



Mercury IT Governance Center™
Mercury Portfolio Management™
Configuration Guide

Version: 6.0



MERCURY™



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Chapter 1 Introduction

In This Chapter:

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

About This Document

This guide provides instructions for configuring Mercury Portfolio Management™. Each chapter covers a particular topic:

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

Includes an overview of Mercury Portfolio Management and details the document's intended audience and related guides.
- [Chapter 2, *Configuring Global Portfolio Management Settings*, on page 15](#)

Introduces the process used to configure settings for Mercury Portfolio Management that take effect across the entire installation.
- [Chapter 3, *Customizing Mercury Portfolio Management Entities*, on page 19](#)

Describes the proposal, project, and asset entities provided with Mercury Portfolio Management and considerations for customizing them, as well as how to create new custom entities for use in Mercury Portfolio Management.
- [Chapter 4, *Configuring Mercury Portfolio Management Processes*, on page 33](#)

Provides an overview of processes delivered with Mercury Portfolio Management, and discusses considerations for customizing those processes to suit your business needs.
- [Chapter 5, *Using a Custom Mercury Portfolio Management Metric*, on page 45](#)

Discusses the use of a custom financial metric to measure success in Mercury Portfolio Management and how to configure it.
- [Chapter 6, *Adjusting the Scoring Key*, on page 51](#)

Describes the qualitative scoring key used to rate Mercury Portfolio Management entities and provides instructions for customizing it.
- [Chapter 7, *Enabling Users in Mercury Portfolio Management*, on page 71](#)

Discusses how to enable users in the Mercury IT Governance Center™ to use Mercury Portfolio Management entities and processes.

Who Should Read This Document

The intended audience for this document includes:

- Business or technical users who control the Mercury Portfolio Management system:
 - Configure global Mercury Portfolio Management settings
 - Decide on customizations to the Mercury Portfolio Management entities and processes
 - Adjust the Mercury Portfolio Management scoring key
- Business or technical users who configure and maintain a request resolution system
- Users responsible for workflow configuration related to your Mercury Portfolio Management processes

Related Documents

Related documents for this book are:

- *Getting Started*
- *Mercury Portfolio Management User's Guide*
- *Mercury Demand Management User's Guide*
- *Security Model Guide and Reference*
- *Mercury Demand Management: Configuring a Request Resolution System*
- *Configuring the Standard Interface*

Overview of Mercury Portfolio Management

Mercury Portfolio Management provides a real-time governance setup that supports your strategic, financial, functional, and technical requirements. Ideal for new initiatives that grow and transform your business as well as existing applications that run your business, Mercury Portfolio Management can help you align your IT portfolio with your business strategy and maximize portfolio value.

Mercury Portfolio Management allows business and IT stakeholders to collaboratively govern your portfolio with proper levels of review and approval. Mercury Portfolio Management monitors the entire portfolio lifecycle (proposal justification and review, project initiation, execution, deployment, and benefits realization) and enables stakeholders to make better portfolio decisions and analyze what-if scenarios using easy-to-build scenario comparisons.

Chapter

2

Configuring Global Portfolio Management Settings

In This Chapter:

- *Overview of Configuring Global Portfolio Management Settings*
 - *Setting Your Tracking Preferences*
 - *Setting Your Categorization Preferences*
-

Overview of Configuring Global Portfolio Management Settings

This chapter discusses general settings that must be configured before using Mercury Portfolio Management. In order to properly track the overall performance of your portfolio, you must configure your tracking preferences and categorization preferences.

Setting Your Tracking Preferences

Select the financial information you would like Mercury Portfolio Management to track. You can select to track the following metrics related to your proposals, projects and assets:

- ROI (Return on Investment)
- NPV (Net Present Value)
- A custom value
The custom value is a global value defined across the Mercury Portfolio Management installation that can be used in Mercury Portfolio Management visualizations. For more information on configuring the custom value, see [Using a Custom Mercury Portfolio Management Metric on page 45](#).

The selected metric(s) is tracked and used for analyses throughout the Mercury Portfolio Management system. Only fields and graphics related to the selected metrics are displayed.

To specify the financial metric(s) to track in Mercury Portfolio Management:

1. Log on to Mercury Portfolio Management.
2. Select **Portfolio Management > Administration > Configure Portfolio Management** from the menu bar.

The Configure Portfolio Management page opens.

Configure Portfolio Management

Tracking Preferences

Track the following financial metrics:

- Return On Investment
- Net Present Value
- Custom Field Value

Categorization Preferences

Proposals, Projects and Assets are categorized by:

- Project Class
- Asset Class

Done Cancel

3. Select the desired financial metric(s) from the Tracking Preferences checkboxes.

4. Click **Done**.

Setting Your Categorization Preferences

Proposals, projects, and assets can be arranged according to the following categories:

- Project Class
- Asset Class

The selected category is tracked throughout the Mercury Portfolio Management system. Only the filter fields and graphs related to the selected categories are displayed.

To specify the category to track in Mercury Portfolio Management:

1. Log on to Mercury Portfolio Management.

Select **Portfolio Management > Administration > Configure Portfolio Management** from the menu bar.

The Configure Portfolio Management page opens.

Configure Portfolio Management

Tracking Preferences

Track the following financial metrics:

Return On Investment

Net Present Value

Custom Field Value

Categorization Preferences

Proposals, Projects and Assets are categorized by:

Project Class

Asset Class

2. Select the desired category from the Categorization Preferences checkboxes.

You can select both if desired.

3. Click **Done**.

Chapter

3

Customizing Mercury Portfolio Management Entities

In This Chapter:

- *Overview of Customizing Mercury Portfolio Management Entities*
 - *Mercury Portfolio Management Entities*
 - *Proposal*
 - *Project*
 - *Asset*
 - *Creating Your Own Mercury Portfolio Management Entities*
 - *General Configuration Considerations*
 - *Copying Delivered Mercury Portfolio Management Entities*
 - *Using Mercury Portfolio Management Field Groups*
-

Overview of Customizing Mercury Portfolio Management Entities

This chapter describes the default Mercury Portfolio Management proposals, projects, and assets. It also provides instructions for configuring custom Mercury Portfolio Management entities for use by your business unit.

Mercury Portfolio Management Entities

Mercury Portfolio Management supplies pre-configured proposals, projects, and assets for use in creating and maintaining your portfolio. These entities integrate with pre-configured lifecycle processes also supplied with Mercury Portfolio Management, described in [Mercury Portfolio Management Processes on page 34](#). These entities can be considered “best practice” and come ready to use. They can be viewed and configured through the **Request Types** screen group in the Mercury IT Governance Workbench.

Proposal

A proposal collects information needed to propose a project, which will become part of the portfolio. The proposal is processed along the proposal process described in [Proposal Workflow on page 34](#). Once the proposal is approved, a corresponding project is automatically created, along with a companion budget, financial benefit, and staffing profile. See [Project on page 24](#) for more details on the project.

The default proposal includes the fields described in [Table 3-1](#), as well as other fields that may vary depending on your company’s business needs. The proposal entity can be altered as a request type through the Request Types window in the Workbench.

Table 3-1. Default proposal fields

Field	Description
Business Unit	The business unit from which this proposal originated.
Project Name	The name of the proposed project.
Project Class	The class of project this proposal belongs to (example: Innovation).

Table 3-1. Default proposal fields

Field	Description
Asset Class	The class of asset this proposal belongs to (example: Strategic).
Business Objective	The business objective with which the proposal is aligned.
Project Template	The project template being used by the project if the proposal is approved.
Project Manager	The of the project if the proposal is approved.
Budget	The proposed budget for the proposal.
Expected Benefit	Tracks the monetary benefit the proposal would provide.
Staffing Profile	Tracks the resource demand of the proposal.
Net Present Value	The NPV for the proposal.
Return on Investment	The ROI for the proposal.
(Custom Field Value)	If defined, the custom metric being used to rank the proposal.
Value Rating	The total qualitative Value calculated for the proposal.
Risk Rating	The total qualitative Risk calculated for the proposal.
Total Score	The total qualitative score (Value - Risk) calculated for the proposal. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this proposal, if any.



Note

While certain properties of these fields can be adjusted in the usual way through the request type window, other properties (such as their tokens) are vital to the functioning of Mercury Portfolio Management and cannot be altered. The rest of the fields in this Mercury Portfolio Management entity can be fully modified to suit your business needs. See [Configuration Considerations on page 22](#) and [Creating Your Own Mercury Portfolio Management Entities on page 27](#) for more information on customizing Mercury Portfolio Management entities.

Configuration Considerations

The following sections contain recommendations on altering the fields of the default proposal. For general recommendations on altering Mercury Portfolio Management entities, see [General Configuration Considerations on page 27](#).



For more detailed information on creating and modifying request type fields, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

Proposal Details

This is the summary information for the proposed project. Much of this section should be filled in at the time of initial entry by Mercury Portfolio Management users. In this section, you indicate the sponsors of the project, the reasons why the project should be done (the business objective, who will benefit, and so forth). Later on in the process, other information, such as the expected start date and what project template to use, will be entered.

Consider the following:

- Your company may have additional general information they want to capture about a proposed project. These fields can be created and added to this section, though they should be limited to five to ten new fields. For a case where Mercury Portfolio Management should be up and running very quickly, these new fields should be for information only and not be used to drive process, as process-oriented modifications involve alterations to the associated workflow and can take significant time to implement and test.
- Some of the default fields might not be relevant to the organization; for example, you might not need to know the vendors involved for a project. In these cases, the fields should be disabled, not deleted.
- The values for some of the fields (such as Project Class) might be changed to match the organization's current information by altering their validations. Note that changes to these validations will propagate to other parts of Mercury Portfolio Management, such as the portlets.
- You can make additional fields required at any point throughout the process (the default request type keeps required fields to a minimum).
- The Project Template field can be disabled from the start, since your company may not have installed Mercury Project Management™.

