

K I N T A N A™

# Demand Management Configuration Guide

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# Chapter 1 Introduction

The Kintana Solution for Demand Management provides a single application and repository to capture all demand placed on IT. Kintana consolidates information from the many different sources so you can both view aggregate demand in real time and report against it. In addition, Kintana streamlines the end-to-end process (from demand through deployment) of fulfilling demand.

This document provides instructions for configuring Kintana to enable the successful management of demand on your company. Demand Management configuration includes such activities as creating and modifying Request Types and Workflows, specifying Demand Fields and Categories to be tracked, and enabling user access to Demand Management templates and menus.

This document includes the following chapters:

- *Installing the Kintana Demand Management Solution*
- *Key Concepts and Definitions*
- *Configuring Demand Management*
- *Customizing Templates and Menus*
- *Upgrade Notes*

## Who should read this guide

This document provides instructions for configuring Kintana to enable the successful management of demand on your company.

This Kintana Solution Configuration guide is used primarily by:

- Business or technical users who configure and maintain processes related to demand management.
- Request Type configuration experts.
- Workflow configuration experts.



Note

You must have the following licenses to view the configuration screens and pages discussed in this document:

- Demand Management Standard
- Create Power

Additionally, the following access grants are needed to configure demand management-related entities in Kintana:

- Manage Demands
- Edit Report Types: Create, update and delete Report Types in the Report Types Workbench.
- Edit User Data: Create, update and delete User Data in the User Data Workbench.
- Edit Validation Values: Create, update and delete Validation values in the Validations Workbench.
- Edit Validations: Create, update and delete Validations in the Validation Workbench.
- Edit Workflows: Generate, update and delete Workflows in the Workflows Workbench.
- Edit Request Header Types: Create, update and delete Request Header Types in the Request Header Types Workbench.
- Edit Request Types: Create, update and delete Request Types in the Request Types Workbench.
- Edit Default User Homepage: View and edit the default User Homepage for all Kintana Dashboard users.
- Edit Portlet Definition: Create, edit and delete Portlets in the Portlets Workbench.
- View Portlet Definition: View Portlet definitions in the Portlets Workbench.
- Edit Security Groups: Create, update and delete Security Groups in the Security Groups Workbench.
- Edit Users: Create, update and delete Users in the Users Workbench.

## How to use this guide

This document provides background information and details for configuring Kintana's Demand Management Solution at your site. Navigate to the desired topic using the Table of Contents or use the Index to find information related to key words.

If viewing this guide online, you can use the Kintana Library page's search functionality to quickly locate desired topics in this and other Kintana publications.

## What this guide is NOT

This configuration guide is not meant to provide end-user instructions for managing demand. For detailed information on capturing, analyzing and managing demand using Kintana, refer to the "[Demand Management User Guide](#)", accessible from the Kintana Library.

## Additional Resources

Kintana provides the following additional resources to help you successfully implement, configure, maintain and fully utilize your Kintana installation:

- [Kintana Documentation](#)
- [Kintana Services](#)
- [Kintana Education](#)
- [Kintana Support](#)

### *Kintana Documentation*

Kintana product documentation is linked from the Kintana Library page. This page is accessed by:

- Selecting **HELP > KINTANA LIBRARY** from the Kintana Workbench menu.
- Selecting **HELP > CONTENTS AND INDEX** from the menu bar on the HTML interface. You can then click the **KINTANA LIBRARY** link to load the full list of product documents.

Kintana organizes their documents into a number of user-based categories. The following section defines the document categories and lists the documents currently available in each category.

- *Kintana Business Application Guides*
- *User Guides*
- *Kintana Application Reference Guides*
- *Kintana Instance Administration Guides*
- *External System Integration Guides:*
- *Kintana Solution Guides*
- *Kintana Accelerator Guides*

## **Kintana Business Application Guides**

Provides instructions for modeling your business processes in Kintana. These documents contain process overviews, implementation instructions, and detailed examples.

- Configuring a Request Resolution System (Create)
- Configuring a Deployment and Distribution System (Deliver)
- Configuring a Release Management System
- Configuring the Kintana Dashboard
- Managing Your Resources with Kintana
- Kintana Reports

## **User Guides**

Provides end-user instructions for using the Kintana products. These documents contain comprehensive processing instructions.

- Processing Packages (Deliver) User Guide
- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide



- Navigating the Kintana Workbench:  
Provides an overview of using the Kintana Workbench
- Navigating Kintana:  
Provides an overview of using the Kintana (HTML) interface

## **Kintana Application Reference Guides**

Provides detailed reference information on other screen groups in the Kintana Workbench. Also provides overviews of Kintana's command usage and security model.

- Reference: Using Commands in Kintana
- Reference: Kintana Security Model
  
- Workbench Reference: Deliver
- Workbench Reference: Configuration
- Workbench Reference: Create
- Workbench Reference: Dashboard
- Workbench Reference: Sys Admin
- Workbench Reference: Drive
- Workbench Reference: Environments

## **Kintana Instance Administration Guides**

Provides instructions for administrating the Kintana instances at your site. These documents include information on user licensing and archiving your Kintana configuration data.

- Kintana Migration
- Kintana Licensing and Security Model

## External System Integration Guides:

Provides information on how to use Kintana's open interface (API) to access data in other systems. Also discusses Kintana's Reporting meta-layer which can be used by third party reporting tools to access and report on Kintana data.

- Kintana Open Interface

## Kintana Solution Guides

Provides information on how to configure and use functionality associated with the Kintana Solutions. Each Kintana Solution provides a User Guide for instructions on end-use and a Configuration Guide for instructions on installing and configuring the Solution.

## Kintana Accelerator Guides

Provides information on how to configure and use the functionality associated with each Kintana Accelerator. Kintana Accelerator documents are only provided to customers who have purchased a site-license for that Accelerator.



Note

Kintana provides documentation updates in the Download Center section of the Kintana Web site ([http://www.kintana.com/support/download/download\\_center.htm](http://www.kintana.com/support/download/download_center.htm)).

A username and password is required to access the Download Center. These were given to your Kintana administrator at the time of product purchase. Contact your administrator for information on Kintana documentation or software updates.

## *Kintana Services*

Kintana is a strategic partner to its clients, assisting them in all aspects of implementing a Kintana technology chain - from pilot project to full implementation, education, project turnover, and ongoing support. Our Total Services Model tailors solution and service delivery to specific customer

needs, while drawing on our own knowledgebank and best practices repository. Learn more about Kintana Services from our Web site:

<http://www.kintana.com/services/services.shtml>

### *Kintana Education*

Kintana has created a complete product training curriculum to help you achieve optimal results from your Kintana applications. Learn more about our Education offering from our Web site:

<http://www.kintana.com/services/education/index.shtml>

### *Kintana Support*

Kintana provides web-based interactive support for all products in the Kintana product suite via Contori.

<http://www.contori.com>

Login to Contori to enter and track your support issue through our quick and easy resolution system. To log in to Contori you will need a valid email address at your company and a password that will be set by you when you register at Contori.



# Installing the Kintana Demand Management Solution

The process for installing the Kintana Demand Management solution follows the standard Kintana patch process. For new Kintana customers, this process should be employed after the successful Kintana installation.

The patch will take between 30-40 minutes (depending on your machine speed) and will follow the basic timeline:

- Stop the Kintana server and start the process.
- 10 minutes
- Patch will prompt you to start the server
- 20-30 minutes
- Patch completes

Note

This version of Demand Management must be installed on top of Kintana 5.0. Upgrade to version 5.0 before running this installation.

## Patch Instructions:

1. Stop the Kintana server.
2. Download and extract the Demand Management patch.
  - a. Download kintana-500-DEM.jar. This is the patch and contains everything needed to install Demand Management.

