Mercury IT Governance Center™

Mercury Demand Management™

User's Guide

Version: 6.0

MERCURY™

Mercury
379 North Whisman Road
Mountain View, CA 94043
Tel: (650) 603-5200
Toll Free: (800) TEST-911
Customer Support: (877) TEST-HLP
Fax: (650) 603-5300

If you have any comments or suggestions regarding this document, please send email to documentation@mercury.com.

Publication Number: ITG60DemandMgtUG1104A

Table of Contents

List of Figures

List of Tables

Chapter 1 Introduction

In This Chapter:

About This Document

Mercury Demand Management™ is a product of Mercury IT Governance Center™ that manages requests from creation to implementation. Each request is processed using a graphical workflow. Demand Management features tools and configurable processes for dealing with these requests. Data is captured by prompting for process-specific information. This ensures the required information is collected and validated at the appropriate time in the process.

Mercury 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 stages of the workflow. Prioritization and delegation features allow requests to efficiently advance through their specific workflow, routing them to the relevant department, group, or individual.

This document contains the following chapters:

- Chapter 1, *Introduction,* on page 11

  This chapter provides general information concerning this document and provides an overview of Mercury Demand Management for requests.

- Chapter 2, *Viewing Requests,* on page 19

  In Mercury Demand Management, requests are how actions and processes get started. Requests contain all of the information necessary to take a series of actions and move requests through a workflow. This chapter discusses the major features of Demand Management requests.

- Chapter 3, *Creating Requests,* on page 35

  In Mercury Demand Management, requests are how actions and processes get started. This chapter discusses how to create a request.

- Chapter 4, *Processing and Managing Requests,* on page 55

  In Mercury Demand Management, once a request is created, you can process and manage the request. This chapter describes how to open and update requests, and how to manage requests using reports and portlets.

- Chapter 5, *Integrating Requests and Projects,* on page 69

  Mercury customers with both Mercury Demand Management and Mercury Project Management™ can integrate Demand Management's request tracking capability with Project Management's deliverable date and actuals tracking capabilities.

- Appendix A: *Demand Management Portlets* on page 79

  This appendix lists the Demand Management request portlets.

- Appendix B: *Reports by Category* on page 81

  This appendix lists the available reports.

Who Should Read This Document

This document is intended for the following audience:

- End users, including:
  - Users of Mercury Demand Management
  - Managers who create and manage requests
  - Business users responsible for creating and processing requests

For More Information

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

Prerequisite Documents

Prerequisite documents for this document are:

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

For More Information

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

Related Documents

Related documents for this document are:

- *Guide to Tracking and Managing IT Demand*
- *Mercury Demand Management: Configuring a Request Resolution System*
- *Reports Guide and Reference*

For More Information

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

Overview of Demand Management

A Mercury Demand Management request resolution system is used to track requests from creation to resolution. The main components of a request resolution system are:

- Requests
- Workflows

Requests are the fundamental work unit of 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.

Once a request is created, 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. Each workflow step corresponds to a decision or action.

At each workflow step, additional information can be added to the request or existing information can be updated. For example, you might create an Enhancement request, asking for a change to an application. Later in the request resolution process, once the Enhancement request has been verified, developers are assigned to make the change.

A request's detail page is where you interact with the request. A request's detail page displays all of the information regarding the request. Also, a request's detail page is where you make decisions and take actions pertaining to the request.

For example, *Figure 1-1* shows a request's detail page and a portion of its associated workflow. In this example, the request has reached the Approval Request workflow step. At the Approval Request workflow step, a user or group must make a decision. In this example, the choices are:

- Approve
- More Information
- Reject

The possible decisions are listed at the top of the request's detail page. Only a user who has the correct permissions can make the decision or take the appropriate action.

Once the decision is made or the action completed, the user must manually access the request's detail page and select the decision or action. The request then moves on the next workflow step. There, another user will need to make a decision or take an appropriate action.

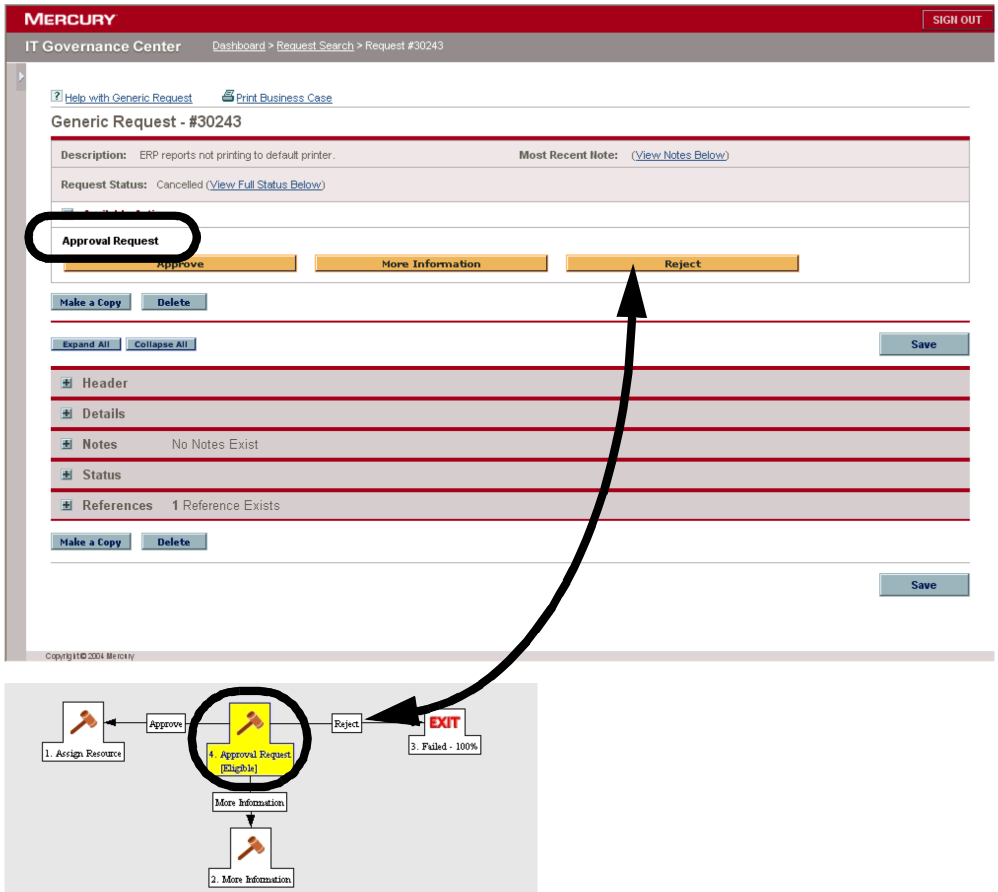


Figure 1-1. Requests and workflows

Requests, Request Types, and Request Statuses

A request is the fundamental work unit of Demand Management. A request's detail page contains all of the information that is 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. Request types determine the fields associated with a request and the workflow.

A request's 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 statuses are automatically set as the request moves through its workflow. Demand Management comes with Mercury-supplied request types that can be modified to meet your business needs.

Workflows and Workflow Steps

A workflow is a logical series of steps defining a process. Workflows can be configured to handle virtually any business process. This allows a department to create workflows to automate existing processes, rather than forcing your company to adopt a fixed set of processes.

Workflow steps are the events that are linked together to form a complete workflow. Demand Management uses 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. The workflow step is manually updated to reflect the decision or action.
- **Executions.** In execution workflow steps, the system performs an action and then updates the workflow step with the results. These actions can be as simple as calculating the value for a token or as complex as updating Web pages. Execution workflow steps are automatically updated to reflect the outcome of the action.
- **Conditions.** Condition workflows steps are logic steps, such as AND and OR. Condition workflows steps are used for complex workflow processing, such are requiring all inputs reach a workflow step before the process can continue.
- **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 the request resolution process is often necessary for a request to reach a point of resolution. While much of a request's information might be available when the request is created, some information must be acquired during the resolution process.

To make this happen, Mercury Demand Management incorporates the concept of conditional behavior for fields. For example, when a request is first entered, a field such as Assigned User is not required and might even be disabled.

As the request proceeds through the workflow, there will come a time when 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 User field. The (now required) field is displayed with a red asterisk. The request cannot proceed unless a user is assigned. In fact, the request cannot be saved unless the Assigned User field is completed.

Chapter

2

Viewing Requests

In This Chapter:

Overview of Demand Management Requests

A Mercury 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.

A request's detail page is where you interact with the request. A request's detail page contains all of the information regarding the request. Also, a request's detail page is where decisions and actions pertaining to the request are executed. If you have a question regarding the request, section, or field, Demand Management also provides the option of adding help content to requests. Requests configured with help content have the **Help** icon (see *Figure 2-1*).

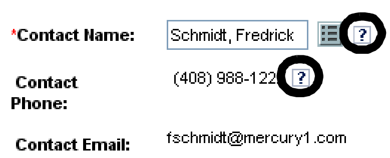


Figure 2-1. Request Help icon

Figure 2-2 shows a submitted (existing) request's detail page with its sections minimized. The following is a list of the main sections of a request's detail page and a brief description of each section:

- **Title.** The top of the request contains the request number, the type of request, and the Available Actions section. The Available Actions section displays the actions you can take concerning this specific request at this specific time in the request's workflow. The title section appears after a request is created and submitted.
- **Header.** The Header section contains general information concerning the request, such as who created the request, the date, and the type of request. Typically, when creating a request, you need to complete some of the fields in the Header section. Once the request is submitted, you can update any of the active fields. The Header section appears at the time of the request's creation.

- **Details.** 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 need to complete some of the fields in the Details section. Once the request is submitted, you can update any of the active fields. The Details section appears at the time of the request's creation.

- **Notes.** The Notes section contains fields where notes and information concerning the request can be entered and stored. Notes can be added to a request as part of creating the request, and after the request is submitted. The Notes section appears at the time of the request's creation.

- **Status.** The Status section contains status information concerning the request. The Status section appears after a request is created and submitted.

- **References.** The References section contains additional information concerning the request. For example, you might add a document or URL to a request. The References section appears at the time of the request's creation.

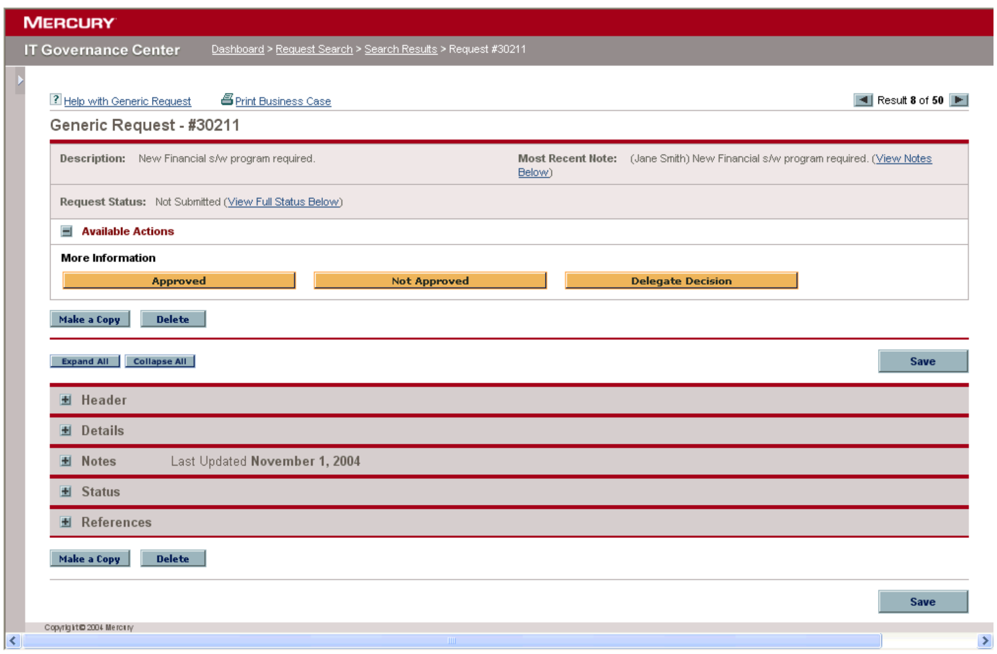


Figure 2-2. Request detail page, minimized

Request Detail Page, Title Section

The top of a request's detail page contains the request number, the type of request, and the Available Actions section. The title section appears once a request is created and submitted. The title of the request detail page is Request Type - Request #, such as **DEM - Application Bug - #30182.**

From the title section, you can:

- Print a copy of the request
- Make a copy of the request
- Delete the request

The title section also includes links to the Status section and Notes section. If you have the appropriate permissions to act on an eligible step, the available action appears in the Available Actions section. Some actions, such as **Accept** and **Reject**, usually move the request to another step in the process (workflow). For actions, such as **Assign Resource** or **Delegate Decision**, a workflow action page might appear, presenting more choices. Some actions might change optional fields to required.

Reference relationships make it possible for a request to wait until another request is complete. In these reference relationships, an **Override** button appears in the Available Actions section. Clicking **Override** allows the request to proceed through the workflow. When a relationship is overridden, the relationship is changed in the References section.

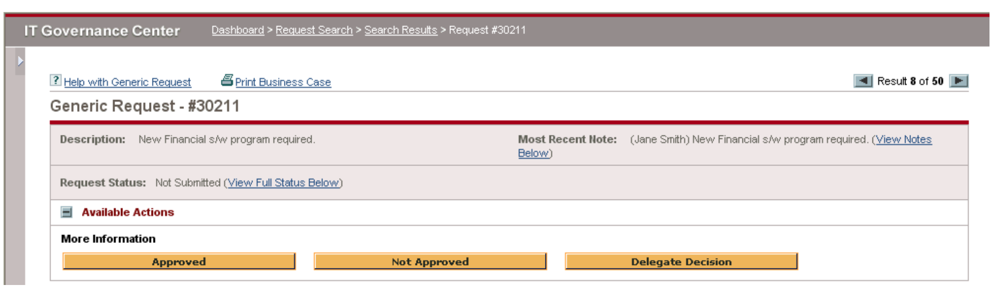


Figure 2-3. Request detail page, general information

Request Detail Page, Header Section

A request's detail page Header section contain general information concerning the request, such as who created the request, the date, and the type of request. The Header section is included in the request creation process and continues with the request until resolution. Typically, when creating a request, you need to complete some of the fields in the Header section. *Figure 2-4* shows a typical Header section, however, requests are highly configurable. As such, the fields in a Header section can vary between different types of requests.

