Mercury™ IT Governance Center

Managing Your Programs (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 describes how to use Program Management. Each chapter covers a specific topic on using Program Management to create and manage Programs and Program entities:

Key Concepts	Defines key concepts and terms used in Program Management.
Creating Program Management Entities	Explains how to create Business Objectives and Programs.
Managing Programs	Describes how to manage existing Programs, log Program-related Requests, and use Program-related Reports.
User Licensing and Access	Explains the Program Management license and Access Grants for Programs.
Program Management and the Mercury ITG Dashboard	Defines the Program Management Portlets.

Intended Audience

The intended audience for this document include:

- Users who create and manage Programs
- Managers who create and manage Projects, which can become part of Programs
- Users who create Program-related Requests
- Users who participate in Programs by being part of a linked Project or part of the resolution process for a Program-related Request
- Business users responsible for reporting on Programs
- Users who create and monitor Programs without necessarily being involved in day-to-day Program Management

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 use Mercury 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.
Managing Your Projects (Project Management)	This document explains how to work with Projects using Project Management.
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.
Managing Your Resources (Resource Management)	This document provides instructions for managing your Resources. This includes modeling your Organizations, setting up Resource Categories and Calendars, creating Staffing Profiles and Resource Pools, and visualizing Resource load and capacity across the system.
Reports Guide and Reference	This document provides details for running reports.
Configuring Program Management	This document provides instructions for configuring Mercury ITG Center to enable the successful management of programs and projects in your company.

Customer Support

Customer support and downloads for 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 Mercury ITG Center. For more information, visit the Education Services Web site at *http://www.merc-training.com/main/ITG*.

Chapter 2 Key Concepts

This chapter defines the common concepts and terms used in Mercury Program Management. An understanding of these concepts and terms is necessary when using Program Management.

This chapter covers the following topics:

- *Program*
- *Program Management*
- *Business Objective*
- *Issue*
- *Scope Change*
- *Risk*
- *Resource Request*
- *Dashboard*
- *Portlets*

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 attached 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
- Initiate Program Requests (by Stakeholders)

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.

Dashboard

Mercury ITG Dashboard consists of a set of configurable, role-based visual displays called Portlets that provide relevant summary information and highlight exception conditions. From these displays, users can drill down to any desired level of detail. The Dashboard displays the true status of initiatives and Requests, based on the current data. Current data is automatically captured as part of the work actually being performed.

The Dashboard is designed for use by participants throughout the Technology Chain. For example, developers can use the Dashboard to view all their own action items, and end-users can consult their own Dashboards to see the status of all the Requests they have submitted. Tabs in the Dashboard interface allow users to group Portlets according to their own needs.

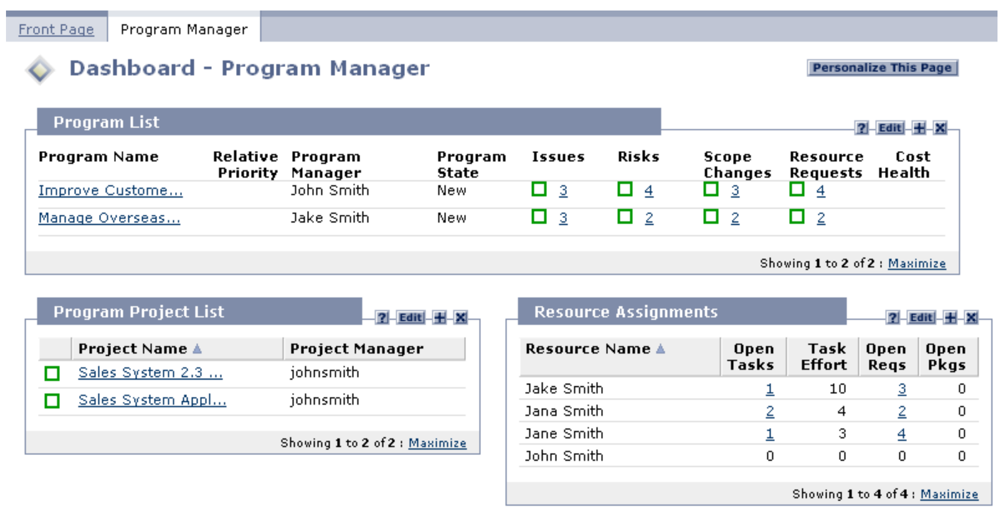


Figure 2-1 Mercury ITG Dashboard

Portlets

Portlets are configurable, role-based visual displays that provide relevant summary information of business data. Each user can select which Portlets they would like to display on their Dashboard. They can then personalize those Portlets to display only the information that is relevant to their Projects, Tasks, Packages, or Requests.

In addition to providing relevant information for higher visibility, Portlets also provide the user with the ability to drill down into the details of the Project, Task, Request or Package. This enables the user to access and update information from a single Web page.

Mercury ITG Center features a set of Portlets for each Mercury ITG product. These Portlets are designed to provide the most efficient and flexible access to business data. It is also possible for the application administrator to create custom Portlets to suit a particular business need.

Note

Portlets can only be added to a Dashboard which is associated with the products licensed at your site. For a full list of the available Portlets, see Using the Dashboard.

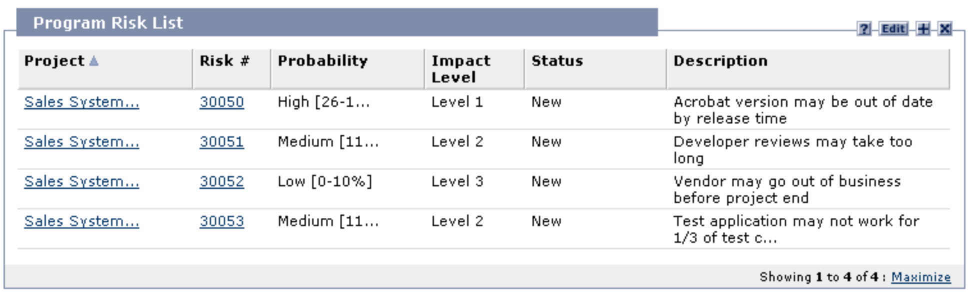


Figure 2-2 Portlet

Chapter 3 Creating Program Management Entities

This chapter describes how to create Business Objectives and Programs. Though not required in a Program, Business Objectives are typically created prior to creating Programs. This provides a means to capture your business goals as discrete entities that can be prioritized and tied to Programs.

This chapter covers the following topics:

- *Creating Business Objectives*
- *Creating Programs*

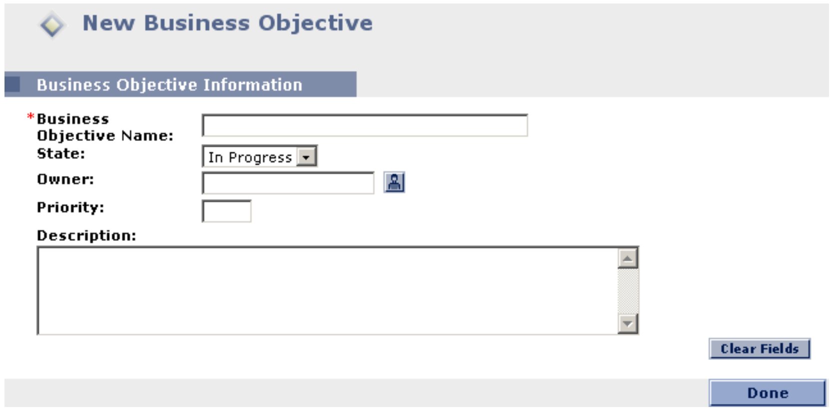
Creating Business Objectives

To create a Business Objective:

1. From the menu bar, select **PMO > Business Objectives > Create a Business Objective**.

   You can also click **Create New** in the Business Objectives page.

   The New Business Objective page opens.



2. Fill in all required fields and any optional fields.

3. Click **Done**.

The Business Objective has been created.

Creating Programs

The following sections discuss the processes involved in getting a Program started. Typical Program creation involves requesting a Program before creating one. Once the Program has been created, users can begin to capture Program-related issues. See the following sections for more detailed information:

- *Requesting a Program*
- *Creating a Program*

Requesting a Program

Typical business practice indicates that requesting a Program is a valid and necessary first step to take before actually creating one. This allows you to capture useful information, gather the necessary approvals, and notify the proper individuals before getting the Program started.

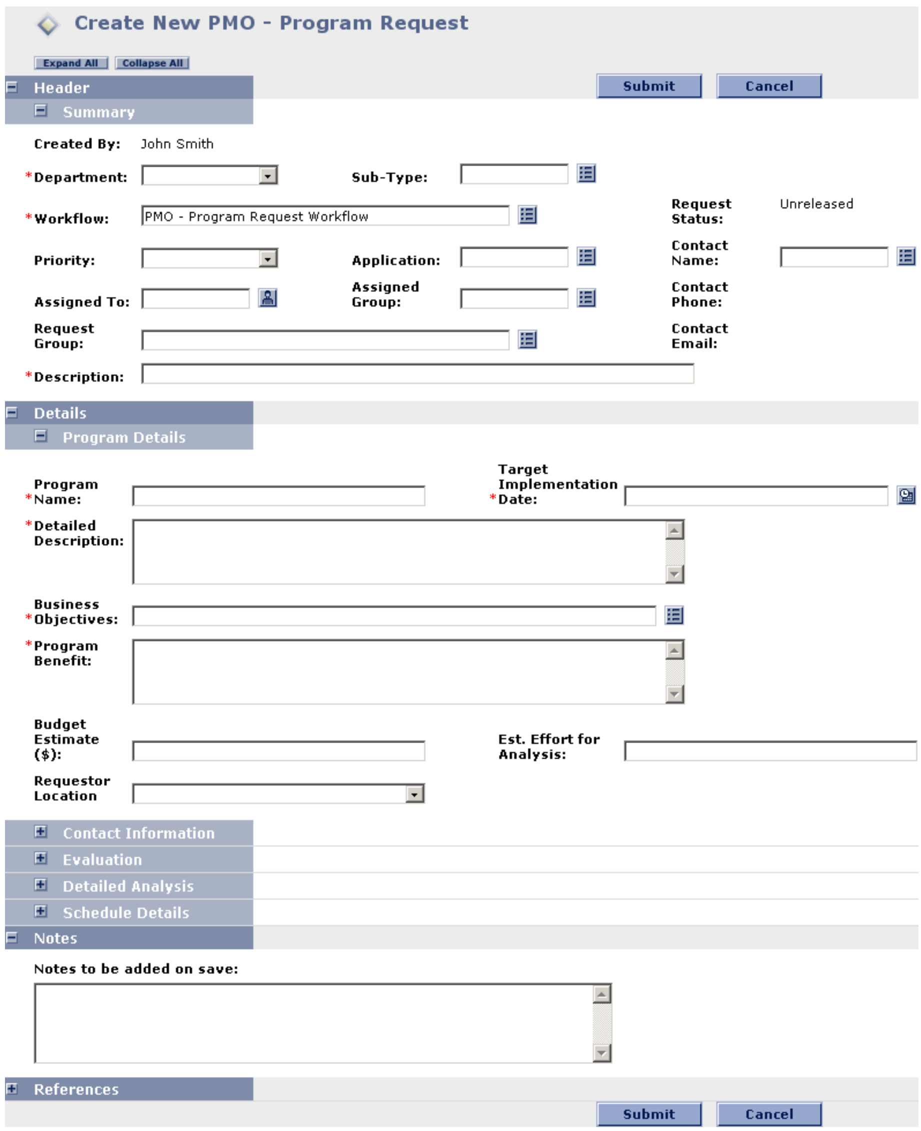
In order to take full advantage of the Program Management's capabilities, it is recommended that you use the pre-configured Program Request Type and associated Workflow to request a Program.

> **Note:** Your Mercury ITG application administrator can modify the Request Type and Workflow to suit your business needs.

To request a Program:

1. Log onto Program Management.
2. Select **Create > Initiative Request** from the navigation bar.

   The Request Creation page opens with the Program Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **Submit** to submit the Program Request.

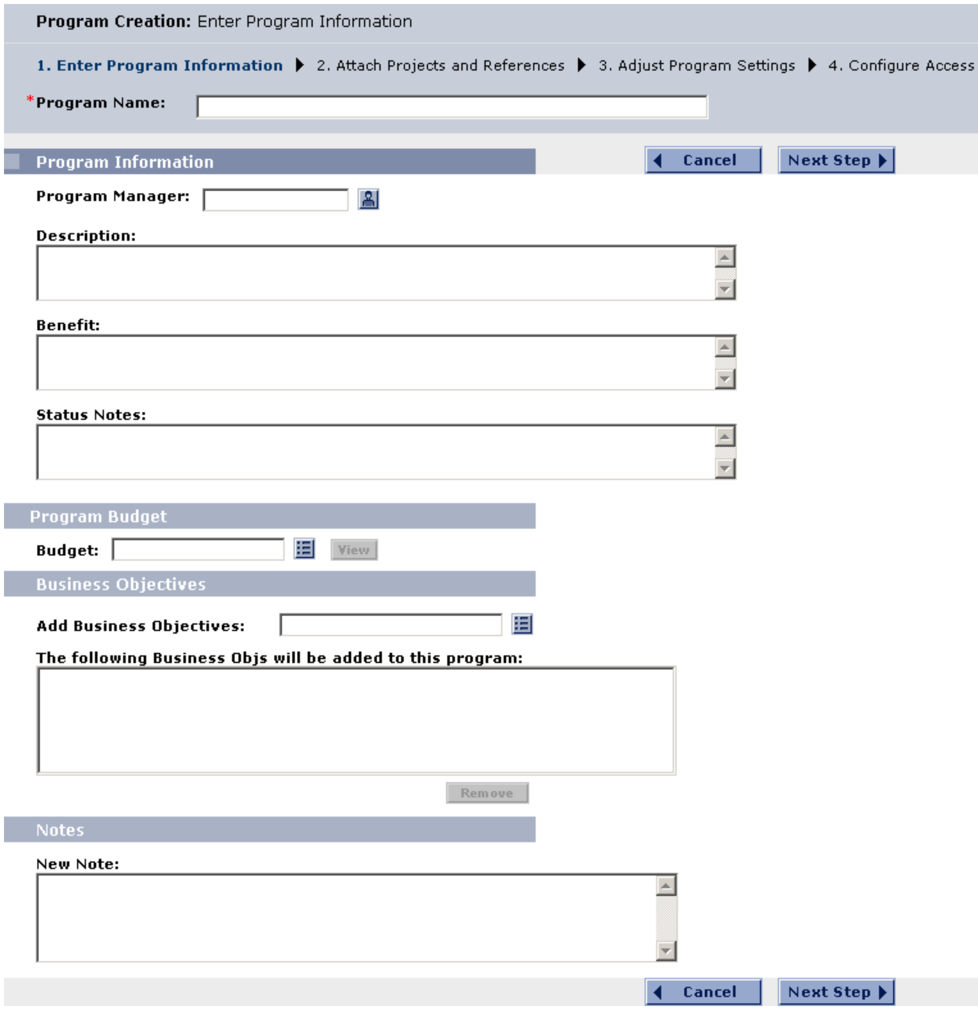
Creating a Program

After the Request for a Program has been approved, the Program itself can be created. This process involves entering Program-specific information along with associating Business Objectives, Projects, and References, as well as configuring Program Summary Condition Indicators.

To create a Program:

1. Select **Create > Program** or **PMO > Create a Program** from the navigation bar.

   The Enter Program Information page opens.



2. Fill in all required fields and any optional fields in the Program Information section.

3. Attach any related Business Objectives, Projects, and References to the Program, as well as configure the Program's Summary Condition Indicators.

