HP Project and Portfolio Management Center

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Tracking and Managing IT Demand User's Guide

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1 Getting Started with Tracking and Managing IT Demand

Introduction to Tracking and Managing IT Demand

HP Demand Management is an HP Project and Portfolio Management Center (PPM Center) product that provides a single application and repository to capture all IT demand placed on an IT organization. PPM Center consolidates information from many different sources to enable you to both view aggregate demand in real time and report against it. Standard demand categories allow IT organizations to normalize the demand from different sources. This helps to assign resources and distribute coverage of IT demand.

HP IT Demand Management Solution

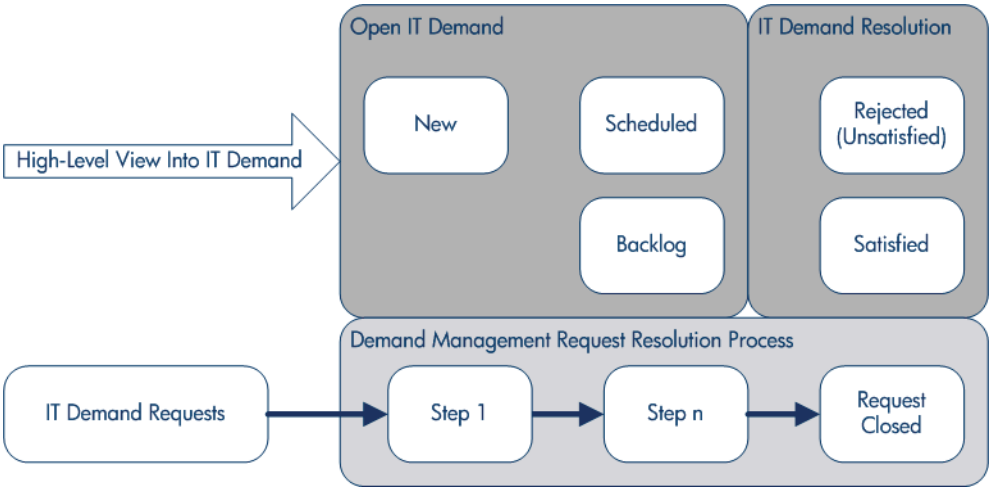
IT groups receive requests for help from many different sources. Some requests are tracked by help desks, defect tracking systems, or service request systems. Other requests are logged in spreadsheets, notes, emails, and voice mailboxes. When requests for help come from a variety of sources, managing those requests can become a challenge. As a result, IT resources can become oversubscribed and IT activities can become misaligned with business requirements.

HP Demand Management provides a single point of contact for all requests placed on an IT group. HP Demand Management consolidates requests from many different sources, so that IT managers and others responsible for managing and tracking IT requests for help can view the demands placed on an IT group in real time.

The HP IT Demand Management solution uses the existing HP Demand Management functionality (see *Figure 1-1*). HP Demand Management provides standard IT demand categories that allow IT groups to normalize the various requests for help. HP Demand Management also provides the tools required to track, analyze, schedule, and resolve requests. These tools include menus, pages, PPM Dashboard pages, and portlets. Demand on an IT group can be analyzed, managed, assigned to users, scheduled, and rejected.

For more information about HP Demand Management tools, see Chapter 2, *Interface Options for Managing Demand* on page 15. For more information about HP Demand Management tools, see Chapter 3, *Processing IT Demand* on page 35.

Figure 1-1. IT Demand Management Process



HP Demand Management Terms and Concepts

The following sections define terms and concepts associated with HP Demand Management:

- *Demand Disposition* on page 9
- *Demand Fields and Demand Sets* on page 9
- *IT Demand Request Types* on page 11
- *Predefined IT Demand Request Types and Workflows* on page 11
- *IT Demand Request Type Definitions* on page 12
- *SLAs* on page 12
- *HP IT Demand Management Solution Requests* on page 12

Demand Disposition

Demand disposition refers to the current status of IT demand expressed as the status of requests. Generally, the status of requests is one of the following:

- New
- Scheduled
- Backlog

Demand Fields and Demand Sets

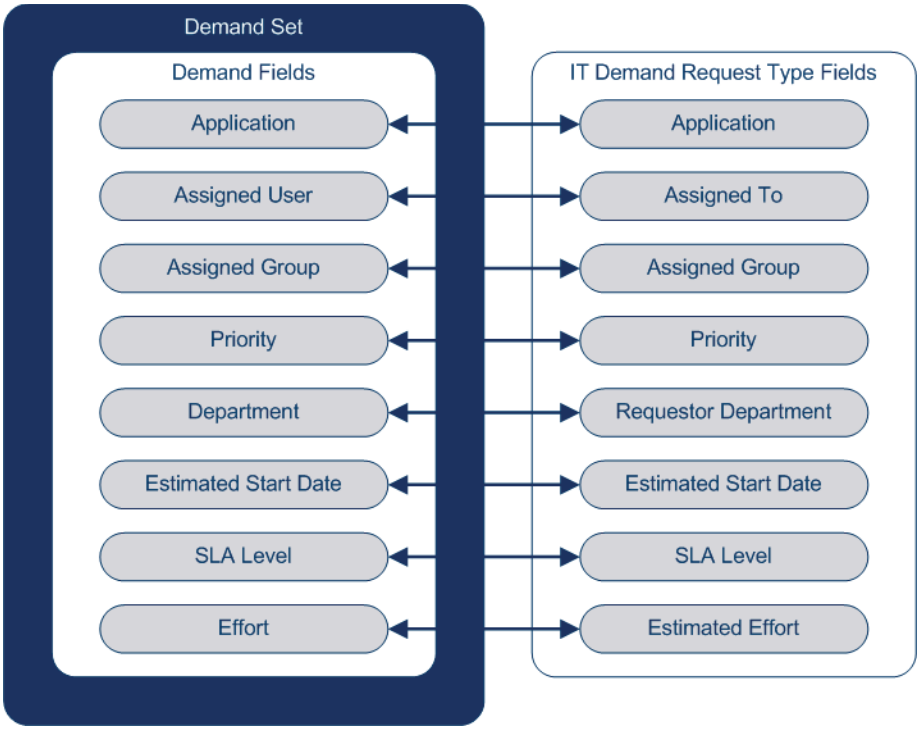
Different groups within a company might need to track different sets of IT demand. For example, the R&D department might need to track the IT demand from product defect and enhancement requests. The IS department might need to track IT demand from help desk requests. To enable this categorization and separation of IT demand, the HP IT Demand Management solution includes the concept of demand sets.

Demand sets are self-contained configurations for the HP IT Demand Management solution. Demand sets allow multiple groups within an organization to track and manage IT demand in a way that best suits their

business requirements. In essence, demand sets are groups of demand fields. Each demand set group corresponds to a set of IT demand request types. Each demand field corresponds to a field on each of the IT demand request types (see *Figure 1-2*).

Demand sets are a way to normalize the common fields in each of the IT demand request types. In addition to providing a consistent, normalized set of IT demand, demand fields also provide an easy way to visualize and track IT demand by request type.

