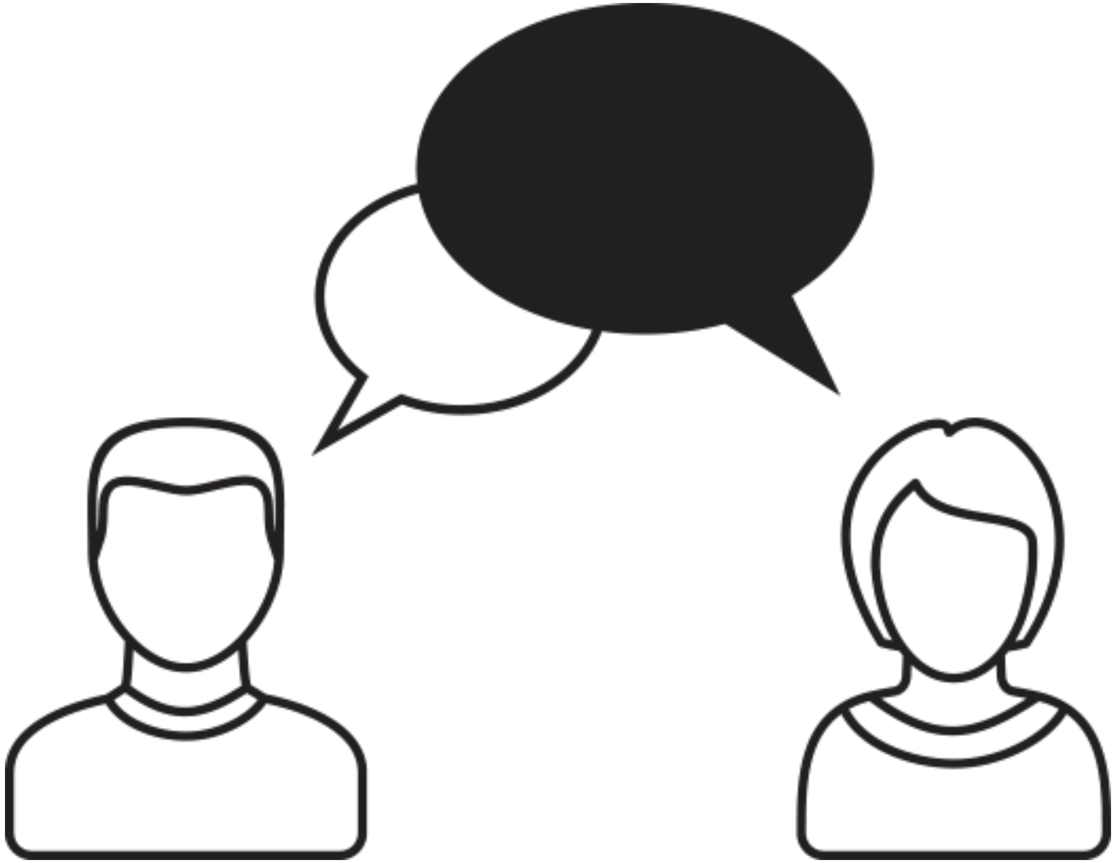
regoUniversity 2017

Demand Management | Best Practices

Your Guides: Jerry Dolak, Grant Zemont

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Overall Agenda

- Introduction
- Incident Overview and Discussion
- Idea Overview and Discussion
- Interface to Idea from ServiceNow
- Wrap Up

Part I:
Demand Management Introduction

Introduction

- Class Overview
- Value of Demand Management

Part I
Agenda

Class Overview

- This session is designed for anyone seeking to better understand demand management within CA PPM
- Instructor will lead the class through a live session(s)
- Screen shots of various views are provided for reference
- Questions/comments will be taken as we go
- Topics needing more discussion will be put in parking lot for end-of-session wrap-up

What is Demand Management

A process to receive and evaluate future work, and then compare that against resource availability and timing constraints

CA PPM provides two avenues to manage Demand: Incidents and Ideas

NOTE: Both require only a viewer license

Value of Demand Management

- Capture Demand for future projects to be used in Resource Management and Portfolio Management
  - It is very difficult to implement resource and portfolio management without ideas representing future demand
- Automating the capture of demand in a single system – one source of truth
- Automating the approval process for demand that will become projects
- Use of Incidents can reduce the number of investments

Demand Component Details

Incidents

- Were originally intended to capture unplanned work in the nature of Help/Service Desk type of requests
- Can be converted to projects or tasks
- Can be interfaced in from your ITSM System
- Can be associated with Services
- Can have time tracked to them *(However, they are not in some of the normal OOTB slices with assignments)*

Ideas

- The initial stage of creating new opportunities for investments - can be converted to: projects, assets, applications, products, services, and other work *(Rego has a process in Xchange to convert them to tasks)*
- Can have financial plans
- Can have time tracked to them
- Can be put in investment hierarchy
- Can be part of a Portfolio

Part II:
Demo of Incidents

Demo of Incidents

- Open Mic
- Incident Properties
- Conversion to Tasks/Projects
- Linking to Investments
- Security Overview
- Special Uses
- Reporting

