HP Project and Portfolio Management Center

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Tracking and Managing IT Demand Configuration Guide



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Chapter 1: Getting Started with Tracking and Managing IT Demand Configuration

- "Introduction to IT Demand Configuration" below
- "Overview of IT Demand Configuration" below
- "Related Information" on page 7

Introduction to IT Demand Configuration

HP Demand Management is an Project and Portfolio Management Center (PPM Center) product that provides a single application and repository to capture all IT demand placed on an IT organization. PPM Center consolidates information from many different sources to enable you to 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 to assign resources and distribute coverage of IT demand.

To capture and manage IT demand, you must configure HP Demand Management. To do this, you set up request types and workflows to track and manage demand, and set up Service Level Agreements (SLAs) and demand sets to meet IT demand requirements.

Overview of IT Demand Configuration

HP Demand Management lets you capture, analyze, and manage the demand placed on your IT organization. You can use it to track and manage different types of demand, which can range from requests for defect fixes to requests for new initiatives.

Note: This document details how to configure an HP Demand Management solution for managing IT demand. For details on how to track and manage your IT demand, see the *Tracking and Managing IT Demand User's Guide.*

To configure HP Demand Management for tracking and managing IT demand, perform the following steps.

Step 1: Create the IT demand request type.

To create the IT demand request type, you configure request types and their associated request header types to include the Demand Management Field Groups, and configure the SLAs in the request types. For more detailed information, see "Configuring IT Demand Request Types" on page 18.

Step 2: Configure the demand set.

To configure the demand set, you set up the demand fields and map them to fields on each demand request type. For more detailed information, see "Configuring Demand Sets" on page 8.

Step 3: Configure the workflow for IT demand tracking and management.

To configure the workflow for IT demand tracking and management, you use special transitions in your workflows that enable IT demand scheduling features. For more detailed information, see "Configuring Workflows for IT Demand" on page 31.

Step 4: Configure the SLAs.

To configure SLAs to correspond to an acceptable level of performance or reaction time for items managed through HP Demand Management, you must configure the request types with SLA-specific levels, violation dates, service request dates, and service satisfied dates. For more information, see "Configuring Service Level Agreements for IT Demand" on page 35

Accessing PPM Center

Businesses often control access to certain information and business processes. This is done to protect sensitive information such as employee salaries, or to simplify business processes by hiding data that is irrelevant to the user. PPM Center includes a set of features to help control data and process security by letting you determine the following types of access:

- Who can access certain windows or pages
- Who can view or edit certain fields
- What data to display in sensitive fields or screens
- Who can view, create, edit, or process PPM Center entities such as requests, packages, projects, portfolios, and programs
- Who can view, create or edit PPM Center configuration entities, such as workflows, request types, object types, and security groups
- Who can change security settings

The following features control the data and process security in PPM Center. You can combine these features in several ways to secure your system:

- Licenses. Each user is assigned a license that provides access to a set of PPM Center productrelated screens and functions. Licenses dictate potential behavior, but must be used with access grants to enable specific fields and functions.
- Access grants. Access grants are linked to users through security groups to determine which windows and functions users can access and use. Access grants also provide different levels of control over certain entities and fields.

For detailed information about security groups and access grants, see the Security Model Guide and Reference.

Related Information

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

- Getting Started
- Tracking and Managing IT Demand User's Guide
- HP Demand Management User's Guide
- HP Demand Management Configuration Guide
- Commands, Tokens, and Validations Guide and Reference
- Open Interface Guide and Reference
- Reports Guide and Reference
- Security Model Guide and Reference
- Customizing the Standard Interface
- Creating Portlets and Modules
- HP Time Management Configuration Guide
- HP Time Management User's Guide

Chapter 2: Configuring Demand Sets

- "Overview of Demand Sets" below
- "Creating Demand Sets " on page 10
- "Configuring Demand Set Fields " on page 11
- "Modifying the Mapping of Demand Set Fields to IT Demand Request Type Fields" on page 13
- "Copying Demand Sets" on page 15
- "Deleting Demand Sets" on page 15
- "Deleting IT Demand Request Types from Demand Sets" on page 16
- "Deleting Demand Set Fields from Demand Sets" on page 16

Overview of Demand Sets

Field naming conventions across different IT demand request types can vary. However, you may 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. This means that each demand set can have a unique mapping of IT demand fields to IT demand request type fields (see "Figure 2-1. Demand set field and IT demand request type field mapping" on the next page).



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

You can use the **Demand** menu to create and configure demand sets in the standard interface. If the **Demand** menu is not viewable, contact your application administrator.

The following sections provide instructions on how to perform the following tasks:

- Create a demand set
- Add fields to the demand set
- · Add IT demand request types to the demand set and map the fields

Creating Demand Sets

To create a demand set:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Demand Sets.**

The Demand Sets page opens.

