

HP Project and Portfolio Management Center

Software Version: 8.00.01

HP Demand Management User's Guide

Document Release Date: August 2009

Software Release Date: August 2009



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- Software version number, which indicates the software version
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Contents

1	Getting Started with HP Demand Management	9
	Introduction to HP Demand Management	9
	Overview of an HP Demand Management System	10
	Requests, Request Types, and Request Status	12
	Workflows and Workflow Steps	12
	Request Processing and Data Integrity	13
	Working with HP Demand Management on a Multilingual PPM Center Instance	14
	Related Documents	16
2	Creating Requests	17
	Overview of Creating Requests	17
	Creating a Request	19
	Creating Requests from the Menu Bar	20
	Creating Requests from the References Section	23
	Creating Requests by Copying Requests	25
	Assigning Resources to Requests	27
	Assigning Resources from the Summary Section of the Request Detail Page	27
	Allocating Resources from the Resources Section of the Request Detail Page	30
	Overview of Adding References to Requests	31
	Adding References to Requests	32
	Adding Attachments as References	32
	Adding Existing Packages as References	33
	Adding New Packages as References	34
	Adding Programs as References	36
	Adding Projects as References	37
	Adding Releases as References	38
	Adding Existing Requests as References	39
	Adding New Requests as References	40

Adding Tasks as References	41
Adding URLs as References	42
3 Viewing Requests	43
Overview of HP Demand Management Requests	43
Opening a Request	46
Request Details Page, Top Section	47
Request Detail Page, Header Section	49
Request Detail Page, Details Section	50
Request Detail Page, Notes Section	51
Request Detail Page, Resources Section	51
Request Detail Page, Status Section	53
Request Detail Page, Graphical View	54
Request Detail Page, Approval Details	56
Request Detail Page, Transaction Details	57
Request Detail Page, Request Execution Log	58
Request Detail Page, References Section	58
Predecessor Relationships	63
Successor Relationships	63
Finish/Finish Predecessor Relationships	63
4 Processing and Managing Requests	65
Overview of Processing and Managing Requests	65
Searching Requests	66
Conducting Basic Request Searches	66
Conducting Advanced Request Searches	68
Using the Query Builder to Search Requests	69
Request Query Components	69
Using the Request Browser to Search Requests	71
Opening and Updating Requests	72
Opening Requests from Portlets	73
Opening Requests from Email Notifications	73
Mobility Access For Decision Workflow Step Notifications	74
Acting on a Workflow Step from Your Email Inbox	74
(Windows Systems) Mobility Access in a Multilingual User Interface Context	77
Responding to Notifications from a Handheld Device	77
Mobility Access Response Processing	78
Opening Requests from the Menu Bar	78
Performing a Basic Request Edit	79

Editing Requests Simultaneously	83
Example: Two Users Editing Fields	83
Example: Two Users Editing Fields Plus Workflow Action	84
Example: Parallel Workflow Steps	84
Quick Edits: Editing Multiple Requests at the Same Time	85
Considerations for Performing Quick Edits	85
Performing Quick Edits	87
Mass Updates: Acting on Multiple Requests at the Same Time	89
Considerations for Performing Mass Updates	89
Performing Mass Updates	91
Managing Requests	93
Reopening Closed Requests	93
Deleting Requests	94
Cancelling Requests	95
Printing Requests	96
Purging Requests	96
Using Demand Management Reports to Monitor Requests	97
Creating an HP Demand Management Report	99
Managing Requests Using Portlets	100
5 Integrating Requests and Projects	105
Overview of Integrating Requests and Projects	105
Referencing Requests from Tasks	106
Visibility into Tasks and Requests	108
6 Demand Manager Page	109
Overview of the Demand Manager Page	109
Portlets on the Demand Manager Page	111
Consolidated Demand Portlet	111
Demand by Department Portlet	112
Demand by Business Initiative Portlet	113
SLA Exceptions by Department Portlet	114
Initiatives Pending Approval Portlet	115
Setting Portlet Preferences	116
Index	117

1 Getting Started with HP Demand Management

Introduction to HP Demand Management

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

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

This document contains the following information:

- In HP Demand Management, requests are the means by which actions and processes are initiated and driven. Requests contain all of the information required to take a series of actions that move requests through a workflow. [Chapter 3, *Viewing Requests*, on page 43](#) presents information about the major features of HP Demand Management requests.
- You can use HP Demand Management to submit several different types of requests, from simple software defect requests to project scope change requests. [Chapter 2, *Creating Requests*, on page 17](#) provides details on how to create these.

- After you create a request, you process and manage it. [Chapter 4, *Processing and Managing Requests*, on page 65](#) provides instructions on how to open and update requests, and how to use reports and portlets to manage them.
- HP customers who have both HP Demand Management and HP Project Management can integrate HP Demand Management's request tracking capability with HP Project Management's deliverable date and actuals tracking capabilities. [Chapter 5, *Integrating Requests and Projects*, on page 105](#) presents information on how to integrate and work with tasks and requests.
- HP Demand Management supplies a preconfigured page that demand managers can use to monitor and manage requests. [Chapter 6, *Demand Manager Page*, on page 109](#) provides descriptions of this page and the portlets it displays.

Overview of an HP Demand Management System

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

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

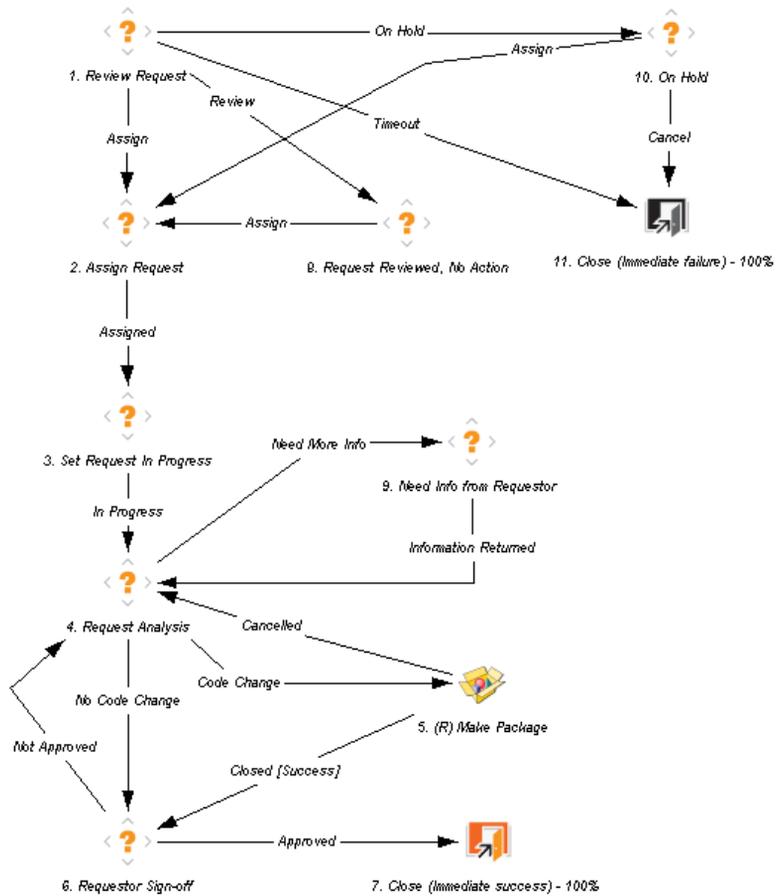
After you create a request, it must follow a process to reach its conclusion. A workflow is the process a request takes to reach its conclusion. Workflows consist of workflow steps, and each workflow step corresponds to a decision or action.

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

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

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

Figure 1-1. Requests and workflows



Requests, Request Types, and Request Status

The request detail page displays all of the information required to complete a specific business process. Each request has an associated *request type*, such as the Bug request type or the Enhancement request type. The request type determines the basic features of the request, such as the fields it includes, its participants, and the workflow it follows.

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

Workflows and Workflow Steps

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

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

- **Decisions.** In decision workflow steps, a user or group must make a decision or take some action, such as approve a request or complete a task. A decision workflow step is manually updated to indicate that the resource made the decision or performed the action appropriate at that step.
- **Executions.** In execution workflow steps, the system performs an action, and then updates the workflow step with the results. An execution can be as simple as calculating the value for a token or as complex as creating packages or updating Web pages. Execution workflow steps are automatically updated to reflect the outcome of the action.

- **Conditions.** Condition workflow steps are logic steps, and can include AND/OR statements. Condition workflow steps are used for complex workflow processing, such as requiring that all inputs reach a workflow step before the process can continue to the next step.
- **Subworkflows.** Subworkflow workflow steps are small, self-contained workflows used by the workflow associated with the request.

Request Processing and Data Integrity

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

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

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

Working with HP Demand Management on a Multilingual PPM Center Instance

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

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

- Each configuration entity stores the language in which it was initially defined (its *definition language*). When you create a new configuration, its definition language is automatically set to your current session language.

To protect the integrity of configuration business logic, you can only modify a configuration entity in the same language in which it was defined. (Translations of the configuration attributes are managed separately through the translation management tools that PPM Center provides.)

- If an entity is defined in a language other than your session language, you cannot edit the entity in that PPM Center session. If you need to update the business definition of the entity, you must first log off, and then log on and select the entity's definition language as your session language. Alternatively, you can change the entity's definition language if the business definition of the entity can be maintained in the new language going forward.
- If you copy an entity from the PPM Workbench, in most cases you can copy any translations that exist for the entity. It is important to note that the entity you created as a result of the copy action has its definition language automatically set to your current session language, even if the original entity had a different definition language.
- If appropriate translations exist in the system, users see custom configuration attributes displayed in their respective languages in the PPM Center standard interface. If no translations exist in the user's current session language for a given custom attribute, then the attribute is

displayed in its original definition language. (This is known as display language *fallback*.)

- If appropriate translations exist in the system, users receive notification messages in their respective languages. If a translation does not exist in a user's language, then the user receives the notification message in its definition language.

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

Related Documents

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

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

2 Creating Requests

Overview of Creating Requests

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

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

Figure 2-1 on page 18 shows the main sections of a request detail page. The following are the main sections on a request detail page:

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

Figure 2-1. Request detail page

Dashboard ▾ Open ▾ Search ▾ Create ▾ My Links ▾ History ▾ ☆
Search menus or entities...