   The following sections provide more detailed information on these aspects of creating a Program:

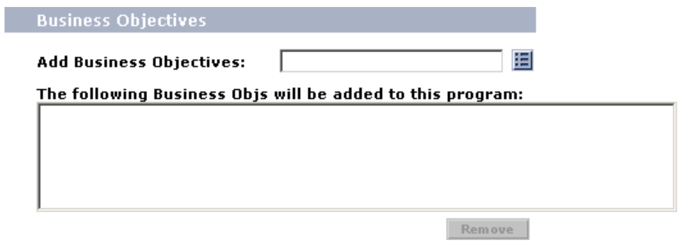
   - *Selecting Business Objectives*
   - *Adding Projects*
   - *Adding References*

- *Configuring Indicator Settings*
- *Configuring Program Access*

Selecting Business Objectives

To associate Business Objectives with a Program:

1. In the Enter Program Information page, scroll down to the Business Objectives section.

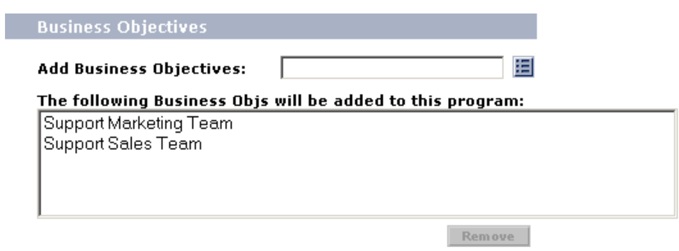


2. Select any Business Objectives you wish to attach to the Program from the Add Business Objectives field.

Note

Only Business Objectives in the **In Progress** state can be associated with a Program.

When the auto-complete window closes, the selected Business Objectives appear in the The following Business Objs will be added to this Program list on the Enter Program Information page. *The Business Objectives have not been added yet*.



Select a Business Objective and click **Remove** to remove any unwanted Business Objectives from the list.

3. Click **Next Step** to proceed to the next step in Program creation.

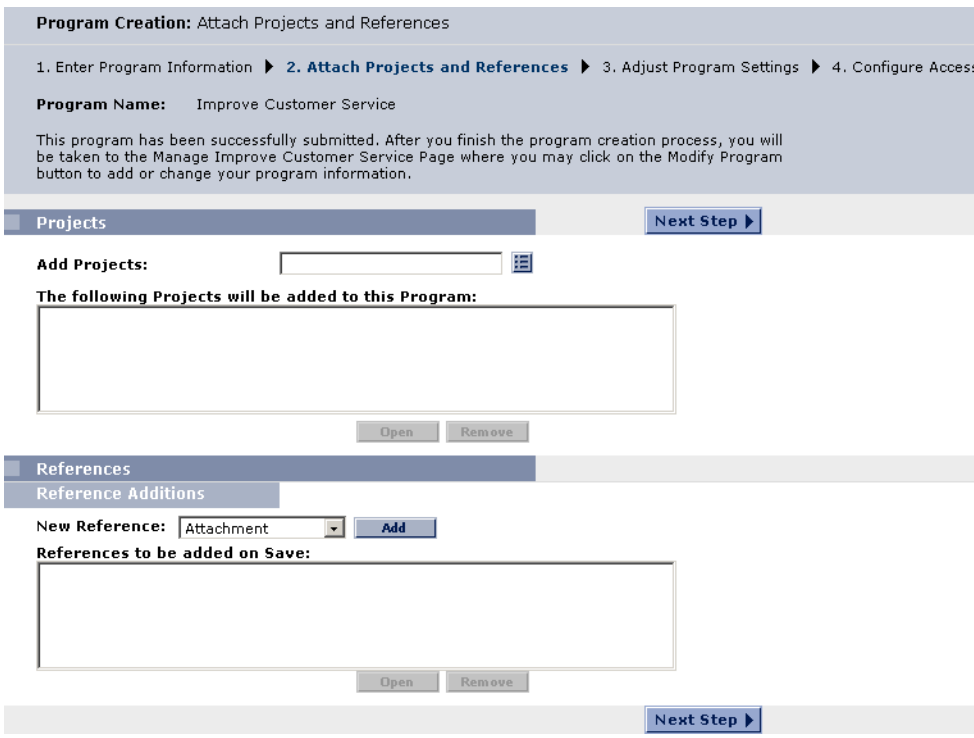
The Attach Projects and References page opens.

The Business Objectives have been added to the Program.

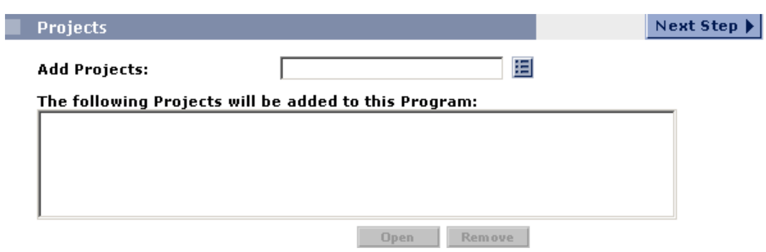
Adding Projects

To associate Projects with a Program:

1. You should have already completed the *Creating a Program* and *Selecting Business Objectives* steps, bringing you to the Attach Projects and References page.

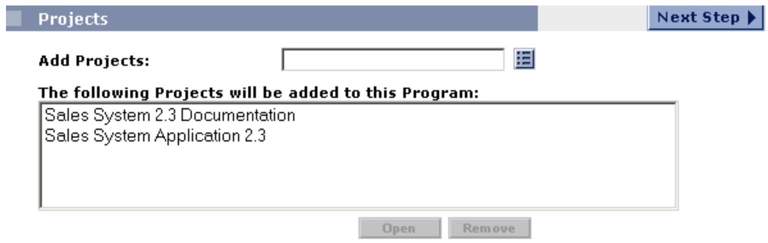


2. Scroll down to the Projects section.



3. Select any Projects you wish to attach to the Program from the Add Projects field.

When the auto-complete window closes, the selected Projects appear in the The following Projects will be added to this Program list on the Attach Projects and References page. *The Projects have not been added yet*.



Select a Project and click **Remove** to remove any unwanted Projects from the list.

4. Add any desired References to the Program (see *Adding References* for more detailed information) if you haven't done so already.

5. Click **Next Step** to proceed to the next step in Program creation.

   The Adjust Program Settings page opens.

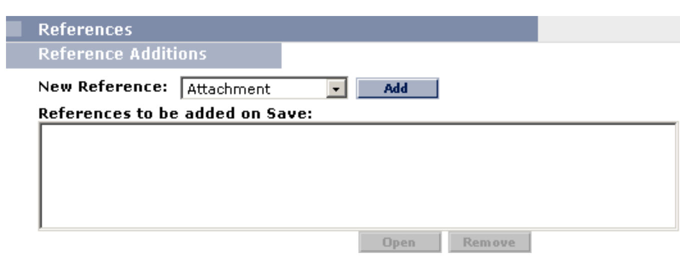
   The Projects (and References) have been added to the Program.

Adding References

The standard set of References (Attachments, Packages, Projects, Tasks, New Requests, Existing Requests, and URLs) can be added to a Program, with the standard set of Reference relationships. See any of the Mercury ITG User Guides for more information on References and Reference relationships.

To add References to a Program:

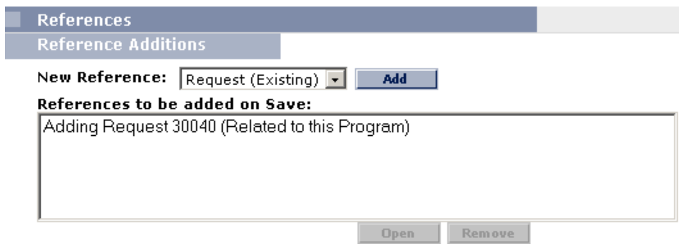
1. You should have already completed the *Creating a Program* and *Selecting Business Objectives* steps, bringing you to the Attach Projects and References page. Scroll down to the References section.



2. Select any References you wish to attach to the Program from the New References field.

3. Click **Add**.

   The selected References appear in the References to be added on Save list on the Attach Projects and References page. *The References have not been added yet*.



   Select a Reference and click **Remove** to remove any unwanted References from the list.

4. Add any desired Projects to the Program (see *Adding Projects* for more detailed information) if you haven't done so already.

5. Click **Next Step** to proceed to the next step in Program creation.

   The Adjust Program Settings page opens.

   The References (and Projects) have been added to the Program.

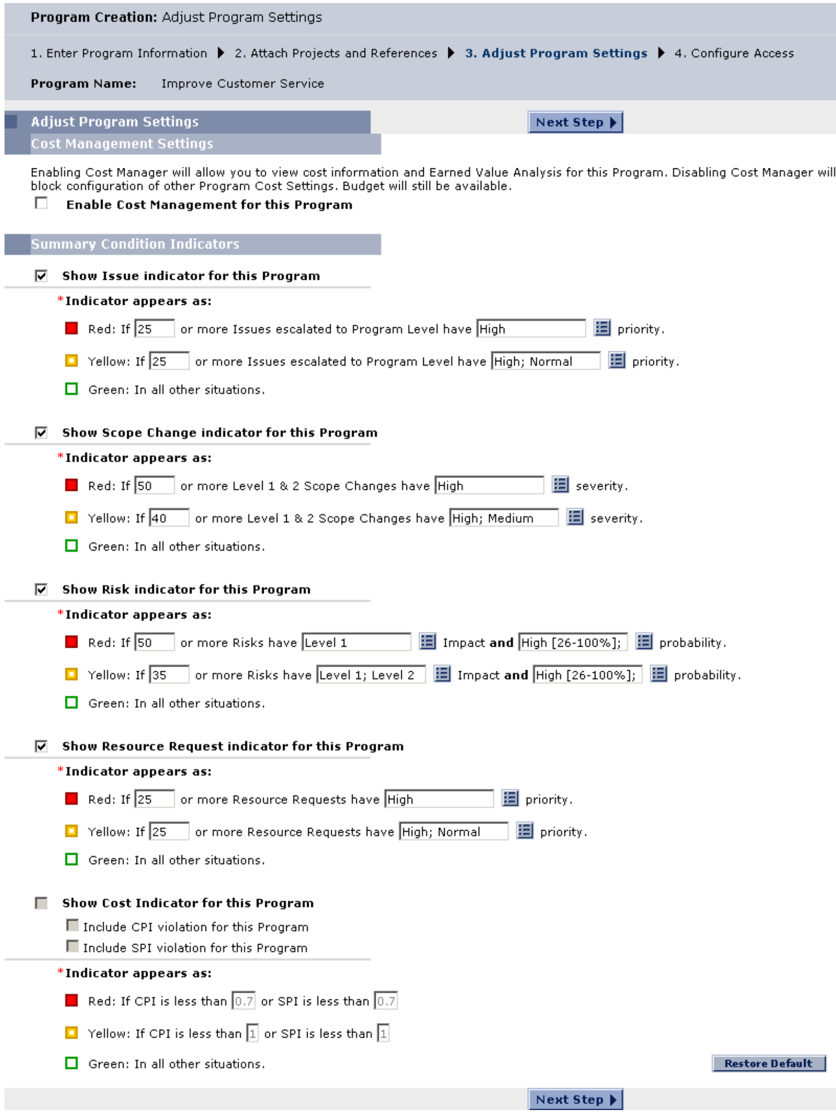
Configuring Indicator Settings

Summary Condition Indicators are a useful way to show the at-a-glance status of a Program's Issues, Scope Changes, Risks, and Resource Requests, as well as Cost data if Cost Management has been enabled for the Program. These Indicators appear as colored icons in the Program List Portlet and Manage Program page.

Each Program Management Request Type has its own Summary Condition Indicator, which can be configured independently of the others.

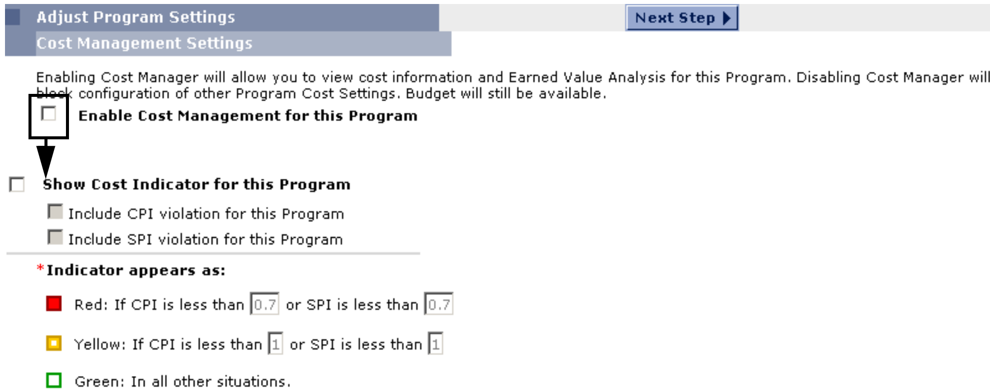
To configure Summary Condition Indicators for a Program:

1. You should have already completed the *Creating a Program*, *Selecting Business Objectives*, *Adding Projects*, and *Adding References* steps, bringing you to the Adjust Program Settings page.

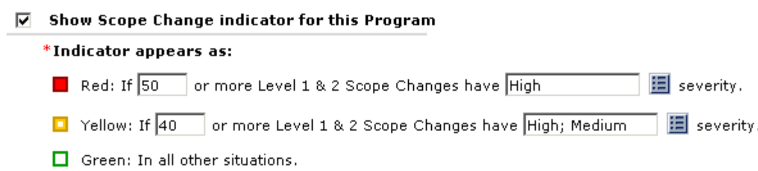


2. Decide whether to enable Cost Management for the Program by selecting the Enable Cost Management for this Program check box.

   Enabling Cost Management activates the Cost Indicator settings at the bottom of the page.



3. Activate the Summary Condition Indicator for the desired Program Management Request Type by selecting the Show (*Request Type*) indicator for this Program box.



4. Specify the triggering values for the Indicator to turn red by entering a number and Request field state in the appropriate fields.

5. Specify the triggering values for the Indicator to turn yellow by entering a number and Request field state in the appropriate fields.

   To restore the default values for each Indicator, click **Restore Defaults**.

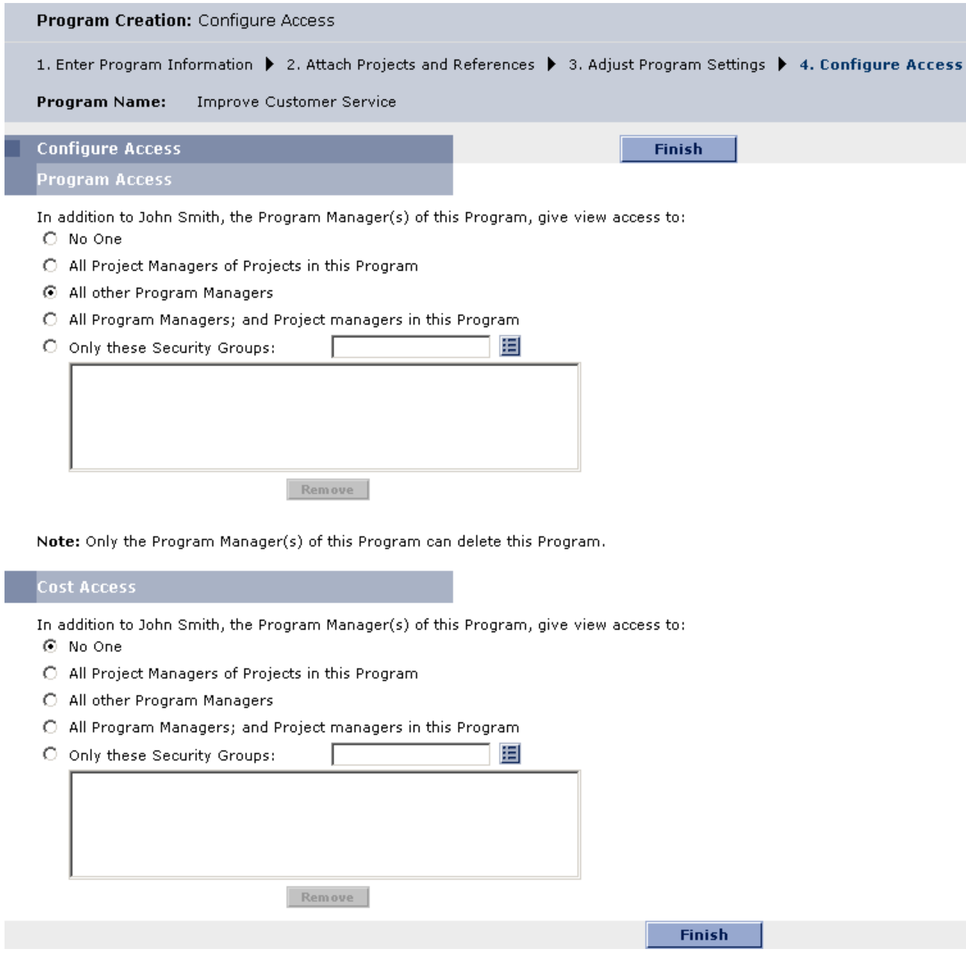
6. Click **Next Step** to proceed to the next step in Program creation. The Configure Access page opens.

