Mercury IT Governance Center™

Guide to Tracking and Managing IT Demand

Version: 6.0

The information in this document, while based on release 6.0, is generally applicable to release 7.0 of Mercury IT Governance Center. An update of this document for release 7.0 is planned for the near future.

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1

Introduction

In This Chapter:

About This Document

Information technology (IT) organizations receive demand from many different sources. Some demand is tracked in help desks, defect tracking systems, or service request systems. Often demand gets tucked away in spreadsheets, post-it notes, and emails. As a result, IT resources are pulled in many different directions and IT activities become misaligned with business requirements.

Mercury Demand Management™ is a Mercury IT Governance Center™ product that provides a single application and repository to capture all demand placed on an IT organization. Mercury IT Governance Center consolidates information from the many different sources so you can both view aggregate demand in real time and report against it. Standard demand categories allow IT organizations to normalize the demand from different sources. This helps ensure the right people are working on the right activities.

The following is a list of the chapters that make up this document. Each chapter has a brief summary of the information covered.

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  This chapter presents an overview of how Mercury Demand Management tracks and manages IT.

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  Mercury Demand Management provides a number of tools to track and manage IT demand. These tools include menus, pages, Mercury IT Governance Dashboard™ pages, and portlets.

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  Demand on an IT group can be analyzed, managed, assigned to users, scheduled, and rejected. This chapter discusses how to perform these tasks.

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  This chapter lists the Mercury Demand Management portlets for IT demand tracking and management.

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  This chapter lists the available reports.

Who Should Read This Guide

The intended audience for this guide includes:

- Managers who analyze and manage IT demand
- Business users responsible for reporting on IT demand

Prerequisite Documents

Prerequisite documents for this guide are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*
- *Mercury Demand Management User's Guide*

For More Information

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

Related Documents

Related documents for this document are:

- *Configuring IT Demand Tracking and Management*

For More Information

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

Overview of Tracking and Managing IT Demand

IT groups receive requests for help from many different sources. Some requests are tracked in help desks, defect tracking systems or service request systems. Often requests get tucked away in spreadsheets, post-it notes, e-mails, and voice mailboxes. When requests for help come from a variety of sources, managing those requests can become a challenge. Oftentimes, the result is that IT resources are pulled in many different directions, resources are busy and overworked, which results in IT activities becoming misaligned with the needs of the business.

Mercury Demand Management provides a single point of contact for all requests placed on an IT group. Mercury Demand Management consolidates requests from the many different sources, so that IT managers and others responsible for managing and tracking IT requests for help can view the demands placed on an IT group in real time.

The Mercury IT Demand Management solution uses the existing Mercury Demand Management functionality (see *Figure 1-1*). Mercury Demand Management provides standard IT demand categories that allow IT groups to normalize the various requests for help. Mercury Demand Management also provides the tools required to track, analyze, schedule, and resolve requests.

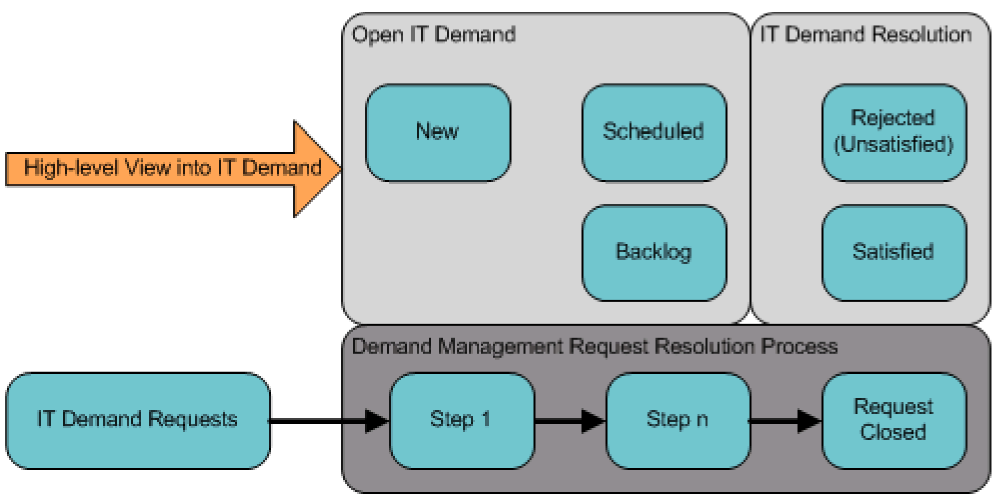


Figure 1-1. IT Demand Management process

Use the Mercury IT Demand Management solution to:

- Capture all IT demand from all sources
- Capture and enforce processes
- Standardize IT demand
- Manage and schedule the demand on your organization

Demand Management Terms and Concepts

The following defines terms and concepts associated with Mercury Demand Management. Knowing these terms and concepts is needed to fully understand the Mercury IT Demand Management solution.

Demand Disposition

Demand disposition represents the current state of the IT demand. IT demand can be categorized as follows:

- New
- Scheduled
- Backlog

Demand Fields and Demand Sets

Different groups within your company might need to track different sets of IT demand. For example, your R&D department might need to track the IT demand from product bug and enhancement requests. The IS department might need to track IT demand from help desk requests. To enable this separation of IT demand, the Mercury IT Demand Management solution includes the concept of demand sets.

Demand sets are self-contained configurations for the Mercury IT Demand Management solution. Demand sets allow multiple groups within an organization to track and manage IT demand in a way that best suits their business needs. In essence, demand sets are groups of demand fields. Each demand set group corresponds to a set of IT demand request types. Each demand field corresponds to a field that can be found on each of the IT demand request types (see *Figure 1-2*).

Demand sets are a way to normalize the common fields in each of the IT demand request types. In addition to providing a consistent, normalized set of IT demand, demand fields also provide you visibility into your IT demand.

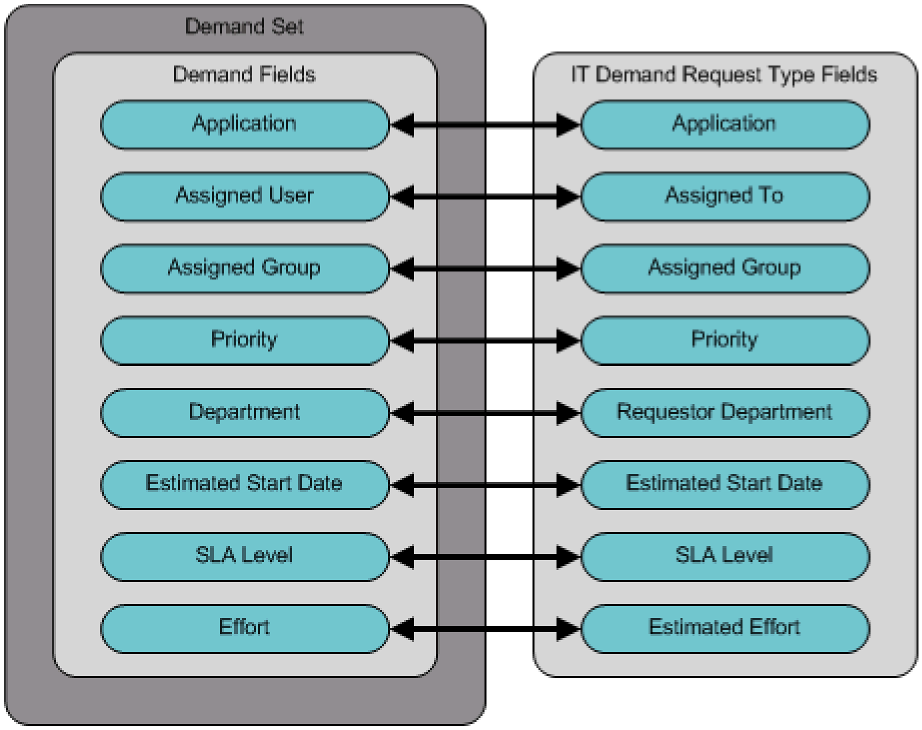


Figure 1-2. Demand set field and IT demand request type field mapping

IT Demand Request Types

The Mercury IT Demand Management solution is designed to be integrated with existing Mercury Demand Management request resolution systems. The Mercury IT Demand Management solution offers a specific kind of request, called an IT demand request. When you create an IT demand request, you create IT demand. IT demand requests are designed specifically for information technology groups. For example, a common request of IT groups is for a database refresh. The Mercury IT Demand Management solution has a Mercury-supplied IT demand request specifically just for database refreshes (DEM - Database Refresh). When an IT demand request is created, the IT demand can be tracked and managed.

The Mercury IT Demand Management solution includes four predefined IT demand request types. The IT demand request type definitions control much of the request-specific logic in the tracking and managing process. This includes such things as:

- Defaulting to a specific workflow to use when processing an IT demand request
- Custom field definitions and behaviors
- Layout
- Data access and security (who can view or edit the IT demand request)
- Configuration security (who can alter the IT demand request type)
- Notifications

Each Mercury-supplied IT demand request type corresponds to a Mercury-supplied IT demand workflow. When IT demand is created, the corresponding IT demand workflow is attached to the newly created IT demand. *Table 1-1* lists the IT demand request types, their definitions, and the associated IT demand workflow.

Table 1-1. IT demand request types and workflows

IT Demand Request Type	Definition	IT Demand Workflow
DEM - Application Bug	Used to report problems in current IT applications.	DEM - Bug Request Workflow
DEM - Application Enhancement	Used to request new functionality in current IT applications.	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.	DEM - Database Refresh
DEM - Initiative	Used to request key projects for future quarters, contingent upon management approval from key stakeholders.	DEM - Project Initiative Process

SLAs

The Mercury IT Demand Management solution tracks and reports on service level agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time for items being managed using Mercury Demand Management.

Mercury IT Demand Management Solution Requests

The Mercury IT Demand Management solution is designed to be integrated with existing Mercury Demand Management request resolution systems. In typical Mercury Demand Management request resolution systems, when you need something, want something, or report something, you create a request. The same is true for the Mercury IT Demand Management solution. The only difference between Mercury Demand Management requests and Mercury IT Demand Management solution requests are the addition of scheduling and SLA fields found on Mercury IT Demand Management solution requests.

For information on how to create requests, see the *Mercury Demand Management User's Guide*.

Additionally, the management of Mercury IT Demand Management solution requests is identical to that of Mercury Demand Management requests. The management of requests includes such things as:

- Printing requests
- Cancelling requests
- Reopening closed requests
- Deleting requests
- Purging requests

For information on how to the manage requests, see the *Mercury Demand Management User's Guide*.

