Mercury™ IT Governance Center

Configuring Program Management

Version 5.5.0

MERCURY INTERACTIVE

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Chapter 1 Introduction

Mercury Program Management provides organizations with a single location from which Program Managers can initiate, operate, and manage their portfolio of programs and projects.

Organizations implement 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, Program Management provides a full project lifecycle 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.

About This Document

This guide provides instructions for configuring Program Management to enable the successful management of Programs on your company. This can include creating and modifying Request Types and Workflows as well as enabling user access to Program Management templates and menus.

Note

This document assumes that you understand the concepts and configuration techniques outlined in *Configuring a Request Resolution System*. See that document for additional details on configuring the basic Program Management entities, such as Workflows, Request Types and Validations.

Each chapter covers a particular topic:

Getting Started With Program Management	Introduces information necessary to enable Program Management.
Key Concepts	Defines the key concepts and definitions used when configuring Program Management.
Configuring Program Management Overview	Provides an overview of how to set up Program Management.
Gathering Requirements	Describes the information that will be needed before configuration of Program Management can begin.
Configuring Program Management Request Types and Workflows	Details how to set up Request Types and Workflows for use in Program Management.
Enabling User Access	Explains how to grant users access to Program Management features.
Customizing Menus and Templates	Describes how to customize menus and templates in the Mercury ITG Dashboard.

Intended Audience

The intended audience for this document include:

- Business or technical users who configure and maintain processes related to Program Management
- Users responsible for Request Type and Workflow configuration

Document Conventions

Table 1-1 lists the types of conventions used in this document.

Table 1-1. Document conventions

Convention	Description	Example
Button, menu, tabs	Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold.	**Apply** button
Fields, Windows, Pages	Names of windows, fields, and pages are shown as displayed.	New Request window
`Code`	Code input and output are shown as displayed.	`CauchoConfigFile` `C:/`*`ITG_Home`*`/conf/resin.conf`
Link	Linked URLs, filenames, and cross references are shown as blue italicized text.	*www.merc-int.com*
Variable	Variables are shown as italicized text.	*ITG_Home*/bin directory
Note	Used to identify note boxes that contain additional information.	Note
Caution	Used to identify caution boxes that contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data.	Caution
Example	Used to identify example boxes that contain examples of related procedure.	Example

Additional Resources

Mercury Interactive provides the following additional resources to help you successfully configure Mercury IT Governance (ITG) Center:

- *Related Documentation*
- *Customer Support*
- *Education Services*

Related Documentation

The Library includes additional documents related to the topics discussed in this guide. Access the Library through the Mercury ITG Center online help.

Processing Requests (Demand Management)	This document explains how to process Requests using Demand Management.
Installation Guide	This document describes the requirements and procedures for installing and configuring Mercury ITG Center.
Security Model Guide and Reference	This document presents an overview of the data security model and provides instructions for controlling access to different entities.
Configuring a Request Resolution System	This document provides instructions for configuring a Request resolution system. This includes requirements gathering, modeling your processes in a Workflow, defining a Request Type to be integrated with the Workflow, and rolling out this system to your users.
Configuring the Dashboard	This document provides instructions for configuring custom Portlets, maintaining standard and custom Portlets, and setting a Default Dashboard for all users.

Reports Guide and Reference	This document provides details for running reports.
Customizing the Standard Interface	This document provides details for customizing the standard interface, including the directory structure and methods of customization for changing the presentation of the standard interface.
Managing Your Programs (Program Management)	This document provides instructions for using Program Management Office to enable the successful management of Programs and Projects in your company.

Customer Support

Customer support and downloads for the Mercury ITG Center and additional product information can be accessed from the Mercury Interactive Support Web site at *http://support.mercuryinteractive.com*.

Education Services

Mercury Interactive provides a complete training curriculum to help you achieve optimal results using the Mercury IT Governance Center. For more information, visit the Education Services Web site at *http://www.merc-training.com/main/ITG*.

Chapter 2
Getting Started With Program Management

This chapter provides instructions for enabling Mercury Program Management.

The following topics are covered:

- *Enabling Program Management*
- *Rebuilding Statistics for the Cost-Based Optimizer*
- *New server.conf Parameters*

Enabling Program Management

Program Management is delivered with a standard installation of the Mercury ITG Center, but is not enabled by default. A Program Management license is required to use Program Management.

