



*rego*University 2019

SAN DIEGO

Demand Management – OOTB Introduction

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Introductions

2

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



Agenda

- Introduction
- Incidents
- Ideas in the Classic UX
- Ideas in the New UX

Part I: Introduction

Discuss Rego Base Configuration
Overview of Demand Management



Let Rego be your guide.

Rego Base Configuration

- This demo environment has Rego's OOTB Base Configuration applied
- The base configuration is composed of 3 main activities:
 - Base setup of items – entity, fiscal periods, financial class fields with 1 value, data mart and other jobs, etc. without this, most of the OOTB views and jobs will not work.
 - Simplify the UI – Based on what we have seen with hundreds of implementations, we “hide” not delete certain OOTB fields and leave the most common fields. For example, Risk has about 50 fields, but most clients use only about 10. Another example is that project has 6 subpages with hundreds of fields, and most clients simplify to 2 subpages and about 50 fields. This is just for the initial sessions, after which, if the client needs them, we can unhide other OOTB fields. Status report is another example where there are about 20 fields and we hide 6 of them that 95% of our clients do not use.
 - Install several Rego accelerators for security groups, workflows, and portlets. We adjust the menu to include them – views that are most commonly used.

What is Demand Management

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



Clarity provides two avenues to manage Demand: Incidents and Ideas

NOTE: Both require only a viewer license

Value of Demand Management

- Standardization of Intake forms across Lines of Business
- 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
- Digitizing the capture of Ideas in a single system – one source of truth
 - No more spreadsheets/versions
- Automating the approval process for demand that will become projects
- Use of Incidents can reduce the number of investments



Demand Component Details

Incidents

- Only available in the Classic UX
- 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

- Available in the Classic UX and the New UX
- 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

NOTE: Both objects only require a VIEWER license for creation and edit

Part II: Incidents



Let Rego be your guide.

Incident Properties

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Create Incident

General

CATEGORY

STATUS

New

TRACKING ID

WR0003

TYPE

Incident

SHORT DESCRIPTION

WORK TYPE

CREATED BY

TARGET RELEASE

ESTIMATED TOTAL EFFORT (HOURS)

Description

NAME

Garvey, Sara

DETAILED DESCRIPTION

MIGRATION STEPS

ATTACHMENT

Browse...

No file selected.

SAVE

SAVE AND RETURN

RETURN

Required

Enter Once

Unique

Conversion to Projects/Tasks

The screenshot shows the 'Incident: WR0003 - Incident Properties' form. The 'General' tab is active. The 'ASSIGNED PROJECT MANAGER' field is highlighted with a red box, showing 'Garvey, Sara'. The 'FLAGGED FOR CONVERSION' checkbox is also checked and highlighted with a red box. At the bottom, the 'CONVERT TO TASK' and 'CONVERT TO PROJECT' buttons are highlighted with a red box.

Incident: WR0003 - Incident Properties

General

CATEGORY: default

STATUS: New

TRACKING ID: WR0003

TYPE: Incident

SHORT DESCRIPTION: Sample Incident

WORK TYPE:

CREATED BY: Garvey, Sara

TARGET RELEASE:

ASSIGNED TO: Garvey, Sara

ESTIMATED TOTAL EFFORT (HOURS):

ASSIGNED PROJECT MANAGER: Garvey, Sara

FLAGGED FOR CONVERSION: ☒

Description

DETAILED DESCRIPTION: This is a sample incident

NAME: Garvey, Sara

MIGRATION STEPS:

ATTACHMENT: No file selected.

Resolution

RESOLVED DATE:

SAVE SAVE AND RETURN CONVERT TO TASK CONVERT TO PROJECT RETURN

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 new Project, or to a Task on an existing Project
 - Details from the incident page are replicated on the Create Project or Create Task page.

