

Mercury™ IT Governance Center

Configuring Demand Tracking and Management

Version 5.5.0

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Chapter 1 Introduction

IT receives demand from many different sources. Some demand is tracked in help desks, defect tracking systems or service request systems. Often demand gets tucked away in spreadsheets, post-it notes and e-mails. As a result, IT resources are pulled in many different directions and IT activities become misaligned with the business needs.

Mercury Demand Management provides a single application and repository to capture all Demand placed on IT. Mercury IT Governance Center consolidates information from the many different sources so you can 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 ensure the right people are working on the right activities.

Use Demand Management to:

- Capture all IT Demand from all sources
- Capture and enforce processes
- Standardize IT Demand
- Manage and schedule Demand on your organization

About This Document

This guide provides instructions for configuring Mercury Demand Management to enable the successful management of Demand on your company. This includes creating and modifying Request Types and Workflows, specifying Demand Fields and Categories to be tracked, and enabling user access to Demand Management templates and menus.



Note

This document assumes that you understand the concepts and configuration techniques outlined in *Configuring a Request Resolution System*. See that document for additional details on configuring the basic Demand Management entities, such as Workflows, Request Types and Validations.

Each chapter covers a particular topic:

<i>"Key Concepts and Definitions"</i>	Defines the key concepts and definitions used when creating a Request resolution system.
<i>"Configuring Demand Management Overview"</i>	Provides an overview of the process used to configure Demand Management to track and manage the Demand on your organization.
<i>"Gathering Requirements"</i>	Describes the information that will be needed before configuring your Demand management and tracking system.
<i>"Configuring a Demand Set"</i>	Provides instructions for configuring a Demand Set. This includes specifying the Demand Fields and mapping them to fields on each Demand Type (Request Type).
<i>"Creating Demand Types"</i>	Provides instructions for creating Demand Types. This involves specifying which Request Types will be used to track and manage your Demand.
<i>"Configuring the Workflow for Demand Management"</i>	Describes how to configure the Workflow to utilize the Demand Management functionality.
<i>"Setting up the SLAs (Validation and Rules)"</i>	Provides some guidance for configuring the SLAs for your Demand Management system.
<i>"Enabling User Access"</i>	Provides instructions for controlling access to specific features related to managing Demand. This includes controlling who can access Demand Management Dashboard templates and menu items.

Intended Audience




The intended audience for this document include:

- Business or technical users who configure and maintain processes related to Demand Management
- Users responsible for Request Type and Workflow configuration

Document Conventions

Table 1-1 lists the types of conventions used in this document.

Table 1-1. Document conventions

Convention	Description	Example
Button, menu, tabs	Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold.	Apply button
Fields, Windows, Pages	Names of windows, fields, and pages are shown as displayed.	New Request window
Code	Code input and output are shown as displayed.	CauchoConfigFile C:/ITG_Home/conf/ resin.conf
<i>Link</i>	Linked URLs, filenames, and cross references are shown as blue italicized text.	www.mercury.com
<i>Variable</i>	Variables are shown as italicized text.	<i>ITG_Home/bin</i> directory
Note	Used to identify note boxes that contain additional information.	
Caution	Used to identify caution boxes that contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data.	
Example	Used to identify example boxes that contain examples of related procedure.	

Additional Resources

Mercury Interactive provides the following additional resources to help you successfully configure Mercury IT Governance (ITG) Center:

- [Related Documentation](#)
- [Customer Support](#)
- [Education Services](#)

Related Documentation

The Library includes additional documents related to the topics discussed in this guide. Access the Library through the Mercury ITG Center online help.

<i>Installation Guide</i>	This document describes the requirements and procedures for installing and configuring Mercury ITG Center.
<i>Security Model Guide and Reference</i>	This document presents an overview of the data security model and provides instructions for controlling access to different entities.
<i>Configuring a Request Resolution System</i>	This document provides instructions for configuring a Request resolution system. This includes requirements gathering, modeling your processes in a Workflow, defining a Request Type to be integrated with the Workflow, and rolling out this system to your users.
<i>Configuring the Dashboard</i>	This document provides instructions for configuring custom Portlets, maintaining standard and custom Portlets, and setting a Default Dashboard for all users.
<i>Reports Guide and Reference</i>	This document provides details for running reports.
<i>Customizing the Standard Interface</i>	This document provides details for customizing the standard interface, including the directory structure and methods of customization for changing the presentation of the standard interface.
<i>Managing Demand (Demand Management)</i>	This document provides instructions for using Demand Management to enable the successful management of Demand in your company.

Customer Support

Customer support and downloads for Mercury ITG Center and additional product information can be accessed from the Mercury Interactive Support Web site at <http://support.mercuryinteractive.com>.

Education Services

Mercury Interactive provides a complete training curriculum to help you achieve optimal results using Mercury IT Governance Center. For more information, visit the Education Services Web site at <http://www.merc-training.com/main/ITG>.

Chapter 2

Key Concepts and Definitions

The following sections define common concepts and terms relating to Mercury Demand Management. Knowledge of these terms and concepts will help the reader gain a better understanding of deploying software and application changes in Demand Management.

This chapter covers the following topics:

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

What is Tracked as Demand?

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

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

To enable a Request Type for use with Demand Management:

1. Select or create a Request Type.
2. Attach the Demand Management Field Groups to the Request Header Type. This is performed in the Request Header Type Workbench.
3. Configure the Demand Set to include the Request Type. This is performed by selecting **Demand > Administration > Demand Sets** from the Mercury IT Governance Dashboard menu.
4. Map the Request Type fields to the Demand Fields using the Demand Sets page.

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



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

Field Groups

Field Groups are a set of fields that are delivered with Mercury IT Governance Center products to enable a quick solution implementation or to enable certain functions in Mercury ITG Center. For example, Demand Management delivers a Demand Management Scheduling fields Field Group to enable consistent tracking of information across multiple Demand Types. This Field Group is associated with a Request Type (through the Request Header Type) to enable the basic Demand Management features such as Demand scheduling and analyzing Demand Management.

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

- Demand Management Scheduling fields: This Field Group allows a Request to be scheduled with Demand Management.
- (Optional) Demand Management SLA Fields: This Field Group contains the fields necessary to manage Requests with SLA.