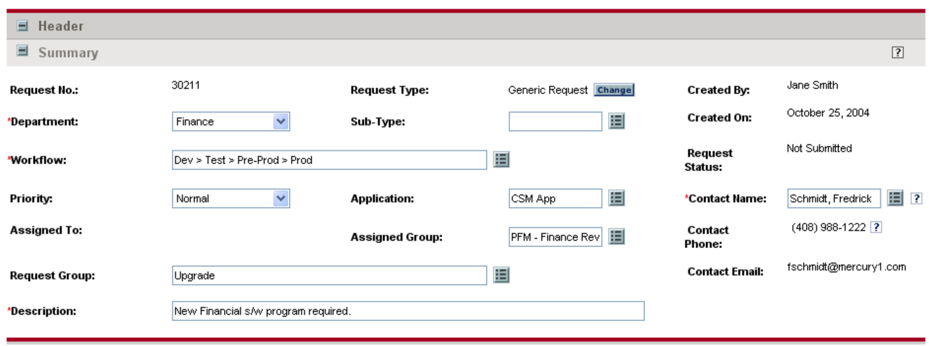


Figure 2-4. Request detail page, Header section

Request Detail Page, Details Section

A request's detail page 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. The Details section is included in the request creation process and continues with request until resolution. Typically, when creating a request, you need to complete some of the fields in the Details section. Once a request is created and submitted various fields will need to be updated as the request proceeds through the resolution process.

Figure 2-4 shows a Details section. Within this example section are several other subsections including Problem/Resolution and Analysis. However, request are highly configurable. As such, actual sections and fields can vary between different types of requests.

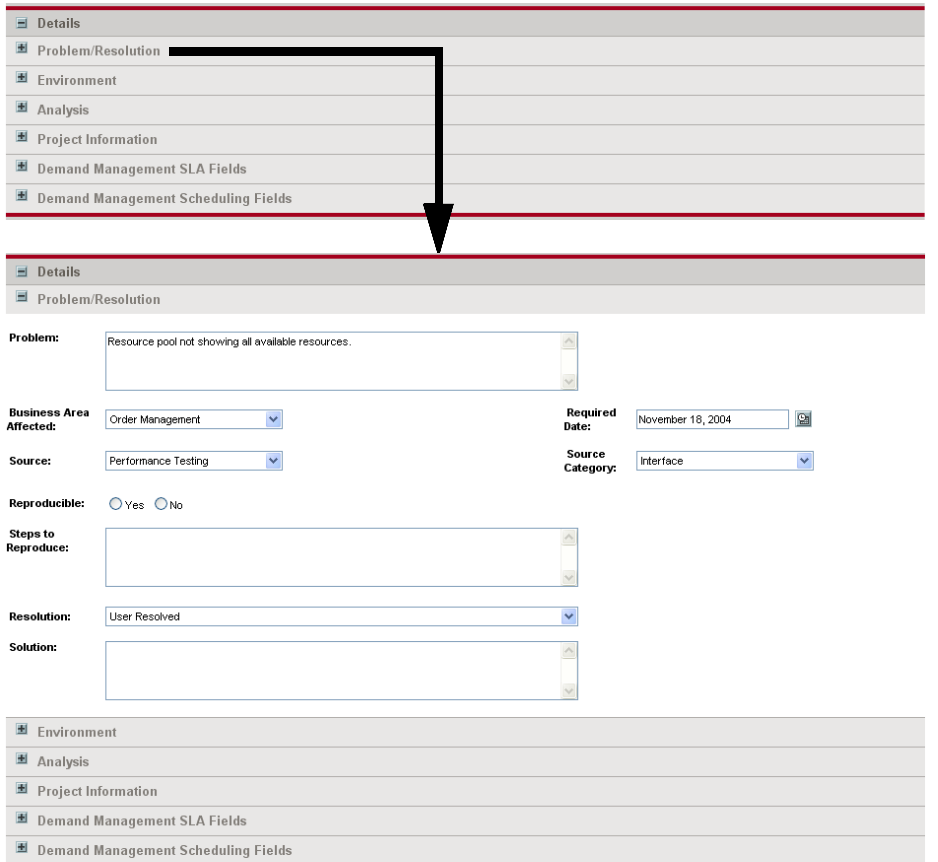


Figure 2-5. Request detail page, Details section

Request Detail Page, Notes Section

A request's detail page Notes section 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. Typically, when creating a request, you do not need to add a note to the request.

Figure 2-6 shows a typical Notes section. All Notes sections include the Add Note section. The Existing Notes section is created when the request's first note is created.

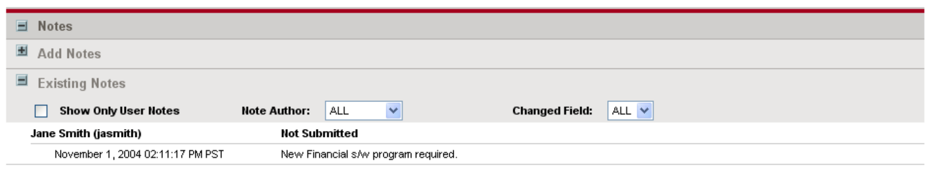


Figure 2-6. Request detail page, Notes section

Request Detail Page, Status Section

A request's detail page Status section lists the workflow steps associated with a request. If a workflow step has been acted on, the status of the workflow step and who completed the step are also listed. Workflow steps can be linked to a Web address (URL) which might describe the workflow step or provide some other information. The active workflow step is highlighted.

If you have the appropriate permissions to act on the active workflow step, a **View Available Actions** link appears in the Step Status column (see *Figure 2-7*). Click the link to access the workflow step's available actions. Note that the available actions are also shown in the Available Actions section of the title section (see *Request Detail Page, Title Section*).

Some workflows include subworkflows. Subworkflow steps found within a workflow are displayed sequentially along with the other workflow steps. Subworkflow steps are numbered with additional decimal places, corresponding to the level of the workflow, such a 3.1, 3.2, and 3.3.

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

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

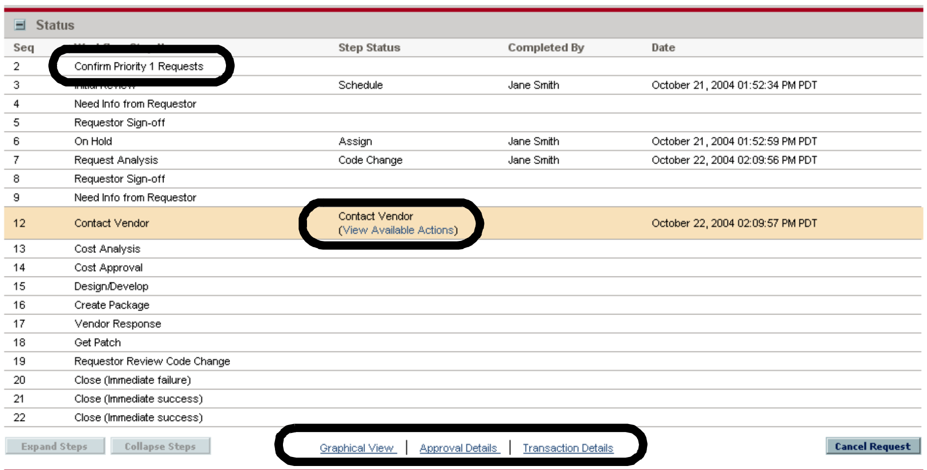


Figure 2-7. Request detail page, Status section

Request Detail Page, Graphical View

A request’s detail page Graphical View displays the workflow associated with the request. The workflow shows which workflow steps have been visited and which workflow step is the current workflow step.

A Current % Complete value can be assigned to individual workflow steps. As the request moves along the workflow, the percent completed is updated according to each step’s configured value (see *Figure 2-8*).

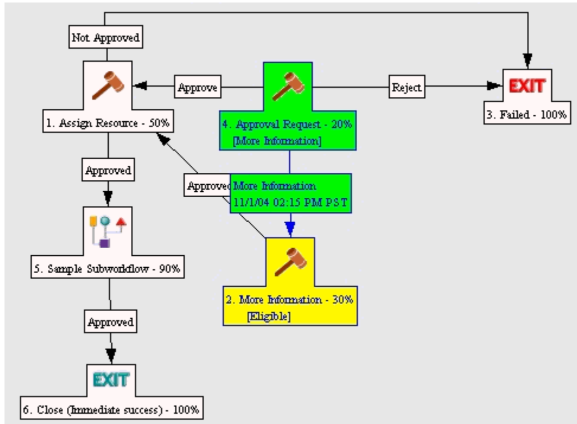


Figure 2-8. Request detail page, Graphical View

Request Detail Page, Approval Details

A request's detail page Approval Details displays a detailed view of approved and completed workflow steps. The Approvers column lists the users of the security groups who can act on the workflow step. Additionally, Approval Details displays the requirements to complete a workflow step, such as All Users Must Decide. Depending on the configuration of the workflow step, the Approvers column will list the name of the security group, not the name of the users. Click on the security group to display the users belonging to the security group.

Figure 2-9. Request detail page, Approval Details

Request Detail Page, Transaction History

A request's detail page Transaction Details displays a detailed list of information for each completed workflow step transaction (see *Figure 2-10*).

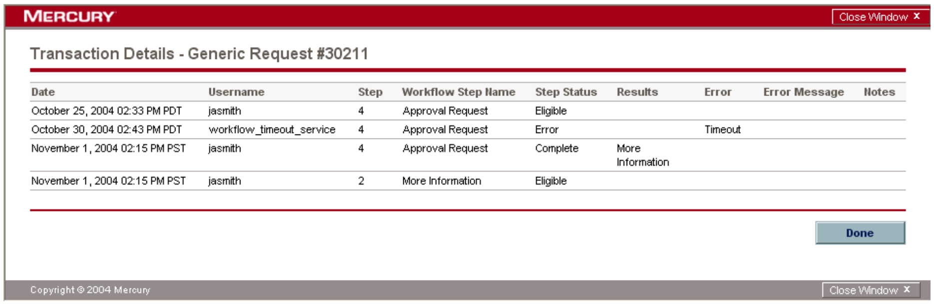


Figure 2-10. Request detail page, Transaction History

Request Detail Page, Request Execution Log

It is possible to view the details of the execution of a particular request by viewing the Request Execution Log. To view the Request Execution Log for a particular workflow step, click **log** in the Step Status column. The Request Execution Log page appears. From this page, you can view the details of the request's execution.

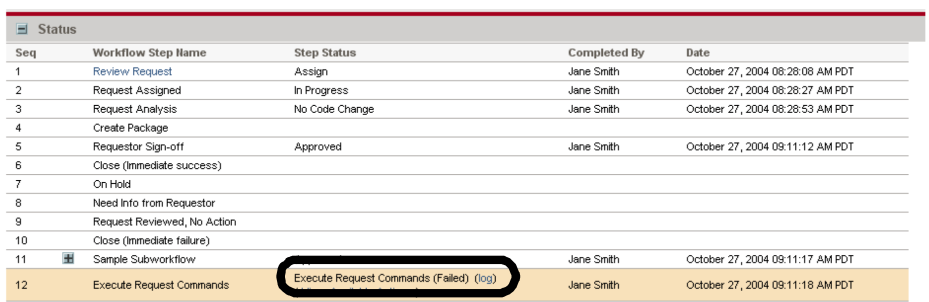


Figure 2-11. Request detail page, execution log

Request Detail Page, References Section

A request's detail page References sections contain additional information concerning the request. For example, you might 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 continues with request through the request's conclusion. References can be added or deleted from the request.

The Reference Addition section is used to add a reference to the request. Saved references are organized by reference type, such as all saved reference packages are saved in the Packages section. In *Figure 2-12*, two references were added to the request, another request (in the Requests section) and a package (in the Packages section).

For some references, a functional dependency between the request the referenced entity can be created. For example, you can specify that a package is a predecessor to the request. This means the request will not continue until the package is closed. See *Table 2-1* for a list of the references, their definitions, and their possible dependency relationships.

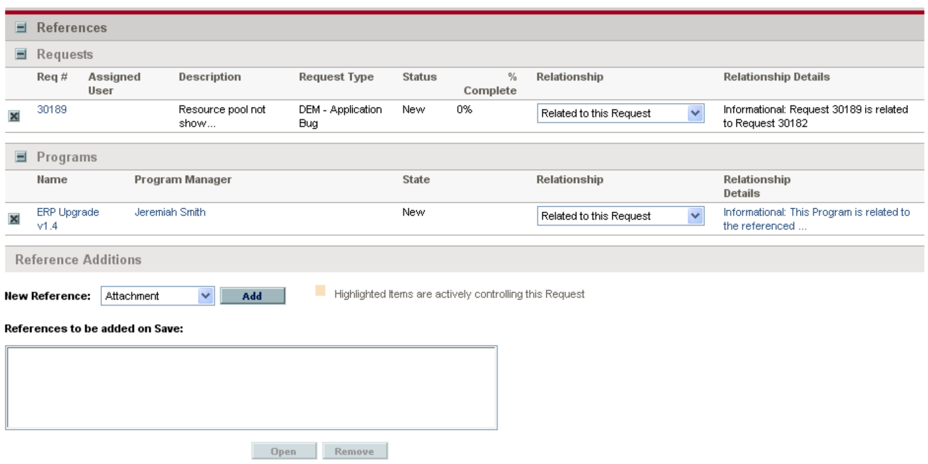


Figure 2-12. Request References section

Table 2-1. 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 packages.	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.
Packages (New)	New packages can also be created from a request. 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.	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 Mercury Project Management.	Related to This Request	(Informational) Selected project is related to this request.
Releases	Reference a release in Mercury Change Management™.	Contains This Package	(Informational) - The request is contained in the selected release.

