KINTANA™

Demand Management User Guide

Version 5.0.0

Publication Number: DemandUser-0603A

Kintana Version 5.0.0

Printed in USA

Kintana, Inc.
1314 Chesapeake Terrace, Sunnyvale, California 94089
Telephone: (408) 543-4400
Fax: (408) 752-8460
http://www.kintana.com

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Chapter 1
Introduction

It is difficult to track and articulate the value that IT provides to their supported business. Demand comes from many different sources into IT. Some demand is tracked in help desks, defect tracking systems, and/or service request systems, while even more gets tucked away in spreadsheets, post-it notes and e-mails. As a result, IT resources are pulled in many different directions, and their activities become misaligned with the business needs.

The Kintana Solution for Demand Management provides a single application and repository to capture all demand placed on IT. Kintana consolidates information from the many different sources so you can both view aggregate demand in real time and report against it. In addition, Kintana streamlines the end-to-end process (from demand through deployment) of fulfilling demand.

Standard categories allow IT organizations to normalize the demand from different sources to ensure that the right people are working on the right activities.

Features and Benefits

Single Application Captures all IT Demand

The Kintana Solution for Demand Management starts by capturing all IT demand from all sources. Whether this is a request for 2nd level application support entered directly, a ticket generated in an integrated help desk, or a request for a new initiative, Kintana captures all of these different types of requests while also allowing you to drive each request through its own process.

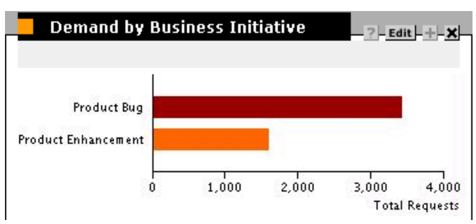
Configurable Workflows

Many IT organizations have invested heavily in defining processes, only to see them collect dust on a bookshelf when they are not enforced in the organization. Kintana captures these processes and automatically enforces them.

Proven-practice processes are included to provide a starting point for managing demand. Based on our experiences with more than 275 customers, these Request Types and workflows help manage new project initiation, bugs, enhancements, and operations requests.

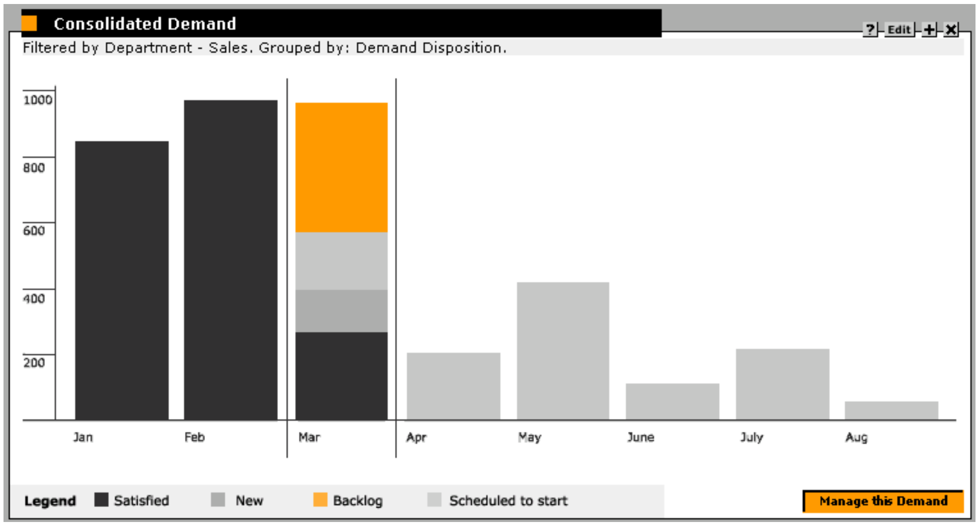
Standardize IT Demand

Performance reporting across demand types is easy with Kintana Solution for Demand Management as the solution provides categories for demand by source, driver, and owner data. This allows users to consolidate trends across different types of demand and slice and dice the data in multiple dimensions to assist in decision-making. With Kintana Dashboard, this same information is available in real-time, enabling quick decisions or adjustments as business priorities change.



Real-Time, Consolidated View of Demand

The Consolidated Picture of Demand provides a real time display that aggregates IT demand satisfied in past periods with IT demand and backlog in the current period. This view also allows you to manage demand by scheduling it forward to provide a quick view of what is planned in the future. For example, as business initiatives are re-prioritized, you can easily schedule all demand placed against lower priority initiatives to future period to quickly assess the impact of the shift and IT's ability to respond.



Additional Demand Management Functions

The Assignment Queue allows you to display lists of demand by user-defined categories and assign requests quickly from the same screen.

Beyond capturing data, some metrics (like SLA performance) are necessary to manage demand. The Kintana Solution for Demand Management helps manage Service Level Agreements (SLA) through configurable conditions and real-time views of SLA exceptions on Kintana Dashboard.

To properly use the Assignment Queue and SLA views, you need a view into what resources are working on. The Kintana Solution for Demand Management includes several views available on Kintana Dashboard that list demand by one or more categories, including groupings by assigned user or group.

Supported Roles

A set of pre-configured Dashboard/portlet templates are delivered with the Kintana Demand Management solution. Each template is pre-configured for a type of user business role. The following roles are supported:

- CIO or Demand Manager - Cross over with CIO, manages top level demand in an organization.

- Team/Group Manager - Manages a team or group of teams.

System Demand Types

The following Demand Types (delivered as Kintana Request Types) are included in the Demand Management solution.

- Initiative Process. From the Demand Management solution UI, users with appropriate permissions should be able to create new 'request' or 'demand' for a New Initiative.
- Application Enhancement Process. Users with appropriate permissions should be able to create Enhancement requests (or demands) from the Demand Management UI.
- Application Bug Process. Users with appropriate permissions should be able to create Bug requests (demands) from the Demand Management UI.
- Database Refresh Process. Users with Appropriate permissions should be able to create operations requests such as resetting passwords and creating a new password.

Additional Resources

Kintana provides the following additional resources to help you successfully implement, configure, maintain and fully utilize your Kintana installation:

- *Kintana Documentation*
- *Kintana Services*
- *Kintana Education*
- *Kintana Support*

Kintana Documentation

Kintana product documentation is linked from the Kintana Library page. This page is accessed by:

- Selecting **HELP > KINTANA LIBRARY** from the Kintana Workbench menu.

- Selecting **HELP > CONTENTS AND INDEX** from the menu bar on the HTML interface. You can then click the **KINTANA LIBRARY** link to load the full list of product documents.

Kintana organizes their documents into a number of user-based categories. The following section defines the document categories and lists the documents currently available in each category.

- *Kintana Business Application Guides*
- *User Guides*
- *Kintana Application Reference Guides*
- *Kintana Instance Administration Guides*
- *External System Integration Guides:*
- *Kintana Solution Guides*
- *Kintana Accelerator Guides*

Kintana Business Application Guides

Provides instructions for modeling your business processes in Kintana. These documents contain process overviews, implementation instructions, and detailed examples.

- Configuring a Request Resolution System (Create)
- Configuring a Deployment and Distribution System (Deliver)
- Configuring a Release Management System
- Configuring the Kintana Dashboard
- Managing Your Resources with Kintana
- Kintana Reports

User Guides

Provides end-user instructions for using the Kintana products. These documents contain comprehensive processing instructions.

- Processing Packages (Deliver) User Guide

- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide
- Navigating the Kintana Workbench:
  Provides an overview of using the Kintana Workbench
- Navigating Kintana:
  Provides an overview of using the Kintana (HTML) interface

Kintana Application Reference Guides

Provides detailed reference information on other screen groups in the Kintana Workbench. Also provides overviews of Kintana's command usage and security model.

- Reference: Using Commands in Kintana
- Reference: Kintana Security Model

- Workbench Reference: Deliver
- Workbench Reference: Configuration
- Workbench Reference: Create
- Workbench Reference: Dashboard
- Workbench Reference: Sys Admin
- Workbench Reference: Drive
- Workbench Reference: Environments

Kintana Instance Administration Guides

Provides instructions for administrating the Kintana instances at your site. These documents include information on user licensing and archiving your Kintana configuration data.

- Kintana Migration
- Kintana Licensing and Security Model

External System Integration Guides:

Provides information on how to use Kintana's open interface (API) to access data in other systems. Also discusses Kintana's Reporting meta-layer which can be used by third party reporting tools to access and report on Kintana data.

- Kintana Open Interface

Kintana Solution Guides

Provides information on how to configure and use functionality associated with the Kintana Solutions. Each Kintana Solution provides a User Guide for instructions on end-use and a Configuration Guide for instructions on installing and configuring the Solution.

Kintana Accelerator Guides

Provides information on how to configure and use the functionality associated with each Kintana Accelerator. Kintana Accelerator documents are only provided to customers who have purchased a site-license for that Accelerator.

Note

Kintana provides documentation updates in the Download Center section of the Kintana Web site (http://www.kintana.com/support/download/download_center.htm).

A username and password is required to access the Download Center. These were given to your Kintana administrator at the time of product purchase. Contact your administrator for information on Kintana documentation or software updates.

Kintana Services

Kintana is a strategic partner to its clients, assisting them in all aspects of implementing a Kintana technology chain - from pilot project to full implementation, education, project turnover, and ongoing support. Our Total Services Model tailors solution and service delivery to specific customer needs, while drawing on our own knowledgebank and best practices repository. Learn more about Kintana Services from our Web site:

http://www.kintana.com/services/services.shtml

Kintana Education

Kintana has created a complete product training curriculum to help you achieve optimal results from your Kintana applications. Learn more about our Education offering from our Web site:

http://www.kintana.com/services/education/index.shtml

Kintana Support

Kintana provides web-based interactive support for all products in the Kintana product suite via Contori.

http://www.contori.com

Login to Contori to enter and track your support issue through our quick and easy resolution system. To log in to Contori you will need a valid email address at your company and a password that will be set by you when you register at Contori.

Chapter 2

Key Concepts and Definitions

The following sections define the common concepts and terms related to the Kintana Demand Management Solution. Knowledge of these terms will help the reader gain a more thorough understanding of Kintana Demand Management usage.

The following entities are discussed:

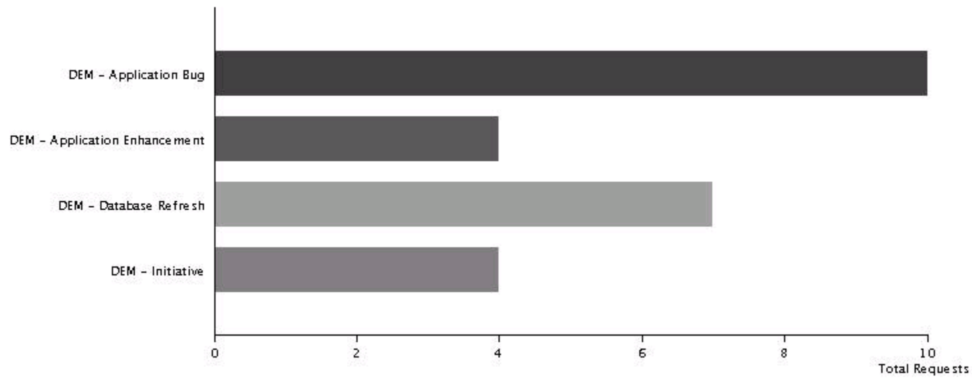
- *Demand*
- *Demand Types*
- *Demand Fields (Categories)*
- *Demand Set*
- *Demand Disposition*
- *Portlet*
- *Personalization*
- *Managing Demand*
- *SLA*
- *Templates*

Demand

Demand is the body of schedulable work placed onto your group or organization. Kintana Demand Management focuses on the Demand that impacts IT organizations. For example, Kintana can be used to track and manage the demand on the IT group for Database refreshes or software application bugs.