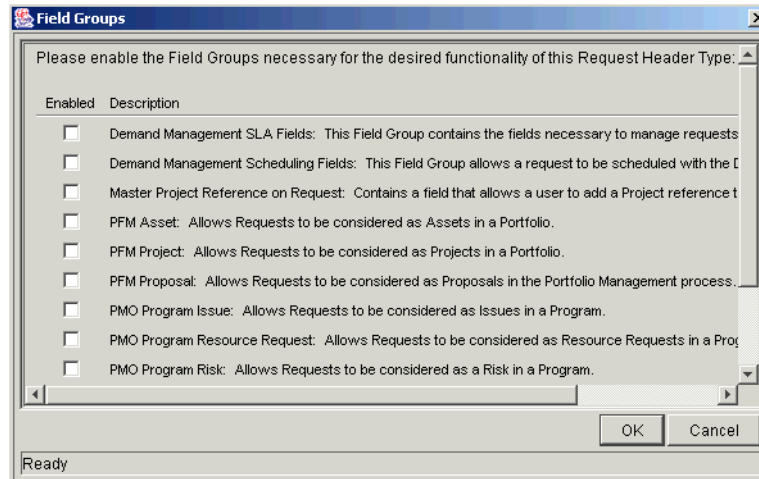


Figure 2-1 Field Groups Window in the Request Header Type Workbench

Demand Field (Demand Category)

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

Demand Fields are introduced into your Demand Sets using the **Demand > Administration > Demand Sets** page. Using the Demand Sets page, you can create new Demand Fields and then map them to fields in Request Types.

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



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

Search Validation

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

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

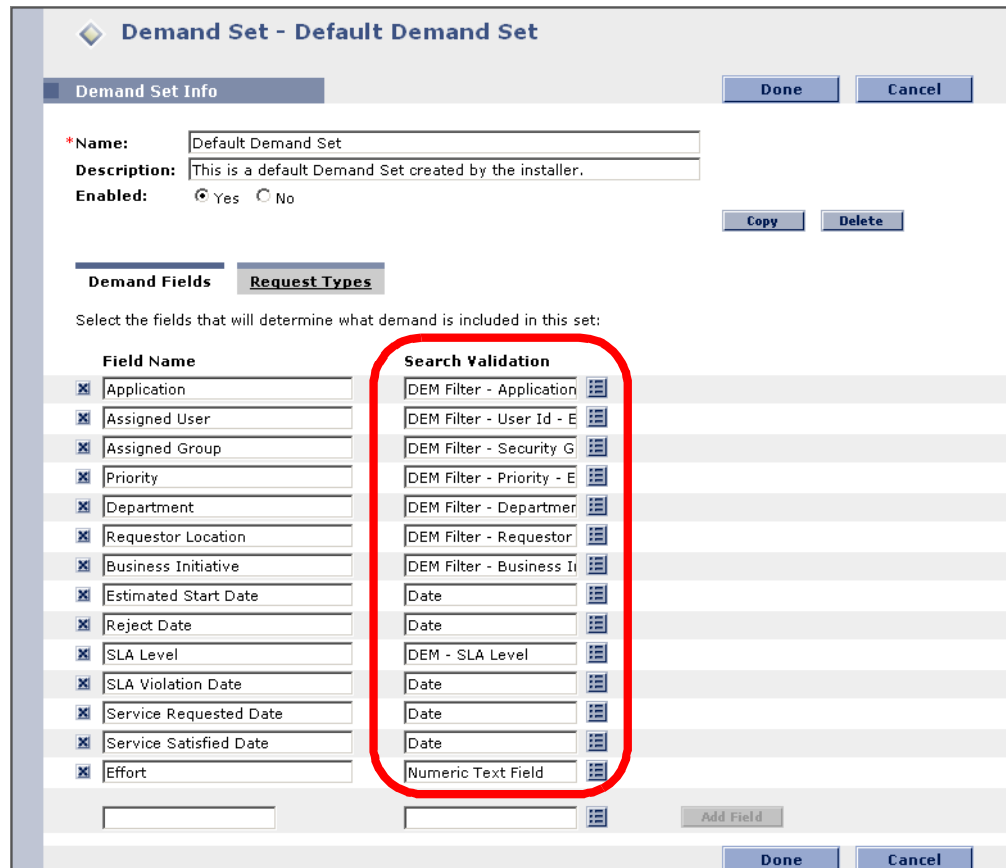


Figure 2-2

Demand Set

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

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

Workflow Step - Transitioning on Scheduling Event

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

Dashboard Template

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

Advance users can modify templates or create custom templates to be imported. For more information on working with templates, see *Customizing the Standard Interface*.

Menu Security

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

Demand Mgmt: Manage Demands

The Demand Management menus are defined XML files. Advanced users can customize these menus to provide alternate navigation, additional menu items, and alternate menu security. See *Customizing the Standard Interface* for additional details.

SLA

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

Chapter 3

Configuring Demand Management Overview

This chapter provides an overview of the process used to configure Mercury Demand Management to track and manage the Demand on your organization. The following summarizes each phase of configuration. Additional details for configuration are included in the referenced chapters.

To configure Demand Management:

1. Gather requirements for your Demand Management implementation.

This includes determining which Request Types and Workflows will be used as well as the Demand Fields (categories) to be tracked in each Request Type. See *“Gathering Requirements”* on page 17 for details.

2. Create the Demand Types.

This includes configuring Request Types and their associated Request Header Types to include the Demand Management Field Group. This also includes configuring the SLAs in the Request Types. See *“Creating Demand Types”* on page 19 for details.

3. Configure the Demand Set.

This includes configuring the Demand Fields and mapping them to fields on each Demand Type (Request Type). See *“Configuring a Demand Set”* on page 23 for details.

4. Configure the Workflow for Demand tracking and management.

This includes using special Workflow transitions that will enable certain Demand scheduling features. See *“Configuring the Workflow for Demand Management”* on page 31 for details.

5. Set up the SLA.

This includes configuring the SLA rules and Validations in the Demand Type. See [“Setting up the SLAs \(Validation and Rules\)”](#) on page 33 for details.

6. Enable user access to menus and templates.

This includes configuring User accounts and Security Groups to control who can access certain Demand Management functionality. See [“Enabling User Access”](#) on page 41 for details.

Chapter 4

Gathering Requirements

The first step in configuring Demand Management is to gather the Demand requirements. This chapter lists the information required to configure Mercury Demand Management.

