Mercury™ IT Governance Center

Processing Requests (Demand Management)

Version 5.5.0

MERCURY INTERACTIVE

Mercury Interactive Corporation
1325 Borregas Avenue
Sunnyvale, CA 94089 USA
Tel: (408) 822-5200
Fax: (408) 822-5300

If you have any comments or suggestions regarding this document, please send them via e-mail to documentation@merc-int.com.

Publication Number: ProcessRequests-0304A

Table of Contents

Chapter 1 Introduction

Mercury Demand Management is an application used to manage technology initiatives (Demand) from inception to implementation. Initiatives are generated via Requests, which are processed using a graphical Workflow business modeler.

A critical component for tracking and managing demand in an organization involves logging and resolving individual Requests in the system. Demand Management features tools and configurable processes for dealing with these Requests. Data is captured by prompting users of the Request for process-specific information. This ensures the required information is collected and validated at the appropriate time in the process. Complex business rules can be followed by using different approval methods. Prioritization and delegation features allow Requests to efficiently advance through their specific Workflow, routing them to relevant departments, groups or individuals.

Users can monitor the status of a Request from their desktop using a Web browser. Email and pager notifications are generated as the Request passes through various stages of the process, keeping all project members informed. Throughout the process, users are prompted to enter additional information, appropriate to their specific Task. Management reports and Dashboard views are also available to help monitor technology initiatives and service levels.

About This Document

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

Key Concepts	Describes the general concepts of Mercury Demand Management. This includes Requests and Workflows.

Accessing Demand Management	Details how to logon to the standard interface.
Creating a Request	Provides the procedures on how to create a Request.
Viewing Request Status and Details	Shows how to view an existing Request.
Processing Requests	Describes how Requests can be tracked and processed.
Managing Requests	Show how Requests can be viewed, changed or deleted.
Mercury Demand Management Reports	Lists the procedures on how to submit and view reports.
Integrating Requests and Projects	Details how to link Projects and Requests.

Intended Audience

The intended audience for this document include:

- Users of Demand Management
- Managers who create and manage Requests
- Business users responsible for creating and processing Requests

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

Table 1-1. Document conventions [continued]

Convention	Description	Example
`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.
Managing Your Projects (Project Management)	This document explains how to work with Projects using Project Management.
Security Model Guide and Reference	This document presents an overview of the data security model and provides instructions for controlling access to different entities.
Reports Guide and Reference	This document provides details for running reports.
Configuring a Request Resolution System	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.

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 IT Governance Center. For more information, visit the Education Services Web site at *http://www.merc-training.com/main/ITG*.

Chapter 2 Key Concepts

This chapter defines the common concepts and terms used in Mercury Demand Management. Understanding these concepts and terms is necessary when using Demand Management.

This chapter covers the following topics:

Requests

A Request is the fundamental work unit of Demand Management. A Request's detail 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.

A Request has an associated Request Type that determines which fields are included in a Request's detail page. As a Request goes through its steps, users are prompted for all of the information necessary to bring the Request to closure. Once the basic Request information has been entered, the corresponding Workflow is automatically selected, based on the Request Type.

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.

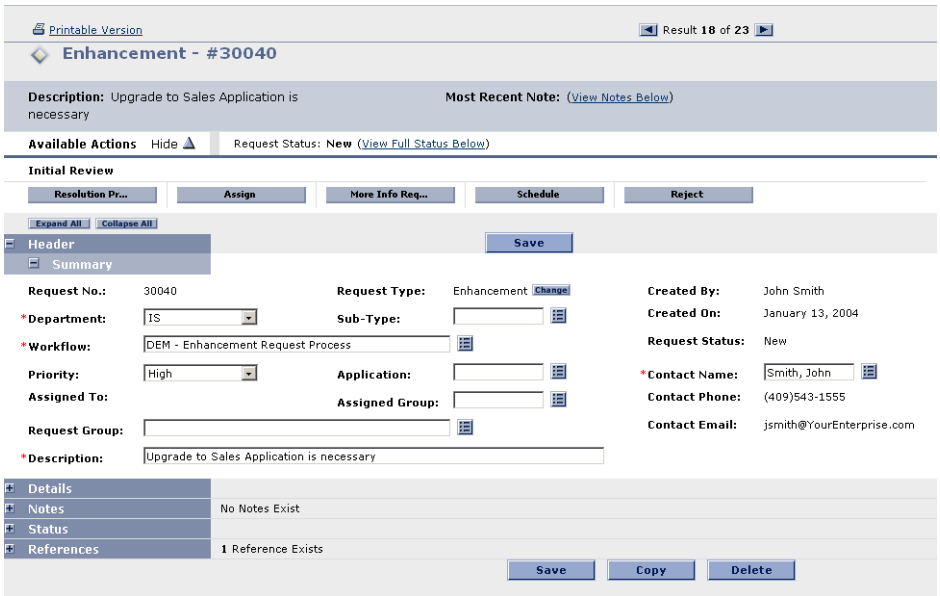


Figure 2-1 Demand Management Request

Request Type

A Request Type is a general category defining the structure of a Request in Demand Management. Demand Management includes such pre-defined system Request Types as the Bug Request Type and Enhancement Request

Type. The fields used when a Request is created are customizable based on the Request Type.

The base installation of Demand Management is seeded with default Request Types and Request Header Types that can be modified to meet the needs of the business. The Request Type is also used to determine the default Workflow through which a Request is routed, as well as the Request Category of the Request. Custom Request Types and custom Request Header Types can be copied from default configurations and modified or created from scratch.

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 (and provides the framework for) the storage and manipulation of data within a Request.
- Represents a different process within a business. The Request Type can be defined to capture different kinds of data and follow different business and resolution processes.

Figure 2-2 shows a Demand Management Request Type.

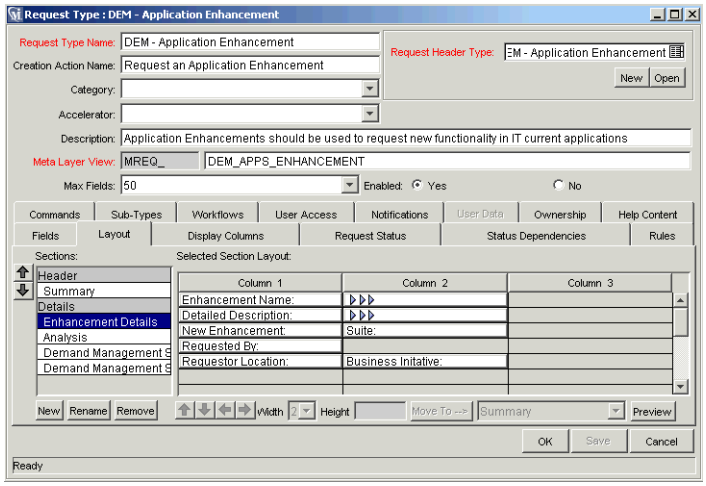


Figure 2-2 Demand Management Request Type

Request Header Types

Request Header Types define a collection of fields appearing in the header region of the Requests using that Request Type. The presentation and validation of these fields depends upon the Request Type. When creating or configuring a new Request Type, associate a Request Header Type with that Request Type. *Figure 2-3* shows a Request Header Type.

Definition

Request Header Type

A Request Header Type can be thought of as a basic template for the header area that appears at the top a Request. Request Header Types have the following characteristics:

- Provides a framework for the storage and manipulation of Request header data.
- Represents attributes common to multiple types of Requests. Header data is useful for locating and reporting certain types of Requests. Examples of Header Data are Creator, Assigned User, Description, Summary, and Department.
- Labels and arranges header fields in a manner most familiar to specific Business Units.

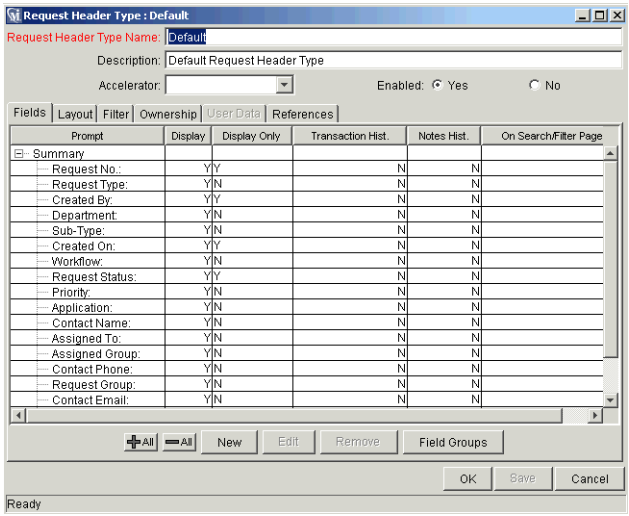


Figure 2-3 Request Header Type

Workflows

A Workflow is a logical series of steps defining a process that Requests follow. Workflows 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.

A sample Workflow for an Application Enhancement is shown in *Figure 2-4*.

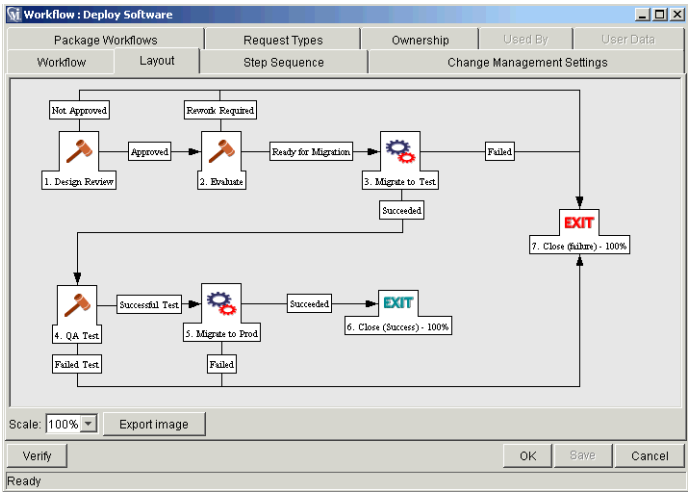


Figure 2-4 Visual Workflow

Workflow Steps

Workflow Steps are the events that are linked together to form a complete Workflow. Demand Management uses three types of Workflow Steps:

- Decisions
- Executions
- Conditions

In a Decision step, a user or group of users needs to indicate an outcome, such as an approval of work or an indication that a review has been completed. For example, Review Request is a Decision step.

In an Execution step, the system performs an action and then updates the step with the result. These actions can be as simple as calculating the value for a

token or as complex as copying files, running programs and updating Web pages.

Conditions are logic steps used for complex Workflow processing, such as allowing the Workflow to proceed only when each of three different steps are completed. *Figure 2-5* shows the steps of a typical Workflow.

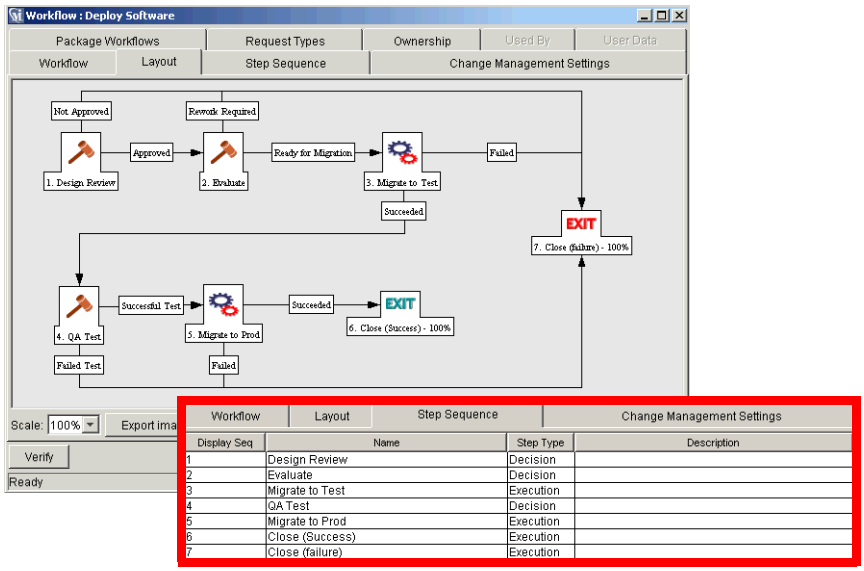


Figure 2-5 Workflow Steps

Request Status

A Request Status is a summary indicator of the current state of a Request. For example, a Request can have a Request Status of New, Assigned or In Progress. Request Statuses are automatically set as the Request moves through its Workflow.

Request Statuses are user-defined and attached to Request Types. Each Request Type can have different Request Statuses. For example, the Request Status Request Approved might be in an Enhancement Request Type but not in a Bug Request Type. Behavior can be defined for individual Request Statuses, such as requiring information in specific fields for Requests at specific Request Statuses.

A Request's status can be viewed on the Header section of the Request's detail page, as shown in *Figure 2-6*.

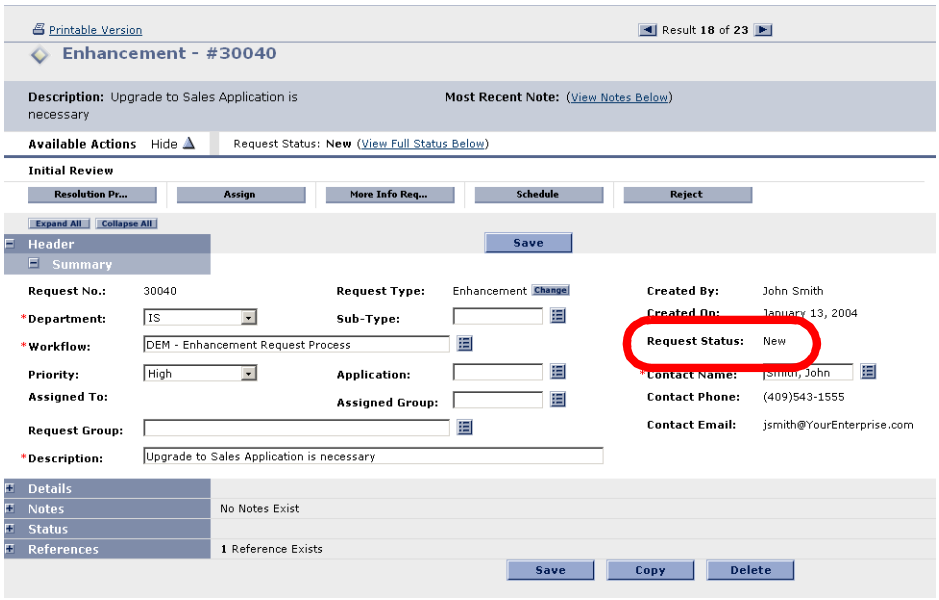


Figure 2-6 Request Status on a Request's detail page

Dashboard

Mercury ITG Dashboard consists of a set of configurable, role-based visual displays called Portlets. These Portlets provide relevant summary information and highlight exception conditions. From these Portlets, users can drill down to any desired level of detail. The Dashboard displays the true status of initiatives and Requests, based on the current data. Current data is automatically captured as part of the work actually being performed.

The Dashboard is designed for use by participants throughout your IT organization. For example, developers can use the Dashboard to view all their own Action Items, and end-users can consult their own Dashboards to see the status of all the Requests they have submitted. Tabs in the Dashboard interface allow users to group Portlets according to their own needs. *Figure 2-7* shows Mercury IT Governance Dashboard.

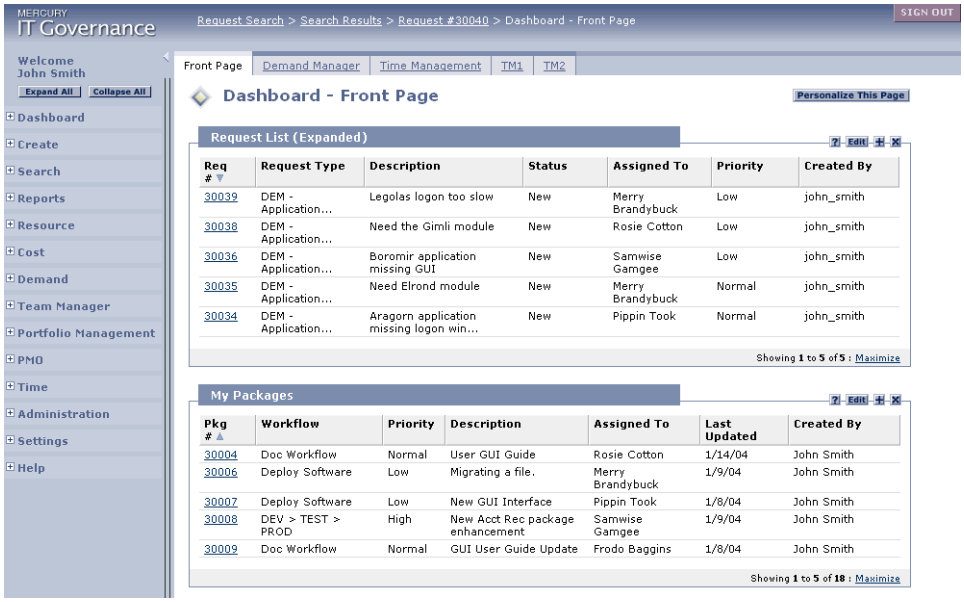


Figure 2-7 Mercury IT Governance Dashboard

Portlets

Portlets are configurable, role-based visual displays providing relevant summary information of business data. The application administrator can assign and configure Portlets to a user's Dashboard. Additionally, each user can select which Portlets they want on their Dashboard. They can then personalize those Portlets to display only the information that is relevant 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 IT Governance Center features a set of Portlets for each Mercury ITG product. These Portlets are designed to provide the most efficient and flexible access to business data. It is also possible for the application administrator to create custom Portlets to suit a particular business need. *Figure 2-8* shows a typical Portlet.

Portlets can only be added to a Dashboard that is associated with the products licensed at your site. For a full list of the available Portlets, see *Using the Dashboard*.

Request List (Expanded)

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30039	DEM - Application...	Legolas logon too slow	New	Merry Brandybuck	Low	john_smith
30038	DEM - Application...	Need the Gimli module	New	Rosie Cotton	Low	john_smith
30036	DEM - Application...	Boromir application missing GUI	New	Samwise Gamgee	Low	john_smith
30035	DEM - Application...	Need Elrond module	New	Merry Brandybuck	Normal	john_smith
30034	DEM - Application...	Aragorn application missing logon win...	New	Pippin Took	Normal	john_smith

Showing 1 to 5 of 5 : Maximize

Figure 2-8 Portlet

References

In addition to header and detail field information, Requests can have references to other entities or points of information. This allows for easy access and visibility to related data. Summary information for References is viewed as part of the Request. *Figure 2-9* shows the Reference drop-down menu.

Figure 2-9 Request References

Each reference can be viewed in detail with a click of the mouse. There are several reference types defined in Demand Management:

- Attachments
  It is possible to attach a file from a local machine to the current Request. The attached file is copied to the server and can then be accessed by other Demand Management users. This feature is particularly helpful for referencing a document that is not already Web accessible.
- Requests
  References can be added to Requests to relate to other Requests. In

addition to referencing existing Requests, a Request to be referenced can be created from the **References** tab. A relationship (informational or dependent) can then be specified between the Request and the new Reference. See *"Adding References"* on page 28 for more details.

For Requests that were spawned from a step in the Request Workflow step, references to the Requests are automatically generated, establishing a two-way tie between the spawned Request and the original Request.

- Packages
  A reference can be added to an existing Package. For Requests that spawn Mercury Change Management Packages, references to the Package(s) are automatically created. This establishes a two-way tie between the Request and Package.

  A new Package to be referenced can also be created from the **References** tab. The relationship (informational or dependent) between the Request and the new reference can be specified, such as successor, predecessor or child of this Request. See *"Adding References"* on page 28 for more details.

- Task
  Mercury Project Management Tasks are associated to the current Request using Mercury Project Management. Varying dependencies can be set between the Request and the Task. Tasks can also be created from Requests in Project Management. See *"Adding References"* on page 28 for more details.

- Project
  A current Request can be attached to a Mercury Project Management Project. The Project is then associated with the Request.

- Documents (URL)
  It is possible to reference an unlimited number of documents to a given Request. These documents need to be Web accessible and are referenced by simply entering the Web address (URL) of the document. Once attached, the documents can be opened by selecting the reference.

Help on Requests and Request Fields

Help on Requests and Request fields provides customizable help content for Requests in Demand Management. Fields, sections and Request Type help content can be edited by the application administrator to meet the specific

needs of the business. The result is that where help content is configured (on a field, section, or Request Type), end users can move to that help content by clicking the **Help Content** icon ( ). *Figure 2-10* shows a typical Dashboard page with **Help Content** icons.

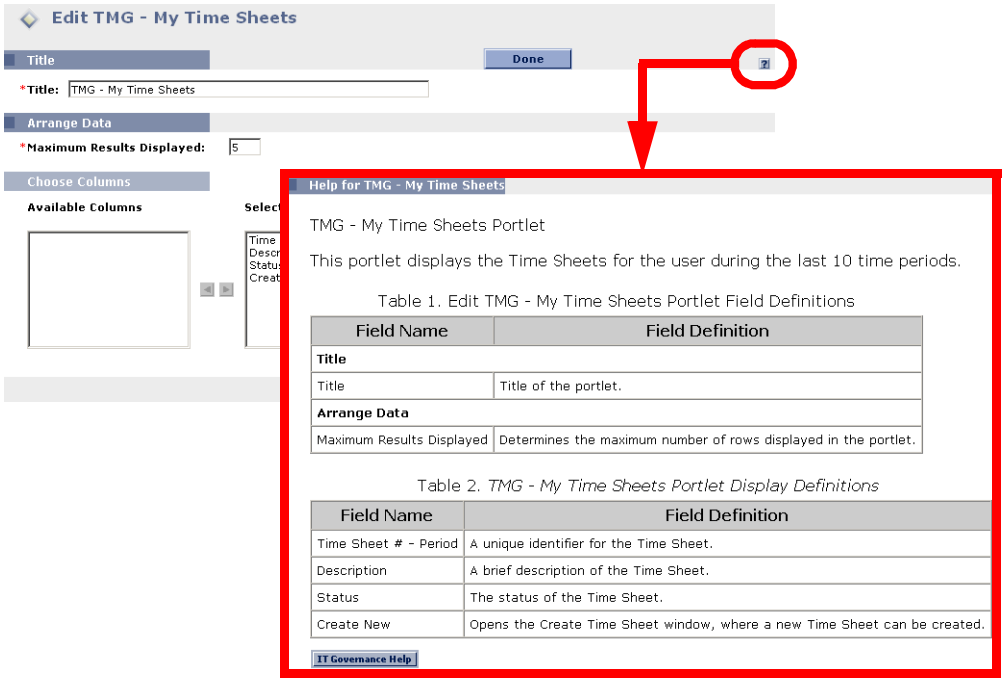


Figure 2-10 Help on Requests and Request Fields

Displaying Mercury ITG Data

As more of your business processes and solutions are modeled using Mercury ITG Center, the data in the system will grow. For example, you can use Mercury Change Management to automate 200 different processes — thus potentially introducing 200 Workflows. Sifting through 200 entries in an auto-complete list or 200 search results could be cumbersome.