Demand Types

Kintana can be used to track and manage different types of Demand. These Demand Types can range from Bug Fix Requests to Requests for New Initiatives. Demand Types in Kintana Demand Management correspond to specific Request Types that your organization has decided to manage using Demand Management.



Demand Fields (Categories)

In order to successfully consolidate Demand across an organization's wide range of activities, you must track commonalities across the different types of demand. This is done by including common fields that can be normalized in each of the Demand Types. The fields that are common to all Demand Types are referred to as Demand Fields. In addition to providing a consistent, normalizeable set of Demand criteria, Demand Fields are also used to provide the user with visibility into their demand. For example, the Demand Fields are used as filters in the Demand Management portlets.

Demand Set

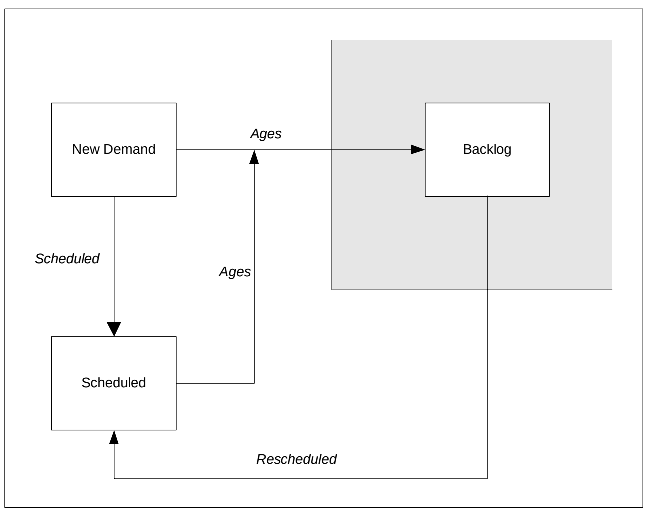
A Demand Set is a self-contained configuration for Demand Management that allows multiple groups to manage demand unique to their business needs. A

Demand Set includes a set of Request Types to be tracked as demand. Each Demand Set can also uniquely define the Request Type field to Demand Field mapping. When analyzing or managing demand in Kintana, you can select a Demand Set that has been configured specifically for the needs of your group.

See *"Demand Management Configuration Guide"* for details.

Demand Disposition

Demand Disposition represents the state of the demand. Demand can be categorized as new, backlog, or scheduled during the resolution process. The following figure illustrates how demand can proceed through the new, scheduled and backlog states.



Portlet

Portlets are configurable, role-based visual displays that provide relevant summary information of your business data. Multiple portlets can be displayed on a single HTML page. 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 specifically 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.

Kintana features a set of portlets for Demand Management. These portlets are designed to provide the most efficient and flexible access to your Demand Management data:

- *"Consolidated Demand"* on page 21
- *"Demand List"* on page 22
- *"Demand by Category"* on page 22
- *"SLA Exception Roll Up"* on page 22
- *"Assignment Queue"* on page 23

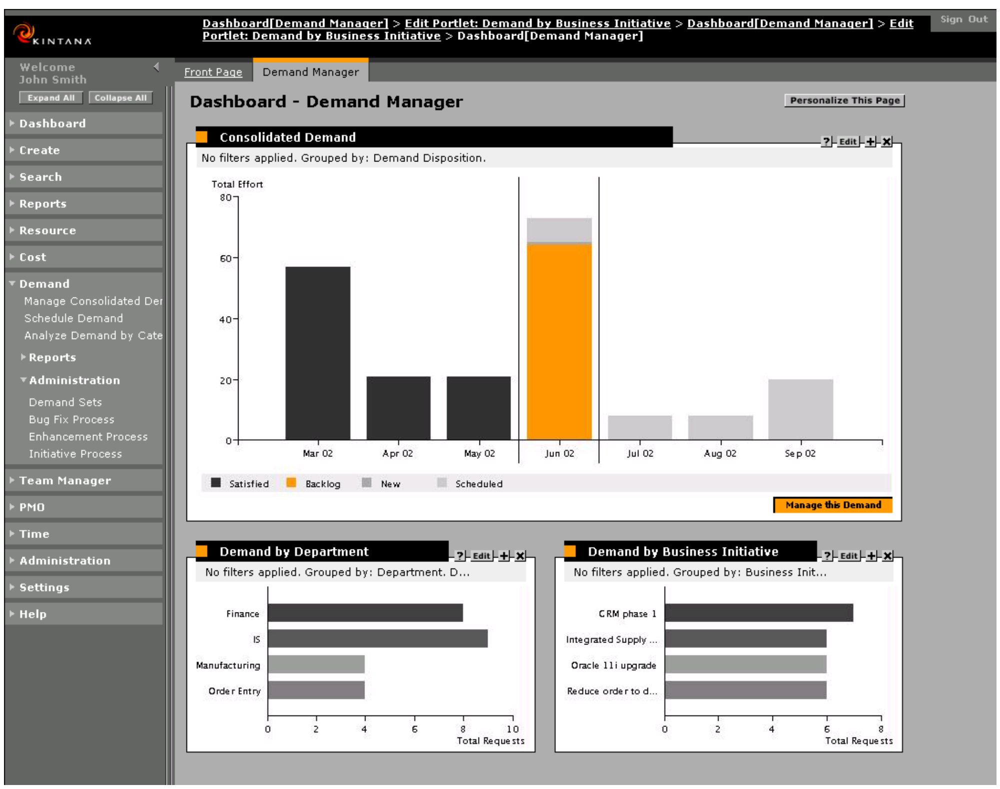


Figure 2-1 Kintana Home Page

Personalization

The Kintana Dashboard can be personalized to show data that is relevant only to the logged-on user. Users can select which portlets are displayed on their own Dashboard pages and filter for appropriate information in each portlet. For example, a CIO may select to display the Consolidated Picture of Demand portlet, displaying a summary view of all the Demand placed on his organization.

Additionally, users can add multiple pages (tabs) to their Dashboard, each one consisting of different portlets. Kintana recognizes your logon information and remembers which portlets you have decided to display as well as the filtering information for each selected portlet. Using the above example, each time the CIO logs onto Kintana, he will see the Consolidated Picture of Demand portlet.

Managing Demand

Kintana automatically consolidates the Demand for all of the Demand Types within your selected Demand Set, graphically illustrating all Demand placed on your organization. Using the Kintana interface, you can manage this consolidated Demand. Kintana allows you to schedule when you will work on blocks of Demand. You can also choose to not address (Reject) specific Demand.

SLA

Kintana Demand Management tracks and reports on a predefined set of Service Level Agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time for items being managed using Demand Management. The SLAs are defined on the Request Type.

Templates

Users can import templates into their Kintana Dashboard. These templates are added as a new page (tab) on your Dashboard. Each template can consist of one or more Dashboard pages. Once imported, the user can personalize the pages to suit his specific business needs; for example, add, delete or personalize portlets.

Chapter

3

Demand Management User Interface Overview

Kintana features both a Workbench (Java) and an HTML interface for managing the demand placed on your IT department. Demand Management takes advantage of the full power of the Kintana suite, using the Kintana (HTML) interface for processing, managing and analyzing Demand, and using the Kintana Workbench to configure Demand-related processes and infrastructure.

The following sections describe the unique features of the Demand Management interface. The end use of standard Kintana features, including the Kintana Dashboard, are discussed in the Kintana user guides.

The following interface features are discussed:

- *Demand Management Menu*
- *Demand Management Portlets*
- *Included Content*

See the following documents for additional information on using the Kintana interface:

- *"Using the Kintana Dashboard"*
- *"Processing Requests"*

Demand Management Menu

The Demand Management solution features two menu groups for analyzing and managing your demand:

- **DEMAND:**
  Enables users to manage, schedule and analyze demand as well as administer the demand management processes.

- **TEAM MANAGER**
  Enables users to manage, schedule and analyze demand for their team.

Users with a Demand Management license and appropriate access grants will have access to these menus. *Table 3-1* defines the menu items that are installed with the default shipment of the Kintana Demand Management solution.

> **Note** These menu items may vary slightly depending on on-site configuration during Demand Management installation.

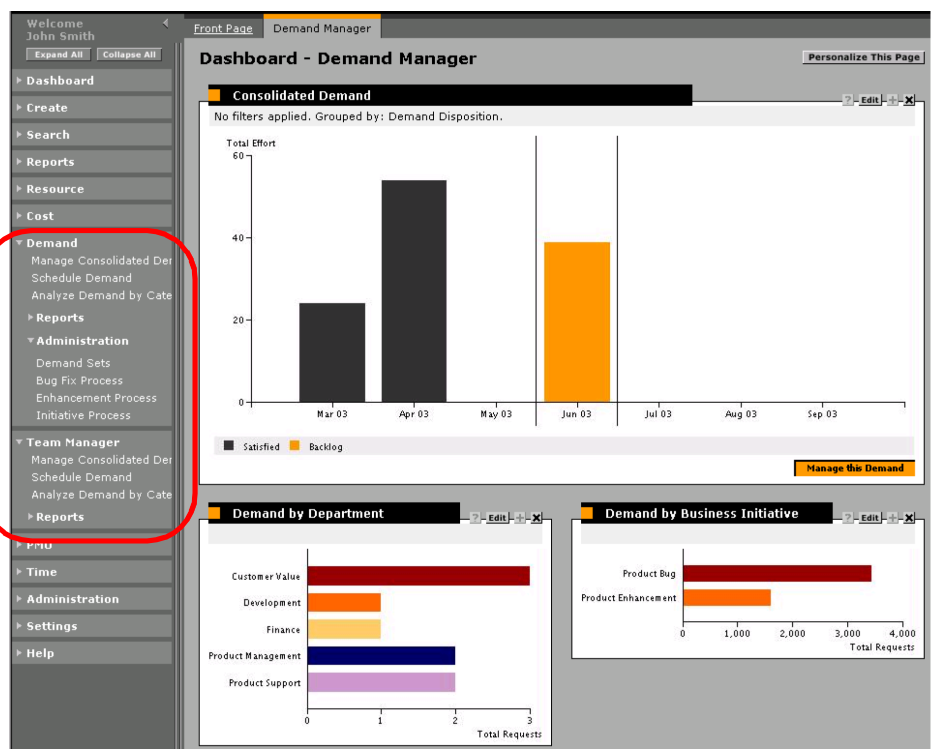


Figure 3-1 Demand Management Menus

Table 3-1. Default Demand Menu

Menu Group	Menu Item	Description
Demand	Manage Consolidated Demand	Opens the Consolidated Demand page where you can analyze the demand on your organization. You can also click on the graph to schedule a portion of the demand.
	Schedule Demand	Opens the Schedule Demand page where you can schedule when the demand will be fulfilled. You can also select to Reject the demand.
	Analyze Demand by Category	Opens the View Demand by Category page where you can analyze the current demand using a set of filters and display parameters.
Reports	Demand Creation History	Opens the DEM - Demand Creation History Report page, where you can specify filter criteria and submit the report.
	Satisfied Demand History	Opens the DEM - Satisfied Demand History page, where you can specify filter criteria and submit the report.
	Historical SLA Violations	Opens the DEM - Historical SLA Violations page, where you can specify filter criteria and submit the report.
Administration	Demand Sets	Opens the page for configuring Demand Sets in Kintana. This includes adding Request Types to your Demand Sets and mapping Demand Fields to Request Type fields.
	Bug Fix Process	Opens the Workflow window for the DEM - Bug Request Workflow in the Kintana Workbench. *Note: you must have a power license to access the Kintana Workbench.*
	Enhancement Process	Opens the Workflow window for the DEM - Enhancement Request Process Workflow in the Kintana Workbench. *Note: you must have a power license to access the Kintana Workbench.*
	Initiative Process	Opens the Workflow window for the DEM - Project Initiative Process Workflow in the Kintana Workbench. *Note: you must have a power license to access the Kintana Workbench.*