The following is a list of the information you need to collect to enable Demand Management:

- **Determine the Demand Types.**
Decide which Request Types will be used to capture Demand. This can be existing Request Types, Request Types delivered as part of Demand Management, or new custom Request Types developed on-site.
- **Determine the Demand Fields (Categories).**
Decide how you want to categorize your Demand. This will translate into the Demand Fields (Demand Categories) For example, you may want to include a Demand Field for “Business Initiative.” You could then manage and analyze the Demand based on the Business Initiative. Demand Fields need to be consistently tracked across all of your Demand Types (Request Types). These fields will be specified when creating a Demand Set. Once the fields of the Demand Set are specified, they can then be mapped to fields on the Request Type.
- **Determine your SLA requirements.**
Decide on the levels of support your IT organization provides. SLAs are configured using the Request Type rules and Validations.
- **Determine which Mercury IT Governance Workflows will be used.**
Decide on the Mercury ITG Workflows used by Demand Management. Requests are routed through their associated Workflow. Additionally, each associated Workflow might need to be modified to enable some Demand scheduling features.

Chapter 5

Creating Demand Types

Once the Mercury Demand Management requirements are gathered, you can configure the Demand Types. Demand Types are Request Types customized to include one or both of the Demand Management Field Groups. This chapter provides instructions for creating Demand Types.

This chapter covers the following topics:

- *Overview: Creating a Demand Type*
- *Adding the Field Groups to a Request Type*
- *Adding a Request Type to a Demand Set*

Overview: Creating a Demand Type

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

To create a Demand Type:

1. Add the Demand Management Field Groups to the Request Type.

The Demand Management Field Groups are:

- Demand Management SLA Fields
 - Demand Management Scheduling Fields
2. Add the Request Types to a Demand Set.



A fresh Mercury Demand Management installation consists of the following Demand Types:

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

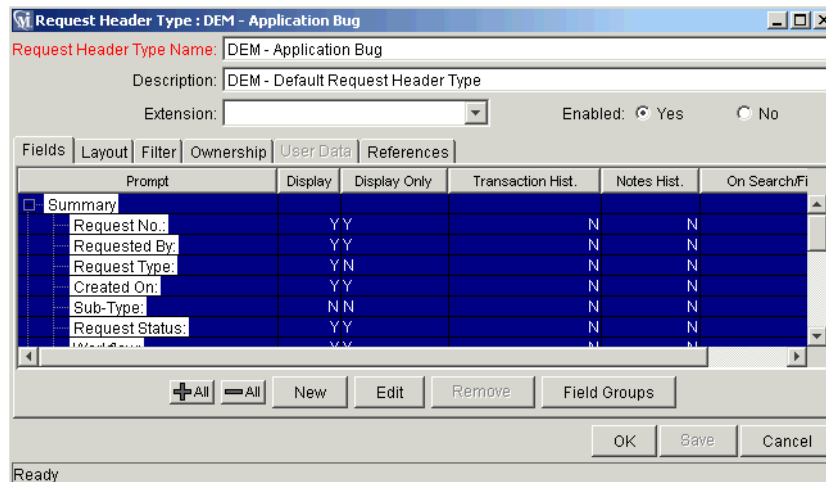
Adding the Field Groups to a Request Type

This procedure details how to add the Demand Management Field Groups to a Request Type.

To add a Field Group:

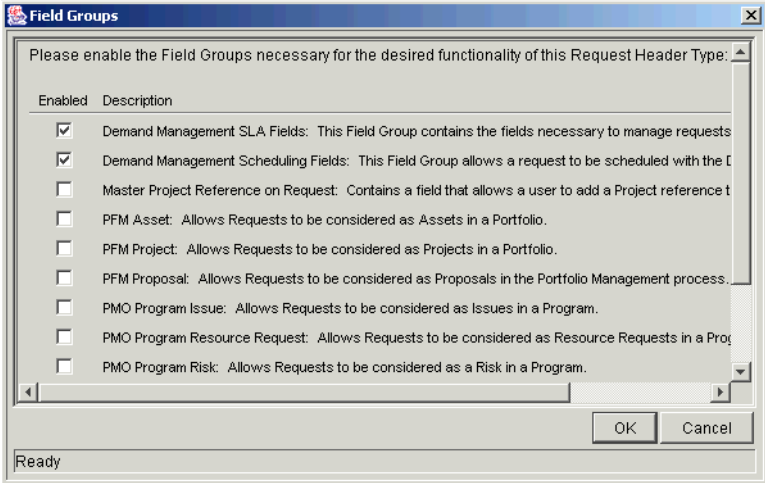
1. From the Workbench, open or create a Request Type.
2. Open the Request Type window.
3. Click **Open** under the Request Header Type field.

The specified Request Header Type window opens.



4. Click **Field Groups**.

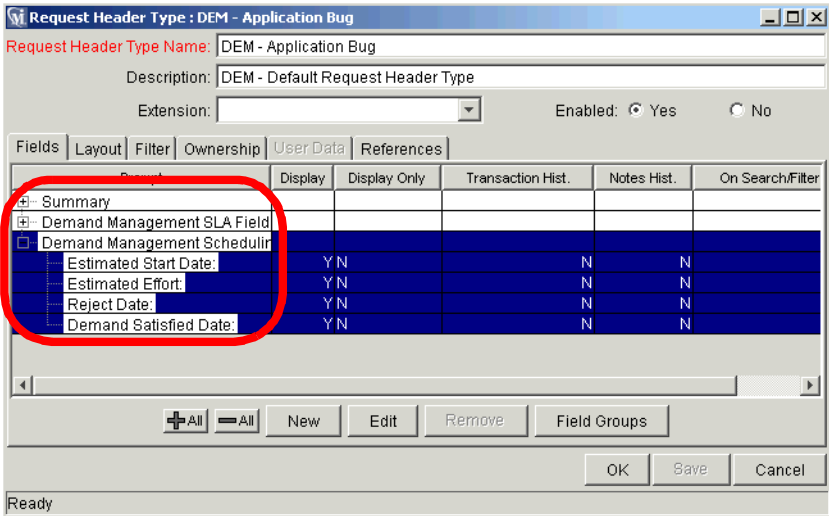
The Field Groups window opens.



