Mercury IT Governance Center™

Mercury Demand Management™
User's Guide

Version: 7.0

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Getting Started with Mercury Demand Management

In This Chapter:

Introduction to Mercury Demand Management

Mercury Demand Management™ is the component of Mercury IT Governance Center™ that manages requests from creation to implementation. Each request is processed using a workflow that is represented graphically in the user interface. Demand Management features tools and configurable processes for dealing with these requests. Data is captured by prompting for process(workflow)-specific information to ensure that the required information is collected and validated at the right time in the process.

Demand Management can follow complex business rules by using different approval methods. Email and pager notifications can be generated as the request passes through the various workflow steps. Prioritization and delegation features allow requests to efficiently advance through the workflows applied to them, routing them to the relevant department, group, or individual.

This document contains the following information:

- In Demand Management, requests are the means by which actions and processes are initiated. Requests contain all of the information required to take a series of actions that move requests through a workflow. Chapter 2, *Viewing Requests,* on page 17 presents information about the major features of Demand Management requests.
- In Demand Management, requests are the means by which actions and processes get started. Chapter 3, *Creating Requests,* on page 36 provides details on how to create requests.
- After you create a request, you process and manage it. Chapter 4, *Processing and Managing Requests,* on page 55 provides instructions on how to open and update requests, and how to use reports and portlets to manage them.
- Mercury customers who have both Mercury Demand Management and Mercury Project Management™ can integrate Demand Management's request tracking capability with Project Management's deliverable date and actuals tracking capabilities. Chapter 5, *Integrating Requests and Projects,* on page 71 presents information on how to integrate and work with tasks and requests.
- Demand Management supplies a preconfigured page that demand managers can use to monitor and manage requests. Chapter 6, *Demand Manager Page,* on page 77 provides descriptions of this page and the portlets it displays.

Overview of a Demand Management System

A Demand Management request resolution system is used to track requests from their creation to their resolution. The main components of a request resolution system are requests and workflows.

Requests are the fundamental work unit in Demand Management. When you ask for help, you create a request. When you report a problem, you create a request. When something needs to happen, you create a request.

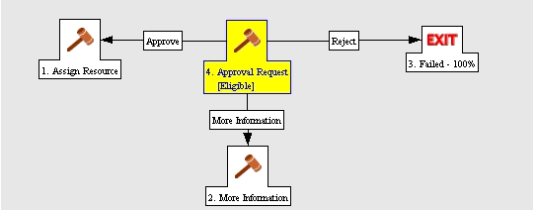
After you create a request, it must follow a process to reach its conclusion. A workflow is the process a request takes to reach its conclusion. Workflows consist of workflow steps, and each workflow step corresponds to a decision or action.

At each workflow step, information can be added to the request or existing information can be updated. For example, you might create an enhancement request to ask for a change to an application. Later in the request resolution process, after the enhancement request is approved, developers are assigned to make the change.

In Mercury IT Governance Center, you use the request detail page to interact with the request. The detail page is where you view all of the information about the request and where you make decisions and take actions that pertain to the request.

After the decision is made or the action completed, the user must manually access the request detail page and select the decision or action. The request then advances to the next step in the workflow at which another user makes a decision or takes an appropriate action.

Figure 1-1. Requests and workflows



Requests, Request Types, and Request Status

The detail page for a request displays all of the information that is required to complete a specific business process. Each request has an associated *request type,* such as the bug request type or the enhancement request type. Request type determines which fields are associated with a request and the workflow.

Request *status* is a summary indicator of the current state of a request. For example, a request can have a request status of New, Assigned, or In Progress. Request status is assigned automatically as the request moves through its workflow. Demand Management comes with Mercury-supplied request types that you can modify to meet your business needs.

Workflows and Workflow Steps

A workflow consists of a logical series of steps that define a process. You can configure a workflow to handle virtually any business process. You can create workflows to automate existing processes, rather than forcing your organization to adopt a fixed set of processes.

Workflow steps are the events that are linked together to form a complete workflow. Demand Management uses the following four types of workflow steps:

- **Decisions.** In decision workflow steps, a user or group must make a decision or take some action, such as approve a request or complete a task. The decision workflow step is manually updated to reflect the decision or action.
- **Executions.** In execution workflow steps, the system performs an action, and then updates the workflow step with the results. These actions can be

as simple as calculating the value for a token or as complex as updating Web pages. Execution workflow steps are automatically updated to reflect the outcome of the action.

- **Conditions.** Condition workflows steps are logic steps, and can include AND/OR statements. Condition workflows steps are used for complex workflow processing, such as are requiring that all inputs reach a workflow step before the process can continue.
- **Subworkflows.** Subworkflow workflow steps are small, self-contained workflows used by the workflow associated with the request.

Request Processing and Data Integrity

Information gathered during request resolution is often required to move a request through its workflow. While some of the information related to a request is available when the request is created, additional information is acquired at different points along the workflow.

To acquire information when it is required at different workflow steps, Mercury Demand Management uses conditional field behavior. Suppose, for example, that you enter a new request. At the outset, a field such as **Assigned User** is not required, and might even be disabled.

At some point in the workflow, however, a user must be assigned to the request. At that workflow step, the user or group working on the problem might be required to fill in the **Assigned User** field. The (now required) field is displayed with a red asterisk. The request cannot progress to the next workflow step until a user is assigned. In fact, the request cannot be saved unless the **Assigned User** field is completed.

Related Documents

Related documents for this document are:

- *Tracking and Managing IT Demand User's Guide*
- *Mercury Demand Management Configuration Guide*
- *Mercury Project Management User's Guide*
- *Reports Guide and Reference*
- *Mercury-Supplied Entities Guide* includes descriptions of all Mercury Demand Management portlets, request types, and workflows.

Chapter

2

Viewing Requests

In This Chapter:

Overview of Demand Management Requests

A Mercury Demand Management request resolution system is used to track requests from creation to resolution. Demand Management requests are highly configurable. As such, actual sections and fields can vary between different request types. Typically, each request type is associated with a unique workflow.

To interact with a request, you use the associated detail page. The detail page for a request contains all of the information about the request. Also, the detail page is where decisions and actions that pertain to the request are executed.

Your Mercury IT Governance Center administrator can use Demand Management to create Request Help content for any of the fields displayed on the details page for the various request types. If your administrator has added Request Help for a field, a **Help** icon (*Figure 2-1*) is visible to the right of that field. To see more detailed information about the field, click this **Help** icon.

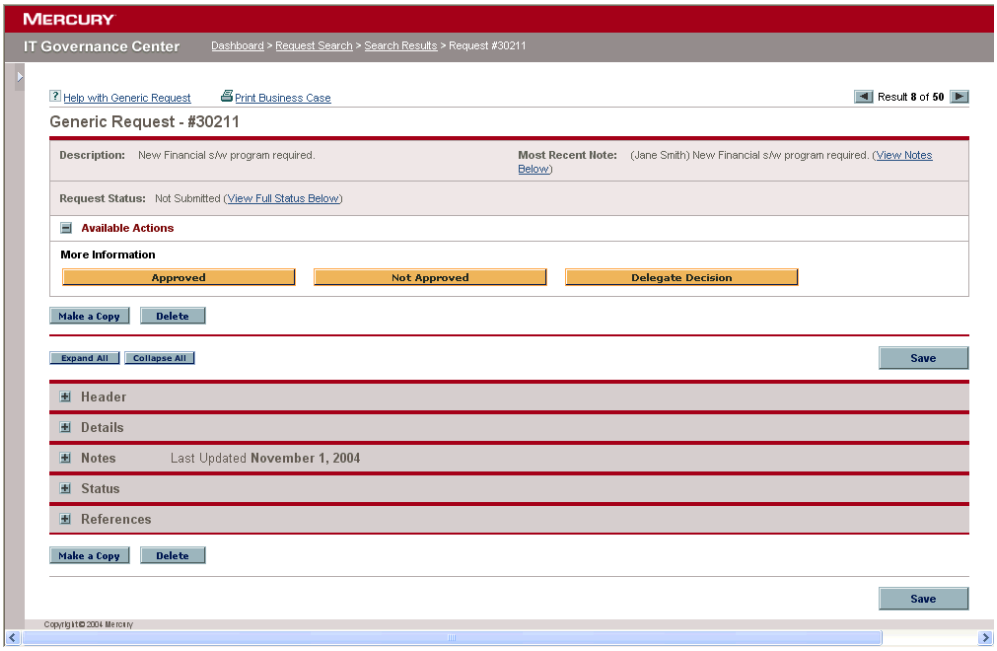
Figure 2-1. Request Help icon

Figure on page 22 shows the detail page for a submitted (existing) request, with its sections minimized. The main sections of the request detail page are as follows:

- The top of the detail page for a request displays the request type, request number, and the **Available Actions** section. The **Available Actions** section, when expanded, displays the actions you can perform on the request at the current workflow step. The information presented in this top area of the detail page is available after a request is created and submitted.
- **Header.** The **Header** section displays general information such as who created the request and on what date, and the request type. As you create a request, you must usually complete some of the fields in the **Header** section. After you submit the request, you can update information in any active fields. The **Header** section is available after a request is created.

- **Details.** The **Details** section displays information specific to the request, such as a description of the problem, the business area affected, and what is required to resolve the request. As you create a request, you must usually complete some fields in the **Details** section. After you submit the request, you can update information in any active fields. The **Details** section is available immediately after the request is created.
- **Notes.** Use the **Notes** section to add notes and to view any existing notes already submitted on the request. You can add notes when you create a request as well as later, after you submit it. The **Notes** section is available immediately after you create a request.
- **Status.** The **Status** section displays request status and is available after you create and submit a request.
- **References.** You use the **References** section to display or add additional information about the request. For example, you can add a document or URL as a reference to a request. The **References** section is available immediately after you create a request.

Figure 2-2. Request detail page, minimized



Opening a Request

There are several ways to open requests in Mercury IT Governance Center. The following procedure provides the steps you use to open a request from the Search Requests page in the standard interface.

To open a request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Demand Management > Search Requests.**

   The Search Requests page opens.
3. In the available fields, enter your search criteria, and then click **Search.**

   The **Request Search Results** section lists the requests that match your search criteria.
4. In the **Req #** column, click the number that corresponds to the request you want to open.

The request detail page opens and displays all of the information related to the selected request.

Request Detail Page, Top Section

The top of the detail page for a request displays the request number, the request type, and the **Available Actions** section. The top section is visible after a request is created and submitted. The title of the request detail page is Request Type - Request # (for example, DEM - Application Bug - #30182).