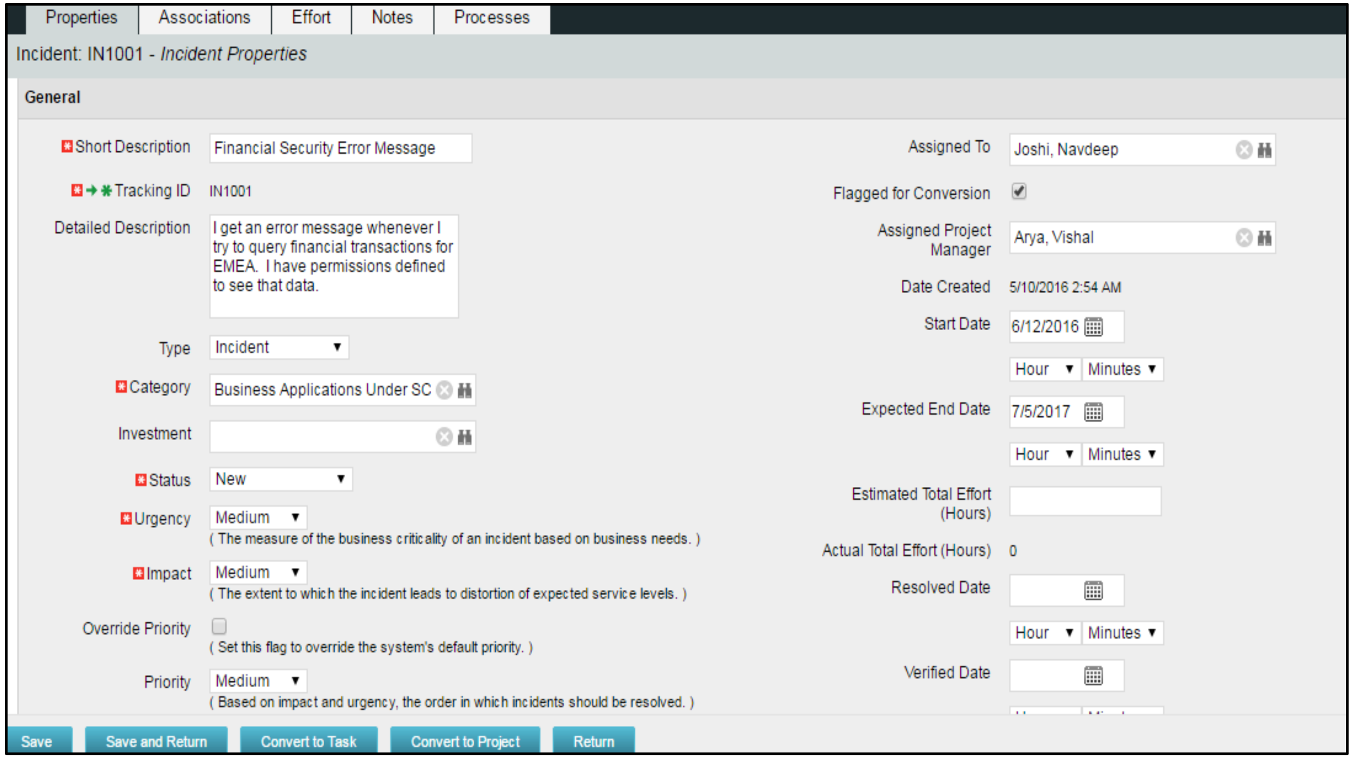
Part II Agenda

Open Mic

Are you using Incidents within your organization?

- What are you using For?
- How is adoption?
- What issues have you encountered?

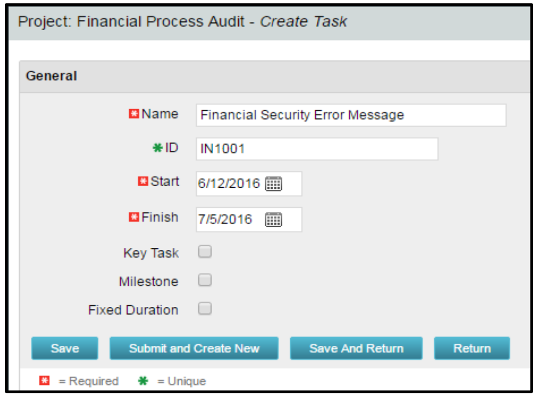
Incident Properties



Short Description – Name of Incident
Tracking ID – Tracking ID for Incident. This field is read-only if auto-numbering is enabled
Detailed Description – This is the detailed description for Incident
Type – Incident or Service Request
Category – Classification for the Incident
Urgency – Low, Medium, High
Impact – Low, Medium, High
Override Priority - Indicates if the priority of the incident can be overridden
Priority - The order of resolving incidents based on impact and urgency
Assigned To – The resource assigned to this Incident

Conversion to Projects/Tasks

1. The Flagged for Conversion check box in Incident should be checked.
2. Incident should have a project manager in the Assigned Project Manager field
3. The project manager who is assigned to the incident, can only convert the incident to a project or task

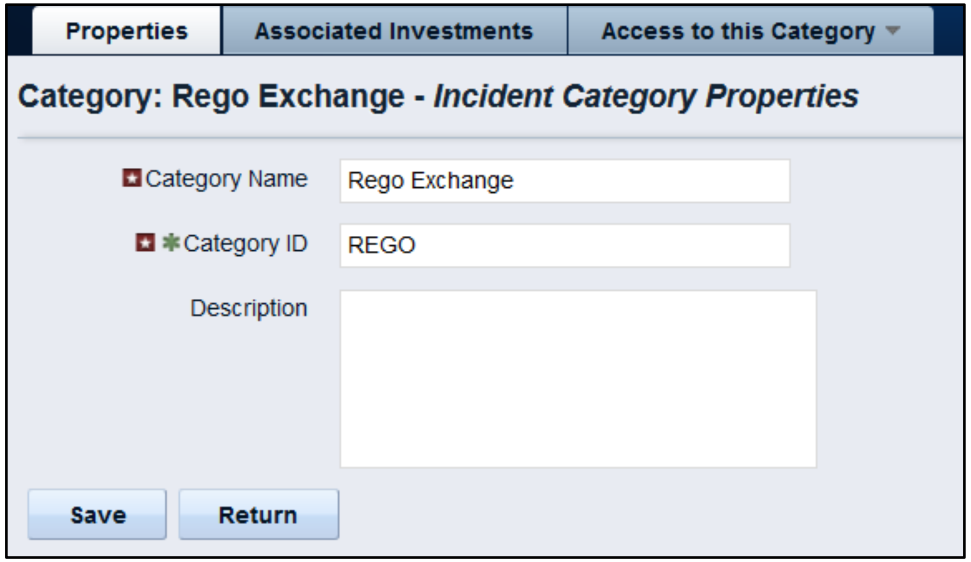


- Incident is converted to a Task on an existing Project
- Details from the incident page are replicated on the Create Task page.

