

HP Project and Portfolio Management Center

Software Version: 9.30

Tracking and Managing IT Demand User's Guide

Document Release Date: September 2014
Software Release Date: September 2014



Legal Notices

Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Copyright Notice

© Copyright 1997 - 2014 Hewlett-Packard Development Company, L.P.

Trademark Notices

Adobe® is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

UNIX® is a registered trademark of The Open Group.

Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To check for recent updates or to verify that you are using the most recent edition of a document, go to: <http://h20230.www2.hp.com/selfsolve/manuals>

This site requires that you register for an HP Passport and sign in. To register for an HP Passport ID, go to: <http://h20229.www2.hp.com/passport-registration.html>

Or click the **New users - please register** link on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

The following table indicates changes made to this document since the last released edition.

Support

Visit the HP Software Support Online web site at: <http://www.hp.com/go/hpsoftwaresupport>

This web site provides contact information and details about the products, services, and support that HP Software offers.

HP Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support web site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To register for an HP Passport ID, go to:

<http://h20229.www2.hp.com/passport-registration.html>

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

HP Software Solutions Now accesses the HPSW Solution and Integration Portal Web site. This site enables you to explore HP Product Solutions to meet your business needs, includes a full list of Integrations between HP Products, as well as a listing of ITIL Processes. The URL for this Web site is <http://h20230.www2.hp.com/sc/solutions/index.jsp>

Contents

Chapter 1: Getting Started with Tracking and Managing IT Demand	6
Introduction to Tracking and Managing IT Demand	6
HP IT Demand Management Solution	6
HP Demand Management Terms and Concepts	7
Demand Disposition	7
Demand Fields and Demand Sets	7
IT Demand Request Types	8
Predefined IT Demand Request Types and Workflows	8
IT Demand Request Type Definitions	9
SLAs	9
HP IT Demand Management Solution Requests	9
Related Information	10
Chapter 2: Interface Options for Managing Demand	11
Menus for Managing IT Demand	11
Understanding IT Demand Management Pages	13
Manage Consolidated Demand Page	13
Schedule Demand Page	15
Analyze Demand by Category Page	16
Managing IT Demand with Preconfigured PPM Dashboard Pages	17
Preconfigured Demand Manager PPM Dashboard Page	17
Preconfigured Team Manager PPM Dashboard Page	19
Portlets for Managing IT Demand	21
Consolidated Demand Portlet	21
Demand List and Request List Portlets	21
Demand by Category Portlet	23
Team Assignment Queue Portlet	23
SLA Exception Roll Up Portlet	25
Chapter 3: Processing IT Demand	27
Analyzing IT Demand	27
Assigning IT Demand	29
Managing Consolidated IT Demand	30

Scheduling and Rejecting IT Demand30

Send Documentation Feedback33

Chapter 1: Getting Started with Tracking and Managing IT Demand

["Introduction to Tracking and Managing IT Demand" below](#)

["HP IT Demand Management Solution" below](#)

["Related Information" on page 10](#)

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 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.

HP IT Demand Management Solution

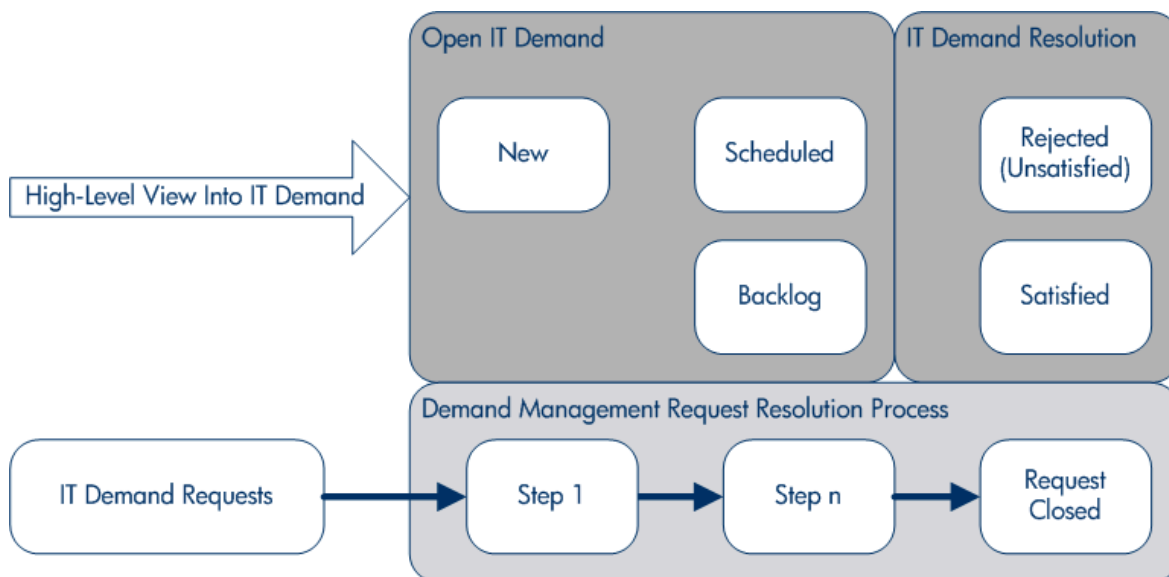
IT groups receive requests for help from many different sources. Some requests are tracked by help desks, defect tracking systems, or service request systems. Other requests are logged in spreadsheets, notes, emails, and voice mailboxes. When requests for help come from a variety of sources, managing those requests can become a challenge. As a result, IT resources can become oversubscribed and IT activities can become misaligned with business requirements.

