



Mercury IT Governance Center™

What's New in Release 6.0

Version: 6.0

MERCURY™



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Table of Contents

List of Figures	vii
List of Tables	ix
Chapter 1: Introduction.....	11
About This Document.....	12
Who Should Read This Document	12
Related Documents.....	13
Overview of Release 6.0 Features	13
Chapter 2: Release 6.0 Features.....	15
What-If Portfolio Management Scenarios	16
New and Improved Resource Search.....	18
Document Management Capabilities.....	20
Enhanced Connectivity, Synchronization, and Integration	23
Enhancements to the Dashboard.....	23
Increased Integration Between Project and Resource Management	25
Conversion of Project Management Functions to HTML.....	26
Enhanced Features for International Business	27
Support for Unlimited International Calendars.....	27
Multicurrency Support.....	29
Enhanced Product Usability.....	31
Interface Improvements	31
Expanded and Enhanced Product Documentation.....	33
Simplified License Model.....	35
Reports Conversions.....	37

Self-Service Updates to Resource Calendars	39
Changes to Logging	39
Additional Product Enhancements.....	40
SOP 98-1 Monitoring and Enforcement.....	40
Enhanced Portfolio Security.....	41
Time Management Enhancements	41
Request Search Enhancements.....	42
Enhancements to the Change Management Extensions.....	42
Feature Summary from Release 5.5	43
Product Name Changes in Release 5.5.....	43
Licensing Changes in Release 5.5	44
Technology Changes in Release 5.5.....	44
Chapter 3: Release 6.0 Installation and Upgrade Impacts.....	45
New Location for Installation and Upgrade Information.....	46
Licensing Impacts	47
(Upgrade Only) Dashboard Impacts.....	49
Controlling the Width of Portlets	49
Changing Portlet Titles	49
Controlling Results in Maximized Portlets	49
Restoring Preference Fields to Their Defaults.....	49
Adding and Removing Columns.....	50
Controlling the Number of Portlet Columns	50
Security Impacts	50
Access Grants Assigned to Security Groups.....	50
Resource and Organization Model Impacts	51
Upgrade Impacts	51
Installation Impacts	51
Calendar and Currency Impacts.....	52
Upgrade Impacts.....	52
Installation Impacts	52
(Upgrade Only) Financial, Project, and Time Management Impacts	53
Time Tracking and Ties Between Actuals	53
Skill Rates.....	53
What-If Analysis	54
Time Sheet Policies.....	54
(Microsoft Project Users Upgrading from Release 5.0) Updating Project Data.....	54
(Upgrade Only) Reports Impacts	55
Report Categorization and Required License	55
New Submit Report Access Grant.....	56
New Report Category Validation	56
Changes to Report Type: Synchronize Meta Layer Window	56
(Upgrade Only) Document Management Impacts.....	57

Changes to Reports	57
Other Impacts.....	58
(Upgrade from Release 5.0 Only) Kintana Service Registry Entry	58
Index	59

List of Figures

Figure 2-1	Scenario Comparison page	17
Figure 2-2	Search Resources page.....	19
Figure 2-3	Searching a request (without document management).....	21
Figure 2-4	Searching a request (with document management).....	21
Figure 2-5	Release 6.0 Dashboard	24
Figure 2-6	Task Details window in the standard (HTML) interface	26
Figure 2-7	Regional calendars	27
Figure 2-8	Regional calendar for Spain	28
Figure 2-9	Multicurrency support.....	30
Figure 2-10	Rebranded colors (standard interface menu bar)	31
Figure 2-11	Interface improvements: Personalize Dashboard page	32
Figure 2-12	Mercury IT Governance Center Documentation home page.....	33
Figure 2-13	Reports menu in the standard interface	37
Figure 2-14	Submit New Report page.....	38
Figure 3-1	Changing portlet titles	49

List of Tables

Table 2-1	Product name changes (release 5.0 to 5.5/6.0)	43
Table 3-1	Licensing changes in release 6.0.....	47
Table 3-2	Security groups and the access grants assigned to them.....	50

Chapter 1 Introduction

In This Chapter:

- *About This Document*
 - *Who Should Read This Document*
 - *Related Documents*
 - *Overview of Release 6.0 Features*
-

About This Document

This document provides information about:

- New features in release 6.0 of Mercury IT Governance Center™
- Potential impacts for customers upgrading from release 5.5 to 6.0
- Potential impacts for customers upgrading from release 5.0 to 6.0

Who Should Read This Document

This document is for all users of Mercury IT Governance Center:

- End users
- User administrators
- Application developers or configurators
- System or instance administrators
- Database administrators

For More Information

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

Related Documents

Key related documents include:

- *Configuring the Standard Interface*
- *Guide to Documentation*
- *Getting Started*
- *Key Concepts*
- *Release Notes*
- *System Administration Guide and Reference*
- *System Requirements and Compatibility Matrix*

For More Information

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

Overview of Release 6.0 Features

Features in release 6.0 of Mercury IT Governance Center include:

Major Product Features

- Six-dimensional “what-if” Portfolio Management scenarios
- New and improved resource search
- Document management capabilities

Enhanced Connectivity, Synchronization, and Integration

- Enhancements to the Dashboard
- Increased integration between Project Management and Resource Management
- Conversion of Project Management functions to HTML

Enhanced Features for International Business

- Support for unlimited international calendars
- Multicurrency support

Enhanced Product Usability

- Interface improvements
- Expanded and enhanced product documentation
- Simplified license model
- Reports conversions
- Self-service updates to resource calendars
- Changes to logging

Additional Product Enhancements

- SOP 98-1 monitoring and enforcement
- Enhanced portfolio security
- Time Management enhancements
- Request search enhancements
- Enhancements to the Change Management Extensions

Chapter 2 Release 6.0 Features

In This Chapter:

- *What-If Portfolio Management Scenarios*
- *New and Improved Resource Search*
- *Document Management Capabilities*
- *Enhanced Connectivity, Synchronization, and Integration*
 - *Enhancements to the Dashboard*
 - *Increased Integration Between Project and Resource Management*
 - *Conversion of Project Management Functions to HTML*
- *Enhanced Features for International Business*
 - *Support for Unlimited International Calendars*
 - *Multicurrency Support*
- *Enhanced Product Usability*
 - *Interface Improvements*
 - *Expanded and Enhanced Product Documentation*
 - *Simplified License Model*
 - *Reports Conversions*
 - *Self-Service Updates to Resource Calendars*
 - *Changes to Logging*
- *Additional Product Enhancements*
 - *SOP 98-1 Monitoring and Enforcement*
 - *Enhanced Portfolio Security*
 - *Time Management Enhancements*
 - *Request Search Enhancements*
 - *Enhancements to the Change Management Extensions*
- *Feature Summary from Release 5.5*
 - *Product Name Changes in Release 5.5*

- *Licensing Changes in Release 5.5*
 - *Technology Changes in Release 5.5*
-

What-If Portfolio Management Scenarios

In release 6.0, Mercury Portfolio Management™ supports six-dimensional, date-driven what-if analysis. This new product capability lets you visualize and interactively adjust the start and end dates of projects in what-if scenarios, so you can be assured that you can actually execute an optimized IT portfolio. This features allows you, for example, to evaluate the cost and resource impact of shifting a proposal or project start date.

Figure 2-1 shows some of these new product capabilities.