Table 2-1. References and relationships [continued]

Reference	Reference Description	Possible Relationships	Relationship Description
Requests (Existing)	Reference an existing request.	Duplicate Request	(Informational) The referenced request is a 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.

Table 2-1. References and relationships [continued]

Reference	Reference Description	Possible Relationships	Relationship Description
Requests (New)	New requests can be created from an existing request. Also, if configured as part of the workflow, you can spawn a request from a request. When this happens, a reference to that request is automatically generated, establishing a two-way link between the requests.	Duplicate Request	(Informational) The referenced request is a 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 a Mercury Project Management.	Related to This Request	(Informational) The referenced task is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced task closes.
		Successor	(Blocking) Action not allowed on the referenced task until this request closes.
		FF Predecessor (Finish Finish Predecessor)	(Blocking) The referenced task does not complete until the request closes.
		Request Updates Task	(Auto-updating) The referenced task is automatically updated by the 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 action is not allowed on one entity until the referenced entity closes. For example, a request cannot complete any workflow action until the referenced task is closed (**Completed**, **Bypassed**, or **Cancelled**). The request's status is **Pending Task.** When the task closes, the request can be acted upon once more. This does not stop other request fields from being edited.

Successor Relationships

Successor relationships dictate that action is not allowed on referenced entity until the entity closes. For example, a referenced task cannot change its status until the original request is closed. The task's status is **Pending Request.** When the request closes, the task can be acted upon once more. This does not stop other task fields from being edited.

FF Predecessor Relationships

FF predecessor relationships dictate that the two entities complete at the same time. For example, a referenced task cannot have a status of **Complete** until the original request is closed. When the resource working on the task is finished and the state is set to **Completed** (% Complete will be set to **100%**), the referenced request will have a status of **Completed (Pending Request).** When the request is closed, the referenced request is set to **Completed.** This does not stop other request fields from being edited.

Auto-Updating Relationships

Auto-updating relationships dictate that one entity is automatically updated by the second entity. For example, as a request moves through its process, it will update a task with its status information. When the request is submitted, the tasks moves to **In Progress.** When the request is completed, the task is **Complete.** When the request is cancelled or deleted, the task is cancelled.

A single request can drive multiple tasks. If the request's workflow has % Complete values defined, the request will also update the task with % Complete information. Since % Complete and Task State are automatically updated by the driving request(s), you cannot update these two fields on the task.

Chapter

3

Creating Requests

In This Chapter:

Overview of Creating Requests

In Mercury Demand Management, requests are how actions and processes get started. Requests contain all of the information necessary to take a series of actions and move request through a workflow. The information contained on a request is different for different request types. For example, if you create an Enhancement request, the information required is different than if you create DEM - Application Bug request. However, most request types have the same basic organization.

Figure 3-1 shows a common request retail page that has been minimized to show only the main sections. The following is a list of the main sections and a brief description:

- **Header.** The Header section of a request's detail page contains general information concerning the request, such as who created the request, the date, and the type of request. Typically, when creating a request, you'll be required to complete some of the fields in the Header section.
- **Details.** The Details section of a request's detail page contains information specific to the request, such as a description of the problem, the business area effected, 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.
- **Notes.** The Notes section of a request's detail page contains fields where notes and information concerning the request can be entered and stored. Typically, when creating a request, you do not need to add a note to the request.
- **References.** The References section of a request's detail page contains additional information concerning the request. For example, you might add a document or URL to a request. References are often added when creating a request.

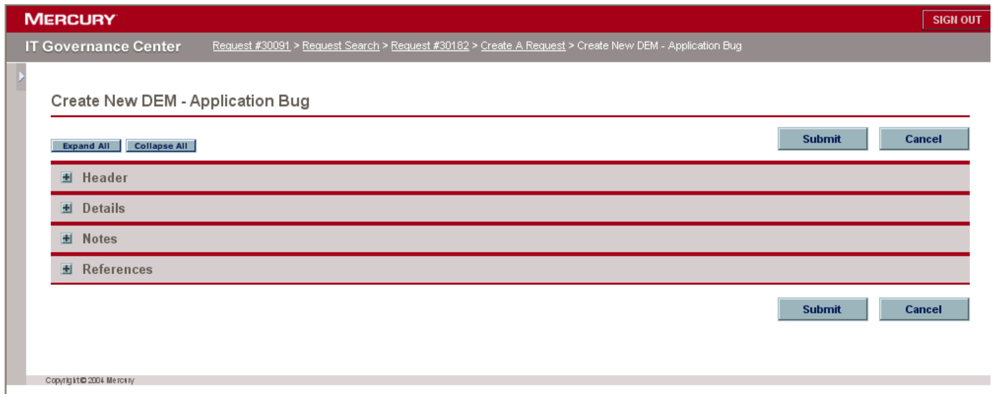


Figure 3-1. Create New Request, minimized

For More Information

For more information concerning request detail pages, see *Viewing Requests* on page 19.

Creating Requests

Requests are created using the Create New Request page. There are several ways to reach the Create New Request page, including:

- From the menu bar
- From a request's References section
- By copying an existing request
- From a Mercury Project Management project
- From a Mercury Project Management task
- From a Mercury Change Management package
- From a Mercury Change Management release

For More Information

- For information on how to create a request from Mercury Project Management, see *Integrating Requests and Projects* on page 69.
- For information on how to create a request from Mercury Change Management, see the *Mercury Change Management User's Guide*.

Creating Requests from the Menu Bar

The most common way to create a request is by using the menu bar. Once created, the request will be given a unique number and is tracked from start to finish. This ensures task completion and accountability for all steps within the request's selected workflow.

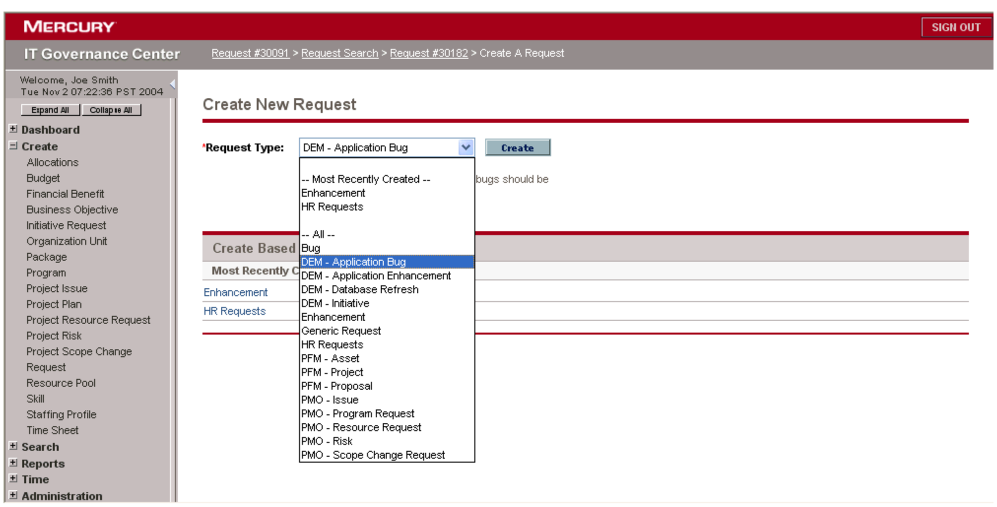
To create a new request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. From the menu bar, select **Create > Request.**

   The Create From Available Request Types page appears.

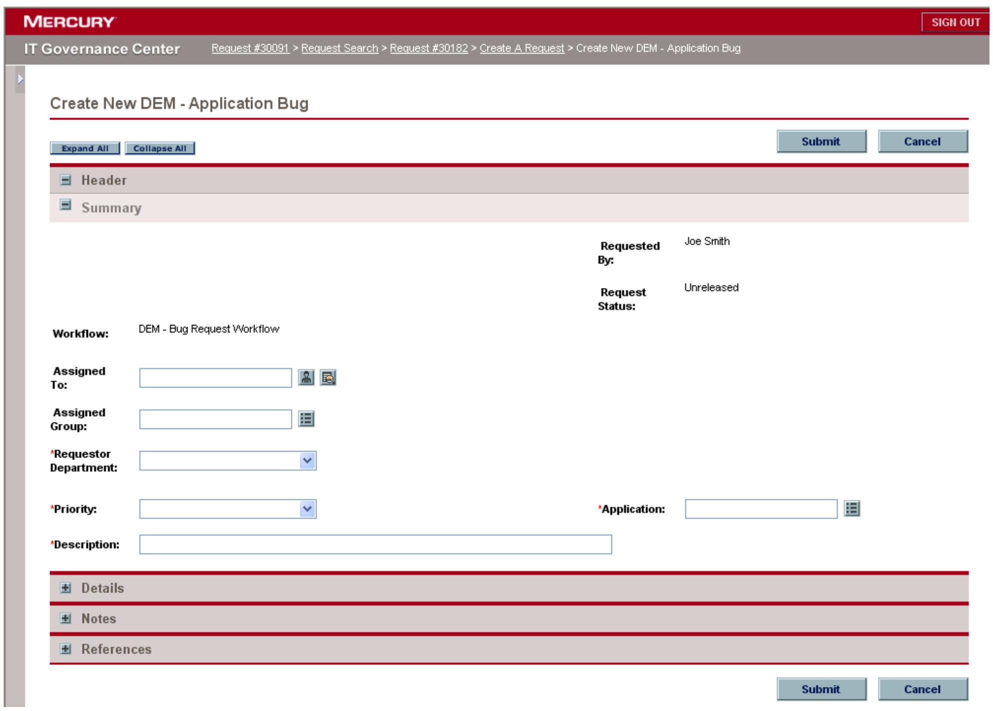


3. In the Create From Available Request Types page, from the Request Type drop-down list, select the type.

   The selection of request types depends on your licenses, security groups, and access grants. To save time, the most recently created request types are listed in the Create Based on Desired Action section.

4. In the Create From Available Request Types page, click **Create.**

   The Create New Request page appears.



5. In the Header section, complete the fields as required.

   The Header section includes general information concerning the request. Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing an open request. For information concerning a specific field, click the **Help** icon next to the field (if available).

6. In the Details section, complete the fields as required.

   The Details section includes specific information concerning the request. The Details section can have none, one, or many subsections. Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing an open request. For information concerning a specific field, click the **Help** icon next to the field (if available).

7. In the Notes section, enter additional information.

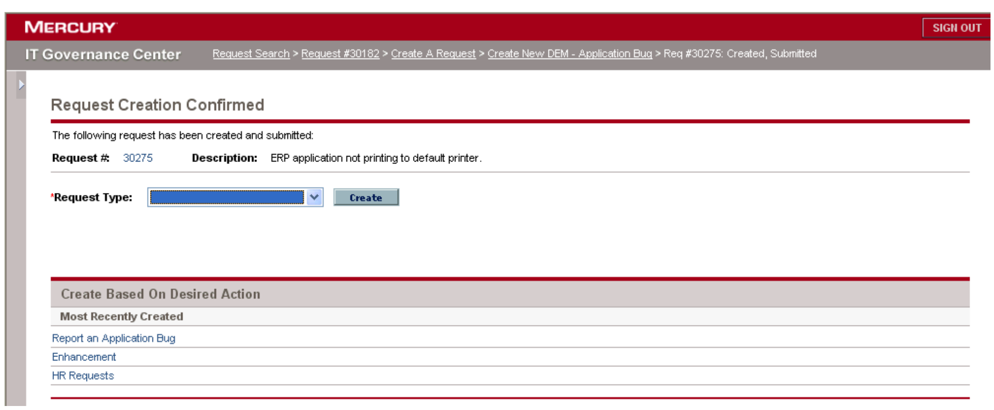
   The Notes section contains fields where notes and information concerning the request can be entered and stored. Typically, when creating a request, you do not need to add a note to the request. However, add a note if you want to convey additional information to the reviewers and processors of the request.

8. In the References section, add references to the request.

   In some cases it might be useful to reference a Web accessible file or attach a document or file from a local machine to the current request. Additionally, other entities such as packages, tasks, or other requests can be referenced. For more information on adding references, see *Overview of Adding References* on page 43.

9. In the Create New Request page, click **Submit.**

   The request is submitted. The Request Creation Confirmed page appears.



Note

Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed, you can click the link (Request #) to see the newly generated request's detail page.

Once a request has been submitted, it is assigned an initial status, such as New. It is then routed along a standard business process of approvals, decisions, or actions, depending on the associated workflow. See *Processing and Managing Requests* on page 55 for details.

Creating Requests from a Request's References Section

A request can be created from the References section of a request's References section.

To create a request from a request's References section:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Open a request.

   You can open an existing request or create a new request from the menu bar.

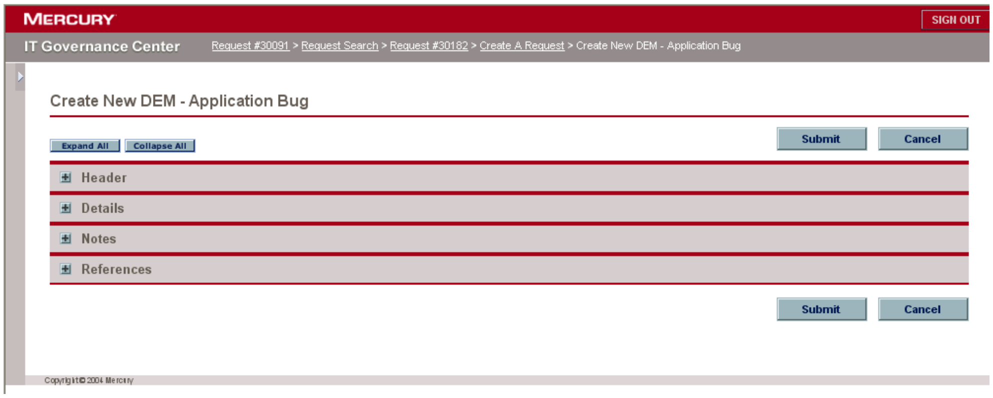
   - To open an existing request, see *Opening and Updating Requests* on page 56.
   - To create a new request, see *Creating Requests from the Menu Bar* on page 38.

