



Mercury IT Governance Center™
Mercury Program 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*
 - *Prerequisite Documents*
 - *Related Documents*
 - *Overview of Program Management*
 - *Overview of Configuring Program Management*
-

About This Document

Mercury Program Management™ is a Mercury IT Governance Center™ product that provides organizations with a single location from which Program Managers can initiate, operate, and manage their portfolio of programs and projects. Organizations implement Mercury Program Management in order to:

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

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

This guide provides instructions for configuring Mercury Program Management to enable the successful management of programs for your company. This can include creating and modifying request types and workflows as well as enabling user access to Program Management templates and menus.

This document contains the following chapters:

- [Chapter 1, *Introduction*, on page 9](#)

This chapter introduces Mercury Program Management, provides a list of the chapters and contents, and offers an overview of Program Management.

- [Chapter 2, *Configuring Program Management Request Types and Workflows*, on page 19](#)

Once the Mercury Program Management requirements are gathered, you can configure the program-related request types and workflows. This chapter provides instructions for creating request types and workflows for use with Mercury Program Management.

Who Should Read This Document

This document is intended for the following audience types:

- Application administrators
- Application developers/configurators

For More Information

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

Prerequisite Documents

Prerequisite documents for this document are:

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

For More Information

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

Related Documents

Related documents for this guide are:

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

For More Information

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

Overview of Program Management

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

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

- Oversee related IT projects
- Coordinate inter-project deliverables and milestones
- Manage scope change
- Identify and mitigate risks
- Resolve inter-project issues
- Manage the allocation of resources

In Mercury IT Governance Center, before a program can be created, a request must be submitted requesting the creation of a program (see *Figure 1-1*). Once a program is created, concerns can surface that need to be dealt with. Mercury IT Governance Center provides a framework for such concerns to be identified and resolved in the form of requests. Requests can be submitted, tracked, rejected, completed, and reported on.

Program Management includes the following request types that can impact programs (see *Figure 1-1*):

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

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

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

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

- **Scope Change.** Scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. Submitted scope change requests can be assessed before being rejected or incorporated into program or project scope. Program and project scope can be controlled by ensuring that possible changes are clearly identified, aligned, and processed.
- **Resource Request.** Resource requests allow a Program Manager to more easily and quickly request and approve resources, as well as maintain visibility over resource needs and allocations.

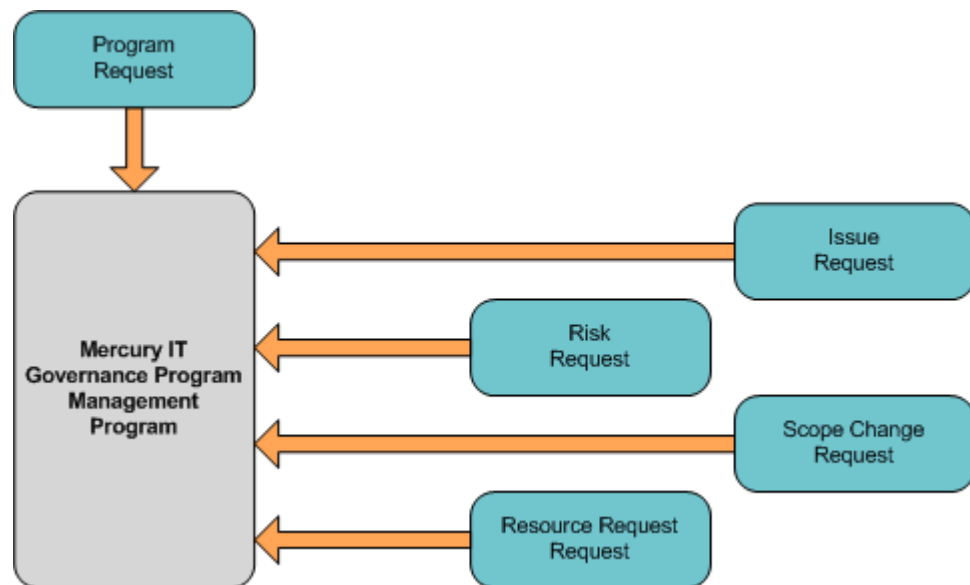


Figure 1-1. Program Management process

Overview of Configuring Program Management

Step One: Gather Information

The first step in configuring Mercury Program Management is to gather your program requirements. In order to properly configure and enable Program Management, you must determine the program-related request types to be used.