Scenario Comparison: Phase Two Scenario Comparison

Comparison Information
Save

* **Comparison Name:** Phase Two Scenario Comparison **Created By:** John Smith **Last Updated By:** John Smith

Show Only Active Comparisons: Yes No **Configure Access** **Last Updated On:** November 25, 2003

Description:

Calculate **Total Budget** for comparison from the following Budgets:

Calculate **Total Available Resources** for comparison from the following Resource Pools:

* **Start Period:** January 2004

* **Finish Period:** December 2004

Overview
Budget Summary
Cost Benefit
Budget By Asset Class
Budget By Project Class
Budget By Business Objective

Graph Period Interval: Quarter **Change**

Cost Plan

Resource Plan

Scenario Content
Change Scenario Names

Name	Phase	Business Unit	Total Cost	Total Benefit	Total Resources (person months)	RDI	Score	Pas...	Sta...	Agg...
Capital Streamline Unit	Project	Consumer BU	\$4,050,000	\$1,860,000	909	(2,190,000)	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company-Wide Processor Upgrade	Proposal	Consumer BU	\$4,800,000	\$8,550,000	1,233	3,750,000	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Editing Software Upgrades	Asset	Consumer BU	\$1,830,000	\$2,190,000	387	360,000	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Energy-Efficiency Venture	Proposal	Consumer BU	\$4,800,000	\$8,550,000	1,233	3,750,000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Expense Management Initiative 3	Project	Consumer BU	\$4,050,000	\$1,860,000	909	(2,190,000)	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Feasibility - Survey Team	Project	Consumer BU	\$4,050,000	\$1,860,000	909	(2,190,000)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Financial Management Base	Asset	Consumer BU	\$2,190,000	\$2,550,000	639	360,000	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Firewall Enhancement 2.8	Asset	Consumer BU	\$1,830,000	\$2,190,000	387	360,000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Grow Inside Sales Force	Project	Consumer BU	\$2,970,000	\$2,640,000	666	(330,000)	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hard Drive Maintenance Program	Asset	Consumer BU	\$1,830,000	\$2,190,000	387	360,000	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Intranet Expansion East Coast	Project	Consumer BU	\$2,970,000	\$2,640,000	666	(330,000)	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Intranet	Project	Consumer BU	\$2,970,000	\$2,640,000	666	(330,000)	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add Content By Phase: Proposal **Add** **View Content List** **Save**

Notes

Notes to be added on save:

Save
Copy
Cancel

Figure 2-1. Scenario Comparison page

For More Information

Potential installation and upgrade impacts are discussed in [What-If Analysis on page 54](#).

For more information, see:

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

New and Improved Resource Search

New search capabilities make it easier to find the right resource or resolve resource conflicts. Most resource management products focus on projects, but in the real world of IT, resources usually work on projects and operational activities, with operational activities making up a large percentage of the work.

Release 6.0 focuses on both skills and availability, and availability considers both project activities and KTLO (Keep the Lights On, or operational) activities.

Search results are ranked based on a best-fit algorithm, displaying resource availability for the time period in question, including drill-down access to the actual work items assigned to each resource. This feature makes it faster and easier for project or resource managers to resolve staffing issues or resource conflicts.

Resource search can now be accessed from more screens in Mercury IT Governance Center applications, including the Project Workbench and Staffing Profiles.

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

[Figure 2-2](#) shows the Search Resources page.

The screenshot shows the Mercury IT Governance Center interface. The top navigation bar includes the Mercury logo, 'IT Governance Center', and a breadcrumb trail: 'Dashboard - Front Page > Dashboard - Program Manager > Analyze Current Portfolio > Search Resources'. A 'SIGN OUT' button is in the top right. The left sidebar contains a navigation menu with sections: Dashboard, Create, Search (with sub-items: Allocations, Budgets, Financial Benefits, Initiative Requests, Organization Units, Packages, Programs, Project Issues, Project Resource Requests, Project Risks, Project Scope Changes, Projects, Reports, Requests, Resource Pools, Resources, Skills, Staffing Profiles, Tasks, Time Sheets), Saved Searches (Manage Saved Searches, JCTest), Request Searches, Bug Search, Reports, and Resource. The main content area is titled 'Search Resources' and contains a search form. The form includes a header 'Search for Resources' and a sub-header 'Please use the search criteria below to find the Resources you wish to view.' The search criteria are: Username (text input), Skill (text input with a dropdown icon and a 'Primary Skill Only' checkbox), First Name (text input), Last Name (text input), Department (text input with a dropdown icon), Location (text input with a dropdown icon), Manager (text input with a dropdown icon), Category (text input with a dropdown icon), Organization Unit (text input with a dropdown icon), Title (text input with a dropdown icon), and Minimum Capacity (text input with a '%' sign). Below the search criteria are sorting options: 'Sort By: Username' (dropdown), 'Ascending' (radio button, selected), and 'Descending' (radio button). There is also a 'Maximum Results Per Page: 50' (text input). A 'Search' button is located at the bottom right of the form.

Figure 2-2. Search Resources page

For More Information

Potential installation and upgrade impacts are discussed in [Resource and Organization Model Impacts](#) on page 51.

For more information, see:

- *Guide to Documentation*
- *Mercury Change Management User's Guide*
- *Mercury Demand Management User's Guide*
- *Mercury Portfolio Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury Resource Management User's Guide*

Document Management Capabilities

In prior releases, Mercury IT Governance Center offered the ability to attach many types of unstructured content to project components—including requirements, business justifications, deliverables, and diagrams.

The optional document management module now available in release 6.0 of Mercury IT Governance Center gives users greater control over storing and searching documents than is possible in the standard Mercury IT Governance Center applications. The Mercury document management technology, created by EMC/Documentum (as Documentum Content Management) and available direct from Mercury, allows customer organizations to track, index, and search multiple versions of the supporting documents that are attached to many Mercury IT Governance Center entities—for example, entities included in:

- Mercury Demand Management™
- Mercury Portfolio Management
- Mercury Program Management™
- Mercury Project Management™

Documents managed in these environments are always directly related to a Mercury IT Governance Center entity—for example, a request (including portfolios, proposals, projects, and assets), project plan, or program—through the standard attachment field and document references functionality in Mercury IT Governance Center.

Figure 2-3 and *Figure 2-4* show the additional search capabilities available with document management.

The screenshot shows the 'Search Requests' interface. At the top, there is a 'View Details for Request #' field with a 'Go' button and 'Search' and 'Cancel' buttons. Below this is the 'Search Information' section with a 'Clear Fields' button. The search criteria include: Request Type, Status, Assigned To, Created By, Department, Workflow, Contact, Linked Project/Task, Creation Date (From/To), Last Update Date, Request Key Words (circled in black), Preventing Action, Eligible for My Account (Yes/No), and Include Closed? (Yes/No). There is also a 'Tasks' checkbox.

Figure 2-3. Searching a request (without document management)

The screenshot shows the 'Search Requests' interface with document management capabilities. It includes the same search criteria as Figure 2-3, but with additional fields: 'Document Key Words' and 'Document File Name' (with a 'Contains' checkbox). The 'Request Key Words', 'Document Key Words', and 'Document File Name' fields are circled in black.

Figure 2-4. Searching a request (with document management)

For More Information

Potential upgrade impacts are discussed in [\(Upgrade Only\) Document Management Impacts on page 57](#).

For more information, see:

- *Document Management Guide and Reference*
- *System Administration Guide and Reference*

Enhanced Connectivity, Synchronization, and Integration

This section includes information about:

- Enhancements to the Dashboard
- Increased integration between Project Management and Resource Management
- Conversion of additional Project Management functions to HTML

Enhancements to the Dashboard

In prior releases, the Mercury IT Governance Dashboard™ was embedded in the Mercury IT Governance Center technology and code base.

Recognizing that many customers want to integrate a variety of additional data sources into their Dashboards, Mercury has included in the release 6.0 Dashboard support for key industry standards like JSR 168 (Java Specification Request) and WSRP (Web Services for Remote Portlets). Beyond allowing Mercury Centers to share portlets, it also allows customers to plug many third-party systems directly into the IT Governance Dashboard. Similarly, IT Governance portlets can also be used in third-party JSR 168-compliant portals.

JSR 168 is a specification that defines a set of Application Programming Interfaces (APIs) for Java portlets, and addresses standardization for preferences, user information, portlet requests and responses, deployment packaging, and security. JSR 168 was developed using JCP (Java Community Process) services, which is an open, international, community-based organization facilitating the development of Java standards.

WSRP is an industry standard that defines how to plug remote Web services into the pages of online portals and other user-facing applications. This allows portal or application owners to embed a Web service from a third party into a portlet—either a .NET or a Java portlet. The portlet then displays interactive content and services that are dynamically updated from the provider's own servers.

Additional new features in release 6.0 of the Mercury IT Governance Dashboard include:

- Drag-and-drop personalization that allows users to select portlets from the many portlets that are available, and lay them out in whatever order they like

- An auto-refresh attribute that automatically reloads Dashboard pages at user-specified intervals
- Configuration performed exclusively in the Mercury IT Governance Center standard interface (although the data source must still be created in the Workbench)

Figure 2-5 shows a sample program manager Dashboard.

