



Mercury IT Governance Center™
**Configuring IT Demand
Tracking and Management**

Version: 6.0

MERCURY™



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Chapter 1 Introduction

In This Chapter:

- *About This Document*
 - *Who Should Read This Document*
 - *Prerequisite Documents*
 - *Related Documents*
 - *Overview of IT Demand Management*
 - *Accessing Mercury IT Governance Center*
-

About This Document

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.

Use Mercury IT Governance Center to:

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

To capture and manage IT demand, you must configure Mercury Demand Management for IT demand tracking and management. Configuring Mercury Demand Management for IT demand requires configuring request types and workflows to track and manage IT demand. In addition, you need to configure SLAs and demand sets to meet your IT demand requirements.

This document divides the configuration tasks into the following chapters:

- [Chapter 1, *Introduction*, on page 9](#)

This chapter provides an overview of IT demand tracking and management configuration, and lists the chapters found in this document.

- [Chapter 2, *Configuring IT Demand Request Types*, on page 17](#)

Requests are a fundamental work unit of a request tracking and resolution system. All requests are defined by request types. This chapter details how to configure standard request types into IT demand request types.

- [Chapter 3, *Configuring Demand Sets*, on page 31](#)

Demand sets are used to map IT demand fields to one or more IT demand request type fields. This chapter details how to create a demand set and map the demand set fields to IT demand request type fields.

- [Chapter 4, *Configuring Workflows for IT Demand*, on page 43](#)

Workflows define standard business processes. Your organization's response to IT demand can be configured to follow a certain process to bring the IT demand to resolution. This chapter provides the information required to update workflows for managing IT demand.

- [Chapter 5, *Configuring SLAs for IT Demand*, on page 47](#)

Mercury Demand Management tracks and reports on a predefined set of Service Level Agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time for items being managed using Demand Management. This chapter discusses how to configure SLA for use with Mercury Demand Management solution.

Who Should Read This Document

This document is for the following audience types:

- Application administrators
- Application developers and configurators

For More Information

For information about audience types, see the *Guide to Documentation*.

Prerequisite Documents

Prerequisite documents for this document are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*

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:

- *Guide to Tracking and Managing IT Demand*
- *Demand Management User's Guide*
- *Commands, Tokens, and Validations Guide and Reference*
- *Demand Management: Configuring a Request Resolution System*
- *Open Interface Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*

For More Information

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

Overview of IT Demand Management

The Mercury Demand Management solution for managing IT demand enables you to capture, analyze, and manage the demand placed on your IT organization. The Mercury Demand Management solution for managing IT demand can be used to track and manage different types of demand. These demand types can range from bug fix requests to requests for new initiatives.

To configure Demand Management for tracking and managing IT demand:

- Step One: Create the IT demand request type.

This includes configuring request types and their associated request header types to include the Demand Management Field Groups. This also includes configuring the SLAs in the request types. See [Overview of Creating IT Demand Request Types on page 20](#) for details.

- Step Two: Configure the demand set.

This includes configuring the demand fields and mapping them to fields on each demand request type. See [Configuring Demand Sets on page 31](#) for details.

- Step Three: Configure the workflow for IT demand tracking and management.

This includes using special transitions in your workflows that enable IT demand scheduling features. See [Configuring Workflows for IT Demand on page 43](#) for details.



Note

This document details how to configure a Mercury Demand Management solution for managing IT demand. For details on how to track and manage your IT demand, see the [Guide to Tracking and Managing IT Demand](#).

Accessing Mercury IT Governance Center

Businesses often need to control access to certain information and business processes. This can be done to protect sensitive information, such as employee salaries, or to simplify business processes by hiding data that is irrelevant to the user. Mercury IT Governance Center includes a set of features to help control data and process security on the following levels:

- Limiting who can access certain windows or pages
- Limiting who can view or edit certain fields
- Limiting the data displayed in sensitive fields or screens
- Limiting which users can view, create, edit or process Mercury IT Governance Center entities, such as requests, packages, projects, portfolios, and programs
- Limiting which users can view, create or edit Mercury IT Governance Center configuration entities, such as workflows, request types, object types, and security groups
- Limiting which users can alter the security settings

The following features control the data and process security in Mercury IT Governance Center. These features can be combined in a number of ways to provide a secure system:

- **Licenses.** Each user is assigned a license that provides the user with the potential to access to a set of Mercury IT Governance Center product-related screens and functions. Licenses dictate available behavior but need to be used in conjunction with access grants to enable specific fields and functions.
- **Access Grants.** Linked to users through security groups, access grants define which windows and functions users can view, edit, or perform actions in. Access grants also provide varying levels of control over certain entities and fields.
- **Entity-level restrictions.** Settings on the entity that specify who can create, edit, process, and delete Mercury IT Governance Center entities, such as requests, packages, and projects. You can also control which request types and object types can be used with certain workflows. These restrictions are often configured in the configuration entities, such as workflows, request types, and object types.

- **Field-level restrictions.** For each custom field that you define in Mercury IT Governance Center, you can configure when it is visible or editable. For some fields, you can additionally specify which users can view or edit the field.
- **Configuration-level restrictions.** You can specify, using ownership groups settings, which users can modify configuration entities in the system. For example, you can control who is allowed to edit an existing workflow. This allows you to guarantee that only appropriate users are altering your Mercury IT Governance Center-controlled processes.

For More Information

For information concerning security groups and access grants, see the *Security Model Guide and Reference*.

Configuring IT Demand Request Types

In This Chapter:

- *IT Demand Request Types Overview*
 - *Default IT Demand Request Types*
 - *Overview of Request Type Field Attributes*
 - *Overview of Creating IT Demand Request Types*
 - *Adding IT Demand to Request Header Types*
 - *Adding Request Header Types to Request Types*
 - *IT Demand SLA Fields*
 - *IT Demand Schedule Fields*
 - *Configuring Effort for IT Demand*
 - *Configuring Effort for IT Demand Request Types*
-

IT Demand Request Types Overview

Requests are a fundamental work unit of a request tracking and resolution system. End-users create requests and then submit requests along a resolution process, which is defined in the workflow. The request page contains all information typically required to complete a specific business process. The Mercury Demand Management solution for managing and tracking IT demand requires two specific categories (and their associated fields) be included on an IT demand request type (see *Figure 2-1*):

- Demand Management SLA Fields
- Demand Management Scheduling Fields

The screenshot shows the Mercury IT Governance Center interface for creating a new IT demand request. The page title is "Create New DEM - Application Bug". The form is divided into several sections:

- Header:** Includes "Expand All" and "Collapse All" buttons, and "Submit" and "Cancel" buttons.
- Summary:** Displays "Requested By: Jane Smith" and "Request Status: Unreleased".
- Workflow:** Set to "DEM - Bug Request Workflow".
- Assigned To:** A text input field.
- Assigned Group:** A dropdown menu.
- Requestor Department:** A dropdown menu.
- Priority:** A dropdown menu.
- Application:** A text input field.
- Description:** A large text area.
- Details:** A list of expandable sections: Problem/Resolution, Environment, Analysis, Project Information, Demand Management SLA Fields, Demand Management Scheduling Fields, Notes, and References.
- Demand Management SLA Fields:** Contains fields for "SLA Level", "SLA Violation Date", "Service Requested Date", and "Service Satisfied Date".
- Demand Management Scheduling Fields:** Contains fields for "Estimated Start Date", "Estimated Effort" (with a value of 2), "Reject Date", and "Demand Satisfied Date".

At the bottom of the form, there are "Submit" and "Cancel" buttons. The copyright notice "Copyright © 2004 Mercury" is visible at the bottom left.

Figure 2-1. IT demand request

Adding the IT demand fields to a request requires making changes to the associated request type. If you do not want to change an existing request type, you can also create a new request type that includes the IT demand fields as part of the new request type.