Business Case Details

As the proposal goes through the proposal process, the detailed business case needs to be fleshed out. This includes details on the budget, the staffing profile, and the expected benefits. Certain requirements and justification docs can also be attached in this section. Finally, this section contains the calculated totals of Risk and Value ratings, as well as a field to adjust the auto-calculated score.

Consider the following:

- This section can potentially have significant changes to it. The simplest of these changes would be to add/remove attachment fields if new or different documents are required for proposals.
- The business case fields can be disabled if needed — do not delete them entirely — but it is recommended that you keep them enabled. Even if not required, these are important bits of information that a business unit should start gathering to fully understand a project and its expectations, before approving it. Additionally, certain portlets use the information in these fields and cannot be used if the information is not filled out.
- Additional fields can be added to further flesh out the business case, though this information will be for information only. Fields can be created that count in automatic Risk or Value rating calculations. See [Adjusting the Scoring Key on page 51](#) for more detailed information.

Value and Risk Ratings

This section lets an organization (usually a IT/Business Ops Council) rate the proposed project on a set of business criteria. Questions here are focused on the expected results of the project as well as its alignment to company goals.

Consider the following:

- While the default criteria represent best-practice categories in valuing a project, you may want to add other criteria, remove criteria, or change the valid values of the current questions. See [Adjusting the Scoring Key on page 51](#) for more detailed information.
- You may also want to change the weights of the criteria. See [Adjusting the Scoring Key on page 51](#) for more detailed information.

Project

This entity tracks information and progress on a project as it is executed. The project is processed along the project process described in [Project Workflow on page 37](#). When the project is completed, a corresponding asset is created, along with a companion budget, financial benefit, and staffing profile. See [Asset on page 26](#) for more details on the asset.

The default project includes the fields described in [Table 3-2](#), as well as other fields that may vary depending on your company’s business needs. The project entity can be altered as a request type through the Request Types window in the Workbench.

Table 3-2. Default project fields

Field	Description
Business Unit	The business unit in charge of the portfolio this project is a part of.
Project Name	The name of the project.
Project Health	The status of the project.
Project Class	The class of project this project belongs to (example: Innovation).
Asset Class	The class of asset this project belongs to (example: Strategic).
Business Objective	The business objective with which the project is aligned.
Project Sponsor	The user sponsoring the project.
Project Plan	The project plan in Project Management that is associated with the project.
Project Manager	The of the project.
Budget	The budget for the project.
Financial Benefit	Tracks the monetary benefit the project provides.
Staffing Profile	Tracks the resource demand of the project.
Net Present Value	The NPV for the project.
Return on Investment	The ROI for the project.

Table 3-2. Default project fields

Field	Description
(Custom Field Value)	If defined, the custom metric being used to rank the project.
Value Rating	The total qualitative Value calculated for the project.
Risk Rating	The total qualitative Risk calculated for the project.
Total Score	The total qualitative score (Value - Risk) calculated for the project. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this project, if any.



Note

While certain properties of these fields can be adjusted in the usual way through the request type window, other properties (such as their tokens) are vital to the functioning of Mercury Portfolio Management and cannot be altered.

The rest of the fields in this Mercury Portfolio Management entity can be fully modified to suit your business needs. See [Configuration Considerations on page 25](#) and [Creating Your Own Mercury Portfolio Management Entities on page 27](#) for more information on customizing Mercury Portfolio Management entities.

Configuration Considerations

You may wish to add additional project milestone and planning information to the project. It is recommended that you create a new section in the project request type and put the new fields there.

For general recommendations on altering Mercury Portfolio Management entities, see [General Configuration Considerations on page 27](#).



Note

For more detailed information on creating and modifying request type fields, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

Asset

This entity tracks information on a portfolio asset, typically a maintenance activity rather than a straightforward project execution. The asset is tracked along the asset process described in [Asset Workflow on page 39](#).

The default asset includes the fields described in [Table 3-3](#), as well as other fields that may vary depending on your company’s business needs. The asset entity can be altered as a request type through the Request Types window in the Workbench.

Table 3-3. Default asset fields

Field	Description
Business Unit	The business unit in charge of the portfolio this asset is a part of.
Asset Name	The name of the asset.
Asset Health	The status of the asset.
Project Class	The class of project this asset belongs to (example: Innovation).
Asset Class	The class of asset this asset belongs to (example: Strategic).
Business Objective	The business objective with which the asset is aligned.
Project Plan	The project plan in Project Management that is associated with the asset.
Budget	The budget for the asset.
Financial Benefit	Tracks the monetary benefit the asset provides.
Staffing Profile	Tracks the resource demand of the asset.
Net Present Value	The NPV for the asset.
Return on Investment	The ROI for the asset.
(Custom Field Value)	If defined, the custom metric being used to rank the asset.
Value Rating	The total qualitative Value calculated for the asset.
Risk Rating	The total qualitative Risk calculated for the asset.
Total Score	The total qualitative score (Value - Risk) calculated for the asset. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this asset, if any.



Note

While certain properties of these fields can be adjusted in the usual way through the Request Type window, other properties (such as their tokens) are vital to the functioning of Mercury Portfolio Management and cannot be altered.

The rest of the fields in this Mercury Portfolio Management entity can be fully modified to suit your business needs. See [Configuration Considerations on page 27](#) and [Creating Your Own Mercury Portfolio Management Entities on page 27](#) for more information on customizing Mercury Portfolio Management entities.

Configuration Considerations

You may wish to add additional operations information to the asset. It is recommended that you create a new section in the asset request type and put the new fields there.

For general recommendations on altering Mercury Portfolio Management entities, see [General Configuration Considerations on page 27](#).



Note

For more detailed information on creating and modifying request type fields, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

Creating Your Own Mercury Portfolio Management Entities

Though Mercury Portfolio Management contains pre-configured proposals, projects, assets, and lifecycle processes that drive their resolution, you may wish to create your own proposals, projects, or assets for use in Mercury Portfolio Management.

General Configuration Considerations

Consider the following when making changes to any Mercury Portfolio Management entities:

- Any changes made to one entity's fields (such as the PFM–Proposal request type) should be made to the others (PFM–Project and PFM–Asset request types).

- You might choose to remove or add request statuses. If so, the changes need to be made in the request type and in the workflow. It is recommended that you keep things simple, keep high-level statuses in mind, and not have a unique status for every workflow step.
- Request type rules are used for the automatic calculation of qualitative scores, but not to default any other information. If used for this purpose, they should be used sparingly to limit the complexity and effort of configuration. Default rules for qualitative scoring calculation should not be modified except as described in [Adjusting the Scoring Key on page 51](#).

Copying Delivered Mercury Portfolio Management Entities

Mercury Portfolio Management delivers pre-configured proposal, project, and asset entities that come ready to use. These entities can be copied using the **Request Types** screen group in the Workbench. You can then make modifications to the copies, keeping in mind the limitations on changing certain fields described in [Mercury Portfolio Management Entities on page 20](#).

For more detailed information on copying request types and modifying request type fields, consult the *Mercury Demand Management: Configuring a Request Resolution System* document.

The general process for creating your own Mercury Portfolio Management entities using this method is as follows:

1. Copy the desired Mercury Portfolio Management entity using the **Request Types** screen group in the Workbench.
2. In the Request Type window, make the desired modifications to the newly copied request type.
3. In the copied request type's **Workflows** tab, make sure the request type is enabled for use with the appropriate Mercury Portfolio Management workflow.
4. Open the associated Mercury Portfolio Management workflow and make sure the copied request type is enabled for use in the workflow's **Request Types** tab.

Once these steps are completed, Mercury Portfolio Management should function with your new request type in place of or alongside the default pre-configured request type.

Using Mercury Portfolio Management Field Groups

It is possible that your company may have developed its own processes for portfolio-related business matters, and that these processes were implemented as workflows with associated request types in the Mercury IT Governance Center. These request types can be modified for use with Mercury Portfolio Management by adding field groups. Mercury Portfolio Management field groups are listed in [Table 3-4](#).

Table 3-4. Mercury Portfolio Management request type field groups

PFM Request Type	Field Group
PFM - Proposal	Portfolio Management proposal
PFM - Project	Portfolio Management project
PFM - Asset	Portfolio Management asset

Multiple request types can be used with a single Mercury Portfolio Management workflow. The reverse is also true; for more information on request type/workflow interaction, see the *Key Concepts* document.

The general process for modifying an existing request type for use in Mercury Portfolio Management is as follows:

1. Determine the existing request type that should be modified for use with Mercury Portfolio Management.
2. When the request type has been identified, examine the request header type associated with it.

Field groups are associated with request types through the request header type. If the request header type being used is also associated with other request types, all of those request types will also become enabled for use in Mercury Portfolio Management.

3. Determine the type of Mercury Portfolio Management entity (proposal, project, or asset) this existing request type will be used as.
4. Link the appropriate Mercury Portfolio Management field group to the request header type linked to the target request type.

See [Adding Mercury Portfolio Management Field Groups to a Request Type](#) for more detailed information.

5. In the target request type's **Workflows** tab, make sure the request type is enabled for use with the appropriate Mercury Portfolio Management workflow.
6. Open the associated Mercury Portfolio Management workflow and make sure the target request type is enabled for use in the workflow's **Request Types** tab.

Once these steps are completed, Mercury Portfolio Management should function with your request type in place of or alongside the default pre-configured request type.



Note

When field groups are associated with existing request types (through the request header type definition), tables in the Mercury IT Governance database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the database statistics on your Mercury IT Governance database. Instructions for this are included in the *System Administration Guide and Reference*. Contact your system administrator for help with this procedure.