Rebuilding Statistics for the Cost-Based Optimizer

To improve the performance of the Mercury ITG instance, the installation will rebuild statistics for the cost-based optimizer for versions 8.1.6 and higher. In order to do this, the following privileges must be granted to the Mercury ITG schema as SYS (or on 9i, SYSTEM as sysdba).

```
grant select on v_$parameter to Mercury_ITG_Schema
grant execute on dbms_stats to Mercury_ITG_Schema
```

If the privileges are not granted, the performance of Program Management will be adversely affected.

New server.conf Parameters

Program Management introduces two new parameters to the server.conf file. Both parameters relate to the calculation of Program Summary Condition Indicators:

- **ENABLE_PROGRAM_SUMMARY_CONDITION_ENGINE** — (True/False) Turns the calculation of Program Summary Condition Indicators on or off. Should always be left on. Default value: True.
- **PROGRAM_SUMMARY_CONDITION_INTERVAL** — (Numerical values, in seconds) Sets the interval for the calculation of Program Summary Condition Indicators. Default value: 3600.

These parameters are inserted into the server.conf file and set to their default values automatically during the install process. To modify these parameters, run kConfig.sh as you would normally to edit the server.conf file.

Chapter 3
Key Concepts

This chapter defines the common concepts and terms related to configuring Program Management. Knowledge of these terms will help you gain a more thorough understanding of Program Management usage and configuration techniques.

The following topics are discussed:

- *Program*
- *Program Management*
- *Business Objective*
- *Issue*
- *Scope Change*
- *Risk*
- *Resource Request*
- *Field Group*
- *Dashboard Template*
- *Menu Security*

Program

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.

Example

A Program can be created to oversee the upgrade of Company A's Customer Service computer system for better integration with the Sales force. Projects are created by the Customer Service, Sales, and IT managers. Each Resource handles their own aspect of the work, and are linked and monitored by the Program. At the same time, Risks and Scope Changes submitted against the Program are tracked and followed up on.

Program Management

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

Business Objective

Business Objectives are a set of business goals that can be prioritized and tied to Programs. Business Objectives can be created, modified, and deleted independently of Programs. Business Objectives that have already been linked to Programs cannot be deleted.

Example

Company A creates a Business Objective, "Reduce order to delivery time." This Objective is assigned a priority and associated with the Program created to upgrade Company A's Customer Service system.

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.

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.

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.

Risk

Risks supply a way to log and resolve risks that threaten 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.

Example

Company A's Program Manager configures the Customer Service upgrade Program to show a red indicator if more than two Risks with Impact Level 1 and Probability High are created.

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.

Field Group

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 ITG 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 Demand Management features such as scheduling and analyzing Requests.

For Program Management, each Program Management Request Type's Request Header Type must be linked to the desired Field Group.

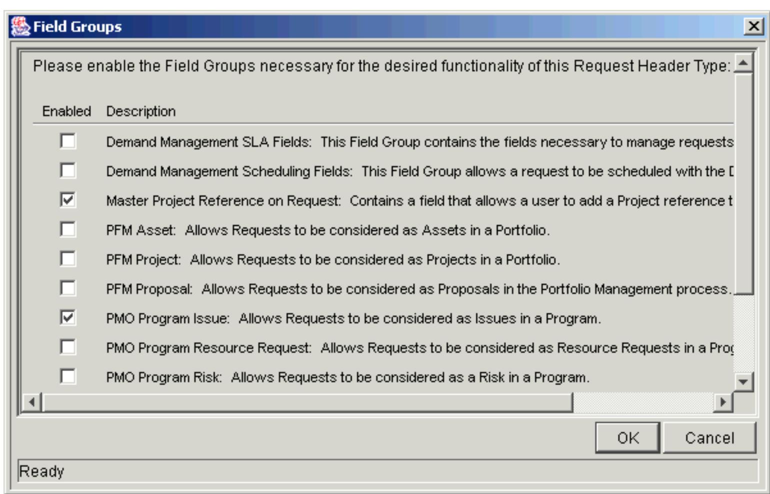


Figure 3-1 Field Groups Window

Dashboard Template

Users can import templates into their Mercury ITG Dashboard. These templates are added as a new page (tab) on the Dashboard. Each template can consist of one or more Dashboard pages. Once imported, you can personalize the pages to suit a specific business need, such as, add, delete or personalize Portlets.

Advance users can modify templates or create custom templates to be imported. For more information on working with templates, see *Customizing the Standard Interface*.

Menu Security

Each user must have a Program Management Standard License to access the Program Management menus. Additionally, users must be given the following additional Access Grant to be able to access the Program Manager menus:

- Program Mgmt: Manage Programs
- Program Mgmt: Edit Programs
- Program Mgmt: View Programs

The Program Management menus are defined XML files. Advanced users can customize these menus to provide alternate navigation, additional menu items, and alternate menu security.