Demand Set defines what is counted as demand for different par Center. This installation's Demand Sets are listed below:	rts of the organization. This allows management of demand by multiple groups within the same installation of HP Project and Portfolio Management			
Demand Set defines what is counted as demand for different parts of the organization. This allows management of demand by multiple groups within the same installation of HP Project and Portfolio Management Center. This installation's Demand Sets are listed below:				
Demand Set Des	cription			
Default Demand Set This	is a default Demand Set created by the installer.			
R & D Demand Set R & I	D Demand Set.			
Sales IT Demand Set Dem	and Set for IT sales.			

3. Click Create New Demand Set.

The Demand Set - New Demand Set page opens.

Demand Se	t - New Demand Set		
Сору	Delete	Create	Cancel
* Name:	New Demand Set		
Description: Enabled:	Yes [®] No		
Demand Field	Request Types		
Select the fields t	at will determine what demand is included in this set:		
Field Nam	e Search Validation		
	E Add Field		
Сору	Delete	Create	Cancel

- 4. In the **Name** field, type the name of the new demand set.
- 5. In the **Description** field, you can type a short description of the demand set.

Note: Until you add at least one field to the demand set and map it to a request type (see "Configuring Demand Set Fields " on the next page), the **Enabled** option is unavailable. After you add fields and map them to request types, you can make the demand set available to the system.

- 6. Click the **Request Types** tab.
- 7. In the Add Request Type field, select an IT demand request type from the list.

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

8. 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.

- 9. To select more request types, repeat step 7 and step 8.
- 10. Click Create.

A message window opens.

11. Read the message and click **OK**.

The demand set is created.

Configuring Demand Set Fields

Once the demand set is configured, you must configure the fields associated with a demand set. Once configured, these demand set fields must 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 configure a demand set field:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Demand Sets.**

The Demand Sets page opens.

Demand Set Setimes what is counted as demand for different parts of the organization. This allows management of demand by multiple groups within the same installation of HP Project and Portfolio Management					
Center. This installation's Demand Sets are	listed below:				
Demand Set	Description				
Default Demand Set	This is a default Demand Set created by the installer.				
R & D Demand Set	R & D Demand Set.				
Sales IT Demand Set	Demand Set for IT sales.				
Create New Demand Set					

3. Click the name of a demand set.

The Demand Set page opens.

4. On the Demand Set page, select the **Demand Fields** tab.

The **Demand Fields** tab opens.

Dem	and Set - Default Demand Set						
Coj	Delete					Done	Cancel
* Name	: Default Demand Set						
Descri	ption: This is a default Demand Set create	d by the installer.					
Enable	d: 💿 Yes 🔘 No						
De	mand Fields Request Types						
Select t	he fields that will determine what demand is in	cluded in this set:					
	Field Name	Search Validation					
×	Application	DEM Filter - Application - E					
×	Assigned User	DEM Filter - User Id - Enab					
×	Assigned Group	DEM Filter - Security Grou					
×	Priority	DEM Filter - Priority - Enab					
×	Department	DEM Filter - Department -	E 🔳				
×	Requestor Location	DEM Filter - Requestor Lo	. 🔳				
×	Business Initiative	DEM Filter - Business Initia					
×	Estimated Start Date	Date					
×	Reject Date	Date					
×	SLA Level	DEM - SLA Level					
×	SLA Violation Date	Date					
×	Service Requested Date	Date					
×	Service Satisfied Date	Date					
×	Effort	Numeric Text Field					
				Add Field			
Coj	Delete					Done	Cancel

- 5. Create a demand set field:
 - a. At the bottom of the **Field Name** column, in the empty field, type a field name.
 - b. At the bottom of the **Search Validation** column, in the empty field, select the validation from the list.

The search validation offers the full set of available values. For example, if one demand type is only available to users in the United States and another is 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. Click Add Field.

The configured field is saved to the demand set. A delete icon is displayed next to the configured field. A new, empty field is made available.

- 6. Map the demand set field to a request type. Select the **Request Types** tab.
- 7. Under Field Mapping, map the fields of the **Demand Fields** column to the fields of the **Request** Type Field column.

Select the IT demand request type field using the list. Map the **Demand Fields** to **Request Type Fields** with the same validation type. The information stored in the fields should be similar across the multiple IT demand request types. This enables you to view an accurate picture of demand across multiple demand types.

8. Click Done.

A message window opens.

9. Read the message and click **OK**.

The fields are added to the demand set.

Modifying the Mapping of Demand Set Fields to IT Demand Request Type Fields

Mapping a demand set field to an IT demand request type field is completed when configuring the demand set field.

To modify the mappings:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Demand Sets.**

The Demand Sets page opens.

