Mercury™ IT Governance Center

Managing Demand (Demand 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 the Demand on your organization

About This Document

This guide describes how to navigate and use Demand Management. Each chapter covers a specific topic on navigation or usage:

"Key Concepts and Definitions"	Describes the general concepts of Demand Management.

"Demand Management User Interface Overview"	Details the user components of the Demand Management interface.
"Setting Up Demand Management"	Provides step-by-step procedures on how to configure Demand Management for the standard interface.
"Creating Demand"	Details how to create Demand using Demand Management Request Types.
"Viewing Demand"	Shows how to view Demand using the Portlets of Demand Management.
"Processing Demand"	Provides step-by-step procedures on how to analyze, manage, assign users, schedule and reject Demand.
"Demand Management Reports"	Lists the Demand Management reports and shows how to run a Demand Management report.
"Demand Management Request Types and Workflows"	Lists the Demand Management Request Types and their associated Workflows.

Intended Audience

The intended audience for this document includes:

- Users of Demand Management
- Managers who create and manage IT Demand
- Business users responsible for reporting on IT Demand

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`
Link	Linked URLs, filenames, and cross references are shown as blue italicized text.	*www.mercury.com*
Variable	Variables are shown as italicized text.	*ITG_Home*/bin directory
Note	Used to identify note boxes that contain additional information.	Note
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.	Caution
Example	Used to identify example boxes that contain examples of related procedure.	Example

Additional Resources

Mercury Interactive provides the following additional resources to help you successfully use Mercury 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.

Using the Dashboard	This document provides details for defining and configuring the Dashboard and custom Portlets.
Processing Requests (Demand Management)	This document explains how to process Requests using Demand Management.
Configuring Demand Tracking and Management	This document provides instructions for configuring a Demand Management system. This includes requirements gathering, modeling processes in a Workflow, defining a Request Type to be integrated with the Workflow, and rolling out a Demand Management system to users.
Security Model Guide and Reference	This document presents an overview of the data security model and provides instructions for controlling access to different entities.

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 the Mercury ITG 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 the common concepts and terms related to Mercury Demand Management. Knowledge of these terms will help the reader gain a better understanding of Demand Management usage.

This chapter covers the following topics:

Demand

A Demand is an item of work requested from a business unit. Demand Management provides a single application and repository to capture all demand placed on IT. In Demand Management, each item of demand is captured and processed at the Request level. Demand is captured using the Request resolution features of Demand Management. It can then be analyzed and consolidated as it proceeds through a pre-configured resolution process (defined in the Workflow). Interacting with the resolution process, the Demand proceeds through different states and is eventually resolved (satisfied or unsatisfied).

Figure 2-1 illustrates the Demand's interaction with the Request resolution process.

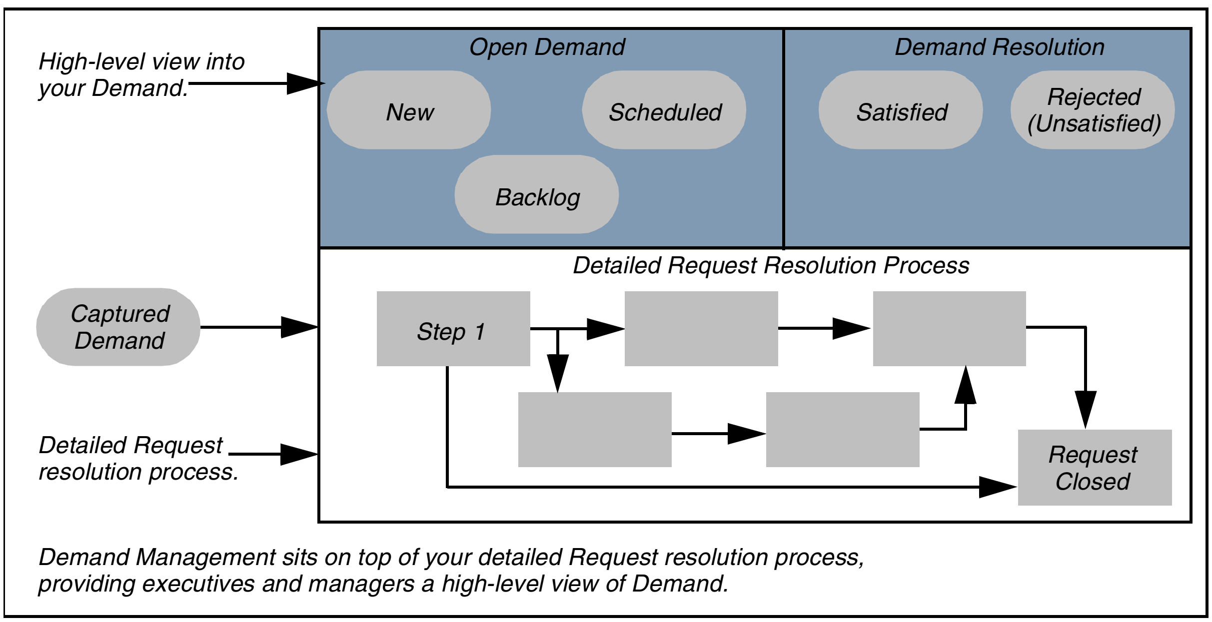


Figure 2-1 Life of Demand

Request

A Request is the fundamental work unit of the Request resolution piece of Demand Management. End-users create Requests and then submit them along a resolution process (defined in the Workflow). The Request page contains all of the information that is typically required to complete a specific business process. Requests with similar or related functions can be grouped into Request Categories, making them easier to locate and use.

Each Request has an associated Request Type that determines which fields are included in the Request page. When the basic Request information has been entered, and the Request submitted, a corresponding Workflow is automatically selected based on the Request Type. As the Request goes through its process steps, you are prompted for all of the information necessary to move the Request to the next step.

Definition

A Request:

- Is the fundamental "work unit" within Demand Management.
- Is the repository for all of the information necessary to take a series of actions and move through a standard business process.
- Is a specific execution of a business process. Each Request is identified by a unique Request Number.

Request Type

A Request Type is a general category that defines the structure of the Request. Demand Management includes such pre-defined system Request Types as the DEM - Application Bug and DEM - Application Enhancement. The fields that are used when a Request is created are customizable based on the Request Type. Request Type definitions control much of the Request-specific logic in the resolution process. This includes such things as:

- Defaulting to a specific Workflow to use when processing this type of Request
- Custom field definition and behavior
- Layout
- Data access and security (who can view or edit the Request)
- Configuration security (who can alter the Request Type)
- Notifications

Definition

A Request Type:

- Is the framework that defines the behavior of a Request as it moves through a business process.
- Determines the logic behind the storage and manipulation of data within a Request.
- Represents a process within a business. The Request Type can be defined to capture different kinds of data and follow different business and resolution processes.

Demand Types

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. *Figure 2-2* shows the seeded Demand Management Demand Types.

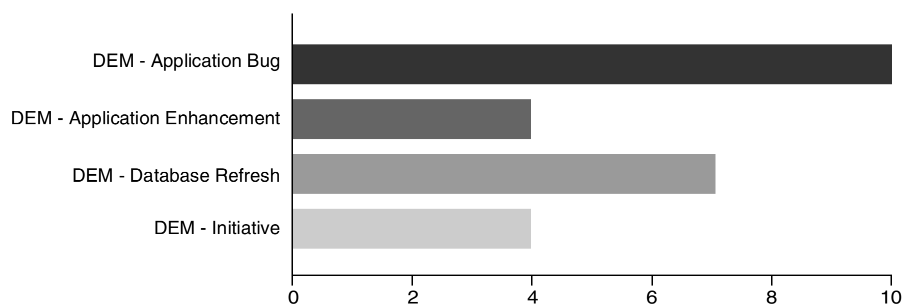


Figure 2-2 Demand Types

Demand Fields (Categories)

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 Set

A Demand Set is a self-contained configuration for Demand Management that allows multiple groups to manage Demand unique to their business needs. A Demand Set includes a set of Request Types to be tracked as Demand. Each Demand Set can also map a Request Type field to a Demand Field. When analyzing or managing Demand in Mercury ITG Center, you can select a Demand Set that has been configured specifically for the needs of your group.

Demand Disposition

Demand Disposition represents the state of the Demand. Demand can be categorized as new, backlog, or scheduled during the resolution process. *Figure 2-3* illustrates how Demand can proceed through the new, scheduled and backlog states.

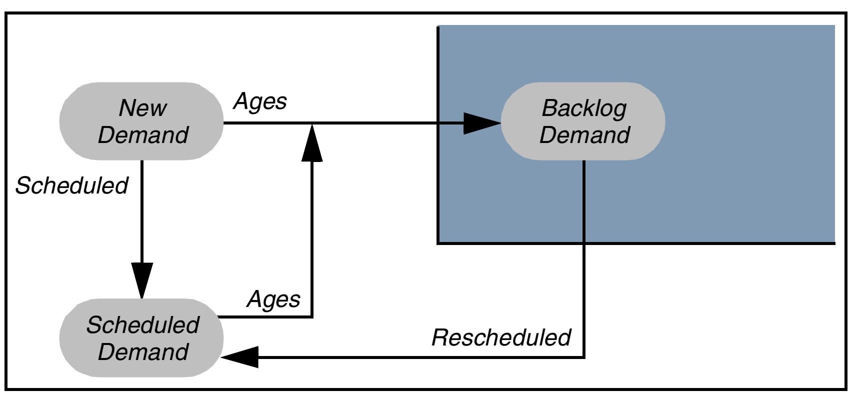


Figure 2-3 Demand Disposition

Portlet

Portlets are configurable, role-based visual displays that provide relevant summary information of business data. Multiple Portlets can be displayed on a single HTML page. He can select which Portlets they would like to display on his Dashboard. They can then personalize those Portlets to display only the information that is relevant specifically to their Projects, Tasks, Packages, or Requests.

In addition to providing relevant information for higher visibility, Portlets also provide the user with the ability to drill down into the details of the Project, Task, Request or Package. This enables the user to access and update information from a single Web page.

Mercury ITG Center includes a set of Portlets for Demand Management. These Portlets are designed to provide the most efficient and flexible access to your Demand Management data. TAB lists the Portlets of the Demand Management Dashboard page. *Figure 2-4* illustrates the Demand Management Dashboard page.

Table 2-1.

Portlet	Description / Link
Consolidated Demand	For more information concerning the Consolidated Demand Portlet, see *"Consolidated Demand Portlet"* on page 24.
Demand by Category	For more information concerning the Demand by Category Portlet, see *"Demand by Category Portlet"* on page 25.
SLA Exception Roll Up	For more information concerning the SLA Exception Roll Up Portlet, see *"SLA Exception Roll Up Portlet"* on page 26.
Assignment Queue	For more information concerning the Assignment Queue Portlet, see *"Assignment Queue Portlet"* on page 24.

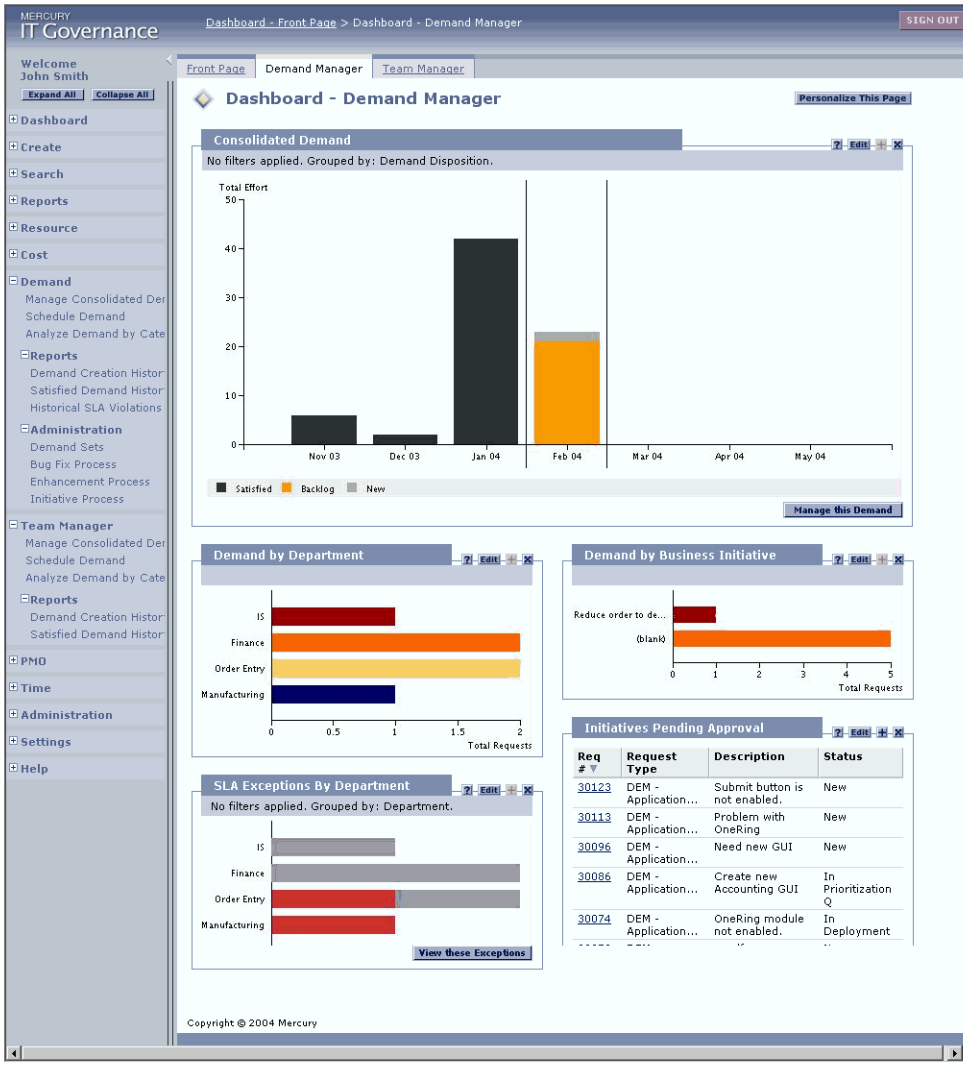


Figure 2-4 Demand Management Dashboard page

Personalization

Mercury ITG Dashboard can be personalized to show data that is relevant only to the logged-on user. Users can select which Portlets are displayed on their own Dashboard pages and filter for appropriate information in each Portlet.

Example

A CIO can select to display the Consolidated Demand Portlet, displaying a summary view of all the demand placed on his organization.

Additionally, users can add multiple pages (tabs) to their Dashboard, each one consisting of different Portlets. Mercury ITG Center recognizes your logon information and remembers which Portlets you have decided to display as well as the filtering information for each selected Portlet. Using the previous example, each time the CIO logs onto Mercury ITG Center, they will see the Consolidated Demand Portlet.

Managing Demand

Mercury ITG Center automatically consolidates the Demand for all of the Demand Types within your selected Demand Set, graphically illustrating all Demand placed on your organization. Using the standard interface, you can manage this consolidated Demand. Mercury ITG Center allows you to schedule when you will work on blocks of Demand. You can also choose to not address (reject) specific Demand.

SLA

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. SLAs are defined on the Request Type.

Templates

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

Workflow

A Workflow is a logical series of steps that defines the process a Demand Request Type follows. A Workflow can be configured to handle virtually any business practice. This allows a department to create Workflows to automate existing processes, rather than forcing users to adopt a fixed set of processes to perform their work.

Workflow steps can range in usage from functional approvals to actual system-level executions. For example, you can create an execution step to automatically connect to another application and import data into the database. *Figure 2-5* illustrates a sample workflow.