Mercury ITG Center can be configured to display only information that is most relevant to a specific business role. Depending on this configuration and the Access Grants given by the application administrator, some data will not display when, for instance, clicking on an auto-complete list or performing a search for a particular entity.

A Project Manager and a Software Developer can each have different Access Grants. Each sees different sets of Requests Types and Workflows when clicking on auto-complete lists or running searches, with each set suited to their particular business role.

For more information on Access Grants and data, refer to the Security Model Guide and Reference.

Chapter 3

Accessing Demand Management

Mercury Demand Management is a Web-enabled software system. The software can be executed using certain Java-enabled Web browsers, such as Netscape Communicator 7.02+, or Microsoft Internet Explorer 5.0+.

Mercury IT Governance Center features two interfaces:

- Standard interface
  The standard interface uses HTML and Javascript to provide users with access to many key areas of functionality, such as creating and processing Requests and running reports. Demand Management users primarily interact with the standard interface.
- Mercury IT Governance Workbench interface
  The Workbench is a Java applet designed to help application administrators, product configuration personnel, and Power Users perform advanced configuring and processing tasks, such as creating Request Types and Workflows.

This chapter covers the following topics:

Logging on to the Standard Interface

The standard interface is accessed through a Web browser over a network. This section details the steps required to logon to Mercury Demand Management.

To Logon to Mercury Demand Management:

1. Contact the System Administrator or Webmaster to obtain the following:
   - Web address (URL) where Demand Management is installed
   - A username
   - A password
2. From the browser, access the web address.

   The Logon page opens.

3. In Username, enter the username.
4. In Password, enter the password.

Tip

To have the server retain a password, click the **Remember my logon** check box. Once this check box is selected, a logon password will not be required.

5. Click **Submit**.

   The Dashboard opens. If an incorrect password is entered, you will be prompted for the correct password. Re-enter the logon information and click **Submit**.

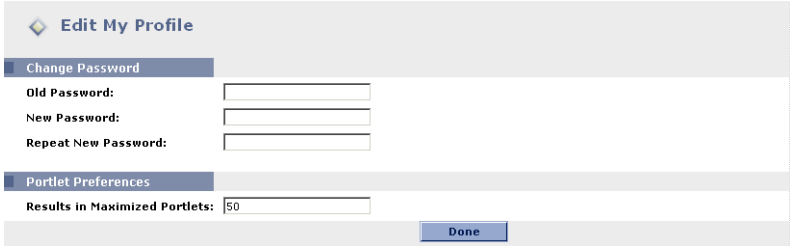
Changing Your Password

Some users are forced to change their password upon the initial logon.

To change a password:

1. Logon to Mercury Demand Management.
2. On the menu bar, click **Settings > Edit my Profile**.

   The Edit My Profile page opens.



3. In Old Password, enter the existing password.
4. In New Password, enter the new password.
5. In Repeat New Password, re-enter the new password.
6. Click **Done**.

   An error message is returned if:

   - The old password was not correctly entered.
   - The New Password and Repeat New Password fields do not contain the same exact entry.
   - The new password is identical to the old password.

   The password is accepted if no error message is returned.

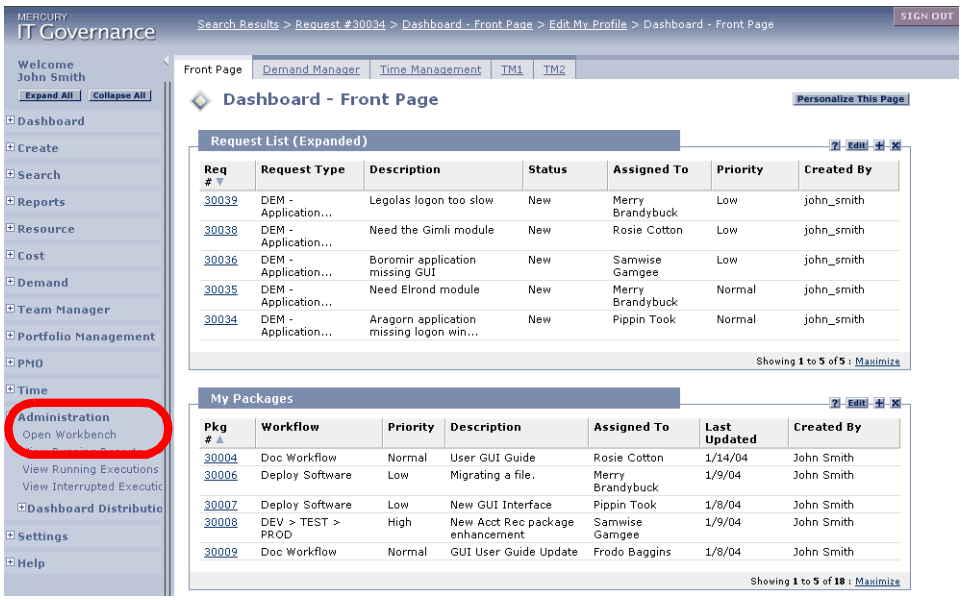
Launching the Workbench

The Workbench provides an interface accessing advanced processing and configuration functionality in Mercury ITG Center. The Workbench is accessed from the Dashboard's Menu bar.

To launch the Workbench:

1. Logon to Mercury Demand Management.

2. From the Menu bar, select **Administration > Open Workbench**.



When the Workbench is accessed for the first time, several question dialogues might appear asking permission to automatically install the Java client components. Answer **Yes** in all question dialogues and follow any other instructions provided in the browser window. Depending on the client's connection to the server, this might take several minutes. Subsequent logons will be much quicker, as the client does not have to install any additional components on their machine.

Figure 3-1 shows the pop-up window that opens to display the status of the Workbench. When the Workbench opens, the pop-up window indicates the Workbench is active. This window must remain open to use the Workbench.

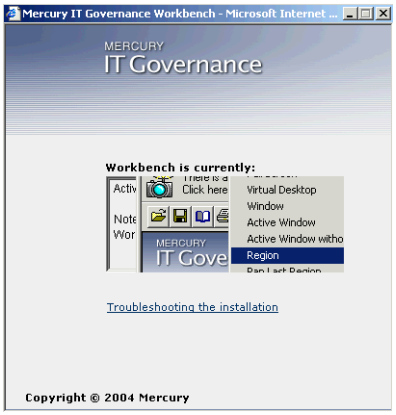


Figure 3-1 Workbench Pop-up window

Note

If a pop-up blocker is installed on your web browser, the Workbench will not open.

Chapter 4
Creating a Request

Requests are the repositories for all of the information necessary to take a series of actions and move through a Workflow.

This chapter covers the following topics:

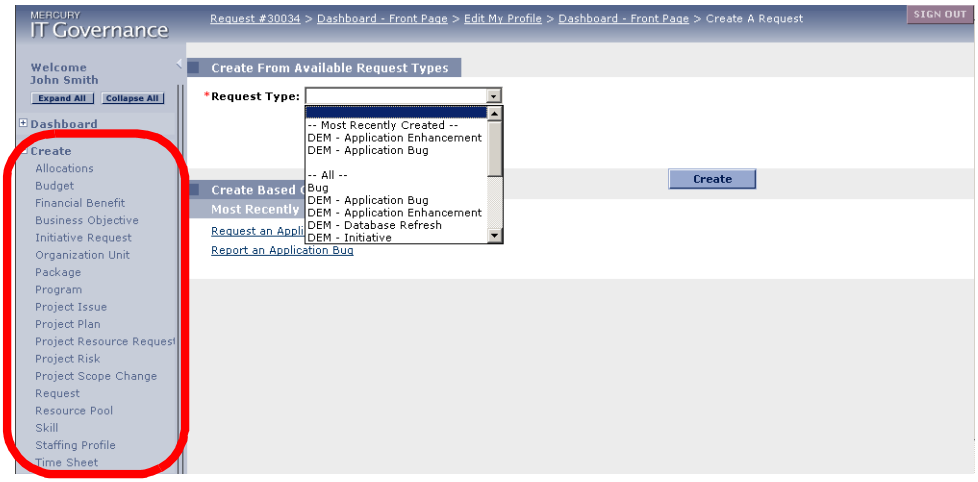
Creating a Request

Users create Requests every time a standard business process is invoked. The Request is given a unique number and is tracked from start to finish. This ensures task completion and accountability for all steps within the selected Workflow.

To create a new Request:

1. Logon to Mercury Demand Management.
2. From the menu bar, select **Create > Request**.

   The Create New Request page opens.



3. In the Create From Available Request Types section, select the Request Type to generate from the Request Type drop down list.

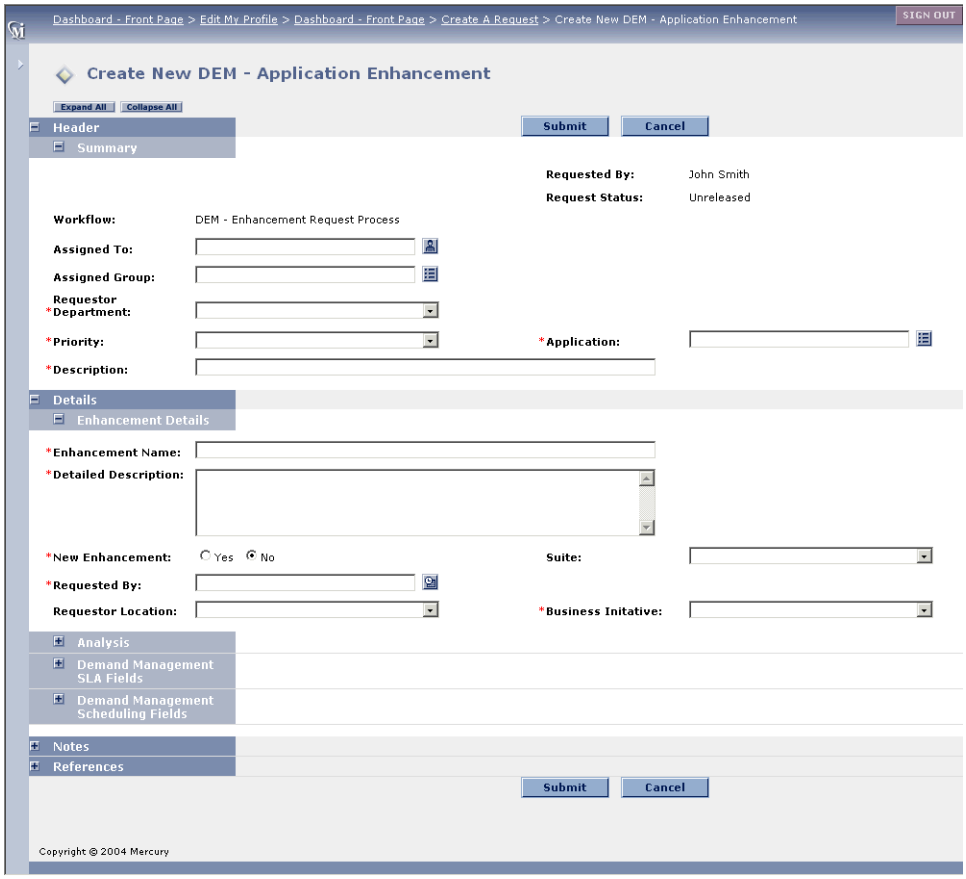
   When selecting a Request Type from the list, a description of the Request Type is displayed below the field. To save time, the most recently created Request Types are first on the list. You can also select Request Types in the Create Based on Desired Action section.

Note

When creating a Request, you might only see the Request Types that are most relevant to your business role or level of system access. See *"Displaying Mercury ITG Data"* on page 15 for more detailed information.

4. Click **Create**.

   The Create New Request page opens. The Header and Detail fields might be different, depending on the selected Request Type.



5. In the Header section, enter Request Header information.

   Required fields have a red asterisk (*). All other fields are optional, but are often helpful when others are reviewing the open Request. For information concerning a specific field, click the **Help Content** icon ( ) next to the field.

6. In the Details section, enter Enhancement information.

   Required fields have a red asterisk (*). All other fields are optional, but are often helpful when others are reviewing the open Request. For information concerning a specific field, click the **Help Content** icon ( ) next to the field.

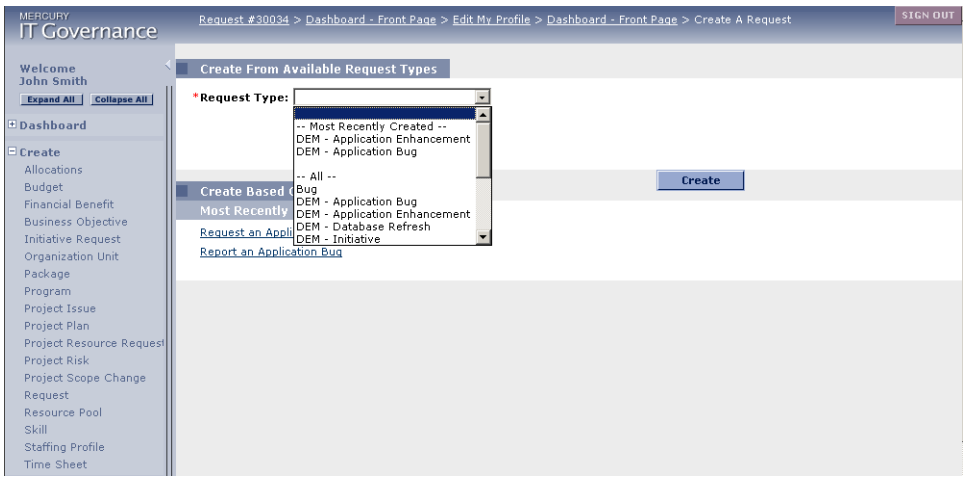
7. In the Notes section, enter additional information.

8. In the References section, add References to the Request.

In some cases it might be useful to reference a web accessible file, or attach a document or file from a local machine to the current Request. Additionally, other entities such as Packages, Tasks, or other Requests can be referenced. For more information on adding references, see *"Adding References"* on page 28.

9. Click **Submit.**

   The Request is submitted and saved. The Request Creation Confirmed page opens.



After submitting the Request, you can continue your Demand Management session by:

- Clicking the link (Request #) to see the newly generated Request's detail page.
- Generating a new Request by selecting the Request Type from the Request Type drop down list and clicking **Create**.

Once a Request has been submitted, it is assigned an initial status, such as New. It is then routed along a standard business process of approvals, decisions, and/or actions, depending on the associated Workflow. See *"Processing Requests"* on page 71 for details.

Creating a Request from the References Section

A new Request can be created from the References section of a Request's detail page.

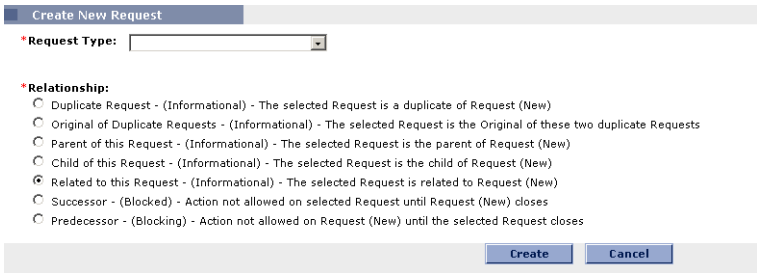
To create a Request from a Request's detail page:

1. Logon to Mercury Demand Management.
2. Open a Request.

   See *"Searching for Requests"* on page 51.

3. Scroll down to the Reference section.
4. From the New Reference drop down list, select **Request (New)**.
5. Click **Add**.

   The Create New Request page opens.



6. From the Request Type drop down list, select the Request Type.
7. Select a Relationship by checking the appropriate radio button.
8. Click **Create**.

   The Create New Request page opens.

9. Enter the information relating to the new Request.
10. Click **Submit.**

    The Request is submitted and saved.

Copying Requests

A new Request can be created by copying an existing Request. This can save time by eliminating the need to re-enter information that is common between the Requests.

To generate a new Request using the copy feature:

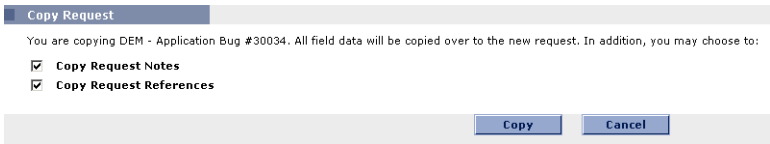
1. Open a Request.

   See *"Searching for Requests"* on page 51.

2. Scroll to the bottom of the Request's detail page.

3. Click **Copy**.

   The Copy Request page opens. All Header and Details fields are copied to the new Request.



4. Select whether to copy the original Request's Notes and/or the References sections.

5. Click **Copy**.

   A new Request detail page opens with the copied information.

6. Modify the new Request's data as required.

7. Click **Submit.**

   The Request is submitted and saved.

Note

Copied Requests are not submitted by default. Click **Submit** in the Request's detail page to send the Request along its Workflow.

Adding References

Add a reference to a Request from a Request's detail page. There are several reference types defined, including:

- Attachment

- Package
- Project
- Release
- Request
- Task
- URL

For some reference types, such as for Packages and other Requests, a functional dependency to the reference can be created. For example, you can specify that a Request is a Predecessor to the Package. This means the Package will not continue until the Request closes.

To add a Reference to a Request:

1. Open the Request.

   See *"Searching for Requests"* on page 51.

2. Scroll down to the References section.

3. From the New Reference drop down list, select the type of reference to be generated.

4. Click **Add**.

   An additional page opens where the exact reference can be specified.

   This page is different depending on the type of reference selected. The following sections provide instructions for referencing different entities:

   - *Attaching Requests*
   - *Attaching Packages*
   - *Attaching Releases*

- *Attaching Projects*
- *Attaching Tasks*
- *Referencing a URL in Demand Management*
- *Referencing an Attachment in Demand Management*

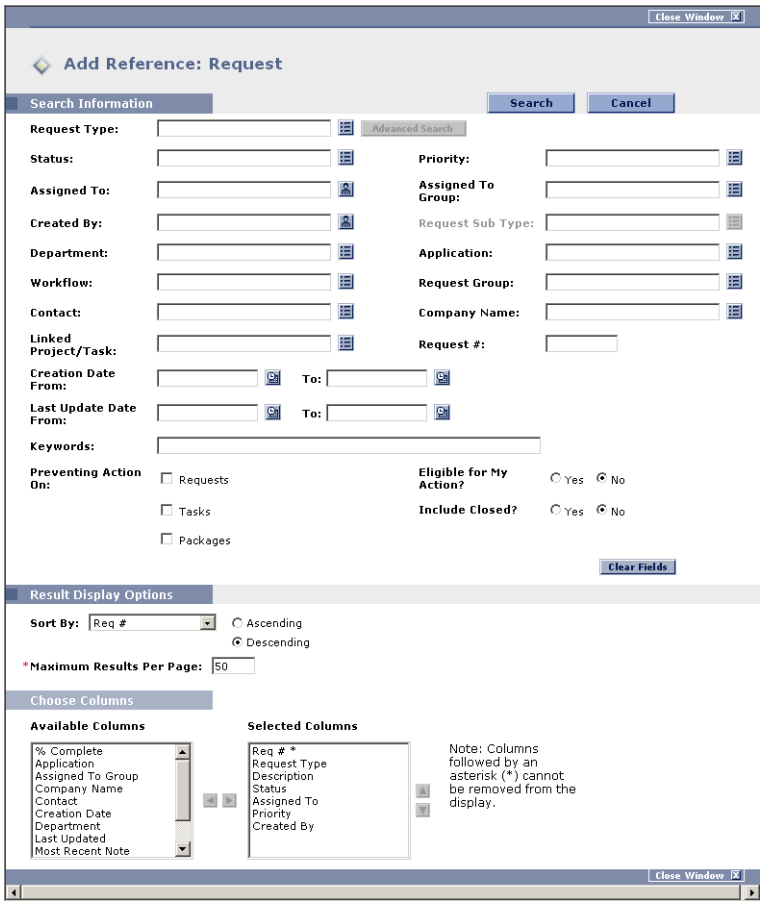
For some reference types, such as for Packages and other Requests, you can create a functional dependency to the reference. See *"Reference Dependency Relationships"* on page 44 for a list of the dependencies that can be set for each reference type.

Attaching Requests

To attach Requests to a Request:

1. Open the Request.
2. Scroll down to the References section.
3. From the New Reference drop down list, select **Request (Existing)**.
4. Click **Add**.

   The Add Reference: Request page opens.



