

# HP Project and Portfolio Management Center

Software Version: 7.1

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## Tracking and Managing IT Demand User's Guide

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- Document release date, which changes each time the document is updated
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# 1 Getting Started with Managing and Tracking IT Demand

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## In This Chapter:

- *Introduction to Tracking and Managing IT Demand*
  - *Overview of Tracking and Managing IT Demand*
    - *Demand Management Terms and Concepts*
  - *Related Information*
-

# Introduction to Tracking and Managing IT Demand

HP Demand Management is an HP Project and Portfolio Management Center (PPM Center) product that provides a single application and repository to capture all demand placed on an IT organization. PPM 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.

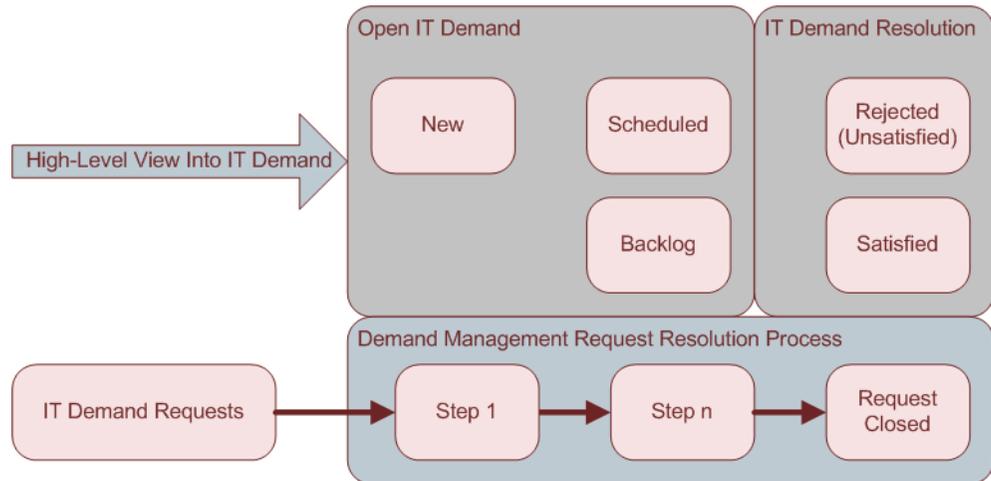
## Overview of Tracking and Managing IT Demand

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, notes, emails, and voice mailboxes. When requests for help come from a variety of sources, managing those requests can become a challenge. Often, the result is that IT resources are pulled in many different directions and are overworked, which results in IT activities becoming misaligned with the needs of the business.

HP Demand Management provides a single point of contact for all requests placed on an IT group. HP 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 HP IT Demand Management solution uses the existing HP Demand Management functionality (see *Figure 1-1*). HP Demand Management provides standard IT demand categories that allow IT groups to normalize the various requests for help. HP Demand Management also provides the tools required to track, analyze, schedule, and resolve requests. These tools include menus, pages, PPM Dashboard pages, and portlets (see *Chapter 2, Interface Options for Managing Demand, on page 17.*) Demand on an IT group can be analyzed, managed, assigned to users, scheduled, and rejected (see *Chapter 3, Processing IT Demand, on page 35.*)

Figure 1-1. IT Demand Management process



## Demand Management Terms and Concepts

The following sections define terms and concepts associated with HP Demand Management so that you can fully understand the HP IT Demand Management solution.

### Demand Disposition

Demand disposition, representing the current state of an IT demand, is one of the following:

- New
- Scheduled
- Backlog

### Demand Fields and Demand Sets

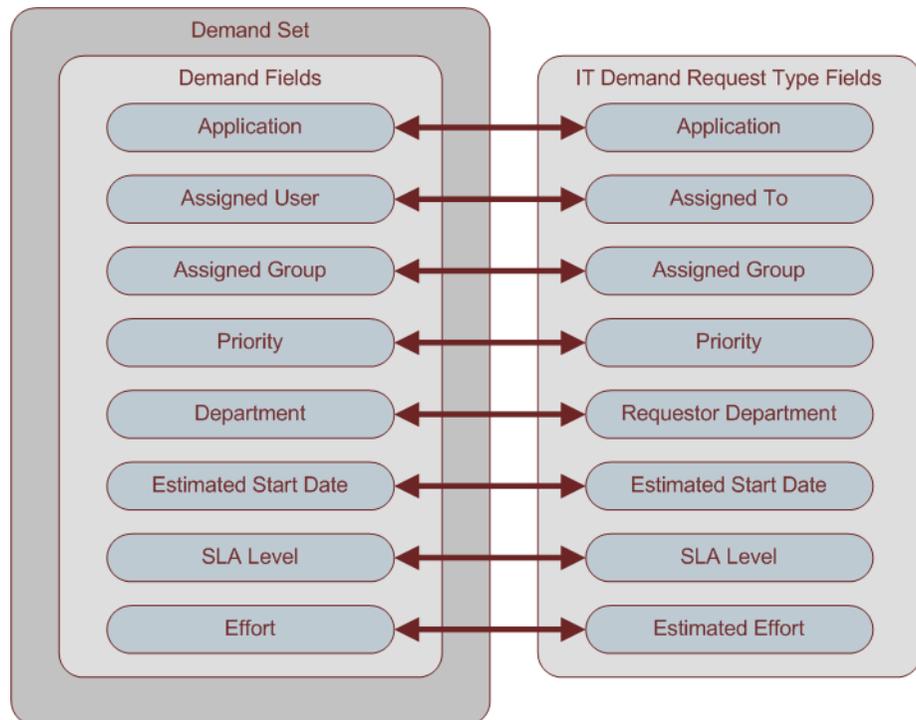
Different groups within your company might need to track different sets of IT demand. For example, your R&D department might need to track the IT demand from product bug and enhancement requests. The IS department might need to track IT demand from help desk requests. To enable this separation of IT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

Demand sets are self-contained configurations for the HP 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 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 HP IT Demand Management solution is designed to be integrated with existing HP Demand Management request resolution systems. The HP 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 HP IT Demand Management solution has an HP-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 HP 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 HP-supplied IT demand request type corresponds to an HP-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 workflows.

