Technical Architect, or Developer).	PM, DM, TM
CoE Technical Account Manager	Serves as the key point of contact between the Line of Business owners and the Center of Excellence teams. Handles most of the communications between the two parties until a course of action has been determined. The individual also takes the responsibilities of a project manager.	PM, DM, TM

Table 3-4. Security groups and roles (Sheet 2 of 3)

Security Group/Role	Description	License
CoE Engagement Manager	Generally a non-technical high-level account manager that manages relationship with multiple LOBs within an account and across multiple Centers (such as PC, BAC, or QC).	PM, DM
CoE Solution Architect	Responsible for the general design of the solution or offering rendered to the Line of Business (LOB). The solution architect is responsible for mapping the LOB's high-level service requests to specific projects (performance delivery or management projects).	PM, DM
CoE Sales	Responsible for promoting the services of the Center of Excellence and channeling new projects and opportunities.	PM, DM
Support Roles		
CoE Support Tier 1	The first line of application support for Performance Center, Business Availability Center, or IT Governance Center. Issues are generally focused on usability and functionality of application.	DM
CoE Support Tier 2	Responsible for providing top-tier support for applications, and assisting in escalation of support issues.	DM
Administrative Roles		
CoE Administrative Manager	The administrative manager of CoE infrastructure and application	DM
CoE Product Administrator	Responsible for the installation, administration, and ongoing maintenance of the Performance or Business Availability Center application. This may include tasks such as user management, upgrades, report generation, or customization.	DM
CoE System Administrator	Maintains the Performance or Business Availability Center servers; installs operating system patches and updates.	DM

Table 3-4. Security groups and roles (Sheet 3 of 3)

Security Group/Role	Description	License
CoE ITG Administrator	Responsible for the installation, administration, and ongoing maintenance of the IT Governance Center application. This may include tasks such as user management, upgrades, report generation, customization, etc. NOTE: The CoE ITG Administrator must also belong to the "ITG Administrator" security group.	PM, DM, C, U
Training and Certification Roles		
CoE Certification Manager	Manages and approves all certification courses and knowledge base content, and responsible for establish methodology, processes, and practice.	DM
CoE Certification Trainer	Responsible for developing courseware and mentoring CoE personnel on required skillsets. The trainer also approves content for the Center's knowledge base.	DM
LOB/Customer Roles		
CoE Customer - Project Manager	Represents the project manager or sponsor of the project from the Line of Business (or customer-end). The LOB project manager has the right to request new projects.	DM
CoE Customer - Project Engineer	Represents an engineering resource (such as a scripter, tester, performance/business analyst) from the LOB. The engineer has very limited access to the IT Governance Center system, but can file requests for application support services.	DM
CoE Customer - User	Represents personnel from the LOB, and has very limited support access.	DM
Licenses: <ul style="list-style-type: none"> • PM: Project Management • DM: Demand Management • TM: Time Management • C: Configuration • U: User Administration 		

Configuring User Resource Information

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

- **Skills.** The main duties or abilities of the user (such as DBA or Programmer).
- **Cost Rate.** The hourly cost associated with a resource or skill, which represents the charge-back or billed cost of their labor.
- **Workload Capacity.** A percentage that indicates what portion of a resource's working day is available for planned workload items. For instance, a particular DBA may have a lot of meetings every day, and therefore is set to devote 80% of her capacity to workload items.

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

Configuring Time Management Settings

If you are using Mercury Time Management™, there are settings for each user that can be configured to enable a user to enter time quickly and accurately. For information on these settings and how to change them, see the “Maintaining Resources” chapter of the *Mercury Time Management Configuration Guide*.

Setting Up Contact Information

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

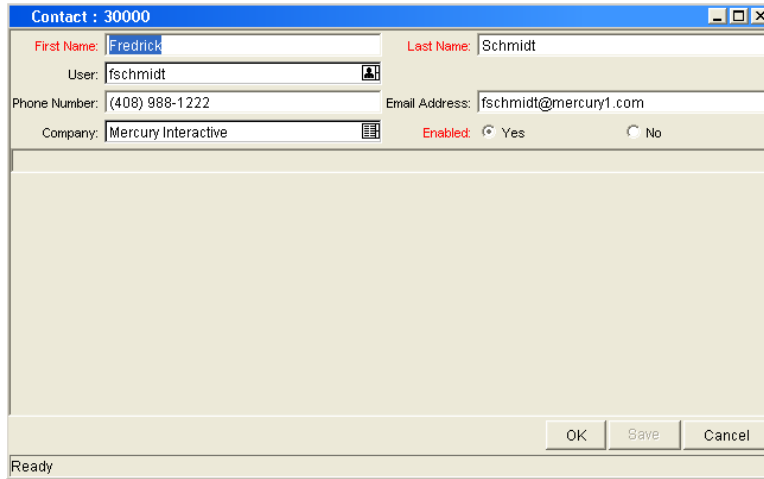
To create a contact:

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

The Contacts Workbench opens.

3. In the Contacts Workbench, click **New Contact**.

The Contact window opens.



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

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

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

The contact information is saved.

Distributing Dashboard Modules to Users by Role

Mercury Performance Center Management comes with several Dashboard modules (one for each role) that include sets of portlets useful to that particular role. These modules can be distributed to these users according to their security groups, which correspond to their roles, or simply made available for them to add themselves. For detailed instructions on distributing Dashboard modules, see the “Distributing Modules” chapter in the *Configuring the Standard Interface* guide.

Customizing Notifications Through server.conf

Mercury Performance Center Management uses Mercury IT Governance Center technology to send email notifications to performance CoE and LOB users when certain workflow events occur during the resolution of their requests. These notifications contain constants that are defined in the `server.conf` file and should be modified to include names and identifiers from your organizational naming scheme. These parameters are listed in [Table 3-5](#). For detailed instructions on modifying the `server.conf` file, see the “Server Configuration Parameters” appendix in the *System Administration Guide and Reference*.

Table 3-5. Mercury Performance Center Management server.conf parameters (Sheet 1 of 3)

Parameter	Description	Sample Values
General Parameters		
CoE_NAME	Name of Center of Excellence	Center Of Excellence
CoE_VERSION	Version of Center of Excellence Package	1.0
CoE_DELIVERY_CENTER	Name of Center of Excellence's delivery center or division	CoE Service Center
CoE_DELIVERY_TEAM	Name of Center of Excellence's delivery team	Center of Excellence Service Team

Table 3-5. Mercury Performance Center Management server.conf parameters (Sheet 2 of 3)

Parameter	Description	Sample Values
CoE_DELIVERY_MANAGEMENT	Name of Center of Excellence management	Center of Excellence Management
Center Support Parameters		
CoE_SUPPORT_REQUEST_ID	Support request identifier (CSR, SR, etc.)	CSR
CoE_SUPPORT_CENTER	Name of product support center or division	CoE Support Center
CoE_SUPPORT_TEAM	Name of product support team	Center of Excellence Support Team
Administration Parameters		
CoE_ITSUPPORT_REQUEST_ID	IT/Administrative Service request identifier (ASR, SR, etc.)	ASR
CoE_ITSUPPORT_CENTER	Name of IT/Administrative center or division	CoE Admin Center
CoE_ITSUPPORT_TEAM	Name of IT/Administrative team	Center of Excellence Administrative Team
Training and Certification Parameters		
CoE_KB_REQUEST_ID	Knowledge base article identifier	KB
CoE_TRAINING_CERTIFICATION_REQUEST_ID	Training and certification request identifier	TCR
CoE_COURSE_DEFINITION_REQUEST_ID	Training and certification course definition identifier	CDR
CoE_CERTIFICATION_CENTER	Name of Training and Certification center or division	CoE Knowledge Center
CoE_CERTIFICATION_TEAM	Name of Training and Certification team	Center of Excellence Certification Team
Service Delivery Parameters		
CoE_PROJECT_REQUEST_ID	Project request identifier	PR

Table 3-5. Mercury Performance Center Management server.conf parameters (Sheet 3 of 3)

Parameter	Description	Sample Values
CoE_SCRIPT_REQUEST_ID	Scripting request identifier (SCR, SR, etc.)	SCR
CoE_SURVEY_REQUEST_ID	Customer Satisfaction Survey request identifier (CSS, CS, etc.)	CSS
CoE_STATUS_UPDATE_ID	Project status update request identifier (SU, PSU, etc.)	SU

Customizing Mercury Performance Center Management Entities

Mercury Performance Center provides request types, workflows, portlets, Dashboard modules, and project templates delivered as pre-built best-practice content. These entities can be used immediately after you have finished making the preceding configurations to Mercury Performance Center.

If you find it necessary to modify these entities to suit your pre-existing business practices, [Table 3-6](#) lists the Mercury Performance Center Management entities and the corresponding Mercury IT Governance Center configuration guides you should read in order to properly adjust them.

Table 3-6. Mercury IT Governance entities and configuration guides

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

Chapter

4

Submitting Requests from Lines of Business

In This Chapter:

- *Overview of Submitting Requests from Lines of Business*
 - *Initiating Project Requests*
 - *Viewing and Tracking Project Initiation Requests*
 - *Filing Support Requests*
 - *Viewing and Tracking Support Requests*
-

Overview of Submitting Requests from Lines of Business

Users in a line of business (LOB) may require services from the performance Center of Excellence (CoE). These users are considered customers of the CoE. Customer users can submit requests to the CoE for the following activities:

- **Project initiation.** A customer of the CoE can request a load-testing project relating to performance delivery or management. Once the CoE receives and processes the project initiation request, the CoE handles subsequent project creation and execution.

For more information, see:

- [Chapter 5, *Capturing Demand from Lines of Business*, on page 57](#), for details on how the CoE captures incoming demand from LOBs
- [Chapter 6, *Creating and Managing Projects*, on page 61](#), for details on creating and managing projects within the CoE
- **Support.** A user in an LOB can request support from the CoE for application support relating to performance CoE domains. The CoE receives and processes these support requests like any other support organization, working with the customer to solve the problem and escalating to higher levels of expertise if needed.

Initiating Project Requests

A user in a line of business or member of the CoE on the behalf of a line of business may request to initiate a new project. This project initiation request contains high-level objectives and requirements for service from the CoE. As the request is passed through its workflow, gathering approvals and comments, the CoE solution architects or technical account managers translate the request into the appropriate project request, such as a performance delivery project, or performance management project.

The project initiation request follows the workflow pictured in [Figure 4-1](#) and described in [Table 4-1](#).

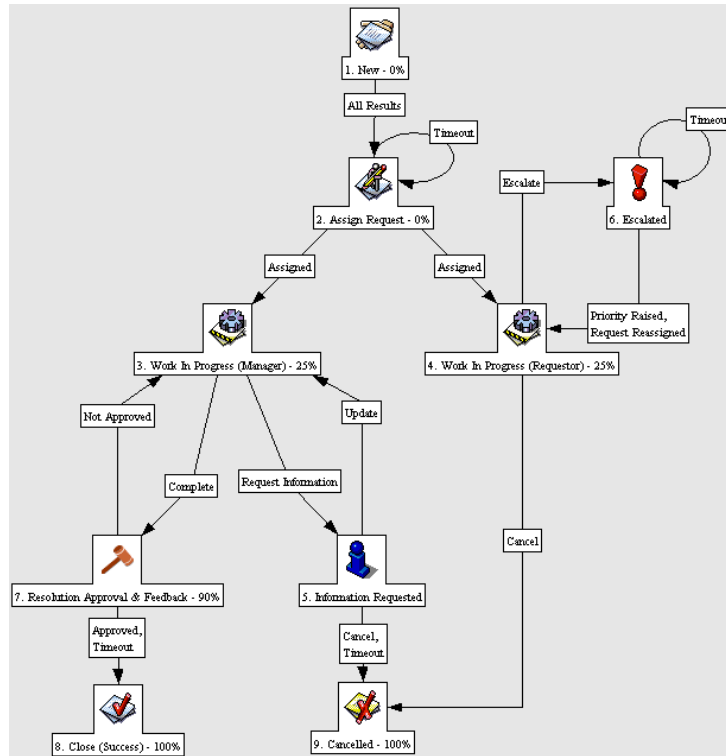


Figure 4-1. Project initiation request workflow

Table 4-1. Project initiation request workflow

Step	Description
New	A new request for initiating a project is created.
Assign Request	The request is assigned to appropriate personnel for handling the request. It is generally the responsibility of the CoE Operator to route any project requests to the appropriate personnel. A notification email is sent to CoE Manager and CoE Operator requesting for assignment of request.
Work In Progress (Manager)	The assigned project manager assesses the project objectives and requirements. Based on requirements, an appropriate Performance Delivery or Management project is created if applicable.
Work In Progress (Requestor)	The requestor is provided the opportunity to track the request and escalate if necessary.
Information Requested	Additional information is requested from the owner of the request. A notification email is sent to the requestor asking for additional information.

Table 4-1. Project initiation request workflow [continued]

Step	Description
Escalated	<p>The request has been escalated. It should be either reassigned or its priority raised, and appropriate action must be taken to expedite resolution for the request. Action should be taken by the administrative team.</p> <p>A notification email is sent to CoE Manager, CoE Operator, and assigned personnel requesting handling of request escalation.</p>
Resolution Approval & Feedback	<p>A resolution has been submitted, and is pending the requestor's approval and feedback. The requestor can complete the feedback section to provide service level metrics back to CoE management. If feedback is not provided within configured timeout interval (usually 14 days), the request is automatically closed.</p> <p>A notification email is sent to the requestor with the status of the request.</p>
Close (Success)	<p>The request has been completed.</p>
Cancelled	<p>The request was cancelled by the requestor, or the requestor was unresponsive to the demand for more information in order to properly process the request.</p>

If you are an LOB user, you can submit a project initiation request anytime.

To submit a project initiation request:

1. Log on to Mercury IT Governance Center.

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

2. From the menu bar, select **Center of Excellence > Project Requests > Initiate Project Request**.

The Create New Request page appears, displaying the appropriate project initiation request fields.