For More Information

For more information regarding configuration of request types, see the *Demand Management: Configuring a Request Resolution System* document.

Default IT Demand Request Types

[Table 2-1 on page 19](#) provides a list of the Mercury-supplied IT demand request types.

Table 2-1. IT demand request types

Request Type	Description
DEM - Application Bug	Report an existing application bug and request its correction. By default, SLAs are not selected and scheduling fields are selected.
DEM - Application Enhancement	Request an enhancement to an existing application. By default, SLAs are not selected and scheduling fields are selected.
DEM - Database Refresh	Request a database refresh. By default, SLAs are selected and scheduling fields are selected.
DEM - Initiative	Request something new, such as a new project or a new program. By default, SLAs are not selected and scheduling fields are selected.

Overview of Request Type Field Attributes

When creating request type fields, there are three general attributes associated with each field.

- **Criteria for Visible Fields.** Fields can be set to be visible or hidden to the user based on their settings. For example, the SLA Level field might be hidden when a request is first created.
- **Criteria for Editable Fields.** Fields can be set to become display-only, so that their contents are frozen and become non-editable, based on their settings. For example, the SLA Level field might be non-editable when a request is first created and editable when the request is accepted.
- **Criteria for Default Fields.** Fields can be configured to update the value in that field automatically based on the settings. For example, the SLA Violation Date can be automatically updated based on the SLA Level and the Service Requested Date.

For More Information

For more information regarding configuration of request types, see the *Demand Management: Configuring a Request Resolution System* document.

Overview of Creating IT Demand Request Types

To create an IT demand request type:

1. Add the IT demand fields to a request header type.

See [Adding IT Demand to Request Header Types](#).

2. Add the IT demand request header type to a request type.

See [Adding Request Header Types to Request Types](#) on page 24.

3. Configure the SLA fields.

See [IT Demand SLA Fields](#) on page 26.

Adding IT Demand to Request Header Types

To add the IT demand fields to a request header type:

1. Open the Mercury IT Governance Workbench.

For more information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Demand Mgmt > Request Header Types**.

The Request Header Type Workbench window opens.

3. Open an existing request header type or create a new request header type.

The Request Header Type window opens.

The screenshot shows the 'Request Header Type' configuration window for 'DEM - Application Enhancement'. The window includes fields for 'Request Header Type Name', 'Description', and 'Extension'. Below these is a table with columns for 'Prompt', 'Display', 'Display Only', 'Transaction Hist.', 'Notes Hist.', and 'On Search/Filter Pages'. The table lists various fields with their corresponding display and history settings. At the bottom, there are buttons for 'All', 'New', 'Edit', 'Remove', 'Field Groups', 'OK', 'Save', and 'Cancel'.

Prompt	Display	Display Only	Transaction Hist.	Notes Hist.	On Search/Filter Pages
Summary					
Request No.	YY		N	N	N
Requested By	YY		N	N	Y
Request Type	YN		N	N	Y
Created On	YY		N	N	Y
Sub-Type	NN		N	N	Y
Request Status	YY		N	N	Y
Workflow	YY		N	N	Y
Assigned To	YN		N	N	Y
Contact Name	NN		N	N	Y
Assigned Group	YN		N	N	Y
Contact Phone	NY		N	N	Y
Requestor Department	YN		N	N	Y
Contact Email	NY		N	N	Y
Company	NN		N	N	Y
Priority	YN		N	N	Y
Application	YN		N	N	Y
Description	YN		N	N	N

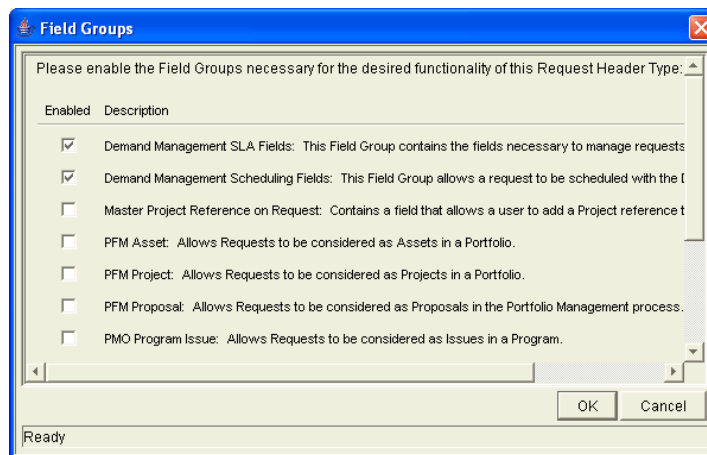
4. Make sure the request header type general information is complete.

See the following table for the general information fields and definitions for request header types.

Field	Description
Request Header Type Name	The name of the request header type.
Description	A useful description of how the request type is used.
Extension	For release types created for a Mercury Change Management™ extension. Select the extension from the drop-down list.
Enabled	Indicates whether or not the request type is available to Mercury IT Governance Center.

5. On the Request Header Type window, click **Field Groups**.

The Field Groups window opens.



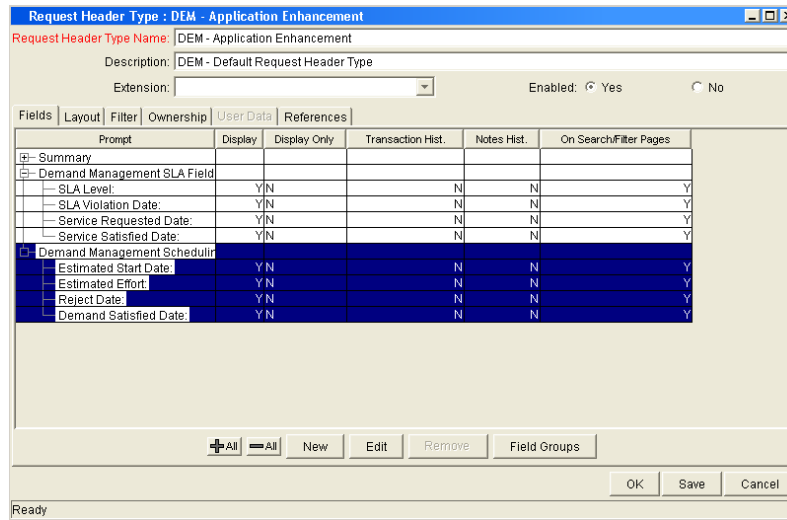
6. In the Field Groups window, select the IT demand fields.

The following lists the IT demand fields:

- Demand Management SLA Fields
- Demand Management Scheduling Fields

7. On the Field Groups window, click **OK**.

The selected IT demand fields appear on the request header type. Select the **Fields** tab to see the IT demand fields. Expand the category heading to see the associated fields.



8. Complete the request header type as required.

9. In the general information section of the request header type, in the Enable field, select **Yes**.

The request header type is enabled.

10. Save the changes to the request header type.

Click **OK** to save the changes and close the Request Header Type window. Click **Save** to save the changes and leave the Request Header Type window open. Click **Cancel** to lose the changes and close the Request Header Type window.

For More Information

For more information regarding configuration of request types, see the *Demand Management: Configuring a Request Resolution System* document.

Adding Request Header Types to Request Types

To add a request header type to a request type:

1. Open the Workbench.

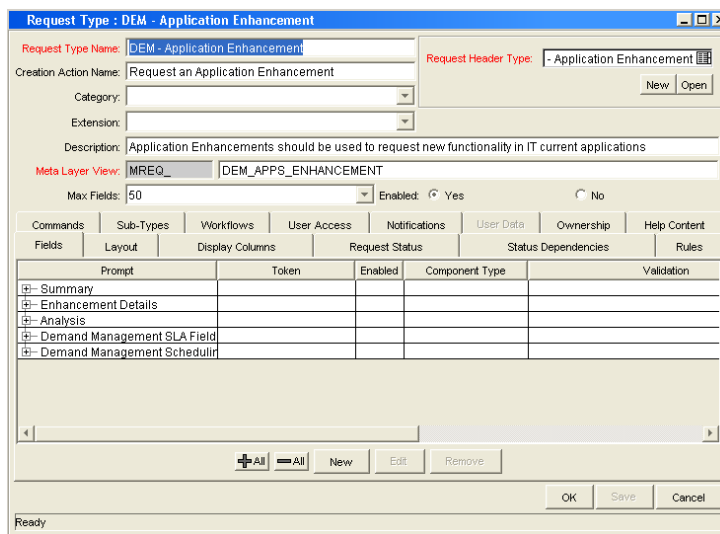
For more information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Demand Mgmt > Request Types**.