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

6. Click **OK**.

The selected Field Groups appear on the Request Header Type.



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

Adding a Request Type to a Demand Set

Once a Demand Request Type is created, it must be added to a Demand Set. To add a Request Type to a Demand Set, see [“Adding a Request Type to a Demand Set”](#) on page 26.

Chapter 6

Configuring a Demand Set

Once Mercury Demand Management Demand Types are configured, they can be added to a Demand Set. Demand Sets enable you to separate Demand into different categories. Each Demand Set can include a unique group of Demand Fields and Demand Types (Request Types). This chapter provides instructions on how to configure a Demand Set.

This chapter covers the following topics:

- [Creating Demand Sets](#)
- [Creating Demand Fields \(Categories\)](#)
- [Adding a Request Type to a Demand Set](#)

Creating Demand Sets

To create a Demand Set:

1. From the Dashboard menu bar, click **Demand > Administration > Demand Sets**.

The Demand Sets page opens.

Demand Sets

Demand Set defines what is counted as demand for different parts of the organization. This allows management of demand by multiple groups within the same installation of Mercury IT Governance Center. This installation's Demand Sets are listed below:

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

[Create New Demand Set](#)

Done

2. Click **Create New Demand Set**.

Demand Set - New Demand Set

Demand Set Info Done Cancel

*Name: New Demand Set
Description:
Enabled: Yes No Copy Delete

Demand Fields **Request Types**

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

Field Name	Search Validation
<input type="text"/>	<input type="text"/>

Add Field Done Cancel

3. In Name, enter the name of the new Demand Set.
4. In Description, enter a description of the new Demand Set.
5. In Enabled, make sure Yes is checked.
6. Click **Done**.

The Demand Set is created.

Creating Demand Fields (Categories)

You can add or configure Demand Fields to be used across all Demand Types in your Demand Set. Demand Fields are used throughout Mercury Demand Management. For example, Demand Fields are used to organize/display information in the Demand Management Portlets. The Demand Categories appear as filtering categories and in the Grouped By drop down list in the Demand by Category Portlet.

To create a Demand Field:

1. From the Dashboard menu, click **Demand > Administration > Demand Sets**.
The Demand Sets page opens.
2. Open the Demand Set.

Demand Set - Default Demand Set

Demand Set Info Done Cancel

*Name:

Description:

Enabled: Yes No Copy Delete

Demand Fields **Request Types**

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

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

Add Field

Done Cancel

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3. In Field Name, enter text into the blank field.

4. Select a Search Validation.

See [“Search Validation”](#) on page 10 for more information.

5. Click **Add Field**.

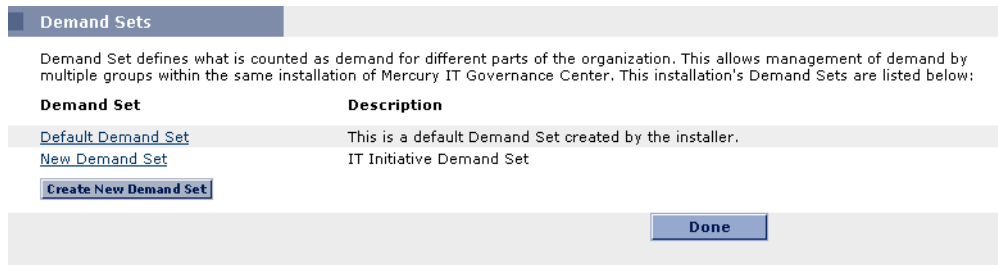
The Demand Field is added to the Demand Set. You will need to map the new Demand Field a Request Type field for each Request Type in your Demand Set.

Adding a Request Type to a Demand Set

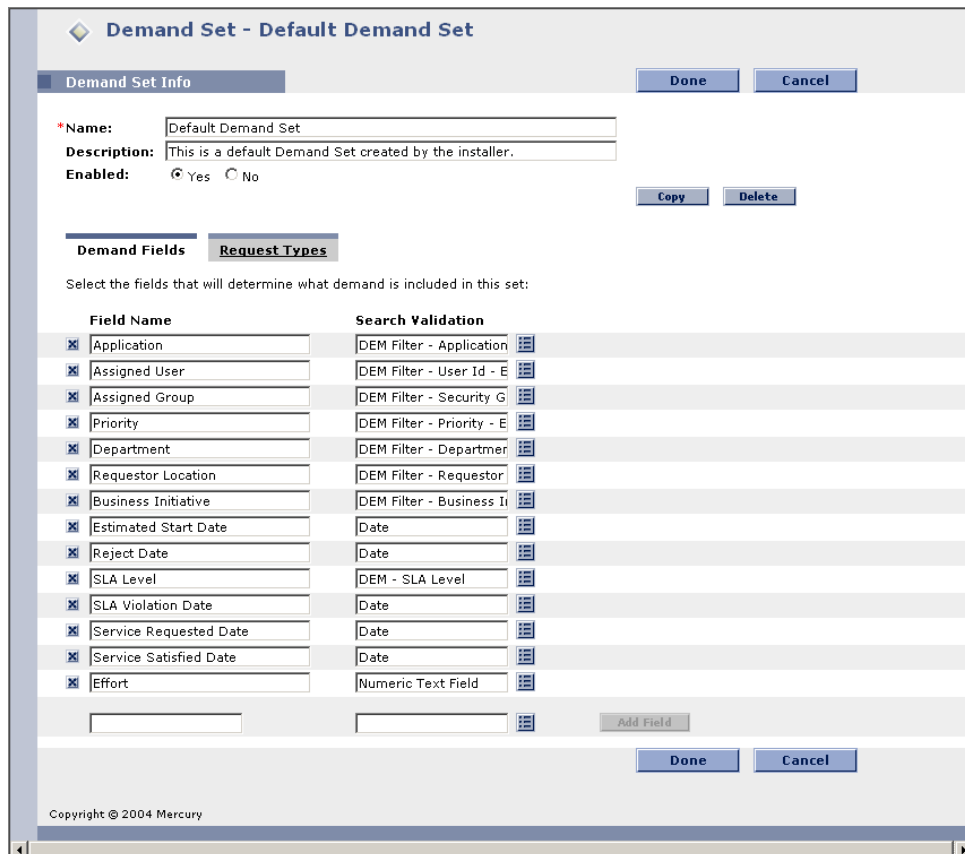
To add a Request Type to a Demand Set:

1. From the Dashboard menu bar, click **Demand > Administration > Demand Sets**.

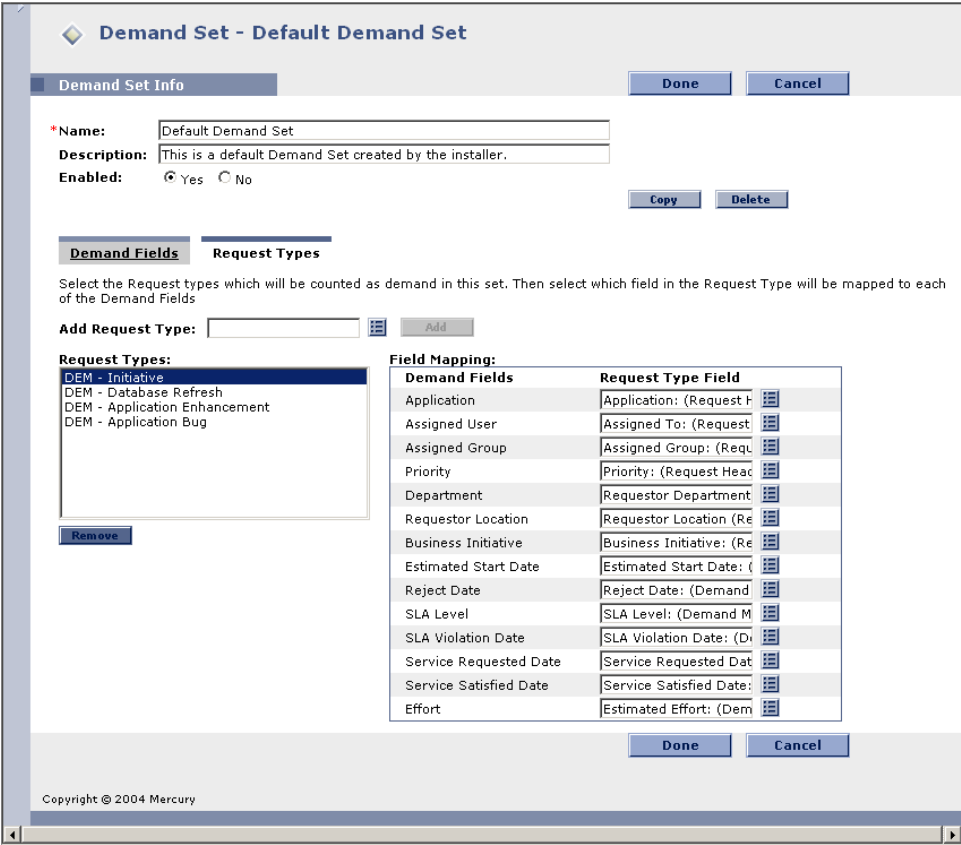
The Demand Sets page opens.



2. Open the Demand Set.



3. Click the **Request Types** tab.



4. In **Add Request Type**, select the Request Type to add to the Demand Set.

Demand Set - Default Demand Set

Demand Set Info Done Cancel

*Name:
 Description:
 Enabled: Yes No Copy Delete

Demand Fields **Request Types**

Select the Request types which will be counted as demand in this set. Then select which field in the Request Type will be mapped to each of the Demand Fields

Add Request Type: Add

Request Types:
 DEM - Initiative
 DEM - Database Refresh
 DEM - Application Enhancement
 DEM - Application Bug
 PMO - Issue Remove

Field Mapping:

Demand Fields	Request Type Field
Application	<input type="text"/>
Assigned User	<input type="text"/>
Assigned Group	<input type="text"/>
Priority	<input type="text"/>
Department	<input type="text"/>
Requestor Location	<input type="text"/>
Business Initiative	<input type="text"/>
Estimated Start Date	<input type="text"/>
Reject Date	<input type="text"/>
SLA Level	<input type="text"/>
SLA Violation Date	<input type="text"/>
Service Requested Date	<input type="text"/>
Service Satisfied Date	<input type="text"/>
Effort	<input type="text"/>

Done Cancel

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- In the Field Mapping section, map the Demand Fields to fields on the Request Type.

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

- Click **Done**.

The Request Type is added to the Demand Set.



Note

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

Because of the scope of database changes, you should re-run the Database Statistics on your Mercury IT Governance Center Database. Instructions for this are included in the "*System Administration Guide*". Contact your application administrator for help with this procedure.

Chapter 7

Configuring the Workflow for Demand Management

The Scheduled, Rejected and Assigned functions of Mercury Demand Management interact directly with Mercury IT Governance Workflows. When a Request is Scheduled, Rejected or Assigned, the Request checks the current Workflow step. If the Workflow step has is configured with a scheduling-related transition, it will follow the transition out of the step. If the current Workflow step does not have this transition defined, no processing will happen, but the Demand will still be marked as scheduled, rejected or assigned.

Demand Management includes an additional method for transitioning out of a Workflow decision step that coincides with a Demand scheduling event. Select **Specific Event** in the Define Transition window (see [Figure 7-1](#)). You can then specify the specific event for the transition.

Demand Management supports the following events:

- Assignment
- Schedule Demand
- Reject Demand

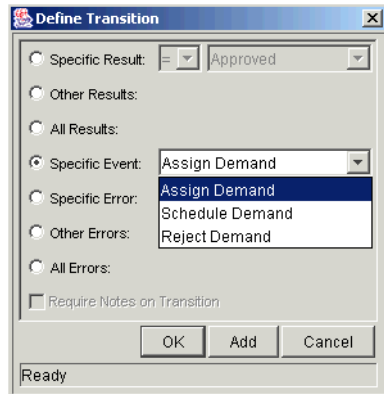


Figure 7-1 Specific Event Transition from a Workflow Step

A Demand Management event will not occur if one of the following conditions exist:

- If there is required look-ahead for the transition. The exception to this exception is when the look-ahead requires you to enter an Assigned To user during the assignment of Demand.
- If you do not have the correct security permissions (Request Type and Workflow step) to transition out of the Workflow step.
- If the Request is locked (being edited) by another user.

If the scheduling, assignment, or rejecting event does not work, an error message is returned. See [Figure 7-2](#) for an example of an event error message.