Adding Mercury Portfolio Management Field Groups to a Request Type

In order to function in Mercury Portfolio Management, pre-existing request types must have a Mercury Portfolio Management field group associated with them.

To associate a Mercury Portfolio Management field group with a pre-existing request type:

1. Select or create a request type.
2. Open the Request Type window.
3. Click **Open** under the Request Header Type field.

The specified Request Header Type window opens.

Request Header Type : Default

Request Header Type Name: Default

Description: Default Request Header Type

Extension: [Dropdown] Enabled: Yes No

Fields | Layout | Filter | Ownership | User Data | References

Prompt	Display	Display Only	Transaction Hist.	Notes Hist.	On Search/Filter Page
[-] Summary					
[-] Request No.:	Y	Y	N	N	N
[-] Request Type:	Y	N	N	N	Y
[-] Created By:	Y	Y	N	N	Y
[-] Department:	Y	N	N	N	Y
[-] Sub-Type:	Y	N	N	N	Y
[-] Created On:	Y	Y	N	N	Y
[-] Workflow:	Y	N	N	N	Y
[-] Request Status:	Y	Y	N	N	Y

+All -All New Edit Remove Field Groups

OK Save Cancel

Ready

4. Click **Field Groups**.

The Field Groups window opens.

Field Groups

Please enable the Field Groups necessary for the desired functionality of this Request Header Type:

Enabled	Description
<input type="checkbox"/>	Demand Management SLA Fields: This Field Group contains the fields necessary to manage requests with SLA.
<input type="checkbox"/>	Demand Management Scheduling Fields: This Field Group allows a request to be scheduled with the Demand Management solution.
<input type="checkbox"/>	Master Project Reference on Request: Contains a field that allows a user to add a Project reference to a Request.
<input type="checkbox"/>	PFM Asset: Allows Requests to be considered as Assets in a Portfolio.
<input type="checkbox"/>	PFM Project: Allows Requests to be considered as Projects in a Portfolio.
<input type="checkbox"/>	PFM Proposal: Allows Requests to be considered as Proposals in the Portfolio Management process.
<input type="checkbox"/>	PMO Program Issue: Allows Requests to be considered as Issues in a Program.
<input type="checkbox"/>	PMO Program Resource Request: Allows Requests to be considered as Resource Requests in a Program.
<input type="checkbox"/>	PMO Program Risk: Allows Requests to be considered as a Risk in a Program.
<input type="checkbox"/>	PMO Program Scope Change: Allows Requests to be considered as a Scope Change in a Program.
<input type="checkbox"/>	Program Reference on Request: Contains a field that allows a user to add a Program reference to a Request.
<input type="checkbox"/>	Quality Center Info: Allows Requests to use the special integration with Quality Center
<input type="checkbox"/>	Work Item Fields: These fields allow requests to be tracked as load in Resource Management visualizations.

OK Cancel

Ready

5. Select the Mercury Portfolio Management field group to attach to your request header type.



Note

Only add one Mercury Portfolio Management field group to the request header type. Once multiple field groups have been added, you will not be able to save the request header type and will have to cancel out of the Request Header Type window, losing any modifications made up to that point.

6. Click **OK**.

The selected field groups appear on the request header type.

7. Save the request header type and the request type.



Note

When field groups are associated with existing request types (through the request header type definition), tables in the Mercury IT Governance database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the database statistics on your Mercury IT Governance database. Instructions for this are included in the *System Administration Guide and Reference*. Contact your system administrator for help with this procedure.

Configuring Mercury Portfolio Management Processes

In This Chapter:

- *Overview of Configuring Mercury Portfolio Management Processes*
 - *Mercury Portfolio Management Processes*
 - *Proposal Workflow*
 - *Project Workflow*
 - *Asset Workflow*
 - *Process Customization Considerations*
 - *Request Statuses and Workflow Steps*
 - *Spawning a New Request*
-

Overview of Configuring Mercury Portfolio Management Processes

This chapter discusses the pre-configured resolution processes delivered with Mercury Portfolio Management and provides technical considerations for customizing them. These processes are integrated with the pre-configured entities (proposals, projects, assets) also supplied with Mercury Portfolio Management. Though these processes can be considered “best practice” and come ready to use, they can also be modified or copied to best suit your business needs.

Mercury Portfolio Management Processes

Mercury Portfolio Management features pre-configured resolution processes designed to integrate with the proposal, project, and asset entities, described in [Mercury Portfolio Management Entities on page 20](#). These processes can be viewed and configured using the **Workflows** Workbench.

Proposal Workflow

The proposal workflow defines the lifecycle of a proposal as its business case is built out and the proposal is rated and evaluated. [Figure 4-1](#) shows the workflow.

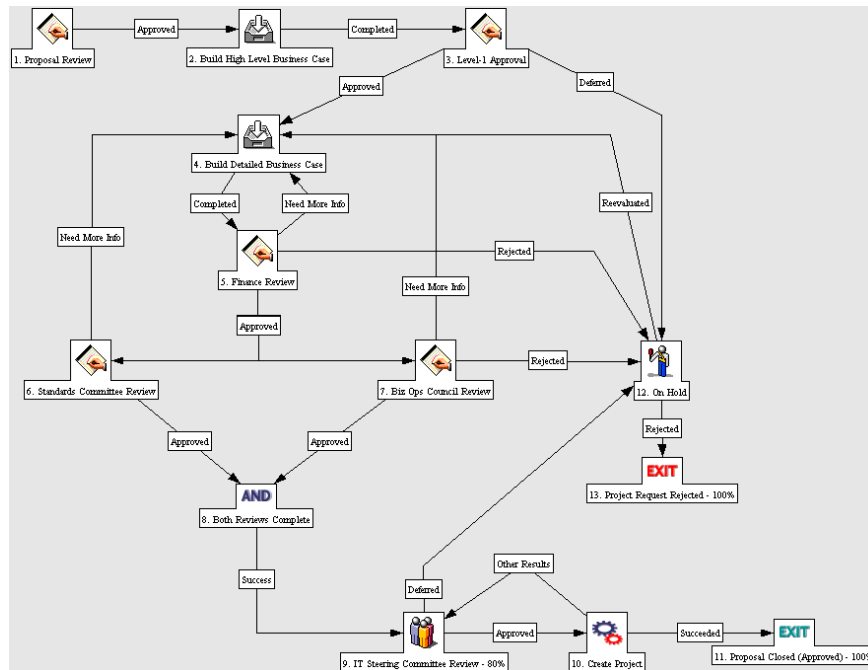


Figure 4-1. Proposal workflow

The default workflow walks through the following steps:

Step One: Initial Review

This is a quick review of the initial request to see if it even warrants going through the proposal process.

Step Two: Build High-Level Business Case

The high-level business case for the proposal is built here in preparation for the next step.

Step Three: Level-1 Approval

The high-level business case is reviewed before the effort is spent building the proposal's detailed business case.

Step Four: Build Detailed Business Case

Here the designated owner of the proposal (usually an assigned business analyst) enters details for the project, including the high level project budget, the resource requirements (staffing profile) and an estimated financial benefit.

Step Five: Finance Review

After the business case has been built, either the formal finance group or the finance part of IT reviews the business case for overall validity and a sanity-check in terms of ROI.

Step Six: Biz Ops Council Review/Standards Committee Review

Once it passes the finance review, the proposal goes for a business and a technical review by the appropriate committees. These committees will both review the proposal as well as fill out appropriate value and risk criteria.

Step Seven: Steering Committee Review

After passing a resource review, the proposal goes to the IT Steering Committee. This committee looks at the proposal in the context of work already being performed and other proposals on their plate. They also look at relative ratings and rankings. They may also use the Mercury Portfolio Management scenario comparison functionality to do what-if analyses of different portfolio mixes.

Step Eight: Create Project

If the proposal makes it past the steering committee, a project is spawned, meaning that the project has been approved and is ready for planning and execution. The project begins moving along the *Project Workflow* as the proposal is closed.

Configuration Considerations

Consider the following when making changes to the proposal workflow:

- The default process has many different committee reviews and approvals. These can easily be removed if your company's review and approval process is simpler or more consolidated. Note that the request status changes in the default steps, and ensure that the reconfigured process goes through the desired request statuses. See *Request Statuses and Workflow Steps on page 41* for more detailed discussion of request statuses and workflows.
- You can also add steps, change step names, and modify notifications, though it is recommended that the proposal process be kept at a high level, such as under fifteen steps. The "Create Project" and "Proposal Canceled" steps should be kept in the final workflow to take full advantage of Mercury Portfolio Management functionality. See *Spawning a New Request on page 42* for more details.

- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. For more information on populating security groups, see [Enabling Users in Mercury Portfolio Management on page 71](#).

Project Workflow

The project workflow presents the very high level stages of a project being implemented. All steps are updated manually either by the project to signal the completion of a stage or by approvers who verify that the stage is complete.

[Figure 4-2](#) shows the workflow.

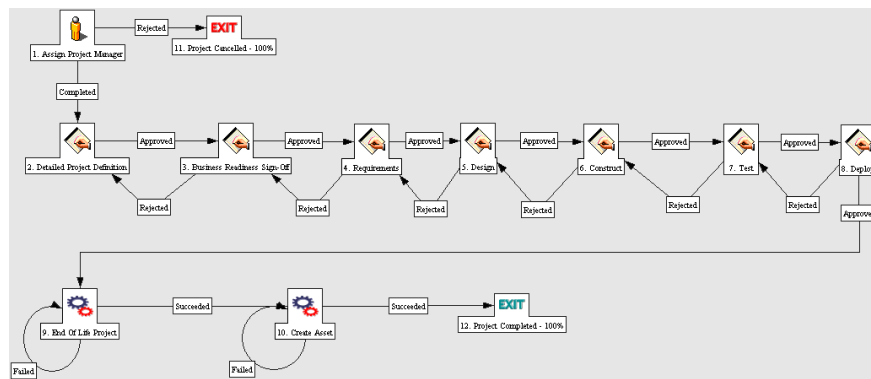


Figure 4-2. Project workflow

The default workflow walks through the following steps:

Step One: Assign Project Manager

At this step, a project should be assigned to the project to manage and coordinate the remaining tasks and deliverables.

