

HP Project and Portfolio Management Center

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Tracking and Managing IT Demand Configuration Guide

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1 Getting Started with Tracking and Managing IT Demand Configuration

In This Chapter:

- *Introduction to IT Demand Configuration*
 - *Overview of IT Demand Configuration*
 - *Accessing PPM Center*
 - *Related Information*
-

Introduction to IT Demand Configuration

HP Demand Management is an HP Project and Portfolio Management Center (PPM Center) product that provides a single application and repository to capture all demand placed on an IT organization. PPM Center consolidates information from the many different sources so you can view aggregate demand in real time and report against it. Standard demand categories allow IT organizations to normalize the demand from different sources. This helps direct the right people to the right activities.

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

Overview of IT Demand Configuration

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



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

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

- Step one: Create the IT demand request type.

To create the IT demand request type, you configure request types and their associated request header types to include the Demand Management Field Groups, and configure the SLAs in the request types. For more detailed information, see [Chapter 2, *Configuring IT Demand Request Types*, on page 15](#).

- Step two: Configure the demand set.

To configure the demand set, you set up the demand fields and map them to fields on each demand request type. For more detailed information, see [Chapter 3, *Configuring Demand Sets*, on page 27](#).

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

To configure the workflow for IT demand tracking and management, you use special transitions in your workflows that enable IT demand scheduling features. For more detailed information, see [Chapter 4, *Configuring Workflows for IT Demand*, on page 37](#).

- Step four: Configure the SLAs.

To configure SLAs to correspond to an acceptable level of performance or reaction time for items managed through HP Demand Management, you must configure the request types with SLA-specific levels, violation dates, service request dates, and service satisfied dates. For more information, see [Chapter 5, *Configuring Service Level Agreements for IT Demand*, on page 41](#)

Accessing PPM Center

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

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

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

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

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

Related Information

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

- *Getting Started*
- *Guide to Tracking and Managing IT Demand*
- *HP Demand Management User's Guide*
- *HP Demand Management Configuration Guide*
- *Commands, Tokens, and Validations Guide and Reference*
- *Open Interface Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*

2 Configuring IT Demand Request Types

In This Chapter:

- *IT Demand Request Types Overview*
 - *Default IT Demand Request Types*
 - *Overview of Request Type Field Attributes*
 - *Overview of Creating IT Demand Request Types*
 - *Adding IT Demand to Request Header Types*
 - *Adding Request Header Types to Request Types*
 - *IT Demand SLA Fields*
 - *IT Demand Schedule Fields*
 - *Configuring Effort for IT Demand*
 - *Configuring Effort for IT Demand Request Types*
-

IT Demand Request Types Overview

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

The request page contains all information typically required to complete a specific business process. The HP Demand Management solution for managing and tracking IT demand requires that two specific categories (and associated fields) be included on an IT demand request type (see *Figure 2-1*):

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

Figure 2-1. IT demand request

Create New DEM - Application Bug

Expand All Collapse All Submit Cancel

Header

Summary

Requested By: Jane Smith
Request Status: Unreleased

Workflow: DEM - Bug Request Workflow

Assigned To:

Assigned Group:

Requestor Department:

Priority:

Application:

Description:

Details

Problem/Resolution

Environment

Analysis

Project Information

Demand Management SLA Fields

SLA Level:

SLA Violation Date:

Service Requested Date:

Service Satisfied Date:

Demand Management Scheduling Fields

Estimated Start Date:

Estimated Effort:

Reject Date:

Demand Satisfied Date:

Notes

References

Submit Cancel

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

Default IT Demand Request Types

Table 2-1 provides a list of the HP-supplied IT demand request types.

Table 2-1. IT demand request types

Request Type	Description
DEM - Application Bug	Report an existing application bug and request its correction. By default, SLAs are not selected and scheduling fields are selected.
DEM - Application Enhancement	Request an enhancement to an existing application. By default, SLAs are not selected and scheduling fields are selected.
DEM - Database Refresh	Request a database refresh. By default, SLAs are selected and scheduling fields are selected.
DEM - Initiative	Request something new, such as a new project or a new program. By default, SLAs are not selected and scheduling fields are selected.

Overview of Request Type Field Attributes

When creating request type fields, there are three general attributes associated with each field.

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

[For More Information](#)

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

Overview of Creating IT Demand Request Types

To create an IT demand request type:

1. Add the IT demand fields to a request header type.
See *Adding IT Demand to Request Header Types*.
2. Add the IT demand request header type to a request type.

For instructions, see *Adding Request Header Types to Request Types* on page 21.

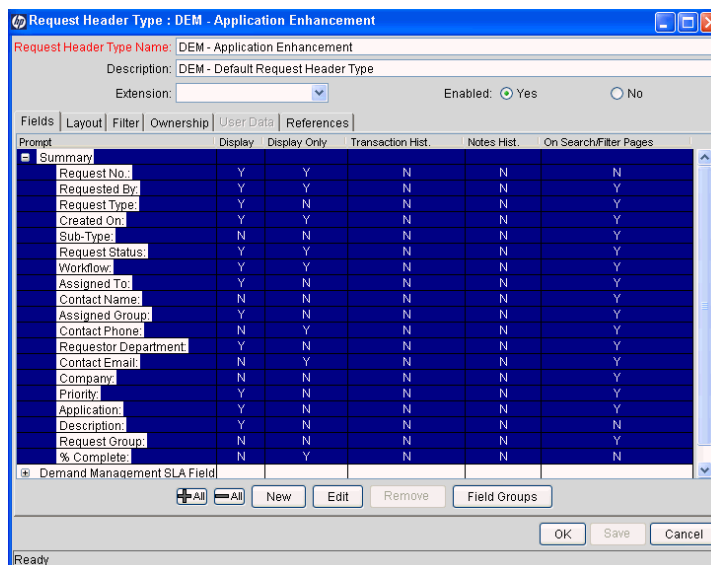
3. Configure the SLA fields.