HP Demand Management provides a single point of contact for all requests placed on an IT group. HP Demand Management consolidates requests from 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 the figure below). 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. Demand on an IT group can be analyzed, managed, assigned to users, scheduled, and rejected.

Note: For more information about HP Demand Management tools, see ["Interface Options for Managing Demand" on page 11](#) and ["Processing IT Demand" on page 27](#).

Figure 1-1. IT Demand Management Process



HP Demand Management Terms and Concepts

The following sections define terms and concepts associated with HP Demand Management:

Demand Disposition

Demand disposition refers to the current status of IT demand expressed as the status of requests. Generally, the status of requests is one of the following:

- New
- Scheduled
- Backlog

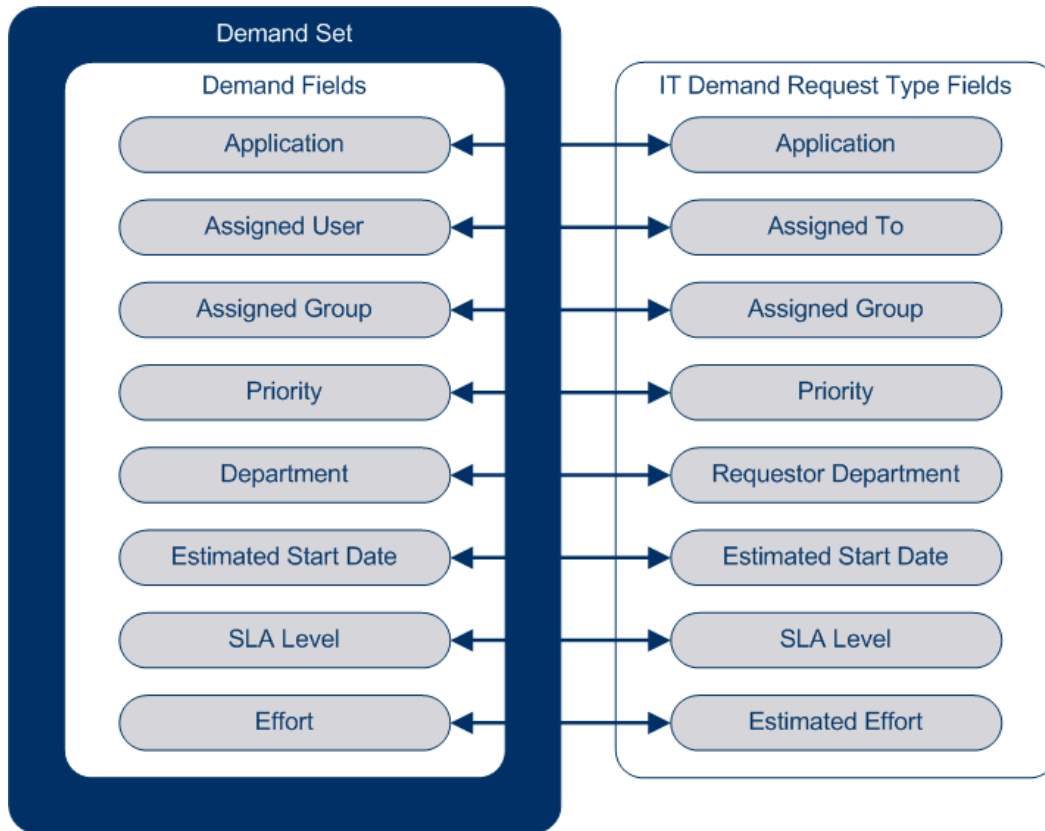
Demand Fields and Demand Sets

Different groups within a company might need to track different sets of IT demand. For example, the R&D department might need to track the IT demand from product defect and enhancement requests. The IS department might need to track IT demand from help desk requests. To enable this categorization and 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 requirements. 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 the figure below).

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 an easy way to visualize and track IT demand by request type.

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. 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 provides an HP-supplied IT demand request specifically for database refreshes (DEM - Database Refresh). When you create a new IT demand request type, that new type of IT Demand can be tracked and managed.

Predefined IT Demand Request Types and Workflows

The HP IT Demand Management solution includes four predefined IT demand request types. Each predefined IT demand request type corresponds to a predefined IT demand workflow. The following table 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

IT Demand Request Type Definitions

IT demand request type definitions control much of the request-specific logic of the tracking and managing process. Definitions control the following items and processes:

- 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

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 a typical request resolution system, when a person has

a requirement, that person creates a request. When the HP IT Demand Management solution is in place, requests will additionally include scheduling and SLA fields to increase the effectiveness of the requests. Request management includes activities such as the printing, canceling, reopening, deleting, and purging of requests.

For information on how to create and 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:

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

Chapter 2: Interface Options for Managing Demand

"Menus for Managing IT Demand" below

"Understanding IT Demand Management Pages " on page 13

"Manage Consolidated Demand Page" on page 13

"Managing IT Demand with Preconfigured PPM Dashboard Pages" on page 17

"Portlets for Managing IT Demand" on page 21

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 **Open > Demand Management** menu as well as the **Demand Sets & Processes** submenu of the **Open > 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 (below) defines the demand-related components of the **Open > Demand Management** menu and the **Open > Administration > Demand Sets & Processes** menu.