From the title section, you can:

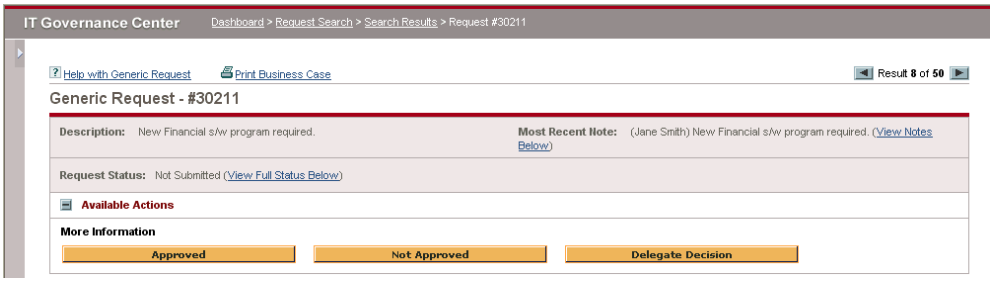
- Perform an available action
- Print the request details
- Save the request
- Make a copy of the request
- Delete the request

- Expand or collapse all sections on the page
- Jump to the **Status** and **Notes** sections

If you have the permissions required to act on the request at the current workflow step, the **Available Actions** section lists the actions you can take. Some actions, such as **Accept** and **Reject,** move the request to another step in the workflow. If you select an action such as **Assign Resource** or **Delegate Decision,** a workflow action page opens to present additional choices. Some actions change optional fields to required.

Reference relationships let you place a request on hold until another request is completed. In these reference relationships, the **Available Actions** section contains the **Override** button. To allow the request to proceed through the workflow, you click **Override.** When a relationship is overridden, the change is reflected in the **References** section.

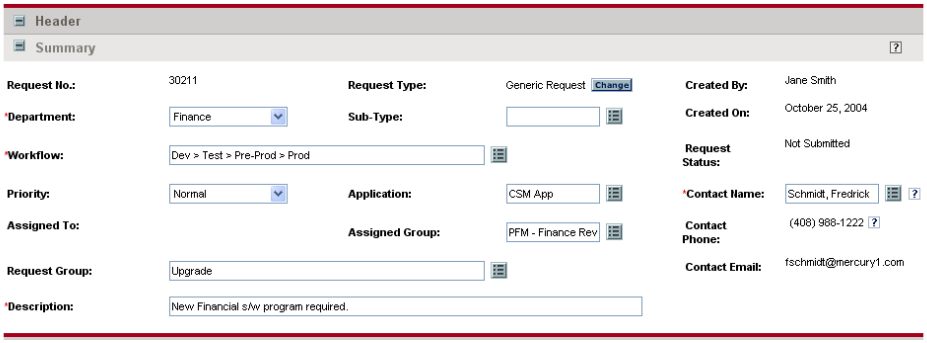
Figure 2-3. Request detail page, general information



Request Detail Page, Header Section

The **Header** section of a request's detail page contains general information concerning the request, such as who created the request, the date, and the type of request. The **Header** section is included in the request creation process and continues with the request until resolution. Typically, when creating a request, you need to complete some of the fields in the **Header** section. (*Figure 2-4* shows a typical **Header** section). However, requests are highly configurable. As such, the fields in a **Header** section can vary between different types of requests.

Figure 2-4. Request detail page, Header section

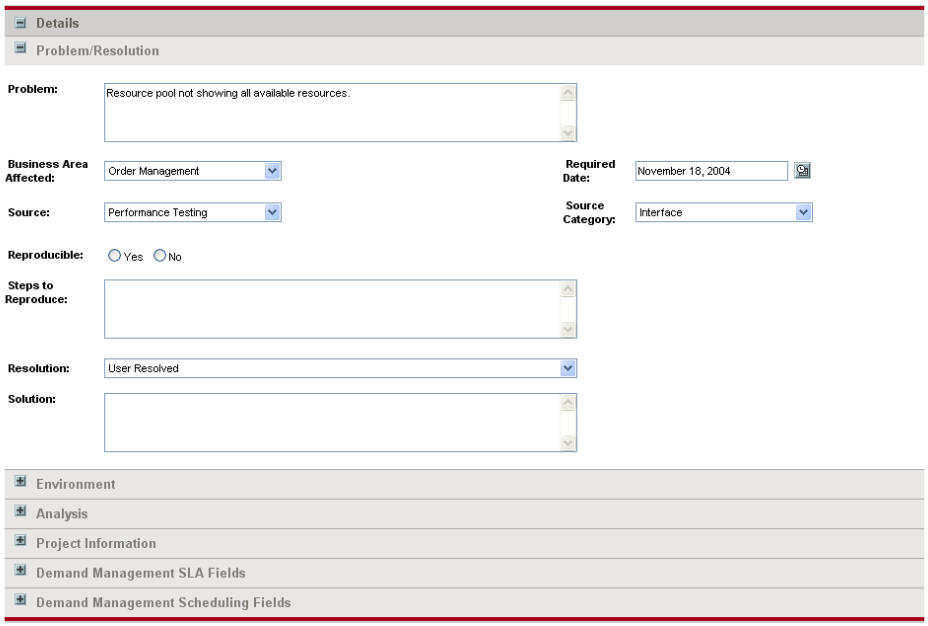


Request Detail Page, Details Section

The **Details** section of a request's detail page (see *Figure 2-5* on page 23) contains information specific to the request, including a description of the problem, the business area affected, and the resolution of the request. The **Details** section is included in request creation and continues with the request until resolution. Typically, when creating a request, you must complete some of the fields in the **Details** section. After a new request is submitted, various fields must be updated as the request proceeds through the resolution process.

The **Details** section contains several subsections, including **Problem/Resolution** and **Analysis.** However, requests are highly configurable, and the sections and controls displayed vary depending on request type.

Figure 2-5. Request detail page, Details section

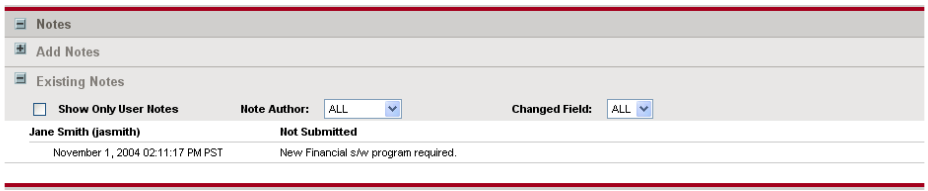


Request Detail Page, Notes Section

The **Notes** section of a detail page contains fields where notes and information concerning the request can be entered and stored. The **Notes** section is included in the request creation process and continues with request until resolution.

Figure 2-6 shows a typical **Notes** section. All **Notes** sections include the **Add Note** section. The **Existing Notes** section is displayed after the first note is added.

Figure 2-6. Request detail page, Notes section



Request Detail Page, Status Section

The **Status** section of a request's detail page lists the workflow steps associated with a request. If a workflow step has been acted on, the status of the workflow step and who completed the step are also listed. Workflow steps can be linked to a Web address (URL) which might describe the workflow step or provide some other information. The active workflow step is highlighted.

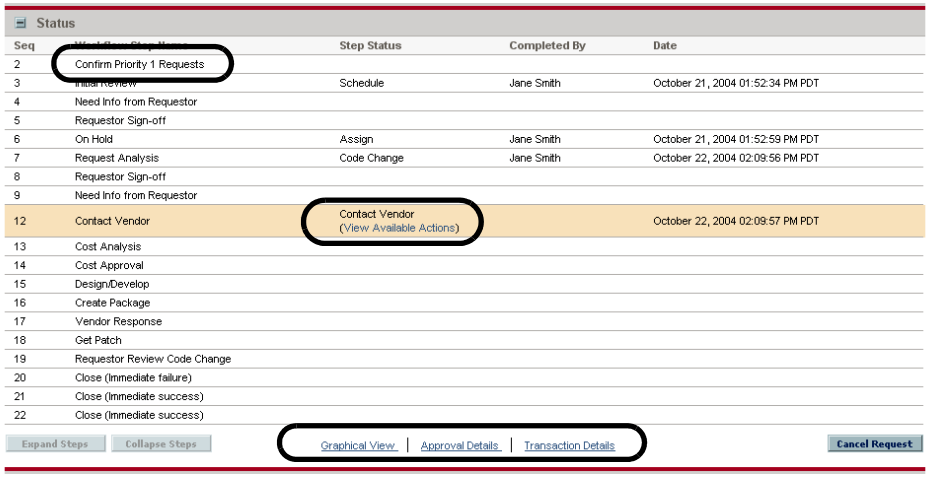
If you have the permissions required to act on the active workflow step, a **View Available Actions** link is displayed in the **Step Status** column (*Figure 2-7*). Click the link to access the workflow step's available actions. Note that the available actions are also shown in the **Available Actions** section of the title section (see *Request Detail Page, Top Section* on page 20).

Some workflows include subworkflows. Subworkflow steps are displayed sequentially with the other workflow steps. Subworkflow steps are numbered with additional decimal places, corresponding to the workflow level (for example, 3.1, 3.2, and 3.3).

In addition to the list of workflow steps, the **Status** section includes the following links:

- **Graphical View** displays the workflow associated with the request.
- **Approval Details** displays a detailed view of approved and completed workflow steps.
- **Transaction Details** displays detailed information of each completed workflow step transaction.

Figure 2-7. Request detail page, Status section



Request Detail Page, Graphical View

The **Graphical View** link on a request detail page opens the Graphical Workflow window, which displays a graphical representation of the workflow applied to the request. The workflow shows which workflow steps have been visited and which workflow step is the current workflow step.

To see the graphical workflow for a request.

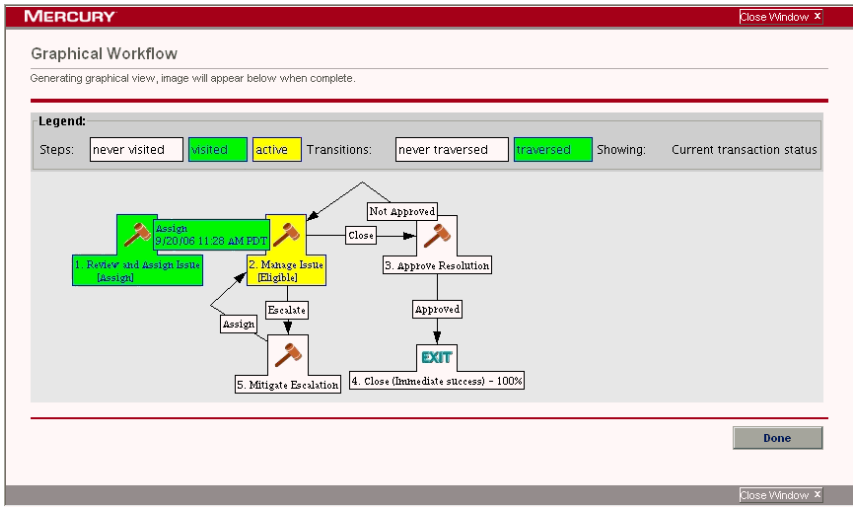
1. From the standard interface, open a request of interest to you.

Note

For information on how to open requests, see *Opening a Request* on page 20.

2. On the detail page, scroll to, and then expand the **Status** section.
3. At the bottom of the **Status** section, click **Graphical View.**

   The Graphical Workflow window opens.



The **Legend** section provides a key to the colors used to display the workflow steps.

Your administrator can assign a **Current %Complete** value to individual workflow steps. As the request moves along the workflow, the percent completed is updated according to the value configured for each step.

Request Detail Page, Approval Details

The Approval Details window for a request displays a detailed view of approved active and completed workflow steps.

To view the approval details for a request:

1. From the standard interface, open the request of interest to you.

Note

For information on how to open requests, see *Opening a Request* on page 20.

2. On the detail page, scroll to, and then expand the **Status** section.
3. At the bottom of the **Status** section, click **Approval Details.**

   The Approval Details window opens.