Create New DEM - Application Enhancement > Dashboard - NS - DM Portlets > Search Requests > Search Results > Request #31923

[Printable Version](#)
Result 1 of 1

DEM - Application Enhancement - #31923

Description: Add new product codes

Request Status: New [\(View Full Status Below\)](#)

Available Actions

Initial Review

Resolution Pr...
Assign
More Info Req...
Schedule
Reject

[Make a Copy](#) [Delete](#)

[Expand All](#) [Collapse All](#) [Save](#)

Header

Summary

Request No.:	31923	Requested By:	Admin User
Request Type:	DEM - Application Enhancement Change	Created On:	August 25, 2009
Workflow:	DEM - Enhancement Request Process	Request Status:	New
Assigned To:	<input type="text" value="Eleanor Grady"/>		
Assigned Group:	<input type="text"/>		
Requestor Department:	<input type="text" value="Order Entry"/>		
*Priority:	<input type="text" value="Normal"/>	Application:	<input type="text" value="CSM App"/>
*Description:	<input type="text" value="Add new product codes"/>		

Details

- [Enhancement Details](#)
- [Analysis](#)
- [Demand Management SLA Fields](#)
- [Demand Management Scheduling Fields](#)
- [Notes](#) No Notes Exist
- [Status](#)

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Initial Review (View Available Actions)		August 25, 2009 12:29:25 PM PDT
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design			
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (immediate success)			
19	Close (immediate failure)			

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

References

[Make a Copy](#) [Delete](#)

[Save](#)

For more information about request detail pages, see [Viewing Requests](#) on page 43.

Creating a Request

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

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

For information about how to create a request from HP Project Management, see [Integrating Requests and Projects](#) on page 105. For information about how to create a request from HP Deployment Management, see the *HP Deployment Management User's Guide*.

Creating Requests from the Menu Bar

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



If your PPM Center instance supports multiple languages, remember that configuration entities can only be modified in the language in which they were initially defined. When you create a new configuration, its definition language is automatically set to your current session language. For more information, see the *Multilingual User Interface Guide*.

To create a request:

1. Log on to PPM Center.
2. On the **Create** menu, click **Request**.

The Create New Request page opens.

Project and Portfolio Management Center

User: Admin User | Sign Out

Dashboard ▾ Open ▾ Search ▾ Create ▾ My Links ▾ History ▾ ☆

Search menus or entities...

Dashboard - Front Page > Search Requests > Search Results > Request #30031 > Create Request

Create New Request

*Request Type:

Create Based On Desired Action

Most Recently Created
Bug

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

The request type you select depends on your licenses and access grants, and on the security groups to which you are assigned. To save you time, the **Create Based on Desired Action** section lists the most recently created request types.

4. Click **Create**.

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

Create New DEM - Application Bug

Expand All Collapse All Submit Cancel

Header

Summary

Requested By: Admin User
Request Status: Unreleased

Workflow: DEM - Bug Request Workflow ?

Assigned To: [Text Field] [User Icon] [Clear Icon]

Assigned Group: [Text Field] [List Icon] [Help Icon]

Requestor Department: [Dropdown]

Priority: [Dropdown] [Help Icon] Application: [Text Field] [List Icon]

Description: [Text Field]

Details

Problem/Resolution

Problem: [Text Field]

Business Area Affected: [Dropdown] Required Date: [Text Field] [Calendar Icon] [Help Icon]

Source: [Dropdown] Source Category: [Dropdown]

Reproducible: Yes No [Help Icon]

Steps to Reproduce: [Text Field]

Resolution: [Dropdown]

Solution: [Text Field]

Environment

Analysis

Project Information

Demand Management SLA Fields

Demand Management Scheduling Fields

Notes

References

Submit Cancel

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

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

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

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

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

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

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

You can reference a Web-accessible file or attach a document or file from your local machine to the current request. You can also reference packages, tasks, and other requests. For more information on how to add references, see *Overview of Adding References to Requests* on page 31.

9. Click **Submit**.

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



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

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

After you submit a new request, HP Demand Management assigns it an initial status, such as New, and then routes it along a standard business process of approvals, decisions, and actions, depending on the associated workflow. For more information, see *Processing and Managing Requests* on page 65.

Creating Requests from the References Section

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



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

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

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

The Search Requests page opens.

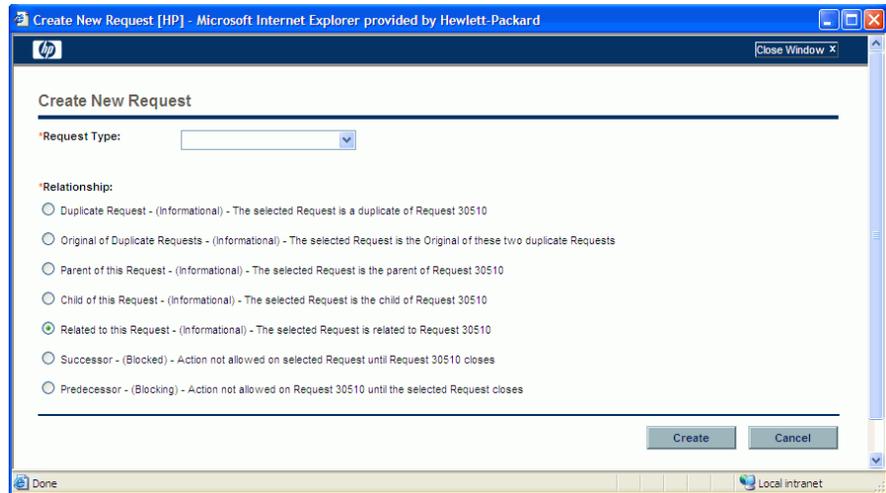
3. To locate a request, enter search criteria, and then click **Search**.
4. In the **Request Search Results** section, in the **Req #** column, click a number to open the corresponding request.

The detail page for the request opens.

5. Scroll to, and then expand, the **References** section.
6. From the **New Reference** list, select **Request (New)**.

7. Click **Add**.

The Create New Request page opens.



8. From the **Request Type** list, select the type of request you want to create.

9. Under **Relationship**, select the option that indicates how the new request is related to the request you opened.



For more information about establishing relationships between requests, see [Overview of Adding References to Requests on page 31](#).

10. Click **Create**.

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

11. In the fields marked with a red asterisk, provide all required information.

12. Provide any additional information about the request that might be useful.



For instructions on how to complete the Create New *<Request Type>* page, see [Creating Requests from the Menu Bar on page 20](#).

13. Click **Submit**.

Creating Requests by Copying Requests

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



If your PPM Center instance supports multiple languages, and you create a request by copying an existing field, keep in mind that the new request you create as a result of the copy action has its definition language automatically set to your current session language, even if the original entity had a different definition language. For more information, see the *Multilingual User Interface Guide*.

To copy an existing request:

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



To open a request, see [Opening and Updating Requests on page 72](#)

The detail page for the request opens.

3. Above the **Header** section, click **Make a Copy**.

The Copy Request page opens.

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

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

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

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



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

Assigning Resources to Requests

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

Assigning Resources from the Summary Section of the Request Detail Page

To assign an individual resource from the **Summary** section of the request detail page:

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

A search and select window opens.

2. Do one of the following:

- Scroll through the listed resources, and select the resource to assign.

Alternatively, to restrict the number of resources listed:

- a. Enter search preferences in any combination of the **Assigned To**, **Department**, **First Name**, and **Last Name** fields.
- b. Click **Find**.
- c. From the list of resources returned, select a resource name.

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



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

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

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

Field	Description
Only show results with a Suitability Score greater than	Specify a number that represents the suitability of the resource for the request, based on role, skills, and availability. The higher the score, the better suited the resource is for assignment to the request. For more information about suitability score, see the <i>HP Resource Management User's Guide</i> .
Resource Name	Use this auto-complete to select multiple resources by name.
Role	Use this auto-complete to select one or more roles that the resources must assume.
Resource Pool	Use this auto-complete to specify a resource pool to assign to the request.
Organization Unit	Use this auto-complete to select an organization unit to which the resources must belong.

Field	Description
Resource Category	Use this auto-complete to select
Location	From this list, select the site where the resource must be located.
Department	From this list, select the department to which the resource must belong.

5. Click **Search**.

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

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

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

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

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



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

Allocating Resources from the Resources Section of the Request Detail Page

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

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

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

A search and select window opens.

3. Do one of the following:

- Scroll through the listed resources, and select the resource to assign.

Alternatively, to restrict the number of resources listed:

- a. Enter search preferences in any combination of the **Assigned To**, **Department**, **First Name**, and **Last Name** fields.
- b. Click **Find**.
- c. From the list of resources returned, select a resource name.

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

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

Overview of Adding References to Requests

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

You can associate the following reference types with a request:

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

For some references, such as packages and other requests, you can establish a functional dependency to the original request. For example, you can specify that a request is a predecessor to the package so that the package cannot continue along its workflow until the request is closed. For a list of the references and their possible dependency relationships, see [Request Detail Page, References Section](#) on page 58.

Adding References to Requests

This section provides the steps you perform to add different types of references to a request.

Adding Attachments as References

To add an attachment as a reference to a request:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Attachment**.
5. Click **Add**.

The Add Document window opens.

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



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

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

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

10. Click **Save**.



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

Adding Existing Packages as References

You can reference existing packages to a request.

To reference an existing package:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Package (Existing)**.
5. Click **Add**.

The Add Reference: Package window opens.

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

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

8. Under **Select which relationship the selected packages will have to Request # <request number>**, click the option that describes the relationship between the request and the package.

The screenshot shows the 'Add Reference: Package' window. At the top, there is a title bar with the HP logo and a 'Close Window' button. Below the title bar, the text 'Add Reference: Package' is displayed. A section titled '*Select which relationship the selected Packages will have to Request #30256:' contains four radio button options: 'Child of this Request - (Informational) - The selected Package is the child of Request 30256', 'Related to this Request - (Informational) - The selected Package is related to Request 30256' (which is selected), 'Predecessor - (Blocking) - Action not allowed on Request 30256 until selected Package closes', and 'Successor - (Blocked) - Action not allowed on selected Package until Request 30256 closes'. Below this is a 'Package Search Results' section with a table showing 5 results. The table has columns for 'Pkg #', 'Workflow', 'Status', 'Priority', 'Assigned To', 'Pkg Lines', and 'Description'. At the bottom of the window, there are buttons for 'Add', 'Modify Search', and 'Cancel', along with 'Check All' and 'Clear All' links and a 'Showing 1 - 5 of 5' indicator.

Pkg #	Workflow	Status	Priority	Assigned To	Pkg Lines	Description
<input type="checkbox"/> 30032	DEV > TEST > PROD	New	Normal	csayer		Patch v3 migration test
<input type="checkbox"/> 30029	DEV > TEST > PROD	New	Normal	hhaywood		Upgrade for release 7.0b
<input type="checkbox"/> 30019	DEV > TEST > PROD	New	Normal	csayer		Patch v4a migration test
<input type="checkbox"/> 30008	DEV > TEST > PROD	New	Normal	csayer	1	
<input type="checkbox"/> 30007	DEV > TEST > PROD	In Progress	Normal	csayer	4	Patch v3 migration test

9. In the **Package Search Results** section, select the checkbox(es) next to the name(s) of the package(s) to add.

10. Click **Add**.

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

11. Click **Save**.

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



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

Adding New Packages as References

You can create a new package to add as a request reference.