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 HP 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 HP Demand Management.

## HP IT Demand Management Solution Requests

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

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

Additionally, the management of HP IT Demand Management solution requests is identical to that of HP 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 *HP Demand Management User's Guide*.

## Related Information

The following documents also include information related to tracking and managing IT Demand:

- *Configuring IT Demand Tracking and Management*
- *HP Demand Management User's Guide*
- *HP Demand Management Configuration Guide*

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## 2 Interface Options for Managing Demand

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### In This Chapter:

- *Menus for Managing IT Demand*
  - *Understanding IT Demand Management Pages*
    - *Overview of the Manage Consolidated Demand Page*
    - *Overview of the Schedule Demand Page*
    - *Overview of the Analyze Demand by Category Page*
  - *Preconfigured Dashboard Pages for Managing IT Demand*
    - *Overview of the Preconfigured Demand Manager Dashboard Page*
    - *Overview of the Preconfigured Team Manager Dashboard Page*
  - *Portlets for Managing IT Demand*
    - *Understanding the Consolidated Demand Portlet*
    - *Understanding the Demand List and Request List Portlets*
    - *Understanding the Demand by Category Portlet*
    - *Understanding the Team Assignment Queue Portlet*
    - *Understanding the SLA Exception Roll Up Portlet*
-

## Menus for Managing IT Demand

The HP 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 menus described in the following section as part of your menu bar, see your application administrator.

In the standard interface menu bar, the HP IT Demand Management solution adds the **Demand Management** menu as well as the **Demand Sets & Processes** submenu of the **Administration** menu. From these menus, you can:

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

*Table 2-1* defines the demand-related components of the **Demand Management** menu and the **Administration > Demand Sets & Processes** menu.

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



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

Table 2-1. Default Demand Management and Administration menus

Menu Group	Menu Item	Description
Demand Management	Search Requests	Searches for requests using filter criteria you specify and controls which fields are displayed (in columns) for the search results. Allows you to save search criteria with a name you specify.
	Manage Consolidated Demand	Analyzes the IT demand placed on your organization. You can also click the graph to schedule or reject a portion of the IT demand. For more information, see <a href="#">Overview of the Manage Consolidated Demand Page on page 20</a> .
	Schedule Demand	Schedules when the IT demand will be fulfilled. You can also select to reject the IT demand. For more information, see <a href="#">Overview of the Schedule Demand Page on page 22</a> .
	Analyze Demand by Category	Analyzes the current IT demand using a set of filters and display parameters. For more information, see <a href="#">Overview of the Analyze Demand by Category Page on page 23</a> .
	Create a Request	Creates a new request. For more information, see the <i>HP Demand Management User's Guide</i> .
Demand Management > Demand Reports	Demand Creation History	Submits the Demand Creation History report.
	Satisfied Demand History	Submits the Satisfied Demand History report.
	Historical SLA Violations	Submits the Historical SLA Violations report.
Demand Management > Saved Searches	Manage Saved Searches	Manages previously saved searches (see menu item Search Requests). Allows you to specify category names and organize saved searches under those categories. Adds to the <b>Saved Searches</b> menu the names of your saved searches, organized under categories as you specified.
Administration > Demand Set & Processes	Manage Demand Sets	Configures demand sets. This includes adding request types to your demand sets and mapping demand fields to IT demand request type fields.
	Manage Bug Fix Process	Opens the DEM - Bug Request workflow in the PPM Workbench.
	Manage Enhancement Process	Opens the DEM - Enhancement Request Process workflow in the PPM Workbench.
	Manage Initiative Process	Opens the DEM - Project Initiative Process workflow in the PPM Workbench.

## Understanding IT Demand Management Pages

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

The HP IT Demand Management solution provides specific demand task-oriented pages to manage your IT demand. You can use the **Demand Management** menu to access these task-oriented pages.

### Overview of the Manage Consolidated Demand Page

The Manage Consolidated Demand page provides a graphical view of the IT demand in terms of effort, as shown in the example in *Figure 2-1*, where demand is grouped by its disposition. You can click a segment of a bar on the bar chart to schedule that IT demand. You can also use this page to graphically analyze your IT demand by selecting the demand set, desired filters, and a time frame, and specifying a grouping.

To open this page, from the menu bar, select **Demand Management > Manage Consolidated Demand**.

You can configure the Manage Consolidated Demand page to display a range of data related to IT demand. You can use the **Filter By** parameters to display a smaller, more focused set of items. You can specify the **Group By Demand Category** field to organize the display of IT demand accordingly, for example by assigned user or by department.

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

Figure 2-1. Example Manage Consolidated Demand page

Manage Consolidated Demand, By Demand Disposition

No filters applied Grouped by Demand Disposition. Clicking on the graph sections will allow you to schedule your filtered demand.



## Overview of the Schedule Demand Page

The Schedule Demand page is used to schedule or reject IT demand. You can access this page by clicking a segment of a bar on the bar chart on the Manage Consolidated Demand page, or by selecting **Demand Management > Schedule Demand** from the menu bar. Enter any desired filter criteria to display a smaller, more focused list. You can also specify the **Group By Demand Category** field, which organizes the list with the appropriate demand category accordingly.

For example, if you click the New segment of the stacked bar for Dec 05 in [Figure 2-1 on page 21](#) (see the legend of colors at the bottom of the bar chart), the Schedule Demand page shown in [Figure 2-2](#) appears and you can schedule that demand.

Figure 2-2. Example Schedule Demand page

Schedule Demand

Filtered by: Demand Disposition - New. Grouped by: Demand Disposition.