Figure 1-2. Demand set field and IT demand request type field mapping



IT Demand Request Types

The HP IT Demand Management solution is designed to be integrated with existing HP Demand Management request resolution systems. The HP IT Demand Management solution offers a specific kind of request, called an IT demand request. IT demand requests are designed specifically for information technology groups. For example, a common request of IT groups is for a database refresh. The HP IT Demand Management solution provides an HP-supplied IT demand request specifically for database refreshes (DEM - Database Refresh). When you create a new IT demand request type, that new type of IT Demand can be tracked and managed.

Predefined IT Demand Request Types and Workflows

The HP IT Demand Management solution includes four predefined IT demand request types. Each predefined IT demand request type corresponds to a predefined IT demand workflow. *Table 1-1* lists the IT demand request types, their definitions, and the associated IT demand workflows.

Table 1-1. IT demand request types and workflows

IT Demand Request Type	Definition	IT Demand Workflow
DEM - Application Bug	Used to report problems in current IT applications.	DEM - Bug Request Workflow
DEM - Application Enhancement	Used to request new functionality in current IT applications.	DEM - Enhancement Request Process
DEM - Database Refresh	Database refresh requests can be made for all IT operations applications in the testing phase. Standard IT operation service levels apply.	DEM - Database Refresh
DEM - Initiative	Used to request key projects for future quarters, contingent upon management approval from key stakeholders.	DEM - Project Initiative Process

IT Demand Request Type Definitions

IT demand request type definitions control much of the request-specific logic of the tracking and managing process. Definitions control the following items and processes:

- Defaulting to a specific workflow to use when processing an IT demand request
- Custom field definitions and behaviors
- Layout
- Data access and security (who can view or edit the IT demand request)
- Configuration security (who can alter the IT demand request type)
- Notifications

SLAs

The HP IT Demand Management solution tracks and reports on service level agreements (SLAs). These SLAs correspond to an acceptable level of performance or reaction time for items being managed using HP Demand Management.

HP IT Demand Management Solution Requests

The HP IT Demand Management solution is designed to be integrated with existing HP Demand Management request resolution systems. In a typical request resolution system, when a person has a requirement that person creates a request. When the HP IT Demand Management solution is in place, requests will additionally include scheduling and SLA fields to increase the effectiveness of the requests. Request management includes activities such as the printing, canceling, reopening, deleting, and purging of requests.

For information on how to create and manage requests, see the *HP Demand Management User's Guide*.

Related Information

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

- *Tracking and Managing IT Demand Configuration Guide*
- *HP Demand Management User's Guide*
- *HP Demand Management Configuration Guide*

2 Interface Options for Managing Demand

Menus for Managing IT Demand

The HP IT Demand Management solution provides menus to manage your IT demand. Using these menus requires the correct access grants and security group permissions. If you do not have the menus described in the following section as part of your menu bar, see your application administrator.

In the standard interface menu bar, the HP IT Demand Management solution adds the **Open > Demand Management** menu as well as the **Demand Sets & Processes** submenu of the **Open > Administration** menu. From these menus, you can:

- View IT demand
- Manage IT demand
- Schedule IT demand
- Analyze IT demand
- Run Demand Management reports
- Administer the IT demand process

Table 2-1 defines the demand-related components of the **Open > Demand Management** menu and the **Open > Administration > Demand Sets & Processes** menu.

These menu items might vary slightly depending on the onsite configuration during installation of the HP IT Demand Management solution.

Menu items in the **Open > Administration** menu group should be used only by advanced users and application administrators.

Table 2-1. Default HP Demand Management and Administration menus (page 1 of 3)

Menu Group	Menu Item	Description
Demand Management	Search Requests	Searches for requests using filter criteria you specify and controls which fields are displayed (in columns) for the search results. Allows you to save search criteria with a name you specify.
	Manage Consolidated Demand	Analyzes the IT demand placed on your organization. You can also click the graph to schedule or reject a portion of the IT demand. For more information, see *Manage Consolidated Demand Page* on page 19.
	Schedule Demand	Schedules when the IT demand will be fulfilled. You can also select to reject the IT demand. For more information, see *Schedule Demand Page* on page 21.
	Analyze Demand by Category	Analyzes the current IT demand using a set of filters and display parameters. For more information, see *Analyze Demand by Category Page* on page 22.
	Create Requests	Creates a new request. For more information, see the *HP Demand Management User's Guide*.

Table 2-1. Default HP Demand Management and Administration menus (page 2 of 3)

Menu Group	Menu Item	Description
Demand Management > Demand Reports	Demand Creation History	Submits the Demand Creation History report.
	Satisfied Demand History	Submits the Satisfied Demand History report.
	Historical SLA Violations	Submits the Historical SLA Violations report.
Demand Management > Saved Searches	Manage Saved Searches	Manages previously saved searches (see menu item Search Requests). Allows you to specify category names and organize saved searches under those categories. Adds to the **Saved Searches** menu the names of your saved searches, organized under categories as you specified.
Demand Management > Request Browser	Browse Requests	Searches for requests using filter criteria you specify, controls which fields are displayed (in columns) for the search results, and configures the Request Browser Tree groupings. Allows you to save the preference set with a name you specify.
Demand Management > Request Browser > Saved Preference Sets	<*Preference_Set_Name*>	Displays the specified preference set in the Request Browser Tree. You must save at least one preference set for this menu item to be active.

Table 2-1. Default HP Demand Management and Administration menus (page 3 of 3)

Menu Group	Menu Item	Description
Administration > Demand Sets & Processes	Manage Demand Sets	Configures demand sets. This includes adding request types to your demand sets and mapping demand fields to IT demand request type fields.
	Manage Bug Fix Process	Opens the DEM - Bug Request workflow in the PPM Workbench.
	Manage Enhancement Process	Opens the DEM - Enhancement Request Process workflow in the PPM Workbench.
	Manage Initiative Process	Opens the DEM - Project Initiative Process workflow in the PPM Workbench.

Understanding IT Demand Management Pages

Menu items in the **Open > Administration** menu group should be used only by advanced users and application administrators.

The HP IT Demand Management solution provides specific demand task-oriented pages to manage your IT demand. You can use the **Demand Management** menu to access these task-oriented pages.