To reference a new package:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Package (New)**.
5. Click **Add**.

The Create New Package window opens.

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

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

New Package 30034

Save Cancel

Header

Package No.: 30034 Package Group: Created By: Admin User

Description: This initiative addresses Phase 2 of the overhaul. Created On: March 6, 2007

Workflow: Status: New

Assigned User: Carolyn Sayer Priority: Normal Parent:

Assigned Group: ITG Deployment Managemen Package Type: Customization Priority Seq: 50

Percent Complete: 0

Notes

Notes to be added on save:

References

Reference Additions

New Reference: Attachment Add

References to be added on Save:

Open Remove

Save Cancel

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

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

9. Click **Save**.



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

Adding Programs as References

You can reference existing programs to a request.

To reference an existing program:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Program**.
5. Click **Add**.

The Reference Program window opens.

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

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

9. Click **Save**.



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

Adding Projects as References

To attach existing projects as a reference:

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

The Add Reference: Project window opens.

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

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

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

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

10. Click **Save**.



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

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

Adding Releases as References

You can add existing releases as references to requests.

To reference an existing release:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Release**.
5. Click **Add**.

The Reference Release window opens.

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

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

9. Click **Save**.



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

Adding Existing Requests as References

You can add existing requests as references to requests.

To reference an existing request:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Request (Existing)**.
5. Click **Add**.

The Add Reference: Request window opens.

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

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

7. Under **Select which relationship the selected Requests will have to Request # <request number>**, select the option that describes how the request you are about to select is related to the open request.
8. In the **Request Search Results** section, select the checkbox(es) for the request(s) you want to add.
9. Click **Add**.

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

10. Click **Save**.



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

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

Adding New Requests as References

You can add new requests as references to an existing request.

To reference a new request:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Request (New)**.
5. Click **Add**.

The Create New Request window opens.

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

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

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

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

11. Click **Save**.

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

Adding Tasks as References

You can add tasks as references to requests.

To reference an existing task:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **Task**.
5. Click **Add**.

The Add Reference: Task window opens.

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

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



“Related to this Task” is the only relationship that can exist between requests and tasks.

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

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

10. Click **Save**.

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

Adding URLs as References

You can reference an existing URL to a request.

To reference an existing URL:

1. Log on to PPM Center.
2. Open or create a request.
3. Scroll to, and then expand, the **References** section.
4. From the **New Reference** list, select **URL**.
5. Click **Add**.

The Reference URL window opens.

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

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

10. Click **Save**.

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

3 Viewing Requests

Overview of HP Demand Management Requests

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

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

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

Figure 3-1. Request Help icon



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

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

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

- **Details.** The **Details** section displays information specific to the request, such as a description of the problem, the business area affected, and what is required to resolve the request. As you create a request, you must usually complete some fields in the **Details** section. After you submit the request, you can update information in any active fields. The **Details** section is available immediately after the request is created.
- **Notes.** Use the **Notes** section to add notes and to view any existing notes already submitted on the request. You can add notes when you create a request or later, after you submit it. The **Notes** section is available immediately after you create a request.
- **Status.** The **Status** section displays request status and is available after you create and submit a request.
- **References.** You use the **References** section to display or add additional information about the request. For example, you can add a document or URL as a reference to a request. The **References** section is available immediately after you create a request.

Figure 3-2. Request detail page

Dashboard ▾ Open ▾ Search ▾ Create ▾ My Links ▾ History ▾ ☆ Search menus or entities...

Create New DEM - Application Enhancement > Dashboard - NS - DM Portlets > Search Requests > Search Results > Request #31923

[Printable Version](#) ◀ Result 1 of 1 ▶

DEM - Application Enhancement - #31923

Description:
 Request Status: New ([View Full Status Below](#))

Available Actions

Initial Review

[Resolution Pr...](#) [Assign](#) [More Info Req...](#) [Schedule](#) [Reject](#)

[Make a Copy](#) [Delete](#)

[Expand All](#) [Collapse All](#) [Save](#)

Header

Summary

Request No.: 31923 Requested By: Admin User
 Request Type: DEM - Application Enhancement [Change](#) Created On: August 25, 2009
 Workflow: DEM - Enhancement Request Process Request Status: New
 Assigned To:
 Assigned Group:
 Requestor Department: ▾
 *Priority: ▾ Application:
 *Description:

Details

- Enhancement Details
- Analysis
- Demand Management SLA Fields
- Demand Management Scheduling Fields

Notes No Notes Exist

Status

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Initial Review (View Available Actions)		August 25, 2009 12:29:25 PM PDT
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design			
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (immediate success)			
19	Close (immediate failure)			

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

References

[Make a Copy](#) [Delete](#)

[Save](#)

Opening a Request

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

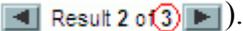
To open a request:

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

The Search Requests page opens.

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

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

4. To sort the listed requests by request number, click the **Req #** column heading.
5. In the **Req #** column, click the number for the request to open.
6. To view the next request in your search results, click the right-pointing arrow in the upper right corner of the page ().
7. To view the previous request in your search results, click the left-pointing arrow in the upper right corner of the page ().

Request Details Page, Top Section

The top of the detail page for a request displays the request number, the request type, and the **Available Actions** section. The top section is visible after a request is created and submitted. The title of the request detail page is *<Request Type>* - *<Request Number>* (for example, DEM - Application Bug - #30182).

DEM - Application Enhancement - #30905

Description: Add new purchasing codes

Request Status: Pending Functional Spec ([View Full Status Below](#))

Available Actions

High Level Design

Complete Not Completed More Info Required

Make a Copy Delete

Expand All Collapse All Save

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

- Perform an available action
- Print the request details
- Save the request
- Make a copy of the request
- Delete the request
- Expand or collapse all sections on the page
- Jump to the **Status** and **Notes** sections

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

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

asterisk. (If you cannot provide all of the information immediately, click **Save** on the look-ahead page to save the information you have provided so far.)

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

Request Detail Page, Header Section

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

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

Figure 3-3. Request detail page, Header section, Summary subsection

Header			
Summary			
Request No.:	32172	Requested By:	Admin User
Request Type:	DEM - Application Enhancement Change	Created On:	April 1, 2009 02:04:43 PM MDT
		Request Status:	Pending Functional Spec
Workflow:	DEM - Enhancement Request Process		
*Assigned To:	<input type="text" value="Ayako Yoshida"/>		
Assigned Group:	<input type="text"/>		
Requestor Department:	<input type="text" value="Sales & Mktg"/>		
Priority:	<input type="text" value="High"/>	Application:	<input type="text" value="Supply Chain Management"/>
Description:	Add purchasing codes for KMM subsidiary		
Work Item Fields			
Scheduled Start Date:	<input type="text" value="September 1, 2009 12:00:00 AM"/>	Actual Start Date:	<input type="text"/>
Scheduled Finish Date:	<input type="text" value="September 30, 2009 12:00:00 AM"/>	Actual Finish Date:	<input type="text"/>
Scheduled Duration:	<input type="text" value="21"/>	Actual Duration:	<input type="text"/>
Scheduled Effort:	<input type="text" value="168"/>	Actual Effort:	<input type="text"/>
Workload?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Workload Category:	<input type="text"/>
Role:	<input type="text" value="System Administrator"/>		

Request Detail Page, Details Section

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

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

Figure 3-4. Request detail page, Details section

The screenshot shows a web interface for a request detail page. At the top, there is a tab labeled "Details" and a sub-tab labeled "Enhancement Details". Below this, the form contains the following fields:

- Enhancement Name:** A text input field containing "Add purchasing codes for KMM subsidiary".
- Detailed Description:** A text area containing "Add purchasing codes for KMM subsidiary".
- New Enhancement:** Radio buttons for "Yes" (selected) and "No".
- Suite:** A dropdown menu with "PUR" selected.
- Requested By:** A date and time field showing "September 30, 2009 12:00:00 AM" with a calendar icon.
- Requestor Location:** A dropdown menu with "US Central" selected.
- Business Initiative:** A dropdown menu with "Integrated Supply Chain" selected.

Below the form, there are three expandable sections:

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

Request Detail Page, Notes Section

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

Figure 3-5 shows a typical **Notes** section. All **Notes** sections include the **Add Note** section. The **Existing Notes** section is displayed after the first note is added and the request is saved.

Figure 3-5. Request detail page, Notes section

Notes

Add Notes

Notes to be added on save:

Existing Notes

Show Only User Notes Note Author: ALL Changed Field: ALL

Admin User (admin)	New
February 7, 2008 10:29:18 AM PST	The horizontal scrollbar appears to be broken in some browser. Testing is in progress.

Request Detail Page, Resources Section

If your PPM Center administrator has enabled resource tracking for the request type, the request detail page displays the **Resources** section under the **Details** section. The **Resource** column in this section lists the resources assigned to the request so far. The section may also include **Scheduled Effort**, **Actual Effort**, **Actual Start**, and **Actual Finish** columns (see *Figure 3-6*).

Figure 3-6. Request detail page, Resources section

Resources (1 Resource[s] Exist)

Resource	Scheduled Effort (hrs)	Actual Effort (hrs)	Actual Start	Actual Finish
<input checked="" type="checkbox"/> Eliot Packer	10.00	0.00		
Overall:	10.00	0.00		

Add Resource

Notes

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

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

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



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

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

If, in addition to being configured to track resources, the request also includes the **Work Item Fields** section, then some of these work item fields become roll-ups of the resource-level information. So, for example, the information in the **Scheduled Effort** column in the **Work Item Fields** section is a sum of the scheduled effort specified for each resource on the request. The **Actual Effort**, **Actual Start Date**, and **Actual Finish Date** fields also become rollups.

Request Detail Page, Status Section

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

If you have the permissions required to act on the active workflow step, a **View Available Actions** link is displayed in the **Step Status** column (*Figure 3-7*). Click the link to access the workflow step's available actions. Note that the available actions are also shown in the **Available Actions** section of the title section (see *Request Details Page, Top Section on page 47*).

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

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

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

Figure 3-7. Request detail page, Status section

Status				
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Assign	Admin User	April 1, 2009 02:17:49 PM MDT
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design	High Level Design (View Available Actions)		April 1, 2009 02:17:50 PM MDT
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (immediate success)			
19	Close (immediate failure)			

Request Detail Page, Graphical View

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

To see the graphical workflow for a request.