---

**Demand to be Scheduled**

Current Demand	Effort	Count
<input type="checkbox"/> New	6.0	3
Totals:	6.0	3

---

Set estimated start for selected demand:

Choose not to satisfy this demand:

---

Filter By

\* Demand Set Name:

---

**Demand Information**

Request Type: <input type="text"/>	Application: <input type="text"/>
Assigned User: <input type="text"/>	Assigned Group: <input type="text"/>
Priority: <input type="text"/>	Department: <input type="text"/>
Requestor Location: <input type="text"/>	Business Initiative: <input type="text"/>
Estimated Start Date: <input type="text"/> To <input type="text"/>	Reject Date: <input type="text"/> To <input type="text"/>
SLA Level: <input type="text"/>	SLA Violation Date: <input type="text"/> To <input type="text"/>
Service Requested Date: <input type="text"/> To <input type="text"/>	Service Satisfied Date: <input type="text"/> To <input type="text"/>
Effort: <input type="text"/>	

Time Period:

Show:

Current demand by demand disposition:

Scheduled demand starting in:

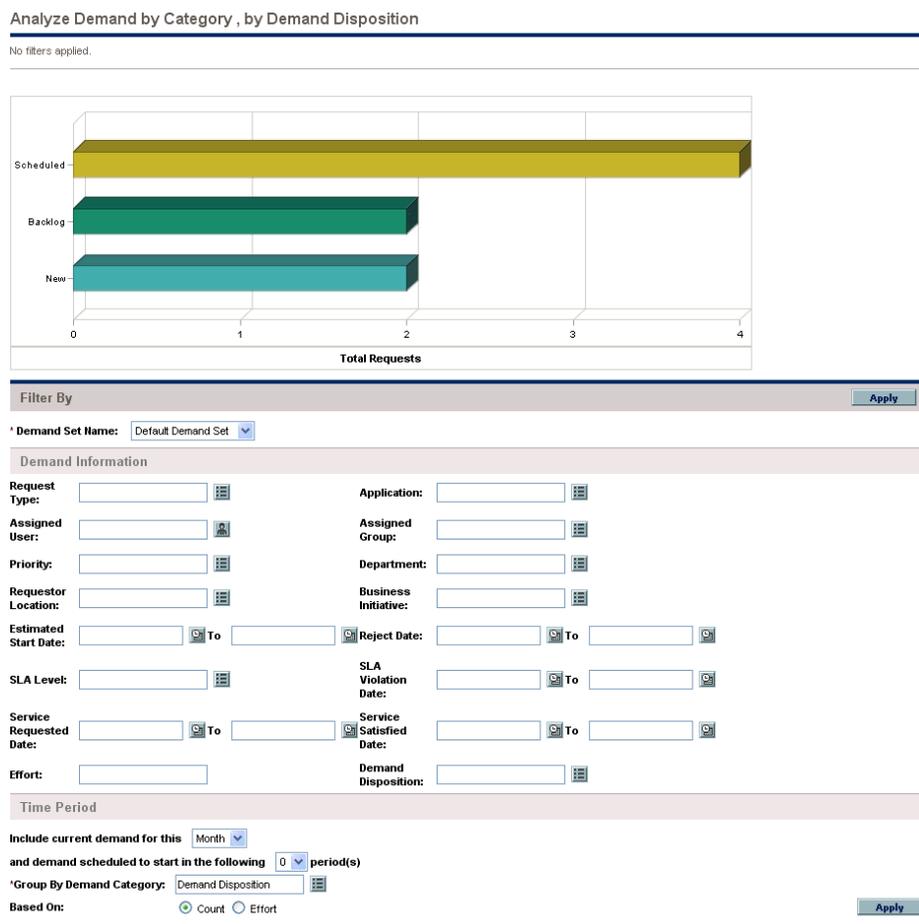
\* Group By Demand Category:

## 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. You can access this page by selecting **Demand Management > Analyze Demand by Category** from the menu bar. You can view the IT demand associated with a different demand set by changing the **Demand Set Name** field. Enter any desired filter criteria to display a smaller, more focused, number of items. You can also specify the **Group By Demand Category** field, which organizes the graphical display with the appropriate demand category accordingly, and then click **Apply**.

*Figure 2-3* shows an example Analyze Demand by Category page with results grouped by demand disposition.

Figure 2-3. Analyze Demand by Category page



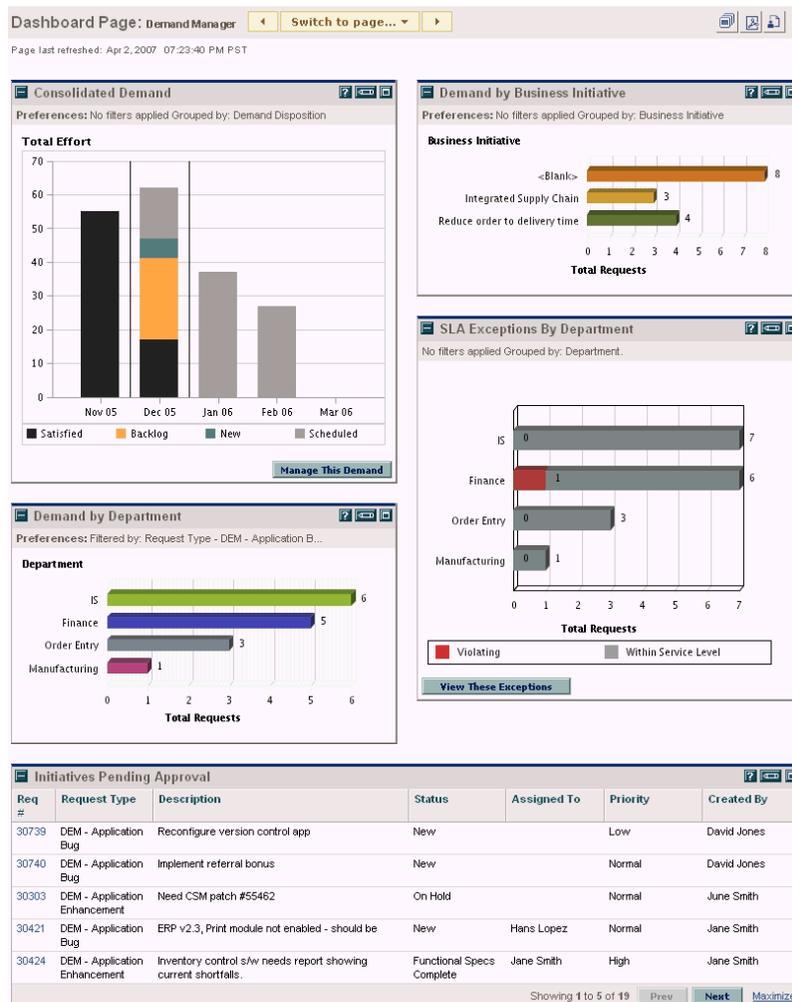
# Preconfigured Dashboard Pages for Managing IT Demand

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

## Overview of the Preconfigured Demand Manager Dashboard Page

The preconfigured Demand Manager Dashboard page provides an overview of the IT demand placed on an entire organization. See *Figure 2-4*.