5. Search for the Request to add.

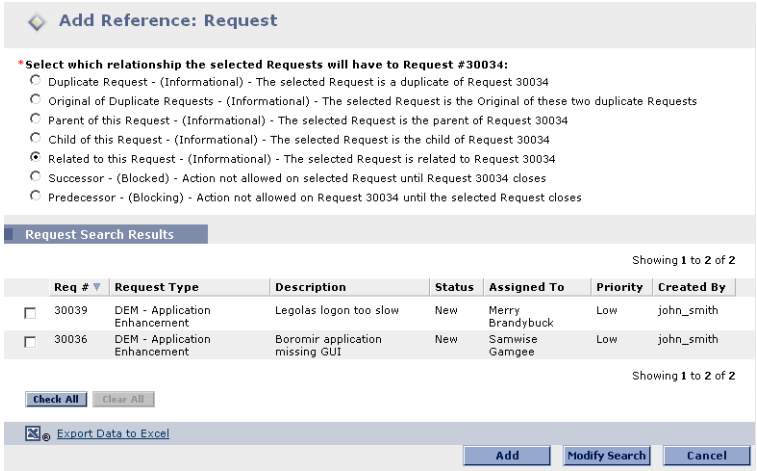
   To search for the Request:

   a. In the Search Information section, enter search criteria.

   b. (Optional) In the Result Display Options section, enter the display options.

   c. Click **Search**.

      The page refreshes with the Request(s) matching the search criteria and a list of relationship types.



6. Select the type of relationship between the Request and its reference.

   Check one of the radio buttons. See *Table 4-2 on page 45* for a description of the relationships.

7. Select the Request to reference.

   More than one reference can be selected by checking more than one check box.

8. Click **Add**.

   The Add Reference page closes and the Request's detail page re-opens. The attached Request is listed in the References section.

9. Click **Save.**

   The Request is saved as a Reference and the Request's detail page is closed.

Note

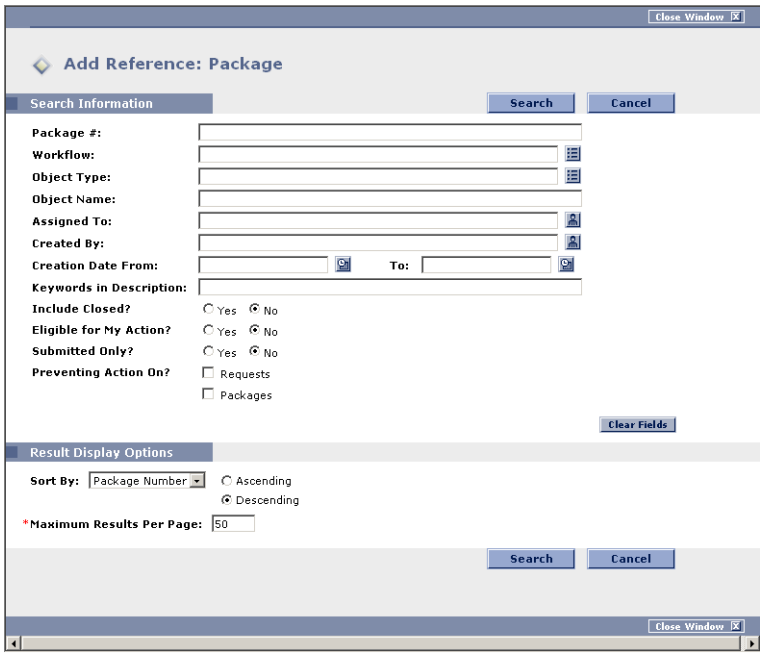
A new Request can be created from a Request's References section and attached to the current Request. See *"Creating a Request from the References Section"* on page 26 for detailed instructions.

Attaching Packages

To attach a Package to a Request:

1. Open the Request.
2. Scroll down to the References section.
3. From the New Reference drop down list, select **Package (Existing)**.
4. Click **Add**.

   The Add Reference: Package page opens.



5. Enter the search criteria for the Package.

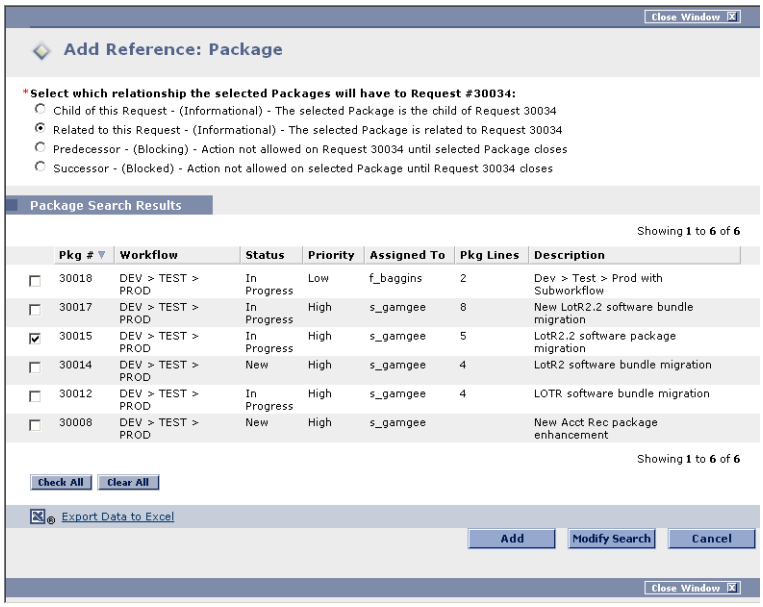
   To search for the Request:

   a. In the Search Information section, enter search criteria.

   b. (Optional) In the Result Display Options section, enter the display options.

   c. Click **Search**.

The page refreshes with the Package(s) matching the search criteria. A list of relationship types is included on the page.



6. Select the type of relationship between the Request and its reference.

   Check one of the radio buttons. See *Table 4-2 on page 45* for a description of the relationships.

7. Select the Package to reference.

   More than one reference can be selected by checking more than one check box.

8. Click **Add**.

   The Add Reference page closes and the Request's detail page re-opens. The attached Package is listed in the References section.

9. Click **Save.**

   The attached Package is saved as a Reference and the Request's detail page is closed.

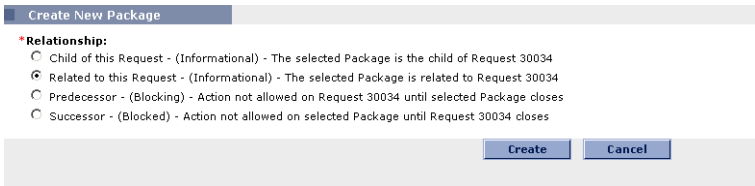
Creating a New Package

A new Package can be created from a Request's References section and attached to the current Request.

To create a new Package from a Request's References section:

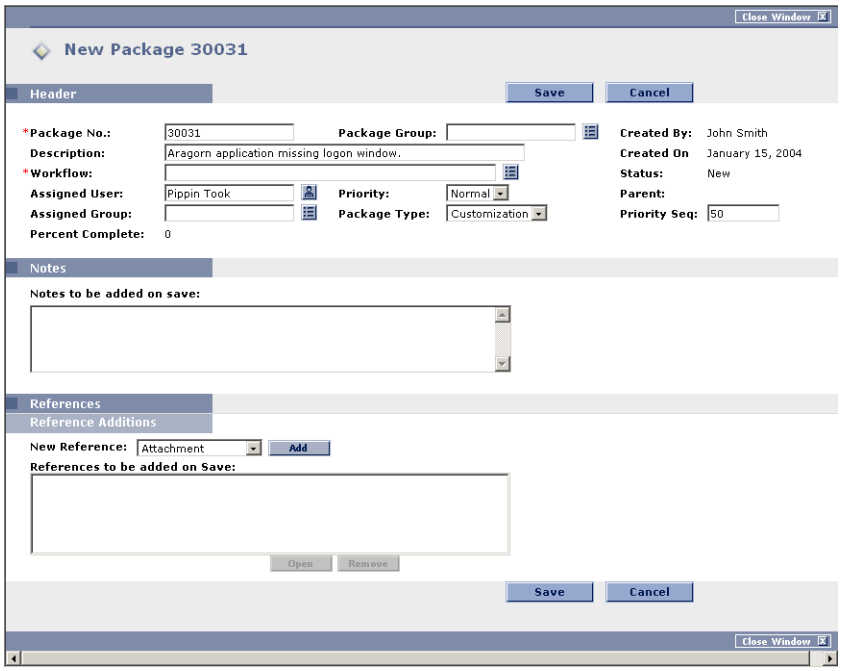
1. Open the Request.
2. Scroll down to the References section.
3. From the New Reference drop down list, select **Package (New)**.
4. Click **Add**.

   The Create New Package page opens.



5. Select a Relationship by clicking the appropriate radio button.
6. Click **Create**.

   The page refreshes to display the New Package page. Matching header information is defaulted in the Package page, such as Description, Priority, and Package Type.



7. Enter any additional Header or Notes information.

8. Click **Save**.

   The New Package page closes and the new Package is displayed in the Request's Reference section.

Note

Package Lines can not be added using the standard interface. Package Lines must be added using the Workbench. See Processing Packages (Change Management) for details.

Attaching Releases

To attach Releases from a Request's References section:

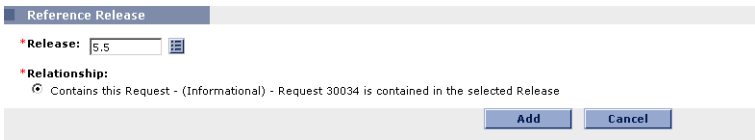
1. Open the Request.

2. Scroll down to the References section.

3. From the New Reference drop down list, select **Release**.

4. Click **Add**.

   The Reference Release page opens.



5. In Release, select the Release to reference.

6. Click **Add**.

   The References section in the Request's detail page is returned. The newly attached Release is listed in the References section.

7. Click **Save.**

   The Release is saved as a Reference and the Request's detail page closes.

Attaching Projects

To attach Projects from a Request's References section:

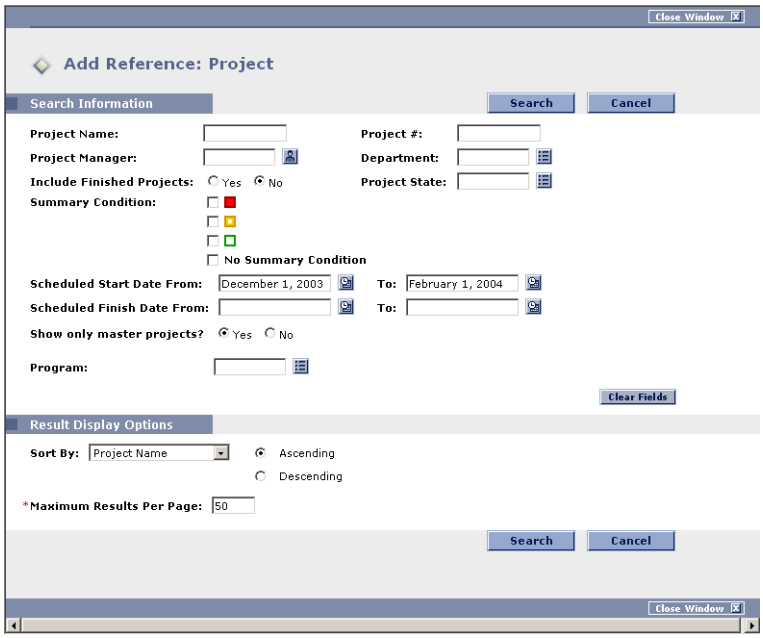
1. Open the Request.

2. Scroll down to the References section.

3. From the New Reference drop down list, select **Project**.

4. Click **Add**.

   The Add Reference: Project page opens.



5. Search for a Project to add as a Reference.

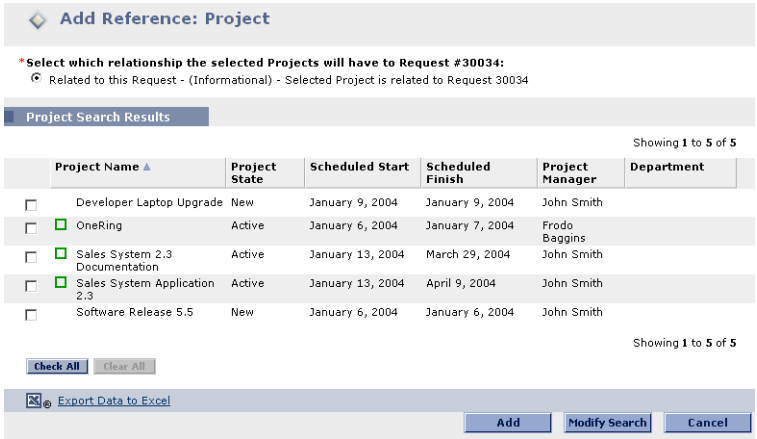
6. To search for a Project:

   a. In the Search Information section, enter the search criteria.

   b. (Optional) In the Result Display Options section, enter the display options.

   c. Click **Search**.

      The page refreshes with the Project(s) that match the search criteria. A list of relationship types is included.



7. Select the Project to reference.

   More than one reference can be selected by checking more than one check box.

8. Click **Add**.

   Return to the References section in the Request's detail page. The newly attached Project is listed in the References section.

9. Click **Save.**

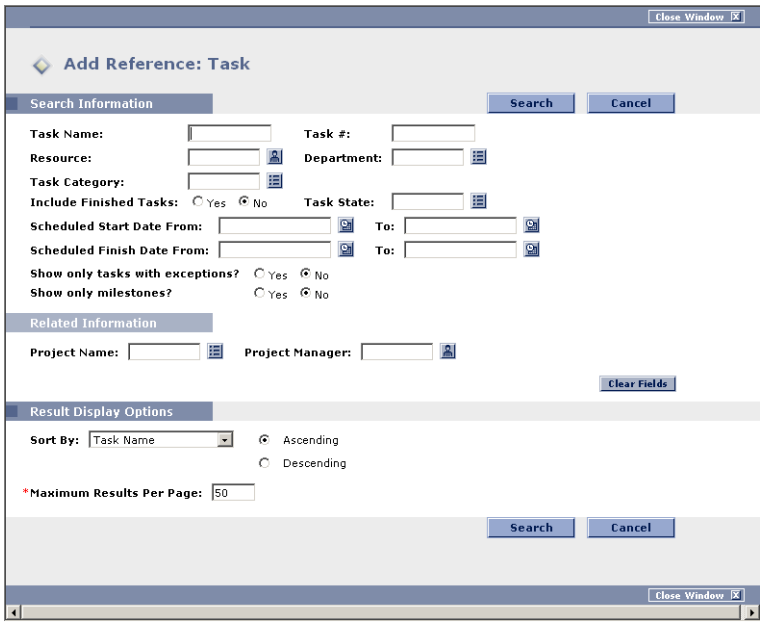
   The attached Project is saved as a Reference and the Request's detail page is closed.

Attaching Tasks

To attach Tasks from a Request's References section:

1. Open the Request.
2. Scroll down to the References section.
3. From the New Reference drop down list, select **Task**.
4. Click **Add**.

   The Add Reference: Task page opens.



5. Search for the Task to add as a Reference.

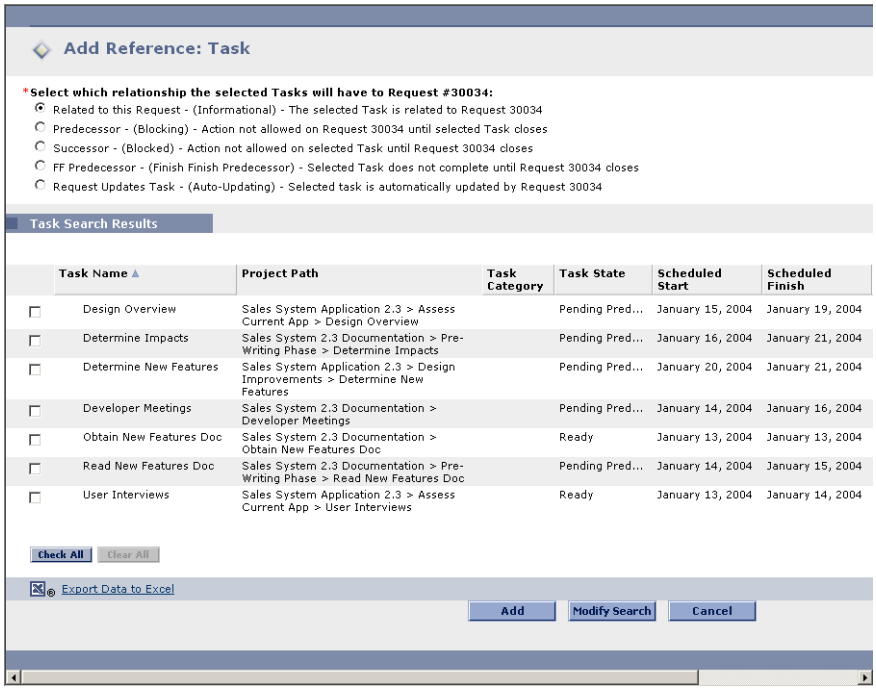
   To search for a Task:

   a. In the Search Information section, enter the search criteria.

   b. (Optional) In the Result Display Options section, enter the display options.

   c. Click **Search**.

      The page refreshes with the Task(s) that match the search criteria. A list of relationship types is included.



6. Select the type of relationship to assign between the Request and its reference by clicking one of the radio buttons.

   See *Table 4-2 on page 45* for a description of the various relationships that can be assigned.

7. Select the Task to reference.

   Select more than one reference by checking more than one check box.

8. Click **Add**.

   The References section in the Request's detail page is returned. The newly attached Task is listed in the References section.

9. Click **Save.**

   The attached Task is saved as a Reference and the Request's detail page is closed.

Referencing a URL in Demand Management

To add a URL as a Reference:

1. Open the Request.
2. Scroll down to the References section.
3. From the New Reference drop down list, select **URL**.
4. Click **Add**.

   The Reference URL page opens.

5. In URL, enter the URL.
6. In Description, enter a description.
7. Click **OK** to add the specified URL as a Reference.
8. The referenced URL appears in the **References to be added on Save** list on the Request's detail page.

The Reference has not been added yet.

9. Click **Save**.

   The Reference is added to the Request.

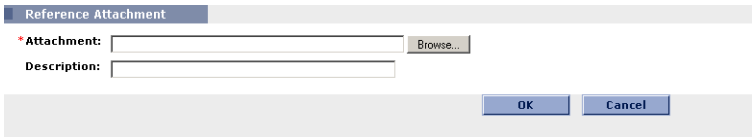
Referencing an Attachment in Demand Management

To add an attachment as a Reference:

1. Open the Request.

2. Scroll down to the References section.
3. From the New Reference drop down list, select **Attachment**.
4. Click **Add**.

   The Reference Attachment page opens.



5. In Attachment, click **Browse** to locate and select the required file from your local machine.
6. In Description, enter a description.
7. Click **OK** to add the selected Attachment as a Reference.
8. The referenced Attachment appears in the References to be added on Save list on the Request's detail page.

Note

The Reference has not been added yet.

9. Click **Save**.

   The Attachment is added to the Request.

Valid References

The valid References for a Request are listed in *Table 4-1*.

Table 4-1. Valid References in the Reference tab

Type	Description
Attachment	Attach a file from a local machine to the current Request. The attached file is copied to the server and can then be accessed by other users. This feature is particularly helpful when you need to reference a document that is not already Web accessible.

Table 4-1. Valid References in the Reference tab [continued]

Type	Description
Package (Existing)	Reference existing Packages directly from the **Reference** tab.
Package (New)	New Packages can also be created from a Request in the **References** tab. Also, if configured as part of the current Workflow, you can spawn a Package from a step in the Request's Workflow. When this happens, a reference to that Package is automatically generated, establishing a two-way link between the Request and the referenced Package.
Project	Reference a Project in Mercury Project Management.
Release	Associate a Request with a Release by referencing the Release name.
Request (Existing)	Reference other Requests directly from the **Reference** tab.
Request (New)	New Requests can be created from an existing Request in the **References** tab. Also, if configured as part of the Demand Management Workflow, you can spawn a Request from a Request. When this happens, a reference to that Request is automatically generated, establishing a two-way link between the Requests.
Task	Reference a Task in a Mercury Project Management.
URL	Reference URLs from a Package. Once attached, click on the Web address to open the document in your Web browser. The document must be in a MIME format recognized by the Web browser (Word, Excel, etc.) Use URLs to include more detailed information than what is included in the Package notes, such as a screenshot for a Bug or a report.

Reference Dependency Relationships

The relationships between a Request and a Reference are listed in *Table 4-2*.

Table 4-2. Reference Relationships

Entity	Relationships	Description
Attachment	Standard Attachment interaction	The attachment is related to this Request.
Packages	Child of this Request	(Informational) - The selected Package is the child of the Request.
	Related to this Request	(Informational) - The selected Package is related to the Request.
	Predecessor	(Blocking) - Action is not allowed on the Request until the referenced Package closes.
	Successor	(Blocking) - Action is not allowed on the referenced Package until the Request closes.
Projects	Related to This Request	(Informational) Selected Project is related to this Request.
Releases	Contains This Package	The Request is contained in the selected Release.
Requests	Duplicate Request	(Informational) The referenced Request is a duplicate of the Request.
	Original Duplicate Requests	(Informational) The referenced Request is the original of the two duplicate Requests.
	Parent of this Request	(Informational) The referenced Request is the parent of the Request.
	Child of this Request	(Informational) The referenced Request is the child of the Request.
	Related to this Request	(Informational) Referenced Request is related to this Request.
	Predecessor	(Blocking) Action not allowed on this Request until the referenced Request closes.
	Successor	(Blocking) Action not allowed on the referenced Request until this Request closes.
Tasks	Related to This Request	(Informational) The referenced Task is related to this Request.
	Predecessor	(Blocking) Action not allowed on this Request until the referenced Task closes.
	Successor	(Blocking) Action not allowed on the referenced Task until this Request closes.
	FF Predecessor (Finish Finish Predecessor)	(Blocking) The referenced Task does not complete until the Request closes.
	Request Updates Task	(Auto-updating) The referenced Task is automatically updated by the Request.

Table 4-2. Reference Relationships [continued]

Entity	Relationships	Description
URL	Standard URL interaction	(Informational) The URL is related to this Request.

Saving an Un-Submitted Request

Mercury ITG Center can be configured to save an un-submitted Request. This feature requires the application administrator to alter a server configuration parameter. Enabling this feature might not be desirable for your business situation. Contact the application administrator for help with this setting.

The server parameter used to enable this feature is ALLOW_SAVE_REQUEST_DRAFT.