1. From the standard interface, open a request.

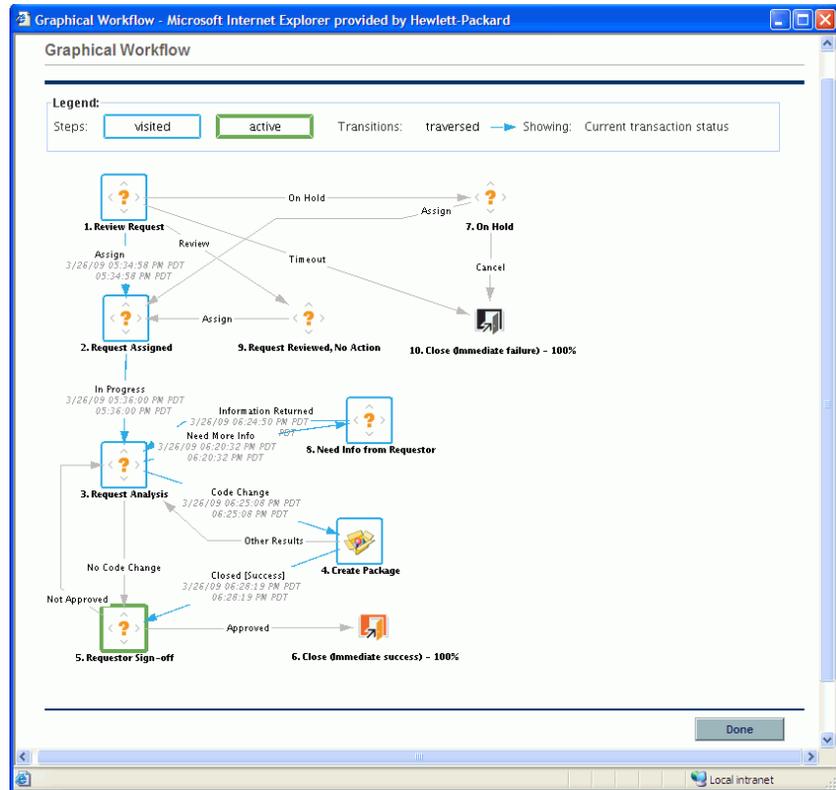


For information about how to open requests, see [Opening a Request on page 46](#).

2. On the detail page, scroll to, and then expand the **Status** section.

3. At the bottom of the **Status** section, click the **Graphical View** link.

The Graphical Workflow window opens.



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

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

Request Detail Page, Approval Details

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

To view the approval details for a request:

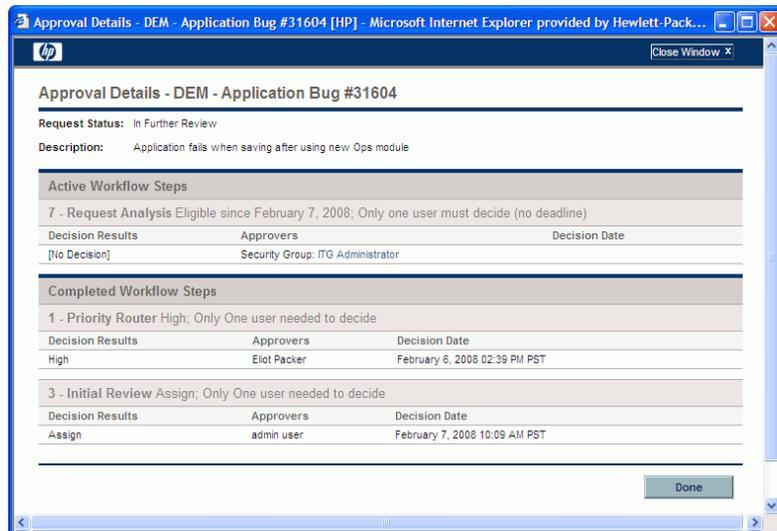
1. From the standard interface, open a request.



For information about how to open requests, see [Opening a Request](#) on page 46.

2. On the detail page, scroll to, and then expand the **Status** section.
3. At the bottom of the **Status** section, click **Approval Details**.

The Approval Details window opens.



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

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

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

Request Detail Page, Transaction Details

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

To view the transaction details for a request:

1. From the standard interface, open a request.



For information about how to open requests, see [Opening a Request on page 46](#).

2. On the detail page, scroll to, and then expand the **Status** section.
3. At the bottom of the **Status** section, click **Transaction Details**.

The Transaction Details window opens.

Date	Username	Step	Workflow Step Name	Step Status	Results	Error	Error Message	Notes
February 6, 2008 02:39 PM PST	epacker	3	Initial Review	Eligible				
February 7, 2008 10:09 AM PST	admin	3	Initial Review	Complete	Assign			
February 7, 2008 10:09 AM PST	admin	7	Request Analysis	Eligible				

Request Detail Page, Request Execution Log

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

To view the request execution log for a workflow step:

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



For information about how to open requests, see [Opening a Request on page 46](#).

2. On the detail page, scroll to, and then expand the **Status** section.
3. In the **Step Status** column for an execution step, click **log**.
4. The Request Execution Log page opens and displays the details of the request execution.

Request Detail Page, References Section

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

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

In some cases, you can create a functional dependency between a request and the referenced entity. For example, you can specify that a package is a predecessor to the request. This means the request cannot continue to the next workflow step until the package is closed. For a list of the references, their definitions, and possible dependency relationships, see [Table 3-1 on page 59](#).

Figure 3-8. References section of the request detail page

Table 3-1. References and relationships (page 1 of 4)

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

Table 3-1. References and relationships (page 2 of 4)

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

Table 3-1. References and relationships (page 3 of 4)

Reference	Reference Description	Possible Relationships	Relationship Description
Requests (Existing)	Reference an existing request.	Duplicate request	(Informational) The referenced request is a duplicate of the request.
		Original duplicate requests	(Informational) The referenced request is the original of the two duplicate requests.
		Parent of this request	(Informational) The referenced request is the parent of the request.
		Child of this request	(Informational) The referenced request is the child of the request.
		Related to this request	(Informational) Referenced request is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this request closes.

Table 3-1. References and relationships (page 4 of 4)

Reference	Reference Description	Possible Relationships	Relationship Description
Requests (New)	<p>You can create new requests from an existing request.</p> <p>Also, if configured as part of the workflow, you can spawn a request from a request. A reference to that request is automatically generated, establishing a two-way link between the requests.</p>	Duplicate request	(Informational) The referenced request is a duplicate of the request.
		Original duplicate requests	(Informational) The referenced request is the original of the two duplicate requests.
		Parent of this request	(Informational) The referenced request is the parent of the request.
		Child of this request	(Informational) The referenced request is the child of the request.
		Related to this request	(Informational) Referenced request is related to this request.
		Predecessor	(Blocking) Action not allowed on this request until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this request closes.
Tasks	Reference a task in HP Project Management.	Related to this request	(Informational) The referenced task is related to this request.
URL	Reference a Web address. Documents at the URL must be in MIME format.	Standard URL interaction	(Informational) The URL is related to this request.

Predecessor Relationships

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

Successor Relationships

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

Finish/Finish Predecessor Relationships

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

4 Processing and Managing Requests

Overview of Processing and Managing Requests

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

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

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

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

You can configure request types to send email notifications after:

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

Searching Requests

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

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

Conducting Basic Request Searches

To conduct a basic request search based on the request number:

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

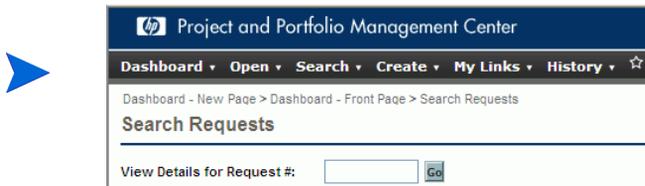
To search for and list all requests:

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

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

1. Log on to PPM Center.
2. On the **Search** menu, click **Requests**.
The Search Requests page opens.
3. In the **Search for Requests to View** section, provide values in one or more of the enabled fields.
4. In the **Choose Columns** section:
 - a. From the **Available Columns** list, select the columns to display in the search results.
 - b. Use the right-pointing arrow to move the selected column headings to the **Selected Columns** list.
 - c. Use the right-pointing and left-pointing arrows to prearrange the order of the columns in the search results.
5. To save these search preferences:
 - a. In the **Save this search as** field, type a name for the search.
 - b. Click **Save**.
6. Click **Search**.

As you navigate pages, PPM Center tracks the pages you have viewed and displays links to these pages above the menu bar.



To return to a previous page, click the corresponding link.

Conducting Advanced Request Searches

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

To conduct an advanced request search:

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

The Search Requests page opens.

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

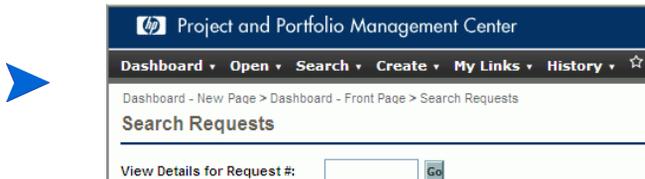
The **Advanced** button is now enabled.

4. Click **Advanced**.

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

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

As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard.



To return to a previous page such as the Search Results page, click the corresponding link at the top of the page.

Using the Query Builder to Search Requests

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

Request Query Components

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

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

where

`<FieldName>` represents a field on a request.

`<ComparisonOperator>` represents one of the operators listed in [Table 4-1](#).

`<Value(s)>` represents one or more values that the field can accept.

Comparison Operators for Building Request Queries

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

Table 4-1. Supported operators for building queries

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

Logical Operators for Building Request Queries

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

You can:

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

```
Priority='High' AND Status='InProgress' AND NOT AssignedTo  
IN {'johndoe','janedoe'}
```

Grouping Search Terms in Queries

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

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

Using the Request Browser to Search Requests

To browse requests:

1. On the **Open** menu, click **Demand Management > Request Browser > Browse Requests**.

The Browse Requests page opens.

2. In the **Request Type** field, enter the request type(s) of the requests you are searching for.



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

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



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

4. In the **Choose Columns for Request List** section, select the available columns to include in the request pages you browse.

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



You must select at least one field.

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

Opening and Updating Requests

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

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

The following sections address these tasks.

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



Opening Requests from Portlets

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

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

For information about HP Demand Management portlets, see *Managing Requests Using Portlets* on page 100 and *Portlets on the Demand Manager Page* on page 111.

Opening Requests from Email Notifications

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

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

➤ For information about taking action on request workflow steps using the Mobility Access feature, see *Mobility Access For Decision Workflow Step Notifications*.