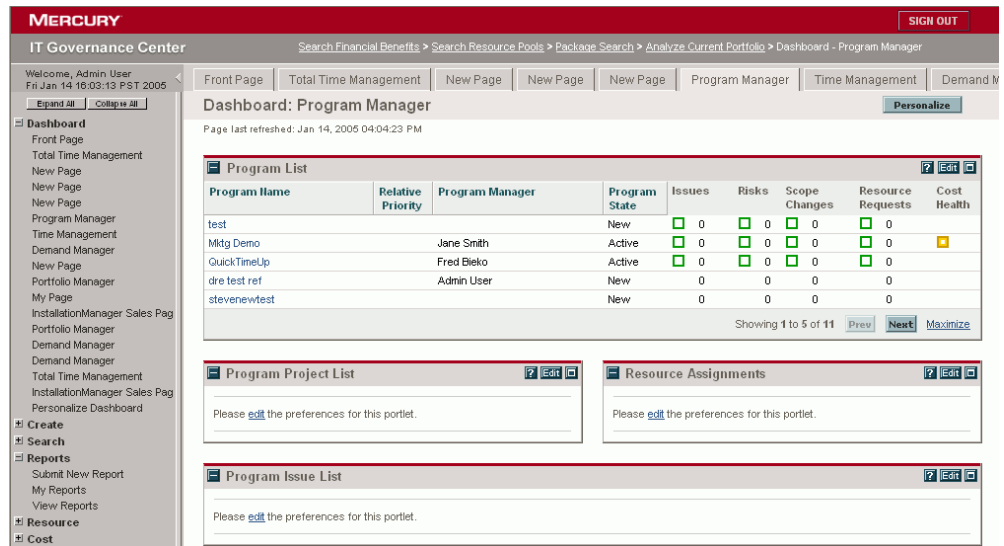


Figure 2-5. Release 6.0 Dashboard

For More Information

Potential installation and upgrade impacts are discussed in *(Upgrade Only) Dashboard Impacts* on page 49.

For more information, see:

- *Getting Started*
- *Configuring the Standard Interface*

Increased Integration Between Project and Resource Management

Enhancements to release 6.0 include capabilities that allow skills to be assigned to tasks in the planning phase of a project. This allows project managers to consider resource requirements at an early stage, before it becomes necessary to specify a resource by name.

A new Unassigned Resource Load view shows work assigned at the skill level that has not yet been assigned to a named resource. Once a specific resource has been assigned, availability and utilization are automatically updated.

Release 6.0 also provides project managers with the ability to use skill rates instead of resource rates when a resource rate is not available.

For More Information

For more information, see:

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

Conversion of Project Management Functions to HTML

In release 6.0, a significant amount of Project Management functionality has been shifted from the Workbench to the Mercury IT Governance Center standard interface, making it easier for project managers to use. Using the standard (HTML) interface, project managers can now:

- Update task actuals, including start date, finish date, duration, effort, status, and other enabled actual fields
- Update percent complete
- Assign resources and change assignments
- Update multiple assignments on a single page
- Access the resource search capabilities discussed in [New and Improved Resource Search on page 18](#)

Figure 2-6 shows how task information could be updated in the Mercury IT Governance Center standard interface.

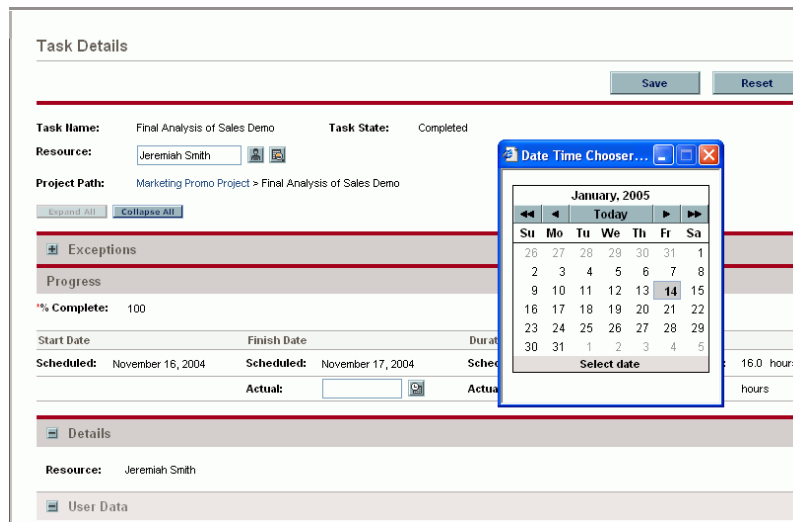


Figure 2-6. Task Details window in the standard (HTML) interface

Enhanced Features for International Business

In release 6.0, Mercury IT Governance Center provides:

- Support for unlimited international calendars
- Multicurrency support

Support for Unlimited International Calendars

Release 6.0 includes additional support for multisite organizations through unlimited international calendars.

A new concept of region is associated with a regional calendar and a local currency. Regions are assigned to project, budget, organization unit, resource, and skill entities, so these entities can get their regional calendar and local currency from the linked region.

A new **Regional Calendars** menu in the standard interface has the submenus **View Regional Calendars** and **Create Regional Calendar** (the latter available only to users with the appropriate access grants listed and described in [Table 3-2 on page 50](#)).

The Mercury-supplied regional calendars are shown in [Figure 2-7](#).

The screenshot shows the Mercury IT Governance Center interface. The main content area is titled 'Modify Regional Calendars' and contains a table with the following data:

Name	Enabled
Australia	Yes
Brazil	Yes
Canada	Yes
France	Yes
Germany	Yes
Israel	Yes
Italy	Yes
Singapore	Yes
Spain	Yes
UK	Yes
US (System Default)	Yes

Below the table is a 'Filter Regional Calendars' section with the following fields:

- Name:
- Enabled:
- Used by Resource:
- Used by Project:
- Used by Org Unit:
- Used by Region:

Figure 2-7. Regional calendars

Each organization unit or project can specify a different calendar. This capability increases the flexibility in defining work schedules used by resource and project managers to staff projects and resolve resource issues.

Figure 2-8 shows the regional calendar for Spain.

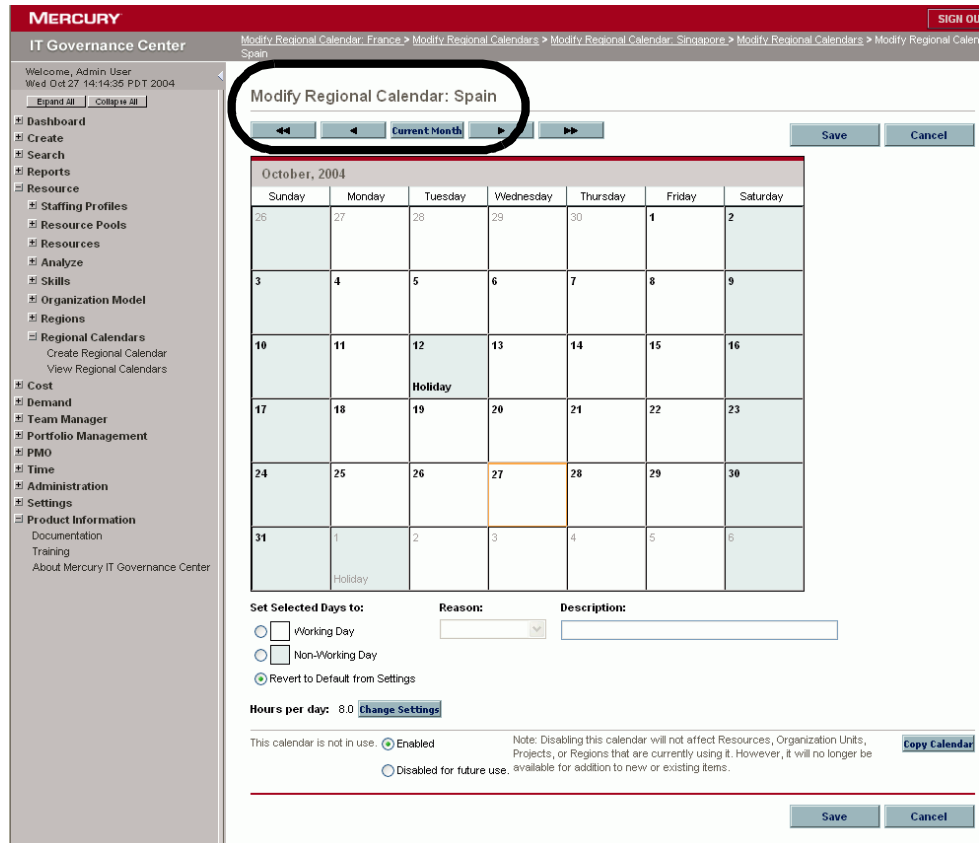


Figure 2-8. Regional calendar for Spain

As was true in prior releases, the scheduling engine in Mercury Project Management uses calendar information when building the schedule for a project and assignments.