Create New COE - Initiate Project Request

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form for requests for service (ie. new projects, requests, etc.) from the CoE delivery team.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Created By: Mark Sage Workflow Status: New

Contact Name: * Contact Phone: * Priority: Medium

Company: * Contact Email: *

Department: *

3. In the Summary, Project Overview, and Business Case sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the project initiation request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



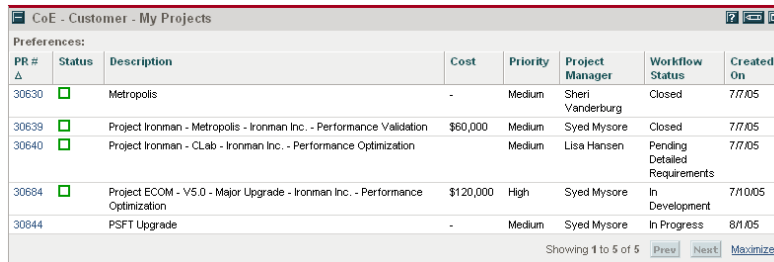
Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

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

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

Viewing and Tracking Project Initiation Requests

Once you have submitted a project initiation request, you can view it on your Dashboard. The CoE - Customer - My Projects portlet lists all of the project initiation requests you have submitted and displays the status of each in real time. [Figure 4-2](#) shows the CoE - Customer - My Projects portlet.



PR #	Status	Description	Cost	Priority	Project Manager	Workflow Status	Created On
30630	<input type="checkbox"/>	Metropolis	-	Medium	Sheri Vanderburg	Closed	7/7/05
30639	<input type="checkbox"/>	Project Ironman - Metropolis - Ironman Inc. - Performance Validation	\$60,000	Medium	Syed Mysore	Closed	7/7/05
30640	<input type="checkbox"/>	Project Ironman - CLab - Ironman Inc. - Performance Optimization		Medium	Lisa Hansen	Pending Detailed Requirements	7/7/05
30684	<input type="checkbox"/>	Project ECOM - V5.0 - Major Upgrade - Ironman Inc. - Performance Optimization	\$120,000	High	Syed Mysore	In Development	7/10/05
30844		PSFT Upgrade	-	Medium	Syed Mysore	In Progress	8/1/05

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

Figure 4-2. CoE - Customer - My Projects portlet

The CoE - Customer - My Projects portlet appears by default as part of the pre-configured Dashboard content available for all users in the role of CoE Customer - Project Manager (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone’s Dashboard individually.

Filing Support Requests

Support requests may be issued by any user for application support on Mercury Performance Center, Business Availability Center, or IT Governance Center. These requests are generally around application usability and support, and are handled by the CoE’s support engineers. Feedback provided by the requestor upon completion of the support request is channeled to the CoE manager in order to ensure that support services are being handled effectively.

Support requests follow the workflow pictured in [Figure 4-3](#) and described in [Table 4-2](#).

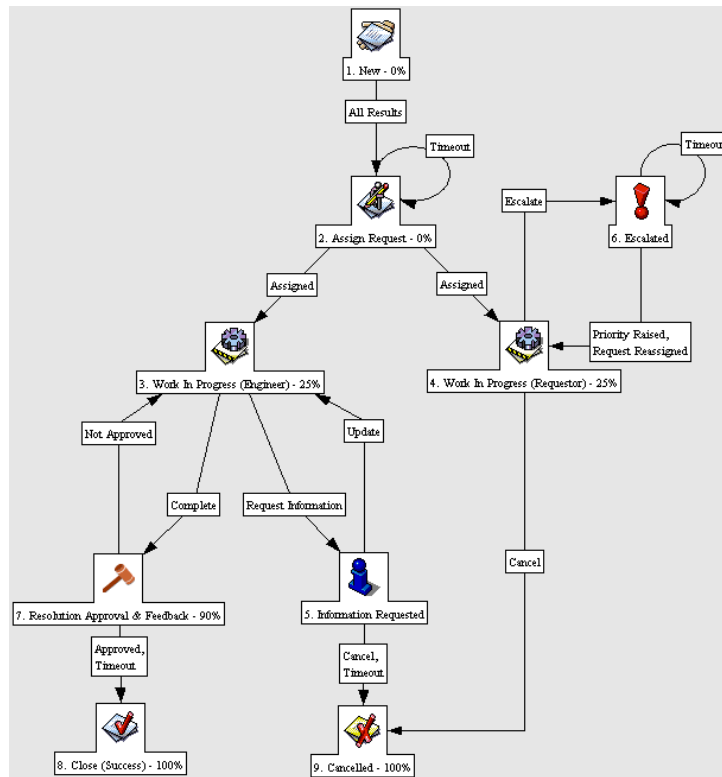


Figure 4-3. Support request workflow

Table 4-2. Support request workflow

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

Table 4-2. Support request workflow [continued]

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

If you are an LOB user, you can submit a support request anytime.

To submit a support request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Service Requests > Support Request.**

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

Create New COE - Support Request

Expand All Collapse All Submit Cancel

Header

Instructions

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

General Information

Request Status: New

Created By: Mark Sage Priority: Medium

Requested For: Contact Phone: Contact Email:

Company: Department:

CC List:

3. In the General Information, Project Reference, and Request Details sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the support request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Viewing and Tracking Support Requests

Once you have submitted a support request, you can view it on your Dashboard. The CoE - Customer - My Requests portlet lists all of the support requests you have submitted and displays the status of each in real time.

The CoE - Customer - My Requests portlet appears by default as part of the pre-configured Dashboard content available for all users in CoE Customer roles (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone's Dashboard individually.

Chapter

5

Capturing Demand from Lines of Business

In This Chapter:

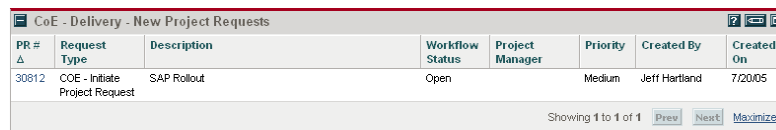
- *Overview of Capturing Demand from Lines of Business*
 - *Capturing Project Initiation Requests*
 - *Typical Roles*
 - *Capturing Support Requests*
 - *Typical Roles*
-

Overview of Capturing Demand from Lines of Business

As users from lines of business (LOB) submit project initiation and support requests, members of the performance Center of Excellence (CoE) need to track them and begin processing them along their workflows. The Mercury IT Governance Dashboard includes portlets that can be distributed to key roles within the performance CoE to optimize incoming demand management.

Capturing Project Initiation Requests

The CoE - Delivery - New Project Requests portlet lists all project initiation requests that have the status of **Open**. Clicking on any project initiation request listed in the portlet brings you to that project request's detail page, where the request can be dealt with as needed. The CoE - Delivery - New Project Requests portlet is shown in [Figure 5-1](#).



PR #	Request Type	Description	Workflow Status	Project Manager	Priority	Created By	Created On
30812	COE - Initiate Project Request	SAP Rollout	Open		Medium	Jeff Hartland	7/20/05

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

Figure 5-1. CoE - Delivery - New Project Requests portlet

Typical Roles

The CoE - Delivery - New Project Requests portlet appears by default as part of the pre-configured Dashboard content available for all roles listed below (see [Distributing Dashboard Modules to Users by Role on page 43](#)):

- CoE Manager
- CoE Operator
- CoE Solution Architect
- CoE Sales Manager
- CoE Engagement Manager
- CoE Project Manager
- CoE Technical Account Manager

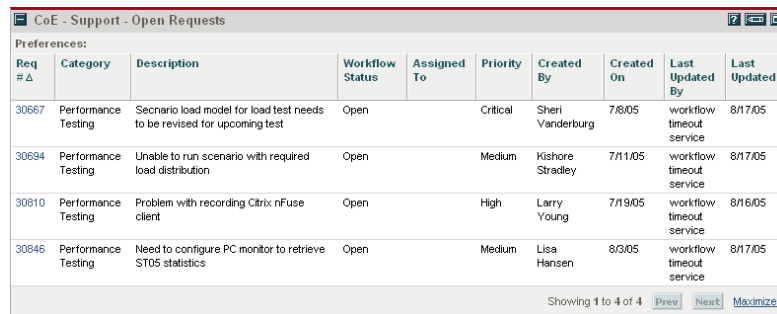
The CoE - Delivery - New Project Requests portlet can also be added to any user's Dashboard individually.

Capturing Support Requests

The CoE - Support - Open Requests portlet lists all support requests that are unassigned or have the status of **Open**. Clicking on any support request listed in the portlet brings you to that request's detail page, where the request can be dealt with as needed. Typically, the portlet is used by Support Tier 1 or Tier 2 engineers for request assignment. General best practice for support request assignment is as follows:

- A Support Tier 1 engineer would assign an open request to himself.
- A Support Tier 2 engineer would assign an open or escalated request to the appropriate person.

The CoE - Support - Open Requests portlet is shown in [Figure 5-2](#).



CoE - Support - Open Requests									
Preferences:									
Req #Δ	Category	Description	Workflow Status	Assigned To	Priority	Created By	Created On	Last Updated By	Last Updated
30667	Performance Testing	Scenario load model for load test needs to be revised for upcoming test	Open		Critical	Sheri Vanderburg	7/8/05	workflow timeout service	8/17/05
30694	Performance Testing	Unable to run scenario with required load distribution	Open		Medium	Kishore Stradley	7/11/05	workflow timeout service	8/17/05
30810	Performance Testing	Problem with recording Citrix nFuse client	Open		High	Larry Young	7/19/05	workflow timeout service	8/16/05
30846	Performance Testing	Need to configure PC monitor to retrieve ST05 statistics	Open		Medium	Lisa Hansen	8/3/05	workflow timeout service	8/17/05

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

Figure 5-2. CoE - Support - Open Requests portlet

Typical Roles

The CoE - Support - Open Requests portlet appears by default as part of the pre-configured Dashboard content available for all roles listed below (see [Distributing Dashboard Modules to Users by Role on page 43](#)):

- CoE Specialist
- CoE Support - Tier 1
- CoE Support - Tier 2

The CoE - Support - Open Requests portlet can also be added to any allowed user's Dashboard individually.

Chapter

6

Creating and Managing Projects

In This Chapter:

- *Overview of Creating and Managing Projects*
 - *Creating a Project*
 - *Performance Delivery Project*
 - *Performance Management Project*
 - *Working with Project Plans*
 - *Capturing Time Worked*
 - *Making Project Status Updates*
 - *Making Scripting Requests*
 - *Viewing and Tracking Project Activity*
 - *Viewing Your Projects*
 - *Viewing Active Projects*
 - *Using the Delivery Center Dashboard Page*
 - *Handling Satisfaction Surveys*
 - *Sending Delivery Customer Satisfaction Surveys*
 - *Sending Post-Mortem Customer Satisfaction Surveys*
 - *Viewing and Tracking Satisfaction Surveys*
-

Overview of Creating and Managing Projects

Project initiation requests are received by the performance Center of Excellence (CoE). The objectives and requirements outlined in a project initiation request can be translated by members of the CoE into an actual project. The most common types of project handled by the performance CoE are:

- A performance delivery project, which delivers a performance optimization or capacity planning project through Mercury Performance Center (PC) or LoadRunner (LR).
- A performance management project, which delivers an application onboarding or application management project through Mercury Business Availability Center (BAC).

When processing a project initiation request, you can create a performance delivery or management project, which includes:

- A performance delivery or management project request, which retains an informational link to the project initiation request that inspired it.
- A project plan in Mercury Project Management associated with the request, which can be created from one of the pre-built project templates delivered with Mercury Performance Center Management as best-practice content. Key performance indicators for the project plan can be viewed from its Project Overview page, part of Mercury Project Management functionality.

Once the project is in flight, Mercury Project Management tracks aspects of the project that include:

- Resources assigned to tasks
- Time spent on tasks
- Scheduling exceptions
- Milestones
- Project and task percent complete
- Task and project cost
- Project performance against baselines

Once the project completes, Mercury Performance Center Management includes surveys that can be sent out to gather satisfaction metrics from lines of business (LOB).

Creating a Project

The following general types of project can be created in Mercury Performance Center Management:

- Performance delivery project
- Performance management project

While any delivery managers (see [Table 3-4 on page 38](#)) can create these projects, only users in the role of CoE Project Manager or Technical Account Manager can drive them through their workflows to completion.

At a certain point along each project request's workflow, a project plan is created in Mercury Project Management and linked to the project request through the Master Project field. See [Working with Project Plans on page 74](#) for more details on project plans.

Performance Delivery Project

The performance delivery project request manages and drives all the content and assets for delivering a performance optimization or capacity planning project through PC or LR. These project requests are managed and driven by an assigned project manager who directly interfaces with the LOB that requested the project.

The performance delivery project request follows the workflow pictured in [Figure 6-1](#) and described in [Table 6-1](#).

