



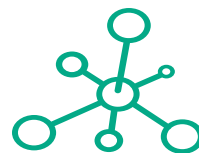
Project and Portfolio Management Center

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Demand Management User's Guide

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Chapter 1: Getting Started with Demand Management

- ["Introduction to Demand Management" below](#)
- ["Overview of an Demand Management System" on the next page](#)
- ["Working with Demand Management on a Multilingual PPM Center Instance" on page 11](#)
- ["Related Documents" on page 11](#)

Introduction to Demand Management

Demand Management is the component of Project and Portfolio Management Center (PPM Center) that manages requests from creation to implementation. Each request is processed using a workflow that is represented graphically in the user interface. Demand Management features tools and configurable processes for dealing with these requests. Data is captured by prompting for process-specific information to ensure that the required information is collected and validated at the right time in the process.

Demand Management can follow complex business rules by using different approval methods. Email and pager notifications can be generated as the request passes through the various workflow steps. Prioritization and delegation features allow requests to efficiently advance through the workflows applied to them, routing them to the relevant department, group, or individual.

This document contains the following information:

- In Demand Management, requests are the means by which actions and processes are initiated and driven. Requests contain all of the information required to take a series of actions that move requests through a workflow. ["Viewing Requests" on page 40](#) presents information about the major features of Demand Management requests.
- You can use Demand Management to submit several different types of requests, from simple software defect requests to project scope change requests. ["Creating Requests" on page 13](#) provides details on how to create these.
- After you create a request, you process and manage it. ["Processing and Managing Requests" on page 66](#) provides instructions on how to open and update requests, and how to use reports and portlets to manage them.

- HPE customers who have both Demand Management and Project Management can integrate Demand Management's request tracking capability with Project Management's deliverable date and actuals tracking capabilities. ["Integrating Requests and Projects" on page 97](#) presents information on how to integrate and work with tasks and requests.
- Demand Management supplies a preconfigured page that demand managers can use to monitor and manage requests. ["Demand Manager Page" on page 100](#) provides descriptions of this page and the portlets it displays.

Overview of an Demand Management System

An Demand Management request resolution system is used to track requests from their creation to their resolution. The main components of a request resolution system are requests and workflows.

Requests are the fundamental work unit in Demand Management. When you ask for help, you create a request. When you report a problem, you create a request. When something needs to happen, you create a request.

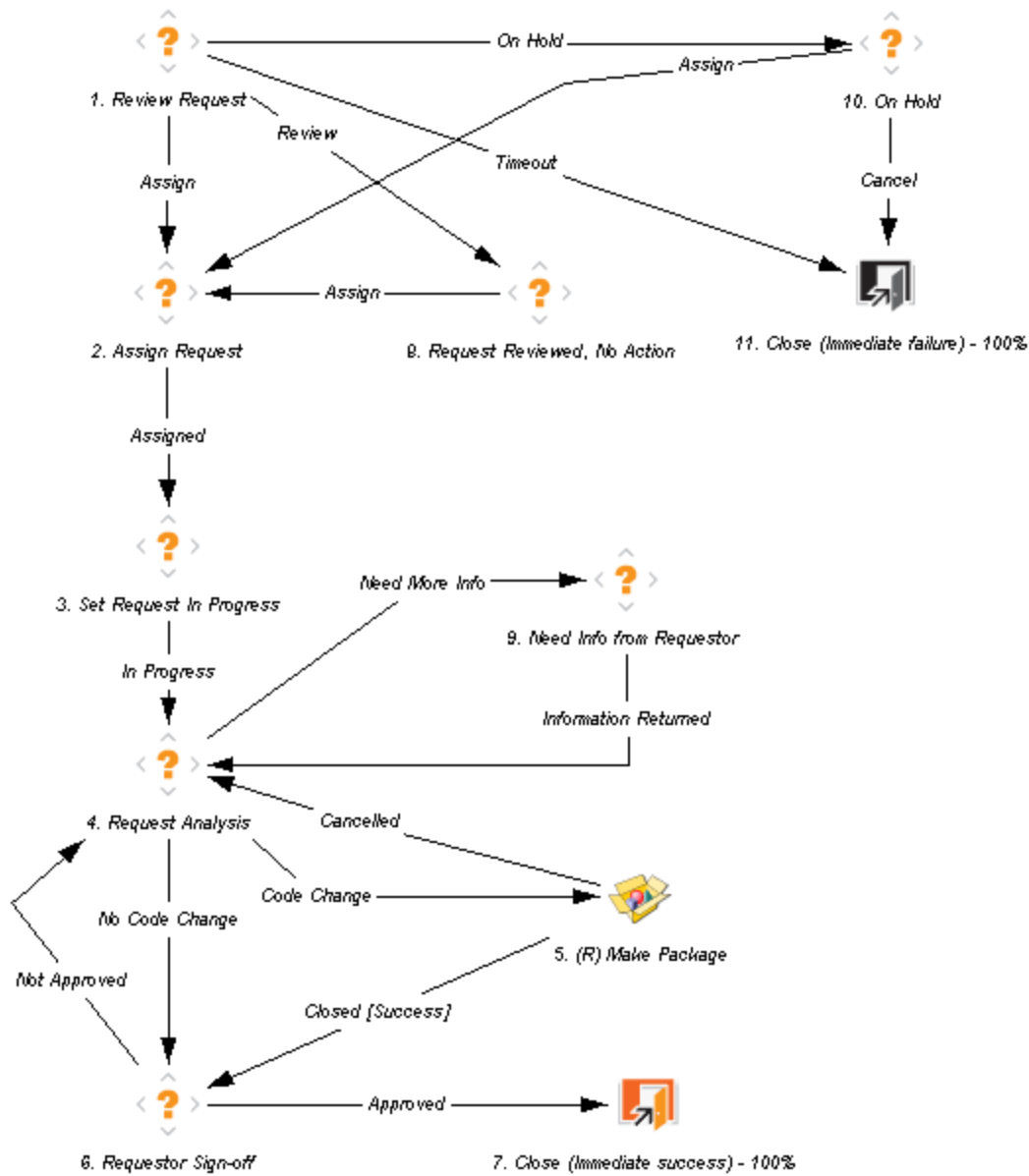
After you create a request, it must follow a process to reach its conclusion. A workflow is the process a request takes to reach its conclusion. Workflows consist of workflow steps, and each workflow step corresponds to a decision or action.

At each workflow step, information can be added to the request or existing information can be updated. For example, you might create an enhancement request to ask for a change to an application. Later in the request resolution process, after the enhancement request is approved, developers are assigned to work on the enhancement.

In PPM Center, you interact with the request through the request detail page. The detail page displays all of the information about the request. This is where you make decisions about and act on the request.

After the decision is made or the action completed, the user must manually access the request detail page and select the decision or action. The request then advances to the next step in the workflow, at which another user makes a decision or takes an appropriate action. [Figure 1-1](#) illustrates the workflow steps for a sample request.

Figure 1-1. Requests and workflows



Requests, Request Types, and Request Status

The request detail page displays all of the information required to complete a specific business process. Each request has an associated *request type*, such as the Bug request type or the

Enhancement request type. The request type determines the basic features of the request, such as the fields it includes, its participants, and the workflow it follows.

Request *status* is a summary indicator of the current state of a request. For example, a request can have a request status of New, Assigned, or In Progress. Request status is assigned automatically as the request moves through its workflow. Demand Management comes with HPE-supplied request types that you can modify to meet your business needs.

Workflows and Workflow Steps

A workflow consists of a logical series of steps that define a process from beginning to end. You can configure a workflow to handle virtually any business process. You can create workflows to automate existing processes, rather than forcing your organization to adopt a fixed set of processes.

Workflow steps are the events that are linked together to form a complete workflow. Demand Management uses the following four types of workflow steps:

- **Decisions.** In decision workflow steps, a user or group must make a decision or take some action, such as approve a request or complete a task. A decision workflow step is manually updated to indicate that the resource made the decision or performed the action appropriate at that step.
- **Executions.** In execution workflow steps, the system performs an action, and then updates the workflow step with the results. An execution can be as simple as calculating the value for a token or as complex as creating packages or updating Web pages. Execution workflow steps are automatically updated to reflect the outcome of the action.
- **Conditions.** Condition workflow steps are logic steps, and can include AND/OR statements. Condition workflow steps are used for complex workflow processing, such as requiring that all inputs reach a workflow step before the process can continue to the next step.
- **Subworkflows.** Subworkflow workflow steps are small, self-contained workflows used by the workflow associated with the request.

Request Processing and Data Integrity

Information gathered during request resolution is often required to move a request through its workflow. While some of the information related to a request is available when the request is created, additional information is acquired at different points along the workflow.

To acquire information when it is required at different workflow steps, Demand Management uses conditional field behavior. Suppose, for example, that you enter a new request. At the outset, a field such as **Assigned To** is not required, and might even be disabled.

At some point in the workflow, however, a user must be assigned to the request. At that workflow step, the user or group working on the problem might be required to fill in the **Assigned To** field. The (now required) field is tagged with a red asterisk to indicate that the request cannot go to the next workflow step until a user is assigned. In fact, the request cannot be saved unless the **Assigned To** field is completed.

Working with Demand Management on a Multilingual PPM Center Instance

If your PPM Center supports multiple languages, make sure that you understand how this affects the Demand Management entities (request types, request header types, notifications, workflows, requests, and so on) that you create or modify.

If you work with Demand Management on a PPM Center instance that has a multilingual user interface (MLU), consider the following:

- Any entity you create is defined in the language you selected at logon (your *session language*). After you create the entity, it can be modified only in its definition language.
- If an entity is defined in a language other than your session language, you cannot edit the entity unless you first change its definition language.
- If you copy an entity from the PPM Workbench, and the entity is defined in a language other than your session language, you can copy existing translations for that entity.
- Notification recipients can see the notifications in their session languages. If a notification recipient's session language is not supported on your PPM Center instance, then the notification's *definition language* is used.

For detailed information about session languages, definition languages, and translating Demand Management entities in a multilingual user interface (MLU), see the *Multilingual User Interface Guide*.

Related Documents

For more information related to Demand Management, see the following documents:

- *Demand Management Configuration Guide*
- *Tracking and Managing IT Demand User's Guide*
- *Tracking and Managing IT Demand Configuration Guide*
- *Multilingual User Interface Guide*
- *Time Management User's Guide*
- *Time Management Configuration Guide*
- *Project Management User's Guide*
- *Reports Guide and Reference*
- *Getting Started*
- *What's New and What's Changed*
- *HPE-Supplied Entities Guide* includes descriptions of all Demand Management portlets, request types, and workflows.

Chapter 2: Creating Requests

- "Overview of Creating Requests " below
- "Creating a Request" on page 15
- "Importing Requests from XML Files" on page 23
- "Assigning Resources to Requests" on page 27
- "Adding References to Requests" on page 30
- "Specifying a Service for a Request" on page 38

Overview of Creating Requests

In Demand Management, requests are the means by which actions and processes are initiated. Requests contain all of the information necessary to take a series of actions and move through a workflow.

The information that a request contains depends on what type of request it is. For example, if you create an enhancement request, the information you provide is different than if you create an application defect request. However, most request types have the same basic organization.

Figure 2-1 shows a request detail page that is minimized to show only the main sections. The following are the main sections on a request detail page:

- The header section contains general information such as the request type, who created the request, and on what date. In this case, the header section contains the **Summary** and the **Work Item Fields** subsections.
- The details section contains information specific to the request, such as a description of the problem, the business area affected, and the resolution of the request. Typically, when creating a request, you'll be required to complete some of the fields in the details section. In this case, subsections of the details section are the remaining sections except **Notes** and **References**.
- The **Notes** section provides fields for entering information about the request that you want to keep. Entering notes is optional.
- Use the **References** section to add and view additional information about the request. For example, you can attach a document or specify a URL as a request reference.

Figure 2-1. Request detail page with some sections minimized

DEM - Application Enhancement 30928 - Add new purchasing codes Status: Pending Functional Spec

Review Application Definition Save Copy More

Completed Need More Info Cancel

Expand All | Collapse All

Summary

Request No.: 30928 **Requested By:** Admin User

Request Type: DEM - Application Enhancement **Created On:** January 10, 2013

Request Status: Pending Functional Spec

Workflow: DEM - Enhancement Request Process

***Assigned To:** Finn Gill

Assigned Group:

Requestor Department: Manufacturing

Priority: Normal **Application:** ERP Application

Description: Add new purchasing codes

+ Work Item Fields

+ Enhancement Details

+ Analysis

+ Demand Management SLA Fields

+ Demand Management Scheduling Fields

+ Notes (No Notes Exist)

Status

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Assign	Admin User	January 10, 2013 09:07:37 AM CST
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design	High Level Design		January 10, 2013 09:07:37 AM CST
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (Immediate success)			
19	Close (Immediate failure)			

+ References

For more information about request detail pages, see "Viewing Requests" on page 40.

Creating a Request

To create requests, you use the Create New Request page, which you can access from the following locations (and which is described in detail in subsequent sections):

- Menu bar
- **References** section on a request detail page
- An Project Management project
- An Project Management task
- An Deployment Management package
- An Deployment Management release

For information about how to create a request from Project Management, see "[Integrating Requests and Projects](#)" on page 97. For information about how to create a request from Deployment Management, see the *Deployment Management User's Guide*.

Creating Requests from the Menu Bar

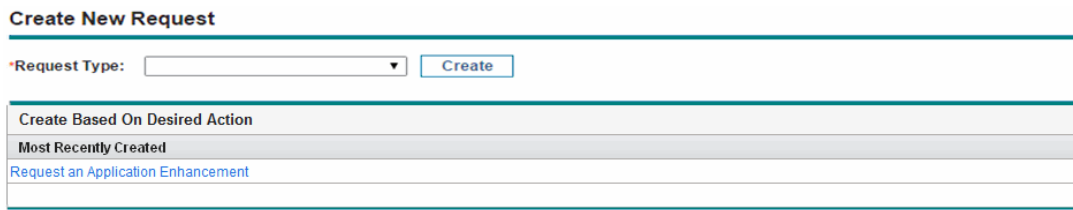
The most common way to create a request is by using the menu bar. After you create a request, it is automatically assigned a unique number and then tracked from start to finish. This ensures task completion and accountability for all steps within the request's workflow.

Caution: If your PPM Center instance supports multiple languages, note that when you create a new request type, its definition language is automatically set to your current session language. For more information, see the *Multilingual User Interface Guide*.

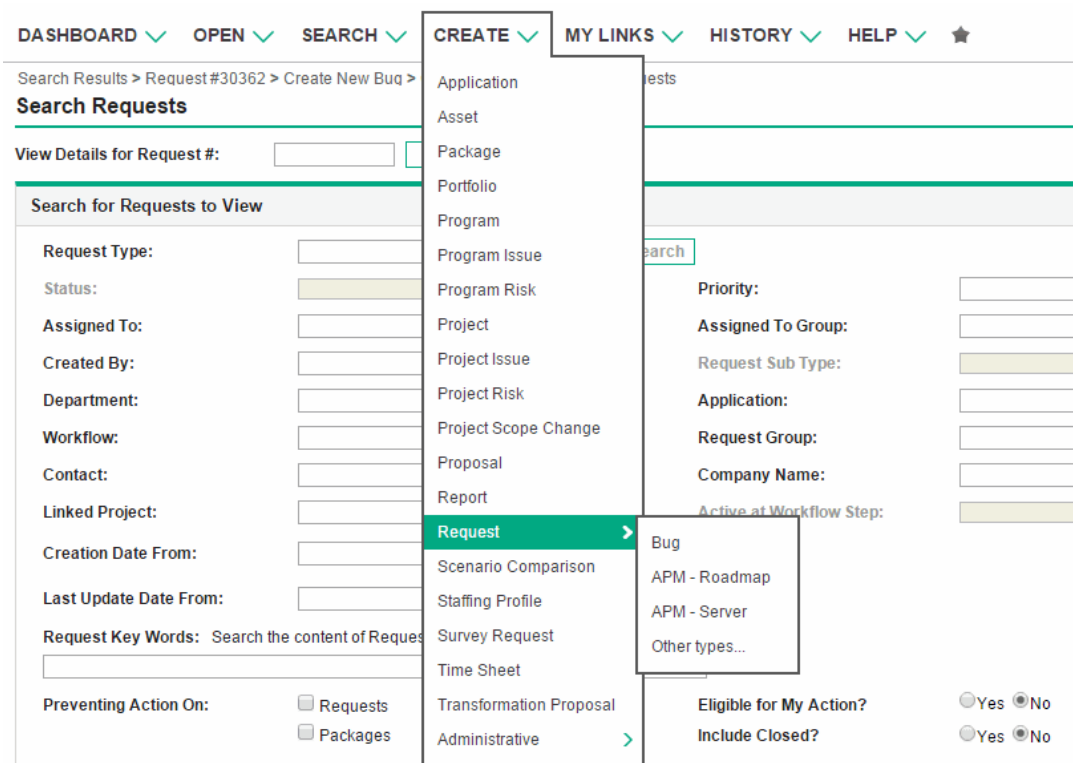
To create a request:

1. Log on to PPM Center.
2. Do one of the following:
 - If it is the first time for you to create a request, on the **Create** menu, click **Request**.

The Create New Request page opens.



- To create a request with a recently used request type, on the **Create** menu, click **Request > <Request Type>**, and skip to **step 5**.



The **Create Request** submenu lists five most recently used request types, corresponding to request types listed in the **Create Based on Desired Action** section of the Create New Request page. If you have deleted all requests of a request type (including closed requests), the request type is removed from the **Create Request** submenu. The **Create Request** submenu disappears when all recently created request types have been removed.

- Otherwise, on the **Create** menu, click **Request > Other types**.

The Create New Request page opens.

- From the **Request Type** list, select the request type to create.

The request type you select depends on your licenses and access grants, and on the security

groups to which you are assigned. To save you time, the **Create Based on Desired Action** section lists the most recently created request types.