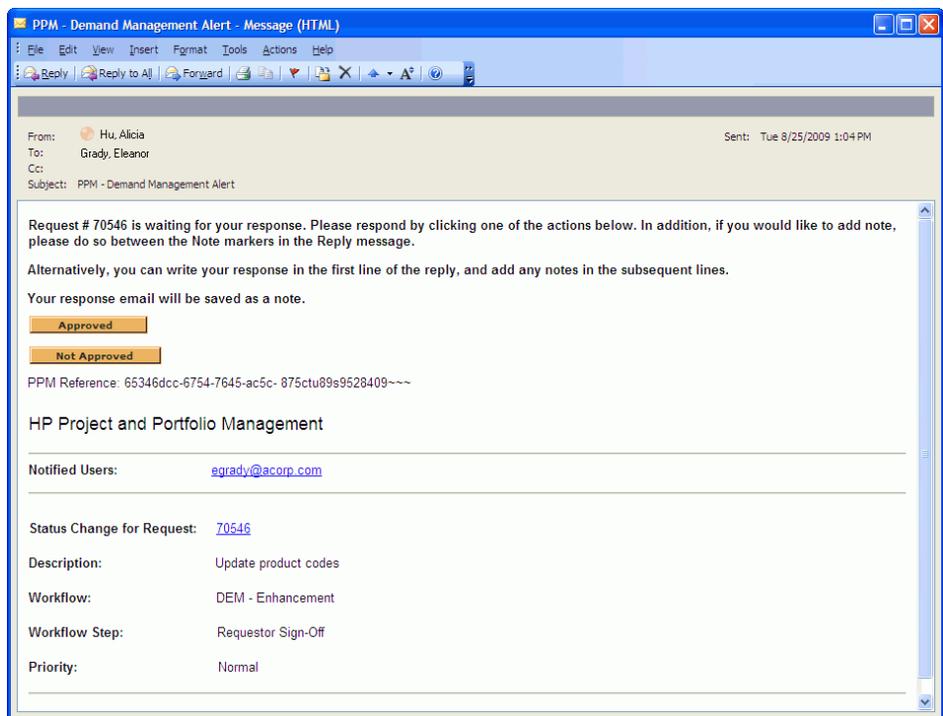
Mobility Access For Decision Workflow Step Notifications

If the Mobility Access Service is enabled on your PPM Center instance, your PPM Center administrator may have enabled the “decision by email” feature for some of the email notifications associated with decision workflow steps. If you are assigned as someone who must approve of such a workflow step on a request, then you can act on the workflow step from your email inbox or from a handheld device, without have to log on to PPM Center. This facilitates the processing of requests quickly along their assigned workflows.

Acting on a Workflow Step from Your Email Inbox

If the workflow assigned to a request includes a decision step that requires an action such as approval, an administrator can configure a notification for that step that allows user action by email. When the request reaches the workflow decision step, PPM Center sends a message that looks something like the one shown in *Figure 4-1* to the specified recipients.

Figure 4-1. HTML notification with email approval configured



Notifications with email approval enabled may be formatted as plain text, HTML (as shown in *Figure 4-1*), or both.

HTML-formatted notifications include buttons for the actions now available on the workflow step. With one exception (**Delegate**), the available action buttons displayed are the same as those displayed on the request detail page for the request. Because Mobility Access does not support the delegation feature, HTML notifications do not contain the **Delegate** action button for Approve All workflow decision steps.



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

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

If you receive an HTML notification with email approval configured, to act on the request, do the following:

1. Click an action button. This automatically generates a response email.



The Subject line of the generated response email is configured to include the action that you select. Do NOT modify the generated response email apart from adding notes, as described in the following step.

2. (Optional) To add notes to the request, type them between the `<Notes Begin>` and `<Notes End>` markers in the generated response email.



To ensure that the Mobility Access Server can process your response correctly, make sure that you include the original notification message in your reply.

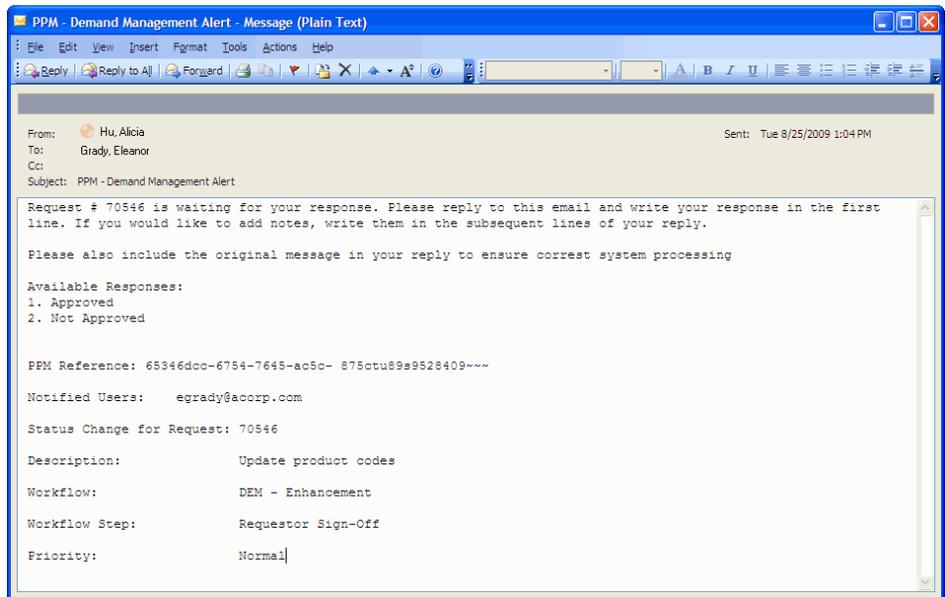
3. Send the reply.



If you are specified as a recipient of an action request notification for a particular request workflow step, but you are not listed on the security for the step, you receive the email notification with available actions. However, when you send a response, the Mobility Access Service returns a FAILURE feedback message indicating that you do not have permission to act on the workflow step.

Figure 4-2 shows a workflow decision step notification (with email approval configured) formatted as plain text.

Figure 4-2. Plain text notification with email approval configured



If you receive a plain text notification (with email approval configured), to act on the request, do the following:

1. Reply to the notification email. (For example, in Microsoft Outlook, click **Reply**.)
2. In the first line of the reply, type your response. (Available responses are listed in the notification message.)
3. (Optional) If you want to add notes to the request, type them in the subsequent lines.



To ensure that the Mobility Access Server can process your response correctly, make sure that you include the original notification message in your reply.

4. Send the reply.

(Windows Systems) Mobility Access in a Multilingual User Interface Context

If your PPM Center system supports multiple languages and Mobility Access, keep in mind that the notification locale must match the Windows regional settings on the your system. If the notification locale is different than your locale, the message display is corrupted, and you cannot send a response.

You can configure your locale using the regional and language options settings on Control Panel. For example, for a Windows Server 2003-based computer, on Control Panel, select **Regional and Language Options**. In the Regional and Language Options window, click the **Advanced** tab, and then, in the **Language for non-Unicode programs** section, select a language from the list.

Responding to Notifications from a Handheld Device

In addition to responding to request notifications from your email inbox, you can respond from a handheld device. Some handheld devices do not allow you to edit the content of the mail you receive when you reply. In this case, if the message is in plain text format, you must enter your response as plain text in the first line of the email. If your handheld device supports HTML rendering, you can use the HTML buttons to open the reply screen with automatically-generated text.

For handheld devices, you can indicate an action using either a sequence number or a transition name. A transition name can include partial values and case-insensitive values. For example, to indicate approval, you can type any of the following values:

- 1 (If “1” represents Approved)
- App
- Appr
- APPROVE

To append a note to the request, type it into the second line of the email.

Because of software limitations, notifications that use HTML or multipart (both HTML and plain text) templates are not correctly displayed on some mobile phones. In these cases, the phones send notifications as email

attachments in which the HTML content is correctly displayed. You can click action buttons in an attachment to send your response.



Some handheld devices have a setting that determines whether the received notification message is included in the reply. To ensure that the Mobility Access Service can process your response correctly, make sure that you configure this setting to enable the inclusion of the original message in your responses.

Mobility Access Response Processing

After you act on a request by email, the Mobility Access Server changes the status of the request based on the action you selected and appends any notes you added to the request. If configured to do so, the Mobility Access Server may send a follow-up message to notify you of the results of your action. An action result can be SUCCESS, FAILURE, or ACTION NOT APPLICABLE. You can enable or disable system feedback individually for each type of action result.



In cases where the Mobility Access Service receives two email responses to the same workflow step, the service performs the action specified in the first response it receives, but does not perform the action specified in the second response. Instead, the Mobility Access Service sends the second recipient a feedback notification, which indicates that an action was already performed on the request.

Opening Requests from the Menu Bar

To open a request from the menu bar:

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

The detail page for the request opens.

Performing a Basic Request Edit

To perform a basic request edit.



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

1. Open a request to edit.

The **Available Actions** section contains buttons for the actions that you have permission to perform.

2. To act on the request, in the **Available Actions** section, click a button.

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

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



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

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

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

3. In the **Header** section, complete the fields, as required.

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

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

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



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

4. In the **Details** section, complete the fields, as required.

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

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

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

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

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

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

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

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

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

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

If the workflow step is a decision workflow step, and you have the permission required to act on an eligible step, the **Step Status** column displays the **View Available Actions** link. To display the action page for a workflow step, click **View Available Actions**.

The actions available on the action page are the same as those displayed in the title section for the request. To move the request to the next workflow step, complete the action.

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

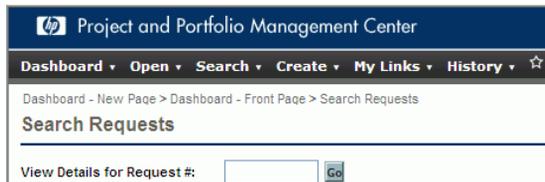
You can view existing references in subsections of the **References** section. Existing references are grouped by entity type. For example, referenced requests are listed in the **Requests** section.

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

In some cases, you might want to reference a Web-accessible file or a document or file from a local machine to the request. You can also add other entities such as packages, tasks, or other requests as request references. For information about how to add references, see [Adding References to Requests](#) on page 32.

8. Click **Save**.

As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard.



To return to a previous page, click the corresponding link at the top of the page.

Editing Requests Simultaneously

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



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

Example: Two Users Editing Fields

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

- Otumbo makes changes to the **Assigned To** and **Department** fields, and adds text to the **Notes** field.
- Monette makes changes to the **Assigned To** and **Company** fields, and adds text to the **Notes** field.

1. Otumbo clicks **Save** first.

All of his changes are saved.

2. Monette clicks **Save** next.

Monette's **Notes** are saved, but a message at the top of the request informs her that another user has made changes to the request, and displays these changes. Monette must re-enter her changes to the **Assigned To** and **Company** fields.

3. Monette again changes values in the **Assigned To** and **Company** fields, and then clicks **Save**.

The changes are saved.

Example: Two Users Editing Fields Plus Workflow Action

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

1. Otumbo adds to the request **Notes** section, and then clicks the workflow action button.

Otumbo’s changes are saved and the request advances along its workflow.

2. Monette adds an attachment to the request, and then clicks the workflow action button.

The attachment to the request is saved, but a message at the top of the request informs Monette that the workflow action she attempted has already been performed. No further action is necessary.