In addition, release 6.0 includes new screens in the HTML interface to update resource calendars, which allow users to update their own calendars, if business rules permit. If organizations require pre-approval of calendar updates, workflows in Mercury Demand Management can be used to digitize, enforce, and automate the process of updating resource calendars.

For More Information

Potential installation and upgrade impacts are discussed in [Calendar and Currency Impacts on page 52](#).

For information, see:

- *Commands, Tokens, and Validations Guide and Reference*
- *Mercury Financial Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury Resource Management User's Guide*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*
- *System Administration Guide and Reference*

Multicurrency Support

Most global organizations do part of their financial planning on a local basis. For example, a business unit headquartered in Europe might budget and review financial information in euros, while the parent corporation in the United States reviews the same information in U.S. dollars.

Multicurrency support in release 6.0 of Mercury IT Governance Center allows multiple currencies in the budgeting process and in actual costs on projects and programs.

New product capabilities include:

- Storage of exchange rates with date ranges
- Individual resource rates in a local currency
- Currency settings at the project and program level
- Personal preferences for budgets, portfolios, programs, and projects for the default currency

Users in one geographic region or country can be using one currency preference for entering and viewing financial data, while users in other areas can see data in different currencies. Conversions are automatic using the appropriate exchange rate.

Portlets provide visibility into currency exposure for organizations that have a large portion of their budgets planned in foreign currencies, and are therefore

exposed to greater risk of fluctuating exchange rates. These views help such organizations proactively identify areas of exposure, so they can appropriately hedge against them.

Figure 2-9 shows these new capabilities.

The screenshot shows a user profile editing page. At the top is the 'Edit My Profile' header. Below it is a 'Change Password' section with three input fields for 'Old Password', 'New Password', and 'Repeat New Password'. The next section is 'Overview Page Section Preferences', which includes a 'Results in Maximized Portlets' input field with the value '50'. The 'Cost Display' section is highlighted with a black rounded rectangle and contains the text 'I prefer to see Costs displayed in the:' followed by two radio button options: 'Base Currency, United States Dollar (USD)' (which is selected) and 'Local Currency'. At the bottom right of the form is a 'Done' button.

Figure 2-9. Multicurrency support

For More Information

Potential installation and upgrade impacts are discussed in [Calendar and Currency Impacts on page 52](#).

For more information, see:

- *Mercury Financial Management User's Guide*
- *Mercury Portfolio Management User's Guide*
- *Mercury Program Management User's Guide*
- *Mercury Resource Management User's Guide*
- *Mercury Time Management Resource Guide*
- *Open Interface Guide and Reference*
- *System Administration Guide and Reference*

Enhanced Product Usability

This section provides information about the following features:

- Interface improvements
- Expanded and enhanced product documentation
- Simplified license model
- Report conversions

Interface Improvements

In prior releases, Mercury IT Governance Center used the “Mercury Interactive blue” brand scheme.

In release 6.0, Mercury IT Governance Center products now use the Mercury common brand, with red and gray being the dominant colors, as shown in [Figure 2-10](#).

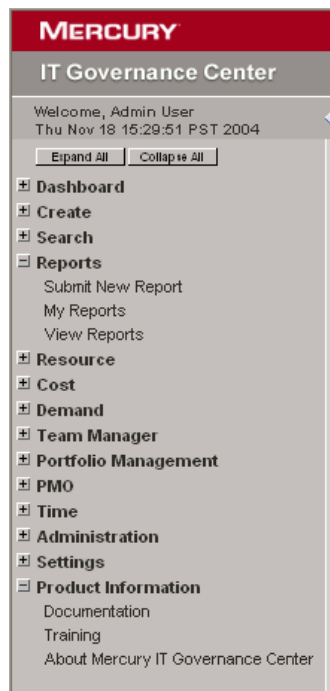


Figure 2-10. Rebranded colors (standard interface menu bar)

The interface has also been enhanced for usability and accessibility. New interface features include:

- Drag-and-drop personalization on the Dashboard
- Newly integrated ILOG charting technology for higher resolution graphs
- Cleaner, lighter user interface

Figure 2-11 shows the drag-and-drop personalization.

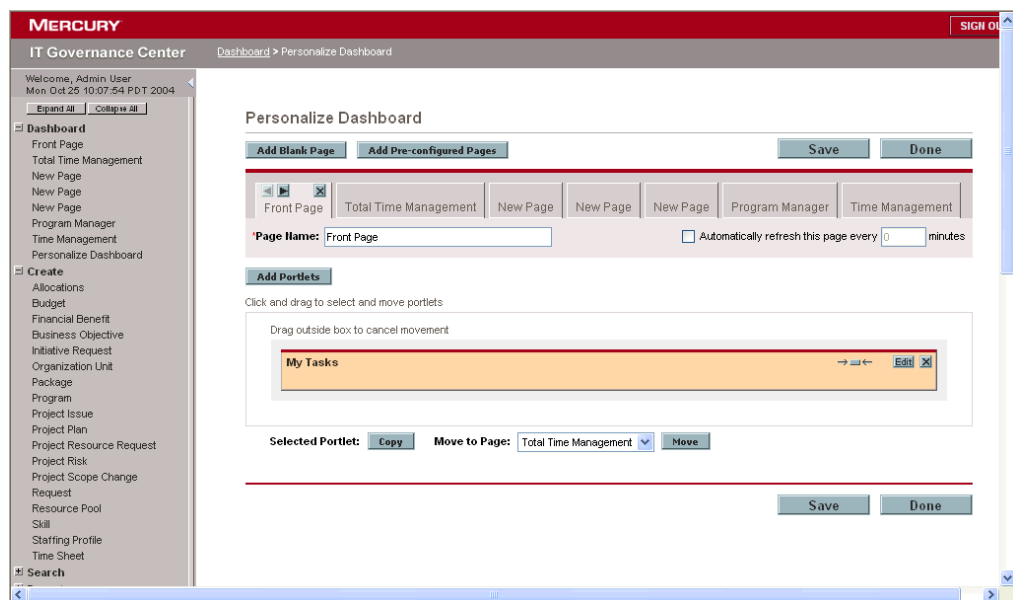


Figure 2-11. Interface improvements: Personalize Dashboard page

For More Information

Potential installation and upgrade impacts are discussed in *(Upgrade Only) Dashboard Impacts* on page 49.

For more information, see:

- *Configuring the Standard Interface*
- *Key Concepts*
- *Getting Started*

Expanded and Enhanced Product Documentation

The documentation available in release 6.0 has been significantly expanded and enhanced. The Mercury IT Governance Center **Product Information** includes a new HTML-based home page (available through both the standard interface and the Workbench) from which users can access both HTML and PDF documents describing the complete Mercury IT Governance Center product set.

The documentation PDF files are also:

- Available from the Mercury IT Governance Download Center
- Installed automatically during product installation or upgrade

Figure 2-12 shows the Mercury IT Governance Center Documentation home page.

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Mercury IT Governance Center Documentation

Click a title or link to view a document (available in HTML, PDF, or both).

General Interest	
What's New in Release 6.0	PDF Version
Guide to Documentation	PDF Version
Getting Started	PDF Version
Key Concepts	PDF Version

End Users	
Mercury Change Management User's Guide	PDF Version
Mercury Demand Management User's Guide	PDF Version
Mercury Financial Management User's Guide	PDF Version
Guide to Tracking and Managing IT Demand	PDF Version
Mercury Portfolio Management User's Guide	PDF Version
Mercury Program Management User's Guide	PDF Version
Mercury Project Management User's Guide	PDF Version
Mercury Resource Management User's Guide	PDF Version
Mercury Time Management User's Guide	PDF Version

Can't find the information you need?
See [Guide to Documentation](#) for details about your product documentation.
Or, open any HTML document and use the [Index](#) and [Search](#) tabs.