Table 3-2. Default Team Manager Menu

Menu Group	Menu Item	Description
Demand	Manage Consolidated Demand	Opens the Consolidated Demand page where you can analyze the demand on your organization. You can also click on the graph to schedule a portion of the demand.
	Schedule Demand	Opens the Schedule Demand page where you can schedule when the demand will be fulfilled. You can also select to Reject the demand.
	Analyze Demand by Category	Opens the View Demand by Category page where you can analyze the current demand using a set of filters and display parameters.
Reports	Demand Creation History	Opens the DEM - Demand Creation History Report page, where you can specify filter criteria and submit the report.
	Satisfied Demand History	Opens the DEM - Satisfied Demand History page, where you can specify filter criteria and submit the report.

Manage Consolidated Demand Page

The MANAGE CONSOLIDATED DEMAND page provides a graphical view of the Demand placed on your organization. Click on the different elements of the graph to schedule that Demand element. You can also use this page to graphically analyze your Demand. Simply select the Demand Set, desired filters, a time-frame, and specify a grouping. Click **APPLY** to see the newly-organized version of your data.

Note

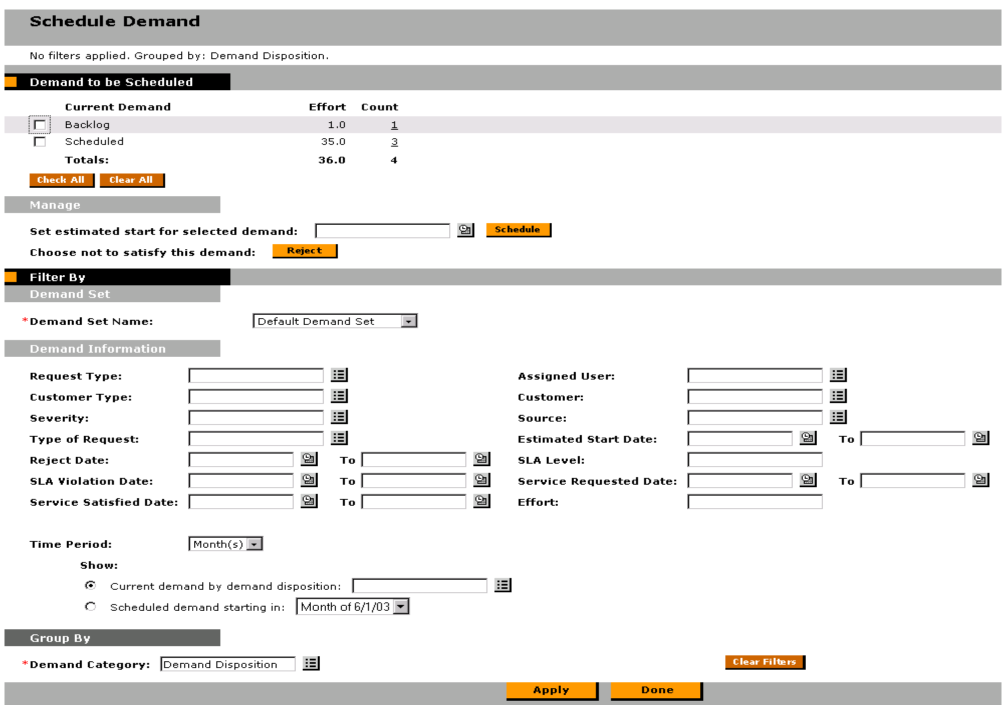
The new graphical representation of your Demand will not be updated in the CONSOLIDATED PICTURE OF DEMAND portlet.

See *"Managing Demand"* on page 35 for detailed information on scheduling and rejecting Demand.

Schedule Demand

The SCHEDULE DEMAND page is used to schedule or reject demand. This window can be accessed by clicking on the graph on the MANAGE CONSOLIDATED DEMAND page, or by selecting **DEMAND -> SCHEDULE DEMAND** from the menu. This window consists of four sections:

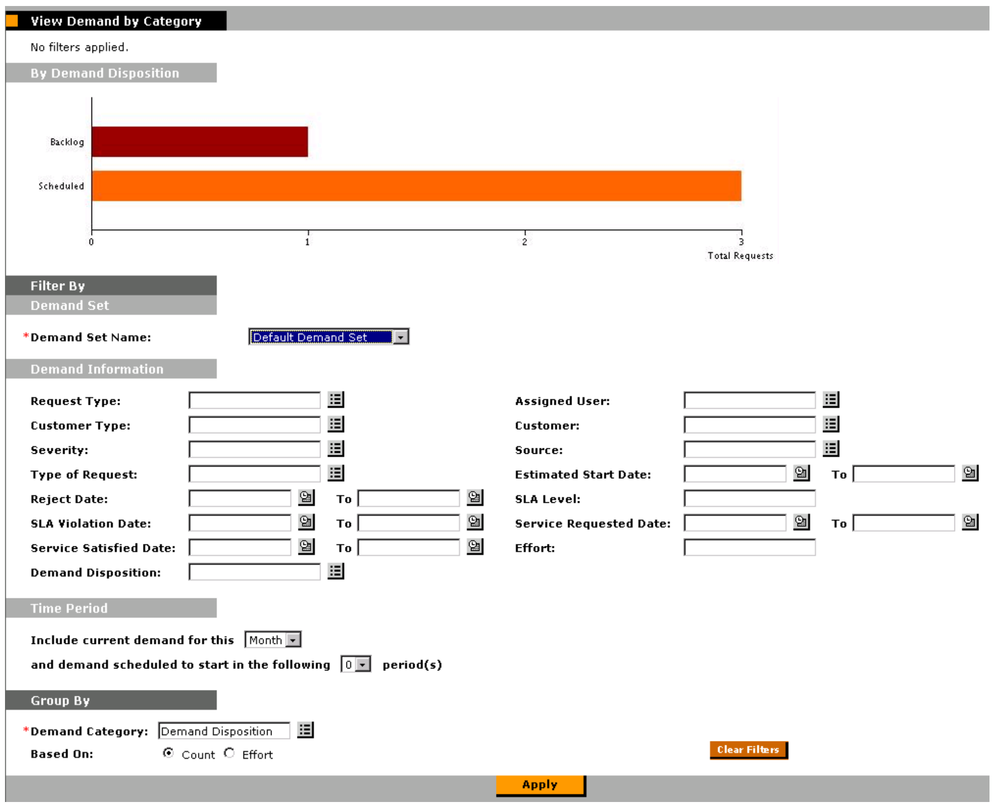
- DEMAND TO BE SCHEDULED - Lists the Demand items to be scheduled. If you select an item on the Manage Consolidated Demand page, only the select Demand item will be displayed.
- MANAGE - Select to schedule the demand for a specific start date, or reject the demand.
- FILTER BY - You can select to view the demand associated with an alternate Demand Set. You can also enter filter criteria in the DEMAND INFORMATION section and click **APPLY** to display a smaller, more focused, number of items in the DEMAND TO BE SCHEDULED section.
- GROUP BY - Specify how the Demand should be listed in the DEMAND TO BE SCHEDULED section.



See *"Scheduling Demand"* on page 37 for detailed instructions.

Analyze Demand by Category

The VIEW DEMAND BY CATEGORY page is used to filter and analyze your demand data. You can select to view the demand associated with an alternate Demand Set by selecting another set from the DEMAND SET field. You can then enter filter criteria and click **APPLY** to graphically display a smaller, more focused, number of items. You can also specify the GROUP BY, which will update the graph with the appropriate Demand Category presentation. The image on this page can be copied and pasted into presentations.



See *"Analyzing Demand"* on page 32 for instructions.

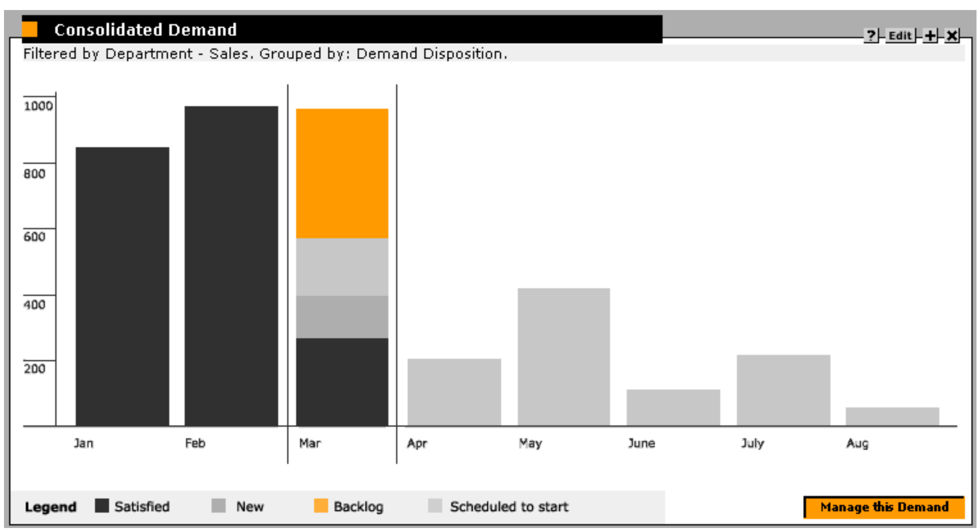
Demand Management Portlets

Demand Management introduces a number of specialized portlets to your Kintana Dashboard. The following portlets can be added to any existing or new Dashboard page in the Kintana HTML interface:

- *Consolidated Demand*
- *Demand List*
- *Demand by Category*
- *SLA Exception Roll Up*
- *Assignment Queue*

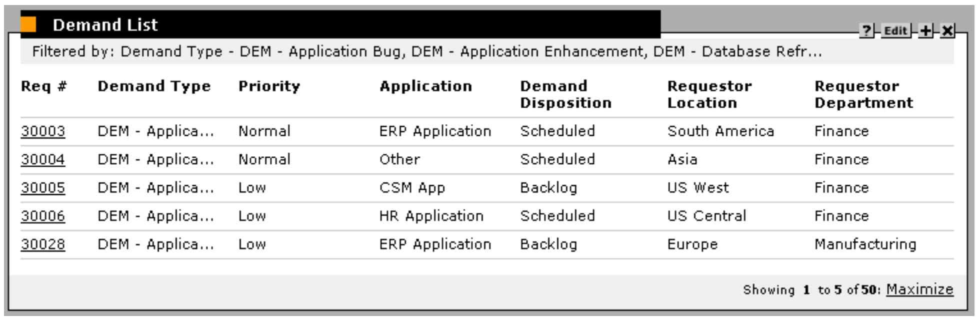
Consolidated Demand

The CONSOLIDATED DEMAND portlet provides a graphical overview of the Demand placed on your organization. Click the **MANAGE THIS DEMAND** button to access the *Manage Consolidated Demand Page* where you can alter the data graphically and access the scheduling functionality.