Step Two: Detailed Project Definition

During this step, the project works with the appropriate team members and stakeholders to build the detailed definition of the project. This may include revisions to the staffing profile, budget, and financial benefit entries for the project. A detailed project plan should be created at this step as well.

Step Three: Business Readiness Sign-Off

At this step, the appropriate stakeholders and IT management are required to signoff on the detailed project definition created in the previous step.

Step Four: Design

Once the project is approved, members of the project team design the final output. This step is complete when the project team is ready to begin implementing the end solution of the project.

Step Five: Construct

This step indicates that the project is in implementation phase. This step is complete when the solution is ready for testing.

Step Six: Test

This is the final system and integration testing phase. Rework is done here unless major changes need to be made, in which case the process returns to Implementation. Otherwise, when testing is done, the step is marked as completed (or approved).

Step Seven: Deploy

During this step, the project output(s) are released to production.

Step Eight: End of Life Project

This step is the final signoff and approval of the project. This indicates that the project is complete and can be moved into a maintenance phase.

Step Nine: Create Asset

Following completion of the project, an asset is automatically generated and begins moving along the *Asset Workflow* as the project is closed. The asset is responsible for tracking on-going maintenance and other activities against the end result of the project.

Configuration Considerations

Consider the following when making changes to the project workflow:

- You may wish to significantly change the project workflow to represent the major project phases at your company. You will need to make sure the request statuses are updated to be in synch with any project workflow changes. See *Request Statuses and Workflow Steps* on page 41 for more detailed discussion of request statuses and workflows.
- You can also add steps, change step names, and modify notifications, though it is recommended that the project stages be tracked at a high level, such as under fifteen steps, and not meant to emulate a detailed project plan. The “End of Life Project” and “Create Asset” steps should be kept in

the final workflow to take full advantage of Mercury Portfolio Management functionality. See [Spawning a New Request on page 42](#) for more details.

- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. For more information on populating security groups, see [Enabling Users in Mercury Portfolio Management on page 71](#).

Asset Workflow

The asset workflow represents the annual entry and review cycle of an application asset. It is meant to cycle through the various steps periodically until the application reaches the end of its life and is removed from production. Assets should be tracked at an aggregate level rather than for every single application (for example, ERP should be a single asset rather than tracking operations work at each individual module). You should have assets in the tens rather than in the hundreds. [Figure 4-3](#) shows the workflow.

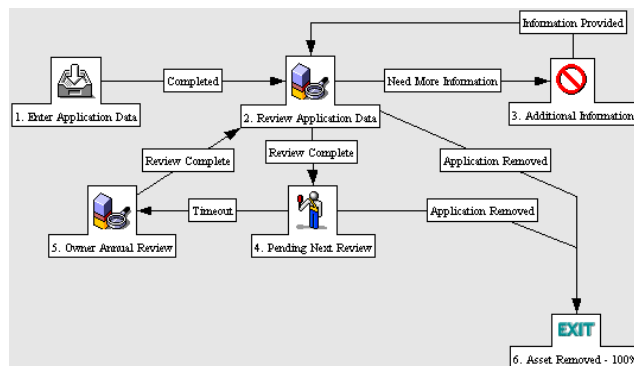


Figure 4-3. Asset workflow

The default process walks through the following steps:

Step One: Enter Application Data

Initial asset information is entered, including budget, resource, and benefit information.

Step Two: Review Application Data

The asset information is validated, resulting in more information requested or sign off.

Step Three: Pending Next Review

An asset at this step has passed its last review and is simply waiting until the next review. It will automatically move to the next step at the configured time interval.

Step Four: Owner Annual Review

This review encourages the owner of an asset to think about whether or not they need to keep maintaining it. Even though the business unit might not be changing anything or running any projects against it, they should evaluate it on at least an annual basis, which might include updates to financial benefit, budget, or staffing profile.

Configuration Considerations

Consider the following when making changes to the asset workflow:

- This process is extremely basic and may not require much change, but you may wish to change time intervals between reviews.
- You can also add steps, change step names, and modify notifications, though you will need to make sure the request statuses are updated to be in synch with any asset workflow changes. See [Request Statuses and Workflow Steps on page 41](#) for more detailed discussion of request statuses and workflows.
- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. For more information on populating security groups, see [Enabling Users in Mercury Portfolio Management on page 71](#).

Process Customization Considerations

The process delivered with Mercury Portfolio Management can be customized to suit any business procedure through the **Workflows** Workbench. Before making any configuration changes, note the following information:

- [Request Statuses and Workflow Steps](#)
- [Spawning a New Request](#)

Request Statuses and Workflow Steps

The pre-configured processes delivered with Mercury Portfolio Management integrate with the proposal, project, and asset entities that are provided. No special configuration is required to make them work together.

Each entity's request type contains Statuses that are linked to steps in their associated workflows.

For example, the proposal request type contains statuses such as “Build Business Case,” “Finance Review,” and “Standards Review,” which correspond to individual steps in the proposal workflow.

You can create your own proposals, projects, or assets for use in Mercury Portfolio Management through the **Request Type** screen group in the Workbench interface. For more detailed information on creating your own Mercury Portfolio Management entities, see [Creating Your Own Mercury Portfolio Management Entities on page 27](#).

If you are going to use a custom request type for a particular workflow, make sure the request type contains the statuses necessary for each workflow step. This is controlled from the **Request Status** tab in the Request Type window in the Workbench. [Figure 4-4](#) shows the **Request Status** tab.

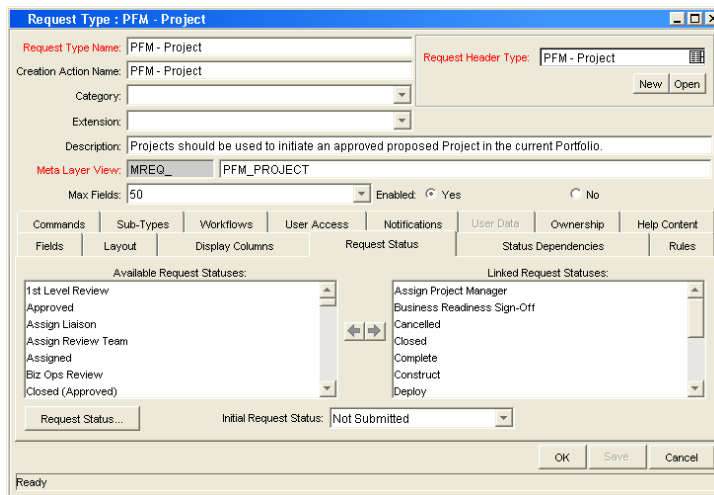


Figure 4-4. Request Type window - Request Status tab

Alternatively, you could make the workflow steps link to the statuses already in the target request type. This is controlled from the **Properties** tab of the Workflow Step window in the Workbench interface. [Figure 4-5](#) shows the **Properties** tab.

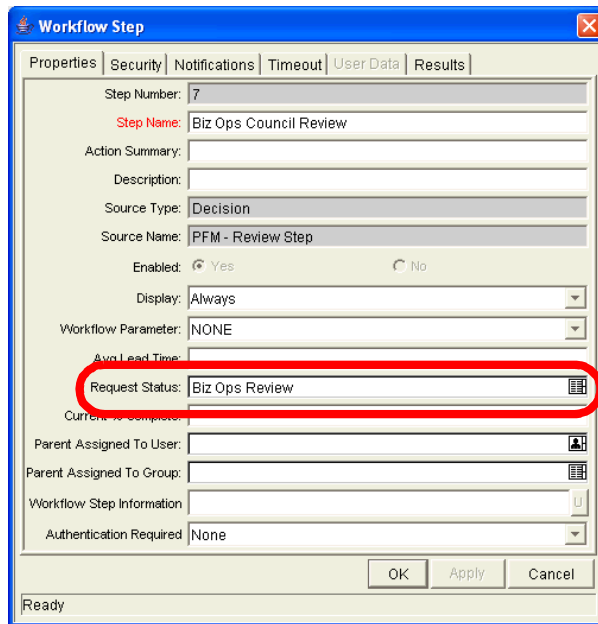


Figure 4-5. Workflow Step window - Properties tab - Request Status field

For more information on workflow steps and request statuses, consult the *Mercury Demand Management: Configuring a Request Resolution System* document.

Spawning a New Request

The last step in the pre-configured proposal and project workflows is a **Built-In Workflow Event** execution step of the type **create_request**, configured to spawn a new project or asset, respectively:

- In the proposal workflow, the “Create Project” step creates a project.
- In the project workflow, the “Create Asset” step creates an asset.
- In both cases, the budgets and staffing profiles attached to the existing proposal or project are also copied automatically and attached to the new project or asset.

If multiple request types have been configured for use in Mercury Portfolio Management as projects, or assets, make sure that they are listed as choices in the **create_request** step.

For example, ACME Corporation has configured two additional request types to be used as project requests. Harold, ACME’s workflow configuration expert, enables these request types in the proposal workflow’s last step.

Removing the **create_request** step from the proposal or project workflows will not have an adverse effect on Mercury Portfolio Management itself, but doing so will mean users cannot take advantage of the automated functionality this step provides.

Re-adding the **create_request** step into the proposal or project workflows requires no additional configuration to work properly with Mercury Portfolio Management.