Note: These menu items might vary slightly depending on the onsite configuration during installation of the HP IT Demand Management solution.

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

Table 2-1. Default HP 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 " Manage Consolidated Demand Page " on the next page.
	Schedule Demand	Schedules when the IT demand will be fulfilled. You can also select to reject the IT demand. For more information, see " Schedule Demand Page " on page 15.
	Analyze Demand by Category	Analyzes the current IT demand using a set of filters and display parameters. For more information, see " Analyze Demand by Category Page " on page 16.
	Create Requests	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 Saved Searches menu the names of your saved searches, organized under categories as you specified.
Demand Management > Request Browser	Browse Requests	Searches for requests using filter criteria you specify, controls which fields are displayed (in columns) for the search results, and configures the Request Browser Tree groupings. Allows you to save the preference set with a name you specify.

Menu Group	Menu Item	Description
Demand Management > Request Browser > Saved Preference Sets	<Preference_Set_Name>	Displays the specified preference set in the Request Browser Tree. You must save at least one preference set for this menu item to be active.
Administration > Demand Sets & 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

Note: Menu items in the **Open > 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.

Manage Consolidated Demand Page

The Manage Consolidated Demand page provides a graphical view of your IT demand by effort (see Figure 2-1 below, 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 then specifying a grouping.

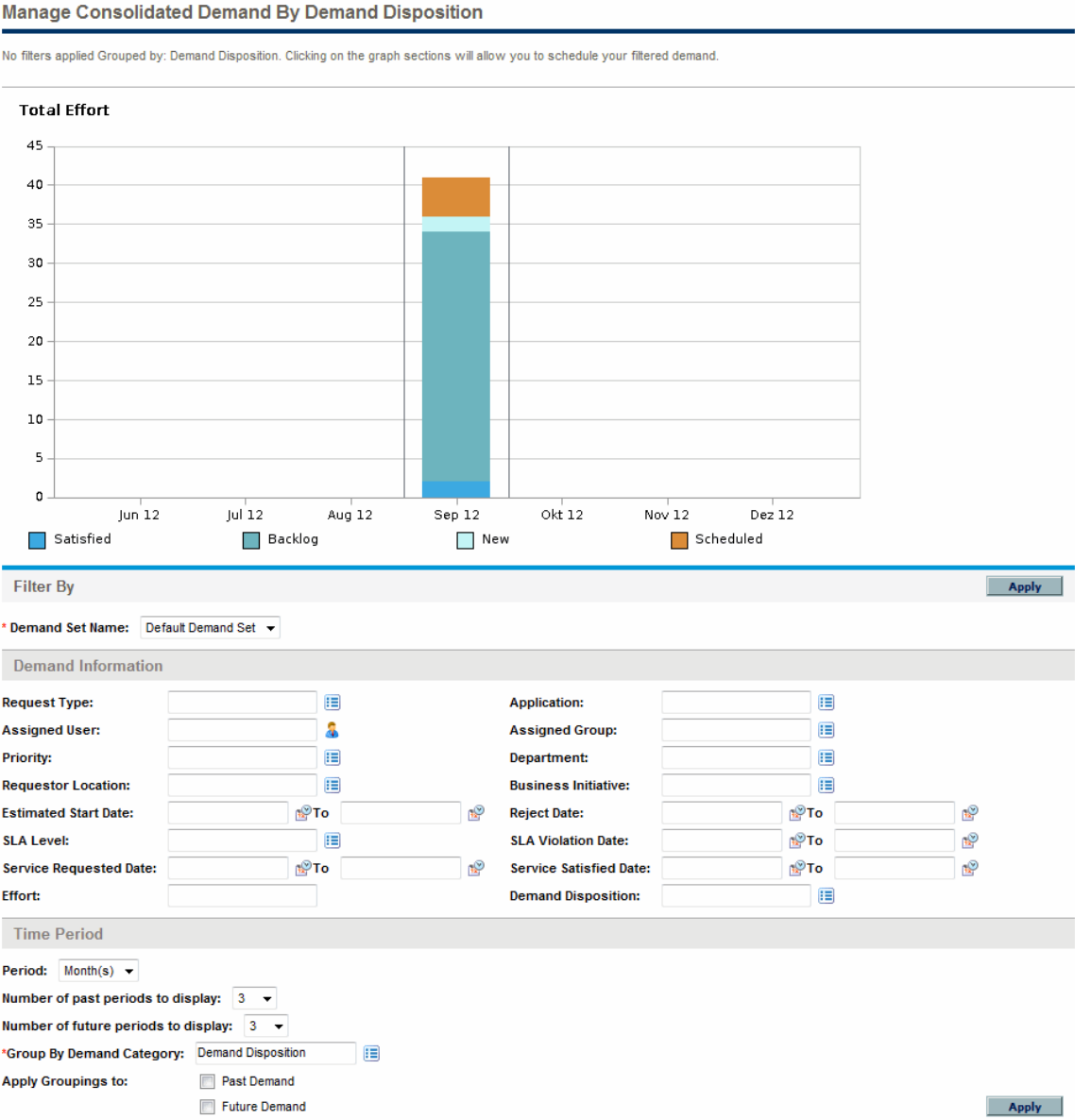
To open this page from the menu bar, select **Open > Demand Management > Manage Consolidated Demand**.