Adding and Editing Contacts

Users belonging to appropriate Security Groups (Mercury Demand Management Contact Manager and User Manager) can add or edit a Contact using the Contact Workbench.

This section covers the following topics:

- *Adding a Contact*
- *Editing an Existing Contact*

Adding a Contact

To add a new Contact:

1. From the Mercury ITG Menu bar, select **Administration > Open Workbench**.

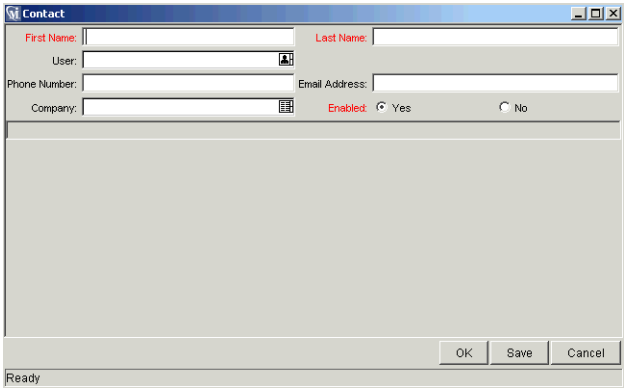
   The Workbench opens.

2. From the Shortcut bar, click **Demand Mgmt > Contacts**.

   The Contact Workbench window opens.

3. Click **New Contact**.

   The Contact window opens.



4. In the top portion of the window, enter the standard contact information.

5. This includes entering the information described in the following table:

Field / Button	Description
Username	The Mercury ITG Username of the Contact. This field is populated from the **KNTA - User Id - All** Validation. The values in this field cannot be edited by the user through this window.
Company	The company employing the Contact. This field is populated from **CRT - Company** Validation. The values in this field cannot be edited by the user through this window. Users should select a company from the list or contact the Administrator to alter the field values.

6. In the lower portion of the window, enter any additional information that has been configured for your site.

   This additional information is configured by an application administrator using the Mercury ITG User Data functionality. Contact User Data information is highly configurable and can be customized to capture contact information related to specific business requirements. For information on using User Data functionality, see *Configuring a Request Resolution System*.

7. In Enabled, check **Yes** to include this Contact in a list of available Contacts.

8. Click **OK**.

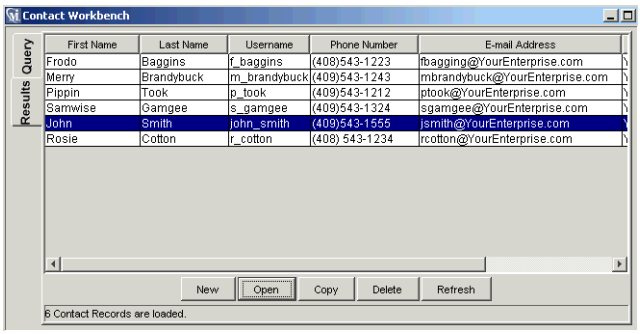
   This Contact can now be used in the Contact fields in the Request header.

Editing an Existing Contact

To edit an existing Contact:

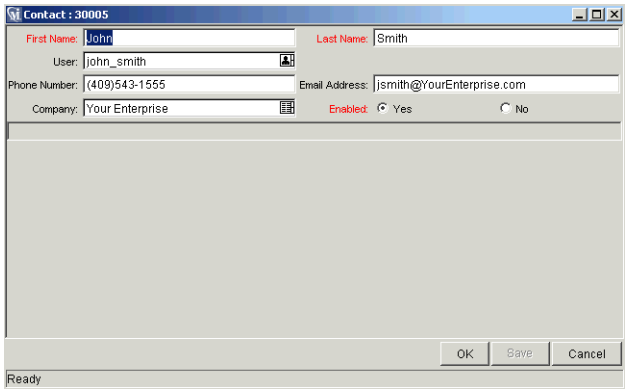
1. Open the Contact Workbench window.
2. Entering search criteria in the appropriate field (such as First Name, Last Name or Username).
3. Click **List**.

   The results from the search are displayed in the **Results** tab.



4. Select the user.
5. Click **Open**.

   The Contact window opens with the user's information loaded.



6. Make the required changes.
7. Click **OK**.

   The edited Contact information is saved.

Chapter

5

Viewing Request Status and Details

This chapter discusses the ways a user can locate and view Requests. Once a Request has been created, it begins moving towards completion along its designated Workflow. Mercury Demand Management users can search for and view a Request at any point in the Request's lifecycle, provided they have the appropriate permissions.

This chapter covers the following topics:

- *Searching for Requests*
- *Viewing Request Information*
- *Viewing the Request or Request Field Help*
- *Printing a Request*
- *Using Dashboard Portlets to View Request Information*

Searching for Requests

Once a Request is created, it can be viewed and updated. The procedures in this section detail how to search for an existing Request using the standard interface.

This section covers the following topics:

- *Searching for a Specific Request*
- *Using Simple Searches*
- *Using Advanced Searches*
- *Saving your Searches*

Searching for a Specific Request

If the number of the Request is known, you can enter it into the View Details for Request # field at the top of the Request Search page.

To search for a specific Request:

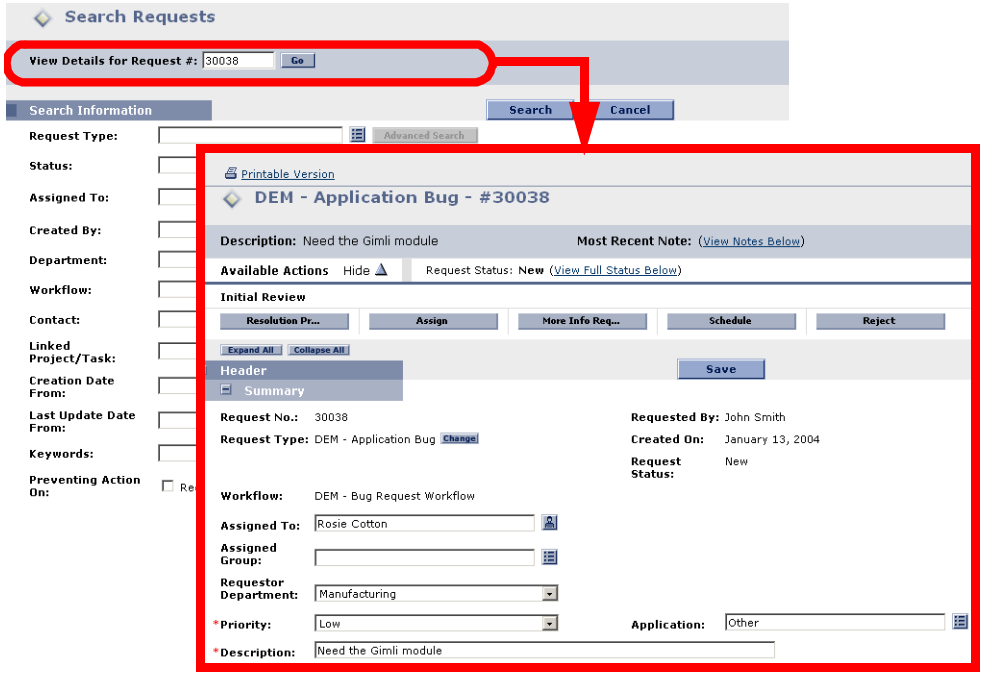
1. From the menu bar, select **Search > Request**.

   The Request Search page opens.

2. In View Details for Request #, enter the Request number.

3. Click **Go**.

   The Request's detail page opens.



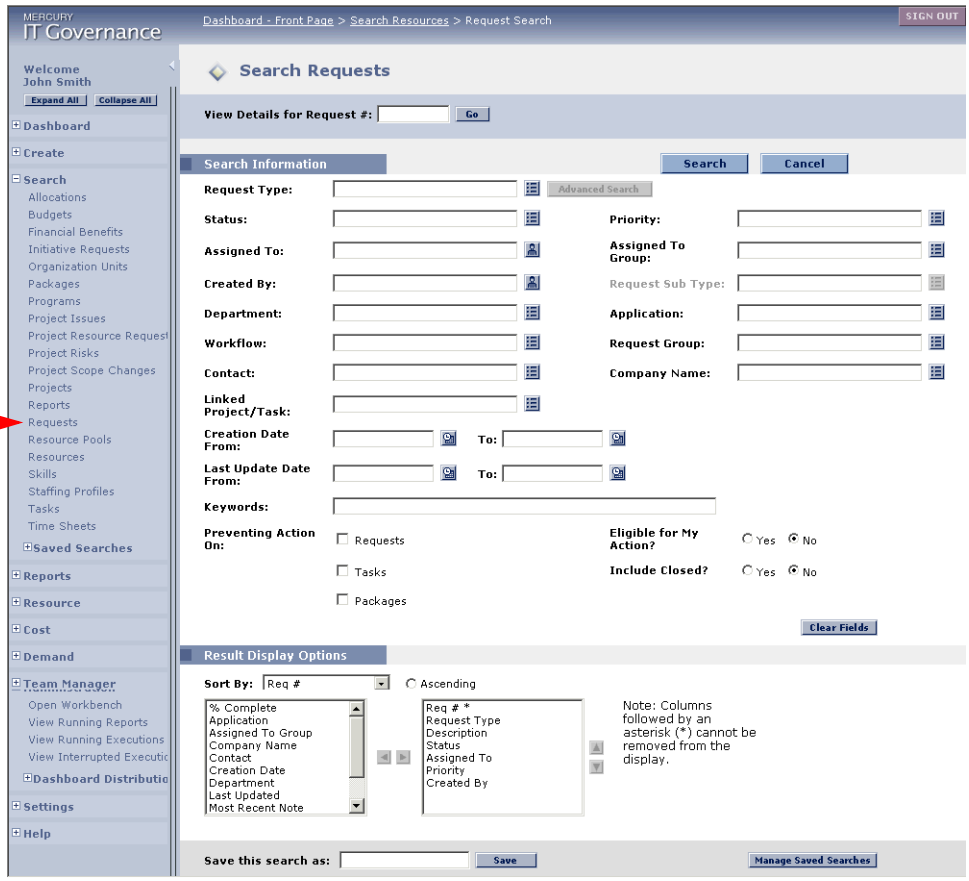
Using Simple Searches

To locate a Request:

1. From the menu bar, select **Search > Requests**.

   The Search Requests page opens.

Click Requests to open the Search Request page.



2. In the Search Information section, enter the search criteria for the Request.

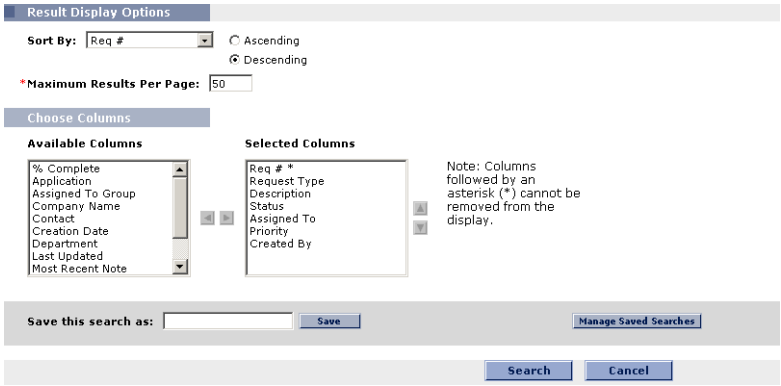
   You can limit the maximum number of results in Maximum Requests Displayed. In general, search for a Request based on any parameters appearing in the Requests Search page, such as Request Number, Request Type, or Created By.

3. (Optional) In the Results Display Options section, enter the display options for the Request Search Results page.

   The Choose Columns section allows you to select which columns to display. All columns in Selected Columns will be shown in the Request Search Results page.

   - Use the side-to-side buttons ◀ ▶ to move entries between Available Columns and Selected Columns.
   - Use the up-and-down buttons ▲ ▼ to order the entries in Selected Columns.

- The Request # and any other entries marked with an asterisk (*) cannot be removed from Selected Columns.



4. (Optional) Save the search criteria for future searches.

   To save the search criteria:

   a. In Save this search as, enter a unique name for the search query.

   b. Click **Save**.

      The search is saved. Entering a non-unique name will prompt you to replace the existing saved search query of the same name. See *"Saving your Searches"* on page 56 for more information about saving searches.

5. Click **Search**.

   The Request Search Results page opens. The Request Search Results page displays all of the Requests matching the search criteria. The Column Sort Icon ( ) denotes the column on which the data is sorted and the sort direction (ascending or descending). Clicking the header with the Column Sort Icon changes the order of the sort, such as from ascending to descending. To select a different column to sort on, click another column header.

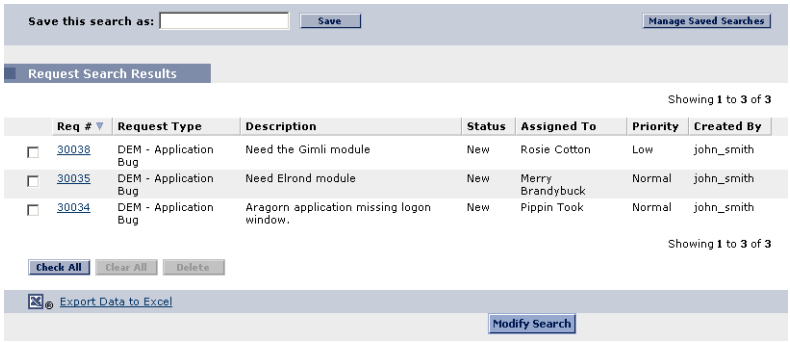
Note

The sort criteria is applied across the whole set of returned values, not just those values displayed on the active page.

If the search did not yield the desired results, click **Modify Search** to return to the Request Search page. The search fields contain the existing parameters, allowing you to modify the search without having to enter everything a second time.

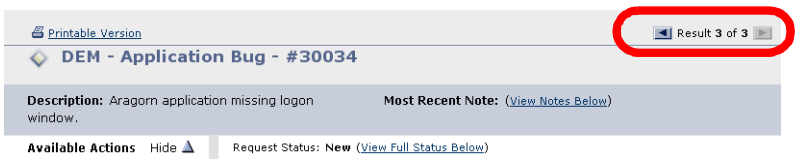
Tip

Export the search results into a Microsoft Excel spreadsheet by clicking the **Export Data to Excel** link at the bottom of the Request Search Results page.



6. Click on the Request Number.

   The Request's detail page opens. To move from one Request to another, use the forward and backward navigation buttons.



Using Advanced Searches

Each Request Type contains fields specific to that Request Type. The Advanced Search functionality allows you to perform searches using any field contained on the selected Request Type.

If searching for Requests of a particular Request Type, fill in the Request Type field and click **Advanced Search**. The Advanced Search page opens, containing fields specific to the desired Request Type.

If searching for Requests from several Request Types, fill in the Request Type field and click **Advanced Search**. The Advanced Search page opens, containing

any field that all the selected Request Types share. The search results will be all Requests of the selected types that have the entered values in the shared fields.

When the Advanced Search page opens, the selection of Request fields shown in the search results (the values in the Choose Columns) fields might change from the Search page. This results when a selected Request Type is configured to display a different set of columns. To override the default columns, edit the Available Columns and Selected Columns fields.

Saving your Searches

Demand Management allows search queries to be saved, organized, and reused. This eliminates the need to re-enter search criteria for any searches performed on a regular basis. A search query can be saved from the following:

- A Search Requests page.
- An Advanced Search Requests page.
- A Request Search Results page.

Access the Manage Your Saved Searches page from any of these pages by clicking **Manage Saved Searches** or selecting **Search > Saved Searches > Manage Saved Searches** from the menu. The Manage Your Saved Searches page lets you create categories for organizing saved searches. See *"Organizing Saved Searches"* on page 57 for more information on organizing saved searches.

To save search queries:

1. From the menu bar, select **Search > Request**.

   The Request Search page opens.

2. In the Search Information section, enter the search criteria for the Request.

3. (Optional) In the Results Display Options section, enter the display options for the Request Search Results page.

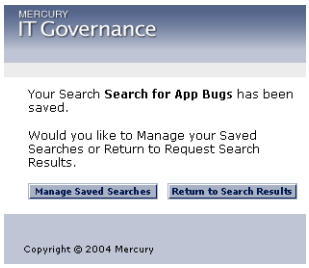
4. In Save this search as, enter a unique name for the search query.

   The search query name can be entered:

- In the Search Results page or Advanced Search Results page before performing the search.
- In the Request Search Results page after performing the search.

5. Click **Save**.

   The Save Search confirmation page opens.



6. From the Save Search confirmation page, click one of the following:

   - **Return to Search Results**
     Return to the page where the search was initiated.
   - **Managed Saved Searches**
     Go to the Manage Your Saved Searches page.

   The search query is saved under the default No Category section of the Manage Your Saved Searches page.

Organizing Saved Searches

Saved searches can be organized under different categories created on the Manage Your Saved Searches page.

To organize saved searches:

1. From the menu bar, select **Search > Request**.

   The Request Search page opens.

2. Click **Manage Saved Searches**.

   The Manage Your Saved Searches page opens.

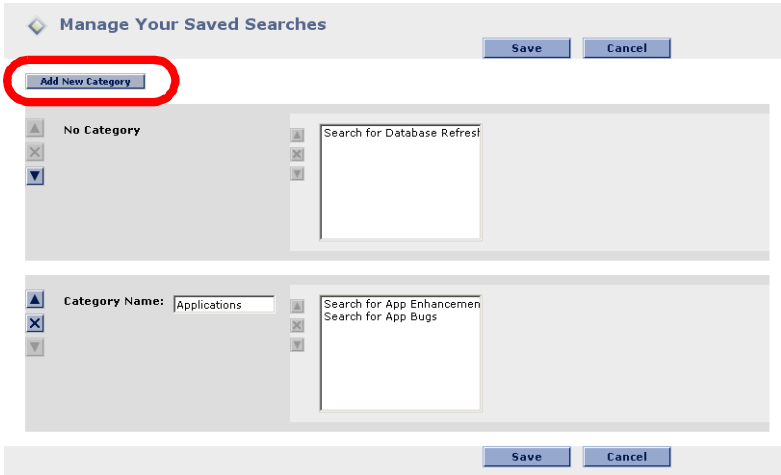
   By default, the saved searches are listed under No Category until moved into the appropriate category.

3. Create a new category.

   To create a new category:

   a. Click **Add New Category**.

      A new Category Name area displays on the page.



   b. In Category Name, enter a unique name for the category.

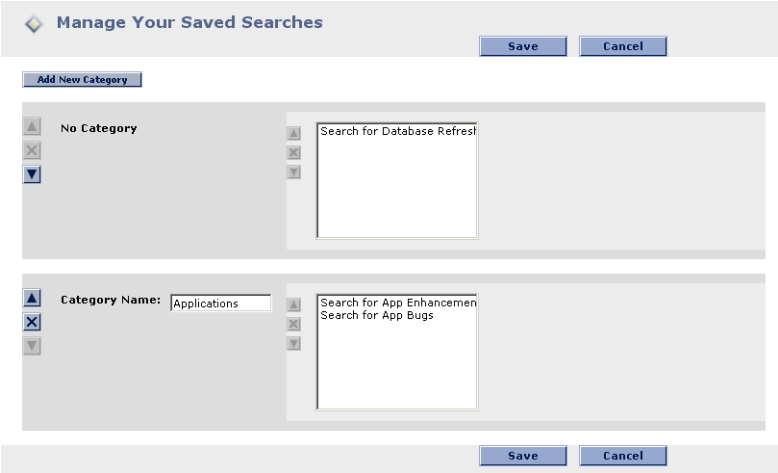
      The **Up/Down** directional arrows and **Delete** button to the left of the Category Name let you change the position of the category on the page or delete the category from the page.

      The **Up/Down** directional arrows and Delete button to the left of the saved searches let you change the position of the searches within the Category or delete the saved search from the Category. You can also move searches between Categories.

Change the name of the Category by editing it in Category Name. However, the names of the saved searches cannot be changed.

4. When the Manage Your Saved Searches page is set up correctly, click **Save**.

The saved searches shown in the following example are organized into Dev Requests and My Requests categories. The Manage Your Saved Searches page is shown below after the Categories have been created and the appropriate saved searches have been moved into those categories.



Running Saved Searches

To run a saved search:

1. From the menu bar, select **Search > Saved Searches > saved search**.

   The saved search runs.

Example

This example details how to run the saved search, **Critical Requests**, located in the **Dev Request** category. From the Menu bar select:

Searches > Saved Searches > Dev Requests > Critical Requests

Viewing Request Information

In addition to viewing the information displayed in a Request's detail page, users can view additional information concerning their Requests.

This section covers the following topics:

- *Viewing the Workflow Step Information URL*
- *Viewing the Graphical View of the Request*
- *Viewing the % Complete*
- *Viewing the Approval Details of a Step*
- *Viewing the Members of a Security Group for a Step*
- *Viewing the Request Transaction History*
- *Viewing the Request Execution Log*

Viewing the Workflow Step Information URL

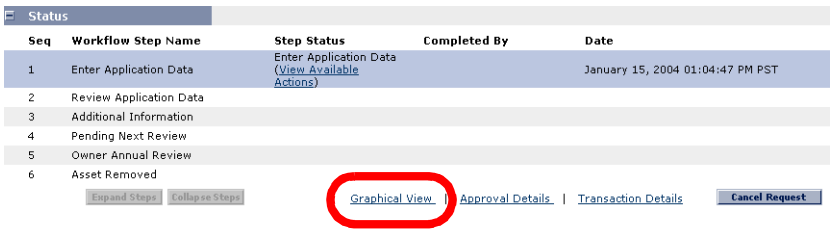
Each Workflow Step can be associated with a Web address (URL) during Workflow configuration. This can help provide more instructions or background information on the specific step. If a URL is associated with the Workflow Step, the Workflow Step Name appears as a hyperlink. Click the link to display more information concerning the step.