Figure 7-2 Error Message

Chapter 8

Setting up the SLAs (Validation and Rules)

Once the Demand Types, Demand Sets and Workflows are configured, the SLA can be configured. SLAs are configured using the Request Type rules and Validations. SLAs can be enabled for all Demand Types. This chapter provides guidance for configuring the SLAs for Demand Management.

This chapter covers the following topics:

- [SLA Behavior \(Example\)](#)
- [SLA Set Up – Rules](#)



Note

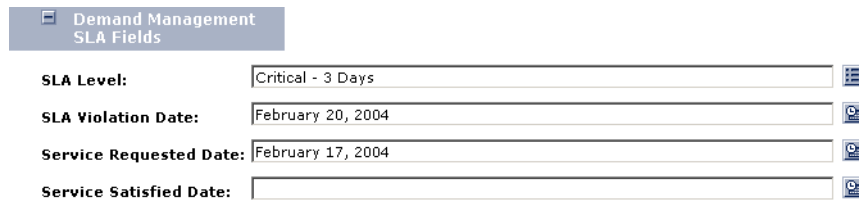
In the default Demand Management installation, SLAs are only enabled for the Database Refresh Demand Type.

This chapter presents the Database Refresh SLA configuration as an example.

SLA Behavior (Example)

SLA behavior is driven by the Demand Management SLA Fields on the Request Type. The following is a list of the SLA Fields (see [Figure 8-1](#)):

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



The screenshot shows a form titled "Demand Management SLA Fields". It contains four input fields, each with a small icon to its right:

- SLA Level:** Critical - 3 Days
- SLA Violation Date:** February 20, 2004
- Service Requested Date:** February 17, 2004
- Service Satisfied Date:** (empty)

Figure 8-1 Demand Management SLA Fields

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



Note

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

The Service Satisfied Date denotes the end of the Request resolution process. The Demand can be set to satisfied at any point in the process.

SLA Set Up – Rules

The SLA behavior is based on the Request Type rules and Workflow configurations. [Figure 8-2](#) illustrates the SLA Fields for the DEM - Database Refresh Request Type. The following is the list of the Database Refresh rules:

- *SLA Level*
- *SLA Violation Date*
- *Service Request Date*
- *Service Satisfied Date*

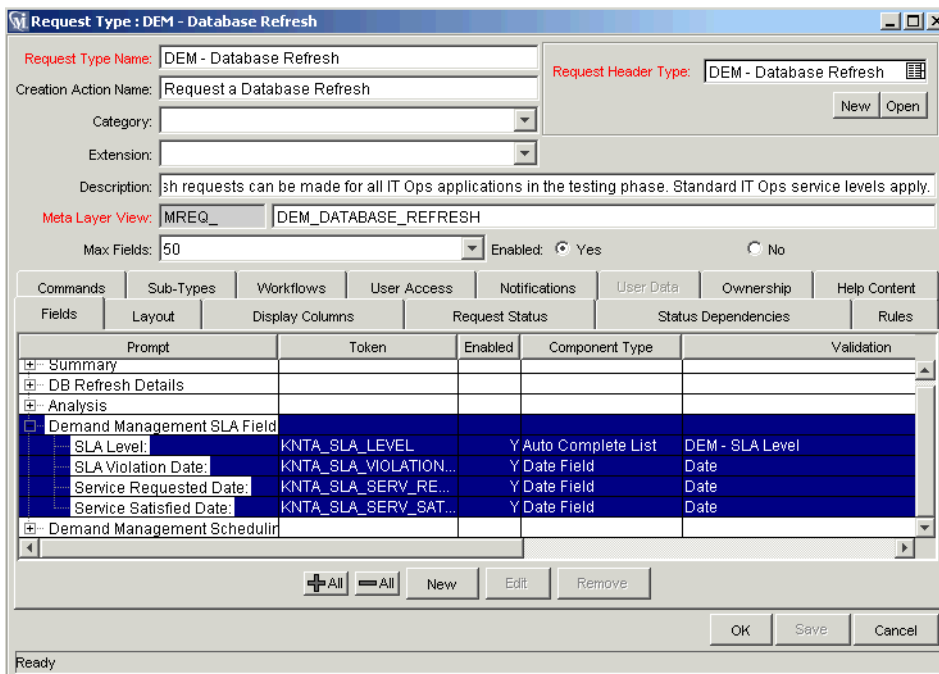


Figure 8-2 Dem - Database Refresh Request Type



Note

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

SLA Level

The SLA Level field is set by a Rule based on the priority of the Request. The Validation for the SLA Level field is DEM - SLA Level. [Figure 8-3](#) illustrates the Rules window and Validation for SLA Level. The default values for the DEM - SLA Level Validation are:

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

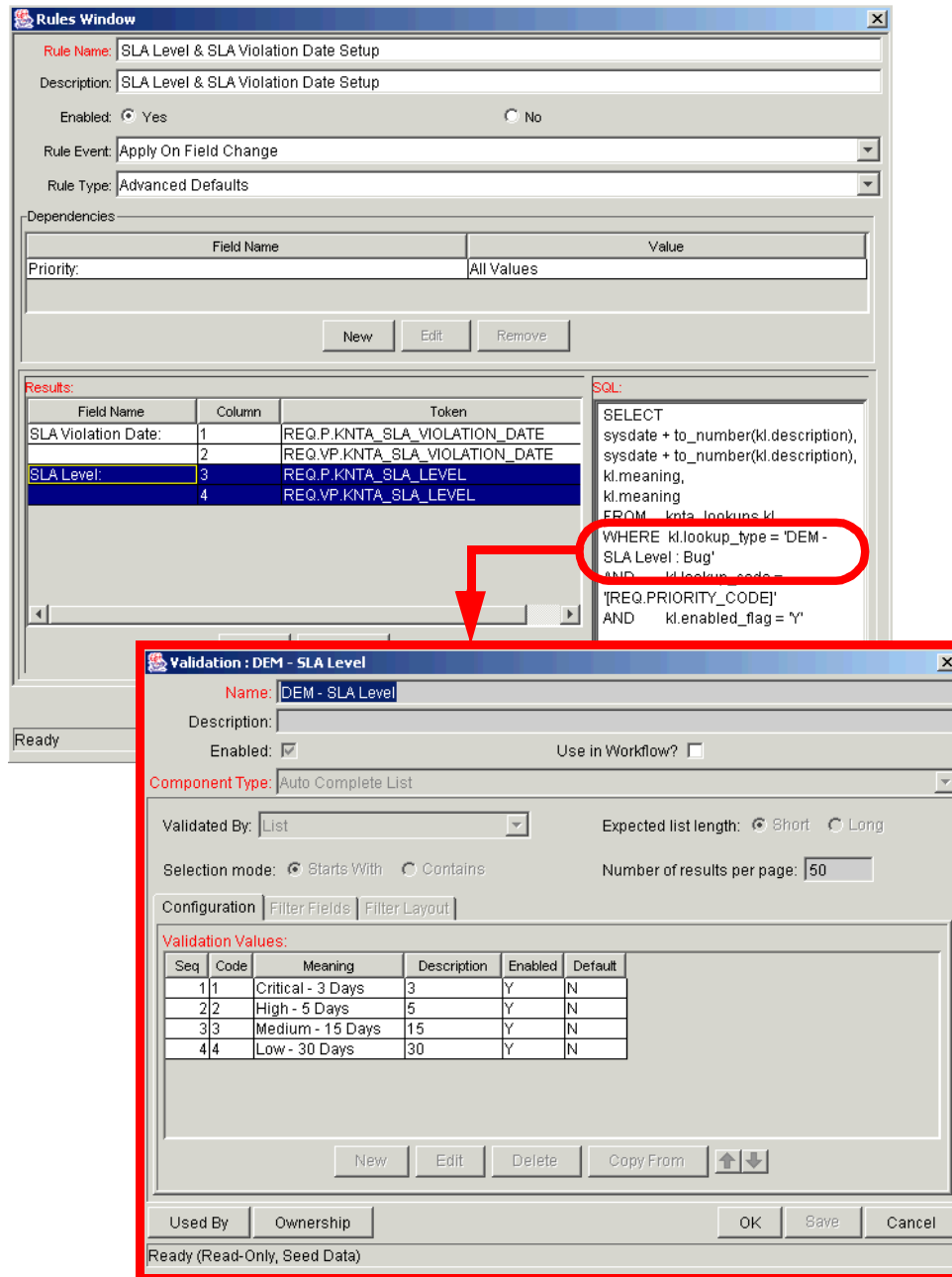


Figure 8-3 SLA Level Rule and Validation

SLA Violation Date

The SLA Violation Date is set by a Rule based on the Service Level and Service Requested Date values. The SLA Violation Date equals the Service Requested Date

value plus the time dictated by the Service Level Validation. *Figure 8-4* illustrates the Rules window for SLA Violation Date.

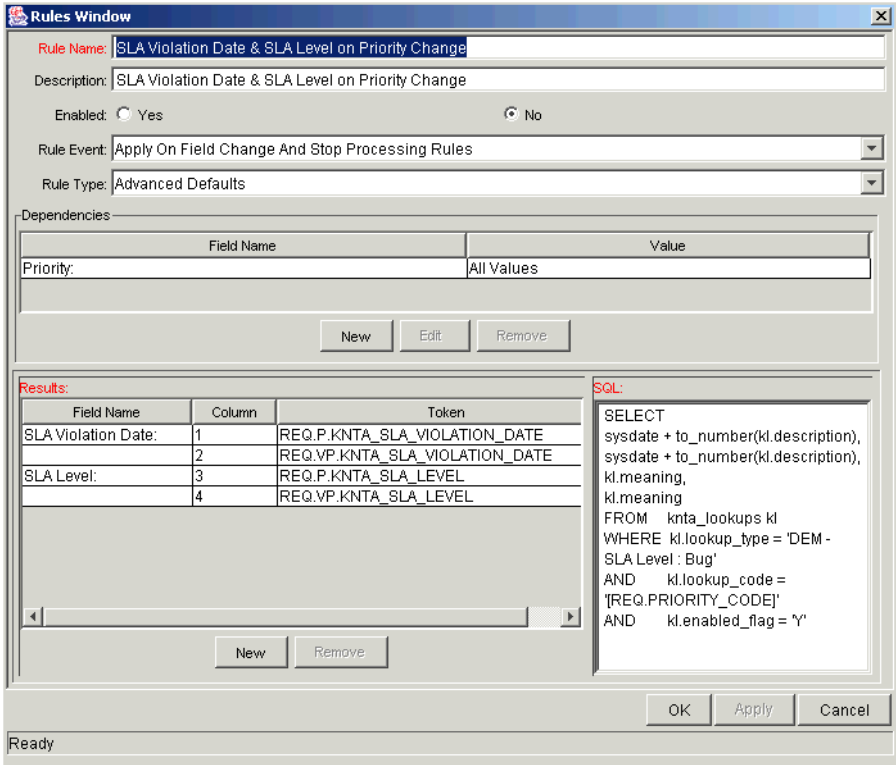


Figure 8-4 SLA Violation Date Rule

Service Request Date

The Service Requested Date is set by a Rule to the creation date of the Request. The Service Requested Date could be set to correlate with any Workflow step. *Figure 8-5* illustrates the the Rules window for Service Requested Date.