The **Approvers** columns list the names of the security groups whose members can act on the workflow step (or, if a workflow is completed, the security groups whose members have acted on the step). The Approval Details window also displays any conditions required to complete a workflow step (for example, All Users Must Decide).

Depending on how the workflow step is configured, the **Approvers** column lists the name of the security group, or the names of individual users. To display the names of the users who belong to a listed security group, click the security group name.

A workflow decision step can have any number of different results. The **Decision Results** column displays the actual result of the workflow step. The **Decision Date** column displays the calendar date on which the decision result occured (after all required approvers and decision makers submitted their input).

Request Detail Page, Transaction History

The Transaction Details window lists information for each completed workflow step transaction.

To view the transaction details for a request:

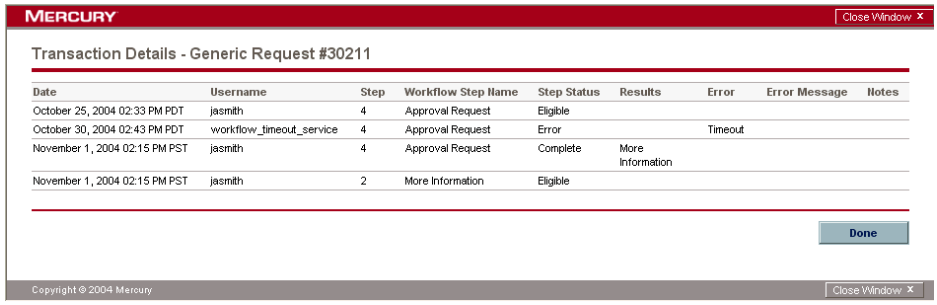
1. From the standard interface, open a request of interest to you.

Note

For information on how to open requests, see *Opening a Request* on page 20.

2. On the detail page, scroll to, and then expand the **Status** section.
3. At the bottom of the **Status** section, click **Transaction Details.**

   The Transaction Details window opens.



Request Detail Page, Request Execution Log

You can view the details related to the execution workflow step for a request by opening the Request Execution Log page.

To view the request execution log for a workflow step:

1. From the standard interface, open the request of interest to you.

Note

For information on how to open requests, see *Opening a Request* on page 20.

2. On the detail page, scroll to, and then expand the **Status** section.
3. In the **Step Status** column for an execution step, click **log.**
4. The Request Execution Log page opens and displays the details of the request execution.

Request Detail Page, References Section

The **References** section of the request detail page contains additional information related to the request. For example, you might add a URL to a request or delete an outdated document from a request. The **References** section is included in the request creation process and remains through to request resolution. References can be added or deleted from the request.

Use the **Reference Additions** subsection to add references to the request. Saved references are organized based on reference type. For example, all saved reference packages are saved in the **Packages** section.

In some cases, you can create a functional dependency between a request and the referenced entity. For example, you can specify that a package is a predecessor to the request. This means the request cannot continue to the next workflow step until the package is closed. For a list of the references, their definitions, and possible dependency relationships, see *Table 2-1* on page 29.

Figure 2-8. References section of the request detail page

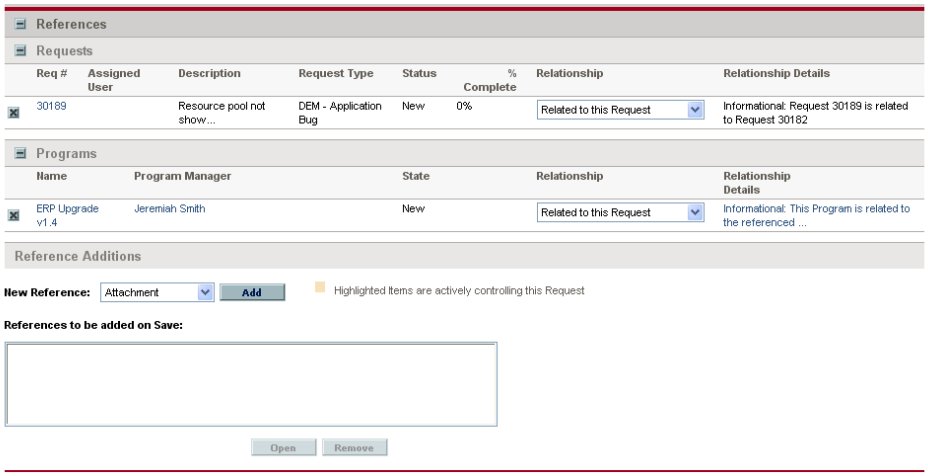


Table 2-1. References and relationships (page 1 of 3)

Reference	Reference Description	Possible Relationships	Relationship Description
Attachment	Attach a file from a local machine to the current request. The attached file is copied to the server.	Standard attachment interaction	(Informational) The attachment is related to this request.
Packages (Existing)	Reference an existing packages.	Child of this request	(Informational) The selected package is the child of the request.
		Related to this request	(Informational) The selected package is related to the request.
		Predecessor	(Blocking) Action is not allowed on the request until the referenced package closes.
		Successor	(Blocking) Action is not allowed on the referenced package until the request closes.
Packages (New)	New packages can also be created from a request. If configured as part of the workflow, you can spawn a package from a workflow step. When this happens, a reference to that package is automatically generated, establishing a two-way link between the request and package.	Child of this request	(Informational) The selected package is the child of the request.
		Related to this request	(Informational) The selected package is related to the request.
		Predecessor	(Blocking) Action is not allowed on the request until the referenced package closes.
		Successor	(Blocking) Action is not allowed on the referenced package until the request closes.
Projects	Reference a project in Mercury Project Management.	Related to this request	(Informational) Selected project is related to this request.

Table 2-1. References and relationships (page 2 of 3)

Reference	Reference Description	Possible Relationships	Relationship Description
Releases	Reference a release in Mercury Deployment Management™.	Contains this package	(Informational) The request is contained in the selected release.
Requests (Existing)	Reference an existing request.	Duplicate request	(Informational) The referenced request is a duplicate of the request.
		Original duplicate requests	(Informational) The referenced request is the original of the two duplicate requests.
		Parent of this request	(Informational) The referenced request is the parent of the request.
		Child of this request	(Informational) The referenced request is the child of the request.
		Related to this request	(Informational) Referenced request is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this request closes.

Table 2-1. References and relationships (page 3 of 3)

Reference	Reference Description	Possible Relationships	Relationship Description
Requests (New)	You can create new requests from an existing request. Also, if configured as part of the workflow, you can spawn a request from a request. A reference to that request is automatically generated, establishing a two-way link between the requests.	Duplicate request	(Informational) The referenced request is a duplicate of the request.
		Original duplicate requests	(Informational) The referenced request is the original of the two duplicate requests.
		Parent of this request	(Informational) The referenced request is the parent of the request.
		Child of this request	(Informational) The referenced request is the child of the request.
		Related to this request	(Informational) Referenced request is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this request closes.
Tasks	Reference a task in a Mercury Project Management.	Related to this request	(Informational) The referenced task is related to this request.
URL	Reference a Web address. Documents at the URL must be in MIME format.	Standard URL interaction	(Informational) The URL is related to this request.

Predecessor Relationships

Predecessor relationships dictate that an action cannot be performed on one entity until the referenced entity closes. For example, an action is not allowed on a request until the referenced package closes. After the package closes, users can again act on the request. (This does not prevent users from editing other request fields.)

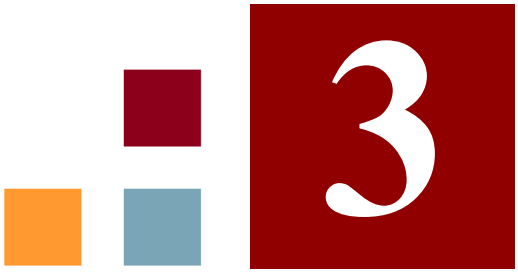
Successor Relationships

Successor relationships dictate that action is not allowed on referenced entity until the entity closes. For example, users cannot perform an action on a referenced package until the request closes. The package status is **Pending Request.** After the request closes, users can act on the package again. This does not prevent users from modifying other task fields.

Finish/Finish Predecessor Relationships

Finish/Finish, or FF, predecessor relationships dictate that the two entities complete at the same time. For example, a referenced package cannot have a status of **Complete** until the original request is closed. After the resource working on the original request is finished, and the status is set to **Completed** (**% Complete** is set to **100%**), the referenced package acquires **Completed (Pending Request)** status. After the request is closed, the referenced package is set to **Completed.** (This does not prevent users from editing other request fields.)

Chapter



Creating Requests

In This Chapter:

Overview of Creating Requests

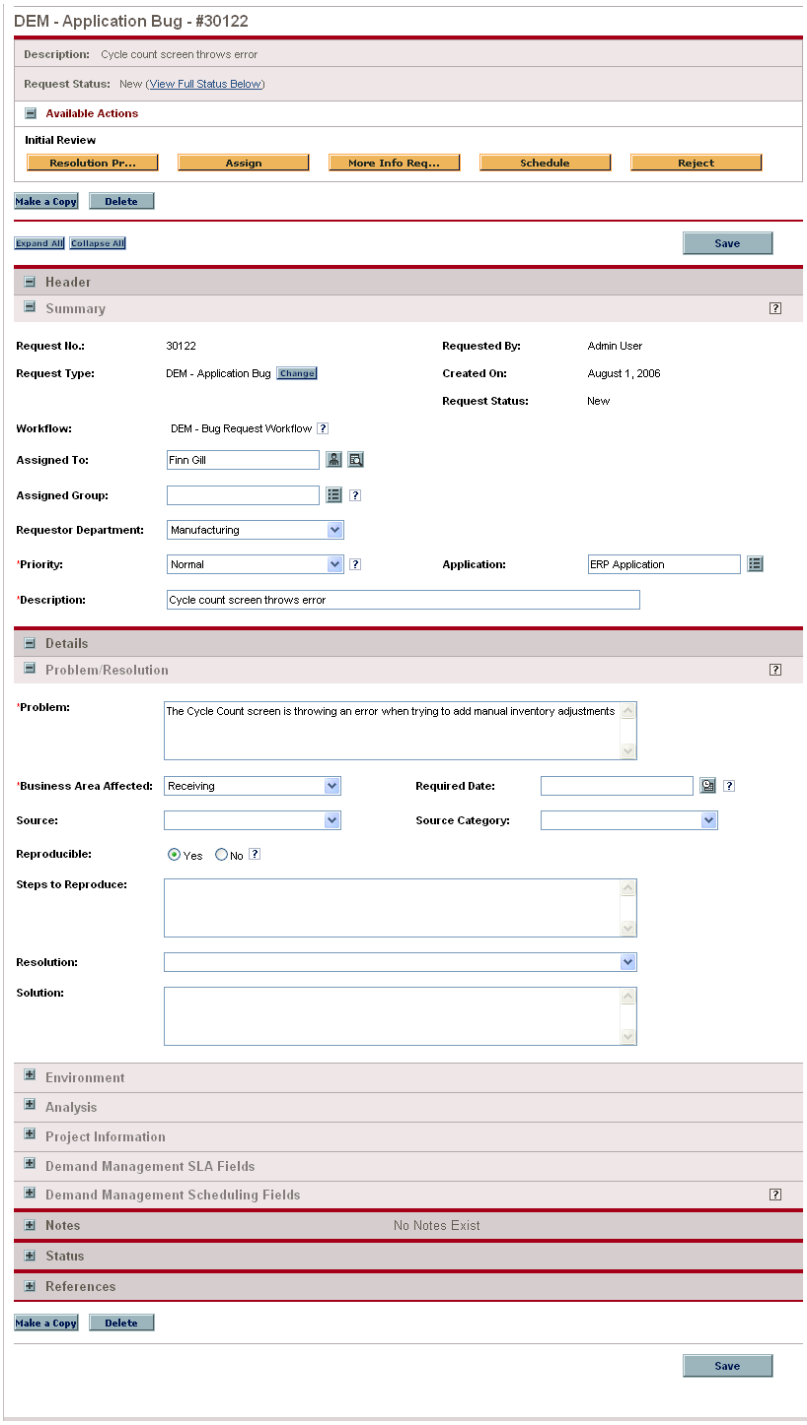
In Mercury Demand Management, requests are the means by which actions and processes are initiated. Requests contain all of the information necessary to take a series of actions and move through a workflow.