Chapter

2

Interface Options for Managing Demand

In This Chapter:

Menus for Managing IT Demand

The Mercury IT Demand Management solution provides menus to manage your IT demand. Using these menus requires the correct access grants and security group permissions. If you do not have the following menus as part of your menu bar, see your application administrator.

Overview of the Demand Management Menu

The Mercury IT Demand Management solution adds the **Demand** menu to the standard interface menu bar. From the **Demand** menu, you can do the following:

- View IT demand
- Manage IT demand
- Schedule IT demand
- Analyze IT demand
- Run IT demand reports
- Administer the IT demand process

Table 2-1 defines the components of the **Demand** menu.

Note

These menu items might vary slightly depending on the on-site configuration during installation of the Mercury IT Demand Management solution.

Table 2-1. Default Demand menu

Menu Group	Menu Item	Description
Demand	Manage Consolidated Demand	Analyzes the IT demand placed on your organization. You can also click on the graph to schedule or reject a portion of the IT demand. For more information, see *Overview of the Manage Consolidated Demand Page* on page 21.
	Schedule Demand	Schedules when the IT demand will be fulfilled. You can also select to reject the IT demand. For more information, see *Overview of the Schedule Demand Page* on page 23.
	Analyze Demand by Category	Analyzes the current IT demand using a set of filters and display parameters. For more information, see *Overview of the Analyze Demand by Category Page* on page 24.
Reports	Demand Creation History	Submits the DEM - Demand Creation History report.
	Satisfied Demand History	Submits the DEM - Satisfied Demand History report.
	Historical SLA Violations	Submits the DEM - Historical SLA Violations report.
Administration	Demand Sets	Configures demand sets. This includes adding request types to your demand sets and mapping demand fields to IT demand request type fields.
	Bug Fix Process	Opens the DEM - Bug Request workflow in the Workbench.
	Enhancement Process	Opens the DEM - Enhancement Request Process workflow in the Workbench.
	Initiative Process	Opens the DEM - Project Initiative Process workflow in the Workbench.

Note

Menu items in the **Administration** menu group should only be used by advanced users and application administrators.

Overview of the Team Manager Menu

The Mercury IT Demand Management solution also adds the **Team Manager** menu to the standard interface menu bar. From the **Team Manager** menu, you can do the following:

- View IT demand
- Manage IT demand
- Schedule IT demand
- Analyze IT demand
- Run Demand Management reports

Table 2-2 defines the **Team Manager** menu items.

Table 2-2. Default Team Manager menu

Menu Group	Menu Item	Description
Demand	Manage Consolidated Demand	Analyzes the IT demand placed on your organization. You can also click on the graph to schedule a portion of the IT demand. For more information, see *Overview of the Manage Consolidated Demand Page* on page 21.
	Schedule Demand	Schedules when the IT demand will be fulfilled. You can also select to reject the IT demand. For more information, see *Overview of the Schedule Demand Page* on page 23.
	Analyze Demand by Category	Analyzes the current IT demand using a set of filters and display parameters. For more information, see *Overview of the Analyze Demand by Category Page* on page 24.
Reports	Demand Creation History	Submits the DEM - Demand Creation History report. For more information, see *Reports by Category* on page 53.
	Satisfied Demand History	Submits the DEM - Satisfied Demand History report. For more information, see *Reports by Category* on page 53.

Understanding IT Demand Using Pages

The Mercury IT Demand Management solution provides specific demand task-oriented pages to manage your IT demand. These task-oriented pages can be reached using the **Demand** and **Team Manager** menus.

Overview of the Manage Consolidated Demand Page

The Manage Consolidated Demand page provides a graphical view of the IT demand in terms of effort. Click on the different elements of the graph to schedule that IT demand element. You can also use this page to graphically analyze your IT demand. To do so, select the demand set, desired filters, a time-frame, and specify a grouping.

To open this page, from the menu bar, select **Demand > Manage Consolidated Demand.** You can enter filter criteria to graphically display a smaller, more focused, number of items. You can also specify the Group By, which updates the graph with the appropriate demand category presentation. *Figure 2-1* shows the Manage Consolidated Demand page.

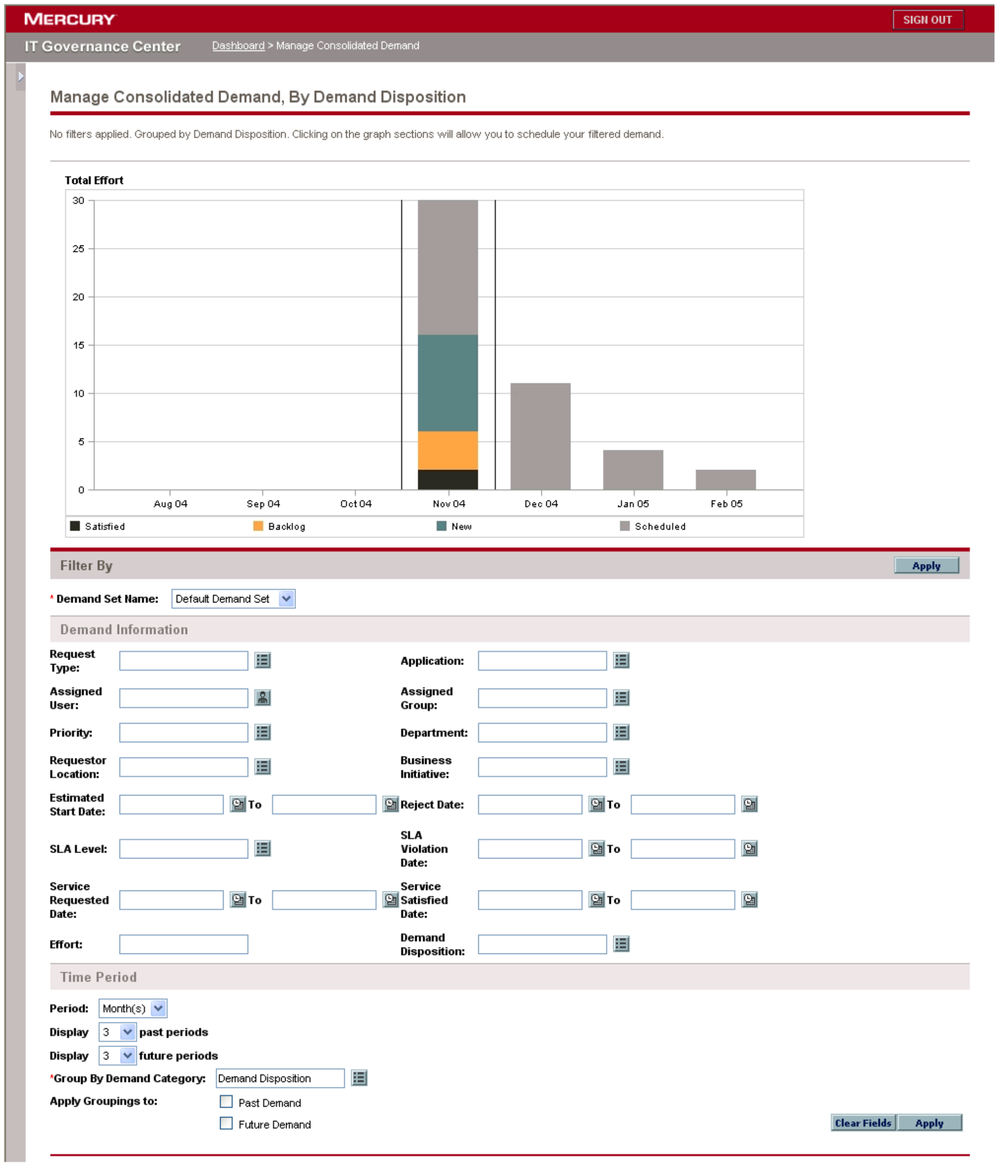


Figure 2-1. Manage Consolidated Demand page

Note

Changes to the Manage Consolidate Demand page are not exported to the Consolidated Demand portlet.

Overview of the Schedule Demand Page

The Schedule Demand page is used to schedule or reject IT demand. This page can be accessed by clicking the graph on the Manage Consolidated Demand page, or by selecting **Demand > Schedule Demand** from the menu bar. You can enter filter criteria to graphically display a smaller, more focused, number of items. You can also specify the Group By, which updates the list with the appropriate IT demand category presentation. *Figure 2-2* shows the Schedule Demand page.