Demand List

The DEMAND LIST portlet provides a personalizable list of the demand placed on an organization or individual. The DEMAND LIST portlet can be personalized to display demand filtered based on specified criteria (Demand Type, Priority, Demand Disposition, etc.) You can also specify how the demand is grouped and which columns should be included in the portlet's display.


Demand List

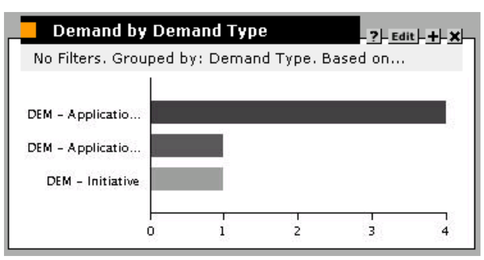
Filtered by: Demand Type - DEM - Application Bug, DEM - Application Enhancement, DEM - Database Refr...

Req #	Demand Type	Priority	Application	Demand Disposition	Requestor Location	Requestor Department
30003	DEM - Applica...	Normal	ERP Application	Scheduled	South America	Finance
30004	DEM - Applica...	Normal	Other	Scheduled	Asia	Finance
30005	DEM - Applica...	Low	CSM App	Backlog	US West	Finance
30006	DEM - Applica...	Low	HR Application	Scheduled	US Central	Finance
30028	DEM - Applica...	Low	ERP Application	Backlog	Europe	Manufacturing

Showing 1 to 5 of 50: Maximize

Demand by Category

The DEMAND BY CATEGORY portlet provides a quick view into different areas of your Demand. This portlet provides a quick, graphical Demand summary and can be grouped by Department, Demand Type, Priority, etc. You can also select whether the portlet displays the grouped information based on number of Demand entries within a specific grouping (Count) or the consolidated Effort of the grouped Demand.

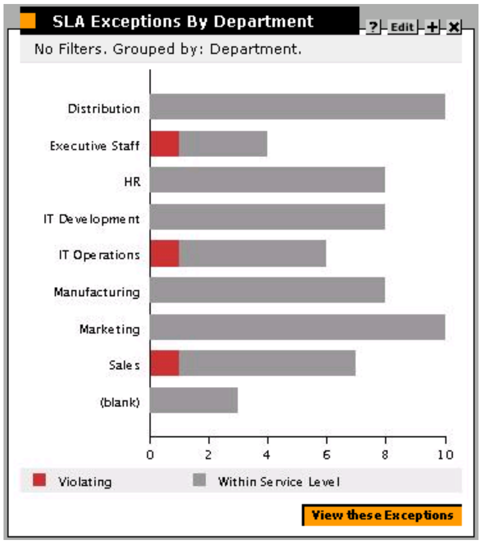


SLA Exception Roll Up

The SLA EXCEPTION ROLL UP portlet lists the open Requests that have triggered SLA exceptions. The Service Level Agreements are configured using Request

Type rules. The portlet displays the active SLAs related to your Demand, highlighting the violations in red. Click the **View These Exceptions** button to see a list of the violating Requests.

The SLA information can be grouped according to your personalized needs: Department, Application, Demand Type, etc.

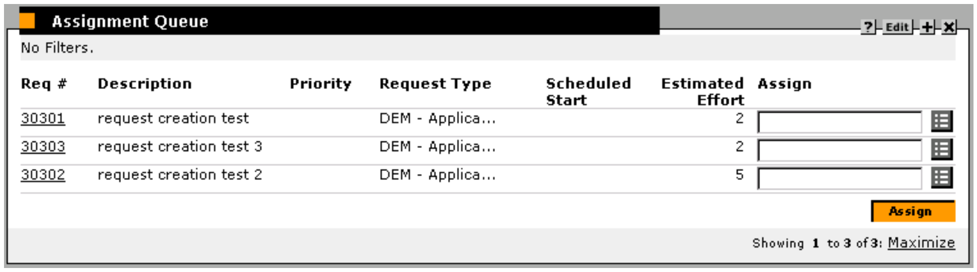


Note

Run the Historical SLA Violations report to view a historical account of all SLA exceptions.

Assignment Queue

The Assignment Queue portlet provides a personalizable view into the Demand that has not been assigned to a resource. You can then use this portlet to assign a Kintana user as a resource to the Request.



Included Content

Kintana Demand Management is shipped with a number of preconfigured Template, Request Types, and Workflows. Each of the preconfigured entities provides an illustration of the Demand Management system and setup. Each entity is summarized below.

Note

> Configurations at your site may be different, depending on the on-site implementation of your specific business needs.

Request Types and Workflow Overview

The following sections provide a quick overview of the Request Types and Workflows that are shipped with Kintana's Demand Management solution. Each of the sections lists the Request Type, Action Name (which appears in the Demand Management menu) and related Workflow. For more details on the associated field details and process, view the entity details (Request Type and Workflow) in the Kintana Workbench.

DEM - Application Bug

Application bugs are used to report problems in current IT applications.

Action Name: Request an Application Bug

Associated Workflow: DEM - Bug Request Workflow

DEM - Application Enhancement

Application Enhancements are used to request new functionality in IT current applications.

Action Name: Request an Application Enhancement

Associated Workflow: DEM - Enhancement Request Process

DEM - Database Refresh

Database refresh requests can be made for all IT Operations applications in the testing phase. Standard IT operation service levels apply.

Action Name: Request a Database Refresh

Associated Workflow: DEM - Database Refresh

DEM - Initiative

Initiative request are used to request key projects for future quarters. Provided approval from key stakeholders, Initiative requests will be reviewed in the third week of each quarter.

Action Name: Request a new Initiative

Associated Workflow: DEM - Project Initiative Process

Demand Management System Templates

Demand Management is shipped with two pre-configured Dashboard templates. Each template consists of a Dashboard page that includes a number of demand-related portlets.

- Demand Manager

  The Demand Manager template provides an overview of the Demand placed on an entire organization. This template includes a number of portlets that provide an overview of the various Demand activities in your organization.

- Team Manager

The Team Manager portlet includes portlets that are preconfigured to display Demand information that is interesting and relevant to the Team Manager responsible for managing his team’s Demand.

Chapter 4
Using Demand Management

The following sections provide instructions for the most common Demand Management user operations. Demand Management users will operate primarily in the Kintana HTML interface -- capturing, managing and reporting on their organizational Demand. Kintana power users can also be involved in managing the Demand processes using the Kintana Workbench. These configuration screens can all be accessed from the Demand menu on the Kintana Dashboard.

This chapter discusses the following topics:

- *Setting Up Your Dashboard*
- *Creating / Capturing Demand*
- *Viewing Demand*
- *Analyzing Demand*
- *Managing Demand*
- *Maintaining Demand Processes*

Note

Many of the Demand Management user functions can be access from the Team Manager menu, also installed with the Demand Management Solution.

Setting Up Your Dashboard

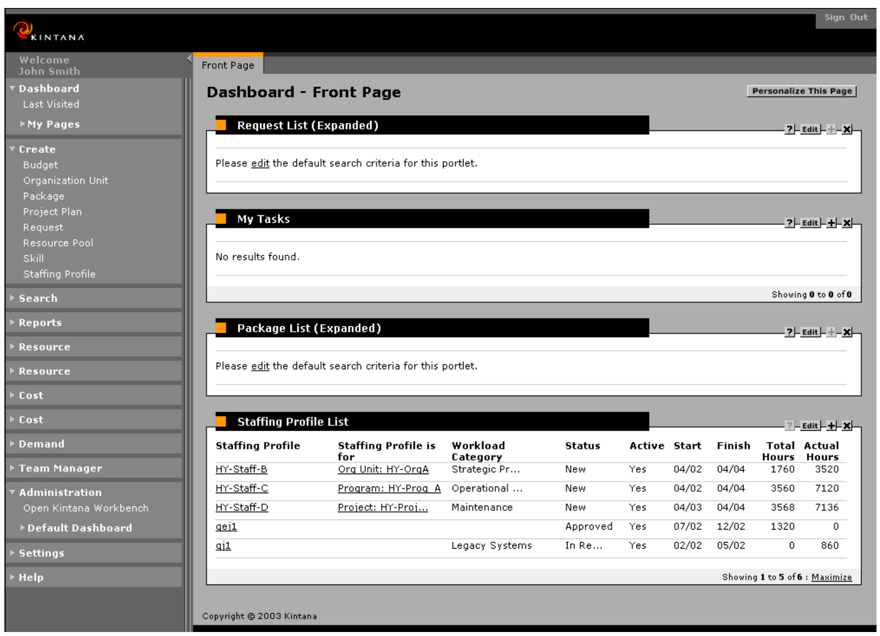
The Kintana Dashboard can be personalized to display information relevant to the logged-on user. Each Kintana user can set up their own Dashboard by creating new Dashboard pages, importing pre-configured templates and personalizing each displayed portlet. The following section provides instructions for importing a Demand Management template onto your Dashboard. For more information on personalizing your Dashboard, see the *"Using the Kintana Dashboard"*.

Importing a Template

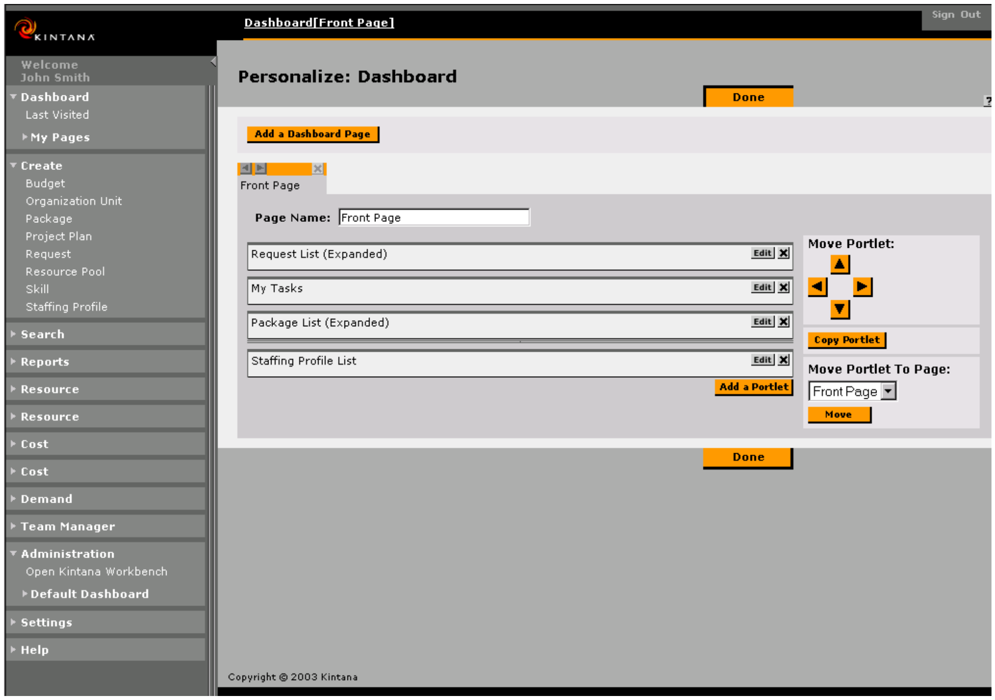
Users can import preconfigured templates onto their Dashboard. The templates consist of one or more Dashboard pages, each including a set of default portlets. The template will appear as a new page on your Kintana Dashboard.