3. Scroll down to the References section.

4. In the References section, from the New Reference drop-down list, select **Request (New).**

5. In the request's References section, click **Add.**

   The Create New Request page appears.



6. From the Request Type drop-down list, select the type of request to create.
7. In the Relationship section, select a Relationship by checking the appropriate radio button. For more concerning relationships, see *Overview of Adding References*.
8. On the Create New Request page, click **Create.**

   The Create New Request page appears.
9. Complete the Create New Request page.

   For instructions on how to complete the Create New Request page, see *Creating Requests from the Menu Bar* on page 38.

Creating Requests by Copying Requests

A new request can be created by copying an existing request. This can save time by eliminating the need to reenter information that is common between the requests.

To create a new request using copy:

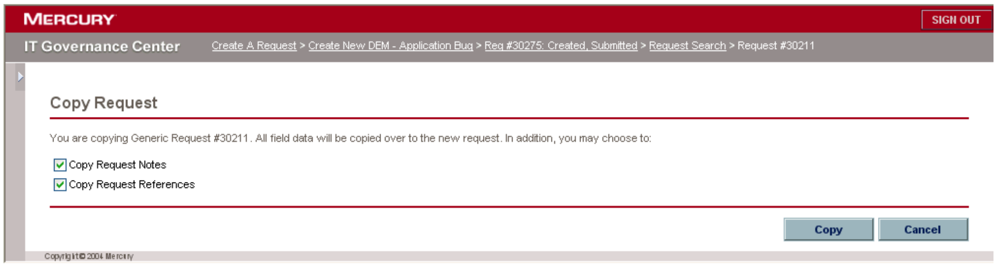
1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.
2. Open a request.

   To open an existing request, see *Opening and Updating Requests* on page 56. The request's detail page appears.

3. At the top or bottom of the request's detail page, click **Make a Copy.**

   The Copy Request page opens. All Header and Details fields are copied to the new request.



4. Select whether to copy the original request's Notes or the References sections and click **Copy.**

   The Create New Request page appears with the copied information.

5. Modify the Create New Request page as required and click **Submit.**

   The request is submitted.

Overview of Adding References

A request's detail page References section contains additional information concerning the request. For example, you might add a document or URL to a request. The following lists the references that can be added to a request:

- Attachment
- Package (New and Existing)
- Project
- Release
- Request (New and Existing)
- Task
- URL

For some references, such as for packages and other requests, a functional dependency to the original request can be created. For example, you can specify that a request is a predecessor to the package. This means the package will not continue until the request is closed. See *Request Detail Page, References Section* on page 29 for a list of the references and their possible dependency relationships.

Adding References

This section shows how to add an attachment as a reference. For information concerning how to add all of the valid references, see *Adding Additional References*.

To add a reference to a request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see Getting Started.

2. Open a request.

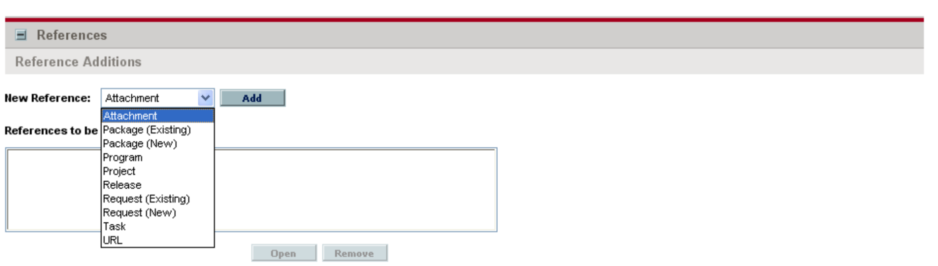
   You can open an existing request or create a new request from the menu bar.

   - To open an existing request, see *Opening and Updating Requests* on page 56.

   - To create a new request, see *Creating Requests from the Menu Bar* on page 38.

3. In the request, scroll down to the References section.

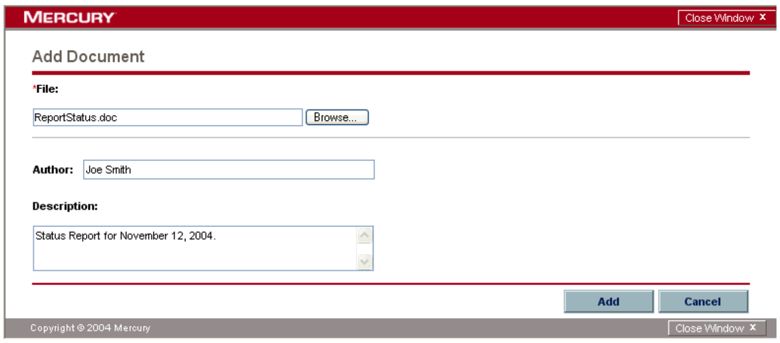
4. From the New Reference drop-down list, select the type of reference to be attached and click **Add.**



A window opens where the reference's relationship can be specified. This window is different depending on the type of reference selected. In this procedure, an Attachment is selected as a reference. For information concerning how to add other references, see *Adding Additional References*.

- To add an attachment as a reference, from the New Reference drop-down list, select **Attachment** and click **Add.**

  The Reference Attachment page appears.



5. In Attachment, use the **Browse** icon to search for and include an attachment.
6. In Description, enter a description of the attachment and click **OK.**

   The referenced attachment appears in the References section of the request's detail page.
7. In the request's detail page, click **Save.**

   The attachment is added to the request.

Adding Additional References

This section lists the different references that can be added to a request. For complete instructions on how to add a reference, see *Adding References* on page 44.

Adding Attachments as References

You can reference an attachment to a request. To reference an attachment, from the New Reference drop-down list, select **Attachment** and click **Add.** The Reference Attachment window opens. In Attachment, use the **Browse** icon to search for and include an attachment. In Description, enter a brief description of the attachment and click **Add** (see *Figure 3-11*). The attachment appears on the request's detail page. You must save or submit the request to add the reference.

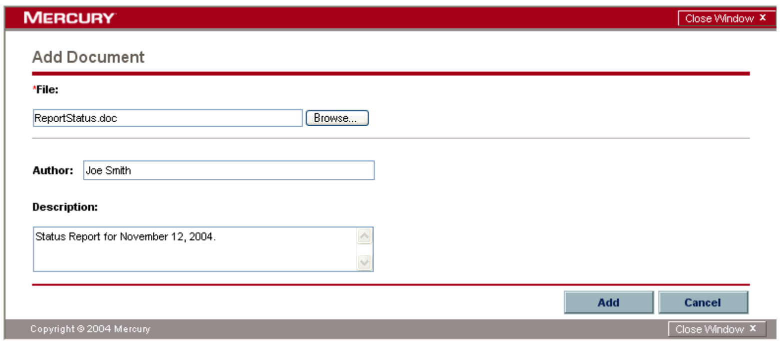


Figure 3-2. Add Document window

Adding Packages (Existing) as References

You can reference existing packages to a request. To reference an existing package, from the New Reference drop-down list, select **Package (Existing)** and click **Add.** The Add References: Package window opens. On the Add References: Package, complete the search fields as required click **Search.**

The Add References: Package window displays the package(s) matching the search criteria. A list of relationship types is included on the window (see *Figure 3-3*). Select the type of relationship, the package or packages, and click **Add.** The package appears on the request's detail page. You must save or submit the request to add the reference.

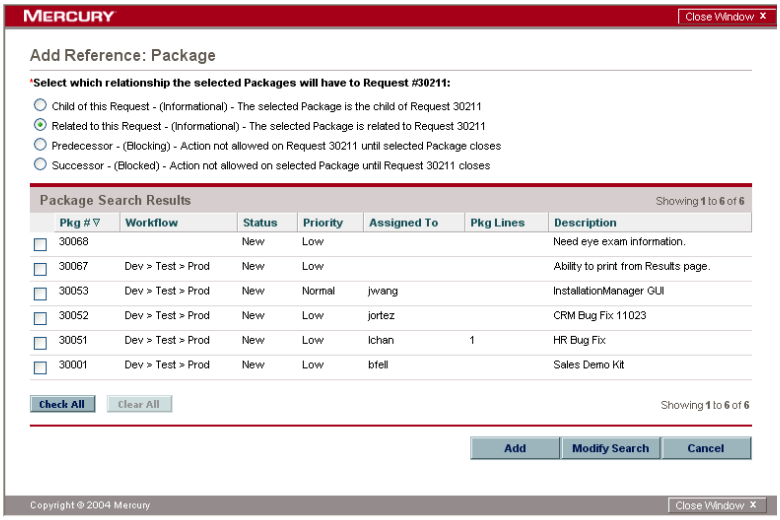


Figure 3-3. Add Reference Package window

Adding Packages (New) as References

You can reference a new package to a request. To reference a new package as a reference, from the New Reference drop-down list, select **Package (New)** and click **Add.** The Create New Package window opens. In the Create New Package window, select the relationship and click **Create.**

The New Package window opens. Any matching header information from the request is automatically added to the package, such as description, priority, and package type (see *Figure 3-4*). Complete the New Package window and click **Save.** The package appears on the request's detail page. You must save or submit the request to add the package.

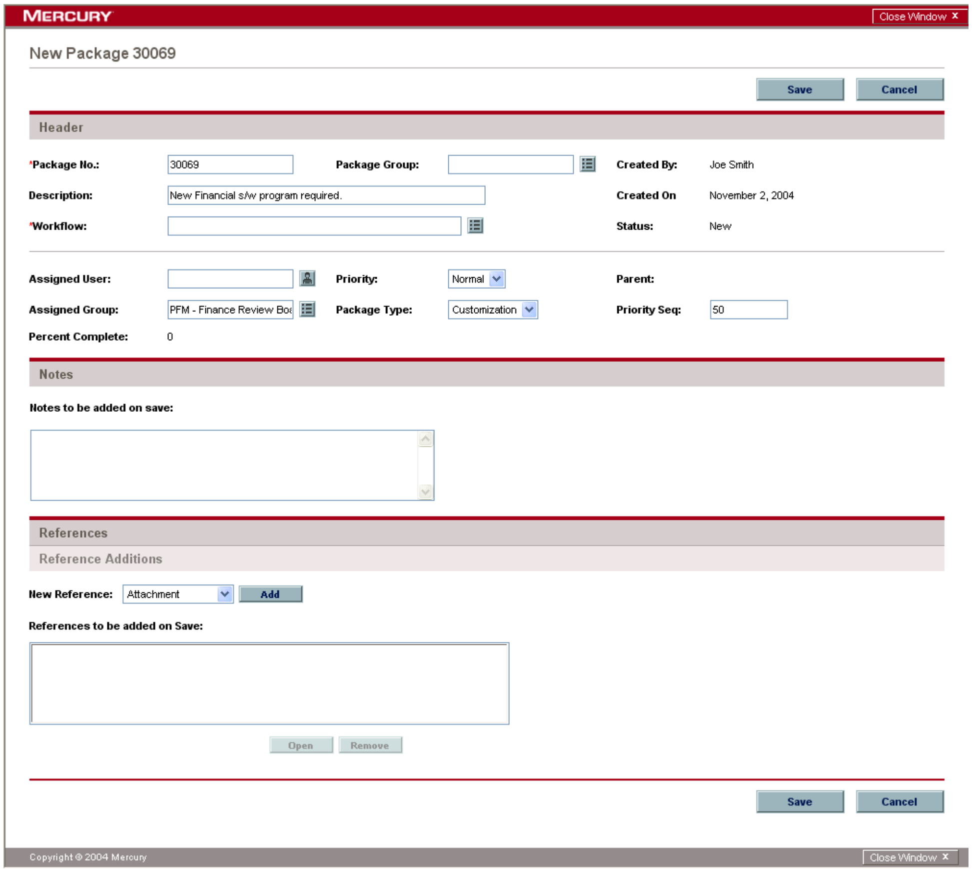


Figure 3-4. New Package window

Attaching Programs as References

You can reference existing programs to a request. To reference an existing program, from the New Reference drop-down list, select **Program** and click **Add.** The Reference: Program window opens. Select the program from the auto-complete list. In the Reference: Program window, select the type of program relationship and click **Add** (see *Figure 3-5*).

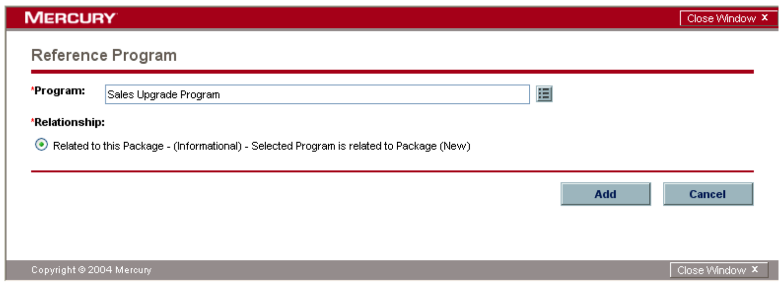


Figure 3-5. Reference Program window

Attaching Projects as References

To attach existing projects as a reference, from the New Reference drop-down list, select **Project** and click **Add.** The Add Reference: Project window opens. In the Add Reference: Project window, complete the search fields as required and click **Search.**

The Add Reference: Project window displays the projects matching the search criteria. A list of relationship types is included on the page (see *Figure 3-3*). In the Add Reference: Project window, select the type of relationship, the project, and click **Add.** The project appears on the request's detail page. You must save or submit the request to add the reference.