Chapter 4 Configuring Program Management Overview

This chapter provides an overview of the process used to configure Mercury Program Management to track and manage Programs in your organization. The following summarizes each phase of configuration. Additional details for configuration are included in the referenced chapters.

To configure Program Management:

1. Gather requirements for your Program Management implementation.

   This includes determining which Request Types and Workflows will be used. See *"Gathering Requirements"* on page 17 for details.

2. Create the Program Management Request Types.

   This includes configuring Request Types and 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.

3. Configure Workflows for Program-related Request tracking and management.

   See *"Configuring Program Management Request Types and Workflows"* on page 19 for details.

4. Enable user access to menus and templates.

   This includes configuring User accounts and Security Groups to control who can access certain Program Management functionality. See *"Enabling User Access"* on page 25 for details.

Chapter 5 Gathering Requirements

The first step in configuring Program Management is to gather Program requirements. This chapter describes the information required to configure Mercury Program Management.

In order to properly configure and enable Program Management, you must determine the Program-related Request Types to be used. Program Management contains pre-configured Request Types and Workflows for all Program Management entities:

- Program Requests
- Issues
- Resource Requests
- Risks
- Scope Changes

If these pre-configured Request Types and Workflows are satisfactory, no further requirements gathering is necessary, and you can begin using Program Management once you have associated the proper Security Groups with each Request Type and Workflow.

If the provided Request Types and Workflows are unsuitable for your organization's needs, you can implement any of the following options:

- Copy and modify the provided Request Types and Workflows to match your business requirements. The Request Types and Workflows should be associated with each other through their respective **Workflows** and **Request Types** tabs.
- 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. The Request Types and Workflows should be associated with each other through their

respective **Workflows** and **Request Types** tabs. See *"Configuring Program Management Request Types and Workflows"* on page 19 for details.

- Create new Request Types and Workflows for Program Management. This includes creating and configuring new Request Types and their associated Request Header Types to include the desired Program Management Field Group. The Request Types and Workflows should be associated with each other through their respective **Workflows** and **Request Types** tabs. See *"Configuring Program Management Request Types and Workflows"* on page 19 for details.

Chapter 6 Configuring Program Management Request Types and Workflows

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. This chapter provides instructions for creating Program-related Request Types and enabling Workflows for use with Program Management.

This chapter covers the following topics:

Overview: Creating a Program-Related Request Type

Program-related 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-related Request Type:

1. Add the Program Management Field Groups to the Request Type.

   The Program Management Field Groups are listed in the table below:

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

2. Add the associated Workflow to the Request Type's **Workflows** tab.
3. Add the Request Type to its associated Workflow's **Request Types** tab.

Note

A fresh Mercury Program Management installation consists of the following Program-related Request Types:

- PMO - Issue
- PMO - Program Request
- PMO - Resource Request
- PMO - Risk
- PMO - Scope Change

Adding the Field Groups to a Request Type

This procedure details how to add the Program Management Field Groups to a Request Type.

Note

The Master Project Reference on Request Field Group should be added to all Program-related Request Types except the Program Request.

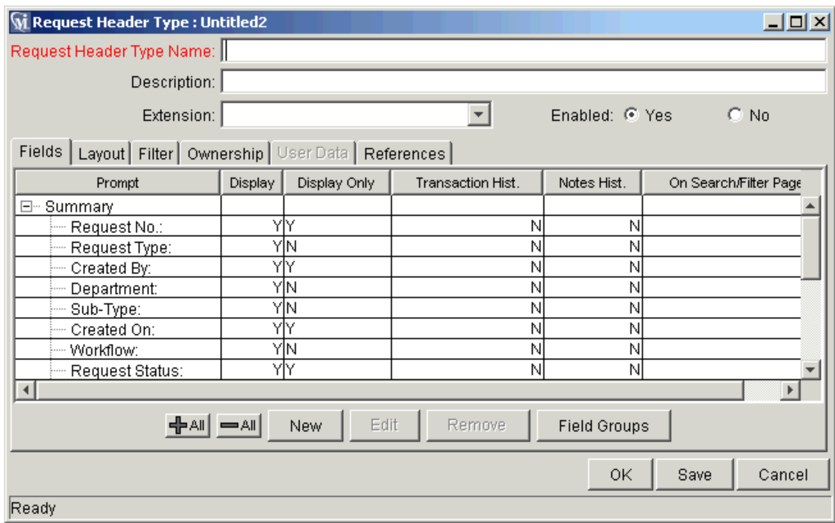
To add a Field Group:

1. From the Workbench, open or create a Request Type.

2. Open the Request Type window.

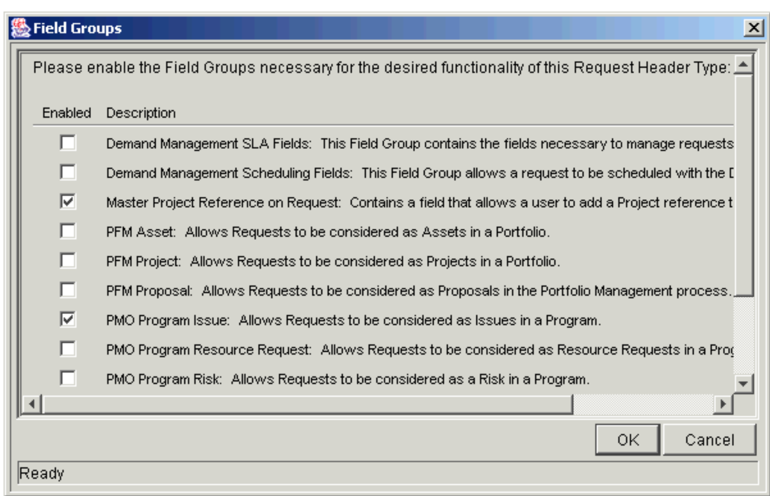
3. Click **Open** under the Request Header Type field.

   The specified Request Header Type window opens.



4. Click **Field Groups**.

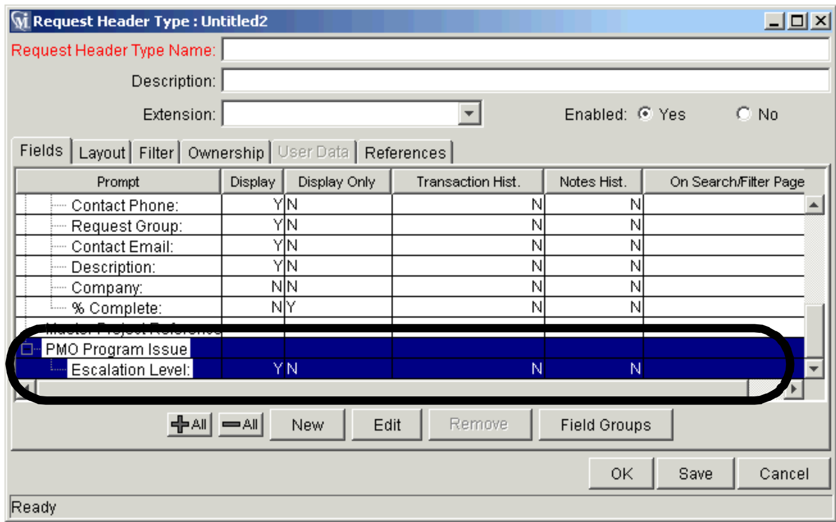
   The Field Groups window opens.



5. Select the Program Management Field Groups to attach to your Request Header Type.

6. Click **OK**.

   The selected Field Groups appear on the Request Header Type.



7. Save the Request Header Type and the Request Type.

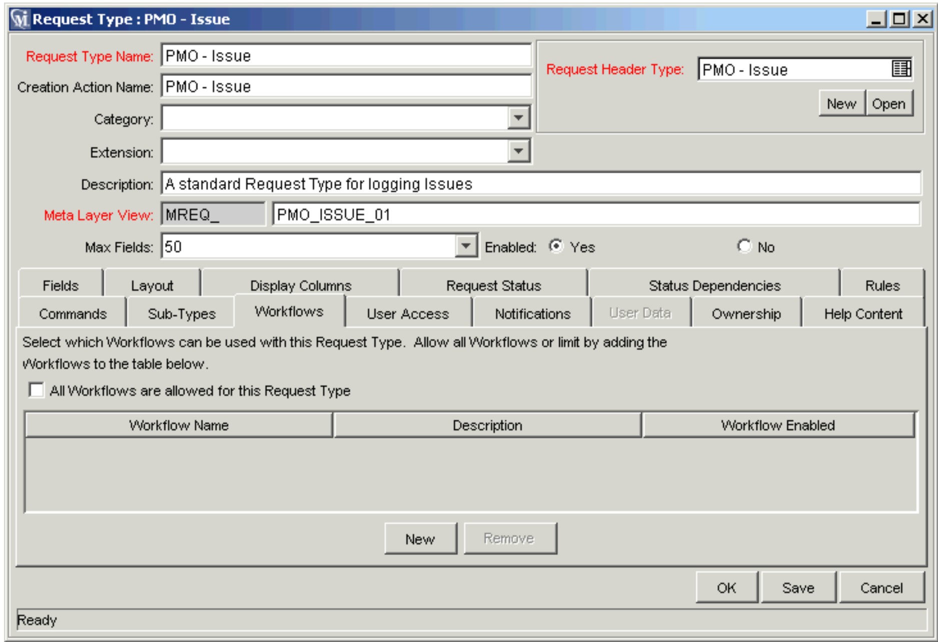
Specifying Program Management Workflows for Request Types