To import a template:

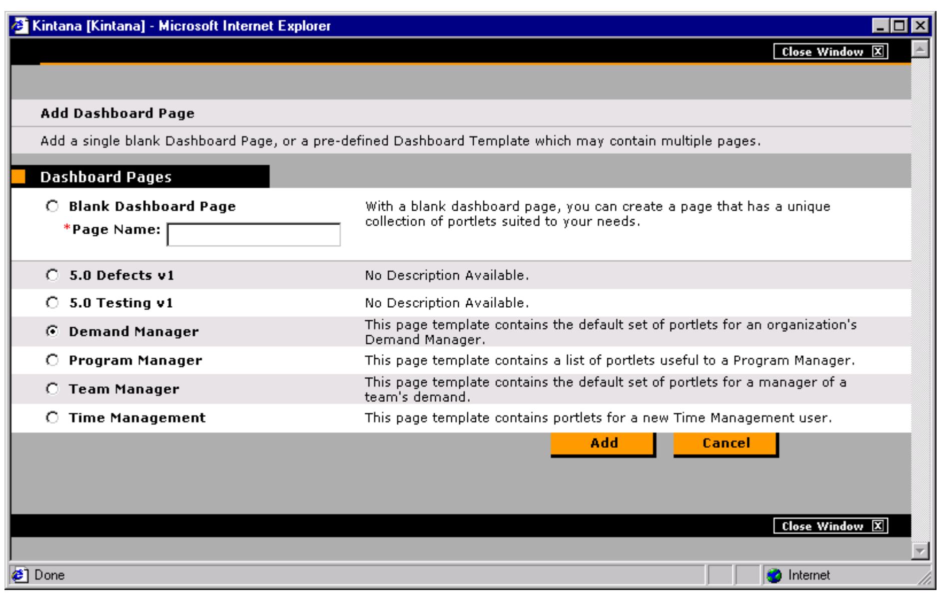
1. Log onto the Kintana Dashboard.



2. Click **Personalize This Page**. The Personalize: Kintana page opens.



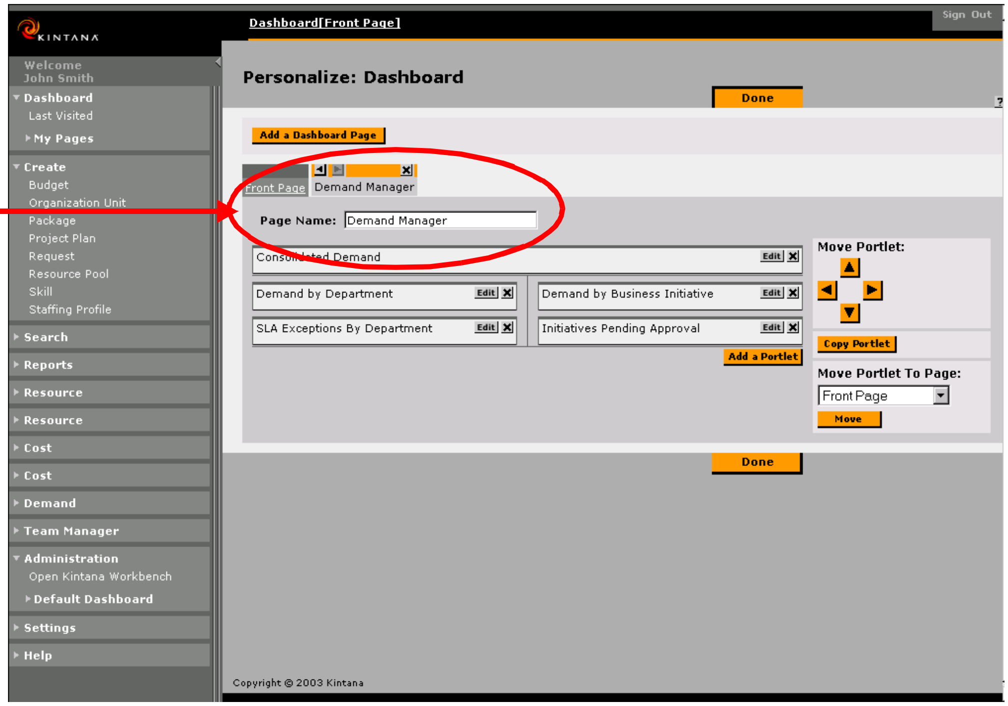
3. Click **ADD A DASHBOARD PAGE.** The ADD DASHBOARD PAGE opens.



4. Select the page that you would like to add to your Dashboard. The Demand Management templates are shown in the above figure.

5. Click **ADD.** The selected page is added to the PERSONALIZE: KINTANA page.

New template is selected.



6. Move the tab to the left by clicking the enabled left arrow button above the tab. You can also delete the template by clicking the **X** button.

7. Click **DONE**.

The template is added as a new page (tab) your Dashboard.

Creating / Capturing Demand

Kintana users can log demand on an organization using the Kintana Dashboard. This newly created demand then proceeds through the resolution process defined in the Kintana Workflow engine.

To create demand in Kintana:

1. Logon to Kintana.

2. Select **CREATE > REQUEST** from the menu.

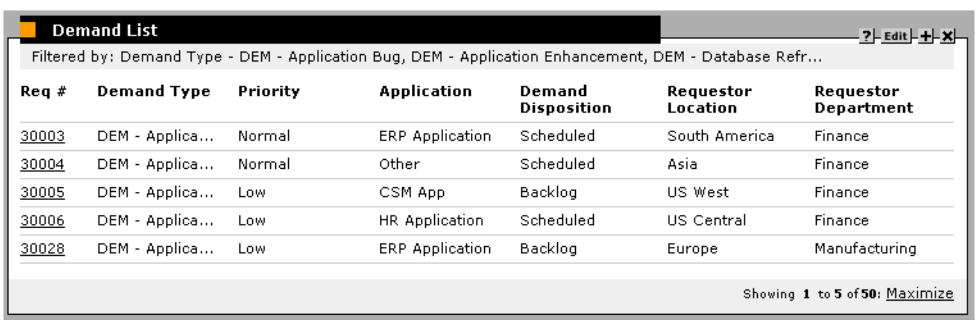
3. Finish creating a Request using the standard Kintana Request creation technique. Requests that have been configured to be tracked as "demand" will appear in Demand Management portlets, reports and analysis tools.

Viewing Demand

You can analyze the Demand on your organization directly from the Kintana Dashboard. You can select to include and personalize a number of Demand Management related portlets on your Dashboard. This will provide an at-a-glance view of relevant Demand-related issues. You can also analyze your Demand using the VIEW DEMAND BY CATEGORY page.

Viewing Lists of Demand (Demand List portlet)

You can configure the DEMAND LIST portlet to display a wide range of Demand related data in a listing format. You can select to filter the information based on a number of parameters. You can also specify how the filtered data is arranged and which columns should be included in the portlet display.



Demand List

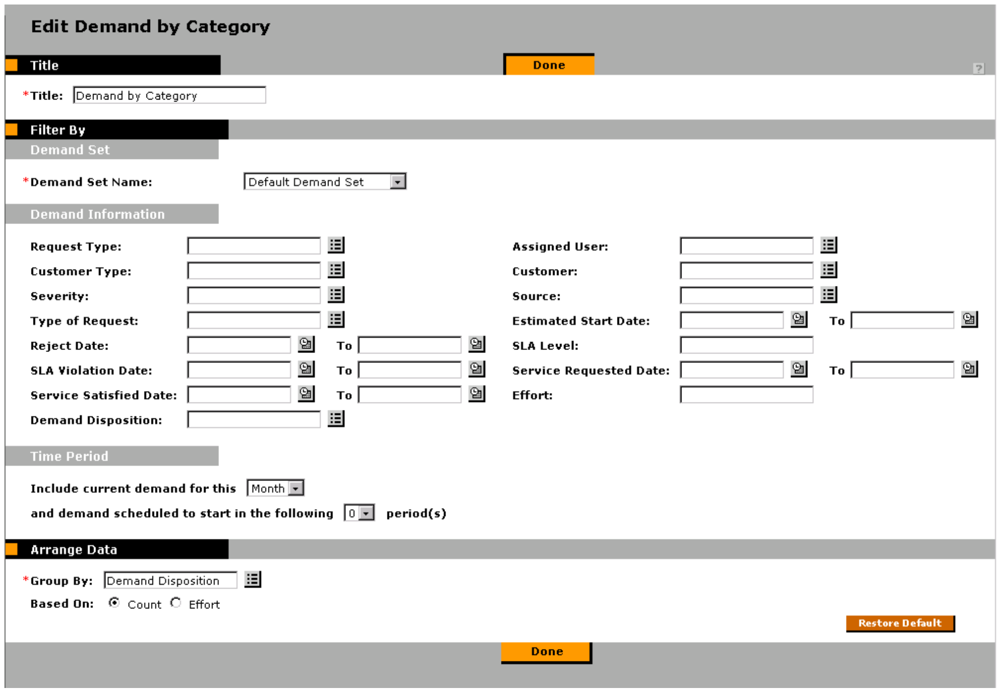
Filtered by: Demand Type - DEM - Application Bug, DEM - Application Enhancement, DEM - Database Refr...

Req #	Demand Type	Priority	Application	Demand Disposition	Requestor Location	Requestor Department
30003	DEM - Applica...	Normal	ERP Application	Scheduled	South America	Finance
30004	DEM - Applica...	Normal	Other	Scheduled	Asia	Finance
30005	DEM - Applica...	Low	CSM App	Backlog	US West	Finance
30006	DEM - Applica...	Low	HR Application	Scheduled	US Central	Finance
30028	DEM - Applica...	Low	ERP Application	Backlog	Europe	Manufacturing

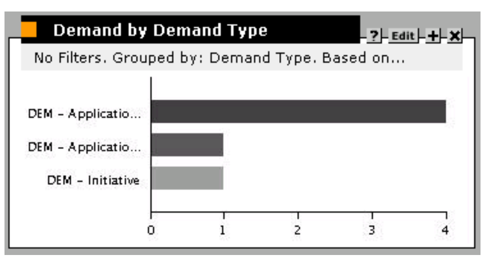
Showing 1 to 5 of 50: Maximize

Viewing Demand by Category

You can configure the CURRENT DEMAND portlet to display a wide range of Demand related data in a graphical format. Use the portlet filter page to select the criteria to limit the data. Also select the category that you want to display.