Configuring Program Access

You can control which users can view the Program, as well as the users who can view the Program's Cost information independently. Access is configured on a per-Program basis.

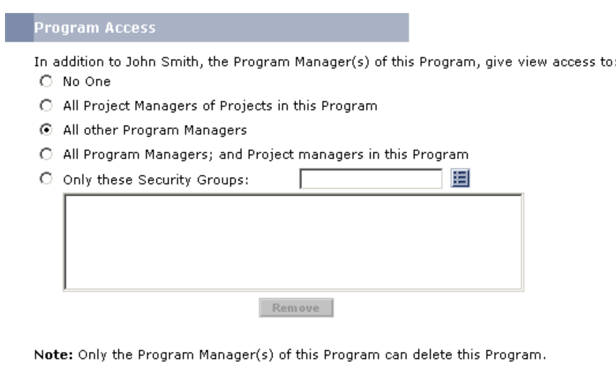
To configure access to the Program you are creating:

1. You should have already completed the *Creating a Program*, *Selecting Business Objectives*, *Adding Projects*, *Adding References*, and *Configuring Indicator Settings* steps, bringing you to the Configure Access page.



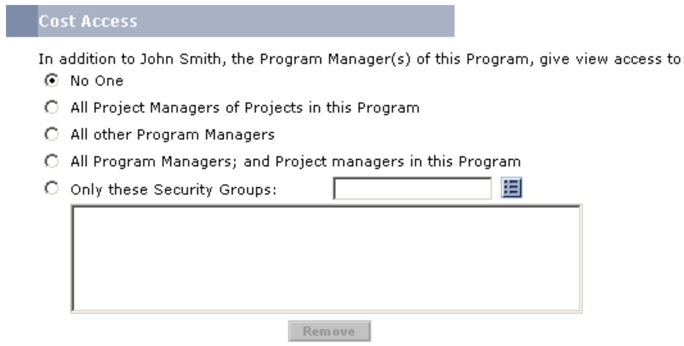
2. Select the set of users who can view the Program.

   To specify a list of Security Groups, use the Only these Security Groups multi-select auto-complete list.



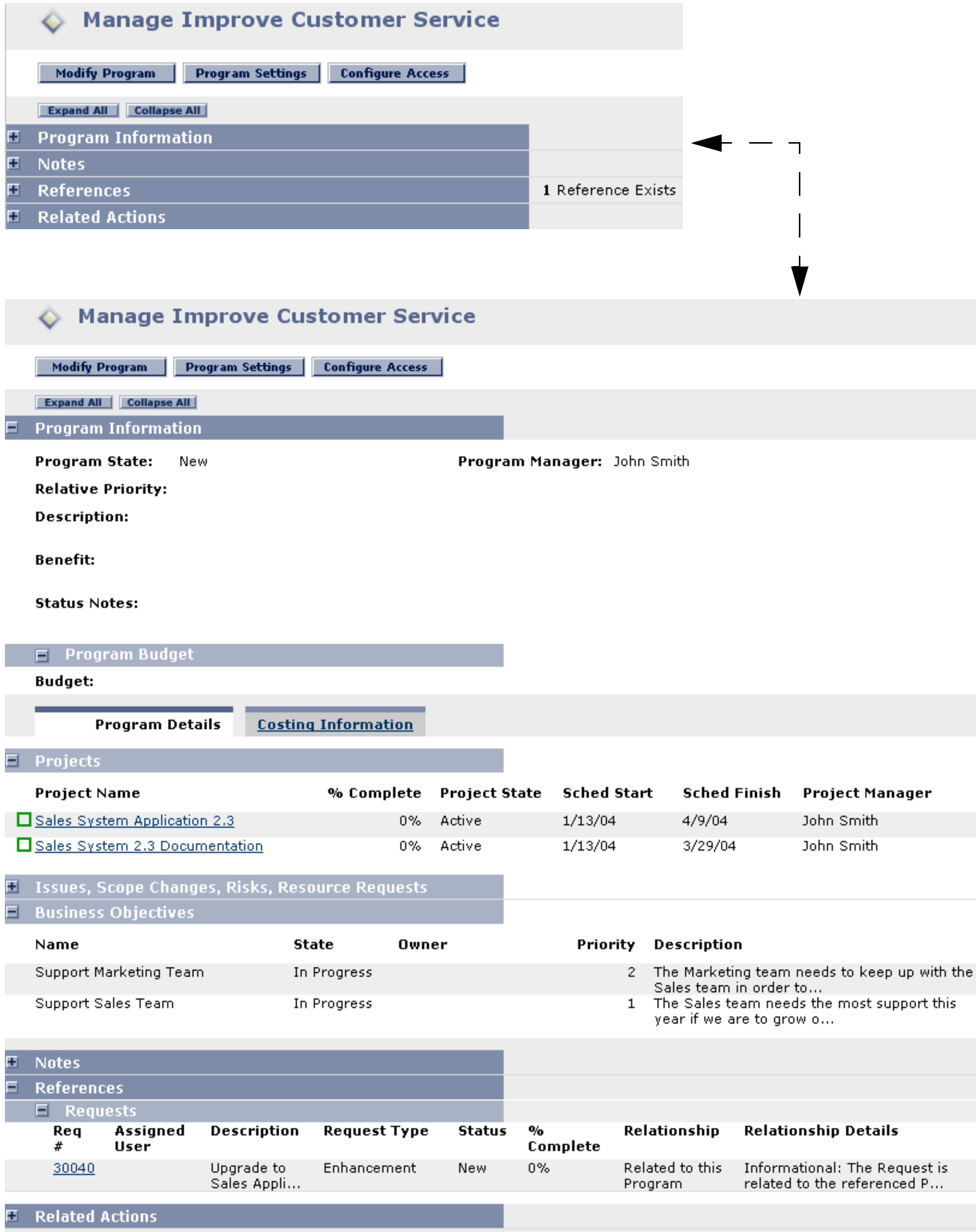
3. Select the set of users who can view the Program's Cost data.

To specify a list of Security Groups, use the Only these Security Groups multi-select auto-complete list.



4. Click **Finish**.

   The Manage Program page opens, displaying the Program you created.



Click the [+] buttons or **Expand All** to display more information in the Manage Program page.

Chapter 4 Managing Programs

This chapter describes how to manage existing Programs. During a Program's life cycle, many events can occur.

- Risks may develop.
- Program Project scope could change.
- Resources might be needed.
- Issues may arise.
- Associated Projects will finish, or might stall, or be canceled altogether.
- Business Objectives could change or become obsolete.
- Any References may close out or otherwise change.

This chapter covers the following topics related to managing Programs:

- *Creating Program Requests*
- *Modifying Business Objectives*
- *Working With Issues*
- *Working With Resource Requests*
- *Working With Risks*
- *Working With Scope Changes*

Creating Program Requests

Once a Program has been created, users can begin to capture and document Program-related items by submitting Issues, Resource Requests, Risks, and Scope Changes.

To submit a Program-related Request:

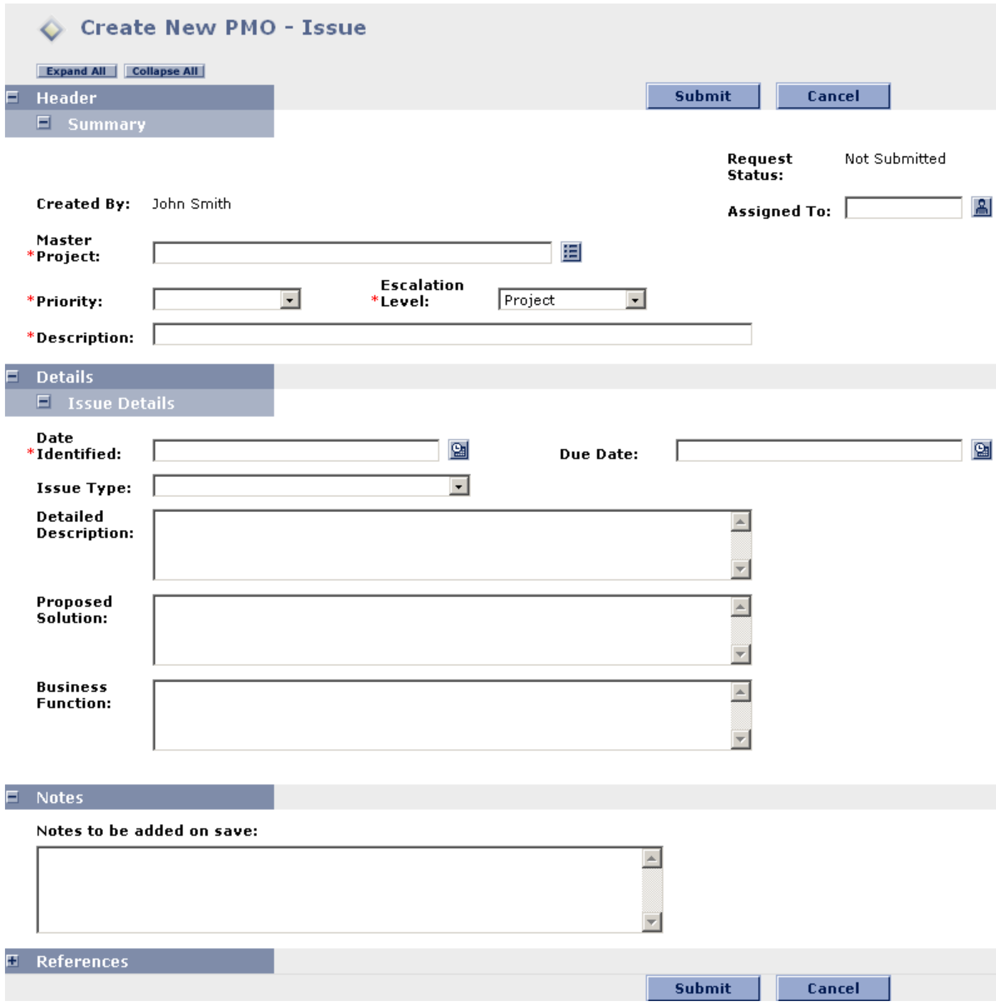
1. From the menu bar's **Create** menu group, select one of the following:

   - **Project Issue**
   - **Project Resource Request**
   - **Project Risk**
   - **Project Scope Change**

   Or from the **PMO** menu group, select one of the following:

   - **Issues > Submit a Project Issue**
   - **Resource Requests > Request a Project Resource**
   - **Risks > Submit a Project Risk**
   - **Scope Changes > Request a Project Scope Change**

   The Request Creation page opens, with the appropriate Request Type loaded.



2. Fill in all required fields and any optional fields.

3. Click **Submit** to submit the Request.

   The Issue, Resource Request, Risk, or Scope Change Request will begin moving along its pre-defined Workflow toward resolution.

Modifying Business Objectives

Business Objectives can be created, modified, and deleted independently of Programs, though Business Objectives that have already been linked to Programs cannot be deleted.

The following sections discuss Business Objectives in more detail:

- *Editing a Business Objective*
- *Deleting a Business Objective*

Note

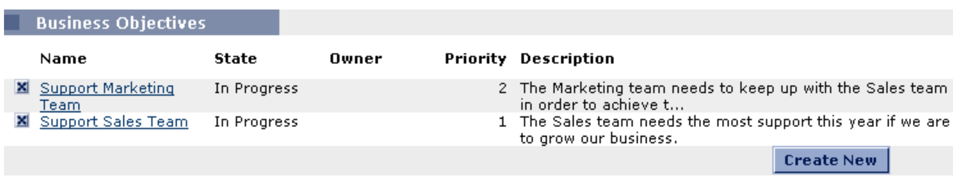
The Validation for the Business Objective State (PMO - Business Objective States) can be altered to suit your business needs. For more information on altering Validations, see Configuring a Request Resolution System.

Editing a Business Objective

To edit a Business Objective:

1. From the menu bar, select **PMO > Business Objectives > Manage Business Objectives**.

   The Business Objectives page opens.



2. Click the name of the Business Objective you wish to edit.

   The Modify Business Objective page opens.

3. Modify any desired fields and click **Done**.

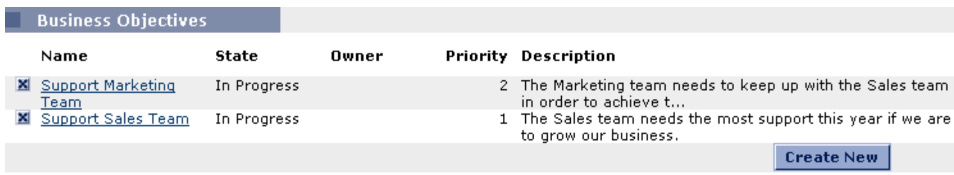
The changes to the Business Objective have been saved.

Deleting a Business Objective

To delete a Business Objective:

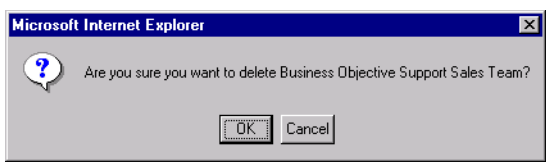
1. From the menu bar, select **PMO > Business Objectives > Manage Business Objectives**.

   The Business Objectives page opens.



2. Click the button next to the Business Objective you wish to delete.

   A dialog window appears asking you to confirm whether you want to delete the Business Objective.



3. Click **OK** to delete the Business Objective.

Note

You cannot delete a Business Objective that has been linked to a Program.

Working With Issues

Occasionally, Program-related concerns may surface that need to be dealt with. Issues introduce a framework for such concerns to be identified and resolved in the form of Demand Management Requests that can be tracked and reported on. The following sections discuss working with Issues in more detail:

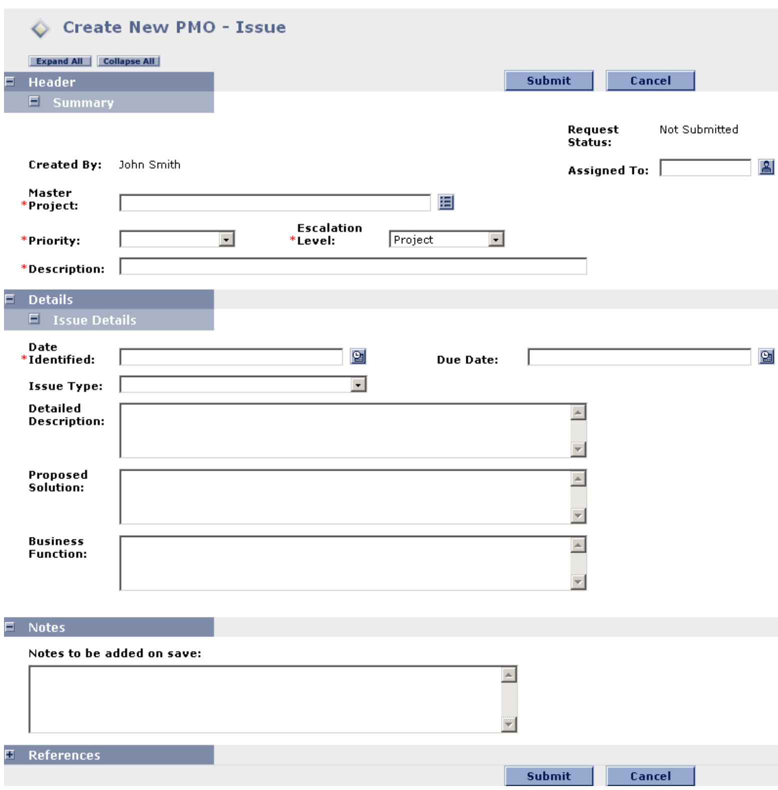
- *Submitting an Issue*
- *Managing Issues*

Submitting an Issue

To submit an Issue:

1. Select **Create > Project Issue** or **PMO > Issues > Submit a Project Issue** from the menu bar.

   The Request Creation page opens with the Issue Request Type loaded.