Manage Consolidated Demand Page

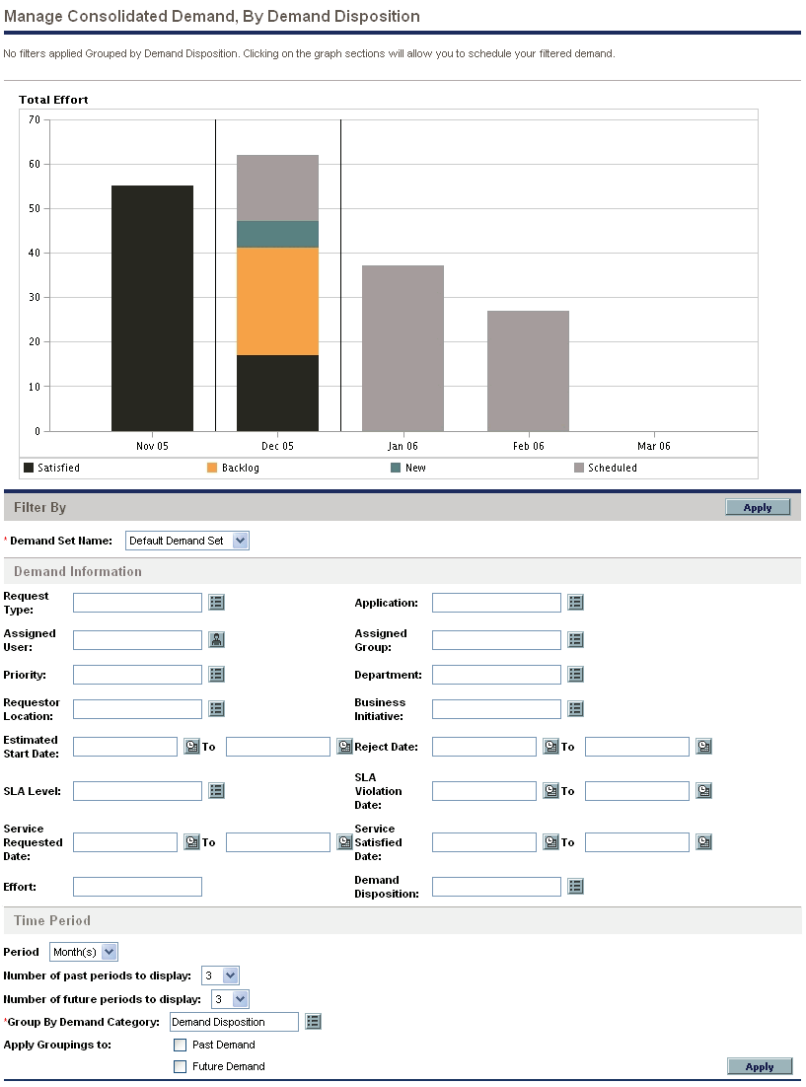
The Manage Consolidated Demand page provides a graphical view of your IT demand by effort (see *Figure 2-1*, where demand is grouped by its disposition). You can click a segment of a bar on the bar chart to schedule that IT demand. You can also use this page to graphically analyze your IT demand by selecting the demand set, desired filters, and a time frame, and then specifying a grouping.

To open this page from the menu bar, select **Open > Demand Management > Manage Consolidated Demand.**

You can configure the Manage Consolidated Demand page to display a range of data related to IT demand. You can use the **Filter By** parameters to display a smaller, more focused set of items. You can specify the **Group By Demand Category** field to organize the display of IT demand, for example by assigned user or by department.

Changes to the Manage Consolidate Demand page are not exported to the Consolidated Demand portlet.

Figure 2-1. Example Manage Consolidated Demand page

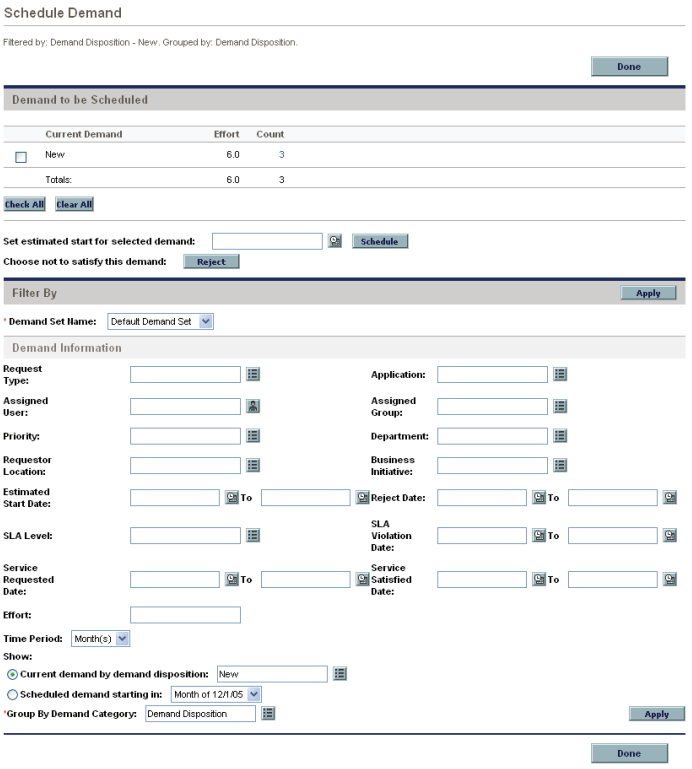


Schedule Demand Page

The Schedule Demand page is used to schedule or reject IT demand. You can access this page by clicking a segment of a bar on the bar chart on the Manage Consolidated Demand page, or by selecting **Open > Demand Management > Schedule Demand** from the menu bar. Enter any desired filter criteria to display a smaller, more focused list. You can also specify the **Group By Demand Category** field, which organizes the list by the selected demand category.

For example, if you click the New segment of the stacked bar for Dec 05 in *Figure 2-1* (see the chart legend), the Schedule Demand page shown in *Figure 2-2* appears and you can schedule that demand.

Figure 2-2. Example Schedule Demand page

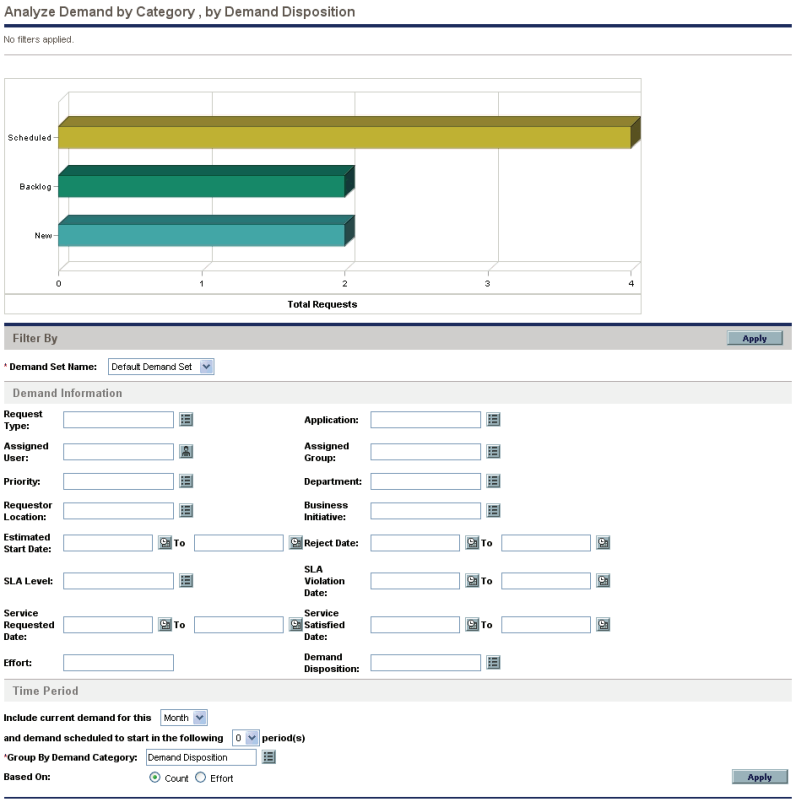


Analyze Demand by Category Page

The Analyze Demand by Category page provides a graphical view of the IT demand in terms of the number of requests. You can access this page by selecting **Open > Demand Management > Analyze Demand by Category** from the menu bar. You can view the IT demand associated with a different demand set by changing the **Demand Set Name** field. Enter any desired filter criteria to display a smaller, more focused, number of items. You can also specify the **Group By Demand Category** field, which organizes the graphical display by the selected demand category, and then click **Apply.**

Figure 2-3 shows an example Analyze Demand by Category page with results grouped by demand disposition.