See below how the Incident date converts to Project or Task data

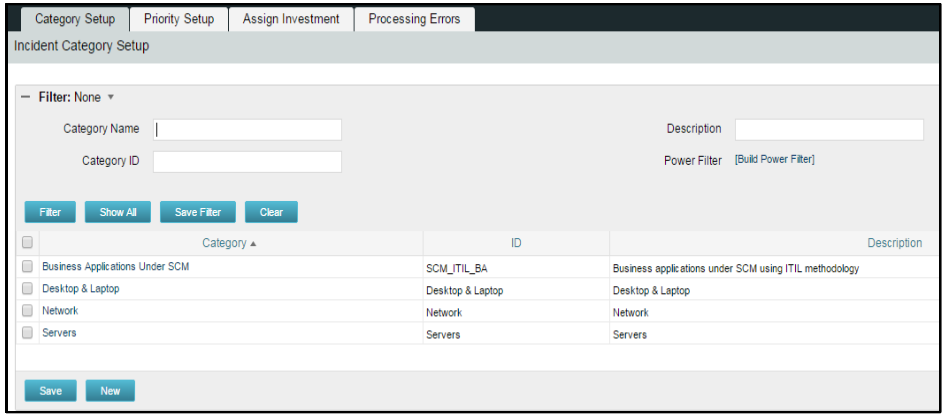
Incident Data Field	Project Data Field	Project Task Field
Short Description	Project Name	Name
Tracking ID	Project ID	ID
Status	Status (Unapproved)	Status (Not Started)
Detailed Description	Description	N/A
Assigned Project Manager	Manager	N/A
Start date	Start Date	Start (date)
Expected End date	Finish Date	Finish (date)

Linking to Investments



Security Overview

- In order to gain access to incidents, incident categories must be created within the administration section (Data → Incidents).



- A person/group/OBS can be given rights to manage or select the incident category.

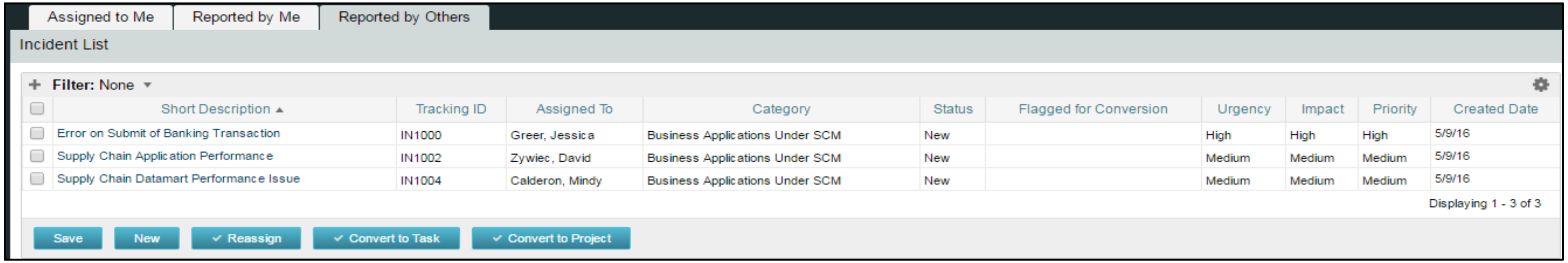
Access Right▲	Description
Incidents - Manage Category Incidents	Allows user to manage incidents mapped to this category. This right includes Incidents - Select Category.
Incidents - Select Category	Allows user to select this category from the incident form.

Special Uses

- Incidents to perform tasks that you typically need creator license to do:
  - Self-Add to team
  - Make changes to fields on projects
- Incidents to manage CA PPM enhancement requests and break fix
  - Allows users to enter CA PPM based requests directly in the application
  - CA PPM admin team can manage updates within CA PPM and use for communication back to requester

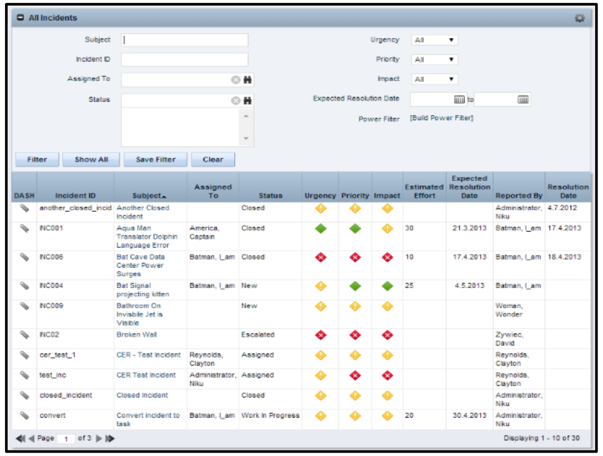
Reporting

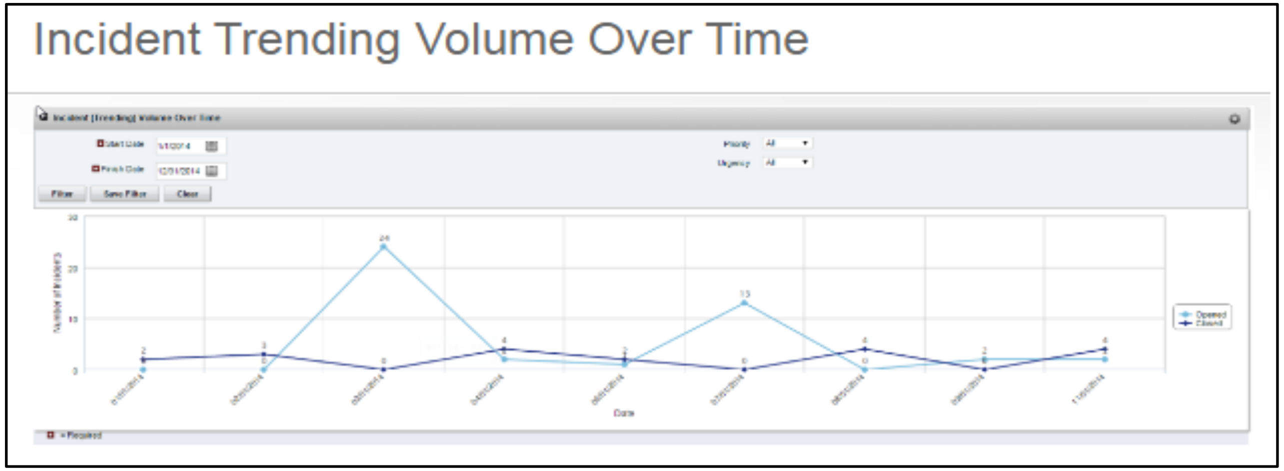
OOB reporting on Incidents



Short Description	Tracking ID	Assigned To	Category	Status	Flagged for Conversion	Urgency	Impact	Priority	Created Date
Error on Submit of Banking Transaction	IN1000	Greer, Jessica	Business Applications Under SCM	New		High	High	High	5/9/16
Supply Chain Application Performance	IN1002	Zywiec, David	Business Applications Under SCM	New		Medium	Medium	Medium	5/9/16
Supply Chain Datamart Performance Issue	IN1004	Calderon, Mindy	Business Applications Under SCM	New		Medium	Medium	Medium	5/9/16