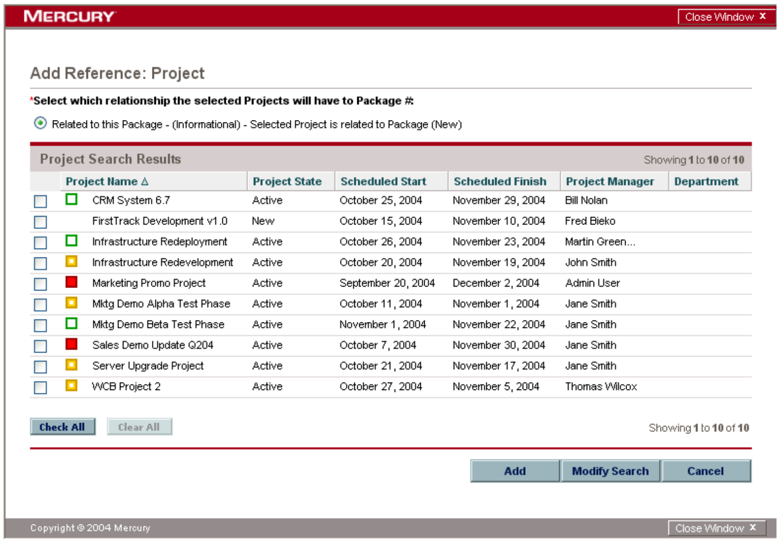


Figure 3-6. Add Reference Project window

Adding Releases as References

You can reference existing releases to requests. To reference an existing release, from the New Reference drop-down list, select **Release** and click **Add.** The Reference Release window opens. In Release, select the release from the auto-complete list. In the Reference Release window, select the type of relationship and click **Add** (see *Figure 3-3*). The release appears on the request's detail page. You must save or submit the request to add the reference.

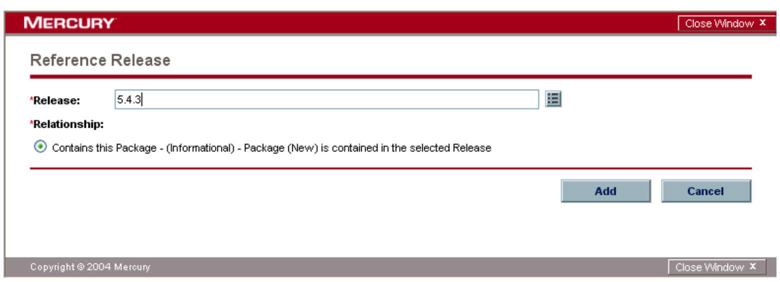


Figure 3-7. Reference Release window

Adding Requests (Existing) as References

You can reference existing requests to requests. To reference an existing request, from the New Reference drop-down list, select **Request (Existing)** and click **Add.** The Add Reference: Request window opens. In the Add Reference: Request window, complete the search fields as required click **Search.**

The Add Reference: Request window displays the requests matching the search criteria. A list of relationship types is included (see *Figure 3-8*). Select the type of relationship, the existing request or requests, and click **Add.** The existing request or requests appear on the request's detail page. You must save or submit the request to add the reference.

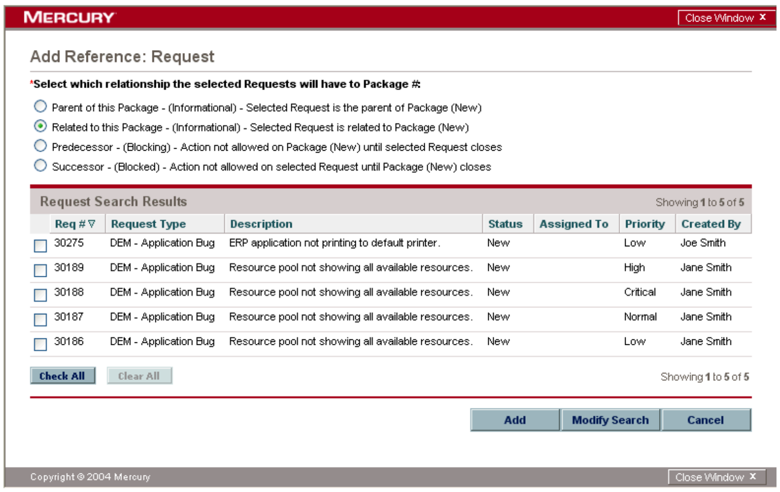


Figure 3-8. Add Reference Request window

Adding Requests (New) as References

You can reference new requests to a request. To reference a new request, from the New Reference drop-down list, select **Request (New)** and click **Add.** The Create New Request window opens. In Request Type, select the type of request to create. In the Create New Request window, select a relationship and click **Create** (see *Figure 3-9*).

The Create New Request window displays the fields of the selected request type. Complete the Create New Request window as required and click **Save** or **Submit.** The new request appears on the initial request's detail page. You must save or submit the request to add the reference.

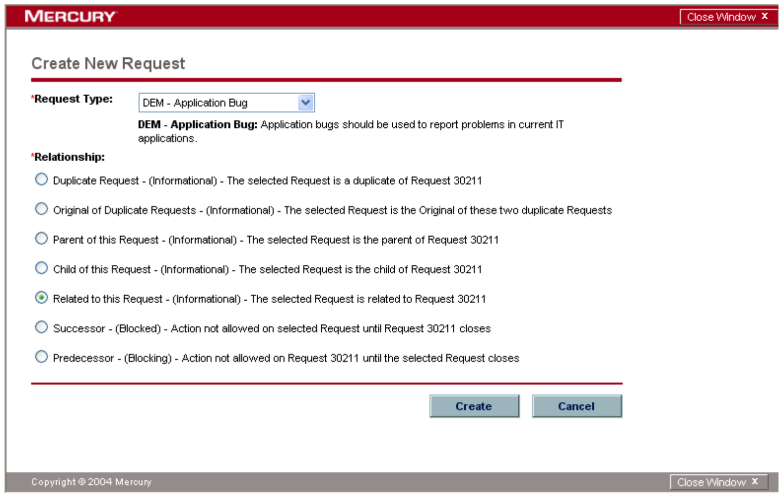


Figure 3-9. Create New Request window

Adding Tasks as References

You can reference existing tasks to requests. To reference an existing task, from the New Reference drop-down list, select **Task** and click **Add.** The Add Reference: Task window opens. In the Add Reference: Task window, complete the search fields as required click **Search.**

The Add Reference: Task window displays the tasks matching the search criteria. A list of relationship types is included (see *Figure 3-10*). In the Add Reference: Task window, select the type of relationship, the existing task or tasks, and click **Add.** The existing task or tasks appear on the request's detail page. You must save or submit the request to add the reference.

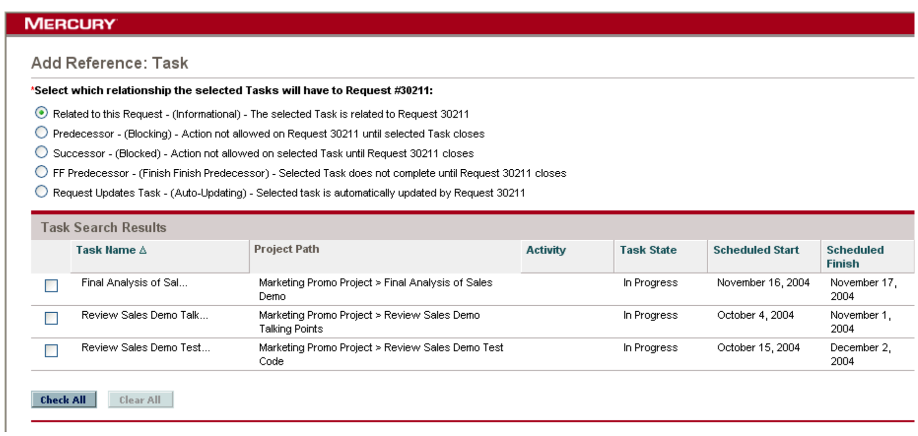


Figure 3-10. Add Reference Task window

Adding URLs as References

You can reference an existing URL to a request. To reference an existing URL, from the New Reference drop-down list, select **URL** and click **Add.** The Reference URL window opens. In URL, enter the URL address. In Description, enter a brief description of the URL and click **Add** (see *Figure 3-11*).

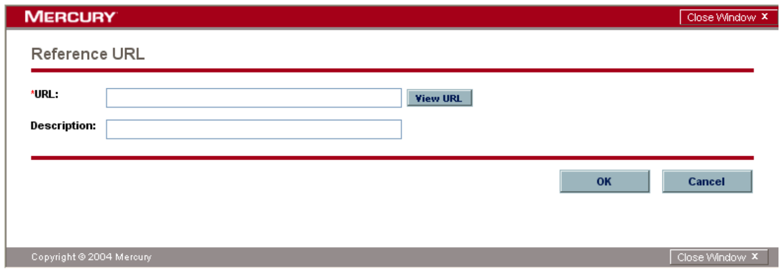


Figure 3-11. Reference URL window

The URL appears on the request's detail page. You must save or submit the request to add the reference.

Chapter

4

Processing and Managing Requests

In This Chapter:

Overview of Processing and Managing Requests

In Mercury Demand Management, once a request has been created it can be processed and managed. Processing requests refers to updating requests and moving requests through workflow steps. Managing requests refers to working with the requests, such as printing and purging requests.

You can locate requests requiring attention using one of the following methods:

- **Viewing Portlets.** Personalize Mercury Demand Management request portlets to display requests assigned to you. For more information, see the *Getting Started* guide.
- **Performing Searches.** Use the Search Requests page to search for requests. For more information, see the *Getting Started* guide.
- **Receiving Notifications.** As a request proceeds through its life, email notifications can be sent to alert you of pending actions. The notification might include a link to the request. Click the link to open the referenced request. If you are currently logged onto the standard interface, the referenced request opens. If you are not currently logged onto the standard interface, the Logon page opens. After you log on, the referenced request appears. Request types can be configured to send email notifications when:
  - A request reaches a specific workflow step
  - When a specific field changes its value

Opening and Updating Requests

If you have the correct permissions, you can open and updated Mercury Demand Management request. Opening and updating a Demand Management request can involve:

- Opening a request
- Updating or changing the information in a request field
- Adding notes or references to a request
- Performing an available action

Opening Requests Using Portlets

Mercury Demand Management request portlets include links to the request's detail page. In the Mercury Demand Management portlet, click a linked Request # to open the request's detail page.

Opening Requests Using Email Notifications

Some workflow steps are configured to send email notifications when they become active. Most email notification include a link to the request. Click the link to open the request. If you are currently logged onto the standard interface, the referenced request opens. If you are not currently logged on to the Mercury IT Governance Center, the Mercury IT Governance Center Logon page appears. After you log on, the referenced request opens.

Opening Requests Using the Menu Bar

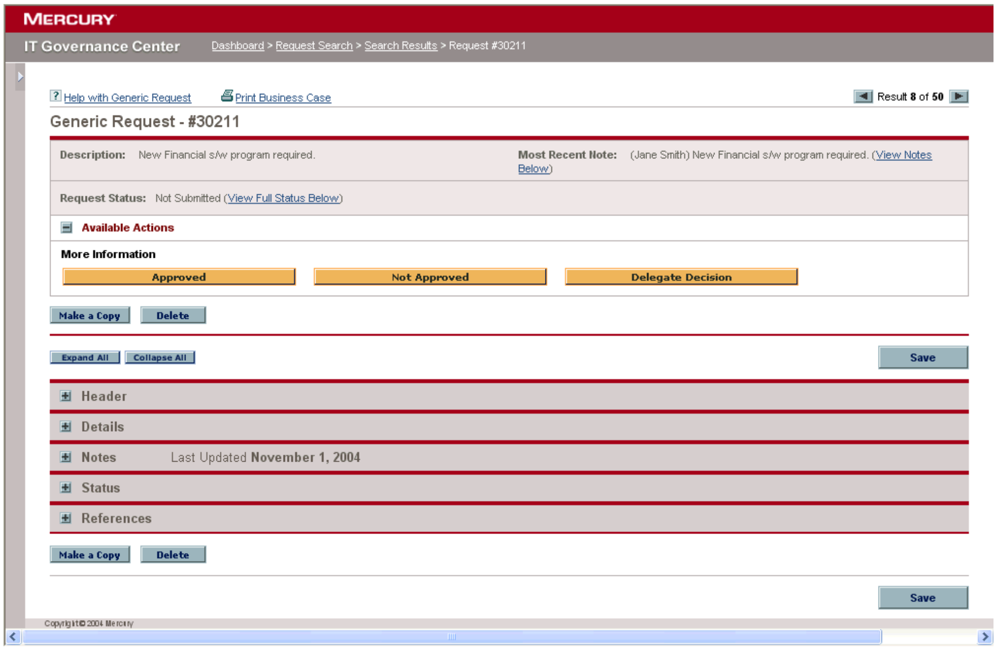
To open and update a request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Use the Search Requests page to search for and open a specific request.

   For information on how to use the Search Request page, see the *Getting Started* guide. The request's detail page appears.



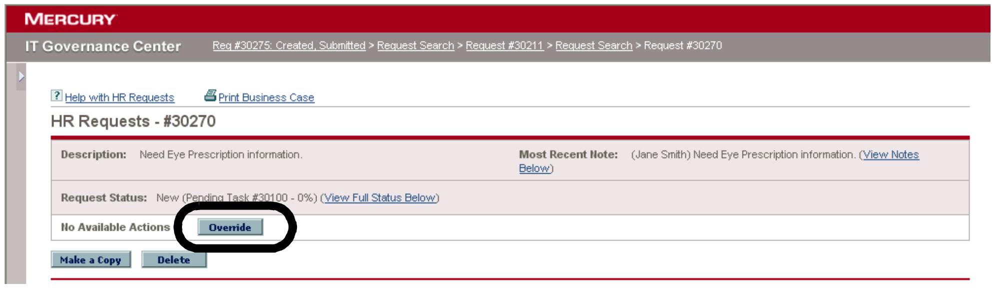
3. In the Available Actions section, select the appropriate action.

   If you have the appropriate permissions to act on an eligible step, the available action appears in the Available Actions section. Some actions, such as **Accept** and **Reject**, usually move the request to another step in the process (workflow).

   Some actions, such as **Assign Resource** or **Delegate Decision,** require additional information. When additional information is required, a workflow step action page will appear. If a workflow step action page appears, complete the page or pages to complete the action.

   Some actions will change the status of a field. For example, a disabled field might become enabled or required (red asterisk). Check the Header and Details sections for newly enabled or required fields.