For instructions, see *IT Demand SLA Fields* on page 23.

Adding IT Demand to Request Header Types

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

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Header Types**.
The Request Header Type Workbench opens.
4. Open an existing request header type or create a new request header type.
The Request Header Type window opens.



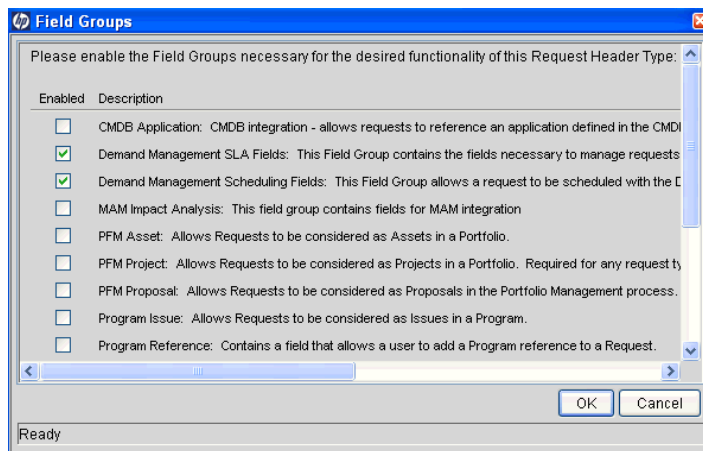
5. Check to make sure that the request header type general information is complete.

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

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

6. Click **Field Groups**.

The Field Groups window opens.



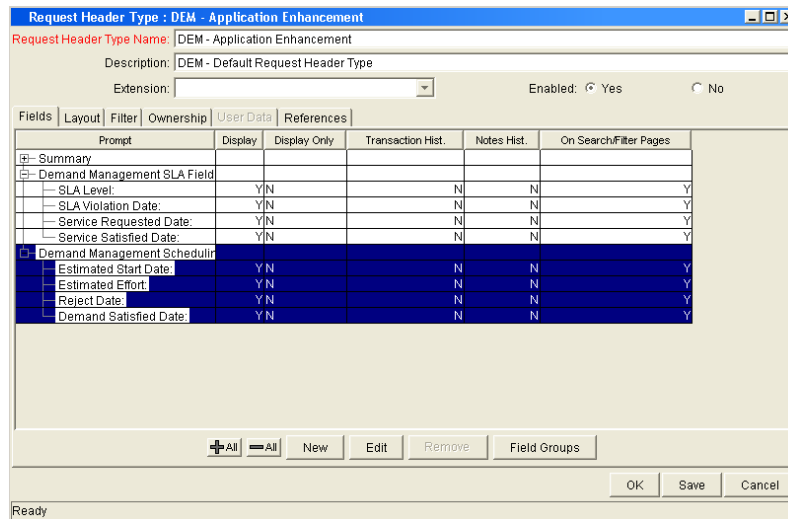
7. Select the checkboxes for the IT demand fields.

The IT demand fields are:

- **Demand Management SLA Fields**
- **Demand Management Scheduling Fields**

8. Click **OK**.

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



9. Complete the request header type as required.

See the *HP Demand Management Configuration Guide*.

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

The request header type is enabled.

11. Click **OK** to save the changes and close the Request Header Type window.

Click **Save** to save the changes and leave the Request Header Type window open.

[For More Information](#)

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

Adding Request Header Types to Request Types

To add a request header type to a request type:

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

The PPM Workbench opens.

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

The Request Type Workbench opens.

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

The Request Type window opens.

The screenshot shows the 'Request Type : DEM - Application Enhancement' window. The 'Request Type Name' is 'DEM - Application Enhancement' and the 'Request Header Type' is '- Application Enhancement'. The 'Creation Action Name' is 'Request an Application Enhancement'. The 'Category' and 'Extension' are empty. The 'Description' is 'Application Enhancements should be used to request new functionality in IT current applications'. The 'Meta Layer View' is 'MREQ_ | DEM_APPS_ENHANCEMENT'. The 'Max Fields' is 50 and 'Enabled' is Yes. The window has a menu bar with 'Commands', 'Sub-Types', 'Workflows', 'User Access', 'Notifications', 'User Data', 'Ownership', and 'Help Content'. Below the menu bar is a table with columns: 'Fields', 'Layout', 'Display Columns', 'Request Status', 'Status Dependencies', and 'Rules'. The table has a header row with 'Prompt', 'Token', 'Enabled', 'Component Type', and 'Validation'. The table contains the following rows:

Prompt	Token	Enabled	Component Type	Validation
[-] Summary				
[-] Enhancement Details				
[-] Analysis				
[-] Demand Management SLA Field				
[-] Demand Management Scheduling				

At the bottom of the window, there are buttons for '+ All', '= All', 'New', 'Edit', 'Remove', 'OK', 'Save', and 'Cancel'. The status bar at the bottom left says 'Ready'.

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

See the following table for the general information fields and definitions for request types.