- b. Move the patch bundle to your Kintana Home directory.
3. Patch Installation.
  - a. Change directory to the bin directory:

```
cd bin
```
  - b. Make sure you are running bash:

```
bash
```
  - c. Start patch installation

```
./kPatch.sh -i DEM
```
  - d. You will be prompted for the database password.
  - e. The filesystem and database will be updated with Demand Management (this can take several minutes).
4. Content Installation.
  - a. The patch will prompt you to start the server.
  - b. You will be prompted for a kintana username and password. Enter administrator username and password.
  - c. Demand Management Content is migrated into the instance (this will take approximately 5 minutes)
5. Restart the server.

When installation is complete, you will be prompted to restart the server.

# Chapter 3

## Key Concepts and Definitions

The following sections define the common concepts and terms related to configuring your Kintana Demand Management Solution. Knowledge of these terms will help the reader gain a more thorough understanding of Kintana Demand Management usage and configuration techniques.

The following topics are discussed:

- *What is Tracked as Demand?*
- *Field Groups*
- *Demand Field (Demand Category)*
- *Demand Set*
- *Workflow Step - Transitioning on Scheduling Event*
- *Dashboard Template*
- *Menu Security*
- *SLA*

### What is Tracked as Demand?

Kintana Demand Management enables you to capture, analyze and manage the demand placed on your organization. Kintana can be used to track and manage different types of Demand. These Demand Types can range from Bug Fix Requests to Requests for New Initiatives.

Demand Types in Kintana Demand Management correspond to specific Request Types that your organization has decided to manage using Demand

Management. These Request Types must be configured to work with Demand Management.

To enable a Request Type for use with Demand Management:

1. Select or create a Request Type.
2. Attach the Demand Management Field Groups to the Request Header Type. This is performed in the Request Header Type Workbench.
3. Configure the Demand Set to include the Request Type. This is performed by selecting Demand > Administration > Demand Sets from the Kintana menu (HTML interface).
4. Map the Request Type fields to the Demand Fields using the Administer Demand Set page.

Requests of that Request Type will now appear in Demand Portlets, demand scheduling and analysis tools, and report data.



Kintana provides a number of system Request Types and Workflows that are already configured to work with Demand Management functionality. You can use these system Request Types and Workflows or create your own.

## Field Groups

Field Groups are a set of fields that are delivered by Kintana to enable a quick solution implementation or to enable certain functions in Kintana. For example, Demand Management delivers a DEMAND MANAGEMENT SCHEDULING FIELDS field group to enable consistent tracking of information across multiple Demand Types. This field group is associated with a Request Type (through the Request Header Type) to enable the basic demand management features in Kintana such as demand scheduling and analysis.

For Demand Management, each Demand Type (Request Type) must be linked to the following Field Groups:

- Demand Management Scheduling fields: This field group allows a request to be scheduled with the Demand management solution



- (Optional) Demand Management SLA Fields: This field group contains the fields necessary to manage requests with SLA

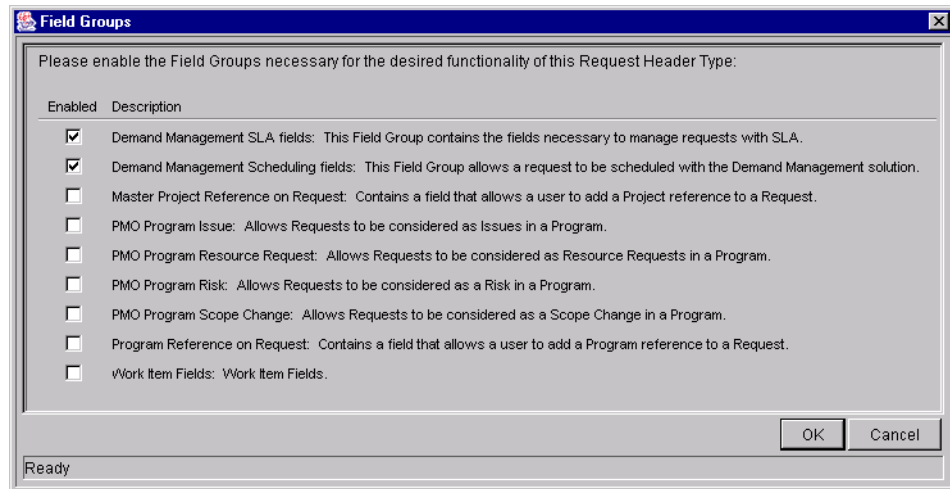


Figure 3-1 Field Groups Window on the Request Header Type Workbench

## Demand Field (Demand Category)

In order to successfully consolidate Demand across an organization's wide range of activities, you must track commonalities across the different types of demand. This is done by including common fields that can be normalized in each of the Demand Types. The fields that are common to all Demand Types are referred to as Demand Fields. In addition to providing a consistent, normalizeable set of Demand criteria, Demand Fields are also used to provide the user with visibility into their demand. For example, the Demand Fields are used as filters in the Demand Management portlets.

Demand Fields are introduced into your Demand Sets using the Administer Demand Set page. Using the Administer Demand Sets page, you can create new Demand Fields and then map them to fields in Request Types included in your demand system.

Ultimately, you need to have a set of Demand Fields that are consistently tracked across all of your Demand Types (Request Types). These fields are then mapped to fields on the Request Type.



Note

You can have a different set of Demand Fields for each Demand Set in your system.

## Search Validation

Search Validations are the validations associated with your Demand Fields used on search or portlet filter pages. Each Demand Field must have an associated Search Validation specified. The Search Validation can be the same Validation defined for a field.

Sometimes when working with Requests you need the Search Validation to be different than the validation in the Request form. An example of when this situation might occur is when your Request form has token dependencies between fields. Often you do not want these same dependencies in the search form. In this situation you could specify a validation that produced the same list but did not have the same dependencies. Another situation when Search Validations are useful is when you would like the a field to contain all values in a list when searching, but only enabled values on the Request form.

**Demand Set - Default Demand Set**

**Demand Set Info** Done Cancel

\*Name:   
 Description:   
 Enabled:  Yes  No Copy Delete

**Demand Fields** **Request Types**

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

Field Name	Search Validation
<input checked="" type="checkbox"/> Assigned User	DEM Filter - User Id - E
<input checked="" type="checkbox"/> Customer Type	DEM Filter - Customer
<input checked="" type="checkbox"/> Customer	DEM Filter - Customer
<input checked="" type="checkbox"/> Severity	DEM Filter - Severity (v)
<input checked="" type="checkbox"/> Source	DEM Filter - Source (wi)
<input checked="" type="checkbox"/> Type of Request	DEM Filter - Type of Re
<input checked="" type="checkbox"/> Estimated Start Date	Date
<input checked="" type="checkbox"/> Reject Date	Date
<input checked="" type="checkbox"/> SLA Level	Text Field - 200
<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

Add Field Done Cancel

## Demand Set

Different groups within your company may need to track different sets of demand. For example, your R&D department may need to track the demand from Product Bug and Enhancement requests, whereas the IS department may need to track demand from Help Desk requests. To enable this separation of demand, Kintana supports the creation of multiple Demand Sets.

Each Demand Set can include a unique group of demand fields and Demand Types (Request Types). The Demand Set can then have a unique mapping of Demand fields to Request Type fields. When the demand or team manager is scheduling or managing demand, they can select to see only the demand from their Demand Set.

## Workflow Step - Transitioning on Scheduling Event

You need to configure the Workflow to utilize the Demand Management functionality. The Schedule, Reject and Assign functions in Demand Management interact directly with the Kintana Workflows. When a Request or group of Requests is Scheduled, Rejected or Assigned, each of the Requests will check the current Workflow step. If the Workflow step has is configured with a scheduling-related transition, it will follow the transition out of the step. If the current Workflow step does not have this transition defined, no processing will happen, but the demand will still be marked as Scheduled, Rejected or Assigned.

## Dashboard Template

Users can import templates into their Kintana Dashboard. These templates are added as a new page (tab) on your Dashboard. Each template can consist of one or more Dashboard pages. Once imported, the user can personalize the pages to suit his specific business needs; for example, add, delete or personalize portlets.

Advance Kintana configuration experts can modify templates or create custom templates to be imported. For more information on working with templates, see "[Customizing the Kintana Interface](#)".