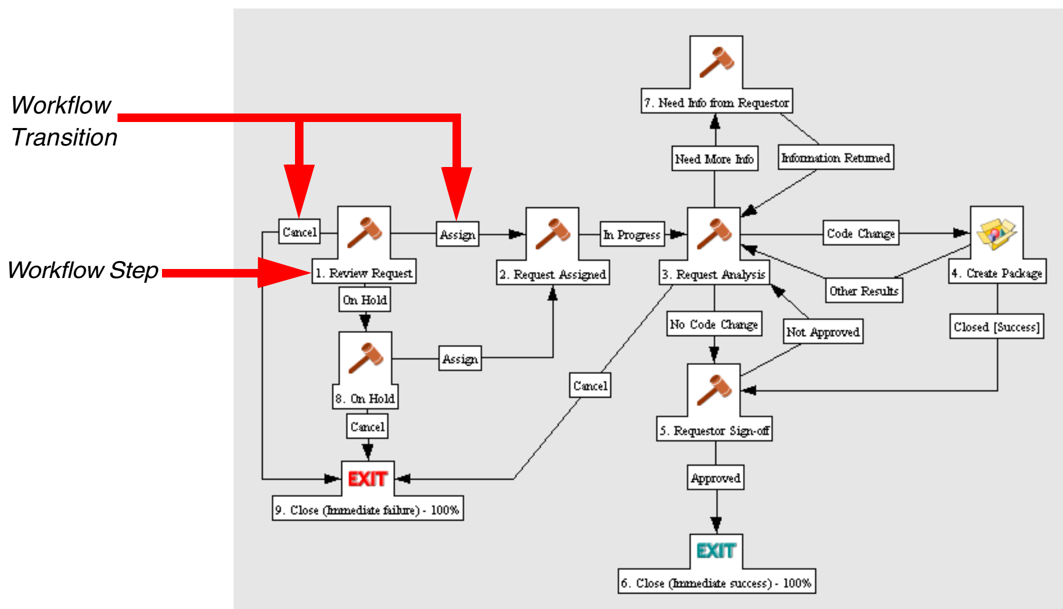


Figure 2-5 Sample Workflow

Request/Workflow Interaction

Demand Request Types are tightly integrated with a Workflow. Each Request Type has a list of possible Statuses it can take on, such as Assigned, On Hold, and New. Each Status can be linked to a particular Workflow step and can change field-level behavior. Additionally, since Request Statuses can be linked to field behavior through Status Dependencies, field properties (such as whether the field can be edited or is required) can also be altered as the Request precedes along a Workflow.

You can also configure the Workflow to execute the commands contained in the Request Type at specific points in the process (Workflow step). The Request Type commands are executed at Execution Workflow steps.

Example

A Request reaches a Workflow step that updates the Request Status to **Assigned**. At this point, the Assigned User field in the Request becomes required. This field must be filled in before the Request can continue processing.

Chapter 3

Demand Management User Interface Overview

Mercury Demand Management uses both the standard interface and the Workbench. Demand Management takes advantage of the full power of Mercury IT Governance Center, using the standard interface for processing, managing and analyzing Demand, while using the Workbench to configure Demand-related processes and infrastructure.

This chapter covers the following topics:

- *Demand Management Menus*
- *Demand Management Pages*
- *Demand Management Portlets*
- *Demand Management System Templates*

Note

See the following documents for additional information on using Mercury ITG Center interface:

- *Using the Dashboard*
- *Processing Requests (Demand Management)*

Demand Management Menus

Demand Management features two menu groups for analyzing and managing Demand. Users with a Demand Management license and appropriate Access Grants have access to the Demand Management menus.

The following is a list of the Demand Management menu groups:

- *Demand Menu*
- *Team Manager Menu*

Demand Menu

The Demand Management menu includes the Demand Management pages required to manage Demand. From the Demand menu, you can do the following:

- Manage Demand
- Schedule Demand
- Analyze Demand
- Run Demand Management reports
- Administer the Demand Management process

Figure 3-1 illustrates the Demand menu. *Table 3-1* defines the Demand menu items.

Note

These menu items might vary slightly depending on the on-site configuration during Demand Management installation.

Figure 3-1 Demand Menu

Table 3-1. Default Demand Menu

Menu Group	Menu Item	Description
Demand	Manage Consolidated Demand	Opens the Consolidated Demand page where you can analyze the Demand on your organization. You can also click on the graph to schedule a portion of the Demand. For more information, see *“Manage Consolidated Demand Page”* on page 20.
	Schedule Demand	Opens the Schedule Demand page where you can schedule when the Demand will be fulfilled. You can also select to Reject the Demand. For more information, see *“Schedule Demand Page”* on page 22.
	Analyze Demand by Category	Opens the View Demand by Category page where you can analyze the current Demand using a set of filters and display parameters. For more information, see *“Analyze Demand by Category Page”* on page 22.
Reports	Demand Creation History	Opens the DEM - Demand Creation History Report page, where you can specify filter criteria and submit the report. For more information, see *“DEM - Demand Creation History Report”* on page 70.
	Satisfied Demand History	Opens the DEM - Satisfied Demand History page, where you can specify filter criteria and submit the report. For more information, see *“DEM - Satisfied Demand History Report”* on page 71.
	Historical SLA Violations	Opens the DEM - Historical SLA Violations page, where you can specify filter criteria and submit the report. For more information, see *“DEM - Historical SLA Violations Report”* on page 72.

Table 3-1. Default Demand Menu [continued]

Menu Group	Menu Item	Description
Administration	Demand Sets	Opens the page for configuring Demand Sets in the Mercury ITG Center. This includes adding Request Types to your Demand Sets and mapping Demand Fields to Request Type fields.
	Bug Fix Process	Opens the Workflow window for the DEM - Bug Request Workflow in the Workbench. *Note: you must have a power license to access the Workbench.*
	Enhancement Process	Opens the Workflow window for the DEM - Enhancement Request Process Workflow in the Workbench. *Note: you must have a power license to access the Workbench.*
	Initiative Process	Opens the Workflow window for the DEM - Project Initiative Process Workflow in the Workbench. *Note: you must have a power license to access the Workbench.*

Note

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

Team Manager Menu

The Team Manager menu includes the Demand Management pages required to manage Demand from the perspective of someone responsible for managing a team's Demand. From the Team Manager menu, you can do the following:

- Manage Demand
- Schedule Demand
- Analyze Demand
- Run Demand Management reports

Figure 3-2 illustrates the Team Manager menu. *Table 3-2* defines the Team Manager menu items.

Figure 3-2 Team Manager Menu

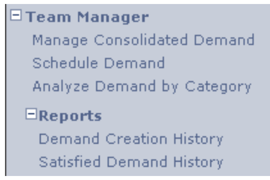


Table 3-2. Default Team Manager Menu

Menu Group	Menu Item	Description
Demand	Manage Consolidated Demand	Opens the Consolidated Demand page where you can analyze the Demand on your organization. You can also click on the graph to schedule a portion of the Demand. For more information, see *"Manage Consolidated Demand Page"* on page 20.
	Schedule Demand	Opens the Schedule Demand page where you can schedule when the Demand will be fulfilled. You can also select to Reject the Demand. For more information, see *"Schedule Demand Page"* on page 22.
	Analyze Demand by Category	Opens the View Demand by Category page where you can analyze the current Demand using a set of filters and display parameters. For more information, see *"Analyze Demand by Category Page"* on page 22.
Reports	Demand Creation History	Opens the DEM - Demand Creation History Report page, where you can specify filter criteria and submit the report. For more information, see *"DEM - Demand Creation History Report"* on page 70.
	Satisfied Demand History	Opens the DEM - Satisfied Demand History page, where you can specify filter criteria and submit the report. *"DEM - Satisfied Demand History Report"* on page 71.

Demand Management Pages

The Demand Management pages are where Demand can be managed, scheduled and analyzed. These pages can be accessed from the Demand Management menus and by some of the Demand Management Portlets.

The following is a list of the Demand Management pages:

- *Manage Consolidated Demand Page*
- *Schedule Demand Page*
- *Analyze Demand by Category Page*

Manage Consolidated Demand Page

The Manage Consolidated Demand page provides a graphical view of the Demand in terms of effort. Click on the different elements of the graph to schedule that Demand element. You can also use this page to graphically analyze your Demand. Simply select the Demand Set, desired filters, a time-frame, and specify a grouping. To open this page, click **Demand > Manage Consolidated Demand**. You can enter filter criteria to graphically display a smaller, more focused, number of items. You can also specify the Group By, which updates the graph with the appropriate Demand Category presentation. *Figure 3-3* illustrates the Manage Consolidated Demand page.

Figure 3-3 Manage Consolidated Demand page

> **Note**
>
> Changes to the Manage Consolidate Demand page are not exported to the Consolidated Demand Portlet.

Schedule Demand Page

The Schedule Demand page is used to schedule or reject Demand. This page can be accessed by clicking the graph on the Manage Consolidated Demand page, or by selecting **Demand > Schedule Demand**. You can enter filter criteria to graphically display a smaller, more focused, number of items. You can also specify the Group By, which updates the graph with the appropriate Demand Category presentation. *Figure 3-4* shows the Schedule Demand page.

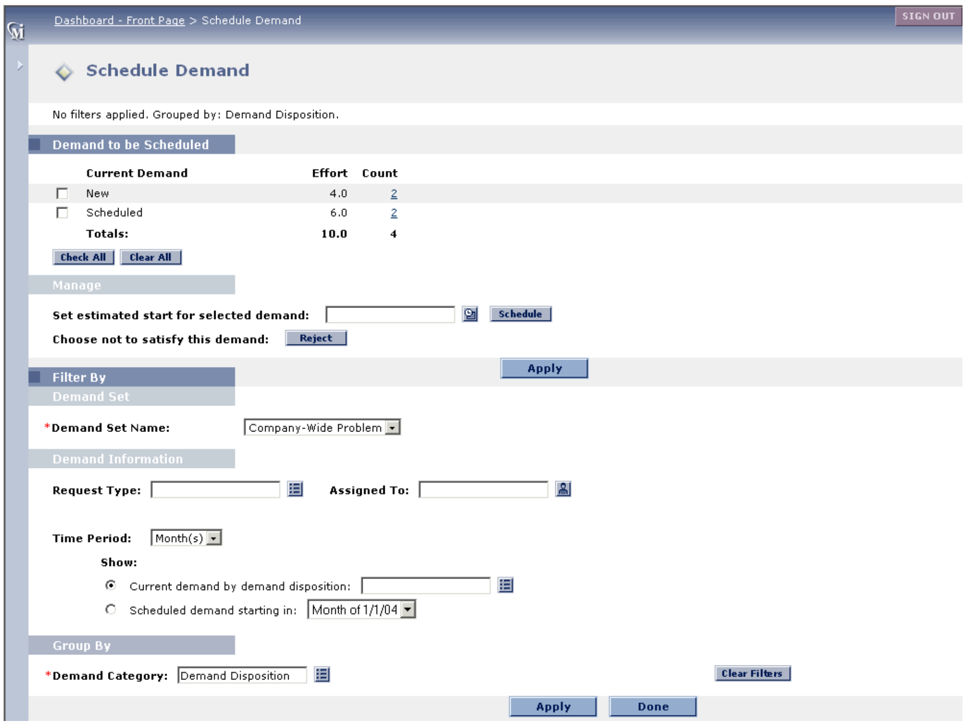


Figure 3-4 Schedule Demand page

Analyze Demand by Category Page

The Analyze Demand by Category page provides a graphical view of the Demand in terms of the number of Requests. This page can be accessed by selecting **Demand > Analyze Demand by Category**. You can select to view the Demand associated with an alternate Demand Set by selecting another set from the Demand Set field. You can then enter filter criteria to graphically display a smaller, more focused, number of items. You can also specify the Group By, which updates the graph with the appropriate Demand Category presentation. *Figure 3-5* illustrates the Analyze Demand by Category page.

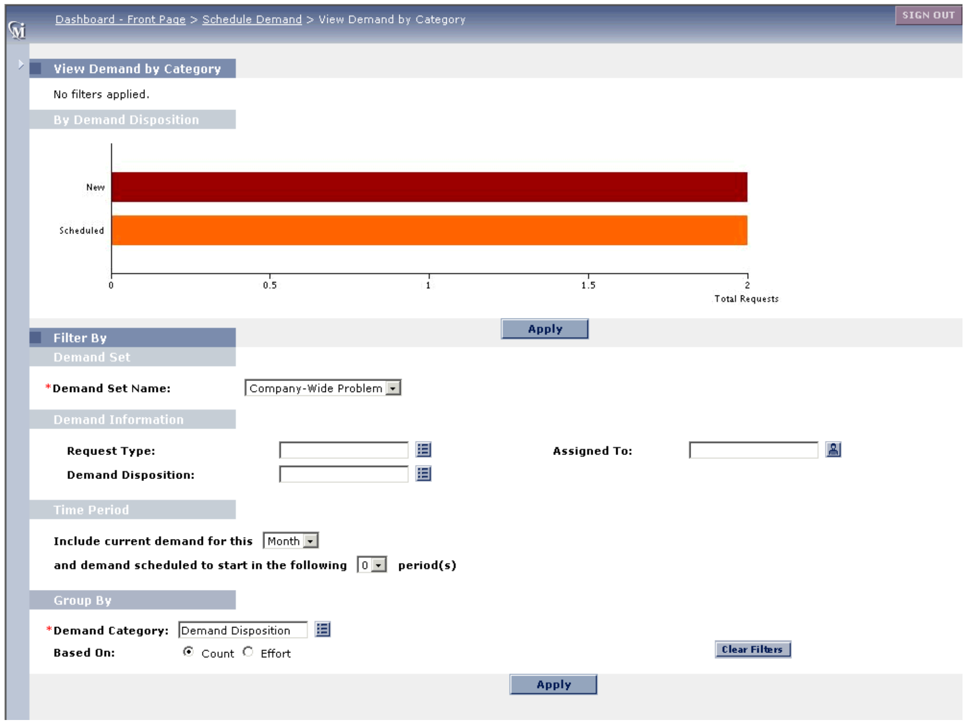


Figure 3-5 View Demand By Category page

Demand Management Portlets

Demand Management includes a number of specialized Portlets available to your Dashboard. The following Portlets can be added to any existing or new Dashboard page:

- *Assignment Queue Portlet*
- *Consolidated Demand Portlet*
- *Demand by Category Portlet*
- *Demand List Portlet*
- *SLA Exception Roll Up Portlet*

Assignment Queue Portlet

The Assignment Queue Portlet provides a personalized view into the Demand including the assigned Resource to each Demand. Demand without an assigned Resource are displayed with a empty Assign field.

You can then use this Portlet to assign or re-assign a user as a resource to the Request. *Figure 3-6* shows the Assignment Queue Portlet. For information on how to configure and view Demand using the Assignment Queue Portlet, see *"Viewing Assignments"* on page 46. For information on how to assign a user to a Demand, see *"Assigning Demand"* on page 58.

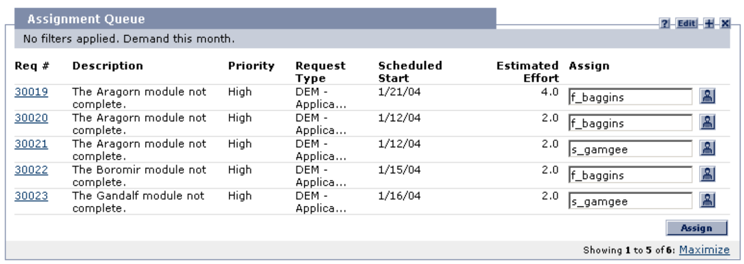


Figure 3-6 Assignment Queue Portlet

Consolidated Demand Portlet

The Consolidated Demand Portlet provides a graphical overview of the Demand placed on an organization. Click the **Manage this Demand** button to access the *"Manage Consolidated Demand Page"* on page 20 where you can alter the data graphically and access the scheduling functionality. *Figure 3-7* illustrates the Consolidated Demand Portlet. For information on how to configure and view Demand using the Consolidated Demand Portlet, see *"Viewing Consolidated Demand"* on page 47.

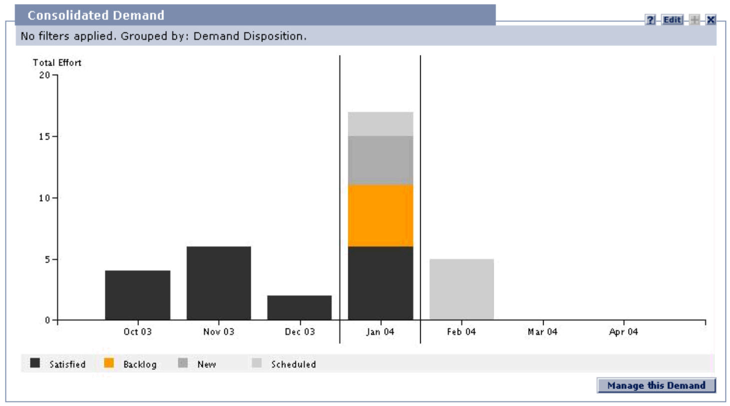


Figure 3-7 Consolidated Demand Portlet

Demand by Category Portlet

The Demand by Category Portlet provides a quick view into different areas of Demand. This Portlet provides a quick, graphical view of the Demand summary organized a specified category, such as Department, Demand Type or Priority. You can also select whether the Portlet displays the grouped information based on number of Demand entries within a specific grouping (Count) or the consolidated effort of the grouped Demand. *Figure 3-8* shows the Demand by Category Portlet. For information on how to configure and view the Demand by Category Portlet, see *"Viewing Demand by Category"* on page 50.