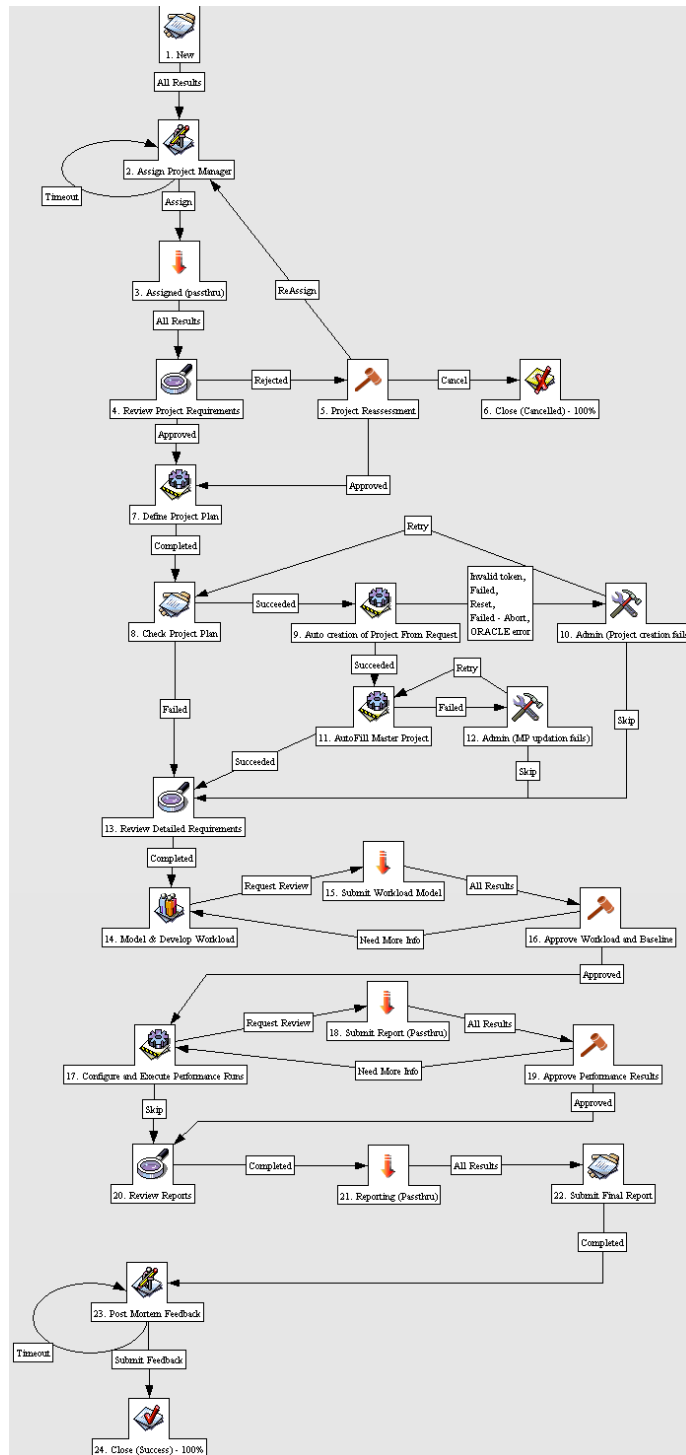


Figure 6-1. Performance delivery project request workflow

Table 6-1. *Performance delivery project request workflow (Sheet 1 of 3)*

Step	Description
New	<p>A new performance delivery project (PDP) request is created. This request manages all the content and assets of a PDP request.</p> <p>A notification email is sent to the CoE Manager and Operator informing the CoE of a new project.</p>
Assign Project Manager	<p>The project is assigned to a Project Manager or Technical Account Manager. This assignment is performed by either the CoE Manager, CoE Operator, Technical Account Manager or Project Manager.</p>
Assigned (pass thru)	<p>A “pass through” step.</p>
Review Project Requirements	<p>The assigned project manager reviews the project scope, objectives, and requirements. The project manager should discuss the details of the project requirements with the LOB in order to ensure that project expectations and goals are well defined. If project type or requirements are deemed unfit for delivery by the performance CoE, it may be rejected.</p> <p>A notification email is sent to all CoE personnel directly involved with the project (as defined in the project personnel subsection).</p>
Project Reassessment	<p>A rejected project is sent to the CoE Manager and Operator. If the CoE Manager decides that the project should be within scope, or negotiates the scope with the LOB, it is reinstated, and the project commences. Otherwise, the project request is cancelled.</p> <p>A notification email is sent to the CoE Manager and Operator for reassessment and requalification.</p>
Close (Cancelled)	<p>The project request was cancelled by the CoE Manager or Operator. It was determined unfit or out-of-scope for the CoE.</p>
Define Project Plan	<p>The project manager defines a project plan. This project plan may either be based on a pre-defined PDP template, or a manually created project plan.</p> <p>A notification email is sent to all CoE personnel directly involved with the project (as defined in the project personnel subsection).</p>
Check Project Plan	<p>If a project plan template was defined, automatic steps are taken to automatically generate a project plan based on the selected template.</p>
Auto creation of Project from Request	<p>The system automatically generates a project entity within IT Governance Center based on the defined project plan template.</p>

Table 6-1. Performance delivery project request workflow (Sheet 2 of 3)

Step	Description
Admin (Project creation fails)	If the automatic generation fails, the IT Governance Center Administrator is notified to take corrective action and retry the operation. A notification email is sent to the IT Governance Center administrators requesting corrective action.
Auto fill Master Project	The Master Project field for the project request is populated with the newly created project.
Admin (MP update fails)	If the automatic population fails, the IT Governance Center Administrator is notified to take corrective action and retry operation. A notification email is sent to the IT Governance Center administrators requesting corrective action.
Review Detailed Requirements	Detailed requirements are reviewed and the preparation phase of the project is begun. The project's current progress and status is updated.
Model & Develop Workload	The performance test's scenario workload model is characterized, validated, and calibrated (if necessary). The environment for the performance tests is also prepared. The primary engineer assigned to the project is responsible for supplying the necessary workload information and any associated assets for approval by the project manager before the execution of performance tests.
Submit Workload Model	A "pass through" step.
Approve Workload and Baseline	The project manager evaluates the workload model and assesses any risks associated with its accuracy. If the workload model and baseline is approved, performance testing can commence. A notification is sent to the assigned project manager requesting review and approval of the performance test's execution plan (such as the scenario workload model).
Configure and Execute Performance Runs	The project manager manages the configuration and execution of performance tests. The primary engineers and project manager update the necessary fields within the project details to track the progress of the project, issues, recommendations, KPI status, changes, etc. Upon completion of the tests, a performance report is generated.
Submit Report (pass thru)	A "pass through" step.

Table 6-1. Performance delivery project request workflow (Sheet 3 of 3)

Step	Description
Approve Performance Results	The project manager must approve the results of the project before the execution phase of the project is brought to an end.
Review Reports	The project manager reviews performance reports.
Reporting (pass thru)	A “pass through” step.
Submit Final Report	A final report is created by the project manager that outlines the objectives, tasks accomplished, and results of the project. This report must be submitted to the LOB’s project manager and sponsors, and attached to the PDP request.
Post Mortem Feedback	A post-mortem customer satisfaction survey should be sent by the project manager to the LOB to obtain overall satisfaction of the LOB, and a service quality assessment.
Close (Success)	The performance delivery project has been completed.

To create a performance delivery project:

1. Log on to Mercury IT Governance Center.

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

2. From the menu bar, select **Center of Excellence > Project Requests > Performance Delivery Project**.

The Create New Request page appears, displaying the appropriate performance delivery project fields.

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the performance delivery project. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Performance Management Project

The performance management project request manages and drives all the content and assets for delivering an application on-boarding or application management project through BAC. These project requests are managed and driven by an assigned project manager who directly interfaces with the LOB that requested the project.

The performance management project request follows the workflow pictured in *Figure 6-2* and described in *Table 6-2*.

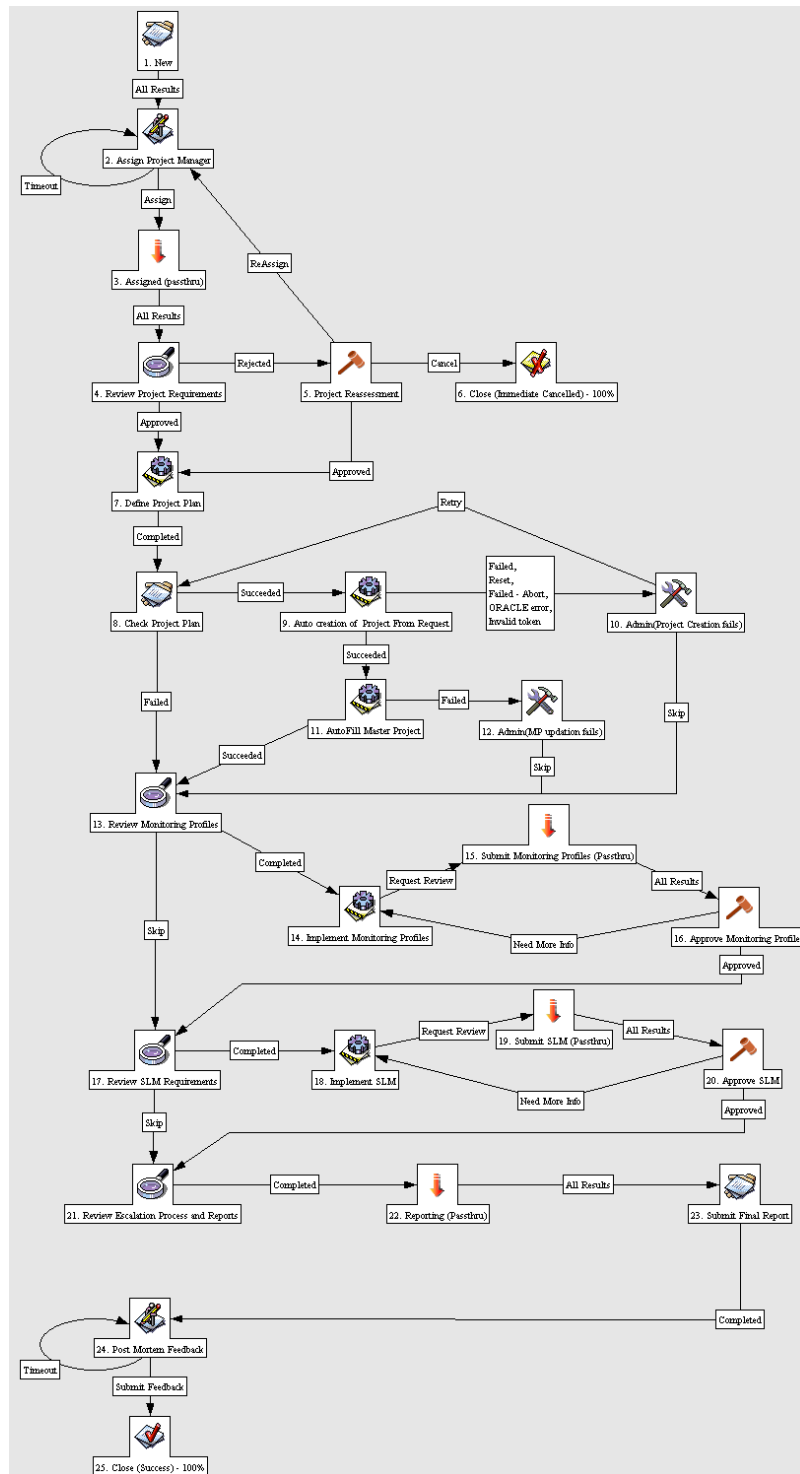


Figure 6-2. Performance management project request workflow

Table 6-2. Performance management project request workflow (Sheet 1 of 3)

Step	Description
New	<p>A new Performance Management Project (PMP) request is created. This request manages all the content and assets of a PMP request.</p> <p>A notification email is sent to the CoE Manager and Operator informing the CoE of a new project.</p>
Assign Project Manager	<p>The project is assigned to a Project Manager or Technical Account Manager. This assignment is performed by either the CoE Manager, CoE Operator, Technical Account Manager or Project Manager.</p>
Assigned (pass thru)	<p>A “pass through” step.</p>
Review Project Requirements	<p>The assigned project manager reviews the project scope, objectives, and requirements. The project manager should discuss the details of the project requirements with the LOB in order to ensure that project expectations and goals are well defined. If the project type or requirements are deemed unfit for delivery by the CoE, it may be rejected.</p> <p>A notification email is sent to all CoE personnel directly involved with the project (as defined in the project personnel subsection).</p>
Project Reassessment	<p>A rejected project is sent to the CoE Manager and Operator. If the CoE Manager decides that the project should be within scope, or negotiates the scope with the Line of Business, it is reinstated, and the project commences. Otherwise, the project request is cancelled.</p> <p>A notification email is sent to the CoE Manager and Operator for reassessment and requalification.</p>
Close (Cancelled)	<p>The project request was cancelled by the CoE Manager or Operator. It was determined unfit or out-of-scope for the CoE.</p>
Define Project Plan	<p>The project manager defines a project plan. This project plan may either be based on a pre-defined PMP template or a manually-created project plan.</p> <p>A notification email is sent to all CoE personnel directly involved with the project (as defined in the project personnel subsection).</p>
Check Project Plan	<p>If a project plan template was defined, automatic steps are taken to automatically generate a project plan based on the selected template.</p>

Table 6-2. Performance management project request workflow (Sheet 2 of 3)

Step	Description
Auto Creation of Project From Request	The system automatically generates a project entity within IT Governance Center based on the defined project plan template.
Admin (Project creation fails)	If the automatic generation fails, the IT Governance Center Administrator is notified to take corrective action and retry the operation. A notification email is sent to the IT Governance Center administrators requesting corrective action.
Auto Fill Master Project	The Master Project field for the project request is populated with the newly created project.
Admin (MP update fails)	If the automatic population fails, the IT Governance Center Administrator is notified to take corrective action and retry operation. A notification email is sent to the IT Governance Center administrators requesting corrective action.
Review Monitoring Profiles	The monitoring requirements for each monitoring component (MAM, BPM, SAM, RUM, CM, EMS) are reviewed and appropriate steps are taken to prepare for implementation.
Implement Monitoring Profiles	The project engineer develops and implements necessary monitoring profiles for each monitoring component (MAM, BPM, SAM, RUM, CM, EMS).
Submit Monitoring Profiles (pass thru)	A “pass through” step.
Approve Monitoring Profiles	The project manager approves the configuration of the monitoring profiles, and reviews the configuration with the LOB.
Review SLM Requirements	The project manager works with the LOB to understand and establish appropriate Service Level Management thresholds and reports.
Implement SLM	The project engineer implements the SLM specifications. The results of the SLM configuration are submitted for approval.
Submit SLM (pass thru)	A “pass through” step.
Approve SLM	The project manager reviews the SLM implementation with the LOB. Any adjustments are submitted to the project engineer for implementation.

Table 6-2. Performance management project request workflow (Sheet 3 of 3)

Step	Description
Review Escalation Process and Reports	The project manager reviews the escalation process for the term of the application management services being rendered. The LOB is trained on the understanding and interpretation of the BAC reports.
Reporting (pass thru)	A “pass through” step.
Submit Final Report	A final report is created by the project manager that outlines the objectives, tasks accomplished, and results of the project. This report must be submitted to the LOB’s project manager and sponsors, and attached to the PMP request.
Post Mortem Feedback	A post mortem customer satisfaction survey should be sent by the project manager to the LOB to obtain overall satisfaction of the LOB, and a service quality assessment.
Close (Success)	The performance delivery project has been completed.

To create a performance management project:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Project Requests > Performance Management Project**.

The Create New Request page appears, displaying the appropriate performance management project fields.

Create New COE - Performance Management Project

Expand All Collapse All
Submit Cancel

Header

Instructions ?

- Use this form to initiate, track, and manage a performance management project.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Workflow Status: New

Created By: Mark Sage

Project Overview ?

*Project Name:

*Project Type:

*Priority:

*Project Class:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the performance management project. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



Note

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

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

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

Working with Project Plans

At a certain point in the workflow for the performance management or delivery project request, you will create a project plan to be associated with your project request. This is done in Mercury Project Management. Depending on the specific requirements and objectives of your performance delivery or management project, you may create this project plan in any of the following ways:

- You can specify a pre-defined project template included in Mercury Performance Center Management.

- You can use a pre-defined project template, but alter it heavily according to your own project needs.
- You can create your own project plan from scratch.