# Menu Security

Each user must have a Demand Management Standard License to access the Demand Management menus. Additionally, users must be given the following additional access grant to be able to access the Demand and Team Manager menus.

Demand Mgmt: Manage Demands

The Demand Management menus are defined XML files. Advanced users can customize these menus to provide alternate navigation, additional menu items, and alternate menu security. See "[Customizing the Kintana Interface](#)" for additional details.

# SLA

Kintana Demand Management tracks and reports on a predefined set of Service Level Agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time for items being managed using Demand Management. The SLAs are defined on the Request Type.

# Chapter 4

## Configuring Demand Management

To enable the full range of Demand Management features in Kintana, a number of Kintana, you need to configure a number of Kintana entities. This includes configuring:

- Request Types to include the Demand Management Field Groups.
- Workflows to include steps in the process for scheduling demand activities.
- Demand Sets to specify which fields on which Request Types are mapped to Demand Fields.
- User accounts and Security Groups to control who can access certain Demand Management functionality.
- Additionally, advanced configuration experts can customize the Demand Management menu and create custom templates.

This chapter provides instructions for the following topics related to configuring the Demand Management solution:

- *[Demand Management Configuration Overview](#)*
- *[Gathering Requirements for Demand Management](#)*
- *[Creating Demand Types \(Adding Request Types to Demand Management\)](#)*
- *[Configuring a Demand Set](#)*
- *[Configuring the Workflow for Demand Management](#)*
- *[Setting up the SLAs \(Validation and Rules\)](#)*
- *[Enabling User Access to Demand Management](#)*

# Demand Management Configuration Overview

This section provides an overview of configuring Demand Management.

1. Gather requirements for your Demand Management implementation. This includes determining which Request Types and Workflows will be used as well as the Demand Fields (categories) to be tracked in each Request Type.
2. Create the Demand Types. This includes configuring Request Types and their associated Request Header Types to include the Demand Management field group. This also includes configuring the SLAs in the Request Types.
3. Configure the Demand Set. This includes configuring the Demand Fields and mapping them to fields on each Demand Type (Request Type).
4. Enable user access to menus and templates.

## Gathering Requirements for Demand Management

Before configuring Kintana to enable Demand Management, you need to collect the following information:

- Determine the Demand Types.  
Decide which Request Types will be used to capture Demand. This can be existing Request Types, Request Types delivered as part of the Demand Management solution, or new custom Request Types developed on site.
- Determine the Demand Fields (Categories).  
Decide how you want to categorize your demand. This will translate into the Demand Fields (Demand Categories) For example, you may want to include a Demand Field for “Business Initiative.” You could then manage and analyze the demand based on the Business Initiative. Demand Fields need to be consistently tracked across all of your Demand Types (Request Types). These fields will be specified when creating a Demand Set and then mapped to fields on the Request Type.
- Determine your SLA requirements.
- Determine which Kintana Workflows will be used.  
Requests are routed through Kintana Workflow. Request Types will need

to be associated with these Workflows. Additionally, the Workflow will need to be modified to enable some demand scheduling features.

## Creating Demand Types (Adding Request Types to Demand Management)

Demand Types correspond to specific Request Types that your organization has decided to include in Demand Management. These Request Types must be configured to work with Demand Management.

To create a Demand Type, you need to perform two general operations:

1. Add the Demand Management Field Groups to the Request Type.
2. Add the Request Types to a Demand Set.



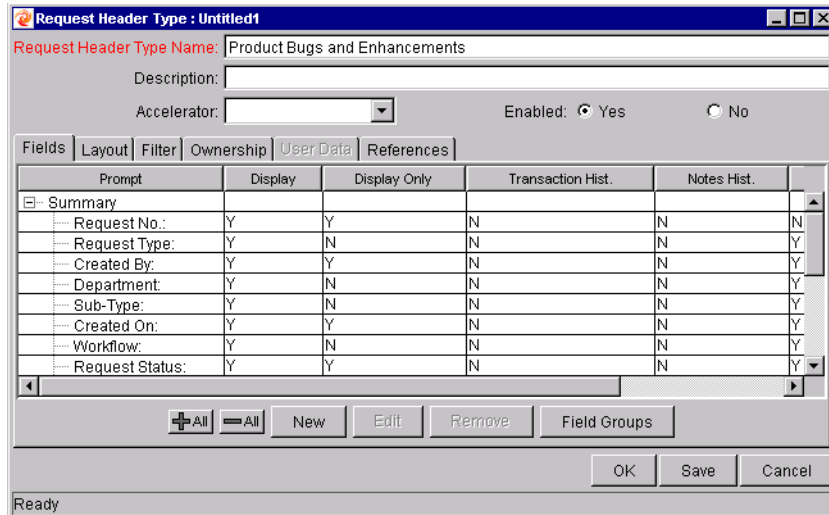
Note

A fresh Kintana installation consists of the following Demand Types:

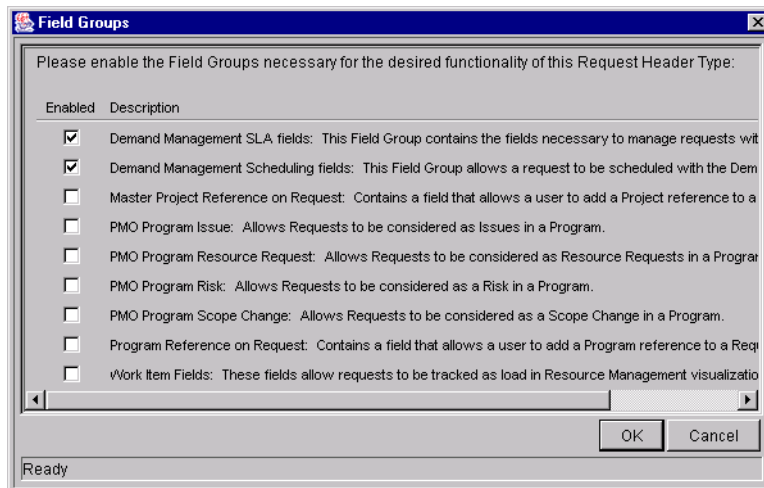
- DEM - Application Bug
- DEM - Application Enhancement
- DEM - Initiative
- DEM - Database Refresh

## Adding Demand Management Field Groups to a Request Type

1. Select or create a Request Type.
2. Open the REQUEST TYPE window.
3. Click **OPEN** under the REQUEST HEADER TYPE field. The specified REQUEST HEADER TYPE window opens.



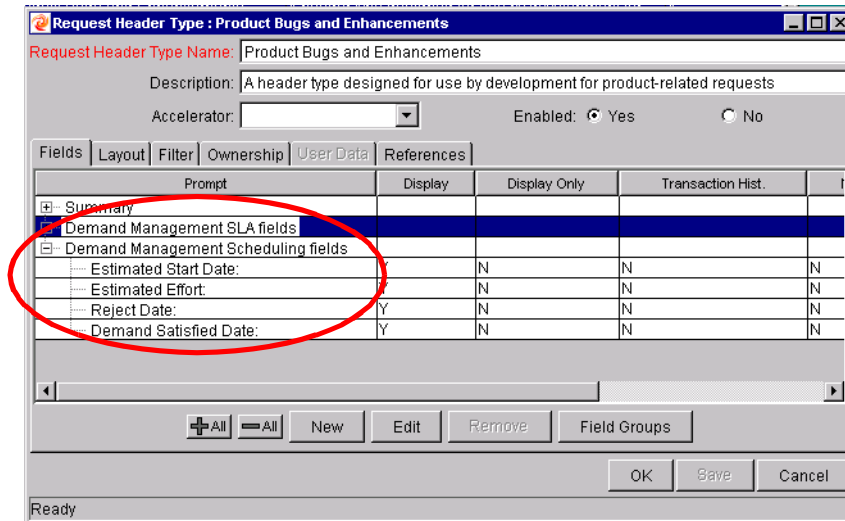
4. Click **FIELD GROUPS**. The FIELD GROUPS window opens.