System Administration (for system, instance, and database administrators)	
System Administration Guide and Reference (includes installation, upgrade, and migration information)	PDF Version
Document Management Guide and Reference	PDF Version

Configuration (for application administrators, application developers, and configurators)	
Guides	
Mercury Change Management: Configuring a Deployment System	PDF Version
Mercury Demand Management: Configuring a Request Resolution System	PDF Version
Configuring IT Demand Tracking and Management	PDF Version
Configuring the Standard Interface	PDF Version
Mercury Portfolio Management Configuration Guide	PDF Version
Mercury Program Management Configuration Guide	PDF Version
Mercury Time Management Configuration Guide	PDF Version

Combination Guides and Reference Manuals	
Commands, Tokens, and Validations Guide and Reference	PDF Version
Open Interface Guide and Reference	PDF Version
Reports Guide and Reference	PDF Version
Security Model Guide and Reference	PDF Version

Additional Information (available at the Mercury IT Governance Download Center)	
System Requirements and Compatibility Matrix	
Mercury Change Management Extensions	
Mercury Object Migrator and Mercury GL Migrator	
Release Notes	

Figure 2-12. Mercury IT Governance Center Documentation home page

For More Information

For information about the new location for detailed information about installing or upgrading to release 6.0, see [New Location for Installation and Upgrade Information on page 46](#).

For more information about the release 6.0 documentation set, including changes from prior releases, see the *Guide to Documentation*.

Simplified License Model

Release 5.5 had product licenses along with the concept of a standard license (for end users) and a power license (for application administrators or application developers). In addition, an administrator license provided the kind of access and permissions required by a system administrator.

Mercury IT Governance Center Release 6.0 has three types of licenses:

- **Application licenses**

Authorization granted to users who create process work items in Mercury IT Governance Center.

There are six application licenses for the Mercury IT Governance Center core products:

- Mercury Change Management™
- Mercury Demand Management
- Mercury Portfolio Management

Users with a Mercury Portfolio Management license must also have a license for Mercury Demand Management.

- Mercury Program Management

Users with a Mercury Program Management license must also have licenses for Mercury Demand Management and Mercury Project Management.

- Mercury Project Management
- Mercury Time Management™

Users with any application license also get Mercury Financial Management™ and Mercury Resource Management™.

- **(User) administration license**

Authorization granted to user administrators, application developers, or configurators who perform tasks like setting up users and assigning security.

- **Configuration license**

Authorization granted to system, instance, or database administrators, or to application developers or configurators, who perform tasks like configure business processes, and maintain Mercury IT Governance Center products.

For More Information

For more information, see:

- [Licensing Changes in Release 5.5 on page 44](#)
- [Licensing Impacts on page 47](#)
- *Configuring the Standard Interface*
- *Security Model Guide and Reference*
- *System Administration Guide and Reference*

Reports Conversions

All Mercury IT Governance Center reports (except server reports) are now submitted and viewed in the standard (HTML) interface, including:

- Scheduling of both individual and repeating reports
- Configuration of notifications for reports
- Ability to specify report field dependencies

You can access the screens that manage HTML-based reports through the **Reports** menu, as shown in *Figure 2-13*.

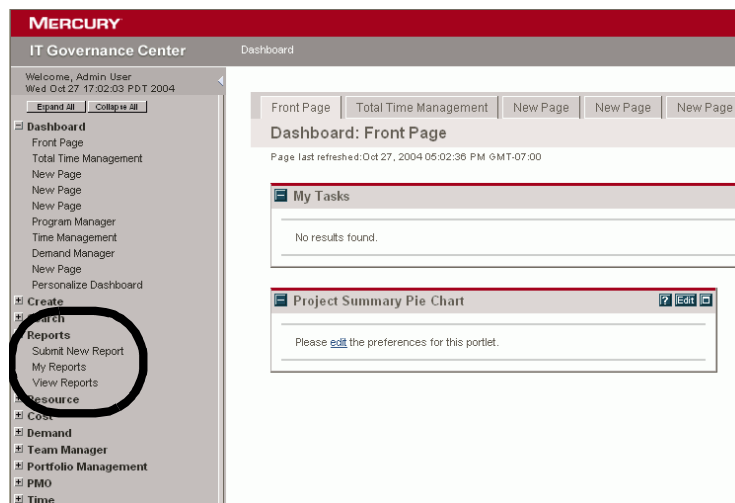


Figure 2-13. Reports menu in the standard interface

For example, if you select **Reports > Submit Report**, the Submit New Report page opens, showing up to five of the most recently submitted reports in the top section, and Select Report by Category at the bottom. *Figure 2-14* shows reports in the Project Management category selected.

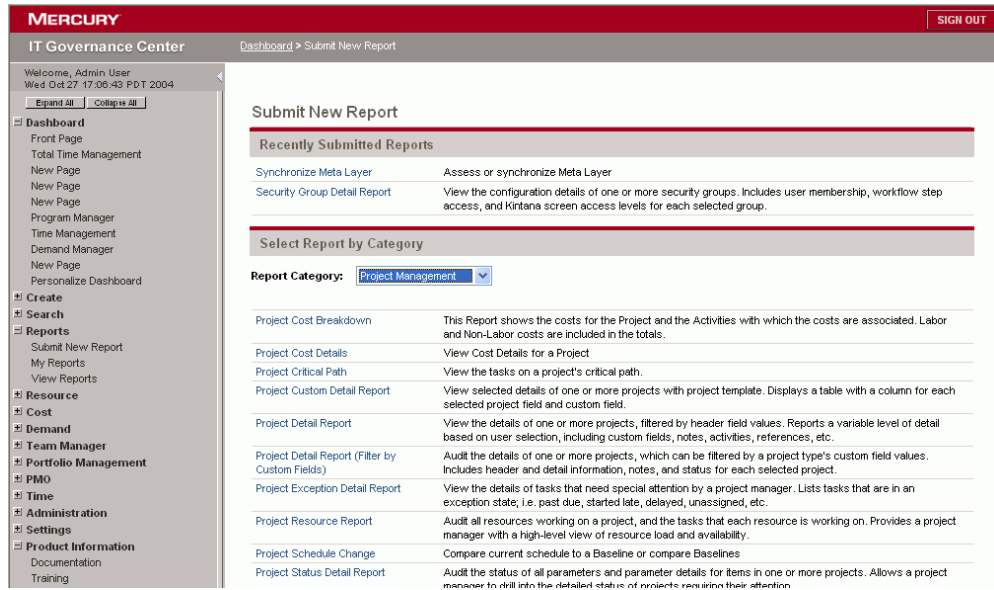


Figure 2-14. Submit New Report page

For More information

Potential installation and upgrade impacts are discussed in *(Upgrade Only) Reports Impacts* on page 55.

For more information about running and viewing reports in release 6.0, see the *Reports Guide and Reference*.

Self-Service Updates to Resource Calendars

Individual resources can update their own calendars in release 6.0.

In organizations requiring greater control, managers can prevent a single users, groups of users, or all users from making these calendar changes. If an organization requires pre-approval of calendar updates, workflows in Mercury Demand Management can be used in conjunction with resource calendars to digitize, enforce, and automate the process of updating resource calendars.

Changes to Logging

In release 6.0, the JDBC logs contain new data that increase the usefulness of the system logs.

Each log entry includes:

- The identifier of the active user session to which the log entry pertains
- The user ID of the user on whose behalf the server was working at the time of the log entry

Taken together, these two pieces of information make it easier to identify related log entries and to identify specific user operations as they are logged.

The user session identifier is particularly important because it can be used to correlate the Mercury IT Governance Server and the JDBC logs with the HTTP server logs, facilitating the process of triaging user problems.

Release 6.0 also includes a merge utility that combines the HTTP, JDBC, and server logs to provide an integrated XML log format that can facilitate debugging.

Additional Product Enhancements

Additional enhancement in release 6.0 include:

- SOP 98-1 monitoring and enforcement
- Enhanced portfolio security
- Time management enhancements
- Request search enhancements

SOP 98-1 Monitoring and Enforcement

SOP 98-1 (Statement of Position 98-1, Accounting for the Costs of Computer Software Developed or Obtained for Internal Use) was issued by AcSEC (Accounting Standards Executive Committee, the senior technical committee of Certified Public Accounts) in 1998 to establish guidelines on accounting for costs incurred related to internal software development and use.

SOP 98-1 requires the capitalization of costs directly attributable to the creation of application software for “material” internal use. All other costs in connection with an internal use software project are to be expensed as incurred. As corporate and outside auditors look more closely at all aspects of accounting practices, CIOs must pay closer attention to SOP 98-1 compliance.

Mercury Financial Management assists with SOP 98-1 compliance by tracking the distinction between capital and operating expenses in projects and tasks. This means that project managers using Mercury IT Governance Center are using an accurate, dependable, and auditable project management and cost tracking system that allows costs to be tracked, allocated, and reported properly under SOP 98-1 regulations.

For More Information

Potential installation and upgrade impacts are discussed in [Time Tracking and Ties Between Actuals](#) on page 53.