Each program-related request requires different information to process it. For each field in the program-related request, collect the following information:

- **Field name.** The field's prompt should help ensure that the correct information is captured.
- **Information type.** What type of information needs to be collected? Should it be a text field? Will users pick from a predetermined list of values? The field information type is governed by its validation, which defines the field's component type as well as what information can be entered into the field. For example, a field using a numeric text field validation will accept only numeric values.
- **Field behavior.** There are many aspects of a field that can be controlled:
 - The field can be configured to become non-editable or required depending on the value of other fields, or at a certain workflow step.
 - The field can also be configured to automatically populate itself based on values in other fields.
 - The field can also be configured to be non-editable or invisible based on which user is looking at the request.

Table 1-1 lists the Mercury-supplied request types and workflows for all of the Program Management entities.

Table 1-1. Program Management request types and workflows

Request Type	Workflow	Definition
PMO - Program Request	PMO - Program Request Workflow	Initiative request used to request a new program.
PMO - Issue	PMO - Issue Management Workflow	A request type for entering issues.
PMO - Risk	PMO - Risk Management Workflow	A request type for entering risk information.
PMO - Scope Change	PMO - Scope Change Request Workflow	A request type for entering scope changes.
PMO - Resource Request	PMO - Resource Request Workflow	Standard method for submitting resource requests for new resources and changes to existing resources.

If these pre-configured request types and workflows are satisfactory, no further requirements gathering is necessary.

Step Two: Configure Program Management Request Types

Use existing request types and workflows for Program Management. This includes configuring their associated request header types to include the desired Program Management field group. See [Configuring Program Management Request Types and Workflows on page 19](#) for details.

Step Three: Configure Program Management Workflows

Use existing request types and workflows for Program Management. This includes configuring their associated request header types to include the desired Program Management field group. See [Configuring Program Management Workflows on page 25](#) for details.

Step Four: Enable Users to Use Program Management

Businesses often need to control access to certain information and business processes. This can be done to protect sensitive information, such as employee salaries, or to simplify business processes by hiding data that is irrelevant to the user. Mercury IT Governance Center includes a set of features to help control data and process security on the following levels:

- Limiting who can access certain windows or pages
- Limiting who can view or edit certain fields
- Limiting the data displayed in sensitive fields or screens
- Limiting which users can view, create, edit, or process Mercury IT Governance Center entities, such as requests, packages, projects, portfolios, and programs
- Limiting which users can view, create, or edit Mercury IT Governance Center configuration entities, such as workflows, request types, object types, and security groups
- Limiting which users can alter the security settings

The following features control the data and process security in Mercury IT Governance Center. These features can be combined in a number of ways to provide a secure system:

- **Licenses.** Each user is assigned a license that provides the user with the potential to access to a set of Mercury IT Governance Center product-related screens and functions. Licenses dictate available behavior but need to be used in conjunction with access grants to enable specific fields and functions.
- **Access Grants.** Linked to users through security groups, access grants define which windows and functions users can view, edit, or perform actions in. Access grants also provide varying levels of control over certain entities and fields.
- **Entity-level restrictions.** Settings on the entity that specify who can create, edit, process, and delete Mercury IT Governance Center entities, such as requests, packages, and projects. You can also control which request types and object types can be used with certain workflows. These restrictions are often configured in the configuration entities, such as workflows, request types, and object types.

- **Field-level restrictions.** For each custom field that you define in Mercury IT Governance Center, you can configure when it is visible or editable. For some fields, you can additionally specify which users can view or edit the field.
- **Configuration-level restrictions.** You can specify, using ownership groups settings, which users can modify configuration entities in the system. For example, you can control who is allowed to edit an existing workflow. This allows you to guarantee that only appropriate users are altering your Mercury IT Governance Center-controlled processes.

For More Information

For more information concerning accessing the Mercury IT Governance Center as well as security groups and access grants, see the *Security Model Guide and Reference*.