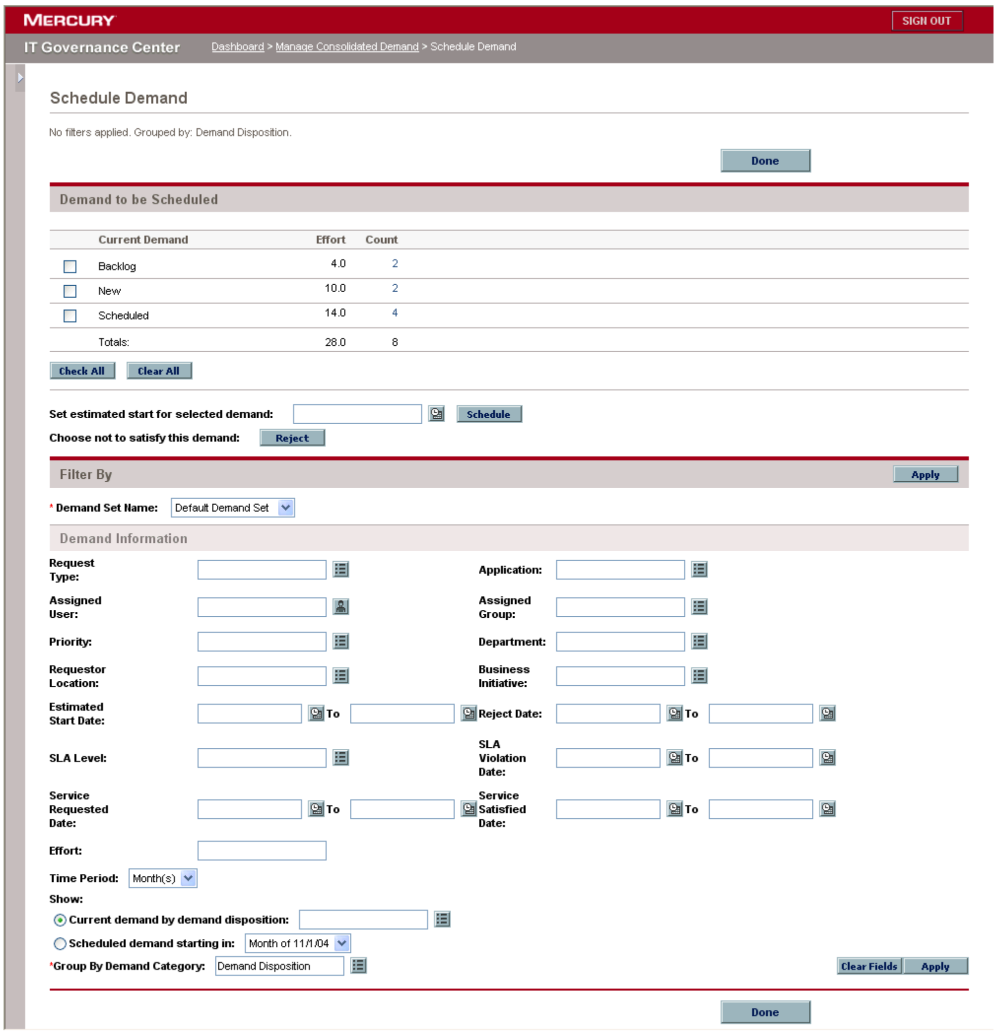


Figure 2-2. Schedule Demand page

Overview of the Analyze Demand by Category Page

The Analyze Demand by Category page provides a graphical view of the IT demand in terms of the number of requests. This page can be accessed by selecting **Demand > Analyze Demand by Category** from the menu bar. You can select to view the IT demand associated with an alternate demand set by selecting another set from the Demand Set field. You can then enter filter criteria to graphically display a smaller, more focused, number of items. You can also specify the Group By, which updates the graph with the appropriate Demand Category presentation. *Figure 2-3* shows the Analyze Demand by Category page.

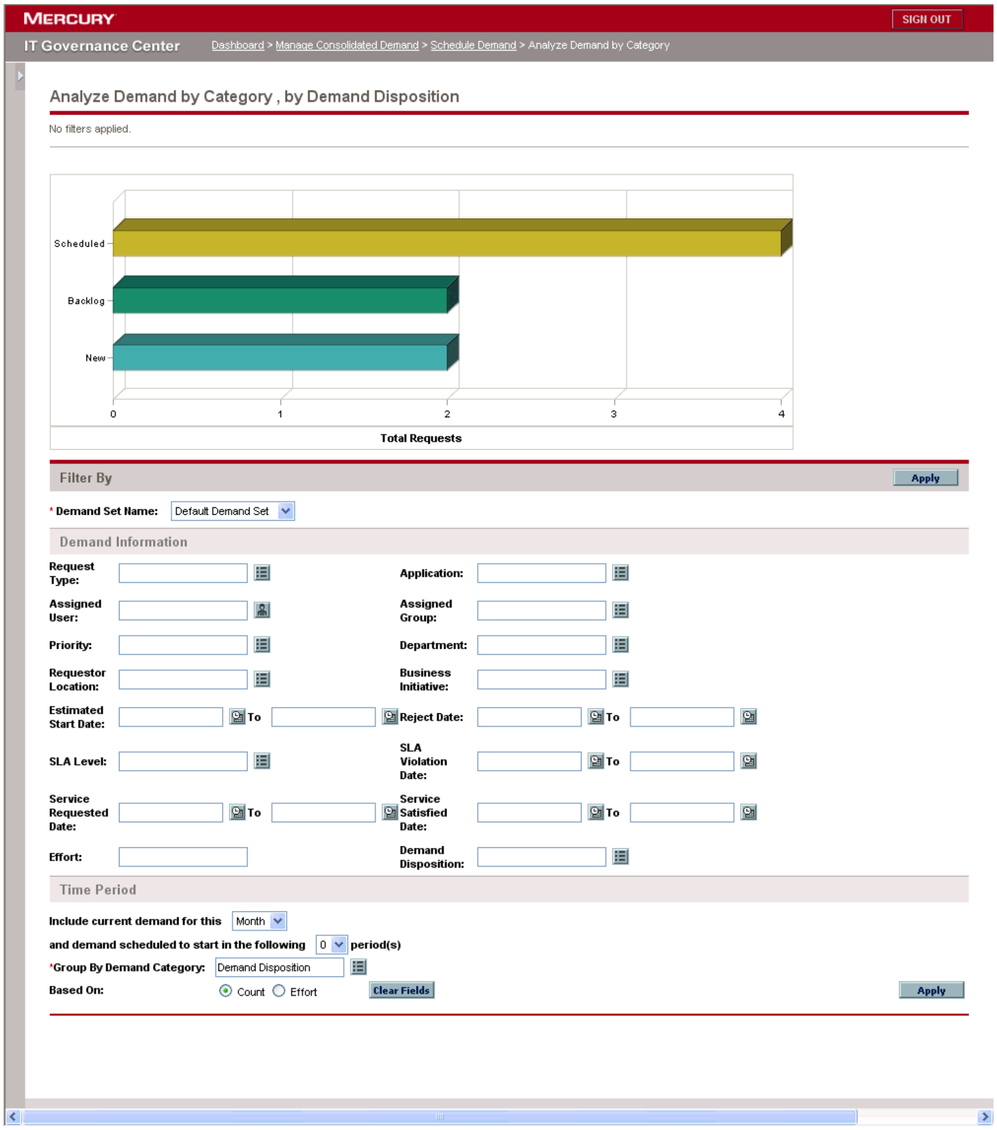


Figure 2-3. View Demand By Category page

Dashboard Pages for Managing IT Demand

The Mercury IT Demand Management solution provides Dashboard pages to manage your IT demand. These IT demand Dashboard pages can consist of one or more Dashboard pages, each with a set of configured IT demand portlets. Adding these IT demand Dashboard pages to your Dashboard requires the correct access grants and security group permissions. If you do not have access to the IT demand Dashboard pages, see your application administrator.

Overview of the Demand Manager Dashboard Page

The Demand Manager Dashboard page provides an overview of the IT demand placed on an entire organization. This Dashboard page includes a number of portlets that provide an overview of the various IT demand activities in your organization. *Figure 2-4* shows the Demand Manager Dashboard page. The following is a list of the portlets included on the Demand Manager Dashboard page:

- **Consolidated Demand portlet.** The Consolidated Demand portlet provides a graphical overview of the IT demand placed on your organization. For more information, see *IT Demand Portlets* on page 51.
- **Demand by Department portlet.** The Demand by Department portlet is a personalized version of the Demand by Category portlet. The Demand by Category portlet provides a quick view into different areas of your IT demand, such as organizing the display of IT demand by department. For more information, see *IT Demand Portlets* on page 51.
- **Demand by Business Initiative portlet.** The Demand by Business Initiative portlet is a personalized version of the Demand by Category portlet. The Demand by Category portlet provides a quick view into different areas of your IT demand, such as organizing the display of the IT demand by business initiative. For more information, see *IT Demand Portlets* on page 51.
- **SLA Exceptions by Department portlet.** The SLA Exception Roll Up portlet lists the open IT demand requests that have triggered SLA exceptions. For more information, see *IT Demand Portlets* on page 51.
- **Initiatives Pending Approval portlet.** The Initiatives Pending Approval portlet is a personalized version of the Request List portlet. The Request List portlet displays general information about IT demand requests, such as their description and status. For information concerning the Request List portlet, see the *Mercury Demand Management User's Guide*.

Figure 2-4. Demand Manager Dashboard page

Overview of the Team Manager Dashboard Page

The Team Manager Dashboard page provides a view of the IT demand that would be of interest to those managing IT demand. This Dashboard page includes a number of portlets that provide an overview of the various IT demand activities in your organization. *Figure 2-5* shows the Team Manager Dashboard page. The following is a list of the portlets included on the Team Manager Dashboard page:

- **Team Assignment Queue portlet.** The Team Assignment Queue portlet is a personalized version of the Assignment Queue portlet. The Assignment Queue portlet provides a personalized view into the IT demand that has not been assigned to a resource, as well as assigning a resource to an IT demand. For more information, see *IT Demand Portlets* on page 51.
- **Team Demand by Priority portlet.** The Team Demand by Priority portlet is a personalized version of the Demand by Category portlet. The Demand by Category portlet provides a quick view into different areas of your IT demand, such as organizing the display of the IT demand by Priority. For more information, see *IT Demand Portlets* on page 51.
- **Team SLA Exceptions by Department portlet.** The Team SLA Exceptions by Department portlet is a personalized version of the SLA Exceptions by Department portlet. The SLA Exception Roll Up portlet lists the open requests that have triggered SLA exceptions. For more information, see *IT Demand Portlets* on page 51.
- **In Process Demand portlet.** The In Process Demand portlet is a personalized version of the Request List portlet. The Request List portlet displays general information about requests, such as their description and the status of the IT demand in the workflow. For information concerning the Request List portlet, see the *Mercury Demand Management User's Guide*.