The Request Type Workbench window opens.

3. Open an existing request type or create a new request type.

The Request Type window opens.



4. Make sure the request type general information is complete.

See the following table for the general information fields and definitions for request types.

Field	Description
Request Type Name	The name of the request type.
Creation Action Name	A description of the request type's function. For example Log a Product Bug . Creation Action Names display on the Create New Request page.
Category	The category containing the request type. Categories are created by an application administrator and are based on the business needs of the organization. Examples of categories which an organization might use are Sales and Support and General Administration . Categories display on the Create New Request window in the standard interface. [Validation = CRT - Request Type Category]
Extension	For release types created for a Mercury Change Management extension. Select the extension from the drop-down list.
Description	A useful description of how the request type is used.
Meta Layer View	Meta layer views relate information specific to the Mercury IT Governance Center. For example, the reporting meta layer view MREQ_OPENED_CLOSED_BY_TYPE_D provides summary information for request submission and completion activity, broken down by request type and by calendar day.
Max Fields	The maximum number of fields the request type can have.
Enabled	Indicates whether or not the request type is available to Mercury IT Governance Center.
Request Header Type	Selects a request header type to be used with this request type. Select an existing request header type from the auto-complete list, or create a new request header type by clicking New .

- In the general information section of the request type, in the Request Header Type field, select the IT demand request header type from the auto-complete list.

All enabled request header types are displayed in the auto-complete list. If you cannot find your IT demand request header type, return to the Request Header Type window and make sure the request header type is enabled.

- Complete the request type as required.

7. In the general information section of the request type, in the Enable field, select **Yes**.

The request type is enabled.

8. Save the changes to the request type.

Click **OK** to save the changes and close the Request Type window. Click **Save** to save the changes and leave the Request Type window open. Click **Cancel** to lose the changes and close the Request Type window.

For More Information

For more information regarding configuration of request types, see the *Demand Management: Configuring a Request Resolution System* document.

IT Demand SLA Fields

IT demand can be tracked and reported on using a predefined set of Service Level Agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time as specified by your business processes.

The Service Requested Date value is set when the request is initiated. The user then sets the SLA Level in the request and the SLA Violation Date is calculated. If the request is not closed before the SLA Violation Date, an SLA exception is triggered.

The screenshot shows a software interface with a tree view on the left containing 'Details', 'Enhancement Details', 'Analysis', and 'Demand Management SLA Fields'. The 'Demand Management SLA Fields' section is expanded, showing four input fields: 'SLA Level' with a dropdown menu set to 'Critical - 3 Days', 'SLA Violation Date' with a date picker set to 'November 5, 2004', 'Service Requested Date' with a date picker set to 'November 1, 2004', and 'Service Satisfied Date' with an empty date picker. Below this section is another collapsed section labeled 'Demand Management Scheduling Fields'.

Figure 2-2. IT demand SLA fields

The Service Requested Date does not have to correlate to the request's creation date. For example, the customer's SLA might be based on the time it takes to implement a bug fix following bug approval (rather than the bug creation).

[Table 2-2](#) lists the IT demand SLA fields.

Table 2-2. IT demand SLA fields

Request Type	Description
SLA Level	The SLA Level field is set by a rule based on the priority of the request. The default values for the DEM - SLA Level Validation are: <ul style="list-style-type: none"> • Critical - 3 Days • High - 5 Days • Normal - 15 Days • Low - 30 Days
SLA Violation Date	The SLA Violation Date is set by a rule based on the Service Level and Service Requested Date values. The SLA Violation Date equals the Service Requested Date value plus the time dictated by the Service Level Validation.
Service Requested	The Service Requested Date is set by a rule to the creation date of the request. The Service Requested Date could be set to correlate with any workflow step.
Service Satisfied	The Service Satisfied Date is set by the execution workflow step, DEM - SLA Satisfied On.

IT Demand Schedule Fields

Once IT demand is created, an IT manager or IT work scheduler must decide when to start work on the IT demand, the estimated effort required, when the IT demand is satisfied, and if the IT demand should be rejected.

Estimated Start Date:

Estimated Effort:

Reject Date:

Demand Satisfied Date:

Figure 2-3. IT demand schedule fields

Table 2-3 lists the IT demand scheduling fields.

Table 2-3. IT demand scheduling fields

Request Type	Description
Estimated Start Date	The anticipated date when the task to complete the IT demand will start. The Estimated Start Date is entered by the IT manager or responsible IT work scheduler.
Estimated Effort	The Estimated Effort is set by a rule. This rule can be changed for your specific request type. The following lists the default effort associated with the IT demand request type: <ul style="list-style-type: none"> • DEM - Application Bug = 2 • DEM - Application Enhancement = 5 • DEM - Initiative = 5 • DEM - Database Refresh = 1
Reject Date	The date the request was rejected. The Reject Date is entered by the IT manager or responsible IT work scheduler.
Demand Satisfied Date	The date the IT demand was completed. The Demand Satisfied Date is entered by the IT manager or responsible IT work scheduler.

Configuring Effort for IT Demand

IT demand allows you to analyze demand based on one of the following:

- The number (total count) of IT demand requests
- The accumulation of effort associated with each IT demand request

Consider the case where you have ten requests for database refreshes and ten requests for bug fixes. If a database refresh takes one hour to fulfill and a bug fix takes two days to fulfill, it might be more meaningful for the organization to factor in the effort involved in fulfilling demand. If you want effort to equal the total count of IT demand requests, set the estimated effort of each IT demand request type to one.

Each IT demand request type has a default effort value assigned to it (see [IT Demand Schedule Fields on page 27](#)). This effort value can be reconfirmed or changed during an analysis phase at a later step in the process (on the request). The following are a few examples of how you can set the default effort for a request type:

- Single default using field defaults
- Advanced defaults driven by other request type fields using rules
- Using status dependencies in an analysis phase in the request process with reconfirm

Configuring Effort for IT Demand Request Types

To configure effort for IT demand:

1. Open the Workbench.

For more information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Demand Mgmt > Request Types**.

The Request Type Workbench window opens.

3. Open an existing IT demand request type or create a new IT demand request type.

The Request Type window opens.

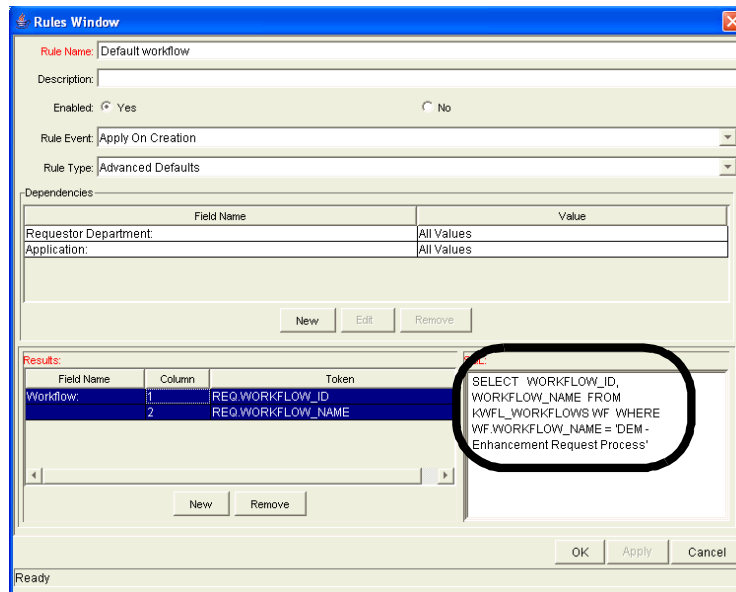
4. In the Request Type window, select the **Rules** tab.