If you are creating a new workflow from scratch for use with Mercury Portfolio Management and wish to incorporate a **create_request** step at the end that will spawn a new project or asset, no additional configuration is necessary beyond specifying the proper request types to choose from. When in use, the **create_request** step will automatically copy the appropriate budget and staffing profile and carry over the appropriate field data.

Chapter

5

Using a Custom Mercury Portfolio Management Metric

In This Chapter:

- *Overview of Using a Custom Mercury Portfolio Management Metric*
 - *Configuring the Custom Mercury Portfolio Management Metric*
 - *Example Custom Metrics*
-

Overview of Using a Custom Mercury Portfolio Management Metric

This chapter discusses how to configure the Custom Value field for use in Mercury Portfolio Management.

Mercury Portfolio Management provides pre-configured fields that show the following industry-standard measurements of project success:

- Return on Investment (ROI)
- Net Present Value (NPV)

Mercury Portfolio Management also provides a blank Custom Value that can be used to measure proposal, project, and asset performance in place of or alongside ROI and NPV. It also appears in Mercury Portfolio Management visualizations.

Configuring the Custom Mercury Portfolio Management Metric

The general procedure for configuring the Custom Value consists of the following steps:

1. Enable the Custom Value field for use in Mercury Portfolio Management.
2. Enable the Custom Value field for display.
3. Configure a request type rule that defines the population of the Custom Value field.



It is recommended that the Custom Value field be a numeric text field. Fields of other types may not appear in Mercury Portfolio Management visualizations.

To enable the Custom Value for use in Mercury Portfolio Management:

1. Activate the Custom Value using the Configure Portfolio Management page.
 - a. Log on to Mercury Portfolio Management.

- b. Select **Portfolio Management > Administration > Configure Portfolio Management** from the menu bar.

The Configure Portfolio Management page opens.

The screenshot shows the 'Configure Portfolio Management' window. It has a title bar and two main sections. The first section is 'Tracking Preferences' with a sub-header 'Track the following financial metrics:'. It contains three checkboxes: 'Return On Investment' (checked), 'Net Present Value' (unchecked), and 'Custom Field Value' (unchecked). The second section is 'Categorization Preferences' with a sub-header 'Proposals, Projects and Assets are categorized by:'. It contains two checkboxes: 'Project Class' (checked) and 'Asset Class' (checked). At the bottom right, there are 'Done' and 'Cancel' buttons.

- c. Select Custom Value from the Tracking Preferences checkboxes.
- d. Click **Done**.

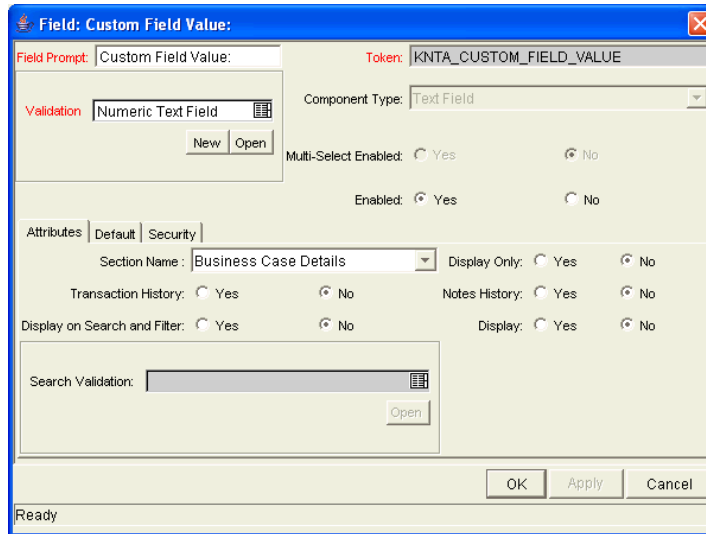
2. Enable the Custom Value field for display.

- a. Select **Administration > Open Workbench** from the menu bar.
- b. Open the Mercury Portfolio Management request type that will use the Custom Value.
- c. Click **Open** under the Request Header Type field.

The specified Request Header Type window opens.

- d. In the **Fields** tab, select the Custom Value field and click **Edit**.

The Field window opens.



- e. In the **Attributes** tab, set Display = **Yes**.
 - f. In the general information region, change the Field Prompt to the desired Custom Value name.
 - g. Click **OK**.
3. Configure a request type rule that will populate a value into the Custom Value field.
 - a. Open the Mercury Portfolio Management request type that will use the Custom Value.
 - b. Click the **Rules** tab.
 - c. Click **New** to define a request type rule for the Custom Value field.

See [Example Custom Metrics on page 49](#) for examples of rules used to govern the calculation of the Custom Value.

For more detailed information on creating request type rules, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

4. Save the request type.

5. Repeat for any other Mercury Portfolio Management request types that will use the Custom Value.

The Custom Value is ready to be used, and will appear in the appropriate Mercury Portfolio Management visualizations and analyses.

Example Custom Metrics

Some examples of Custom Value metrics that can be used alongside or in place of ROI and NPV include:

- **Payback Period**
This metric calculates how long it will be before a proposal, project, or asset starts to see positive cost/benefit values, based on its benefits and budget.
- **Productivity Index**
This metric is a financial ranking approach that takes into account expected commercial value, technical risk, and research and development expenditures.
- **Expected Commercial Value**
This metric leverages probabilities and resource constraints to arrive at its answer.



Note

Depending on the business unit deploying them, these example metrics may employ one of several different formulae in their calculation. Consult the appropriate business lead or team for the metric and formula you wish to implement.

Additionally, configuring a custom metric may require knowledge of SQL or the creation of additional custom fields on each entity in order for the metric value to calculate itself effectively.

Chapter

6

Adjusting the Scoring Key

In This Chapter:

- *Overview of Adjusting the Scoring Key*
 - *Scoring Key Structure*
 - *Scoring Key Validations*
 - *Scoring Key Formulae (Rules)*
 - *Adjusting the Scoring Key*
 - *Changing Criterion Properties*
 - *Changing a Criterion Name*
 - *Adding a New Criterion*
 - *Examples*
-

Overview of Adjusting the Scoring Key

This chapter discusses the structure of the Mercury Portfolio Management qualitative scoring key and provides instructions for modifying it.

Proposals, projects, and assets can be ranked according to criteria that are not captured by purely numeric values of cost, resource requirement, and benefit. These qualitative rankings are captured using other fields provided with the Mercury Portfolio Management entities. Each field is associated with a weighted value, and the total of all the weighted values yields a qualitative score for the given proposal, project, or asset.

The underlying scoring mechanism is set up using the scoring key and validations. A user with the proper level of access can easily modify these rankings or add custom criteria based on their specific requirements by manipulating the scoring key and using the proper validation for a field.

Scoring Key Structure

Proposals, projects, and assets can be evaluated using qualitative criteria that cannot be calculated purely numerically. These can include such things as how much technical risk exists, what the strategic match for a given project is, and how much competitive advantage would be gained. *Figure 6-1* shows a typical scoring key, which includes two domains of scoring criteria.

View Scoring Criteria

Scoring Keys			
Risk Domain			
Weight	Criterion	Value	Selection
3	Technical Risk	0	No uncertainty.
		1	Very low uncertainty.
		2	Low uncertainty.
		3	Medium uncertainty.
		4	High uncertainty.
2	Architecture Risk	0	Utilizes standard architecture.
		1	Minor change to standard architecture.
		2	Medium change to standard architecture.
		3	Major change to standard architecture.
		5	No leverage of standard architecture.
2	Definition Risk	0	Requirements are firm. No changes.
		1	Requirements are moderately firm. Low probability of changes.
		2	Requirements are moderately firm. Medium probability of changes.
		3	Requirements are moderately firm. High probability of changes.
		4	Requirements are not firm.
1	Infrastructure Risk	0	Uses existing systems and services.
		1	Small changes to existing infrastructure.
		2	Small changes and additions are expected.
		3	Moderate changes are expected.
		4	Moderate changes to multiple systems are expected.
1	Organization Risk	0	No risk.
		1	Low risk.
		2	Medium low risk.
		3	Medium risk.
		4	High risk.
5	Extreme risk.		

Value Domain			
Weight	Criterion	Value	Selection
10	Internal Rate of Return	0	Zero or less.
		1	1 - 5.99%
		2	6 - 9.99%
		3	10 - 14.99%
		4	15% and above.
5	Competitive Advantage	0	No client or market impact.
		1	Improves operating efficiencies that affect competitive position.
		2	Improves operating efficiencies in strategic area.
		3	Provides some degree of outside access.
		4	Provides moderate degree of outside access.
5	Provides high level of outside access.		
5	Strategic Match	0	No impacted business goals.
		1	No impacted goal. Increases operational efficiency.
		2	No direct impact of goal, but prerequisite.
		3	Direct impact on a portion of a goal.
		4	Direct achievement of a goal.
5	Direct achievement of multiple goals.		
2	Competitive Response	0	Can be postponed for 12 months with no effect on competitive positioning.
		1	Can be postponed for 12 months with minimal effect to competitive positioning.
		2	Can be postponed for 12 months with significant effect to competitive positioning.
		3	Postponement will result in loss of competitive positioning.
		5	Postponement will result in complete loss of competitive positioning.
2	Productivity	0	Decreased productivity.
		1	Less than 10% increase.
		2	11 - 30% increase.
		3	30 - 50% increase.
		5	51% or more increase.

Determined by a PFM Score - <Criterion Name> validation

Defined separately in editable version of key (only accessible to proper users)

Figure 6-1. Qualitative scoring key

Fields provided with the Mercury Portfolio Management entities can capture the answers to these questions, which are typically gathered at specific points in the proposal, project, or asset lifecycle. Each answer is associated with a weighted value, which is used to automatically calculate a total score for the given proposal, project, or asset.