5. Select the Demand Management Field Groups to attach to your Request Header Type.

6. Click **OK**. The selected field groups appear on the Request Header Type.





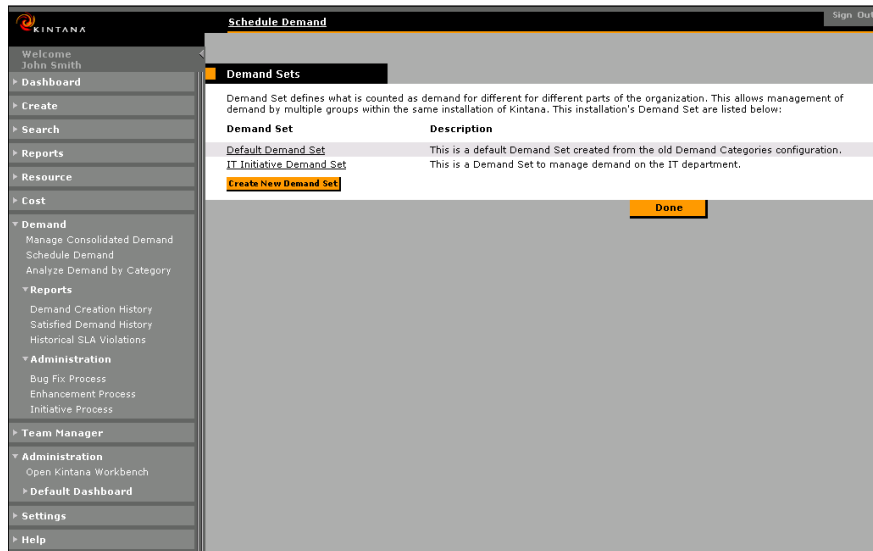
7. Save the Request Header Type and the Request Type.

## Add the Request Types to a Demand Set

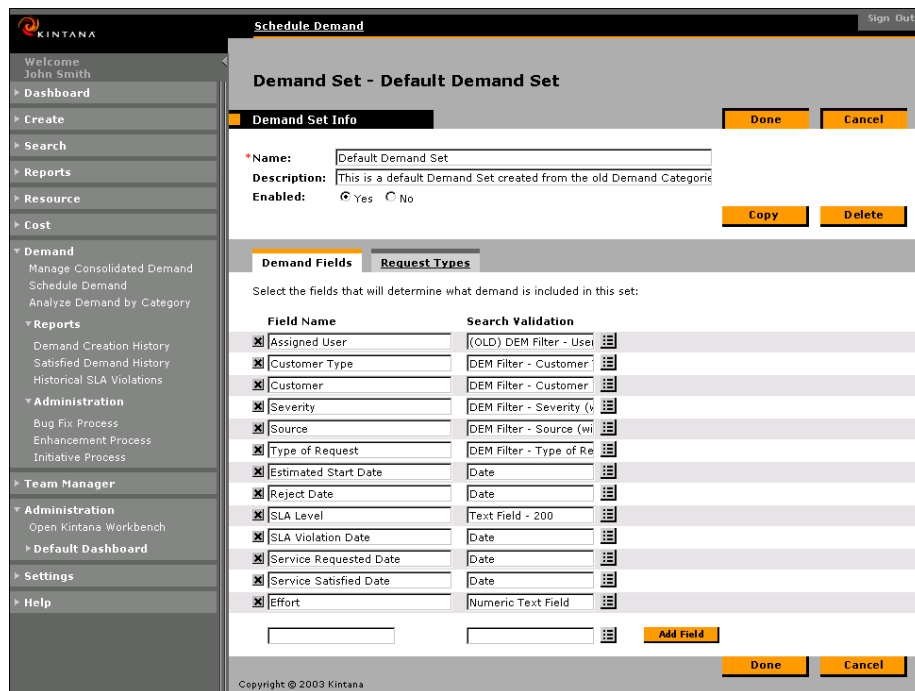
After configuring the Request Type to include a Request Header Type with the Demand Management Field Groups, you need to add the Request Type to a Demand Set.

To add a Request Type to a Demand Set:

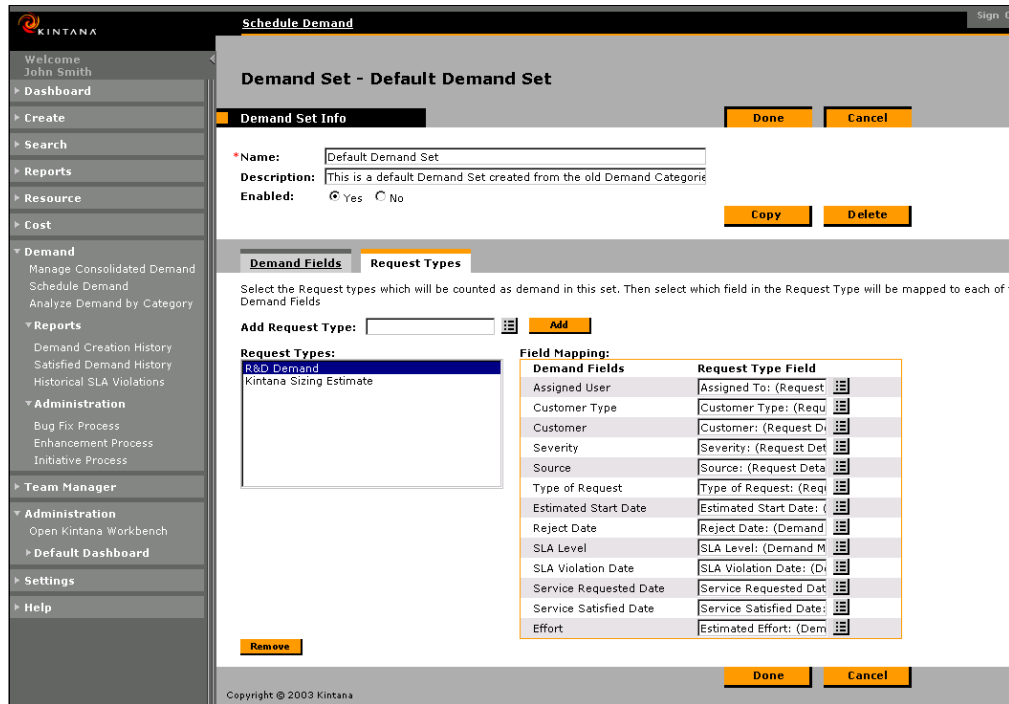
1. Click **DEMAND > ADMINISTRATION > DEMAND SETS** from the Kintana menu (HTML interface). The DEMAND SETS page opens.



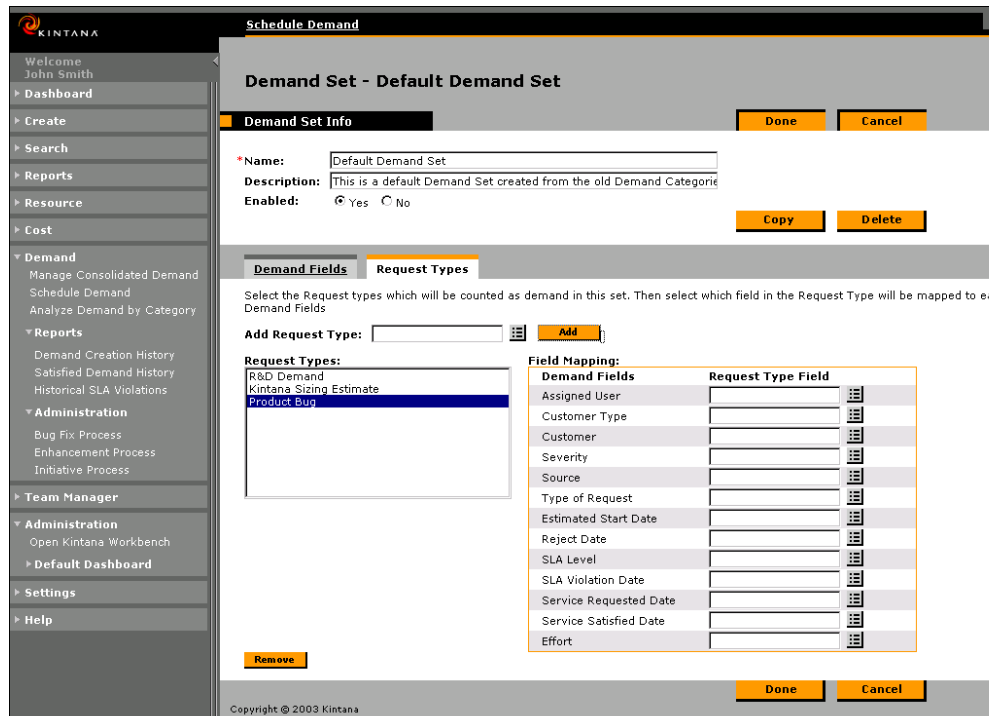
2. Click the Demand Set link to open an existing Demand Set. Click **NEW** to create a new Demand Set.