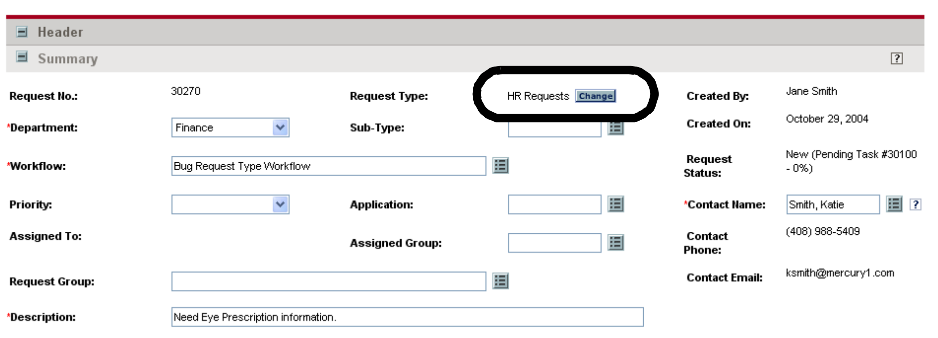
   Reference relationships make it possible for a request to wait until another request (or other referenced entity) is complete. If the request has such a reference relationship, an **Override** button appears in the Available Actions section. Click **Override** to override the referenced relationship and allow the request to continue through the workflow.



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

   The Header section includes general information concerning the request. Required fields have a red asterisk. All other fields are optional. For information concerning a specific field, click the **Help** icon next to the field (if available).

   If necessary, you can change the request type, such as changing a **Bug** request to an **Enhancement** request. Changing the type of request can involve changing which fields are associated with the request. To reduce data entry when the request type is changed, Demand Management maps the fields from the original request type to the fields of the new request type. New fields appear blank. To change the request type, next to the Request Type field, click **Change.**



5. In the Details section, complete the fields as required.

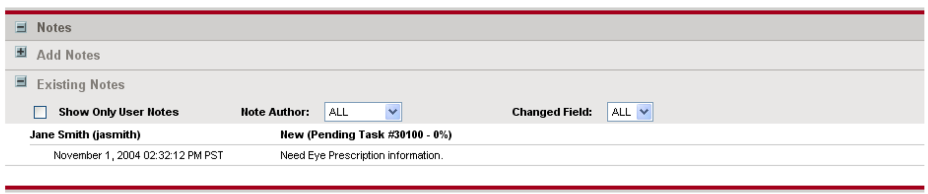
   The Details section includes specific information concerning the request. The Details section can have none, one, or many subsections. Required fields have a red asterisk. For information concerning a specific field, click the **Help** icon next to the field.

6. In the Notes section, enter additional information.

   The Notes section contains fields where notes and information concerning the request can be entered and stored. To add a note, in the Add Note section, enter the data. When the request is saved, the note is added.

   View existing notes in the Existing Notes section. Existing notes are presented in chronological order with the most recent notes first. Existing notes can also be filtered, using Show Only User Notes, Note Author, and Changed Fields.

   You cannot delete an existing note.



7. In the Status section, review the status of the request.

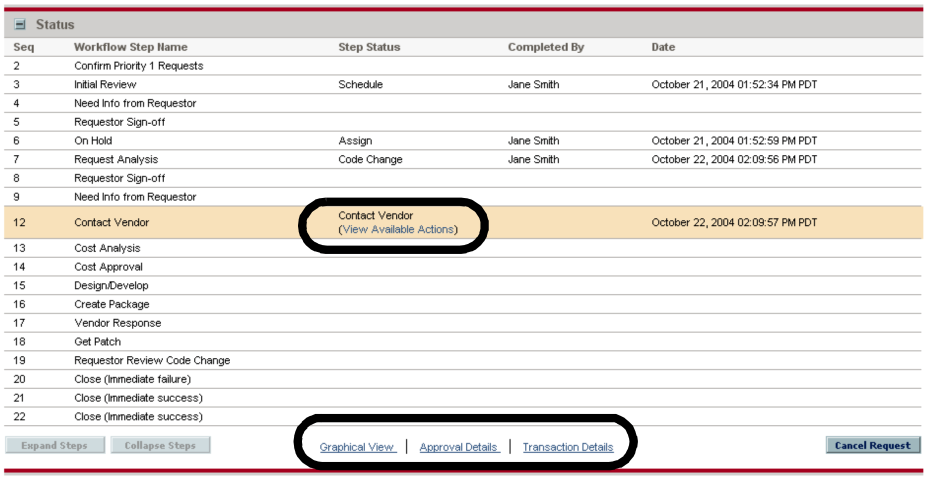
   The Status section lists all of the workflow steps and each workflow step's status. The current workflow step is highlighted.

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

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

   If the workflow step is an execution workflow step, there might be a linked Request Execution Log. To view the Request Execution Log for a particular workflow step, click **log** in the Step Status column.

If you have the appropriate permissions to act on an eligible step, a **View Available Actions** link appears in the Step Status column. Click the link to display the workflow step's action page. The actions in the workflow step's action page are the same actions found in the title section of the request. Complete the action to move the request to the next workflow step.



Status

Seq	Workflow Step Name	Step Status	Completed By	Date
2	Confirm Priority 1 Requests			
3	Initial Review	Schedule	Jane Smith	October 21, 2004 01:52:34 PM PDT
4	Need Info from Requestor			
5	Requestor Sign-off			
6	On Hold	Assign	Jane Smith	October 21, 2004 01:52:59 PM PDT
7	Request Analysis	Code Change	Jane Smith	October 22, 2004 02:09:56 PM PDT
8	Requestor Sign-off			
9	Need Info from Requestor			
12	Contact Vendor	Contact Vendor (View Available Actions)		October 22, 2004 02:09:57 PM PDT
13	Cost Analysis			
14	Cost Approval			
15	Design/Develop			
16	Create Package			
17	Vendor Response			
18	Get Patch			
19	Requestor Review Code Change			
20	Close (Immediate failure)			
21	Close (Immediate success)			
22	Close (Immediate success)			

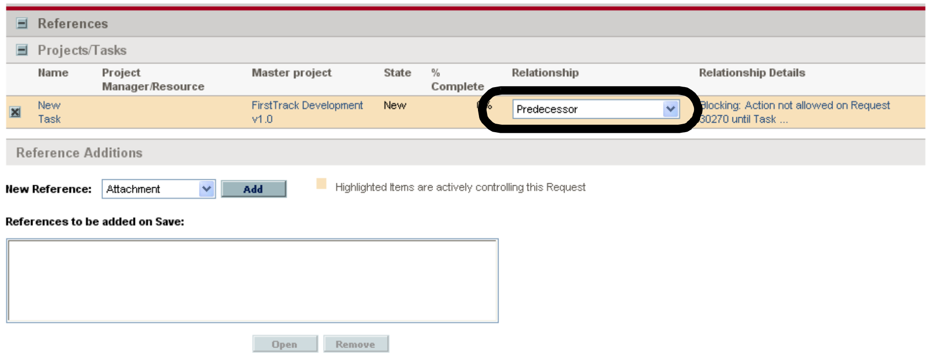
Expand Steps | Collapse Steps | Graphical View | Approval Details | Transaction Details | Cancel Request

8. In the References section, add references to the request.

   Existing references can be viewed in subsections of the References section. Existing references are grouped by entity, such as referenced requests are in the Requests section.

   To change the relationship of an existing reference, from the Relationship drop-down list, select the new relationship. To delete a reference, click the **Delete** icon at the beginning of the existing reference.

   In some cases it might be useful to reference a Web-accessible file or a document or file from a local machine to the request. Additionally, other entities such as packages, tasks, or other requests can be referenced to the request. For information on adding references, see *Adding References* on page 44.



9. On the request's detail page, click **Save.**

   The changes to the request are saved.

Managing Requests

In Mercury Demand Management, once a request has been submitted, it can be viewed, changed, or deleted depending on changes to the business requirements or workflow.

Reopening Closed Requests

A request can be reopened at a preconfigured step in the process. For example, if a **Bug** request is closed and the bug reoccurs, the request can be reopened.

To reopen a request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

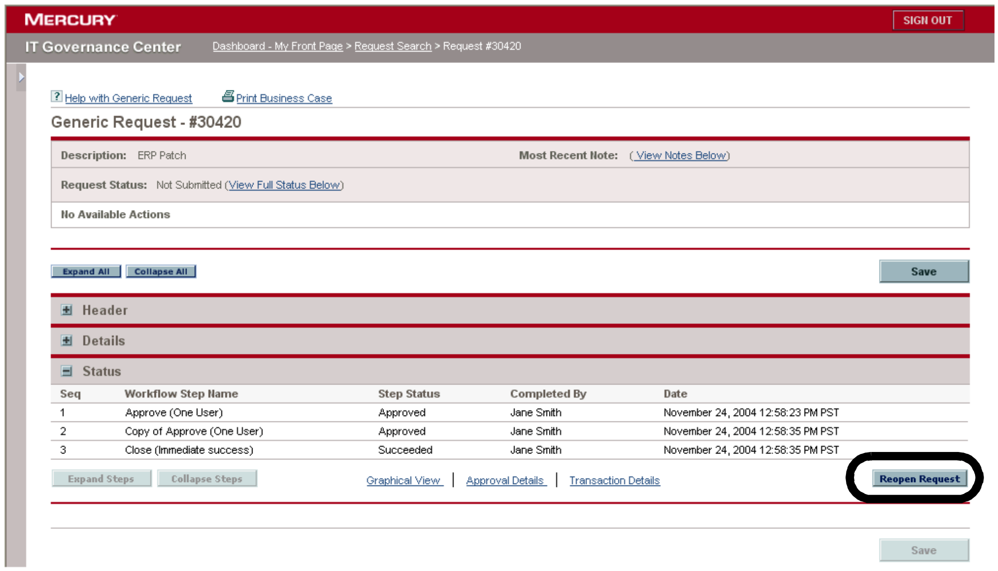
2. Search for and open the closed request.

   For information on how to search for and open a request, see *Opening and Updating Requests*. The request's detail page appears.

3. In the request's detail page, scroll down to the Status section.

4. In the Status section, click **Reopen Request.**

   The request is reopened.



Deleting Requests

Only saved requests can be deleted from the Mercury IT Governance Center. In order to delete a saved request, you must have the proper permissions. Deleted requests are deleted from the Mercury IT Governance Center and can no longer be opened or viewed.

To delete a request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Search for and open the request.

   For information on how to search for and open a request, see *Opening and Updating Requests*. The request's detail page appears.

3. Scroll to the bottom of the request’s detail page.

   If you have the appropriate permissions to delete the request, the **Delete** button will be visible.

4. At the bottom of the request’s detail page, click **Delete.**

   A question dialog opens prompting for a confirmation on the deletion.

5. Click **OK** to delete the request.

   The request is deleted from the Mercury IT Governance Center.

Cancelling Requests

Only saved requests can be cancelled from the Mercury IT Governance Center. In order to cancel a saved request, you must have the proper permissions.

To cancel an existing request:

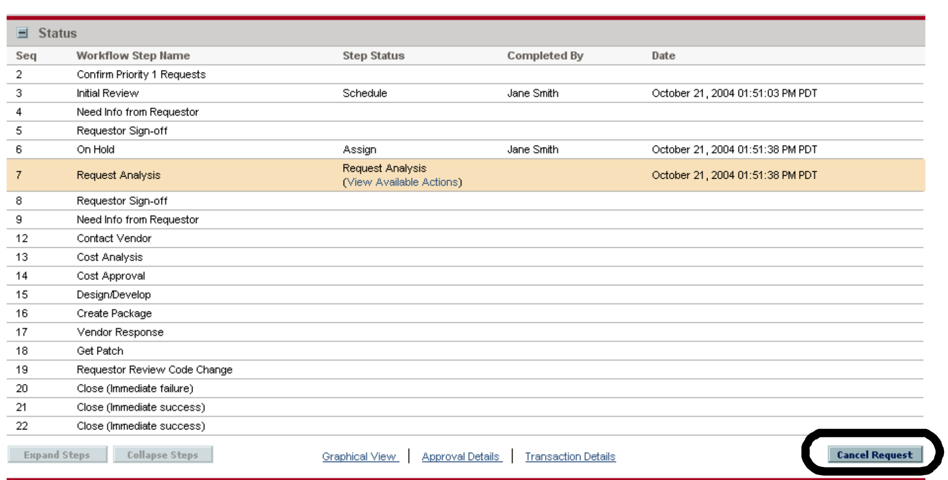
1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Search for and open the request.

   For information on how to search for and open a request, see *Opening and Updating Requests*. The request’s detail page appears.

3. In the request’s detail page, scroll down to the Status section.



4. In the Status section, click **Cancel Request.**

   A question dialog opens prompting for a confirmation of the cancellation.

5. Click **OK** to cancel the request.

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

Printing Requests

It is possible to print a request's detail page by opening a printable version of the request. The printable version of the request's detail page cannot be edited or updated.

To print a request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Search for and open the request.