Figure 2-4. Demand Manager Dashboard page



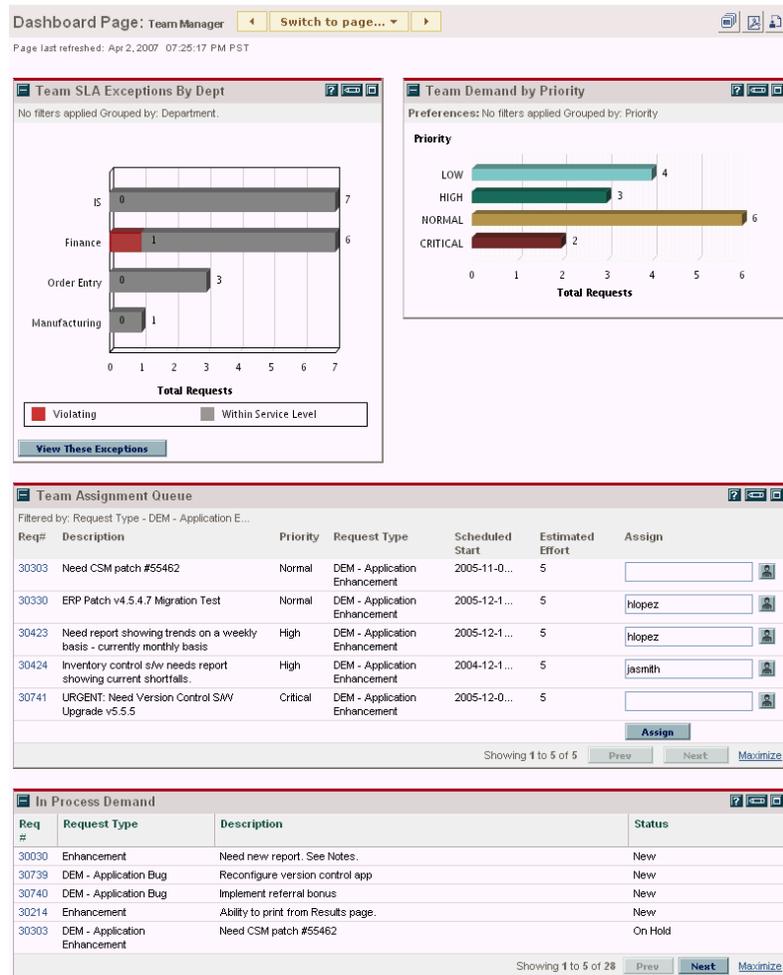
This Dashboard page includes the following portlets to provide an overview of the various IT demand activities in your organization:

- **Consolidated Demand portlet.** The Consolidated Demand portlet provides a graphical overview of the IT demand placed on your organization. For more information, see [Understanding the Consolidated Demand Portlet on page 28](#).
- **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 [Understanding the Demand by Category Portlet on page 30](#).
- **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 [Understanding the Demand by Category Portlet on page 30](#).
- **SLA Exceptions by Department portlet.** The SLA Exceptions by Department portlet is a personalized version of the SLA Exception Roll Up portlet. The SLA Exception Roll Up portlet lists the open IT demand requests that have triggered SLA exceptions. For more information, see [Understanding the SLA Exception Roll Up Portlet on page 32](#).
- **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 descriptions and statuses. For information about the Request List portlet, see [Understanding the Demand List and Request List Portlets on page 28](#) and the *HP Demand Management User's Guide*.

## Overview of the Preconfigured Team Manager Dashboard Page

The preconfigured Team Manager Dashboard page provides a view of the IT demand that would be of interest to those managing IT demand. See *Figure 2-5*.

Figure 2-5. Team Manager Dashboard page



This Dashboard page includes the following portlets to provide an overview of the various IT demand activities in your organization:

- **Team SLA Exceptions by Dept portlet.** The Team SLA Exceptions by Dept portlet is a personalized version of the SLA Exception Roll Up portlet. The SLA Exception Roll Up portlet lists the open requests that have triggered SLA exceptions. For more information, see *Understanding the SLA Exception Roll Up Portlet* on page 32.
- **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 IT demand by priority. For more information, see *Understanding the Demand by Category Portlet* on page 30.
- **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 *Understanding the Team Assignment Queue Portlet* on page 30.
- **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 descriptions and the statuses of the IT demand in the workflow. For information about the Request List portlet, see *Understanding the Demand List and Request List Portlets* on page 28 and the *HP Demand Management User's Guide*.

## Portlets for Managing IT Demand

The HP 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 PPM 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 Demand Portlet

The Consolidated Demand portlet on the preconfigured Demand Manager page displays IT demand disposition data in a bar chart format. See *Figure 2-4 on page 24*. Resting the cursor over a bar in the bar chart opens a tooltip that lists more precise information about the IT demand data.

Click **Manage This Demand** to filter which data is to be included in the resulting graphs and how it is to be organized (grouped). For example, you can group IT demand data by assigned user or by department.