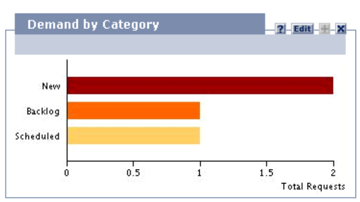


Figure 3-8 Demand by Category Portlet

Demand List Portlet

The Demand List Portlet provides a personalized list of the Demand placed on an organization or individual. The Demand List Portlet can be personalized to display Demand filtered based on specified criteria (Demand Type, Priority, Demand Disposition, etc.) You can also specify how the Demand is grouped and which columns should be included in the Portlet's display. *Figure 3-9* shows the Demand List Portlet. For information on how to configure and view the Demand List Portlet, see *"Viewing Lists of Demand"* on page 48.

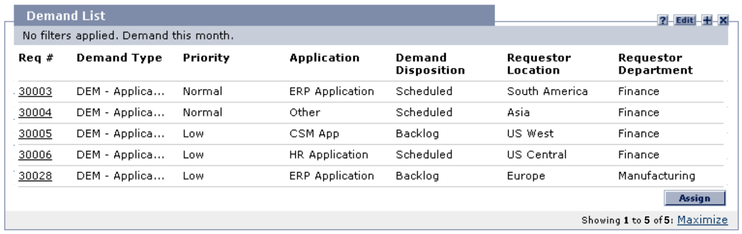


Figure 3-9 Demand List Portlet

SLA Exception Roll Up Portlet

The SLA Exception Roll Up Portlet lists the open Requests that have triggered SLA exceptions. The SLAs are configured using Request Type rules. The Portlet displays the active SLAs related to your Demand, highlighting the violations in red. Click the **View These Exceptions** button to see a list of the violating Requests.

The SLA information can be grouped according to your personalized needs, such as Department, Application and Demand Type. *Figure 3-10* shows the Demand List Portlet. For information on how to configure and view the Demand List Portlet, see *"Viewing SLAs"* on page 52.

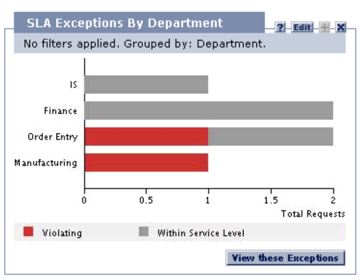


Figure 3-10 SLA Exceptions By Department Portlet

Note

Run the Historical SLA Violations report to view a historical account of all SLA exceptions.

Demand Management System Templates

Demand Management is shipped with pre-configured Dashboard templates. Each template consists of a Dashboard page that includes a number of Demand Management and Demand-related Portlets. The following is a list of the Demand Management Dashboard templates:

- *Demand Manager Template*
- *Team Manager Template*

Demand Manager Template

The Demand Manager template provides an overview of the Demand placed on an entire organization. This template includes a number of Portlets that provide an overview of the various Demand activities in your organization. *Figure 3-11* illustrates the Demand Manager Dashboard page. The following is a list of the Portlets included on the Demand Manager template:

- Consolidate Demand Portlet
  The Consolidated Demand Portlet provides a graphical overview of the Demand placed on your organization. For more information, see *"Consolidated Demand Portlet"* on page 24.

- 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 Demand, such as organizing the display of Demand by Department. For more information, see *"Demand by Category Portlet"* on page 25.

- 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 Demand, such as organizing the display of the Demand by Business Initiative. For more information, see *"Demand by Category Portlet"* on page 25.

- SLA Exceptions by Department 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 26.

- 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 Requests, such as their description and status.

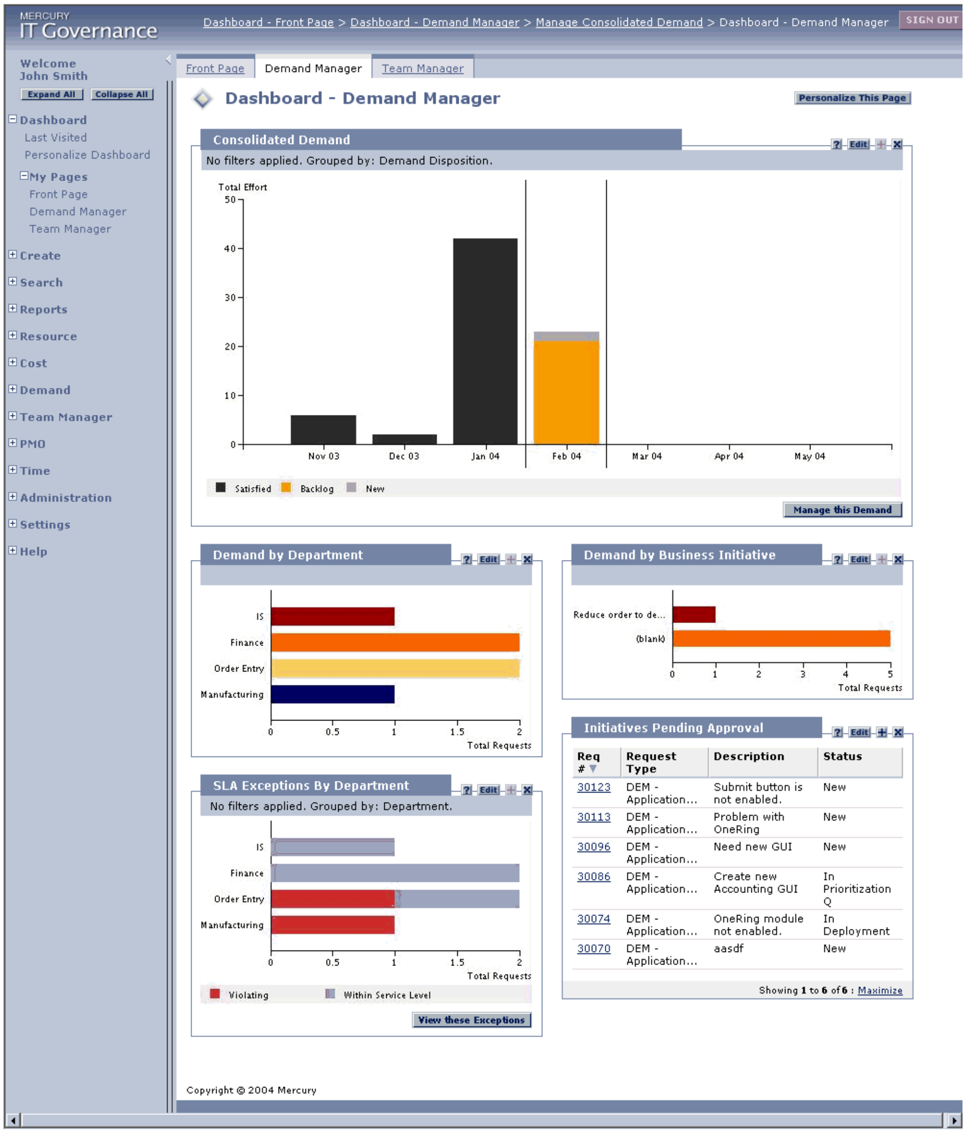


Figure 3-11 Demand Manager Dashboard page

Team Manager Template

The Team Manager template includes personalized Portlets that display Demand information of interest to someone responsible for managing a team's Demand. *Figure 3-12* illustrates the Team Manager Dashboard page. The following is a list of the Portlets on the Team Manager templates:

- 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 the Demand that has not been assigned to a resource. For more information, see *"Assignment Queue Portlet"* on page 24.

- 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 Demand, such as organizing the display of the Demand by Priority. For more information, see *"Demand by Category Portlet"* on page 25.

- Team SLA Exceptions by Department Portlet
  The Team SLA Exceptions by Department Portlet is a personalized version of the SLA Exceptions by Department 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 26.

- 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 description and the status of the Demand in the Workflow.

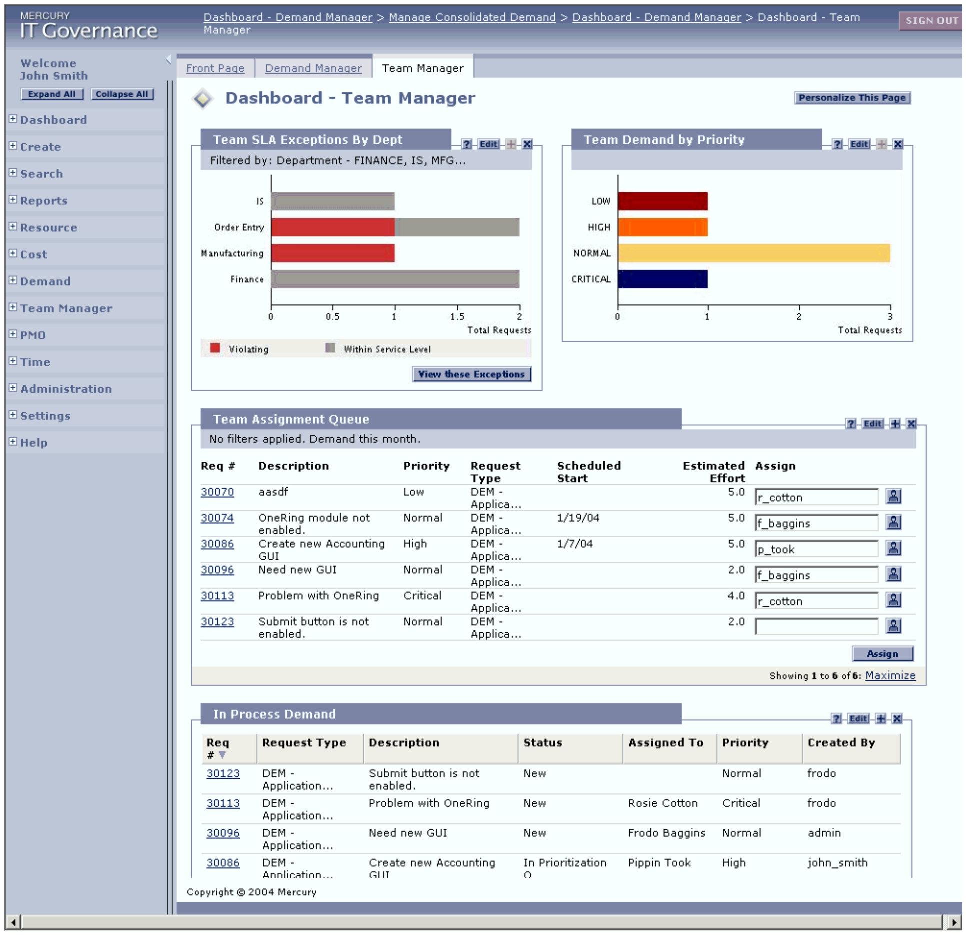


Figure 3-12 Team Manager Dashboard page

Chapter 4

Setting Up Demand Management

Mercury Demand Management users primarily operate in the standard interface, capturing, managing and reporting on their organizational Demand. To perform these tasks, users need the menus, Dashboard templates and Portlets of Demand Management.

This chapter covers the following topics:

- *Enabling the Demand Management Menus*
- *Importing a Demand Management Template*
- *Adding a Portlet to a Dashboard Page*

Enabling the Demand Management Menus

Demand Management users operate in the standard interface using Demand Management menus and Portlets. Enabling the Demand Management menus requires the correct Access Grants and Security Group permissions. *Figure 4-1* illustrates the Demand Management menus.

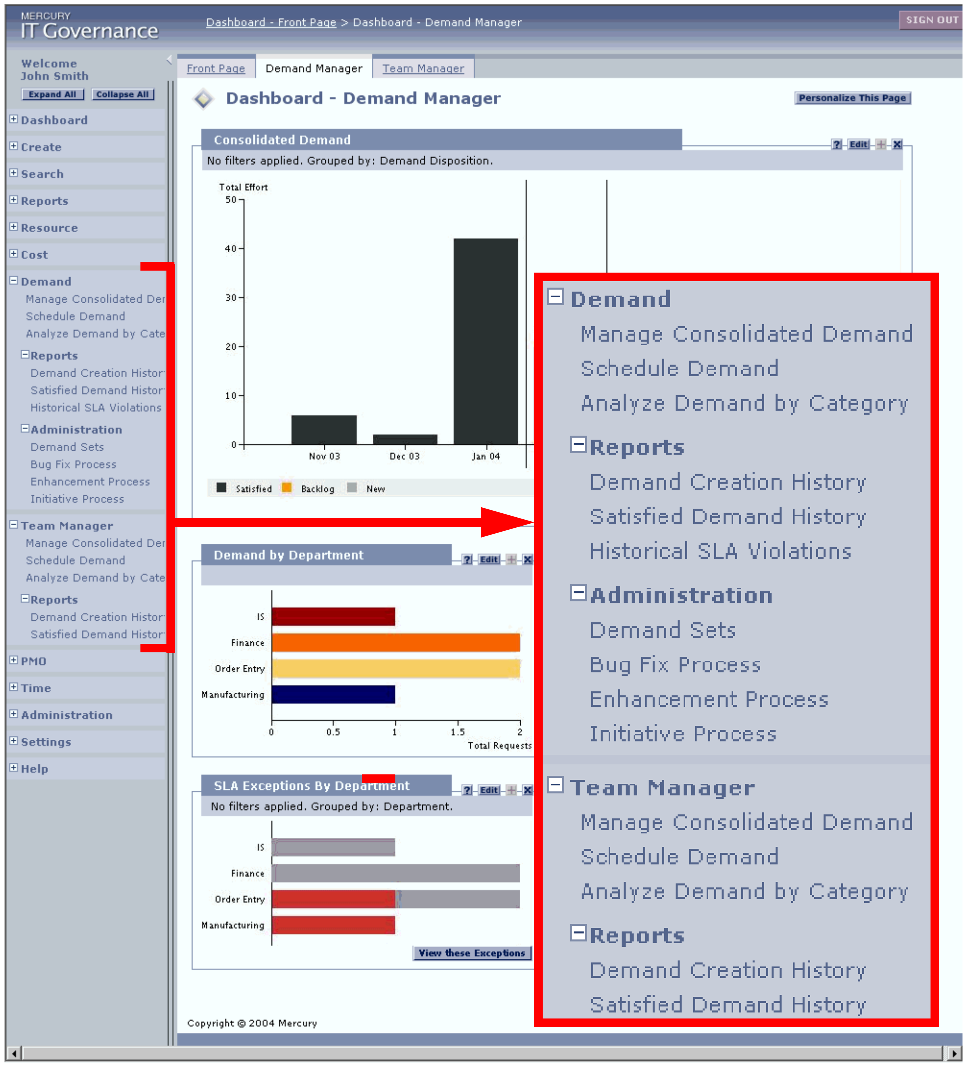


Figure 4-1 Demand Management Menus

Note If the Demand Management menus are not visible, contact your application administrator to obtain the correct Access Grants.

Importing a Demand Management Template

Pre-configured Demand Management templates can be imported onto your Dashboard. Templates consist of one or more Dashboard pages, each with a set of default Portlets. Once imported, templates appear as a new page on the Dashboard.

The following is a list of the Demand Management templates:

- Demand Manager
  For information regarding the Demand Manager template, see *"Demand Manager Template"* on page 27.

- Team Manager
  For information regarding the Team Manager template, see *"Team Manager Template"* on page 28

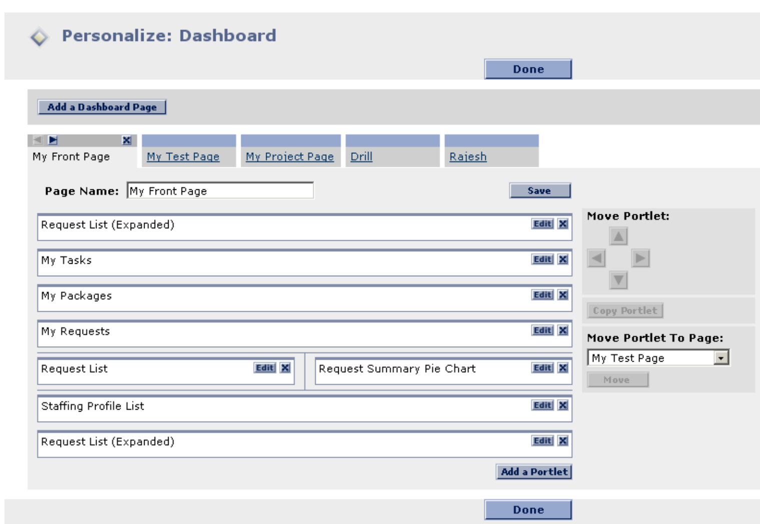
The following procedure details how to import the Demand Manager Dashboard template.