The project plan contains the work breakdown structure of the performance delivery or management project, which defines such project elements as:

- Task hierarchy
- Resources or skills assigned to tasks
- Task and project schedule
- Project exception monitoring
- Project milestones
- Baselines
- Project budget
- Expected cost and effort

Once work has begun on the project, Mercury Project Management creates a Project Overview page accessible from your Dashboard and pictured in [Figure 6-3](#), which can display project performance data including:

- Project percent complete
- Project Gantt chart
- Project exceptions
- Project milestones
- Project cost performance

Additional sections on the Project Overview page included in Mercury Performance Center Management allow you to track metrics specific to the performance CoE, including:

- Status of support requests related to the project (see [Filing Support Requests on page 52](#))
- Results from delivery customer satisfaction surveys related to the project (see [Handling Satisfaction Surveys on page 89](#))
- History of project status updates submitted for the project (see [Making Project Status Updates on page 77](#))

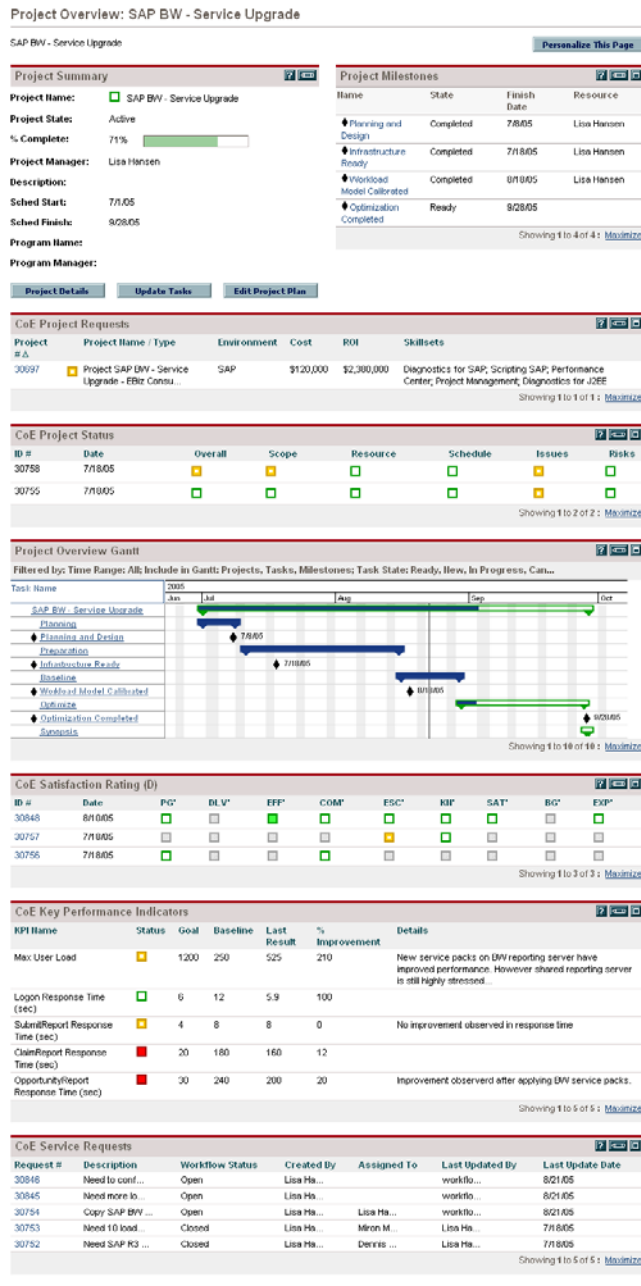


Figure 6-3. Project Overview page

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

Capturing Time Worked

Mercury Project Management can capture the time worked on each task within a project plan by its participants. The project plan can also be configured to automatically calculate task cost based on the resource or skill assigned and the amount of time worked, and roll task costs up to the project level. The project costs can also be compared to the project budget, if one has been defined. Project plan cost data can be subjected to earned value (EV) analysis and visualized in charts. For detailed information on project plan cost capturing and analysis, see the *Mercury Financial Management User's Guide*.

Mercury Project Management can integrate with Mercury Time Management for more granular reporting of time worked at the task level.

- For detailed information on configuring Mercury Time Management (charge codes, override rules, etc.), see the *Mercury Time Management Configuration Guide*.
- For detailed information on using Mercury Time Management (time sheets, approval delegations, etc.), see the *Mercury Time Management User's Guide*.

Making Project Status Updates

During the life of a performance delivery or management project, the project manager can submit a project status update request to update the performance delivery or management project request with the current progress and state of the project. The project status request updates the status of the project based on the following dimensions:

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

The project status update request must be related to a performance delivery or management project request through the Master Project field. Upon completion

of the project status update request, the corresponding performance delivery or management project request's status fields are automatically updated. All project status update requests are reflected chronologically in the Project Overview page for the project request. It is considered best practice for the project manager to issue project status updates on a weekly basis.

The project status update request follows the workflow pictured in *Figure 6-4* and described in *Table 6-3*.

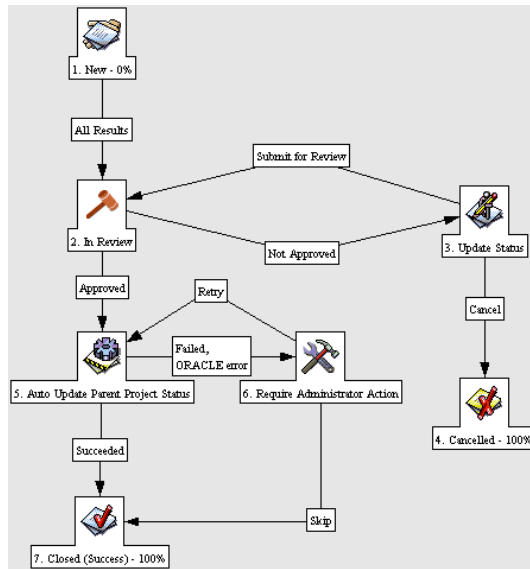


Figure 6-4. Project status update workflow

Table 6-3. Project status update request workflow

Step	Description
New	A project status update request is created with necessary project states and any supporting information explaining the status.
In Review	The CoE Manager or assigned reviewer verifies the project status update request. If the request does not contain sufficient information explaining the status of the project, it can be returned to the owner of the request for update. A notification email is sent to the CoE Manager, owner, and any assigned reviewer reporting the status of the project status update request. If request is not approved, a notification email is sent to the owner requesting an update.

Table 6-3. Project status update request workflow [continued]

Step	Description
Update Status	The owner of the project status update request must update the project status information with required information and resubmit it for approval. A notification email is sent to the owner regarding the condition of the project status update request.
Cancelled	The request was cancelled by the owner of the request.
Auto Update Parent Project Status	The related project’s status fields are automatically updated to reflect the status from the project status update request.
Require Administrator Action	If an error occurs during the execution of the previous step, the IT Governance Center administrator is notified to take appropriate action, and retry the workflow. A notification email is sent to the IT Governance Center administrators requesting corrective action.
Closed (Success)	The request has been completed.

To submit a project status update request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Miscellaneous Requests > Project Status Update**.

The Create New Request page appears, displaying the appropriate project status update fields.

Create New COE - Project Status Update

Expand All
Collapse All

Header

Instructions ?

- Use this form to update current status of designated project..
- The fields with * require your input.

Summary ?

Request Status: New

Created By: Mark Sage

*Assigned Group: *Assigned To:

Project ?

*Master Project:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the project status update request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Making Scripting Requests

As part of ongoing performance delivery or management projects, requests may circulate through the performance CoE for developing business process scripts for:

- Load testing in PC/LR
- Business process monitoring in BAC

These requests are handled by CoE project engineers.

The scripting request follows the workflow pictured in *Figure 6-5* and described in *Table 6-4*.

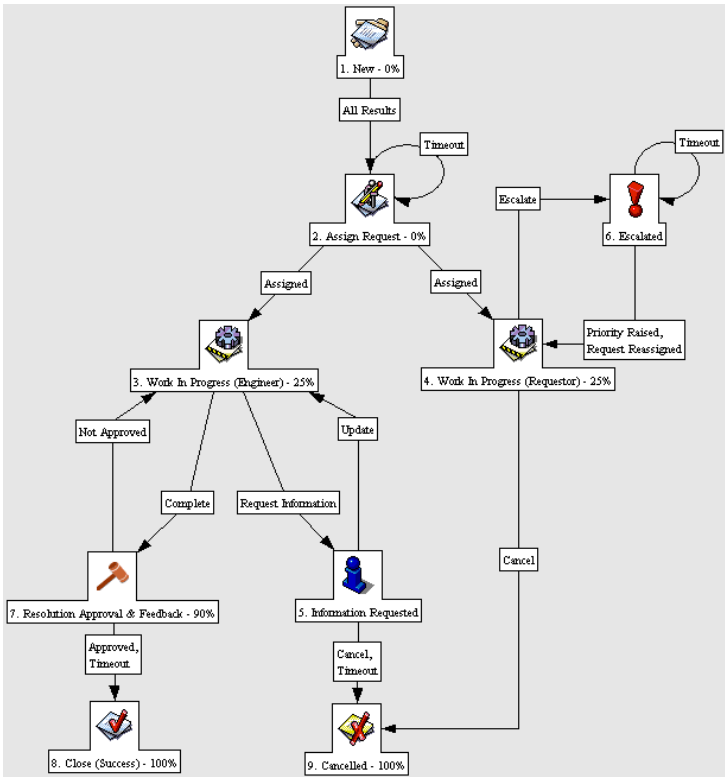


Figure 6-5. Scripting request workflow

Table 6-4. Scripting request workflow

Step	Description
New	A new scripting request is created.
Assign Request	The request is assigned to appropriate personnel for handling the request. The request is usually assigned to a project engineer who is actively involved with the corresponding project. If the request is not associated with a project, the request is assigned to an available project engineer based on priority. A notification email is sent to project managers and engineers for assignment of the request.
Work In Progress (Engineer)	The assigned engineer performs the required tasks to process and address the needs of the request.
Work In Progress (Requestor)	The request is provided the opportunity to track the request and escalate if necessary.

Table 6-4. Scripting request workflow [continued]

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

To submit a scripting request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Service Requests > Scripting Request**.

The Create New Request page appears, displaying the appropriate scripting request fields.

Create New COE - Scripting Request

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to submit detailed business process scripting tasks.
- The fields with * require your input.
- Please provide as much information as possible for a speedy scripting effort.
- Please ensure that the information is complete and accurate.

General Information ?

Request Status: New

Created By: Mark Sage Priority: Medium

BP Contact Name: Contact Phone: Contact Email:

Project Reference ?

Master Project

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the scripting request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Viewing and Tracking Project Activity

Mercury Performance Center Management delivers pre-configured Dashboard content that gives you a comprehensive real-time view of current projects and key performance metrics.



Depending on your role in the CoE, you may find different portlets and Dashboard pages available to you. See [Distributing Dashboard Modules to Users by Role on page 43](#) for more details.

Viewing Your Projects

Once you have created a performance delivery or management project request, you can view it on your Dashboard. The CoE - Delivery - My Projects portlet lists all requests of the following type that you have submitted and displays the status of each in real time:

- Performance delivery project request
- Performance management project request
- Project initiation request

Figure 6-6 shows the CoE - Delivery - My Projects portlet.

PR #	Status	Description	Workflow Status	Project Manager	Priority	Created By	Created On	Last Updated By	Last Update Date
30640	<input type="checkbox"/>	Project Ironman - CLab - Ironman Inc. - Performance Optimization	Pending Detailed ...	Lisa Hansen	Medium	Sanjay Mayekar	7/7/05	Imran Tusneem	7/19/05
30679	<input type="checkbox"/>	Project Goliath Online - EBiz Corporation - Application Management	Pending Results R...	Lisa Hansen	Medium	Lisa Hansen	7/9/05	Imran Tusneem	7/19/05
30684	<input type="checkbox"/>	Project ECOM - V5.0 - Major Upgrade - Ironman Inc. - Performance Optimization	In Development	Syed Mysore	High	Syed Mysore	7/10/05	Syed Mysore	7/22/05
30690	<input type="checkbox"/>	Project Orion - SAP ERP/CRM - Management - EBiz Corporation - Application Management	In Development	Syed Mysore	Medium	Syed Mysore	7/11/05	Imran Tusneem	7/20/05
30697	<input type="checkbox"/>	Project SAP BW - Service Upgrade - EBiz Consulting Corporation - Performance Validation	In Execution	Lisa Hansen	Medium	Leo Choi	7/11/05	Lisa Hansen	8/10/05

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Figure 6-6. CoE - Delivery - My Projects portlet

The CoE - Delivery - My Projects portlet appears by default as part of the pre-configured Dashboard content available for all users in the role of CoE - Project Manager and CoE - Technical Account Manager (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone’s Dashboard individually.

Viewing Active Projects

The CoE - Delivery - Active Projects portlet lists all requests of the following type that do not have the status **Closed** or **Cancelled** and displays the status of each in real time:

- Performance delivery project request
- Performance management project request
- Project initiation request

Figure 6-7 shows the CoE - Delivery - Active Projects portlet.

PR #	Status	Phase	Description	Workflow Status	Project Manager	Priority	Created By	Created On
30640		1- Planning	Project Ironman - CLab - Ironman Inc. - Performance Optimization	Pending Detailed ...	Lisa Hansen	Medium	Sanjay Mayekar	7/7/05
30679		3- Validation	Project Golath Online - EBiz Corporation - Application Management	Pending Results R...	Lisa Hansen	Medium	Lisa Hansen	7/9/05
30684		1- Planning	Project ECOM - VS D - Major Upgrade - Ironman Inc. - Performance Optimization	In Development	Syed Mysore	High	Syed Mysore	7/10/05
30690		1- Planning	Project Orion - SAP ERP/CRM - Management - EBiz Corporation - Application Management	In Development	Syed Mysore	Medium	Syed Mysore	7/11/05
30697		4- Optimize	Project SAP BW - Service Upgrade - EBiz Consulting Corporation - Performance Validation	In Execution	Lisa Hansen	Medium	Leo Choi	7/11/05
30698		1- Planning	Project JZEE - Core Dev Phase - Capacity Planning	Pending Detailed ...	Lisa Hansen	Medium	Yamini Chandrawat	7/12/05
30781		1- Planning	Project HRise - Performance Optimization	Pending Detailed ...	Lisa Hansen	Medium	Lisa Hansen	7/19/05
30783		1- Planning	Project eInsurance - Performance Optimization	In Review	Lisa Hansen	Medium	Lisa Hansen	7/19/05
30844	-	-	PSFT Upgrade	In Progress	Syed Mysore	Medium	Jeff Hartland	8/1/05

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Figure 6-7. CoE - Delivery - Active Projects portlet

The CoE - Delivery - Active Projects portlet appears by default as part of the pre-configured Dashboard content available for all users in the following roles (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone's Dashboard individually:

- CoE - CoE Manager
- CoE - CoE Operator
- CoE - CoE Solution Architect
- CoE - CoE Sales Representative
- CoE - CoE Engagement Manager

Using the Delivery Center Dashboard Page

The **Delivery Center** Dashboard page is pre-configured Dashboard content available to users in the roles of CoE Manager and CoE Operator. It contains

several portlets that track and display metrics related to in-flight projects in the performance CoE. *Figure 6-8* shows the **Delivery Center** Dashboard page.