The information that a request contains depends on what type of request it is. For example, if you create an enhancement request, the information you provide is different than if you create an application defect request. However, most request types have the same basic organization.

Figure 3-1 on page 35 shows a request detail page that is minimized to show only the main sections. The following are the main sections on a request detail page:

- The **Header** section contains general information such as the request type, who created the request, and on what date.
- The **Details** section contains information specific to the request, such as a description of the problem, the business area affected, and the resolution of the request. Typically, when creating a request, you'll be required to complete some of the fields in the Details section.
- The **Notes** section provides fields for entering information about the request that you want to keep. Entering notes is optional.
- Use the **References** section to add and view additional information about the request. For example, you can attach a document or specify a URL as a request reference.

Figure 3-1. Request detail page, with some Header sections minimized



For more information about request detail pages, see *Viewing Requests* on page 17.

Creating Requests

To create requests, you use the Create New Request page. You can use the following methods to access this page:

- Menu bar
- **References** section on a request detail page
- Copy an existing request
- From a Mercury Project Management project
- From a Mercury Project Management task
- From a Mercury Deployment Management package
- From a Mercury Deployment Management release

For information on how to create a request from Mercury Project Management, see *Integrating Requests and Projects* on page 71. For information on how to create a request from Mercury Deployment Management, see the *Mercury Deployment Management User's Guide.*

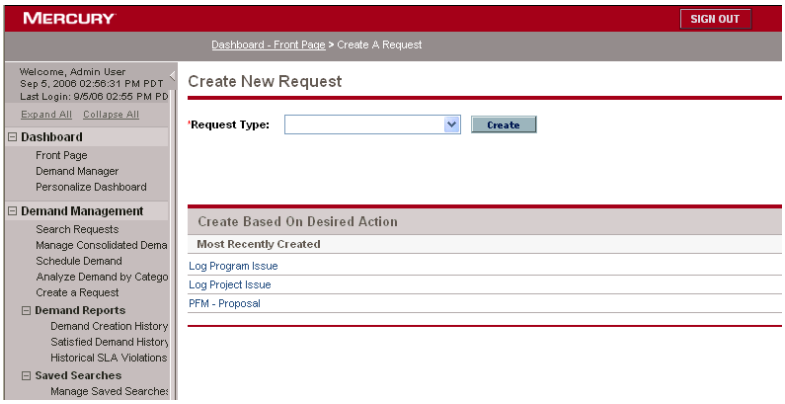
Creating Requests from the Menu Bar

The most common way to create a request is by using the menu bar. After you create a request, it is automatically assigned a unique number and then tracked from start to finish. This ensures task completion and accountability for all steps within the request's workflow.

To create a request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Demand Management > Create a Request.**

The Create New Request page opens.

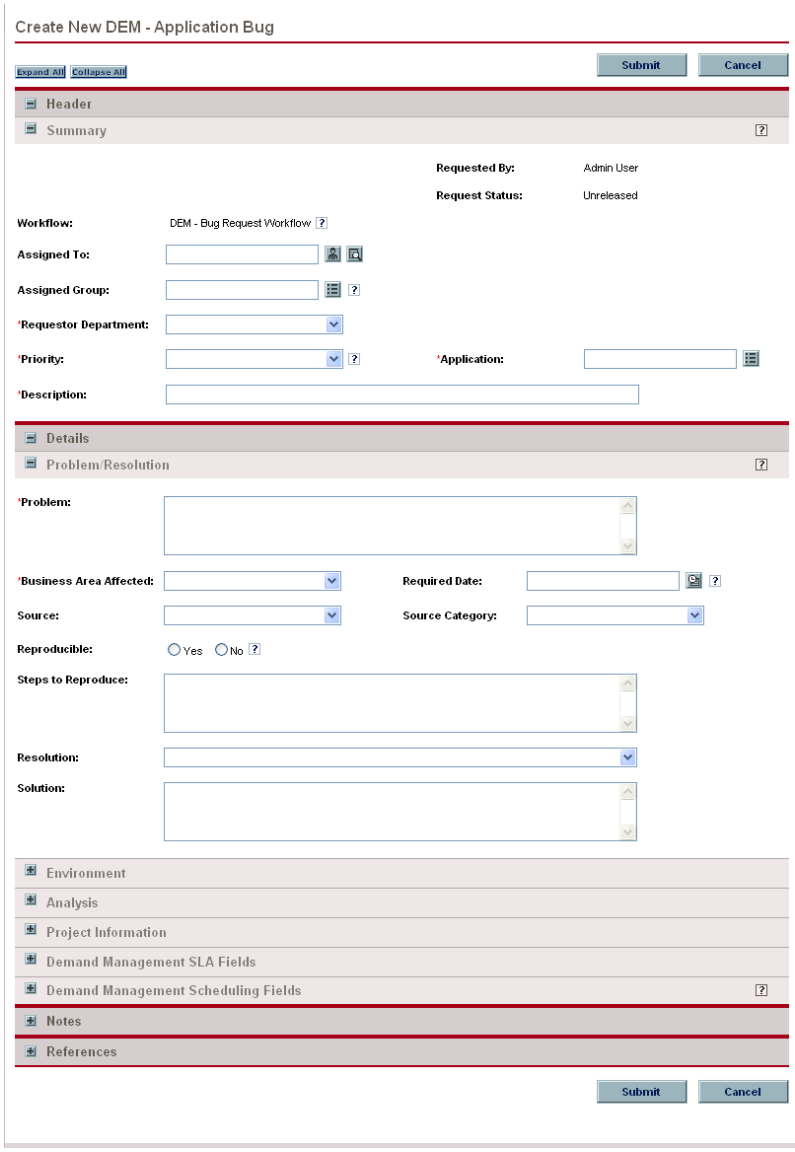


3. From the **Request Type** list, select the request type to create.

   The request type you select depends on your licenses and access grants, and on the security groups to which you are assigned. To save you time, the **Create Based on Desired Action** section lists the most recently created request types.

4. Click **Create.**

   The Create New <*Request Type*> page opens.



5. In the **Header** section, complete the fields, as required.

   The **Header** section contains fields for entering general information about the request. Required fields are marked with a red asterisk. All other fields are optional, but you can use them to provide information that can be useful to others reviewing the request.

6. In the **Details** section, complete the required fields, and provide any other information about the request that might be useful.

   The **Details** section can have none, one, or many subsections. For information about a specific field, click the **Help** icon (if available) next to the field.

7. In the **Notes** section, type additional information about the request that you want to make available to other users.

8. Use the **References** section to add references to the request.

   You can reference a Web-accessible file or attach a document or file from your local machine to the current request. You can also reference packages, tasks, and other requests. For more information on how to add references, see *Overview of Adding References* on page 42.

9. Click **Submit.**

   The Request Creation Confirmed page opens and displays the number assigned to the new request, and the request description.


Note

Mercury IT Governance Center can be configured to save requests before they are submitted. To have this feature enabled for your site, see your application administrator.

10. To see the generated detail page for a submitted request, click **Request #.**

After you submit a new request, Demand Management assigns it an initial status, such as New, and then routes it along a standard business process of approvals, decisions, and actions, depending on the associated workflow. For more information, see *Processing and Managing Requests* on page 55.

Creating Requests from the References Section

You can create a request from the **References** section of the detail page for a request.

To create a request from a **References** section of a request detail page:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Demand Management > Search Requests.**

   The Search Requests page opens.

3. To locate a request, enter search criteria, and then click **Search.**

4. In the **Request Search Results** section, in the **Req #** column, click a number to open the corresponding request.

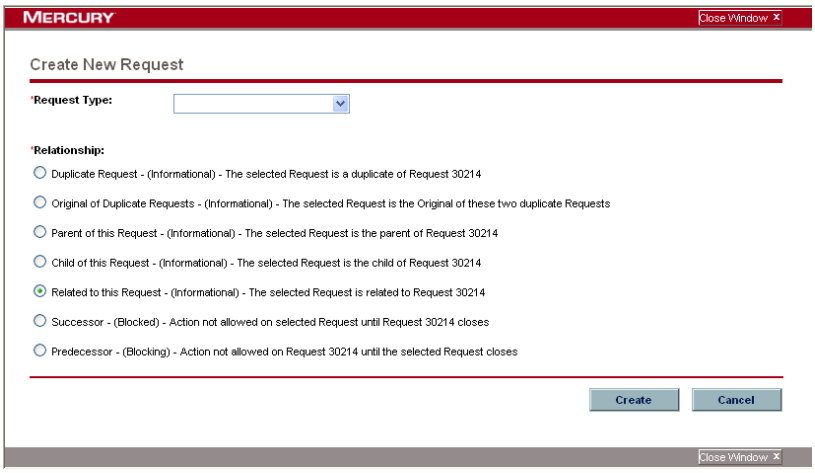
   The detail page for the request opens.

5. Scroll to, and then expand, the **References** section.

6. From the **New Reference** list, select **Request (New).**

7. Click **Add.**

   The Create New Request page opens.



8. From the **Request Type** list, select the type of request you want to create.

9. Under **Relationship,** select the option that indicates how the new request is related to the request you opened.

Note

For more information about establishing relationships between requests, see *Overview of Adding References* on page 42.

10. Click **Create.**

    The Create New *<Request Type>* page opens.

11. In the fields marked with a red asterisk, provide all required information.

12. Provide any additional information about the request that might be useful.

Note

For instructions on how to complete the Create New *<Request Type>* page, see *Creating Requests from the Menu Bar* on page 36.

13. Click **Submit.**

Creating Requests by Copying Requests

You can copy an existing request to create a request. This can save you time by eliminating the need to re-enter information that is common to both requests.

To copy an existing request:

1. Log on to Mercury IT Governance Center.
2. Open a request.

Note

To open a request, see *Opening and Updating Requests* on page 56

   The detail page for the request opens.

3. Above the **Header** section, click **Make a Copy.**

   The Copy Request page opens.

4. To add the notes associated with the original request to the new request, leave the **Copy Request Notes** checkbox selected.
5. To add the references associated with the original request to the new request, leave the **Copy Request References** checkbox selected.
6. Click **Copy.**

   The Create New <*Request Type*> page opens and displays the copied information. The values from all the fields in the **Header** and **Details** sections are replicated in the new request.