See table at right for 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)

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

Category Setup | Priority Setup | Assign Investment | Processing Errors

Incident Category Setup

Filter: None

Category Name: Description:

Category ID: Power Filter: (Build Power Filter)

Filter Show All Save Filter Clear

Category	ID	Description
<input type="checkbox"/> Business Applications Under SCM	SCM_ITIL_BA	Business applications under SCM using ITIL methodology
<input type="checkbox"/> Desktop & Laptop	Desktop & Laptop	Desktop & Laptop
<input type="checkbox"/> Network	Network	Network
<input type="checkbox"/> Servers	Servers	Servers

Save New

- 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 Clarity enhancement requests and break fix
 - Allows users to enter Clarity based requests directly in the application
 - Clarity admin team can manage updates within Clarity and use for communication back to requester

Incident Reporting

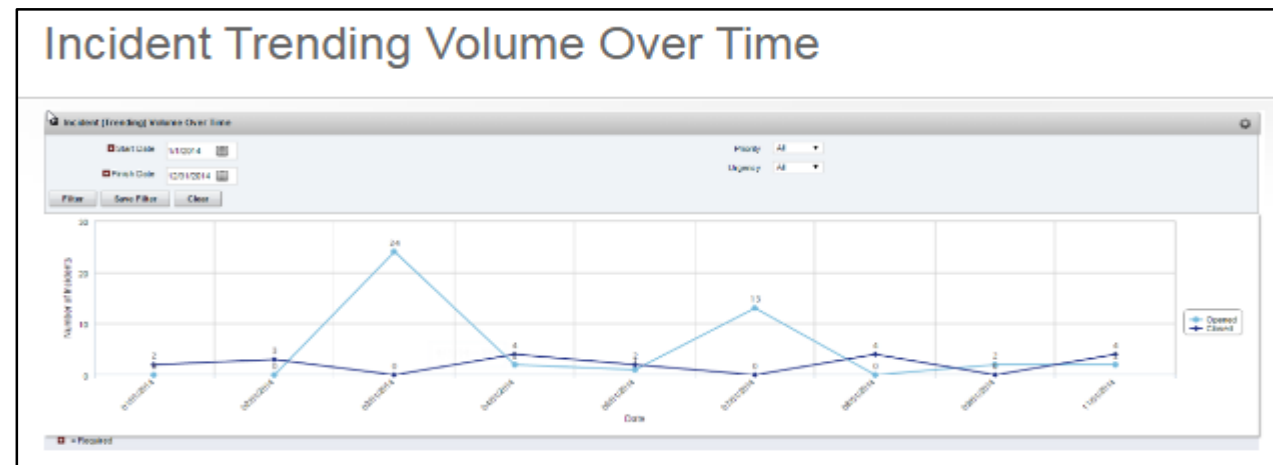
14

OOTB reporting on Incidents

Assigned to Me Reported by Me Reported by Others										
Incident List										
+ Filter: None										
<input type="checkbox"/>	Short Description	Tracking ID	Assigned To	Category	Status	Flagged for Conversion	Urgency	Impact	Priority	Created Date
<input type="checkbox"/>	Error on Submit of Banking Transaction	IN1000	Greer, Jessica	Business Applications Under SCM	New		High	High	High	5/9/16
<input type="checkbox"/>	Supply Chain Application Performance	IN1002	Zywiec, David	Business Applications Under SCM	New		Medium	Medium	Medium	5/9/16
<input type="checkbox"/>	Supply Chain Datamart Performance Issue	IN1004	Calderon, Mindy	Business Applications Under SCM	New		Medium	Medium	Medium	5/9/16
										Displaying 1 - 3 of 3
Save New Reassign Convert to Task Convert to Project										