### 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 preconfigured Demand Manager page or the preconfigured Team Manager page. It must be added individually to a PPM Dashboard page.
- **Request List portlet.** The Request List portlet is personalized as:
  - The Initiatives Pending Approval portlet on the preconfigured Demand Manager page (see *Figure 2-4 on page 24*)
  - The In Process Demand portlet on the preconfigured Team Manager page (see *Figure 2-5 on page 26*)

Each of these portlets displays a table with data related to IT demand. Fields in each portlet's preferences allow you to filter which data is to be included in the displayed table and how it is to be organized (grouped). For example, you can group IT demand data by assigned user or by department.

From the portlet results, you can drill down to the demand's request details by clicking the linked request number in the leftmost column of the portlet listings. For example, if you click request number 30303 in the In Process Demand portlet in *Figure 2-5 on page 26*, the request details appear as in *Figure 2-6*.

Figure 2-6. Viewing a request from the In Process Demand portlet

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**DEM - Application Enhancement - #30303**

Description: Need CSM patch #55462 Most Recent Note: (View Notes Below)

Request Status: On Hold (View Full Status Below)

**Available Actions**

**On Hold**

---

Save Successful 06:13:42 PM PST

**Header**

**Summary**

<b>Request No.:</b>	30303	<b>Requested By:</b>	June Smith
<b>Request Type:</b>	DEM - Application Enhancement <input type="button" value="Change"/>	<b>Created On:</b>	November 10, 2004
<b>Workflow:</b>	DEM - Enhancement Request Process	<b>Request Status:</b>	On Hold
<b>Assigned To:</b>			
<b>Assigned Group:</b>			
<b>Requestor Department:</b>	Order Entry		
<b>Priority:</b>	Normal	<b>Application:</b>	CSM App
<b>Description:</b>	Need CSM patch #55462		

**Details**

**Enhancement Details**

<b>Enhancement Name:</b>	CSM patch #55462		
<b>Detailed Description:</b>	Need CSM patch #55462		
<b>New Enhancement:</b>	No	<b>Suite:</b>	
<b>Requested By:</b>	November 10, 2004		
<b>Requestor Location:</b>	<input type="text"/>	<b>Business Initiative:</b>	<input type="text" value="Reduce order to delivery time"/>

**Analysis**

**Estimated Completion Date:**

**Demand Management SLA Fields**

<b>SLA Level:</b>	<input type="text" value="Low - 30 Days"/>
<b>SLA Violation Date:</b>	<input type="text" value="December 10, 2005"/> <input type="button" value="C"/>
<b>Service Requested Date:</b>	<input type="text" value="November 10, 2004"/> <input type="button" value="C"/>
<b>Service Satisfied Date:</b>	<input type="text"/> <input type="button" value="C"/>

**Demand Management Scheduling Fields**

<b>Estimated Start Date:</b>	<input type="text" value="November 1, 2005"/> <input type="button" value="C"/>
<b>Estimated Effort:</b>	
<b>Reject Date:</b>	<input type="text"/> <input type="button" value="C"/>
<b>Demand Satisfied Date:</b>	<input type="text"/> <input type="button" value="C"/>

**Notes**

Notes to be added on save:

**Status**

**References**

Save Successful 06:13:42 PM PST

## Understanding the Demand by Category Portlet

The Demand by Category portlet is personalized as:

- The Demand by Department portlet and the Demand by Business Initiative portlet on the preconfigured Demand Manager page (see [Figure 2-4 on page 24](#))
- The Team Demand by Priority portlet on the preconfigured Team Manager page (see [Figure 2-5 on page 26](#))

Each of these portlets displays IT demand data in a bar chart format. Resting the cursor over a bar in the bar chart opens a tooltip that lists more precise information about the IT demand data.

Fields in each portlet's preferences allow you to filter which data is to be included in the displayed charts and how it is to be organized (grouped). For example, you can use the **Group By** field (in the **Time Period** section) to group IT demand data by assigned user, by department, by business initiative, or by other groupings.

Your preferences, including the grouping you select, are listed under the portlet title. If you also want to change the portlet title from Demand by Category to reflect your particular grouping, as is done in the Demand by Category portlets on the preconfigured Dashboard pages shown in [Figure 2-4 on page 24](#) and [Figure 2-5 on page 26](#), click **Change Title** on the Edit Preferences page for the portlet.

## Understanding the Team Assignment Queue Portlet

The Team Assignment Queue portlet displays a table with IT demand data. From this portlet, you can view and assign a user to the IT demand. For more information about assigning users to an IT demand, see [Assigning IT Demand on page 37](#).

Fields in the portlet's preferences allow you to filter which data is to be included in the displayed table and how it is to be organized (grouped). For example, you can group IT demand data by assigned user or by department.

From the portlet results, you can drill down to the demand's request details by clicking the linked request number in the leftmost column of the portlet listings. For example, if you click request number **30423** in the Team Assignment Queue portlet in [Figure 2-5 on page 26](#), the request details appear as in [Figure 2-7](#).

Figure 2-7. Viewing IT demand from the Team Assignment Queue portlet

[Printable Version](#)

---

**DEM - Application Enhancement - #30423**

Description: Need report showing trends on a weekly basis - currently monthly basis Most Recent Note: ([View Notes Below](#))

Request Status: New ([View Full Status Below](#))

**Available Actions**

**Initial Review**

---

**Header**

**Summary**

**Request No.:** 30423 **Requested By:** Jane Smith  
**Request Type:** DEM - Application Enhancement  **Created On:** December 2, 2004  
**Workflow:** DEM - Enhancement Request Process **Request Status:** New

**Assigned To:**     
**Assigned Group:**    
**Requestor Department:**    
**Priority:**   **Application:**    
**Description:**

---

**Details**

**Enhancement Details**

**Enhancement Name:**   
**Detailed Description:**   
**New Enhancement:**  Yes  No **Suite:**   
**Requested By:**    
**Requestor Location:**   **Business Initiative:**

---

**Analysis**

**Estimated Completion Date:**

---

**Demand Management SLA Fields**

**SLA Level:**    
**SLA Violation Date:**    
**Service Requested Date:**    
**Service Satisfied Date:**

---

**Demand Management Scheduling Fields**

**Estimated Start Date:**    
**Estimated Effort:**    
**Reject Date:**    
**Demand Satisfied Date:**

---

**Notes**

---

**Status**

---

**References**

---

## 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 preconfigured Demand Manager page (see *Figure 2-4* on page 24)
- The Team SLA Exceptions By Dept portlet on the preconfigured Team Manager page (see *Figure 2-5* on page 26)

Each of these portlets displays SLA data in a bar chart format. Resting the cursor over a bar in the bar chart opens a tooltip that lists more precise information about the SLA data.