For more information, see:

- *Mercury Financial Management User’s Guide*
- *Mercury Program Management User’s Guide*
- *Mercury Project Management User’s Guide*
- *Security Model Guide and Reference*

Enhanced Portfolio Security

Mercury Portfolio Management now provides more granular levels of portfolio security. Proposals, projects, and assets can be segregated by business unit or organizational unit. This allows the CIO, for example, to see all proposals, whereas the retail business unit can see only the proposals belonging to its organization.

For More Information

Potential installation and upgrade impacts are discussed in [Security Impacts on page 50](#).

For more information, see:

- *Mercury Portfolio Management Configuration Guide*
- *Mercury Portfolio Management User's Guide*

Time Management Enhancements

New functions, screens, and portlets in Mercury Time Management provide standard functionality for customers to create time sheet policies that enforce various business rules for groups of users. This includes the ability to restrict a user to one time sheet per period, and minimum and maximum hours entered.

For More Information

Potential installation and upgrade impacts are discussed in [\(Upgrade Only\) Financial, Project, and Time Management Impacts on page 53](#).

For more information, see:

- *Mercury Time Management Configuration Guide*
- *Mercury Time Management User's Guide*

Request Search Enhancements

Enhancements in release 6.0 allow users to search for blank values in text fields, date fields, and fields using auto-complete. This allows you, for example, to search for all requests where the Assigned To field is blank. This feature is available from both the basic and advanced search screens.

For More Information

For more information, see:

- *Mercury Demand Management Configuration Guide*
- *Mercury Demand Management User's Guide*

Enhancements to the Change Management Extensions

For information about release 6.0 enhancements to the Mercury Change Management Extensions, see the appropriate Extension documentation (which is listed and described in the *Guide to Documentation*).

Feature Summary from Release 5.5

Summarized in this section are significant product and support changes for release 5.5 of Mercury IT Governance Center.

This information would probably be of interest only to customers upgrading from release 5.0 to release 6.0 of Mercury IT Governance Center.

Product Name Changes in Release 5.5

Between release 5.0 and release 5.5, the Mercury IT Governance Center products changed names as shown in [Table 2-1](#). There are no additional product name changes in release 6.0.

Table 2-1. Product name changes (release 5.0 to 5.5/6.0)

Name in release 5.0	Name in Release 5.5/6.0
Kintana Deliver	Mercury Change Management
Kintana Create and Kintana Demand Management Solution	Mercury Demand Management (The prior product and solution were consolidated into a single product)
Kintana Financial Management	Mercury Financial Management
Kintana Portfolio Management	Mercury Portfolio Management
Kintana Program Management Office Solution	Mercury Program Management
Kintana Drive	Mercury Project Management
Kintana Resource Management	Mercury Resource Management
Kintana Time Management Solution	Mercury Time Management
Kintana Accelerators	Mercury Change Management Extensions
Kintana GL*Migrator	Mercury GL Migrator
Kintana Object*Migrator	Mercury Object Migrator

Licensing Changes in Release 5.5

The following licensing changes were made in release 5.5:

- A new license type of administrator was added, making three types:
 - Standard
 - Power
 - Administrator
- Release 5.0 Dashboard power licenses were converted to administrator licenses
- Release 5.0 power suite licenses were converted to a combination of power and administrator licenses
- Suite licenses were converted to licenses for individual products

Technology Changes in Release 5.5

Mercury IT Governance Center became J2EE compliant in release 5.5; it contained an embedded J2EE application server and standard J2EE Web server integration modules.

The release 5.0 Resin module was replaced with a Java Web server plug-in to handle HTTP and HTTPS traffic.

Release 6.0 Installation and Upgrade Impacts

In This Chapter:

- *New Location for Installation and Upgrade Information*
- *Licensing Impacts*
- *(Upgrade Only) Dashboard Impacts*
 - *Controlling the Width of Portlets*
 - *Changing Portlet Titles*
 - *Controlling Results in Maximized Portlets*
 - *Restoring Preference Fields to Their Defaults*
 - *Adding and Removing Columns*
 - *Controlling the Number of Portlet Columns*
- *Security Impacts*
 - *Access Grants Assigned to Security Groups*
 - *Resource and Organization Model Impacts*
- *Calendar and Currency Impacts*
 - *Upgrade Impacts*
 - *Installation Impacts*
- *(Upgrade Only) Financial, Project, and Time Management Impacts*
 - *Time Tracking and Ties Between Actuals*
 - *Skill Rates*
 - *What-If Analysis*
 - *Time Sheet Policies*
 - *(Microsoft Project Users Upgrading from Release 5.0) Updating Project Data*
- *(Upgrade Only) Reports Impacts*

- *Report Categorization and Required License*
 - *New Submit Report Access Grant*
 - *New Report Category Validation*
 - *Changes to Report Type: Synchronize Meta Layer Window*
 - *(Upgrade Only) Document Management Impacts*
 - *Changes to Reports*
 - *Other Impacts*
 - *(Upgrade from Release 5.0 Only) Kintana Service Registry Entry*
-

New Location for Installation and Upgrade Information

In releases 5.0 and 5.5, installation and upgrade information was in documents titled *Installation Guide* and *Upgrade Guide*.

In release 6.0, installation and upgrade information has been consolidated (along with other system administration topics) in the *System Administration Guide and Reference*. This change was made to provide more efficient search and access to information.

A new document, *Release Notes*, has been added in release 6.0. This document contains product issues and anomalies, along with any last-minute information not in the regular documentation set. Always check the latest version of the *Release Notes*, which are on the Mercury IT Governance Download Center, before installing, re-installing, upgrading to, or adding a product patch to release 6.0 of Mercury IT Governance Center.

A renamed document, *System Requirements and Compatibility Matrix* (formerly titled *Compatibility Matrix*) provides system requirements and product compatibility information for organizations installing or upgrading to release 6.0. This document also provides information about products that were supported in prior releases of Mercury IT Governance Center but are no longer supported in release 6.0.

Licensing Impacts

The upgrade process handles conversion of release 5.0 and 5.5 licenses to the new release 6.0 licensing model.

For your information, [Table 3-1](#) shows the relationships and conversion ratio between release 5.5 and 6.0 licenses (for information about licensing changes between release 5.0 and 5.5, see [Licensing Changes in Release 5.5 on page 44](#))

Table 3-1. Licensing changes in release 6.0

Release 5.5 License	Release 6.0 License	Conversion Ratio (5.5 to 6.0)
Demand Management Standard	Demand Management	1 to 1
Demand Management Power	Demand Management	1 to 1
Project Management Standard	Project Management	1 to 1
Project Management Power	Project Management	1 to 1
Portfolio Management	Portfolio Management Note: A user with this license must also have a Demand Management license.	1 to 1
Program Management	Program Management Note: A user with this license must also have Demand Management and Project Management licenses.	1 to 1
Time Management	Time Management	1 to 1

Table 3-1. Licensing changes in release 6.0 [continued]

Release 5.5 License	Release 6.0 License	Conversion Ratio (5.5 to 6.0)
Administrator	User administration + Configuration	1 to 2 (1 release 6.0 user administration and 1 release 6.0 configuration license per release 5.5 administrator license)
N/A	Configuration	50 to 1 (1 release 6.0 configuration license for each set of 50 release 5.5 power licenses across release 5.5 license types)

(Upgrade Only) Dashboard Impacts

Listed in the sections below are the potential impacts related to the release 6.0 changes in the Mercury IT Governance Dashboard.

Controlling the Width of Portlets

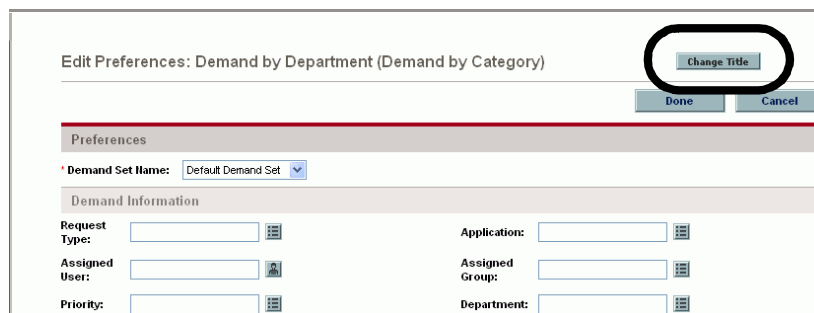
Release 5.5 had the concept of expansion as an intrinsic property of the portlet.

In release 6.0, width is a property that can be controlled by the user.