3. Click **REQUEST TYPES**.



- Select the Request Type to add from the ADD REQUEST TYPE field. Click **Add** to add it to the REQUEST TYPES list. The Request Type is added to the list and the FIELD MAPPING values are cleared.



5. Map the Demand Fields to fields on the Request Type. The Demand Fields should be mapped to Request Type fields with the same validation type. Additionally, the information stored in the fields should be similar across the multiple Request Types. This will allow you to obtain an accurate picture of demand across multiple demand types. For example, if you configure a Demand Field called “Effort” and map that to many Request Types, then the effort should be tracked using a similar measurement (for example, Days). Then, when viewing the demand “Effort” on your group using Demand Management’s visualizations, the information will be consistently displayed as “Days.”
6. Click Done to save your changes.

## Configuring a Demand Set

Configuring a Demand Set includes specifying the Demand Fields and mapping them to fields on each Demand Type (Request Type). See the following sections for detailed instructions:

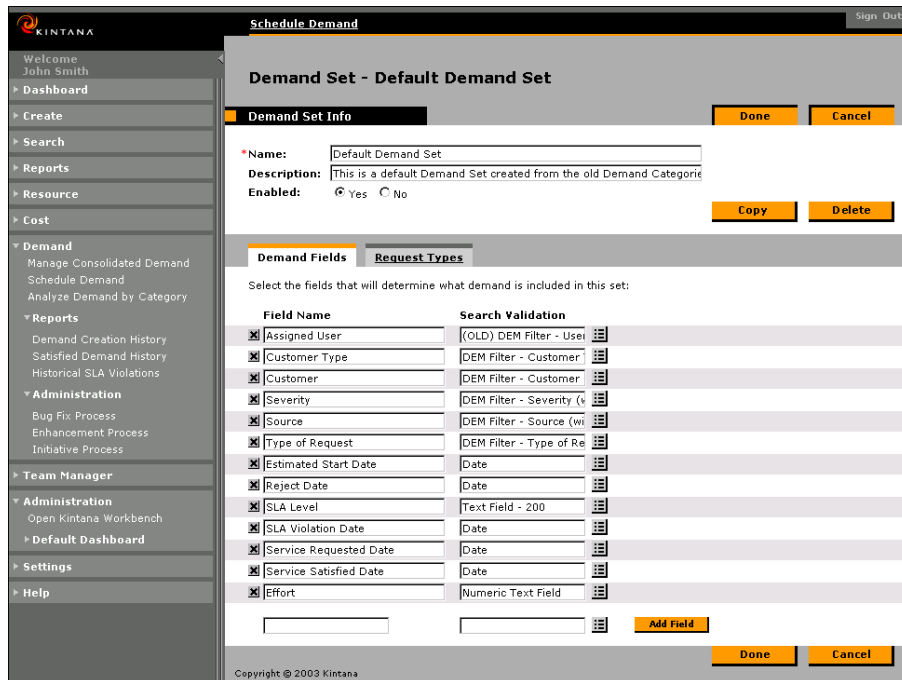
- [Creating Demand Fields \(Categories\)](#)
- [Adding Request Types to the Demand Set](#)
- [Mapping Demand Fields to Request Type Fields](#)

## Creating Demand Fields (Categories)

You can add or configure Demand Fields to be used across all Demand Types in your Demand Set. Demand Fields will be used throughout Demand Management. For example, Demand Fields are used to organize/display information in the Demand Management portlets. The Demand Categories appear as filtering categories and in the GROUPED BY drop down list in the DEMAND BY CATEGORY portlet.

To create a Demand Field:

1. Click **DEMAND > ADMINISTRATION > DEMAND SETS** from the Kintana menu (HTML interface). The DEMAND SETS page opens.
2. Click the Demand Set link to open the Demand Set.



3. Enter text into the blank field in the FIELD NAME column.
4. Select a SEARCH VALIDATION. See [“Search Validation”](#) on page 16 for more information.
5. Click **ADD FIELD**.

The Demand Field is now included in Demand Set. You will need to map the new Demand Field a Request Type field for each Request Type in your Demand Set.

## Adding Request Types to the Demand Set

Each Demand Set can contain multiple Demand Types (Request Types). See [“Add the Request Types to a Demand Set”](#) on page 23 for instructions.

## Mapping Demand Fields to Request Type Fields

After creating your Demand Fields and adding Request Types to your Demand Set, you need to map the Demand Fields to fields on each Request Type. Each Demand field must have an associated field mapping on the Request Type.

To map Demand Fields to Request Type fields:

1. Open the DEMAND SET page.
2. Click the Request Types tab. In the following figure, a new Request Type has been added to the Request Types list.

The screenshot shows the 'Schedule Demand' page in Kintana. The main content area is titled 'Demand Set - Default Demand Set'. It includes a 'Demand Set Info' section with fields for Name (Default Demand Set), Description (This is a default Demand Set created from the old Demand Category), and Enabled (Yes/No). Below this is the 'Request Types' section, which has two tabs: 'Demand Fields' and 'Request Types'. The 'Request Types' tab is selected, showing a list of request types: 'R&D Demand', 'Kintana Sizing Estimate', and 'Product Bug'. To the right of the list is a 'Field Mapping' table with two columns: 'Demand Fields' and 'Request Type Field'. The table lists various fields like 'Assigned User', 'Customer Type', 'Customer', 'Severity', 'Source', 'Type of Request', 'Estimated Start Date', 'Reject Date', 'SLA Level', 'SLA Violation Date', 'Service Requested Date', 'Service Satisfied Date', and 'Effort'. Each row has a dropdown menu to select a request type field. At the bottom of the page, there are 'Done' and 'Cancel' buttons.

3. Select a Request Type field for each Demand Field in the FIELD MAPPING section.



Note

Each Demand Field must be mapped to a Request Type field.

4. If you have added multiple Request Types or added a new Demand Field, then you will have to repeat the mapping process for each Request Type. Selecting the Request Type will update the Field Mapping Table to show the current field mappings.
5. Click **DONE** to save your changes.



Note

Mapping Demand Fields to Request Type fields requires Kintana to modify parameter columns in the database. If you are mapping fields for Request Types that have a large number of Requests currently in the system, this could take several minutes to move the existing Request data to the new columns.

Because of the scope of database changes, you should re-run the Database Statistics on your Kintana Database. Instructions for this are included in the Kintana System Administration Guide. Contact your System Administrator for help with this procedure.

## Configuring the Workflow for Demand Management

You need to configure the Workflow to utilize the Demand Management functionality. The Schedule, Reject and Assign functions in Demand Management interact directly with the Kintana Workflows.

When a Request or group of Requests is Scheduled, Rejected or Assigned, each of the Requests will check the current Workflow step. If the Workflow step has is configured with a scheduling-related transition, it will follow the transition out of the step. If the current Workflow step does not have this transition defined, no processing will happen, but the demand will still be marked as scheduled, rejected or assigned.

Demand Management includes an additional method for transitioning out of a workflow decision step that coincides with a demand scheduling event. Select **SPECIFIC EVENT** in the DEFINE TRANSITION window. You can then specify the specific event for the transition.