The **Rules** tab opens.

5. In the **Rules** tab, select Default for Estimated Effort and click **Edit**.

The Rules window opens. The Default for Estimated Effort is displayed.

6. In the Rules window, in the SQL text area, change the default number to the new default number.



7. In the Rules window, click **OK**.

The Rules window closes. The **Rules** tab is displayed.

8. At the bottom of the **Rules** tab, click **OK**.

The changes to the request type are saved.

Chapter

3

Configuring Demand Sets

In This Chapter:

- *Overview of Demand Sets*
 - *Creating Demand Sets*
 - *Creating Demand Set Fields*
 - *Mapping Demand Set Fields to IT Demand Request Type Fields*
 - *Copying Demand Sets*
 - *Deleting Demand Sets*
 - *Deleting IT Demand Request Types from Demand Sets*
 - *Deleting Demand Set Fields from Demand Sets*
-

Overview of Demand Sets

Field naming conventions across different IT demand request types might not be the same. However, you might find it useful to manage and report across the different IT demand types in a consistent way. Demand sets help the system know how to report across the different IT demands.

Each demand set can include a unique group of demand fields and demand request types. Each demand set can then have a unique mapping of IT demand fields to IT demand request type fields (see [Figure 3-1](#)).

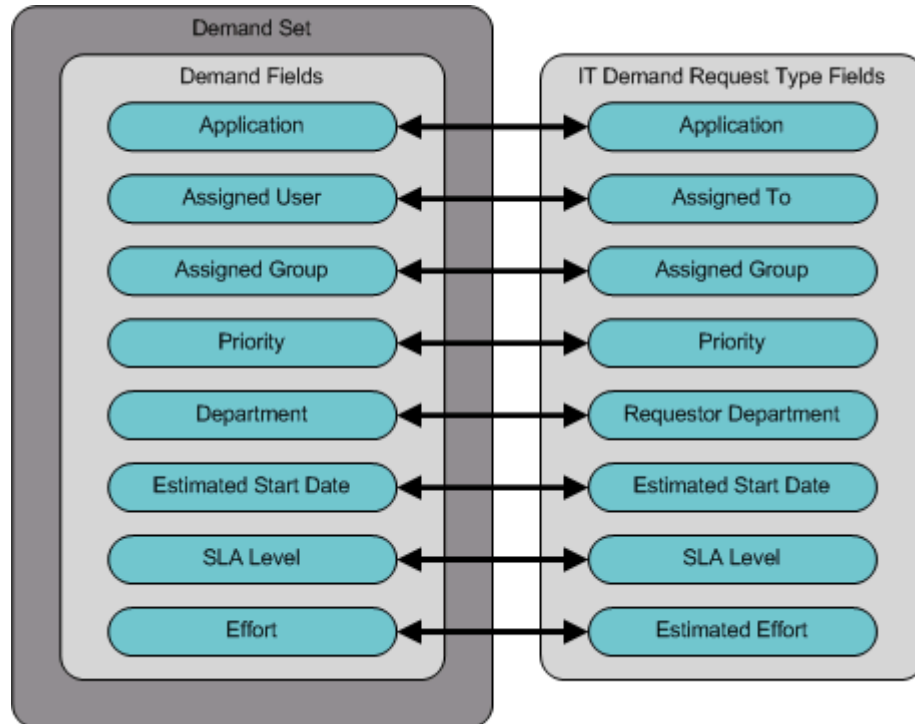


Figure 3-1. Demand set field and IT demand request type field mapping

You can create and configure demand sets in the standard interface using the Demand menu. If you do not see the Demand menu, contact your application administrator.

To configure a demand set:

1. Create the demand set.
2. Create the fields for the demand set.
3. Add an IT demand request type to the demand set and map the fields.

Creating Demand Sets

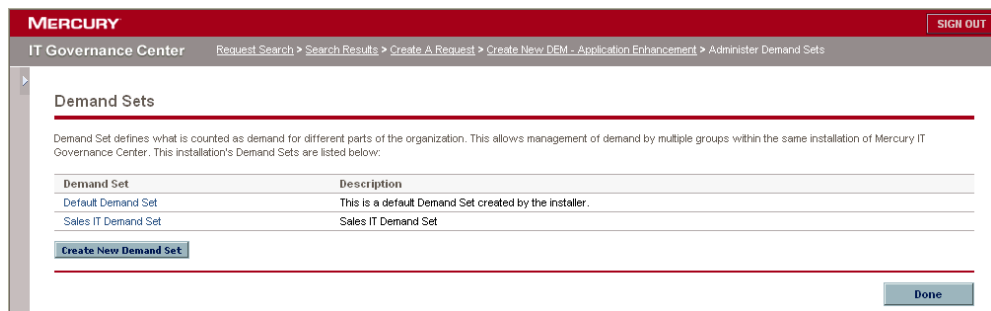
To create a demand set:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

2. From the menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.



3. On the Demand Sets page, click **Create New Demand Set**.

The Demand Set - New Demand Set page opens.

Field Name	Search Validation

4. On the Demand Set - New Demand Set page, complete the fields as listed in the following table.

Field	Name
Name	Enter the name of the new demand set.
Description	Enter a brief description explaining the function of this demand set.
Enabled	Make the demand set available to the system. Select Yes to make the demand set available to the system. The Demand Set must have at least one field and one request type selected.

5. At the bottom of the Demand Set - New Demand Set page, click **Done**.

The demand set is created.

Creating Demand Set Fields

You must create the fields associated with a demand set. Once created, these demand set fields will be mapped to IT demand request type fields. These fields should be common fields that you use for managing and reporting on the various types of demand. Each demand set field must exist in each of the IT demand request types.

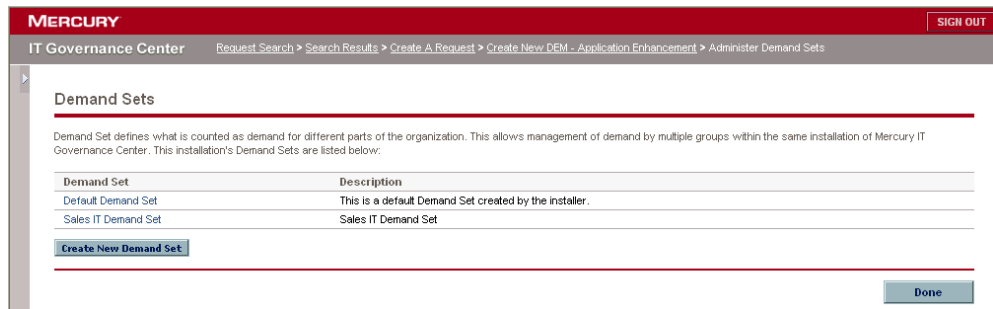
To create a demand set field:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