4. Click **Create**.

The Create New <Request Type> page opens.

Create New DEM - Application Bug

Submit Cancel

Expand All | Collapse All

- Summary

Requested By:
Bridget Holbrook

Request Status:
Unreleased

Workflow:
DEM - Bug Request Workflow

Assigned To:

Assigned Group:

***Requestor Department:**

***Priority:**

***Application:**

***Description:**

- Problem/Resolution

***Problem:**

***Business Area Affected:**

Source:

Reproducible:
 Yes No

Steps to Reproduce:

Resolution:

Solution:

+ Environment

+ Analysis

+ Project Information

+ Demand Management SLA Fields

+ Demand Management Scheduling Fields

+ Notes

+ References

The sections displayed on the request detail page vary, depending on the request type you selected.

5. In the header section, complete the fields, as required. In this case, the header section contains the **Summary** subsection.

The header section contains fields for entering general information about the request. Required fields are marked with a red asterisk. All other fields are optional, but you can use them to provide information that can be useful to others reviewing the request.

6. In the details section, complete the required fields, and provide any other information about the request that might be useful.

In this case, subsections of the details section are the remaining sections except **Notes** and **References**.

The details section can have none, one, or many subsections. For information about a specific field, click the **Help** icon (if available) next to the field.

7. In the **Notes** section, type additional information about the request that you want to make available to other users.
8. Use the **References** section to add references to the request.

You can reference a Web-accessible file or attach a document or file from your local machine to the current request. You can also reference packages, tasks, and other requests. For more information on how to add references, see ["Adding References to Requests" on page 30](#).

9. Click **Submit**.

The Request Creation Confirmed page opens and displays the number assigned to the new request, and the request description.

Note:

- You can skip the Request Creation Confirmed page if you manually adding the following line into the `server.conf` file:

```
com.kintana.core.server.SKIP_REQUEST_CREATE_CONFIRMATION_PAGE=true
```

If you enable this feature, you can directly go to the Request Details page after clicking **Submit**. And you would find an information box displayed above the Status section on the Request Details page, informing you that your request is created. Clicking the Delete icon closes the box.

However, the option **Finish Execution before displaying the request page to the user** does not work for request creation. Therefore, when you select this option and skip the

request creation confirmation, the request page opens before the execution finishes and the request status may be incorrect.

- PPM Center can be configured to save requests before they are submitted. To have this feature enabled for your site, see your application administrator.

10. To see the generated detail page for a submitted request, click **Request #**.

After you submit a new request, Demand Management assigns it an initial status, such as New, and then routes it along a standard business process of approvals, decisions, and actions, depending on the associated workflow. For more information, see "[Processing and Managing Requests](#)" on page 66.

Creating Requests from the References Section

You can create a request from the **References** section of the detail page for a request.

Caution: If your PPM Center instance supports multiple languages, note that when you create a new request type, its definition language is automatically set to your current session language. For more information, see the *Multilingual User Interface Guide*.

To create a request from the **References** section of a request detail page:

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.
The Search Requests page opens.
3. To locate a request, enter search criteria, and then click **Search**.
4. In the **Request Search Results** section, in the **Req #** column, click a number to open the corresponding request.
The detail page for the request opens.
5. From the **Jump To** navigation panel, click **References**.
6. From the **New Reference** list, select **Request (New)**.
7. Click **Add**.

The Create New Request page opens.

PROJECT AND PORTFOLIO MANAGEMENT CENTER

Create New Request

*Request Type:

*Relationship:

- Duplicate Request - (Informational) - The selected Request is a duplicate of Request 30362
- Original of Duplicate Requests - (Informational) - The selected Request is the Original of these two duplicate Requests
- Parent of this Request - (Informational) - The selected Request is the parent of Request 30362
- Child of this Request - (Informational) - The selected Request is the child of Request 30362
- Related to this Request - (Informational) - The selected Request is related to Request 30362
- Successor - (Blocked) - Action not allowed on selected Request until Request 30362 closes
- Predecessor - (Blocking) - Action not allowed on Request 30362 until the selected Request closes

8. From the **Request Type** list, select the type of request you want to create.
9. Under **Relationship**, select the option that indicates how the new request is related to the request you opened.

Note: For more information about establishing relationships between requests, see ["Adding References to Requests"](#) on page 30.

10. Click **Create**.

The Create New *<Request Type>* page opens.

11. In the fields marked with a red asterisk, provide all required information.
12. Provide any additional information about the request that might be useful.

Note: For instructions on how to complete the Create New *<Request Type>* page, see ["Creating Requests from the Menu Bar"](#) on page 15.

13. Click **Submit**.

Creating Requests by Copying Requests

You can copy an existing request to create a request. This can save your time by eliminating the need to reenter information that is common to both requests.

Caution: If your PPM Center instance supports multiple languages, and you create a request by copying an existing field, keep in mind that the new request you create as a result of the copy

action has its definition language automatically set to your current session language, even if the original entity had a different definition language. For more information, see the *Multilingual User Interface Guide*.

To copy an existing request:

1. Log on to PPM Center.
2. Open a request.

Note: To open a request, see "[Opening and Updating Requests](#)" on page 73

The detail page for the request opens.

3. In the upper-right corner, click **Copy**.

The Copy Request page opens.

4. To add the notes associated with the original request to the new request, leave the **Copy Request Notes** checkbox selected.

5. To add the references associated with the original request to the new request, leave the **Copy Request References** checkbox selected.

6. Click **Copy**.

The Create New *<Request Type>* page opens and displays the copied information. The values from all the fields in the header and details sections are replicated in the new request.

7. Modify the field values, as required, and then click **Submit**.

The Request Copy Confirmed page shows that the request was successfully copied.

8. To open the new request or the copied request, click its request number.

Setting Idle Time for Request Details Page

You might spend long time entering data in the Request Details page. However, PPM would regard this as inactivity and then terminate your session. You can use the following parameter to set the duration you can stay idle in this page. This helps prevent data loss because of inactivity.

Parameter	Description, Usage	Values
REQUEST_AND_PROJECT_KEEPLIVE_MAX_IDLE_TIME	You use this parameter to specify the duration (in minutes) that you can stay idle on the Request Details page and	Default value: 600

	Project Details page before your session starts to time out.	Valid value: positive integer
--	--	-------------------------------

The `KINTANA_SESSION_TIMEOUT` parameter, which specifies the time to elapse before a user session times out, still takes effect when you use the above parameter. They work together in the following way:

- When the value of `REQUEST_AND_PROJECT_KEEPALIVE_MAX_IDLE_TIME` is greater than 0, you can stay idle Request Details page for the specified duration. After the duration ends, the session times out when the time specified by `KINTANA_SESSION_TIMEOUT` is up.

In this case, as long as you are not idle in these pages performing actions like clicking the mouse and pressing keys, your session will not time out because PPM keeps the session alive.

- When the value of `REQUEST_AND_PROJECT_KEEPALIVE_MAX_IDLE_TIME` is 0, `KINTANA_SESSION_TIMEOUT` works in the Request Details page as it does in other PPM pages: your session times out if no requests are sent from the browser to the server for a duration equal to or greater than the `KINTANA_SESSION_TIMEOUT` value.

Importing Requests from XML Files

To produce XML files electronically and to complete processes that may require requests in XML version, you can perform the following tasks:

- ["Importing Requests from XML Files" below](#)
- ["Exporting Requests to XML Files in Specific Format" on page 26](#)

Importing Requests from XML Files

You can use menu option **Import Request from XML** to import XML files as requests. The web page takes a XML file as well as the XSLT template as input, and imports the specified XML file to create a new request or update an existing request.

To perform the import task, you must have the Demand Mgmt: Import Request access grant.

Import an XML File to Create a New Request

1. Log on to PPM Center.
2. On the **Open** menu, click **Demand Management > Import Request From XML**.

The Import Request from XML page opens.

Import Request from XML

Select an XML file to import and provide the XSL template to transform the input XML

*XML File to Import: No file chosen

XSL Template:

Create a new request
 Update an existing request

Request id is required when 'Update an existing request' is selected.

Request ID:

3. For **XML File to Import** field, click **Choose File** to locate and select the XML file you want to import.

4. For **XSL Template** field, click the drop-down button to select the XSL template you want to associate with the imported XML file.

XSL templates are configured in PPM Workbench by admin user. For information about configuring XSL templates, see the *Demand Management Configuration Guide*.

5. Select **Create a new request**.
6. (Optional) If it is the first time for you to import an XML file, you may want to run a test before you perform the formal import. In this case, click **Test** button.

It tests if the XML file can be imported successfully.

- If the test result page shows "Test completed successfully", proceed to [step 7](#).
- If "Error parsing the incoming xml file...", troubleshoot the cause and make sure the XML is ready for import.

7. Click **Import** button.
8. Check the import result and the ID of the new request created.

Note: A "Test/Import completed successfully" message will be displayed even when the XML imported does not match the XSL template selected, but no corresponding request ID will be generated and the log will show "pass:0".

9. Click **Back** to return to the Import Request from XML page.

Import an XML File to Update an Existing Request

1. Log on to PPM Center.
2. On the **Open** menu, click **Demand Management > Import Request From XML**.
The Import Request from XML page opens.
3. For **XML File to Import** field, click **Choose File** to locate and select the XML file you want to import.
4. For **XSLT Template** field, click the drop-down button to select the XSLT template you want to associate with the imported XML file.
XSLT templates are configured in PPM Workbench by admin user. For information about configuring XSLT templates, see the *Demand Management Configuration Guide*.
5. Select **Update an existing request**.
This enables **Request ID** field.
6. For **Request ID** field, click the selector icon.
The popup window lists all available choices. Enter search filter(s) to locate the desired request ID or select a value from the list.
7. (Optional) If it is the first time for you to import an XML file, you may want to run a test before you perform the formal import. In this case, click **Test** button.
It tests if the XML file can be imported successfully.
 - If the test result page shows "Test completed successfully", proceed to [step 8](#).
 - If "Error parsing the incoming xml file...", troubleshoot the cause and make sure the XML is ready for import.
8. Click **Import** button.
9. Check the import result and the ID of the new request created.

Note: A "Test/Import completed successfully" message will be displayed even when the XML imported does not match the XSL template selected, but no corresponding request ID will be generated and the log will show "pass:0".

10. Click **Back** to return to the Import Request from XML page.

Exporting Requests to XML Files in Specific Format

To create a report and export a request to XML in specific format,

1. Log on to PPM Center.
2. On the **Open** menu, click **Reports > Create Report**.

The Submit New Report page opens.

3. From the **Select Report by Category** section:
 - a. For **Report Category**, select Demand Management.
 - b. Click Export Request Report.

The Submit Report: Export Request Report window opens.

4. Under the **Report Parameters** section,
 - a. In the **Request ID** field, specify a request number by using the selector icon.
 - b. In the **Template** field, select a template by using the selector icon.
5. Click **Submit**.

The Submit Report window opens. The status is refreshed until the report is complete.

6. The completed XML report is displayed in a separate window.

```

<?xml version="1.0" encoding="UTF-8" ?>
- <requests xmlns:omb="https://OMB300.gov" date_format="YYYY-MM-DD">
- <request>
  <requestType>Enhancement</requestType>
- <field>
  <token>REQ.CREATED_BY_NAME</token>
- <value>
- <tr>
  - <table>
    - <tr>
      <td>REQ.FIRST_CONSULTANT_NAME</td>
      <td />
    </tr>
    - <tr>
      <td>REQ.TOTAL_EFFORT</td>
      <td>24852</td>
    </tr>
    - <tr>
      <td>REQ.CONTACT_INFO</td>
      <td />
    </tr>
    - <tr>
      <td>REQ.PRODINFO</td>
      <td />
    </tr>
  - <tr>

```

Assigning Resources to Requests

When you create or edit a request, you can manually assign resources to a request from the **Summary** section of the request detail page, or, if your administrator has enabled resource tracking, from the **Resources** section of the page.

Assigning Resources from the Summary Section of the Request Detail Page

To assign an individual resource from the **Summary** section

1. To the right of the **Assigned To** field, click the resource selector icon  .

A search and select window opens.


2. Do one of the following:

- Scroll through the listed resources, and select the resource to assign.
- Alternatively, to restrict the number of resources listed:
 - i. Enter search preferences in any combination of the **Assigned To**, **Department**, **First Name**, and **Last Name** fields.
 - ii. Click **Find**.
 - iii. From the list of resources returned, select a resource name.

The search and select window closes, and the **Assigned To** field displays the selected resource name.

Note: To add the resource, you must save the request or, if this is a new request, submit the request.

To assign multiple resources from the **Summary** section

1. To the right of the **Assigned To** field, click the resources selector icon  .

The Select a Resource to Assign page opens.

2. Use the **Availability within dates** fields to specify the date range during which the resources must be available for assignment.
3. To specify that the resources must have a specific skill:
 - a. Click **AddSkill**.
 - b. Use the auto-complete that becomes available to select a skill.
 - c. In the **Ideal Proficiency** list, select the proficiency level you require of a resource with this skill.
4. To further restrict your resource search results, provide values in the optional fields listed in the following table.

Field	Description
Only show results with a Suitability Score greater than	Specify a number that represents the suitability of the resource for the request, based on role, skills, and availability. The higher the score, the better suited the resource is for assignment to the request. For more information about suitability score, see the Resource Management User's Guide.
Resource Name	Use this auto-complete to select multiple resources by name.

Field	Description
Role	Use this auto-complete to select one or more roles that the resources must assume.
Resource Pool	Use this auto-complete to specify a resource pool to assign to the request.
Organization Unit	Use this auto-complete to select an organization unit to which the resources must belong.
Resource Category	Use this auto-complete to select one or more resource categories to which the resources must belong.
Location	From this list, select the site where the resource must be located.
Department	From this list, select the department to which the resource must belong.

5. Click **Search**.

The **Resource Results** tab lists the resources that meet your search criteria.

6. To view the workloads of listed resources for the date range you specified, select the checkboxes for the resources of interest to you, and then click **View Resource Load**.

The Resource Load Breakdown - Assignment Summary window opens and displays the work allocations for the selected resources over the specified time period.

7. To compare the skills of two or more of the listed resources, select the checkboxes for the resources of interest to you, and then click **Compare Skills**.

The Compare Skills window opens and displays the skills and skill levels for each selected resource.

Note: To add the resource, you must save the request or, if this is a new request, submit the request.

Allocating Resources from the Resources Section of the Request Detail Page

If your administrator has enabled Demand Management's resources tracking functionality, and has given you the required authorization, you can manage resource allocations for a request from the **Resources** section of the request detail page.

To allocate a resource to a request from the **Resources** section:

1. On the request detail page, expand the **Resources** section.
2. Click **Add Resource**.

A search and select window opens.

3. Do one of the following:
 - o Scroll through the listed resources, and select the resource to assign.
 - o Alternatively, to restrict the number of resources listed:
 - i. Enter search preferences in any combination of the **Assigned To**, **Department**, **First Name**, and **Last Name** fields.
 - ii. Click **Find**.
 - iii. From the list of resources returned, select a resource name.

The search and select window closes, and the **Resources** section displays the selected resource name.

4. To commit the resource(s) you just added, do one of the following:
 - o If this is a new request, click **Submit**.
 - o Otherwise, click **Save**.

Adding References to Requests

You can use the **References** section on the request detail page to add (and view) supplementary information related to the request. For example, you can add a document or the URL for a Web page that provides more information about the request.

You can associate the following reference types with a request:

- Attachments
- Packages (new and existing)
- Other programs
- Projects
- Releases
- Requests (new and existing)

- Tasks
- URLs

For some references, such as packages and other requests, you can establish a functional dependency to the original request. For example, you can specify that a request is a predecessor to the package so that the package cannot continue along its workflow until the request is closed. For a list of the references and their possible dependency relationships, see "[Request Detail Page, References Section](#)" on page 60.

Adding Attachments as References to a Request

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Attachment**.
5. Click **Add**.

The Add Document window opens.

6. In the **File** field, type the name of the document file to attach as a reference.

Caution: The name of the file you attach must not contain an apostrophe. If it does, a script error will occur the next time the request is opened.

7. In the **Author** field, you can replace your name with the name of the attachment author.
8. In the **Description** field, you can type a description of the attachment.
9. Click **Add**.

On the request detail page, the **References to be added on Save** field lists the referenced attachment.

10. Click **Save**.

Caution: To add the attachment as a reference, you must save the request.

Adding Existing Packages as References to a Request

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Package (Existing)**.
5. Click **Add**.

The Add Reference: Package window opens.

6. Enter your search criteria in the available fields.
7. Click **Search**.

The **Package Search Results** section lists the packages that match your search criteria. The section also includes a list of relationship types.

8. Under **Select which relationship the selected packages will have to Request # <request number>**, click the option that describes the relationship between the request and the package.
9. In the **Package Search Results** section, select the checkbox(es) next to the name(s) of the package(s) to add.
10. Click **Add**.

On the request detail page, the **References to be added on Save** field displays the package name and its relationship to the request.

11. Click **Save**.

The **Packages** subsection of the **References** section now lists the referenced package.

Caution: To add the package as a reference, you must save the request.

Adding New Packages as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Package (New)**.
5. Click **Add**.

The Create New Package window opens.

6. Under **Relationship**, select the option that describes the relationship between the new package and the open request.
7. Click **Create**.

The New Package window opens. Any matching header information from the request (such as description, priority, and package type) is automatically added to the package.

8. Provide all required information, and any optional package information you want to make available, and then click **Save**.

On the request detail page, the **References to be added on Save** field lists the new package name.

9. Click **Save**.

Caution: To add the package as a reference, you must save the request.

Adding Programs as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Program**.
5. Click **Add**.

The Reference Program window opens.

6. In the **Program** field, type the name of the program you are adding as a request reference.
7. Under **Relationship**, select the option that describes how the program is related to the request.
8. Click **Add**.