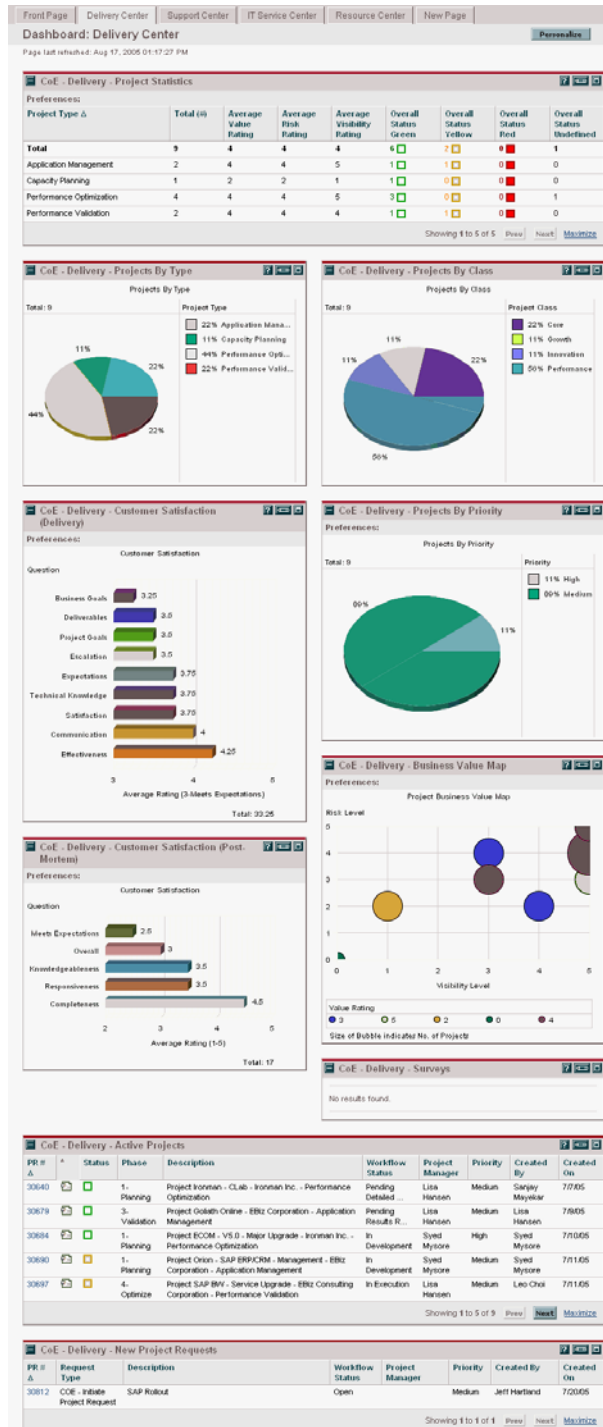


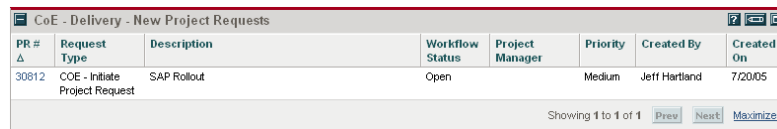
Figure 6-8. Delivery Center Dashboard page

CoE - Delivery - New Project Requests Portlet

The CoE - Delivery - New Project Requests portlet lists all requests of the following type that have the status **Open** and displays the status of each in real time:

- Performance delivery project request
- Performance management project request
- Project initiation request

Figure 6-9 shows the CoE - Delivery - New Project Requests portlet.



PR #	Request Type	Description	Workflow Status	Project Manager	Priority	Created By	Created On
30812	COE - Initiate Project Request	SAP Rollout	Open		Medium	Jeff Hartland	7/20/05

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Figure 6-9. CoE - Delivery - New Project Requests portlet

CoE - Delivery - Projects By Class Portlet

The CoE - Delivery - Projects By Class portlet displays a pie chart of all performance delivery and management project requests, differentiated by the Project Class field. *Figure 6-10* shows the CoE - Delivery - Projects By Class portlet.

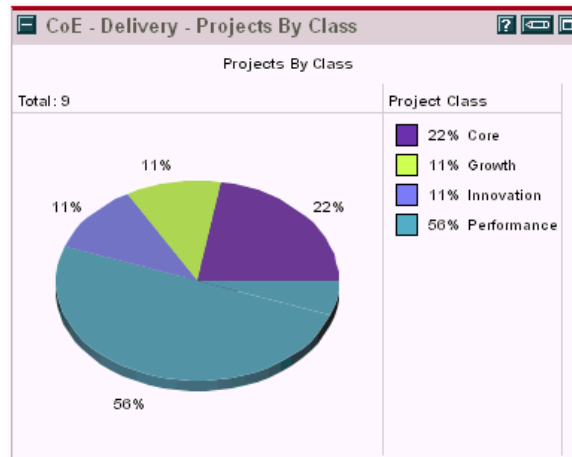


Figure 6-10. CoE - Delivery - Projects By Class portlet

CoE - Delivery - Projects By Type Portlet

The CoE - Delivery - Projects By Type portlet displays a pie chart of all performance delivery and management project requests, differentiated by the Project Type field. *Figure 6-11* shows the CoE - Delivery - Projects By Type portlet.

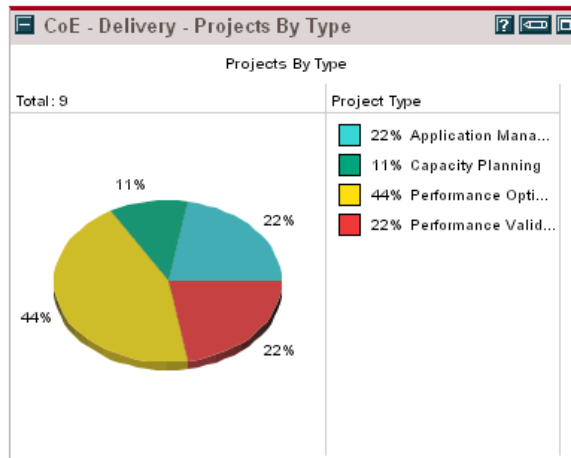


Figure 6-11. CoE - Delivery - Projects By Type portlet

CoE - Delivery - Project Statistics Portlet

The CoE - Delivery - Project Statistics portlet lists all performance delivery and management project requests grouped by Project Type, giving the averages of key project performance metrics for each category such as:

- Average value rating
- Average risk rating

Figure 6-12 shows the CoE - Delivery - Project Statistics portlet.

Project Type	Total (#)	Average Value Rating	Average Risk Rating	Average Visibility Rating	Overall Status Green	Overall Status Yellow	Overall Status Red	Overall Status Undefined
Total	9	4	4	4	6	2	0	1
Application Management	2	4	4	5	1	1	0	0
Capacity Planning	1	2	2	1	1	0	0	0
Performance Optimization	4	4	4	5	3	0	0	1
Performance Validation	2	4	4	4	1	1	0	0

Figure 6-12. CoE - Delivery - Project Statistics portlet

Handling Satisfaction Surveys

It is considered best practice for the performance CoE to gather customer satisfaction data from the LOB during an in-flight project, or after completing a project. Mercury Performance Center Management includes the following pre-built surveys contained in requests that can be sent out and processed along their own workflows:

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

Sending Delivery Customer Satisfaction Surveys

The delivery customer satisfaction survey is a request to the LOB for an evaluation of the current service rendered based on established expectations. The survey should be issued by the project manager to the LOB project manager on a periodic basis (such as weekly) in order to assess the customer's assessment of project progress. This request must be related to a performance delivery or management project through the Master Project field.

The delivery customer satisfaction survey request follows the workflow pictured in [Figure 6-13](#) and described in [Table 6-5](#).

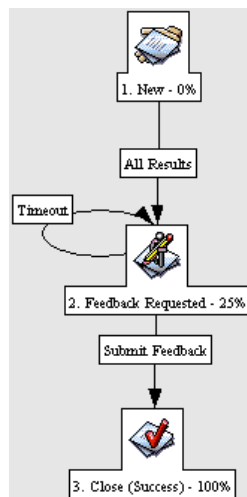


Figure 6-13. Delivery customer satisfaction survey workflow

Table 6-5. Delivery customer satisfaction survey workflow

Step	Description
New	A new survey request for a performance delivery or management project is submitted
Feedback Requested	Feedback is entered from the assigned personnel, usually the project manager representing the LOB. The CoE project manager may also complete this form on the behalf of the LOB, if the LOB project manager does not have access to the IT Governance Center interface. A notification email with survey questions is sent to the assigned personnel and owner of the survey request.
Close (Success)	The survey has been completed

To send out a delivery customer satisfaction survey:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Survey Requests > Delivery Customer Satisfaction Survey**.

The Create New Request page appears, displaying the appropriate survey request fields.

Create New COE - Delivery Customer Satisfaction Survey

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to rate service level expectations and provide necessary feedback.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Request Status: New

Created By: Mark Sage

*Assigned Group:

*Assigned To:

Project Reference ?

Master Project:

3. Complete the Assigned Group, Assigned To, and Master Project fields.
4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



Note

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

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

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

Sending Post-Mortem Customer Satisfaction Surveys

The post-mortem customer satisfaction survey is a survey sent to the LOB after service has been rendered and the project has been completed. This survey measures the overall customer satisfaction and provides any necessary feedback or recommendations to the performance CoE. This request must be related to a performance delivery or management project through the Master Project field.

The post-mortem customer satisfaction survey request follows the workflow pictured in [Figure 6-14](#) and described in [Table 6-6](#).

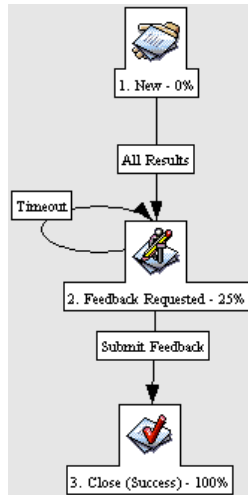


Figure 6-14. Post-mortem customer satisfaction survey workflow

Table 6-6. Post-mortem customer satisfaction survey workflow

Step	Description
New	A new survey request for a performance delivery or management project is submitted
Feedback Requested	Feedback is entered from the assigned personnel, usually the project manager representing the LOB. The CoE project manager may also complete this form on the behalf of the LOB, if the LOB project manager does not have access to the IT Governance Center interface. A notification email with survey questions is sent to the assigned personnel and owner of the survey request.
Close (Success)	The survey has been completed

To send out a post-mortem customer satisfaction survey:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Survey Requests > Post-Mortem Customer Satisfaction Survey**.

The Create New Request page appears, displaying the appropriate survey request fields.

Create New COE - Post-Mortem Customer Satisfaction Survey

Expand All Collapse All Submit Cancel

Header



Instructions ?

- Use this form to rate service level satisfaction and provide necessary feedback.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.


Summary ?

Request Status: New

Created By: Mark Sage

*Assigned Group:  *Assigned To: 

Project Reference ?

Master Project: 

3. Complete the Assigned Group, Assigned To, and Master Project fields.

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Viewing and Tracking Satisfaction Surveys

Mercury Performance Center Management delivers pre-configured Dashboard content that gives you a comprehensive real-time view of delivery and post-mortem customer survey-related metrics.



Note

Depending on your role in the CoE, you may find different portlets and Dashboard pages available to you. See [Distributing Dashboard Modules to Users by Role on page 43](#) for more details.

CoE - Delivery - Surveys Portlet

The CoE - Delivery - Surveys portlet lists all of the delivery and post-mortem customer satisfaction surveys that do not have the status **Closed** and displays the status of each in real time. The CoE - Delivery - Surveys portlet appears by default as part of the pre-configured Dashboard content available for all users in the roles of CoE Project Manager and CoE Technical Account Manager (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone's Dashboard individually.

Delivery Center Dashboard Page

The **Delivery Center** Dashboard page is pre-configured Dashboard content available to users in the roles of CoE Manager and CoE Operator. Aside from containing several portlets that track and display metrics related to in-flight projects in the performance CoE, it also contains portlets that display data on delivery and post-mortem customer satisfaction surveys.

The CoE - Delivery - Customer Satisfaction (Delivery) portlet displays a bar chart of average customer satisfaction score per month (for the last 6 months) for performance delivery and management project requests based on their last delivery customer satisfaction surveys. [Figure 6-15](#) shows the CoE - Delivery - Customer Satisfaction (Delivery) portlet.

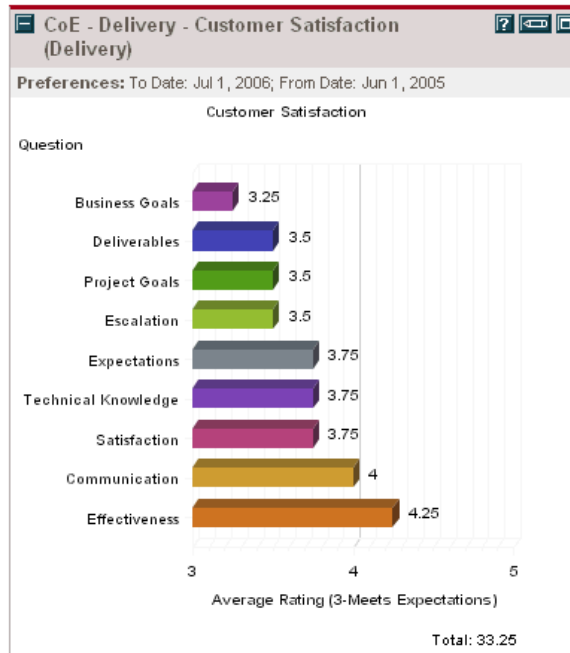


Figure 6-15. CoE - Delivery - Customer Satisfaction (Delivery) portlet

The CoE - Delivery - Customer Satisfaction (Post-Mortem) portlet displays a bar chart of average customer satisfaction score per month (for the last 6 months) for performance delivery and management project requests based on their last post-mortem customer satisfaction surveys. [Figure 6-16](#) shows the CoE - Delivery - Customer Satisfaction (Post-Mortem) portlet.