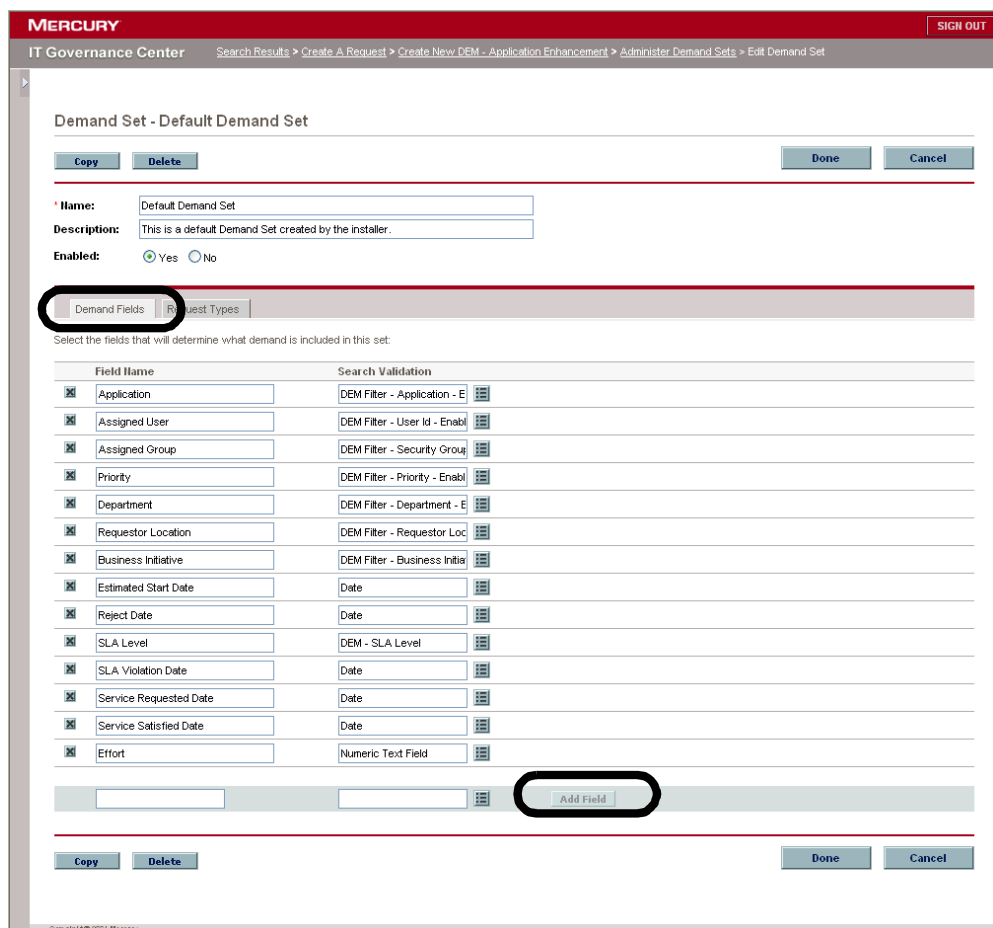
2. From the menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.



3. On the Demand Sets page, select a demand set.

Click on a demand set to open the Demand Set page. The selected demand set is displayed in the Demand Set page. The **Demand Fields** tab is displayed.

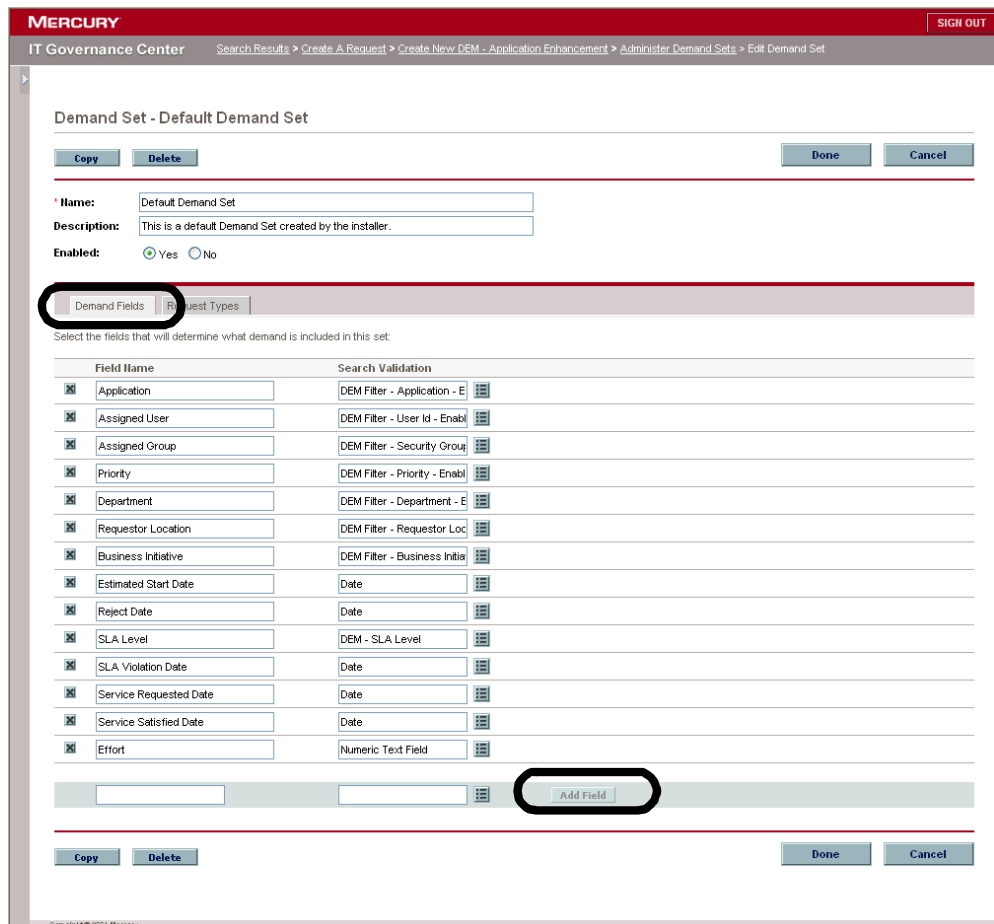


4. Create a demand set field:

- a. On the Demand Set page, in the Field Name column, enter a field name.
- b. On the Demand Set page, in the Search Validation column, select the validation from the single-select auto-complete list. The search validation is used to offer the full set of available values. For example, if one demand type was only available to users in the United States and another was available to users in Europe. Each IT demand request type would use its own field but the search field would include all possible choices.
- c. On the Demand Set page, click **Add Field**.

The configured field is saved to the demand set. A **Delete** icon appears next to the configured field. A new empty field is created.

5. Repeat [step 4 on page 36](#) as many times as required.



6. At the bottom of the Demand Set page, click **Done**.

The fields are added to the demand set.

Mapping Demand Set Fields to IT Demand Request Type Fields

To map demand set fields to IT demand request type fields:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

2. From the menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.

3. On the Demand Sets page, select a demand set.

Click on a demand set to open the Demand Set page. The selected demand set is displayed in the Demand Set page. The **Demand Fields** tab is displayed.