Field Name	Description
Request Type Name	The name of the request type.
Creation Action Name	A description of the request type's function. For example Log a Product Bug. Creation Action Names display on the Create New Request page.
Category	The category containing the request type. Categories are created by an application administrator and are based on the business needs of the organization. Examples of categories which an organization might use are Sales and Support and General Administration . Categories display on the Create New Request window in the standard interface. [Validation = CRT - Request Type Category]
Extension	For release types created for an HP Deployment Management Extension. Select the Extension from the list.
Description	Description of how to use the request type.
Meta Layer View	Meta layer views relate information specific to the PPM Center. For example, the reporting meta layer view MREQ_OPENED_CLOSED_BY_TYPE_D provides summary information for request submission and completion activity, broken down by request type and by calendar day.
Max Fields	The maximum number of fields the request type can have.
Enabled	Indicates whether or not the request type is available to PPM Center.
Request Header Type	Selects a request header type to be used with this request type. Select an existing request header type from the auto-complete list. To start to create a new request header type, click New .

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

All enabled request header types are displayed in the auto-complete. If you cannot find your IT demand request header type, return to the Request Header Type window and make sure the request header type is enabled.

7. Complete the request type as required.

See the *HP Demand Management Configuration Guide*.

8. In the **Enable** field, select **Yes**.

The request type is enabled.

9. Click **OK** to save the changes and close the Request Type window.

Click **Save** to save the changes and leave the Request Type window open.

For More Information

For more information regarding configuration of request types, see the *HP Demand Management Configuration Guide*.

IT Demand SLA Fields

IT demand can be tracked and reported on using a predefined set of Service Level Agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time as specified by your business processes.

The **Service Requested Date** is set upon initiation on the request. The user then sets the SLA level in the request and the SLA violation date is calculated. If the request is not closed before the SLA violation date, an SLA exception occurs.

Figure 2-2. IT demand SLA fields

The screenshot shows a software interface with a sidebar on the left containing a tree view with the following items: Details, Enhancement Details, Analysis, and Demand Management SLA Fields. The main area displays four configuration fields, each with a dropdown arrow icon on the right: SLA Level (set to 'Critical - 3 Days'), SLA Violation Date (set to 'November 5, 2004'), Service Requested Date (set to 'November 1, 2004'), and Service Satisfied Date (empty). Below these fields is another sidebar item labeled 'Demand Management Scheduling Fields'.

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

Table 2-2 lists the IT demand SLA fields.

Table 2-2. IT demand SLA fields

Request Type	Description
SLA Level	The SLA Level field is set by a rule based on the priority of the request. The default values for the DEM - SLA Level Validation are: <ul style="list-style-type: none"> ■ Critical - 3 Days ■ High - 5 Days ■ Normal - 15 Days ■ Low - 30 Days
SLA Violation Date	The SLA Violation Date is set by a rule based on Service Level and Service Requested Date . The SLA violation date equals the service requested date plus the time specified by the service level validation.
Service Requested	The Service Requested Date is set by a rule to the creation date of the request. It can be set to correlate with any workflow step.
Service Satisfied	The Service Satisfied Date is set by the execution workflow step, DEM - SLA Satisfied On.

IT Demand Schedule Fields

Once IT demand is created, an IT manager or IT work scheduler must decide when to start work on the IT demand, the estimated effort required, when the IT demand is satisfied, and if the IT demand should be rejected.

Figure 2-3. IT demand schedule fields

The screenshot shows a software interface with a sidebar on the left containing a tree view with the following items: Details, Enhancement Details, Analysis, Demand Management SLA Fields, and Demand Management Scheduling Fields. The main area displays four scheduling fields, each with a text input box and a calendar icon:

- Estimated Start Date:** November 5, 2004
- Estimated Effort:** (empty input box)
- Reject Date:** (empty input box)
- Demand Satisfied Date:** (empty input box)

Table 2-3 lists the IT demand scheduling fields.

Table 2-3. IT demand scheduling fields

Field Names	Description
Estimated Start Date	The anticipated date when the task to complete the IT demand will start. The Estimated Start Date is entered by the IT manager or responsible IT work scheduler.
Estimated Effort	The Estimated Effort is set by a rule. This rule can be changed for your specific request type. The following lists the default effort associated with the IT demand request type: <ul style="list-style-type: none"> ■ DEM - Application Bug = 2 ■ DEM - Application Enhancement = 5 ■ DEM - Initiative = 5 ■ DEM - Database Refresh = 1
Reject Date	The date the request was rejected. The Reject Date is entered by the IT manager or responsible IT work scheduler.
Demand Satisfied Date	The date the IT demand was completed. The Demand Satisfied Date is entered by the IT manager or responsible IT work scheduler.

Configuring Effort for IT Demand

IT demand allows you to analyze demand based on one of the following:

- The number (total count) of IT demand requests
- The accumulation of effort associated with each IT demand request

Consider the case where you have ten requests for database refreshes and ten requests for bug fixes. If a database refresh takes one hour to fulfill and a bug fix takes two days to fulfill, it might be more meaningful for the organization to factor in the effort involved in fulfilling demand. If you want effort to equal the total count of IT demand requests, set the estimated effort of each IT demand request type to one.