2. Fill in all required fields and any optional fields.

3. Click **Submit** to submit the Request.

   The Issue begins moving along its pre-defined Workflow toward resolution.

> **Note:** In order to show up in Program Management Portlets, the Request must be Referenced to a Project associated with a Program or attached as a Reference directly.

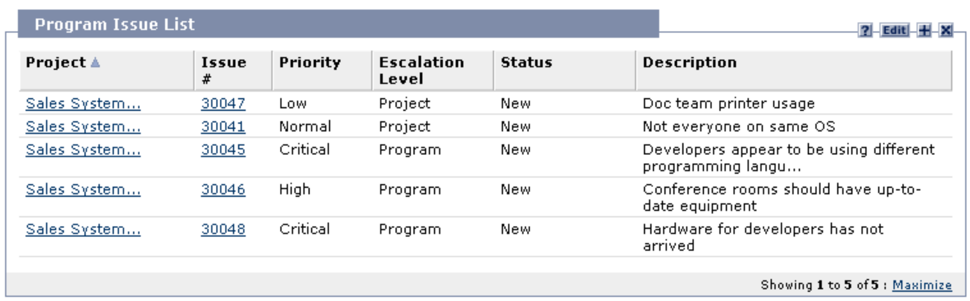
Managing Issues

There are two places to obtain a convenient overview of Issues for a Program:

- *Program Issue List Portlet*
- *Manage Program Page: Issues*

Program Issue List Portlet

The Program Issue List Portlet lists all the Issues associated with a selected Program.



Program Issue List

Project	Issue #	Priority	Escalation Level	Status	Description
Sales System...	30047	Low	Project	New	Doc team printer usage
Sales System...	30041	Normal	Project	New	Not everyone on same OS
Sales System...	30045	Critical	Program	New	Developers appear to be using different programming langu...
Sales System...	30046	High	Program	New	Conference rooms should have up-to-date equipment
Sales System...	30048	Critical	Program	New	Hardware for developers has not arrived

Showing 1 to 5 of 5 : Maximize

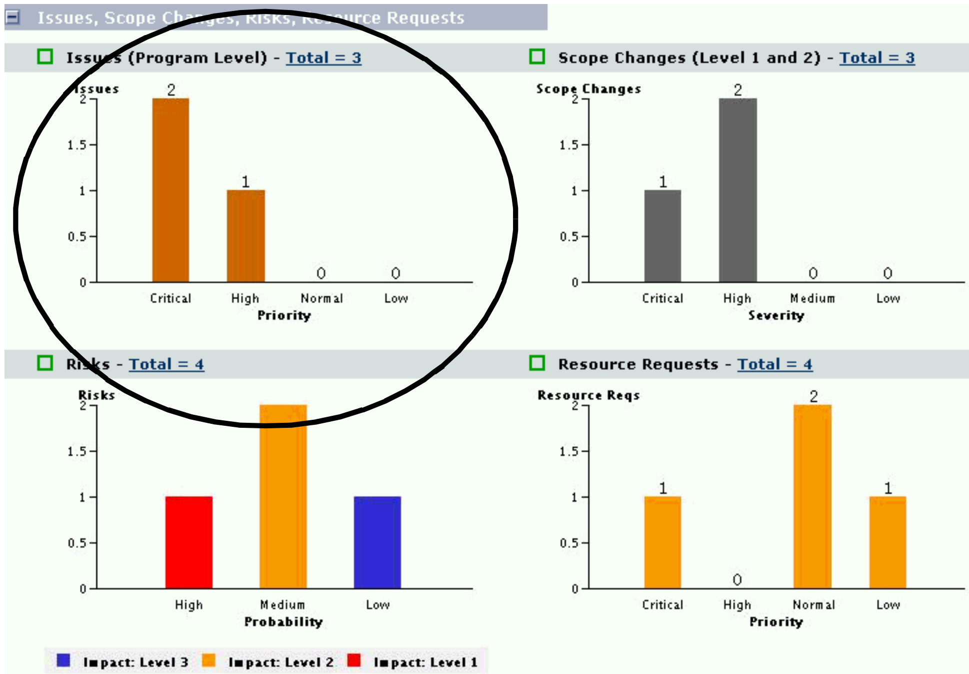
Figure 4-1 Program Issue List Portlet

This Portlet can have multiple instances for viewing different Programs and their associated Issues. The Program Issue List Portlet can be personalized to display Issues based on specified criteria (Status, Priority, Escalation Level, etc.). You can also specify how the Issues are grouped. Mercury ITG users with the proper level of access can also use the Workbench to specify which columns should be included in the Portlet's display.

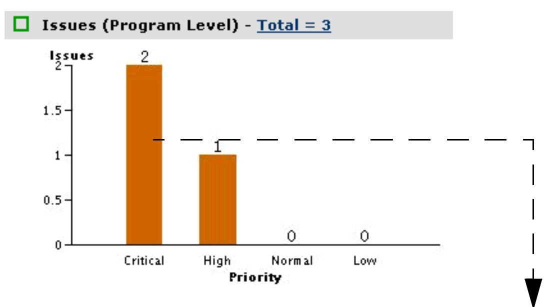
- If the Issue is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Issue # to see the Issue page.

Manage Program Page: Issues

The Manage Program page has a bar chart summarizing the Issues submitted for the Program.



Click on the bar for any Issue group to go to the drill-down page listing all the Issues in that particular group.



Improve Customer Service Issues

Showing **1** to **2** of **2**

Project	Issue #	Priority	Escalation Level	Status	Description
Sales System Application 2.3	30045	Critical	Program	New	Developers appear to be using different programming languages
Sales System Application 2.3	30048	Critical	Program	New	Hardware for developers has not arrived

Showing **1** to **2** of **2**

Click on the Issue # to see the Issue page.

Working With Resource Requests

A Program Manager may need to ask for additional resources from other departments from time to time. The Program Manager may also want to view current resource allocations to determine Program areas that are overloaded or understaffed. Resource Requests and Program Management Portlets help the Program Manager to accomplish these tasks more easily and efficiently. The following sections discuss working with Resources and Resource Requests in more detail:

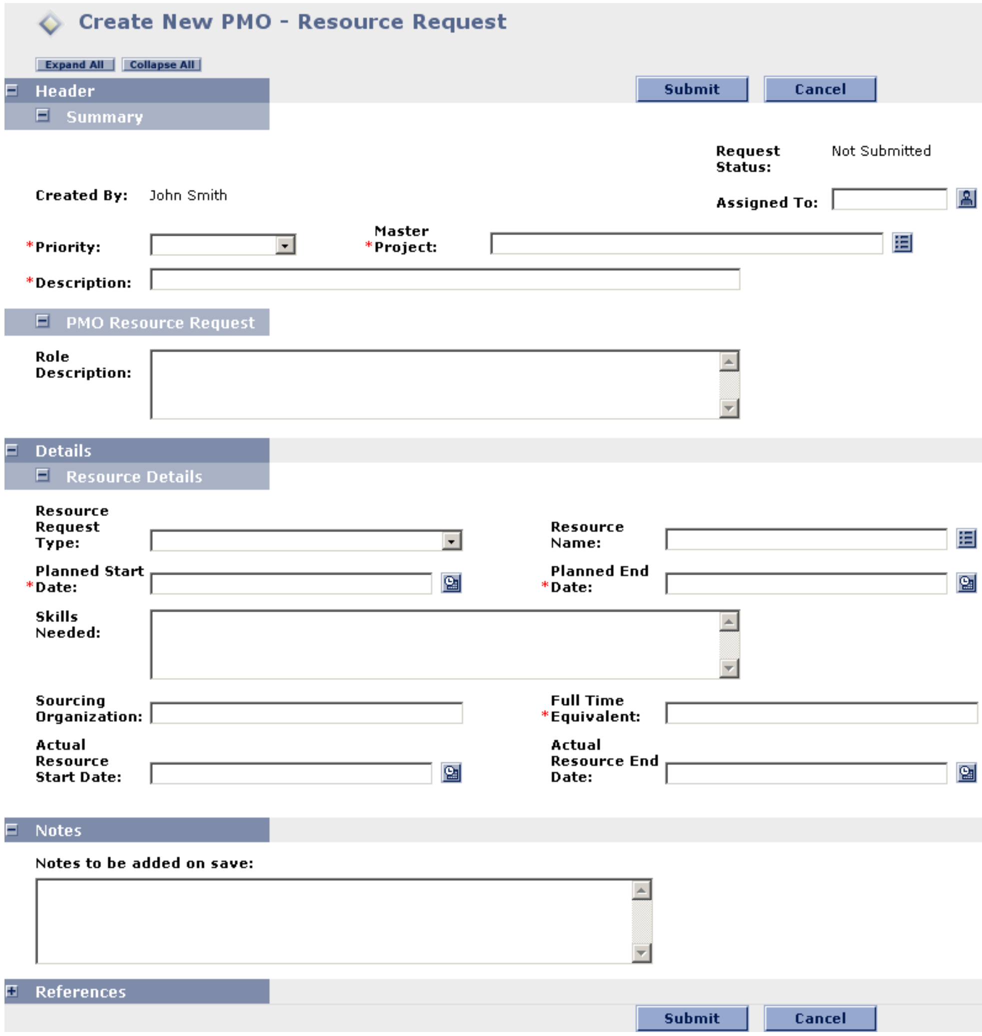
- *Requesting a Resource*
- *Viewing Resource Assignments*
- *Managing Resource Requests*

Requesting a Resource

To submit a Resource Request:

1. Select **Create > Project Resource Request** or **PMO > Resource Requests> Request a Project Resource** from the menu bar.

   The Request Creation page opens with the Resource Request Request Type loaded.



2. Fill in all required fields and any optional fields.

3. Click **Submit** to submit the Request.

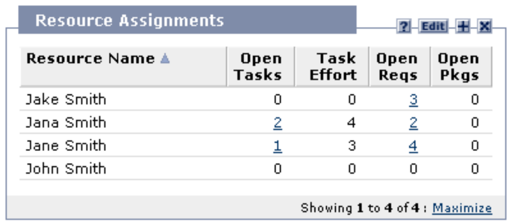
   The Resource Request begins moving along its pre-defined Workflow toward resolution.

Note

In order to show up in Program Management Portlets, the Request must be Referenced to a Project associated with a Program or attached directly as a Reference.

Viewing Resource Assignments

The Resource Assignment Portlet provides a quick view of the workload for Resources or groups of Resources and the Tasks, Requests, and Packages assigned to each.



Resource Name	Open Tasks	Task Effort	Open Reqs	Open Pkgs
Jake Smith	0	0	3	0
Jana Smith	2	4	2	0
Jane Smith	1	3	4	0
John Smith	0	0	0	0

Showing **1** to **4** of **4** : Maximize

Figure 4-2 Resource Assignment Portlet

You can choose to display Resources based on:

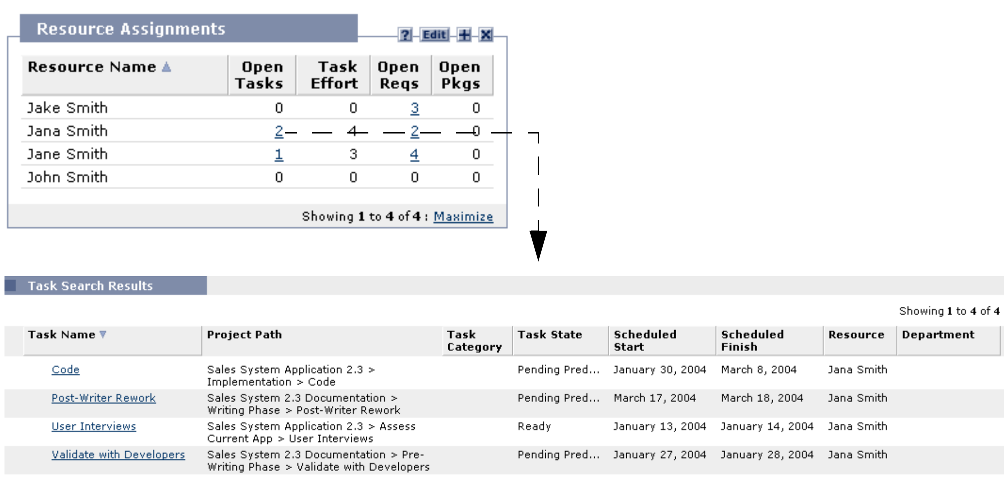
- Resource Group
- Project Team
- Resource Name

Additionally, the Request Types displayed in the Portlet can be filtered.

Example

You can personalize the Portlet to display members of a Resource Group and the number of Bugs assigned to each.

Click on the number of Tasks, Requests, or Packages to go to the Task, Request, or Package drill-down page.



Resource Name	Open Tasks	Task Effort	Open Reqs	Open Pkgs
Jake Smith	0	0	3	0
Jana Smith	2	4	2	0
Jane Smith	1	3	4	0
John Smith	0	0	0	0

Showing **1** to **4** of **4** : Maximize

Showing **1** to **4** of **4**

Task Name	Project Path	Task Category	Task State	Scheduled Start	Scheduled Finish	Resource	Department
Code	Sales System Application 2.3 > Implementation > Code		Pending Pred...	January 30, 2004	March 8, 2004	Jana Smith	
Post-Writer Rework	Sales System 2.3 Documentation > Writing Phase > Post-Writer Rework		Pending Pred...	March 17, 2004	March 18, 2004	Jana Smith	
User Interviews	Sales System Application 2.3 > Assess Current App > User Interviews		Ready	January 13, 2004	January 14, 2004	Jana Smith	
Validate with Developers	Sales System 2.3 Documentation > Pre-Writing Phase > Validate with Developers		Pending Pred...	January 27, 2004	January 28, 2004	Jana Smith	

Showing **1** to **4** of **4**

Click on the Task Name, Request #, or Package # to go to the Task, Request, or Package page.

Managing Resource Requests

There are two places to obtain a convenient overview of Resource Requests for a Program:

- *Program Resource Request List Portlet*
- *Manage Program Page: Resource Requests*

Program Resource Request List Portlet

The Program Resource Request List Portlet lists all the Resource Requests associated with a particular Program.