4. On the Demand Set page, select the **Request Types** tab.

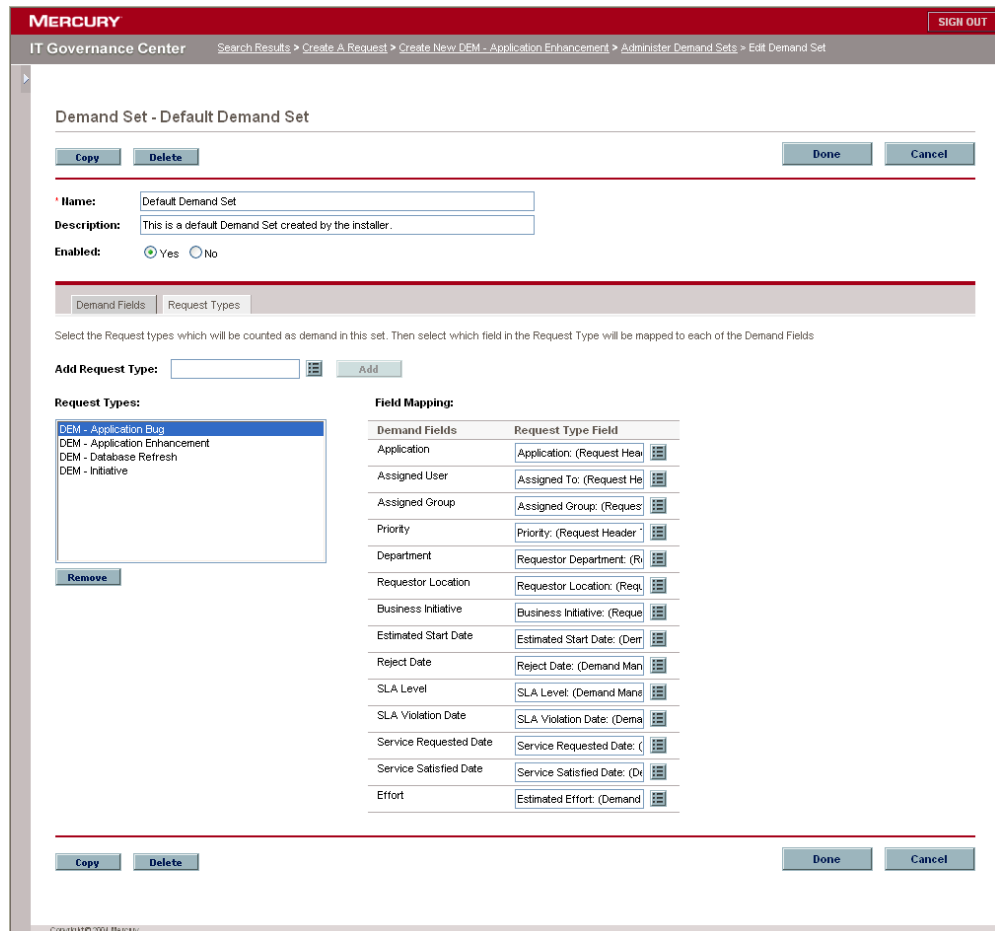
The Request Types tab opens.

5. In the Add Request Type field, select an IT demand request type from the single-select auto-complete list.

The selected IT demand request type is displayed in the Add Request Type field.

6. Next to the Add Request Type field, click Add.

The IT demand request type is added to the demand set. The IT demand request type is displayed in the Request Types field. You must map all of the demand set fields to the IT demand request type fields before adding another IT demand request type to the demand set.



7. In the Field Mapping section, map the demand set fields (Demand Fields column) to the IT demand request type fields (Request Type Field column).

Select the IT demand request type field using the single-select auto-complete list. The Demand Fields should be mapped to Request Type Fields with the same validation type. Additionally, the information stored in the fields should be similar across the multiple IT demand request types. This allows you to obtain an accurate picture of demand across multiple demand types.

8. Repeat the process as many times as necessary until all of the IT demand request types are added to the demand set and all of the IT demand request type fields are mapped to demand set fields.

9. Repeat [step 5 on page 37](#) through [step 7 on page 38](#) as often as you want.

10. At the bottom of the Demand Set page, click **Done**.

The changes to the demand set are saved. The IT demand request types and field mappings are added to the demand set.

Copying Demand Sets

To copy a demand set:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

2. From the menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.

3. On the Demand Sets page, select a demand set.

Click on a demand set to open the Demand Set page. The selected demand set is displayed in the Demand Set page.

4. On the Demand Set page, click **Copy**.

A copy of the demand set is created.

5. In the Name field, enter a new name for the copied demand set.

6. At the bottom of the Demand Set page, click **Done**.

The new demand set is saved.

Deleting Demand Sets

To delete a demand set:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

2. From the menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.

3. On the Demand Sets page, select a demand set.

Click on a demand set to open the Demand Set page. The selected demand set is displayed in the Demand Set page.

4. On the Demand Set page, click **Delete**.

A delete confirmation window opens.

5. In the delete confirmation window, select **Yes**.

The demand set is deleted.

6. At the bottom of the Demand Set page, click **Done**.

The Demand Set page closes.

Deleting IT Demand Request Types from Demand Sets

To delete an IT demand request type from a demand set:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

2. From the Mercury IT Governance Dashboard™ menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.

3. On the Demand Sets page, select a demand set.

Click on a demand set to open the Demand Set page. The selected demand set is displayed in the Demand Set page. The **Demand Fields** tab is displayed.

4. On the Demand Set page, select the **Request Types** tab.

The **Request Types** tab opens.

5. In the **Request Types** tab, in the Request Types field, select an IT demand request type.

6. In the **Request Types** tab, click **Remove**.

The IT demand request type is deleted.

7. At the bottom of the Demand Set page, click **Done**.

The Demand Set page closes.

Deleting Demand Set Fields from Demand Sets

To delete a demand set field from a demand set:

1. Log on to Mercury IT Governance Center.

The standard interface appears.

2. From the Dashboard menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.

3. On the Demand Sets page, select a demand set.

Click on a demand set to open the Demand Set page. The selected demand set is displayed in the Demand Set page. The **Demand Fields** tab is displayed.

4. On the Demand Set page, click a **Delete** icon next to the demand set field.

Each demand set field includes a **Delete** icon. The demand set field is removed.

5. At the bottom of the Demand Set page, click **Done**.

The Demand Set page closes.

Chapter

4

Configuring Workflows for IT Demand

In This Chapter:

- *Overview of IT Demand and Workflows*
 - *Transitions for Workflows*
 - *Event Errors*
-

Overview of IT Demand and Workflows

The **Schedule**, **Reject**, and **Assign** functions in Demand Management interact directly with workflows. When a request is **Scheduled**, **Rejected**, or **Assigned** the current workflow step is selected for a transition. If the workflow step is configured with a scheduling-related transition, the request follows the transition out of the step. If the current workflow step does not have this transition defined, no processing happens, but the IT demand is still marked as **Scheduled**, **Rejected**, or **Assigned** (see *Figure 4-1* and *Figure 4-2*).

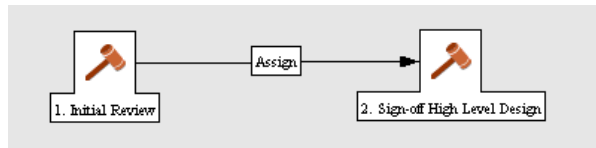


Figure 4-1. Workflow step without IT demand transitions

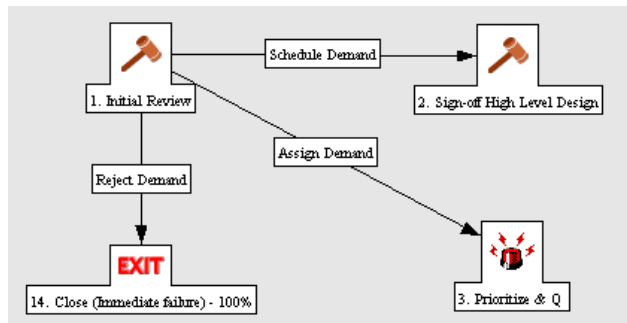


Figure 4-2. Workflow step with IT demand transitions

Transitions for Workflows

Mercury Demand Management for IT demand includes an additional method for transitioning out of a workflow decision step that coincides with an IT demand scheduling event. When adding a transition from one workflow decision step to another workflow step, select **Specific Event** in the Define Transition window (see [Figure 4-3](#)). You can then specify the specific event for the transition.

The following is a list of the Mercury Demand Management for IT demand transitions:

- Assign Demand
- Schedule Demand
- Reject Demand

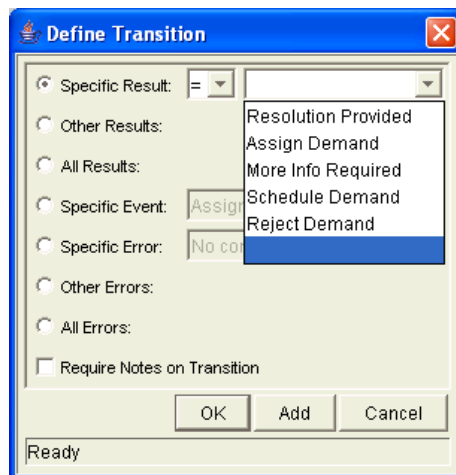


Figure 4-3. Specific event transition from a workflow step

For More Information

For more information regarding configuration of request types, see the *Demand Management: Configuring a Request Resolution System* document.