Changing Portlet Titles

In release 5.5, you needed to edit a field to change a portlet title.

In release 6.0, you click the **Change Title** button (shown in [Figure 3-1](#)) and interact with a pop-up.



The screenshot shows a dialog box titled "Edit Preferences: Demand by Department (Demand by Category)". At the top right, there is a "Change Title" button circled in black, and "Done" and "Cancel" buttons below it. The dialog is divided into sections: "Preferences" with a "Demand Set Name" dropdown menu set to "Default Demand Set", and "Demand Information" which contains several input fields: "Request Type", "Application", "Assigned User" (with a user icon), "Assigned Group", "Priority", and "Department". Each input field has a small icon to its right.

Figure 3-1. Changing portlet titles

Controlling Results in Maximized Portlets

The number of results in maximized portlets is no longer controlled by the user's global My Profile setting, except for overview page portlets.

Restoring Preference Fields to Their Defaults

In release 5.5, preference fields could be restored to their default values through a **Restore Default** button on portlet preferences pages.

In release 6.0, you need to restore the preference fields manually, or else remove and add the portlet.

Adding and Removing Columns

In release 6.0, portlet columns can be added and removed from both the normal and maximized views.

Controlling the Number of Portlet Columns

In release 6.0, there is no longer a cap on the number of columns in a portlet on the maximized and normal views. You set the number of columns with the column chooser widget at the bottom of a portlet's preferences page.

Security Impacts

The following sections contain information about potential impacts in the area of security.

Access Grants Assigned to Security Groups

During the installation or upgrade process, the Mercury-supplied security groups are given the access grants shown in [Table 3-2](#).

Table 3-2. Security groups and the access grants assigned to them

Security Group	Access Grant
ITG Administrator	View Regions, Manage Regions, View FX Rates, Manage FX Rates
ITG Cost Manager	View Regions, Manage FX Rates
ITG Program Manager	View Regions, Manage FX Rates
ITG Project Manager	View Regions, Manage FX Rates
ITG Resource Manager	Manage Regions, View FX Rates

Resource and Organization Model Impacts

The following sections discuss potential resource and organization model impacts.

Upgrade Impacts

When no organization model existed before:

- All existing resources will be associated with at least one non-matrixed organization unit.
- The Unspecified organization unit is Mercury-supplied and cannot be deleted.

When an organization model existed before:

The category field of organization units will be called Type. In release 5.5, this field had a Mercury-supplied value of Matrixed Team. In release 6.0, a new property on organization units determines if an organization unit is matrixed or non-matrixed.

All organization units with the category of Matrixed Team will be upgraded as matrixed organization units, except as described in the following bulleted items:

- In release 6.0, every resource must exist in one and only one non-matrixed organization unit.
- If any 5.5 resources exist in more than one non-matrixed organization unit, those resources will be added to an unspecified non-matrixed organization unit, and their prior organization units will be converted to matrixed organization units.
- A log of these actions is available in the system `logs` directory.

Resources that did not belong to any organization unit in release 5.5 will be put into the Unspecified organization unit during the upgrade process.

Installation Impacts

When new resources are created, they will go into the Unspecified organization unit.

Calendar and Currency Impacts

Release 6.0 has regional calendars, as discussed in [Support for Unlimited International Calendars on page 27](#). The upgrade and installation impacts of this new feature are described in the following sections.

Upgrade Impacts

During the release 6.0 upgrade, the single base calendar will be upgraded to the default regional calendar, which is the calendar for the United States. After upgrading to release 6.0, you can choose another regional calendar (or multiple calendars) for your organization.

The default currency is the United States dollar (USD). During upgrade you are asked to choose the system base currency from the available list of supported currencies.



Note

Once you have chosen the system base currency you cannot change it. For more information, see the *System Administration Guide and Reference*.

You also need to select the region that will contain the system default regional calendar and currency. The new region will be created and added to the Unspecified organization unit along with all the entities in the system that need to have a region assigned to them (for example, organization units, projects, budgets, and skills).

Installation Impacts

During installation you will be asked to choose the system default regional calendar and system base currency.



Note

Once you have chosen the system base currency you cannot change it. For more information, see the *System Administration Guide and Reference*.

You also need to select the region that will contain the system default regional calendar and currency. The new region will be created and added to the Unspecified organization unit along with all the entities in the system that need

to have a region assigned to them (for example, organization units, projects, budgets, and skills).

(Upgrade Only) Financial, Project, and Time Management Impacts

The following section contain information about potential impacts in the area of project and time management.

Time Tracking and Ties Between Actuals

As described in [SOP 98-1 Monitoring and Enforcement on page 40](#), release 6.0 contains some key time-tracking enhancements in support of SOP 98-1, which mandates that IT determine which actual hours were worked on capital activities and which were worked on operating activities, and who performed the work.

Upgrading to release 6.0 will have an impact on those customers who have customized release 5.5 activity code validations that limit the items against which resources can track time.

Release 6.0 has a new mechanism to control time tracking that includes new validations to support it. If you want to keep your current time-tracking paradigm, you need to manually update your release 5.5 validations.

Skill Rates

In release 5.5, tasks on projects that have multiple resources assigned can have a different skill for each resource.

In release 6.0, this functionality has been removed, and all resources performing the same task must have the same skill.

In cases where tasks were assigned to multiple resources, the release 6.0 upgrade process assigns the skill of the first resource to all the resources.

What-If Analysis

During the upgrade process for release 6.0, values stored in the expected start and end date custom fields are moved into the field group fields for proposals and projects.

For proposals, the Expected Start Date and Expected Finish Date fields are moved to the field group. For projects, the Planned Start Date and Planned Finished Date fields are moved to the field group.

Scenario comparison graphs will be upgraded to use planned start and end date for proposals and projects in scenarios.

The release 6.0 upgrade process ensures that the budgets and staffing profiles linked to proposals have the same start periods. To accomplish this:

- For every pair of budget and staffing profile of a proposal that has mismatching start dates, the earlier date is used for both.
- Missing periods are padded with zero values.

For example, if the budget of a given proposal starts in January 2004 and the staffing profile starts in March 2004, two periods will be added to the front of the staffing profile, which will result in a staffing profile start date of January 2004 with zero values for January and February.

Time Sheet Policies

Release 6.0 has a default (also called *global*) time sheet policy, to which all existing resources are linked during the upgrade process.

You can create additional time sheet policies, as required, and link resources to them.

(Microsoft Project Users Upgrading from Release 5.0) Updating Project Data

In release 5.0 and prior releases, Kintana Drive (now Mercury Change Management) did not synchronize scheduled effort or actual effort values for projects where the project settings marked these two fields as disabled. Since the Mercury Resource Management visualizations (which is new in release 5.5 of Mercury IT Governance Center) rely on effort values, a release 6.0 upgrade from release 5.0 defaults effort values for these projects.

This default value is calculated with the assumption that the assignments in Microsoft Project were at 100% units (full-time allocation). This means that after the release 6.0 upgrade, the new Resource Management visualizations might show some resources as over allocated, in cases where the Microsoft Project assignments were at less than 100% units.

The inaccuracies are corrected the first time you synchronize each of your Mercury Project Management projects with Microsoft Project.

If your project integration style is specified as either **Microsoft Project controlled** or **Project Management controls actuals**, you need to use the Microsoft Project synchronization wizard to synchronize your Mercury Project Management project with your Microsoft Project file.

(Upgrade Only) Reports Impacts

As described in [Reports Conversions on page 37](#), submitting and viewing reports is now done almost exclusively in the Mercury IT Governance Center standard interface.

The sections below describe potential upgrade impacts resulting from these changes and from various improvements to the reporting process.

Report Categorization and Required License

Release 6.0 introduces report categorization and a required license for every report type:

- Reports that perform an action on the Mercury IT Governance Center system (for example, importing users or synchronizing views) required an administration license and are part of the administrative category.
- Reports that provide information about configurations across products accept any product license and are part of the administrative category.
- Some report types are categorized differently than they were in prior releases.

During upgrade to 6.0, all reference copies of reports are replaced, and customer copies are upgraded with the 6.0 changes.

New Submit Report Access Grant

The new access grant System: Submit Reports replaces all prior product-specific access grants for submitting reports. During the upgrade process to release 6.0, security groups having a product-specific access grant for submitting reports will be assigned the System: Submit Reports access grant.