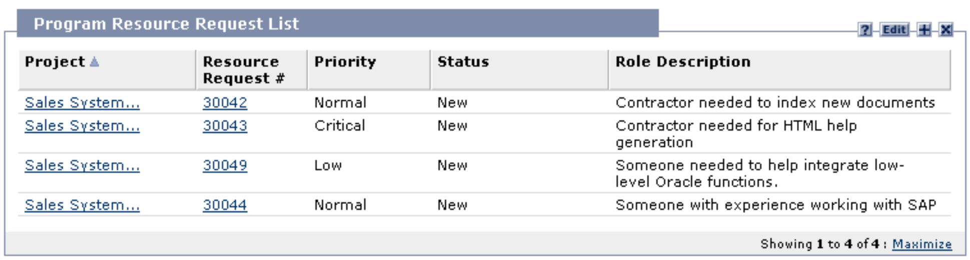


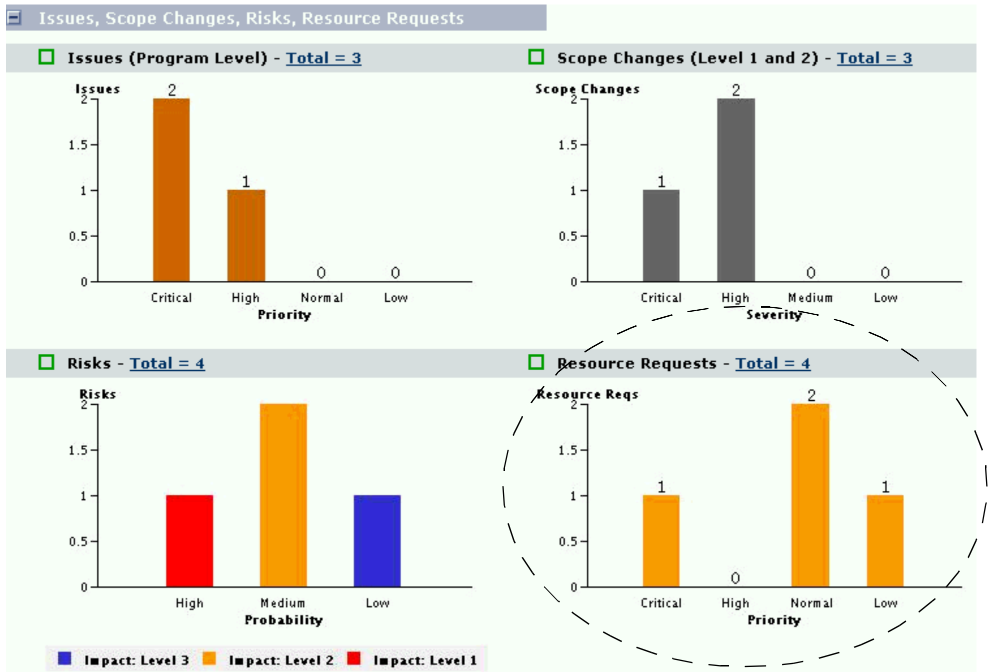
Figure 4-3 Resource Request List Portlet

This Portlet can have multiple instances for viewing different Programs and their associated Resource Requests. The Program Resource Request List Portlet can be personalized to display Resource Requests based on specified criteria (Created in the last X days, Status, Priority, etc.). You can also specify how the Resource Requests are grouped. Mercury ITG users with the proper level of access can also use the Workbench to specify which columns should be included in the Portlet's display.

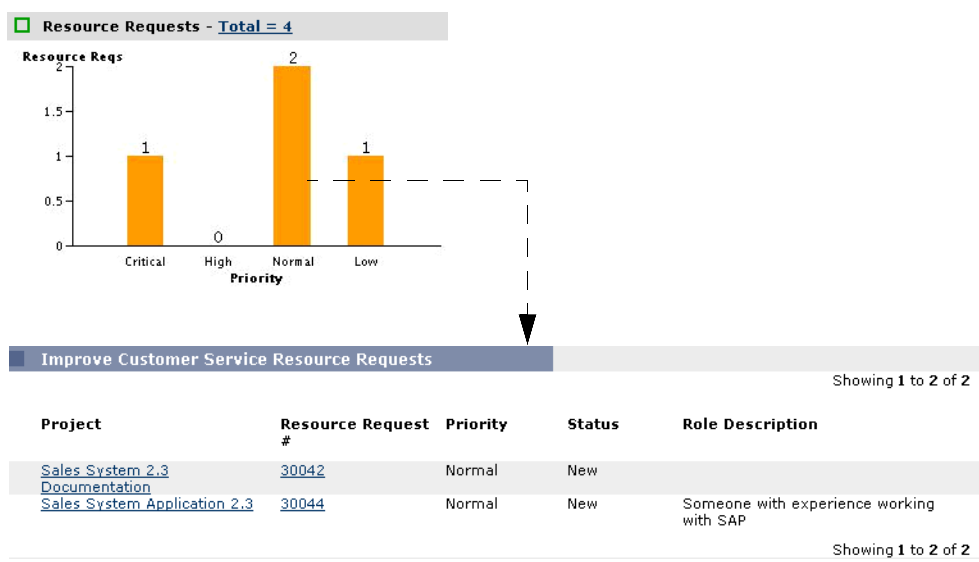
- If the Resource Request is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Resource Request # to see the Resource Request page.

Manage Program Page: Resource Requests

The Manage Program page has a bar chart summarizing the Resource Requests submitted for the Program.



Click on the bar for any Resource Request group to go to the drill-down page listing all the Resource Requests in that particular group.



Project	Resource Request #	Priority	Status	Role Description
Sales System 2.3 Documentation	30042	Normal	New	
Sales System Application 2.3	30044	Normal	New	Someone with experience working with SAP

Showing 1 to 2 of 2

Click on the Resource Request # to see the Resource Request page.

Working With Risks

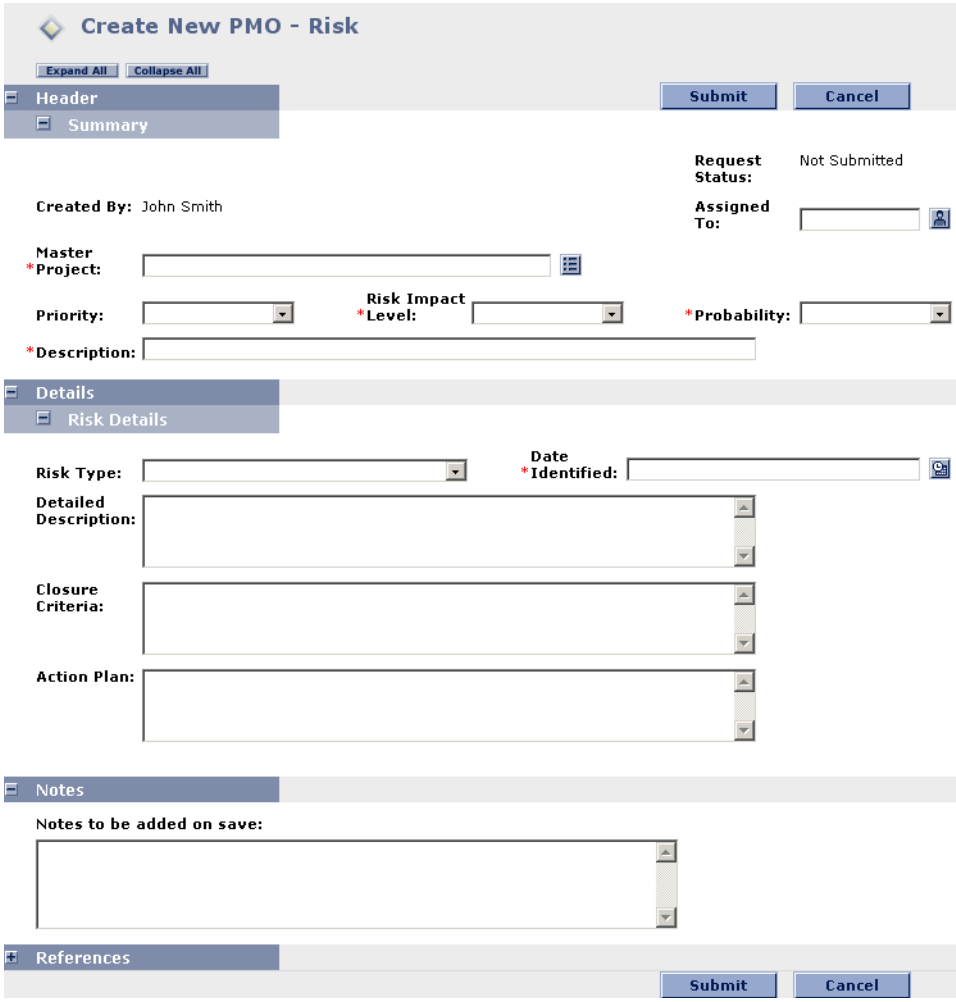
Risks to a Program might be identified during its life cycle. The Program Management Risk Request Type is a way to identify these Risks, collect key information about them (impact level, probability of occurring), and deal with them in a timely manner. The following sections discuss working with Risks in more detail:

- *Submitting a Risk*
- *Managing Risks*

Submitting a Risk

To submit a Risk:

1. Select **Create > Project Risk** or **PMO > Risks > Submit a Project Risk** from the menu bar.
2. The Request Creation page opens with the Risk Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **Submit** to submit the Request.

   The Risk begins moving along its pre-defined Workflow toward resolution.

Note

In order to show up in Program Management Portlets, the Request must be Referenced to a Project associated with a Program or attached directly as a Reference.

Managing Risks

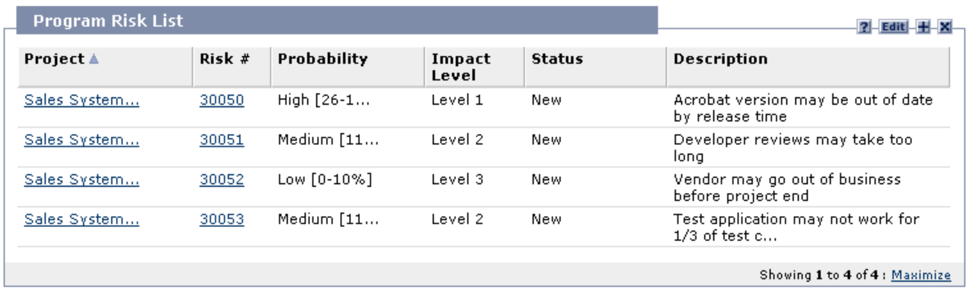
There are two places to obtain a convenient overview of Risks for a Program:

- *Program Risk List Portlet*

- *Manage Program Page: Risks*

Program Risk List Portlet

The Program Risk List Portlet lists all the Risks associated with a particular Program.



Program Risk List

Project	Risk #	Probability	Impact Level	Status	Description
Sales System...	30050	High [26-1...	Level 1	New	Acrobat version may be out of date by release time
Sales System...	30051	Medium [11...	Level 2	New	Developer reviews may take too long
Sales System...	30052	Low [0-10%]	Level 3	New	Vendor may go out of business before project end
Sales System...	30053	Medium [11...	Level 2	New	Test application may not work for 1/3 of test c...

Showing **1** to **4** of **4** : Maximize

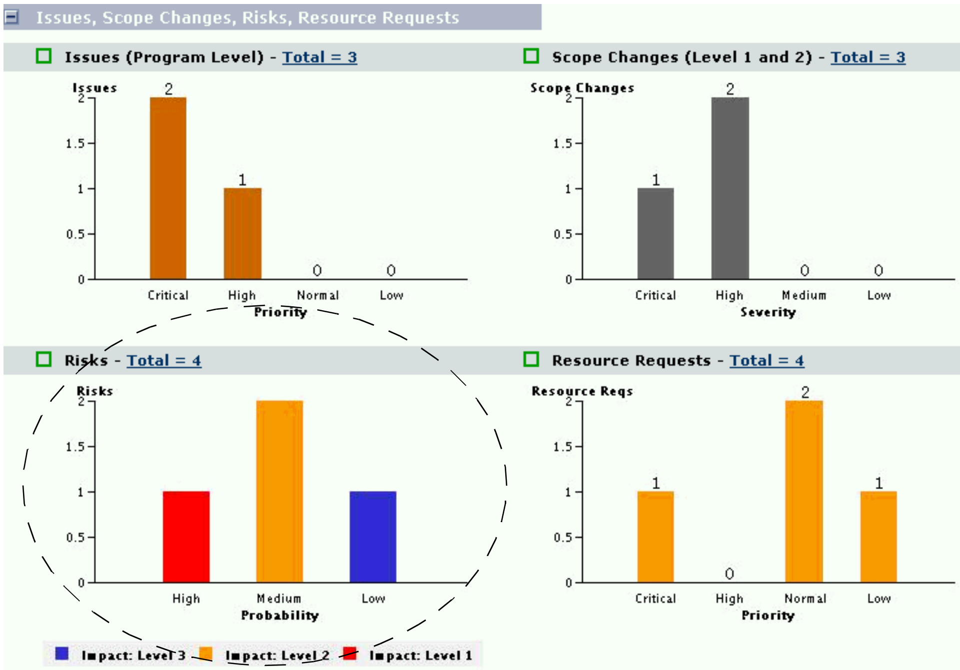
Figure 4-4 Program Risk List Portlet

This Portlet can have multiple instances for viewing different Programs and their associated Risks. The Program Risk List Portlet can be personalized to display Risks based on specified criteria (Status, Impact Level, Probability, etc.). You can also specify how the Risks are grouped. Mercury ITG users with the proper level of access can also use the Workbench to specify which columns should be included in the Portlet's display.

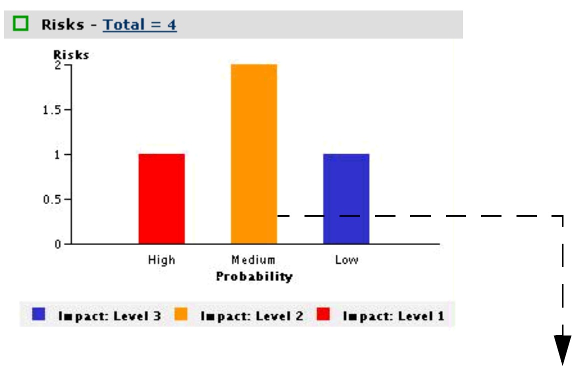
- If the Risk is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Risk # to see the Risk page.

Manage Program Page: Risks

The Manage Program page has a bar chart summarizing the Risks submitted for the Program.



Click on the bar for any Risk group to go to the drill-down page listing all the Risks in that particular group.



Improve Customer Service Risks

Showing **1** to **2** of **2**

Project	Risk #	Probability	Impact Level	Status	Description
Sales System 2.3 Documentation	30051	Medium [11-25%]	Level 2	New	Developer reviews may take too long
Sales System Application 2.3	30053	Medium [11-25%]	Level 2	New	Test application may not work for 1/3 of test cases

Showing **1** to **2** of **2**

Click on the Risk # to see the Risk page.