To import a Demand Manager template:

1. Logon to the Dashboard.

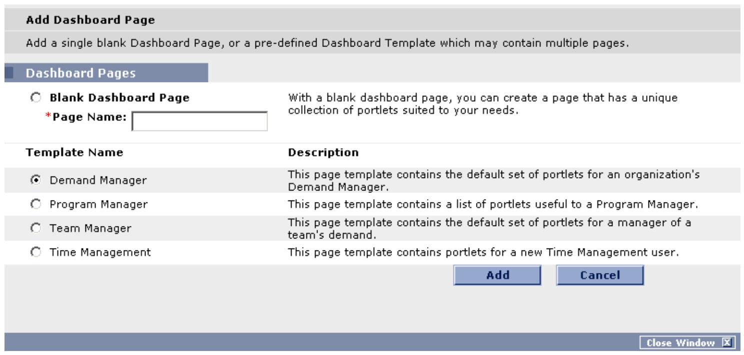
2. Click **Personalize This Page**.

   The Personalize page opens.



3. Click **Add a Dashboard Page**.

The Add Dashboard Page opens.



4. Select **Demand Manager**.

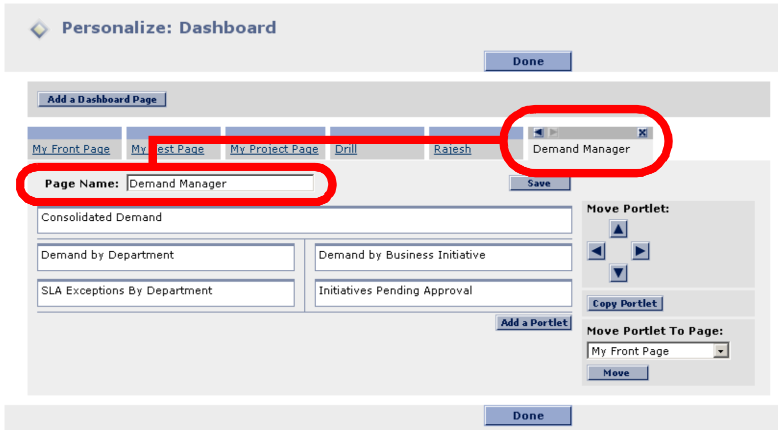
> **Note:** Contact your application administrator if the Demand Manager or Team Manager templates is not listed.

5. Click **Add**.

   The Demand Manager page is added to the Personalize page.

6. Edit the look of the tab.

   - Click the enabled left arrow button above the tab to move the tab to the left.
   - Click the **X** button to delete the template.
   - In the Page Name field, change the name of the tab.
   - Alter the positioning of Portlets using the Move Portlet directional arrows.



7. Click **Done**.

The Demand Manager template is added to the Dashboard.

Adding a Portlet to a Dashboard Page

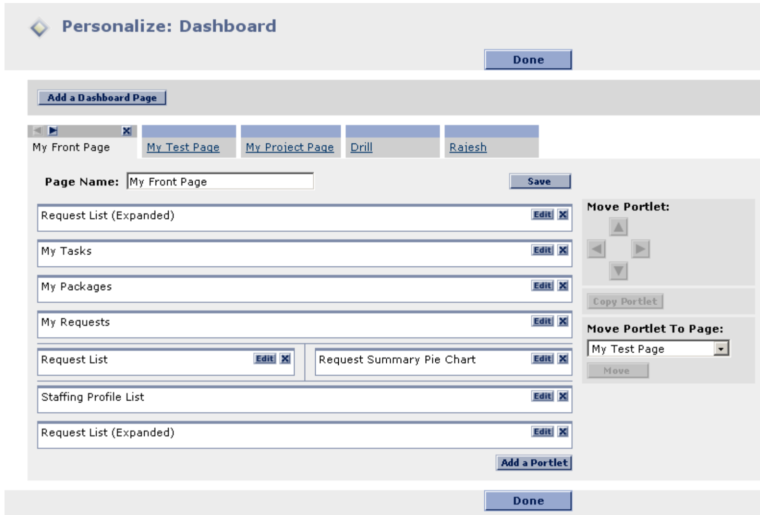
Not all Demand Management Portlets are included on a Demand Management Dashboard template. Additionally, you might want to add the same Portlet multiple times, each personalized differently. This section details how to add a Portlet to a Dashboard Page.

To add a Portlet to a Dashboard page:

1. Logon to the Dashboard.

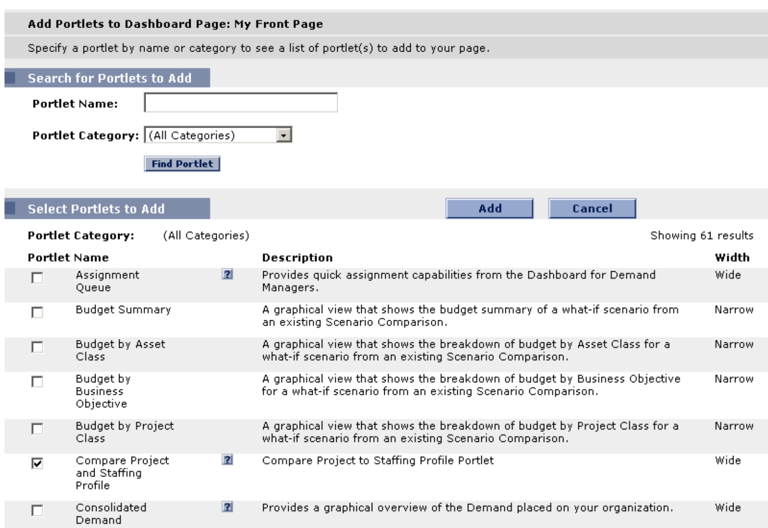
2. Click **Personalize This Page**.

   The Personalize page opens.



3. Click **Add a Portlet**.

   The Add Portlet page opens.



4. In Portlet Name, enter some or all of the Portlet's name.

5. Click **Find Portlet**.

   A list of Portlets matching the search criteria is returned.

6. Select a Portlet to be added to the Dashboard page.

Portlets listed with a **Help** icon ( ) include a Portlet Help page. Portlet Help pages provide an explanation of the Portlet. Click the **Help** icon to open the Portlet's Help page.

7. Click **Add**.

   The Portlet is added to the Dashboard page.

8. Personalize the Portlet.

9. Click **Done**.

   The new Portlet is added to the selected Dashboard page.

Note

For complete instruction on how to add a Portlet to a Dashboard page, see *Using the Dashboard*.

Chapter
5

Creating Demand

Mercury Demand Management users create Demand by submitting Demand Management Requests.

This chapter covers the following topics:

- *Demand Management Requests*
- *Creating Demand*

Demand Management Requests

Demand Management Requests are Mercury IT Governance Center Request Types specifically configured for Demand Management. The following is a list of the system Demand Management Request Types:

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

For information concerning the Demand Management Requests, see *"Demand Management Request Types and Workflows"* on page 75.

Creating Demand

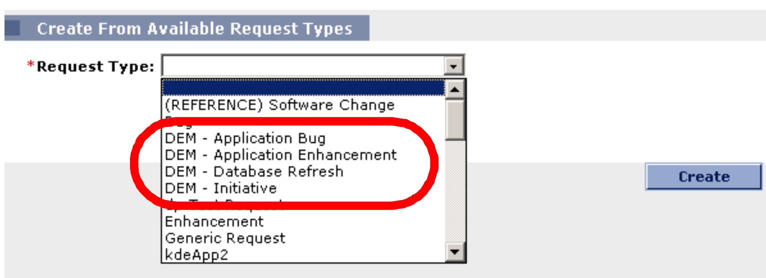
Users create Demand by submitting a Demand Management Request. Newly created Demand then proceeds through the resolution process defined by the associated Workflow.

Note

For complete instruction on how to create a new Request, see Processing Requests (Demand Management).

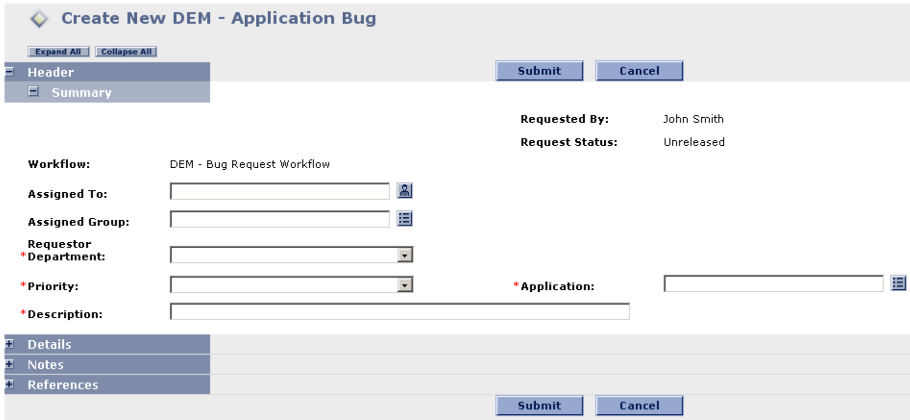
To create Demand:

1. Logon to Mercury Demand Management.
2. From the menu, select **Create > Request**.
3. From the Request Type pull-down menu, select the type of Demand to create.



4. Click **Create**.

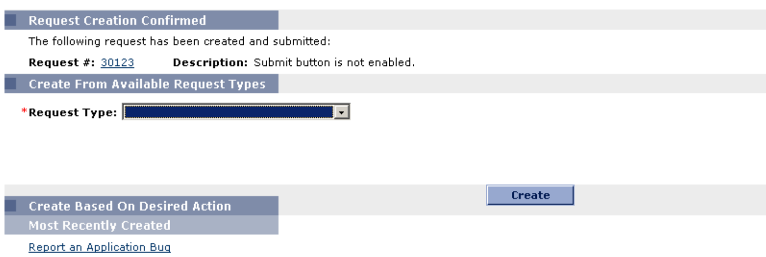
   The Create New Request page opens.



5. Complete all required fields and any additional fields.

6. Click **Submit**.

   The Demand is submitted and the Request Creation Confirmed page is returned.



Requests that have been configured to be tracked as Demand now appear in Demand Management Portlets, reports and analysis tools.

Chapter
6
Viewing Demand

Mercury Demand Management users primarily operate in the standard interface, capturing, managing and reporting on their organizational Demand. Mercury IT Governance Center power users can also be involved in managing the Demand processes using the Workbench.

This chapter covers the following topics:

Personalizing Portlets to View Demand

Portlets can be used to view Demand. Each Portlet can be personalized to obtain different views of the Demand. Additionally, the same Portlet can be copied and personalized to obtain two different views of the same Demand. For example, an IT manager might want to view Low and Normal Priority Demand in one Portlet and High and Critical Priority Demand in the other (see *Figure 6-1*).

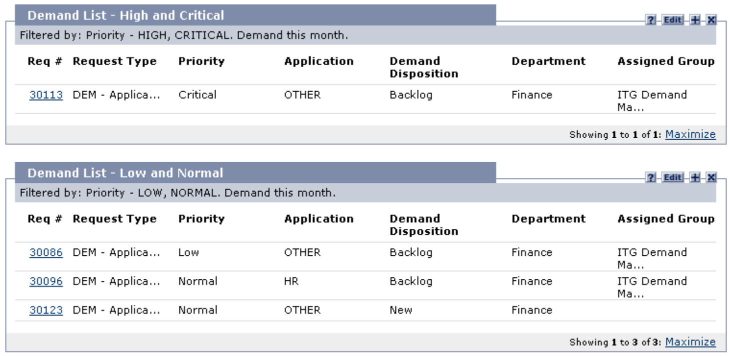
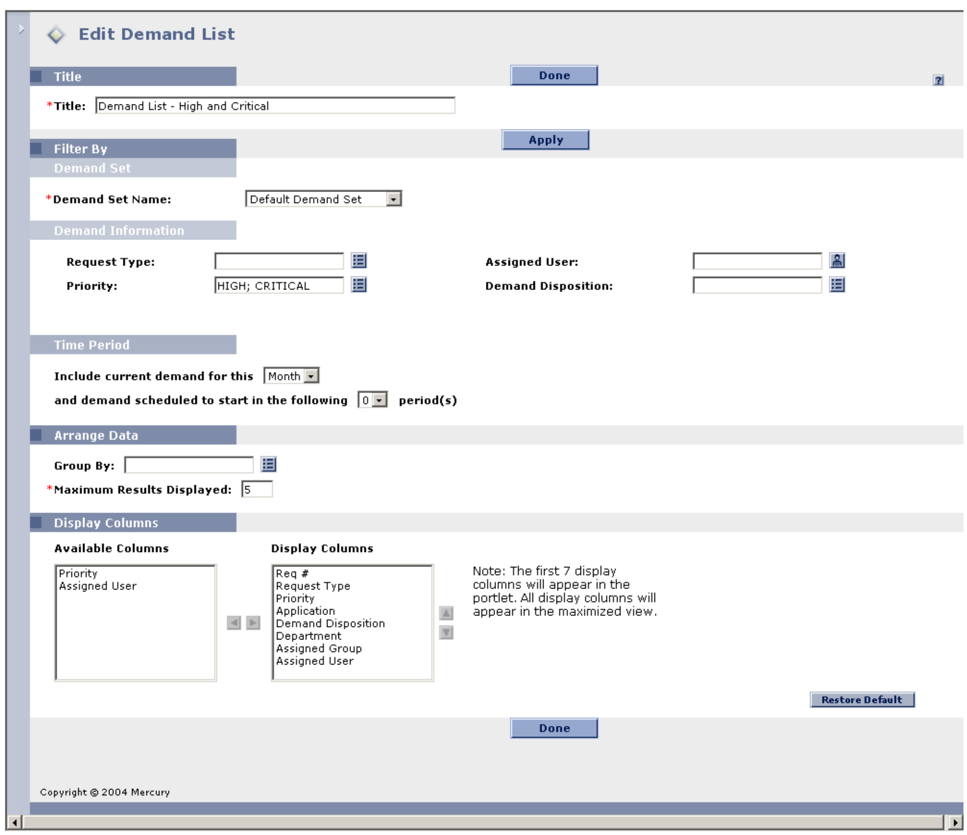


Figure 6-1 Demand List Portlet

To personalize a Portlet:

1. On the Portlet, click **Edit** (Edit).

   The **Edit** button is located in the top right corner of the Portlet. The Portlet's Edit page opens.



Note

Published Portlets are Portlets distributed by the application administrator or a user with the correct Access Grants. Published Portlets cannot be edited. For information concerning published Portlets, see *Using the Dashboard*.

The fields in the Filter By section are different for different Portlets.

2. In the Title field, enter a new name for the Portlet.

   The Title field can be edited to display a more useful title, such as Demand List - High and Critical.

3. In the Filter By section, select what information to display.

   The Filter By section selects the Portlet's search criteria. Red asterisks (*) appear next to required fields.

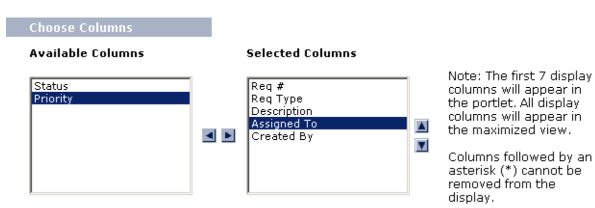
4. In the Arrange Data section, select how to display the information.

   The Arrange Data section arranges and sorts the returned values of the search. This section sets which column to sort by, whether to list the returned values in ascending or descending order, the number of entities to list in the Portlet.

Note

Additional returned values are accessible by clicking the **Maximize** button at the bottom of the Portlet.