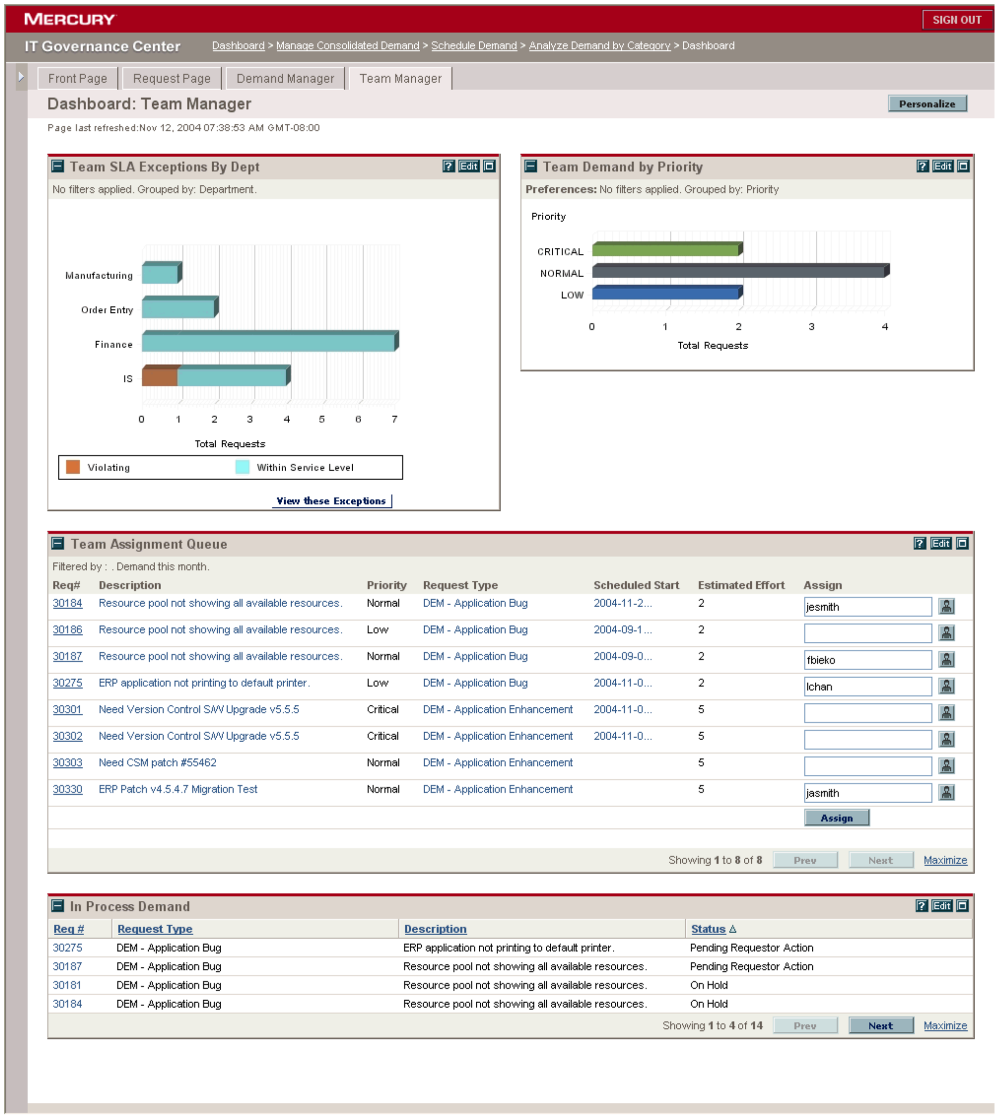


Figure 2-5. Team Manager Dashboard page

Portlets for Managing IT Demand

The Mercury IT Demand Management solution provides portlets to manage your IT demand. These IT demand portlets are included in the Demand Manager and Team Manager Dashboard pages. Adding these IT demand portlets to your Dashboard requires the correct access grants and security group permissions. If you do not have access to the IT demand portlets, see your application administrator.

Understanding the Consolidated IT Demand Portlet

The Consolidated Demand portlet on the Demand Manager page displays IT demand disposition data in a bar chart format. Placing the cursor over a bar opens a tooltip window, listing more precise information concerning the IT demand data (see *Figure 2-6*). Clicking **Manage this Demand** opens the Manage This Demand page.

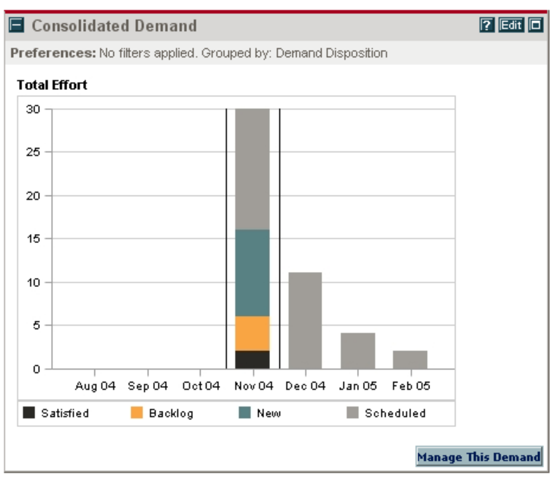


Figure 2-6. Consolidated Demand portlet

The Consolidated Demand portlet can be configured to display a wide range of IT demand related data, including displaying IT demand by assigned user and IT demand by department. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

Understanding the Demand List and Request List Portlets

The following portlets are used to view lists of IT demand:

- **Demand List portlet.** The Demand List portlet does not appear on either the Demand Manager or Team Manager page. The Demand List portlet must be added to a Dashboard page.
- **Request List portlet.** The Request List portlet is personalized as the In Process Demand portlet on the Team Manager page. The Request List portlet is also personalized as the Initiatives Pending Approval portlet on the Demand Manager page.

These portlets display IT demand related data in a column and row format. *Figure 2-7* shows the In Process Demand portlet.

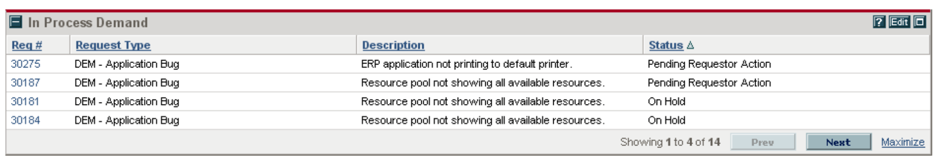


Figure 2-7. In Process Demand portlet

In addition to the data displayed in the portlet, you can drill down to the demand’s detail page by clicking the linked request number (see *Figure 2-8*).

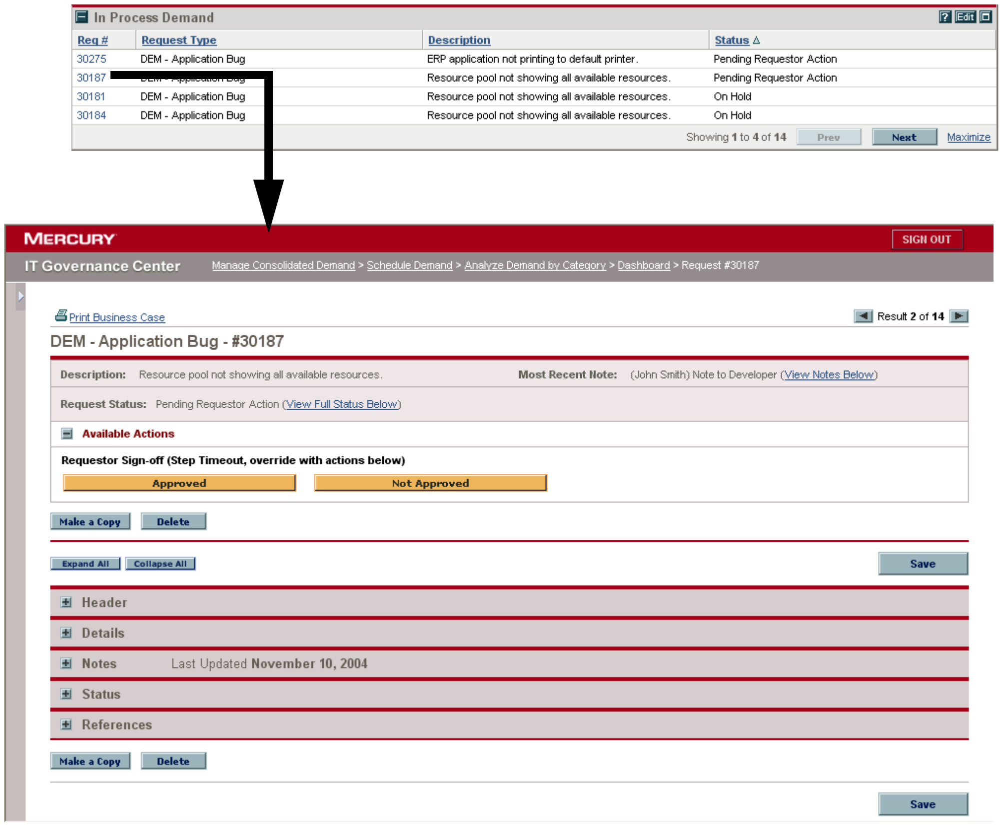


Figure 2-8. Viewing Demand from the Demand List portlet

These portlets can be personalized to display a wide range of demand related data. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

Understanding the Demand by Category Portlet

The Demand by Category portlet is personalized to view IT demand data as the Demand by Disposition and Demand by Business Initiative portlets on the Demand Manager page and the Team Demand by Priority portlet on the Team Manager page.

These portlets display IT demand data in a bar chart format. Placing the cursor over a bar opens a tooltip window, listing more precise information concerning the IT demand data (see *Figure 2-9*).

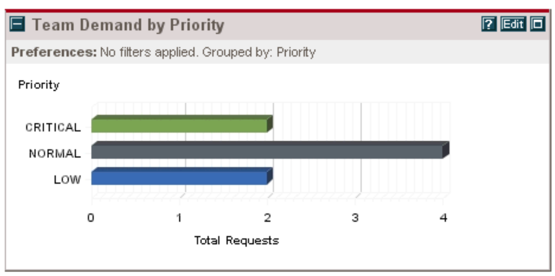


Figure 2-9. Team Demand by Priority portlet

The Demand by Category portlet can be configured to display a wide range of IT demand-related data (see *Figure 2-10*). The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