Fields in each portlet's preferences allow you to filter which data is to be included in the displayed charts and how it is to be organized (grouped). For example, you can group IT demand data by assigned user or by department.

If you click **View These Exceptions** on either portlet, the SLA Exceptions page appears, as shown in *Figure 2-8*.

Figure 2-8. Example SLA Exceptions page



SLA Exceptions				
No filters applied Ordered by: Request #.				
Req #Δ	Request Type	Priority	Reason	Description
30741	DEM - Application Enhancement	Critical	Critical - 3 Days	URGENT: Need Version Control SAW Upgrade v5.5.5

From this page, you can click a particular request number to see its details, as in the example of request 30741 in *Figure 2-9*.

Figure 2-9. Viewing an SLA from the SLA Exceptions list

[Printable Version](#)

**DEM - Application Enhancement - #30741**

Description: URGENT: Need Version Control S/W Upgrade v5.5.5      Most Recent Note: ([View Notes Below](#))

Request Status: New ([View Full Status Below](#))

**Available Actions**

**Initial Review**

[Resolution Pr...](#)   [Assign](#)   [More Info Req...](#)   [Schedule](#)   [Reject](#)

[Make a Copy](#)   [Delete](#)

[Expand All](#)   [Collapse All](#)   [Save](#)

**Header**

**Summary**

**Request No.:** 30741      **Requested By:** David Jones

**Request Type:** DEM - Application Enhancement [Change](#)      **Created On:** December 1, 2005

**Workflow:** DEM - Enhancement Request Process      **Request Status:** New

**Assigned To:**  [Add](#) [Clear](#)

**Assigned Group:**  [Add](#)

**Requestor Department:** Finance [v](#)

**\*Priority:** Critical [v](#)      **Application:** Version Control App [Add](#)

**\*Description:** URGENT: Need Version Control S/W Upgrade v5.5.5

**Details**

**Enhancement Details**

**\*Enhancement Name:** Version Control S/W Upgrade

**\*Detailed Description:** Need Version Control S/W Upgrade v5.5.5

**\*New Enhancement:**  Yes  No      **Suite:**  [v](#)

**\*Requested By:** December 1, 2004 [Add](#)

**Requestor Location:**  [v](#)      **\*Business Initiative:** Reduce order to delivery time [v](#)

**Analysis**

**Estimated Completion Date:**

**Demand Management SLA Fields**

**SLA Level:** Critical - 3 Days [Add](#)

**SLA Violation Date:** December 1, 2005 [Add](#)

**Service Requested Date:** December 1, 2005 [Add](#)

**Service Satisfied Date:**  [Add](#)

**Demand Management Scheduling Fields**

**Estimated Start Date:** December 1, 2005 [Add](#)

**Estimated Effort:**  [Add](#)

**Reject Date:**  [Add](#)

**Demand Satisfied Date:**  [Add](#)

**Notes**

**Status**

**References**

[Make a Copy](#)   [Delete](#)

[Save](#)



---

# 3 Processing IT Demand

---

## In This Chapter:

- *Overview of Analyzing IT Demand*
  - *Assigning IT Demand*
  - *Analyzing IT Demand*
  - *Scheduling and Rejecting IT Demand*
-

# Overview of Analyzing IT Demand

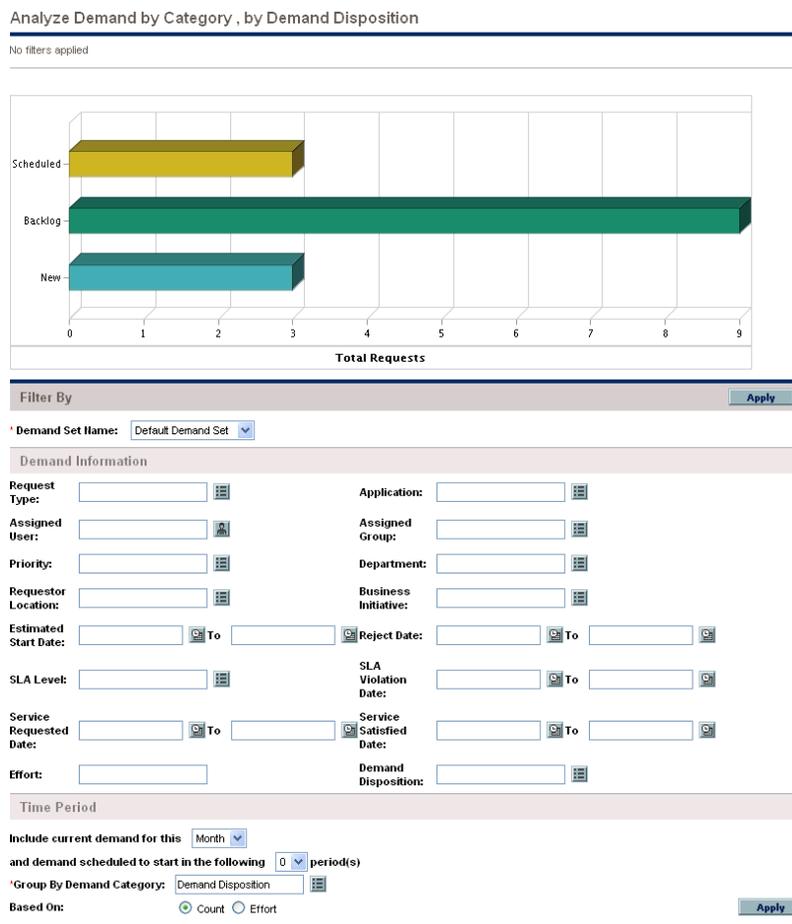
The Analyze Demand by Category page provides a graphical view of IT demand in terms of the number of IT demand requests. Resting the cursor over a section of a bar in the bar graph opens a tooltip that lists more precise information about the IT demand data.