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, for example by assigned user or by department.

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

Figure 2-1. Example Manage Consolidated Demand page



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 **Open > 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 by the selected demand category.

For example, if you click the **New** segment of the stacked bar for Sep 12 in Figure 2-1 (see the chart legend on the "Manage Consolidated Demand Page" on page 13 page), the Schedule Demand page shown in the figure below 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. Done

Demand to be Scheduled

Current Demand	Effort	Count
<input type="checkbox"/> New	17	4
Totals	17	4

Set estimated start for selected demand:

Choose not to satisfy this demand:

Filter By Apply

* 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" value="New"/>	
<input type="radio"/> Scheduled demand starting in: <input type="text" value="Month of 8/1/12"/>	
* Group By Demand Category: <input type="text" value="Demand Disposition"/>	

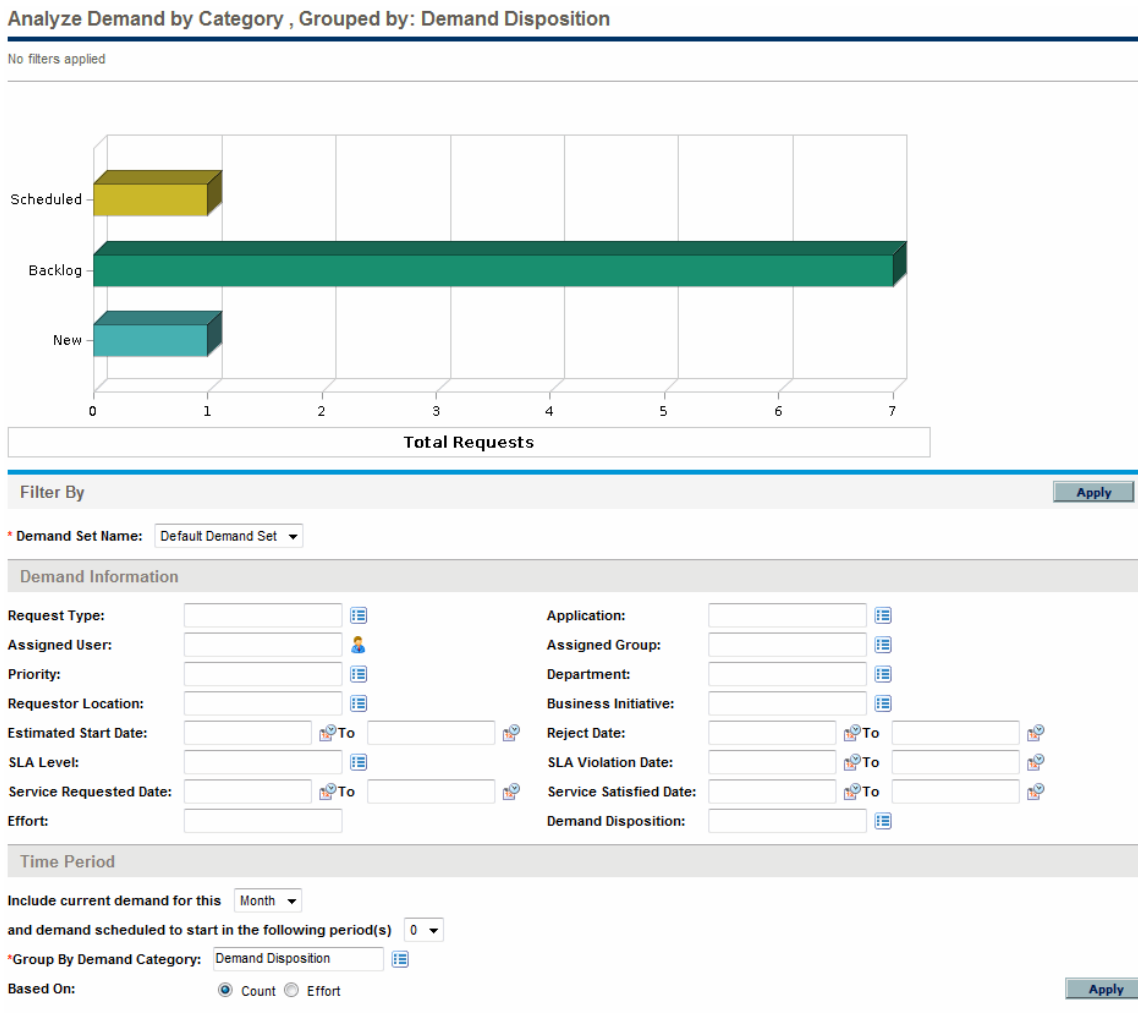
Done

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 **Open > 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 by the selected demand category, and then click **Apply**.