RegoXchange reporting on Incidents

All Incidents										
Subject: <input type="text"/> Urgency: All Priority: All Impact: All Expected Resolution Date: <input type="text"/> to <input type="text"/> Power Filter: (Build Power Filter)										
Filter Show All Save Filter Clear										
DASH	Incident ID	Subject	Assigned To	Status	Urgency	Priority	Impact	Estimated Effort	Expected Resolution Date	Reported By
	another_closed_incident	Another Closed Incident	America	Closed				30	21.3.2013	Batman, Lam
	INC001	Asia Plan Transistor Dolphin Language Error	Batman, Lam	Closed				10	17.4.2013	Batman, Lam
	INC006	Bat Cave Data Center Power Surge	Batman, Lam	New				25	4.5.2013	Batman, Lam
	INC004	Bat Signal propelling kiten	Women, Wonder							
	INC009	Bathouse On Invalide Jet is Visible	Zywiec, David							
	INC02	Broken Wall	Reynolds, Clayton							
	cer_test_1	CER - Test Incident	Administrator, Nike							
	test_inc	CER Test Incident	Administrator, Nike							
	closed_incident	Closed Incident	Batman, Lam	Work in Progress				20	30.4.2013	Administrator, Nike
	convert	Convert Incident to task								
										Displaying 1 - 10 of 30



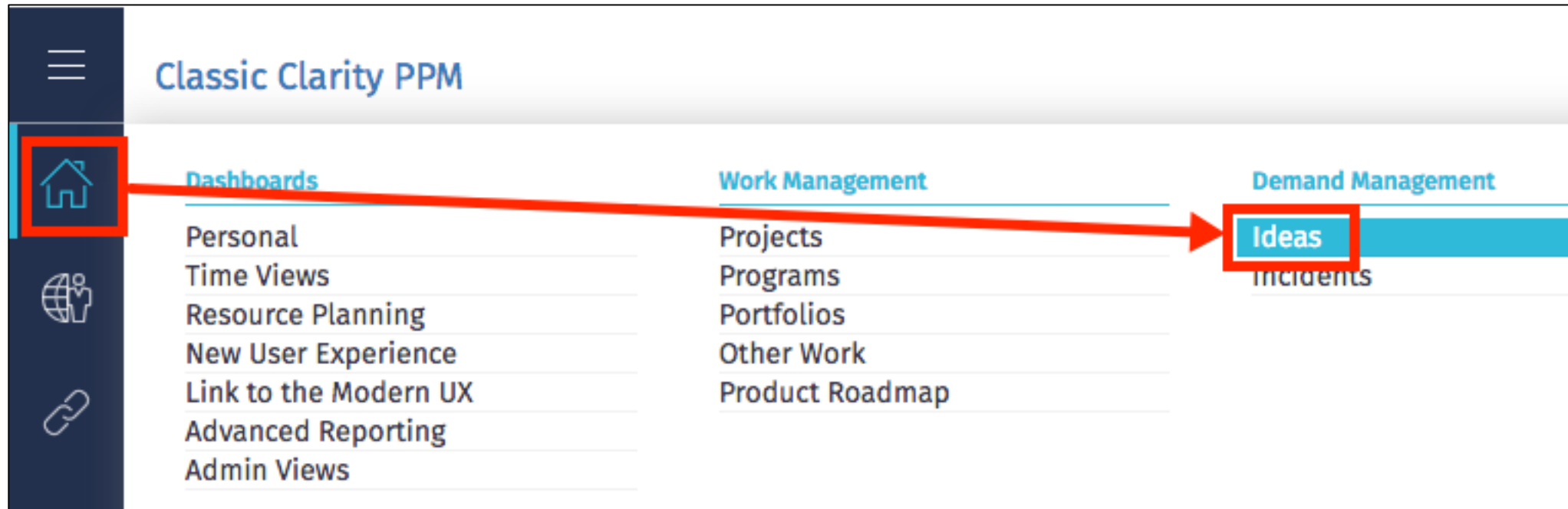
Part III: Ideas in the Classic UX



Let Rego be your guide.