The personalized portlet appears on your Dashboard.



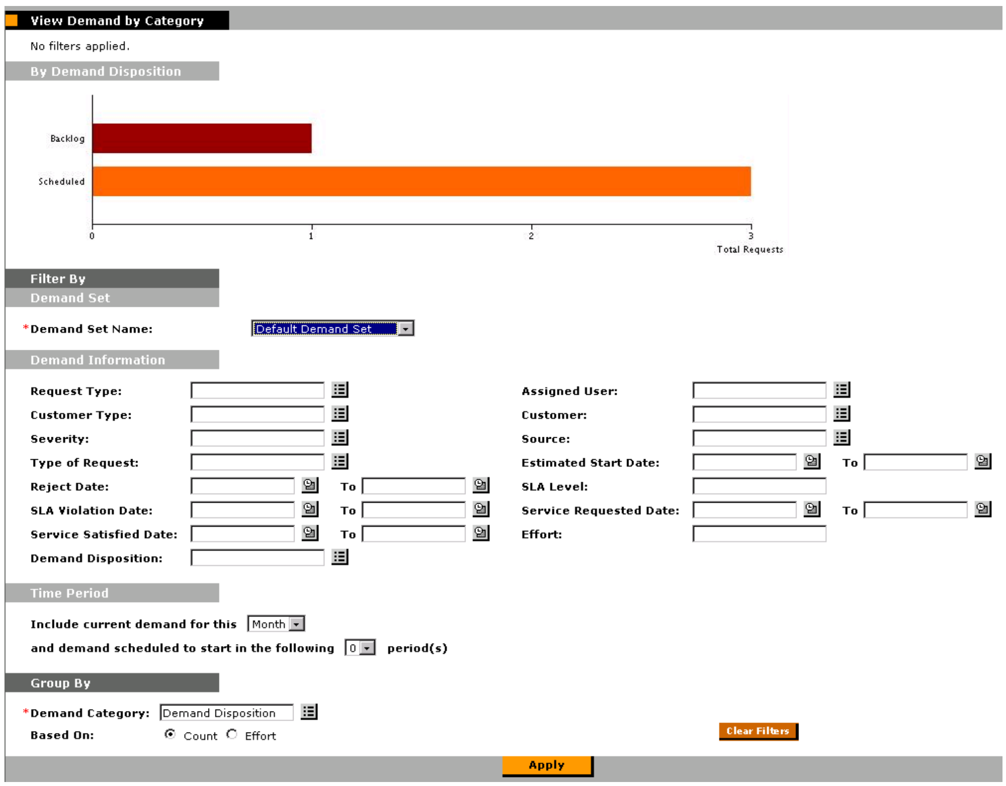
Analyzing Demand

You can analyze your Demand using the VIEW DEMAND BY CATEGORY page. Enter the following information to modify the graphical representation of your Demand:

- Demand Set

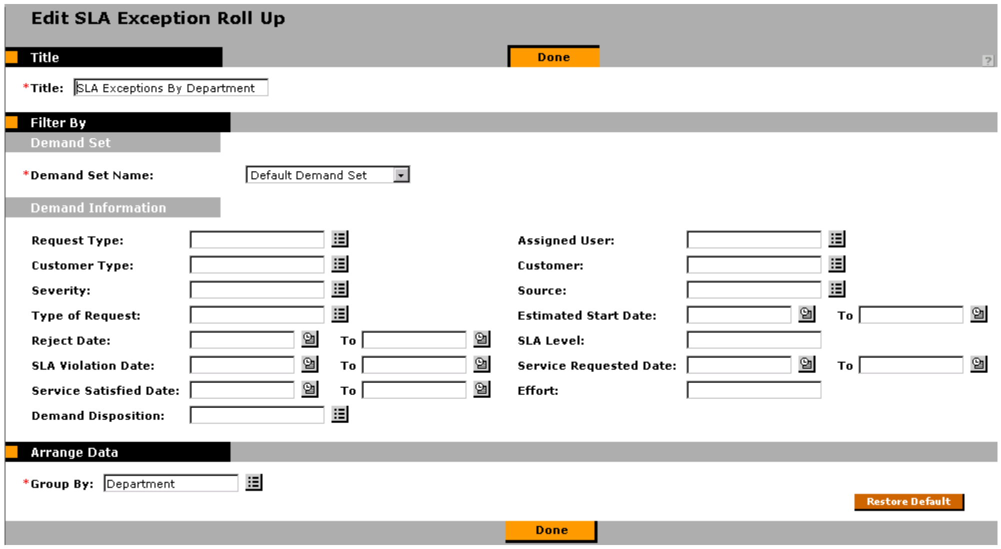
- Filter criteria
- The time period for which you would like to analyze
- Demand Category
- Select Based On count (number of entries) or effort (normalized count)

Click APPLY to update the graphic at the top of the page. You can right-click on the graphic and select to copy it. You can then paste the image into a document or spreadsheet.

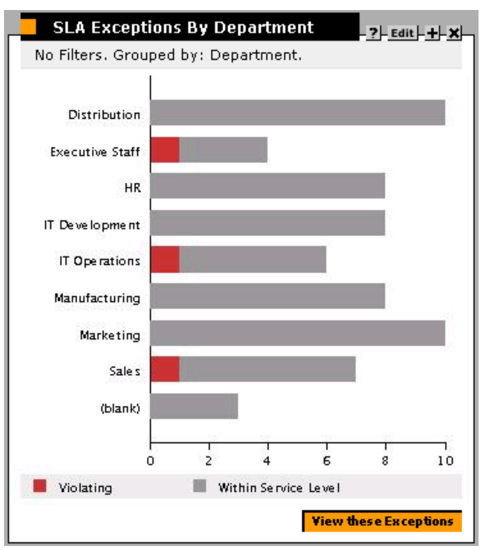


Viewing SLAs

You can include the SLA EXCEPTION ROLL UP portlet on your Dashboard to obtain a graphical representation of the SLA status related to your Demand. Use the EDIT SLA EXCEPTION ROLL UP page to select filter criteria and select how the data is arranged (GROUP BY).



Click **Done** to save the personalization information and display the updated portlet on your Dashboard.



Managing Demand

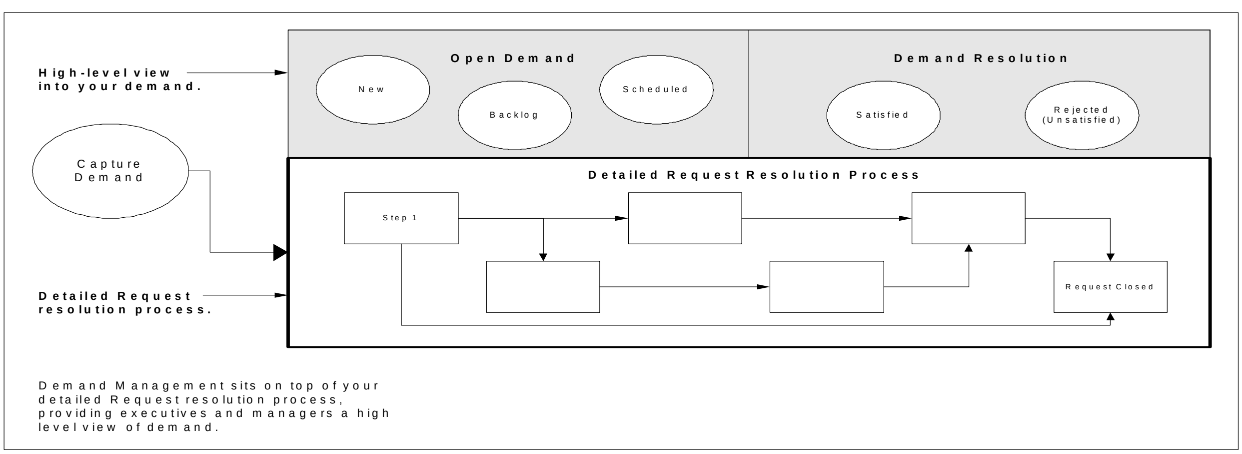
Kintana automatically consolidates the Demand for all of your Demand Types, graphically illustrating all Demand placed on your organization. Using the Kintana interface, you can manage this consolidated Demand. Kintana allows you to schedule when you will work on blocks of Demand. You can also choose to not address (Reject) specific Demand.

The following sections discuss the processes related to managing your demand:

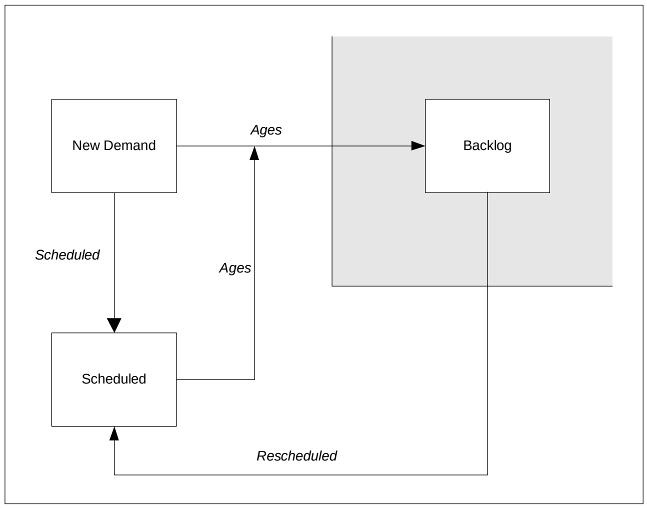
- *Overview - the Life of Demand*
- *Analyzing the Consolidated Demand*
- *Scheduling Demand*
- *Assigning Demand*
- *Rejecting Demand*

Overview - the Life of Demand

Kintana tracks demand on your IT organization. Once created, the demand proceeds through a preconfigured resolution process. Interacting with the resolution process, the demand proceeds through different states and is eventually resolved (satisfied or unsatisfied). The following figures illustrate the demand's interaction with the Request resolution process.



Demand can be categorized as backlog, rejected, or scheduled during the resolution process. The following figure illustrates how demand can proceed through the new, scheduled and backlog states.



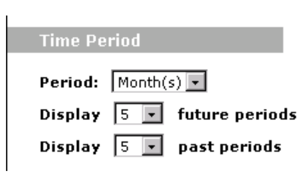
Analyzing the Consolidated Demand

A picture of your consolidated demand is presented in the CONSOLIDATED PICTURE OF DEMAND portlet. To analyze this consolidated demand:

1. Click the **MANAGE THIS DEMAND** button to access the MANAGE CONSOLIDATED DEMAND page. On this page, you can alter the data graphically by selecting different data filters and specifying the grouping of the results.

2. Specify the desired data filters. For example, you may want to limit the results to only display demand of Demand Type "Application Enhancement." To do this, select **DEM - APPLICATION ENHANCEMENT** from the DEMAND TYPE auto-complete list.

3. Select the time period that you want to manage and specify the display period from the Time Period section.



4. Select how you would like the data organized by selecting a value from the GROUP BY drop down list.

5. Click **APPLY**. The graphic at the top of the page is updated with the applied filters and display information. You can change the filter and grouping parameters to view the data in a different way.