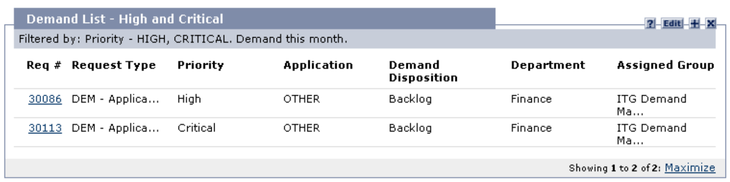
Depending on the Portlet, subsections can appear under the Arrange Data section, such as Choose Columns. Columns are highlighted in the Available Columns field and moved to the Selected Columns field using the side to side arrows. Additionally, highlighted columns in the Selected Columns field can be moved up and down using the up and down arrows.



> **Note:** Some Portlet Edit pages do not have the Choose Columns section.

5. On the Portlet’s Edit page, click **Done**.

   The Portlet displays the newly personalized information.



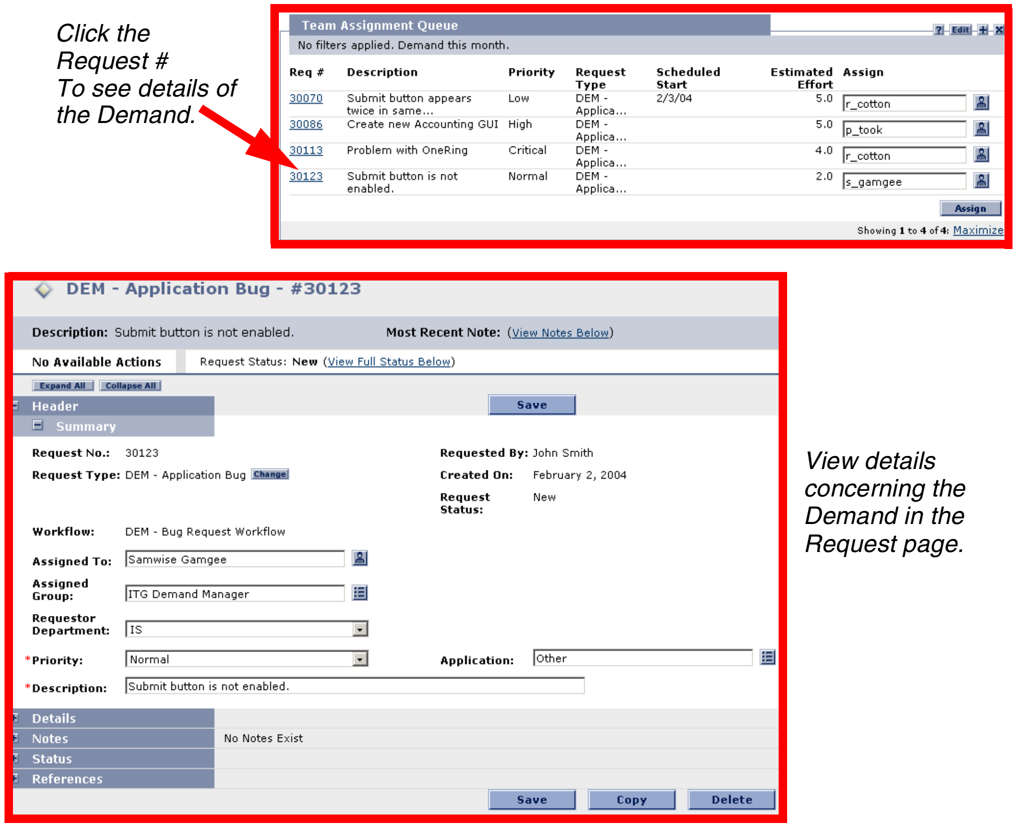
Viewing Assignments

The Team Assignment Queue Portlet displays Demand data in a column and row format. From this Portlet, you can view and assign a user to the Demand. For more information concerning assigning users to a Demand, see *“Assigning Demand”* on page 58.

In addition to the data displayed in the Portlet and assigning users to the Demand, you can drill-down to the Demand’s Request page by clicking the linked Request number (see *Figure 6-2*).

This Portlet can be personalized to display different views of Demand related data. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters. See *“Personalizing Portlets to View Demand”* on page 43 for information on how to personalize a Portlet.

Click the Request # To see details of the Demand.



View details concerning the Demand in the Request page.

Figure 6-2 Viewing Demand from the Team Assignment Queue Portlet

Viewing Consolidated Demand

The Consolidated Demand Portlet on the Demand Manager page displays Demand disposition data in a bar chart format. Placing the cursor over a bar opens a tooltip window, listing more precise information concerning the Demand data (see *Figure 6-3*). Clicking **Manage this Demand** opens the Manage This Demand page. For more information concerning the Manage This Demand page, see *"Managing Demand"* on page 60.

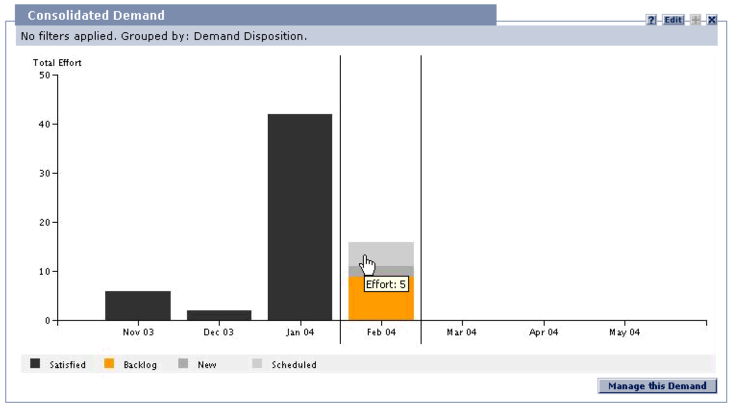


Figure 6-3 Consolidated Demand Portlet

The Consolidated Demand Portlet can be configured to display a wide range of Demand related data, including displaying Demand by assigned user and Demand by department. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters. See *"Personalizing Portlets to View Demand"* on page 43 for information on how to personalize a Portlet.

Viewing Lists of Demand

The following Portlets are used to view lists of Demand:

- Demand List Portlet
  The Demand List Portlet does not appear on either the Demand Manager or Team Manager page. The Demand List Portlet must be added to a Dashboard page.

- Request List (Expanded) Portlet
  The Request List (Expanded) Portlet is personalized as the In Process Demand Portlet on the Team Manager page.

- Request List Portlet
  The Request List Portlet is personalized as the Initiatives Pending Approval Portlet on the Demand Manager page.

These Portlets display Demand related data in a column and row format. Column headings with the sort icon ( ) indicate the data is sorted by that column. When the sort icon points down ( ), the data is sorted in alphanumeric order from first to last. When the sort icon points up ( ), the data is sorted in alphanumeric order from last to first. *Figure 6-4* illustrates the In Process Demand Portlet sorted by the Request # column from highest to lowest Request number.

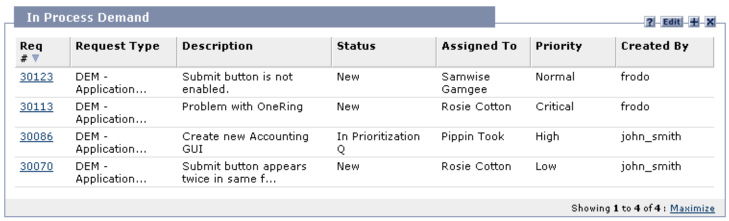


Figure 6-4 In Process Demand Portlet

In addition to the data displayed in the Portlet, you can drill-down to the Demand's Detail page by clicking the linked Request number (see *Figure 6-5*).

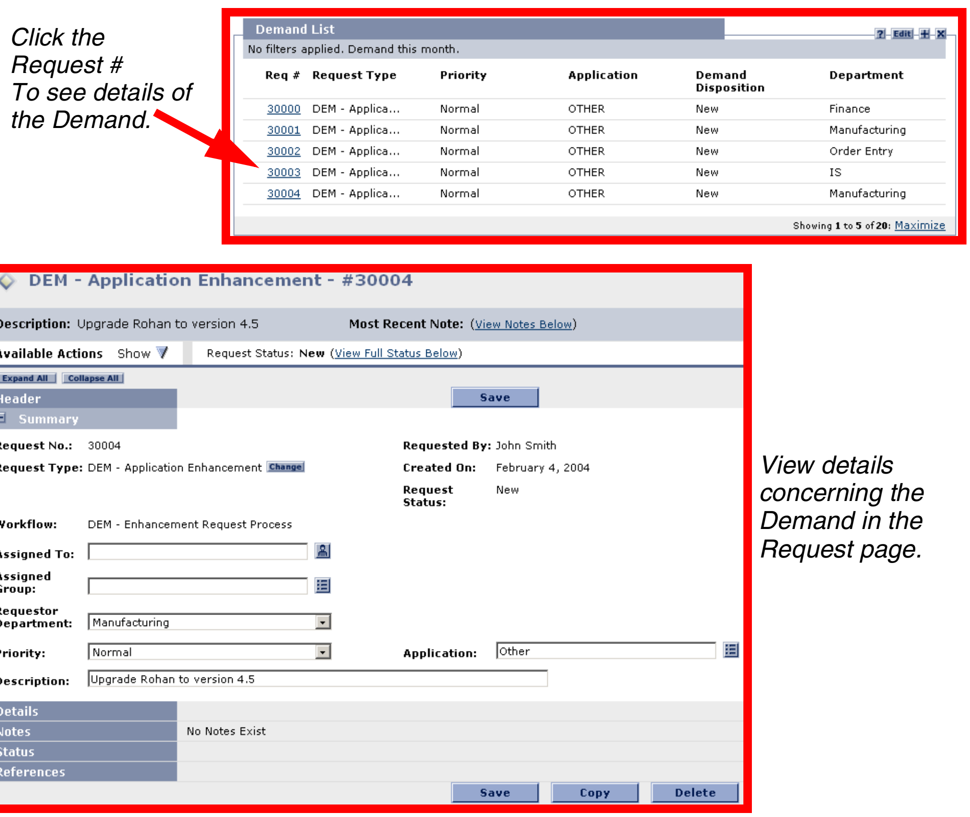


Figure 6-5 Viewing Demand from the Demand List Portlet

These Portlets can be personalized to display a wide range of Demand related data. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters. See *"Personalizing Portlets to View Demand"* on page 43 for information on how to personalize a Portlet.

Viewing Demand by Category

The Demand by Category Portlet is personalized to view Demand data as the Demand by Disposition and Demand by Business Initiative Portlets on the Demand Manager page and the Team Demand by Priority Portlet on the Team Manager page.

These Portlets display Demand data in a bar chart format. Placing the cursor over a bar opens a tooltip window, listing more precise information concerning the Demand data (see *Figure 6-6*).

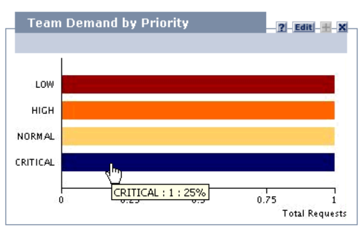


Figure 6-6 Team Demand by Priority Portlet

The Demand by Category Portlet can be configured to display a wide range of Demand related data (see *Figure 6-7*). The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters. See *"Personalizing Portlets to View Demand"* on page 43 for information on how to personalize a Portlet.

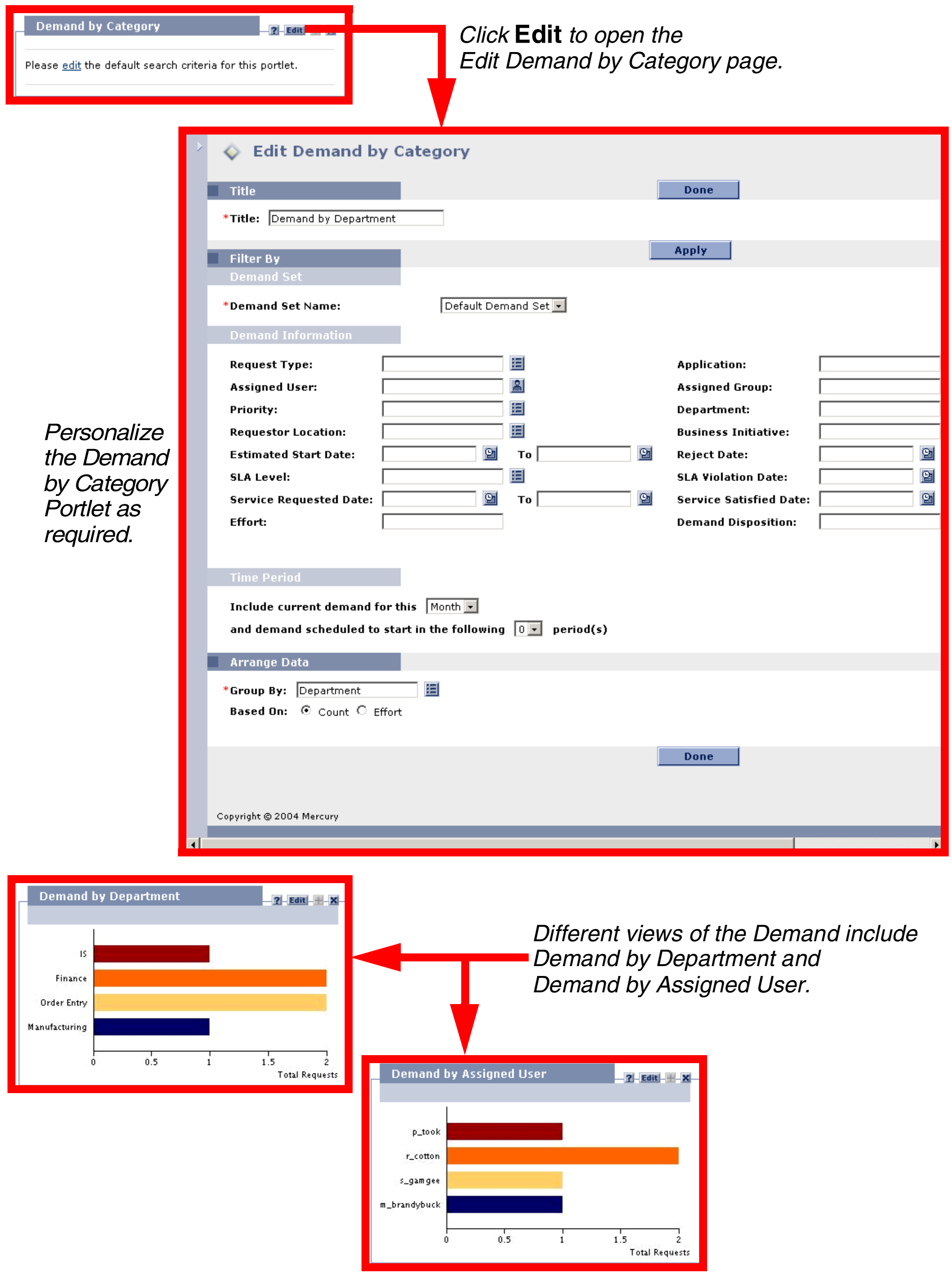


Figure 6-7 Personalizing the Demand by Category Portlet

Viewing SLAs

The SLA Exception Roll Up Portlet is personalized to view Demand data as the SLA Exceptions By Department Portlet on the Demand Manager page and the Team SLA Exceptions By Department Portlet on the Team Manager page.

These Portlets display SLA data in a bar chart format. Placing the cursor over a bar opens a Tooltip window, listing more precise information concerning the SLA data. Additionally, clicking the **View these Exceptions** button opens the SLA Exceptions page (see *Figure 6-8*).