RegoXchange reporting on Incidents





Part III:
Demo of Ideas

Part III Agenda

Demo of Idea

- Open Mic
- Uses for Ideas
- Idea Properties
- Allocations
- Cost/Budget Planning
- Conversion to Other Investments
- Reporting

Open Mic

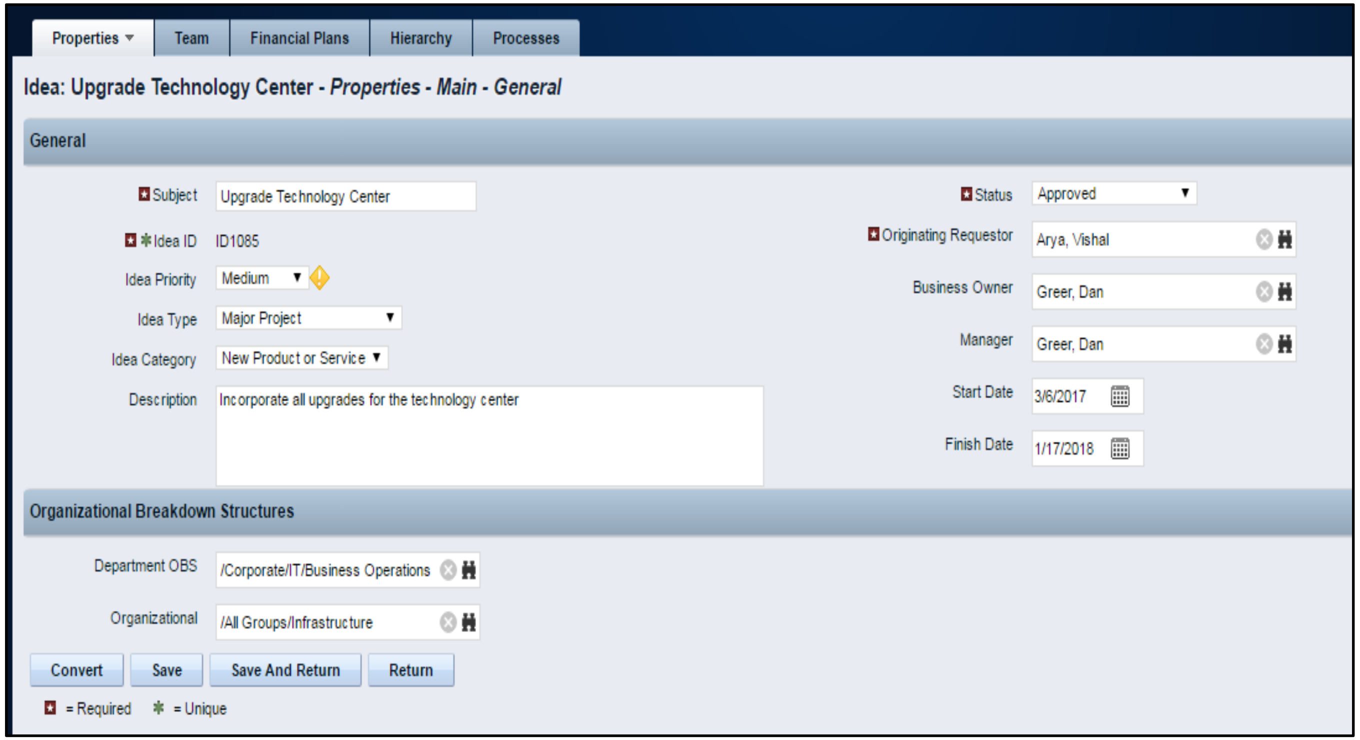
- For those using Ideas:
  - Are you using the Team?
  - Are you using Cost Plans?
  - Are you aligning to a Portfolio?

- Are you using an approval process for Idea promotion to a Project?
  - How are approvers being determined?
  - Are you prioritizing the Ideas?
  - How many ideas are being rejected?

Uses for Ideas

- Work that is being considered or high-level planning
- Business Case review and validation
- Staffing to Idea for short-term time capture and long-term planning
- Capture initial financials
- Alignment of ‘planned work’ to overall project load within potfolios
- Conversion of Team and Cost Plans to projects

Idea Properties



Subject – Idea Name

Idea ID – Idea Unique ID, if auto-numbering is enabled this field is read-only.

Idea Priority – Value (Low, Medium, High) assigned to Idea by the Idea manager.

Description – Functionality and value to users of implementing the idea

Manager – Name of the resource that manages and owns the idea.

Originating Requestor – Name of the resource originating the idea request. By default, the field displays the name of the resource creating the idea.

Allocations

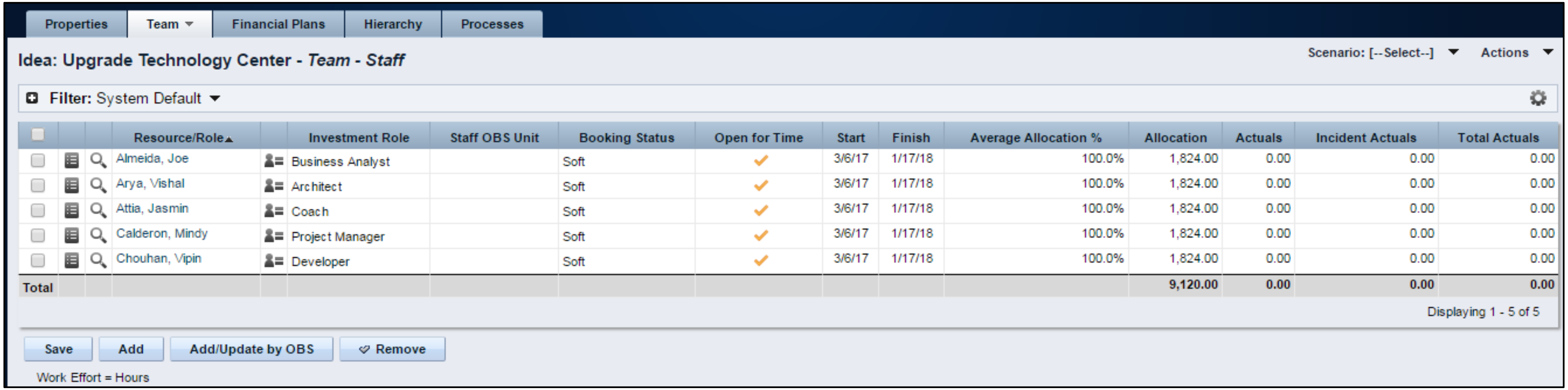
Value

- Maintain awareness and communicate resource demand for the idea
- Can forecast future demand within portfolios for annual planning
- Can use to forecast costs (if setup to do this)