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

Figure 2-3. Analyze Demand by Category page



Managing IT Demand with Preconfigured PPM Dashboard Pages

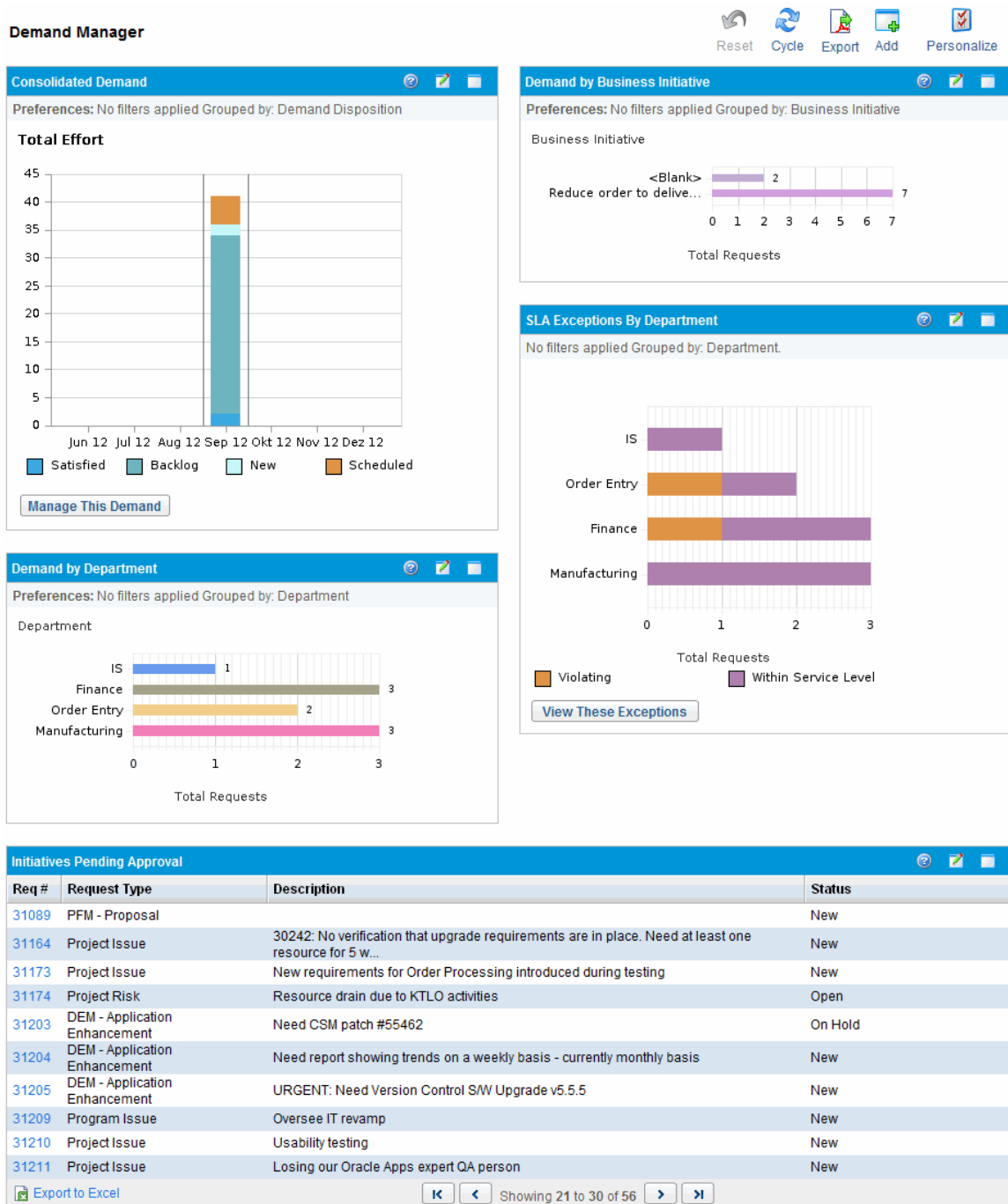
The HP IT Demand Management solution provides preconfigured PPM Dashboard pages to manage your IT demand. These can consist of one or more PPM Dashboard pages, each with a set of configured IT demand portlets. Adding these IT demand PPM Dashboard pages to your PPM Dashboard requires the correct access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

Preconfigured Demand Manager PPM Dashboard Page

The preconfigured Demand Manager PPM Dashboard page provides an overview of the IT demand placed on an entire organization. IT Demand is displayed in the following portlets (see Figure 2-4 below):

- **Consolidated Demand portlet.** The Consolidated Demand portlet provides a graphical overview of the IT demand placed on your organization. For more information, see .
- **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 .
- **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 IT demand by business initiative. For more information, see .
- **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 .
- **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 and the *HP Demand Management User's Guide*.

Figure 2-4. Demand Manager PPM Dashboard page



Preconfigured Team Manager PPM Dashboard Page

The preconfigured Team Manager PPM Dashboard page provides a view of IT demand components of interest to those managing IT demand. Team IT demand is displayed in the following portlets (see Figure 2-5 below):

- **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 .
- **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 .
- **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 IT demand that has not been assigned to a resource, as well as assigning a resource to an IT demand. For more information, see .
- **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 and the *HP Demand Management User's Guide*.

Figure 2-5. Team Manager PPM Dashboard page

Team Manager

Reset
 Cycle
 Export
 Add
 Personalize

Team SLA Exceptions By Dept

No filters applied Grouped by: Department.