Figure 2-3. Analyze Demand by Category page



Managing IT Demand with Preconfigured PPM Dashboard Pages

The HP IT Demand Management solution provides preconfigured PPM Dashboard pages to manage your IT demand. These can consist of one or more PPM Dashboard pages, each with a set of configured IT demand portlets. Adding these IT demand PPM Dashboard pages to your PPM Dashboard requires the correct access grants and security group permissions. If you do not have access to the IT demand PPM Dashboard pages, see your application administrator.

Preconfigured Demand Manager PPM Dashboard Page

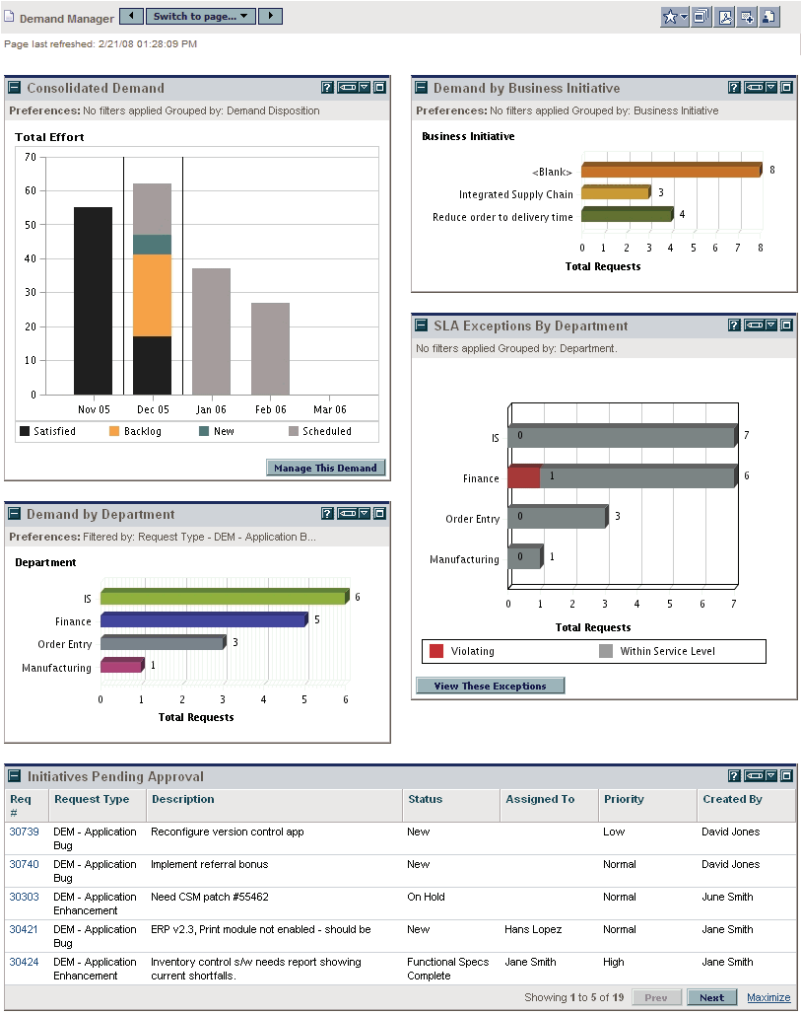
The preconfigured Demand Manager PPM Dashboard page provides an overview of the IT demand placed on an entire organization. IT Demand is displayed in the following portlets (see *Figure 2-4*):

- **Consolidated Demand portlet.** The Consolidated Demand portlet provides a graphical overview of the IT demand placed on your organization. For more information, see *Consolidated Demand Portlet* on page 27.
- **Demand by Department portlet.** The Demand by Department portlet is a personalized version of the Demand by Category portlet. The Demand by Category portlet provides a quick view into different areas of your IT demand, such as organizing the display of IT demand by department. For more information, see *Demand by Category Portlet* on page 30.
- **Demand by Business Initiative portlet.** The Demand by Business Initiative portlet is a personalized version of the Demand by Category portlet. The Demand by Category portlet provides a quick view into different areas of your IT demand, such as organizing the display of IT demand by business initiative. For more information, see *Demand by Category Portlet* on page 30.
- **SLA Exceptions by Department portlet.** The SLA Exceptions by Department portlet is a personalized version of the SLA Exception Roll Up portlet. The SLA Exception Roll Up portlet lists the open IT demand

requests that have triggered SLA exceptions. For more information, see *SLA Exception Roll Up Portlet* on page 32.

- **Initiatives Pending Approval portlet.** The Initiatives Pending Approval portlet is a personalized version of the Request List portlet. The Request List portlet displays general information about IT demand requests, such as their descriptions and statuses. For information about the Request List portlet, see *Demand List and Request List Portlets* on page 28 and the *HP Demand Management User's Guide*.