Each IT demand request type has a default effort assigned to it (see *IT Demand Schedule Fields* on page 24). This effort can be reconfirmed or changed during an analysis phase later in the process (on the request). The following are a few examples of how you can set the default effort for a request type:

- Single default using field defaults
- Advanced defaults driven by other request type fields using rules
- Using status dependencies in an analysis phase in the request process with reconfirm

Configuring Effort for IT Demand Request Types

To configure effort for IT demand:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
The Request Type Workbench opens.
4. To see the complete list of request types, click **List**.
5. Open an IT demand request type or create a new IT demand request type.
The Request Type window opens to the **Fields** tab.
6. Click the **Rules** tab.
7. Select **Default for Estimated Effort**, and then click **Edit**.
The Rules window opens and displays the Default for Estimated Effort.
8. In the **SQL** field, change the default number.
For example, to set the Default for Estimated Effort to 10, change

```
select 5,5 from dual
```


to

```
select 10,10 from dual
```
9. In the Rules window, click **OK**.
The Rules window disappears.
10. Click **OK** to save the changes and close the Request Type window.
Click **Save** to save the changes and leave the Request Type window open.

3 Configuring Demand Sets

In This Chapter:

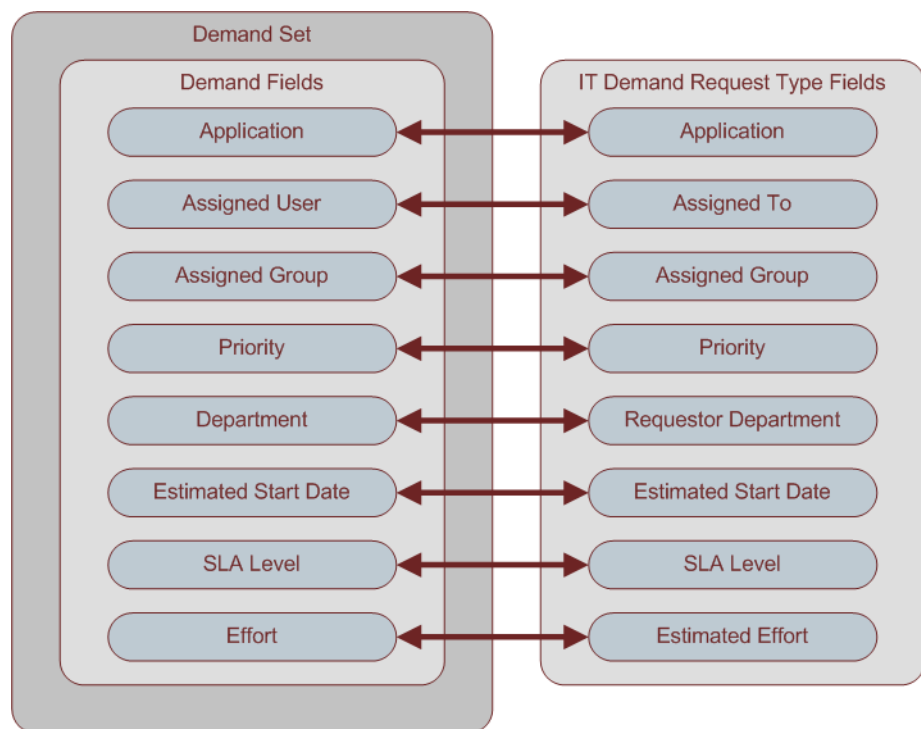
- *Overview of Demand Sets*
 - *Configuring Demand Sets*
 - *Configuring Demand Set Fields*
 - *Mapping Demand Set Fields to IT Demand Request Type Fields*
 - *Copying Demand Sets*
 - *Deleting Demand Sets*
 - *Deleting IT Demand Request Types from Demand Sets*
 - *Deleting Demand Set Fields from Demand Sets*
-

Overview of Demand Sets

Field naming conventions across different IT demand request types might not be the same. However, you might find it useful to manage and report across the different IT demand types in a consistent way. Demand sets help the system know how to report across the different IT demands.

Each demand set can include a unique group of demand fields and demand request types. Each demand set can then have a unique mapping of IT demand fields to IT demand request type fields (see *Figure 3-1*).

Figure 3-1. Demand set field and IT demand request type field mapping



You can use the **Demand** menu to create and configure demand sets in the standard interface. If you cannot see the **Demand** menu, contact your application administrator.

To configure a demand set:

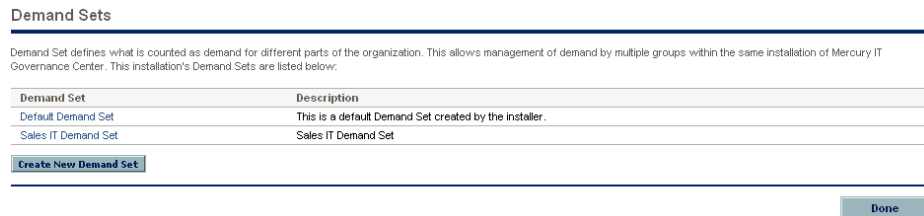
1. Configure the demand set.
2. Configure the fields for the demand set.
3. Add an IT demand request type to the demand set and map the fields.

Configuring Demand Sets

To configure a demand set:

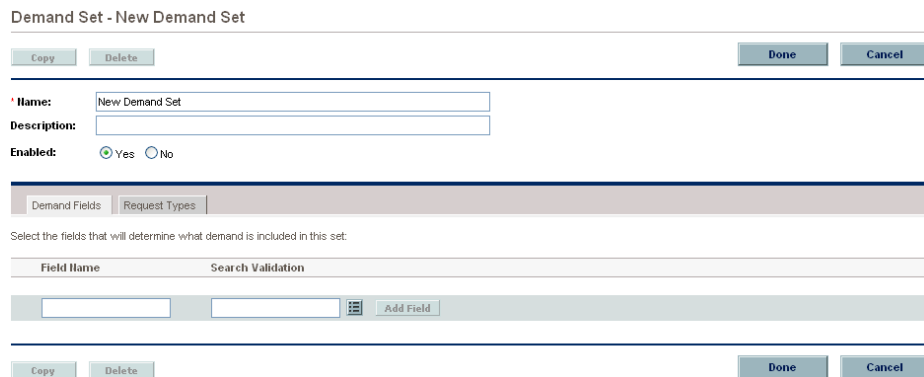
1. Log on to PPM Center.
2. From the menu bar, select **Administration > Demand Sets & Processes > Manage Demand Sets**.