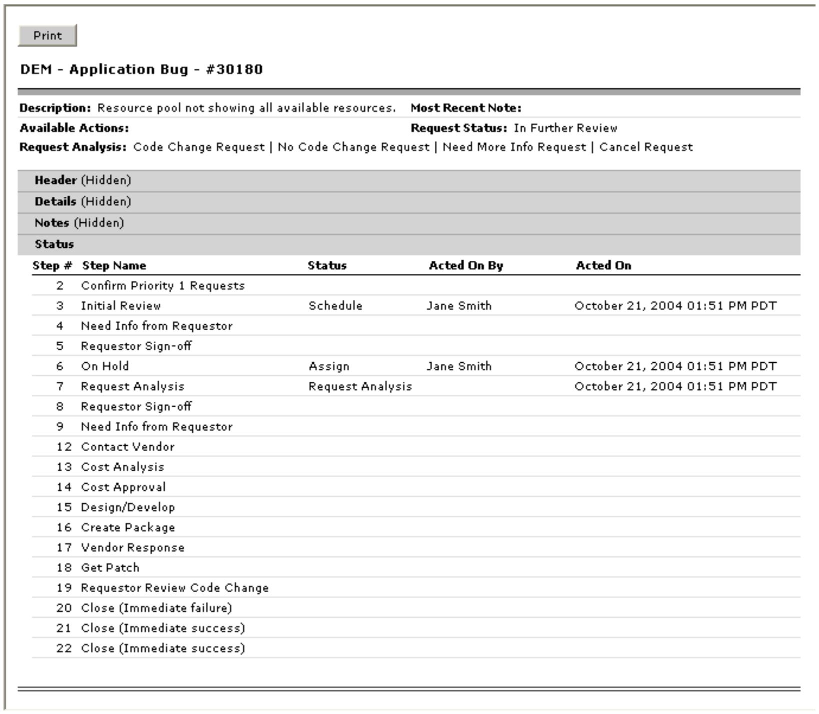
   For information on how to search for and open a request, see *Opening and Updating Requests*. The request's detail page appears.

3. At the top of the request's detail page, click the **Print Business Case** link.

   A printable version of the request's detail page opens in a separate page.

4. On the printable version of the request's detail page, click **Print.**

   The printable version of the request's detail page is sent to the printer.



Purging Requests

It is possible to delete multiple requests at the same time. To delete multiple requests, you must have the correct permissions. Purged requests are deleted from the Mercury IT Governance Center and can no longer be opened or viewed.

To purge multiple requests:

1. Log on to the Mercury IT Governance Center.

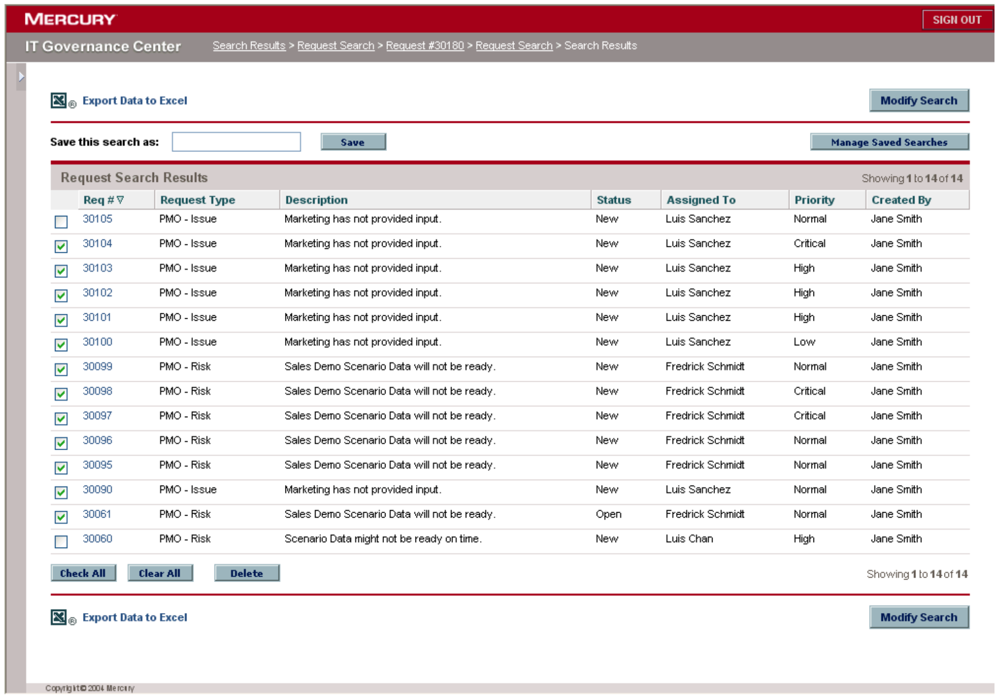
   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Search for the requests to purge.

   For information on how to search for requests, see the *Getting Started* guide. The search results page appears.

3. On the search results page, select the requests to purge.

   To select all of the requests, click **Check All.**



4. On the search results page, click **Delete.**

   The requests are deleted from the Mercury IT Governance Center.

Managing Requests Using Reports

Demand Management includes a predefined set of reports. These Demand Management reports display the status of the request's activity at any point in time. *Reports by Category* on page 81 lists the Demand Management reports.

Managing Requests Using Portlets

Information regarding requests can be organized and presented using the Mercury Demand Management request portlets. Mercury does not supply a preconfigured Demand Management request Dashboard page. *Figure 4-1* shows all of the Demand Management request portlets on a single Dashboard page. See *Demand Management Portlets* on page 79 for a complete list of the Demand Management request portlets.

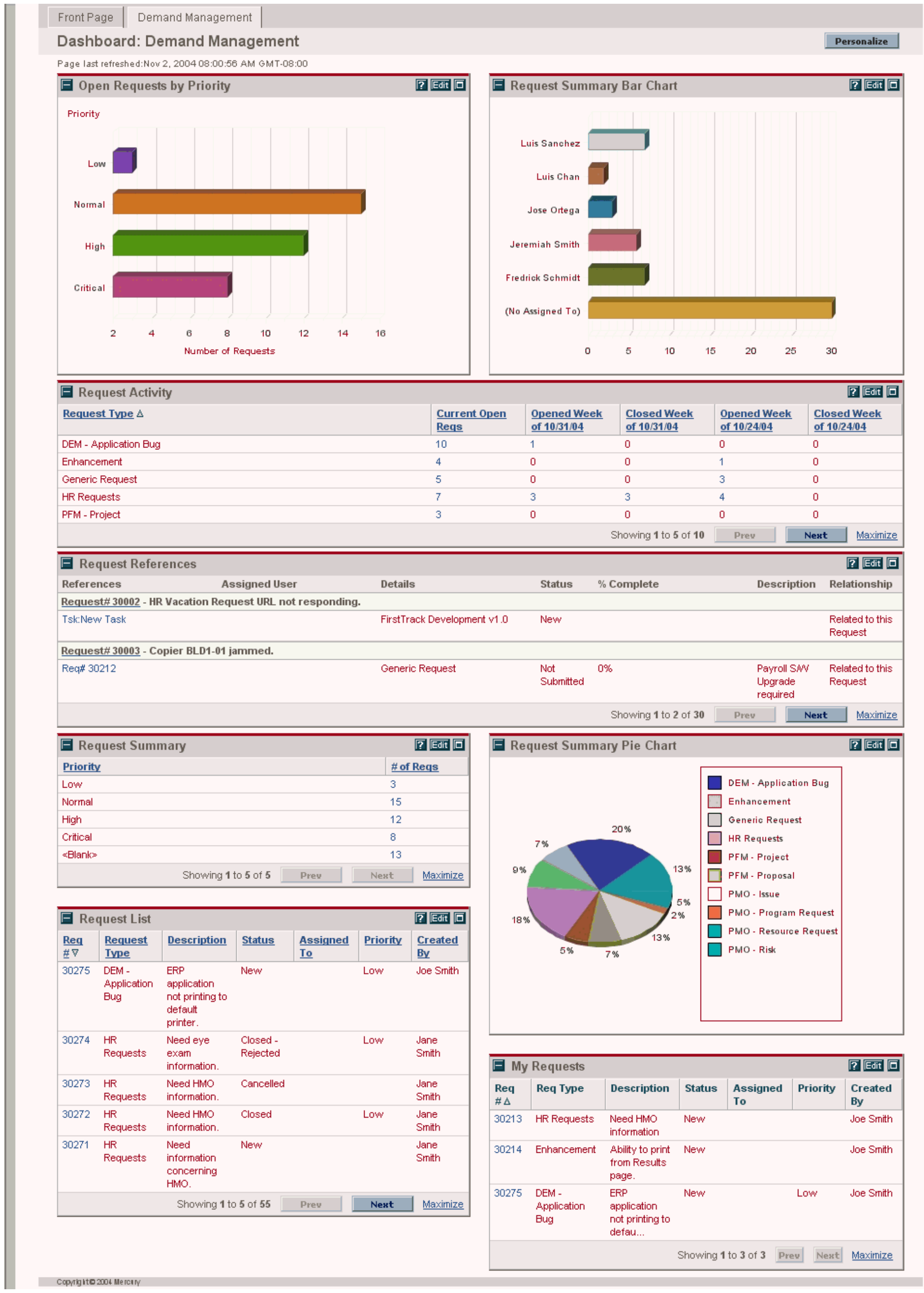


Figure 4-1. Demand Management request portlets

Chapter

5

Integrating Requests and Projects

In This Chapter:

Overview of Integrating Requests and Projects

Customers with both Mercury Demand Management and Mercury 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 Mercury Demand Management also gives instant visibility to detailed activities supporting an overall project. The following lists the possible relationships between projects, tasks, and requests.

- **Reference Projects to Requests.** Projects can be linked to new and existing requests using the **References** tab in the project's information window.
- **Reference Tasks to Requests.** Tasks can be linked to new and existing requests using the **References** tab in the task's information window.
- **Reference Projects from Requests.** Existing projects can be referenced from requests using the **References** tab in the request. For information on how to reference a project from a request, see *Overview of Adding References* on page 43.
- **Reference Tasks from Requests.** Existing tasks can be referenced from requests using the **References** tab in the request. For information on how to reference a task from a request, see *Overview of Adding References* on page 43.

When integrating requests and projects, functional dependencies are created between the two entities. For example, you can specify that a request is a predecessor to the package. This means the package will not continue until the request is closed. *Table 5-1* lists the dependencies that can be created between requests and tasks.

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.
	Predecessor	(Blocking) - Action not allowed on the request until the selected task closes.
	Successor	(Blocked) - Action not allowed on selected task until request closes.
	FF Predecessor	(Finish Finish Predecessor) - The selected task does not complete until the request closes.
	Request Updates Task	(Auto-Updating) - The selected task is automatically updated by 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 the 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.
	Predecessor	(Blocking) - Action not allowed on the task until the selected request closes.
	Successor	(Blocked) - Action not allowed on selected request until task closes.
	FF Predecessor	(Finish Finish Predecessor) - The selected request does not complete until the task closes.
	Request Updates Task	(Auto-Updating) - The selected request is automatically updated by the task.

For More Information

For more information concerning relationships, see *Request Detail Page, References Section* on page 29.

Referencing Requests from Tasks

To reference a request from a task:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Open the Workbench.

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

3. From the shortcut bar, select **Project Mgmt > Project.**

   The Project Workbench opens.

4. From the Project Workbench, open a project.

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

5. From the Project window, select a task and click **Edit.**

   The Task Information window opens.

6. In the Task Information window, select the **References** tab.

   The **References** tab opens.

7. In the **References** tab, in the New Reference field, select **Request (Existing)** or **Request (New)** from the drop-down list and click **Add.**

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

   a. In the New Reference - Request (Existing) window, in the Request No field, select the request or requests using auto-complete.

   b. Select the relationship between the task and the request and click **OK.**

   c. The request is referenced to the task. The New Reference - Request (Existing) window closes. The Task Information window opens.

- If you selected **Request (New),** the New Reference - Request (New) window opens.

   a. In the New Reference - Request (New) window, in the Request Type field, select the request type using auto-complete.

   b. Select the relationship between the task and the request and click **Create.**

      The Create New Request window opens.

   c. In the Create New Request window, complete the fields and click **Submit.**

      The request is referenced to the task. The Task Information window opens.

8. In the Task Information window, click **OK.**

   The request is referenced to the task. The Task Information window closes. The Project window opens.

9. In the Project window, click **OK.**

   The changes to the project are saved.

Referencing Requests from Projects

To reference a request from a task:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Open the Workbench.

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

3. From the shortcut bar, select **Project Mgmt > Project.**

   The Project Workbench opens.

4. From the Project Workbench, open a project.

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

5. From the Project window, select a project and click **Edit.**

   The Project Information window opens.

6. In the Project Information window, select the **References** tab.

   The **References** tab opens.

7. In the **References** tab, in the New Reference field, select **Request (Existing)** or **Request (New)** from the drop-down list and click **Add.**

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

     a. In the New Reference - Request (Existing) window, in the Request No field, select the request or requests using auto-complete.

     b. Select the relationship between the task and the request and click **OK.**

     The request is referenced to the task. The New Reference - Request (Existing) window closes. The Project Information window opens.

   - If you selected **Request (New),** the New Reference - Request (New) window opens.

     a. In the New Reference - Request (New) window, in the Request Type field, select the request type using auto-complete.

     b. Select the relationship between the task and the request and click **Create.**

     The Create New Request page opens.

     c. In the Create New Request page, complete the fields and click **Submit.**

     The request is referenced to the task. The Project Information window opens.

8. In the Project Information window, click **OK.**

   The request is referenced to the task. The Project Information window closes. The Project window opens.

9. In the Project window, click **OK.**

   The changes to the project are saved.

Creating Tasks from Requests

Occasionally, a request might be submitted that should also be a task. Creating a task from a request adds a deliverable date and actuals that can be tracked to the request.

Tasks are created from requests using the Project Management Workbench. A task created from a request behaves like any other task in the project, except that the tasks's % Complete and State are automatically updated by the originating request as it moves through its workflow. The new task has the dependency relationship Task Updated by Request.