Demand Sets					
Demand Set defines what is counted as demand for different parts of the organization. This allows management of demand by multiple groups within the same installation of HP Project and Portfolio Management Center. This installation's Demand Sets are listed below:					
Demand Set	Description				
Default Demand Set	This is a default Demand Set created by the installer.				
R & D Demand Set	R & D Demand Set.				
Sales IT Demand Set	Demand Set for IT sales.				
Create New Demand Set					

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

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

Done

The Request Types tab page opens.

Demand Set - Default Demand Set					
Copy Delete					Done Canc
Name: Default Demand Set					
Description: This is a default Demand Set created by	the installer.				
Enabled: O Yes No					
Demand Fields Request Types					
Select the Request types which will be counted as demand	d in this set. Then select which fi	eld in the Request Type will be n	apped to eac	n of the Demand Fields	
Add Request Type:	Add				
Request Types:	Field Mapping:				
DEM - Application Bug	Demand Fields	Request Type Field			
DEM - Application Enhancement DEM - Database Refresh	Application	Application: (Request Hea			
	Assigned User	Assigned To: (Request He			
	Assigned Group	Assigned Group: (Reques			
	Priority	Priority: (Request Header			
	Department	Requestor Department: (R			
Remove	Requestor Location	Requestor Location: (Requ			
	Business Initiative	Business Initiative: (Reque			
	Estimated Start Date	Estimated Start Date: (Derr			
	Reject Date	Reject Date: (Demand Man			
	SLA Level	SLA Level: (Demand Mana			
	SLA Violation Date	SLA Violation Date: (Dema	re i		
		· · · ·			
	Service Requested Date	Service Requested Date: (
	Service Requested Date Service Satisfied Date	Service Requested Date: (De Service Satisfied Date: (De Se			
	Service Requested Date Service Satisfied Date Effort	Service Requested Date: (D Service Satisfied Date: (D Estimated Effort: (Demand			

5. Under Field Mapping, modify the Request Type Field column.

Select the IT demand request type field using the list. Map the **Demand Fields** to **Request Type Fields** with the same validation type. The information stored in the fields should be similar across the multiple IT demand request types. This lets you view an accurate picture of demand across multiple demand types.

- 6. Repeat the process as many times as necessary.
- 7. On the Demand Set page, click **Done.**

The changes to the demand set are saved.

Copying Demand Sets

To copy a demand set:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Demand Sets.**

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

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

A copy of the demand set is created.

- 5. On the Demand Set page of the copy, in the **Name** field, type a new name for the copied demand set.
- 6. Click Done.

A message window opens.

7. Read the message and click OK.

The copy of the demand set is completed.

Deleting Demand Sets

To delete a demand set:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Demand Sets.**

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

4. On the Demand Set page, click Delete.

A delete confirmation window opens.

5. In the delete confirmation window, click OK.

The selected demand set is deleted.

Deleting IT Demand Request Types from Demand Sets

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

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Demand Sets.**

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

- 4. Click the **Request Types** tab.
- 5. In the **Request Types** field, select an IT demand request type.
- 6. Below the **Request Types** field, click **Remove.**

The request type is removed from the **Request Types** field.

7. In the Demand Set page, click **Done.**

A message window opens.

8. Read the message and click **OK**.

The request type is removed from the demand set.

Deleting Demand Set Fields from Demand Sets

To delete a demand set field from a demand set:

- 1. Log on to PPM Center.
- 2. From the menu bar, select Open > Administration > Demand Sets & Processes > Manage

Demand Sets.

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

- 4. Click the **Demand Fields** tab.
- 5. Click the Delete icon next to the demand set field.

A delete confirmation window opens.

6. In the delete confirmation window, click **OK**.

The demand set field is removed.

7. In the Demand Set page, click **Done.**

The demand set field is deleted from the demand set.

Chapter 3: Configuring IT Demand Request Types

- "IT Demand Request Types Overview" below
- "Overview of Creating IT Demand Request Types " on page 20
- "Adding IT Demand to Request Header Types " on page 21
- "Adding Request Header Types to Request Types" on page 24
- "IT Demand SLA Fields " on page 27
- "IT Demand Schedule Fields " on page 28
- "Configuring Effort for IT Demand " on page 29

IT Demand Request Types Overview

Requests are a fundamental work unit of a request tracking and resolution system. Users create, and then submit requests along a resolution process that is defined in the assigned workflow.