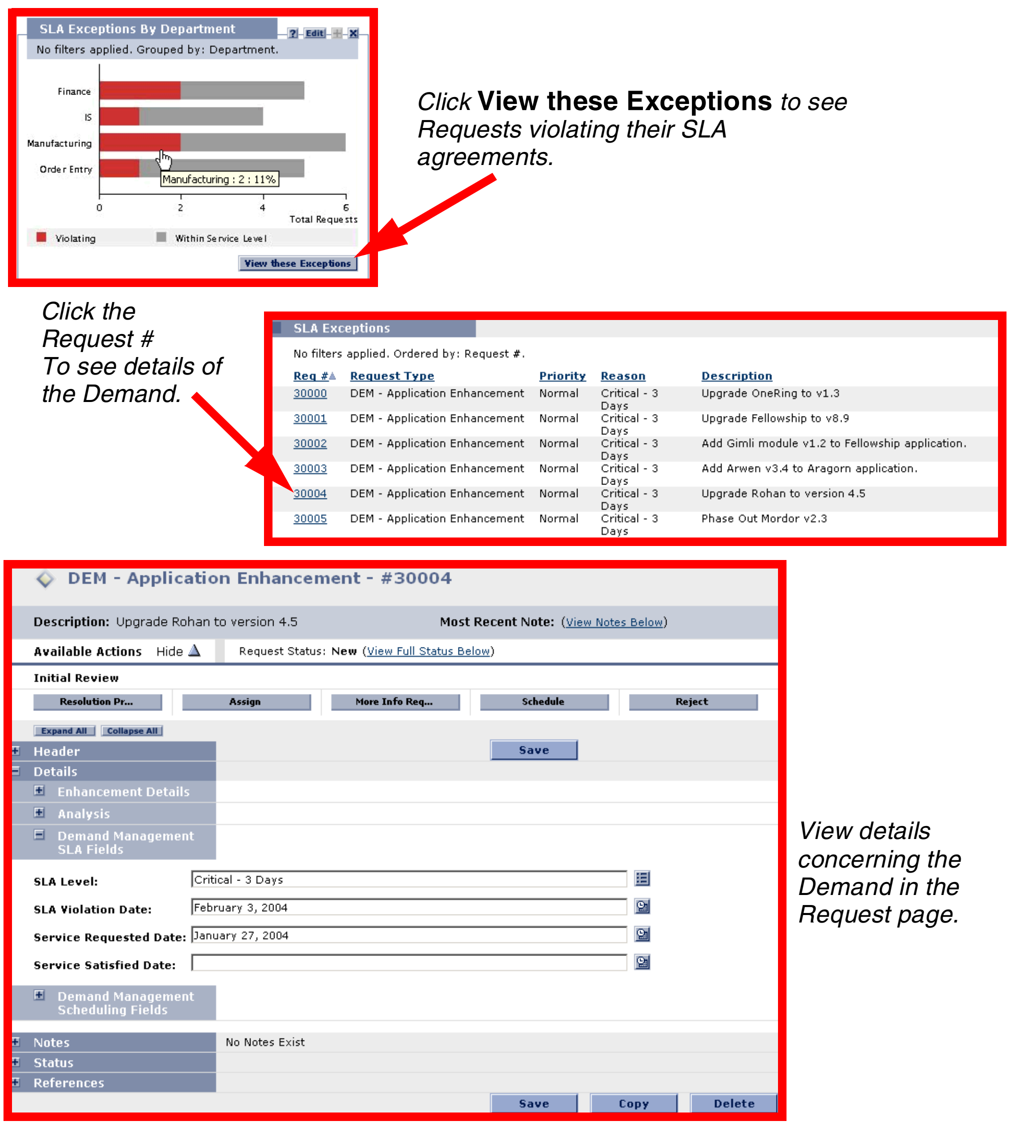


Figure 6-8 Viewing SLAs from the SLA Exception Roll Up Portlet

The SLA Exception Roll Up Portlet can be personalized to display a wide range of SLA related data. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters. See *"Personalizing Portlets to View Demand"* on page 43 for information on how to personalize a Portlet.

Chapter 7 Processing Demand

Mercury Demand Management users primarily operate in the standard interface, capturing, managing and reporting on their organizational Demand. Mercury IT Governance Center power users can also be involved in managing the Demand processes using the Workbench.

This chapter covers the following topics:

- *Analyzing Demand*
- *Assigning Demand*
- *Managing Demand*
- *Rejecting Demand*
- *Scheduling Demand*

Analyzing Demand

The View Demand by Category page provides a graphical view of Demand in terms of the number of Demand Requests. Placing the cursor over a section of the bar opens a tooltip window, listing more precise information concerning the Demand data (see *Figure 7-3*).

The View Demand by Category page can be configured to display a range of Demand related data, including displaying Demand by assigned user and Demand by department. The displayed information can be filtered using the Filter By parameters.

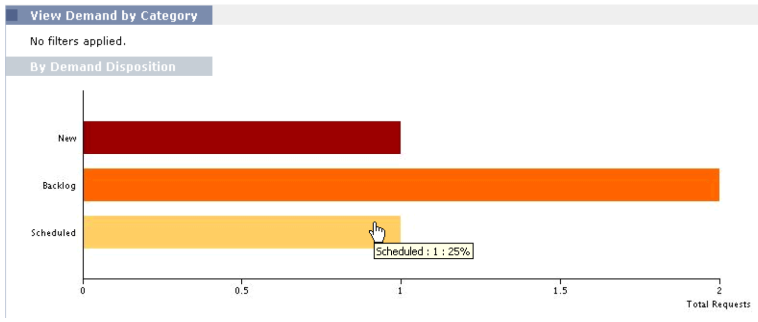
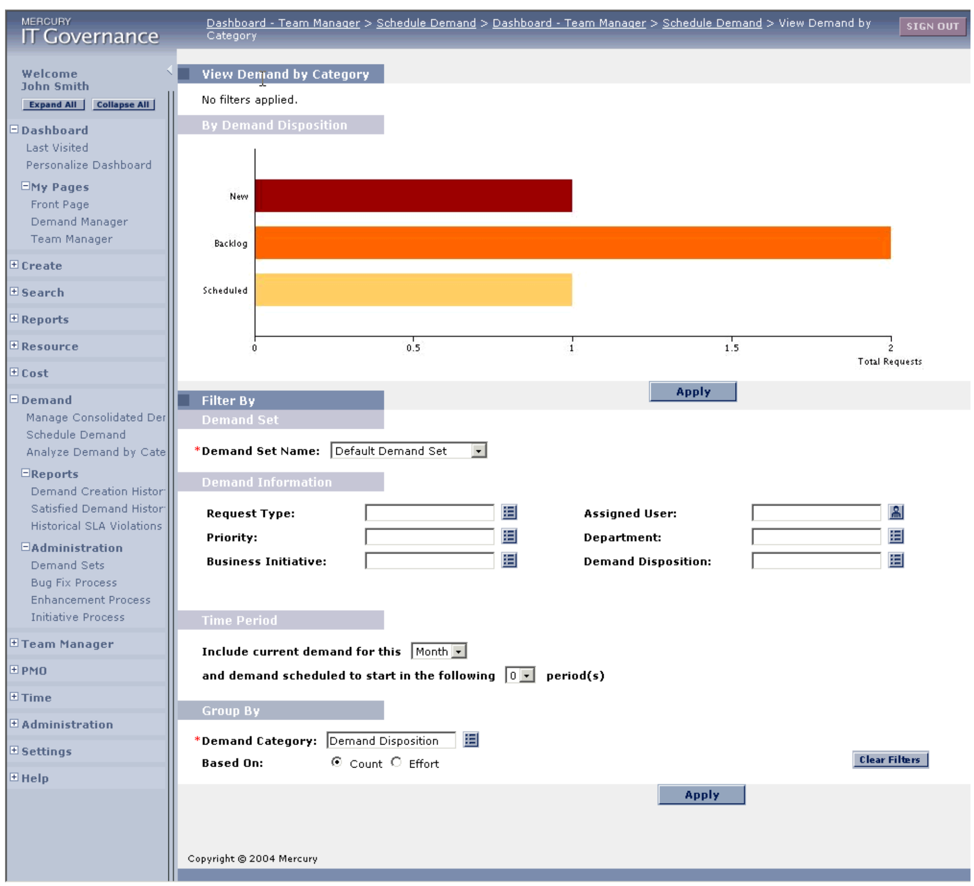


Figure 7-1 View Demand by Category page

To analyze Demand:

1. From the menu, click **Demand > Analyze Demand by Category.**



2. In the Filter By section, specify the desired data filters.

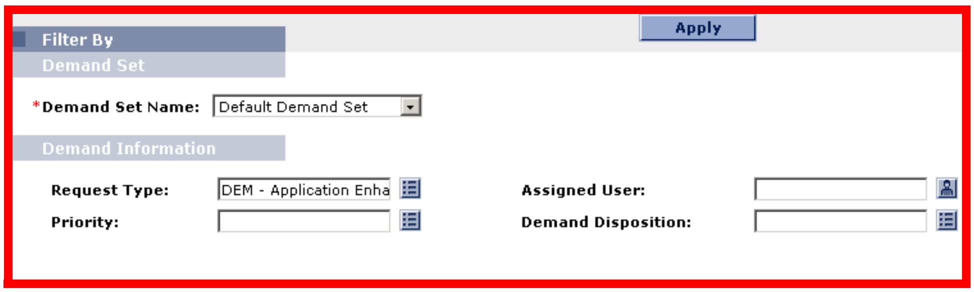
The data filters determine what Demand data is displayed and how the displayed Demand data is organized.

a. In the Demand Set section, select the Demand Set to be displayed.

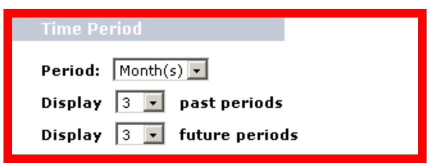
b. In the Demand Information section, select what Demand data to capture.

Note

The fields of the Demand Information section are determined by the configuration of the Demand Set.

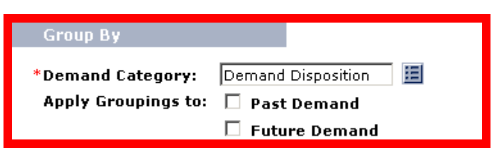


c. In the Time Period section, select the timeframe you want to analyze.



d. From the Group By drop down list, select how to organize the displayed Demand data.

For example, selecting **Demand Disposition** lists Demand by its current condition, such as Backlog, New and Scheduled. Selecting **Priority** lists Demand by priority, such as Critical, High, Normal and Low.



3. Click **Apply**.

The graphic at the top of the page is updated with the applied filters and display information. You can change the filter and grouping parameters to view the Demand in different ways.

> **Note:** On the Manage Consolidated Demand page, Demand is always presented in terms of the number of Demand Requests.

Assigning Demand

You can assign who will be working on the Demand using the Assignment Queue Portlet.

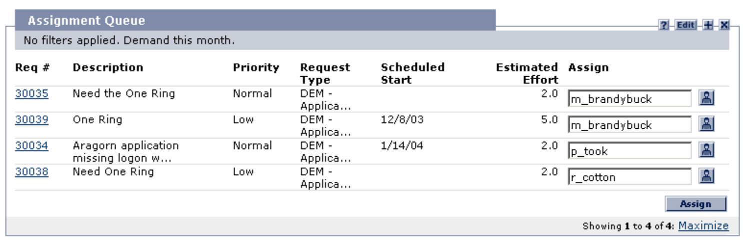
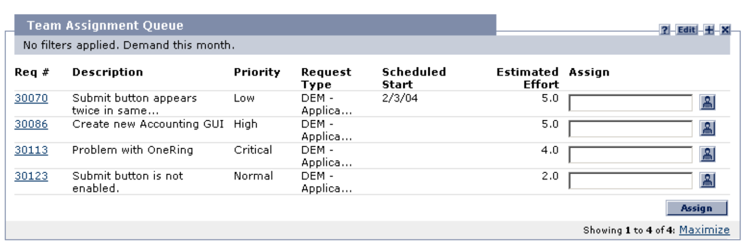


Figure 7-2 Team Assignment Queue page

To assign a user to a Demand:

1. From the Dashboard, open the Team Manager Dashboard page.
2. Go to the Team Assignment Queue Portlet.



3. Assign a user to the Demand.

To assign a user to the Demand:

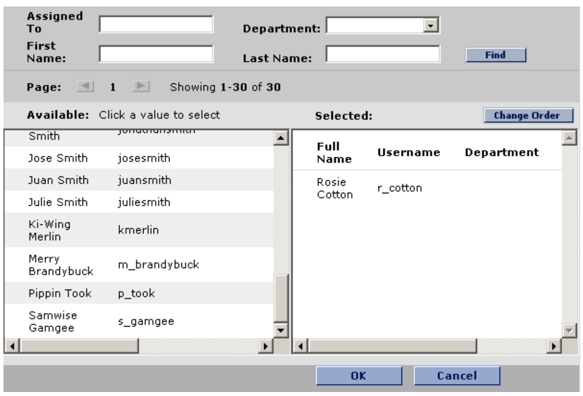
a. Click the **Assigned To** icon.

The Assigned To window opens.

b. Select a user by clicking entries in the Available column.

Note

Users can be de-selected by clicking entries in the Selected column.

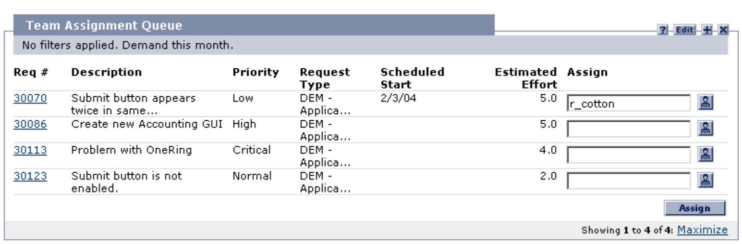


c. Click **OK**.

The entries in the Selected column are moved to Assign field of the Team Assignment Queue Portlet.

4. Click **Assign**.

The selected user is assigned to the Demand.



Managing Demand

The Manage Consolidated Demand page provides a graphical view of Demand in terms of effort. Demand can be analyzed, scheduled or rejected through the Manage Consolidated Demand page. Placing the cursor over a section of the bar opens a tooltip window, listing more precise information concerning the Demand data (see *Figure 7-3*). Clicking on the graph's sections open the Schedule Demand page, allowing you to schedule or reject the selected Demand.

The Manage Consolidated Demand page can be configured to display a range of Demand related data, including displaying Demand by assigned user and Demand by department. The displayed information can be filtered using the Filter By parameters. You can also specify how the filtered data is arranged and which columns should be included using the Arrange Data parameters.

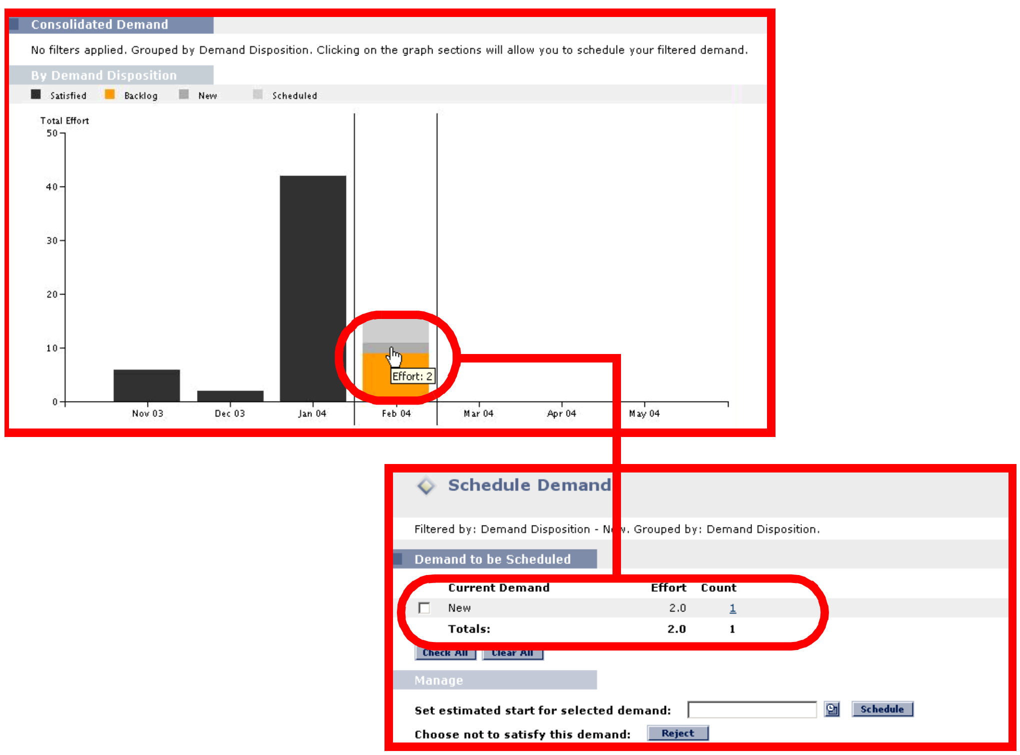


Figure 7-3 Schedule Demand through the Manage Consolidated Demand page

To manage consolidated Demand:

1. Go to the Manage this Demand page.

To open the Manage this Demand page:

- From the menu, click **Demand > Manage this Demand.**
- From the Demand Manager page, on the Consolidate Demand Portlet, click **Manage this Demand**.