7. Modify the field values, as required, and then click **Submit.**

Overview of Adding References

You can use the **References** section on the detail page to add (and view) supplementary information related to the request. For example, you might add a document or the URL for a Web page that provides a more information about the request.

You can associate the following reference types with a request:

- Attachments
- Packages (new and existing)
- Other programs
- Projects
- Releases
- Requests (new and existing)
- Tasks
- URLs

For some references, such as packages and other requests, you can establish a functional dependency to the original request. For example, you can specify that a request is a predecessor to the package so that the package cannot continue along its workflow until the request is closed. For a list of the references and their possible dependency relationships, see *Request Detail Page, References Section* on page 28.

Adding References to Requests

This section provides the steps you perform to add different types of references to a request.

Adding Attachments as References

To add an attachment as a reference to a request:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Attachment.**
5. Click **Add.**

   The Add Document window opens.
6. In the **File** field, type the name of the document file to attach as a reference.
7. In the **Author** field, you can replace your name with the name of the attachment author.
8. In the **Description** field, you can type a description of the attachment.
9. Click **Add.**

   On the request detail page, the **References to be added on Save** field lists the referenced attachment.
10. Click **Save.**

Note

To add the reference, you must save the request or, if this is a new request, submit the request.

Adding Existing Packages as References

You can reference existing packages to a request.

To reference an existing package:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

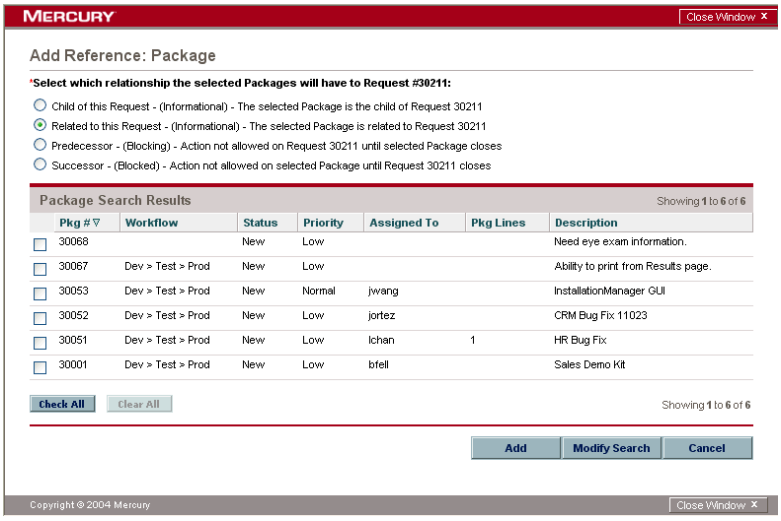
Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Package (Existing).**
5. Click **Add.**

   The Add Reference: Package window opens.
6. Enter your search criteria in the available fields.
7. Click **Search.**

   The **Package Search Results** section lists the packages that match your search criteria. The section also includes a list of relationship types.
8. Under **Select which relationship the selected packages will have to Request # *<request number>*,** click the option that describes the relationship between the request and the package.



9. In the **Package Search Results** section, select the checkbox(es) next to the name(s) of the package(s) to add.
10. Click **Add.**

    On the request detail page, the **References to be added on Save** field displays the package name and its relationship to the request.
11. Click **Save.**

    The **Packages** subsection of the **References** section now lists the referenced package.

Warning

To add the package as a reference, you must save the request.

Adding New Packages as References

You can create a new package to add as a request reference.

To reference a new package:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

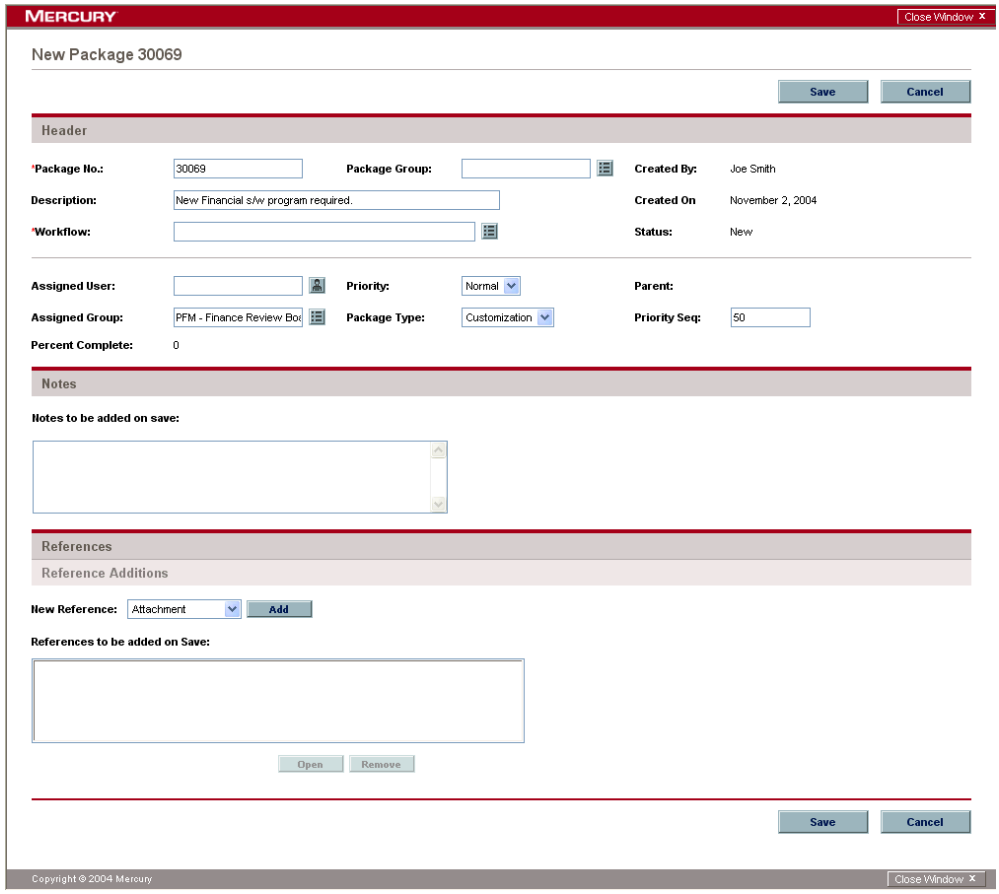
For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Package (New).**
5. Click **Add.**

   The Create New Package window opens.
6. Under **Relationship,** select the option that describes the relationship between the new package and the open request.

7. Click **Create.**

   The New Package window opens. Any matching header information from the request (such as description, priority, and package type) is automatically added to the package.



8. Provide all required information, and any optional package information you want to make available, and then click **Save.**

   On the request detail page, the **References to be added on Save** field lists the new package name.

9. Click **Save.**

Warning

To add the package as a reference, you must save the request.

Attaching Programs as References

You can reference existing programs to a request.

To reference an existing program:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Program.**
5. Click **Add.**

   The Reference Program window opens.
6. In the **Program** field, type the name of the program you are adding as a request reference.
7. Under **Relationship,** select the option that describes how the program is related to the request.
8. Click **Add.**

   On the request detail page, the **References to be added on Save** field lists the program name and displays its relationship to the request.
9. Click **Save.**

Warning

To add the program as a reference, you must save the request.

Attaching Projects as References

To attach existing projects as a reference:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Project.**
5. Click **Add.**

   The Add Reference: Project window opens.
6. Provide the required information, and any optional information you want to record, and then click **Search.**

   The Add Reference: Project window lists relationship types and the projects that match your search criteria.
7. Under **Select which relationship the selected Projects will have to Request # *<request number>*,** select the option that describes how the project(s) is related to the request.
8. In the **Select Project to View** section, select the checkbox(es) for the project(s) you want to add as a reference to the request.
9. Click **Add.**

   On the request detail page, the **References to be added on Save** field lists the project name and displays its relationship to the request.
10. Click **Save.**

Note

To add a reference, you must save or submit the request.

The detail page for the request now lists the selected project(s).

Adding Releases as References

You can reference existing releases to requests.

To reference an existing release:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Release.**
5. Click **Add.**

   The Reference Release window opens.
6. In the **Release** field, type the release version.
7. Under **Relationship,** select the option that describes the relationship that the release has to the open request.
8. Click **Add.**

   On the request detail page, the **References to be added on Save** field lists the release name and displays its relationship to the request.
9. Click **Save.**

To add the release as a reference, you must save the request.

Adding Existing Requests as References

You can reference existing requests to requests.

To reference an existing request:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Request (Existing).**
5. Click **Add.**

   The Add Reference: Request window opens.
6. To locate the request to reference to the open request, enter your search criteria, and then click **Search.**

   The Add Reference: Request window lists the possible relationship types. The **Request Search Results** section lists the requests that match your search criteria.
7. Under **Select which relationship the selected Requests will have to Request # *<request number>*,** select the option that describes how the request you are about to select is related to the open request.
8. In the **Request Search Results** section, select the checkbox(es) for the request(s) you want to add.
9. Click **Add.**

   On the detail page for the request, the **References to be added on Save** field lists the selected request(s).
10. Click **Save.**

Note

To add the reference, you must save the open request.

In the **References** section of the request detail page, the **Requests** subsection lists the referenced request(s).

Adding New Requests as References

You can add new requests as references to an existing request.

To reference a new request:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Request (New).**
5. Click **Add.**

   The Create New Request window opens.
6. From the **Request Type** list, select the type of request you want to create.
7. Under **Relationship,** select the option that describes how the new request is related to the open request.
8. Click **Create.**

   The Create New <*Request Type*> window displays the fields available for the selected request type.
9. Provide information for all required fields, and any optional information you want to record.
10. Click **Submit.**

    On the detail page for the original (open) request, the **References to be added on Save** field lists the selected request.
11. Click **Save.**

In the **References** section of the request detail page, the **Requests** subsection lists the new request you added.

Adding Tasks as References

You can add tasks as references to requests.

To reference an existing task:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Task.**
5. Click **Add.**

   The Add Reference: Task window opens.
6. Using the fields provided, enter your search criteria.
7. Click **Search.**

   The Add Reference: Task window lists the tasks that match your search criteria.

Note

"Related to this Task" is the only relationship that can exist between requests and tasks.

8. In the **Select Task to View** section, select the checkboxes for the tasks that you want to add as references to the open request.
9. Click **Add.**

   On the detail page for the request, the **References to be added on Save** field now list the selected task(s).
10. Click **Save.**

In the **References** section of the request detail page, the **Tasks** section lists the task(s) you added.

Adding URLs as References

You can reference an existing URL to a request.

To reference an existing URL:

1. Log on to Mercury IT Governance Center.
2. Open or create a request.

Note

For information on how to open an existing request, see *Opening and Updating Requests* on page 56. For information on how to create a request, see *Creating Requests* on page 36.