Total Requests

■ Violating ■ Within Service Level

[View These Exceptions](#)

Team Demand by Priority

Preferences: No filters applied Grouped by: Priority

Priority

Total Requests

Team Assignment Queue

No filters applied Demand this month

Req#	Description	Priority	Request Type	Scheduled Start	Estimated Effort	Assign
31383	Add new purchasing codes	Normal	DEM - Application Enhancement		5	<input type="text"/>
31204	Need report showing trends on a weekly basis - currently monthly basis	High	DEM - Application Enhancement	2012-08-1...	5	Banks Joseph
31203	Need CSM patch #55462	Normal	DEM - Application Enhancement	2012-09-0...	5	<input type="text"/>
31552	Financial application bug	Low	DEM - Application Bug		2	<input type="text"/>
31311	Application fails when saving after using new Ops modules	High	DEM - Application Bug		2	holbrook
31205	URGENT: Need Version Control SW Upgrade v5.5.5	Critical	DEM - Application Enhancement	2012-08-1...	5	<input type="text"/>
31305	Add new purchasing codes	Normal	DEM - Application Enhancement		5	holbrook
31306	Add new purchasing codes for KMM subsidiary	Normal	DEM - Application Enhancement		5	holbrook
31314	teste	Low	DEM - Application Enhancement		5	<input type="text"/>

[Assign](#)

⏪ ⏩ Showing 1 to 9 of 9 ⏪ ⏩

In Process Demand

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
31203	DEM - Application Enhancement	Need CSM patch #55462	On Hold		Normal	Admin User
31204	DEM - Application Enhancement	Need report showing trends on a weekly basis - currently monthly basis	New	Joseph Banks	High	Admin User
31205	DEM - Application Enhancement	URGENT: Need Version Control SW Upgrade v5.5.5	New		Critical	Admin User
31552	DEM - Application Bug	Financial application bug	New		Low	Admin User
31311	DEM - Application Bug	Application fails when saving after using new Ops modules	In Further Review	Bridget Holbrook	High	Joseph Banks
31314	DEM - Application Enhancement	teste	New		Low	Admin User
31383	DEM - Application Enhancement	Add new purchasing codes	Pending Functional Spec		Normal	Admin User
31305	DEM - Application Enhancement	Add new purchasing codes	Pending Functional Spec	Bridget Holbrook	Normal	John Groom
31306	DEM - Application Enhancement	Add new purchasing codes for KMM subsidiary	New	Bridget Holbrook	Normal	John Groom

[Export to Excel](#)

⏪ ⏩ Showing 1 to 9 of 9 ⏪ ⏩

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 PPM Dashboard pages. 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 in ["Preconfigured Team Manager PPM Dashboard Page" on page 19](#), the request details appear as in Figure 2-6 in .

Note: 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.

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 in ["Preconfigured Demand Manager PPM Dashboard Page " on page 17](#) 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 to control how the information is organized. For example, you can group IT demand data by assigned user or by department.

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 in ["Preconfigured Demand Manager PPM Dashboard Page " on page 17](#)).
 - The In Process Demand portlet on the preconfigured Team Manager page (see Figure 2-5 in ["Preconfigured Team Manager PPM Dashboard Page" on page 19](#)).

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

DEM - Application Enhancement 31203 - Need CSM patch #55462
Status: On Hold

On Hold
Save Copy More

Assign Cancel

Expand All | Collapse All

Summary

Request No.: 31203	Requested By: Admin User
Request Type: DEM - Application Enhancement Change	Created On: August 14, 2012
Request Status: On Hold	
Workflow: DEM - Enhancement Request Process	
Assigned To:	
Assigned Group:	
Requestor Department: Order Entry	
Priority: Normal	Application: CSM App
Description: Need CSM patch #55462	

Enhancement Details

Enhancement Name:
CSM patch #55462

Detailed Description:
Need CSM patch #55462

New Enhancement: Yes No **Suite:**

Requested By:
August 14, 2012

Requestor Location: **Business Initiative:**
Reduce order to delivery time

Analysis

Estimated Completion Date:

Demand Management SLA Fields

SLA Level:
 [icon]

SLA Violation Date:
 [icon]

Service Requested Date:
 [icon]

Service Satisfied Date:
 [icon]

Demand Management Scheduling Fields

Estimated Start Date:
 [icon]

Estimated Effort:
5

Reject Date:
 [icon]

Demand Satisfied Date:
 [icon]

Notes

Add notes

Notes to be added on save:

Status

References

Demand by Category Portlet

The Demand by Category portlet can appear on the dashboard in the following forms, depending on the requirements of your organization:

- **Demand by Department** portlet and the Demand by Business Initiative portlet on the preconfigured Demand Manager page (see Figure 2-4 in ["Preconfigured Demand Manager PPM Dashboard Page" on page 17](#)).
- **Team Demand by Priority** portlet on the preconfigured Team Manager page (see Figure 2-5 in ["Preconfigured Team Manager PPM Dashboard Page" on page 19](#)).

The Demand by Category portlets display 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 PPM Dashboard pages shown in Figure 2-4 in ["Preconfigured Demand Manager PPM Dashboard Page" on page 17](#) and Figure 2-5 in ["Preconfigured Team Manager PPM Dashboard Page" on page 19](#), click **Change Title** on the Edit Preferences page for the portlet.

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 29](#).