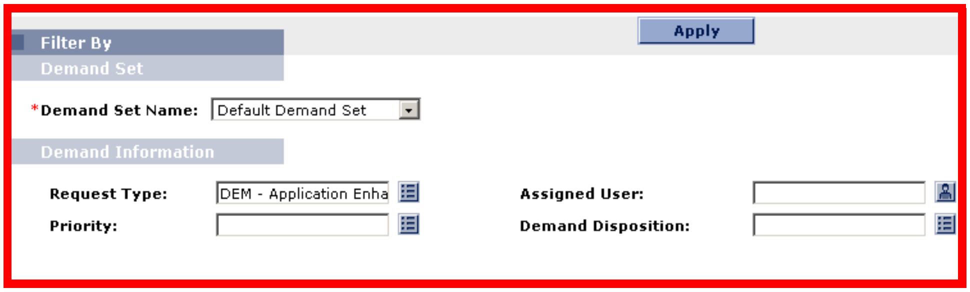
2. In the Filter By section, specify the desired data filters.

   The data filters determine what Demand data is displayed and how the displayed Demand data is organized.

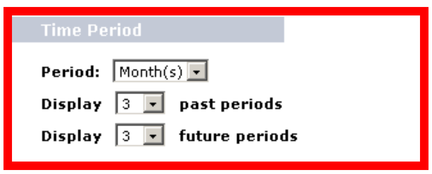
   a. In the Demand Set section, select the Demand Set to be displayed.

b. In the Demand Information section, select what Demand data to capture.

> **Note**
> The fields of the Demand Information section are determined by the configuration of the Demand Set.

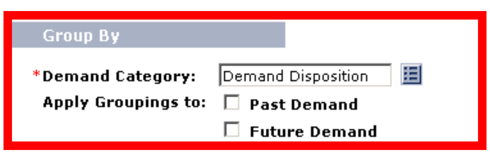


c. In the Time Period section, select the timeframe you want to analyze.



d. From the Group By drop down list, select how to organize the displayed Demand data.

For example, selecting **Demand Disposition** lists Demand by its current condition, such as Backlog, New and Scheduled. Selecting **Priority** lists Demand by priority, such as Critical, High, Normal and Low.



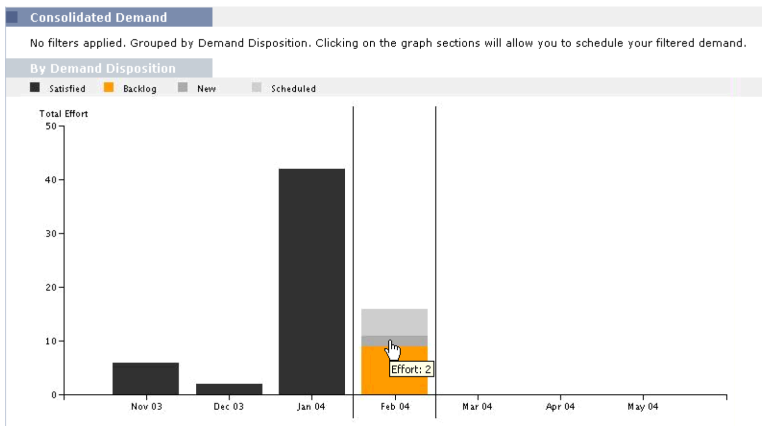
3. Click **Apply**.

The graphic at the top of the page is updated with the applied filters and display information. You can change the filter and grouping parameters to view the Demand in different ways.

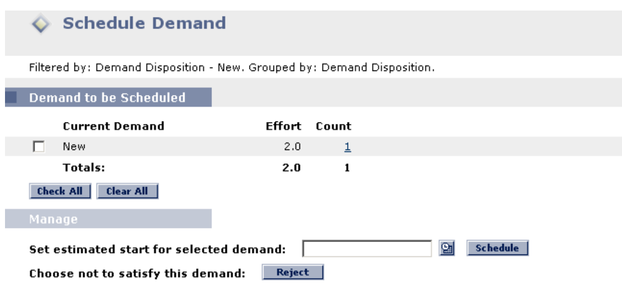
Note

On the Manage Consolidated Demand page, Demand is always presented in terms of effort.

4. From the Consolidated Demand graph, select the Demand to be scheduled or rejected.



The selected Demand is loaded in the Schedule Demand page.



5. Schedule or reject the Demand.

   For details on how to schedule Demand, see *"Scheduling Demand"* on page 64. For details how to reject Demand, see *"Rejecting Demand"* on page 64.

Rejecting Demand

When analyzing your organization's Demand, you might not want to satisfy one or more of the requested Demands. Use the Schedule Demand page to reject those Demands.

To reject Demand:

1. Open the Schedule Demand page.

   See *"Scheduling Demand"* on page 64 for details on how to open the Schedule Demand page.

2. Select the Demand to be rejected.

   See *"Scheduling Demand"* on page 64 for details on how to select Demand.

3. Click **Reject**.

   The selected Demand is rejected.

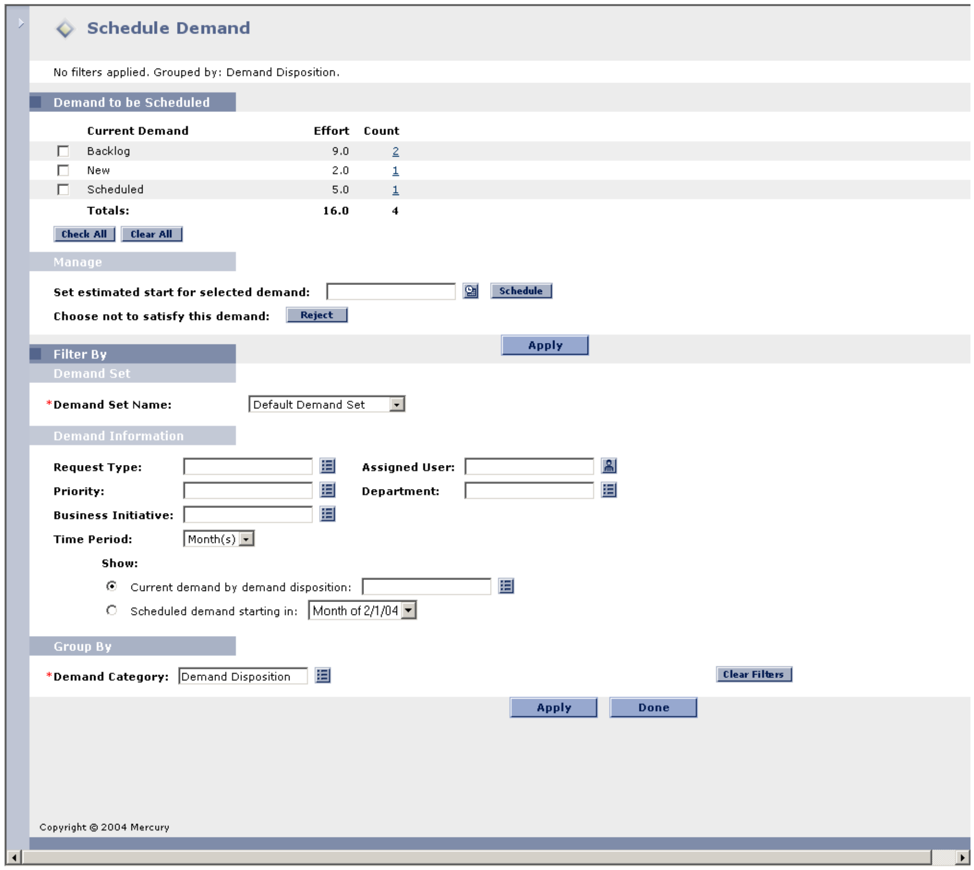
Scheduling Demand

Using Demand Management, you can schedule Demand to start on a specified date. Scheduling Demand is done from the Schedule Demand page.

To schedule your Demand:

1. From the menu, select **Demand > Schedule Demand**.

   The Schedule Demand page opens. Demand that can be scheduled is loaded on the Schedule Demand page.



2. In the Filter By section, specify the desired data filters.

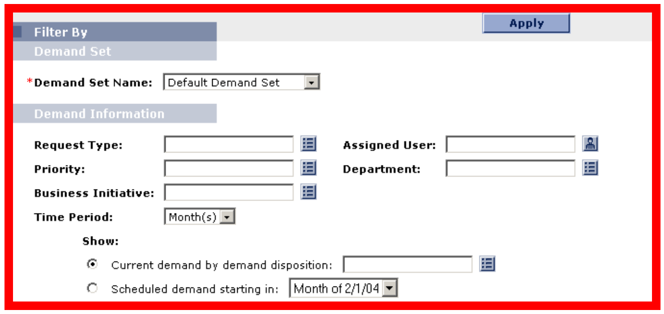
   The data filters determine what Demand data is displayed and how the displayed Demand data is organized.

   a. In the Demand Set section, select the Demand Set to be displayed.

   b. In the Demand Information section, select what Demand data to capture.

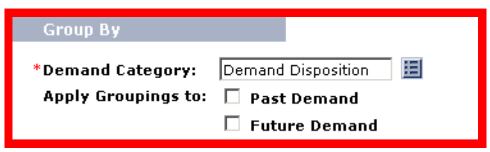
Note

The fields of the Demand Information section are determined by the configuration of the Demand Set.



c. From the Group By drop down list, select how to organize the displayed Demand data.

For example, selecting **Demand Disposition** lists Demand by its current condition, such as Backlog, New and Scheduled. Selecting **Priority** lists Demand by priority, such as Critical, High, Normal and Low.



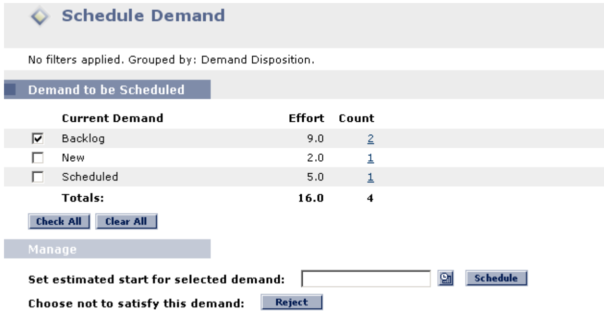
3. Click **Apply**.

The graphic at the top of the page is updated with the applied filters and display information. You can change the filter and grouping parameters to view the Demand in different ways.

4. Select the Demand to be scheduled.

Demand can be selected by the total effort or by individual Demand Requests.

- To select Demand by total effort, select the box on the appropriate line.

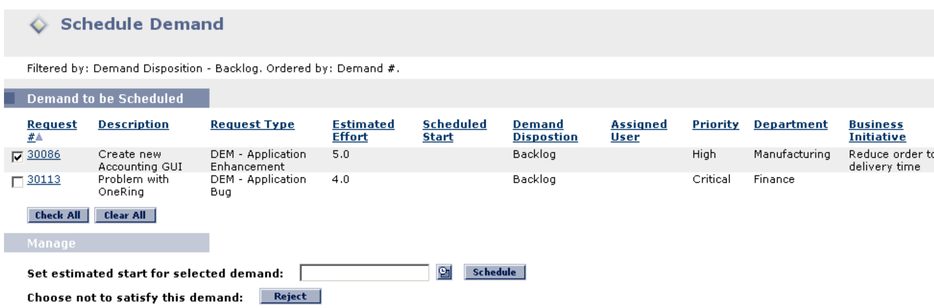


- To select Demand by an individual Demand Request:

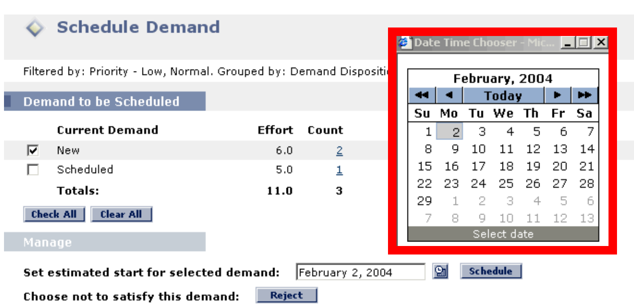
a. In the Count column, click the number.

The Schedule Demand page is refreshed with the individually listed Demand Requests.

b. Select the Demand.



5. In Set estimated start for selected Demand, select the date from the date window.



6. Click **Schedule**.

   The selected Demand is set to start on the selected date.

Appendix A
Demand Management Reports

Mercury Demand Management includes reports that can be run directly from the standard interface. The Demand Management menu includes links to run these reports. The Demand Management reports are available in addition to the other standard Mercury IT Governance Center reports.

This chapter covers the following topics:

Demand Management Report Overview

Mercury Demand Management includes three custom reports that can be run directly from the standard interface. Each of the Demand Management reports can be tailored to meet specific reporting requirements. The following is a list of the menus linked to Demand Management Reports:

- **Report > Request Reports**
- **Demand > Reports**
- **Team Management > Reports**

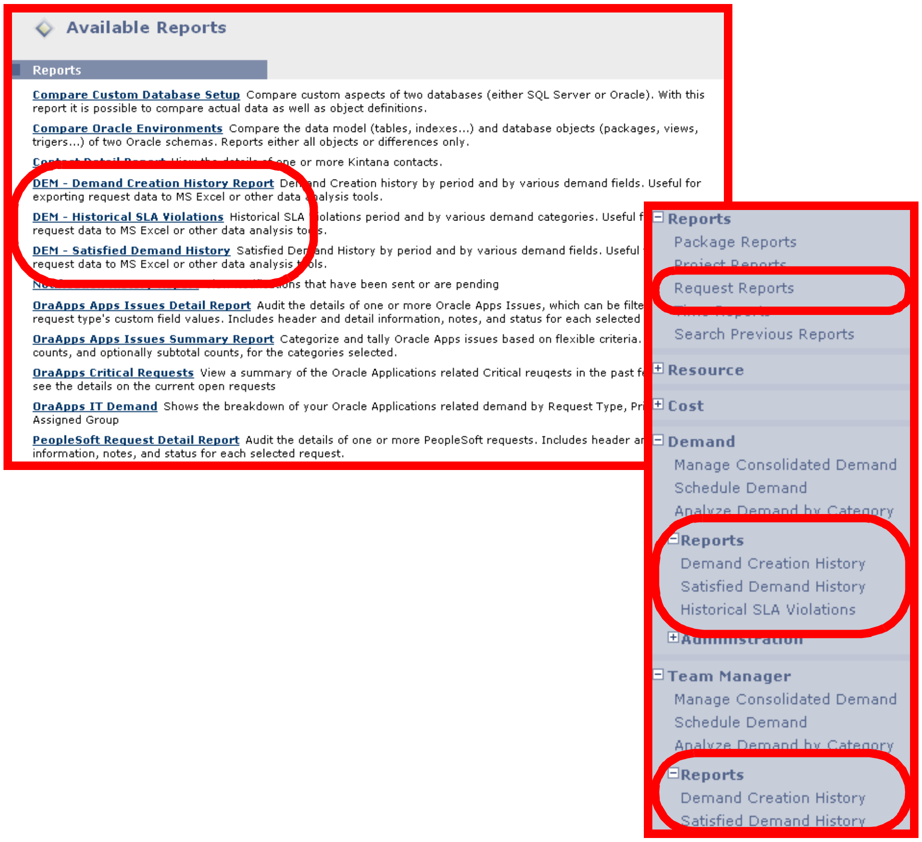


Figure A-1 Demand Management Report Menus

DEM - Demand Creation History Report

The DEM - Demand Creation History report provides visibility into when Demand was created over time. Reports can be configured to specific requirements using the parameters shown in *Figure A-2*.