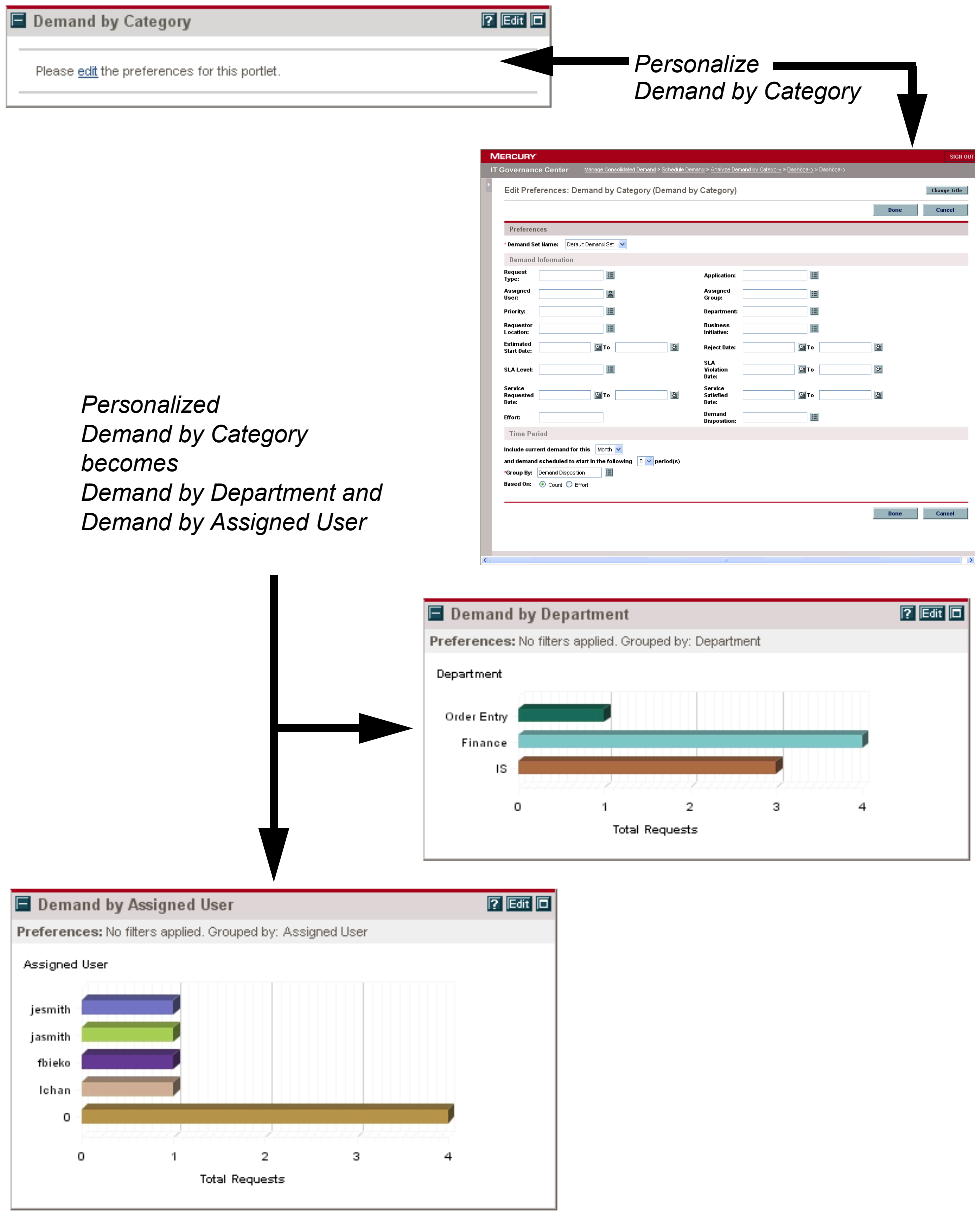


Figure 2-10. Personalizing the Demand by Category portlet

Understanding the Team Assignment Queue Portlet

The Team Assignment Queue portlet displays IT demand data in a column and row format. From this portlet, you can view and assign a user to the IT demand. For more information concerning assigning users to an IT demand, see *Assigning IT Demand* on page 42.

In addition to the data displayed in the portlet and assigning users to the IT demand, you can drill-down to the IT demand's Request page by clicking the linked request number (see *Figure 2-11*).

This portlet can be personalized to display different views of IT demand related data. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

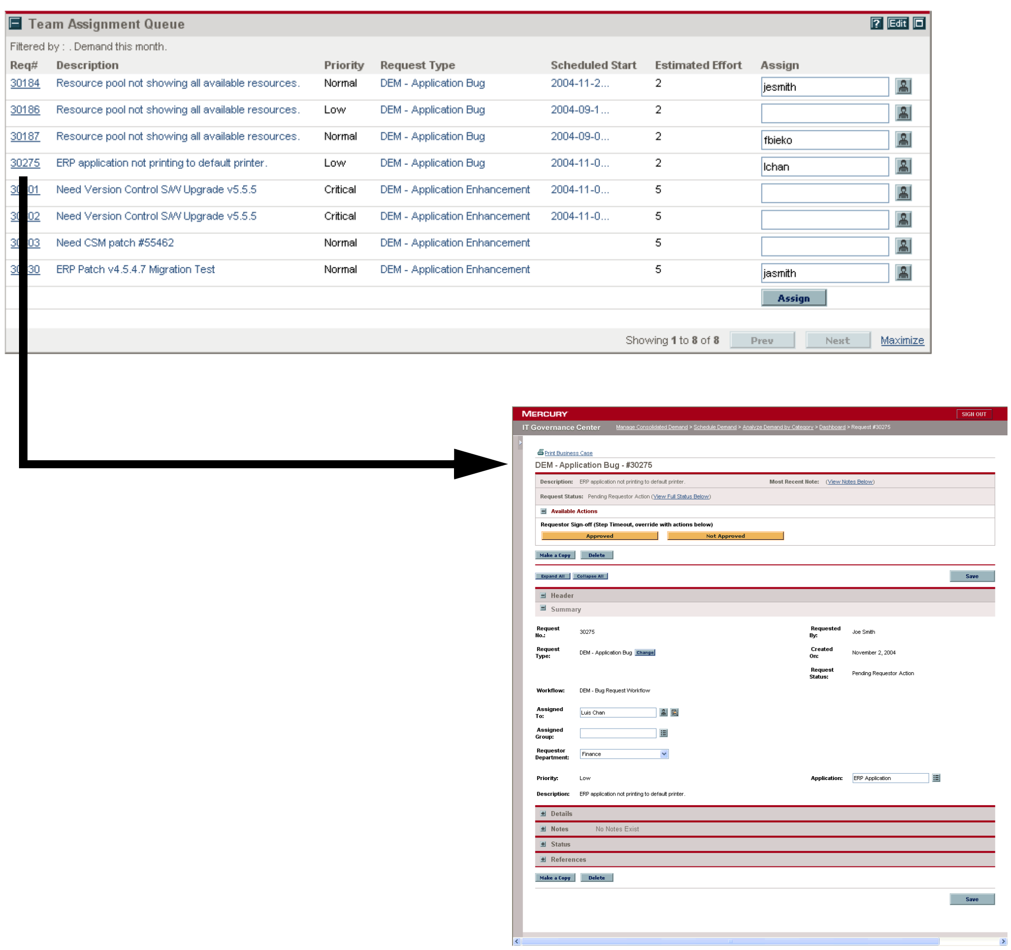


Figure 2-11. Viewing IT demand from the Team Assignment Queue portlet

Understanding the SLA Exception Roll Up Portlet

The SLA Exception Roll Up portlet is personalized to view IT demand data as the SLA Exceptions By Department portlet on the Demand Manager page and the Team SLA Exceptions By Department portlet on the Team Manager page.

These portlets display SLA data in a bar chart format. Placing the cursor over a bar opens a Tooltip window, listing more precise information concerning the SLA data. Additionally, clicking the **View these Exceptions** button opens the SLA Exceptions page (see *Figure 2-12*).

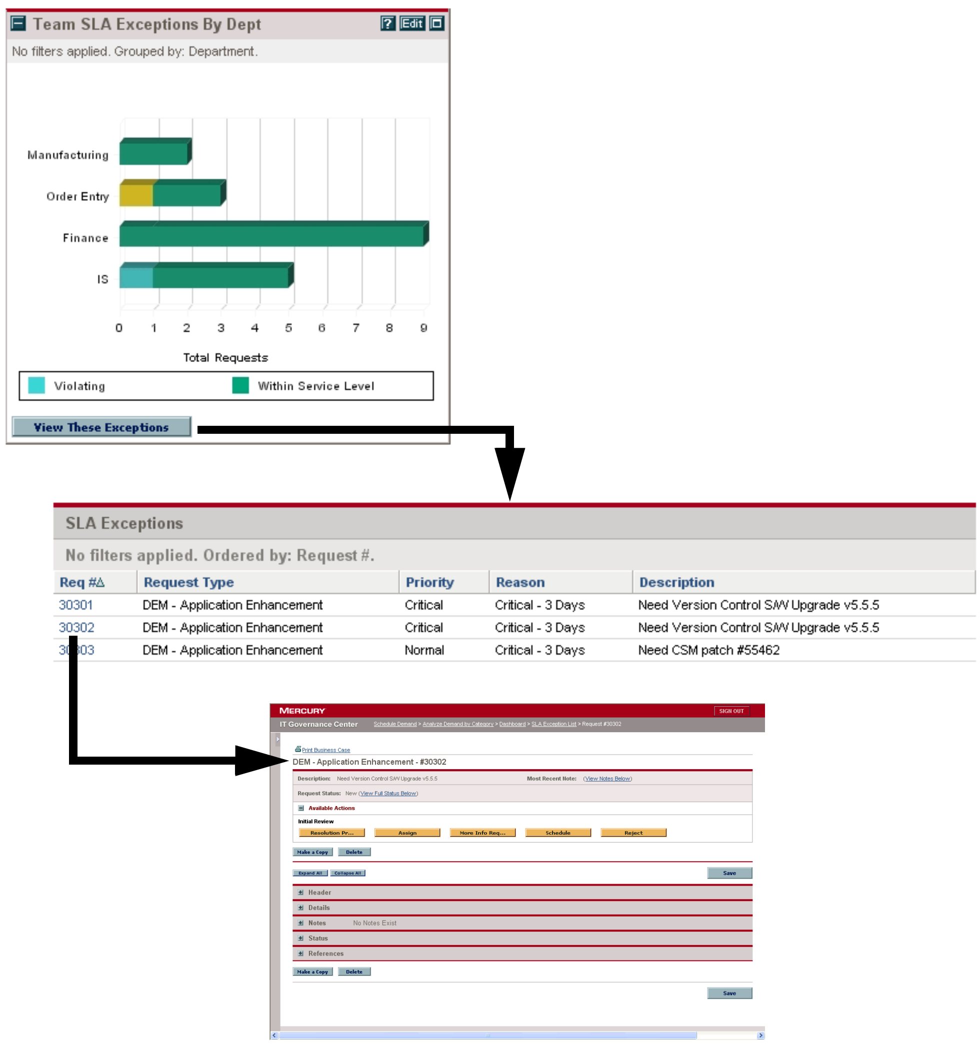


Figure 2-12. Viewing SLAs from the SLA Exception Roll Up portlet

The SLA Exception Roll Up portlet can be personalized to display a wide range of SLA related data. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

Chapter

3

Processing IT Demand

In This Chapter:

Overview of Analyzing IT Demand

The Analyze Demand by Category page provides a graphical view of IT demand in terms of the number of IT demand requests. Placing the cursor over a section of the bar opens a tooltip window, listing more precise information concerning the IT demand data.

The Analyze Demand by Category page can be configured to display a range of IT demand related data, including displaying IT demand by assigned user and IT demand by department. The displayed information can be filtered using the Filter By parameters.