Accessing Ideas

- To access ideas, hover over Home, then click Ideas under Demand Management
 - Note that navigation bar links and section headers may be different depending on how your Clarity administrator has configured the interface, and that screenshots here have been taken in the Phoenix UI Theme.
 - Also be aware that access depends on having the correct security rights (PMs typically have more access than team members who just enter time)



Idea List view displays all the Ideas the end user has access to and is divided into two sections

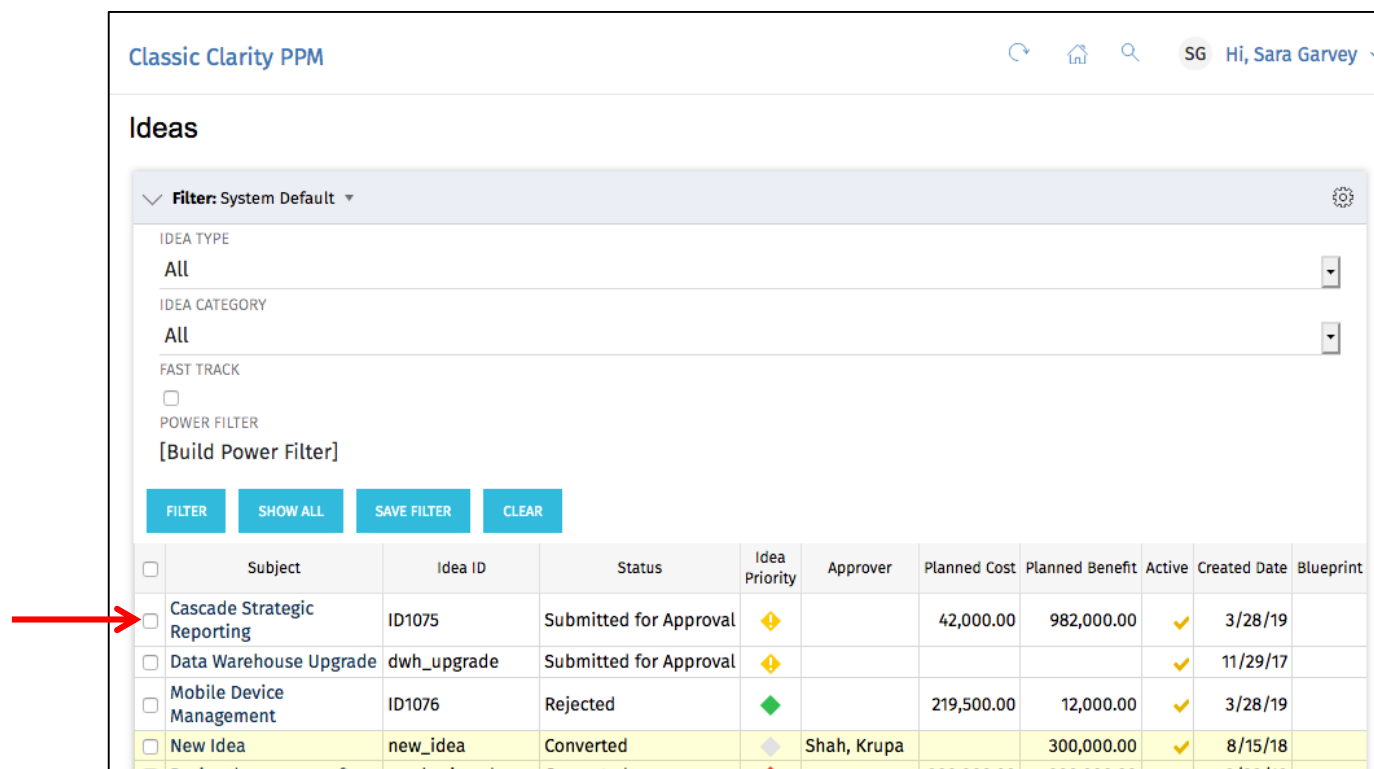
- Click the + sign to Expand the Filter if it is collapsed by default
 - The top portion of the screen is a filter allowing you to search Clarity for items meeting specific criteria
 - The bottom portion of the screen is the list that displays the results of your filter criteria