The request page contains all information typically required to complete a specific business process. The HP Demand Management solution for managing and tracking IT demand requires that two specific categories (and associated fields) be included on an IT demand request type (see "Figure 3-1. IT demand request" on the next page):

- HP Demand Management SLA fields
- HP Demand Management scheduling fields

Figure 3-1. IT demand request

Cre	ate New DEM - Application Bug				
]	
Exc	and All I Collapse All			Su	omit Cancel
	Summary				
	Requested By:				
	Admin User				
	Request Status:				
	Unreleased				
	Workflow:				
	DEM - Bug Request Workflow				
	Assigned To:				
		a 🗖			
	Assigned Group:				
	Requestor Department:	_			
	-Drineiter	·	Application		
	-Phoney:	-	Application:		
	*Description:	-			
+	Problem/Resolution				
+	Environment				
+	Analysis				
	Paris de la formation				
+	Project Information				
-	Demand Management SLA Fields				
	SLA Level:				
	SLA Violation Date:				
	Service Requested Date:				
	Service Requested bates				
	Service Satisfied Date:				
-	Demand Management Scheduling Fields				
	Selfande d Anet Deter				
	Estimated Start Date:				
	Estimated Effort:				
					2
	Reject Date:				
					1 North Contraction of the second sec
	Demand Satisfied Date:				
					😰
+	Notes				
	D (
+	References				

Adding the IT demand fields to a request requires changes to the associated request type. If you do not want to change a request type, you can create a new request type that includes the IT demand fields.

Default IT Demand Request Types

"Table 3-1. IT demand request types" below provides a list of the HP-supplied IT demand request types.

Table 3-1. 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 Attribute

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 after a request is first created.
- Criteria for Editable Fields. Fields can be set to become read-only based on their settings. For example, the SLA Level field might be read-only after a request is first created and editable after the request is accepted.
- Criteria for Default Fields. Fields can be configured to update automatically based on the settings. For example, the SLA Violation Date can be automatically updated based on the SLA Level and Service Requested Date fields.

For more information about how to configure request types, see the *HP Demand Management Configuration Guide.*

Overview of Creating IT Demand Request Types

To create an IT demand request type:

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

See "Adding IT Demand to Request Header Types " on the next page.

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

For instructions, see "Adding Request Header Types to Request Types" on page 24.

Step 3: Configure the SLA fields.

For instructions, see "IT Demand SLA Fields " on page 27.

Adding IT Demand to Request Header Types

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

- 1. Log on to PPM Center.
- 2. From the menu bar, select Open > Administration > Open Workbench.

The PPM Workbench opens.

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

The Request Header Type Workbench opens.

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

The Request Header Type window opens.

🚺 Request Header Type : DEM - Appl	ication Er	nhancement			- • ×
Request Header Type Name: DEM - Application Enhancement					
Reference Code: DEM	APPLICA		CEMENT		
Description: DEM -	- Dofault R	- anuest Header	Тура		
Description. DEm-	Delaultin	equestineader	Type		
Extension: 🔹 Enabled: 💿 Yes 🔘 No					
Fields Layout Filter Ownership User Data References					
Prompt	Displ	Display Only	Transaction Hist.	Notes Hist.	On Search/F
E Summary					A
Request No.:	Y	Y	N	N	
Requested By:	Y	Y	N	N	
Request Type:	Y	N	N	N	
Created On:	Y	Y	N	N	
Sub-Type:	N	N	N	N	
Request Status:	Y	Y	N	N	
Workflow:	Y	Y	N	N	
Assigned To:	Ŷ	N	N	N	
Contact Name:	N	N	N	N	
Assigned Group:	Y	N	N	N	
Contact Phone:	N	Ý	N	N	
Requestor Department:	Y N	N	N	N	
Contact Email:	IN	"	IN	IN	
					, , , , , , , , , , , , , , , , , , ,
	New	Edit	Remove Field	Groups	
OK Save Cancel					
Ready					

5. Make sure that the request header type general information is complete.

The following table provides a list of the general information fields and descriptions for request header types.

Field Name	Description
Request Header Type Name	Name of the request header type
Description	Description of request type use
Extension	For release types created for an HP Deployment Management Extension. Select the Extension from the list.
Enabled	Indicates whether or not the request type is available to PPM Center.

6. Click Field Groups.

The Field Groups window opens.

Field Gro	oups X
Please er	nable the Field Groups necessary for the desired functionality of this Request Header Type:
Enabled	Description
	CMQC Application Project: CMQC Application Project (Also include PFM Project and CMQC QC/ALM Ins
	CMQC Project Status: CMQC Project Status field group
	CMQC QC/ALM Administration: CMQC QC/ALM Administration field group
	CMQC QC/ALM Instance: CMQC QC/ALM Instance field group
	CMQC Test Status: CMQC Test Status field group
	CMQC Testing Project: CMQC Testing Project (Also include PFM Project and CMQC QC/ALM Instance f
	Demand Management SLA Fields: This Field Group contains the fields necessary to manage requests w
V	Demand Management Scheduling Fields: This Field Group allows a request to be scheduled with the De
	PFM Asset: Allows Requests to be considered as Assets in a Portfolio.
	PFM Project: Required for any request type that will represent a project lifecycle (regardless of wheth
•	PFM Proposal: Allows Requests to be considered as Proposals in the Portfolio Management process.
	OK Cancel
Ready	

7. Select the checkboxes for the IT demand fields.

The IT demand fields are:

- Demand Management SLA Fields
- Demand Management Scheduling Fields
- 8. Click OK.