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

To associate a Request Type with a Workflow:

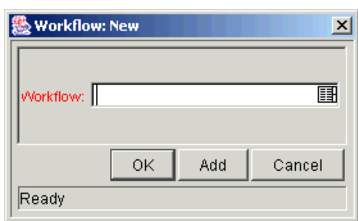
1. Open the Request Type.

2. Click the **Workflows** tab.



3. Click **New**.

   The Workflow: New window opens.



4. From the Workflow field, select a Workflow and click **OK**.

5. Save the Request Type.

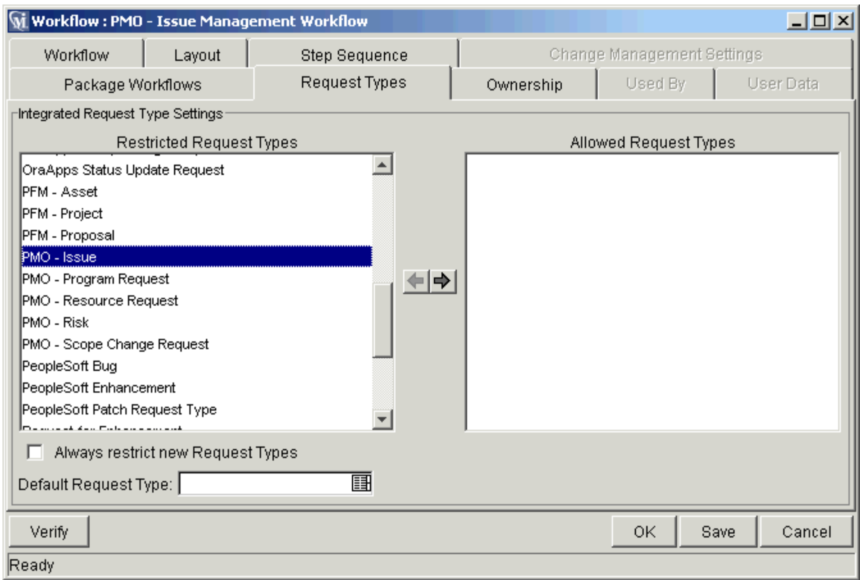
Specifying Program Management Request Types for Workflows

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 Workflow.

2. Click the **Request Types** tab.



3. Select the desired Request Type from the Restricted Request Types list and move it into the Allowed Request Types list by clicking the right arrow ().

4. Save the Workflow.

Chapter 7
Enabling User Access

Mercury IT Governance Center provides licenses, Security Groups and Access Grants to access all of the features of Mercury Program Management. This chapter provides instructions for controlling access to specific Program Management features.

This chapter covers the following topics:

- *Enabling General Access*
- *Controlling Configuration Access*

Note

You can also use standard data and process security techniques as outlined in *Security Model Guide and Reference* to control access to Program Management features.

Enabling General Access

Each user must have a Program Management Standard License to access Program Management features. Additionally, users must be given the Program Mgmt: Manage Programs Access Grant to be able to access the Program Manager menu.

Controlling Configuration Access

Program Management allows you to set security around the Program Management configuration. You can establish configuration security around all of the configuration entities. This includes such activities as controlling:

- Who can change the Workflow.
- Who can change Request Types.
- Who can change the User and Security Group definitions.

Note

You must have the correct Access Grants to modify User accounts or Security Groups. See the application administrator at your site to make changes to either of these entities.

See *Security Model Guide and Reference* for details on controlling who can alter your configurations.

Appendix A
Customizing Menus and Templates

Mercury Program Management templates and menus are delivered as xml files on the Mercury IT Governance file system. Users can customize these templates and menus by creating new files or altering existing xml files. See *Customizing the Standard Interface* for a description of the main elements of the template and menu files and instructions on how to modify them.

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