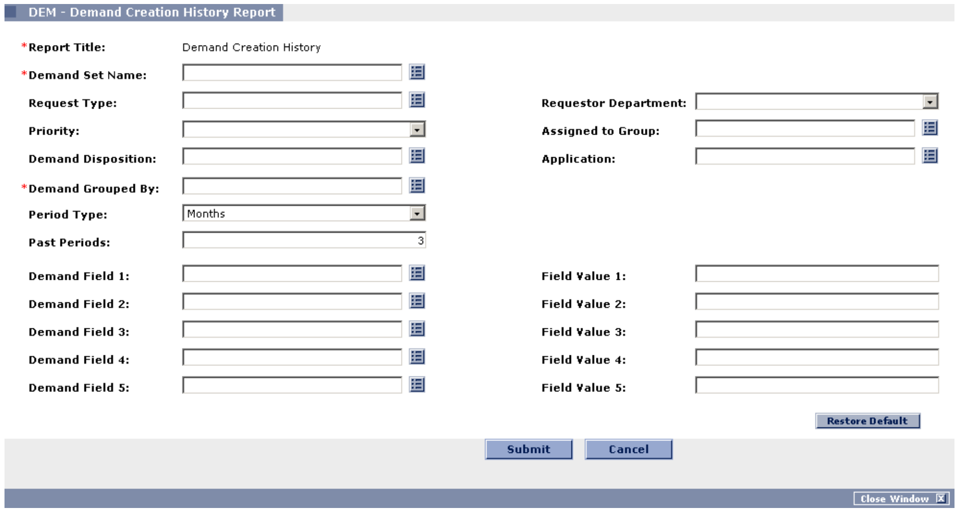
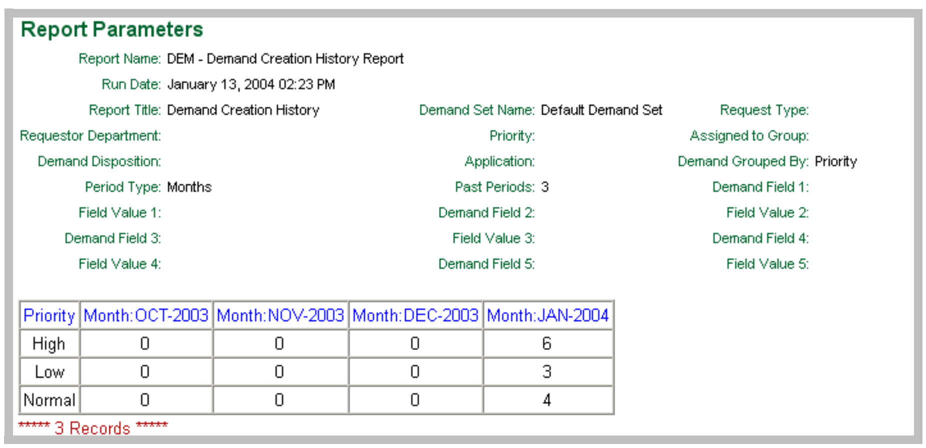


Figure A-2 DEM - Demand Creation History Report page

Figure A-3 illustrates a Demand Creation History report.



Priority	Month:OCT-2003	Month:NOV-2003	Month:DEC-2003	Month:JAN-2004
High	0	0	0	6
Low	0	0	0	3
Normal	0	0	0	4

Figure A-3 DEM - Demand Creation History report

DEM - Satisfied Demand History Report

The DEM - Satisfied Demand History report provides visibility into when Demand was satisfied over a period of time. Reports can be configured to specific requirements using the parameters shown in *Figure A-4*.

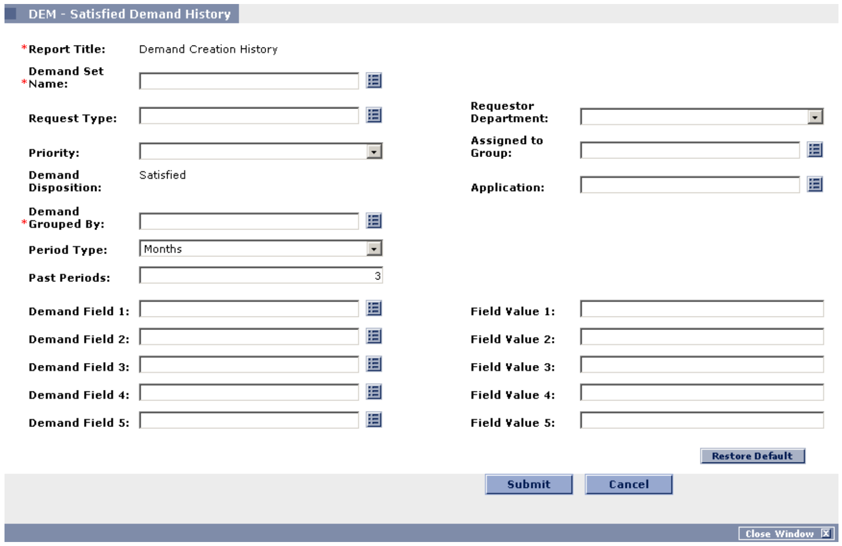
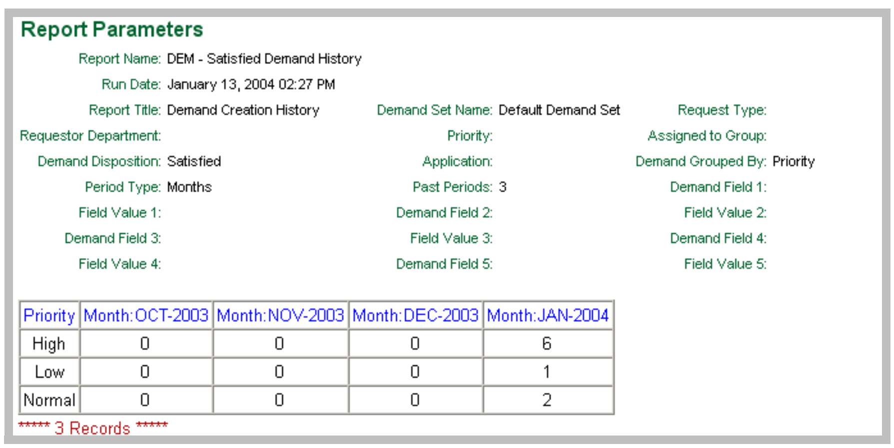


Figure A-4 DEM - Satisfied Demand History Report page

Figure A-5 illustrates a Satisfied Demand History report.



Report Parameters

Report Name: DEM - Satisfied Demand History
Run Date: January 13, 2004 02:27 PM
Report Title: Demand Creation History | Demand Set Name: Default Demand Set | Request Type:
Requestor Department: | Priority: | Assigned to Group:
Demand Disposition: Satisfied | Application: | Demand Grouped By: Priority
Period Type: Months | Past Periods: 3 | Demand Field 1:
Field Value 1: | Demand Field 2: | Field Value 2:
Demand Field 3: | Field Value 3: | Demand Field 4:
Field Value 4: | Demand Field 5: | Field Value 5:

Priority	Month:OCT-2003	Month:NOV-2003	Month:DEC-2003	Month:JAN-2004
High	0	0	0	6
Low	0	0	0	1
Normal	0	0	0	2

***** 3 Records *****

Figure A-5 DEM - Satisfied Demand History report

DEM - Historical SLA Violations Report

The DEM - Historical SLA Violations report provides historical analysis of SLA violations. Reports can be configured to specific requirements using the parameters shown in *Figure A-6*.

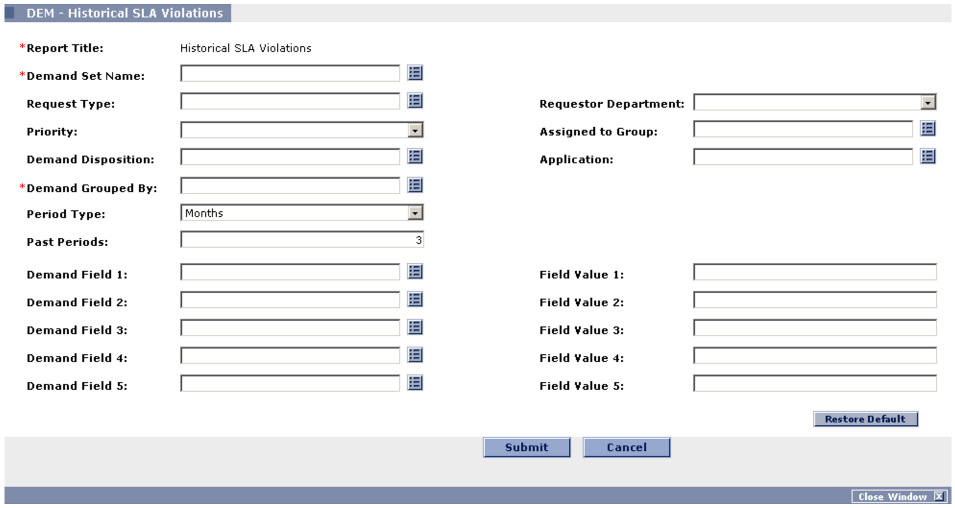
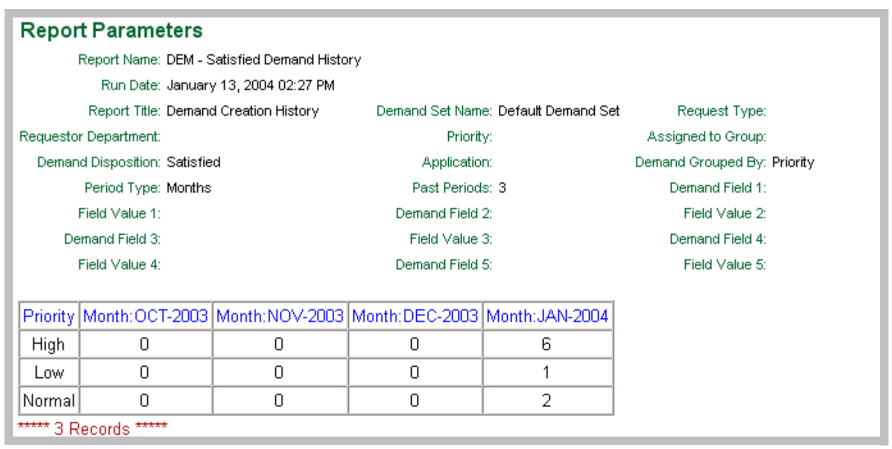


Figure A-6 Historical SLA Violations Report page

Figure A-7 illustrates a Historical SLA Violations report.


Report Parameters

Report Name: DEM - Satisfied Demand History
Run Date: January 13, 2004 02:27 PM
Report Title: Demand Creation History Demand Set Name: Default Demand Set Request Type:
Requestor Department: Priority: Assigned to Group:
Demand Disposition: Satisfied Application: Demand Grouped By: Priority
Period Type: Months Past Periods: 3 Demand Field 1:
Field Value 1: Demand Field 2: Field Value 2:
Demand Field 3: Field Value 3: Demand Field 4:
Field Value 4: Demand Field 5: Field Value 5:

Priority	Month:OCT-2003	Month:NOV-2003	Month:DEC-2003	Month:JAN-2004
High	0	0	0	6
Low	0	0	0	1
Normal	0	0	0	2

***** 3 Records *****

Figure A-7 Historical SLA Violations report

Running Demand Management Reports

The Demand Management reports are found as menu items under **Demand > Reports**. The following procedures details how to run the DEM - Demand Creation History report from the **Demand > Reports** menu.

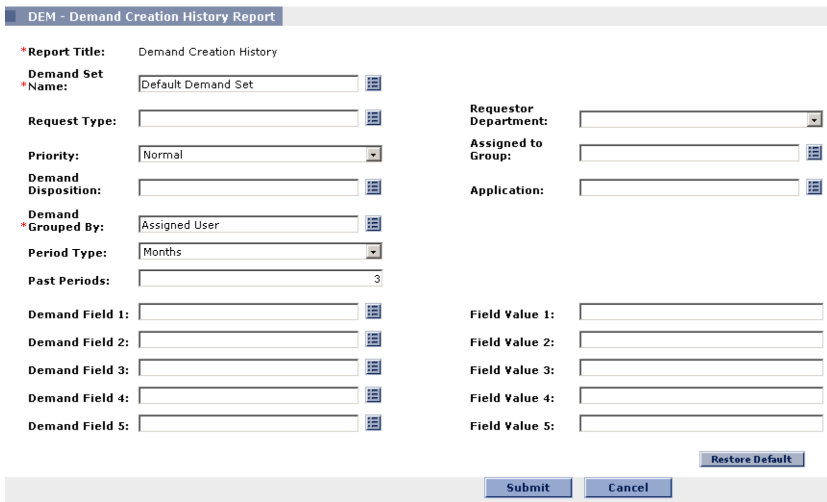
To run a Demand Management report:

1. From the menu, select **Demand > Reports**.

2. Select DEM - Demand Creation History.

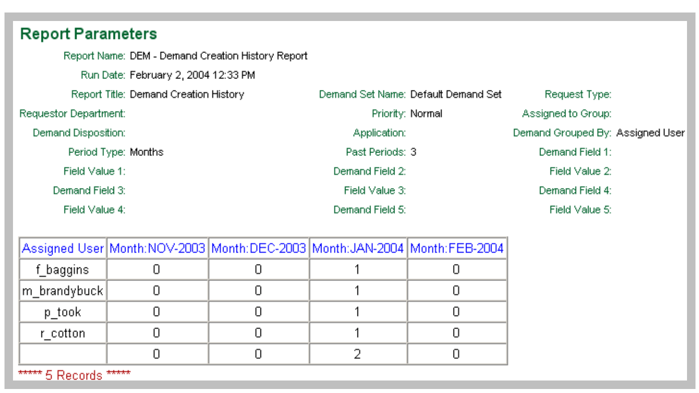
   The DEM - Demand Creation History report edit page is returned.

3. Configure the report's edit page to return the desired data.



4. Click **Submit**.

   A report submission page is return. When the report is complete, the report is opened.



Report Parameters

Report Name: DEM - Demand Creation History Report
Run Date: February 2, 2004 12:33 PM
Report Title: Demand Creation History | Demand Set Name: Default Demand Set | Request Type:
Requestor Department: | Priority: Normal | Assigned to Group:
Demand Disposition: | Application: | Demand Grouped By: Assigned User
Period Type: Months | Past Periods: 3 | Demand Field 1:
Field Value 1: | Demand Field 2: | Field Value 2:
Demand Field 3: | Field Value 3: | Demand Field 4:
Field Value 4: | Demand Field 5: | Field Value 5:

Assigned User	Month:NOV-2003	Month:DEC-2003	Month:JAN-2004	Month:FEB-2004
f_baggins	0	0	1	0
m_brandybuck	0	0	1	0
p_took	0	0	1	0
r_cotton	0	0	1	0
	0	0	2	0

***** 5 Records *****

Appendix B Demand Management Request Types and Workflows

This appendix provides a quick overview of the Request Types and Workflows that are shipped with Demand Management. Each seeded Demand Management Request Type corresponds to a seeded Demand Management Workflow. When a Demand Management Request is created, the corresponding Demand Management Workflow is attached to the newly created Request. *Figure B-1* for an example of a newly created Demand Management Request.

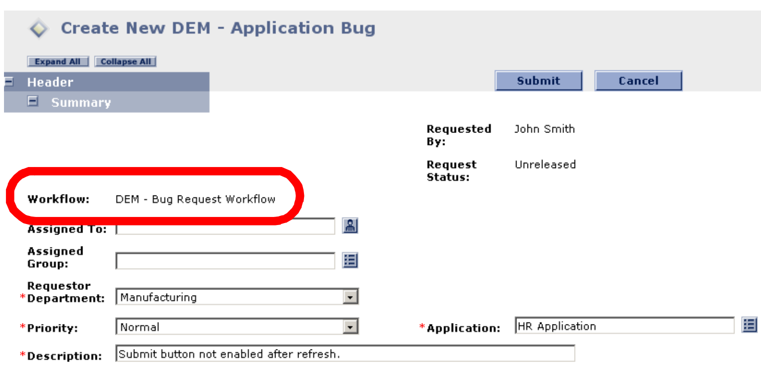


Figure B-1 Creating a Demand Management Request

Table B-1 lists the Demand Management Request Types, their definitions and the associated Workflow.

Note: Only Demand Management power users and application administrators can edit a Request Type or Workflow.

Table B-1. Demand Management Request Types

Request Type	Definition, Action Name, Workflow
DEM - Application Bug	• Definition: Application bugs are used to report problems in current IT applications. • Associated Workflow: DEM - Bug Request Workflow
DEM - Application Enhancement	• Definition: Application Enhancements are used to request new functionality in IT current applications. • Associated Workflow: DEM - Enhancement Request Process
DEM - Database Refresh	• Definition: Database refresh requests can be made for all IT Operations applications in the testing phase. Standard IT operation service levels apply. • Associated Workflow: DEM - Database Refresh
DEM - Initiative	• Definition: Initiative requests are used to request key projects for future quarters, provided approval from key stakeholders. Initiative requests are reviewed in the third week of each quarter. • Associated Workflow: DEM - Project Initiative Process

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