Scoring Key Validations

There are two validations that make up the scoring key:

- PFM Score - <Criterion Name>
- PFM - Domains

The scoring key validations work together as described below:

- **PFM Score** - <Criterion Name>
One of these validations exists for each criterion in the scoring key. The validation only needs to be created; maintenance of actual values, selections, and weights is performed in the scoring key itself.



The PFM Score - <Criterion Name> validation can be a drop-down list or single-select auto-complete, but it must be validated by SQL.

Mercury Portfolio Management entity fields that are part of the scoring key use the PFM Score - <Criterion Name> validations.

For more details on the relationship between request type fields and validations, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

- **PFM - Domains**
A purely informational validation, used in reporting and visualizations, that lists the names of all scoring key domains.

For example, ACME's PFM - Domains validation contains the names of domains such as:

- Business
- Technical

Scoring key validations, including sample values, are provided with Mercury Portfolio Management. Each validation can be altered to suit an individual business's needs. [Figure 6-2](#) shows a criterion's values being accessed from the editable version of the scoring key.

Weight:

Domain:

Modify Selection Information		
	Value	Selection
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="Utilizes standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="Minor change to standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="Medium change to standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="text" value="Major change to standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	<input type="text" value="No leverage of standard architecture."/>

Add New Selection:

Value	Selection	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Done Cancel

Figure 6-2. Scoring key criterion ready for modification



Note

Depending on the level of alteration involved, the request type rule that governs the calculation of the total score may need to be altered. See [Scoring Key Formulae \(Rules\)](#) for more details.

Scoring Key Formulae (Rules)

The weights and values associated with scoring key criteria are used to calculate the total qualitative score for a Mercury Portfolio Management entity (project, proposal, or asset). Scoring key criteria fall into either of two categories:

- **Value**
Criteria used to measure a Mercury Portfolio Management entity's potential value.

Value Rating is a read-only field provided with all Mercury Portfolio Management entities; its value is calculated automatically according to the following formula:

$$\text{Value Rating} = \text{Sum (Weight * Value) for each Value criterion}$$

- Risk
Criteria used to measure a Mercury Portfolio Management entity's potential risk.

Risk Rating is a read-only field provided with all Mercury Portfolio Management entities; its value is calculated automatically according to the following formula:

$$\text{Risk Rating} = (\text{Sum (Weight * Value) for each Risk criterion}) * (-1)$$



The Portfolio Map visualization can be filtered by Risk Rating or Value Rating. See the *Mercury Portfolio Management User's Guide* for more detailed information.

The total qualitative score for a Mercury Portfolio Management entity is calculated as:

$$\text{Total Score} = \text{Total Value} + \text{Total Risk} + \text{Score Adjustment}$$

Score Adjustment is a field provided with each Mercury Portfolio Management entity for manual adjustments of the qualitative score, which is calculated automatically.

For example, A project sponsor might input **40** into the Score Adjustment field, raising the total score by 40 points.

Someone who thinks the project is riskier than the calculations indicate might input **-30**, lowering the score by 30 points.

The formulae that calculate the Value Rating, Risk Rating, and Total Score are provided with the Mercury Portfolio Management entities in the form of request type rules.

- When making changes to the existing criteria provided with Mercury Portfolio Management, no changes to the rules are necessary.
- If a new criterion is created, the SQL for the appropriate rules must be modified to include the token for the new criterion's field.

Adjusting the Scoring Key

The scoring key can be adjusted directly in the Configure Scoring Criteria page. Adding a new criterion involves creating a new validation and modifying its values using the Configure Scoring Criteria page.

The formulae that calculate the Value Rating, Risk Rating, and Total Score are provided with the Mercury Portfolio Management entities in the form of request type rules.

- When making changes to the existing criteria provided with Mercury Portfolio Management, no changes to the rules are necessary.
- If a criterion name is changed *and* the associated field's token is changed, the SQL for the appropriate rules must be modified to include the new token for the changed criterion's field.
- If a new criterion is created, the SQL for the appropriate rules must be modified to include the token for the new criterion's field.

Changing Criterion Properties

The following properties of criteria in the scoring key can be altered by changing them in the Configure Scoring Criteria page:

- Weight
- Domain
- Value
- Selection
- New values and selections can also be added

To change the properties of a criterion in the scoring key:

1. Log on to Mercury Portfolio Management.
2. Select **Portfolio Management > Administration > Configure Scoring Criteria** from the navigation bar.

The Configure Scoring Criteria page opens.

Configure Scoring Criteria

Save Cancel

Scoring Keys

Risk Domain

Weight	Criterion	Value	Selection
3	Technical Risk Edit	0	No uncertainty.
		1	Very low uncertainty.
		2	Low uncertainty.
		3	Medium uncertainty.
		4	High uncertainty.
		5	Unknown.
2	Architecture Risk Edit	0	Utilizes standard architecture.
		1	Minor change to standard architecture.
		2	Medium change to standard architecture.
		3	Major change to standard architecture.
		5	No leverage of standard architecture.
2	Definition Risk Edit	0	Requirements are firm. No changes.
		1	Requirements are moderately firm. Low probability of changes.
		2	Requirements are moderately firm. Medium probability of changes.
		3	Requirements are moderately firm. High probability of changes.
		4	Requirements are not firm.
1	Infrastructure Risk Edit	0	Uses existing systems and services.
		1	Small changes to existing infrastructure.
		2	Small changes and additions are expected.
		3	Moderate changes are expected.
		4	Moderate changes to multiple systems are expected.
		5	Substantial changes to infrastructure are expected.
1	Organization Risk Edit	0	No risk.
		1	Low risk.
		2	Medium low risk.
		3	Medium risk.
		4	High risk.
		5	Extreme risk.

Value Domain

Weight	Criterion	Value	Selection
10	Internal Rate of Return Edit	0	Zero or less.
		1	1 - 5.99%.
		2	6 - 9.99%.
		3	10 - 14.99%.
		4	15% and above.
		5	
5	Competitive Advantage Edit	0	No client or market impact.
		1	Improves operating efficiencies that affect competitive position.
		2	Improves operating efficiencies in strategic area.
		3	Provides some degree of outside access.
		4	Provides moderate degree of outside access.
		5	Provides high level of outside access.
5	Strategic Match Edit	0	No impacted business goals.
		1	No impacted goal. Increases operational efficiency.
		2	No direct impact of goal, but prerequisite.
		3	Direct impact on a portion of a goal.
		4	Direct achievement of a goal.
		5	Direct achievement of multiple goals.
2	Competitive Response Edit	0	Can be postponed for 12 months with no effect on competitive positioning.
		1	Can be postponed for 12 months with minimal effect to competitive positioning.
		2	Can be postponed for 12 months with significant effect to competitive positioning.
		3	Postponement will result in loss of competitive positioning.
		5	Postponement will result in complete loss of competitive positioning.
		5	
2	Productivity Edit	0	Decreased productivity.
		1	Less than 10% increase.
		2	11 - 30% increase.
		3	30 - 50% increase.
		5	51% or more increase.
		5	

Save Cancel

3. Locate the criterion whose value you wish to change and click the **Edit** button below its name.

The Edit Criterion page opens.

MERCURY Close Window X

Edit Criterion: Architecture Risk

*Weight:

*Domain: Risk Domain

Modify Selection Information		
	Value	Selection
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	Utilizes standard architecture.
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Minor change to standard architecture.
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Medium change to standard architecture.
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	Major change to standard architecture.
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	No leverage of standard architecture.

Add New Selection:

Value	Selection	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Close Window X

4. Make the desired changes to the criterion and click **Done**.
5. Click **Save** to save the changes made to the scoring key.

Changing a Criterion Name

Changing the name of a criterion involves changing the validation name and altering some SQL. Depending on whether you decide to change the associated field's token, the request type rules must also be altered.

1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Configuration > Validations**.
3. Open the desired PFM Score - *<Criterion Name>* validation.
4. Change the value in the Name field.
5. In the SQL area, change the value in single quotes in the WHERE clause to match the new value in the Name field.

6. Open the field associated with the changed criterion in the desired Mercury Portfolio Management entity, and specify the changed PFM Score - *<Criterion Name>* validation as the field's validation.

The Mercury Portfolio Management entities are configured using the **Request Types** Workbench. For more detailed information on configuring request type fields, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

7. (Optional) If you want, you can change the field's token to match the new criterion name.

This is an optional step; the field will function as before without touching the token at all.

If you change the field's token, you must modify the appropriate request type rule to take into account the new criterion. The SQL for the rule should be modified to include the new token for the criterion's field.

Adding a New Criterion

Adding a new criterion to the scoring key involves creating a new PFM Score - *<Criterion Name>* validation, defining the criterion's values from the Configure Scoring Criteria page, and adjusting request type rules.



Note

Making adjustments to the scoring key requires knowledge of SQL, which is used in the request type rules that govern the calculation of the Total Value, Total Risk, and Total Score fields.

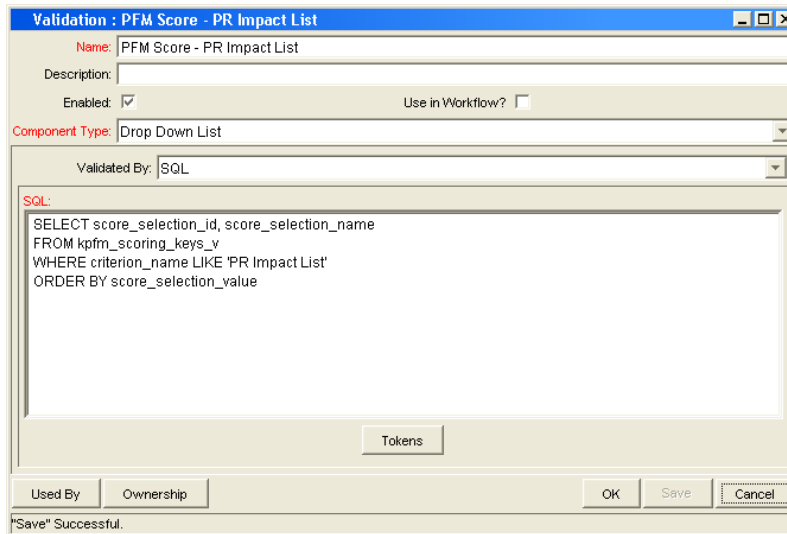
To add a criterion to the scoring key:

1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Configuration > Validations**.
3. Create a new PFM Score - *<Criterion Name>* validation, which will hold the values for the new criterion.