Chapter

2

Configuring Program Management Request Types and Workflows

In This Chapter:

- *Overview of Program Management Request Types*
 - *Creating Program Management Request Types*
 - *Configuring Program Management Workflows*
-

Overview of Program Management Request Types

Once the Mercury Program Management requirements are gathered, you can configure the program-related request types and workflows. To be used in Program Management, request types must include one of the Program Management field groups.

Field groups are a set of fields that are delivered with the Mercury IT Governance Center products to enable a quick solution implementation or to enable certain functions in the Mercury IT Governance Center. For example, Program Management delivers a PMO Program Issue field group to enable consistent tracking of information for program issues. This field group is associated with a request type (through the request header type) to enable the basic Mercury Demand Management™ features such as scheduling and analyzing requests (see *Figure 2-1*).

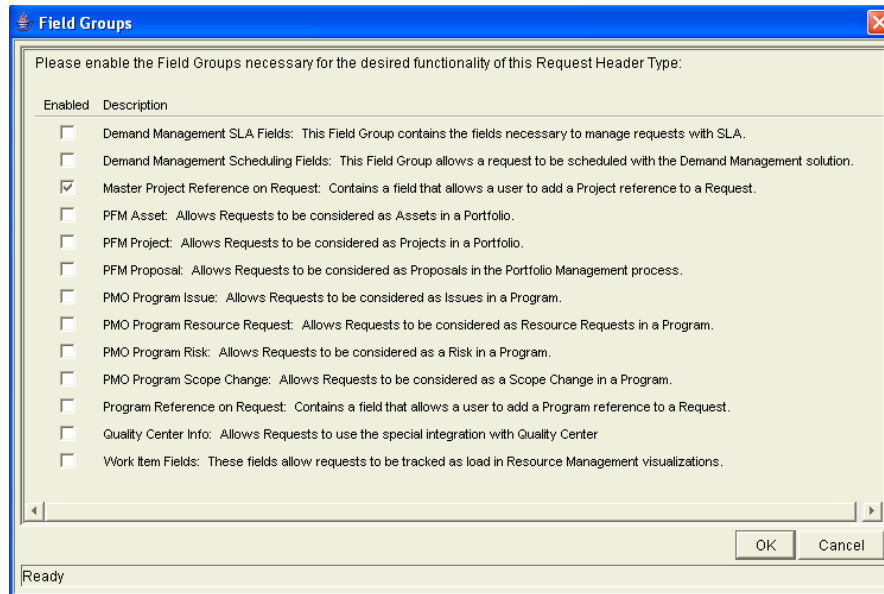


Figure 2-1. Field Groups window

For Program Management, each Program Management (except the PMO - Program Request) request type's request header type must be linked to the desired field group (see *Figure 2-1*).

Table 2-1. Program Management request types and field groups

Request Type	Field Group
PMO - Issue	PMO Program Issue
PMO - Risk	PMO Program Risk
PMO - Scope Change	PMO Program Scope Change
PMO - Resource Request	PMO Program Resource Request

Creating Program Management Request Types

Mercury Program Management request types are specific request types that your organization has decided to include in Program Management. These request types must be configured to work with Program Management.

To create a Program Management request type:

1. Open the Mercury IT Governance Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Demand Mgmt > Request Type**.

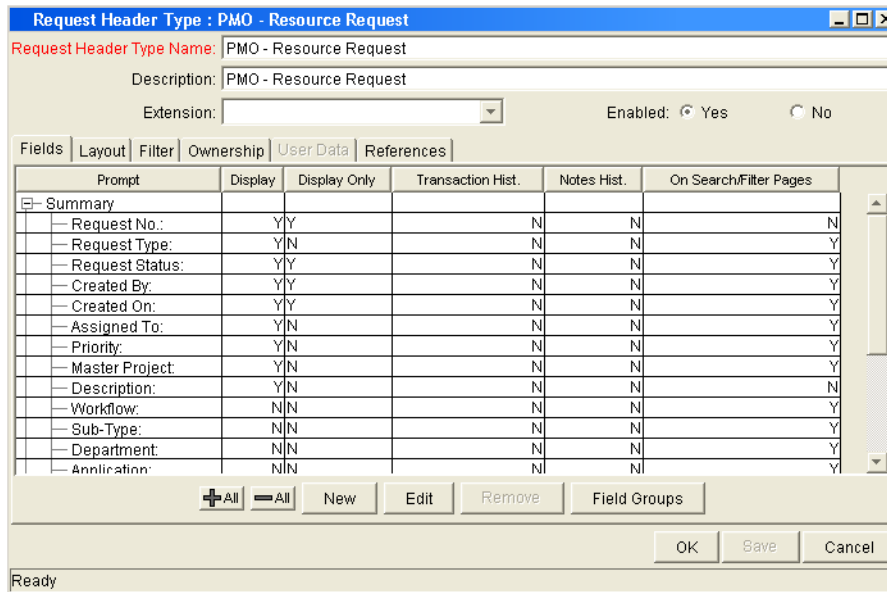
3. Open the request type.