On the request detail page, the **References to be added on Save** field lists the program name and displays its relationship to the request.

9. Click **Save**.

Caution: To add the program as a reference, you must save the request.

Adding Projects as References

1. Log on to PPM Center.
2. Open or create a request.
3. In the request detail page, expand the **References** section.
4. From the **New Reference** list, select **Project**.
5. Click **Add**.

The Add Reference: Project window opens.

6. Provide the required information, and any optional information you want to record, and then click **Search**.

The Add Reference: Project window lists relationship types and the projects that match your search criteria.

7. Under **Select which relationship the selected Projects will have to Request # <request number>**, select the option that describes how the project(s) is related to the request.
8. In the **Select Project to View** section, select the checkbox(es) for the project(s) you want to add as a reference to the request.
9. Click **Add**.

On the request detail page, the **References to be added on Save** field lists the project name and displays its relationship to the request.

10. Click **Save**.

Note: To add a reference, you must save or submit the request.

The detail page for the request now lists the selected project(s).

Adding Releases as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Release**.
5. Click **Add**.

The Reference Release window opens.

6. In the **Release** field, type the release version.
7. Under **Relationship**, select the option that describes the relationship that the release has to the open request.
8. Click **Add**.

On the request detail page, the **References to be added on Save** field lists the release name and displays its relationship to the request.

9. Click **Save**.

Note: To add the release as a reference, you must save the request.

Adding Existing Requests as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Request (Existing)**.

5. Click **Add**.

The Add Reference: Request window opens.

6. To locate the request to reference to the open request, enter your search criteria, and then click **Search**.

The Add Reference: Request window lists the possible relationship types. The **Request Search Results** section lists the requests that match your search criteria.

7. Under **Select which relationship the selected Requests will have to Request # <request number>**, select the option that describes how the request you are about to select is related to the open request.

8. In the **Request Search Results** section, select the checkbox(es) for the request(s) you want to add.

9. Click **Add**.

On the detail page for the request, the **References to be added on Save** field lists the selected request(s).

10. Click **Save**.

Note: To add the reference, you must save the open request.

In the **References** section of the request detail page, the **Requests** subsection lists the referenced request(s).

Adding New Requests as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Request (New)**.
5. Click **Add**.

The Create New Request window opens.

6. From the **Request Type** list, select the type of request you want to create.
7. Under **Relationship**, select the option that describes how the new request is related to the open

request.

8. Click **Create**.

The Create New <Request Type> window displays the fields available for the selected request type.

9. Provide information for all required fields, and any optional information you want to record.

10. Click **Submit**.

On the detail page for the original (open) request, the **References to be added on Save** field lists the selected request.

11. Click **Save**.

In the **References** section of the request detail page, the **Requests** subsection lists the new request you added.

Adding Tasks as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **Task**.
5. Click **Add**.

The Add Reference: Task window opens.

6. Using the fields provided, enter your search criteria.
7. Click **Search**.

The Add Reference: Task window lists the tasks that match your search criteria.

Note: "Related to this Task" is the only relationship that can exist between requests and tasks.

8. In the **Select Task to View** section, select the checkboxes for the tasks that you want to add as references to the open request.
9. Click **Add**.

On the detail page for the request, the **References to be added on Save** field now list the selected task(s).

10. Click **Save**.

In the **References** section of the request detail page, the **Tasks** section lists the task(s) you added.

Adding URLs as References

1. Log on to PPM Center.
2. Open or create a request.
3. From the **Jump To** navigation panel, click **References**.
4. From the **New Reference** list, select **URL**.
5. Click **Add**.

The Reference URL window opens.

6. In the **URL** field, type the URL address.
7. To test the URL, click **View URL**.
8. In the **Description** field, you can type a brief description of the URL.
9. Click **OK**.

On the detail page for the open request, the **References to be added on Save** field lists the URL you specified.

10. Click **Save**.

In the **References** section of the request detail page, the **URLs** section lists the URL you added.

Specifying a Service for a Request

If your administrator has enabled the service field on the request creation page, and has created necessary request type for service, you can associate your requests each with a single service when you create and submit the requests.

To specify a service for a request:

1. On the Create New Request page of PPM Center, from the Request Type list, select the new request type you just created to create.

For example, **Email Account**.

Create New Request

*Request Type:

Email Account: Service field enabled for this request type.

2. Click **Create**.

The Create New <Request Type> page opens. Note that the **Service** field is available.

3. Under the Service section, click the selector icon for the **Service** field.

The popup window lists all services available.

4. Select a service from the list that you want to associate with the new request.
5. Complete other fields on the page as necessary.

For detailed information about creating a request from Demand Management, see the *Demand Management Configuration Guide*.

6. Click **Submit**.

Chapter 3: Viewing Requests

- "Overview of Demand Management Requests " below
- "Opening a Request" on page 43
- "Request Details Page, Top Section " on page 43
- "Request Detail Page, Header Section" on page 44
- "Request Detail Page, Details Section" on page 45
- "Request Detail Page, Notes Section" on page 54
- "Request Detail Page, Resources Section" on page 55
- "Request Detail Page, Status Section" on page 56
- "Request Detail Page, References Section" on page 60

Overview of Demand Management Requests

An Demand Management request resolution system is used to track requests from creation to resolution. Demand Management requests are highly configurable. As such, actual sections and fields can vary between different request types. Typically, each request type is associated with a unique workflow.

To interact with a request, you use the associated detail page. The detail page for a request contains all of the information about the request. Also, the detail page is where decisions and actions that pertain to the request are executed.


Your PPM Center administrator can use Demand Management to create Request Help content for any of the fields displayed on the details page for the various request types. If your administrator has added Request Help for a field, a **Help** icon  (Figure 3-1) is visible to the right of that field. To see more detailed information about the field, click this icon.

Figure 3-1. Request Help icon

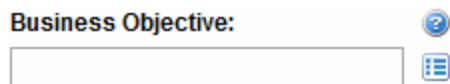


Figure 3-2 shows the detail page for an existing DEM - Application Enhancement type request, with some sections minimized. The main sections of the request detail page are as follows:

- The top of the detail page for a request displays the request type, request number, and the available actions you can perform on the request at the current workflow step. The information presented in this top area of the detail page is available after a request is created and submitted.
- **Header.** The header section contains the following two subsections:
 - **Summary.** This subsection displays information such as who created the request and on what date, and the request type.
 - **Work Item Fields.**

As you create a request, you must usually complete some of the fields in the header section. After you submit the request, you can update information in any active fields. The header section is available after a request is created.

- **Details.** The header section contains the following subsections:
 - **Enhancement Details**
 - **Analysis**
 - **Demand Management SLA Fields**
 - **Demand Management Scheduling Fields**

The details section displays information specific to the request, such as a description of the problem, the business area affected, and what is required to resolve the request. As you create a request, you must usually complete some fields in the details section. After you submit the request, you can update information in any active fields. The details section is available immediately after the request is created.

- **Notes.** Use the **Notes** section to add notes and to view any existing notes already submitted on the request. You can add notes when you create a request or later, after you submit it. The **Notes** section is available immediately after you create a request.
- **Status.** The **Status** section displays request status and is available after you create and submit a request.
- **References.** You use the **References** section to display or add additional information about the request. For example, you can add a document or URL as a reference to a request. The **References** section is available immediately after you create a request.

Figure 3-2. Request detail page

DEM - Application Enhancement 30928 - Add new purchasing codes Status: Pending Functional Spec

Review Application Definition Save Copy More

Completed Need More Info Cancel

Expand All | Collapse All

Summary

Request No.: 30928 **Requested By:** Admin User

Request Type: DEM - Application Enhancement **Created On:** January 10, 2013

Request Status: Pending Functional Spec

Workflow: DEM - Enhancement Request Process

Assigned To: Finn Gill

Assigned Group:

Requestor Department: Manufacturing

Priority: Normal **Application:** ERP Application

Description: Add new purchasing codes

+ Work Item Fields

+ Enhancement Details

+ Analysis

+ Demand Management SLA Fields

+ Demand Management Scheduling Fields

+ Notes (No Notes Exist)

Status

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Assign	Admin User	January 10, 2013 09:07:37 AM CST
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design	High Level Design		January 10, 2013 09:07:37 AM CST
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (Immediate success)			
19	Close (Immediate failure)			

Graphical View Approval Details Transaction Details

+ References

Opening a Request

There are several ways to open requests in PPM Center. The following procedure provides the steps you use to open a request from the Search Requests page in the standard interface.

To open a request:

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.



The Search Requests page opens.



3. In the available fields, enter your search criteria, and then click **Search**.

The **Request Search Results** table lists the requests that match your search criteria.

4. To sort the listed requests by request number, click the **Req #** column heading.

5. In the **Req #** column, click the number for the request to open.

6. To view the next request in your search results, click the right-pointing arrow in the upper-right corner of the page ( Result 2 of 4 ).

7. To view the previous request in your search results, click the left-pointing arrow in the upper-right corner of the page ( Result 2 of 4 ).

Request Details Page, Top Section

The top of the detail page for a request displays the request number, the request type, and the available actions. The top section is visible after a request is created and submitted. The title of the request detail page is *<Request Type> <Request Number> - <Request Description>*.

From the top section of the detail page, you can:

- Perform an available action
- Print the request details
- Save the request
- Make a copy of the request

- Delete the request
- Expand or collapse all sections on the page
- Jump to the **Status** section

Note: The number of workflow steps displayed on the toolbar depends on your screen resolution.

To see more workflow steps, you can:

- From the Control Panel, select a higher screen resolution
- Maximize your browser
- Press `ctrl` and `-` to zoom out your browser

If you have the permissions required to act on the request at the current workflow step, the toolbar lists the actions you can take. Some actions, such as **Accept** and **Reject**, move the request to another step in the workflow. If you select an action such as **Assign Resource** or **Delegate Decision**, a workflow action page opens to present additional choices. Some actions change optional fields to required.

If the action you are taking on a request requires that you provide more information, a request "look-ahead" page opens. To complete the action, provide information in the required fields, which are marked with a red asterisk. (If you cannot provide all of the information immediately, click **Save** on the look-ahead page to save the information you have provided.)

Reference relationships let you place a request on hold until another request is completed. In these reference relationships, the available actions contains the **Override** button. To allow the request to proceed through the workflow, you click **Override**. When a relationship is overridden, the change is reflected in the **References** section.

Request Detail Page, Header Section

The header section of a request detail page contains general information such as who created the request, the time and date the request was created, and the request type. The header section is included in the request creation process and continues with the request until its resolution. [Figure 3-3](#) shows a typical header section.

Typically, you must complete some of the fields in the header section to create a request. However, requests are highly configurable. The fields in a header section can be different for different request types.

Figure 3-3. Request detail page, header section

The screenshot displays the header section of a request detail page, divided into two main panels: Summary and Work Item Fields.

Summary Panel:

- Request No.:** 31383
- Request Type:** DEM - Application Enhancement (with a Change button)
- Request Status:** Pending Functional Spec
- Workflow:** DEM - Enhancement Request Process
- *Assigned To:** Finn Gill (with user icons)
- Assigned Group:** (empty field with a list icon)
- Requestor Department:** Manufacturing (dropdown menu)
- Priority:** Normal (dropdown menu)
- Description:** Add new purchasing codes
- Requested By:** Admin User
- Created On:** August 30, 2012
- Application:** ERP Application (with a list icon)

Work Item Fields Panel:

- Scheduled Start Date:** August 30, 2012 (with a calendar icon)
- Scheduled Finish Date:** September 30, 2012 (with a calendar icon)
- Scheduled Duration:** 21
- Scheduled Effort:** 168
- Workload?:** Yes (selected) / No
- Role:** System Admin (with a list icon)
- Actual Start Date:** (empty field with a calendar icon)
- Actual Finish Date:** (empty field with a calendar icon)
- Actual Duration:** (empty field)
- Actual Effort:** (empty field)
- Workload Category:** (empty dropdown menu)

Request Detail Page, Details Section

The details section of a request detail page (see [Figure 3-4](#)) contains information specific to the request, including a description of the problem, the business area affected, and the resolution of the request. The details section is included in request creation and continues with the request until resolution. Typically, when creating a request, you must complete some of the fields in the details section. After a new request is submitted, various fields must be updated as the request proceeds through the resolution process.

The details section contains several subsections, including **Problem/Resolution** and **Analysis**. However, requests are highly configurable, and the sections and controls displayed are different for different request types.

Figure 3-4. Request detail page, details section

The screenshot shows a web form titled "Enhancement Details". It contains the following fields and controls:

- Enhancement Name:** A text input field containing "Add purchasing codes for KMM subsidiary".
- Detailed Description:** A text area containing "Add purchasing codes for KMM subsidiary".
- New Enhancement:** Radio buttons for "Yes" (selected) and "No".
- Requested By:** A text input field containing "August 23, 2012".
- Requestor Location:** A dropdown menu with "US Central" selected.
- Suite:** A dropdown menu with "PUR" selected.
- Business Initiative:** A dropdown menu with "Integrated Supply Chain" selected.

Below the form are three expandable sections, each with a plus sign icon:

- + Analysis
- + Demand Management SLA Fields
- + Demand Management Scheduling Fields

Request Detail Page, New Table Component

Starting from PPM Center version 9.12, a new table component is implemented to improve usability.

The new table component is supported on the following pages:

- Create New Request page
- Request Details page
- Look-ahead page

Supported Validations

Table component fields support validations of the following component types:

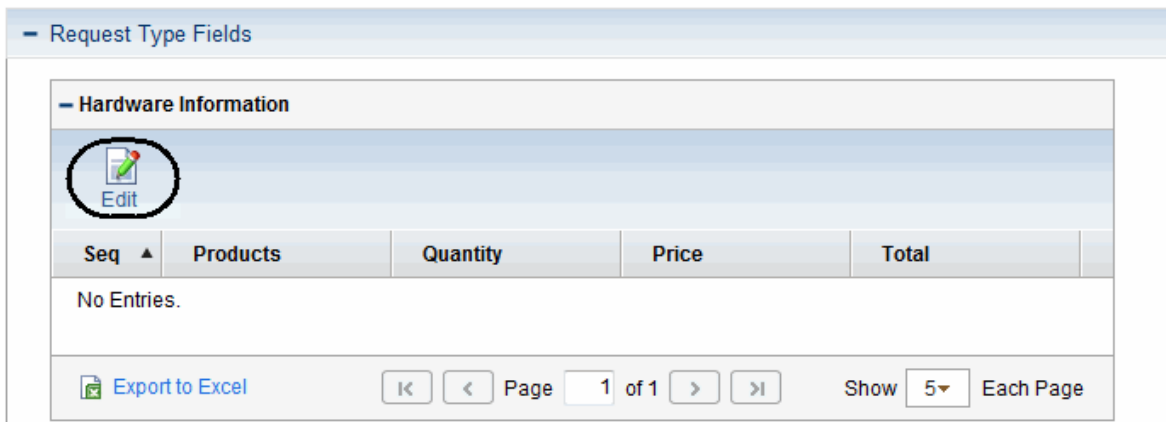
- Text field
- Drop-down list

- Radio buttons (yes/no)
- Auto-complete list
- Text area
- Date field (short, medium, and long)
- Web Address (URL)
- Password field
- Link

For more information about validations, see the *Commands, Tokens, and Validations Guide and Reference*.

New Table Component Layout

The new table component looks similar to the following after you create a new request:



You can click **Edit** to switch to Edit mode on the request page directly, and proceed to edit the table by adding rows, filling in data, and performing other operations.

Figure 3-5. The new table component in Edit mode

— Hardware Information					
<div style="display: flex; justify-content: space-between; align-items: center;"> View Add Row Copy Move Up </div> <div style="display: flex; justify-content: space-between; align-items: center;"> Delete Rows Paste Move Down </div>					
Seq	*Products	Quantity	Price	Total	
1	PC	1	5000	5000	
2	Software	1	500	500	
3	Mouse	2	100	200	
4	Keyboard	2	80	160	
5	*PC				
<div style="display: flex; justify-content: space-between; align-items: center;"> Export to Excel Page <input type="text" value="1"/> of 1 Show <input type="text" value="5"/> Each Page </div>					

Figure 3-6. The new table component in View mode

— Hardware Information					
Edit					
Seq ▲	*Products	Quantity	Price	Total	
1	PC	1	5000	5000	
2	Software	1	500	500	
3	Mouse	2	100	200	
4	Keyboard	2	80	160	
5	PC				
<div style="display: flex; justify-content: space-between; align-items: center;"> Export to Excel Page <input type="text" value="1"/> of 1 Show <input type="text" value="5"/> Each Page </div>					

The new layout is applied by default. To switch back to the original layout, set the server configuration parameter `TABLE_COMP_USE_LEGACY` to `true`. For more information, see the *Commands, Tokens, and Validations Guide and Reference*.

Editing Table Component Directly on Request Pages

You can edit the table component directly on the following pages:

- Create New Request page
- Request Details page
- Request look-ahead page

To enter Edit mode, simply click **Edit** in the table component.

Note that the **Edit** button is only available to users with edit access grant to requests or table component.

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

Resizing table columns

You can resize width of table columns in both View and Edit modes by dragging column borders in the table.

When you resize table column width, the table width is also resized automatically.

In-line row adding

Click **Add Row** to add or insert new rows directly in the table component.

When you click **Add Row**, a new row is added or inserted to the table immediately below the currently selected row, and the focus shifts to the newly added row with the new row being selected automatically.

In-line row deleting

You can delete rows from the table component directly. To do so,

1. Select the row to delete, or click additional rows while holding down **Shift** or **Ctrl** key to help select multiple continuous or non-continuous rows.
2. Click **Delete Rows**.
A warning message pops up asking for your confirmation.
3. Click **OK** if you are sure you want to delete the selected rows.
4. Click **Save Draft** or **Save** on the page. This ensures that the data in the deleted rows are removed.