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

DEM - Application Enhancement 31204 - Need report showing trends on a weekly basis - currently monthly basis Status: **New**

Initial Review

Resolution Provid... Assign More Info Required Schedule Reject Save Copy More

Expand All | Collapse All

Summary

Request No.: 31204 **Requested By:** Admin User

Request Type: DEM - Application Enhancement **Created On:** August 14, 2012

Request Status: New

Workflow: DEM - Enhancement Request Process

Assigned To: Banks Joseph

Assigned Group:

Requestor Department: Order Entry

Priority: High **Application:** Other

Description: Need report showing trends on a weekly basis - currently monthly basis

Enhancement Details

Enhancement Name: Report Upgrade - Weekly Trends

Detailed Description: Need report showing trends on a weekly basis - currently monthly basis

New Enhancement: Yes No **Suite:**

Requested By: August 30, 2012

Requestor Location: **Business Initiative:** Reduce order to delivery time

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: August 14, 2012

Estimated Effort: 5

Reject Date:

Demand Satisfied Date:

+ Notes No Notes Exist

+ Status

+ References

SLA Exception Roll Up Portlet

The SLA Exception Roll Up portlet can appear on the dashboard in the following forms, depending on the requirements of your organization:

- **SLA Exceptions By Department** portlet on the preconfigured Demand Manager page (see Figure 2-4 in "[Preconfigured Demand Manager PPM Dashboard Page](#)" on page 17).
- **Team SLA Exceptions By Dept** portlet on the preconfigured Team Manager page (see Figure 2-5 in "[Preconfigured Team Manager PPM Dashboard Page](#)" on page 19).

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.

If you click **View These Exceptions** on either portlet, the SLA Exceptions page appears, as shown in the figure below.

Figure 2-8. Example SLA Exceptions page

SLA Exception List				
Filtered by: Department - Finance. Ordered by: Request #.				
Req# [△]	Request Type	Priority	Reason	Description
31205	DEM - Application Enhancement	Critical	Critical - 3 Days	URGENT: Need Version Control S/W 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 the figure below.

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

DEM - Application Enhancement 31205 - URGENT: Need Version Control S/W Upgrade v5.5.5 Status: **New**

Initial Review

Resolution Provid... Assign More Info Required Schedule Reject Save Copy More

Expand All | Collapse All

- Summary

Request No.: 31205	Requested By: Admin User
Request Type: DEM - Application Enhancement <input type="button" value="Change"/>	Created On: August 14, 2012
Request Status: New	
Workflow: DEM - Enhancement Request Process	
Assigned To: <input type="text"/>	
Assigned Group: <input type="text"/>	
Requestor Department: Finance	
Priority: Critical	Application: Version Control App
Description: URGENT: Need Version Control S/W Upgrade v5.5.5	

- 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:**

Requested By:
August 14, 2012 **Business Initiative:**
Reduce order to delivery time

Requestor Location:

- Analysis

Estimated Completion Date:

- Demand Management SLA Fields

SLA Level:
Critical - 3 Days

SLA Violation Date:
August 14, 2012

Service Requested Date:
August 14, 2012

Service Satisfied Date:

- Demand Management Scheduling Fields

Estimated Start Date:
August 14, 2012

Estimated Effort:
5

Reject Date:

Demand Satisfied Date:

+ Notes No Notes Exist

+ Status

+ References

Chapter 3: Processing IT Demand

The HP IT Demand Management solution provides specific demand task-oriented pages to process IT demand. By using the HP IT Demand Management solution pages, you can perform the following processes:

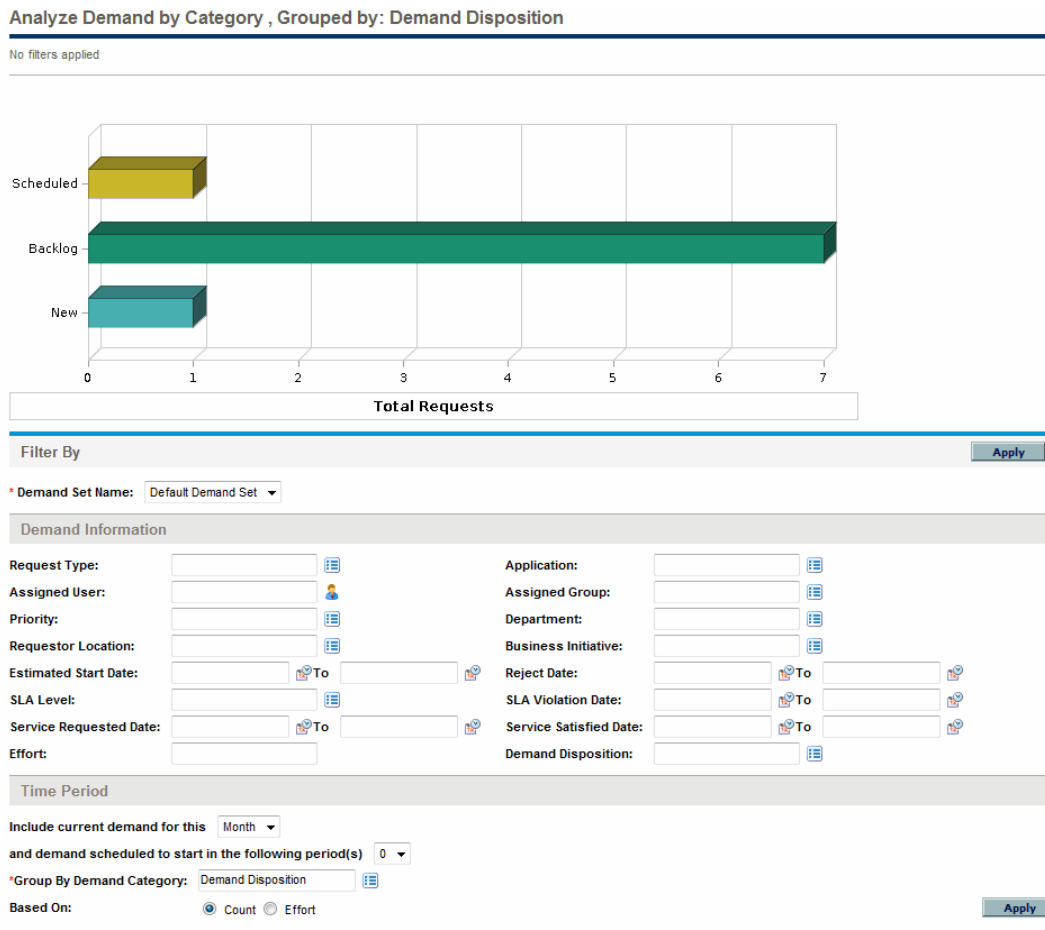
- ["Analyzing IT Demand" below](#)
- ["Assigning IT Demand" on page 29](#)
- ["Managing Consolidated IT Demand" on page 30](#)
- ["Scheduling and Rejecting IT Demand" on page 30](#)