Figure 2-4. Demand Manager PPM Dashboard page

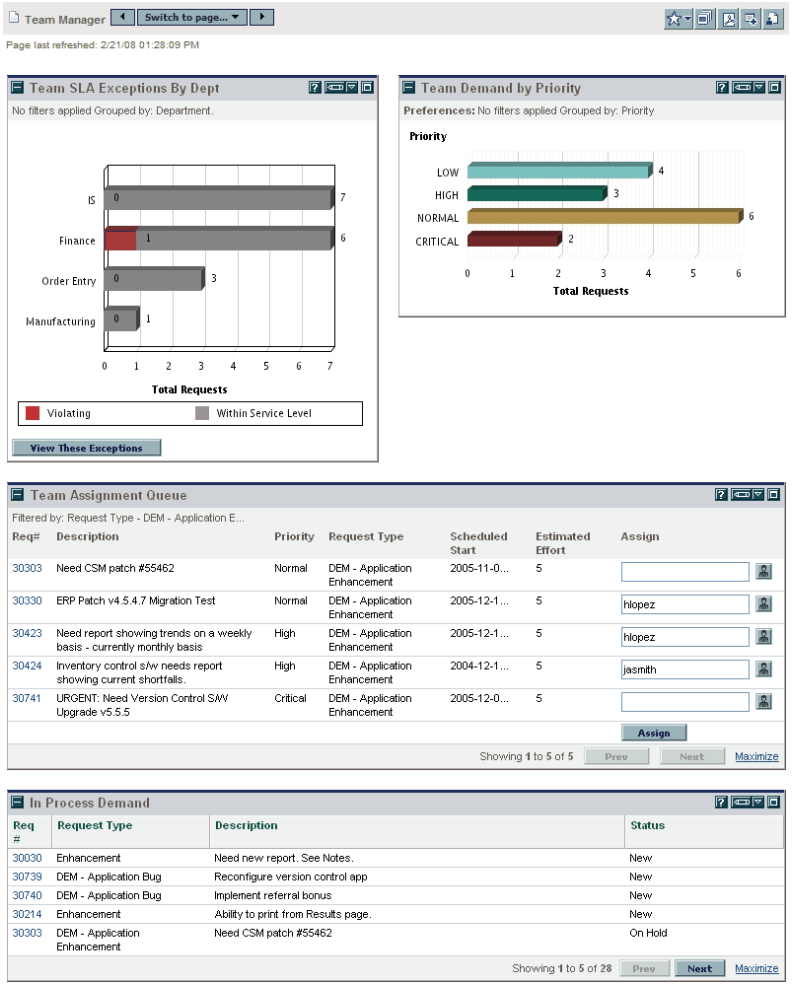


Preconfigured Team Manager PPM Dashboard Page

The preconfigured Team Manager PPM Dashboard page provides a view of IT demand components of interest to those managing IT demand. Team IT demand is displayed in the following portlets (see *Figure 2-5*):

- **Team SLA Exceptions by Dept portlet.** The Team SLA Exceptions by Dept portlet is a personalized version of the SLA Exception Roll Up portlet. The SLA Exception Roll Up portlet lists the open requests that have triggered SLA exceptions. For more information, see *SLA Exception Roll Up Portlet* on page 32.
- **Team Demand by Priority portlet.** The Team Demand by Priority portlet is a personalized version of the Demand by Category portlet. The Demand by Category portlet provides a quick view into different areas of your IT demand, such as organizing the display of IT demand by priority. For more information, see *Demand by Category Portlet* on page 30.
- **Team Assignment Queue portlet.** The Team Assignment Queue portlet is a personalized version of the Assignment Queue portlet. The Assignment Queue portlet provides a personalized view into IT demand that has not been assigned to a resource, as well as assigning a resource to an IT demand. For more information, see *Team Assignment Queue Portlet* on page 30.
- **In Process Demand portlet.** The In Process Demand portlet is a personalized version of the Request List portlet. The Request List portlet displays general information about requests, such as their descriptions and the statuses of the IT demand in the workflow. For information about the Request List portlet, see *Demand List and Request List Portlets* on page 28 and the *HP Demand Management User's Guide*.

Figure 2-5. Team Manager PPM Dashboard page



Portlets for Managing IT Demand

The HP IT Demand Management solution provides portlets to manage your IT demand. These IT demand portlets are included in the Demand Manager and Team Manager PPM Dashboard pages. Each of these portlets displays a table with data related to IT demand. Fields in each portlet's preferences allow you to filter which data is to be included in the displayed table and how it is to be organized (grouped). For example, you can group IT demand data by assigned user or by department.

From the portlet results, you can drill down to the demand's request details by clicking the linked request number in the leftmost column of the portlet listings. For example, if you click request number 30303 in the In Process Demand portlet in *Figure 2-5* on page 26, the request details appear as in *Figure 2-6*.

Adding these IT demand portlets to your PPM Dashboard requires the correct access grants and security group permissions. If you do not have access to the IT demand portlets, see your application administrator.

Consolidated Demand Portlet

The Consolidated Demand portlet on the preconfigured Demand Manager page displays IT demand disposition data in a bar chart format. See *Figure 2-4* on page 24. Resting the cursor over a bar in the bar chart opens a tooltip that lists more precise information about the IT demand data.

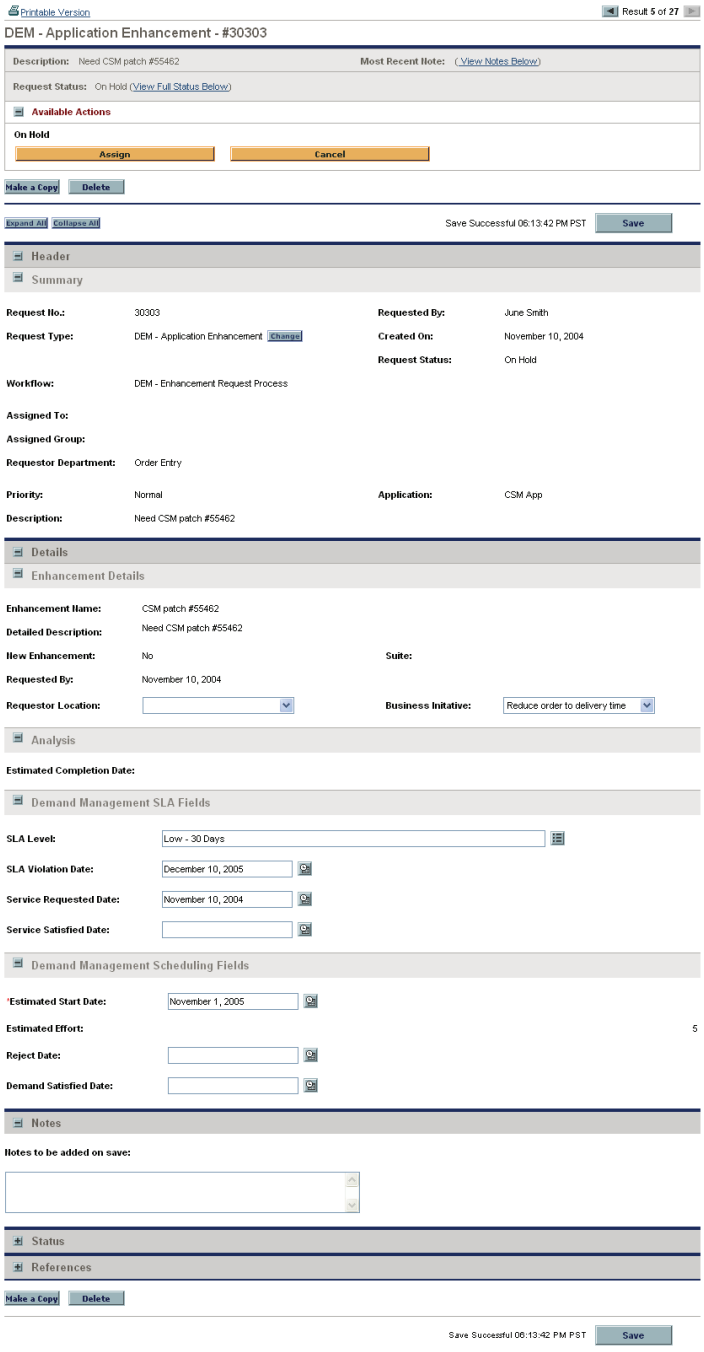
Click **Manage This Demand** to filter which data is to be included in the resulting graphs and to control how the information is organized. For example, you can group IT demand data by assigned user or by department.