Note

The PFM Score - *<Criterion Name>* validation can be a drop-down list or single-select auto-complete, but it must be validated by SQL.



Validation : PFM Score - PR Impact List

Name: PFM Score - PR Impact List

Description:

Enabled: Use in Workflow?

Component Type: Drop Down List

Validated By: SQL

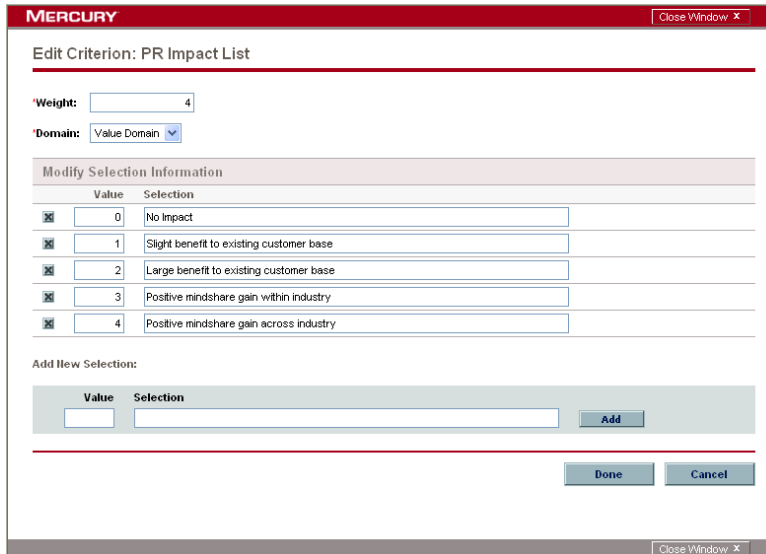
SQL:

```
SELECT score_selection_id, score_selection_name
FROM kpfm_scoring_keys_v
WHERE criterion_name LIKE 'PR Impact List'
ORDER BY score_selection_value
```

Buttons: Used By, Ownership, Tokens, OK, Save, Cancel

Save Successful.

4. Copy the SQL from a pre-existing PFM Score - *<Criterion Name>* validation into the SQL area.
5. In the WHERE clause, put the *<Criterion Name>* into the single quotes.
6. Once the validation is created, use the Configure Scoring Criteria page to configure the criterion's properties as described in [Changing Criterion Properties](#) on page 57.



MERCURY Close Window

Edit Criterion: PR Impact List

Weight:

Domain: Value Domain

Modify Selection Information

Value	Selection
<input checked="" type="checkbox"/> 0	No Impact
<input checked="" type="checkbox"/> 1	Slight benefit to existing customer base
<input checked="" type="checkbox"/> 2	Large benefit to existing customer base
<input checked="" type="checkbox"/> 3	Positive mindshare gain within industry
<input checked="" type="checkbox"/> 4	Positive mindshare gain across industry

Add New Selection:

Value: Selection: Add

Done Cancel

Close Window

7. Create a new field in the desired Mercury Portfolio Management entity, specifying the new PFM Score - *<Criterion Name>* validation as the field's validation.

The Mercury Portfolio Management entities are configured using the **Request Types Workbench**. For more detailed information on configuring request type fields, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

8. From the Request Types Workbench window, open the Mercury Portfolio Management entity that will be using the new criterion, and adjust the proper request type rule to take into account the new criterion.

The SQL for the rule should be modified to include the token for the new criterion's field.



Rules must be modified individually for each Mercury Portfolio Management entity making use of the new criterion.

Examples

The ACME Corporation has decided to make some changes to the scoring key being used in their installation of Mercury Portfolio Management. Harold Lomax, ACME's Mercury IT Governance Center administrator, will be the one to implement these changes.

Changing a Criterion

A change has been requested for the criterion Architecture Risk. It should contain another selection with value 6, for negative impact to standard architecture.

Lomax changes the name of the Architecture Risk criterion as follows:

1. In Mercury Portfolio Management, Lomax opens the Configure Scoring Criteria page by selecting **Portfolio Management > Administration > Configure Scoring Criteria** from the navigation bar.

Configure Scoring Criteria

Scoring Keys			
Risk Domain			
Weight	Criterion	Value	Selection
3	Technical Risk <input type="button" value="Edit"/>	0	No uncertainty.
		1	Very low uncertainty.
		2	Low uncertainty.
		3	Medium uncertainty.
		4	High uncertainty.
		5	Unknown.
2	Architecture Risk <input type="button" value="Edit"/>	0	Utilizes standard architecture.
		1	Minor change to standard architecture.
		2	Medium change to standard architecture.
		3	Major change to standard architecture.
		5	No leverage of standard architecture.
2	Definition Risk <input type="button" value="Edit"/>	0	Requirements are firm. No changes.
		1	Requirements are moderately firm. Low probability of changes.
		2	Requirements are moderately firm. Medium probability of changes.
		3	Requirements are moderately firm. High probability of changes.
		4	Requirements are not firm.
1	Infrastructure Risk <input type="button" value="Edit"/>	0	Uses existing systems and services.
		1	Small changes to existing infrastructure.
		2	Small changes and additions are expected.
		3	Moderate changes are expected.
		5	Moderate changes to multiple systems are expected.
1	Organization Risk <input type="button" value="Edit"/>	0	No risk.
		1	Low risk.
		2	Medium low risk.
		3	Medium risk.
		5	Extreme risk.
Value Domain			
Weight	Criterion	Value	Selection
10	Internal Rate of Return <input type="button" value="Edit"/>	0	Zero or less.
		1	1 - 5.99%.
		2	6 - 9.99%.
		3	10 - 14.99%.
		4	15% and above.
5	Competitive Advantage <input type="button" value="Edit"/>	0	No client or market impact.
		1	Improves operating efficiencies that affect competitive position.
		2	Improves operating efficiencies in strategic area.
		3	Provides some degree of outside access.
		5	Provides high level of outside access.
5	Strategic Match <input type="button" value="Edit"/>	0	No impacted business goals.
		1	No impacted goal. Increases operational efficiency.
		2	No direct impact of goal, but prerequisite.
		3	Direct impact on a portion of a goal.
		5	Direct achievement of multiple goals.
2	Competitive Response <input type="button" value="Edit"/>	0	Can be postponed for 12 months with no effect on competitive positioning.
		1	Can be postponed for 12 months with minimal effect to competitive positioning.
		2	Can be postponed for 12 months with significant effect to competitive positioning.
		3	Postponement will result in loss of competitive positioning.
		5	Postponement will result in complete loss of competitive positioning.
2	Productivity <input type="button" value="Edit"/>	0	Decreased productivity.
		1	Less than 10% increase.
		2	11 - 30% increase.
		3	30 - 50% increase.
		5	51% or more increase.

2. Lomax clicks the **Edit** button below the Architecture Risk criterion.

The Edit Criterion page opens.

3. Lomax changes the entry for Architecture Risk by adding another selection.

MERCURY Close Window X

Edit Criterion: Architecture Risk

*Weight:

*Domain: Risk Domain

Modify Selection Information	
Value	Selection
<input checked="" type="checkbox"/> <input type="text" value="0"/>	Utilizes standard architecture.
<input checked="" type="checkbox"/> <input type="text" value="1"/>	Minor change to standard architecture.
<input checked="" type="checkbox"/> <input type="text" value="2"/>	Medium change to standard architecture.
<input checked="" type="checkbox"/> <input type="text" value="3"/>	Major change to standard architecture.
<input checked="" type="checkbox"/> <input type="text" value="5"/>	No leverage of standard architecture.
<input checked="" type="checkbox"/> <input type="text" value="6"/>	Negative impact to standard architecture

Add New Selection:

Value	Selection	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Close Window X

4. Lomax clicks **Add** and then **Done**.

Adding a New Criterion

A new criterion has been requested for the Value domain, to be called PR Impact. It should contain the following values:

- 0 - No impact
- 1 - Slight benefit to existing customer base
- 2 - Large benefit to existing customer base
- 3 - Positive mindshare gain within industry
- 4 - Positive mindshare gain across industry

PR Impact should have a weight of 4, being more important than other criteria in the scoring key such as Competitive Advantage, but less important than Internal Rate of Return.

Lomax creates the new PR Impact criterion as follows:

1. In the Workbench interface, Lomax creates a drop-down list validation validated by SQL called PFM Score - PR Impact List.
2. Lomax copies the SQL from the pre-existing scoring key validation PFM Score - Infrastructure Risk into the PFM Score - PR Impact List validation.

- Lomax substitutes **PR Impact List** for **Infrastructure Risk** inside the single quotes in the WHERE clause.

The image shows two screenshots of a validation configuration window. The top window is titled "Validation : PFM Score - Infrastructure Risk" and shows a SQL query with "Infrastructure Risk" in the WHERE clause. The bottom window is titled "Validation : PFM Score - PR Impact List" and shows the same SQL query but with "PR Impact List" in the WHERE clause, which is circled in red.