To create a task from a request:

1. Log on to the Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

2. Open the Workbench.

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

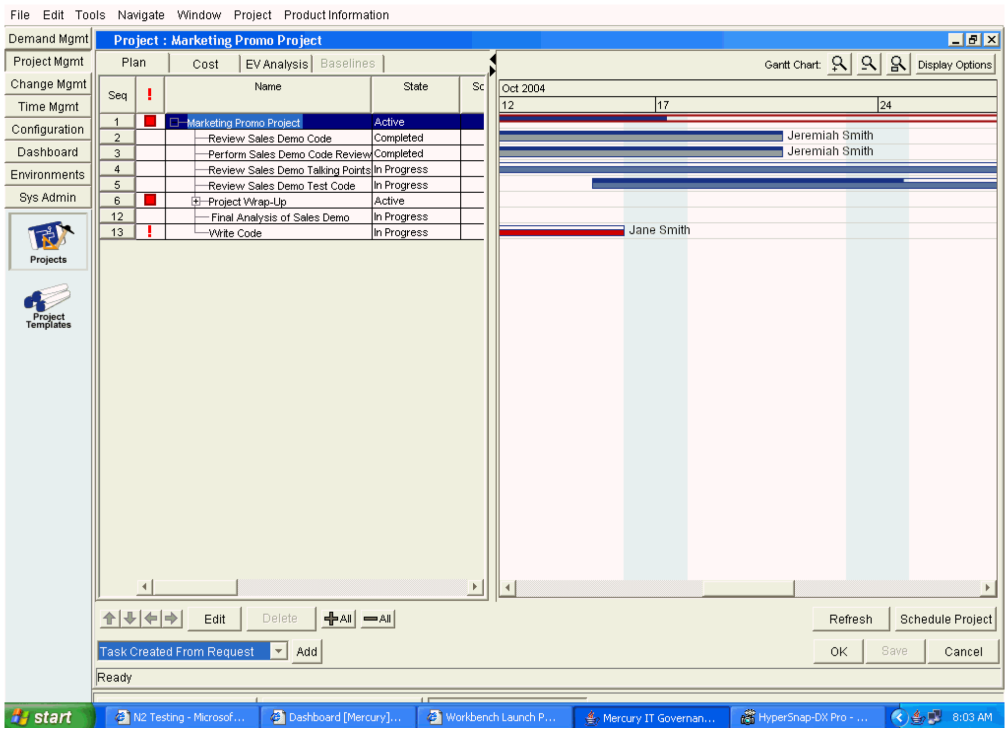
3. From the shortcut bar, select **Project Mgmt > Project.**

   The Project Workbench opens.

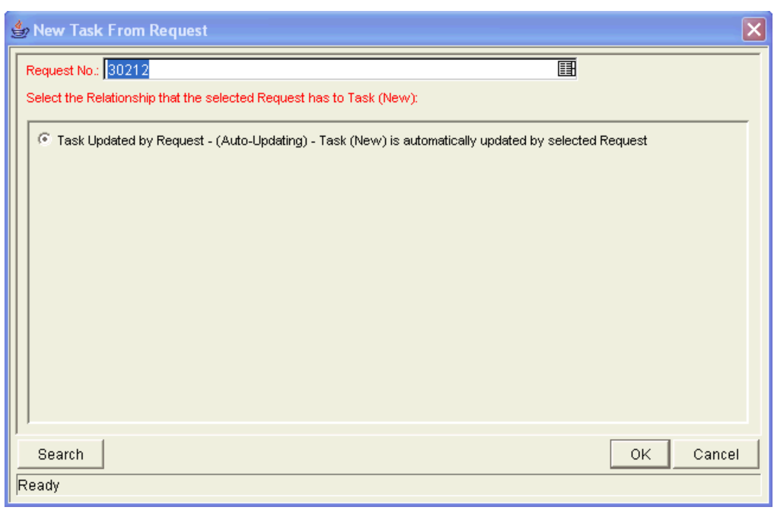
4. From the Project Workbench, open a project.

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

5. From the Project window, in the lower-left corner of the window, select **Task Created From Request** from the drop-down list.



The New Task From Request window opens.



6. In the New Task From Request window, select the request to attach.

   You can select a request in one of the following ways:

   - In the Request No. field, enter the number of the request and click **OK.**
   - In the Request No. field, select the request or requests using auto-complete and click **OK.**

7. In the New Task From Request window, click **OK.**

   The new task is created from the selected request and is part of the current project. The task is linked to the request.

8. Click **OK** to create the new task and close the window.

   The new task has been created from the selected request and is part of the current Project. The task is linked to the request.

9. In the Project window, click **OK.**

   The changes to the project are saved.

Dependencies Between Tasks and Requests

The dependencies that can be created between requests and tasks are described in *Table 5-2*.

Table 5-2. Dependency Relationships - Requests to Tasks

Relationship	Description
Related to this Task	(Informational) - Selected Request is related to the Task.
Successor	(Blocking) - Action not allowed on selected Request until the Task closes.
Predecessor	(Blocking) - Action not allowed on the Task until the selected Request closes.
FF Predecessor	(Finish Finish Predecessor: Blocking) - The Task and Request complete together.
Task Updated by Request	(Auto-Updating) The Task is automatically updated by the selected Request.

Visibility into Tasks and Requests

You can search for requests that are holding up progress on your projects. Each portlet in the Dashboard that deals with requests includes the field Preventing Action on Requests/Tasks. This field can be set to display requests that are preventing action on other requests or tasks.

You can also view references related to your tasks and projects using the Project References Portlet on your Dashboard. Add the portlet to your Dashboard and then personalize it to show the references that are relevant to your activities. The portlet can be personalized to display references based on the following information:

- Reference types
- Relationship
- Time period when they were added
- Whether they are preventing actions on tasks

Appendix

A

Demand Management Portlets

Information regarding Demand Management portlets can be organized and presented using the Mercury Demand Management request portlets. Mercury does not supply a preconfigured Demand Management request Dashboard page. See *Table A-1* for a complete list of the Demand Management request portlets.

Table A-1. Demand Management portlets for requests

Portlet	Description
My Requests	Lists all requests created by or assigned to you. Provides a critical view into the most pressing requests nearing deadlines.
Open Requests by Priority	Bar chart of the number of requests currently open, grouped by priority. Provides a graphical representation of a business' open issues.
Request Activity	Lists general activity information such as the number of requests opened and closed during the last two weeks. Provides visibility into high traffic request types as well as the groups or users assigned to address them.
Request List	Lists general information about requests, such as their description and status. Can filter information based on specific request numbers or other request related criteria.

Table A-1. Demand Management portlets for requests [continued]

Portlet	Description
Request References	List the references attached to a request. Can filter based on reference types, relationship, and the time period when they were added.
Request Summary	Lists information about groups of requests, such as: • Priority • Type • Status • Total number of requests for each category
Request Summary Bar Chart	Bar chart summary of requests. Click on a bar to return a list of requests the bar represents.
Request Summary Pie Chart	Pie chart summary of requests. Click on a slice to return a list of requests the slice represents.

Appendix

B

Reports by Category

In This Appendix:

Overview of Report Categories

Reports available through the Mercury IT Governance Center standard interface are listed (by category) and described in the following sections.

Note

Another type of report in Mercury IT Governance Center (not discussed in this document) are server reports, which are submitted and viewed from the Workbench interface, For information about server reports, see the *System Administration Guide and Reference*.

Administrative Reports

The administrative reports (listed in *Table B-1*) are available to users with an administration license.

Table B-1. Administrative reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. This report is also in the Resource category.
Environment Comparison	Helps audit environment definitions when different environments (for example, development and production) are similar to each other.
Environment Detail	Lists the detailed definitions of a given environment or group of environments, the major attributes of the environments, and the attributes of applications tied to the environments.
Environment Group Detail	Contains detailed information about specified environment groups.
Import Requests	Imports requests into Demand Management request tables, moves the requests to the appropriate status, and reports on the results of the execution. For more information about this report, see the *Open Interface Guide and Reference*.

Table B-1. Administrative reports [continued]

Report	Definition
Import Users	Imports data from the user interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Lookup Types	Provides information about one or more lookups.
Notification History	Provides information about notifications that have been sent or are pending.
Object Type Detail	Lists all parameters and commands associated with a given object type.
Portlet Detail	Provides information about a portlet or range of portlets.
RCS Check In	Template of a report used to check files into the RCS repository (if the RCS file management system is being used).
RCS Check Out	Template of a report used to check files out of the RCS repository (if the RCS file management system is being used).
Report Type Detail	Provides information about report type definitions.
Request Header Type Detail	Lists detailed definitional information for request header types.
Request Type Detail	Lists detailed definitional information for request types.
Run Field Security Denormalization	Runs field level security-related denormalization tasks for particular entities.
Run ITG Organization Unit Interface	Imports data from the organization unit interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Run ITG Package Interface	Validates and loads package data from the package open interface tables into the standard Mercury Change Management data model. For more information about this report, see the *Open Interface Guide and Reference*.
Run Workflow Transaction Interface	Validates and runs workflow transactions based on data in the workflow open interface tables. For more information about this report, see the *Open Interface Guide and Reference*.
Security Group Detail	Lists definitional information for one or more security groups.

Table B-1. Administrative reports [continued]

Report	Definition
Special Command Detail	Provides details for a command (special command) or a range of commands.
Synchronize Meta Layer	Assesses or synchronizes the RML (Reporting Meta Layer).
User Data Detail	Displays the definition of custom user data field (for example, fields on entities like packages, requests, workflows, and security groups).
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is also in the Resource category.
Validations	Provides information about the various custom validations that have been entered into the system as well as those that are standard with Mercury IT Governance Center products.
Workflow Detail	Provides detailed definitional information about specific workflows or sets of workflows.
Workflow Statistics	Given a date range and a workflow (or a range of workflows), this report provides statistical information regarding workflow usage.

For More Information

Unless otherwise indicated in *Table B-1*, see the *Reports Guide and Reference* for more information about Administrative reports.

Change Management Reports

The Change Management reports (listed in *Table B-2*) are available to users with a Mercury Change Management application license.

Table B-2. Change Management reports

Report	Definition
Compare Custom Database Setup	Runs custom database comparisons.
Compare Filesystem Environment	Compares the files and file structures of two machines.
Compare MS SQL Server 7 Environments	Compares the data model of two SQL Server Version 7 databases.
Compare Oracle Environments	Compares the data model of two Oracle schemas.
Distribution Detail	Lists the contents and results of a distribution.
Environment Comparison by Objects Migrated	Given two environments, this report looks at the history of all the objects migrated into each environment (using Mercury Change Management) and lists any differences.
Environments/Objects Detail	Lists objects that have been migrated into a given environment or set of environments.
Object History	Provides a workflow step transaction history for packages.
Objects/Environments Detail	Lists objects that have been migrated into a given environment or a set of environments.
Package Details	Returns details about a given package.
Package History	Lists the complete workflow history of a given package.
Package Impact Analysis	Lists three separate sections for analysis: • Other packages that contain common objects with a given package • Objects that have migrated alongside one or more of the objects being migrated on the given package but are not included in the given package • Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed
Packages Pending	Lists: • Open packages with pending activity • Details about each package • Pending work for a group of users

Table B-2. Change Management reports [continued]

Report	Definition
Release Detail	Lists requests, packages and distributions associated with a release.
Release Notes	Shows all of the requests and packages in a release as well as their associations.

For More Information

For more information about Change Management reports, see the *Reports Guide and Reference*.

Demand Management Reports

The Demand Management reports (listed in *Table B-3*) are available to users with a Mercury Demand Management application license.

Table B-3. Demand Management reports

Report	Definition
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
DEM Demand Creation History	Shows the history of demand creation for a specified demand set.
DEM Historical SLA Violation	Shown the history of SLA violations for a specified demand set.
DEM Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using a number of selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered by values in custom fields.
Request History	Lists the complete workflow and field change history for each selected request.
Request Quick View	Lists a quick summary of open and closed requests, breaking down the requests by 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 by values in custom fields.
Resource Load by Priority	Lists all open requests assigned to different users. This report is also in the Resource category.

For More Information

For more information about Demand Management reports, see the *Reports Guide and Reference*.

Financial Management Reports

The Financial Management reports (listed in *Table B-4*) are available to users with a Mercury Time Management™ application license.

Table B-4. Financial Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping. This report is also in the Time Management category.
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. This report is also in the Project Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Project Management category.

For More Information

For more information about Financial Management reports, see the *Reports Guide and Referenc*e.

Portfolio Management Reports

The Portfolio Management reports are available to users with a Mercury Portfolio Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Program Management Reports

The Program Management reports are available to users with a Mercury Program Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Project Management Reports

The Project Management reports (listed in *Table B-5*) are available to users with a Mercury Project Management application license.

Table B-5. Project Management reports

Report	Definition
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. Totals include both labor and non-labor costs. This report is also in the Financial Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Financial Management category.
Project Critical Path	Displays the tasks that are on a project's critical path.
Project Custom Detail	Generated in HTML table format, showing only the columns that are selected from the header fields and custom fields based on the selected project.
Project Detail	Queries projects by their header fields.
Project Detail (Filter by Custom Fields)	Queries projects by their header fields. You can filter the query using the project's custom fields.
Project Exception Detail	Lists task details for tasks that have violated user-defined exception rules.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. This report is also in the Resource category.
Project Schedule Change	Compares a project plan with a baseline, or a baseline to another baseline.
Project Status Detail	Summarizes project statuses of selected projects and tasks.
Project Summary	Displays all projects that meet the criteria selected in the header fields.
Project Task Assignment	Shows assignment information for a user or a group of users. This report is also in the Resource category.
Project Template Detail	Lists the parameters and parameter details for project templates.

For More Information

For more information about Project Management reports, see the *Reports Guide and Reference*.

Resource Management Reports

The Resource Management reports (listed in *Table B-6*) are available to users with the licenses indicated in the definition column in the table.

Table B-6. Resource Management reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. Available to users with an administration license. This report is also in the Administrative category.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. Available to users with a Mercury Project Management license.
Project Task Assignment	Shows assignment information for a user or a group of users. Available to users with a Mercury Project Management license.
Resource Load by Priority	Lists open requests assigned to different users. Available to users with a Mercury Demand Management license.
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is available to users with any application license. This report is also in the Administration category.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. Available to users with a Mercury Time Management application license. This report is also in the Time Management category.

For More Information

For more information about Resource Management reports, see the *Reports Guide and Reference*.

Time Management Reports

The Time Management reports (listed in *Table B-7*) are available to users with a Mercury Time Management application license.

Table B-7. Time Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping.
Actual Time Summary	Summarizes actual time information entered in non-cancelled time sheets.
Time Sheet Details	Summarizes multiple time sheets displays their details.
Time Sheet Summary	Summarizes time information entered in non-cancelled time sheets.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. This report is also in the Resource category.

For More Information

For more information about Time Management reports, see the *Reports Guide and Reference*.

Index