Demand List and Request List Portlets

The following portlets are used to view lists of IT demand:

- **Demand List portlet.** The Demand List portlet does not appear on either the preconfigured Demand Manager page or the preconfigured Team Manager page. It must be added individually to a PPM Dashboard page.
- **Request List portlet.** The Request List portlet is personalized as:
  - The Initiatives Pending Approval portlet on the preconfigured Demand Manager page (see *Figure 2-4* on page 24).
  - The In Process Demand portlet on the preconfigured Team Manager page (see *Figure 2-5* on page 26).

Figure 2-6. Viewing a request from the In Process Demand portlet



Demand by Category Portlet

The Demand by Category portlet can appear on the dashboard in the following forms, depending on the requirements of your organization:

- **Demand by Department** portlet and the Demand by Business Initiative portlet on the preconfigured Demand Manager page (see *Figure 2-4* on page 24).
- **Team Demand by Priority** portlet on the preconfigured Team Manager page (see *Figure 2-5* on page 26).

The Demand by Category portlets display IT demand data in a bar chart format. Resting the cursor over a bar in the bar chart opens a tooltip that lists more precise information about the IT demand data.

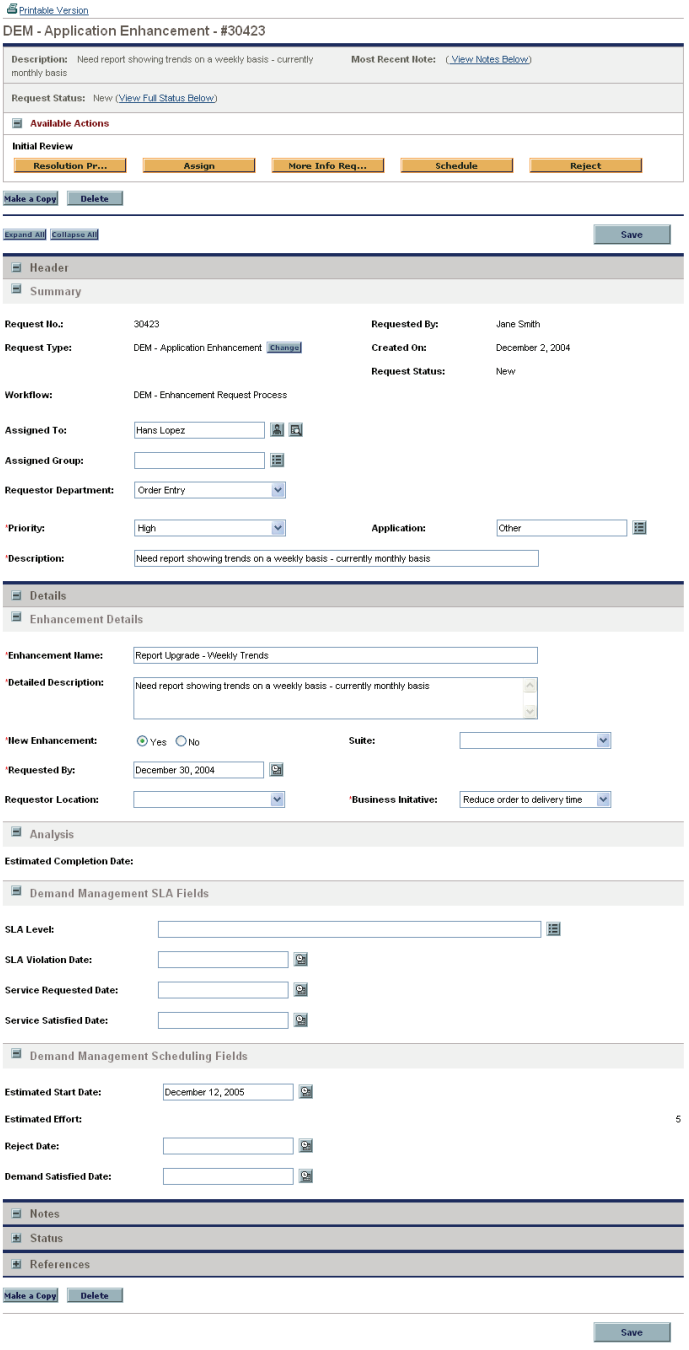
Fields in each portlet's preferences allow you to filter which data is to be included in the displayed charts and how it is to be organized (grouped). For example, you can use the **Group By** field (in the **Time Period** section) to group IT demand data by assigned user, by department, by business initiative, or by other groupings.

Your preferences, including the grouping you select, are listed under the portlet title. If you also want to change the portlet title from Demand by Category to reflect your particular grouping, as is done in the Demand by Category portlets on the preconfigured PPM Dashboard pages shown in *Figure 2-4* on page 24 and *Figure 2-5* on page 26, click Change Title on the Edit Preferences page for the portlet.

Team Assignment Queue Portlet

The Team Assignment Queue portlet displays a table with IT demand data. From this portlet, you can view and assign a user to the IT demand. For more information about assigning users to an IT demand, see *Assigning IT Demand* on page 37.

Figure 2-7. Viewing IT demand from the Team Assignment Queue portlet



SLA Exception Roll Up Portlet

The SLA Exception Roll Up portlet can appear on the dashboard in the following forms, depending on the requirements of your organization:

- **SLA Exceptions By Department** portlet on the preconfigured Demand Manager page (see *Figure 2-4* on page 24).
- **Team SLA Exceptions By Dept** portlet on the preconfigured Team Manager page (see *Figure 2-5* on page 26).

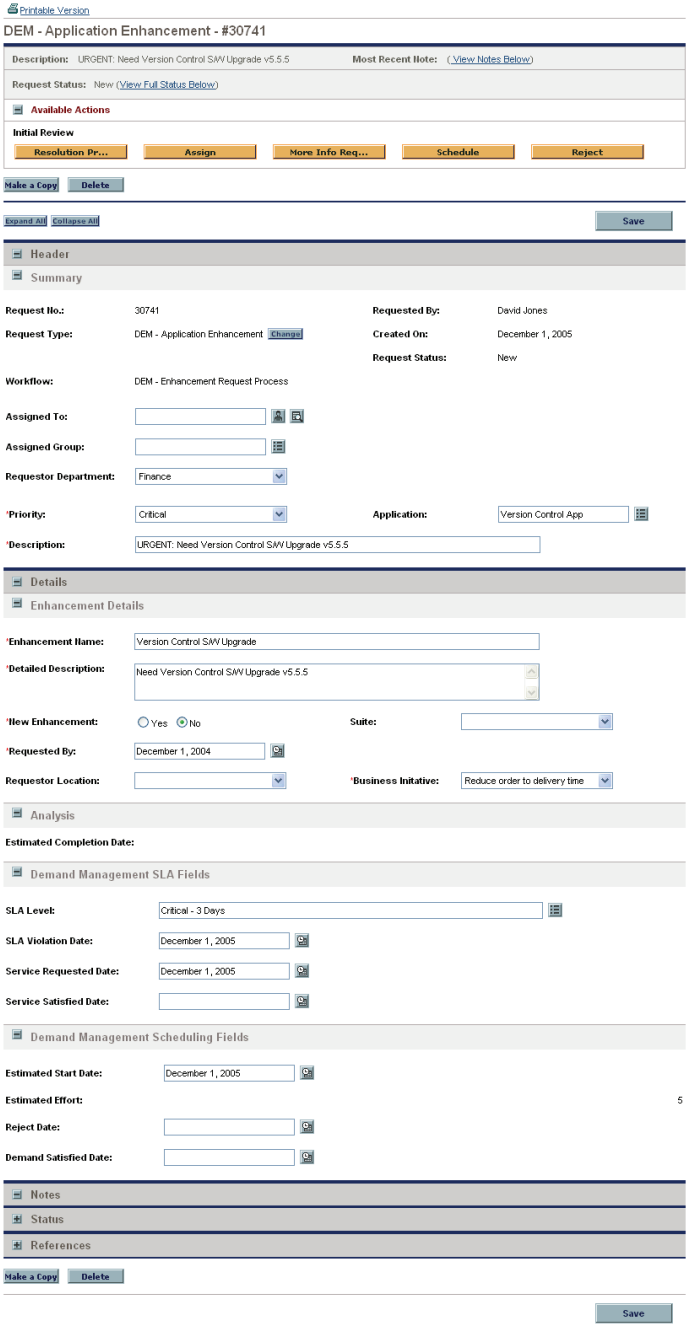
Each of these portlets displays SLA data in a bar chart format. Resting the cursor over a bar in the bar chart opens a tooltip that lists more precise information about the SLA data.