You can configure the Analyze Demand by Category page to display a range of data related to IT demand, including IT demand by assigned user and IT demand by department. You can use the **Filter By** parameters to filter the displayed information.

To analyze IT demand:

1. Log on to PPM Center.
2. From the menu bar, select **Demand Management > Analyze Demand by Category**.

The Analyze Demand by Category page appears.



3. In the **Demand Set Name** field, select the demand set to analyze.
4. Complete the remaining fields in the **Filter By** section as needed. The filter fields determine what IT demand data is displayed and how that data is organized. For example, changing the entries in the **Time Period** section changes the time range of the IT demand data.
5. Click **Apply**.

On the Analyze Demand by Category page, IT demand is always presented in terms of the number of IT demand requests. The text at the top of the page is updated with the applied filter fields and display information.

## Assigning IT Demand

You can assign who will be working on the IT demand using the Team Assignment Queue portlet on the preconfigured Team Manager Dashboard page.

You can also add the Assignment Queue portlet to a PPM 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 PPM Center.
2. Open the Team Manager Dashboard page and see the Team Assignment Queue portlet, or open the Assignment Queue portlet.

Req#	Description	Priority	Request Type	Scheduled Start	Estimated Effort	Assign
30303	Need CSM patch #55462	Normal	DEM - Application Enhancement	2005-11-0...	5	<input type="text"/>
30330	ERP Patch v4.5.4.7 Migration Test	Normal	DEM - Application Enhancement	2005-12-1...	5	rlopez
30423	Need report showing trends on a weekly basis - currently monthly basis	High	DEM - Application Enhancement	2005-12-1...	5	rlopez
30424	Inventory control s/w needs report showing current shortfalls	High	DEM - Application Enhancement	2004-12-1...	5	jasmith
30741	URGENT: Need Version Control SAV Upgrade v5.5.5	Critical	DEM - Application Enhancement	2005-12-0...	5	<input type="text"/>

Showing 1 to 5 of 5    [Prev](#)    [Next](#)    [Maximize](#)

3. In the portlet, for the IT demand (row) of interest, click the icon next to the text box in the **Assign** column and select an entry.

The selected user is entered in the **Assign** field for that IT demand.

4. In the portlet, click **Assign**.

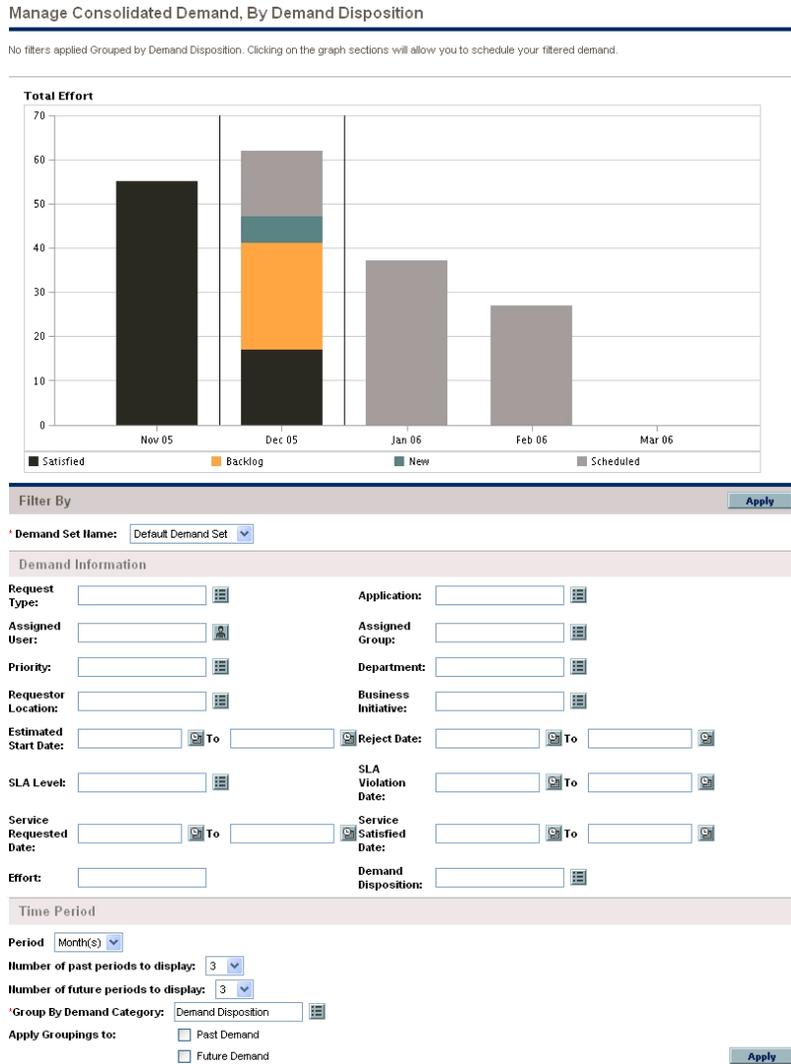
The selected user is assigned to the IT demand.

# Analyzing IT Demand

The Manage Consolidated Demand page provides a graphical view of IT demand in terms of effort, as shown in the example in *Figure 3-1*. IT demand can be analyzed, scheduled or rejected through the Manage Consolidated Demand page.

You can configure the Manage Consolidated Demand page to display a range of data related to IT demand. You can use the **Filter By** parameters to display a smaller, more focused set of items. You can specify the **Group By Demand Category** field to organize the display of IT demand accordingly, for example by assigned user or by department.

Figure 3-1. Example Manage Consolidated Demand page



Resting the cursor over a segment of a bar on the bar chart opens a tooltip that lists more precise information about the IT demand data.