Demand Management supports the following events:

- Assignment
- Schedule Demand
- Reject Demand

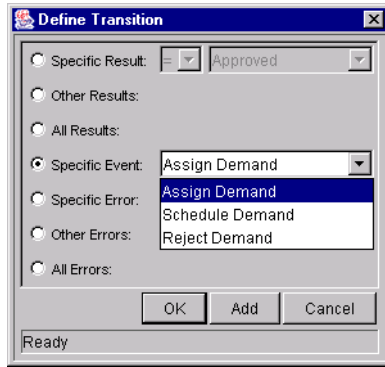


Figure 4-1 Specific Event Transition from a Workflow Step



Note

Notes / Exceptions to Request processing:

- This will not work if 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 demand.
- The user must have security permissions (Request Type and Workflow step) to transition out of the Workflow step.
- If the Request is locked (being edited) by another user, the scheduling, rejecting or assigning will not work. The user will receive appropriate errors explaining this.

If the scheduling, assignment, or rejecting do not work for one of the above notes reasons, the following page will open.

We were unable to schedule the demand listed below because it is currently being edited by someone else or the security is restricted. (KNTA-8877)

Demand									
Restricted by Security									
Req #	Demand Type	Priority	Estimated Effort	Scheduled Start	Demand Disposition	Requestor Location	Assigned Group	Assigned User	
12345	At vero eos et	High	10		Current	At vero eos et	At vero eos et		
23456	accusamus	High	24		Current	accusamus et	accusamus et		
34567	et iusto odio	High	45	Aug 01, 2002	Scheduled	iusto odio	iusto odio	jmorace	
45678	dignissimos ducimus...	Medium	65	Jan 29, 2002	Backlog	dignissimos ducimus, qui	dignissimos ducimus, qui	jmorace	

Currently In Use									
Req #	Demand Type	Priority	Estimated Effort	Scheduled Start	Demand Disposition	Requestor Location	Assigned Group	Assigned User	
12345	At vero eos et	High	10		Current	At vero eos et	At vero eos et		
23456	accusamus	High	24		Current	accusamus et	accusamus et		
34567	et iusto odio	High	45	Aug 01, 2002	Scheduled	iusto odio	iusto odio	jmorace	
45678	dignissimos ducimus...	Medium	65	Jan 29, 2002	Backlog	dignissimos ducimus, qui	dignissimos ducimus, qui	jmorace	

**OK**



## Setting up the SLAs (Validation and Rules)

Service Level Agreements (SLAs) can be set up using the Request Type rules and Validations. SLAs can be enabled for all Demand Types, although in the default installation SLAs are only enabled for the Database Refresh Demand Type. This section presents the Database Refresh SLA configuration as an example.

### SLA Behavior (Example)

The SLA behavior is driven by 4 fields in the Request Type:

- Service Requested On
- SLA Level
- Request Satisfied On
- SLA Violation Date

The Service Requested On value is set when the Request is logged. The user then sets the SLA Level in the Request. When they select the SLA Level the Request SLA Violation date is calculated. If the Request is not “satisfied” before the SLA Violation date, an SLA exception is triggered.



Note

The Service Requested On does not have to correlate to the Request creation date. For example, the customer’s SLA might be based on the time it takes to implement a bug fix following bug approval (rather than the bug creation).

The Request Satisfied On does not necessarily correlate to the end of the Request resolution process. The demand can be set to “satisfied” at any point in the process.

### SLA Set Up – Rules

The SLA behavior is based on the following rules and workflow configurations.



Note

We recommend using a validation to store the SLA configuration information. It will be easier for the customer to alter the validation, rather than having to modify SQL. You should use one validation per Request Type with an SLA.

The validation for the Database Refresh example is shown below. The following rules refer to this validation.

Validation: DEM - SLA Level: DB Refresh

Name: DEM - SLA Level: DB Refresh

Description:

Enabled:  Use in Workflow?

Component Type: Auto Complete List

Validated By: List

Validation Values:

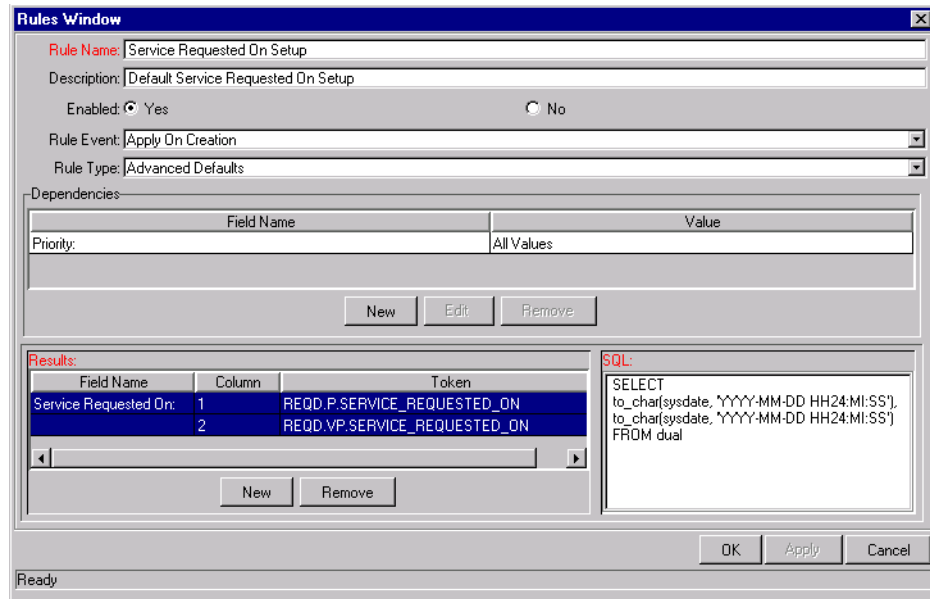
Seq	Code	Meaning	Description	Enabled	Default
1	1	Critical - 3 Days	3	Y	N
2	2	High - 5 Days	5	Y	N
3	3	Medium - 15 Days	15	Y	N
4	4	Low - 30 Days	30	Y	N