Event Errors

Mercury Demand Management for IT demand events do not occur if one of the following conditions exist:

- If there is required look-ahead for the transition. The exception to this exception is when the look-ahead requires you to enter an Assigned To user during the assignment of IT demand.
- If you do not have the correct security permissions (IT demand request type and workflow step) to transition out of the workflow step.
- If the IT demand request type is locked (being edited) by another user.

If the scheduling, assignment, or rejecting event does not work, an error message is returned.

Chapter

5

Configuring SLAs for IT Demand

In This Chapter:

- *Overview of Setting up SLAs for IT Demand*
 - *SLA Behavior*
 - *Configuring SLA Rules*
 - *Configuring SLA Levels*
 - *Configuring SLA Violation Dates*
 - *Configuring Service Request Dates*
 - *Configuring Service Satisfied Dates*
-

Overview of Setting up SLAs for IT Demand

The Mercury Demand Management IT demand solution tracks and reports on a predefined set of Service Level Agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time for items being managed using Demand Management.

Once the IT demand types, demand sets and workflows are configured, the Service Level Agreements (SLAs) can be configured. SLAs are configured using request type rules and validations. SLAs can be enabled for all IT demand types.



In the default Mercury Demand Management for IT demand solution installation, SLAs are only enabled for the Database Refresh demand type.

SLA Behavior

SLA behavior is driven by the Demand Management SLA fields on the request type. The following is a list of the SLA fields (see [Figure 5-1](#)):

- SLA Level
- SLA Violation Date
- Service Requested Date
- Service Satisfied Date

A screenshot of a web-based configuration interface for Demand Management SLA Fields. The interface has a sidebar on the left with a tree view containing: Details, Enhancement Details, Analysis, and Demand Management SLA Fields (which is selected). The main content area shows four fields: 'SLA Level' with a dropdown menu set to 'Critical - 3 Days'; 'SLA Violation Date' with a date picker set to 'November 5, 2004'; 'Service Requested Date' with a date picker set to 'November 1, 2004'; and 'Service Satisfied Date' with an empty date picker. Below these fields is another section header 'Demand Management Scheduling Fields'.

Figure 5-1. Demand Management SLA Fields

The Service Requested Date value is set when the request is logged. You set the SLA Level in the request. When you select SLA Level, the Request SLA Violation Date is calculated. If the request is not satisfied before the SLA Violation Date, an SLA exception is triggered.



Note

The service requested date does not have to correlate to the request creation date. For example, the customer’s SLA might be based on the time it takes to implement a bug fix following bug approval (rather than the bug creation).
The service satisfied date denotes the end of the request resolution process. Mercury Demand Management for IT demand can be set to satisfied at any point in the process.

Configuring SLA Rules

The SLA behavior is based on the request type rules and workflow configurations. *Figure 5-2* provides an example of the SLA fields on a request type.

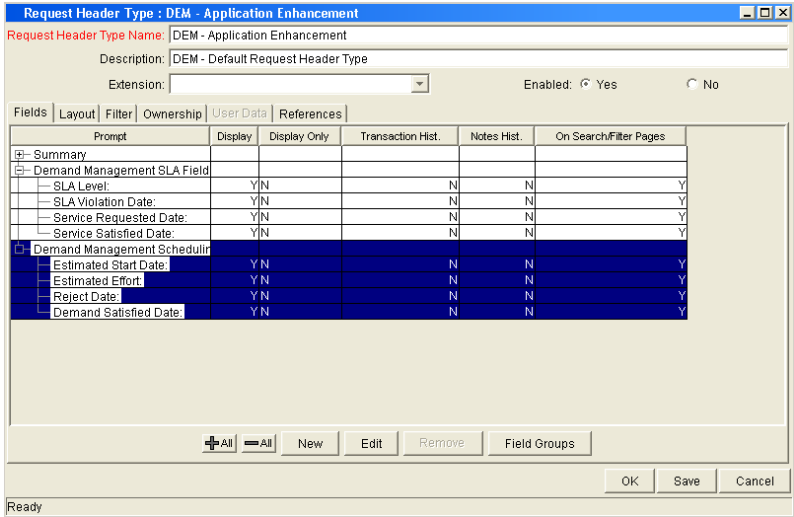


Figure 5-2. Dem - Database Refresh Request Type



Note

You should use a validation to store the SLA configuration information. It will be easier for you to alter the validation, rather than having to modify the SQL. You should use one validation per request type with an SLA.

Configuring SLA Levels

The SLA level field is set by a rule based on the priority of the request. The validation for the SLA level field is DEM - SLA Level. *Figure 5-3* shows the rules window and validation for SLA level. The default values for the DEM - SLA Level validation are:

- Critical - 3 Days
- High - 5 Days
- Normal - 15 Days
- Low - 30 Days

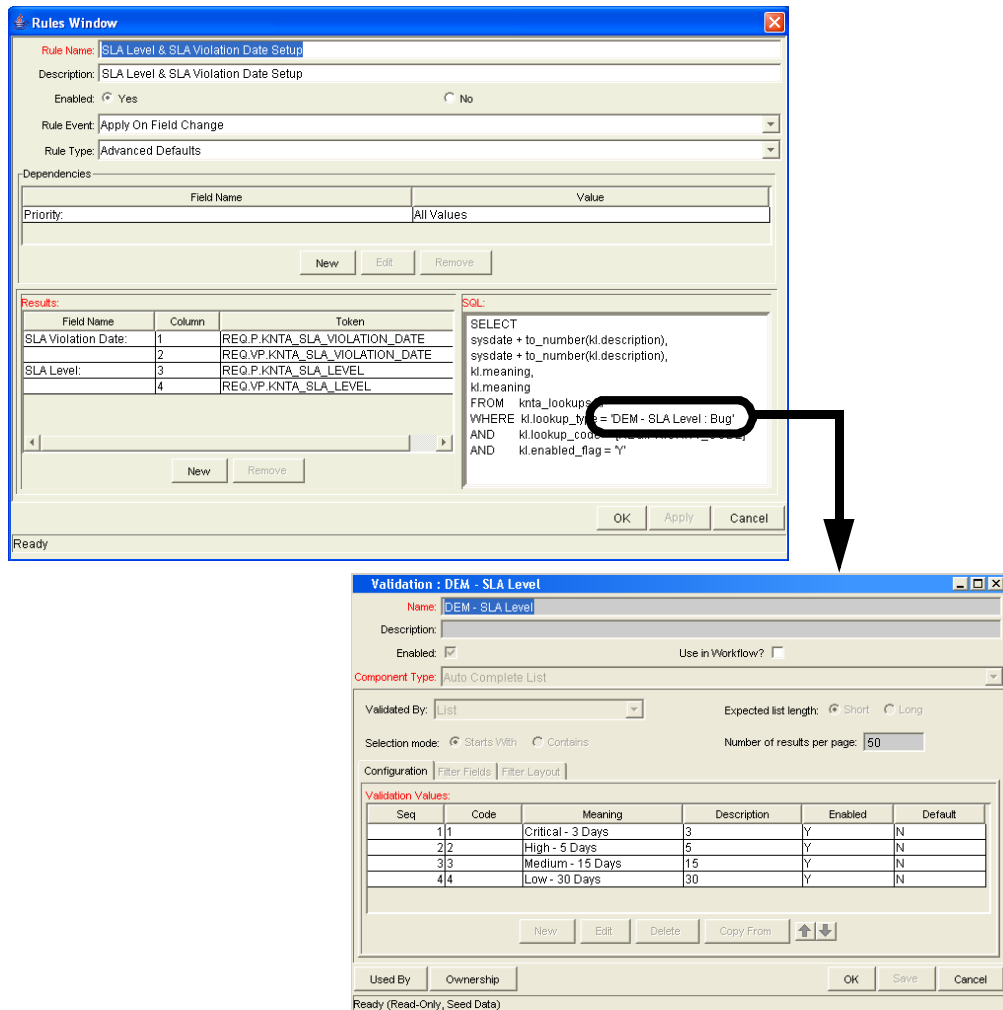


Figure 5-3. SLA Level Rule and Validation

Configuring SLA Violation Dates

The SLA violation date is set by a rule based on the service level and service requested date. The SLA violation date equals the service requested date value plus the time dictated by the service level validation. *Figure 5-4* shows the rules window for SLA violation date.