The screenshot shows the 'Classic Clarity PPM' interface. At the top, there's a header with 'Hi, Sara Garvey' and a search icon. Below the header is the 'Ideas' section. A red box labeled 'Shows/Hides the filter' points to a dropdown menu currently set to 'Filter: System Default'. Below this are filter options for 'IDEA TYPE' (All), 'IDEA CATEGORY' (All), 'FAST TRACK' (checkbox), and 'POWER FILTER' (Build Power Filter). A red box labeled 'Filter' points to a dropdown menu next to the 'IDEA CATEGORY' filter. Below the filters are buttons: 'FILTER', 'SHOW ALL', 'SAVE FILTER', and 'CLEAR'. A red box labeled 'Click a heading to sort by that value' points to the 'Idea Priority' column header. Below the buttons is a table with columns: Subject, Idea ID, Status, Idea Priority, Approver, Planned Cost, Planned Benefit, Active, Created Date, and Blueprint. A red box labeled 'Filter results display here' points to the table. The table contains four rows: 'Cascade Strategic Reporting' (Submitted for Approval, yellow diamond), 'Data Warehouse Upgrade' (Submitted for Approval, yellow diamond), 'Mobile Device Management' (Rejected, green diamond), and 'New Idea' (Converted, grey diamond, approved by Shah, Krupa).

	Subject	Idea ID	Status	Idea Priority	Approver	Planned Cost	Planned Benefit	Active	Created Date	Blueprint
<input type="checkbox"/>	Cascade Strategic Reporting	ID1075	Submitted for Approval	Yellow Diamond		42,000.00	982,000.00	✓	3/28/19	
<input type="checkbox"/>	Data Warehouse Upgrade	dwh_upgrade	Submitted for Approval	Yellow Diamond				✓	11/29/17	
<input type="checkbox"/>	Mobile Device Management	ID1076	Rejected	Green Diamond		219,500.00	12,000.00	✓	3/28/19	
<input type="checkbox"/>	New Idea	new_idea	Converted	Grey Diamond	Shah, Krupa		300,000.00	✓	8/15/18	

Accessing Ideas

1. Home > Demand Management > Ideas
2. Click on the **+** sign to expand the filter
3. Enter **filter criteria** (optional)
4. Click **Filter**
5. Click on the **Idea Subject** in the list to open the idea



Classic Clarity PPM

Hi, Sara Garvey

Ideas

Filter: System Default

IDEA TYPE
All

IDEA CATEGORY
All

FAST TRACK
☐

POWER FILTER
[Build Power Filter]

FILTER **SHOW ALL** **SAVE FILTER** **CLEAR**

<input type="checkbox"/>	Subject	Idea ID	Status	Idea Priority	Approver	Planned Cost	Planned Benefit	Active	Created Date	Blueprint
<input type="checkbox"/>	Cascade Strategic Reporting	ID1075	Submitted for Approval	⚠		42,000.00	982,000.00	✓	3/28/19	
<input type="checkbox"/>	Data Warehouse Upgrade	dwh_upgrade	Submitted for Approval	⚠				✓	11/29/17	
<input type="checkbox"/>	Mobile Device Management	ID1076	Rejected	🟢		219,500.00	12,000.00	✓	3/28/19	
<input type="checkbox"/>	New Idea	new_idea	Converted	🟡	Shah, Krupa		300,000.00	✓	8/15/18	

- Access to the idea is controlled via Clarity Security Groups:
 - You may have read/write access or read only access to all ideas
 - You may have read/write access to only the ideas you created
 - You may have approval and/or conversion rights
- Security Groups in Base Configuration:
 - Idea Creator
 - Idea Reviewer, Approver and Conversion

PROPERTIES TEAM FINANCIAL PLANS HIERARCHY PROCESSES

Idea: Mobile Device Management - *Properties - Main - General* Scenario: [--Select--]