For information on how to select, open, or create a request type, see the *Demand Management: Configuring a Request Resolution System* document. The Request Type window opens.

4. Add the field group to the request header type.

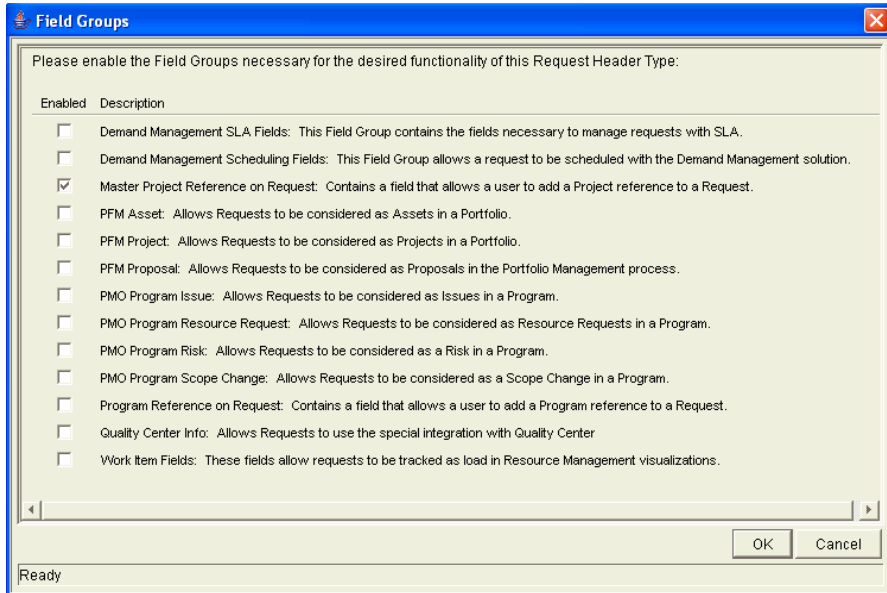
- a. Under the Request Header Type field, click **Open**.

The specified Request Header Type window opens.



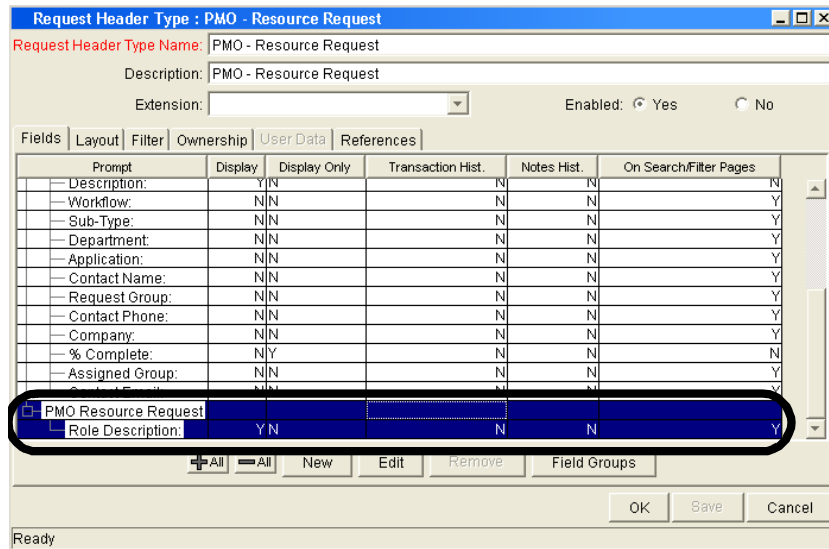
b. In the Request Header Type window, click **Field Groups**.