Note: **Save Draft** button is available if you set the server configuration parameter `ALLOW_SAVE_REQUEST_DRAFT` to `true`.

Copying and pasting rows

You can copy or paste selected rows.

After clicking **Edit** button in the table component to switch to Edit mode, the **Copy** and **Paste** buttons become visible.

Selecting a row in the table component enables the **Copy** button, then clicking **Copy** button enables the **Paste** button.

Copying and pasting rows follows the following behaviors:

- By clicking **Copy** button, the rows of your current selection are remembered, including data in the cells and cell styles (such as editable, required, visible, CSS style, and default value as defined by UI rules). You can click **Paste** repeatedly to paste the selected rows with their data and cell styles to desired locations in the table component until you select another row or another set of rows to copy.
- When a single row is selected, if you click **Copy** and **Paste** directly, the row is inserted immediately below the currently selected row. If you click **Copy**, then select a second row and click **Paste**, the row is inserted immediately below the second row you selected. In another word, you can select a single row and insert it below any row in the table.
- When multiple rows are selected (you can click additional rows to select them while holding down **Shift** or **Ctrl** key to help select multiple rows), if you click **Copy** and **Paste**, the selected rows are always pasted continuously below the last row in the table component. If you click **Copy**, then select another row in the table component and click **Paste**, the previously selected multiple rows are pasted continuously, immediately below the row of your current selection.

Moving rows up or down

You can select a single row or multiple consecutive rows to move up or down in the table component.

The **Move Up** button and **Move Down** button become visible in the table component when you switch to Edit mode by clicking **Edit**.

To move up or move down a single row, select the desired row and click **Move Up** or **Move Down**.

To move up or move down multiple consecutive rows, click additional rows to select them while holding down the **Shift** key, then click **Move Up** or **Move Down**.

After you have finished moving up or down rows, be sure to click **Save Draft** or **Save** to save the changes.

In-line row editing

All validations supported by table component can be set to editable in PPM Workbench. For the list of supported validations, see "[Supported Validations](#)" on page 46.

For validations that are set to editable in PPM Workbench, relevant table cells in the table component are editable and you can edit them directly.

When you click a row in the table component, it becomes highlighted and editable. You can navigate the cells in an editable row by pressing the Tab key.

After you have finished editing cells and rows in the table component, click **Save Draft** or **Save** on the page to save the changes.

If any required fields (marked with a red star) are left empty, clicking **Save Draft** or **Save** prompts a warning, reminding you to provide values for required fields before you can save the table component successfully, and the first required and focusable field is focused.

If you leave the current page without saving the modified table component, a warning message pops up asking for confirmation.

Showing Total of a Table Component Column in Real-time

You can display total for a numeric column by setting **Display Total** attribute for the column to **Yes** in PPM Workbench.

- The **Total** field is visible in the table component as the last row when all rows display.
 - The **Total** value is re-calculated and displayed in real-time.
 - Supports showing the **Total** row on Printing Page.
 - Supports showing the **Total** row on exported Excel spreadsheet.
- The **Total** row is invisible in the following situations,
 - When you are not showing all entries in the table.
 - When there are no entries in the table.
 - When there is no column with **Display Total** attribute.

- Supports total token

For example, the **Total Effort** field in the following screenshot references the total token [REQD.T.CONTACT_INFO.TC.P.HOURS.TOTAL]:

Request Type Fields

– Contact Info:

View | Add Row | Copy | Move Up | Delete Rows | Paste | Move Down

Seq	Consultant	Available Date	Department	L2 Consultant	Hours
1	Mary Ann	January 26, 2013	Finance	Finn Gill	450
2	Francisco Leung	December 19, 2012	Manufacturing	Admin User	150
3	Christina Smith	December 10, 2012	Manufacturing	Finn Gill	200
4	Ray Robinson	December 1, 2012	Finance	Admin User	50
5	Jay Anderson	May 1, 2013	Manufacturing	Admin User	100

Export to Excel | Page 1 of 1 | Show 5 Each Page

Total Effort: 950

Rules Window

Rule Name: Total

Description:

Enabled? Yes No

Rule Event: Apply on field change

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
Contact Info:	contains any value

New Edit Remove

Results

Result Fields:

Field Name	Column	Token
Total Effort	1	REQD.P.TOTAL_EFFORT
	2	REQD.VP.TOTAL_EFFORT

New Remove

Logic: SQL Default ?

```
select [REQD.T.CONTACT_INFO.TC.P.HOURS.TOTAL],
[REQD.T.CONTACT_INFO.TC.P.HOURS.TOTAL] from dual
```

OK Apply Cancel

Ready

Quick Navigation through Table Rows

You can choose to show a certain number of entries in the table component.

To do so, specify an available option for the **Show *M* Each Page** field at the lower right corner.

Note: Before PPM version 9.20, when there are more than 5 entries in the table component, the **Show: *M* of *N* Entries** field appears to the right of the table component menu icons, where ***M*** is the number of entries currently displayed, ***N*** is the total number of entries in the table. Version 9.20 and later releases rename the field to **Show *M* Each Page**, and also remove the **All** option for ***M*** by design.

Other Difference

When one field on a request page is dependent on another field in the table component, UI rules are triggered and the focus (indicated with single light blue boarder lines around the table component) is lost if you click outside the table component. On a request page with the original table component layout, the UI rules are triggered by clicking **Done**.

In the following example, the **Total Effort** field references the **Total** token [REQD.T.CONTACT_INFO.TC.P.HOURS.TOTAL]:

- When you stay in the table component (indicated by the light blue board line around the table), the **Total Effort** field value is not updated.
- After you click outside the table component, the **Total Effort** field value is updated as a result of triggered SQL rule.

Considerations for Using Rules in Table Component

The new table component supports using simple and advanced SQL rules and UI rules on the following two rule events:

- **Apply on creation**
- **Apply on field change**

You can use SQL rules and UI rules in the same way you use them on request level. For details about configuring advanced SQL rules and UI rules, see the *Demand Management Configuration Guide*.

Request Detail Page, Notes Section

The **Notes** section of a detail page contains fields where notes and information concerning the request can be entered and stored. The **Notes** section is included in the request creation process and continues with request until resolution.

Figure 3-7 shows a typical **Notes** section. All **Notes** sections include the **Add Notes** section. The **Existing Notes** section is displayed after the first note is added and the request is saved.

Figure 3-7. Request detail page, Notes section

The screenshot displays the 'Notes' section of a request detail page. It is divided into two main parts: 'Add notes' and 'Existing Notes'.

Add notes: This section contains a text area labeled 'Notes to be added on save:' for entering new notes.

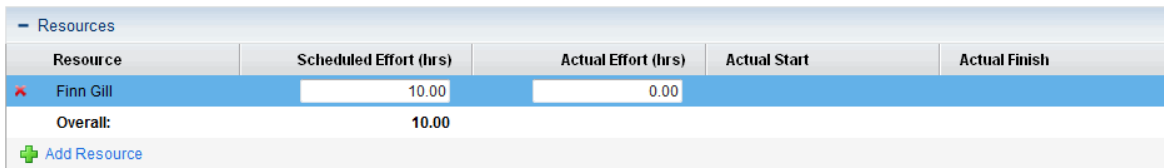
Existing Notes: This section displays a list of notes. It includes filters for 'Note Author' (set to 'ALL') and 'Changed Field' (set to 'ALL'). There is also a checkbox labeled 'Show Only User Notes' which is currently unchecked.

Note Author	Changed Field	Note Text
Admin User (admin)	New	January 22, 2013 10:19:51 AM CST The horizontal scrollbar appears to be broken in some browser. Testing is in progress.

Request Detail Page, Resources Section

If your PPM Center administrator has enabled resource tracking for the request type, the request detail page displays the **Resources** section under the details section. The **Resource** column in this section lists the resources assigned to the request so far. The section may also include **Scheduled Effort**, **Actual Effort**, **Actual Start**, and **Actual Finish** columns (see [Figure 3-8](#)).

Figure 3-8. Request detail page, Resources section



Resource	Scheduled Effort (hrs)	Actual Effort (hrs)	Actual Start	Actual Finish
Finn Gill	10.00	0.00		
Overall:	10.00			

[+ Add Resource](#)

In the **Resources** section, you can see who is assigned to and who was previously assigned to the request, what effort they contributed, and when they contributed that effort. Any time the **Assigned To** field changes (any time the request is assigned to a different resource), that resource is automatically added to the **Resources** section, and is on the request.

You can use the **Resources** section to update your actuals, and, if you have the required permissions, you can use the **Scheduled Effort (hrs)** field to change allocations for the listed resources. Creating and changing allocations for resources assigned to a request is typically done by a manager-level resource. Other resources who work on the request typically do not have permission to make planning changes, and thus, cannot modify the **Scheduled Effort (hrs)** field.

Note: If your administrator has configured the request type to use Time Management, then resources are expected to submit time sheets and log the time they worked on this request. In this case, the value in the **Scheduled Effort** field for a resource is displayed in the **Expected Hours** field on the time sheet for that resource.

In addition, after a resource submits a time sheet, he cannot edit the **Actual Effort**, **Actual Start**, and **Actual Finish** fields directly on the request. These values are now read-only, and are rolled up from the time sheet(s) submitted by the resource for the request.

If your administrator has authorized you to manage the **Resources** section, you can use the **Add Resource** button to select and add users to the list. The information displayed here may come from changes made to this section, from time sheets in Time Management, or from an advanced UI rule configured by an administrator to set up automated changes to resources.

If, in addition to being configured to track resources, the request also includes the **Work Item Fields** section, then some of these work item fields become roll-ups of the resource-level information. So, for

example, the information in the **Scheduled Effort** column in the **Work Item Fields** section is a sum of the scheduled effort specified for each resource on the request. The **Actual Effort**, **Actual Start Date**, and **Actual Finish Date** fields also become roll-ups.

Request Detail Page, Status Section

The **Status** section of a request detail page lists the workflow steps associated with a request in hierarchical order (see [Figure 3-9](#)). If a workflow step has been acted on, the status of the workflow step and who completed the step are also listed. The active workflow step is highlighted.

Figure 3-9. Hierarchy of active workflow steps in the Status table

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Approve (One User)	Approved	Admin User	September 4, 2012 12:43:10 PM CST
▶ 2	Serial_Sub_Sub_WF	Serial_Sub_Sub_WF (In Progress)		September 4, 2012 12:43:11 PM CST
▶ 2.1	PPM - Plan	PPM - Plan (In Progress)		September 4, 2012 12:43:11 PM CST
2.1.1	Allocate Resources	Immediate	Admin User	September 4, 2012 12:43:19 PM CST
▶ 2.1.2	Create Detailed Project Definition	Create Detailed Project Definition		September 4, 2012 12:43:19 PM CST
2.1.3	Project Plan Approval			
2.1.4	Business Readines Sign-Off			
2.1.5	Return From Subworkflow			
2.2	Close (Manual success)			
2.3	Approve (One User)			
2.4	Return From Subworkflow			
3	Close (Immediate success)			

[Expand Steps](#)
[Collapse Steps](#)
[Graphical View](#)
[Approval Details](#)
[Transaction Details](#)
[Current](#)




Some workflows include subworkflows. Subworkflow steps are displayed sequentially with the other workflow steps. Subworkflow steps are numbered with additional decimal places, corresponding to the workflow level (for example, 3.1, 3.2, and 3.3).

In addition to the list of workflow steps, the **Status** section ([Figure 3-10](#)) includes the following links:

- **Graphical View** displays the workflow associated with the request.
- **Approval Details** displays a detailed view of approved and completed workflow steps.
- **Transaction Details** displays detailed information of each completed workflow step transaction.

Figure 3-10. Request detail page, Status section

- Status				
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Assign	John Groom	August 23, 2012 02:04:08 PM CST
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
▶ 5	High Level Design	High Level Design		August 23, 2012 02:04:08 PM CST
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (Immediate success)			
19	Close (Immediate failure)			

 Graphical View  Approval Details  Transaction Details

Request Detail Page, Graphical View

The **Graphical View** link on a request detail page opens the Graphical Workflow window, which displays a graphical representation of the workflow applied to the request. The workflow shows which workflow steps have been visited and which workflow step is the current workflow step.

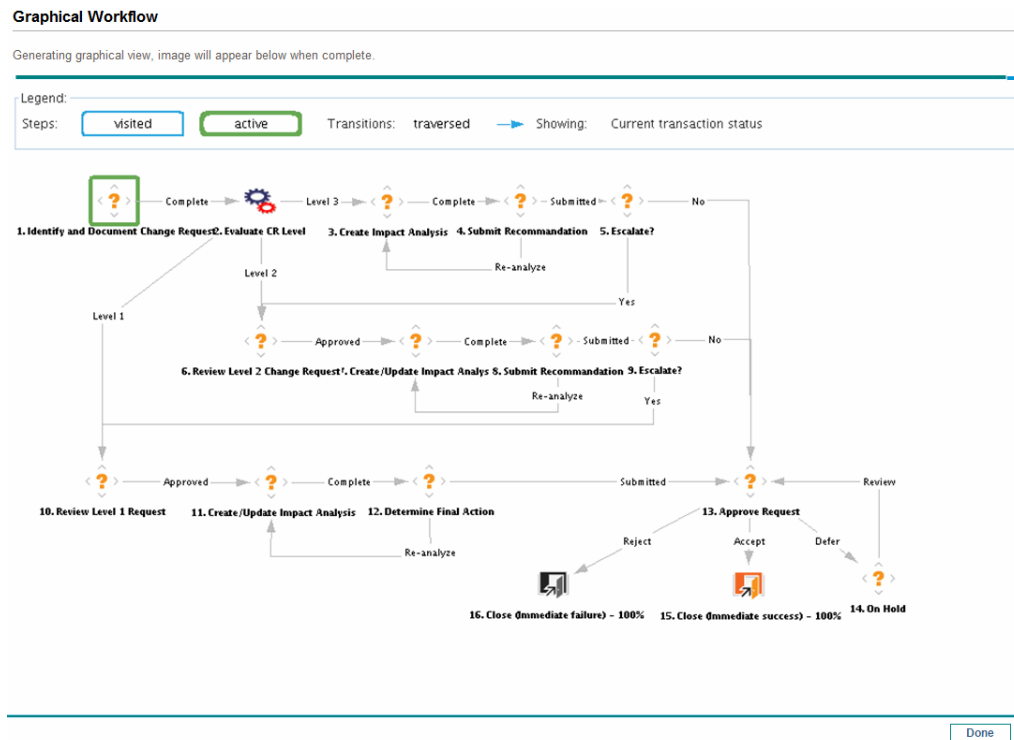
To see the graphical workflow for a request.

1. From the standard interface, open a request.

Note: For information about how to open requests, see "[Opening a Request](#)" on page 43.

2. On the detail page, from the **Jump To** navigation panel, click **Status**.
3. At the bottom of the **Status** section, click the **Graphical View** link.

The Graphical Workflow window opens.



The **Legend** section provides a key to the colors and symbols used to illustrate the workflow steps and transitions. To see a summary description of a workflow step, move your cursor to the step to view the tooltip text.

Your administrator can assign a **Current %Complete** value to individual workflow steps. As the request moves along the workflow, the percent completed is updated according to the value configured for each step.

Request Detail Page, Approval Details

The Approval Details window for a request displays a detailed view of approved active and completed workflow steps.

To view the approval details for a request:

1. From the standard interface, open a request.

Note: For information about how to open requests, see ["Opening a Request" on page 43](#).

2. On the detail page, from the **Jump To** navigation panel, click **Status**.
3. At the bottom of the **Status** section, click **Approval Details**.

The Approval Details window opens.

Approval Details - Project Risk #30844

Request Status: New

Description: ALF - Alpha - AGM US 1594 - Portlets - Project Management - Project Overview

Active Workflow Steps

2 - Project Lead Review and Assign Risk Timeout since 15 janvier 2014; Only one user must decide (no deadline)

Decision Results	Approvers	Decision Date
[No Decision]	Chen Mei	

Completed Workflow Steps

1 - Evaluate Risk Impact Level Level 3; Only One user needed to decide

Decision Results	Approvers	Decision Date
Level 3	Chen Mei	14 janvier 2014 14:08:40 CST

The **Approvers** columns list the names of the security groups whose members can act on the workflow step (or, if a workflow is completed, the security groups whose members have acted on the step). The Approval Details window also displays any conditions required to complete a workflow step (for example, All Users Must Decide).

Depending on how the workflow step is configured, the **Approvers** column lists the name of the security group, or the names of individual users. To display the names of the users who belong to a listed security group, click the security group name.

A workflow decision step can have many different results. The **Decision Results** column displays the actual result of the workflow step. The **Decision Date** column displays the calendar date on which the decision result occurred (after all required approvers and decision makers submitted their input).

Request Detail Page, Transaction Details

The Transaction Details window lists information for each completed workflow step transaction.

To view the transaction details for a request:

1. From the standard interface, open a request.

Note: For information about how to open requests, see "[Opening a Request](#)" on page 43.

2. On the detail page, from the **Jump To** navigation panel, click **Status**.

3. At the bottom of the **Status** section, click **Transaction Details**.

The Transaction Details window opens.

Request Detail Page, Request Execution Log

You can view the details related to the execution workflow step for a request by opening the Request Execution Log page.

To view the request execution log for a workflow step:

1. From the standard interface, open the request of interest to you.

Note: For information about how to open requests, see ["Opening a Request" on page 43](#).

2. On the detail page, from the **Jump To** navigation panel, click **Status**.
3. In the **Step Status** column for an execution step, click **log**.
4. The Request Execution Log page opens and displays the details of the request execution.

Request Detail Page, References Section

The **References** section of the request detail page contains additional information related to the request. For example, you can add a URL to a request or delete an outdated document from a request. The **References** section is included in the request creation process and remains through to request resolution. References can be added or deleted from the request.

Use the **Reference Additions** subsection to add references to the request. Saved references are organized based on reference type. For example, all saved reference packages are saved in the **Packages** section.