General

SUBJECT
Mobile Device Management

IDEA ID
ID1076

IDEA PRIORITY
Low

OBJECTIVE
Objective

MANAGER
McCourt, Angela

BUSINESS OWNER
Aeson, Jason

TARGET MANAGER

REQUESTOR
Montanez, Carlos

GENERAL NOTES
Mobile Device Management General Notes

DESCRIPTION
Mobile Device Management Description

SUBMIT FOR APPROVAL SAVE SAVE AND RETURN RETURN



The buttons you see at the bottom of the screen depend on your security rights

Idea Properties

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- Base Configuration
 - New Idea type section
 - Attributes renamed, hidden or moved to other subpages
 - Fields resized
 - Defaults set
 - Properties tab dropdown updated with more concise options

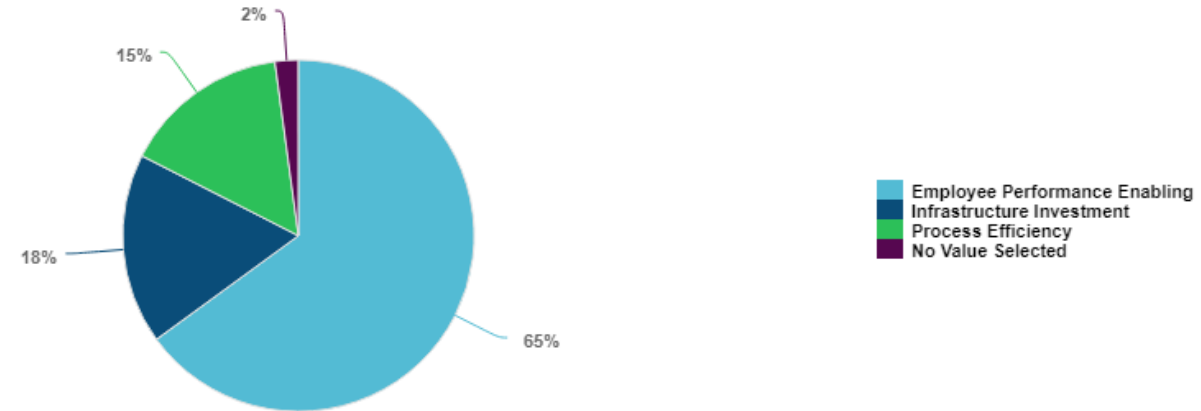
The screenshot displays the 'Idea Properties' form with the 'General' tab selected. The form is organized into several sections:

- Properties:** A dropdown menu on the left lists 'General', 'Schedule', 'Budget', 'Value Metrics', and 'Idea Sub-Object List'. The 'General' option is currently selected.
- Access to this Idea:** A dropdown menu on the right lists 'Full View', 'Resource', 'Group', and 'OBS Unit'.
- General Tab:**
 - IDEA PRIORITY:** A dropdown menu set to 'Low'.
 - OBJECTIVE:** A text field containing 'Objective'.
 - DESCRIPTION:** A text field containing 'Mobile Device Management Description'.
 - STATUS:** A dropdown menu set to 'Rejected'.
 - Idea Type:**
 - IDEA TYPE:** A dropdown menu set to 'Infrastructure Deployment'.
 - IDEA CATEGORY:** A dropdown menu set to 'Desktop'.
 - FAST TRACK:** A checkbox.
 - REQUIRED:** A checkbox.
 - Organizational Breakdown Structures:**
 - DEPARTMENT OBS:** A text field.
 - PROJECT OBS:** A text field.
- MANAGER:** A text field containing 'McCourt, Angela'.
- BUSINESS OWNER:** A text field containing 'Aeson, Jason'.
- TARGET MANAGER:** A text field.
- REQUESTOR:** A text field containing 'Montanez, Carlos'.
- GENERAL NOTES:** A text field containing 'Mobile Device Management General Notes'.
- ACTIVE:** A checkbox that is checked.