The Field Groups window closes. The selected IT demand fields are displayed in the Request Header Type window. To view the IT demand fields, select the **Fields** tab. Expand the category heading to view the associated fields.

🕼 Request Header Type : DEM - Application Enhancement					
Paguest Header Type Name: DEM_Application Enhancement					
	Request header Type Name. Dem - Application Enhancement				
Reference Code:DEM_	APPLICA	TION_ENHANG	CEMENT		
Description: DEM - I	Default R	equest Header	Туре		
Extension:		•	Ena	abled: 💿 Yes	No
Fields Layout Filter Ownership	User Da	ta References	3		1
Prompt	Displ	Display Only	Transaction Hist.	Notes Hist.	On Search/Filter Pages
Work Item Fields					
🚊 - Demand Management SLA Field:					
SLA Level:	Y	N	N	N	Y
SLA Violation Date:	Y	N	N	N	Y
Service Requested Date:	Y	N	N	N	Y
Service Satisfied Date:	Y	N	N	N	Ŷ
Demand Management Schedulin					
Estimated Start Date:	Y	N	N	N	Y
Estimated Effort:	Y	N	N	N	Y
Reject Date:	Y	N	N	N	Ý
Demand Satisfied Date:	Y	N	N	N	Y
H All All New Edit Remove Field Groups					
					OK Save Cancel
Ready					

9. Complete the request header type as required.

See the HP Demand Management Configuration Guide.

10. In the **Enabled** field, click **Yes.**

The request header type is enabled.

11. 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.

For More Information

For more information about how to configure request types, see the *HP Demand Management Configuration Guide.*

Adding Request Header Types to Request Types

To add a request header type to a request type:

Tracking and Managing IT Demand Configuration Guide Chapter 3: Configuring IT Demand Request Types

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Open Workbench.**

The PPM Workbench opens.

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

The Request Type Workbench opens.

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

The Request Type window opens.

🙆 Request Type : DE	EM - Application Enhancen	nent						
Request Type Name:	DEM - Application Enhancement			Reference Code: _DEM_APPLICATION_ENHANCEMENT				
Creation Action Name:	Request an Application Enhancement				-			
Category:			•	Request Header	Type:	DEM - Application E	nhancement	
Extension								New Open
Externation.			•					
Description:	Application Enhancemen	ts should be used t	to request	t new functionalit	y in IT cu	urrent applications		
Meta Layer View:	MREQ_ DEM_A	PPS_ENHANCEM	ENT					
Max Fields:	50			▼ Enabled: @	Yes		No	
Commands	Sub-Types Workflows	User Access	Not	tifications	ser Data	Ownership	Help Content	Resources
Fields	Layout Displa	y Columns	I	Request Status		Status De	pendencies	Rules
Prompt		Token	Enab	Component Ty	pe	Validation		Display
⊕ - Summary		1		1				
🕀 Work Item Field	S							
🗄 Enhancement D)etails							
🗄 Analysis								
🗄 🗠 Demand Manag	ement SLA Fields							
🗄 🖻 Demand Manag	ement Scheduling Fields							
K								
			II New	Edit	Remove			
							OK Sav	e Cancel
Ready								

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

The following table lists general information fields and definitions for request types.

Field Name	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.

Field Name	Description
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 an HP Deployment Management Extension. Select the Extension from the list.
Description	Description of how to use the request type.
Meta Layer View	Meta layer views relate information specific to the PPM 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 PPM 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. To start to create a new request header type, click New .

6. In the **Request Header Type** field, select the IT demand request header type from the list.

All enabled request header types are displayed in the 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.

7. Complete the request type as required.

See the HP Demand Management Configuration Guide.

- 8. For the **Enabled** option, select **Yes.**
- 9. Click **OK.**

For more information about request type configuration, see the *HP Demand Management Configuration Guide*.

IT Demand SLA Fields

IT demand can be tracked and reported by 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** is set upon initiation on the request. 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 occurs.

Figure 3-2. IT demand SLA fields

+ Enhancement Details	
+ Analysis	
- Demand Management SLA Fields	
SLA Level:	
Critical - 3 Days	
SLA Violation Date:	
January 23, 2013	P
Service Requested Date:	
January 21, 2013	P
Service Satisfied Date:	
	R
+ Demand Management Scheduling Fields	

The service requested date need not correlate to the request creation date. For example, the customer SLA might be based on the time it takes to implement a bug fix after bug approval (rather than bug creation).

"Table 3-2. IT demand SLA fields" below lists the IT demand SLA fields.