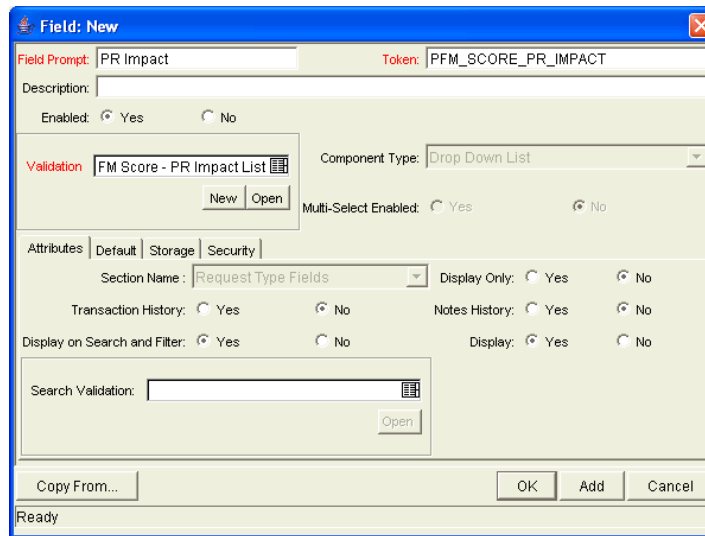
```
Validation : PFM Score - Infrastructure Risk
Name: PFM Score - Infrastructure Risk
Description:
Enabled:  Use in Workflow? 
Component Type: Drop Down List
Validated By: SQL
SQL:
SELECT score_selection_id, score_selection_name
FROM kpfm_scoring_keys_v
WHERE criterion_name LIKE 'Infrastructure Risk'
ORDER BY score_selection_value

Validation : PFM Score - PR Impact List
Name: PFM Score - PR Impact List
Description:
Enabled:  Use in Workflow? 
Component Type: Drop Down List
Validated By: SQL
SQL:
SELECT score_selection_id, score_selection_name
FROM kpfm_scoring_keys_v
WHERE criterion_name LIKE 'PR Impact List'
ORDER BY score_selection_value
```

- Lomax opens the request type associated with each Mercury Portfolio Management entity and adds a field to each one called PR Impact.

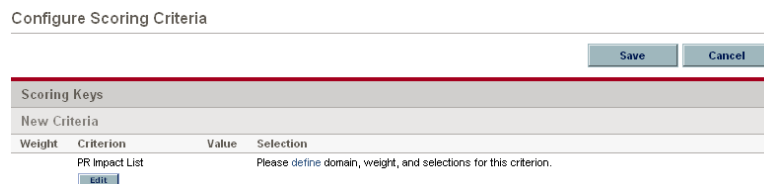
For the Validation, he selects **PFM Score - PR Impact List**.

For the Token, he enters **PFM_SCORE_PR_IMPACT**.



- In Mercury Portfolio Management, Lomax opens the Configure Scoring Criteria page by selecting **Portfolio Management > Administration > Configure Scoring Criteria** from the navigation bar.

The new PR Impact List criterion appears at the top of the page.



- Lomax clicks the **Edit** button below the PR Impact List criterion.

The Edit Criterion page opens.

- Lomax adds the values and weight for PR Impact List.

MERCURY Close Window X

Edit Criterion: PR Impact List

Weight:

Domain: Value Domain

Modify Selection Information

	Value	Selection
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="No Impact"/>
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="Slight benefit to existing customer base"/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="Large benefit to existing customer base"/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="text" value="Positive mindshare gain within industry"/>
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	<input type="text" value="Positive mindshare gain across industry"/>

Add New Selection:

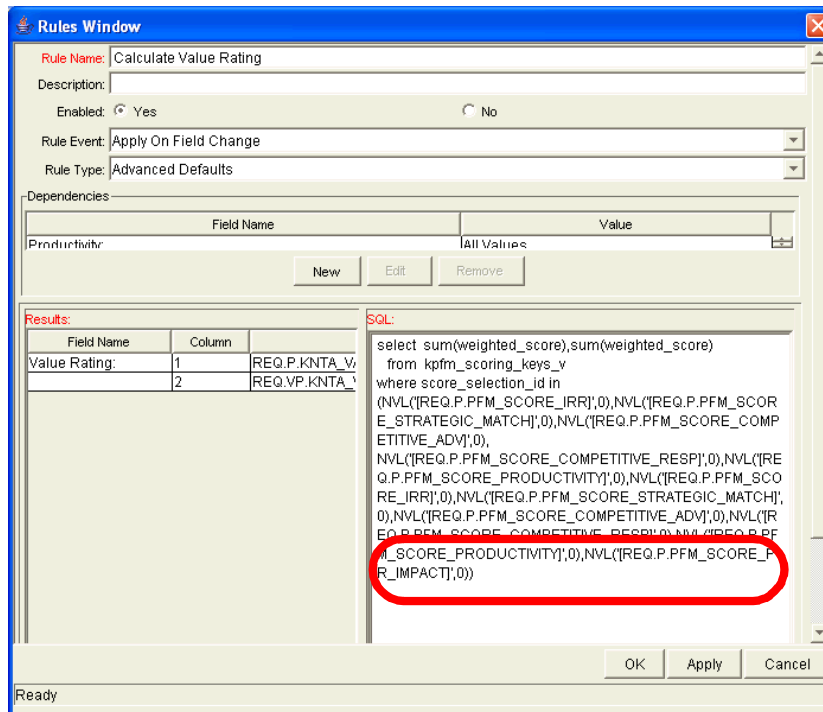
Value	Selection	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Close Window X

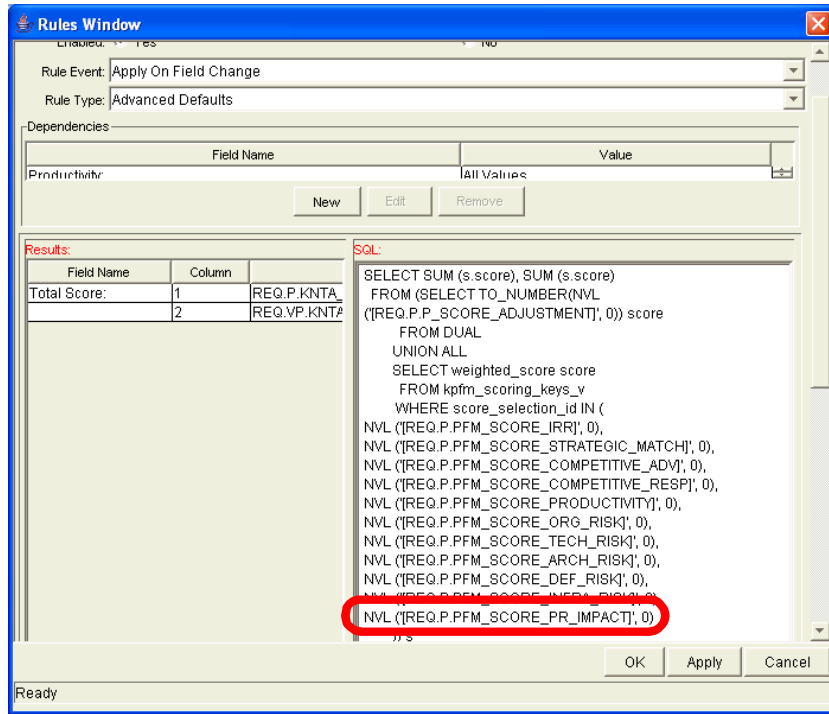
8. Lomax clicks **Done**.

9. In the Workbench interface, Lomax opens the request type associated with each Mercury Portfolio Management entity.

- a. Lomax adjusts the SQL for the request type rule responsible for calculating Total Value, adding the token PFM_SCORE_PR_IMPACT where appropriate.



- b. Lomax adjusts the SQL for the request type rule responsible for calculating Total Score, adding the token PFM_SCORE_PR_IMPACT where appropriate.



Chapter

7

Enabling Users in Mercury Portfolio Management

In This Chapter:

- *Overview of Enabling Users in Mercury Portfolio Management*
 - *Understanding Security Groups*
 - *Associating Security Groups with Process Steps*
 - *Associating Security Groups with Mercury Portfolio Management Entities*
-

Overview of Enabling Users in Mercury Portfolio Management

This chapter describes how to enable Mercury IT Governance Center users to use Mercury Portfolio Management entities and processes.



Note

Licenses, user accounts and security groups are assigned by the Mercury IT Governance Center administrator. Contact your application administrator for matters relating to Mercury Portfolio Management licenses.

Understanding Security Groups

Security groups are constructed to provide a set of users with specific access to screens and functions within Mercury Portfolio Management. Each security group is configured with a set of access grants that enable specific access. Users are then associated with one or more security groups.

A user's security group memberships determine which entities user can view or edit, which processes a user can use, and which process steps a user has authority to act on. Each Mercury Portfolio Management user can be a member of multiple security groups. The collection of security groups to which a user belongs defines that user's role and access within Mercury Portfolio Management.

Associating Security Groups with Process Steps

Mercury Portfolio Management provides empty security groups that are pre-configured to work with the delivered Mercury Portfolio Management processes described in [Configuring Mercury Portfolio Management Processes on page 33](#). For example, the Review Application Data step in the asset process can be acted on by the Team Manager security group.

These security groups must be populated with the proper users before the processes can be used. For more information on adding users to security groups, see the *Security Model Guide and Reference*.

The mapping of security groups to process steps can easily be altered to best suit your business needs through the **Workflows** screen group in the Mercury IT Governance Workbench interface. For more information on configuring process steps, including setting security, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

Associating Security Groups with Mercury Portfolio Management Entities

The Mercury Portfolio Management entities (proposals, projects, assets) can be restricted to particular security groups. By default, the Mercury Portfolio Management entities are unrestricted.

You can restrict creation of the Mercury Portfolio Management entities to certain security groups through the **Request Types** screen group in the Workbench interface. For more information on setting request type security, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

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