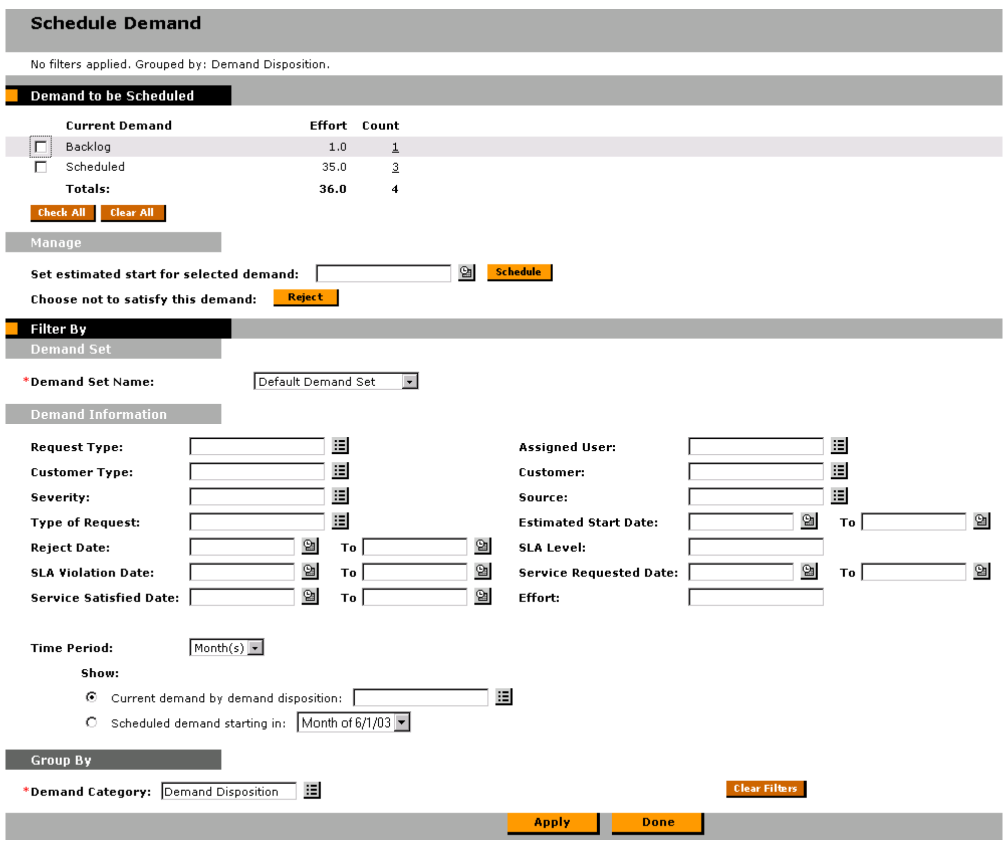
Scheduling Demand

Using Kintana's Demand Management, you can defer demand to start at a later date. To defer your demand:

1. Select **DEMAND -> SCHEDULE DEMAND** from the menu. The SCHEDULE DEMAND page opens.

Note

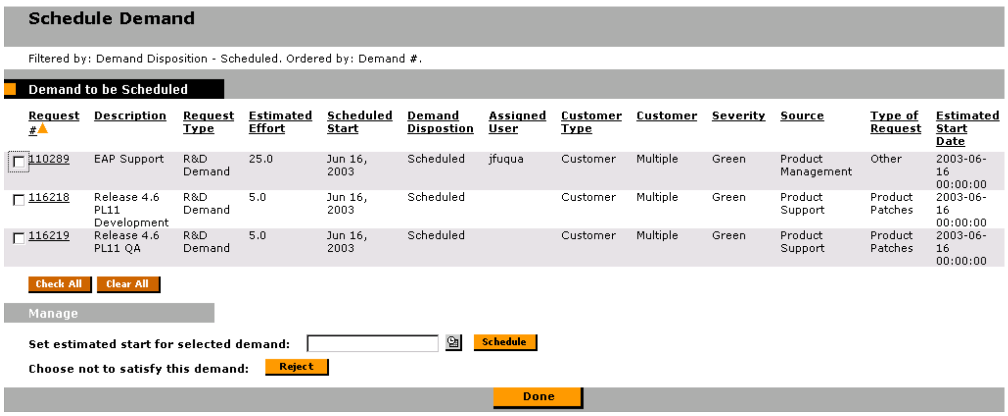
> You can also access the SCHEDULE DEMAND page by clicking on the demand graphic on the MANAGE CONSOLIDATED DEMAND page.



2. Locate the demand to be scheduled. You can use the FILTER BY and GROUP BY sections to limit and organize the displayed demand.

   a. Select the block of DEMAND TO BE SCHEDULED by checking the appropriate CURRENT DEMAND box.

   b. You can also click the linked number in the COUNT column to display a list of the demand included in the block. Select the items that you want to schedule.



Schedule Demand

Filtered by: Demand Disposition - Scheduled. Ordered by: Demand #.

Demand to be Scheduled

Request #	Description	Request Type	Estimated Effort	Scheduled Start	Demand Dispostion	Assigned User	Customer Type	Customer	Severity	Source	Type of Request	Estimated Start Date
110289	EAP Support	R&D Demand	25.0	Jun 16, 2003	Scheduled	jfuqua	Customer	Multiple	Green	Product Management	Other	2003-06-16 00:00:00
116218	Release 4.6 PL11 Development	R&D Demand	5.0	Jun 16, 2003	Scheduled		Customer	Multiple	Green	Product Support	Product Patches	2003-06-16 00:00:00
116219	Release 4.6 PL11 QA	R&D Demand	5.0	Jun 16, 2003	Scheduled		Customer	Multiple	Green	Product Support	Product Patches	2003-06-16 00:00:00

Check All Clear All

Manage

Set estimated start for selected demand: Schedule

Choose not to satisfy this demand: Reject

Done

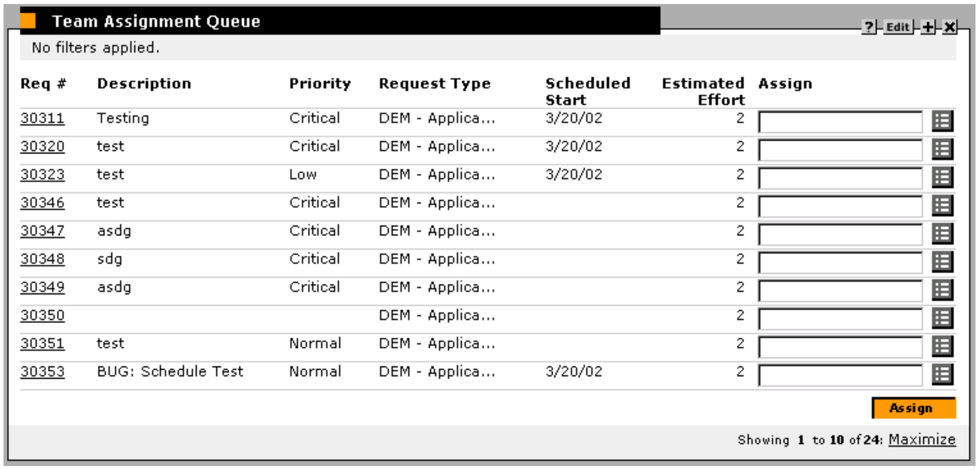
3. Enter a date in the SET ESTIMATED START FOR SELECTED DEMAND: field.

4. Click SCHEDULE.

The selected demand has now been deferred to start on the specified date.

Assigning Demand

You can assign who will be working on the demand using the ASSIGNMENT QUEUE portlet.



Team Assignment Queue

No filters applied.

Req #	Description	Priority	Request Type	Scheduled Start	Estimated Effort	Assign
30311	Testing	Critical	DEM - Applica...	3/20/02	2	
30320	test	Critical	DEM - Applica...	3/20/02	2	
30323	test	Low	DEM - Applica...	3/20/02	2	
30346	test	Critical	DEM - Applica...		2	
30347	asdg	Critical	DEM - Applica...		2	
30348	sdg	Critical	DEM - Applica...		2	
30349	asdg	Critical	DEM - Applica...		2	
30350			DEM - Applica...		2	
30351	test	Normal	DEM - Applica...		2	
30353	BUG: Schedule Test	Normal	DEM - Applica...	3/20/02	2	

Assign

Showing 1 to 10 of 24: Maximize

To assign a user to a demand item:

1. Select a Kintana user from the ASSIGN auto-complete list.

2. Click **ASSIGN**.

The assigned user processes the Request as defined by your Demand Management processes.

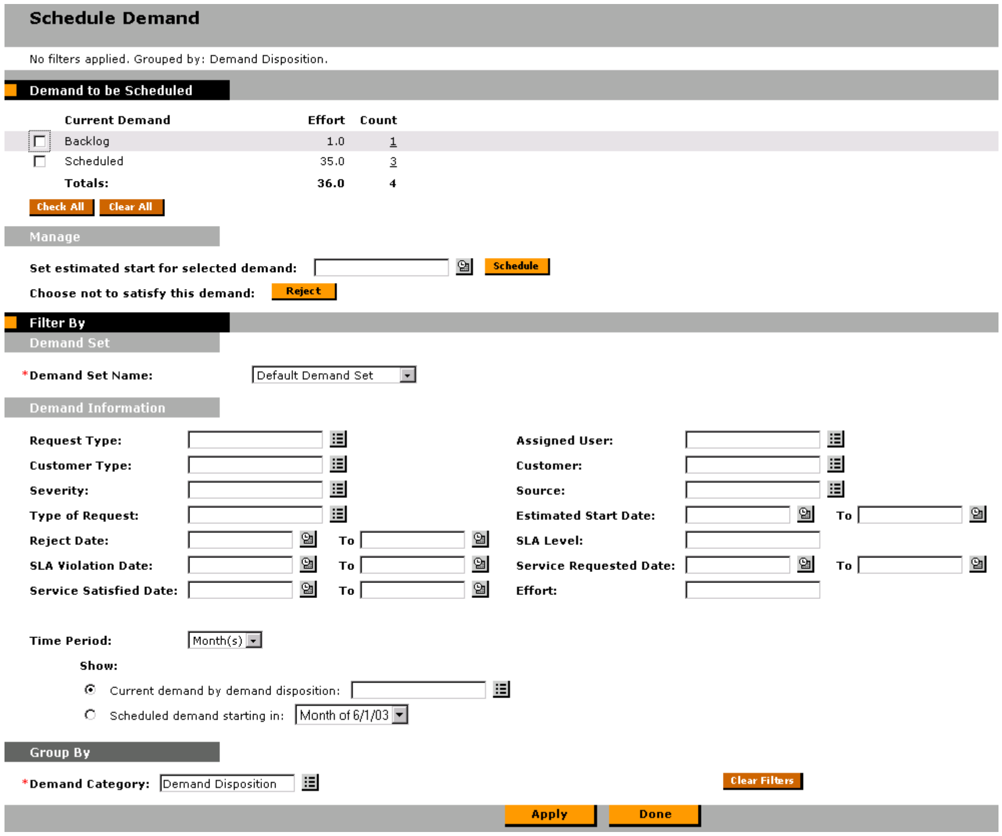
Rejecting Demand

When reviewing your organization's consolidated demand, you may wish not to satisfy one or more requested items. To reject demand:

1. Select **DEMAND -> SCHEDULE DEMAND** from the menu. The SCHEDULE DEMAND page opens.

Note

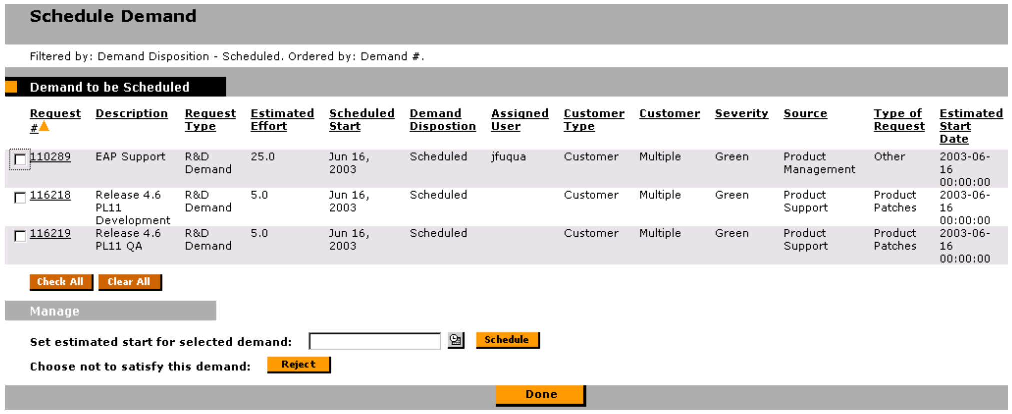
You can also access the SCHEDULE DEMAND page by clicking on the demand graphic on the MANAGE CONSOLIDATED DEMAND page.