Field Name	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:
	Critical - 3 Days
	• High - 5 Days
	Normal - 15 Days
	• Low - 30 Days

Table 3-2. IT demand SLA fields

Field Name	Description
SLA Violation Date	The SLA Violation Date is set by a rule based on Service Level and Service Requested Date . The SLA violation date equals the service requested date plus the time specified by the service level validation.
Service Requested	The Service Requested Date is set by a rule to the creation date of the request. It can 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.

Table 3-2. IT demand SLA fields, continued

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.

Figure 3-3. IT demand schedule fields

+ Enhancement Details	
+ Analysis	
+ Demand Management SLA Fields	
- Demand Management Scheduling Fields	
Estimated Start Date:	
January 22, 2013	P
Estimated Effort:	
	5
Reject Date:	
	1 Alian A
Demand Satisfied Date:	
	P

"Table 3-3. IT demand scheduling fields" below lists the IT demand scheduling fields.

Table 3-3. IT demand scheduling fields

Field Name	Description
Estimated Start Date	The anticipated date when the task to complete the IT demand will start. The Estimated Start Date is provided by the IT manager or responsible IT work scheduler.

Field Name	Description
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:
	• 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 provided by the IT manager or responsible IT work scheduler.
Demand Satisfied Date	The date the IT demand was completed. The Demand Satisfied Date is provided by the IT manager or responsible IT work scheduler.

Table 3-3. IT demand scheduling fields, continued

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 defect fixes. If a database refresh takes one hour to fulfill and a defect 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 assigned to it (see "IT Demand Schedule Fields " on the previous page). This effort can be reconfirmed or changed during an analysis phase later 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:

Tracking and Managing IT Demand Configuration Guide Chapter 3: Configuring IT Demand Request Types

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Open Workbench.**

The PPM Workbench opens.

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

The Request Type Workbench opens.

- 4. To view the complete list of request types, click List.
- 5. Open an IT demand request type or create a new IT demand request type.

The Request Type window opens to the Fields tab.

- 6. Click the **Rules** tab.
- 7. Select **Default for Estimated Effort**, and then click **Edit**.

The Rules window opens and displays the Default for Estimated Effort.

8. In the **SQL** field, change the default number.

For example, to set the Default for Estimated Effort to 10, change

select 5,5 from dual

to

select 10,10 from dual

- 9. In the Rules window, click OK.
- 10. Click **OK**.

Chapter 4: Configuring Workflows for IT Demand

- "Overview of IT Demand and Workflows " below
- "Accessing the IT Demand Workflows" on the next page
- "Configuring IT Demand Transitions" on page 33
- "Managing IT Demand Event Errors " on page 33

Overview of IT Demand and Workflows

The schedule, reject, and assign functions in HP 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 this transition is not defined for the current workflow step, no processing occurs, but the IT demand is still marked as scheduled, rejected, or assigned (see "Figure 4-1. Workflow step without IT demand transitions" below and "Figure 4-2. Workflow step with IT demand transitions" below and "Figure 4-2. Workflow step with IT demand transitions" below.

Figure 4-1. Workflow step without IT demand transitions







Accessing the IT Demand Workflows

PPM Center includes a quick way to select and open IT demand workflows. The following section includes details about how to open the following workflows:

- Bug (defect) fixes
- Enhancement requests
- Initiatives

Accessing the Bug Fix Workflow

To quickly access the Bug Fix Workflow Workbench:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage Bug Fix Process.**

The workflow for IT demand bug fixes opens.

Accessing the Enhancement Workflow

To quickly access the Enhance Workflow Workbench:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage** Enhancement Process.

The workflow for IT demand enhancements opens.

Accessing the Initiative Workflow

To quickly access the Initiative Workflow Workbench:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Open > Administration > Demand Sets & Processes > Manage** Initiative Process.

The workflow for IT demand initiatives opens.

Configuring IT Demand Transitions

HP 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, in the Define Transition window (see "Figure 4-3. Specific event transition from a workflow step" below), select **Specific Event**, and then specify the event for the transition.

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

- Assign Demand
- Schedule Demand
- Reject Demand

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

Define Transitio	n
Specific Result:	= •
Other Results:	
All Results:	
Specific Event:	Assign Demand 🔹
Specific Error:	Assign Demand
Other Errors:	Schedule Demand Reject Demand
All Errors:	
Require Notes or	1 Transition
	OK Add Cancel
Ready	

For more information about how to configure workflow steps, see the *HP Demand Management Configuration Guide.*

Managing IT Demand Event Errors

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

- There is required look-ahead for the transition. The exception to this exception is when the lookahead requires you to specify an assigned-to user during the assignment of IT demand.
- You do not have the required security permissions (IT demand request type and workflow step) to transition out of the workflow step.
- The IT demand request type is locked for editing by another user.