The Demand Sets page opens.



3. Click **Create New Demand Set**.

The Demand Set - New Demand Set page opens.



4. On the Demand Set - New Demand Set page, enter the information listed in the following table.

Field Name	Description
Name	Enter the name of the new demand set.
Description	Enter a brief description explaining the function of this demand set.
Enabled	Make the demand set available to the system. To make the demand set available to the system, select Yes . The demand set must have at least one field and one request type selected.

5. On the Demand Set - New Demand Set page, click **Done**.

The new demand set is configured.

Configuring Demand Set Fields

Once the demand set is configured, you must configure the fields associated with a demand set. Once configured, these demand set fields must be mapped to IT demand request type fields. These fields should be common fields that you use for managing and reporting on the various types of demand. Each demand set field must exist in each of the IT demand request types.

To configure a demand set field:

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

The Demand Sets page opens.

Demand Set	Description
Default Demand Set	This is a default Demand Set created by the installer.
Sales IT Demand Set	Sales IT Demand Set

3. Click the name of a demand set.

The Demand Set page opens.

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

The **Demand Fields** tab is opened.

Demand Set - Default Demand Set

Name:

Description:

Enabled: Yes No

Select the fields that will determine what demand is included in this set:

Field Name	Search Validation
<input checked="" type="checkbox"/> Application	DEM Filter - Application - E
<input checked="" type="checkbox"/> Assigned User	DEM Filter - User Id - Enabl
<input checked="" type="checkbox"/> Assigned Group	DEM Filter - Security Group
<input checked="" type="checkbox"/> Priority	DEM Filter - Priority - Enabl
<input checked="" type="checkbox"/> Department	DEM Filter - Department - E
<input checked="" type="checkbox"/> Requestor Location	DEM Filter - Requestor Loc
<input checked="" type="checkbox"/> Business Initiative	DEM Filter - Business Initia
<input checked="" type="checkbox"/> Estimated Start Date	Date
<input checked="" type="checkbox"/> Reject Date	Date
<input checked="" type="checkbox"/> SLA Level	DEM - SLA Level
<input checked="" type="checkbox"/> SLA Violation Date	Date
<input checked="" type="checkbox"/> Service Requested Date	Date
<input checked="" type="checkbox"/> Service Satisfied Date	Date
<input checked="" type="checkbox"/> Effort	Numeric Text Field

5. Create a demand set field, as follows:

- a. At the bottom of the **Field Name** column, in the empty field, type a field name.
- b. At the bottom of the **Search Validation** column, in the empty field, select the validation from the auto-complete.

The search validation is used to offer the full set of available values. For example, if one demand type was only available to users in the United States and another was available to users in Europe. Each IT demand request type would use its own field but the search field would include all possible choices.

- c. Click **Add Field**.

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

6. Repeat [step 5 on page 31](#) as many times as necessary.
7. Click **Done**.

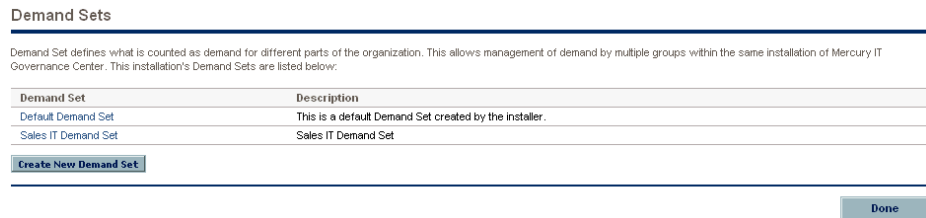
The fields are added to the demand set.

Mapping Demand Set Fields to IT Demand Request Type Fields

To map demand set fields to IT demand request type fields:

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

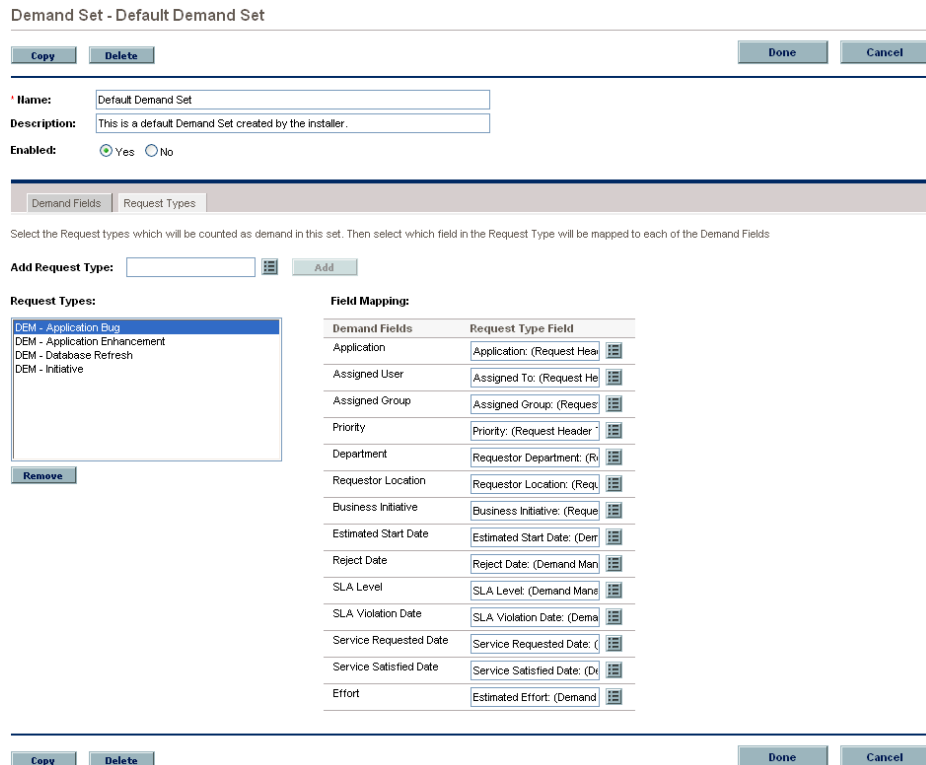
The Demand Sets page opens.



3. Click the name of a demand set.

The Demand Set page for the demand set opens.

4. On the Demand Set page, select the **Request Types** tab.
5. The **Request Types** tab page is opened.



6. In the **Add Request Type** field, select an IT demand request type from the auto-complete.

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

7. Next to the **Add Request Type** field, click **Add**.

The IT demand request type is added to the demand set. The IT demand request type is displayed in the **Request Types** field. You must map all of the demand set fields to the IT demand request type fields before adding another IT demand request type to the demand set.

8. Under **Field Mapping**, map the fields of the **Demand Fields** column to the fields of the **Request Type Field** column.

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

9. Repeat the process as many times as necessary until all of the IT demand request types are added to the demand set and all of the IT demand request type fields are mapped to demand set fields.

10. On the Demand Set page, click **Done**.

The changes to the demand set are saved. The IT demand request types and field mappings are added to the demand set.

Copying Demand Sets

To copy a demand set:

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

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

4. On the Demand Set page, click **Copy**.
5. A copy of the Demand Set page is created.
6. On the copy of the Demand Set page, in the **Name** field, type a new name for the copied demand set.
7. On the copy of the Demand Set page, click **Done**.

The copy of the Demand Set is completed.

Deleting Demand Sets

To delete a demand set:

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

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

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

A delete confirmation window opens.

5. In the delete confirmation window, click **OK**.
6. The selected demand set is deleted and the Demand Sets page opens.
7. In the Demand Sets page, click **Done**.

Deleting IT Demand Request Types from Demand Sets

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

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

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

4. Click the **Request Types** tab.

The **Request Types** tab opens.

5. In the **Request Types** field, select an IT demand request type.

6. Below the **Request Types** field, click **Remove**.

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

8. On the **Request Types** tab, click **Done**.

Deleting Demand Set Fields from Demand Sets

To delete a demand set field from a demand set:

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

The Demand Sets page opens.

3. Click the name of a demand set.

The Demand Set page for the demand set opens.

4. Click the **Demand Sets** tab.

The **Demand Sets** tab opens.

5. Click the Delete icon next to the demand set field.

The demand set field is deleted from the demand set.

6. On the **Demand Sets** tab, click **Done**.

4 Configuring Workflows for IT Demand

In This Chapter:

- *Overview of IT Demand and Workflows*
 - *Accessing the IT Demand Workflows*
 - *Accessing the Bug Fix Workflow*
 - *Accessing the Enhancement Workflow*
 - *Accessing the Initiative Workflow*
 - *Configuring IT Demand Transitions*
 - *Managing IT Demand Event Errors*
-

Overview of IT Demand and Workflows

The schedule, reject, and assign functions in Demand Management interact directly with workflows. When a request is scheduled, rejected, or assigned, the current workflow step is selected for a transition. If the workflow step is configured with a scheduling-related transition, the request follows the transition out of the step. If this transition is not defined for the current workflow step, no processing occurs, but the IT demand is still marked as scheduled, rejected, or assigned (see *Figure 4-1* and *Figure 4-2*).

Figure 4-1. Workflow step without IT demand transitions

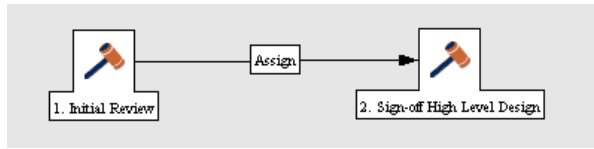
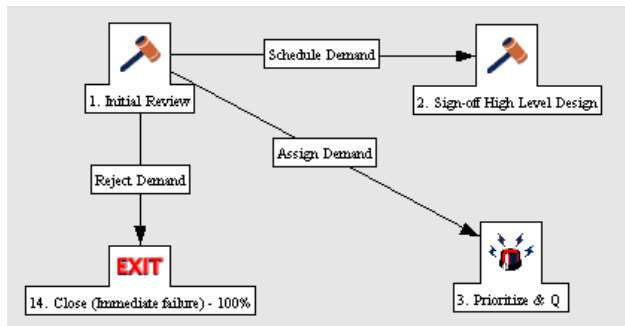


Figure 4-2. Workflow step with IT demand transitions



Accessing the IT Demand Workflows

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

- Bug fixes
- Enhancement requests
- Initiatives

Accessing the Bug Fix Workflow

To quickly access the Bug Fix Workflow Workbench:

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

The workflow for IT demand bug fixes opens.