To analyze IT demand:

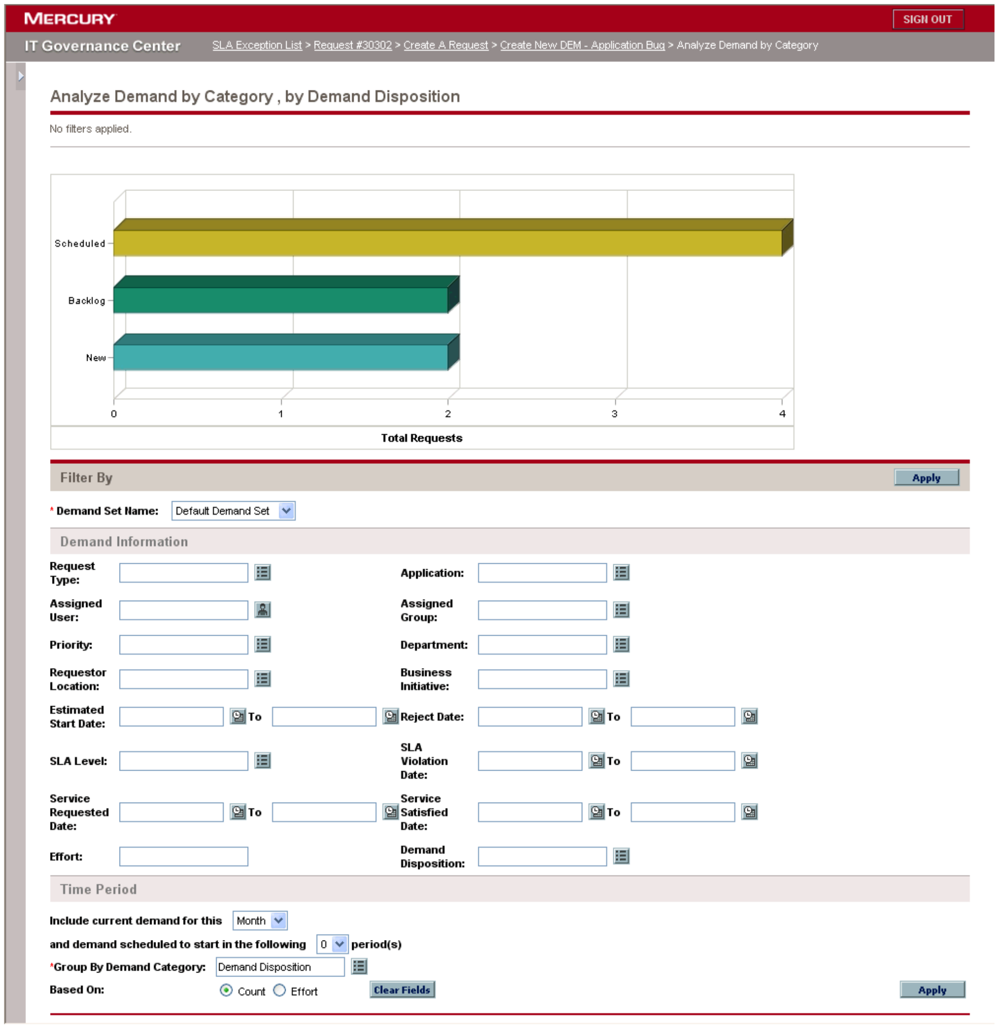
1. Log on to the Mercury IT Governance Center.

   For instruction on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

   The standard interface opens.

2. From the menu bar, select **Demand > Analyze Demand by Category.**

   The Analyze Demand by Category page displays.



3. In Demand Set Name, select the demand set to analyze.

4. In the Filter By section, complete the remaining fields as needed and click **Apply.**

   The filter fields determine what IT demand data is displayed and how the displayed IT demand data is organized. The graphic at the top of the page is updated with the applied filter fields and display information. Changing the entries in the Demand Information section changes the IT demand data. On the Manage Consolidated Demand page, IT demand is always presented in terms of the number of IT demand requests. Changing the entries in the Time Period section changes the time range of the IT demand data.

Assigning IT Demand

You can assign who will be working on the IT demand using the Assignment Queue portlet. The Assignment Queue portlet can be found on the Team Manager Dashboard page. You can also add the Assignment Queue portlet to a Dashboard page. Additionally, if the assigned workflow is configured to include an IT demand assignment workflow step, assigning a resource using the Assignment Queue portlet will satisfy the assignment workflow step.

To assign a user to an IT demand:

1. Log on to the Mercury IT Governance Center.

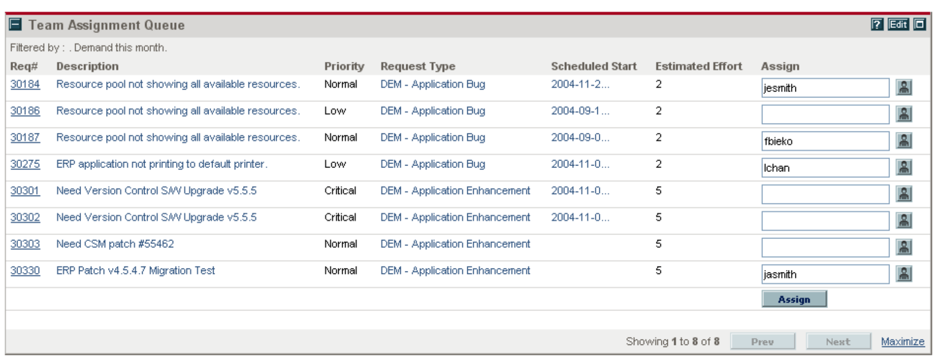
   For instruction on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

   The standard interface opens.

2. Open the Team Manager Dashboard page.

3. In the Team Assignment Queue portlet, click the **Assign To** icon in the Assign column.

   The Assign To single-select auto-complete window opens.



4. In the Assign To single-select auto-complete window, click an entry.

   The selected user is entered in the Assign field.

5. In the Assignment Queue portlet, click **Assign.**

   The selected user is assigned to the IT demand.

Analyzing IT Demand

The Manage Consolidated Demand page provides a graphical view of IT demand in terms of effort. IT demand can be analyzed, scheduled or rejected through the Manage Consolidated Demand page. Placing the cursor over a section of the bar opens a tooltip window, listing more precise information concerning the IT demand data. Clicking on the graph's sections open the Schedule Demand page, allowing you to schedule or reject the selected IT demand (see *Figure 3-1*).

The Manage Consolidated Demand page can be configured to display a range of IT demand related data, including displaying IT demand by assigned user and IT demand by department. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

Often, the workflow associated with the IT demand is configured to include managing activities including scheduling and rejecting the IT demand. Scheduling or rejecting IT demand using the Manage Consolidated Demand page will satisfy the requirements of the workflow and continue moving the IT demand through the workflow process.

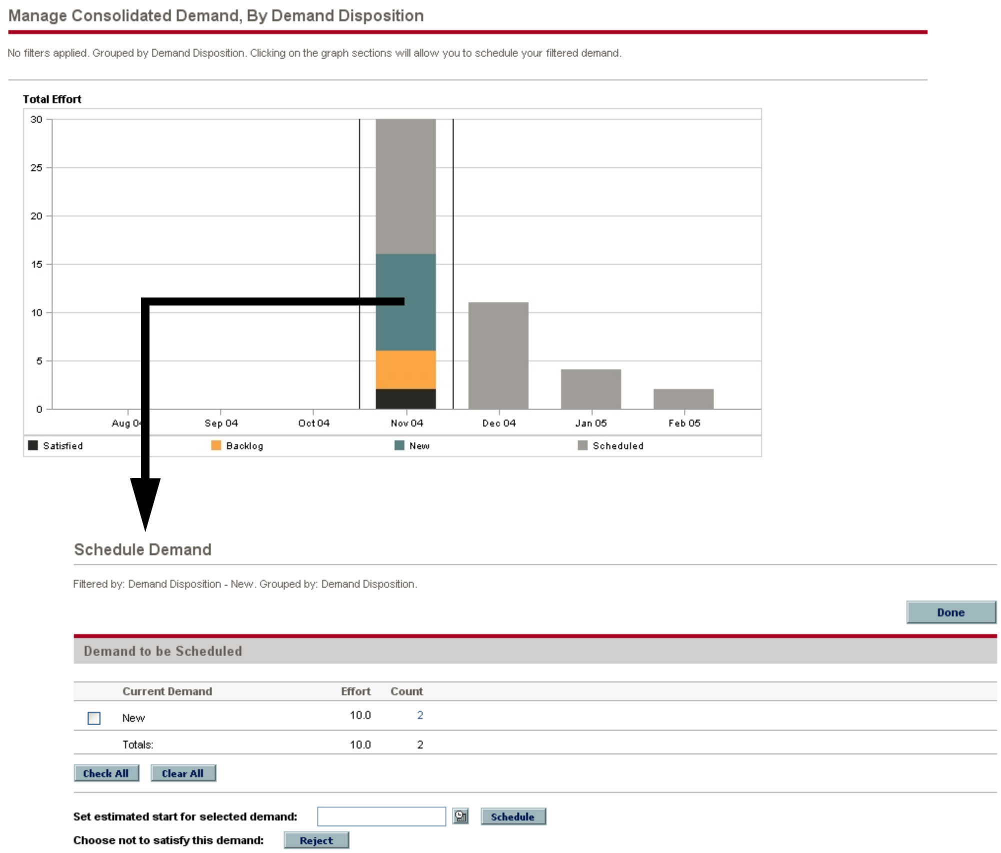


Figure 3-1. Manage Consolidated Demand page

To manage consolidated IT demand:

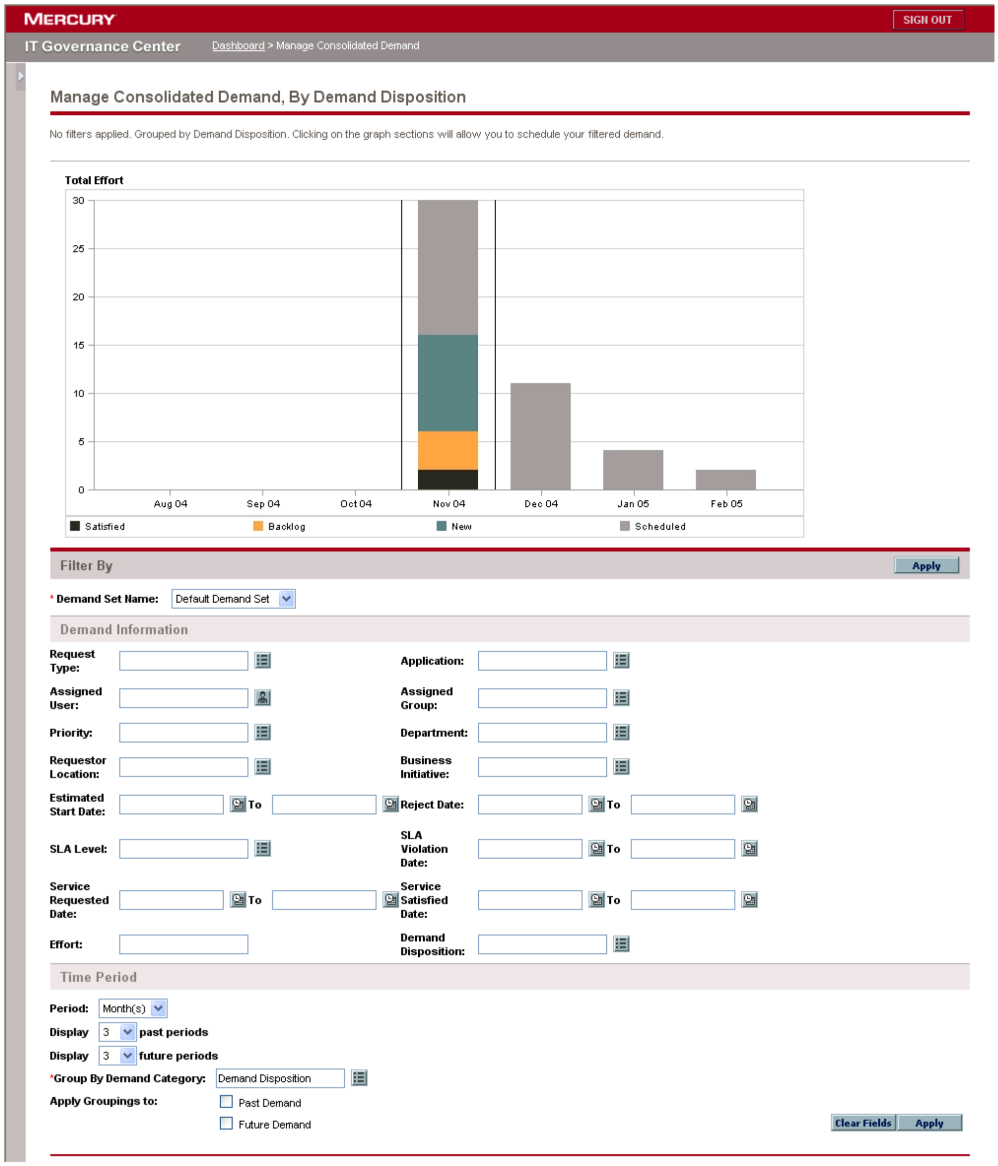
1. Log on to the Mercury IT Governance Center.

   For instruction on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

   The standard interface opens.

2. From the menu bar, select **Demand > Manage this Demand.**

   The Manage Consolidated Demand page appears.



3. In Demand Set Name, select the demand set to analyze.
4. In the Filter By section, complete the remaining fields as needed and click **Apply.**

For More Information

For more information on how to schedule and reject IT demand, see the next section (*Scheduling and Rejecting IT Demand*).

Scheduling and Rejecting IT Demand

When analyzing your IT demand, you might decide to reject some of those IT demands. The remaining IT demand can be scheduled to begin at a later date, when the appropriate resources are available. By scheduling IT demand, you can normalize the demand being placed on your IT group.

The Schedule Demand page is used to schedule and reject IT demands. Often, the workflow associated with the IT demand is configured to include managing activities including scheduling and rejecting the IT demand. Scheduling or rejecting IT demand using the Schedule Demand page will satisfy the requirements of the workflow and continue moving the IT demand through the workflow process.

To schedule or reject an IT demand:

1. Log on to the Mercury IT Governance Center.

   For instruction on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

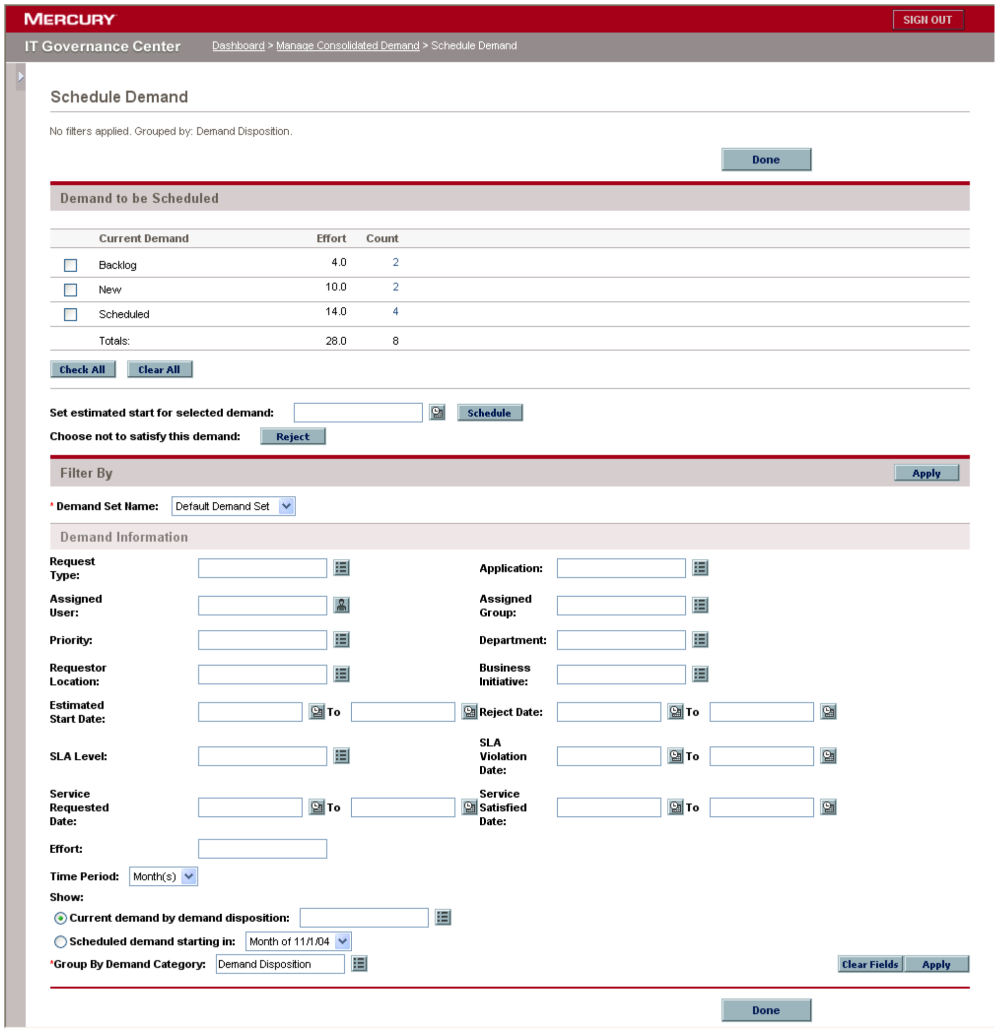
   The standard interface opens.

2. From the menu bar, select **Demand > Schedule Demand.**

   The Schedule Demand page appears.

3. In Demand Set Name, select the demand set to analyze and click **Apply.**

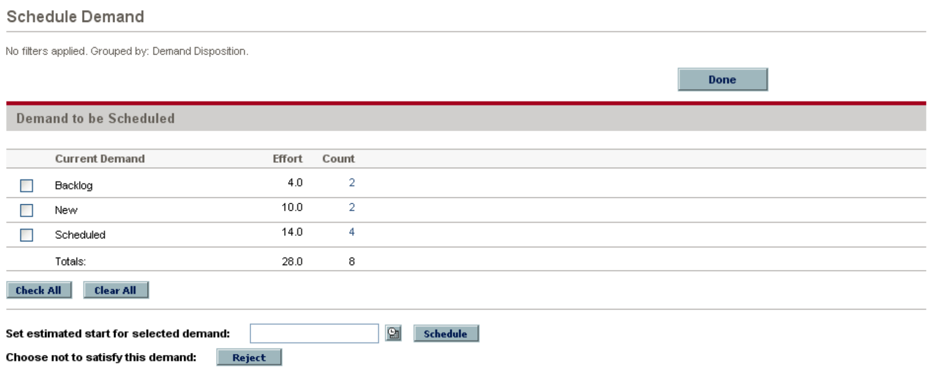
   The demand set data is loaded into the Schedule Demand page.



4. In the Filter By section, complete the remaining fields as needed and click **Apply.**

5. Find the IT demand to schedule or reject.

   In the Demand to be Scheduled section, the IT demand that can be scheduled or rejected are listed by demand disposition.



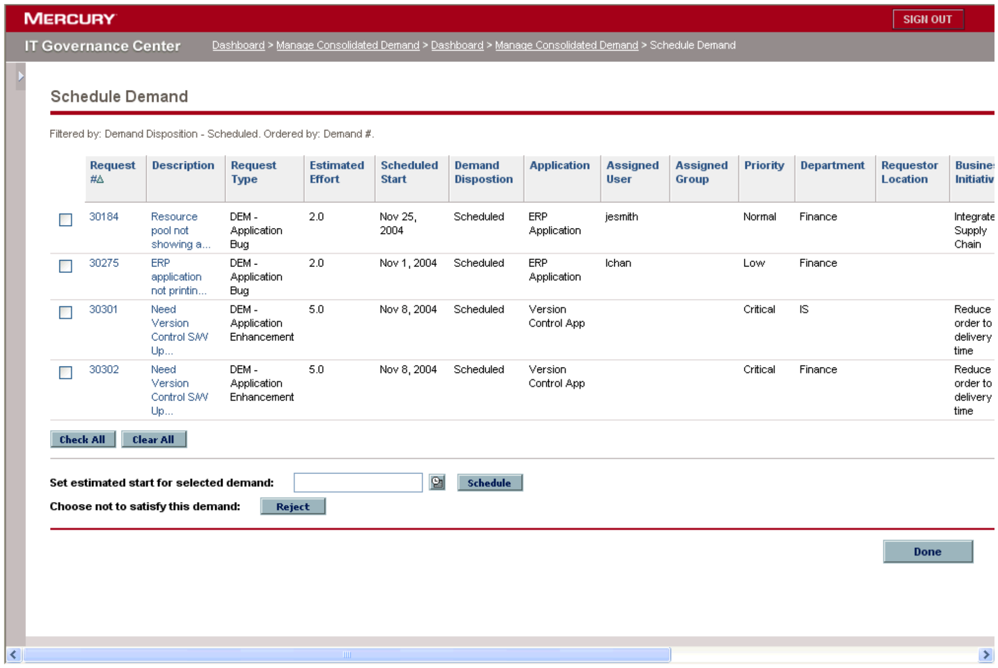
6. Select the IT demand to be scheduled or rejected.

- To select all unscheduled IT demand, in the Demand to be Scheduled section, click **Check All.**
- To select all IT demand of a specific demand disposition, in the Demand to be Scheduled section, click the checkbox next to the demand disposition.
- To select an individual IT demand:

a. Click the number in the Count column.