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

Chapter 5: Configuring Service Level Agreements for IT Demand

- "Setting Up Service Level Agreements for IT Demand" below
- "SLA Behavior" below
- "Configuring SLA Rules" on the next page

Setting Up Service Level Agreements for IT Demand

The HP Demand Management IT demand solution tracks and reports on a predefined set of service level agreements (SLAs). SLAs correspond to an acceptable level of performance or reaction time for items you manage through HP Demand Management. After you configure the IT demand types, demand sets and workflows, you can use request type rules and validations to set up the SLAs.

In the default HP Demand Management for IT demand solution installation, SLAs are only enabled for the Database Refresh demand type. However, you can enable SLAs for all IT demand types.

SLA Behavior

SLA behavior is driven by the Demand Management SLA fields on the request type. The SLA fields are shown in "Figure 5-1. Demand Management SLA Fields" below.

Figure 5-1. Demand Management SLA Fields

+ Enhancement Details	
+ Analysis	
- Demand Management SLA Fields	
SLA Level:	
Critical - 3 Days	
SLA Violation Date:	
January 23, 2013	R
Service Requested Date:	
January 21, 2013	R
Service Satisfied Date:	
	P
+ Demand Management Scheduling Fields	

Service Requested Date is set when the request is submitted. The SLA Level is set in the request. The Request SLA Violation Date is then calculated. If the request is not satisfied before the date specified in the SLA Violation Date field, an SLA exception occurs.

Note: The service requested date does not need 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 marks the end of the request resolution process. Demand Management for IT demand can be set to be satisfied at any point in the process.

Configuring SLA Rules

SLA behavior is based on the request type rules and workflow configurations. "Figure 5-2. DEM - Application Enhancement request type" below shows an example of the SLA fields on a request type.

Figure 5-2. DEM - Application Enhancement request type

🕼 Request Header Type : DEM - Application Enhancement 📃 💼 💌							
Request Header Type Name: DEM - Application Enhancement							
Reference Code: DEM APPLICATION ENHANCEMENT							
Description: DEM - I	Description: DEM - Default Request Header Type						
	Jonaanin	l					
Extension:		•	Ena	ibled: 💿 Yes	© No		
Fields Layout Filter Ownership	User Da	ta References					
Prompt	Displ	Display Only	Transaction Hist.	Notes Hist.	On Search/Filter Pages		
					Î Î		
Work Item Fields							
🚊 🗠 Demand Management SLA Field:							
SLA Level:	Y	N	N	N	Y		
SLA Violation Date:	Y	N	N	N	Y		
Service Requested Date:	Y	N	N	N	Y		
Service Satisfied Date:	Y	N	N	N	Y		
Demand Management Schedulin							
Estimated Start Date:	Y	N	N	N	Y		
Estimated Effort:	Y	N	N	N	Y		
Reject Date:	Y	N	N	N	Y		
Demand Satisfied Date:	Y	N	N	N	Ŷ		
He All He All New Edit Remove Field Groups							
OK Save Cancel							
Ready							

Note: If you use a validation to store the SLA configuration information, the validation is easier to change. Use one validation per request type with an SLA.

Configuring SLA Levels

The **SLA Level** is set by a rule based on request priority. The validation for the **SLA Level** field is DEM - SLA Level. "Figure 5-3. SLA Level Rule and Validation windows" on the next page 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



Rules Window							×
Rule Name: SLA Leve	el & SLA Violatio	on Date Setup					
Description: SLA Leve	el & SLA Violatio	on Date Setup					
Enabled? Yes	0	No					
Rule Event: Apply on	field change	•		Process su	bsequent rules? 💿 Yes 🔘 I	No	
Rule Type: Advance	d	•		(If an event t Check 'No' a rule complet	triggers multiple rules, they are , above if you do not want subseq tes.)	processed in sequential quent rules to be proces	l order. sed after this
Dependencies							
Field Name				Condition			
Priority:				contains an	iy value		
Results Result Fields: Field Name SLA Violation Date: SLA Level:	Column T 1 R 2 R 3 R	oken EQ.P.KNTA_SLA_ EQ.VP.KNTA_SLA EQ.P.KNTA_SLA EQ.VP.KNTA_SLA	VIOLATION_DAT	TE	Logic: SQL De SELECT sysdate + to_number(kl.d sysdate + to_number(kl.d kl.meaning.	efault ? lescription), fescription),	
	New	III Remove		•	kl.meaning FROM knta_lookups kl WHERE kl.lookup_type = AND kl.lookup_code = AND kl.enabled_flag =	'DEM-SLA Level : Bu : '[REQ.PRIORITY_C' : Ύ	'g' ODE]'
						OK Add	Cancel
Ready							