In some cases, you can create a functional dependency between a request and the referenced entity. For example, you can specify that a package is a predecessor to the request. This means the request cannot continue to the next workflow step until the package is closed. For a list of the references, their definitions, and possible dependency relationships, see ["Table 3-1. References and relationships" on the next page](#).

Figure 3-11. References section of the request detail page

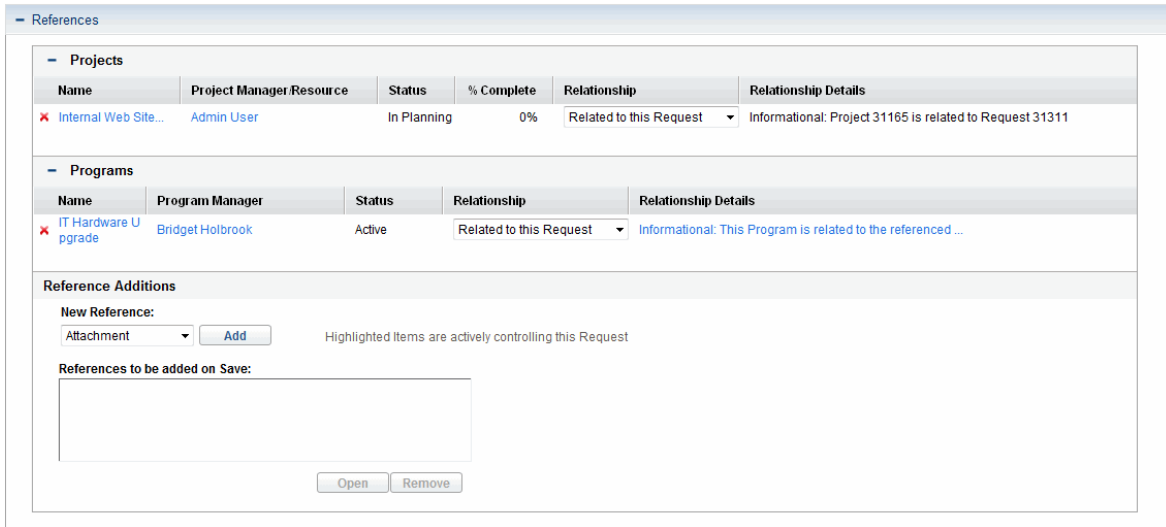


Table 3-1. References and relationships

Reference	Reference Description	Possible Relationships	Relationship Description
Attachment	Attach a file from a local machine to the current request. The attached file is copied to the server.	Standard attachment interaction	(Informational) The attachment is related to this request.
Packages (Existing)	Reference an existing package.	Child of this request	(Informational) The selected package is the child of the request.
		Related to this request	(Informational) The selected package is related to the request.
		Predecessor	(Blocking) Action is not allowed on the request until the referenced package closes.
		Successor	(Blocking) Action is not allowed on the referenced

Table 3-1. References and relationships, continued

Reference	Reference Description	Possible Relationships	Relationship Description
			package until the request closes.
Packages (New)	<p>New packages can also be created from a request.</p> <p>If configured as part of the workflow, you can spawn a package from a workflow step. When this happens, a reference to that package is automatically generated, establishing a two-way link between the request and package.</p>	Child of this request	(Informational) The selected package is the child of the request.
		Related to this request	(Informational) The selected package is related to the request.
		Predecessor	(Blocking) Action is not allowed on the request until the referenced package closes.
		Successor	(Blocking) Action is not allowed on the referenced package until the request closes.
Projects	Reference a project in Project Management.	Related to this request	(Informational) Selected project is related to this request.
Releases	Reference a release in Deployment Management.	Contains this package	(Informational) The request is contained in the selected release.
Requests (Existing)	Reference an existing request.	Duplicate request	(Informational) The referenced request is a

Table 3-1. References and relationships, continued

Reference	Reference Description	Possible Relationships	Relationship Description
			duplicate of the request.
		Original duplicate requests	(Informational) The referenced request is the original of the two duplicate requests.
		Parent of this request	(Informational) The referenced request is the parent of the request.
		Child of this request	(Informational) The referenced request is the child of the request.
		Related to this request	(Informational) Referenced request is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this request closes.
Requests (New)	You can create new requests from an existing request. Also, if configured as part of the workflow, you can	Duplicate request	(Informational) The referenced request is a

Table 3-1. References and relationships, continued

Reference	Reference Description	Possible Relationships	Relationship Description
	spawn a request from a request. A reference to that request is automatically generated, establishing a two-way link between the requests.		duplicate of the request.
		Original duplicate requests	(Informational) The referenced request is the original of the two duplicate requests.
		Parent of this request	(Informational) The referenced request is the parent of the request.
		Child of this request	(Informational) The referenced request is the child of the request.
		Related to this request	(Informational) Referenced request is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this request closes.
Tasks	Reference a task in Project Management.	Related to this request	(Informational) The referenced task is related

Table 3-1. References and relationships, continued

Reference	Reference Description	Possible Relationships	Relationship Description
			to this request.
URL	Reference a Web address. Documents at the URL must be in MIME format.	Standard URL interaction	(Informational) The URL is related to this request.

Predecessor Relationships

Predecessor relationships dictate that an action cannot be performed on one entity until the referenced entity closes. For example, an action is not allowed on a request until the referenced package closes. After the package closes, users can again act on the request. (This does not prevent users from editing other request fields.)

Successor Relationships

Successor relationships dictate that action is not allowed on a referenced entity until the entity closes. For example, users cannot perform an action on a referenced package until the request closes. The package status is **Pending Request**. After the request closes, users can act on the package again. This does not prevent users from modifying other task fields.

Finish/Finish Predecessor Relationships

Finish/Finish, or FF, predecessor relationships dictate that the two entities complete at the same time. For example, a referenced package cannot have a status of **Complete** until the original request is closed. After the resource working on the original request is finished, and the status is set to **Completed** (% **Complete** is set to **100%**), the referenced package acquires **Completed (Pending Request)** status. After the request is closed, the referenced package is set to **Completed**. (This does not prevent users from editing other request fields.)

Chapter 4: Processing and Managing Requests

This chapter contains the following topics:

- "Overview of Processing and Managing Requests " below
- "Searching Requests" on the next page
- "Opening and Updating Requests" on page 73
- "Managing Requests " on page 86
- "Using Demand Management Reports to Monitor Requests" on page 89
- Navigating among Requests on the Request Search Results Page and in Portlets of Requests Category

Overview of Processing and Managing Requests

After a new request is submitted in Demand Management, it can be *processed* and *managed*. Processing refers to updating requests and moving them through their assigned workflow steps. Managing refers to performing such actions as printing or purging requests.

To locate requests that require attention, do one of the following:

- **View Portlets.** Personalize Demand Management request portlets to display only the requests that are assigned specifically to you.
- **Perform Searches.** Use the Search Requests page.
- **Receive Notifications.** Demand Management can generate notifications from a request type or from a workflow. As a request proceeds through its workflow steps, email can be sent to notify you of pending actions. The notification might include a link that you can click to open the referenced request.

If you are logged on to PPM Center, the referenced request opens. If you are not logged on, the Logon page opens. After you log on, the referenced request opens.

You can configure request types to send email notifications after:

- A request reaches a specific workflow step
- A specific field changes value

Searching Requests

This section presents information on how to search requests in Demand Management. You can search requests in the following ways:

- Conducting basic searches
- Conducting advanced searches to locate requests based on request type-specific fields.
- Using the Query Builder
- Request Browser searches

Conducting Basic Request Searches

To conduct a basic request search based on the request number

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.
The Search Requests page opens.
3. In the **View Details for Request #** field, type the number for the request.
4. Click **Go**.

To search for and list all requests:

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.
The Search Requests page opens.
3. Click **Search**.

To search requests based on values in one or more request fields

1. Log on to PPM Center.

2. On the **Search** menu, click **Requests**.

The Search Requests page opens.

3. In the **Search for Requests to View** section, provide values in one or more of the enabled fields.

Note: If you search requests by the **Request Type** field and set the server configuration parameter `SEARCH_ALL_REQUEST_TYPE` to `true`, you can find all the request types listed in the Request Type auto-complete list, including those you have no access to. However, you are not able to view the requests you have no access to.

4. In the **Choose Columns** section:
 - a. From the **Available Columns** list, select the columns to display in the search results.
 - b. Use the right-pointing arrow to move the selected column headings to the **Selected Columns** list.
 - c. Use the up and down arrows to prearrange the order of the columns in the search results.
5. To save these search preferences:
 - a. In the **Save this search as** field, type a name for the search.
 - b. Click **Save**.
6. Click **Search**.

Note: As you navigate pages, PPM Center tracks the pages you have viewed and displays links to these pages below the menu bar. To return to a previous page, click the corresponding link.

Conducting Advanced Request Searches

You can conduct advanced searches to locate requests based on request type-specific fields.

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.

The Search Requests page opens.
3. In the **Search for Requests to View** section, use the **Request Type** autocomplete to select one or more request types to include in the search.

The **Advanced** button is now enabled.

Note: If you set the server configuration parameter `SEARCH_ALL_REQUEST_TYPE` to true, you can find all the request types listed in the Request Type auto-complete list, including those you have no access to. However, you are not able to view the requests you have no access to.

4. Click **Advanced**.

The Search page displays the fields for the request types you selected.

5. Provide input for any of the request type fields.
6. To save your search preferences:
 - a. In the **Save this search as** field, type a name for the advanced search.
 - b. Click **Save**.
7. Click **Search**.

Note: As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard. To return to a previous page such as the Search Results page, click the corresponding link at the top of the page.

Using the Query Builder to Search Requests

To locate requests, you can perform simple searches based on generic request fields, and more advanced searches based on the request fields for one or more requests. If your administrator has assigned you the Demand Mgmt: Access Request Query Builder access grant, you can also use the request query builder to create custom search queries for request type-specific fields. You access the query builder from the Demand Management Search Requests page.

Request Query Components

To use the query builder to construct a request query, you can combine multiple search terms with logical operators and use comparison operators to define search terms. A search term takes the following form:

`<FieldName> <ComparisonOperator> <Value(s)>`

where

<FieldName>	represents a field on a request.
<ComparisonOperator>	represents one of the operators listed in "Table 4-1. Supported operators for building queries" below.
<Value(s)>	represents one or more values that the field can accept.

Comparison Operators for Building Request Queries

"Table 4-1. Supported operators for building queries" below lists the comparison operators supported for building request queries in Demand Management. In the **Description** column, "value on the left" refers to the value of the request field (in the request object), identified by <FieldName> in the search term. "Value on the right" refers to the <Value(s)> specified in the search term (in the query builder).

Table 4-1. Supported operators for building queries

Operator	Symbol	Value	Description
Greater than	>	Number/Date	Value on the left is greater than the value on the right.
Less than	<	Number/Date	Value on the left is less than the value on the right.
Greater than or equal to	>=	Number/Date	Value on the left is greater than or equal to the value on the right.
Less than or equal to	<=	Number/Date	Value on the left is less than or equal to the value on the right.
Equal to	=	Number/Date	Value on the left is equal to the value on the right.
		String	Value on the left is the same as the value on the right (case-insensitive match).
Does not equal	!=	Number/Date	Value on the left does not equal the value on the right.
		String	Value on the left is not the same as the value on the right (case-insensitive match).
In	IN	Number/Date	Value on the left matches one of the values listed on the right.
		String	Value on the left matches one of the values listed on the right.
Not in	NOT IN	Number/Date	Value on the left does not match one of the values listed on the right.
		String	Value on the left does not match one of the values listed on the right.
Contains	contains	String	String on the right is a substring of the string on the left.

Table 4-1. Supported operators for building queries, continued

Operator	Symbol	Value	Description
Not Contains	Not Contains	String	String on the right is not a substring of the string on the left.
Starts with	startswith	String	String on the right is the start of the string on the left (case-insensitive).
Ends with	endswith	String	String on the right is the end of the string on the left (case-insensitive).

Logical Operators for Building Request Queries

The logical operators for building a query are AND, OR, and NOT.

You can use the operators as follows:

- Use AND/OR to link multiple search terms in a compound query.
- Prefix the NOT operator to any search term. For example:

```
Priority='High' AND Status='InProgress' AND NOT AssignedTo IN {'johndoe', 'janedoe'}
```
- The logical operator is prepended or appended to the new entry, depending on if it is added above or below an existing entry.

Grouping Search Terms in Queries

You can group one or more search terms with parentheses to create complex queries. For example:

```
(StartedOn > 6/6/09 AND StartedOn < 6/13/09) OR (StartedOn > 6/13/09 AND StartedOn < 6/20/09)
```

Using the Request Browser to Search Requests

To browse requests:

1. On the **Open** menu, click **Demand Management > Request Browser > Browse Requests**.
The Browse Requests page opens.
2. In the **Request Type** field, enter the request type(s) of the requests you are searching for.

Note: If you selected more than one request type, the Browse Requests page enables only those fields common to all the request types you selected.

3. Enter information in all of the fields on which you want to base the search.

Note: You can also use the query builder to locate requests to browse. For information about how to do this, see ["Using the Query Builder to Search Requests" on page 69](#).

4. In the **Choose Columns for Request List** section, select the available columns to include in the request pages you browse.
5. Use the up and down arrows to the right of the **Selected Columns** field to change the display order of the columns.
6. In the **Choose Fields to Group by in Request Browser Tree** section, select up to five fields to group by in the Request Browser tree.

Note: You must select at least one field.

7. Use the up and down arrows to the right of the **Selected Fields** field to change the display order of the fields.
8. To save this search, type a name for it in the **Save this Preference Set as** field.
9. Click **Browse**.

Viewing Active Workflow Steps on the Request Search Results Table

The Request Search Results table displays the active workflow steps of requests in hierarchical order. This information is shown on the **Active Workflow Step** column (See [Figure 4-1](#)).

Figure 4-1. Hierarchical order of active workflow steps in the Request Search Result table

Export to Excel Modify Search

Save this search as: Save Manage Saved Searches

Request Search Results							
Request No	Request Type	Description	Active Workflow Step	Request Status	Assigned To	Priority	Created By
<input type="checkbox"/> 30186	RT For 39581	sub-WFA:Approve (One User);PPM - Plan;Allocate Resources		Pending Resource Assignment			Admin User
<input type="checkbox"/> 30188	RT For 39581	sub-WFA;BTO Review		Under Evaluation			Admin User
<input type="checkbox"/> 30189	RT For 39581	sub-WFA;sub-sub-WFA;Quality Center Sanity Tests Execution;sub-WFA;sub-sub-WFA;Quality Center Test Execution		Execution			Admin User
<input type="checkbox"/> 30190	RT For 39581	Serial_Sub_Sub_WF;PPM - Plan;Create Detailed Project Definition		Project Definition in Development			Admin User
<input type="checkbox"/> 30191	RT For 39581	Serial_Sub_Sub_WF;PPM - Plan;Project Plan Approval		Pending Plan Approval			Admin User
<input type="checkbox"/> 30192	RT For 39581	Serial_Sub_Sub_WF;PPM - Plan;Allocate Resources		Pending Resource Assignment			Admin User
<input type="checkbox"/> 30193	RT For 39581	sub-WFA;sub-sub-WFA;Quality Center Test Lab Setup;sub-WFA;sub-sub-WFA;Quality Center Test Plan Setup		Under Evaluation			Admin User

Check All Clear All Edit Delete

Export to Excel Modify Search

The **Active Workflow Step** column displays the top layer workflow step first, followed by the lower-level workflow steps.

For example, for request 30190, the value of the **Active Workflow Step** column is:

Serial_Sub_Sub_WF; PPM - Plan; Create Detailed Project Definition

The order of these three workflow steps shows that PPM - Plan is a second-level workflow step, which is subordinate to the top-level workflow step Serial_Sub_Sub_WF. Similarly, Create Detailed Project Definition is a third-level workflow step, which is subordinate to the second-level workflow step PPM - Plan. Note that the hierarchy of the workflow steps is also illustrated in the **Status** section of the request detail page (see "[Request Detail Page, Status Section](#)" on page 56).

Opening and Updating Requests

If you have the required security permission, you can open and update Demand Management requests. This can involve:

- Searching requests
- Opening a request
- Changing information in request fields
- Adding notes or references to a request
- Performing an available action

The following sections address these tasks.

Caution: If your PPM Center instance supports multiple languages, note that request types can only be modified in the language in which they are defined. If you cannot edit a request type because it was defined in a language different from your current session language, log out of PPM Center and then log on again, this time selecting the request type's definition language as your

session language. For more information, see the *Multilingual User Interface Guide*.

Starting from version 9.30, when you launch the following pages in the Demand Management module:

- The Request Details page
- The Request Look-ahead page
- The Create Request page

The system sets focus to the first editable text field on the pages automatically. This allows you to work in the editable field directly.

The following field types support the focus functionality:

- Text Area
- Text Field
- Drop Down List
- Auto Complete List
- Radio Buttons (Yes / No)

Note: Pressing spacebar sets the focus to the **Yes** option automatically.

- Date Field
- Web Address (URL)

Opening Requests from Portlets

Demand Management request portlets include links to the request detail pages. To open the detail page associated with the request, in an Demand Management portlet, click a **Request No** link.

Note: The Request List portlet can also display links to detailed views of staffing profiles, financial benefits, and referenced documents for request types such as PFM - Asset, PFM - Proposal, PFM - Project, and Project Details. This drill-down functionality is security-based. If you do not have View, Edit, View All, and Edit All access grants for an entity, associated values are not displayed as links.

For information about Demand Management portlets, see ["Managing Requests Using Portlets" on page 91](#) and ["Portlets on the Demand Manager Page" on page 102](#).

Opening Requests from Email Notifications

Some workflow steps are configured to send email notifications upon activation. Most email notifications include a link to the request.