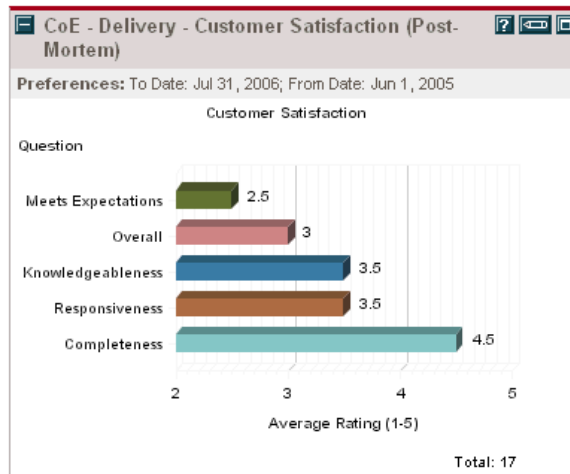


Figure 6-16. CoE - Delivery - Customer Satisfaction (Post-Mortem) portlet

Chapter

7

Training Center of Excellence Personnel

In This Chapter:

- *Overview of Training Center of Excellence Personnel*
 - *Creating Certification Courses*
 - *Making Training and Certification Requests*
 - *Publishing Knowledge Base Articles*
 - *Viewing and Tracking Training and Certification Activity*
 - *Viewing Skillset Coverage*
 - *Viewing Available Courses*
 - *Viewing Active Training*
 - *Viewing Recently Published Knowledge Base Articles*
-

Overview of Training Center of Excellence Personnel

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

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

Creating Certification Courses

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

The course definition request follows the workflow pictured in [Figure 7-1](#) and described in [Table 7-1](#).

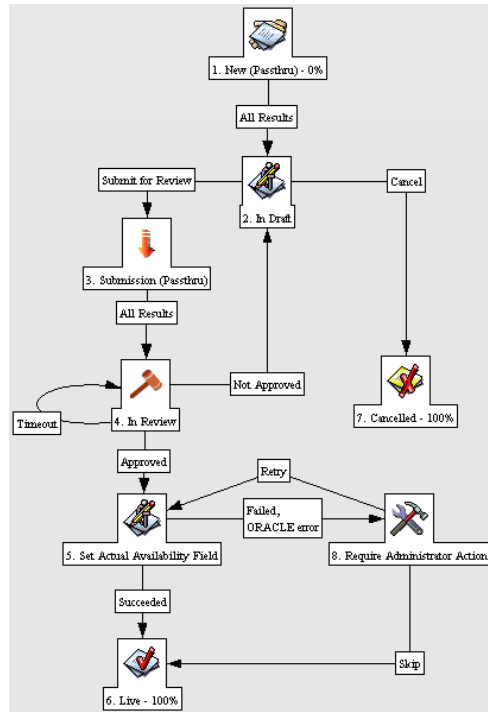


Figure 7-1. Certification course definition request workflow

Table 7-1. Certification course definition request workflow

Step	Description
New	A new course definition request is created.
In Draft	The trainer builds the content for the training and certification course. The course should contain prerequisites, tasks, environments, and exams. Once the course definition is completed, the courseware developer must submit it for review. A notification email is sent to the courseware developer with the status of the request.
Submission (Passthru)	A “pass through” step.
In Review	The certification manager assigns the request to an appropriate CoE trainer or him/herself for reviewing the content of the courseware. The assigned reviewer is responsible for approving the content. A notification email is sent to the CoE Certification Manager and Certification Trainers requesting review of the course definition.

Table 7-1. Certification course definition request workflow [continued]

Step	Description
Set Actual Availability Field	Once the course definition is approved, the actual availability field is set to the requested availability.
Live	The course definition has been completed. A notification email is sent to the requestor, CoE Certification Manager, and Trainers, advising them of the availability of the courseware.
Cancelled	The request has been cancelled by the requestor. The IT Governance Center administrator should clear the IT Governance system of any cancelled requests after a defined period of time (such as 2 months).
Require Administrator Action	An error occurred during the “Set Actual Availability Field” step while setting the actual availability of the courseware. The IT Governance Center administrator should take corrective action and retry the operation. A notification email is sent to the IT Governance Center administrators requesting corrective action.

To create a course definition request:

1. Log on to Mercury IT Governance Center.

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

2. From the menu bar, select **Center of Excellence > Certification Requests > Certification Course Definition**.

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

Create New COE - Certification Course Definition

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to define a certification and training course.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Workflow Status: New

Created By: Kim Reddick

*Course Name: *Level: Level 1

Overview:

Requested Availability:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the course definition. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Making Training and Certification Requests

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

The training request follows the workflow pictured in [Figure 7-2](#) and described in [Table 7-2](#).

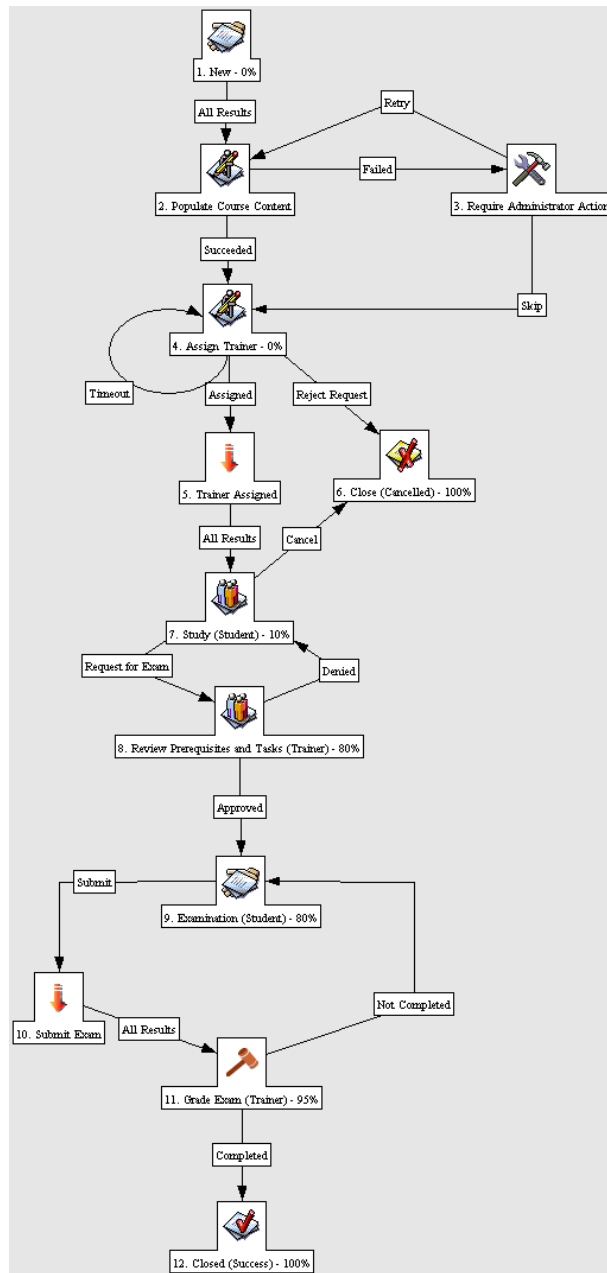


Figure 7-2. Training and certification request workflow

Table 7-2. Training and certification request workflow

Step	Description
New	A new request for training and certification is created.
Populate Course Content	Based on the course requested, the appropriate fields and content for the Prerequisites, Tasks, Environments, and Exams sections are populated.
Require Administrator Action	An error occurred during the “Populate Course Content” step while loading the content for the course. The IT Governance Center administrator should take corrective action and retry the operation. A notification email is sent to the IT Governance Center administrators requesting corrective action.
Assign Trainer	The training request is assigned to an appropriate trainer based on the course requested. A notification email is sent CoE Certification Manager and Trainers requesting assignment of the request.
Trainer Assigned	A “pass through” step.
Close (Cancelled)	If the training request is rejected either due to limited availability on the part of the trainer or for other possible reasons, the request is closed.
Study (Student)	The requestor or student reviews through the course prerequisites and performs the required tasks. The results of the prerequisite requirements and task requirements are uploaded into the request by the student for review by the trainer. A notification email is sent to the student and assigned trainer regarding the status of the training request.
Review Prerequisites and Tasks	The trainer evaluates whether the prerequisites for the course were met, and the tasks completed. A notification email is sent to the student and assigned trainer regarding the status of the training request.
Examination (Student)	If prerequisites and tasks were completed, the course exam is administered. The student must complete the required exams and submit the answers through the request. A notification email is sent to the student and assigned trainer regarding the status of the training request.
Submit Exam	A “pass through” step.

Table 7-2. Training and certification request workflow [continued]

Step	Description
Grade Exam	The trainer reviews the exams. If any exam was not completed satisfactorily, the exam may be returned to the student for completion. The trainer grades the exams, and rates the student's proficiency and performance. The CoE Trainer should update the student's resource profile with the appropriate skills and proficiency level.
Closed (Success)	The training course has been completed.

To create a training and certification request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Certification Requests > Training & Certification Request**.

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

Create New COE - Training & Certification Request

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to submit and track a training and certification request.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Workflow Status: New

Created By: Mark Sage

*Course:

Overview:

Level:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the training and certification request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



Note

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

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

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

Publishing Knowledge Base Articles

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

The knowledge base article request follows the workflow pictured in [Figure 7-3](#) and described in [Table 7-3](#).

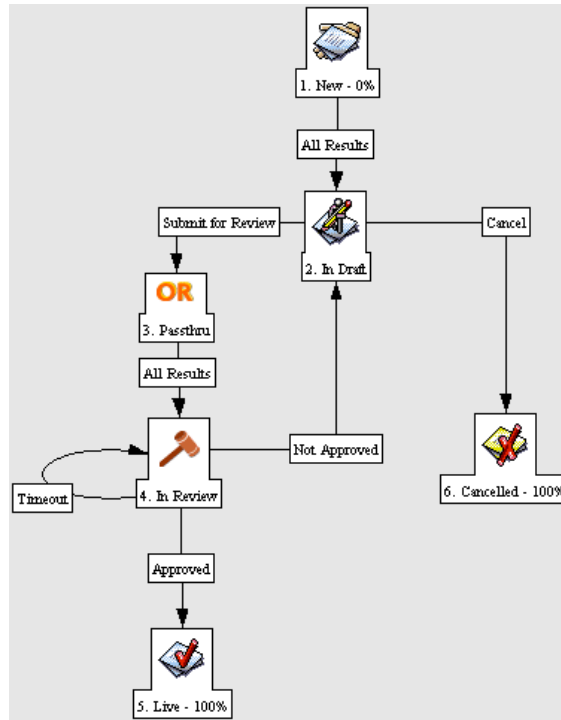


Figure 7-3. Knowledge base article request workflow

Table 7-3. Knowledge base article request workflow

Step	Description
New	A new draft of a knowledge base article is created.
In Draft	The author of the article should finalize the content of the article, making any necessary revisions based on comments from reviewers, and submit it for review. The author may also choose to cancel the article if article content is obsolete or not needed for publication. A notification email is sent to the author and assigned reviewer (if available) regarding the status of the article.
Passthru	A “pass through” step.
In Review	The CoE Certification Manager should assign a reviewer to the knowledge base article if one has not already been assigned. The reviewer either approves the content for publication or rejects it with necessary feedback to the author. A notification email is sent to the author and assigned reviewer regarding the status of the article.

Table 7-3. Knowledge base article request workflow [continued]

Step	Description
Live	The knowledge base article is live, and can be viewed by the defined targeted audience (security group).
Cancelled	The article was cancelled by the author. A notification email is sent to the assigned reviewer and author.

To publish a knowledge base article:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Miscellaneous Requests > Knowledge Base Article**.

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

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the knowledge base article. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

The Notes section contains fields where notes and information concerning the knowledge base article request can be entered and stored. Typically,

when creating a knowledge base article, you do not need to add a note to it. However, add a note if you want to convey additional information to the reviewers and processors of the request.

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

The Request Creation Confirmed page appears.



Note

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

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

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

Viewing and Tracking Training and Certification Activity

Mercury Performance Center Management delivers pre-configured Dashboard content that gives you a comprehensive real-time view of current training activity and skillset coverage.



Note

Depending on your role in the CoE, you may find different portlets and Dashboard pages available to you. See [Distributing Dashboard Modules to Users by Role on page 43](#) for more details.

Viewing Skillset Coverage

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

- **Chart.** The CoE - Certification - Skillset Coverage (Chart) portlet displays a stacked bar chart of the skillsets and proficiencies covered by users in the performance CoE, as defined by the CoE CORE USERS security group. [Figure 7-4](#) shows the CoE - Certification - Skillset Coverage (Chart) portlet.

- Table.** The CoE - Certification - Skillset Coverage (Table) portlet displays a list of the skillsets and proficiencies covered by users in the performance CoE, as defined by the CoE CORE USERS security group. *Figure 7-5* shows the CoE - Certification - Skillset Coverage (Table) portlet.