All of the IT demand with that demand disposition are listed in the Schedule Demand page.

b. In the Schedule Demand page, click the checkbox next to the IT demand.



7. Schedule or reject the selected IT demand.

- To reject an IT demand, click **Reject.** The selected IT demand is rejected.
- To schedule an IT demand:

a. In Set estimated start for selected demand, click the **Date Time Chooser** icon.

The Date Time Chooser window opens.

b. In the Date Time Chooser window, select the date.

The selected date is entered in Set estimated start for selected demand.

c. Click **Schedule.**

The selected date becomes the IT demand's scheduled start date.

Appendix A
IT Demand Portlets

Demand Management includes a number of IT demand portlets. These portlets can be found on the Mercury-supplied Demand Manager and Team Manager pre-configured Dashboard pages. These IT demand portlets can also be added to existing Dashboard pages. *Table A-1* lists the Mercury IT Demand Management solution portlets.

Table A-1. IT demand requests portlets

Portlet	Description
Assignment Queue	Provides a personalized view into the IT demand including the assigned Resource to each IT demand. IT demand without an assigned Resource are displayed with a empty Assign field. You can then use this portlet to assign or re-assign a user as a resource to the IT demand request.
Consolidated Demand	Provides a graphical overview of the IT demand placed on an 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.

Table A-1. IT demand requests portlets [continued]

Portlet	Description
Demand by Category	Provides a quick, graphical view of the IT demand summary organized by a specified category, such as Department or IT demand Type or Priority. You can also select whether the portlet displays the grouped information based on number of IT demand entries within a specific grouping or the consolidated effort of the grouped IT demand.
Demand List	Provides a personalized list of the IT demand placed on an organization or individual. The portlet can be personalized to display IT demand filtered based on specified criteria (IT demand Type, Priority, Demand Disposition, and so forth, as well as the demand set). You can also specify how the IT demand is grouped and which columns should be included in the portlet's display.
SLA Exception Roll Up	Lists the open IT demand requests that have triggered SLA exceptions. The SLAs are configured using request type rules. The portlet displays the active SLAs related to your IT demand, highlighting the violations in red. Click the **View These Exceptions** button to see a list of the violating IT demand requests. The SLA information can be grouped according to your personalized needs, such as Department, Application, and IT demand Type.

Appendix B
Reports by Category

In This Appendix:

- *Overview of Report Categories*
- *Administrative Reports*
- *Change Management Reports*
- *Demand Management Reports*
- *Financial Management Reports*
- *Portfolio Management Reports*
- *Program Management Reports*
- *Project Management Reports*
- *Resource Management Reports*
- *Time Management Reports*

Overview of Report Categories

Reports available through the Mercury IT Governance Center standard interface are listed (by category) and described in the following sections.

Note

Another type of report in Mercury IT Governance Center (not discussed in this document) are server reports, which are submitted and viewed from the Workbench interface, For information about server reports, see the *System Administration Guide and Reference*.

Administrative Reports

The administrative reports (listed in *Table B-1*) are available to users with an administration license.

Table B-1. Administrative reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. This report is also in the Resource category.
Environment Comparison	Helps audit environment definitions when different environments (for example, development and production) are similar to each other.
Environment Detail	Lists the detailed definitions of a given environment or group of environments, the major attributes of the environments, and the attributes of applications tied to the environments.
Environment Group Detail	Contains detailed information about specified environment groups.
Import Requests	Imports requests into Demand Management request tables, moves the requests to the appropriate status, and reports on the results of the execution. For more information about this report, see the *Open Interface Guide and Reference*.

Table B-1. Administrative reports [continued]

Report	Definition
Import Users	Imports data from the user interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Lookup Types	Provides information about one or more lookups.
Notification History	Provides information about notifications that have been sent or are pending.
Object Type Detail	Lists all parameters and commands associated with a given object type.
Portlet Detail	Provides information about a portlet or range of portlets.
RCS Check In	Template of a report used to check files into the RCS repository (if the RCS file management system is being used).
RCS Check Out	Template of a report used to check files out of the RCS repository (if the RCS file management system is being used).
Report Type Detail	Provides information about report type definitions.
Request Header Type Detail	Lists detailed definitional information for request header types.
Request Type Detail	Lists detailed definitional information for request types.
Run Field Security Denormalization	Runs field level security-related denormalization tasks for particular entities.
Run ITG Organization Unit Interface	Imports data from the organization unit interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Run ITG Package Interface	Validates and loads package data from the package open interface tables into the standard Mercury Change Management™ data model. For more information about this report, see the *Open Interface Guide and Reference*.
Run Workflow Transaction Interface	Validates and runs workflow transactions based on data in the workflow open interface tables. For more information about this report, see the *Open Interface Guide and Reference*.
Security Group Detail	Lists definitional information for one or more security groups.

Table B-1. Administrative reports [continued]

Report	Definition
Special Command Detail	Provides details for a command (special command) or a range of commands.
Synchronize Meta Layer	Assesses or synchronizes the RML (Reporting Meta Layer).
User Data Detail	Displays the definition of custom user data field (for example, fields on entities like packages, requests, workflows, and security groups).
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is also in the Resource category.
Validations	Provides information about the various custom validations that have been entered into the system as well as those that are standard with Mercury IT Governance Center products.
Workflow Detail	Provides detailed definitional information about specific workflows or sets of workflows.
Workflow Statistics	Given a date range and a workflow (or a range of workflows), this report provides statistical information regarding workflow usage.

For More Information

Unless otherwise indicated in *Table B-1*, see the *Reports Guide and Reference* for more information about Administrative reports.

Change Management Reports

The Change Management reports (listed in *Table B-2*) are available to users with a Mercury Change Management application license.

Table B-2. Change Management reports

Report	Definition
Compare Custom Database Setup	Runs custom database comparisons.
Compare Filesystem Environment	Compares the files and file structures of two machines.
Compare MS SQL Server 7 Environments	Compares the data model of two SQL Server Version 7 databases.
Compare Oracle Environments	Compares the data model of two Oracle schemas.
Distribution Detail	Lists the contents and results of a distribution.
Environment Comparison by Objects Migrated	Given two environments, this report looks at the history of all the objects migrated into each environment (using Mercury Change Management) and lists any differences.
Environments/Objects Detail	Lists objects that have been migrated into a given environment or set of environments.
Object History	Provides a workflow step transaction history for packages.
Objects/Environments Detail	Lists objects that have been migrated into a given environment or a set of environments.
Package Details	Returns details about a given package.
Package History	Lists the complete workflow history of a given package.
Package Impact Analysis	Lists three separate sections for analysis: • Other packages that contain common objects with a given package • Objects that have migrated alongside one or more of the objects being migrated on the given package but are not included in the given package • Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed
Packages Pending	Lists: • Open packages with pending activity • Details about each package • Pending work for a group of users

Table B-2. Change Management reports [continued]

Report	Definition
Release Detail	Lists requests, packages and distributions associated with a release.
Release Notes	Shows all of the requests and packages in a release as well as their associations.

For More Information

For more information about Change Management reports, see the *Reports Guide and Reference*.

Demand Management Reports

The Demand Management reports (listed in *Table B-3*) are available to users with a Mercury Demand Management application license.

Table B-3. Demand Management reports

Report	Definition
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
DEM Demand Creation History	Shows the history of demand creation for a specified demand set.
DEM Historical SLA Violation	Shown the history of SLA violations for a specified demand set.
DEM Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using a number of selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered by values in custom fields.
Request History	Lists the complete workflow and field change history for each selected request.
Request Quick View	Lists a quick summary of open and closed requests, breaking down the requests by 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 by values in custom fields.
Resource Load by Priority	Lists all open requests assigned to different users. This report is also in the Resource category.

For More Information

For more information about Demand Management reports, see the *Reports Guide and Reference*.

Financial Management Reports

The Financial Management reports (listed in *Table B-4*) are available to users with a Mercury Time Management™ application license.

Table B-4. Financial Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping. This report is also in the Time Management category.
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. This report is also in the Project Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Project Management category.

For More Information

For more information about Financial Management reports, see the *Reports Guide and Referenc*e.

Portfolio Management Reports

The Portfolio Management reports are available to users with a Mercury Portfolio Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Program Management Reports

The Program Management reports are available to users with a Mercury Program Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Project Management Reports

The Project Management reports (listed in *Table B-5*) are available to users with a Mercury Project Management™ application license.

Table B-5. Project Management reports

Report	Definition
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. Totals include both labor and non-labor costs. This report is also in the Financial Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Financial Management category.
Project Critical Path	Displays the tasks that are on a project's critical path.
Project Custom Detail	Generated in HTML table format, showing only the columns that are selected from the header fields and custom fields based on the selected project.
Project Detail	Queries projects by their header fields.
Project Detail (Filter by Custom Fields)	Queries projects by their header fields. You can filter the query using the project's custom fields.
Project Exception Detail	Lists task details for tasks that have violated user-defined exception rules.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. This report is also in the Resource category.
Project Schedule Change	Compares a project plan with a baseline, or a baseline to another baseline.
Project Status Detail	Summarizes project statuses of selected projects and tasks.
Project Summary	Displays all projects that meet the criteria selected in the header fields.
Project Task Assignment	Shows assignment information for a user or a group of users. This report is also in the Resource category.
Project Template Detail	Lists the parameters and parameter details for project templates.

For More Information

For more information about Project Management reports, see the *Reports Guide and Reference*.

Resource Management Reports

The Resource Management reports (listed in *Table B-6*) are available to users with the licenses indicated in the definition column in the table.

Table B-6. Resource Management reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. Available to users with an administration license. This report is also in the Administrative category.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. Available to users with a Mercury Project Management license.
Project Task Assignment	Shows assignment information for a user or a group of users. Available to users with a Mercury Project Management license.
Resource Load by Priority	Lists open requests assigned to different users. Available to users with a Mercury Demand Management license.
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is available to users with any application license. This report is also in the Administration category.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. Available to users with a Mercury Time Management application license. This report is also in the Time Management category.

For More Information

For more information about Resource Management reports, see the *Reports Guide and Reference*.

Time Management Reports

The Time Management reports (listed in *Table B-7*) are available to users with a Mercury Time Management application license.

Table B-7. Time Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping.
Actual Time Summary	Summarizes actual time information entered in non-cancelled time sheets.
Time Sheet Details	Summarizes multiple time sheets displays their details.
Time Sheet Summary	Summarizes time information entered in non-cancelled time sheets.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. This report is also in the Resource category.

For More Information

For more information about Time Management reports, see the *Reports Guide and Reference*.

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