Working With Scope Changes

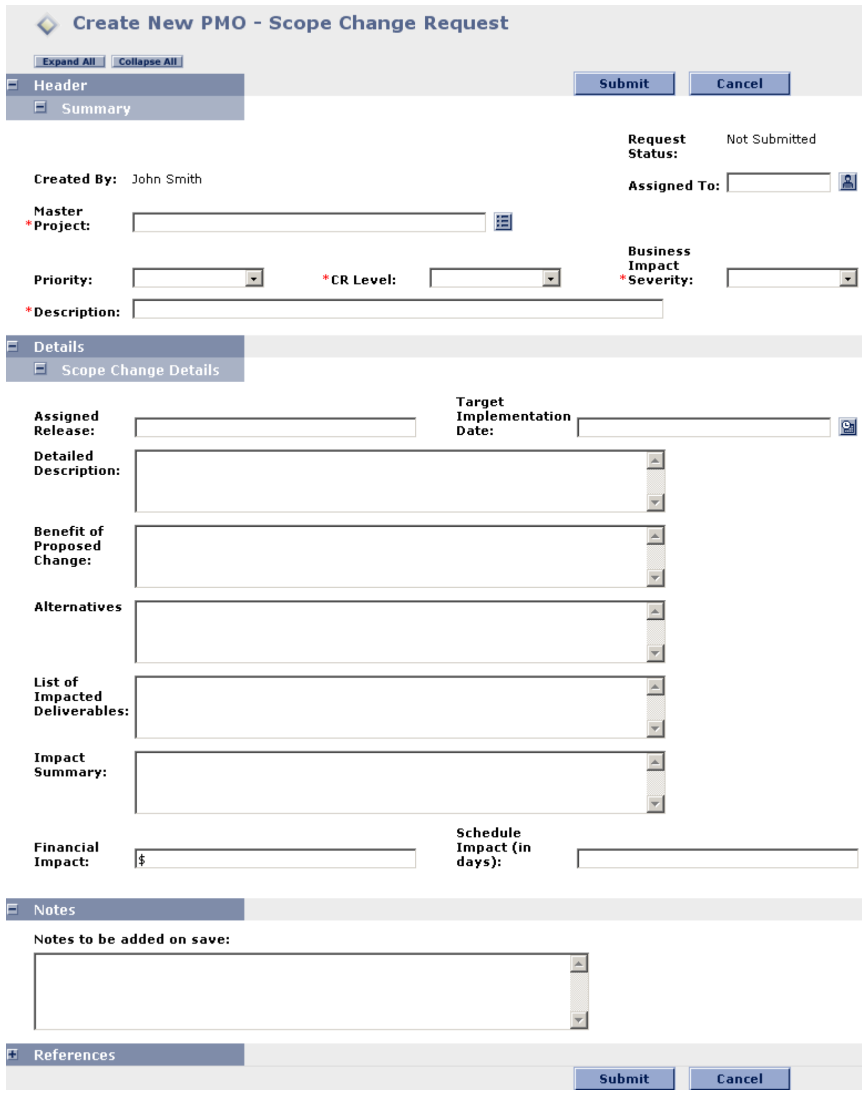
During the life cycle of a Program, some problem or business decision may occur that necessitates a change in the Program's scope. These changes can be brought up, processed, and decided upon in the form of Scope Change Requests. The following sections discuss working with Scope Changes in more detail:

- *Submitting a Scope Change*
- *Managing Scope Changes*

Submitting a Scope Change

To submit a Scope Change:

1. Select **Create > Project Scope Change** or **PMO > Scope Changes > Request a Project Scope Change** from the menu bar.
2. The Request Creation page opens with the Scope Change Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **Submit** to submit the Request.

   The Scope Change begins moving along its pre-defined Workflow toward resolution.

Note

In order to show up in Program Management Portlets, the Request must be Referenced to a Project associated with a Program or attached directly as a Reference.

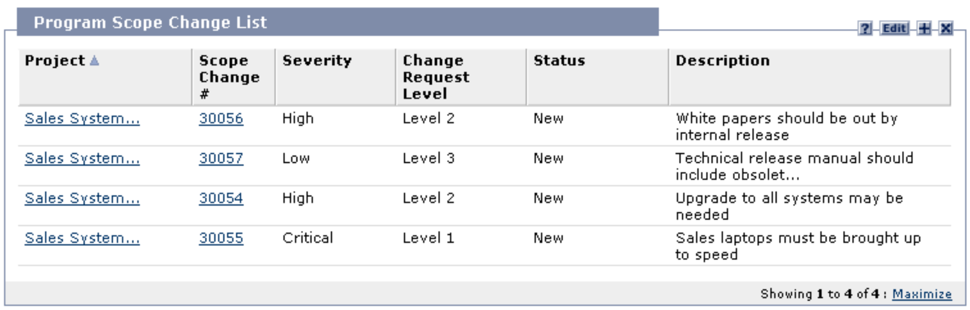
Managing Scope Changes

There are two places to obtain a convenient overview of Scope Changes for a Program:

- *Program Scope Change List Portlet*
- *Manage Program Page: Scope Change*

Program Scope Change List Portlet

The Program Scope Change List Portlet lists all the Scope Changes associated with a particular Program.


Program Scope Change List

Project ▲	Scope Change #	Severity	Change Request Level	Status	Description
Sales System...	30056	High	Level 2	New	White papers should be out by internal release
Sales System...	30057	Low	Level 3	New	Technical release manual should include obsolet...
Sales System...	30054	High	Level 2	New	Upgrade to all systems may be needed
Sales System...	30055	Critical	Level 1	New	Sales laptops must be brought up to speed

Showing 1 to 4 of 4 : Maximize

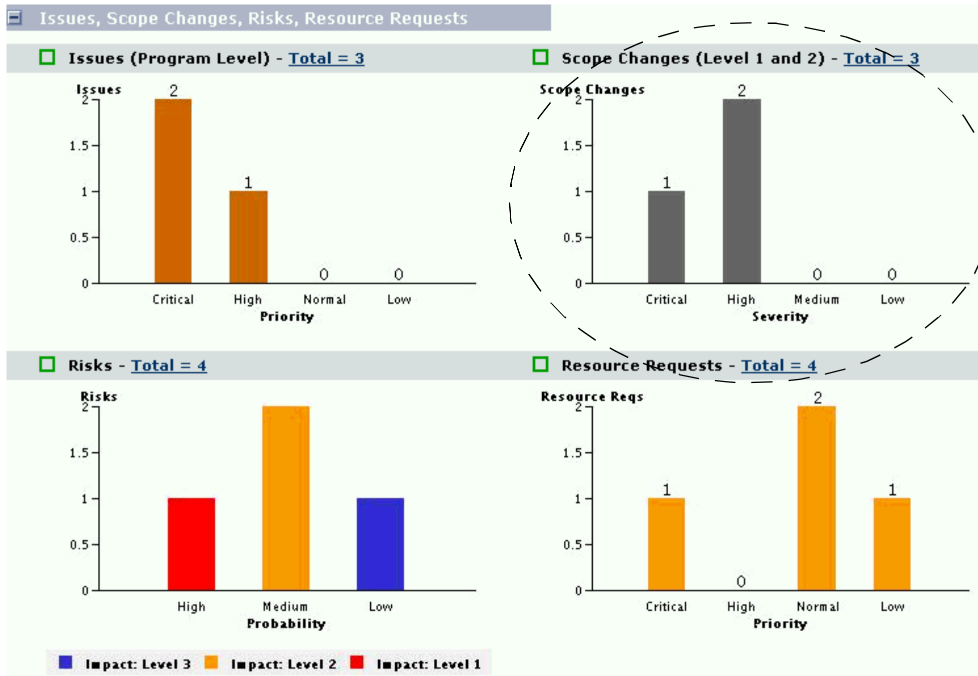
Figure 4-5 Program Scope Change List Portlet

This Portlet can have multiple instances for viewing different Programs and their associated Scope Changes. The Program Scope Change List Portlet can be personalized to display Scope Changes based on specified criteria (Status, Severity, CR Level, etc.). You can also specify how the Scope Changes are grouped. Mercury ITG users with the proper level of access can also use the Workbench to specify which columns should be included in the Portlet's display.

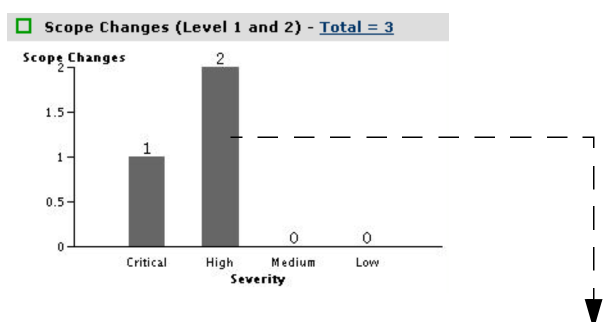
- If the Scope Change is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Scope Change # to see the Scope Change page.

Manage Program Page: Scope Change

The Manage Program page has a bar chart summarizing the Scope Changes submitted for the Program.



Click on the bar for any Scope Change group to go to the drill-down page listing all the Scope Changes in that particular group.



Improve Customer Service Scope Change

Showing **1** to **2** of **2**

Project	Scope Change #	Severity	Change Request Level	Status	Description
Sales System Application 2.3	30054	High	Level 2	New	Upgrade to all systems may be needed
Sales System 2.3 Documentation	30056	High	Level 2	New	White papers should be out by internal release

Showing **1** to **2** of **2**

Click on the Scope Change # to see the Scope Change page.

Working With Programs

Programs can be impacted by Issues, Resource Requests, Risks, Scope Changes, and many other factors that may necessitate alterations to a Program. The Manage Program page provides a central location from which to view various Program details or make changes.

The following sections discuss working with Programs in more detail:

- *Searching for Programs*

- *Updating Program Priority*
- *Viewing Program Projects*
- *Viewing Cost Information*
- *Viewing Resource Information*
- *Modifying Existing Programs*
- *Modifying Indicator Settings*
- *Modifying Program Access*
- *Deleting a Program*

Searching for Programs

The Program List Portlet provides a high-level summary of the details and current status of all Programs in your system by default.

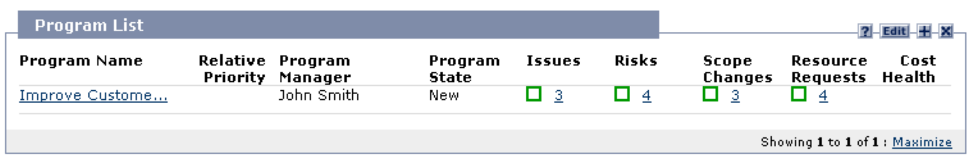


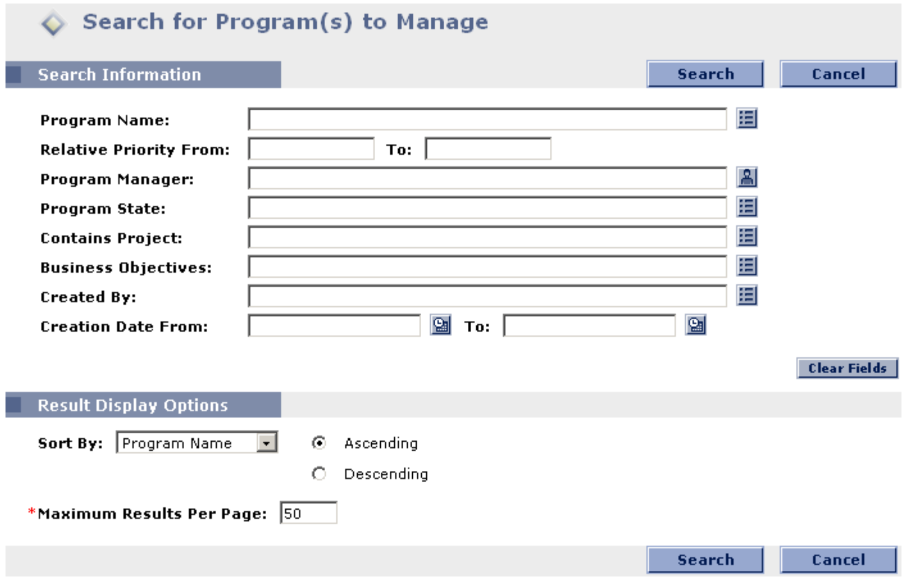
Figure 4-6 Program List Portlet

Click on a Program Name to proceed to the Manage Program page for that Program.

To search for Programs:

1. Select **PMO > Manage Programs** from the menu bar.

   The Search for Programs to Manage page opens.



2. Enter any search criteria and click **Search**.

   The Program Search Results page opens.

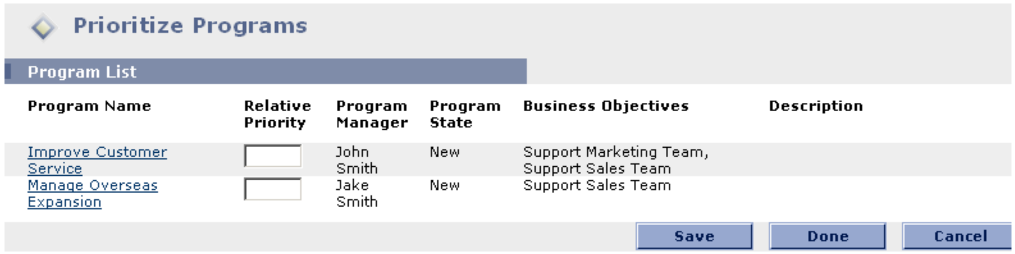
3. Click on a Program Name to proceed to the Manage Program page for that Program.

Updating Program Priority

To change a Program's relative Priority:

1. Select **PMO > Manage Program Priority** from the menu bar.

   The Prioritize Programs page opens.



2. Enter the Program's new Priority in the Relative Priority field.

3. Click **Done** to save changes and return to the last Dashboard page you visited.

   Click **Save** to save changes and continue to work in the Update Program Priority page. Click **Cancel** to return to the last Dashboard page you visited without saving changes.

Viewing Program Projects

There are two places to obtain a convenient overview of Projects associated with a Program:

- *Program Project List Portlet*
- *Manage Program Page: Projects*

Program Project List Portlet

The Program Project List Portlet provides a view into all the Projects associated with a Program and their respective health.

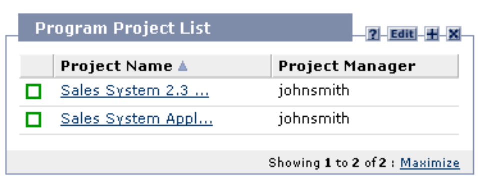


Figure 4-7 Program Project List Portlet

This Portlet can have multiple instances for viewing different Programs and their associated Projects. You can select which Projects the Portlet displays based on a number of specified criteria including Project Name, State, and Summary Condition.

Click on a Project Name to proceed to that Project's Overview page.

Manage Program Page: Projects

The Manage Program page displays a list of Projects associated with a Program.

Projects

Project Name	% Complete	Project State	Sched Start	Sched Finish	Project Manager
Sales System Application 2.3	0%	Active	1/13/04	4/9/04	John Smith
Sales System 2.3 Documentation	0%	Active	1/13/04	3/29/04	John Smith

Click on a Project Name to proceed to that Project's Overview page.

Viewing Cost Information

You can track Cost data for Programs. Enabling Cost tracking can be done when first creating a Program or modifying an existing Program. See *"Configuring Indicator Settings"* on page 21 or *"Modifying Indicator Settings"* on page 54 for more detailed information on turning on Cost tracking.

You can analyze Cost data for Programs by doing one of the following:

- Clicking the **Costing Information** tab in the Manage Programs page and clicking **Analyze** for either Current or Cumulative Cost Metrics.
- Selecting **Cost** > **Programs** > **Current** or **Cumulative Cost Metrics** from the menu bar.

These analyses are identical to Cost data analyses for Projects. See Managing Your Projects (Project Management) for more information on Cost visibility.

Viewing Resource Information

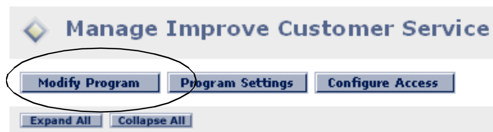
When creating Staffing Profiles or Resource Pools, you can associate them with a Program for easy reference-ability. See Managing Your Resources (Resource Management) for more detailed information on Staffing Profiles and Resource Pools.

Modifying Existing Programs

Existing Programs can be modified from the Modify Program page, reached from the Manage Program page.