Accessing the Enhancement Workflow

To quickly access the Enhance Workflow Workbench:

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

The workflow for IT demand enhancements opens.

Accessing the Initiative Workflow

To quickly access the Initiative Workflow Workbench:

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

The workflow for IT demand initiatives opens.

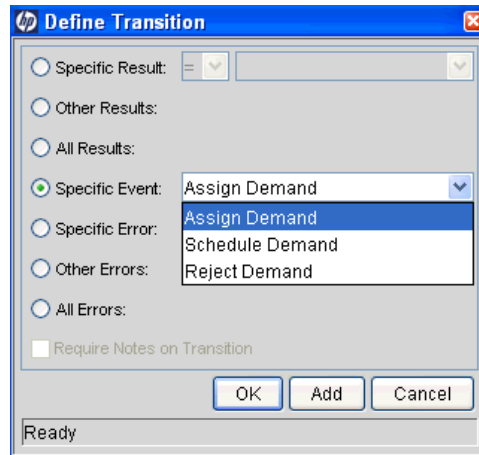
Configuring IT Demand Transitions

HP Demand Management for IT demand includes an additional method for transitioning out of a workflow decision step that coincides with an IT demand scheduling event. When adding a transition from one workflow decision step to another workflow step, in the Define Transition window (see [Figure 4-3](#)), select **Specific Event**, and then specify the event for the transition.

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

- Assign Demand
- Schedule Demand
- Reject Demand

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



[For More Information](#)

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

Managing IT Demand Event Errors

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

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

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

5 Configuring Service Level Agreements for IT Demand

In This Chapter:

- *Setting Up Service Level Agreements for IT Demand*
 - *SLA Behavior*
 - *Configuring SLA Rules*
 - *Configuring SLA Levels*
 - *Configuring SLA Violation Dates*
 - *Configuring Service Requested Dates*
 - *Configuring Service Satisfied Dates*
-

Setting Up Service Level Agreements for IT Demand

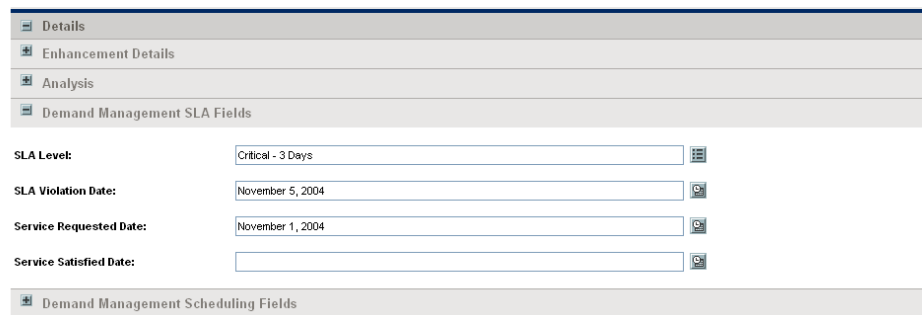
The HP Demand Management IT demand solution tracks and reports on a predefined set of service level agreements (SLAs). SLAs correspond to an acceptable level of performance or reaction time for items you manage through Demand Management. After you configure the IT demand types, demand sets and workflows,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

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

SLA Behavior

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

Figure 5-1. Demand Management SLA Fields



The screenshot shows a web-based configuration interface for Demand Management SLA Fields. It features a sidebar with expandable sections: Details, Enhancement Details, Analysis, and Demand Management SLA Fields (which is currently expanded). The main content area contains four input fields, each with a label and a value:

Field Label	Value
SLA Level:	Critical - 3 Days
SLA Violation Date:	November 5, 2004
Service Requested Date:	November 1, 2004
Service Satisfied Date:	

Below these fields is another expandable section labeled Demand Management Scheduling Fields.

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

▶ The service requested date need not correlate to the request creation date. For example, the customer's SLA might be based on the time it takes to implement a bug fix following bug approval (rather than the bug creation). The service satisfied date marks the end of the request resolution process. Demand Management for IT demand can be set to satisfied at any point in the process.

Configuring SLA Rules

SLA behavior is based on the request type rules and workflow configurations. *Figure 5-2* shows an example of the SLA fields on a request type.

Figure 5-2. Dem - Database Refresh Request Type

Prompt	Display	Display Only	Transaction Hist.	Notes Hist.	On Search/Filter Pages
Summary					
Demand Management SLA Field					
SLA Level	Y N		N	N	Y
SLA Violation Date	Y N		N	N	Y
Service Requested Date	Y N		N	N	Y
Service Satisfied Date	Y N		N	N	Y
Demand Management Scheduling					
Estimated Start Date	Y N		N	N	Y
Estimated Effort	Y N		N	N	Y
Reject Date	Y N		N	N	Y
Demand Satisfied Date	Y N		N	N	Y

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

Configuring SLA Levels

The **SLA Level** is set by a rule based on request priority. The validation for the **SLA Level** field is DEM - SLA Level. *Figure 5-3* shows the rules window and validation for SLA level. The default values for the DEM - SLA Level validation are:

- Critical - 3 Days
- High - 5 Days
- Normal - 15 Days
- Low - 30 Days

Figure 5-3. SLA Level Rule and Validation windows

Rules Window

Rule Name: SLA Level & SLA Violation Date Setup

Description: SLA Level & SLA Violation Date Setup

Enabled: Yes No

Rule Event: Apply On Field Change

Rule Type: Advanced Defaults

Dependencies:

Field Name	Value
Priority:	All Values

New Edit Remove

Results:

Field Name	Column	Token
SLA Violation Date:	1	REQ.P.KNTA.SLA_VIOLATION_DATE
	2	REQ.VP.KNTA.SLA_VIOLATION_DATE
SLA Level:	3	REQ.P.KNTA.SLA_LEVEL
	4	REQ.VP.KNTA.SLA_LEVEL

New Remove

SOL:

```
SELECT
sysdate + to_number(kl.description),
sysdate + to_number(kl.description),
kl.meaning,
kl.meaning
FROM knta_lookups kl
WHERE kl.lookup_type = 'DEM - SLA Level: Bug'
AND kl.lookup_code = 'REQ.PRIORITY_CODE'
AND kl.enabled_flag = 'Y'
```

OK Apply Cancel

Ready

Validation : DEM - SLA Level

Name: DEM - SLA Level

Description:

Enabled: Use in Workflow?

Component Type: Auto Complete List

Validated By: List Expected list length: Short Long

Selection mode: Starts With Contains Number of results per page: 50

Configuration Filter Fields Filter Layout

Validation Values:

Seq	Code	Meaning	Description	Enabled	Default
1	1	Critical - 3 Days	3	Y	N
2	2	High - 5 Days	5	Y	N
3	3	Medium - 15 Days	15	Y	N
4	4	Low - 30 Days	30	Y	N

New Edit Delete Copy From ↑ ↓

Used By Ownership

OK Save Cancel

Ready (Read-Only, Seed Data)

Configuring SLA Violation Dates

The **SLA Violation Date** is set by a rule based on the service level and service requested date. The SLA violation date equals the service requested date plus the time determined by the service level validation. *Figure 5-4* shows the Rules window for SLA violation date.

Figure 5-4. SLA violation date rule

The screenshot shows the 'Rules Window' for a rule named 'SLA Level & SLA Violation Date Setup'. The rule is enabled and set to trigger on 'Apply On Field Change' with the type 'Advanced Defaults'. It has a dependency on the 'Priority' field with the value 'All Values'. The results table lists four fields: 'SLA Violation Date' (tokens: REQ.P.KNTA_SLA_VIOLATION_DATE, REQ.VP.KNTA_SLA_VIOLATION_DATE), 'SLA Level' (tokens: REQ.P.KNTA_SLA_LEVEL, REQ.VP.KNTA_SLA_LEVEL). The SQL code is as follows:

```
SELECT
sysdate + to_number(kl.description),
sysdate + to_number(kl.description),
kl.meaning,
kl.meaning
FROM knta_lookups kl
WHERE kl.lookup_type = 'DEM- SLA Level : Bug'
AND kl.lookup_code = 'REQ.PRIORITY_CODE'
AND kl.enabled_flag = 'Y'
```

Configuring Service Requested Dates

The service requested date is set by a rule to the creation date of the request. The service requested date could be set to correlate with any workflow step. *Figure 5-5* shows the rules window for service requested date.

Figure 5-5. Service requested date rule

The screenshot shows the 'Rules Window' interface. At the top, the 'Rule Name' is 'Service Requested On Setup' and the 'Description' is 'Default Service Requested On Setup'. The 'Enabled' checkbox is checked. The 'Rule Event' is 'Apply On Creation' and the 'Rule Type' is 'Advanced Defaults'. Below this is a 'Dependencies' section with a table:

Field Name	Value
Priority:	All Values

Buttons for 'New', 'Edit', and 'Remove' are located below the dependencies table. The 'Results' section contains a table with columns 'Field Name', 'Column', and 'Token':

Field Name	Column	Token
Service Requested Date:	1	REQ.P.KNTA_SLA_SERV_REQUESTI
	2	REQ.VP.KNTA_SLA_SERV_REQUES

Buttons for 'New' and 'Remove' are located below the results table. To the right of the results table is an 'SQL' text area containing the following query:

```
SELECT
sysdate,
sysdate
FROM dual
```

At the bottom right of the window are 'OK', 'Apply', and 'Cancel' buttons. The status bar at the bottom left shows 'Ready'.

Configuring Service Satisfied Dates

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

Figure 5-6. Database refresh workflow execution

Execution

Execution | Ownership | User Data | Used By

Name: DEM - SLA Satisfied On Workflow Scope: ALL

Description: DEM - Scope Check

Execution Type: Workflow Step Commands Workflow Event: None

Validation: WF - Standard Execution Results Timeout: Days

Processing Type: Immediate Enabled: Yes

Icon: question2.gif

Command	Condition
Set Request Satisfied On	[WFS.STEP_NAME] = 'SLA_CLOSE'

Command Steps	Command
	ksc_store REQUEST_SATISFIED_ON=[WFIP.TEMP_DATE];[WFIP.TEMP_DA

Buttons: + All, = All, New Cmd, Edit Cmd, Copy Cmd, Remove, Up/Down arrows

Buttons: Verify, OK, Save, Cancel

Ready

Edit Command

Command: Set Request Satisfied On

Condition: [WFS.STEP_NAME] = 'SLA_CLOSE'

Description:

Timeout (s): 90

Enabled: Yes

Steps:

```
ksc_store REQUEST_SATISFIED_ON=[WFI.P.TEMP_DATE];[WFI.P.TEMP_DATE]
```

Buttons: Tokens, Special Cmd, Show Desc, OK, Apply, Cancel

Ready

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