To open the associated request, click the link. If you are logged on to PPM Center, the referenced request opens. If you are not logged on to PPM Center, the PPM Center Logon page opens. After you log on, the referenced request opens.

If you receive an HTML notification with email approval configured, check the message to make sure that the available action buttons and links (such as the request number and recipient email addresses) are enabled. On Microsoft Office Outlook 2007, the HTML elements are disabled by default.

To enable disabled HTML elements, right-click the colored bar displayed at the top of the email message, and enable links.

Opening Requests from the Menu Bar

1. Log on to PPM Center.
2. On the **Search** menu, select **Requests**.
3. On the Search Requests page, enter your search criteria, and then click **Search**.
4. On the Request Search Results page, in the **Req#** column, click the number that corresponds to the request to open.

The detail page for the request opens.

Performing a Basic Request Edit

To perform a basic request edit.

Caution: If your PPM Center instance supports multiple languages, remember that request types can only be modified in the language in which they were initially defined. If you cannot edit a request type because it was defined in a language different from your current session language, log out of PPM Center and then log on again, this time selecting the request type's definition language as your session language. For more information, see the *Multilingual User Interface Guide*.

1. Open a request to edit.

The toolbar contains buttons for the actions that you have permission to perform.

Note: If an immediate execution workflow step is set as the first step of a workflow, there is no indicator to suggest that the execution is in progress or completed. HPE recommends that after you submit a request using this workflow, wait until the step completes the execution. If you open the request and find that it is not updated, refresh or reopen the request details page after the step completes the execution.

2. To act on the request, from the toolbar, click a button.

Note: The number of workflow steps displayed on the toolbar depends on your screen resolution. To see more workflow steps, you can:

- From the Control Panel, select a higher screen resolution
- Maximize your browser
- Press `ctrl` and `-` to zoom out your browser

Some actions, such as **Accept** and **Reject**, move the request to the next step in the workflow and require no additional input. Other actions, such as **Assign Resource** or **Delegate Decision**, require that you provide additional information.

If the action you are taking on the request requires that you provide more information, a request "look-ahead" page opens. To complete the action, provide information in the required fields, which are marked with a red asterisk.

Note: If you cannot provide all of the information immediately, click **Save** on the look-ahead page to save the information you have provided thus far.

Some actions change the status of a field. For example, a disabled field can become enabled or required (marked with a red asterisk). Check the header and details sections for newly enabled or required fields.

A request can have a reference relationship that places it on hold until another request (or other referenced entity) is completed. If the request has such a reference relationship, the available actions contains the **Override** button. To override the referenced relationship and allow the request to continue through the workflow, click **Override**.

3. In the header section, complete the fields, as required.

The header section includes general information about the request. Required fields are marked with a red asterisk. All other fields are optional. For information about a specific field, click the

Help icon (if available) next to the field.

If necessary, you can change the request type. For example, you can change a bug request to an enhancement request.

Changing the request type can involve changing the fields associated with the request. To reduce data entry if the request type is changed, Demand Management maps the fields from the original request type to the fields for the new request type. New fields contain no values. To change the request type, next to the **Request Type** field, click **Change**.

Note: Changing the request type on a request restarts the request process. In other words, the process starts again at the first step of the assigned workflow. The request retains any notes and common fields.

4. In the details section, complete the fields, as required.

The details section includes specific information about the request. It can contain one, several, or no subsections. Required fields are marked with a red asterisk. To view more information about a specific field, click the **Help** icon (if available) next to the field.

5. In the **Notes** section, type additional information about the request that you want to record.

The **Notes** section contains fields in which you can type notes about the request that you want to keep. To add a note, in the **Add Note** section, type the data. After you save the request, the note is added.

View existing notes in the **Existing Notes** section. Existing notes are listed in chronological order, with the most recent note at the top. To filter the notes for display, do one or more of the following:

- To display only the notes that users have entered, select the **Show Only User Notes** checkbox.
- To display notes that a specific user added, from the **Note Author** list, select the user name.
- To display only notes related to a changed value in a specific field, from the **Changed Fields** list, select the field name.

6. In the **Status** section, review the request status.

The **Status** section lists all of the workflow steps and the status of each. The current workflow step is highlighted.

In addition to the list of workflow steps, the **Status** section includes the following links:

- **Graphical View.** Displays the workflow associated with the request.
- **Approval Details.** Displays a detailed view of approved and completed workflow steps.

- **Transaction Details.** Displays detailed information about each completed workflow step transaction.

If the workflow step is an execution workflow step, it may be linked to a request execution log. To view the request execution log for a particular workflow step, in the **Step Status** column, click **log**.

7. Use the **References** section to add references to the request.

You can view existing references in subsections of the **References** section. Existing references are grouped by entity type. For example, referenced requests are listed in the **Requests** section.

To change the relationship of an existing reference, from the **Relationship** list, select a different relationship. To delete a reference, click the **Delete** icon to the left of the reference name.

In some cases, you might want to reference a Web-accessible file or a document or file from a local machine to the request. You can also add other entities such as packages, tasks, or other requests as request references. For information about how to add references, see ["Adding Attachments as References to a Request" on page 31](#).

8. Click **Save**.

Note: As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard. To return to a previous page, click the corresponding link at the top of the page.

Editing Requests Simultaneously

If two users edit the same request at the same time, and then click **Save**, Demand Management attempts to save the changes that both users make. If a change is not saved, Demand Management notifies the user who entered it, and advises that user to make the change and save it again.

Caution: If your PPM Center instance supports multiple languages, note that request types can only be modified in the language in which they are defined. If you cannot edit a request type because it was defined in a language different from your current session language, log out of PPM Center and then log on again, this time selecting the request type's definition language as your session language. For more information, see the *Multilingual User Interface Guide*.

Example: Two Users Editing Fields

Two users, Otumbo and Monette, are working in different locations and editing the same request.

- Otumbo makes changes to the **Assigned To** and **Department** fields, and adds text to the **Notes** field.
 - Monette makes changes to the **Assigned To** and **Company** fields, and adds text to the **Notes** field.
1. Otumbo clicks **Save** first.
All of his changes are saved.
 2. Monette clicks **Save** next.
Monette's **Notes** are saved, but a message at the top of the request informs her that another user has made changes to the request, and displays these changes. Monette must re-enter her changes to the **Assigned To** and **Company** fields.
 3. Monette again changes values in the **Assigned To** and **Company** fields, and then clicks **Save**.
The changes are saved.

Example: Two Users Editing Fields Plus Workflow Action

Two users, "Otumbo" and "Monette," are working in different locations and editing the same request. They both have permission to move the request to its next workflow step.

1. Otumbo adds to the request **Notes** section, and then clicks the workflow action button.
Otumbo's changes are saved and the request advances along its workflow.
2. Monette adds an attachment to the request, and then clicks the workflow action button.
The attachment to the request is saved, but a message at the top of the request informs Monette that the workflow action she attempted has already been performed. No further action is necessary.

Example: Parallel Workflow Steps

Otumbo and Monette are editing the same request that is being processed along parallel branches of a workflow. Both users can process the request along these parallel branches independently without problems.

Quick Edits: Editing Multiple Requests at the Same Time

Demand Management's *quick edit* feature lets you modify many requests from a single page at the same time. Simply search for requests that you want to edit. From the list of results, select those that you wish to edit, and click **Quick Edit**. The selected requests are displayed line-by-line in the spreadsheet-style interface on the Modify Requests page. You can edit the enabled fields for each listed request individually, and then save them all simultaneously.

Performing quick edits is convenient if, for example:

- In searching for unassigned requests, you find 20 new requests that you must handle. Of these requests, you want to assign 15 of them to specific resources immediately, and specify a priority for each.
- After you locate all new requests of the DEM - Application Bug type, you want to specify the priority and ensure that the correct application is specified for each of these.

The quick edit feature is enabled by default. To disable it, set the server configuration parameter `DISABLE_QUICK_EDIT_MASS_UPDATE` to `true`. For more information, see the *Demand Management Configuration Guide*.

Caution: Do not use PFM - Finish Period by Month validation for non-PFM-Proposal request types. An error occurs when performing Quick Edit or Mass Update on requests of non-PFM-Proposal request types that use PFM - Finish Period by Month validation. This is because the PFM - Finish Period by Month validation requires a field with token `KNTA_PLAN_START_DATE` for the SQL to be executed, while for most of non-PFM-Proposal request types, there is no such field.

Considerations for Performing Quick Edits

The quick edits you perform in Demand Management have the following limitations:

- You can only perform a quick edit on requests that are all of the same type. So, when you search requests, select only one request type if you plan to do a quick edit.

- Advanced UI rules that have been set up for requests do not work during quick edits. For example, any UI rules defined to dynamically show or hide a field, change the field styling, or make a field required, are not applied while a user performs a quick edit. However, upon saving the requests, any fields that would have been dynamically required based on other edits made by the user are enforced.
- You can update standard request fields (such as text fields, date fields, and lists), but you cannot edit complex components such as attachments, table components, and entity-chooser components (for example, staffing profiles) during a quick edit.
- You cannot perform quick edits to take workflow actions or to update aspects of a request other than basic field values. For instance, you cannot add notes, interact with references, or manage resources during a quick edit.
- If your PPM Center instance supports multiple languages, note that you can only edit request types in the language in which they are defined. If you cannot edit a request type because it was defined in a language different from your current session language, log out of PPM Center and then log on again, this time selecting the request type's definition language as your session language. For more information, see the *Multilingual User Interface Guide*.

Quick Edits: Error Handling

When you click **Save** or **Done**, the system attempts to save all of the requests you have updated. If problems are encountered, it displays a list of the requests that could not be saved and the reasons the saves failed.

Errors can occur if:

- A request was updated by a different user in another session before you saved your changes.
- A UI rule to make an empty field required was triggered on save (see "[Considerations for Performing Quick Edits](#)" on the previous page).

Performing Quick Edits

To perform a quick edit on a set of requests:

1. Search for a set of requests of the same type that you want to update.
The Request Search Results page opens and lists your search results.
2. Select the checkboxes for the requests on which you want to perform a quick update.

3. Below the list of requests, click **Edit**, and then select **Quick Edit**.

The Modify Requests page opens and lists the requests you selected.

4. Click the row that displays a request you want to edit.

The fields you are authorized to edit become enabled.

5. Make changes to the enabled fields you want to edit.

6. For each of the remaining requests, repeat [step 4](#) and [step 5](#).

7. To save your updates and remain in the Modify Requests page, click **Save**. To save your updates and close the Modify Requests page, click **Done**.

Note: You can also use quick edit functionality from the Request Browser. For instructions on how to use the Request Browser to search requests, see "[Using the Request Browser to Search Requests](#)" on page 71.

Tip: As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard. To return to a previous page such as the Search Results page, click the corresponding link at the top of the page.

Mass Updates: Acting on Multiple Requests at the Same Time

If you want to perform the same action on multiple requests of the same type, you can use the mass request update feature to do it. Just search for requests of a given type, and then update the entire set of requests at the same time instead of updating each individual request.

Following are some examples of situations in which mass updates are useful:

- A development manager searches for all new defect requests. He wants to assign 20 of them to the same developer. This involves updating the **Assigned To** field on all 20 requests, and pushing them from New to Assigned status.
- Fifteen requests are currently assigned to you. Because you are going on an extended vacation, you need to reassign all of these requests to another engineer.
- You need to add the same specific stakeholders to escalations from a particular customer account so that management can be copied on emails generated by activities to these escalations.

You can quickly and easily handle cases such as these by mass request updates.

The mass update feature is enabled by default. To disable it, set the server configuration parameter `DISABLE_QUICK_EDIT_MASS_UPDATE` to `true`. For more information, see the *Demand Management Configuration Guide*.

Caution: Do not use PFM - Finish Period by Month validation for non-PFM-Proposal request types. An error occurs when performing Quick Edit or Mass Update on requests of non-PFM-Proposal request types that use PFM - Finish Period by Month validation. This is because the PFM - Finish Period by Month validation requires a field with token `KNTA_PLAN_START_DATE` for the SQL to be executed, while for most of non-PFM-Proposal request types, there is no such field.

Considerations for Performing Mass Updates

As you prepare to use the request mass update feature, be aware of the following restrictions:

- Only one request type is supported for batch update.
- You can update standard request fields (such as text fields, date fields, and lists), workflow actions, and you can add notes to requests. You cannot perform mass updates on complex components such as attachments, table components, and entity-chooser components (such as staffing profiles).
- Advanced UI rules that have been set up for requests do not work during mass updates. For example, any UI rules defined to dynamically show or hide a field, change the field styling, or make a field required, are not applied while a user performs a mass update. However, upon saving the requests, any fields that would have been dynamically required based on other edits made by the user are enforced.
- If all of the requests you select to update are active at the same workflow step, you can take action on that step for all of the requests. However, you can update only one active workflow step at a time.

In addition, consider how the updates might affect automated processes. Any updates you perform may trigger subsequent updates to additional, dependent fields.

Caution: If your PPM Center instance supports multiple languages, remember that request types can only be modified in the language in which they were initially defined. If you cannot edit a request type because it was defined in a language different from your current session language, log out of PPM Center and then log on again, this time selecting the request type's definition language as your session language. For more information, see the *Multilingual User Interface Guide*.

Mass Updates: Error Handling

When you click **Save** or **Done**, the system attempts to save all of the requests you have updated. If problems are encountered, it displays a list of the requests that could not be saved and the reasons the saves failed.

Errors can occur if:

- A request was updated by a different user in another session before you saved your changes.
- A UI rule to make an empty field required was triggered on save (see "[Considerations for Performing Mass Updates](#)" on the previous page).

Performing Mass Updates

To use the request mass update feature:

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.
3. Search for requests of the request type that you want to update.
4. On the Request Search Results page, select the checkboxes for the requests to update.
5. Click **Edit**, and then select **Mass Update**.

The Modify Requests page opens and lists the selected requests.

6. Do any of the following:
 - If the **Available Actions** section is available, you can click an action button to take action on the same workflow step for all the selected requests.
 - To enter the same description for all the requests, type it into the field below the **Description** column.

To empty the **Description** field for all the requests, below the **Description** column, select the **Apply Blank** checkbox.

- To assign the same resource to all the requests, use the auto-complete under the **Assigned To** column to specify the name of the resource to assign.

To empty the **Assigned To** field for all the requests, below the **Assigned To** column, select the **Apply Blank** checkbox.

- To assign the same priority to all the requests, from the **Priority** list below the **Priority** column, select the priority value.

To empty the **Priority** field for all the requests, below the **Priority** column, select the **Apply Blank** checkbox.


Note: You can only use mass update on the columns for which fields are provided.

7. Click **Done**.

The Request Mass Update Confirmation window opens and lists the changes you are about to make.

8. To confirm that this is what you want to do, click **Continue**.

Note: You can also use mass update functionality from the Request Browser. For instructions on how to use the Request Browser to search requests, see ["Using the Request Browser to Search Requests" on page 71](#).

If any of the changes you specified could not be implemented, a message to that effect is displayed in the upper-left corner of the page next to the warning icon , along with a link to view a separate window that lists of all requests that could not be saved, and a description of the reasons.

Note: As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard. To return to a previous page such as the Search Results page, click the corresponding link at the top of the page.

Field Level Security Check

PPM Center offers security check on mass updates by adding pre-checks to the following scenarios:

- When you click **Mass Update** to perform mass updates on selected multiple requests, a security check is performed to verify the selected requests for potential issues that might cause the mass update operation fail. The security check includes the following pre-checks:
 - **Status dependencies check:** Checks field status dependencies for non-editable fields.
 - **Field level security validation:** Validates field level security of the selected requests to see if the user has appropriate privileges.
 - **Display-only check:** Checks for display-only fields.

With these pre-checks performed, the Request Batch Update page displays the requests for updates accordingly:

- If one column is not editable for ALL the selected requests, then this column is displayed as read-only and grayed out.
- If one column is editable for at least one request among the requests that users selected to update, then this column is displayed as editable.
- When you click **Save** or **Done** on the Request Batch Update page, some more applicable pre-checks are performed, such as checking the status of requests whether they are still valid for the mass update.

If any potential errors exist, for example,

- The pre-check finds that the **Editable** option for a request field is set to **No** for the current status, then update to this field would not be applied.
- A request contains fields that users do not have authorization to edit, then the request could not be updated.

Then, warning messages are displayed on the Request Batch Update Confirmation page, listing requests that could not be updated, with a descriptions of the reasons. This pro-active warning message would enable users to decide whether they want to continue or not.

- **Workflow transition check.** When you click any workflow actions on Request Batch Update page, some pre-validations are performed, including security check, check request status, and check whether an action is still available for the selected requests. If any potential errors exist, warning messages are displayed on the Request Batch Update Confirmation page for users, listing requests that could not be updated, and a description of the reasons.

Managing Requests

After you submit a request in Demand Management, users who have the required permission can view, change, or delete that request, depending on changes to the business requirements or workflow.

Reopening Closed Requests

You can reopen a request at a preconfigured step in the workflow. For example, if a defect request is closed and the defect recurs, you can reopen the request.

To reopen a request:

1. Log on to PPM Center.
2. Search for and open the request.

Note: For information about how to open a request, see ["Opening and Updating Requests" on page 73](#).

The request detail page opens.

3. From the **Jump To** navigation panel, click **Status**.
4. Click **Reopen Request**.

The request reopens.

Deleting Requests

You can only delete saved requests from PPM Center. To delete a request, you must have either the Demand Mgmt: Edit Requests access grant or the Demand Mgmt: Edit All Requests access grant. Deleted requests can no longer be opened or viewed.

To delete a request:

1. Log on to PPM Center.
2. Search for and open the request.

Note: For information about how to open a request, see ["Opening and Updating Requests" on page 73](#).

The request detail page opens.

3. In the upper-right corner, click **Delete Request**.

Demand Management prompts you to confirm that you want to delete the request.