Viewing the Graphical View of the Request

To graphically view a Request's process and its status:

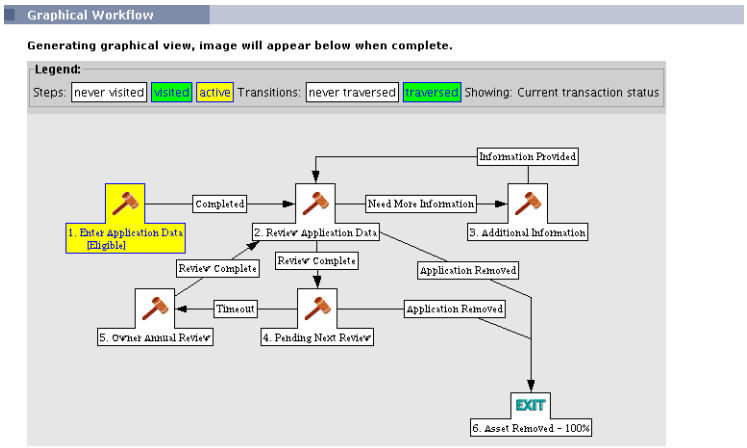
1. Open the Request.

2. Scroll down to the Status section.



3. Click **Graphical View**.

   The Graphical Workflow page for this Request opens.



4. Click **Done** to return to the Request's detail page.

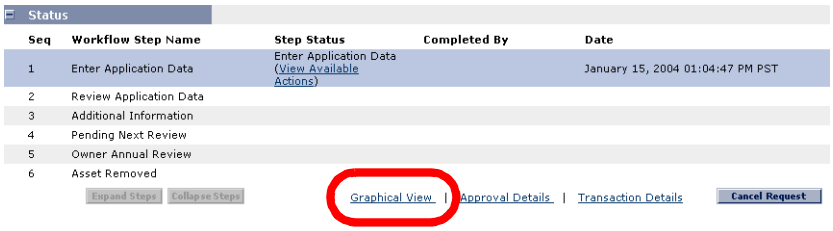
Viewing the % Complete

Workflows can be configured to include a Current % Complete value. A Current % Complete value can be assigned to individual Workflow steps. As the Request moves along the Workflow, the percent completed is updated according to each step's configured value.

To view the percent completed information for a Request:

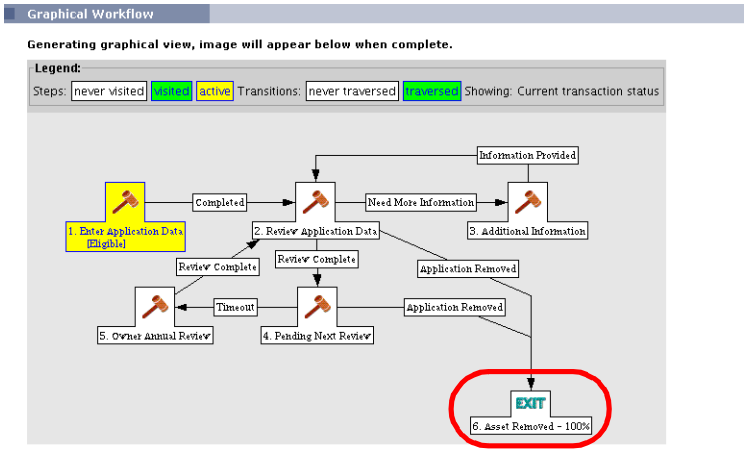
1. Open the Request.

2. Scroll down to the Status section.



3. Click **Graphical View**.

   The Graphical Workflow page for this Request opens.



The Graphical Workflow page displays the Request's Workflow. The Current % Complete value for each Workflow Step also appears.

4. Click **OK** to return to the Request's detail page.

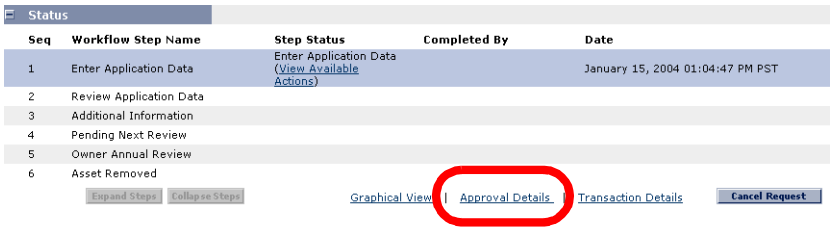
Viewing the Approval Details of a Step

Some Workflow Steps can be configured to require approvals from more than one user.

To view the approval details of a Workflow Step:

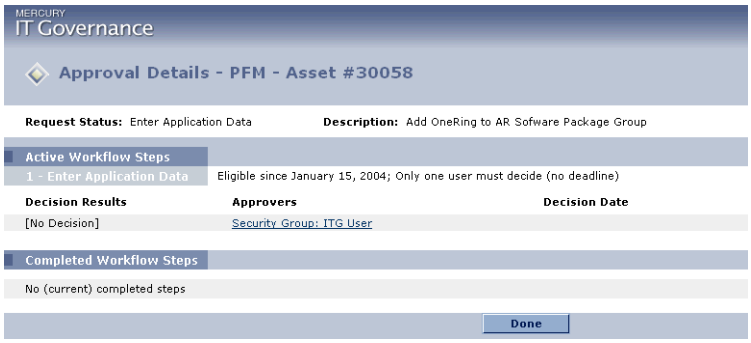
1. Open the Request.

2. Scroll down to the Status section.



3. Click the **Approval Details** link.

   The Approval Details page opens.



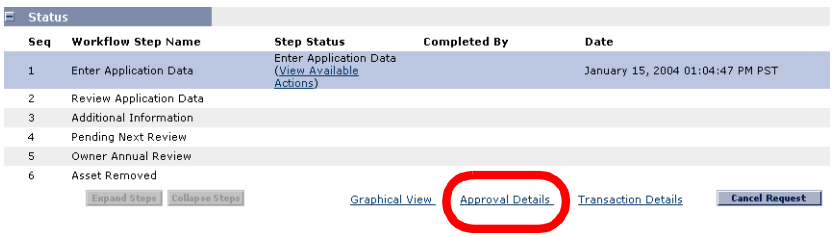
4. Click **Done** to return to the Request's detail page.

Viewing the Members of a Security Group for a Step

To view the members of a Security Group who can act on a particular step:

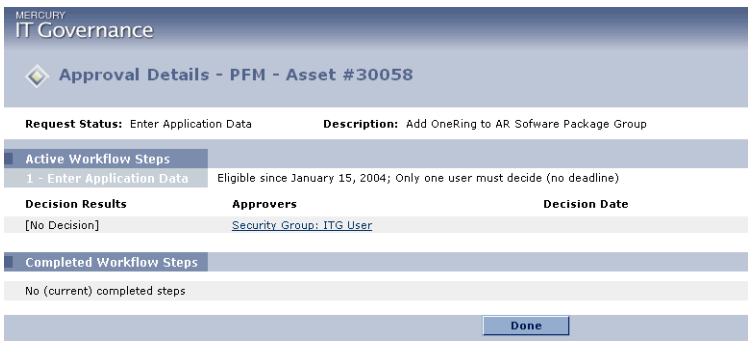
1. Open the Request.

2. Scroll down to the Status section.



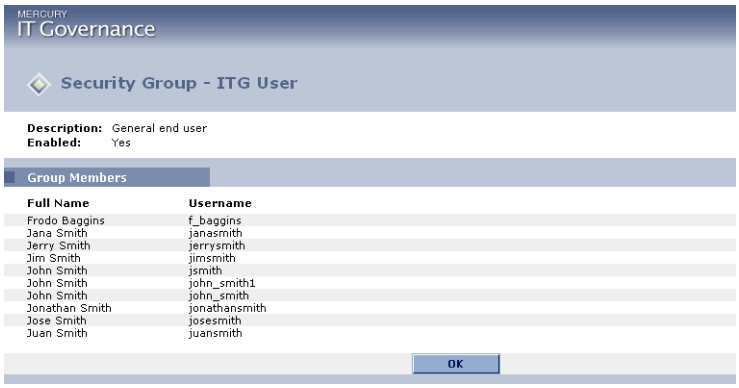
3. Click the **Approval Details** link.

   The Approval Details page opens.



4. Click the name of the Security Group to view.

   The Security Group Members page opens. This page opens the Security Group page in a new browser window and includes the names of all its members.

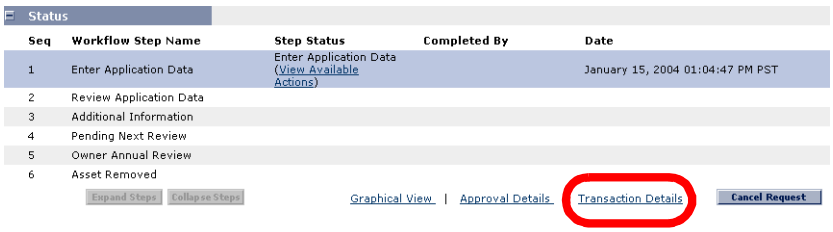


Viewing the Request Transaction History

To view the Request Transaction History for a particular Request:

1. Open the Request.

2. Scroll down to the Status section.



3. Click the **Transaction Details** link.

   The Request Transaction History page opens.

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IT Governance

PFM - Asset #30058

Transaction Details

Date	Username	Step	Workflow Step Name	Step Status	Results	Error	Error Message
January 15, 2004 01:04 PM PST	john_smith	1	Enter Application Data	Eligible			
January 15, 2004 01:15 PM PST	john_smith	1	Enter Application Data	Complete	Completed		
January 15, 2004 01:15 PM PST	john_smith	2	Review Application Data	Eligible			
January 15, 2004 01:16 PM PST	john_smith	2	Review Application Data	Complete	Review Complete		
January 15, 2004 01:16 PM PST	john_smith	4	Pending Next Review	Eligible			

Done

4. Click **Done** to return to the Request's detail page.

Viewing the Request Execution Log

It is possible to view the details of the execution of a particular Request by running the Request Execution Log.

To view the Request Execution Log for a particular Request:

1. Open the Request.

2. Scroll down to the Status section.

Status

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Assign Project Manager	Completed	Admin User	February 6, 2004 06:37:04 PM PST
2	Detailed Project Definition	Approved	Admin User	February 6, 2004 06:37:09 PM PST
3	Business Readiness Sign-Off	Approved	Admin User	February 6, 2004 06:37:16 PM PST
4	Requirements	Approved	Admin User	February 6, 2004 06:37:19 PM PST
5	Design	Approved	Admin User	February 6, 2004 06:38:04 PM PST
6	Construct	Approved	Admin User	February 6, 2004 06:38:14 PM PST
7	Test	Approved	Admin User	February 6, 2004 06:38:28 PM PST
8	Deploy	Approved	Admin User	February 6, 2004 06:38:31 PM PST
9	End Of Life Project	Succeeded (log)	Admin User	February 6, 2004 06:38:50 PM PST
10	Create Asset	Create Asset (View Available Actions)		February 6, 2004 06:38:50 PM PST
11	Project Cancelled			
12	Project Completed			

Expand Steps | Collapse Steps | Graphical View | Approval Details | Transaction Details | Cancel Request

3. Click the **log** link.

   The Request Execution Log page opens. From this page, you can view the details of the Request Execution.

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Execution Logs for Batch Execution Logs for Batch 30843 — Execution Log History

Workflow Step Source	Execution -PFM - End Of Life Project
Request Type	PFM - Project
Request	30750
Workflow	PFM - Project
Workflow Step	9 - End Of Life Project
Started	February 6, 2004 06:38:49 PM PST

Hide Debugging Details

```
The following Command Step is not subject to timing out: com.kintana.core.server.execution.CL
"" ""
```

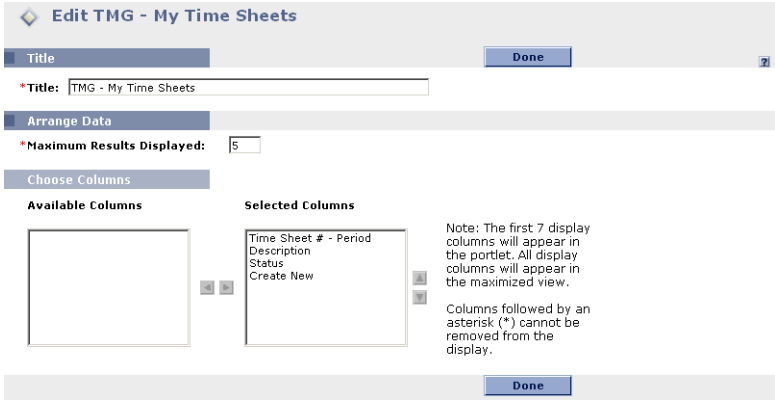
4. Click **Done** to return to the Request's detail page.

Viewing the Request or Request Field Help

Demand Management provides customized help content for Requests. Wherever the help content has been configured (on a field, section, or Request Type), end users can open that help by clicking the associated **Help Content** icon ( ).

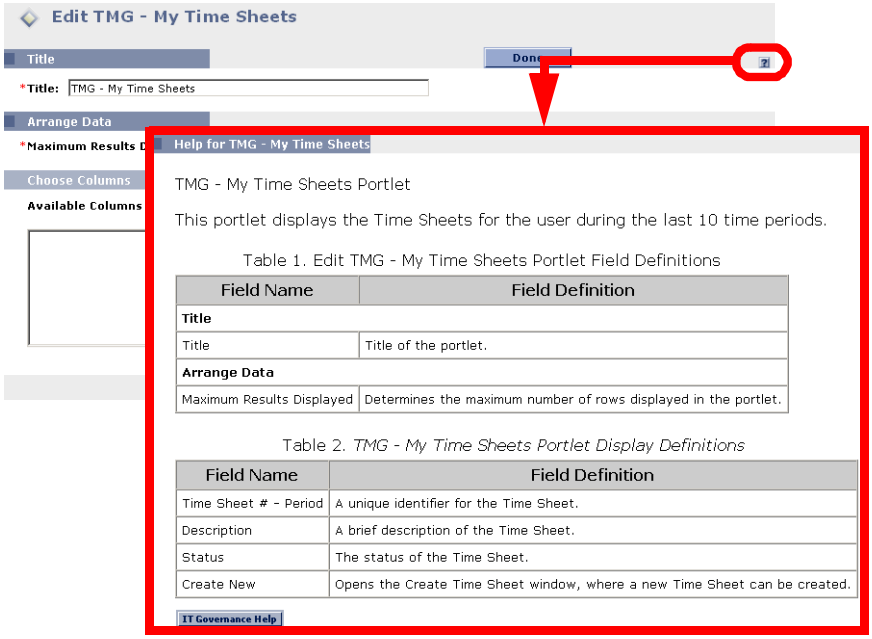
To view the Request or Request field help:

1. Open the Request.



2. Click the **Help Content** icon ( ).

   The Help Content page opens.



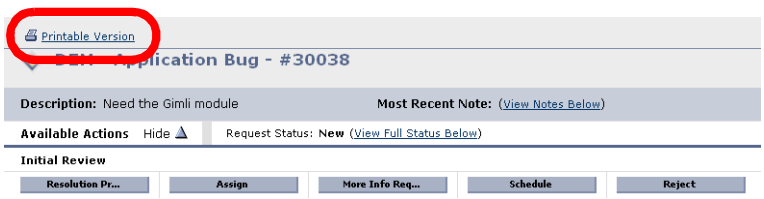
Printing a Request

It is possible to print a Request's detail page by opening the Printable Version page of the Request.

To print a Request:

1. Open the Request.
2. At the top of the Request's detail page, click the Printable Version link.

   A printable version of the Request's detail page opens in a separate page.



3. On the printable version page, click **Print**.

The Request's printable version page is sent to the printer.

Print

DEM - Application Bug - #30038

Description: Need the Gimli module
Most Recent Note:
Available Actions:
Request Status: New
Initial Review: Resolution Provided Request | Assign Request | More Info Required Request | Schedule Request | Reject Request

Header

Summary

Request No.: 30038
Request Type: DEM - Application Bug
Requested By: John Smith
Created On: January 13, 2004
Request Status: New
Workflow: DEM - Bug Request Workflow
Assigned To: Rosie Cotton
Assigned Group:
Requestor Department: Manufacturing
Priority: Low
Application: Other
Description: Need the Gimli module

Details

Problem/Resolution

Problem: Need the One Ring
Business Area Affected: Order Management
Required Date:
Source:
Source Category:
Reproducible:
Steps to Reproduce:
Resolution:
Solution:

Environment

Environment:
Application:
Browser Version:
Apps Responsibility:
Desktop OS:
Apps Username:
OS Version:
Apps Form Name:
Java Version:
DB Version:
Hardware Details:

Analysis

Business Benefit:
Technical Impact:
Est Completion Date:
Scope Change: No
Internal/External:
Vendor Issue #:
Vendor Bug No.:
Assigned Developer:
Percent Complete:
Analysis Details:

Project Information

Project Name:
Project Phase: Build
Project Manager:
Project Team:
Team Lead:
Test Lead:
Requestor Location:
Business Initiative:

Demand Management SLA Fields

SLA Level:
SLA Violation Date:
Service Requested Date:
Service Satisfied Date:

Demand Management Scheduling Fields

Estimated Start Date:
Estimated Effort: 2
Reject Date:
Demand Satisfied Date:

Notes

Status

Step #	Step Name	Status	Acted On By	Acted On
2	Confirm Priority 1 Requests			
3	Initial Review	Initial Review		January 13, 2004 02:21 PM PST
4	Need Info from Requestor			
5	Requestor Sign-off			
6	On Hold			
7	Request Analysis			
8	Requestor Sign-off			
9	Need Info from Requestor			
12	Contact Vendor			
13	Cost Analysis			
14	Cost Approval			
15	Design/Develop			
16	Create Package			
17	Vendor Response			
18	Get Patch			
19	Requestor Review Code Change			
20	Close (Immediate failure)			
21	Close (Immediate success)			
22	Close (Immediate success)			

Note

The printable version of the Request's detail page cannot be edited or updated.

Using Dashboard Portlets to View Request Information

The Dashboard enhances the interaction with business data by providing configurable views into the data. Each licensed product has a number of associated Portlets which can be added to a user's Dashboard.

The Dashboard can be personalized to meet the goals of a variety of users. It can be configured to communicate expectations to all levels of users. The Dashboard can also provide a central location from which managers, executives and participants can view track and update their business activity statuses. Using the Dashboard provides instructions for common Portlet personalization tasks and highlights a few possible Portlet configurations that provide specific advantages related to a variety of business roles.

Tip

The quickest way to locate open Requests is through the Dashboard. For example, the My Requests Portlet can be used to display all of your assigned Requests. The Dashboard features additional Portlets that can help manage Requests. See Using the Dashboard for more detailed information.

Chapter 6
Processing Requests

This chapter details the procedures to track and process Requests. Once a Request has been submitted, it is routed along a defined business process of approvals, decisions and actions.

This chapter covers the following topics:

Request Processing - Data Integrity

Information gathered for a business process is necessary for the Request to reach a point of resolution. While much of the information for a Request might be available at the time of initial entry, there are other pieces of information acquired only after the Request starts processing. Some of this data might be crucial to the resolution of the Request.

In order to make allowances for these requirements, Mercury Demand Management incorporates the concept of conditional behavior for fields. This ensures that the correct information, according to the defined business process, is always obtained.

When a Request is first entered, it might be entered by a non-technical person trying to solve a technical issue. For example, a user might report a problem using a Request Type called Software Bug. At this stage, the field by the name of Estimated Time to Fix is not required and appears as black text.

When the Request proceeds to the next step, it is assigned a Request Status of New. In this step, the person working on the problem is **REQUIRED** to fill in the Estimated Time to Fix field. The (now required) field is displayed with a red asterisk by it and does not allow the technician to advance the Request to the next step of the Workflow until the field is filled in.

Locating In Progress Requests

Demand Management users can locate Requests requiring their attention by:

- *Using Searches*
- *Using Notifications*

Using Searches

Use the Search Requests page to search for Requests. Select **Search > Request** from the Menu bar to access the Search Requests page. See *"Searching for Requests"* on page 51 for details.

Using Notifications

As a Request proceeds through its life, email Notifications can be sent to alert users of pending actions. Notifications can be sent:

- At a specific step in the Request resolution process.
  The logic regarding when emails are sent and the content for each email is defined in the Workflow. For example, Notifications can be sent when a step becomes **Eligible**, alerting specific users that they need to perform an action or decision. They can also be sent after a step is completed to inform assigned users of the specific outcome.
- When a specific field value changes.
  Certain fields on the Request Type can be configured to send a Notification when a field changes to a specific value or any value. The following fields can be configured to send a Notification:

- Company
- Request Group
- Assigned Group
- Priority
- Application
- Assigned To
- Department
- Sub-Type
- Contact Name

Notifications typically instruct the user to review a Request or act on a pending Workflow step. Follow the instructions detailed in the Notification for the appropriate course of action.

The Notification might include a hyper-link to the Request. Enter this URL into a Web browser to proceed to the destination. If you are currently logged onto the Dashboard, the referenced Request opens. If you are not currently running Mercury ITG Center, the logon page opens. After you logon, the referenced Request opens. *Figure 6-1* shows a sample Notification.

Mercury IT Governance

Notified Users:	dellsworth@merc-int.com
Status Change For Request #:	30001
Description:	Value in Token autocomplete list is different between workbench and standard interface
Priority:	Critical
Workflow:	kde - Bug Request Workflow
Workflow Step:	1. Priority Router
Old Status:	
New Status:	Eligible

Figure 6-1 Sample Notification

Updating Request Information

In Mercury Demand Management, once a Request has been created it can be updated.