New Edit Delete Copy From ↑ ↓

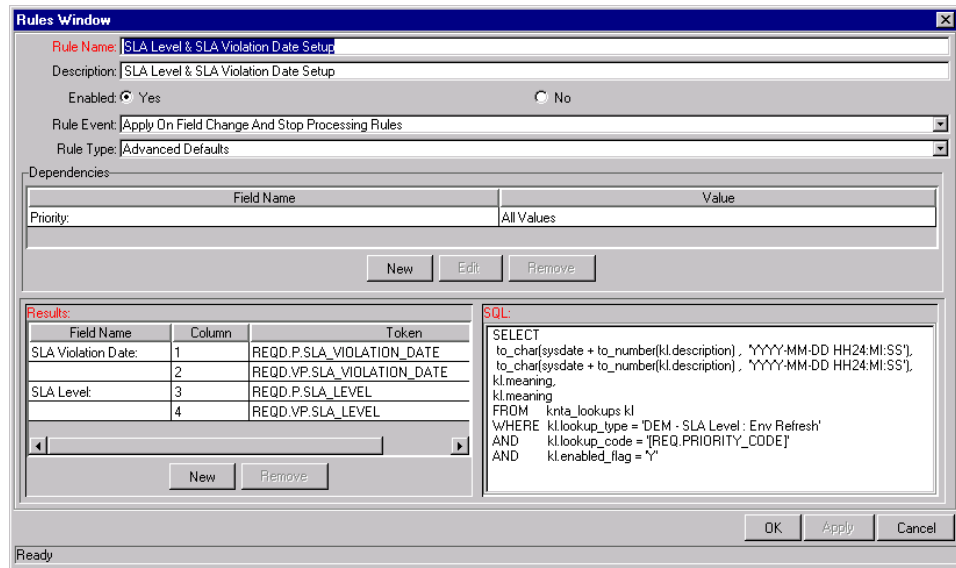
Used By Ownership OK Save Cancel

Ready

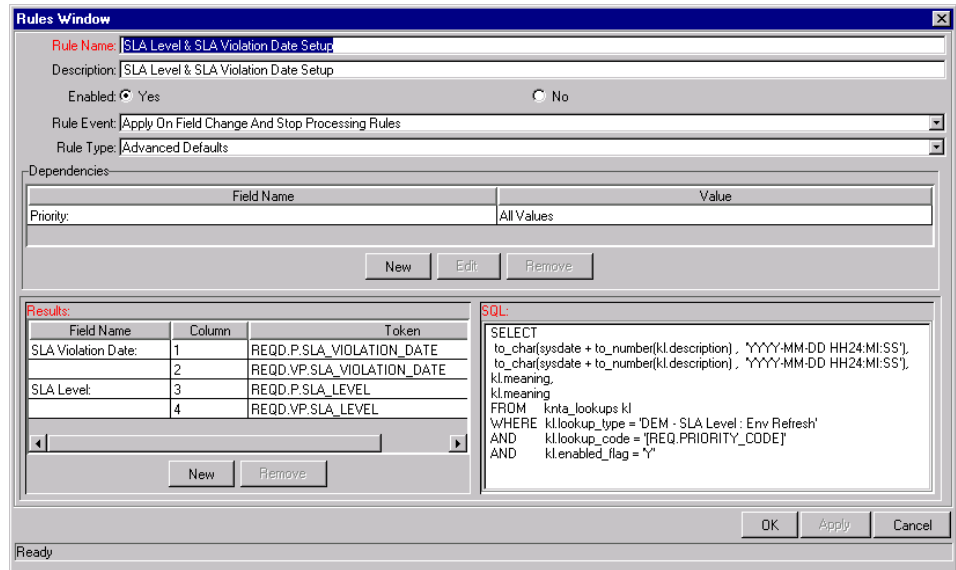
- **Service Request On:**  
Set by a Rule to the creation date (in this example) of the Request. The Service Requested On could be set to correlate with any workflow step.



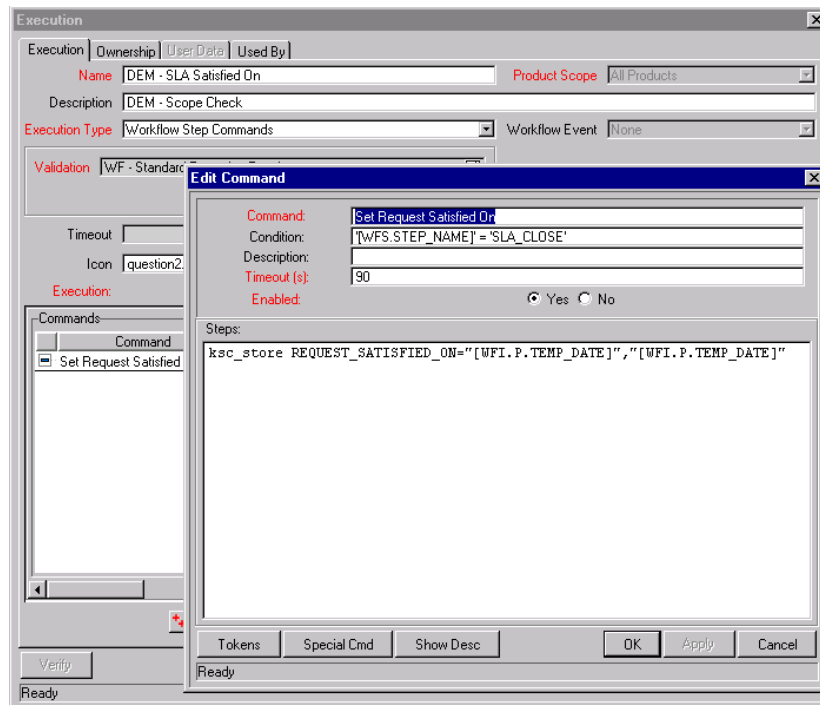
- **Service Level:**  
Set by a Rule based on the priority of the Request.



- **SLA Violation Date:**  
Set by a Rule based on the Service Level and Service Requested On values. The SLA Violation Date = (Service Requested On date) + (time dictated by the Service Level stored in the description column of the validation).



- Service Satisfied On:**  
 Set by an execution Workflow Step in the resolution process. In the Database Refresh Workflow, this value is set in the SLA Close step.



# Enabling User Access to Demand Management

Using standard Kintana data and process security techniques, you can control which users can access Demand Management functionality. See the following section for instructions on controlling access to a specific interface or feature:

## Enabling General Access

Each user must have a Demand Management Standard License to access the Demand Management features. Additionally, users must be given the Demand Mgmt: Manage Demands access grant to be able to access the Demand and Team Manager menus.

## Controlling Template Access

You can control which users can access a specific template by specifying Access Grants required for that template. If the Access Grant is not linked to the user, then he can not add the template to his Dashboard.

This is configured in the Kintana template file. Advanced users can create and edit templates. The template's structure and data are defined in an xml file located in the following directory:

```
web\knta\global\tab_templates\
```

Each template is defined in its own xml file.

You can select the Access Grants required to access a template by using the `<access_grant></access_grant>` tags within the `<access_type>` section of the template structure. In the example shown below, the tags have been added to the template structure for a given template.

```
<access_type>
  <license_type>Demand Management</license_type>
  <access_grant>Manage Demands</access_grant>
  <access_grant>Manage Requests</access_grant>
</access_type>
```

This code segment shows that only users with either the Manage Demand or Manage Requests Access Grants have the right to import this template into their Kintana Dashboards. All other users will be restricted from importing the template.

## Controlling Menu Access

Menus in the Kintana HTML interface can be customized. Each Solution menu is defined in its own xml file. The Demand Management and Team Member menu structures and data are defined in the following xml files located at:

```
web\knta\global\menus\demand_manager.xml
```

```
web\knta\global\menus\it_manager.xml
```

A sample menu is shown in [Figure 4-2](#) with the Demand and Team Manager expanded. The elements of the menu are highlighted in the figure.

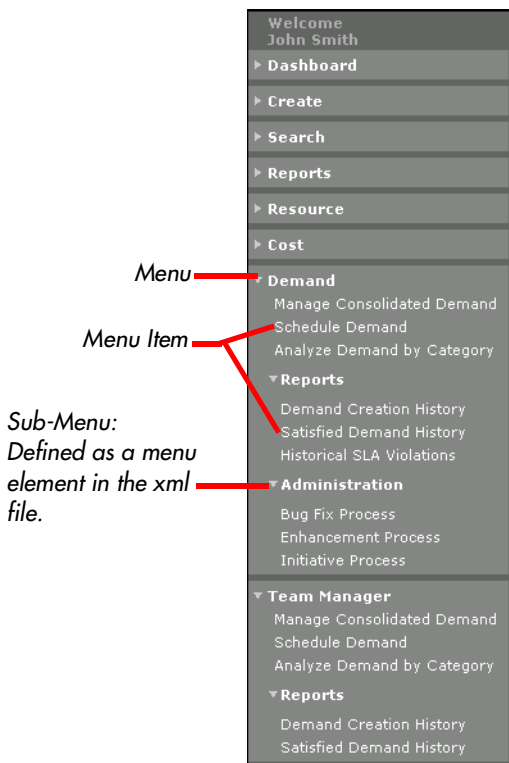


Figure 4-2 Kintana Menu (Navigation bar)

[Figure 4-3](#) highlights the element of the xml menu file used to control menu access. It also provides an example of the menu and menu\_item elements shown in [Figure 4-2](#).

Specify the license or access grant required to see a menu or menu item.

```
<menus seq="100">
  <title>Demand</title>
  <access_type>
    <license_type>Demand Management</license_type>
    <access_grant>Manage Demands</access_grant>
  </access_type>
  <menu_item>
    <display_text>Manage Consolidated Demand</display_text>
    <url>../dem/ConsolidatedPictureOfDemand.jsp</url>
  </menu_item>
  <menu_item>
    <display_text>Schedule Demand</display_text>
    <url>../dem/ScheduleDemand.jsp</url>
  </menu_item>
  <menu_item>
    <display_text>Analyze Demand by Category</display_text>
    <url>../dem/DemandByCategory.jsp</url>
  </menu_item>
</menus>
```

Figure 4-3 Section of the Demand Management menu xml file

You can control which users can view menus, sub-menus, and menu items. This is controlled by including the `<access_type>` `</access_type>` tag within the menu or menu item that you would like to restrict.