Example: Parallel Workflow Steps

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

Quick Edits: Editing Multiple Requests at the Same Time

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

Performing quick edits is convenient if, for example:

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

Considerations for Performing Quick Edits

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

- You can only perform a quick edit on requests that are all of the same type. So, when you search requests, select only one request type if you plan to do a quick edit.
- You cannot perform quick edits on requests of the PFM - Project type.
- Advanced UI rules that have been set up for requests do not work during quick edits. For example, any UI rules defined to dynamically show or hide a field, change the field styling, or make a field required, are not applied while a user performs a quick edit. However, upon saving the requests, any fields that would have been dynamically required based on other edits made by the user are enforced.
- You can update standard request fields (such as text fields, date fields, and lists), but you cannot edit complex components such as attachments, table

components, and entity-chooser components (for example, staffing profiles) during a quick edit.

- You cannot perform quick edits to take workflow actions or to update aspects of a request other than basic field values. For instance, you cannot add notes, interact with references, or manage resources during a quick edit.
- If your PPM Center instance supports multiple languages, note that you can only edit request types in the language in which they are defined. If you cannot edit a request type because it was defined in a language different from your current session language, log out of PPM Center and then log on again, this time selecting the request type's definition language as your session language. For more information, see the *Multilingual User Interface Guide*.

Quick Edits: Error Handling

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

Errors can occur if:

- A request was updated by a different user in another session before you saved your changes.
- A UI rule to make an empty field required was triggered on save (see *Considerations for Performing Quick Edits* on page 85).

Performing Quick Edits

To perform a quick edit on a set of requests:

1. Search for a set of requests of the same type that you want to update.

The Request Search Results page opens and lists your search results.

Project and Portfolio Management Center SIGN OUT

Search Requests > Search Results

Export to Excel Modify Search

Save this search as: Save Manage Saved Searches

Request Search Results Showing 1 - 14 of 14

Req #	Description	Status	Created By	Priority	Workflow	Creation Date
<input type="checkbox"/> 30511	Inventory doesn't match transaction details	New	Admin User	Normal	DEM - Bug Request Workflow	February 22, 2008
<input type="checkbox"/> 30510	Loan details unavailable in IE.	New	Admin User	High	DEM - Bug Request Workflow	February 22, 2008
<input type="checkbox"/> 30481	CSM app throwing exceptions on save	New	Admin User	Normal	DEM - Bug Request Workflow	February 6, 2008
<input type="checkbox"/> 30480	Application missing module for new Ops division	New	Admin User	High	DEM - Bug Request Workflow	February 6, 2008
<input type="checkbox"/> 30452	request 1	In Further Review	Admin User	Normal	DEM - Bug Request Workflow	July 6, 2007
<input type="checkbox"/> 30254	Cannot access Euro email groups	New	Admin User	Low	DEM - Bug Request Workflow	October 11, 2006
<input type="checkbox"/> 30253	inventory counts do not transaction details	In Further Review	Admin User	Normal	DEM - Bug Request Workflow	October 10, 2008

Check All Clear All Edit Delete Showing 1 - 14 of 14

Export to Excel Modify Search

2. Select the checkboxes for the requests on which you want to perform a quick update.
3. Below the list of requests, click **Edit**, and then select **Quick Edit**.

Project and Portfolio Management Center SIGN OUT

Request #30481 > Search Requests > Search Results > Request Quick Edit > Request Quick Edit

Modify Requests

Req #	Description	Status	Created By	Priority	Workflow	Creation Date
30480	Application missing module for new Ops division	New	Admin User	High	DEM - Bug Request Workflow	Feb 6, 2008
30481	CSM app throwing exceptions on save	New	Admin User	Normal	DEM - Bug Request Workflow	Feb 6, 2008
30510	Loan details unavailable in IE.	New	Admin User	High	DEM - Bug Request Workflow	Feb 22, 2008
30511	Inventory doesn't match transaction details	New	Admin User	Normal	DEM - Bug Request Workflow	Feb 22, 2008

Save Done Cancel

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

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

The fields you are authorized to edit become enabled.

Req #	Description	Status	Created By	Priority	Workflow	Creation Date
30480	Application missing module for new Ops division	New	Admin User	High	DEM - Bug Request Workflow	Feb 6, 2008
30481	CSM app throwing exceptions on save	New	Admin User	Normal	DEM - Bug Request Workflow	Feb 6, 2008
30510	Loan details unavailable in E.	New	Admin User	High	DEM - Bug Request Workflow	Feb 22, 2008
30511	Inventory doesn't match transaction details	New	Admin User	Normal	DEM - Bug Request Workflow	Feb 22, 2008

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

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

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



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

As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard.



HP Project and Portfolio Management Center

Dashboard ▾ Open ▾ Search ▾ Create ▾ My Links ▾ History ▾ ☆

Dashboard - New Page > Dashboard - Front Page > Search Requests

Search Requests

View Details for Request #: Go

To return to a previous page such as the Search Results page, click the corresponding link at the top of the page.

Mass Updates: Acting on Multiple Requests at the Same Time

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

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

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

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

Considerations for Performing Mass Updates

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

- Only one request type is supported for batch update.
- You cannot perform mass updates on requests of the PFM - Project type.
- You can update standard request fields (such as text fields, date fields, and lists), workflow actions, and you can add notes to requests. You cannot perform mass updates on complex components such as attachments, table components, and entity-chooser components (such as staffing profiles).
- Advanced UI rules that have been set up for requests do not work during mass updates. For example, any UI rules defined to dynamically show or hide a field, change the field styling, or make a field required, are not

applied while a user performs a mass update. However, upon saving the requests, any fields that would have been dynamically required based on other edits made by the user are enforced.

- If all of the requests you select to update are active at the same workflow step, you can take action on that step for all of the requests. However, you can update only one active workflow step at a time.

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



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

Mass Updates: Error Handling

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

Errors can occur if:

- A request was updated by a different user in another session before you saved your changes.
- A UI rule to make an empty field required was triggered on save (see *Considerations for Performing Mass Updates on page 89*).

Performing Mass Updates

To use the request mass update feature:

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

The Modify Requests page opens and lists the selected requests.

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

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

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

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

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

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



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

7. Click **Done**.

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

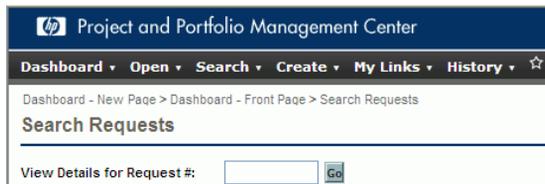
8. To confirm that this is what you want to do, click **Continue**.



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

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

As you navigate pages in the PPM Dashboard, the pages you have viewed are tracked. You can see links to these pages at the top of the PPM Dashboard.



To return to a previous page such as the Search Results page, click the corresponding link at the top of the page.

Managing Requests

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

Reopening Closed Requests

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

To reopen a request:

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



For information about how to open a request, see [Opening and Updating Requests on page 72](#).

The request detail page opens.

3. Scroll to the **Status** section.
4. Click **Reopen Request**.

The request reopens.

Deleting Requests

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

To delete a request:

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



For information about how to open a request, see [Opening and Updating Requests](#) on page 72.

The request detail page opens.

3. Scroll to the bottom of the page.
4. Click **Delete**.

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

5. Click **OK**.

Cancelling Requests

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

To cancel an existing request:

1. Log on to PPM Center.
2. Search for and open the request.
3. On the request detail page, scroll to the **Status** section.
4. Click **Cancel Request**.

HP Demand Management prompts you to confirm the cancellation.

5. Click **OK**.

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

Printing Requests

You can print the detail page for a request.



You cannot modify the printable version of the detail page.

To print a request:

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



For information about how to open a request, see [Opening and Updating Requests on page 72](#).

The request detail page opens.

3. At the top of the page, click **Print Business Case**.

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

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

Purging Requests

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

To purge multiple requests:

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

The search results page opens.

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

Using Demand Management Reports to Monitor Requests

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

Table 4-2. HP Demand Management reports (page 1 of 2)

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

Table 4-2. HP Demand Management reports (page 2 of 2)

Report Name	Description
Request History	Lists the complete workflow and field change history for each selected request. Details include the complete request workflow history and fields configured for auditing with every status change for every step traversed.
Request Quick View	Provides a summary of open and closed requests, organized based on priority.
Request Summary	Displays the total counts for groups of requests matching the selection criteria.
Request Summary (Filter by Custom Fields)	Similar to the Request Summary report except that requests can be filtered based on values in custom fields.
Request Type Detail Report	Displays configuration information for request types, including details about custom fields, possible status values, default logic, and commands used with each request type.

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

Creating an HP Demand Management Report

To create an HP Demand Management report:

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

The Submit New Report page opens.

3. From the **Report Category** list, select **Demand Management**.

The Submit Report: *<Report_Name>* page opens.

4. Provide input in all required fields, and any optional fields you want to use to compose the report.
5. Click **Submit**.

Managing Requests Using Portlets

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

For information about the default portlets displayed on the Demand Manager page, see [Portlets on the Demand Manager Page on page 111](#). For information about how to configure the information displayed in a portlet, see [Setting Portlet Preferences on page 116](#).

Table 4-3. Demand-related portlets (page 1 of 4)

Portlet Name	Description
Assignment Queue	Provides a customizable view of the demand that has not yet been assigned to a resource. Use this portlet to assign a resource to a request.
Consolidated Demand	Displays a bar graph that provides a graphical overview of the demand placed on an organization. Drill-down functionality lets users view details about the requests represented.
Demand by Category	Provides graphical summary view into different aspects of demand. You can organize the information displayed in the portlet based on department, demand type, priority value, and so on. You can also organize the displayed information based on the number of demand entries within a specific grouping (count) or the consolidated effort of the grouped demand.
Demand List	Provides a customizable list of the demand placed on an organization or resource.
Issue List	Lists open issues associated with programs.

Table 4-3. Demand-related portlets (page 2 of 4)

Portlet Name	Description
My Requests	The My Requests portlet displays all requests created by or assigned to the user, and which are at a workflow step that the user can act on. This portlet provides a view of the most pressing requests. By default, the portlet displays all requests (with a current active step) created by or assigned to the user, so that the user can see the information without having to customize the portlet.
Open Requests by Priority	This portlet displays a graphical view of the number of open requests, grouped by assigned priority value. Use this portlet to help you visualize and group open issues.
Program Risk List	This portlet lists risks associated with projects that are linked to programs. You can personalize this portlet to display risks based on project, impact, probability of occurrence, impact level or other criterion. You can configure the portlet to display only the programs that are relevant to your assigned activities.
Program Scope Change List	<p>The Program Scope Change List portlet displays all of the scope change requests associated with projects that are linked to programs. You can configure multiple instances of this portlet for viewing different programs and the scope changes logged against their linked projects.</p> <p>You can personalize the portlet to display scope change requests based on criteria such as project name, severity, change request level, and so on.</p>
Request Activity	This portlet displays general activity information such as the number of requests opened and closed during the previous two weeks, and the number of open requests. This portlet provides visibility into high traffic request types as well as the groups or users assigned to address them.