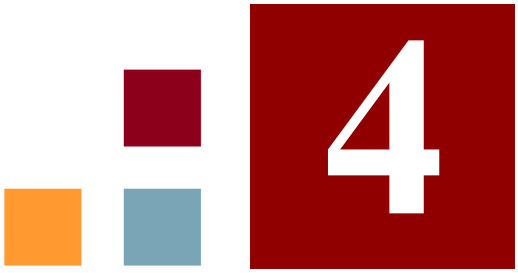
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **URL.**
5. Click **Add.**

   The Reference URL window opens.
6. In the **URL** field, type the URL address.
7. To test the URL, click **View URL.**
8. In the **Description** field, you can type a brief description of the URL.
9. Click **OK.**

   On the detail page for the open request, the **References to be added on Save** field lists the URL you specified.
10. Click **Save.**

In the **References** section of the request detail page, the **URLs** section lists the URL you added.

Chapter



Processing and Managing Requests

In This Chapter:

Overview of Processing and Managing Requests

In Mercury Demand Management, After a new request is submitted, it can be *processed* and *managed*. Processing refers to updating requests and moving them through their assigned workflow steps. Managing refers to performing such actions as printing or purging requests.

To locate requests that require attention, do one of the following:

- **View Portlets.** Personalize Demand Management request portlets to display only the requests that are assigned specifically to you.
- **Perform Searches.** Use the Search Requests page.
- **Receive Notifications.** As a request proceeds through its workflow steps, email can be sent to notify you of pending actions. The notification might include a link that you can click to open the referenced request.

  If you are logged on to Mercury IT Governance Center, the referenced request opens. If you are not logged on, the Logon page opens. After you log on, the referenced request opens.

  You can configure request types to send email notifications after:

  - A request reaches a specific workflow step
  - A specific field changes value

Opening and Updating Requests

If you have the required security permission, you can open and update Demand Management requests. This can involve:

- Searching requests
- Opening a request
- Changing information in request fields
- Adding notes or references to a request
- Performing an available action

This section addresses these tasks.

Using the Query Builder to Search Requests

To locate requests, you can perform simple searches based on generic request fields, and more advanced searches based on the request fields for one or more requests. If your administrator has assigned you the Demand Mgmt: Access Request Query Builder access grant, you can also use the request query builder to create custom search queries for request type-specific fields. You access the query builder from the Demand Management Search Requests page.

Request Query Components

To use the query builder to construct a request query, you can combine multiple search terms with logical operators and use comparison operators to define search terms. A search term takes the following form:

<FieldName> <ComparisonOperator> <Value(s)>

where *<FieldName>* is a field on a request, *<ComparisonOperator>* is one of the operators listed in *Table 4-1*, and *<Value(s)>* is one or more values that the field can assume.

Comparison Operators for Building Request Queries

Table 4-1 lists the comparison operators supported for building request queries in Demend Management. In the **Description** column, the "value on the left" refers to the value of the request field (in the request object), identified by *<FieldName>* in the search term. The "value on the right" refers to the *<Value(s)>* specified in the search term (in the query builder).

Table 4-1. Supported operators for building queries (page 1 of 2)

Operator	Symbol	Value	Description
Greater than	>	Number/ Date	Value on the left is greater than the value on the right
Less than	<	Number/ Date	Value on the left is less than the value on the right
Greater than or equal to	>=	Number/ Date	Value on the left is greater than or equal to the value on the right
Less than or equal to	<=	Number/ Date	Value on the left is less than or equal to the value on the right

Table 4-1. Supported operators for building queries (page 2 of 2)

Operator	Symbol	Value	Description
Equal to	=	Number/ Date	Value on the left is equal to the value on the right
		String	Value on the left is the same as the value on the right (case-insensitive match)
Does not equal	!=	Number/ Date	Value on the left does not equal the value on the right
		String	Value on the left is not the same as the value on the right (case-insensitive match)
In	IN	Number/ Date	Value on the left matches one of the values listed on the right.
		String	Value on the left matches one of the values listed on the right.
Not in	NOT IN		
Contains	contains	String	The string on the right is a substring of the string on the left.
Starts with	startswith	String	The string on the right is the start of the string on the left (case-insensitive).
Ends with	endswith	String	The string on the right is the end of the string on the left (case-insensitive).

Logical Operators for Building Request Queries

The logical operators for building a query are AND, OR, and NOT.

You can:

- Use AND/OR to link multiple search terms in a compound query.
- Prefix the NOT operator to any search term. For example:

```
Priority='High' AND Status='InProgress' AND NOT AssignedTo
IN {'johndoe','janedoe'}
```

Grouping Search Terms in Queries

You can group one or more search terms with parentheses to create complex queries. For example:

```
(StartedOn > 5/5/06 AND StartedOn < 5/10/06) OR (StartedOn >
5/20/06 AND StartedOn < 5/30/06)
```

Opening Requests from Portlets

Demand Management request portlets include links to the request detail pages. To open the detail page associated with the request, in a Demand Management portlet, click a **Request #** link.

For information about Demand Management portlets, see *Managing Requests Using Portlets* on page 68 and *Portlets on the Demand Manager Page* on page 80.

Opening Requests Using Email Notifications

Some workflow steps are configured to send email notifications upon activation. Most email notifications include a link to the request.

To open the associated request, click the link. If you are logged on to Mercury IT Governance Center, the referenced request opens. If you are not logged on to IT Governance Center, the Mercury IT Governance Center Logon page opens. After you log on, the referenced request opens.

Opening Requests from the Menu Bar

To open and update a request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Demand Management > Search Requests.**
3. On the Search Requests page, enter your search criteria, and then click **Search.**
4. On the Request Search Results page, in the **Req#** column, click the number that corresponds to the request you want to open.

   The detail page for the request opens. The **Available Actions** section contains buttons for the actions that you have permission to perform.
5. To act on the request, in the **Available Actions** section, click a button.

Some actions, such as **Accept** and **Reject,** move the request to the next step in the workflow and require no additional input. Other actions, such as **Assign Resource** or **Delegate Decision,** require that you provide additional information.

If you are required to provide more information, a workflow step action page(s) opens. To complete the action, provide the required information.

Some actions change the status of a field. For example, a disabled field can become enabled or required (marked with a red asterisk). Check the **Header** and **Details** sections for newly enabled or required fields.

A request can have a reference relationship that places it on hold until another request (or other referenced entity) is completed. If the request has such a reference relationship, the **Available Actions** section contains the **Override** button. To override the referenced relationship and allow the request to continue through the workflow, click **Override.**

6. In the **Header** section, complete the fields, as required.

   The **Header** section includes general information about the request. Required fields are marked with a red asterisk. All other fields are optional. For information about a specific field, click the **Help** icon (if available) next to the field.

   If necessary, you can change the request type. For example, you can change a bug request to an enhancement request.

   Changing the request type can involve changing the fields are associated with the request. To reduce data entry if the request type is changed, Demand Management maps the fields from the original request type to the fields for the new request type. New fields contain no values. To change the request type, next to the **Request Type** field, click **Change.**

7. In the **Details** section, complete the fields, as required.

   The **Details** section includes specific information about the request. It can contain one, several, or no subsections. Required fields are marked with a red asterisk. To view more information about a specific field, click the **Help** icon (if available) next to the field.

8. In the **Notes** section, type additional information about the request that you want to record.

   The **Notes** section contains fields in which you can type notes about the request that you want to keep. To add a note, in the **Add Note** section, type the data. After you save the request, the note is added.

View existing notes in the **Existing Notes** section. Existing notes are listed in chronological order, with the most recent note at the top. To filter the notes for display, do one or more of the following:

- To display only the notes that users have entered, select the **Show Only User Notes** checkbox.
- To display notes that a specific user added, from the **Note Author** list, select the user name.
- To display only notes related to a changed value in a specific field, from the **Changed Fields** list, select the field name.

9. In the **Status** section, review the request status.

   The **Status** section lists all of the workflow steps and the status of each. The current workflow step is highlighted.

   In addition to the list of workflow steps, the **Status** section includes the following links:

   - **Graphical View.** Displays the workflow associated with the request.
   - **Approval Details.** Displays a detailed view of approved and completed workflow steps.
   - **Transaction Details.** Displays detailed information about each completed workflow step transaction.

   If the workflow step is an execution workflow step, it may be linked to a request execution log. To view the request execution log for a particular workflow step, in the **Step Status** column, click **log.**

   If you have the permission required to act on an eligible step, the **Step Status** column displays the **View Available Actions** link. To display the action page for a workflow step, click **View Available Actions.**

   The actions available on the action page are the same as those displayed in the title section for the request. To move the request to the next workflow step, complete the action.

10. Use the **References** section to add references to the request.

    You can view existing references in subsections of the **References** section. Existing references are grouped by entity type. For example, referenced requests are listed in the **Requests** section.

To change the relationship of an existing reference, from the **Relationship** list, select a different relationship. To delete a reference, click the **Delete** icon to the left of the reference name.

In some cases, you might want to reference a Web-accessible file or a document or file from a local machine to the request. You can also add other entities such as packages, tasks, or other requests as request references. For information about how to add references, see *Adding References to Requests* on page 43.

11. Click **Save.**

Editing Requests Simultaneously

If two users edit the same request at the same time, and then click **Save,** Demand Management attempts to save the changes that both users make. If a change is not saved, Demand Management notifies the user who entered it, and advises that user to make the change and save it again.

Example: Two Users Editing Fields

Two users, "Otumbo" and "Monette," are working in different locations and editing the same request.

- Otumbo makes changes to the **Assigned To** and **Department** fields, and adds text to the **Notes** field.
- Monette makes changes to the **Assigned To** and **Company** fields, and adds text to the **Notes** field.

1. Otumbo clicks **Save** first.

   All of his changes are saved.

2. Monette clicks **Save** next.

   Monette's **Notes** are saved, but a message at the top of the request informs her that another user has made changes to the request, and displays these changes. Monette must re-enter her changes to the **Assigned To** and **Company** fields.

3. Monette again changes values in the **Assigned To** and **Company** fields, and then clicks **Save.**

   The changes are saved.

Example: Two Users Editing Fields Plus Workflow Action

Two users, “Otumbo” and “Monette,” are working in different locations and editing the same request. They both have permission to move the request to its next workflow step.

1. Otumbo adds to the request **Notes** section, and then clicks the workflow action button.

   Otumbo’s changes are saved and the request advances along its workflow.

2. Monette adds an attachment to the request, and then clicks the workflow action button.

   The attachment to the request is saved, but a message at the top of the request informs Monette that the workflow action she attempted has already been performed. No further action is necessary.

Example: Parallel Workflow Steps

Otumbo and Monette are editing the same request that is being processed along parallel branches of a workflow. Both users can process the request along these parallel branches independently without problems.

Managing Requests

After you submit a request in Demand Management, users who have the required permission can view, change, or delete that request, depending on changes to the business requirements or workflow.

Reopening Closed Requests

You can reopen a request at a preconfigured step in the workflow. For example, if a defect request is closed and the defect recurs, you can reopen the request.

To reopen a request:

1. Log on to Mercury IT Governance Center.
2. Search for and open the request.

Note

For information on how to open a request, see *Opening and Updating Requests* on page 56.

The request detail page opens.

3. Scroll to the **Status** section.
4. Click **Reopen Request.**

The request reopens.

Deleting Requests

You can only delete saved requests from IT Governance Center. To delete a request, you must have either the Demand Mgmt: Edit Requests access grant or the Demand Mgmt: Edit All Requests access grant. Deleted requests can no longer be opened or viewed.