The location of the `<access_type>` tag determines which element is controlled: menu, sub-menu, or menu item:

- If the `<access_type>` section is placed anywhere directly within the `<menu>` `</menu>` section (i.e. not in the `<menu_item>` `</menu_item>` section), it will restrict access to that menu. See [Figure 4-3](#) for an example of this.
- If the `<access_type>` section is placed anywhere within a `<menu_item>` `</menu_item>` section, it will restrict access to that menu item. In the following example, only users with a Kintana Create Standard Licence and the Manage Request or the Manage Package access grants would see this menu item.

```

<menus seq="100">
  <title>Demand</title>
  <access_type>
    <license_type>Demand Management</license_type>
    <access_grant>Manage Demands</access_grant>
  </access_type>
  <menu_item>
    <display_text>Manage Consolidated Demand</display_text>
    <url>../dem/ConsolidatedPictureOfDemand.jsp</url>
  </menu_item>
  <menu_item>
    <display_text>Schedule Demand</display_text>
    <url>../dem/ScheduleDemand.jsp</url>
    <access_type>
      <license_type>Kintana Create</license_type>
      <access_grant>Manage Requests</access_grant>
      <access_grant>Manage Packages</access_grant>
    </access_type>
  </menu_item>
  <menu_item>
    <display_text>Analyze Demand by Category</display_text>
    <url>../dem/DemandByCategory.jsp</url>
  </menu_item>
  <menu>
    <menu_title>Reports</menu_title>
    <menu_item>
      <display_text>Demand Creation History</display_text>

```

- If the <access\_type> section is placed within a <menu> </menu> section that defines a sub-menu, it will restrict access to that sub-menu. In the following example, only users with a Kintana Create Standard Licence and the Manage Request or the Manage Package access grants would see the Administration sub-menu.

```

</url>
  </menu_item>
</menu>
<menu>
  <access_type>
    <license_type>Kintana Create</license_type>
    <access_grant>Manage Requests</access_grant>
    <access_grant>Manage Packages</access_grant>
  </access_type>
  <menu_title>Administration</menu_title>
  <menu_item>
    <display_text>Bug Fix Process</display_text>
    <url>javascript:openWorkbench('&screen=WF&pkname=DEH--+Bug+Request+Workflow');</url>
  </menu_item>
  <menu_item>
    <display_text>Enhancement Process</display_text>
    <url>javascript:openWorkbench('&screen=WF&pkname=DEH--+Enhancement+Request+Process');</url>
  </menu_item>
  <menu_item>
    <display_text>Initiative Process</display_text>
    <url>javascript:openWorkbench('&screen=WF&pkname=DEH--+Project+Initiative+Process');</url>
  </menu_item>
</menu>
</menus>

```

See "[Customizing the Kintana Interface](#)" for additional details and examples.



## Controlling Demand Management Configuration Access

Kintana allows you to set security around Kintana configuration. You can establish configuration security around all of the Kintana configuration entities. This includes such activities as controlling:

- Who can change the Workflow.
- Who can change Request Types
- Who can change the User and Security Group definitions.

See the "[Kintana Security Model](#)" for details on controlling who can alter your Kintana configurations.

## Estimated Effort in Demand Management

Demand can be analyzed based on the pure number (count) of demand requests. Demand can also be normalized based on effort. For example, you may have 10 Requests for Database Refreshes and 10 Requests for Bug Fixes logged in your system. If a Database Refresh takes 1 hour to fulfill and it takes 2 days to fix a bug, it may be more meaningful for the organization to factor in the effort involved in fulfilling this demand. Effort could default based on Request Type and be reconfirmed during an analysis phase at a later step in the process.



Note

Customers may not want to consider effort in their Demand Management setup. In this case, default the effort to 1. This will result in a one to one mapping of effort to count.

The following are a few examples of how you can set the default estimated effort in the 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.

# Customizing Menus and Templates

Kintana's templates and menus are delivered as xml files on the Kintana file system. Users can customize templates and menus by creating new files or altering existing xml files. See "[Customizing the Kintana Interface](#)" for a description of the main elements of the template and menu files and instructions for modifying them.

# Appendix

# A

## Upgrade Notes

This appendix discusses upgrade impacts when upgrading from a pre-5.0 version of Kintana Demand Management. The following topics are discussed:

- *Licensing*
- *Customized Menus and Templates*
- *Request Types and Field Groups*
- *Mis-configured SQL in Some Portlets*
- *Viewing the Upgrade Log*

## Licensing

Kintana's Demand Management Solution is now licensed on a per-user basis. Additionally, Kintana has introduced a new Access Grant that controls access to Demand Management menus and functionality. To enable users to continue using Kintana's Demand Management functionality, you will need to perform the following actions after the upgrade:

- Assign a Demand Management license to each user that needs to access the functionality.
- Associate users with the Demand Mgmt: Manage Demands Access Grant (add the grant to a security group and associate the appropriate users with the security group)



If users are not issued a license and the correct Access Grants before logging into Kintana 5.0, they may lose any Dashboard personalizations that they have configured.

## User Inclusion into the 'Kintana Demand Manager' Security Group

The Kintana 5.0 upgrade attempts to place the appropriate users into a Security Group with access to Demand Management functionality.

The 5.0 upgrade assumes that all the users of Demand Management either have "Demand Manager" or "Team Manager" tab in their Dashboard. If users do not have these tabs or have renamed these tabs, these users will not get security for accessing the Demand Management portlets. As a result, they will lose their Demand Management Portlets when they logon to Kintana for the first time after the upgrade.

To avoid this problem, immediately after the upgrade and before releasing the system to the users, the Kintana Administrator should verify all the users of Demand Management have been included in the "Kintana Demand Manager" security group. To verify this:

1. Logon to the Kintana Workbench
2. Open the SECURITY GROUPS Workbench.
3. Locate and open the "Kintana Demand Manager" Security Group.
4. Click on the **USERS** tab.

The users tab will show all the users who belong this security group.

## Customized Menus and Templates

If you have customized your Kintana Menus or Dashboard Templates, you will need to reapply your customizations to the new menu and templates delivered with Kintana 5.0. The upgrade backs up the existing menus and templates and installs the new menu and templates.



Kintana's templates and menus are delivered as xml files on the Kintana file system. Users can customize templates and menus by creating new files or altering existing xml files. See "[Customizing the Kintana Interface](#)" for a description of the main elements of the template and menu files and instructions for modifying them.

## Request Types and Field Groups

The upgrade will also modify some of your configuration data – specifically, your Request Header Types and Request Types. The Kintana 5.0 upgrade will analyze your current demand management configuration and from that create a default Demand Set. To do this, Field Groups (new in Kintana 5.0) will be associated with Request Types in your Demand Set.

End users will not notice a difference, but the methods for modifying your configuration will change. Instructions for configuring your Demand Management system are included in this document.

## Mis-configured SQL in Some Portlets

After the 4.6 to 5.0 upgrade some of the Demand Management portlets may have mis-configured SQL or SQL errors. Although the Kintana upgrade handles most 4.6 to 5.0 portlet conversions properly, you may experience errors if your 4.6 configuration had custom demand categories. If this is the case, the first time the user logs onto Kintana, their Demand Management portlets will display an error.

This problem can typically be solved by simply editing and saving the the Demand Management Portlet. If this does not eliminate the error, the user will have to edit the portlet and act on each auto-complete list: re-selecting the same values and saving the personalization again. In extremely rare situations the users may have to delete the portlet and add it back again. Before deleting the portlet, it is a good idea to make a note of the current personalization filters.

## Viewing the Upgrade Log

Any errors encountered during the upgrade will be noted in the following file:

```
<Kintana_Home>/upgrade_500/logs/<number>/postSeedDriver500.log
```

You should check this file for potential errors after your upgrade.

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