Best Practices

- Keep things simple – this is still just "directionally correct"
- Remember that allocations on ideas create a "secret" task with assignment records for each team allocation – so you can use the assignment slice to report on projects and ideas

Resource Allocations: Team Tab



Resource/Role	Investment Role	Staff OBS Unit	Booking Status	Open for Time	Start	Finish	Average Allocation %	Allocation	Actuals	Incident Actuals	Total Actuals
Almeida, Joe	Business Analyst		Soft	✓	3/6/17	1/17/18	100.0%	1,824.00	0.00	0.00	0.00
Arya, Vishal	Architect		Soft	✓	3/6/17	1/17/18	100.0%	1,824.00	0.00	0.00	0.00
Attia, Jasmin	Coach		Soft	✓	3/6/17	1/17/18	100.0%	1,824.00	0.00	0.00	0.00
Calderon, Mindy	Project Manager		Soft	✓	3/6/17	1/17/18	100.0%	1,824.00	0.00	0.00	0.00
Chouhan, Vipin	Developer		Soft	✓	3/6/17	1/17/18	100.0%	1,824.00	0.00	0.00	0.00
Total								9,120.00	0.00	0.00	0.00

% Allocation - Displays the team member percent allocation to the idea. Each staff member is assigned to the idea at 100 percent of the resource available time by default

Allocation - Displays the number of hours the resource has been tentatively booked to the idea. Unless you change the booking dates, staff members are automatically booked for the entire duration of the idea.

Cost/Budget Planning

Value

- Best place to get idea-level financial information
- Allows use in portfolios and decision making process for project selection

Best Practices

- Keep it light – you do not have enough information at this stage to have accurate costs – remember this is a +- 100% usually at this stage
- Don't try to fully mimic finance business case excel sheet – maybe import?
- Be consistent on the types of costs you plan to forecast (i.e. labor/non labor)

Cost /Budget Plans

								Planned & Actual Costs		
	Cost Type ▲	Transaction Class	Total Cost	Actual Cost	Cost Variance	% Total		2016-01	2016-02	2016-03
☐	Capital	External Labor	2,000.00 USD		2,000.00 USD	8.16%	Cost Actual Cost	2,000.00 USD	0.00 USD	0.00 USD
☐	Capital	Internal Labor	6,000.00 USD	3,000.00 USD	3,000.00 USD	24.49%	Cost Actual Cost	6,000.00 USD 3,000.00 USD	0.00 USD 0.00 USD	0.00 USD 0.00 USD
☐	Operating	External Labor	6,000.00 USD		6,000.00 USD	24.49%	Cost Actual Cost	750.00 USD	4,200.00 USD	1,050.00 USD
☐	Operating	Internal Labor	10,500.00 USD		10,500.00 USD	42.86%	Cost Actual Cost	1,800.00 USD	6,480.00 USD	2,220.00 USD
Total Planned Cost			**24,500.00 USD**					**10,550.00 USD**	**10,680.00 USD**	**3,270.00 USD**
Total Actual Cost				**3,000.00 USD**				**3,000.00 USD**	**0.00 USD**	**0.00 USD**
Variance					**21,500.00 USD**			**7,550.00 USD**	**10,680.00 USD**	**3,270.00 USD**

Conversion to Other Investments

Value

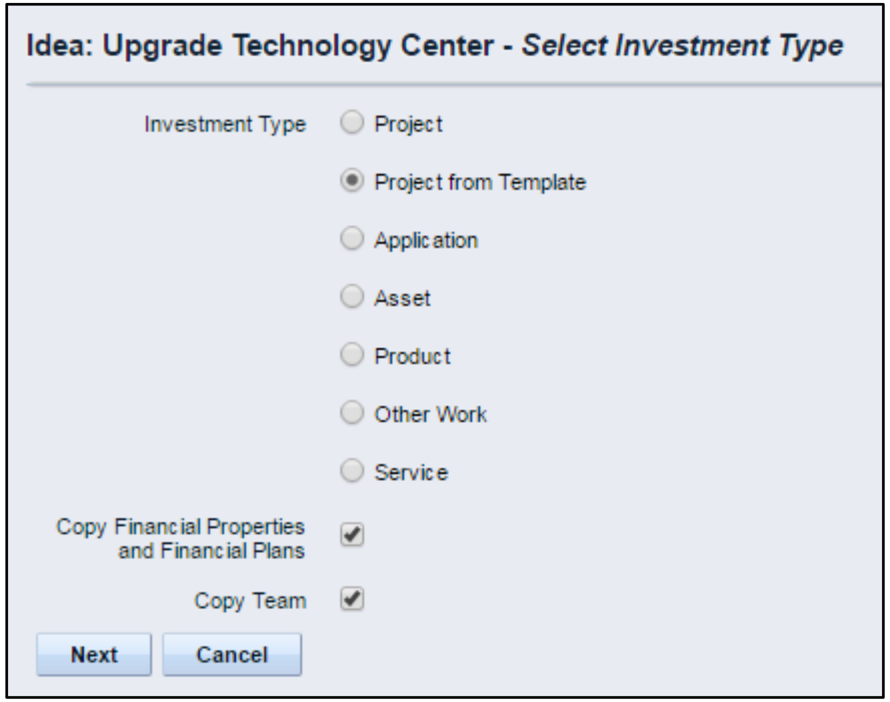
- Separate intake form execution
- Easily copy cost plans and resource plans to new project
- Gain approvals before ideas become official work

Best Practices

- Must be in an approved status to convert
- Use a template when converting
- Put fields common between idea and project on Investment object – I recommend all fields put on investment in case you want to use ideas later

Idea Conversion to Other Investments

With the appropriate access rights, you can convert your approved ideas into projects, services, or investments.



Convert an Idea into an Investment

1. Open an approved idea.
2. Click Convert.

The Select Investment Type page appears.

Note: The investment types listed on the page are based on your access rights.