4. Click **OK**.

Cancelling Requests

You can only cancel saved requests in PPM Center. To cancel a saved request, you must have either the Demand Mgmt: Edit Requests access grant or the Demand Mgmt: Edit All Requests access grant.

To cancel an existing request:

1. Log on to PPM Center.
2. Search for and open the request.
3. In the upper-right corner, click **More > Cancel Request**.

Demand Management prompts you to confirm the cancellation.

4. Click **OK**.

This cancels each workflow step and sets the request status to **Cancelled**.

Printing Requests

You can print the detail page for a request.

Note: You cannot modify the printable version of the detail page.

To print a request:

1. Log on to PPM Center.
2. Search for and open the request.

Note: For information about how to open a request, see ["Opening and Updating Requests" on page 73](#).

The request detail page opens.

3. In the upper-right corner, click **Print**.

A printable version of the page opens in a new browser window.

4. On the printable version of the page, click **Print**.

Purging Requests

You can delete multiple requests at the same time (if you have the required permissions). You cannot open or view deleted requests.

To purge multiple requests:

1. Log on to PPM Center.
2. Search for the requests to purge.

The search results page opens.

3. In the **Request Search Results** section, select the checkboxes that correspond to the requests you want to delete.
4. Click **Delete**.

Using Demand Management Reports to Monitor Requests

Demand Management includes a predefined set of reports, which are listed in "[Table 4-2. Demand Management reports](#)" below. If you have the System: Submit Report access grant, you can generate these reports at any time to monitor request activity.

Table 4-2. Demand Management reports

Report Name	Description
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
Demand Creation History	Shows the history of demand creation for a specified demand set. This report is useful for exporting request data to Microsoft® Excel or other data analysis tool.
Historical SLA Violation	Shows the history of SLA violations for a specified demand set. This report is useful for exporting request data to Microsoft Excel or other data analysis tool.
Import Requests	Validates and loads request data from the Demand Management open interface tables into the standard Demand Management data model.
Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using several selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered based on values in custom fields.
Request Header Type Detail	Provides the configuration details for request header types. This

Table 4-2. Demand Management reports, continued

Report Name	Description
	report is useful in auditing your setup and for debugging problems you might have with specific request header types.
Request History	Lists the complete workflow and field change history for each selected request. Details include the complete request workflow history and fields configured for auditing with every status change for every step traversed.
Demand List	Provides a list of the demands placed on an organization or resource. You can configure this portlet to display demand information filtered based on criteria such as demand type, assigned priority value, demand disposition, and so on.
Request Quick View	Provides a summary of open and closed requests, organized based on priority.
Request Summary	Displays the total counts for groups of requests matching the selection criteria.
Request Summary (Filter by Custom Fields)	Similar to the Request Summary report except that requests can be filtered based on values in custom fields.
Request Type Detail Report	Displays configuration information for request types, including details about custom fields, possible status values, default logic, and commands used with each request type.

For more information on how to configure and run these and other predefined reports in PPM Center, see the *Demand Management Configuration Guide*.

Creating an Demand Management Report

To create an Demand Management report:

1. Log on to PPM Center.
2. On the **Create** menu, click **Report**.
The Submit New Report page opens.
3. From the **Report Category** list, select **Demand Management**.
The Submit Report: <Report_Name> page opens.
4. Provide input in all required fields, and any optional fields you want to use to compose the report.
5. Click **Submit**.

Managing Requests Using Portlets

You can use the Demand Management request portlets to organize and present request information and drill down on displayed data to view more detail. [Table 4-3](#) lists the demand-related portlets that you can add to your PPM Dashboard pages (including the preconfigured Demand Manager page) and customize to suit your information needs.

For information about the default portlets displayed on the Demand Manager page, see ["Portlets on the Demand Manager Page" on page 102](#). For information about how to configure the information displayed in a portlet, see ["Setting Portlet Preferences" on page 106](#).

Table 4-3. Demand-related portlets

Portlet Name	Description
Assignment Queue	Provides a customizable view of the demand that has not yet been assigned to a resource. Use this portlet to assign a resource to a request.
Consolidated Demand	Displays a bar graph that provides a graphical overview of the demand placed on an organization. Drill-down functionality lets users view details about the requests represented.
Demand by Category	Provides graphical summary view into different aspects of demand. You can organize the information displayed in the portlet based on department, demand type, priority value, and so on. You can also organize the displayed information based on the number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.
Demand List	Provides a personalizable list of the demand placed on an organization or resource.
Issue List	Lists open issues associated with programs.
My Requests	The My Requests portlet displays all requests created by or assigned to the user, and which are at a workflow step that the user can act on. This portlet provides a view of the most pressing requests. By default, the portlet displays all requests (with a current active step) created by or assigned to the user, so that the user can see the information without having to customize the portlet.
Open Requests by Priority	This portlet displays a graphical view of the number of open requests, grouped by assigned priority value. Use this portlet to help you visualize and group open issues.

Table 4-3. Demand-related portlets, continued

Portlet Name	Description
Program Risk List	<p>This portlet lists risks associated with programs and with projects that are linked to programs. You can personalize this portlet to display risks based on program, project, impact, probability of occurrence, impact level or other criterion. You can configure the portlet to display only the programs that are relevant to your assigned activities.</p>
Program Scope Change List	<p>The Program Scope Change List portlet displays all of the scope change requests associated with projects that are linked to programs. You can configure multiple instances of this portlet for viewing different programs and the scope changes logged against their linked projects.</p> <p>You can personalize the portlet to display scope change requests based on criteria such as project name, severity, change request level, and so on.</p>
Request Activity	<p>This portlet displays general activity information such as the number of requests opened and closed during the previous two weeks, and the number of open requests. This portlet provides visibility into high traffic request types as well as the groups or users assigned to address them.</p>
Request List	<p>This portlet displays general request information, including description and status. You can click the Req# link to open the detail page for the corresponding request.</p> <p>If you configure the portlet to display the following columns (for requests such as for request types such as PFM - Asset, PFM - Proposal, PFM - Project, and Project Details), and you have the permissions required, you can click the values in these, which are also links to their corresponding entities in PPM Center:</p> <ul style="list-style-type: none"> • StaffingProfiles • FinancialBenefit • ReferenceDocuments <p>The drill-down functionality in this portlet is security-based. If you do not have View, Edit, View All, and Edit All access grants for an entity, its values will not be displayed as links.</p>
Request References	<p>The Request References portlet lists the references attached to request based on filters such as reference type, relationship, and the time period the references were added.</p>
Request Summary	<p>This portlet displays information about groups of requests, including assigned priority, request type, and the total number of requests in each category. You can drill down on any request or request group.</p>
Request Summary Bar	<p>This portlet displays a bar chart that lets you see rolled up information</p>

Table 4-3. Demand-related portlets, continued

Portlet Name	Description
Chart	about selected requests. To see the list of requests that a bar represents, click the bar.
Request Summary Pie Chart	This portlet displays a pie chart that presents rolled up information about requests that you select. To see the list of requests that a pie wedge represents, click the wedge.
SLA Exception Roll Up	This portlet provides a graphical display (bar chart) of all open demand under active service level agreements (SLA). The SLAs are configured using request type rules. According to your information needs, you can group the SLA information based on department, application, demand type, and other criteria. Violations are highlighted in red. To see a list of violating requests, click View These Exceptions .

HPE supplies a preconfigured Demand Manager page that contains request-related default portlets for use by demand managers. For detailed information about the Demand Manager page, and instructions on how to add it to your PPM Dashboard, see ["Demand Manager Page" on page 100](#).

Navigating among Requests on the Request Search Results Page and in Portlets of Requests Category

The pagination enhancements implemented to the following pages and portlets allows you to navigate among requests more easily:

- ["Enhanced Request Search Pages" below](#)
- ["Enhanced Java and Builder Portlets of the Requests Category" on page 95](#)

Enhanced Request Search Pages

Starting from version 9.30, the Request Search Results page do not display the total number of records by default for better system performance. When there are entries on the next page, the page navigation buttons are enabled.

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30361	Program Issue		New			Admin User
30360	Program Issue		New			Admin User
30359	Program Issue		New			Admin User
30358	Program Issue		New			Admin User
30357	Program Issue		New			Admin User
30356	Program Issue		New			Admin User
30355	Program Issue		New			Admin User
30354	Program Issue		New			Admin User
30353	Program Issue		New			Admin User
30352	Program Issue		New			Admin User

The Request Search Results page for saved searches still displays the total number of records. To clear the total number of records displayed for saved searches, you can use the Unchecking Showing Total Number Tool from Administration Console. For more information, see the *Installation and Administration Guide*.

However, if you prefer to show total number of records on the Request Search Results page, you can do either of the following:

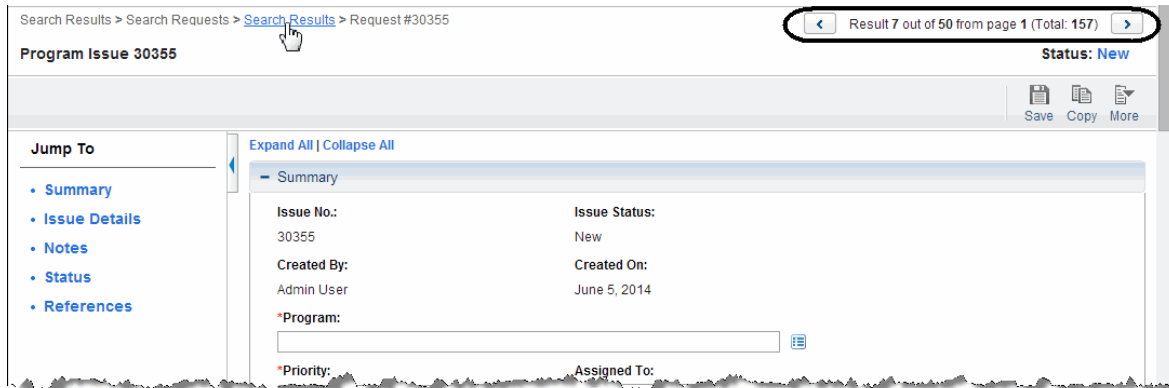
- Set the new server configuration parameter `REQUEST_SEARCH_RESULTS_SHOW_TOTAL_NUMBER_OF_RECORDS` to true from the Administration Console.
- In the **Search for Requests to View** section of the Search Requests page, select the **Show Total Number of Records** checkbox.

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30361	Program Issue		New			Admin User
30360	Program Issue		New			Admin User
30359	Program Issue		New			Admin User
30358	Program Issue		New			Admin User
30357	Program Issue		New			Admin User
30356	Program Issue		New			Admin User
30355	Program Issue		New			Admin User
30354	Program Issue		New			Admin User
30353	Program Issue		New			Admin User
30352	Program Issue		New			Admin User

Note: This operation is effective to the current search only.

Starting from version 9.30, you can also navigate among the requests on the same Request Search Results page. When you click a request number on the Request Search Results page and go to the Request Details page, the page navigation bar on the top right corner of the page allows you to,

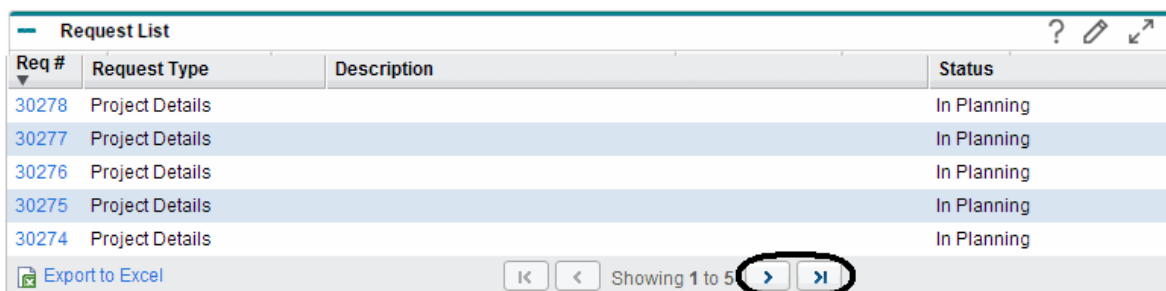
- Be aware of which request you are currently viewing, and
- Navigate to a previous or next request by clicking the arrow buttons




To navigate to a request that is not on the current Request Search Results page, you can go back to the Request Search Results page by clicking the **Search Results** breadcrumb, navigate to another search results page by clicking the right arrow button, and then go to the desired request.

Enhanced Java and Builder Portlets of the Requests Category

Starting from version 9.30, Java and builder portlets of the Requests category do not display the total number of records by default for better system performance. When there are entries on the next page, the page navigation buttons are enabled.



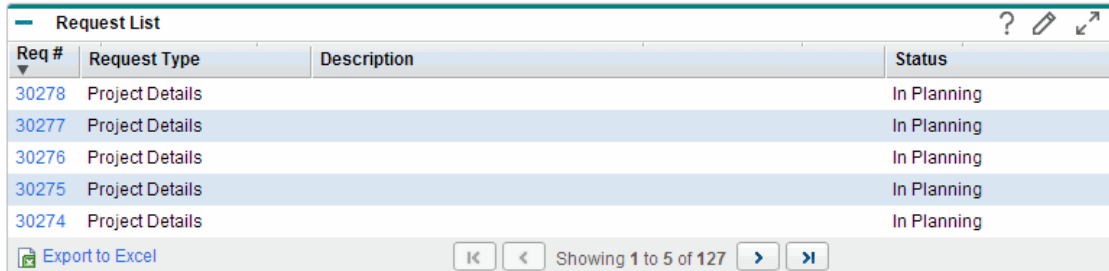
To show total number of records in a Java or builder portlet of the Requests category,

1. From the portlet, click the **Edit**  icon.

The Edit Preferences page opens.

2. In the Preferences section, select the **Show Total Number of Records** checkbox.
3. Click **Done**.

The total number of records for the portlet displays.



Req #	Request Type	Description	Status
30278	Project Details		In Planning
30277	Project Details		In Planning
30276	Project Details		In Planning
30275	Project Details		In Planning
30274	Project Details		In Planning

Export to Excel < << Showing 1 to 5 of 127 >> >

Note:

- This operation is effective to the current user only.
- To show total number in multiple Java or builder portlets of the Requests category, you need to select the **Show Total Number of Records** checkbox on the Edit Preferences page for each portlet.
- If the **Show Total Number of Records** checkbox is selected, the end page button works as expected. If the checkbox is not selected, the end page button is disabled.

Chapter 5: Integrating Requests and Projects

- ["Overview of Integrating Requests and Projects "](#) below
- ["Referencing Requests from Tasks "](#) on the next page

Overview of Integrating Requests and Projects

Customers who have both Demand Management and Project Management can integrate Demand Management's request tracking capability with Project Management's deliverable date and actuals tracking capabilities. By integrating Demand Management and Project Management, requests can be folded seamlessly into a scalable framework of interlocking initiatives.

Linking tasks to requests from Demand Management also gives instant visibility into the detailed activities that support a project. The possible relationships between projects, tasks, and requests are as follows:

- **Reference Tasks to Requests.** You can use the **References** tab on the Task Details page to link a task to new and existing requests.
- **Reference Projects from Requests.** You use the can use the **References** tab on the Task Details page to reference existing projects from requests. For information about how to reference a project from a request, see ["Adding References to Requests" on page 30](#).
- **Reference Tasks from Requests.** You use the can use the **References** tab on the Task Details page to reference existing tasks from requests. For information about how to reference a task from a request, see ["Adding References to Requests" on page 30](#).

As you integrate requests and projects, dependencies are established between the two entities. For example, you can specify a request as a predecessor to a package. This means that the package cannot continue along its workflow until the request is closed. [Table 5-1](#) lists the dependencies that you can create between requests and tasks and requests and projects.

Table 5-1. Dependency relationships

From Entity to Entity	Dependency Relationship	Description
From Request to Task	Related to this request	(Informational) The selected task is related to the request.
From Request to Project	Related to this request	(Informational) The selected project is related to the request.
From Project to Request	Related to this project	(Informational) The selected request (new or existing) is related to this project.
From Task to Request	Related to this task	(Informational) The selected request is related to the task.

For more information about relationships, see "[Request Detail Page, References Section](#)" on page 60.

Referencing Requests from Tasks

To reference a request from a task:

1. Log on to PPM Center.
2. On the **Search** menu, click **Projects**.
The Search Projects page opens.
3. Enter your search criteria.
4. Click **Search**.
The Project Search page reloads and displays the search results.
5. To open a project, from the **Project Name** list, click the project name.
6. On the **Project Summary** tab, at the top of the **Work Plan** section, click **Edit Work Plan**.
The View Work Plan page opens to the Schedule View.
7. In the list of tasks, select the task to update, and then click the **Task Details** icon.
The Task Details page opens.
8. Click the **References** tab.
9. From the **New Reference** list, select **Request (Existing)** or **Request (New)**.
10. Click **Add**.

If you selected **Request (Existing)**, the Add Reference - Request page opens. If you selected **Request (New)**, the Create New Request window opens.

11. If you selected **Request (Existing)**, do the following. Otherwise, skip to [step 12](#).
 - a. On the Add Reference: Request page, enter your search criteria, and then click **Search**.

The **Request Search Results** section lists the requests that match your search criteria.

- b. In the **Request Search Results** section, select the checkbox for the request you want to add as a reference.
 - c. Click **Add**.

The Add Reference: Request page closes and the Task Details page opens. On the **References** tab, the **References to be added on Save** field displays the request you selected.

12. If you selected **Request (New)**, do the following in the Create New Request window:
 - a. In the **Request Type** field, select the request type.

Note: You can only specify the "Related to this Task" dependency between requests and tasks.

- b. Click **Create**.

The Create New *<Request Type>* window opens.

- c. Provide all required information (marked with a red asterisk) and any useful optional information, and then click **Submit**.

The Create New *<Request Type>* window closes and the Task Details page opens. On the **References** tab, the **References to be added on Save** field displays the request you just created.

13. Click **Done**.

The request is referenced to the task. The Task Details page closes, and the View Work Plan page opens.