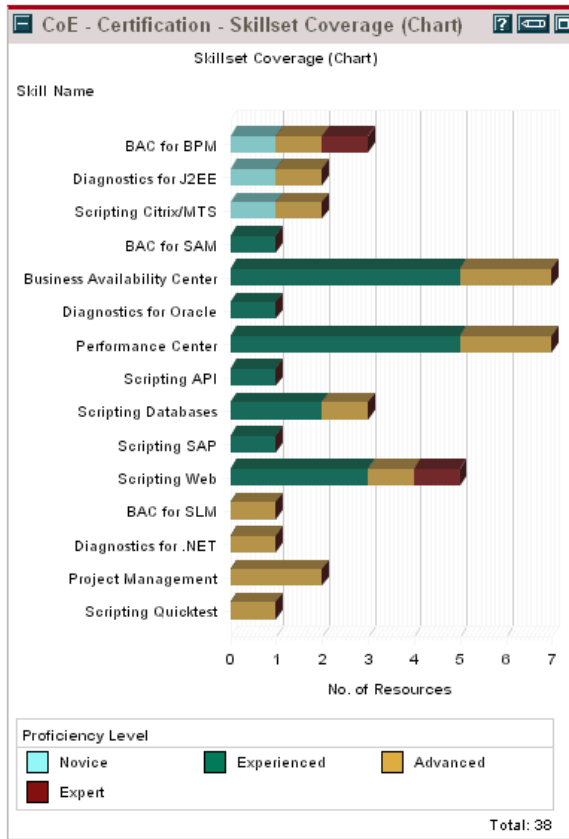


Figure 7-4. CoE - Certification - Skillset Coverage (Chart) portlet

Skill Name	Novice	Experienced	Advanced	Expert	Wizard
BAC for BPM	1	0	1	1	0
BAC for SAM	0	1	0	0	0
BAC for SLM	0	0	1	0	0
Business Availability Center	0	5	2	0	0
Diagnostics for .NET	0	0	1	0	0
Diagnostics for J2EE	1	0	1	0	0
Diagnostics for Oracle	0	1	0	0	0
Performance Center	0	5	2	0	0
Project Management	0	0	2	0	0
Scripting API	0	1	0	0	0

Figure 7-5. CoE - Certification - Skillset Coverage (Table) portlet

The CoE - Certification - Skillset Coverage portlet appears by default as part of the pre-configured Dashboard content available for all users in the roles

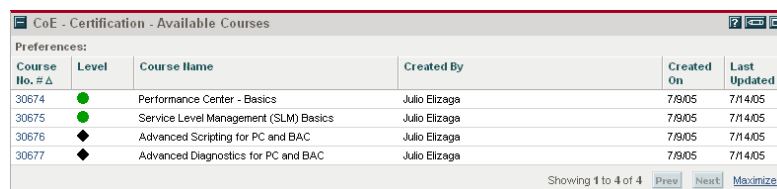
listed in [Table 7-4](#) (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone's Dashboard individually:

Table 7-4. CoE - Certification - Skillset Coverage portlet distribution

Portlet Form	CoE Role
Chart, Table	CoE Manager
	CoE Certification Manager
	CoE Trainer
Table	CoE Solution Architect
	CoE Sales Representative
	CoE Engagement Manager
	CoE Project Manager
	CoE Technical Account Manager
	CoE Specialist

Viewing Available Courses

The CoE - Certification - Available Courses portlet lists all of the certification course definitions that have the status **Live** and displays the status of each in real time. [Figure 7-6](#) shows the CoE - Certification - Available Courses portlet.



Course No. # Δ	Level	Course Name	Created By	Created On	Last Updated
30674	●	Performance Center - Basics	Julio Elizaga	7/8/05	7/14/05
30675	●	Service Level Management (SLM) Basics	Julio Elizaga	7/8/05	7/14/05
30676	◆	Advanced Scripting for PC and BAC	Julio Elizaga	7/8/05	7/14/05
30677	◆	Advanced Diagnostics for PC and BAC	Julio Elizaga	7/8/05	7/14/05

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Figure 7-6. CoE - Certification - Available Courses portlet

The CoE - Certification - Available Courses portlet appears by default as part of the pre-configured Dashboard content available for all users in CoE roles except the following (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone's Dashboard individually.

- CoE - CoE Operator
- CoE Customer - Project Manager

- CoE Customer - User

Viewing Active Training

The CoE - Certification - Active Training portlet lists all of the training and certification requests that do not have the status **Closed** and displays the status of each in real time. *Figure 7-7* shows the CoE - Certification - Active Training portlet.

Req #	Course Name	Student	Trainer	Created On	Workflow Status
30842	Understanding Service Level Management (SLM)	YaminiChandrawat		7/29/05	In Progress
30843	Understanding Service Level Management (SLM)	YaminiChandrawat		7/29/05	Assign

Figure 7-7. CoE - Certification - Active Training portlet

The CoE - Certification - Active Training portlet appears by default as part of the pre-configured Dashboard content available for all users in the following CoE roles (see *Distributing Dashboard Modules to Users by Role on page 43*), but it can be added to anyone’s Dashboard individually.

- CoE - CoE Manager
- CoE - CoE Certification Manager
- CoE - CoE Trainer

Viewing Recently Published Knowledge Base Articles

The CoE - Certification - Recent Publications portlet lists the fifteen most recently modified knowledge base article requests that have the status **Live** and displays the status of each in real time. *Figure 7-8* shows the CoE - Certification - Recent Publications portlet.

KB #	Description	Workflow Status	Last Updated
30631	Optimizing load farm for high volume and large scale load testing	Live	Roy Machamer
30632	Installing Performance Center in windows cluster environment	Live	Roy Machamer
30635	Diagnosing and troubleshooting performance problems in Apache	Live	Roy Machamer

Figure 7-8. CoE - Certification - Recent Publications portlet

The CoE - Certification - Recent Publications portlet appears by default as part of the pre-configured Dashboard content available for all users in CoE roles

except the following (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone's Dashboard individually.

- CoE - CoE Operator
- CoE Customer - Project Manager

Chapter

8

Handling Administrative Activity

In This Chapter:

- *Overview of Handling Administrative Activity*
 - *Filing Account Setup Requests*
 - *Filing PC Provisioning Requests*
 - *Filing BAC Provisioning Requests*
 - *Filing IT Service Requests*
 - *Viewing and Tracking Administrative Activity*
 - *Viewing Open Administrative Requests*
 - *Using the IT Service Center Dashboard Page*
-

Overview of Handling Administrative Activity

The performance Center of Excellence (CoE) has its own set of internal administrative activities that should be seen to by the appropriate CoE personnel. Mercury Performance Center Management includes request types and workflows for these activities, including:

- Account setup
- Mercury Performance Center (PC) provisioning
- Mercury Business Availability Center (BAC) provisioning
- IT service

Filing Account Setup Requests

When a new user is about to be added to Mercury Performance Center Management, an account needs to be requested. The account setup request provided by Mercury Performance Center Management is an administrative request to create or update accounts within Mercury IT Governance Center for access by CoE personnel or lines of business (LOB).

The account setup request follows the workflow pictured in *Figure 8-1* and described in *Table 8-1*.

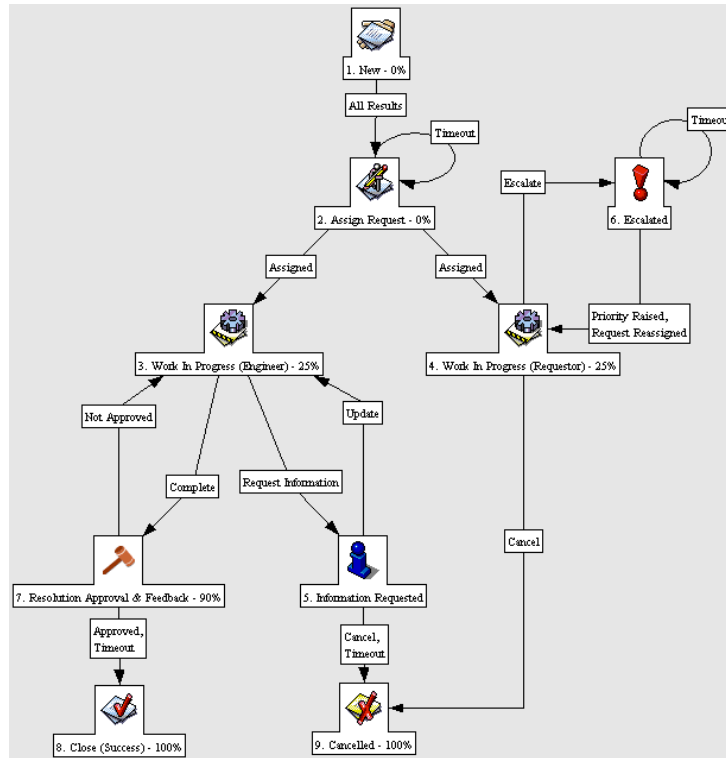


Figure 8-1. Account setup request workflow

Table 8-1. Account setup request workflow

Step	Description
New	A new request for account setup is created.
Assign Request	The request is assigned to appropriate personnel for handling of the request. The request is usually assigned to an IT Governance Center administrator, who coordinates the tasks with other appropriate administrators. A notification email is sent to CoE administrators, project and technical account managers requesting assignment of the request.
Work In Progress (Engineer)	The assigned engineer performs the required tasks to process and address the needs of the request.
Work In Progress (Requestor)	The requestor is provided the opportunity to track the request and escalate if necessary.

Table 8-1. Account setup request workflow [continued]

Step	Description
Information Requested	Additional information is requested from the owner of the request. A notification email is sent to the requestor asking for additional information.
Escalated	The request has been escalated. It should be either reassigned or its priority raised, and appropriate action must be taken to expedite resolution for the request. Action should be taken by the administrative team, or project and technical account manager. A notification email is sent to CoE administrators, project and technical account managers requesting handling of request escalation.
Resolution Approval & Feedback	A resolution has been submitted, and is pending requestor's approval and feedback. The requestor can complete the feedback section to provide service level metrics back to CoE management. If feedback is not provided within configured timeout interval (usually 7 days), the request is automatically closed. A notification email is sent to the requestor with status of request.
Close (Success)	The request has been completed.
Cancelled	The request was cancelled by the requestor, or the requestor was unresponsive to the demand for more information in order to properly process the request.

To create an account setup request:

1. Log on to Mercury IT Governance Center.

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

2. From the menu bar, select **Center of Excellence > Administrative Requests > Account Setup**.

The Create New Request page appears, displaying the appropriate account setup request fields.

Create New COE - Account Setup

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to setup user accounts and/or contacts in ITG for Center of Excellence site.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Created By: Mark Sage

Requested For: Telephone:

Workflow Status: New

*Priority: Medium

Email:

Project Reference ?

Master Project:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the account setup request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Filing PC Provisioning Requests

The PC provisioning request supplied by Mercury Performance Center Management is an administrative request to provision for any necessary accounts, licenses, configurations, and hardware or software assets needed to deliver a performance delivery project through Mercury Performance Center (PC). This request is necessary to set up the environment for the CoE and LOB in order to meet project objectives.

The PC provisioning request follows the workflow pictured in *Figure 8-2* and described in *Table 8-2*.

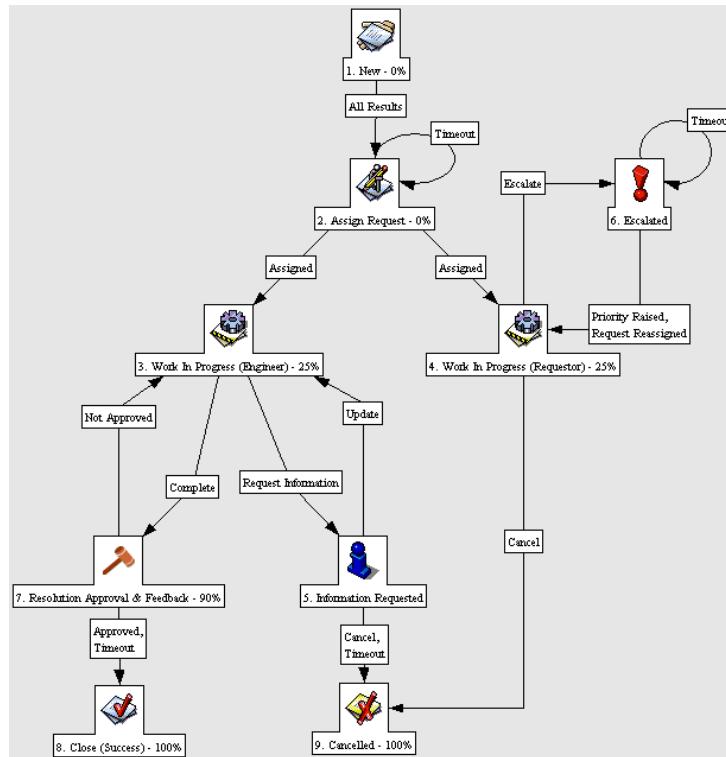


Figure 8-2. PC provisioning request workflow

Table 8-2. PC provisioning request workflow

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

To create a PC provisioning request:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Center of Excellence > Administrative Requests > PC Provisioning**.

The Create New Request page appears, displaying the appropriate PC provisioning request fields.

Create New COE - PC Provisioning Request

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to configure environment for purposes of performance testing and optimization.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Created By: Mark Sage Workflow Status: New

Priority: Medium

Contact Name: Contact Phone: Contact Email:

Project Reference ?

Master Project:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the PC provisioning request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

- Once the PC provisioning request has been submitted, it is routed along its workflow.

Filing BAC Provisioning Requests

The BAC provisioning request supplied by Mercury Performance Center Management is an administrative request to provision for any necessary accounts, licenses, configurations, and hardware or software assets needed to deliver a performance management project through Mercury Business Availability Center (BAC).

The BAC provisioning request follows the workflow pictured in *Figure 8-3* and described in *Table 8-3*.

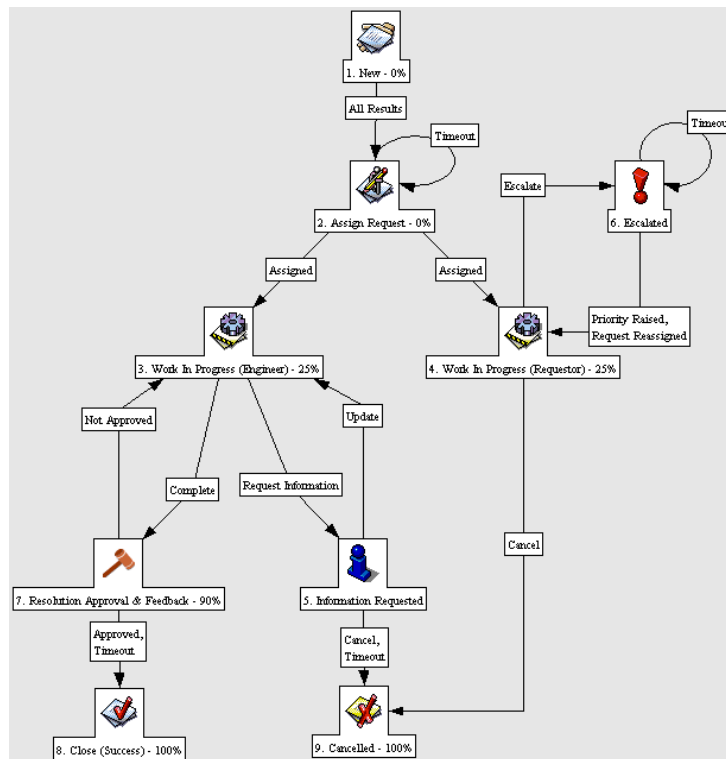


Figure 8-3. BAC provisioning request workflow

Table 8-3. BAC provisioning request workflow

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

To create a BAC provisioning request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Administrative Requests > BAC Provisioning**.

The Create New Request page appears, displaying the appropriate BAC provisioning request fields.

Create New COE - BAC Provisioning

Expand All Collapse All Submit Cancel

Header

Instructions ?

- Use this form to setup and configure environment for purposes of application on-boarding and management.
- The fields with * require your input.
- Please ensure that the information is complete and accurate.

Summary ?