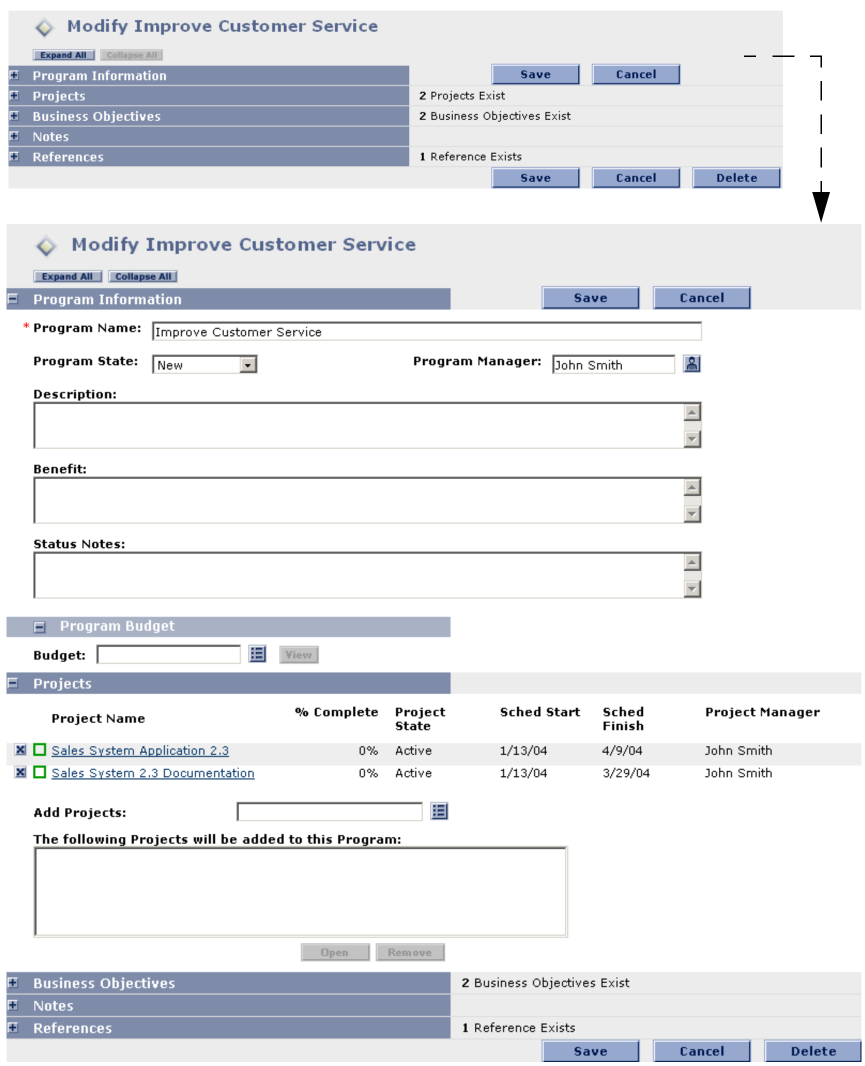
To modify Program information, Notes, associated Projects, Business Objectives, or References:

1. Navigate to the desired Program's Manage Program page.



2. Click **Modify Program**.

   The Modify Program page opens. Click the button or **Expand All** to expand specific sections.



3. Make any desired changes to the Program Information, Notes, associated Projects, Business Objectives, or References.

4. Click **Save**.

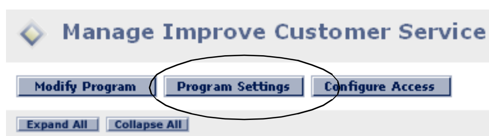
   The Manage Program page opens, and the changes to the Program are saved.

Modifying Indicator Settings

Program Summary Condition Indicators are typically configured when a Program is created. These Indicator settings can be changed at any time from the Manage Program page.

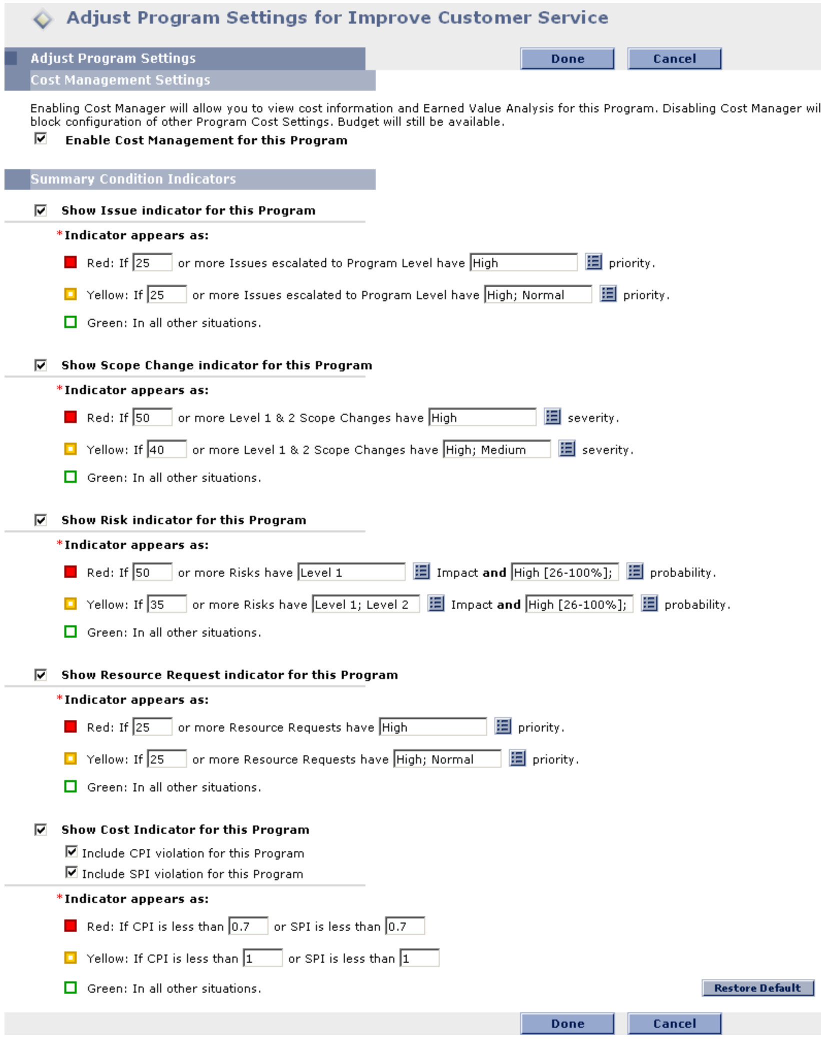
To modify a Program's Summary Condition Indicator configuration:

1. Navigate to the desired Program's Manage Program page.



2. Click **Program Settings**.

   The Adjust Program Settings page opens.



3. Make any desired changes to the Program's Summary Condition Indicator configurations.

4. Click **Done**.

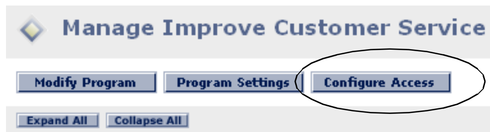
   The Manage Program page opens, and the changes to the Summary Condition Indicator settings are saved.

Modifying Program Access

Access to a Program is typically configured when a Program is created. The access settings can be changed at any time from the Manage Program page.

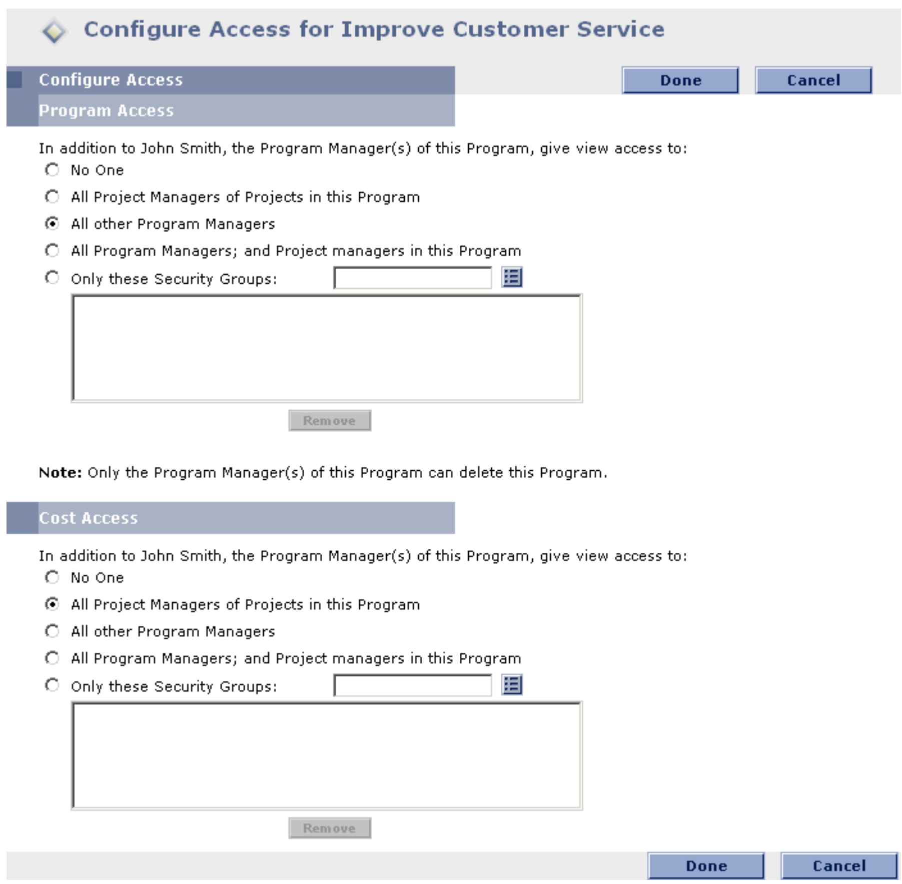
To modify a Program's ac>cess configuration:

1. Navigate to the desired Program's Manage Program page.



2. Click **Configure Access**.

   The Configure Access page opens.



3. Make any desired changes to the Program's user access configurations.

4. Click **Done**.

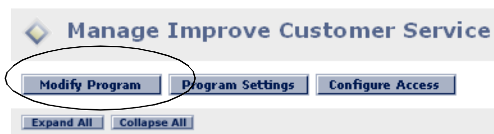
The Manage Program page opens, and the changes to the Summary Condition Indicator settings are saved.

Deleting a Program

Programs can be deleted from the Modify Program page.

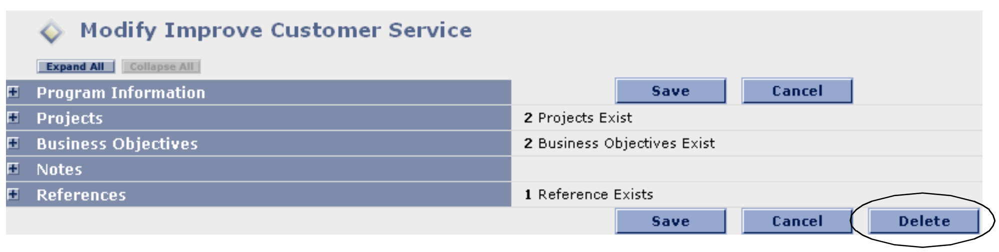
To delete a Program:

1. Navigate to the desired Program's Manage Program page.



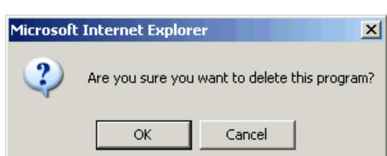
2. Click **Modify Program**.

   The Modify Program page opens.



3. Click **Delete**.

   A dialog window appears asking you to confirm whether you want to delete the Program.



4. Click **OK**.

   The Program is deleted.

Reporting on Programs

Program Management provides two sets of interactive Reports that can be used to view useful information on the four Program Management Request Types.

The following sections discuss the Program Management Reports in more detail:

- *Activity Reports*
- *Resolution Time Reports*

Note

Activity and Resolution Time Reports are the same for each Program Management Request Type.

Activity Reports

The Activity Report for Program Management displays resolution and creation numbers for a category of Program Management Request (Issues, Resource Requests, Risks, or Scope Changes) in parallel bar charts.

The chart display can be filtered according to several useful variables:

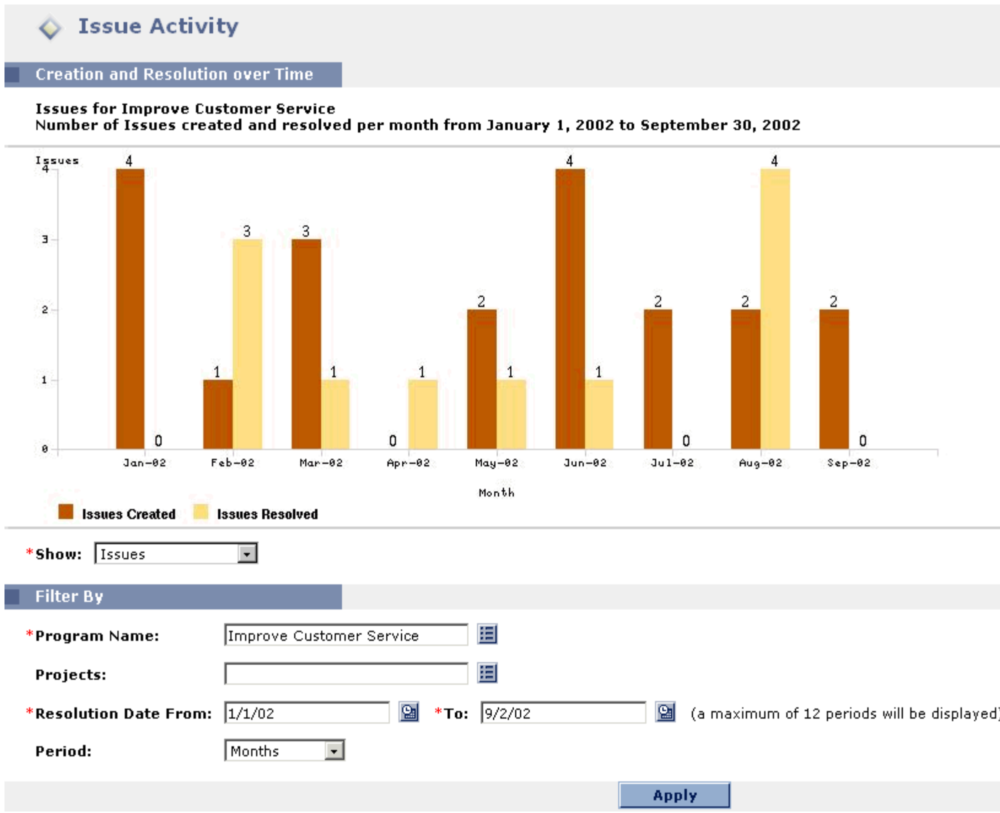
- Program Name (required)
- Projects
- Resolution Date From/To (required)
- Period

To access the Activity Report for a Program Management Request:

1. Log onto Program Management.
2. Select **PMO > (the Program Management Request you want) > Analyze (Program Management Request) Activity** from the menu bar.

   The (Program Management Request) Activity page opens.
3. Set all required filter fields and any optional fields.
4. Click Apply.

5. The (Program Management Request) Activity page reloads, displaying the Activity Report chart.



To filter the chart display, enter the desired criteria into the proper fields and click **Apply**. The Activity Report page reloads with the new filter criteria applied.

Resolution Time Reports

The Resolution Time Report for Program Management displays resolution time in days over a period of time for a category of Program Management Request (Issues, Resource Requests, Risks, or Scope Changes) in line graph form. The numbers for each period (week or month) are averaged, and the average appears in the center of the period as a point.