14. To save your changes to the work plan, click **Done**.

Chapter 6: Demand Manager Page

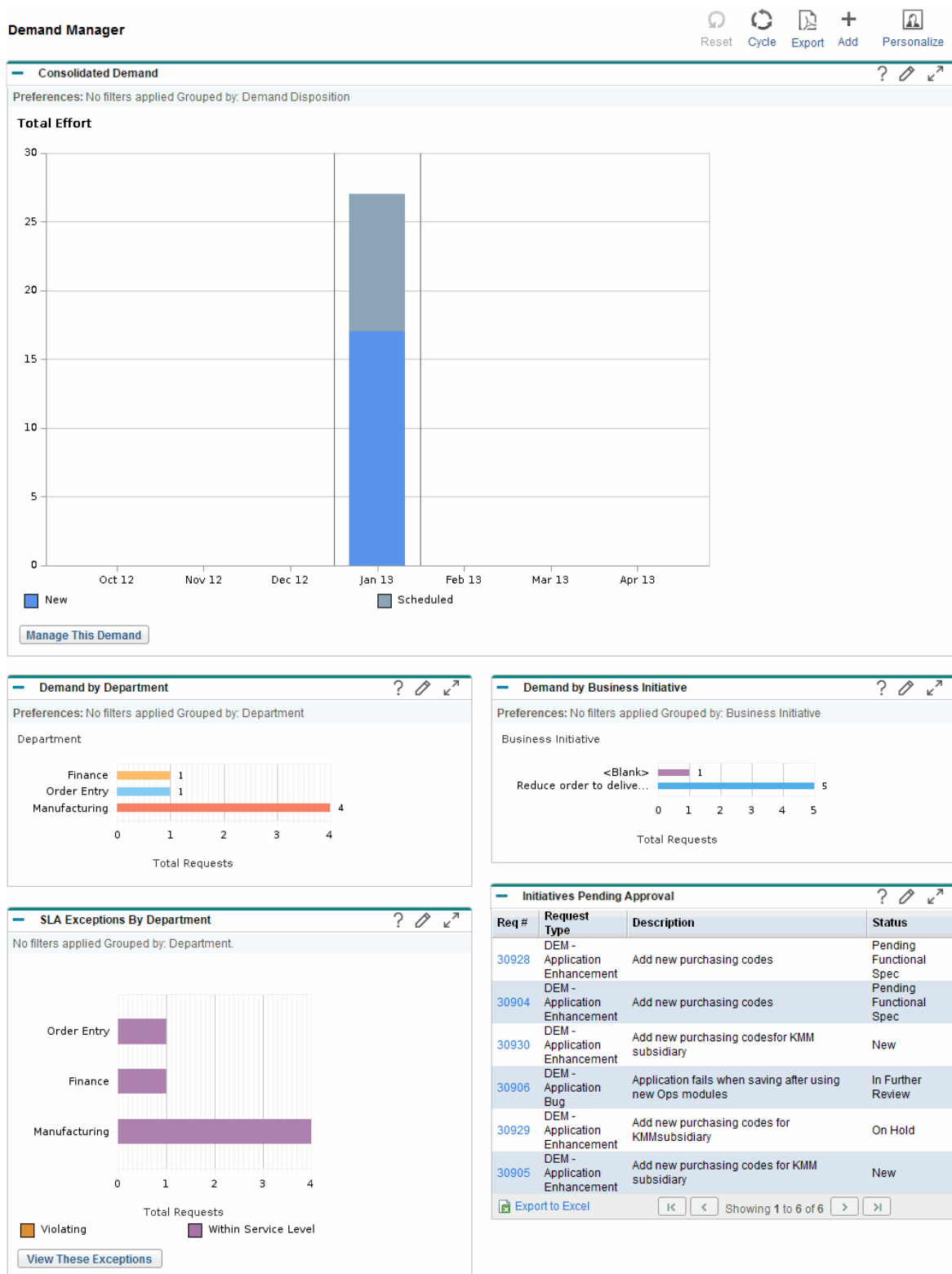
- "Overview of the Demand Manager Page" below
- "Portlets on the Demand Manager Page" on page 102
- "Setting Portlet Preferences" on page 106

Overview of the Demand Manager Page

Demand Management comes with a preconfigured Demand Manager page (shown in [Figure 6-1](#)) that displays a default set of portlets for use by demand managers. You can display additional demand-related portlets on the page, and customize the data that each portlet displays, according to your information needs.

This section contains descriptions of the default portlets displayed on the Demand Manager page, and descriptions of the demand-related portlets that you can add to the page. It also provides information about how to customize the portlets displayed on the page. For information about how to add the preconfigured Demand Manager page to your PPM Dashboard, see the *Getting Started*.

Figure 6-1. Demand Manager page



Portlets on the Demand Manager Page

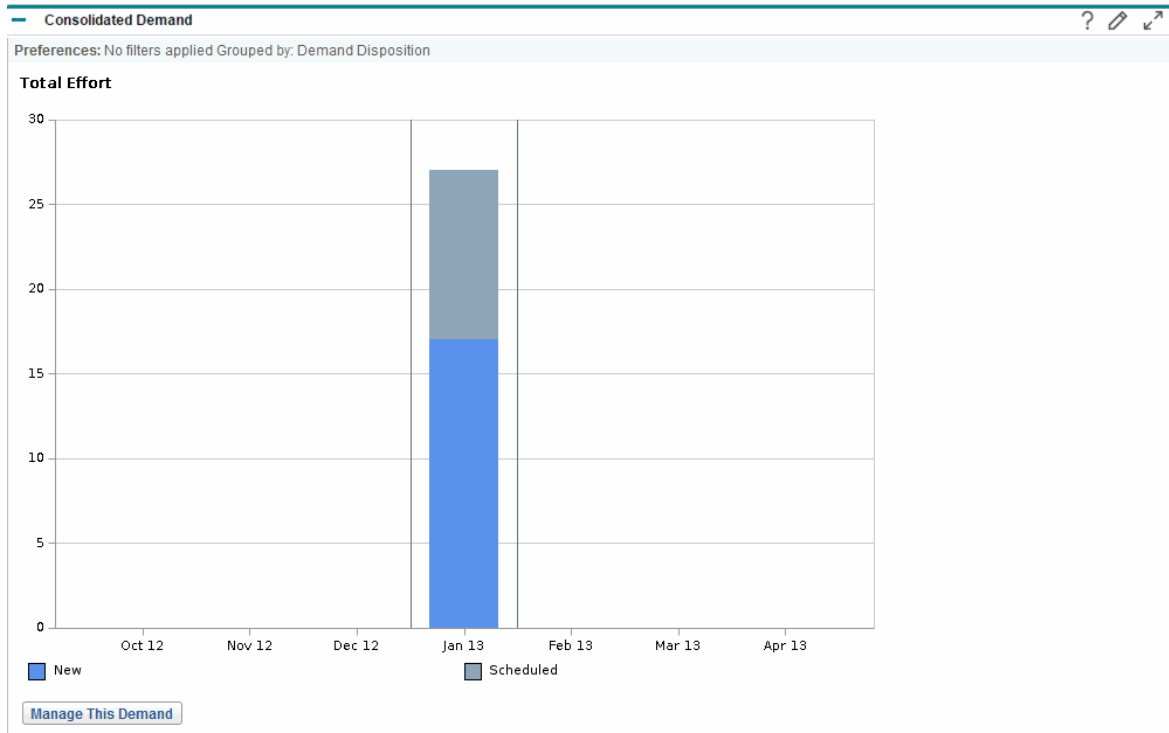
This section provides description of the default portlets displayed on the Demand Manager page. For information about how to personalize these portlets, see ["Setting Portlet Preferences" on page 106](#).

Consolidated Demand Portlet

The Consolidated Demand portlet ([Figure 6-2](#)) provides a graphical overview of the demand placed on your organization. You can drill down on a section of the graph to schedule demand categories to be satisfied, reject demand, and select filters for data displayed.

To display descriptions of all the filter fields that you can use to configure for the Consolidated Demand portlet, in the top right corner of the portlet, click the **Help** icon.

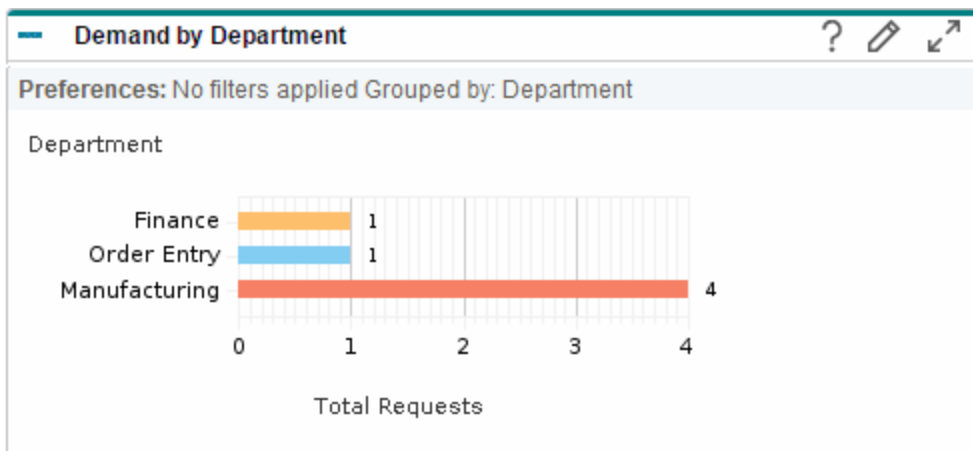
Figure 6-2. Consolidated Demand portlet



Demand by Department Portlet

The Demand by Department portlet (Figure 6-3) provides a graphical summary view of different areas of demand. You can customize the portlet to display demand information based on department, demand type, priority, and so on. You can also configure the portlet to grouped information based on number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.

Figure 6-3. Demand by Department portlet



To display descriptions of all the filter fields that you can configure for the Demand by Department portlet, in the top right corner of the portlet, click the **Help** icon.

Demand by Business Initiative Portlet

The Demand by Business Initiative portlet (Figure 6-4) provides a graphical view of different aspects of demand. This portlet provides a summary in which demand can be grouped by department, demand type, priority, and so on.

You can also customize this portlet to display the grouped information based on the number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.

Figure 6-4. Demand by Business Initiative portlet



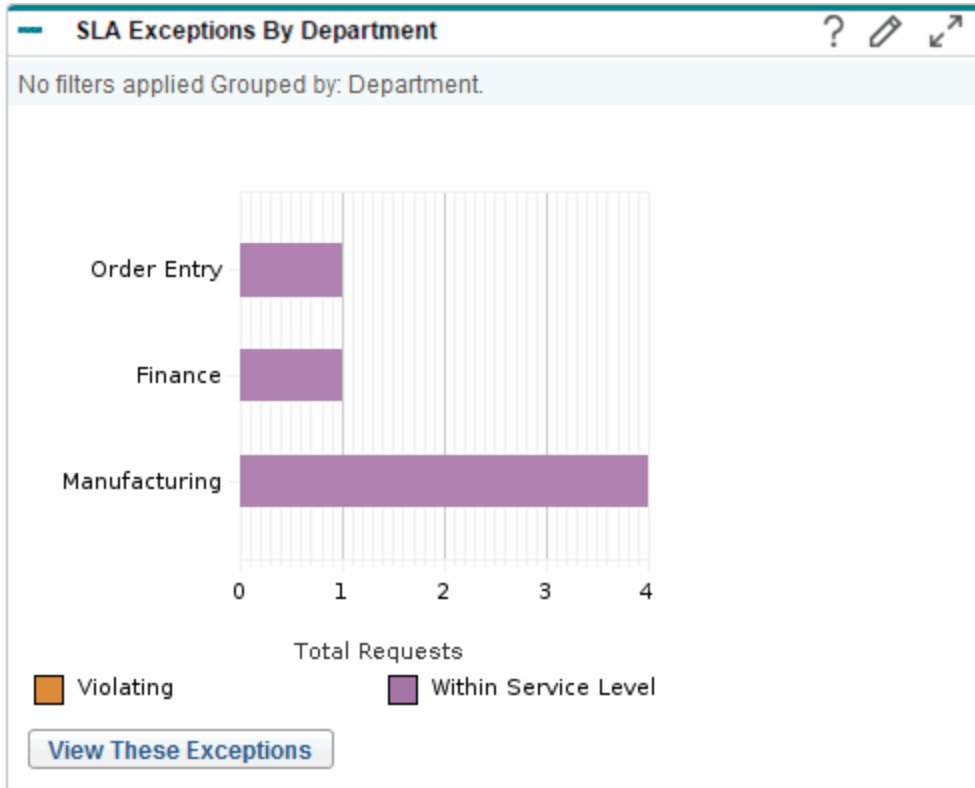
To display descriptions of all the filter fields that you can configure for the Demand by Business Initiative portlet, in the top right corner of the portlet, click the **Help** icon.

SLA Exceptions by Department Portlet

The SLA Exceptions by Department portlet (Figure 6-5) displays a bar chart of all open demand under service level agreements (SLA). The SLAs are configured using request type rules. The portlet displays the active SLAs related to demand, highlighting the violations in red.

To see a list of the violating requests, click **View These Exceptions**. You can personalize the SLA information displayed in this portlet by filtering demand based on department, application, demand type, and so on.

Figure 6-5. SLA Exceptions by Department portlet



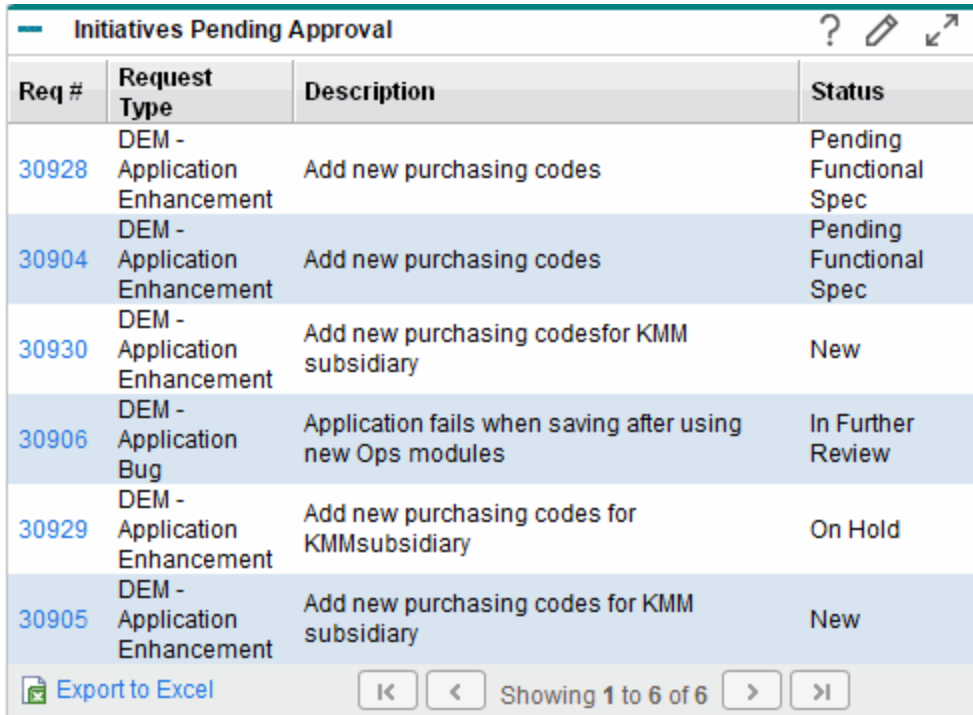
To display descriptions of all the filter fields that you can configure for the SLA Exceptions by Department portlet, in the top right corner of the portlet, click the **Help** icon.

Initiatives Pending Approval Portlet

The Initiatives Pending Approval portlet (Figure 6-6) displays general information about PPM Center requests, including request description and status. This portlet can be filtered for the same request criteria as the Request List portlet, but displays more detailed request information.

You can personalize this portlet to display the same information displayed in the Request List portlet, but in more detail.

Figure 6-6. Initiatives Pending Approval portlet



Req #	Request Type	Description	Status
30928	DEM - Application Enhancement	Add new purchasing codes	Pending Functional Spec
30904	DEM - Application Enhancement	Add new purchasing codes	Pending Functional Spec
30930	DEM - Application Enhancement	Add new purchasing codes for KMM subsidiary	New
30906	DEM - Application Bug	Application fails when saving after using new Ops modules	In Further Review
30929	DEM - Application Enhancement	Add new purchasing codes for KMM subsidiary	On Hold
30905	DEM - Application Enhancement	Add new purchasing codes for KMM subsidiary	New

To display descriptions of all the filter fields that you can configure for the Initiatives Pending Approval portlet, in the top right corner of the portlet, click the **Help** icon.

Setting Portlet Preferences

You can determine which data a portlet displays and, to some degree, how it displays the data.

To set the preferences for a portlet:

1. Log on to PPM Center.
2. Open the PPM Dashboard page that displays the portlet you want to edit.
3. In the top right corner of the portlet, click the **Edit** icon.

The Edit Preferences: <Portlet Name> page opens.

4. To change the portlet title displayed on the page:
 - a. At the top of the page, click **Change Title**.

The Edit Portlet Title window opens.

- b. In the **Title** field, select the current title, and then type a new title.
 - c. To save the title, click **Change**.
5. In the **Preferences** and **Choose Display Columns** sections, make any necessary changes.

Note: To see a description of the controls in the **Preferences** section, return to the portlet, and, in the upper right corner, click the **Help** icon.

6. Click **Done**.

The portlet reflects your changes.

For information about working with portlets, see the following documents:

- *Creating Portlets and Modules*
- *Customizing the Standard Interface*
- *Getting Started*

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 Demand Management User's Guide (Project and Portfolio Management Center 9.40)

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 your `_IE_team_PDL@hpe.com`.

We appreciate your feedback!