If you click **View These Exceptions** on either portlet, the SLA Exceptions page appears, as shown in *Figure 2-8*.

Figure 2-8. Example SLA Exceptions page

From this page, you can click a particular request number to see its details, as in the example of request 30741 in *Figure 2-9*.

Figure 2-9. Viewing an SLA from the SLA Exceptions list



3 Processing IT Demand

The HP IT Demand Management solution provides specific demand task-oriented pages to process IT demand. By using the HP IT Demand Management solution pages, you can perform the following processes:

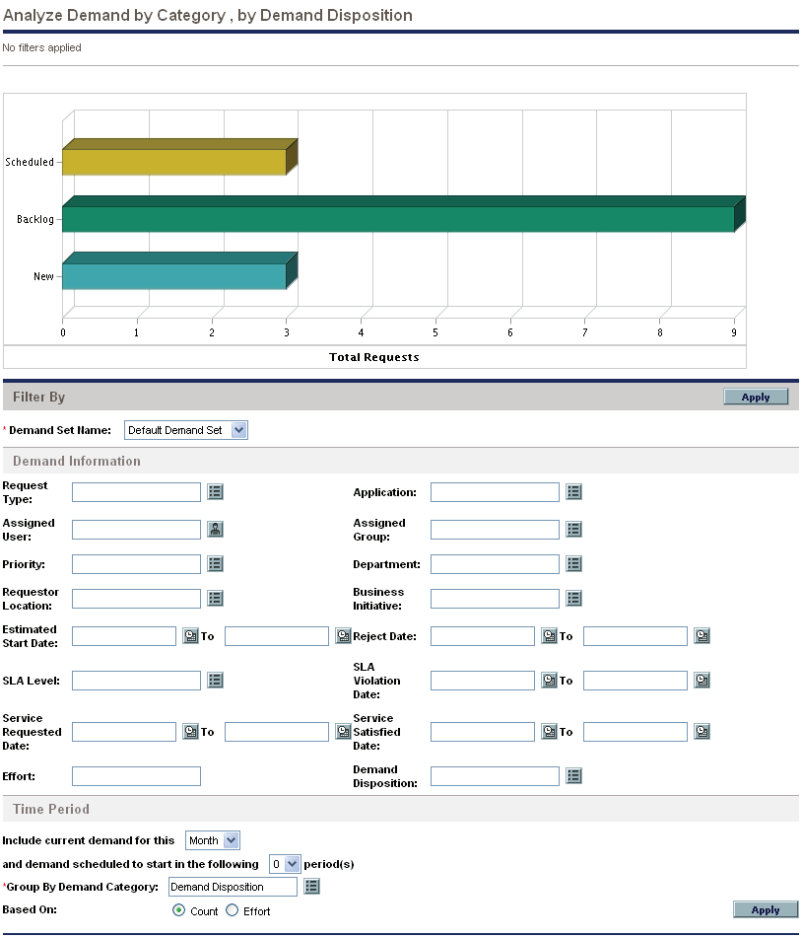
- *Analyzing IT Demand* on page 36
- *Assigning IT Demand* on page 37
- *Managing Consolidated IT Demand* on page 38
- *Scheduling and Rejecting IT Demand* on page 39

Analyzing IT Demand

The Analyze Demand by Category page provides a graphical view of IT demand in terms of the number of IT demand requests. Resting the cursor over a section of a bar in the bar graph opens a tooltip that lists more precise information about the IT demand data.

To analyze IT demand:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Demand Management > Analyze Demand by Category.** The Analyze Demand by Category page appears.



3. In the **Demand Set Name** field, select the demand set to analyze.
4. Complete the remaining fields in the **Filter By** section as needed. The filter fields determine what IT demand data is displayed and how that data is organized. For example, changing the entries in the **Time Period** section changes the time range of the IT demand data.
5. Click **Apply.**

On the Analyze Demand by Category page, IT demand is always presented in terms of the number of IT demand requests. The text at the top of the page is updated with the applied filter fields and display information.

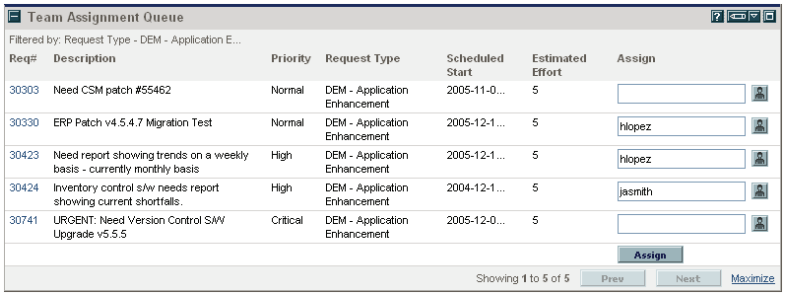
Assigning IT Demand

You can assign who will be working on the IT demand by using the Team Assignment Queue portlet on the preconfigured Team Manager PPM Dashboard page.

You can also add the Assignment Queue portlet to a PPM Dashboard page. Additionally, if the assigned workflow is configured to include an IT demand assignment workflow step, assigning a resource using the Assignment Queue portlet will satisfy the assignment workflow step.

To assign a user to an IT demand:

1. Log on to PPM Center.
2. Open the Team Manager PPM Dashboard page and see the Team Assignment Queue portlet, or open the Assignment Queue portlet.



3. In the portlet, for the IT demand (row) of interest, click the icon next to the text box in the **Assign** column and select an entry.

   The selected user is entered in the **Assign** field for that IT demand.

4. In the portlet, click **Assign.**

   The selected user is assigned to the IT demand.