2. Locate the demand to be rejected. You can use the FILTER BY and GROUP BY sections to limit and organize the displayed demand.

   a. Select the block of Demand to be rejected by checking the appropriate CURRENT DEMAND box.

   b. You can also click the linked number in the COUNT column to display a list of the demand included in the block. Select the items that you want to reject.



3. Click **Reject**.

Maintaining Demand Processes

Demand processes are configured using Kintana Workflows. Workflows are configured in the Kintana Workbench, and therefore require a Kintana power license to access. Users with the appropriate license can access the Workflow configuration screens directly from the Demand menu in the Dashboard.

To access the Workflow screens to edit the Demand Management processes:

1. Select an item from the **Demand > Administration** menu. Demand Management is shipped with three choices in this list:

Bug Fix Process	Opens the Workflow window for the DEM - Bug Request Workflow in the Kintana Workbench.
Enhancement Process	Opens the Workflow window for the DEM - Enhancement Request Process Workflow in the Kintana Workbench.
Initiative Process	Opens the Workflow window for the DEM - Project Initiative Process Workflow in the Kintana Workbench.

   The Kintana Workbench will open. If you are not currently logged on, you will be prompted to enter your logon information. You will then be taken directly to the appropriate Workflow configuration screen.

2. Update the Workflow and save your changes. For instructions on updating Kintana Workflows, refer to the *"Configuring a Request Resolution System"*.

Chapter 5
Reports

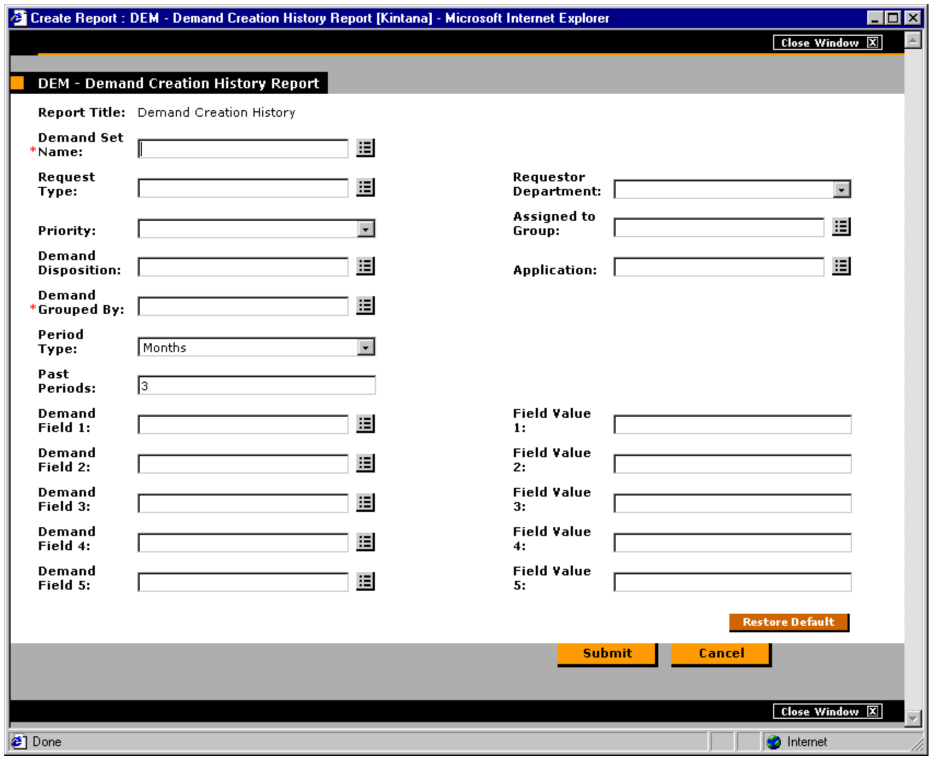
The Kintana Demand Management solution includes three custom reports that can be run directly from the Kintana interface. The menu in the Demand Management template includes links to run these reports. The following reports are available in addition to the other standard Kintana reports:

- Demand Creation History
- Demand Completion History
- Historical SLA Violations

Each report is briefly discussed in the following sections.

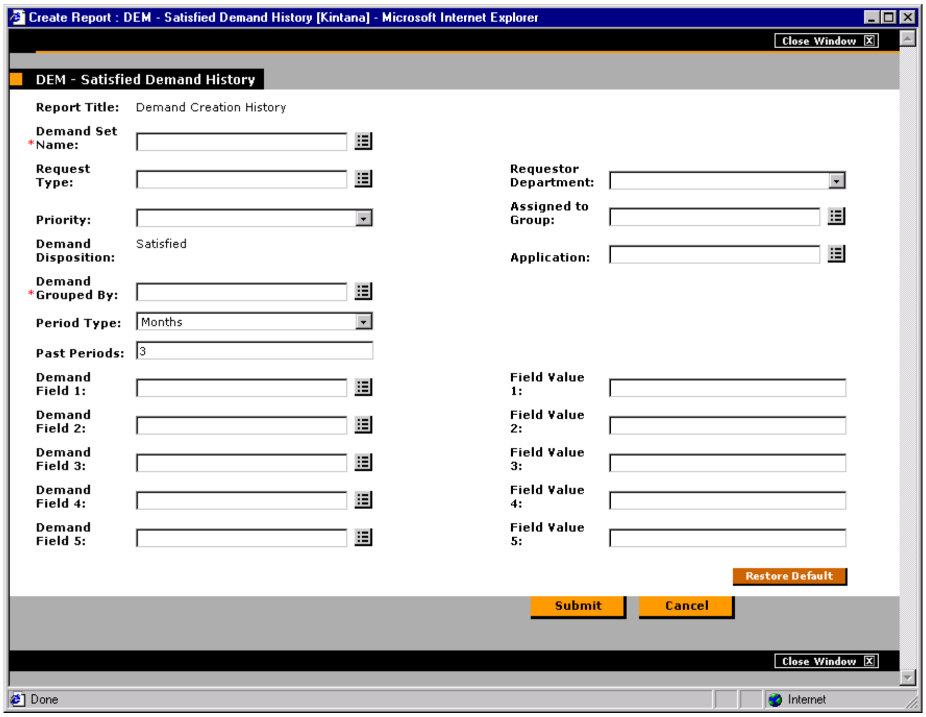
Demand Creation History

The Demand Creation History report provides visibility into when demand was created over time. You can report based on the parameters shown in the below figure.



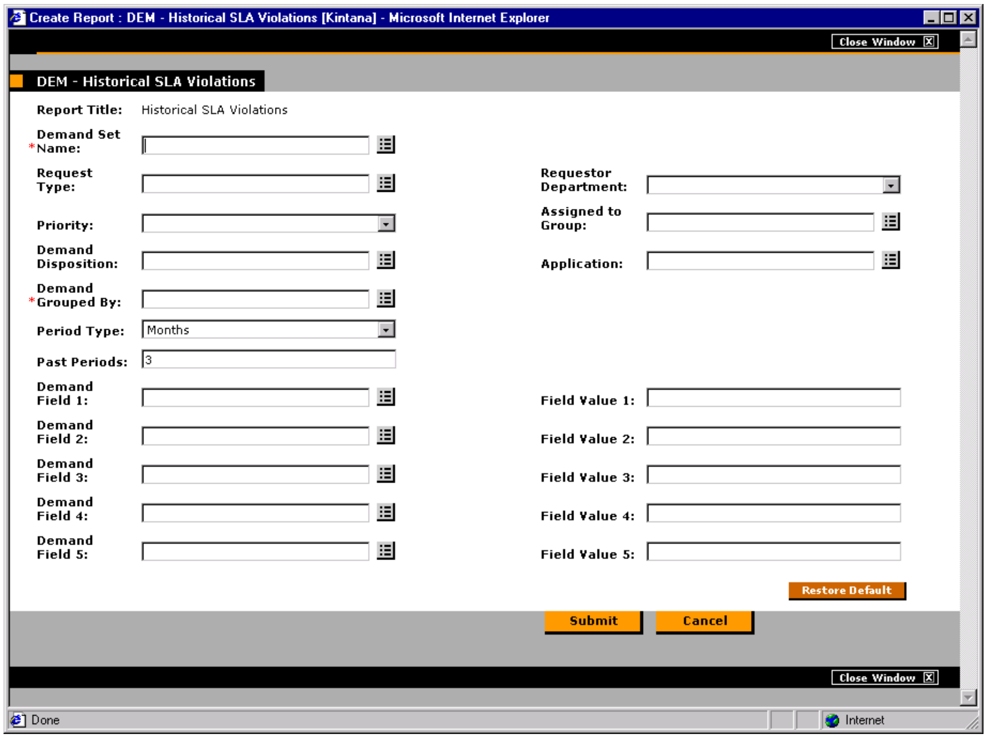
Demand Completion History

The Satisfied Demand History provides visibility into when demand was satisfied over time. You can report based on the parameters shown in the below figure.



Historical SLA Violations

The Historical SLA Violations report provides historical analysis of SLA violations. You can report based on the parameters shown in the below figure.


Create Report : DEM - Historical SLA Violations [Kintana] - Microsoft Internet Explorer
Close Window
DEM - Historical SLA Violations
Report Title: Historical SLA Violations
*Demand Set Name:
Request Type:
Requestor Department:
Priority:
Assigned to Group:
Demand Disposition:
Application:
*Demand Grouped By:
Period Type: Months
Past Periods: 3
Demand Field 1:
Field Value 1:
Demand Field 2:
Field Value 2:
Demand Field 3:
Field Value 3:
Demand Field 4:
Field Value 4:
Demand Field 5:
Field Value 5:
Restore Default
Submit
Cancel
Close Window
Done
Internet

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