Clicking a segment of a bar in the bar chart opens the Schedule Demand page, allowing you to schedule or reject the selected IT demand. For example, if you click the New segment of the stacked bar for Nov 04 in *Figure 3-1* (see the legend of colors at the bottom of the bar chart), that demand can be scheduled in the Schedule Demand page shown in *Figure 3-2*.

Figure 3-2. Example Schedule Demand page

Schedule Demand

No filters applied Grouped by: Demand Disposition.

**Done**

---

**Demand to be Scheduled**

Current Demand	Effort	Count
<input type="checkbox"/> Backlog	24.0	9
<input type="checkbox"/> New	6.0	3
<input type="checkbox"/> Scheduled	15.0	3
<b>Totals:</b>	<b>45.0</b>	<b>15</b>

**Check All** **Clear All**

Set estimated start for selected demand:  **Schedule**

Choose not to satisfy this demand: **Reject**

---

**Filter By** **Apply**

\* Demand Set Name: Default Demand Set

**Demand Information**

Request Type:  Application:

Assigned User:  Assigned Group:

Priority:  Department:

Requestor Location:  Business Initiative:

Estimated Start Date:  To  Reject Date:  To

SLA Level:  SLA Violation Date:  To

Service Requested Date:  To  Service Satisfied Date:  To

Effort:

Time Period: Month(s)

Show:

Current demand by demand disposition:

Scheduled demand starting in: Month of 12/1/05

\* Group By Demand Category: Demand Disposition

**Apply**

**Done**

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

To manage consolidated demand:

1. Log on to PPM Center.
2. From the menu bar, select **Demand Management > Manage Consolidated Demand**.

The Manage Consolidated Demand page appears (see *Figure 3-1* on page 38).

3. In the **Demand Set Name** field, select the demand set to analyze.
4. Complete the remaining fields in the **Filter By** section as needed. The filter fields determine what IT demand data is displayed and how that data is organized. For example, changing the entries in the **Time Period** section changes the time range of the IT demand data.
5. Click **Apply**.

The text at the top of the page is updated with the applied filter fields and display information.

[For More Information](#)

For more information on how to schedule and reject IT demand, see *Scheduling and Rejecting IT Demand*.

## Scheduling and Rejecting IT Demand

When analyzing your IT demand, you can schedule it 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. You might also decide to reject some of the IT demands.

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

To schedule or reject an IT demand:

1. Log on to PPM Center.
2. From the menu bar, select **Demand Management > Schedule Demand**.

The Schedule Demand page appears.

Schedule Demand

No filters applied Grouped by: Demand Disposition.

---

**Demand to be Scheduled**

Current Demand	Effort	Count
<input type="checkbox"/> Backlog	24.0	9
<input type="checkbox"/> New	6.0	3
<input type="checkbox"/> Scheduled	15.0	3
Totals:	45.0	15

Set estimated start for selected demand:

Choose not to satisfy this demand:

---

Filter By

\* Demand Set Name:

---

**Demand Information**

Request Type:	<input type="text"/>	Application:	<input type="text"/>
Assigned User:	<input type="text"/>	Assigned Group:	<input type="text"/>
Priority:	<input type="text"/>	Department:	<input type="text"/>
Requestor Location:	<input type="text"/>	Business Initiative:	<input type="text"/>
Estimated Start Date:	<input type="text"/> To <input type="text"/>	Reject Date:	<input type="text"/> To <input type="text"/>
SLA Level:	<input type="text"/>	SLA Violation Date:	<input type="text"/> To <input type="text"/>
Service Requested Date:	<input type="text"/> To <input type="text"/>	Service Satisfied Date:	<input type="text"/> To <input type="text"/>
Effort:	<input type="text"/>		
Time Period:	<input type="text" value="Month(s)"/>		
Show:			
<input checked="" type="radio"/> Current demand by demand disposition:	<input type="text"/>		
<input type="radio"/> Scheduled demand starting in:	<input type="text" value="Month of 12/1,05"/>		
*Group By Demand Category:	<input type="text" value="Demand Disposition"/>		

---

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

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

4. (Optional) Complete the remaining fields in the **Filter By** section as needed. The filter fields determine what IT demand data is displayed and how that data is organized. Then click **Apply**.

The Schedule Demand page is reloaded with filters applied.

- In the **Demand to be Scheduled** section of the Schedule Demand page, the IT demands that can be scheduled or rejected are listed collectively by the demand disposition shown in the **Current Demand** column.

Select the IT demand to be scheduled or rejected:

- To select all unscheduled IT demand, click **Check All**.
- To select all unscheduled IT demand of a specific demand disposition, click the checkbox next to that demand disposition.
- To select particular unscheduled IT demands, click the number in the **Count** column for the IT demands having the desired demand disposition, for example **New**.

The Schedule Demand page reloads, listing all of the IT demands that have the demand disposition you selected.

Schedule Demand

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

Request #	Description	Request Type	Estimated Effort	Scheduled Start	Demand Disposition	Application	Assigned User	Assigned Group	Priority	Department	Requestor Location	Business Initiative	Estimated Start Date	Reject Date	SLA Level	SLA Violation Date	Service Request Date
<input type="checkbox"/>	30738	Fix bug list categories	DEM - Application Bug	2.0		New	Other		Low	IS							
<input type="checkbox"/>	30739	Reconfigure version control...	DEM - Application Bug	2.0		New	Version Control App		Low	IS							
<input type="checkbox"/>	30740	Implement referral bonus	DEM - Application Bug	2.0		New	HR Application		Normal	IS							

Set estimated start for selected demand:

Choose not to satisfy this demand:

- Click the checkboxes next to the particular IT demands that are to be collectively scheduled or collectively rejected.
- Schedule or reject the selected IT demand:
  - To schedule the selected IT demand, click the **Calendar** icon to the right of the **Set estimated start for selected demand** field and select a date. Then click **Schedule**. The date you selected becomes the scheduled start date for the IT demand you selected.
  - To reject the selected IT demand, click **Reject**.

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