🚺 Validation : D	EM - SLA Level				- • ×
Name	DEM - SLA Level	DEM - SLA Level Reference Code: _DEM_SLA_LEVEL			
Description	:				
Enabled	. √		Use in Workflow? 📄		
Component Type	Auto Complete List				-
Validated By:	_ist	~	Expected list length	: 🔘 Short 🔿 Lon	ig
Selection mode:	Starts With OC	ontains	Number of results p	er page: 50	
Enable Hierarchi	ical Selection?				
Configuration	Filter Fields Filter Layou	ut Hierarchical Display			
Validation Values	:				
Seq	Code	Meaning	Description	Enabled	Default
1	CRITICAL	Critical - 3 Days	3	Y	N
21	HIGH	High - 5 Days	5	Y	N
31	NORMAL	Medium - 15 Days	15	Y	N
41	LOW	Low - 30 Days	30	Y	N
<		JII.			- F
	[New Edit Delet	e Copy From	₽.	
Used By	Ownership			ОК	Save Cancel
Ready (Read-Onl	y, Seed Data)				

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 plus the time determined by the service level validation. "Figure 5-4. SLA violation date rule" below shows the Rules window for SLA violation date.

Figure 5-4. SLA violation date rule

Rules Window		×
Rule Name: SLA Leve	el & SLA Violation Date Setup	
Description: SLA Leve	el & SLA Violation Date Setup	
Enabled? 💿 Yes	⊘ No	
Rule Event: Apply on	field change 👻	Process subsequent rules? () Yes () No
Rule Type: Advance	d 🗸	(If an event triggers multiple rules, they are processed in sequential order. Check 'No' above if you do not want subsequent rules to be processed after this rule completes.)
Dependencies		
Field Name		Condition
Priority:		contains any value
- Results		
Field Name	Column Token	Logic: SQL Default
SLA Violation Date: SLA Level:	1 REQ.P.KNTA_SLA_VIOLATION_I 2 REQ.VP.KNTA_SLA_VIOLATION 3 REQ.P.KNTA_SLA_LEVEL 4 PEO.VR.KNTA_SLA_LEVEL	DATE SELECT DATE sysdate + to_number(kl.description), sysdate + to_number(kl.description), kl.meaning.
•	IN REG.VP.KNTA_SLA_LEVEL	kl.meaning FROM knta_lookups kl WHERE kl.lookup_type = 'DEM-SLA Level : Bug' AND kl.lookup_code = '[REQ.PRIORITY_CODE]' AND kl.enabled_flag = 'Y'
Ready		OK Add Cancel

Configuring Service Requested 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. Service requested date rule" on the next page shows the rules window for service requested date.

Rules Window	×
Rule Name: Service Requested On Setup	
Description: Default Service Requested On Setup	
Enabled? 💿 Yes 💿 No	
Rule Event: Apply on creation	Process subsequent rules? Yes No
Rule Type: Advanced 🔹	(If an event triggers multiple rules, they are processed in sequential order. Check 'No' above if you do not want subsequent rules to be processed after this rule completes.)
Dependencies	
Field Name	Condition
Priority:	contains any value
Results	: Remove
Result Fields:	
Field Name Column Token	Cogic: SQL Delault • :
Service Requested 1 REQ.P.KNTA_SLA_SERV	_REQUESTED_ON SELECT
2 REQ.VP.KNTA_SLA_SER	V_REQUESTED_OT systate, systate
	FROM dual
▲	4
New Remove	
	OK Add Cancel
Ready	

Configuring Service Satisfied Dates

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



Discution	1				×
Execution Owne	rship User Data Used By				
Name	DEM - SLA Satisfied On		Workflow Scope	ALL	
Reference Code	_DEM_SLA_SATISFIED_O	N			
Description	DEM - Scope Check				
Execution Type	Workflow Step Commands	•	Workflow Event	NONE	.
Validation WF -	Standard Execution Results	I	Timeout		Days
		New Open	Icon	question2.gif	
Processing Type	Immediate	-	Enabled:	Yes	No
Execution:			4		
Commands		Command Steps —			
Command	Conditio	Command			
Set Request	t Satisfied On [WFS.ST	ksc_store KNTA_DE	MAND_SATISFIED	_DATE="[WFI.P.TEMP	_DATE]","[WFI.P.TEMP_DATE]" -dateForm
<	•	•			
HAI AI Edit Cmd Edit Cmd Copy Cmd Remove					
Verify Lan	guage Options				OK Save Cancel
Ready					

Dit Command			×
Command:	Set Request Satisfied On		
Condition:	'[WFS.STEP_NAME]' = 'SLA_CLOSE'		
Description:			
Timeout (s):	90		
Enabled:		💿 Yes 💿 No	
Steps:			
ksc_store KNTA_DEMAND_SAT	ISFIED_DATE="[WFI.P.TEMP_DATE]","[W	WFI.P.TEMP_DATE]" -dateForm	at "YYYY-MM-DD HH24:MI:SS"
Tokens Special Cmd	Show Desc		OK Apply Cancel
Ready			

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We appreciate your feedback!