The chart display can be filtered according to several useful variables:

- Program Name (required)
- Projects
- Resolution Date From/To (required)

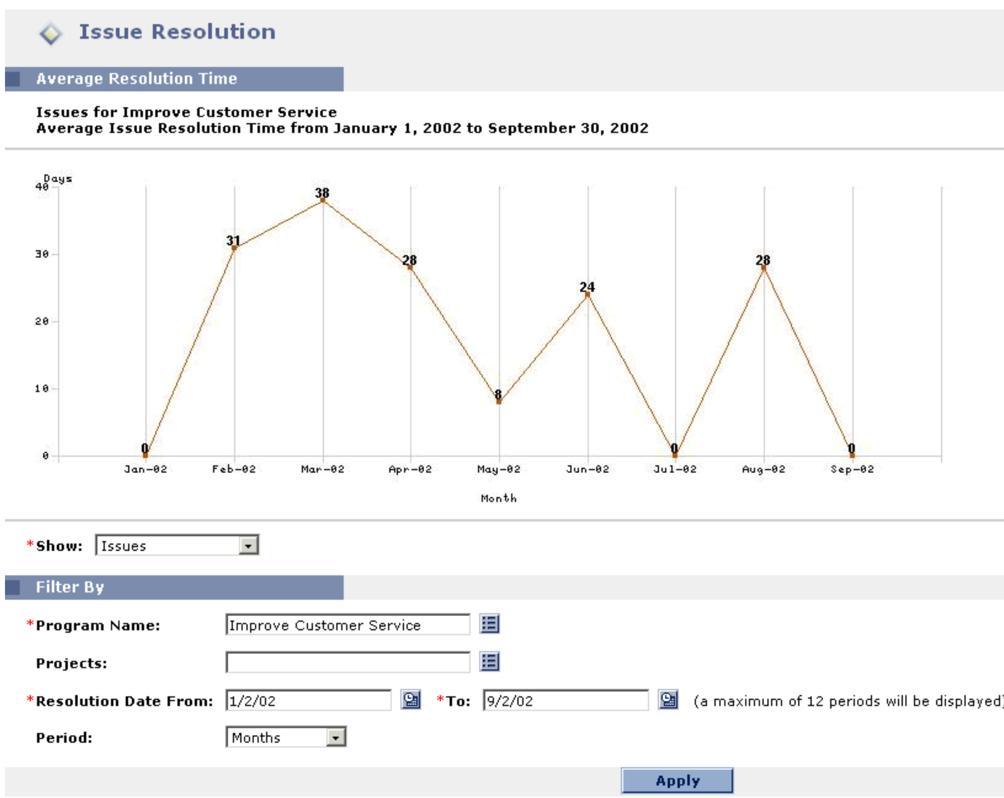
- Period

To access the Resolution Time Report for a Program Management Request:

1. Log onto Program Management.
2. Select **PMO > (the Program Management Request you want) > Analyze (Program Management Request) Resolution Time** from the menu bar.

   The (Program Management Request) Resolution page opens.
3. Set all required filter fields and any optional fields.
4. Click Apply.

   The (Program Management Request) Resolution page reloads, displaying the Resolution Time Report chart.



To change the chart display, enter the desired criteria into the proper fields and click **Apply**. The Resolution Time Report chart reloads with the new filter criteria applied.

Appendix A
User Licensing and Access

This appendix discusses the licenses, Access Grants, and Security Groups delivered with Mercury Program Management.

The following topics are discussed:

- *Program Management License*
- *Program Management Access Grants*

Note

Licenses, user accounts and Security Groups are assigned by the Mercury ITG Center Administrator. Contact your application administrator for matters relating to Program Management licenses.

Program Management License

The Program Management license grants access to general Program Management functionality and to configure general Program Management settings. All users who will be using Program Management must have a Program Management license.

Some Program Management functionality is controlled on a more granular level, either by groups of users or individuals. This level of access is controlled by *Program Management Access Grants*.

Program Management Access Grants

Programs are controlled on a more granular level than simply the Program Management license, which allows only general access to Program Management. Program Access Grants allow a Mercury ITG Administrator to grant partial or total access to Programs to groups of users or individuals.

Users are linked to Access Grants through the Security Group they are a part of. For more information on Access Grants and Security Groups, see Security Model Guide and Reference.

The Access Grants surrounding Programs are listed in *Table A-1*. Without these Access Grants, a user cannot view or edit a Program regardless of whether they are specified in the list on the Program's Configure Access page.

Table A-1. Program Access Grants

Access Grant	Description
View Programs	The user can view any Program for which they are on the specified View or Edit list.
Edit Programs	The user can view, edit and delete any Program for which they are on the specified Edit list, as well as create new Programs.
Manage Programs	The user can view, edit and delete any Program in the system, as well as create new Programs.

Appendix B
Program Management and the Mercury ITG Dashboard

This appendix describes the Portlets delivered with Mercury Program Management and provides definitions for their filter fields.

The following topics are discussed:

- *Program List Portlet*
- *Program Project List Portlet*
- *Resource Assignments Portlet*
- *Program Issue List Portlet*
- *Program Resource Request List Portlet*
- *Program Risk List Portlet*
- *Program Scope Change List Portlet*

Program List Portlet

The Program List Portlet provides a high-level summary of the details and current status of all Programs in your system by default. The Program List Portlet can be personalized. *Table B-1* describes the Portlet's filter fields.

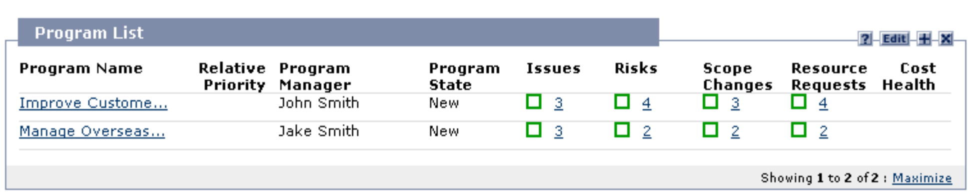


Figure B-1 Program List Portlet

Table B-1. Program List Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Program Name	Filters by Program names.
Relative Priority From/To	Only displays Programs within the specified Priority range.
Program Manager	Filters by Programs Manager.
Program State	Filters by Program State.
Contains Projects	Only displays Programs containing the specified Projects.
Business Objectives	Filters by Business Objective(s).
Created By	Only displays Programs created by the specified user.
Creation Date From/To	Only displays Programs created within the specified time range.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

Program Project List Portlet

The Program Project List Portlet provides a view into all the Projects associated with a Program and their respective health. *Table B-2* describes the Portlet's filter fields.

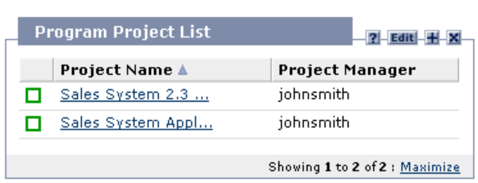


Figure B-2 Program Project List Portlet

Table B-2. Program Project List Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Program Name	Filters by Program name.
Project Name	Filters by Project name.
Project Manager	Filters by Project Manager.
Project State	Filters by Project State.
Summary Condition	Filters by Project Summary Condition.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

Resource Assignments Portlet

The Resource Assignment Portlet provides a quick view of the workload for Resources or groups of Resources and the Tasks, Requests, and Packages assigned to each. *Table B-3* describes the Portlet's filter fields.

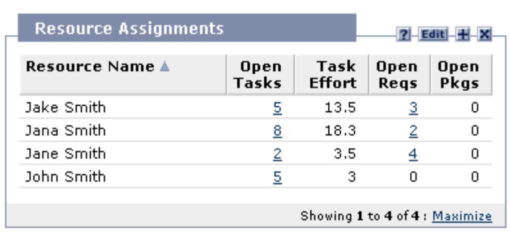


Figure B-3 Resource Assignments Portlet

Table B-3. Resource Assignments Portlet - Filter Fields

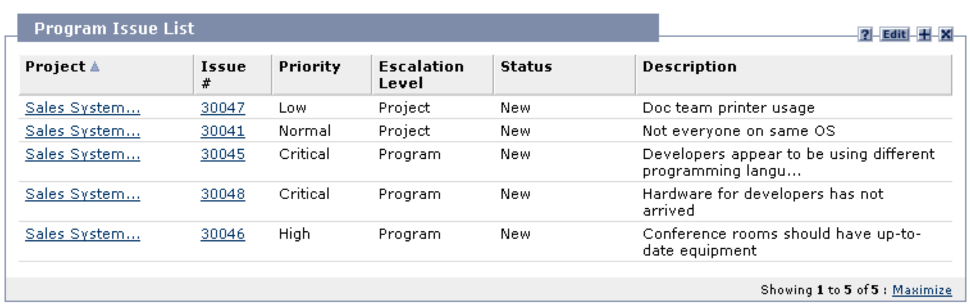
Field	Description
Title	The title of the Portlet.

Table B-3. Resource Assignments Portlet - Filter Fields

Field	Description
Resource	Filters by Resource.
Resource Group	Filters by Resource Group.
Task Window (Starting Before Current Date + X Days)	Filters by Tasks starting before the current date plus X days.
Limit by Task State	Filters by the state of assigned Tasks.
Request Type	Filters by Request Type being processed.
Package Workflow	Filters by Package Workflow being used.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

Program Issue List Portlet

The Program Issue List Portlet lists all the Issues associated with a selected Program. *Table B-4* describes the Portlet's filter fields.



Program Issue List

Project	Issue #	Priority	Escalation Level	Status	Description
Sales System...	30047	Low	Project	New	Doc team printer usage
Sales System...	30041	Normal	Project	New	Not everyone on same OS
Sales System...	30045	Critical	Program	New	Developers appear to be using different programming langu...
Sales System...	30048	Critical	Program	New	Hardware for developers has not arrived
Sales System...	30046	High	Program	New	Conference rooms should have up-to-date equipment

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Figure B-4 Program Issue List Portlet

Table B-4. Program Issue List Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.

Table B-4. Program Issue List Portlet - Filter Fields

Field	Description
Program Name	Filters by Program Name.
Escalation Level	Filters by Escalation Level.
Priority	Filters by Priority.
Status	Filters by Status.
Include Closed?	Decides whether to include closed Issues.
Eligible for My Action?	Only displays Issues eligible to be acted on by the user.
Project	Filters by Project.
Assigned To	Only displays Issues assigned to the specified user.
Assigned To Group	Only displays Issues assigned to the specified group of users.
Created By	Only displays Issues created by the specified user.
Created in the Last X Days	Only displays Issues created in the last X days.
Updated in the Last X Days	Only displays Issues that have been updated in the last X days.
Not Updated in the Last X Days	Only displays Issues that have not been updated in the last X days.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

Program Resource Request List Portlet

The Program Resource Request List Portlet lists all the Resource Requests associated with a particular Program. *Table B-5* describes the Portlet's filter fields.

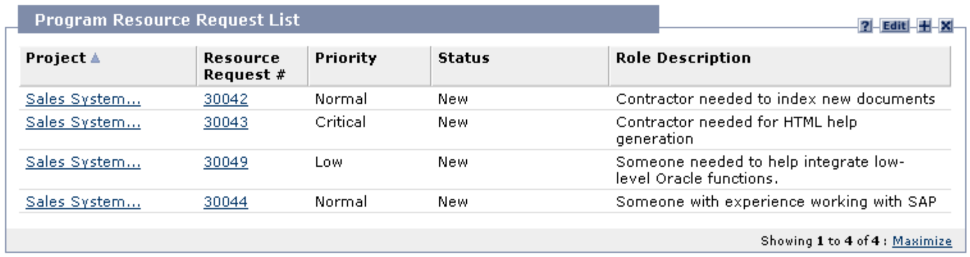

Figure B-5 Program Resource Request List Portlet

Table B-5. Program Resource Request List Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Program Name	Filters by Program Name.
Priority	Filters by Priority.
Status	Filters by Status.
Include Closed?	Decides whether to include closed Resource Requests.
Eligible for My Action?	Only displays Resource Requests eligible to be acted on by the user.
Project	Filters by Project.
Assigned To	Only displays Resource Requests assigned to the specified user.
Assigned To Group	Only displays Resource Requests assigned to the specified group of users.
Created By	Only displays Resource Requests created by the specified user.
Created in the Last X Days	Only displays Resource Requests created in the last X days.
Updated in the Last X Days	Only displays Resource Requests that have been updated in the last X days.
Not Updated in the Last X Days	Only displays Resource Requests that have not been updated in the last X days.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.

Table B-5. Program Resource Request List Portlet - Filter Fields

Field	Description
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

Program Risk List Portlet

The Program Risk List Portlet lists all the Risks associated with a selected Program. *Table B-6* describes the Portlet's filter fields.

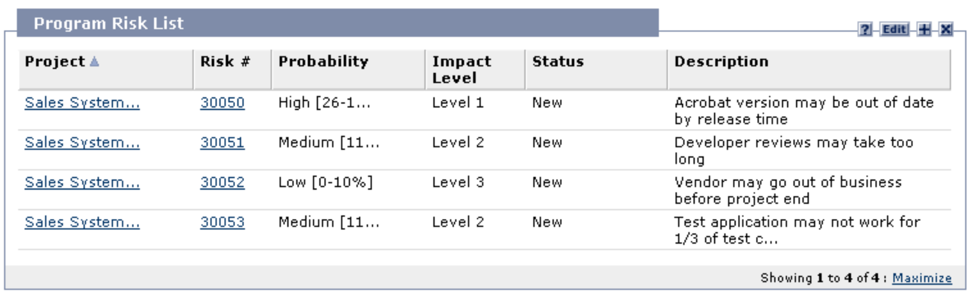

Figure B-6 Program Risk List Portlet

Table B-6. Program Risk List Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Program Name	Filters by Program Name.
Probability	Filters by Probability.
Impact Level	Filters by Impact Level.
Status	Filters by Status.
Include Closed?	Decides whether to include closed Risks.
Eligible for My Action?	Only displays Risks eligible to be acted on by the user.
Project	Filters by Project.
Assigned To	Only displays Risks assigned to the specified user.

Table B-6. Program Risk List Portlet - Filter Fields

Field	Description
Assigned To Group	Only displays Risks assigned to the specified group of users.
Created By	Only displays Risks created by the specified user.
Created in the Last X Days	Only displays Risks created in the last X days.
Updated in the Last X Days	Only displays Risks that have been updated in the last X days.
Not Updated in the Last X Days	Only displays Risks that have not been updated in the last X days.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

Program Scope Change List Portlet

The Program Scope Change List Portlet lists all the Scope Changes associated with a selected Program. *Table B-7* describes the Portlet's filter fields.

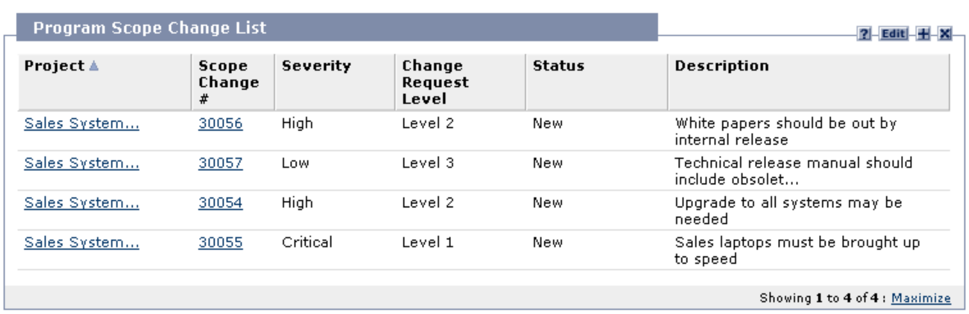

Figure B-7 Program Scope Change List Portlet

Table B-7. Program Scope Change List Portlet - Filter Fields

Field	Description
Title	The title of the Portlet.
Program Name	Filters by Program Name.
Severity	Filters by Severity.
Change Request Level	Filters by Change Request Level.
Status	Filters by Status.
Include Closed?	Decides whether to include closed Scope Changes.
Eligible for My Action?	Only displays Scope Changes eligible to be acted on by the user.
Project	Filters by Project.
Assigned To	Only displays Scope Changes assigned to the specified user.
Assigned To Group	Only displays Scope Changes assigned to the specified group of users.
Created By	Only displays Scope Changes created by the specified user.
Created in the Last X Days	Only displays Scope Changes created in the last X days.
Updated in the Last X Days	Only displays Scope Changes that have been updated in the last X days.
Not Updated in the Last X Days	Only displays Scope Changes that have not been updated in the last X days.
Sort By	Selects a criterion to order the Portlet by, and whether the data is in ascending or descending order.
Maximum Results Displayed	Sets the maximum number of results to display in the Portlet.

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