3. Select an investment type.

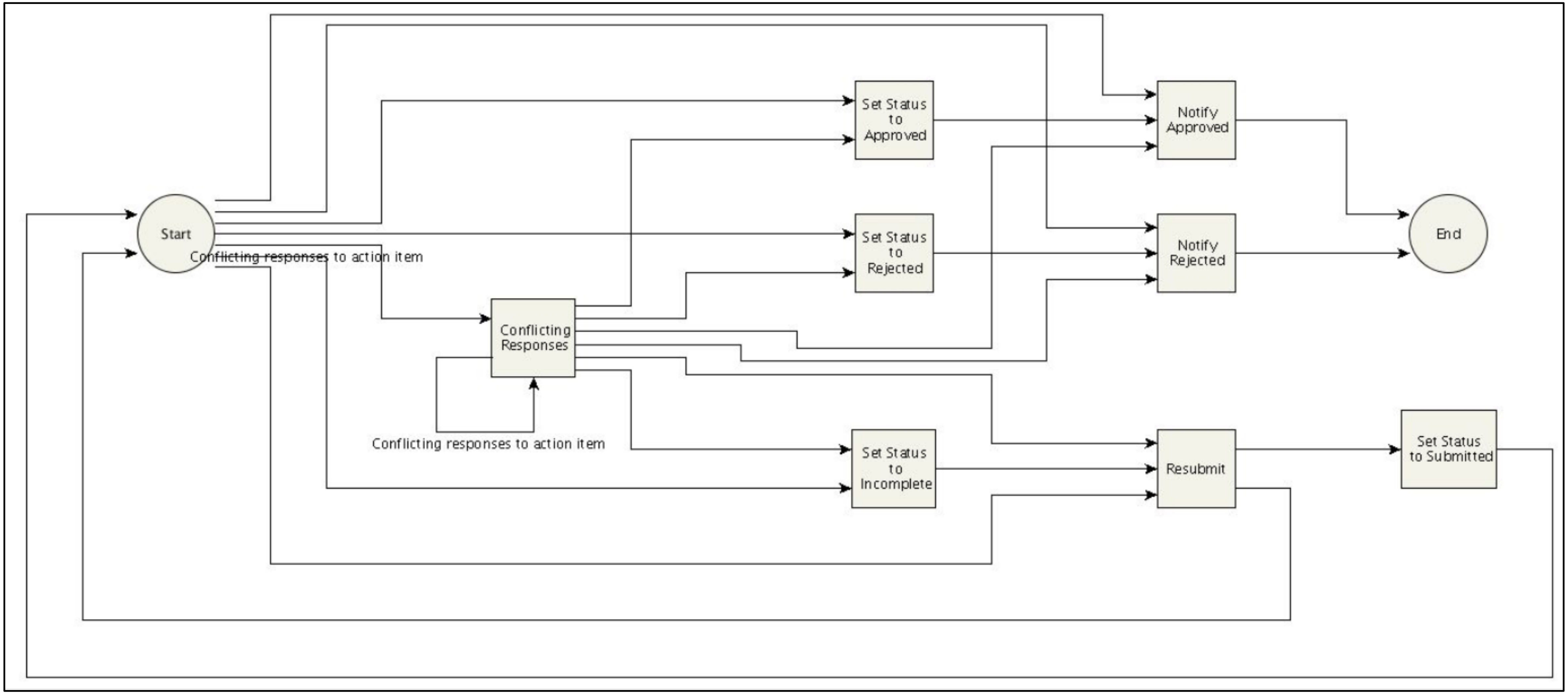
When you select Project from Template, project properties, such as budget data, transfer to the idea. The properties transferred from the idea generally supersede the properties from the project template. After you convert the idea into a project, you can modify the project properties.

4. Select Copy Financial Properties and Financial Plans to include the financial data for the idea in the conversion to an investment.
5. Click Next.

The create page appears.

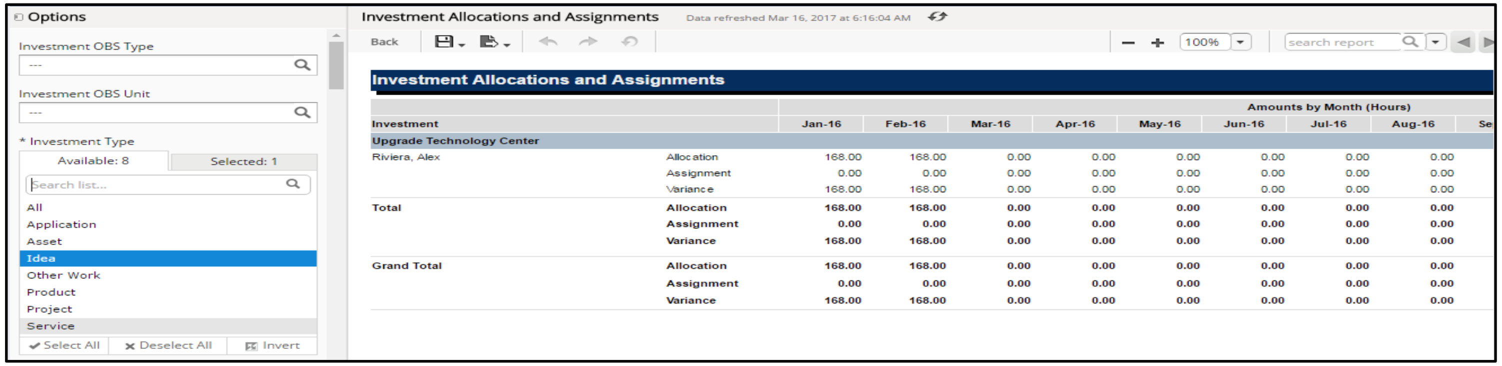
6. Complete the fields on the page, and click Save.