This section covers the following topics:

- *Updating the Request Header*
- *Updating Request Details and Notes*
- *Updating Request References*
- *Updating Request Status*

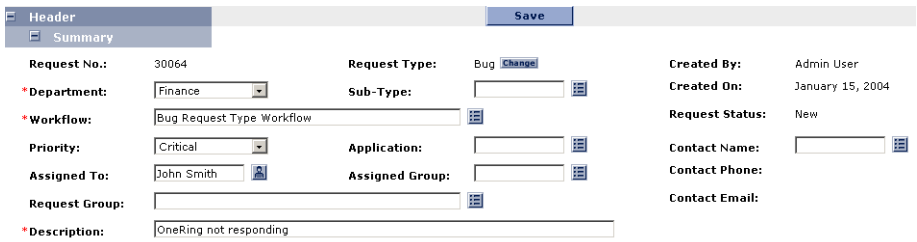
Note

Demand Management takes into account the status of the Request and the permissions granted to the user. For Power Users, all fields are editable and Workflow Step transitions can be made. Standard Users can only add References, Notes, and make Workflow Step transitions. Whether a user can edit a Request depends on the security model for the Workflow and the Request Type. See Configuring a Request Resolution System for details.

Updating the Request Header

To update header information for an existing Request:

1. Open the Request.
2. Scroll down to the Request Header section.



3. Enter any new Request Header field information.

Note

For information concerning a specific field, click the **Help Content** icon ( ) next to the field.

4. Click **Save** to save the changes.

Changing the Request Type

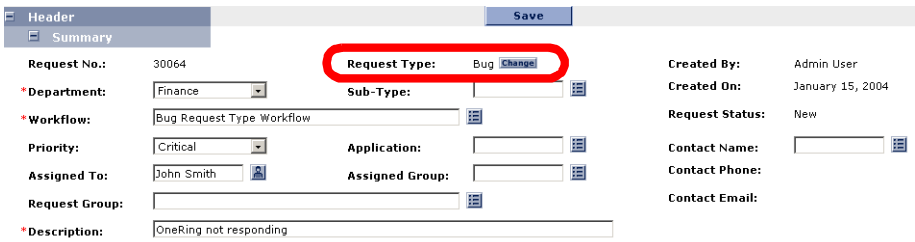
Changing a Request's Request Type can change which fields are associated with that Request. To reduce data entry when the Request Type is changed, Demand Management attempts to map the fields from the original Request Type to the fields of the new Request Type. When a match is found, the value in the original field is copied to the new field for the new Request Type. Any new fields remain blank during the change in Request Type.

Information associated with the old Request Type is not lost. A copy of the Request, before the Request Type was changed, is archived for reporting and auditing purposes.

To change the Request Type of an existing Request:

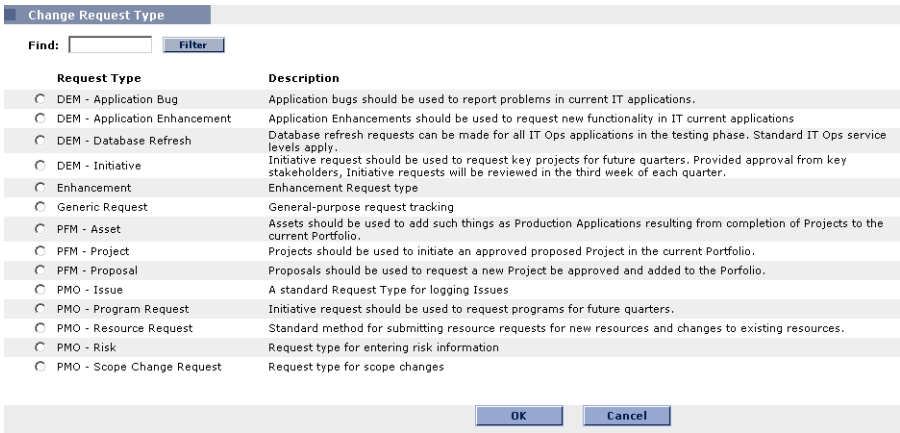
1. Open the Request.

2. Scroll down to the Request Header section.



3. Click **Change**, located next to Request Type.

   The Change Request Type page opens.



4. Select the new Request Type by checking the appropriate radio button.

   If there is a large number of Request Types present in the system, enter filtering criteria in Find and click **Filter**.

5. Click **OK.**

   The change to the Request Type is saved. Click **Cancel** to return to the Request's detail page without changing the Request Type.

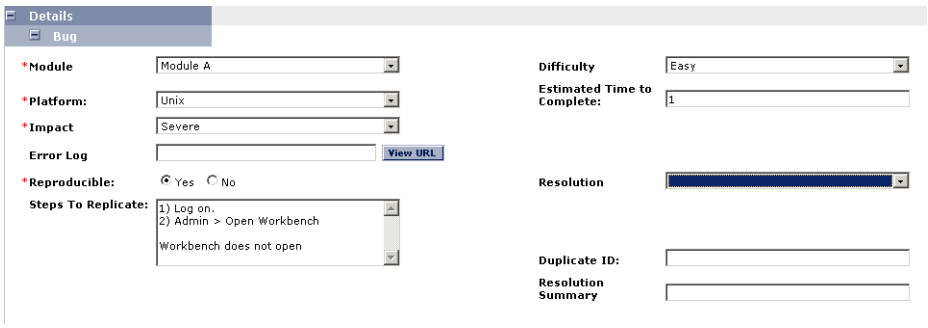
Updating Request Details and Notes

The ability to view and edit fields in a Request depend on the Request's security set up. See Configuring a Request Resolution System for details.

To update the details for an existing Request:

1. Open the Request.

2. Scroll down to the Details section.

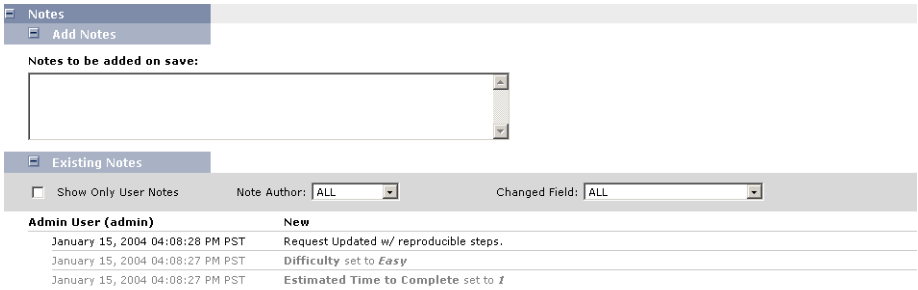


3. Enter any new Details information.

4. Scroll down to the Notes section.

5. Open the Add Notes section.

   Up to 32K of information can be entered per Request. To view existing notes, open **Existing Notes**. Existing notes are presented in chronological order with the most recent first. Existing notes can also be filtered, using Show Only User Notes and Note Author.



6. Scroll to the bottom of the page.

7. Click **Save**.

   The changes to the Request are saved.

Updating Request References

References can be viewed, modified, and deleted from a Request's detail page.

This section covers the following topics:

- *Viewing a Reference*
- *Changing a Reference*
- *Deleting a Reference*

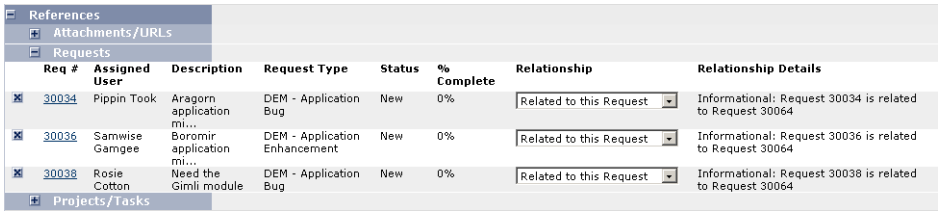
For more detailed information on adding References to a Request, see *"Adding References"* on page 28.

Viewing a Reference

To view a Reference:

1. Open the Request.

2. Scroll down to the References section.



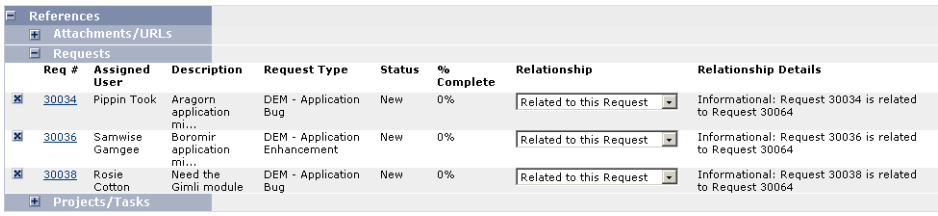
3. Click on the name of the Reference.

   The Reference opens.

Changing a Reference

To modify an existing Reference relationship:

1. Open the Request.
2. Scroll down to the References section.



3. From the Relationship drop down list, select the relationship.
4. Click **Save**.

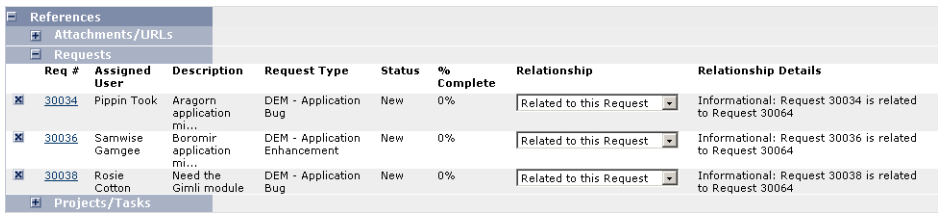
   The changes to the Request are saved.

Deleting a Reference

To delete an existing Reference:

1. Open the Request.
2. Scroll down to the References section.
3. Click the delete button ( ) next to the name of the Reference to be deleted.

   The Reference is deleted.

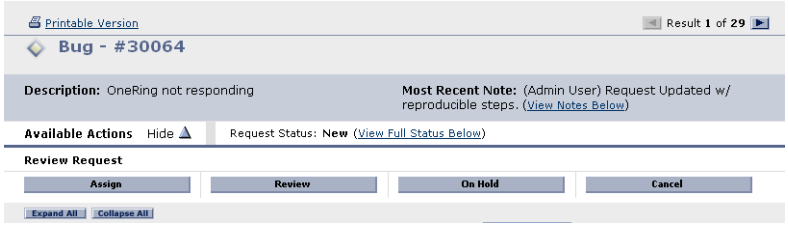


Updating Request Status

To update the status of a particular Request:

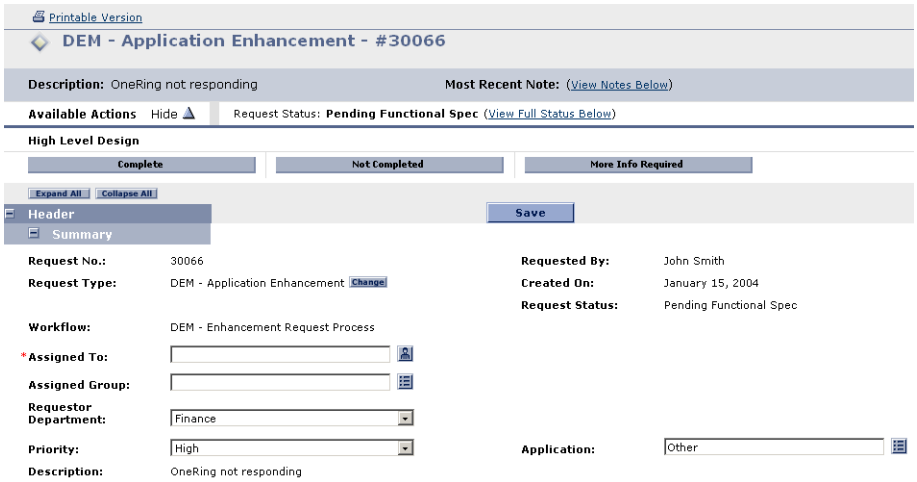
1. Open the Request.

   Any available actions are displayed at the top of the page.



2. Click an action button (for example, **Assign**) to perform the Workflow Step specified.

Depending on the nature of the action, the Workflow Action page might open, presenting more detailed choices. For example, if the Assign transition is selected, you might be required to specify the Assigned To user. In this case, the Assigned To field becomes a required field.



Note

Approval details can be shown for Workflow Steps that require more than one decision, as well as Security Groups that can act on a particular step. For more information, see *"Viewing the Approval Details of a Step"* on page 62.

Subworkflow Steps found within a Workflow are displayed sequentially along with the other Workflow Steps. Subworkflow steps are numbered with additional decimal places corresponding to the level of the Workflow. For example, if Step 3 of a top-level Workflow is a Subworkflow, its steps will be displayed as 3.1, 3.2, 3.3, etc. Similarly, if the second step in that Subworkflow is also a Subworkflow step, its steps will be displayed as 3.2.1, 3.2.2, 3.2.3, etc.

Tip

Workflow Actions can also be viewed from the Status section of the Request's detail page.

Status

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Initial Review	Assign	John Smith	January 15, 2004 04:22:08 PM PST
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design	High Level Design (View Available Actions)		January 15, 2004 04:22:08 PM PST
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			

If the user has the appropriate permissions to act on an eligible step, a **View Available Actions** link appears in the Step Status column. Users can then click the link to open the Workflow Action page to process their step.

DEM - Application Enhancement #30066: High Level Design

Summary

Request Status: Pending Functional Spec **Created By:** John Smith

Description: OneRing not responding

Action Required

Please choose an outcome for the step: **High Level Design**

- **Complete**
- **Not Completed**
- **More Info Required**

Notes

Done Cancel

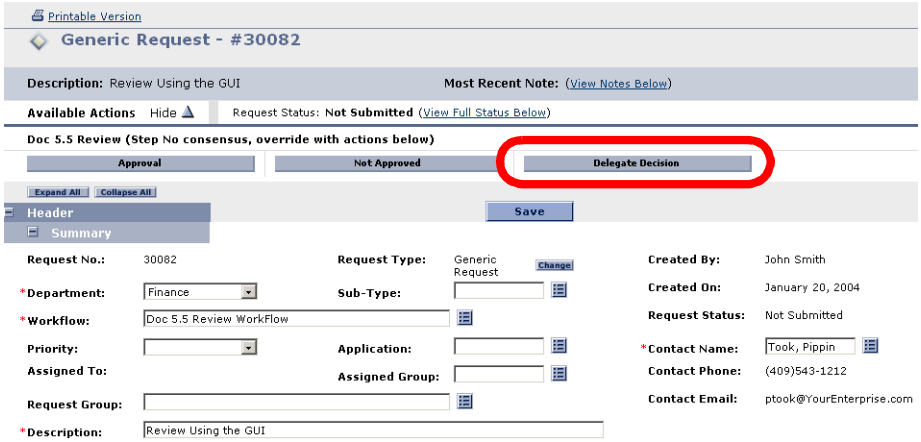
Delegating a Decision

For situations where someone else should make a decision, Workflow Steps requiring an Approve All or At Least One decision allow the delegation of that decision to another user.

To update the status of a particular Request:

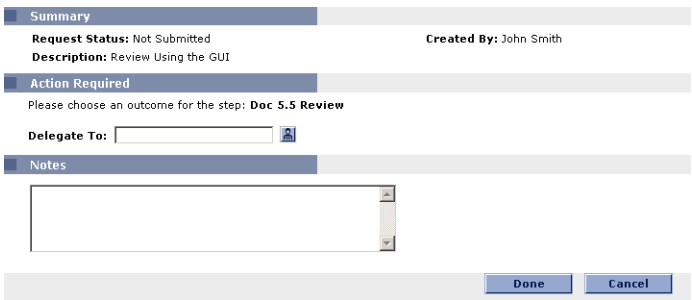
1. Open the Request.

   Any available actions are displayed at the top of the page.



2. Click **Delegate Decision**.

   The Application Enhancement page opens.



3. In Delegate To, select the delegate from the drop down list.
4. (Optional) In the Notes section, enter additional information.
5. Click **Done**.

Bypassing a Decision or Execution

From time to time, it might be necessary or desirable to bypass a Decision or Execution step. If the step is configured to allow a bypass, a radio button choice or auto-complete field appears in a Workflow action page, such as, Approve Bug Fix.

To bypass a Decision or Execution:

1. Open the Request.
2. Scroll down to the Status section.
3. Click the name of the Execution Step.

   The Workflow action page opens.
4. Check the **Bypass** radio button.

5. Click **Done**.

If you are bypassing an execution step, the Workflow Action page will change and ask for a result for the bypassed execution. Select the desired outcome and click **Done**.

Scheduling an Execution

To schedule an Execution:

1. Open the Request.
2. Open the Execute Request Commands page.

To open the Execute Request Commands page:

a. Scroll down to the Available Actions section.

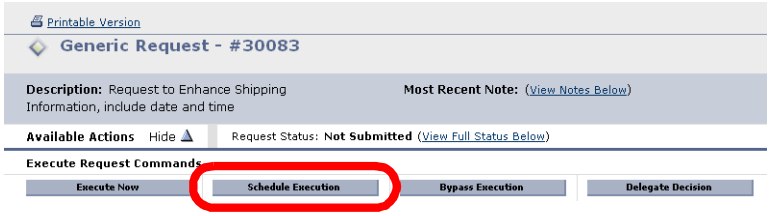
b. Click **Schedule Execution**.

or

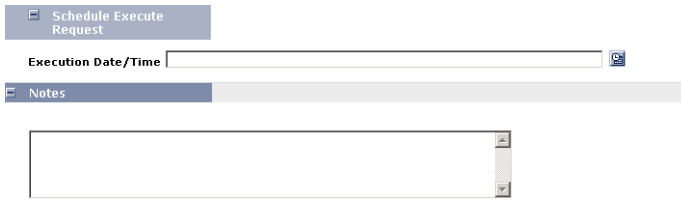
c. Scroll down to the Status section.

d. Click the name of the Execution Step.

The Execute Request Commands page opens.



3. In Execution Date/Time, enter the date and time for the Execution.



4. Click **Done**.

The Execution will run at the scheduled time.

Overriding Reference Relationships

Reference relationships make it possible for a Request to wait for other Requests to finish processing before making progress. Occasionally, it might be necessary or desirable to override such a relationship, enabling a Request to continue processing regardless of References to other Requests.

To override a Reference relationship:

1. Open the Request.

2. Click **Override** at the top of page.

Note

The **Override** button only appears if you have the proper Access Grants to override the Reference relationship.

The Request will proceed normally along its Workflow. The Reference Relationship details in the References section is updated to show that the relationship has been overridden.

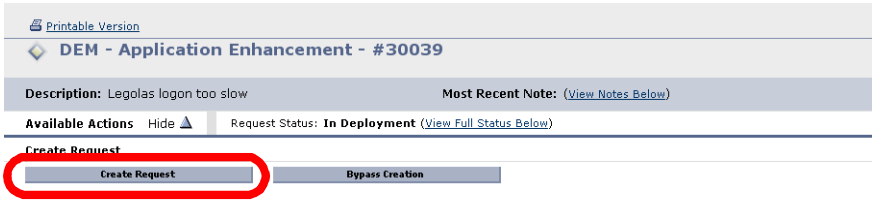
Spawning a New Request from a Request

In the process of resolving a Request, a new issue might come up that requires the creation of a new Request. New Requests can be created from an existing Request in two ways:

- **At any time from the References section of the Request's detail page.** For more detailed information on creating a new Request from the References section, see *"Creating a Request from the References Section"* on page 26.
- **At a pre-defined Workflow Step.** Mercury ITG Request Workflows can be configured so that they generate a Mercury ITG Request at specific points in the Request resolution process.

To create a new Request at a step in the resolution process:

1. Open the Request.
2. Scroll down to the Status section.
3. Click **Create Request** or the appropriate link.



The Application Enhancement page opens.

4. In Request Type, select a Request Type.
5. Click **Create**.

   The Request Submission page opens.
6. Fill in all appropriate fields.
7. Click **Submit**.

   The Request is submitted and saved.

   The status of the Create Request step of the original Request is set to Successful. The new Request is referenced as the child of the original Request.

Note

Users can view the details of the Request in the newly created Status section. Overall Request information can also be viewed from the References section of the original Request.

Creating a New Package From the Request

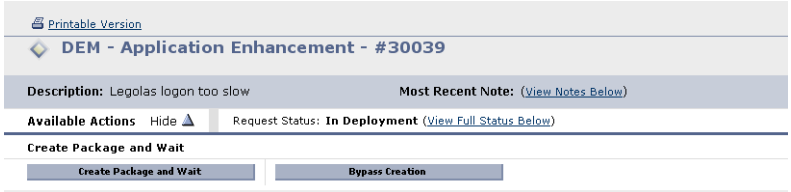
Demand Management is tightly integrated with Mercury Change Management, providing a closed loop system for Requests requiring software changes. In the process of resolving a Request, some code might need to be deployed using a Mercury ITG Package. From the Request, create a Package in one of two ways:

- **At any time from the References section of the Request's detail page.** For more detailed information on creating a new Package from the References section, see *"Attaching Packages"* on page 33.

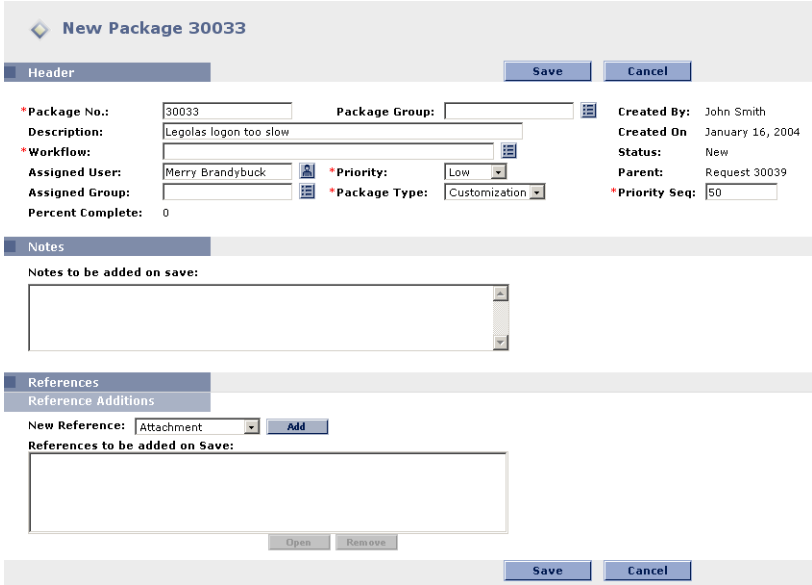
- **At a pre-defined Workflow Step.**
  Mercury IT Governance Request Workflows can be configured so that they generate a Mercury IT Governance Package at specific points in the Request resolution process.