To delete a request:

1. Log on to Mercury IT Governance Center.

2. Search for and open the request.

Note

For information on how to open a request, see *Opening and Updating Requests* on page 56.

The request detail page opens.

3. Scroll to the bottom of the page.
4. Click **Delete.**

   Demand Management prompts you to confirm that you want to delete the request.
5. Click **OK.**

Cancelling Requests

You can only cancel saved requests in Mercury IT Governance Center. To cancel a saved request, you must have either the Demand Mgmt: Edit Requests access grant or the Demand Mgmt: Edit All Requests access grant.

To cancel an existing request:

1. Log on to Mercury IT Governance Center.
2. Search for and open the request.

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Note

For information on how to open a request, see *Opening and Updating Requests* on page 56.

The request detail page opens.

3. Scroll to the **Status** section.
4. Click **Cancel Request.**

   Demand Management prompts you to confirm the cancellation.
5. Click **OK.**

   This cancels each workflow step and sets the request status to **Cancelled.**

Printing Requests

You can print the detail page for a request.

Note

You cannot modify the printable version of the detail page.

To print a request:

1. Log on to Mercury IT Governance Center.
2. Search for and open the request.

Note

For information on how to open a request, see *Opening and Updating Requests* on page 56.

The request detail page opens.

3. At the top of the page, click **Print Business Case.**

   A printable version of the page opens in a new browser window.

4. On the printable version of the page, click **Print.**

Purging Requests

You can delete multiple requests at the same time (if you have the required permissions). You cannot open or view deleted requests.

To purge multiple requests:

1. Log on to Mercury IT Governance Center.
2. Search for the requests to purge.

   The search results page opens.

3. In the **Request Search Results** section, select the checkboxes that correspond to the requests you want to delete.
4. Click **Delete.**

Managing Requests Using Reports

Demand Management includes a predefined set of reports, which are listed in *Table 4-2*. If you have the System: Submit Report access grant, you can generate these reports at any time to monitor request activity.

Table 4-2. Demand Management reports

Report Name	Description
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
Demand Creation History	Shows the history of demand creation for a specified demand set.
Historical SLA Violation	Shows the history of SLA violations for a specified demand set.
Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using several selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered based on values in custom fields.
Request History	Lists the complete workflow and field change history for each selected request.
Request Quick View	Provides a summary of open and closed requests, organized based on priority.
Request Summary	Displays the total counts for groups of requests matching the selection criteria.
Request Summary (Filter by Custom Fields)	Similar to the Request Summary report except that requests can be filtered based on values in custom fields.

For more information about these and other predefined reports in Mercury IT Governance Center, see the *Reports Guide and Reference*.

Managing Requests Using Portlets

You can use the Mercury Demand Management request portlets to organize and present request information. *Table 4-3* on page 68 lists the demand-related portlets that you can add to your Dashboard pages (including the preconfigured Demand Manager page) and customize to suit your information needs.

For information about the default portlets displayed on the Demand Manager page, see *Portlets on the Demand Manager Page* on page 80. For information about how to configure the information displayed in a portlet, see *Customizing Portlets* on page 84.

Table 4-3. Demand-related portlets (page 1 of 3)

Portlet Name	Description
Assignment Queue	The Assignment Queue portlet provides a customizeable view of the demand that has not yet been assigned to a resource. Use this portlet to assign a resource to a request.
Demand by Category	The Demand by Category portlet provides graphical summary view into different aspects of demand. You can organize the information displayed in the portlet based on department, demand type, priority value, and so on. You can also organize the displayed information based on the number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.
Demand List	The Demand List portlet provides a list of the demands placed on an organization or resource. You can configure this portlet to display demand information filtered based on criteria such as demand type, assigned priority value, demand disposition, and so on.
Issue List	Lists open issues associated with programs.
My Requests	The My Requests portlet displays all requests created by or assigned to the user, and which are at a workflow step that the user can act on. This portlet provides a view of the most pressing requests. By default, the portlet displays all requests (with a current active step) created by or assigned to the user, so that the user can see the information without having to customize the portlet.
Open Requests by Priority	This portlet displays a graphical view of the number of open requests, grouped by assigned priority value. Use this portlet to help you visualize and group open issues.

Table 4-3. Demand-related portlets (page 2 of 3)

Portlet Name	Description
Program Risk List	This portlet lists risks associated with projects that are linked to programs. You can personalize this portlet to display risks based on project, impact, probability of occurrence, impact level or other criterion. You can configure the portlet to display only the programs that are relevant to your assigned activities.
Program Scope Change List	The Program Scope Change List portlet displays all of the scope change requests associated with projects that are linked to programs. You can configure multiple instances of this portlet for viewing different programs and the scope changes logged against their linked projects. You can personalize the portlet to display scope change requests based on criteria such as project name, severity, change request level, and so on.
Request Activity	This portlet displays general activity information such as the number of requests opened and closed during the previous two weeks, and the number of open requests. This portlet provides visibility into high traffic request types as well as the groups or users assigned to address them.
Request List	This portlet displays general request information, including description and status.
Request References	The Request References portlet lists the references attached to request based on filters such as reference type, relationship, and the time period the references were added.
Request Summary	This portlet displays information about groups of requests, including assigned priority, request type, and the total number of requests in each category. You can drill down on any request or request group.

Table 4-3. Demand-related portlets (page 3 of 3)

Portlet Name	Description
Request Summary Bar Chart	This portlet displays a bar chart that lets you see rolled up information about selected requests. To see the list of requests that a bar represents, click the bar.
Request Summary Pie Chart	This portlet displays a pie chart that presents rolled up information about requests that you select. To see the list of requests that a pie wedge represents, click the wedge.
SLA Exception Roll Up	This portlet provides a graphical display (bar chart) of all open demand under active service level agreements (SLA). The SLAs are configured using request type rules. According to your information needs, you can group the SLA information based on department, application, demand type, and other criteria. Violations are highlighted in red. To see a list of violating requests, click **View These Exceptions.**

Mercury supplies a preconfigured Demand Manager page that contains default portlets for use by demand managers. For detailed information about the Demand Manager page, and how to add it to your Dashboard, see Chapter 6, *Demand Manager Page,* on page 77.

Chapter

Integrating Requests and Projects

In This Chapter:

Overview of Integrating Requests and Projects

Customers who have both Mercury Demand Management and Mercury Project Management can integrate Demand Management's request tracking capability with Project Management's deliverable date and actuals tracking capabilities. By integrating Demand Management and Project Management, requests can be folded seamlessly into a scalable framework of interlocking initiatives.

Linking tasks to requests from Demand Management also gives instant visibility into the detailed activities that support a project. The possible relationships between projects, tasks, and requests are as follows:

- **Reference Tasks to Requests.** You can use the **References** tab on the Task Details page to link a task to new and existing requests.
- **Reference Projects from Requests.** You use the can use the **References** tab on the Task Details page to reference existing projects from requests. For information on how to reference a project from a request, see *Overview of Adding References* on page 42.
- **Reference Tasks from Requests.** You use the can use the **References** tab on the Task Details page to reference existing tasks from requests. For information on how to reference a task from a request, see *Overview of Adding References* on page 42.

As you integrate requests and projects, dependencies are established between the two entities. For example, you can specify a request as a predecessor to a package. This means that the package cannot continue along its workflow until the request is closed. *Table 5-1* lists the dependencies that you can create between requests and tasks and requests and projects.

Table 5-1. Dependency relationships

From Entity to Entity	Dependency Relationship	Description
From Request to Task	Related to this request	(Informational) The selected task is related to the request.
From Request to Project	Related to this request	(Informational) The selected project is related to the request.
From Project to Request	Related to this project	(Informational) The selected request (new or existing) is related to this project.
From Task to Request	Related to this task	(Informational) The selected request is related to the task.

For more information about relationships, see *Request Detail Page, References Section* on page 28.

Referencing Requests from Tasks

To reference a request from a task:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Project Management > Projects & Tasks > Search Projects.**

   The Search Projects page opens.
3. Enter your search criteria.
4. Click **Search.**

   The Project Search page reloads and displays the search results.
5. To open a project, from the **Project Name** list, click the project name.

6. On the **Project Summary** tab, at the top of the **Work Plan** section, click **Edit Work Plan.**

   The View Work Plan page opens to the Schedule View.

7. In the list of tasks, select the task to update, and then click the **Task Details** icon  .

   The Task Details page opens.

8. Click the **References** tab.

9. From the **New Reference** list, select **Request (Existing)** or **Request (New).**

10. **C**lick **Add.**

    If you selected **Request (Existing),** the Add Reference - Request page opens. If you selected **Request (New),** the Create New Request window opens.

11. If you selected **Request (Existing),** do the following. Otherwise, skip to step 12 on page 74.

    a. On the Add Reference: Request page, enter your search criteria, and then click **Search.**

       The **Request Search Results** section lists the requests that match your search criteria.

    b. In the **Request Search Results** section, select the checkbox for the request you want to add as a reference.

    c. Click **Add.**

       The Add Reference: Request page closes and the Task Details page opens. On the **References** tab, the **References to be added on Save** field displays the request you selected.

12. If you selected **Request (New),** do the following in the Create New Request window:

    a. In the **Request Type** field, select the request type.


Note

You can only specify the “Related to this Task” dependency between requests and tasks.

    b. Click **Create.**

       The Create New <*Request Type*> window opens.

c. Provide all required information (marked with a red asterisk) and any useful optional information, and then click **Submit.**

   The Create New <*Request Type*> window closes and the Task Details page opens. On the **References** tab, the **References to be added on Save** field displays the request you just created.

13. Click **Done.**

    The request is referenced to the task. The Task Details page closes, and the View Work Plan page opens.