The Field Groups window opens.



c. Select the Program Management field group to attach to your request header type and click **OK**.

The selected field group appears on the request header type.



- d. In the Request Header Type window, click **OK** to save the request header type and close the window. The Request Type window returns.
5. In the Request Type window, click **Save** to save the request type.
6. Add the associated workflow to the request type.
 - a. In the Request Type window, click the **Workflows** tab.

The **Workflows** tab opens.

Request Type : PMO - Resource Request

Request Type Name: PMO - Resource Request
Creation Action Name: PMO - Resource Request
Request Header Type: PMO - Resource Request

Category: [Dropdown]
Extension: [Dropdown]
Description: Standard method for submitting resource requests for new resources and changes to existing resources.

Meta Layer View: MREQ_ PMO_RESOURCE_REQ_01
Max Fields: 50
Enabled: Yes No

Fields | Layout | Display Columns | Request Status | Status Dependencies | Rules
Commands | Sub-Types | Workflows | User Access | Notifications | User Data | Ownership | Help Content

Select which Workflows can be used with this Request Type. Allow all Workflows or limit by adding the Workflows to the table below.

All Workflows are allowed for this Request Type

Workflow Name	Description	Workflow Enabled
PMO - Resource Request Workflow	Automated process for Resource Requests	Y

New Remove

OK Save Cancel

Ready

b. In the **Workflows** tab, click **New**.

The Workflow: New window opens.

Workflow: New

Workflow: [Dropdown]

OK Add Cancel

Ready

c. In the Workflow field, select a workflow and click **OK**.

The workflow is added to the request type. The Workflow New window closes.

d. In the Request Type window, click **Save** to save the request type.

7. Add the request type to its associated workflow.

For information on how to add a request type to a workflow, see the next section ([Configuring Program Management Workflows](#)).

8. In the Request Type window, click **OK** to save and close the request type.

Configuring Program Management Workflows

A Program Management workflow must be associated with a Program Management request type in order to use it. This association is done through the Workflow window's **Request Types** tab.

To associate a workflow with a request type:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

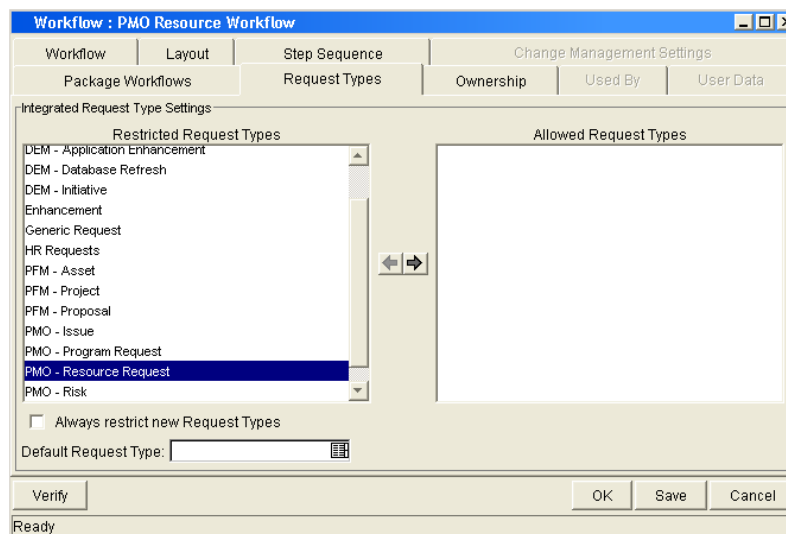
2. From the shortcut bar, select **Configuration > Workflow**.

3. Open the Workflow.

For information on how to select, open, or create a workflow, see the *Demand Management: Configuring a Request Resolution System* document. The Workflow window opens.

4. In the Workflow window, select the **Request Types** tab.

The **Request Types** tab opens.



5. In the **Request Types** tab, select the desired request type from the Restricted Request Types list and move it into the Allowed Request Types list by clicking the enabled right arrow.
6. In the **Request Types** tab, click **OK** to save and close the workflow.

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