Managing Consolidated IT Demand

You can configure the Manage Consolidated Demand page to display a range of data related to IT demand. The workflow associated with the IT demand is configured to include managing activities, including scheduling or rejecting the IT demand. Scheduling or rejecting IT demand using the Manage Consolidated Demand page satisfies the requirements of the workflow, and the IT demand continues moving through the workflow process.

To manage consolidated demand:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Demand Management > Manage Consolidated Demand.** The Manage Consolidated Demand page opens.
3. In the **Demand Set Name** field, select the demand set to analyze.
4. Complete the remaining fields in the **Filter By** section as needed. The filter fields determine what IT demand data is displayed and how that data is organized. For example, changing the entries in the **Time Period** section changes the time range of the IT demand data.
5. Click **Apply.**

   The text at the top of the page is updated with the applied filter fields and display information.

For more information on how to schedule and reject IT demand, see *Scheduling and Rejecting IT Demand*.

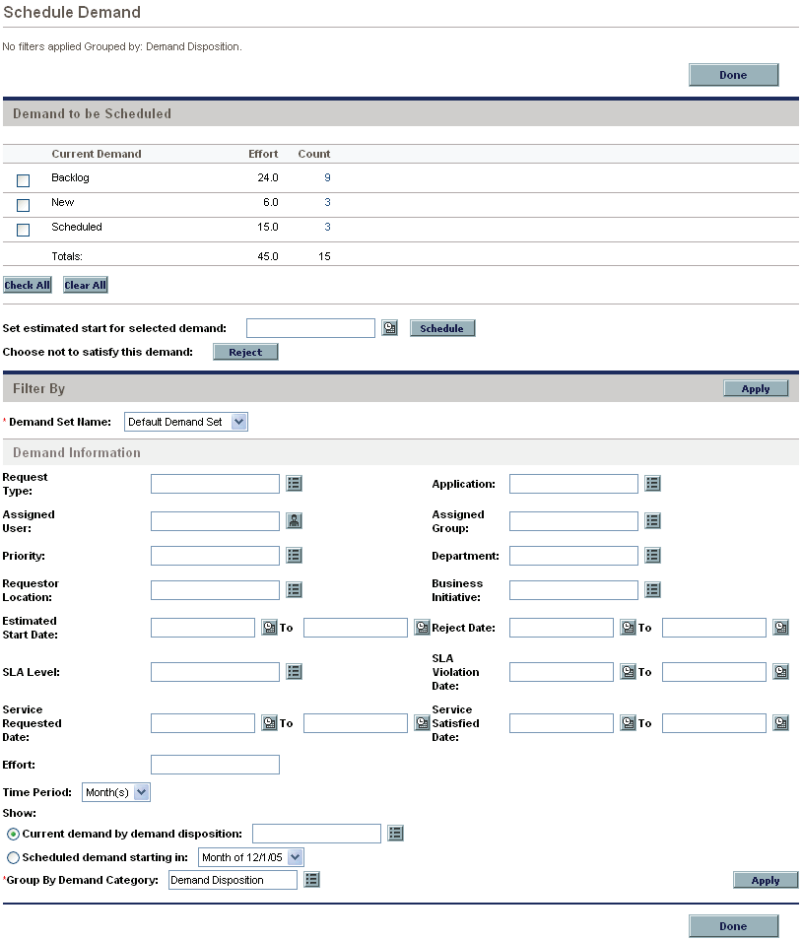
Scheduling and Rejecting IT Demand

When analyzing your IT demand, you can schedule it to begin at a later date, when the appropriate resources are available. By scheduling IT demand, you can normalize the demand being placed on your IT group. You might also decide to reject some portion of the IT demand.

The Schedule Demand page is used to schedule or reject IT demands. Often, the workflow associated with the IT demand is configured to include managing activities, including scheduling or rejecting the IT demand. Scheduling or rejecting IT demand by using the Schedule Demand page satisfies the requirements of the workflow, and the IT demand continues moving through the workflow process.

To schedule or reject an IT demand:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Demand Management > Schedule Demand.** The Schedule Demand page opens.



3. In the **Demand Set Name** field, select the demand set to analyze.

   The demand set data is loaded into the Schedule Demand page.

4. (Optional) Complete the remaining fields in the **Filter By** section as needed. The filter fields determine what IT demand data is displayed and how that data is organized. Then click **Apply.**

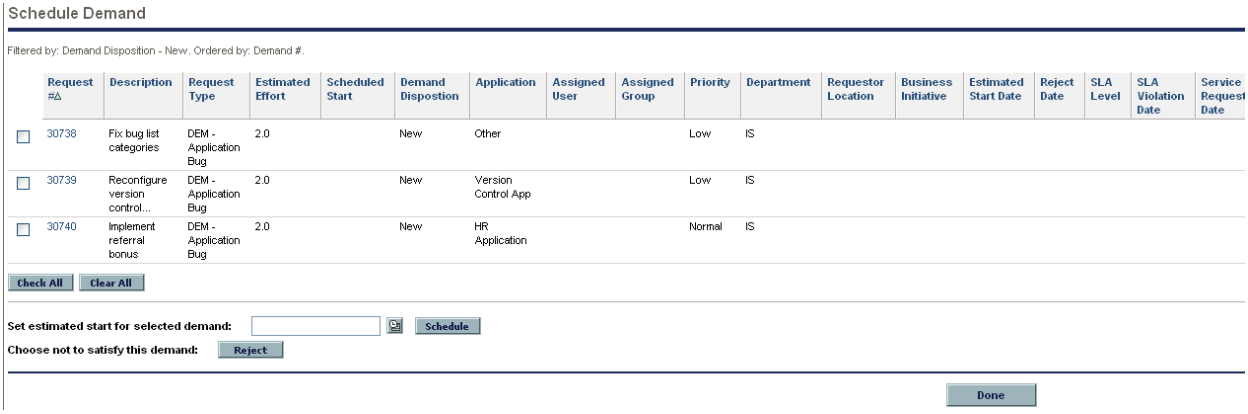
   The Schedule Demand page is reloaded with filters applied.

5. In the **Demand to be Scheduled** section of the Schedule Demand page, the IT demands that can be scheduled or rejected are listed collectively by the demand disposition shown in the **Current Demand** column.

   Select the IT demand to be scheduled or rejected:

   - To select all unscheduled IT demand, click **Check All.**
   - To select all unscheduled IT demand of a specific demand disposition, click the checkbox next to that demand disposition.
   - To select particular unscheduled IT demands, click the number in the **Count** column for the IT demands having the desired demand disposition, for example **New.**

   The Schedule Demand page reloads, listing all of the IT demands that have the demand disposition you selected.



6. Click the checkboxes next to the particular IT demands that are to be collectively scheduled or collectively rejected.

7. Schedule or reject the selected IT demand:

   - To schedule the selected IT demand, click the **Calendar** icon to the right of the **Set estimated start for selected demand** field and select a date. Then click **Schedule.** The date you selected becomes the scheduled start date for the IT demand you selected.
   - To reject the selected IT demand, click **Reject.**

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