Conversion Process to Project



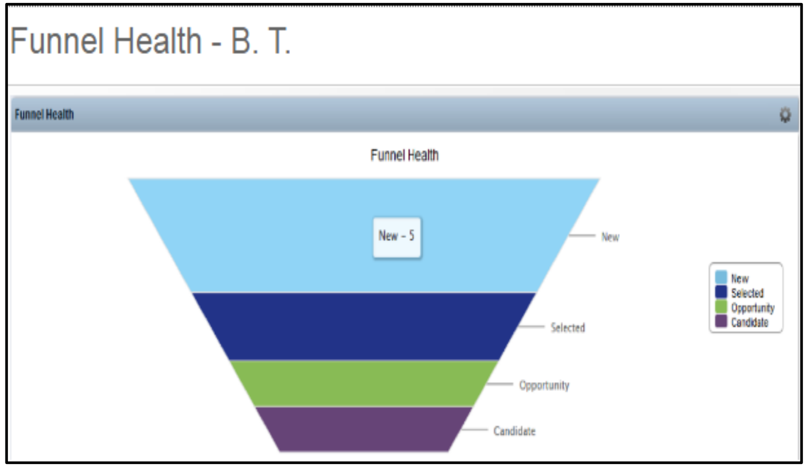
Reporting

OOB reporting on Ideas

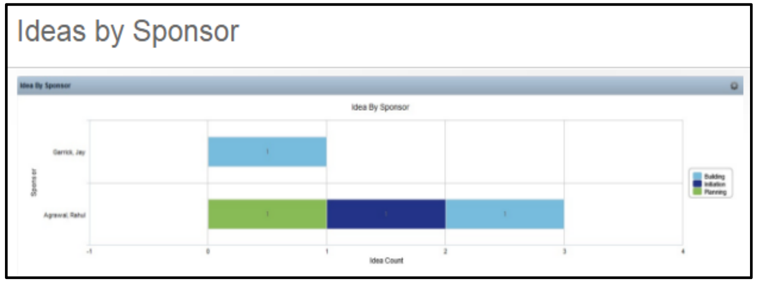


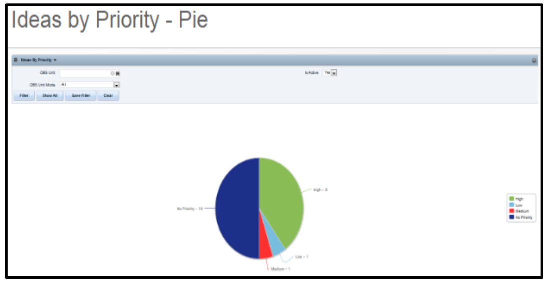
		Amounts by Month (Hours)							
Investment		Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16
Upgrade Technology Center									
Riviera, Alex	Allocation	168.00	168.00	0.00	0.00	0.00	0.00	0.00	0.00
	Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Variance	168.00	168.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	Allocation	168.00	168.00	0.00	0.00	0.00	0.00	0.00	0.00
	Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Variance	168.00	168.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	Allocation	168.00	168.00	0.00	0.00	0.00	0.00	0.00	0.00
	Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Variance	168.00	168.00	0.00	0.00	0.00	0.00	0.00	0.00

RegoXchange reporting on Ideas



Funnel Chart displays aggregated counts of Ideas by "Idea Progress", a custom attribute. Chart shows Idea Progress names in legend, and count total is available as a mouse-over.





Part IV:
ServiceNow to CA PPM

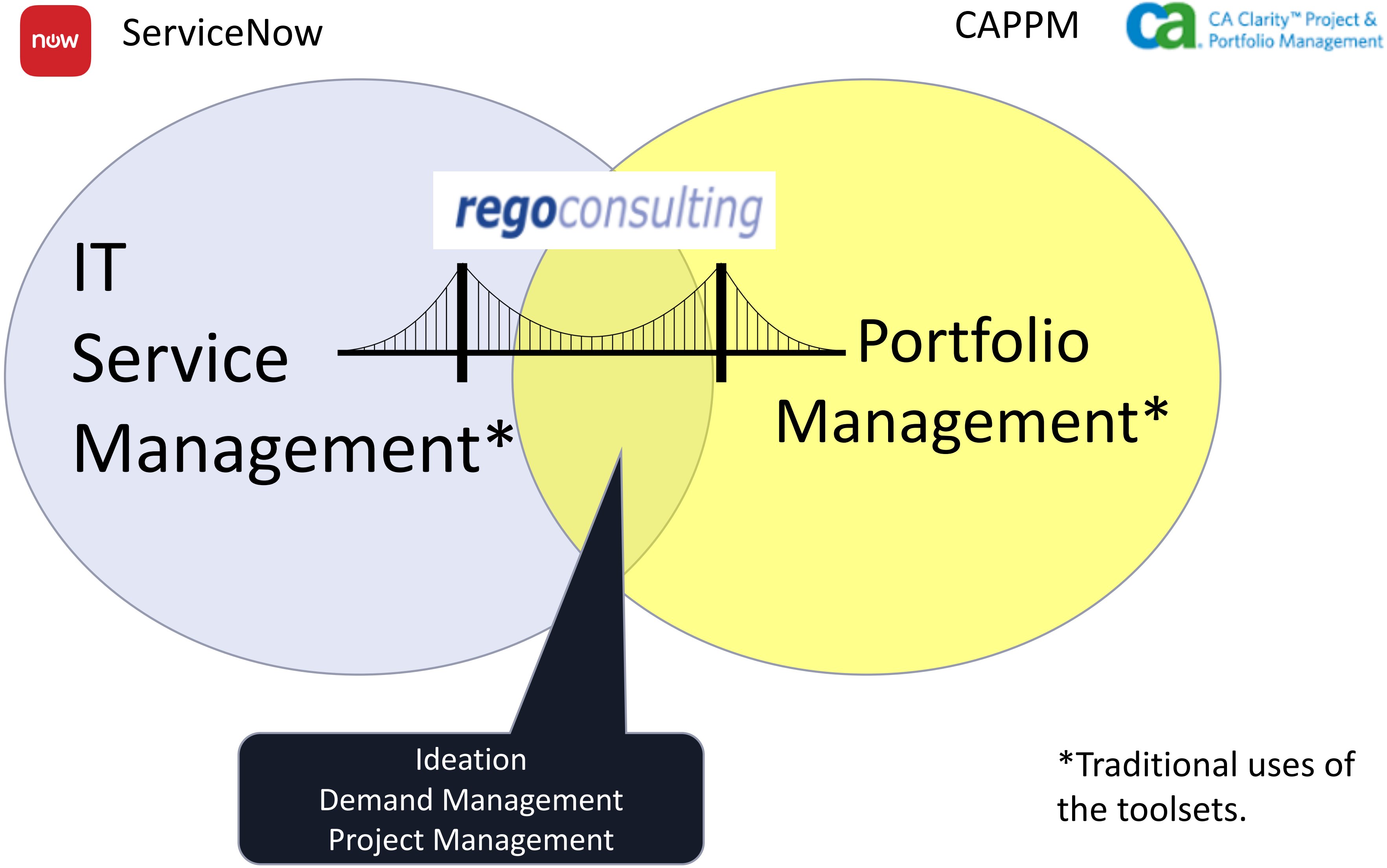
ServiceNow to CA PPM

Part IV
Agenda

Open Mic

- How many have ServiceNow within your organization?
- Are you using Ideas/Demand at all within your project initiation?