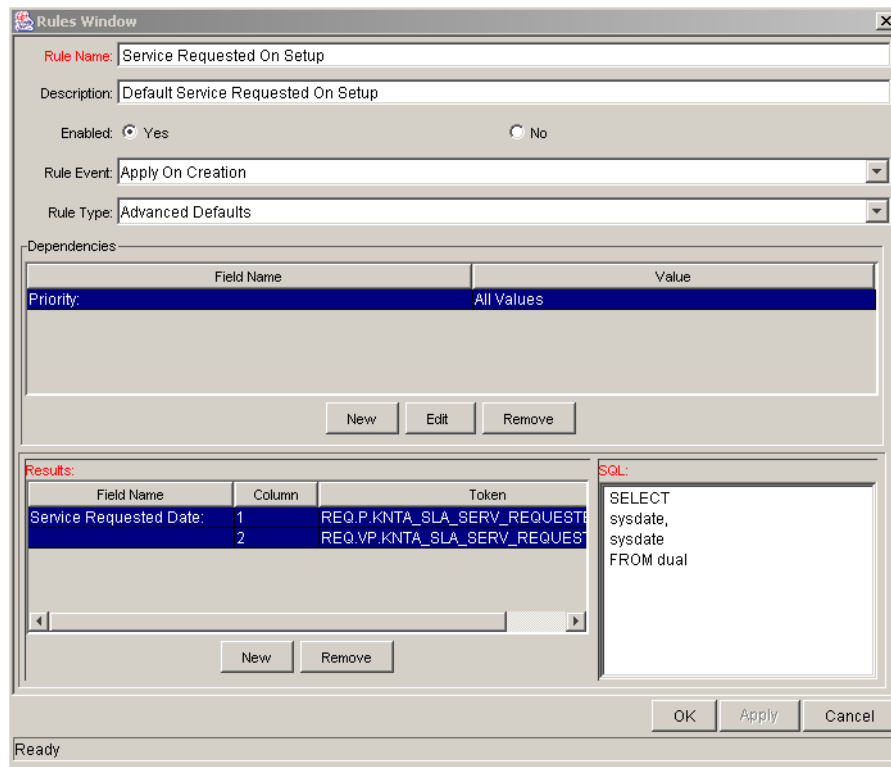


Figure 8-5 Service Request Date Rule

Service Satisfied Date

The Service Satisfied Date is set by the execution Workflow Step, DEM - SLA Satisfied On. *Figure 8-6* illustrates the DEM - SLA Satisfied On execution step in the Database Refresh Workflow.

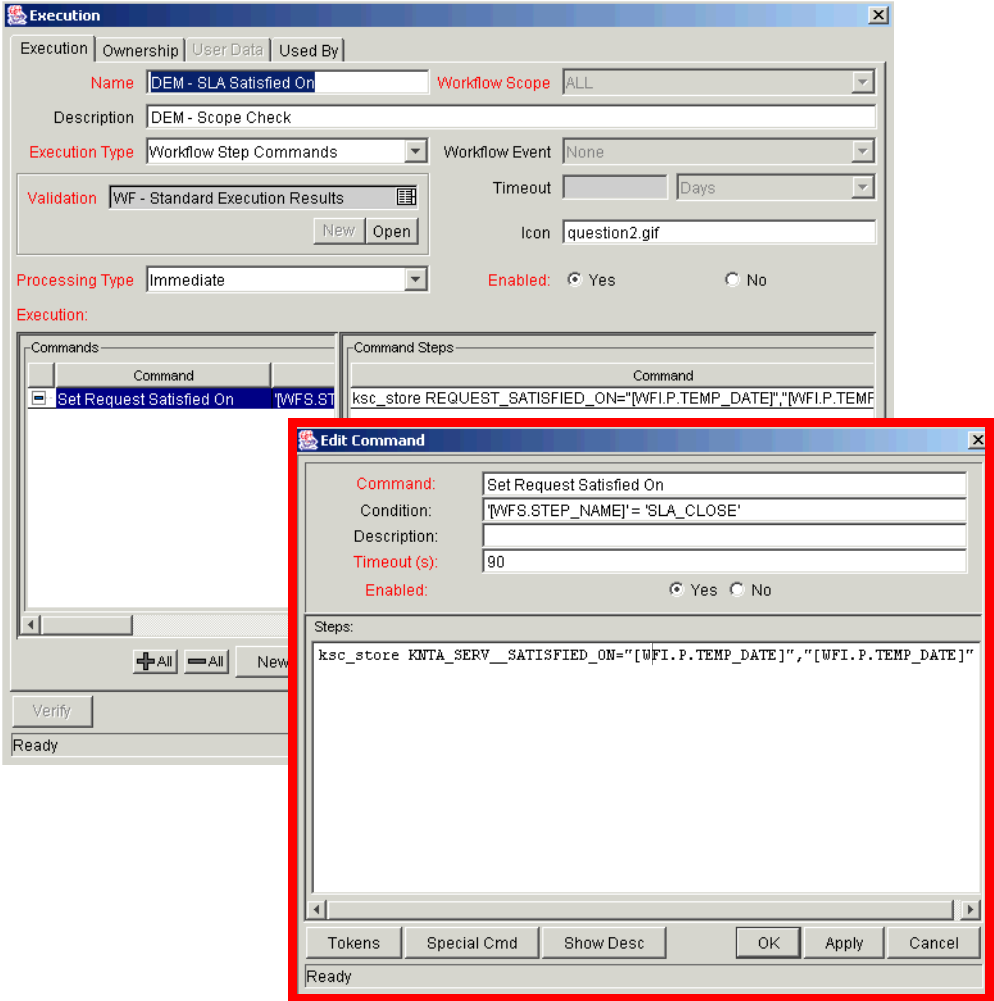


Figure 8-6 Database Refresh Workflow Execution

Chapter

9

Enabling User Access

Mercury IT Governance Center provides licenses, Security Groups and Access Grants to access all of the features of Mercury Demand Management. This chapter provides instructions for controlling access to specific Demand Management features.

This chapter covers the following topics:

- [Enabling General Access](#)
- [Controlling Configuration Access](#)



Note

You can also use standard data and process security techniques as outlined in *Security Model Guide and Reference* to control access to Demand Management features.

Enabling General Access

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

Controlling Configuration Access

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

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



Note

You must have the correct Access Grants to modify User accounts or Security Groups. See the application administrator at your site to make changes to either of these entities.

See the *Security Model Guide and Reference* for details on controlling who can alter your configurations.

Appendix

A

Estimated Effort in Demand Management

Mercury Demand Management allows you to analyze Demand based on the pure number (count) of Demand Requests. Demand can also be normalized based on effort.

Example

You have 10 Requests for Database Refreshes and 10 Requests for Bug Fixes. If a Database Refresh takes 1 hour to fulfill and a bug fix takes 2 days to fulfill, it may be more meaningful for the organization to factor in the effort involved in fulfilling Demand.

Note

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

You can configure a default effort value for a specific Request Type. This effort value can be reconfirmed or changed during an analysis phase at a later step in the process. The following are a few examples of how you can set the default effort for a Request Type:

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

Appendix

B

Customizing Menus and Templates

Mercury Demand Management templates and menus are delivered as xml files on the Mercury IT Governance file system. Users can customize these templates and menus by creating new files or altering existing xml files. See *Customizing the Standard Interface* for a description of the main elements of the template and menu files and instructions on how to modify them.

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