14. To save your changes to the work plan, click **Done.**

Visibility into Tasks and Requests

You can view references related to your tasks and projects using the Project References portlet on your Dashboard. Add the portlet to your Dashboard, and then personalize it to show the references that are relevant to your activities. You can configure the portlet to display references based on the following:

- Reference types
- Relationship
- Time period during which they were added
- Whether they prevent actions on tasks

Chapter

Demand Manager Page

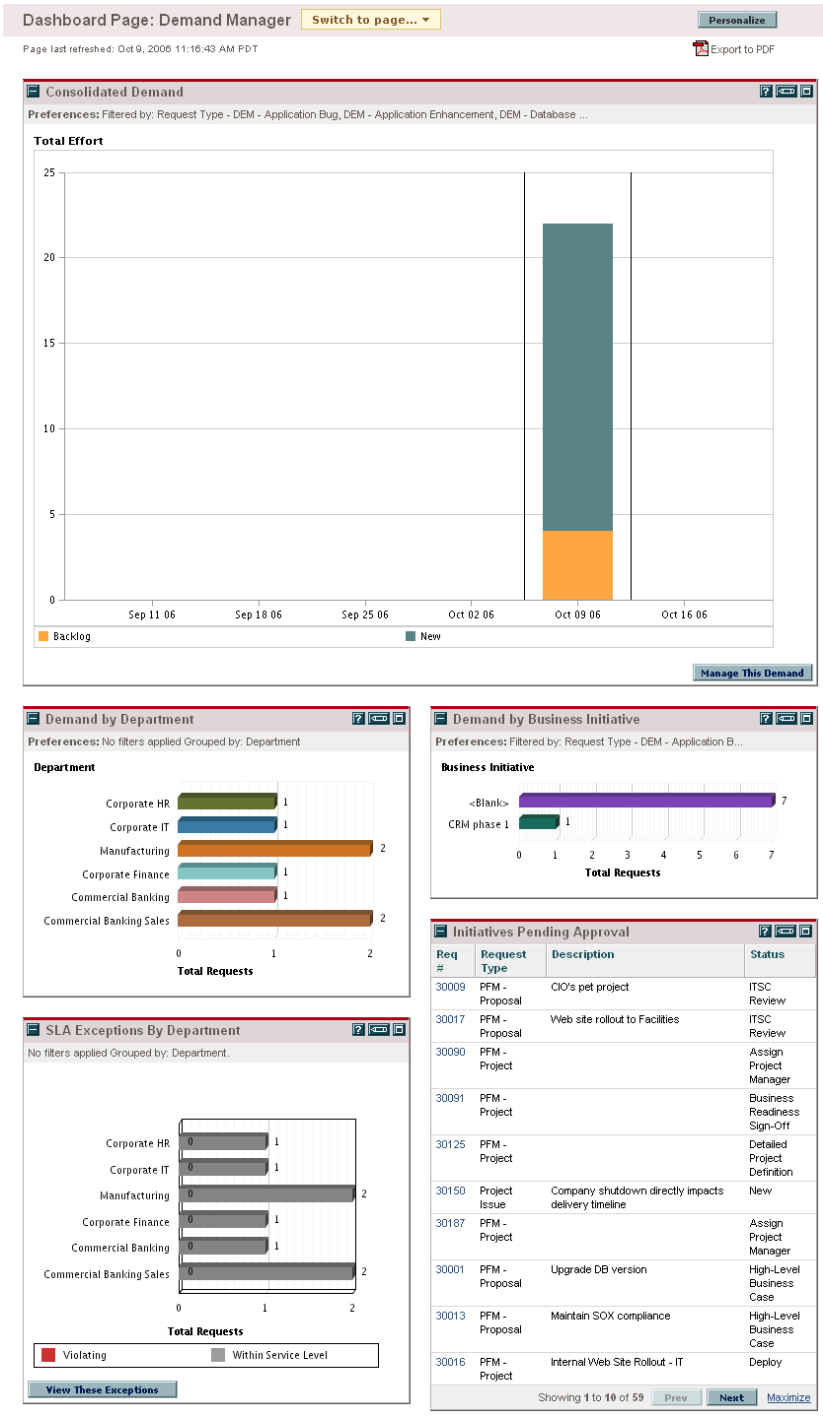
In This Chapter:

Overview of the Demand Manager Page

Demand Management comes with a preconfigured Demand Manager page (shown in *Figure 6-1* on page 79) that displays a default set of portlets for use by demand managers. You can display additional demand-related portlets on the page, and customize the data that each portlet displays, according to your information needs.

This chapter provides information about how to add the Demand Manager page to your Dashboard and how to customize the portlets displayed on the page. It also contains descriptions of the default portlets, and the demand-related portlets that you can add to the page.

Figure 6-1. Demand Manager page



Adding the Demand Manager Page to the Dashboard

To add the preconfigured Demand Manager page to your Dashboard:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**

   The Personalize Dashboard page opens.
3. Click **Add Preconfigured Pages.**

   The Add Preconfigured Pages to Dashboard page opens.
4. From the **Page Name** menu, select **Demand Manager.**

   The Demand Manager page opens.
5. Customize the page and the portlets it displays, as required.
6. To save any changes to the page and add it to your Dashboard, click **Done.**

Portlets on the Demand Manager Page

This section provides description of the default portlets displayed on the Demand Manager page. For information on how to personalize these portlets, see *Customizing Portlets* on page 84.

Consolidated Demand Portlet

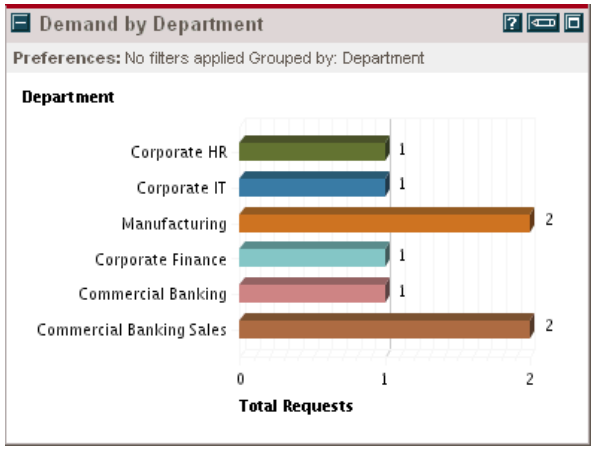
The Consolidated Demand portlet provides a graphical overview of the demand placed on your organization. Drill-down functionality lets you edit parameters.

To display descriptions of all the filter fields that you can use to configure for the Consolidated Demand portlet, at the top right corner of the portlet, click the **Help** icon.

Demand by Department Portlet

The Demand by Department portlet (*Figure 6-2*) provides a graphical summary view of different areas of demand. You can customize the portlet to display demand information based on department, demand type, priority, and so on. You can also configure the portlet to grouped information based on number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.

Figure 6-2. Demand by Department portlet



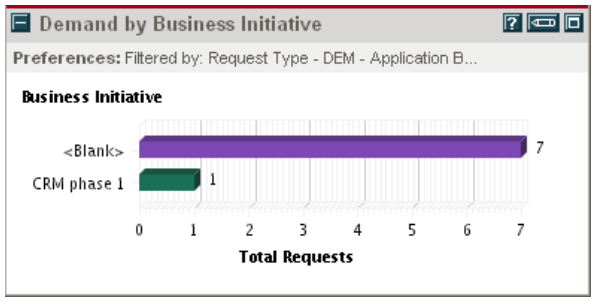
To display descriptions of all the filter fields that you can configure for the Demand by Department portlet, at the top right corner of the portlet, click the **Help** icon.

Demand by Business Initiative Portlet

The Demand by Business Initiative portlet (*Figure 6-3* on page 82) provides a graphical view of different aspects of demand. This portlet provides a summary in which demand can be grouped by department, demand type, priority, and so on.

You can also customize this portlet to display the grouped information based on the number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.

Figure 6-3. Demand by Business Initiative portlet



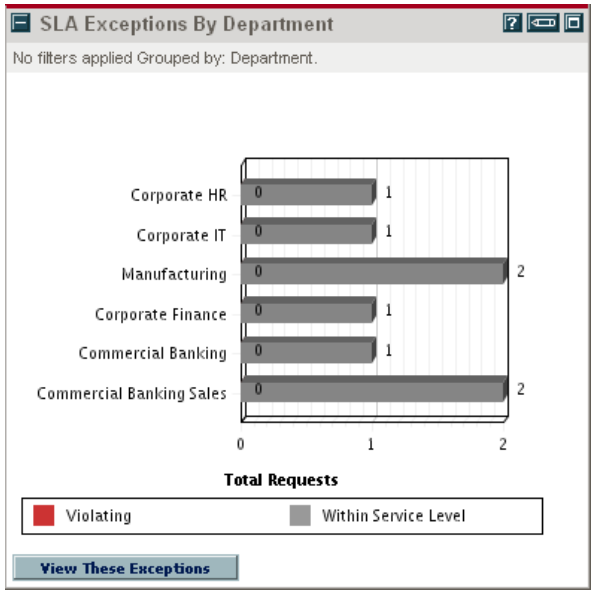
To display descriptions of all the filter fields that you can configure for the Demand by Business Initiative portlet, at the top right corner of the portlet, click the **Help** icon.

SLA Exceptions by Department Portlet

The SLA Exceptions by Department portlet (*Figure 6-4*) displays a bar chart of all open demand under service level agreements (SLA). The SLAs are configured using request type rules. The portlet displays the active SLAs related to demand, highlighting the violations in red.

To see a list of the violating requests, click **View These Exceptions.** You can personalize the SLA information displayed in this portlet by filtering demand based on department, application, demand type, and so on.

Figure 6-4. SLA Exceptions by Department portlet



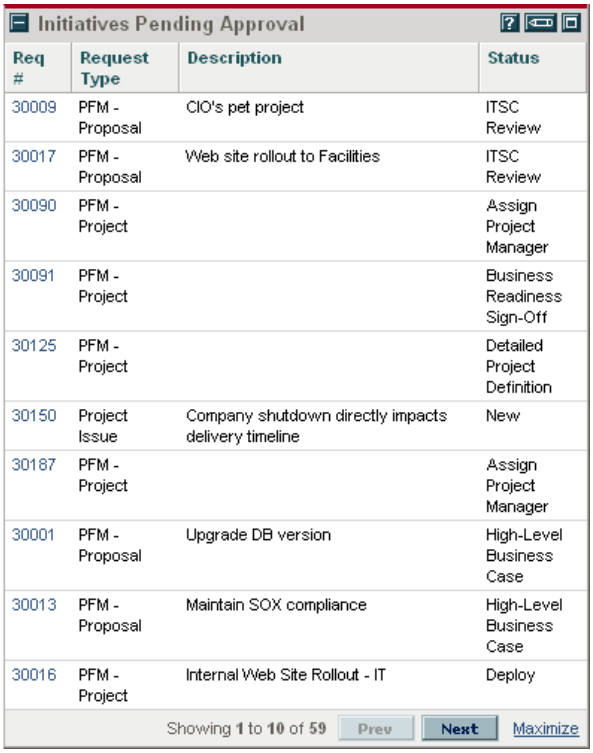
To display descriptions of all the filter fields that you can configure for the SLA Exceptions by Department portlet, at the top right corner of the portlet, click the **Help** icon.

Initiatives Pending Approval Portlet

The Initiatives Pending Approval portlet (*Figure 6-5*) displays general information about Mercury IT Governance Center 'requests, including request description and status. This portlet can be filtered for the same request criteria as the Request List portlet, but displays more detailed Request information.

You can personalize this portlet to display the same information displayed in the Request List portlet, but in more detail.

Figure 6-5. Initiatives Pending Approval portlet



To display descriptions of all the filter fields that you can configure for the Initiatives Pending Approval portlet, at the top right corner of the portlet, click the **Help** icon.

Customizing Portlets

You can change what data a portlet displays and, to some degree, how it displays the data.

To customize a portlet:

1. Log on to Mercury IT Governance Center.
2. Open the Dashboard page that displays the portlet you want to customize.
3. In the top right corner of the portlet, click the **Edit** icon.

   The Edit Preferences: <*Portlet Name*> page opens.
4. To change the portlet title displayed on the page:
   a. At the top of the page, click **Change Title.**

      The Edit Portlet Title window opens.
   b. In the **Title** field, select the current title, and then type the new title.
   c. To save the title, click **Change.**
5. In the **Preferences** and **Choose Display Columns** sections, make any necessary changes.


Note

To see a description of the controls in the **Preferences** section, return to the portlet, and, in the upper right corner, click the **Help** icon.

6. Click **Done.**

   The portlet reflects your changes.

For more information about working with portlets, see the *Configuring the Standard Interface* guide.

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