To create a new Package at a step in the resolution process:

1. Open the Request.
2. Scroll down to the Status section.
3. Click **Create Package** or the appropriate link.



The page refreshes to display the New Package page. Matching header information is defaulted in the Package page, such as Description, Priority, and Package Type.



4. Enter any additional Header information or Notes.
5. Click **Save**.

The Package is saved.

Note that the standard interface can not be used to add Package Lines. Package Lines must be added using the Workbench. See Processing Packages (Change Management) for details.

Once the Package is completed, it automatically sends its final state (Closed - Success, Closed - Failed, Closed - Mixed, Cancelled) back to the Request. The Request then uses this final state as the result for the Create Package Workflow Step and moves forward based on the given Workflow definition.

Re-Opening Closed Requests

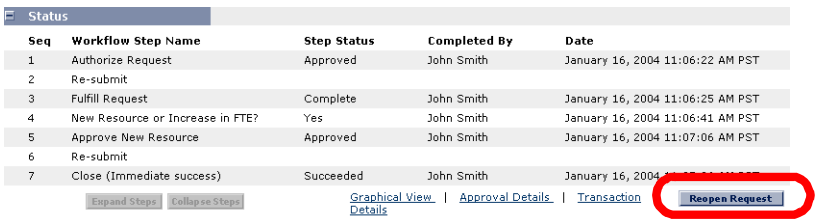
A Request can be re-opened at a pre-configured step in the process. For example, if a bug Request is generated which is subsequently closed and the bug reoccurs, the Request can be re-opened instead of creating or copying a new Request.

The following is the list of users who can re-open a closed Request:

- Mercury Demand Management Managers
- Creators of the Request
- Assigned Users
- Members of the Assigned Group
- Members of one of the Groups authorized to act on the Workflow

To re-open a Request:

1. Open the closed Request.
2. Scroll down to the Status section.
3. Click **Reopen Request**.



Configuring Workflow Display

Configuring which Workflow Steps in the Status section are displayed is done in the User Profile window of the Workbench.

To configure which steps are displayed in the Request status section:

1. Open the Workbench.

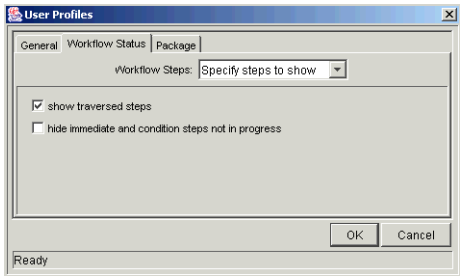
   See *"Launching the Workbench"* on page 20.

2. From the Workbench menu, select **Edit > User Profiles**.

   The User Profiles window opens.

3. Click the **Workflow Status** tab.

4. From the Workflow Steps drop down list, select either **Show all Workflow Steps** or **Specify steps to show**.



If **Specify steps to show** is chosen, the following options are available:

- show traversed steps
  Choose whether or not to see steps that have been completed and are no longer active.

- hide immediate and condition steps not in progress
  Since immediate Execution or Condition steps typically cannot be acted on, these steps can be hidden.

Chapter 7

Managing Requests

This chapter details the procedures to manage Requests. In Mercury Demand Management, once a Request has been submitted, it can be viewed, changed or deleted depending on changes to the business requirements or Workflow.

This chapter covers the following topics:

Deleting Requests

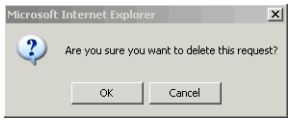
Only saved Requests can be deleted from Mercury IT Governance Center. In order to delete a saved Request, a user must have the Demand Mgmt: Manage Requests Access Grant.

To delete a Request:

1. Open the Request.
2. Scroll to the bottom of the Request's detail page.

   If you have the appropriate permissions to delete the Request, the **Delete** button will be visible.
3. Click **Delete**.

A question dialog opens prompting for a confirmation on the deletion.



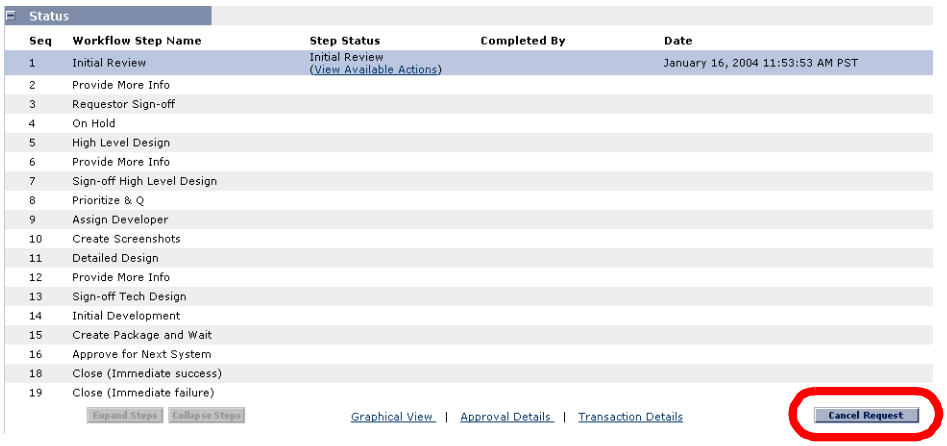
4. Click **OK** to delete the Request.

Canceling Requests

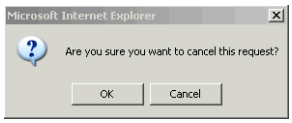
Requests can be canceled. In order for you to cancel a Request, you must have the Demand Mgmt: Manage Requests Access Grant. Only submitted Requests can be cancelled.

To cancel an existing Request:

1. Open the Request.
2. Scroll down to the Status section.
3. Click **Cancel Request**.



A question dialog opens prompting for a confirmation of the cancellation.



4. Click **OK** to cancel the Request.

   This cancels each Workflow Step and sets the Request Status to Cancelled.

Printing Requests

It is possible to print a Request's detail page by opening the Printable Version of the Request's detail page.

To print a Request:

1. Open the Request.
2. At the top of the Request's detail page, click the Printable Version link.

   A printable version of the Request's detail page opens in a separate page.

3. On the Request's detail printable version page, click **Print**.

   The Request's detail printable version page is sent to the printer.

Print

DEM - Application Enhancement - #30075

Description: Fellowship
Available Actions: No
Most Recent Note:
Request Status: Cancelled

Header

Summary

Request No.: 30075
Request Type: DEM - Application Enhancement
Workflow: DEM - Enhancement Request Process
Assigned To:
Assigned Group:
Requestor Department: Finance
Priority: Low
Description: Fellowship
Requested By: John Smith
Created On: January 16, 2004
Request Status: Cancelled
Application: Version Control App

Details

Enhancement Details

Enhancement Name: Fellowship
Detailed Description: fellowship
New Enhancement: Yes
Requested By: January 16, 2004
Requestor Location:
Suite:
Business Initative: Reduce order to delivery time

Analysis

Estimated Completion Date:

Demand Management SLA Fields

SLA Level:
SLA Violation Date:
Service Requested Date:
Service Satisfied Date:

Demand Management Scheduling Fields

Estimated Start Date:
Estimated Effort: 5
Reject Date:
Demand Satisfied Date:

Notes

Status

Step #	Step Name	Status	Acted On By	Acted On
1	Initial Review	Cancelled	John Smith	January 16, 2004 01:00 PM PST
2	Provide More Info			
3	Requestor Sign-off			
4	On Hold			
5	High Level Design			
6	Provide More Info			
7	Sign-off High Level Design			
8	Prioritize & Q			
9	Assign Developer			
10	Create Screenshots			
11	Detailed Design			
12	Provide More Info			
13	Sign-off Tech Design			
14	Initial Development			
15	Create Package and Wait			
16	Approve for Next System			
18	Close (Immediate success)			
19	Close (Immediate failure)			

Note

The printable version of the Request's detail page cannot be edited or updated.

Using Reports to Manage Requests

Demand Management features a pre-defined set of HTML-based Reports that can be accessed using a Web browser. The Reports provided with Demand Management display current detailed status of the Request's activity at any point in time. The following reports help track and manage Requests.

See Reports Guide and Reference for detailed information on the Report screens and extended functionality.

Resource Load Report by Priority

The Resource Load Report by Priority Report lists open Requests assigned to users based on the filtering criteria that is entered. The report lists the Request count per priority as well as the average age (from Request creation) of the Requests in each priority bucket.

Request Detail Report

The Request Detail Report is the primary report in Demand Management. It reports on Requests by a large number of selection criteria. For each Request, the report can display:

- All the notes and/or References attached to the Request.
- The current status of the Request.
- A listing of transacted steps.
- All the populated detail fields for the Request.

Use this report to see Requests assigned to you or Requests ready for your review. This report can also display all new Requests needing to be tracked.

Request Summary Report

The Request Summary Report offers the same ability to choose selection criteria as the Request Detail report, but provides the total counts for groups of Requests matching the selection criteria. Categorize and group selected Requests and get the counts for each group. *Figure 7-1* displays an example of the total number of Requests created by a user, grouped by Priority.

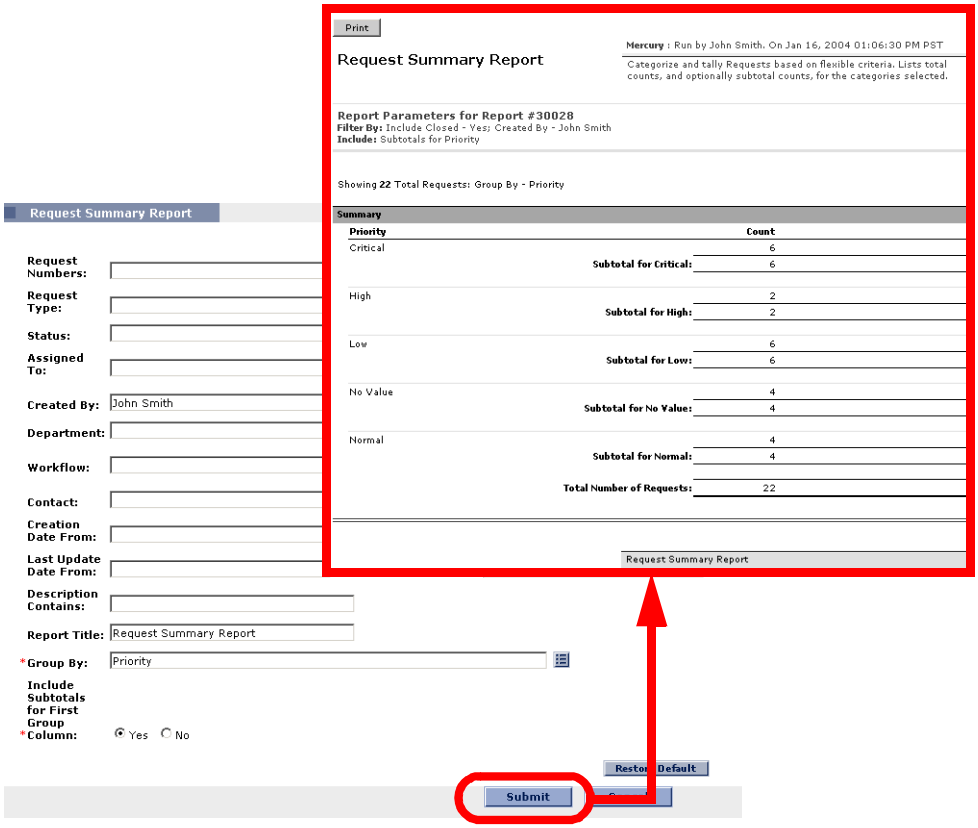


Figure 7-1 Sample Request Summary Report Grouped by Priority

Submitting a Report

For information on submitting a Request specific report, refer to *"Mercury Demand Management Reports"* on page 95.

Using the Dashboard to Manage Requests

The Dashboard provides a powerful tool for managing Demand Management Requests. From the Dashboard, managers can quickly view all incoming Requests and assign them to team members. They can also configure additional Portlets to monitor the Request activity based on the assigned user, priority or Request Type.

For more detailed information, see Using the Dashboard.

Chapter

8

Mercury Demand Management Reports

Mercury Demand Management features a pre-defined set of HTML-based reports that are accessed through a Web browser. These reports allow users to view the current detailed status of their data at any point in time. Demand Management also allows users to build their own reports.

This chapter describes the procedures used to submit and view reports in Demand Management using both the Workbench and the standard interface.

This chapter covers the following topics:

- *Reports*
- *Processing Reports*

Reports

The reports shipped with Demand Management are listed in *Table 8-1*. These reports can be accessed through both the Workbench and the standard interface. All Mercury ITG Reports, including details for their parameters, are in Reports Guide and Reference.

Note

Table 8-1 lists all standard Report Types that have a product scope of **Mercury Demand Management** or **All Products**.

Table 8-1. Demand Management Reports

Report	Description
Contact Detail Report	Queries the Contacts entered in your Mercury Demand Management system as you enter and update Requests.
Contact Synchronization Report	Provides an interface for ensuring that the Demand Management Contacts are properly defined. This report can detect all users with no corresponding Contact record and then create a Contact record for them. This report also searches for and corrects discrepancies between the Contact and user information within the system.
Notification History Report	Workflow report that lets you view Notifications that have been sent or are pending. It contains such information as: Notification Date, Entity Type, Subject of the Notification, and Recipient List.
Portlet Detail Report	This is an application administrator Report used to return the details of a Portlet or range of Portlets. It lists the Portlet's columns, as well as the SQL query used by the Portlet to retrieve data from the system. The Portlet's filter fields and security configuration can also be listed.
Report Type Detail Report	Displays the parameters and parameter details for each Report Type. It also displays the exact commands used to run the report.
Request Detail (Filter by Custom Fields) Report	Similar to the Request Detail Report except that you can filter for Requests by values in custom fields. Specify the particular Request Type to report on, select up to four of the custom fields for that Request Type and run the report for specific values for each of those fields.
Request Detail Report	Displays Requests based on a large number of selection criteria.
Request Header Type Detail Report	Administration report that lists the detailed set-up information for the Request Header Types. This report can be used to audit your set-up as well as help debug any problems with Requests using a given Request Header Type. You can also display information about field filters that have been selected for the Assigned To, Assigned Group and Contacts fields.
Request History Report	Lists the complete Workflow and field change history for each selected Request. The report provides details of every change in the status of each Workflow Step for selected Requests.
Request Listing Report	Provides a useful interface for viewing selected Request information. It lets you select various fields for inclusion or exclusion and specify the desired display order. The Request Listing Report can also be used to export data to MS Excel or another data analysis tool. This report's output is formatted as an HTML table that can be copied and pasted from your Web browser into the data analysis tool.

Table 8-1. Demand Management Reports [continued]

Report	Description
Request Quick View Report	Lists a quick summary of open and closed Requests, breaking down the Requests by priority. The report also shows the Request activity for the current week (using a Sunday to Saturday week) in regards to Requests opened and Requests closed. The report can also show selected Request information for each of the individual open Requests, allowing managers to see both a summary view on Request activity and one level down in Request detail.
Request Summary (Filter by Custom Fields) Report	Similar to the Request Summary Report except that you can filter for Requests by values in custom fields. Once the Request Type to report on is specified, select up to four of the custom fields for that Request Type.
Request Summary Report	Gives the total counts for groups of Requests matching the selection criteria. You can categorize/group selected Requests in as many as five categories and get the counts for each group.
Request Type Detail Report	Administration report that lists the detailed set-up information for your Request Types. This report can be used to audit your set-up as well as help debug any problems with Requests of a given Request Type. You can also display information about which Security Groups are allowed to create Requests of a specific Request Type, and which Workflows can be used in a specific Request Type.
Resource Load Report by Priority	Lists all open Requests assigned to different users based on the filtering criteria that you select. The report lists the Request count per priority as well as the average age (from Request creation) of the Requests in each priority bucket.
Security Group Detail Report	Lists set-up information for a single Security Group or a group of Security Groups. It displays such information as which users belong to the group, what Workflow Steps the Security Group has access to, and what screens the users in the Security Group can update. The report can also display which entities can use a Security Group's information in its search fields, and which Request Types that members of a designated Security Group are allowed to create.
Special Command Detail Report	This report lists details for a special command, or a range of special commands.
User Data Detail Report	The User Data Detail report displays the definition of each custom User Data field. The report is grouped by entity and lists all the custom fields for each entity. It also lists referenced Validations for the fields.
User Detail Report	Lists the users defined in your system, licensing information for the user and the Security Groups description attached to each user.

Table 8-1. Demand Management Reports [continued]

Report	Description
Validation Report	Application administration report on the various custom Validations. These can be Validations that you entered into the system or those that are standard with products.
Workflow Detail Report	Displays the complete definition of a specific Workflow or a set of Workflows. This report is useful for auditing and analyzing Workflow business process, User Data, Subworkflows, Workflow Step commands and expanded Special Commands.
Workflow Statistics Report	Provides statistical information regarding the usage of the Workflow.

All Report Types ending with 'Report' are textual reports that list details about specific entities.

Processing Reports

Demand Management reports can be run from the Workbench or the standard interface. Similarly, previously run reports can be viewed from either interface.

This section covers the following topics:

- *"Submitting a Report from the Workbench"* on page 98
- *"Submitting a Report from the Standard Interface"* on page 101
- *"Viewing Previously Submitted Reports from the Standard Interface"* on page 104
- *"Viewing Previously Submitted Reports from the Standard Interface"* on page 104

Submitting a Report from the Workbench

To submit a report from the Workbench:

1. Open the Workbench.

See *"Launching the Workbench"* on page 20.

2. From the Shortcut bar, click **Demand Mgmt > Reports**.

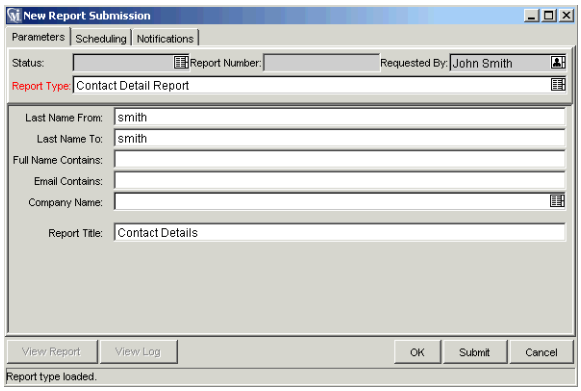
   The Report Submission Workbench window opens.

3. Click **New Report**.

   The New Report Submission window opens.

4. From the Report Type auto-complete list, select the type of report to submit.

   After selecting the Report Type, parameters appear in the **Parameters** tab of the New Report Submission page. These parameters are report-specific and change depending on the Report Type.



Note

You might not have access to all Report Types. To access to a Report Type, that is not listed, contact the application administrator for permission.

5. Fill in all the required parameters (as indicated by the red field label) and any optional parameters for the report.

6. (Optional) Set up the schedule for running the report.

   If no scheduling information is entered, the report runs immediately. To set up the schedule:

   a. Select the **Scheduling** tab.

      The **Scheduling** tab opens.

   b. Check Schedule the Report.

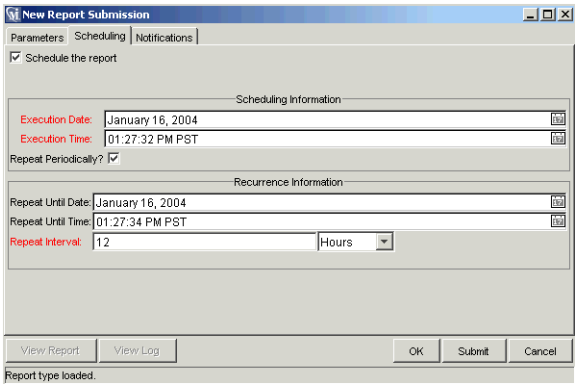
The Scheduling Information section appears.

c. Fill in the scheduling parameters.

d. If needed, check Repeat Periodically.

The Recurrence Information section appears.

e. Fill in the recurrence parameters.



7. (Optional) Set up the Notification.

To set up the Notification:

a. Click the **Notifications** tab.

The Add Notification for Report Submission tab opens.

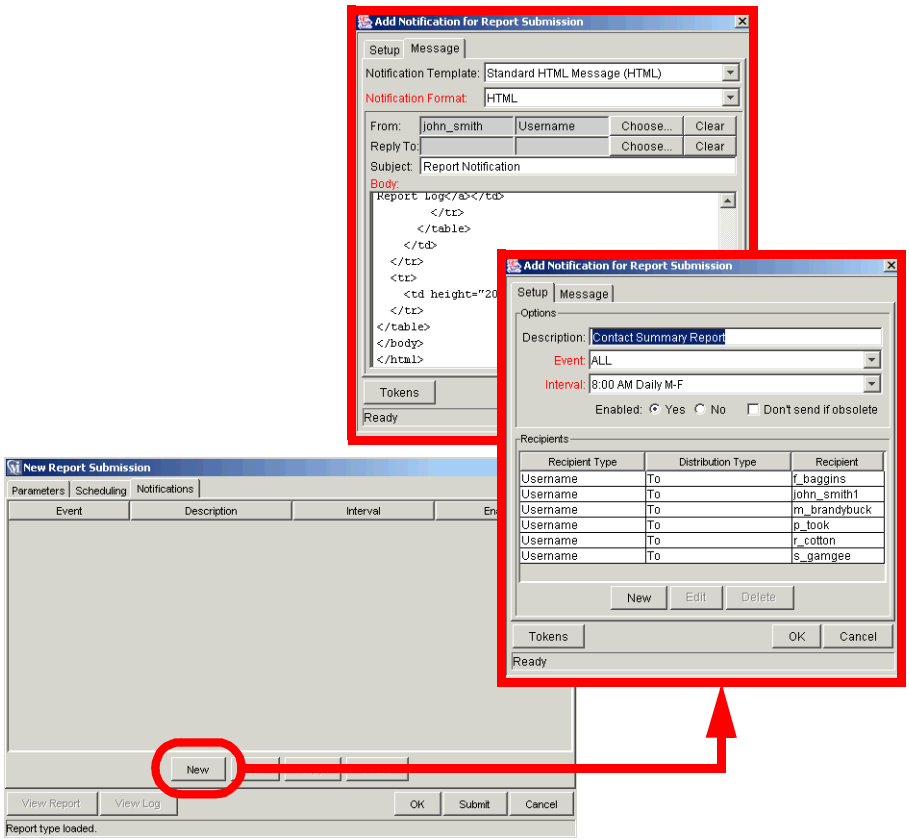
b. Click **New**.