Demand Management - Tools



*Traditional uses of the toolsets.

Demand Feature Compare

Features	ServiceNow	CA PPM
Service Catalog	**Yes**	**No**
Ideation / Intake Management	Yes	Yes*
Stakeholder Assessments / Screening	Yes	No
Resource Plans	**Yes**	**No**
Qualification / Cost Plans	Yes	Yes
Workflow Approvals	Yes	Yes
Notifications and Email Approvals	Yes**	Yes

*Idea is a combined object with Demand elements. ServiceNow allows for easy customer entry and Business handling prior to IT estimation. IT only has to look at what the Business has already approved. (less noise)

** While both tools have notifications and email approvals, the platform in ServiceNow makes that easy and the ability to approve/capture emails is native.

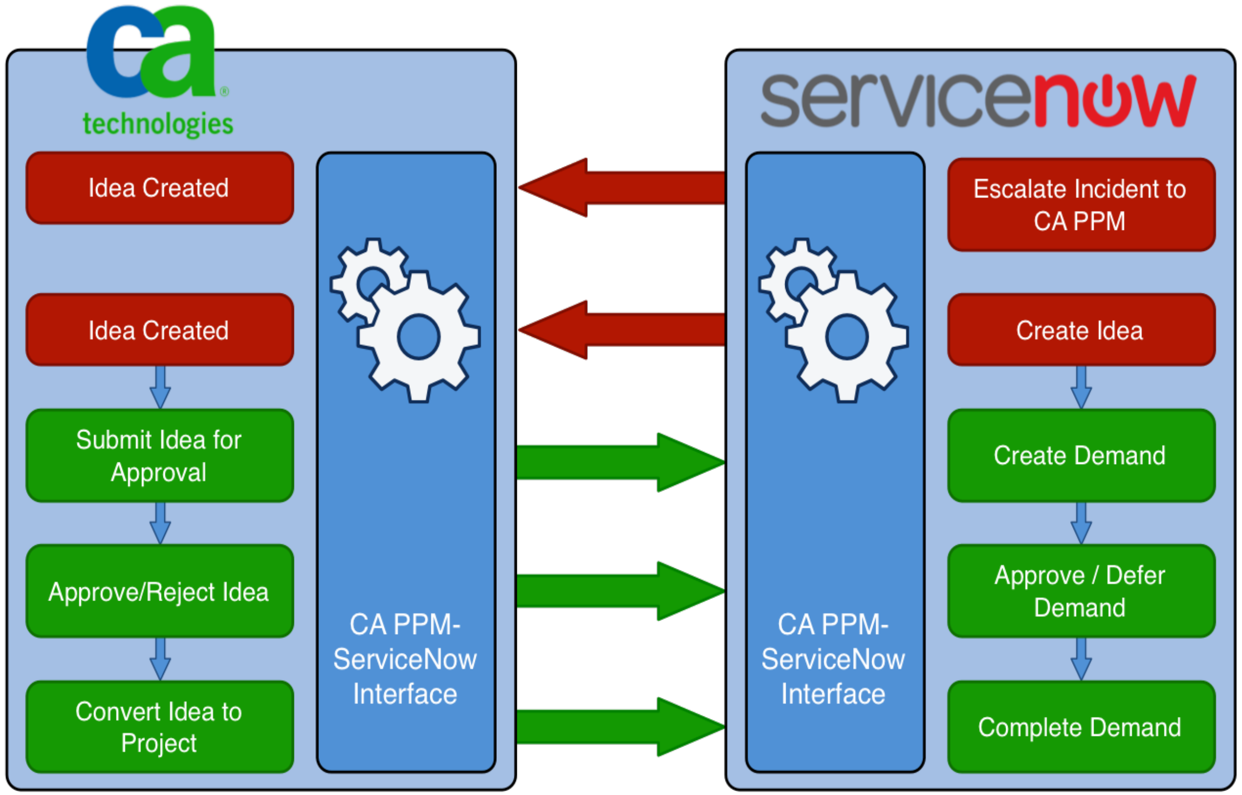
Using ServiceNow for Demand

Possible reasons for ServiceNow / CA PPM integration:

- Users may already be using ServiceNow for ITSM requests, expanding to initiate CA PPM Demand may lead to higher adoption
- Initial work capture occurs in ServiceNow and is manually entered into CA PPM
- The use of ServiceNow to capture demand increases usage of CA PPM within the organization
- Create a unified process for end users, removing dual entry and tracking
- Traceability of ITSM service based requests to Projects within CA PPM

General Functionality

- Real-time interface thru SOAP
- CA PPM Ideas from ServiceNow Incidents and Idea (Red)
- CA PPM Updates ServiceNow Demand (Green)



*Rego is a Certified ServiceNow partner and is authorized to Build, Test and Certify Applications on the ServiceNow platform.

Premier Partner

Part V: Wrap Up

Wrap Up

- Challenges
- Rego Keys to Success
- Questions

Part V Agenda

Common Challenges

- Business users are not in CA PPM, or there are higher costs to move them into CA PPM vs. SharePoint, etc.
- Where does ITSM end and CA PPM start?
- How do I deal with different approval processes that always change and have exceptions?
- How do you decrement Idea demand once converted to a Project? Do you remove it? Make Idea Inactive?
- Ideas only have one line on a timesheet, and the actuals do not move to the project.

Keys to Success

- Easier is better
  - Keep the Idea simple and direct
  - Use a link to document management tool to manage business case
  - Only capture metrics on the Idea that need to move to the project/relevant for reporting or process support
- Create an Approval Process
  - Build a custom process to align to your organizational needs
  - Note: resources set up to approve an Idea for conversion must have Project Create access rights (typically automated or done by PMO)
    - Rego has done workarounds for this function
- Draw the Lines Up Front
  - Draw the intake lines between PPM, ITSM, SharePoint, or other Tools

Questions?

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Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button

Let us know how we can improve!
Don't forget to fill out the class survey.

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