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.

To analyze IT demand:

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

Note: 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 by using the Team Assignment Queue portlet on the preconfigured Team Manager PPM 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 PPM Dashboard page and see the Team Assignment Queue portlet, or open the Assignment Queue portlet.

Team Assignment Queue						
No filters applied Demand this month						
Req#	Description	Priority	Request Type	Scheduled Start	Estimated Effort	Assign
31383	Add new purchasing codes	Normal	DEM - Application Enhancement		5	<input type="text"/>
31204	Need report showing trends on a weekly basis - currently monthly basis	High	DEM - Application Enhancement	2012-08-1...	5	Banks Joseph
31203	Need CSM patch #55462	Normal	DEM - Application Enhancement	2012-09-0...	5	<input type="text"/>
31552	Financial application bug	Low	DEM - Application Bug		2	<input type="text"/>
31311	Application fails when saving after using new Ops modules	High	DEM - Application Bug		2	holbrook
31205	URGENT: Need Version Control S/W Upgrade v5.5.5	Critical	DEM - Application Enhancement	2012-08-1...	5	<input type="text"/>
31305	Add new purchasing codes	Normal	DEM - Application Enhancement		5	holbrook
31306	Add new purchasing codes for KMM subsidiary	Normal	DEM - Application Enhancement		5	holbrook
31314	teste	Low	DEM - Application Enhancement		5	<input type="text"/>

Showing 1 to 9 of 9

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.

Managing Consolidated IT Demand

You can configure the Manage Consolidated Demand page to display a range of data related to IT demand. 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 **Open > Demand Management > Manage Consolidated Demand**. The Manage Consolidated Demand page opens.
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.

Note: For more information on how to schedule and reject IT demand, see "[Scheduling and Rejecting IT Demand](#)" below.

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 portion of the IT demand.

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 by 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 **Open > Demand Management > Schedule Demand**. The Schedule

Demand page opens.

Schedule Demand

No filters applied Grouped by: Demand Disposition.

Done

Demand to be Scheduled

Current Demand	Effort	Count
<input type="checkbox"/> Backlog	32	7
<input type="checkbox"/> New	2	1
<input type="checkbox"/> Scheduled	5	1
Totals	39	9

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:	<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:	Month(s) ▾		

Show:

Current demand by demand disposition:

Scheduled demand starting in: Month of 01.09.12 ▾

*Group By Demand Category: Demand Disposition **Apply**

Done

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

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

- (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: Request #.

Request #A	Description	Request Type	Estimated Effort	Scheduled Start	Demand disposition	Application	Assigned User	Assigned Group	Priority	Department	Requestor Location	Business Initiative
<input type="checkbox"/> 31305	Add new purchasing codes	DEM - Application Enhancement	5.0		New	ERP Application	holbrook		Normal	Manufacturing		Reduce order to delivery time
<input type="checkbox"/> 31306	Add new purchasing codes fo...	DEM - Application Enhancement	5.0		New	ERP Application	holbrook		Normal	Manufacturing		Reduce order to delivery time
<input type="checkbox"/> 31311	Application fails when savi...	DEM - Application Bug	2.0		New	Version Control App	holbrook		High	Finance		
<input type="checkbox"/> 31314	teste	DEM - Application Enhancement	5.0		New	CSM App			Low	Finance		Reduce order to delivery time

Check All **Clear All**

Set estimated start for selected demand: 

Choose not to satisfy this demand:

6. Click the checkboxes next to the particular IT demands that are to be collectively scheduled or collectively rejected.
7. 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**.

Send Documentation Feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on Tracking and Managing IT Demand User's Guide (Project and Portfolio Management Center 9.30)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to HPSW-BTO-PPM-SHIE@hp.com.

We appreciate your feedback!