The Add Notification for Report Submission window opens.

c. On the **Setup** tab, select any users who should be informed of the report results.

d. On the **Message** tab, create the email message to send with the report.

e. Click **OK** to close the Add Notification for Report Submission window.



8. Click **Submit** to run the report.

9. Click **View Report** to view the results of the report in a Web browser.

10. If the report fails, click **View Log** to view the technical details of the report execution.

Submitting a Report from the Standard Interface

To run a report from the standard interface:

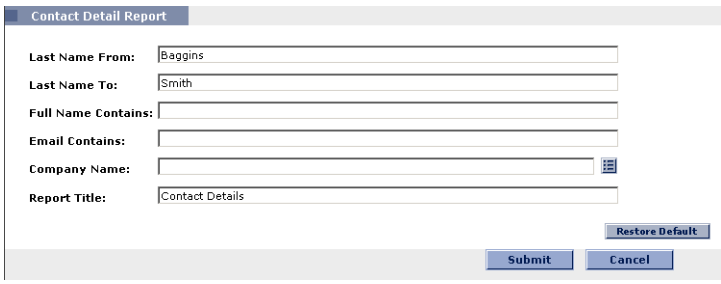
1. Logon to Mercury Demand Management.

2. From the menu bar, select **Reports > Request Reports**.

   The Available Reports page opens.

3. Select the report to be submitted by clicking the linked name of the Report.

   Regular reports are available in separate sections of the Reports page. The Report's creation page opens.



   Report creation pages display the fields associated with the Report. Required fields are indicated by a red asterisk (*).

4. Fill in all the required parameters and any optional parameters for the report.

5. Click **Submit**.

   The Report Submitted page opens. The report's output is displayed in a separate page.

Viewing Previously Submitted Reports from the Workbench

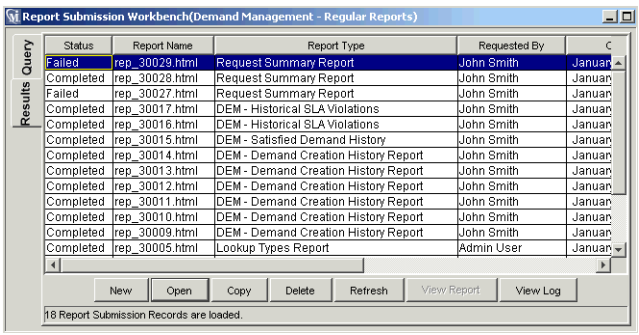
Reports can be restricted by permissions (Security Groups) and to the originator. Contact the application administrator to get permission for reports that are restricted by Security Groups.

To view previously submitted reports from the Workbench:

1. Open the Workbench.
2. From the Shortcut bar, click **Demand Mgmt > Reports**.

   The Report Submission Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

   All matching report submissions are listed in the **Results** tab.



5. Select the report.
6. Click **Open** to view the criteria used for the report.
7. Click **View Report** to view the report output.

Note

It is not possible to modify the values used for a previous report submission. However, it is possible to copy an existing report submission and make changes to the copy. The copied report can then be submitted.

To make a copy, Select a Report Submission on the **Results** tab of the Report Submissions Workbench window and click **Copy**.

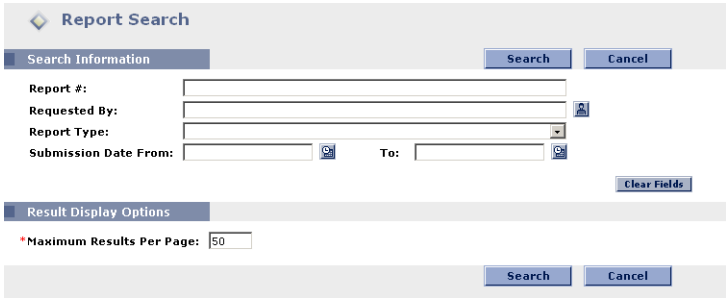
Viewing Previously Submitted Reports from the Standard Interface

Reports can be restricted by permissions (Security Groups) and to the originator. Contact the application administrator to get permission for reports that are restricted by Security Groups.

To view a previously submitted report from the standard interface:

1. Logon to Mercury Demand Management.
2. From the menu bar, select **Search > Reports.**

   The Report Search page opens.



3. In the Search Information section, enter search criteria.
4. Under Result Display Options, enter the maximum number of results to be displayed.
5. Click **Search**.

   The Report Search Results page opens. The page displays summary information about any reports that match the search criteria.
6. Click the report number under the Report # column to see the output details of any report.

Appendix A

Integrating Requests and Projects

Mercury IT Governance Center integrates issue tracking with project management using Mercury Demand Management and Mercury Project Management. Mercury Demand Management Requests and Mercury Project Management Projects and Tasks can be linked to each other through a variety of dependent and informational relationships. Utilizing these relationships, Requests can be folded seamlessly into a scalable framework of interlocking initiatives. Linking Tasks to Requests from Mercury Demand Management also gives instant visibility to detailed activities supporting an overall project.

This appendix covers the following topics:

Integrating Requests and Projects Overview

This section lists the components required to integrate Requests and Projects. These components are:

- **Mercury Project Management, A Project Management System**
  Mercury Project Management enables collaborative project management for both repetitive projects, such as installing a new release of your HRMS applications, and one-time projects, such as developing a new e-commerce capability. With Mercury ITG, you accelerate project delivery while reducing your project costs.

- **Mercury Demand Management - A Request Resolution System**
  Mercury Demand Management is a Workflow-driven Request resolution system for business applications. It allows you to effectively capture, route and resolve business Requests.
- **Integration**
  Companies with both Mercury Demand Management and Mercury Project Management can create processes that take advantage of each product's functionality.

Referencing Requests from Projects

Requests can be linked to Projects through an informational Reference relationship. This is done from the **References** tab in the Project Information window in the Workbench, or from the References section of the Project Detail page.

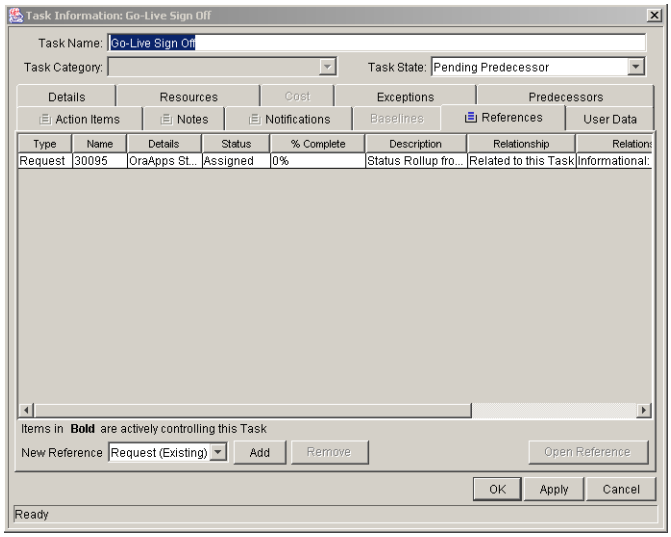


Figure A-1 References tab

Creating Tasks from Requests

Occasionally, a Request can be filed by a user that would be desirable to make into its own Task in a Mercury Project Management Project, creating for it deliverable dates and track-able actuals. Tasks can be created from Requests in

the Project Management Workbench. A Task created from a Request behaves like any other Task in the Project, save for that the Tasks's % Complete and State are automatically updated by the originating Request as it moves through its Workflow. The new Task has the dependency relationship Task Updated by Request.

Example

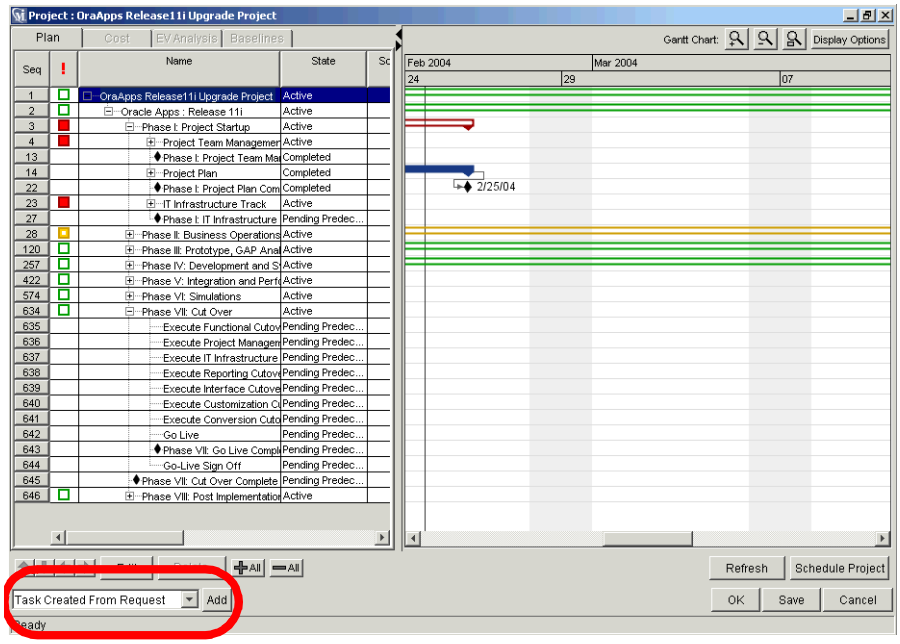
A manager in a software company wants to create a Project that will track all of the bugs currently logged against a particular product. In the Workbench, the manager can search for bug Requests related to the product, and turn them into Tasks in the Project Plan. From there, the manager can perform any typical Project action, such as tracking the completion dates for each Task or monitoring triggered Exceptions.

Note

You must be in the Project Management Workbench in order to create a Task from a Request.

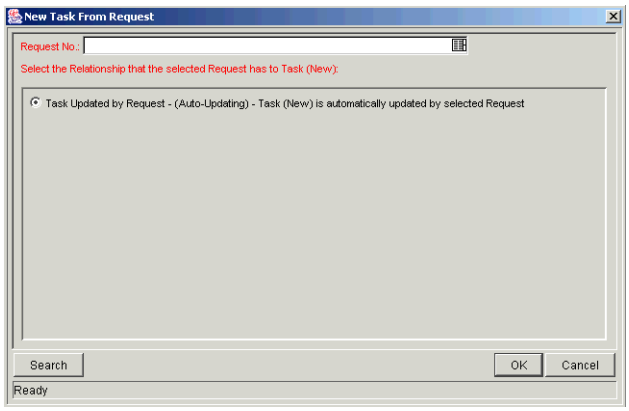
To create a Task from a Request:

1. Open the Project.
2. From the Project window, select **Task Created From Request** from the drop down list at the bottom left corner of the window.



3. Click **Add**.

   The New Task From Request window opens.



4. To select the Request to attach, use one of the following methods:

   - Select a Request number from the Request No. field.
   - Click **Search** to search for Requests to add in a separate query window.

5. Click **OK** to create the new Task and close the window.

The new Task has been created from the selected Request and is part of the current Project. The Task is linked to the Request.

Dependencies Between Tasks and Requests

The dependencies that can be created between Requests and Tasks are described in *Table A-1*.

Table A-1. Dependency Relationships - Requests to Tasks

Relationship	Description
Related to this Task	(Informational) - Selected Request is related to the Task.
Successor	(Blocking) - Action not allowed on selected Request until the Task closes.
Predecessor	(Blocking) - Action not allowed on the Task until the selected Request closes.
FF Predecessor	(Finish Finish Predecessor: Blocking) - The Task and Request complete together.
Task Updated by Request	(Auto-Updating) The Task is automatically updated by the selected Request.

For more detailed information on using these dependencies, see *"Making Tasks Dependent on Requests"* on page 109 and *"Making Requests Dependent on Tasks"* on page 113.

Making Tasks Dependent on Requests

When selecting dependencies between Tasks and Requests, there are many relationships to choose from. These relationships are set by attaching a Request to a Task as a Reference. This is done from the **References** tab in the Task Information window in the Workbench, or from the References section of the Task Detail page in the standard interface.

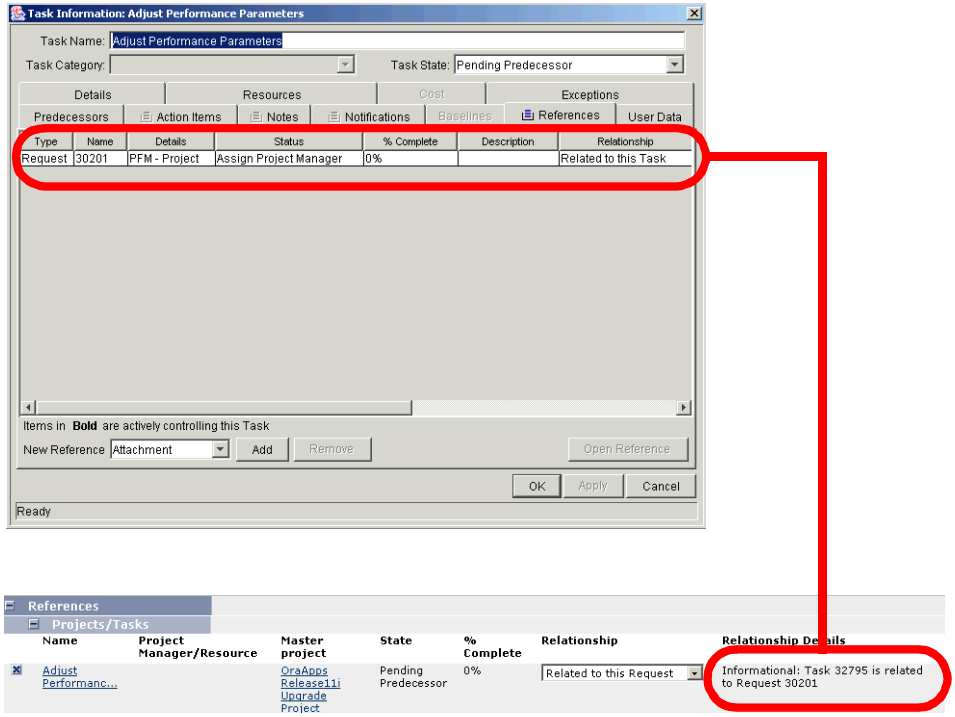


Figure A-2 References Tab and References Section for Tasks

The following sections contain more detailed information on dependencies for Tasks created from Requests.

This section covers the following topics:

- *"Task Waits on Request Closure (Successor Relationship)"* on page 110
- *"Task Can't Complete Until Request Closes (FF Predecessor)"* on page 111
- *"Task Auto-Updated by Request"* on page 112

Task Waits on Request Closure (Successor Relationship)

This Relationship dictates that the Task state cannot change until the associated Request is closed. The Task will immediately move into a "Pending Request" state. When the Request is closed, the Task can be acted upon once more. This does not stop other fields from being edited.

Example

A software company's Support Division makes the decision that no patches will be released without accompanying documentation. The company has an unfortunate history, however, of changing its mind about patches that are to be released, and numerous times there have been documentation changes made to accommodate patches that were cancelled after being initially approved. Patch A's approval Request is moving through its resolution process in Mercury Demand Management. The Documentation team is ready to begin making changes to all documents to account for Patch A, and has created a Project in Project Management. The Project includes the Task Begin Doc Changes for Patch A.

The Documentation Team's manager creates a Reference to Patch A's Request from the Begin Doc Changes for Patch A Task, with the relationship Successor. This way, the Task cannot be moved from its status of Ready to In Progress until Patch A's approval Request is closed, ensuring that the documentation changes are valid and needed.

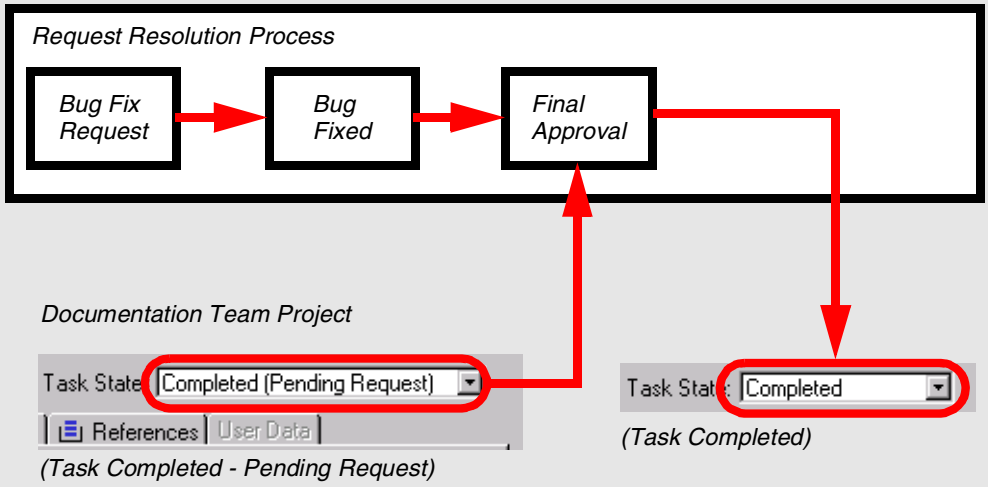
Task Can't Complete Until Request Closes (FF Predecessor)

This Relationship dictates that the Task state cannot change to Complete until the associated Request is closed. When the Resource working on the Task is finished with it, and the State is set to Completed (% Complete will be set to 100%), this Task will move into a Completed (Pending Request) state. When the Request is closed, the Task is then set to 'Completed.' This does not stop other fields from being edited.

Example

A software company's Support Division makes the decision that no patches will be released without accompanying documentation, including bug fixes. The Documentation Team wants to make sure that its documentation is accurate and complete for every bug fix that takes place. The last step in the company's bug fix resolution process is a review by the person who originally filed the bug. A Request to fix Bug 62547 has been filed and nearly completed, necessitating changes to the documentation.

The Documentation Team has a Project in Project Management, one of whose Tasks is Doc Changes Complete. The Documentation Team manager creates a Reference to Bug 62547's Request, with the relationship FF Predecessor. This way, the Task cannot be fully completed until Bug 62547's fix has been approved by the Requestor, closing the Request



Task Auto-Updated by Request

This Relationship is for Tasks created from Requests. As the Request moves through its process, it will update the Task with its status information. When the Request is submitted, the Tasks moves to In Progress. When the Request is completed, the Task is Complete. When the Request is cancelled or deleted, the Task is cancelled. A single Request can drive multiple tasks. If the Request's Workflow has % Complete values defined, the Request will also update the Task with % Complete information.

Note

Since % Complete and Task State are automatically updated by the driving Request(s), users cannot update these two fields. The text "(Updated by Request)" will be appended to the Ready and In Progress states to indicate this.

Making Requests Dependent on Tasks

Requests can be made dependent on Tasks. This is done from the References section of the Request page in the HTML interface.

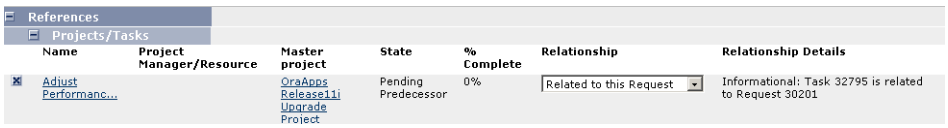


Figure A-3 References Tab and References Section for Requests

The section, *"Request Waits on Task Closure (Predecessor)"* on page 113, contains more detailed information on dependencies for Requests set by Tasks:

Request Waits on Task Closure (Predecessor)

This Relationship dictates that the Request's user cannot perform any Workflow Actions until the associated Task is closed (completed, bypassed, or cancelled). The Request will immediately move into a 'Pending Task' status. When the Task is closed, the Request can be acted upon once more. This does not stop other fields from being edited.

Example

A software company's Support Division makes the decision that no patches will be released without accompanying documentation. The Documentation Team wants to make sure that any patch Request won't close until the patch documentation is finished. A Mercury Demand Management user is assigned a Request going through the company's patch approval/release process. At the same time, the Documentation Team has a Project in Project Management, one of whose Tasks is 'Patch Docs Completed.' The user creates a Reference to that Task, with the dependency 'FF Predecessor.' This way, the patch Request will not close until the 'Patch Docs Completed' Task is complete.

Visibility into Tasks and Requests

Mercury ITG Center provides the following for enabling visibility into Request and Task integration.

- *"Requests Holding Up Progress"* on page 114
- *"Project References Portlet"* on page 114

Requests Holding Up Progress

You can search for Requests that are holding up progress on your projects. Each Portlet in the Dashboard that deals with Requests includes the field Preventing Action on Requests/Tasks. This field can be set to display Requests that are preventing action on other Requests or Tasks.

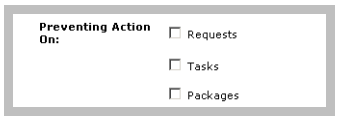


Figure A-4 Request Portlet Filter Page Showing 'Preventing Action On' Field

Project References Portlet

You can also view References related to your Tasks and Projects using the Project References Portlet on your Dashboard. Add the Portlet to your Dashboard and then personalize it to show the References that are relevant to your activities. The Portlet can be personalized to display References based on the following information: Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks.

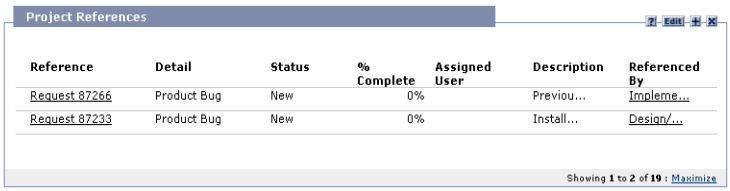


Figure A-5 Project References Portlet

Appendix

Index

S

T

U

V

W