Access grants from release 5.0 or 5.5 that are removed in the 6.0 upgrade are:

- Change Mgmt: Submit Change Mgmt Reports
- Demand Mgmt: Submit Demand Mgmt Reports
- Project Mgmt: Submit Project Mgmt Reports
- Time Mgmt: Submit Time Mgmt Reports

New Report Category Validation

Release 6.0 has a new multi-autocomplete validation called Report Category. The list of values is user maintainable.

During release 6.0 upgrade, deleted values are replaced, and renamed values are maintained.

Changes to Report Type: Synchronize Meta Layer Window

The Report Type: Synchronize Meta Layer window has two new fields:

- Requires License
- Report Category

The Product Scope field has been removed from this window.

(Upgrade Only) Document Management Impacts

As discussed in [Document Management Capabilities on page 20](#), new optional functionality in release 6.0 offers improvements to document management capabilities in Mercury IT Governance Center, giving users more control over storing and creating documents and searching for information.

If you are upgrading to release 6.0, and you are planning to install the document management module, you need to be aware that changes made to the presentation layer files and XML menu files are not preserved during the upgrade. You need to copy and rename these files before the upgrade.

For More Information

For more information, see the *Configuring the Standard Interface* document.

Changes to Reports

The following reports were either upgraded to the JSP report architecture or are new in release 6.0:

- Import Requests
- Import Users
- Project Cost Breakdown
- Project Cost Details
- TMG - Time Sheet Details (also renamed to Time Sheet Details)
- TMG - Time Sheet Summary (also renamed to Time Sheet Summary)
- User Detail

The following reports were renamed in release 6.0:

- TMG - Actual Time/Cost Summary (renamed to Actual Time/Cost Summary)
- TMG - Actual Time Summary (renamed to Actual Time Summary)
- TMG - Work Allocation Details (renamed to Work Allocation Details)

Other Impacts

Additional potential impacts include:

- The Workbench Only flag on report types is changed to **No**.
- The Send If Obsolete notification value is changed to **No**.
- All report notifications are changed to Immediate.
- Disabled notifications on report submissions are removed from the database, along with dependent rows in child tables.
- The subject of the new Mercury-supplied notification template is:
[RP.REPORT_TYPE_NAME] [RP.STATUS] on [RP.LAST_UPDATE_DATE]
- The Oracle database “any” grants in a Mercury IT Governance Center schema (for example, “grant any view”) that were required in release 5.0 and 5.5 to make the Reporting Meta Layer (RML) work are no longer required in release 6.0.
- (Upgrade only) The base URL changes with the upgrade to release 6.0.

This will affect users who have added the URL to their favorites list.

(Upgrade from Release 5.0 Only) Kintana Service Registry Entry

The Mercury IT Governance Center release 6.0 upgrade removes the Kintana service registry entry for Windows NT and 2000 and creates a new Mercury IT Governance Center service register entry. After the 6.0 upgrade, your release 5.0 Mercury IT Governance Center service name in the Windows Services dialog starts with *Mercury ITG* followed by the value of the KINTANA_SERVER_NAME parameter in the `server.conf` file.

If a Mercury IT Governance Center service name is not displayed in the Windows Services dialog after the upgrade, run the following command from the `<ITG_Home>/bin` directory to create the service:

```
ksvc.exe sync
```

A

access grants

- assigned to security groups **50**
- Change Mgmt: Submit Change Mgmt Reports **56**
- Demand Mgmt: Submit Demand Mgmt Reports **56**
- Manage FX Rates **50**
- Manage Regions **50**
- Project Mgmt: Submit Project Mgmt Reports **56**
- System: Submit Reports **56**
- Time Mgmt: Submit Time Mgmt Reports **56**
- View FX Rates **50**
- View Regions **50**

Actual Time Summary report **57**

Actual Time/Cost Summary report **57**

application license **35**

B

branding features **31**

C

calendar enhancements **27, 39, 52**

Change Management license **35**

Change Mgmt: Submit Change Mgmt Reports access grant **56**

Change Title button **49**

columns, portlet **50**

Compatibility Matrix, releases 5.0 and 5.5 **46**

configuration license **36, 48**

connectivity features **23**

cost tracking enhancements **40**

currency

- system base **52**

- United States dollar (USD) **52**

D

Dashboard **23, 49**

date-driven analysis **16**

Demand Management license **35, 47**

Demand Mgmt: Submit Demand Mgmt Reports access grant **56**

document management

- features **20**

- potential impacts **57**

documentation

- features **33**

- Mercury IT Governance Center **33**

Documentation home page **33**

Documentum **20, 57**

Download Center (Mercury IT Governance)
33, 46

F

fields, preference 49
flags, Workbench Only 58

G

global business features 27

H

help, online 33
HTML documentation 33

I

Import Requests report 57
Import Users report 57
installation and upgrade information for release
6.0 46
Installation Guide, releases 5.0 and 5.5 46
integration features 23, 25
interface features 31
international business features 27
interoperability features 23
ITG Administrator security group 50
ITG Cost Manager security group 50
ITG Program Manager security group 50
ITG Project Manager security group 50
ITG Resource Manager security group 50

J

JCP (Java Community Process) services 23
JSP report architecture 57
JSR 168 (Java Specification Request)
specification 23

K

Kintana Service, registry entry for 58

KINTANA_SERVER_NAME parameter 58

L

licenses
configuration 48
Demand Management 47
Portfolio Management 47
power in release 5.5 47
Program Management 47
Project Management 47
standard in release 5.5 47
Time Management 47
user administration 48
licensing
features 35
potential impacts 47, 55
logging enhancements 39

M

Manage FX Rates access grant 50
Manage Regions access grant 50
Matrixed Team field 51
Mercury IT Governance Center
Documentation 33
Mercury IT Governance Download Center 33,
46

N

notification template for reports, changes to 58
notification value, Send If Obsolete 58

O

online help 33
organization model 51

P

PDF documentation 33
Portfolio Management
license 35, 47

security enhancements 41

portfolio what-if scenarios 16

portlets

- adding and removing the columns of 50
- changing the title of 49
- controlling results in maximized 49
- controlling the number of columns in 50
- controlling the width of 49

power licenses in release 5.5 47

preference fields, restoring the defaults of 49

product documentation features 33

Product Scope field 56

Program Management

- increased integration with Project Management 25
- license 35, 47

Project Cost Breakdown report 57

Project Cost Details report 57

Project Management

- conversion of functions to HTML 26
- increased integration with Program Management 25
- license 35, 47

Project Mgmt: Submit Project Mgmt Reports access grant 56

R

region 27

regional calendars 27, 52

- Spain 28
- support for 27
- United States 27, 52

Regional Calendars menu 27

registry entry for Kintana Service 58

related documents 13

release 6.0 (Mercury IT Governance Center), overview of key features in 13

Release Notes 46

report categorization 55

Report Category validation 56

Report Type: Synchronize Meta Layer window 56

reports

- categorization of 55
- enhanced usability of 37
- required license for 55
- upgrade impacts to 55

Reports menu in the standard interface 37

request search enhancements 42

resource model 51

resource search enhancements 18

Restore Default button 49

S

search enhancements 18, 42

security enhancements in Portfolio Management 41

security groups

- access grants assigned to 50
- ITG Administrator 50
- ITG Cost Manager 50
- ITG Program Manager 50
- ITG Project Manager 50
- ITG Resource Manager 50

Send If Obsolete notification value 58

skill rates 53

SOP 98-1 monitoring and enforcement 40, 53

standard licenses in release 5.5 47

Synchronize Meta Layer window 56

System Administration Guide and Reference 46

system base currency 52

System Requirements and Compatibility Matrix 46

System: Submit Reports access grant 56

T

ties between actuals 53

Time Management

- enhancements 41
- license 35, 47

Time Mgmt: Submit Time Mgmt Reports
access grant **56**
Time Sheet Details report **57**
time sheet policies **54**
Time Sheet Summary report **57**
time tracking **53**
TMG - Actual Time Summary report **57**
TMG - Actual Time/Cost Summary report **57**
TMG - Time Sheet Details report **57**
TMG - Time Sheet Summary report **57**
TMG - Work Allocation Details report **57**

U

United States dollar (USD) currency **52**
United States regional calendar **52**
Unspecified organization unit **51**
upgrade and installation information for release
6.0 **46**
Upgrade Guide, releases 5.0 and 5.5 **46**
usability features **31**
user administration license **35, 48**
User Detail report **57**

V

validation, Report Category **56**
View FX Rates access grant **50**
View Regions access grant **50**

W

what-if
 analysis **54**
 scenarios **16**
Work Allocation Details report **57**
Workbench Only flag **58**