Table 4-3. Demand-related portlets (page 3 of 4)

Portlet Name	Description
Request List	<p>This portlet displays general request information, including description and status. You can click the Req# link to open the detail page for the corresponding request.</p> <p>If you configure the portlet to display the following columns (for requests such as for request types such as PFM - Asset, PFM - Proposal, PFM - Project, and Project Details), and you have the permissions required, you can click the values in these, which are also links to their corresponding entities in PPM Center:</p> <ul style="list-style-type: none"> • Staffing Profiles • Financial Benefit • Reference Documents <p>The drill-down functionality in this portlet is security-based. If you do not have View, Edit, View All, and Edit All access grants for an entity, its values will not be displayed as links.</p>
Request References	<p>The Request References portlet lists the references attached to request based on filters such as reference type, relationship, and the time period the references were added.</p>
Request Summary	<p>This portlet displays information about groups of requests, including assigned priority, request type, and the total number of requests in each category. You can drill down on any request or request group.</p>
Request Summary Bar Chart	<p>This portlet displays a bar chart that lets you see rolled up information about selected requests. To see the list of requests that a bar represents, click the bar.</p>

Table 4-3. Demand-related portlets (page 4 of 4)

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

HP supplies a preconfigured Demand Manager page that contains request-related default portlets for use by demand managers. For detailed information about the Demand Manager page, and instructions on how to add it to your PPM Dashboard, see [Chapter 6, Demand Manager Page, on page 109](#).

5 Integrating Requests and Projects

Overview of Integrating Requests and Projects

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

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

- **Reference Tasks to Requests.** You can use the **References** tab on the Task Details page to link a task to new and existing requests.
- **Reference Projects from Requests.** You use the can use the **References** tab on the Task Details page to reference existing projects from requests. For information about how to reference a project from a request, see *Overview of Adding References to Requests* on page 31.
- **Reference Tasks from Requests.** You use the can use the **References** tab on the Task Details page to reference existing tasks from requests. For information about how to reference a task from a request, see *Overview of Adding References to Requests* on page 31.

As you integrate requests and projects, dependencies are established between the two entities. For example, you can specify a request as a predecessor to a package. This means that the package cannot continue along its workflow until

the request is closed. *Table 5-1* lists the dependencies that you can create between requests and tasks and requests and projects.

Table 5-1. Dependency relationships

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

For more information about relationships, see *Request Detail Page, References Section* on page 58.

Referencing Requests from Tasks

To reference a request from a task:

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

The Search Projects page opens.

3. Enter your search criteria.
4. Click **Search**.

The Project Search page reloads and displays the search results.

5. To open a project, from the **Project Name** list, click the project name.

6. On the **Project Summary** tab, at the top of the **Work Plan** section, click **Edit Work Plan**.

The View Work Plan page opens to the Schedule View.

7. In the list of tasks, select the task to update, and then click the **Task Details** icon.

The Task Details page opens.

8. Click the **References** tab.

9. From the **New Reference** list, select **Request (Existing)** or **Request (New)**.

10. Click **Add**.

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

11. If you selected **Request (Existing)**, do the following. Otherwise, skip to [step 12 on page 108](#).

- a. On the Add Reference: Request page, enter your search criteria, and then click **Search**.

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

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

- c. Click **Add**.

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

12. If you selected **Request (New)**, do the following in the Create New Request window:

a. In the **Request Type** field, select the request type.



You can only specify the “Related to this Task” dependency between requests and tasks.

b. Click **Create**.

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

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

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

13. Click **Done**.

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

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

Visibility into Tasks and Requests

You can view references related to your tasks and projects using the Project References portlet on your PPM Dashboard. Add the portlet to your PPM Dashboard, and then personalize it to show the references that are relevant to your activities. You can configure the portlet to display references based on the following:

- Reference types
- Relationship
- Time period during which they were added
- Whether they prevent actions on tasks

6 Demand Manager Page

Overview of the Demand Manager Page

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

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

Figure 6-1. Demand Manager page



Portlets on the Demand Manager Page

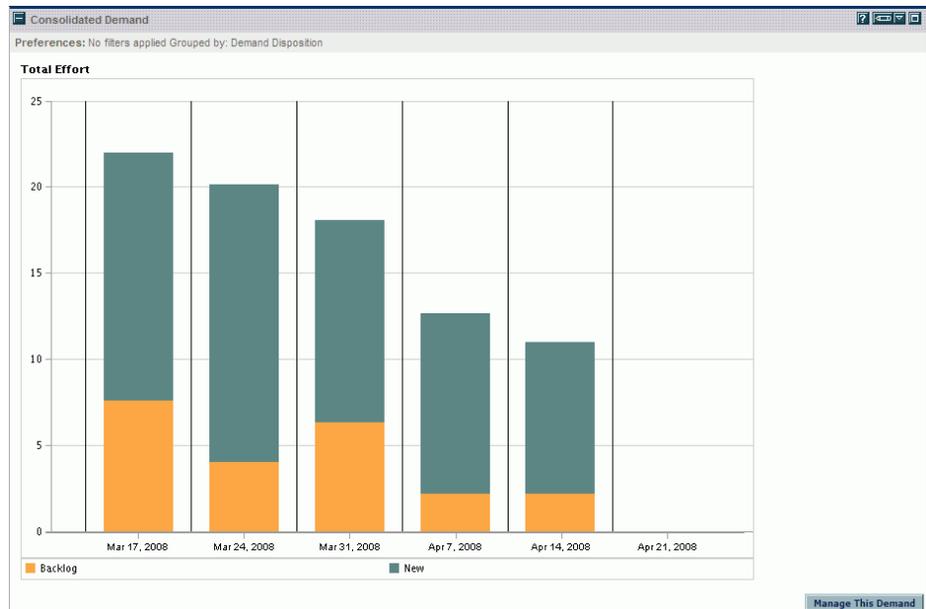
This section provides description of the default portlets displayed on the Demand Manager page. For information about how to personalize these portlets, see *Setting Portlet Preferences* on page 116.

Consolidated Demand Portlet

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

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

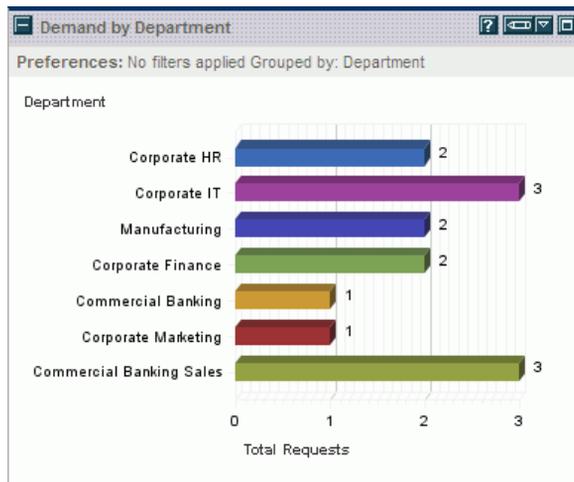
Figure 6-2. Consolidated Demand portlet



Demand by Department Portlet

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

Figure 6-3. Demand by Department portlet



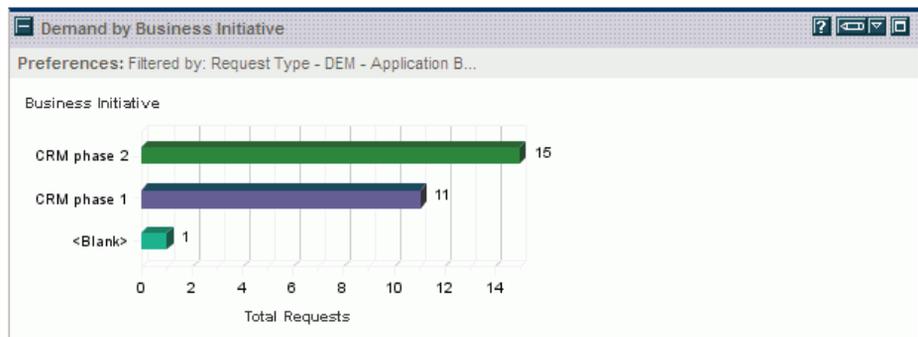
To display descriptions of all the filter fields that you can configure for the Demand by Department portlet, at the top right corner of the portlet, click the **Help** icon .

Demand by Business Initiative Portlet

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

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

Figure 6-4. Demand by Business Initiative portlet



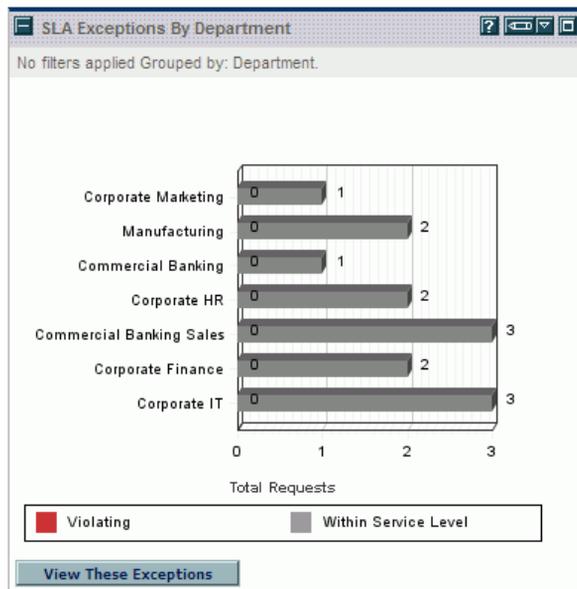
To display descriptions of all the filter fields that you can configure for the Demand by Business Initiative portlet, at the top right corner of the portlet, click the **Help** icon .

SLA Exceptions by Department Portlet

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

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

Figure 6-5. SLA Exceptions by Department portlet



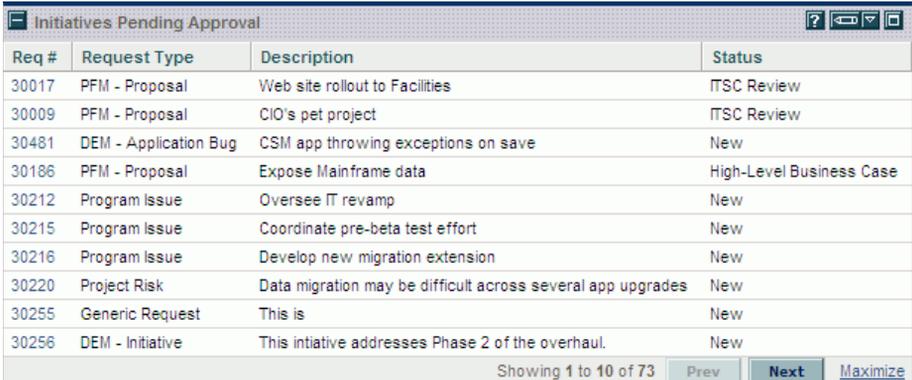
To display descriptions of all the filter fields that you can configure for the SLA Exceptions by Department portlet, at the top right corner of the portlet, click the **Help** icon .