Created By: Mark Sege Workflow Status: New

Priority: Medium

Contact Name: Contact Phone: Contact Email:

Project Reference ?

Master Project:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the BAC provisioning request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



Note

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

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

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

Filing IT Service Requests

The IT service request supplied by Mercury Performance Center Management is a request for general administrative or IT support. These requests are routed to the CoE's administrative or operations teams and is handled by either an application administrator for PC/BAC, IT Governance Center administrator, or system administrator. Unlike support requests, these requests are focused more on items such as:

- Application software
- Hardware configuration
- Upgrades
- Installations

The IT service request follows the workflow pictured in [Figure 8-4](#) and described in [Table 8-4](#).

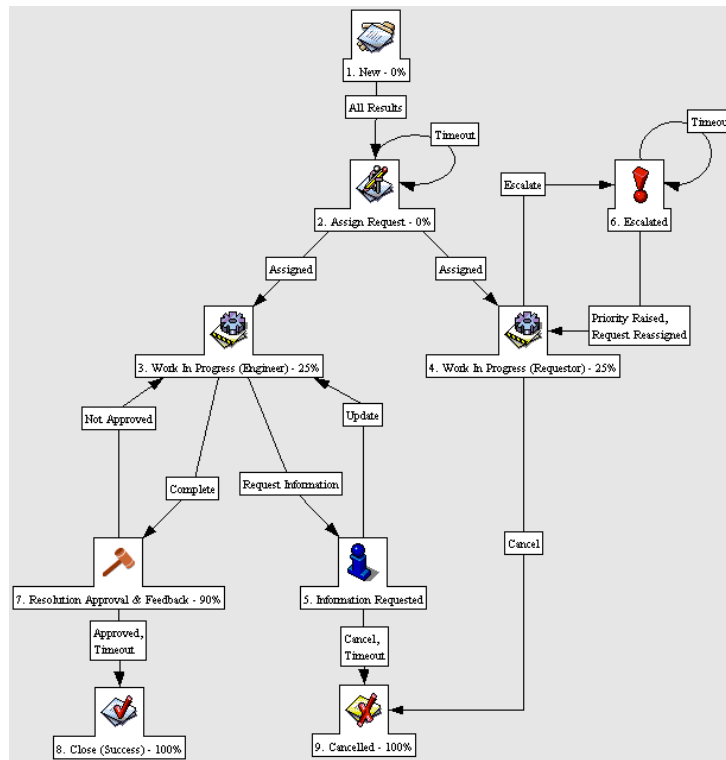


Figure 8-4. IT service request workflow

Table 8-4. IT service request workflow

Step	Description
New	A new IT service request is created.
Assign Request	The request is assigned to appropriate personnel for handling the request. The request is usually assigned to an appropriate administrator based on the category of the request, who coordinates the tasks with other appropriate administrators. A notification email is sent to CoE administrators requesting assignment of the request.
Work In Progress (Engineer)	The assigned engineer performs the required tasks to process and address the needs of the request.
Work In Progress (Requestor)	The requestor is provided the opportunity to track the request and escalate if necessary.

Table 8-4. IT service request workflow [continued]

Step	Description
Information Requested	Additional information is requested from the owner of the request. A notification email is sent to the requestor asking for additional information.
Escalated	The request has been escalated. It should be either reassigned or its priority raised, and appropriate action must be taken to expedite resolution for the request. Action should be taken by the administrative team, or project and technical account manager. A notification email is sent to CoE administrators requesting handling of request escalation.
Resolution Approval & Feedback	A resolution has been submitted, and is pending the requestor's approval and feedback. The requestor can complete the feedback section to provide service level metrics back to CoE management. If feedback is not provided within configured timeout interval (usually 7 days), the request is automatically closed. A notification email is sent to the requestor with status of request.
Close (Success)	The request has been completed.
Cancelled	The request was cancelled by the requestor, or the requestor was unresponsive to the demand for more information in order to properly process the request.

To create an IT service request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Center of Excellence > Administrative Requests > IT Service Request**.

The Create New Request page appears, displaying the appropriate IT service request fields.

Create New COE - IT Service Request

Expand All Collapse All Submit Cancel

Header

Instructions ?

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

General Information ?

Request Status: New

Created By: Mark Sage Priority: Medium

Requested For: Contact Phone: Contact Email:

Company: Department:

CC List:

3. In the request sections, complete the fields as required.

Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing the IT service request. For information concerning a specific field, click the **Help** icon next to the field (if available).

4. In the Notes section, enter additional information.

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

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

The Request Creation Confirmed page appears.



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

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

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

Viewing and Tracking Administrative Activity

Mercury Performance Center Management delivers pre-configured Dashboard content that gives you a comprehensive real-time view of current administrative activity.



Depending on your role in the CoE, you may find different portlets and Dashboard pages available to you. See [Distributing Dashboard Modules to Users by Role on page 43](#) for more details.

Viewing Open Administrative Requests

The CoE - IT Service - Open Administrative Requests portlet lists all requests of the following type that have the status **Open** or have no value in the Assigned To field, and displays the status of each in real time:

- Account setup request
- PC provisioning request
- BAC provisioning request
- IT service request

Figure 8-5 shows the CoE - IT Service - Open Administrative Requests portlet.

Req # Δ	Request Type	Description	Workflow Status	Assigned To	Priority	Created By	Created On	Last Updated By	Last Updated
30754	COE - IT Service ...	Copy SAP BW data from production to test instance	Open	Lisa Hansen	Medium	Lisa Hansen	7/18/05	workflow timeout service	8/15/05
30845	COE - IT Service ...	Need more load generators for running SAP GUI vusers	Open		Medium	Lisa Hansen	8/3/05	workflow timeout service	8/17/05

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Figure 8-5. CoE - IT Service - Open Administrative Requests portlet

The CoE - IT Service - Open Administrative Requests portlet appears by default as part of the pre-configured Dashboard content available for all users in the following roles (see [Distributing Dashboard Modules to Users by Role on page 43](#)), but it can be added to anyone’s Dashboard individually:

- CoE - CoE Manager
- CoE - CoE Administrative Manager

- CoE - CoE Product Administrator
- CoE - CoE ITG Administrator
- CoE - CoE System Administrator

Using the IT Service Center Dashboard Page

The **IT Service Center** Dashboard page is pre-configured Dashboard content available to users in the following roles:

- CoE - CoE Manager
- CoE - CoE Administrative Manager
- CoE - CoE Product Administrator
- CoE - CoE ITG Administrator
- CoE - CoE System Administrator

It contains several portlets that track and display metrics related to administrative activities in the performance CoE. *Figure 8-6* shows the **IT Service Center** Dashboard page.



Figure 8-6. IT Service Center Dashboard page

CoE - IT Service - Open IT Service Requests Portlet

The CoE - IT Service - Open IT Service Requests portlet lists all IT service requests that have the status **Open** or have no value in the Assigned To field, and

displays the status of each in real time. [Figure 8-7](#) shows the CoE - IT Service - Open IT Service Requests portlet.

Req #Δ	Category	Description	Workflow Status	Assigned To	Priority	Created By	Created On	Last Updated By	Last Updated
30754	Performance Center	Copy SAP BW data from production to test instance	Open	Lisa Hansen	Medium	Lisa Hansen	7/18/05	workflow timeout service	8/15/05
30845	Performance Center	Need more load generators for running SAP GUI users	Open		Medium	Lisa Hansen	8/3/05	workflow timeout service	8/17/05

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Figure 8-7. CoE - IT Service - Open IT Service Requests portlet

CoE - IT Service - Top Issues by Category Portlet

The CoE - IT Service - Top Issues by Category portlet lists all IT service requests categorized by the Category or Subcategory field, and displays the status of each in real time. [Figure 8-8](#) shows the CoE - IT Service - Top Issues by Category portlet.

Category	Subcategory	Total	% Total
Business Availability Center	Installation	2	18
Performance Center	Installation	2	18
Performance Center	Maintenance	2	18
Business Availability Center	Hardware	1	9
IT Governance	Configuration	1	9
Others	Others	1	9
Performance Center	Configuration	1	9
Performance Center	Hardware	1	9

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Figure 8-8. CoE - IT Service - Top Issues by Category portlet

CoE - IT Service - Issue Trending Portlet

The CoE - IT Service - Issue Trending portlet displays a line graph of IT service requests created over a given time period that have the status **New**, **Closed**, and **Open**. [Figure 8-9](#) shows the CoE - IT Service - Issue Trending portlet.

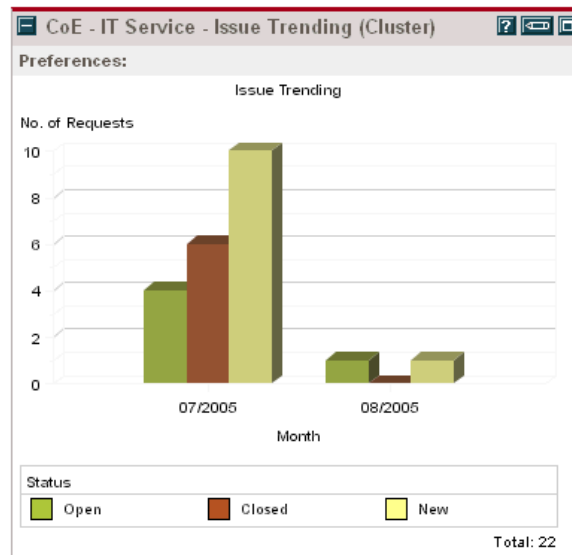


Figure 8-9. CoE - IT Service - Issue Trending portlet

CoE - IT Service - Trending by Administrative Type Portlet

The CoE - IT Service - Trending by Administrative Type portlet displays a line graph of all requests of the following type created over a given time period that have the status **New**, **Closed**, and **Open**:

- Account setup request
- PC provisioning request
- BAC provisioning request
- IT service request

Figure 8-10 shows the CoE - IT Service - Trending by Administrative Type portlet.

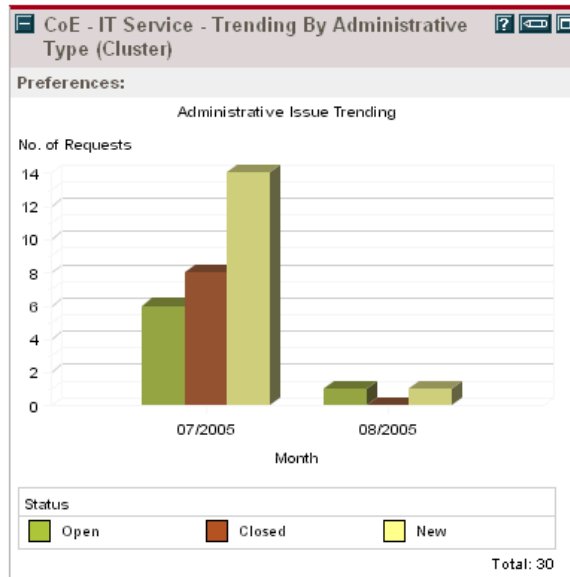


Figure 8-10. CoE - IT Service - Trending by Administrative Type portlet

CoE - IT Service - Issue Status Portlet

The CoE - IT Service - Issue Status portlet displays a pie chart of IT service requests differentiated by the Request Status field. [Figure 8-11](#) shows the CoE - IT Service - Issue Status portlet.

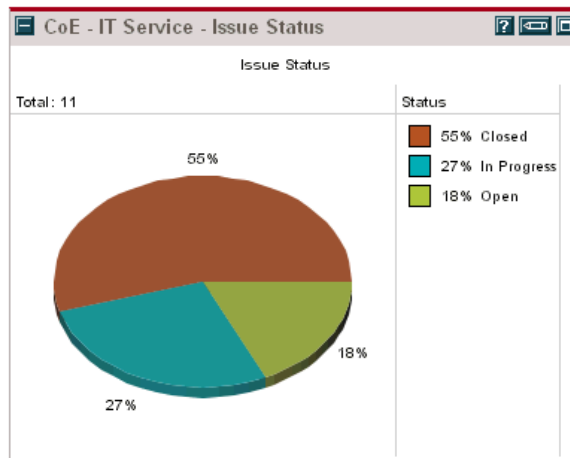


Figure 8-11. CoE - IT Service - Issue Status portlet

CoE - IT Service - Issue Priority Portlet

The CoE - IT Service - Issue Priority portlet displays a pie chart of IT service requests differentiated by the Priority field. *Figure 8-12* shows the CoE - IT Service - Issue Priority portlet.

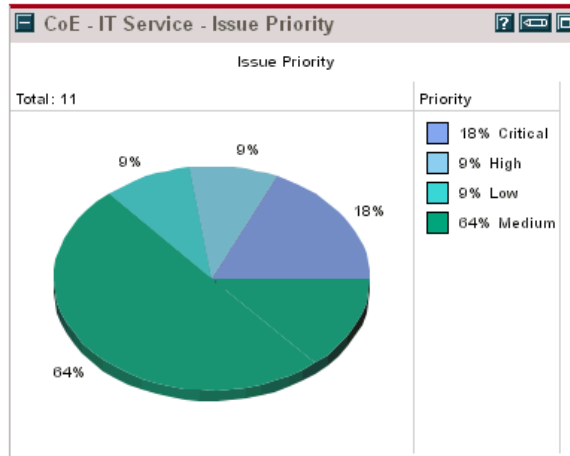


Figure 8-12. CoE - IT Service - Issue Priority portlet

CoE - IT Service - Customer Satisfaction Portlet

The CoE - IT Service - Customer Satisfaction portlet displays a bar chart of the average customer satisfaction score per month (over the previous six months) for all requests of the following type:

- Account setup request
- PC provisioning request
- BAC provisioning request
- IT service request

Figure 8-13 shows the CoE - IT Service - Customer Satisfaction portlet.

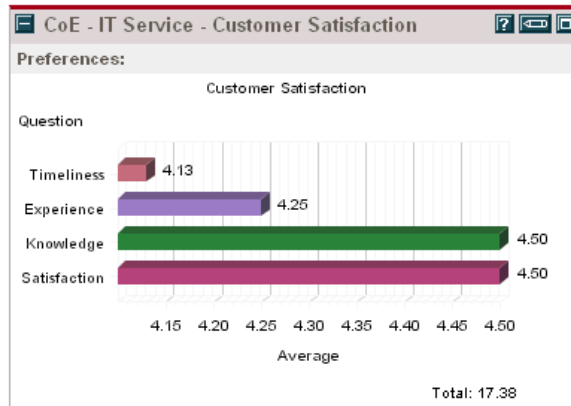


Figure 8-13. CoE - IT Service - Customer Satisfaction portlet

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