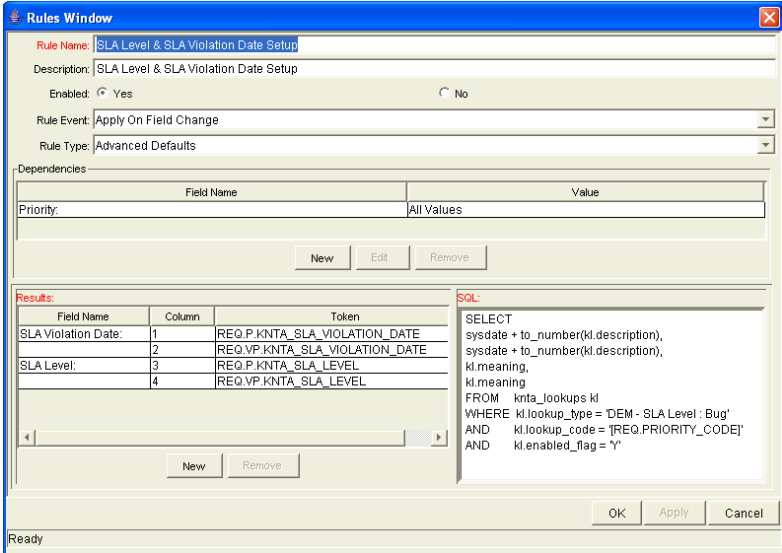


Figure 5-4. SLA Violation Date Rule

Configuring Service Request Dates

The service requested date is set by a rule to the creation date of the request. The service requested date could be set to correlate with any workflow step. *Figure 5-5* shows the rules window for service requested date.

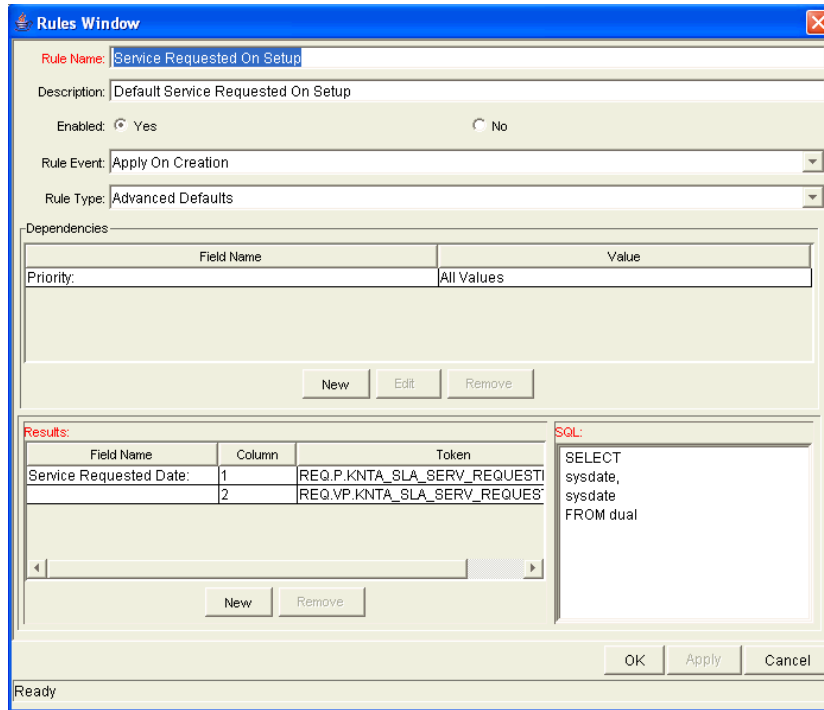


Figure 5-5. Service Request Date Rule

Configuring Service Satisfied Dates

The service satisfied date is set by the execution workflow step, DEM - SLA Satisfied On. *Figure 5-6* shows the DEM - SLA Satisfied On execution step in the Database Refresh workflow.

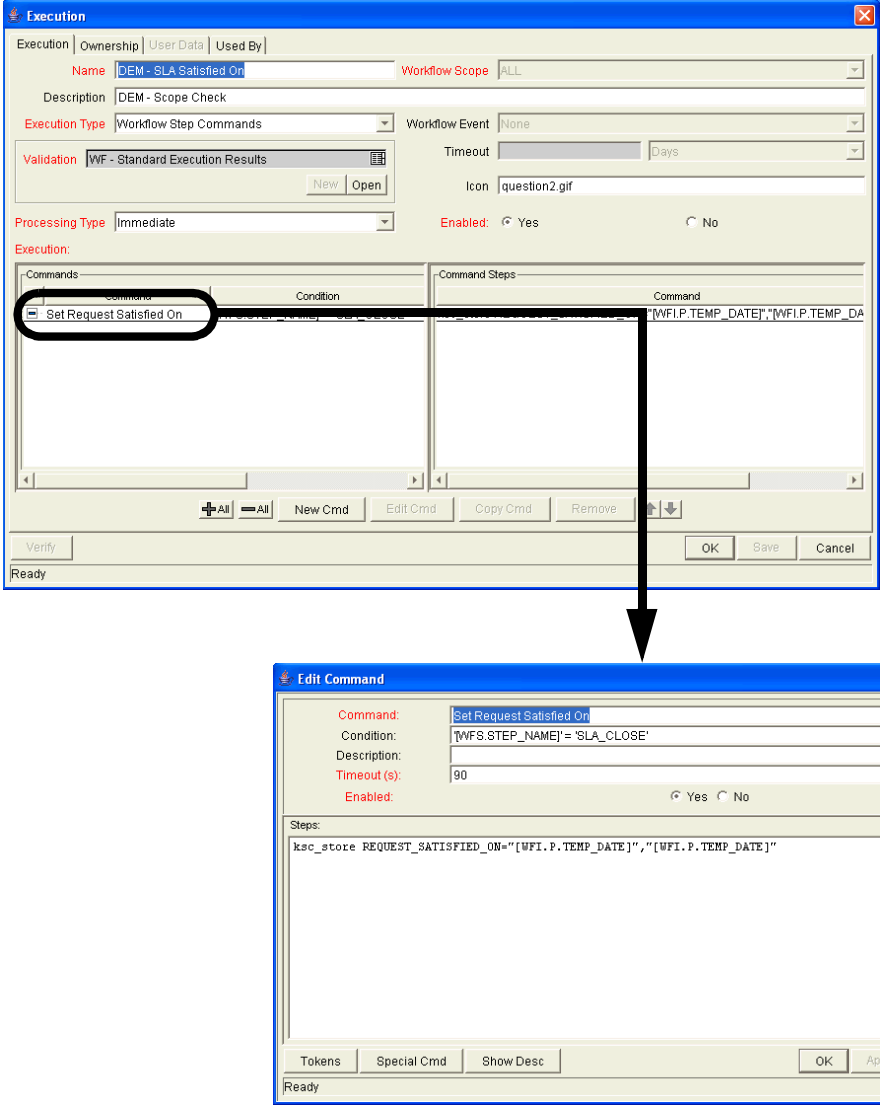


Figure 5-6. Database Refresh Workflow Execution

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