Initiatives Pending Approval Portlet

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

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

Figure 6-6. Initiatives Pending Approval portlet



Req #	Request Type	Description	Status
30017	PFM - Proposal	Web site rollout to Facilities	ITSC Review
30009	PFM - Proposal	CIO's pet project	ITSC Review
30481	DEM - Application Bug	CSM app throwing exceptions on save	New
30186	PFM - Proposal	Expose Mainframe data	High-Level Business Case
30212	Program Issue	Oversee IT revamp	New
30215	Program Issue	Coordinate pre-beta test effort	New
30216	Program Issue	Develop new migration extension	New
30220	Project Risk	Data migration may be difficult across several app upgrades	New
30255	Generic Request	This is	New
30256	DEM - Initiative	This initiative addresses Phase 2 of the overhaul.	New

Showing 1 to 10 of 73 [Prev](#) [Next](#) [Maximize](#)

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

Setting Portlet Preferences

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

To set the preferences for a portlet:

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

The Edit Preferences: *<Portlet Name>* page opens.

4. To change the portlet title displayed on the page:
 - a. At the top of the page, click **Change Title**.
The Edit Portlet Title window opens.
 - b. In the **Title** field, select the current title, and then type a new title.
 - c. To save the title, click **Change**.
5. In the **Preferences** and **Choose Display Columns** sections, make any necessary changes.



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

6. Click **Done**.

The portlet reflects your changes.

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

- *Configuring the Standard Interface*
- *Customizing the Standard Interface*
- *Getting Started*.

Index

A

adding

- existing packages as references to requests, [33](#)
- existing requests as references to requests, [39](#)
- new packages as references to requests, [34](#)
- new requests as references to requests, [40](#)
- programs as references to requests, [36](#)
- projects as references to requests, [37](#)
- references for requests, [31](#)
- releases as references to requests, [38](#)
- tasks as references to requests, [41](#)
- URLs as references to requests, [42](#)

advanced request searches, [68](#)

approval details, [56](#)

assigning

- resources to requests, [27](#)

Assignment Queue portlet, [100](#)

attachments

- adding as references to requests, [32](#)

B

browsing requests, [71](#)

C

cancelling

- requests, [95](#)

chapter overview, [9](#)

comparison operators

- in request queries, [69](#)

Consolidated Demand portlet, [100](#), [111](#)

copying

- requests, [25](#), [47](#)

Create New Request page, [21](#)

creating

- requests, [17](#), [20](#), [23](#)

D

data integrity for requests, [13](#)

definition language

- for entities in the MLU, [14](#)

deleting requests, [47](#), [94](#)

Demand by Business Initiative portlet, [113](#)

Demand by Category portlet, [100](#)

Demand by Department portlet, [112](#)

Demand List portlet, [100](#)

Demand Management

- introduction, [9](#)
- reports, [99](#)
- request overview, [43](#)

Demand Manager page

- overview, [109](#)
- portlet on, [111](#)

- E**
- editing
 - quick edits on multiple requests, **87**
 - simple request edits, **79**
- entities
 - fallback language for, **14**
- error handling
 - during quick edits, **86**
 - mass updates, **90**
- execution log, **58**
- F**
- fallback language, **15**
- G**
- graphical view, **54**
- H**
- handheld devices
 - acting on workflow steps, **77**
- HP Demand Management
 - working with multiple languages, **14**
- I**
- Initiatives Pending Approval portlet, **115**
- Issue List portlet, **100**
- L**
- language fallback, **15**
- logical operators
 - in request queries, **71**
- M**
- managing requests, **93**
 - overview, **65**
 - using portlets, **100**
- mass updates
 - considerations for using, **89**
 - error handling, **90**
 - for requests, **89**
 - of requests, **89**
 - performing on requests, **91**
 - UI rules during, **89**
- menu bar
 - opening requests, **78**
- Mobility Access
 - acting on a workflow steps from a handheld device, **77**
 - acting on a workflow steps through email, **74**
 - for workflow step notifications, **74**
 - in workflow step notifications, **74**
- monitoring requests
 - Demand Management reports, **97**
- My Requests portlet, **101**
- N**
- notifications email
 - opening requests, **73**
- O**
- Open Requests by Priority portlet, **101**
- opening
 - requests, **72**
 - requests from email, **73**
 - requests using menu bar, **78**
 - requests using portlets, **73**
- P**
- packages
 - adding as references to requests, **33, 34**
 - adding to requests, **33, 34**
- portletlets
 - Assignment Queue, **100**
 - changing the title, **116**
 - Consolidated Demand, **100, 111**
 - Demand by Business Initiative, **113**
 - Demand by Category, **100**
 - Demand by Department, **112**

- Demand List, [100](#)
- demand-related, [100](#)
- Initiatives Pending Approval, [115](#)
- Issue List, [100](#)
- managing requests, [100](#)
- on the Demand Manager page, [111](#)
- Open Requests by Priority, [101](#)
- opening requests, [73](#)
- Program Risk List, [101](#)
- Program Scope Change List, [101](#)
- Request Activity, [101](#)
- Request List, [102](#)
- Request References, [102](#)
- Request Summary, [102](#)
- Request Summary Bar Chart, [102](#)
- Request Summary Pie Chart, [103](#)
- setting preferences, [116](#)
- SLA Exception Roll Up, [103](#)
- SLA Exceptions by Department, [114](#)
- portlets My Requests, [101](#)
- PPM Dashboard
 - setting portlet preferences, [116](#)
- preconfigured Dashboard pages
 - Demand Manager page, [111](#)
- preferences
 - for portlets on a PPM Dashboard page, [116](#)
- printing
 - requests, [47](#), [96](#)
- Program Risk List portlet, [101](#)
- Program Scope Change List portlet, [101](#)
- programs
 - adding requests as references, [36](#)
 - adding to requests, [36](#)
- projects
 - adding to requests, [37](#)
 - adding to requests as references, [37](#)
 - integrating requests, [105](#)
- purging
 - requests, [96](#)

Q

- query builder
 - comparison operators used, [69](#)
 - logical operators used, [71](#)
 - using, [69](#)
- quick edits
 - described, [85](#)
 - error handling during, [86](#)
 - how to perform, [87](#)

R

- references
 - adding for requests, [31](#)
 - finish-finish predecessor relationships, [63](#)
 - predecessor relationships, [63](#)
 - request relationships, [59](#)
 - successor relationships, [63](#)
- related documents, [16](#)
- releases
 - adding to requests, [38](#)
- reopening requests, [93](#)
- reports
 - Demand Management, [99](#)
 - for monitoring requests, [97](#)
- Request Activity portlet, [101](#)
- Request Browser
 - using to search requests, [71](#)
- request detail page
 - approval details, [56](#)
 - details section, [50](#)
 - graphical view, [54](#)
 - header section, [49](#)
 - notes section, [51](#)
 - references section, [58](#)
 - request execution log, [58](#)
 - Resources section, [51](#)
 - status section, [53](#)
 - title section, [47](#)
 - transaction history, [57](#)
- Request List portlet, [102](#)

- Request References portlet, [102](#)
- Request Summary Bar Chart portlet, [102](#)
- Request Summary Pie Chart portlet, [103](#)
- Request Summary portlet, [102](#)
- request types, [12](#)
 - selecting, [20](#)
- requests, [39](#)
 - adding existing packages, [33](#)
 - adding new packages, [34](#)
 - adding programs, [36](#)
 - adding projects, [37](#)
 - adding references, [31](#)
 - adding releases, [38](#)
 - adding tasks, [41](#)
 - adding to requests, [39](#), [40](#)
 - adding URLs, [42](#)
 - advanced searches, [68](#)
 - approval details, [56](#)
 - assigning resources to, [27](#)
 - basic searches, [66](#)
 - cancelling, [95](#)
 - copying, [25](#), [47](#)
 - Create New Request page, [21](#)
 - creating, [17](#), [20](#), [23](#)
 - definition, [12](#)
 - deleting, [47](#), [94](#)
 - execution log, [58](#)
 - finish-finish predecessor relationships, [63](#)
 - graphical view, [54](#)
 - integration projects, [105](#)
 - managing, [93](#)
 - managing overview, [65](#)
 - managing using portlets, [100](#)
 - mass updates, [89](#)
 - mass updates of, [89](#)
 - opening, [72](#)
 - opening from notifications, [73](#)
 - opening using menu bar, [78](#)
 - opening using portlets, [73](#)
 - performing mass updates, [91](#)
 - predecessor relationships, [63](#)
 - printing, [96](#)
 - printing request detail page, [47](#)
 - processing and data integrity, [13](#)
 - purging, [96](#)
 - query builder searches, [69](#)
 - reference relationships, [59](#)
 - referencing from tasks, [106](#)
 - reopening closed requests, [93](#)
 - request detail page overview, [44](#)
 - request type definition, [12](#)
 - searching, [65](#), [66](#)
 - simple edits, [79](#)
 - simultaneous edits of multiple requests, [83](#)
 - statuses definition, [12](#)
 - successor relationships, [63](#)
 - transaction history, [57](#)
 - types, [12](#)
 - updating, [72](#)
 - using reports to monitor, [97](#)
 - using Search Browser to search, [71](#)
 - viewing tasks, [108](#)
- resources
 - assigning to requests, [27](#)
- Resources section
 - request detail page, [51](#)
- S**
- search terms
 - grouping in queries, [71](#)
- searching
 - advanced searches for requests, [68](#)
 - comparison operators used in request queries, [69](#)
 - for requests, [65](#)
 - logical operators used in request queries, [71](#)
 - requests, [66](#)
 - requests (advanced), [68](#)
 - requests using Request Browser, [71](#)
 - requests using the query builder, [69](#)
- SLA Exception Roll Up portlet, [103](#)
- SLA Exceptions by Department portlet, [114](#)
- status
 - request, [12](#)

T

tasks

- adding to requests, [41](#)
- referenced from requests, [106](#)
- viewing requests, [108](#)

transaction history, [57](#)

U

UI rules

- during mass updates, [89](#)

updating

- multiple requests simultaneously, [89](#)
- requests, [72](#)

URLs

- adding to requests, [42](#)

W

workflow step notifications

- Mobility Access, [74](#)
- Mobility Access for, [74](#)

workflows

- definition, [12](#)
- workflow step definition, [12](#)