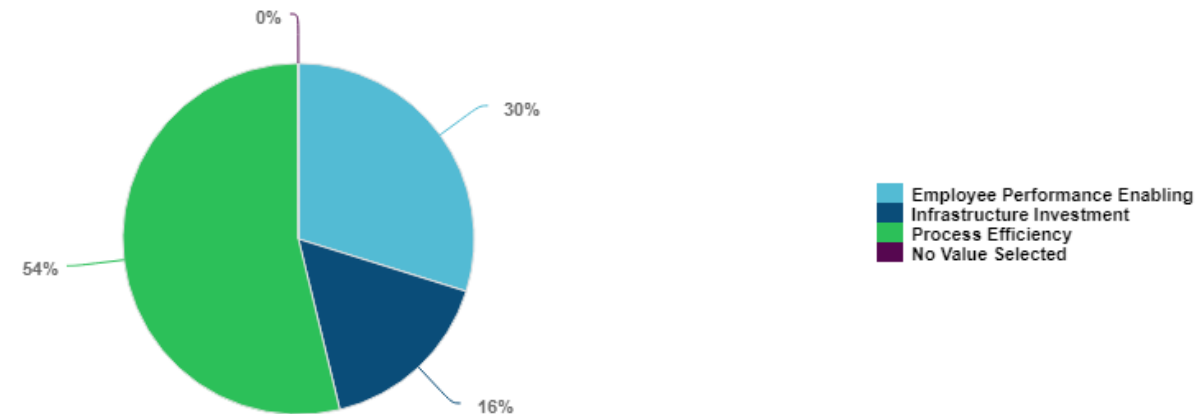
At the bottom of the form, there are four buttons: 'SUBMIT FOR APPROVAL', 'SAVE', 'SAVE AND RETURN', and 'RETURN'. A legend at the bottom left indicates that a red square represents 'Required' and a green square represents 'Unique'.

- There are no standard reports or specialized portlets for Idea tracking.
- However using OOTB Portfolio portlets to gather and review Ideas is a powerful tool.

+ Planned Cost by Goal

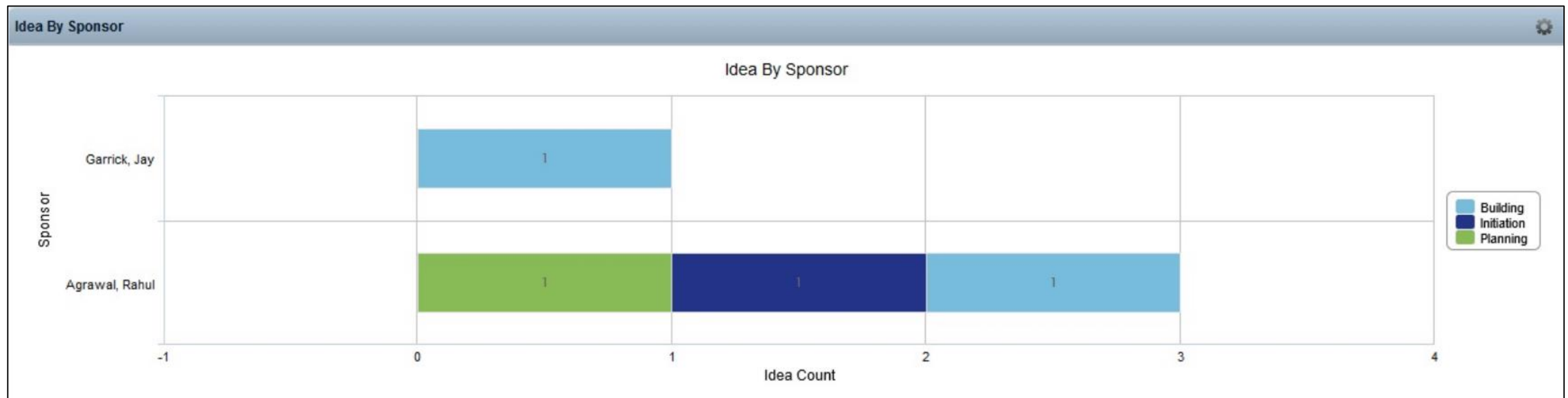


+ Role Demand by Goal



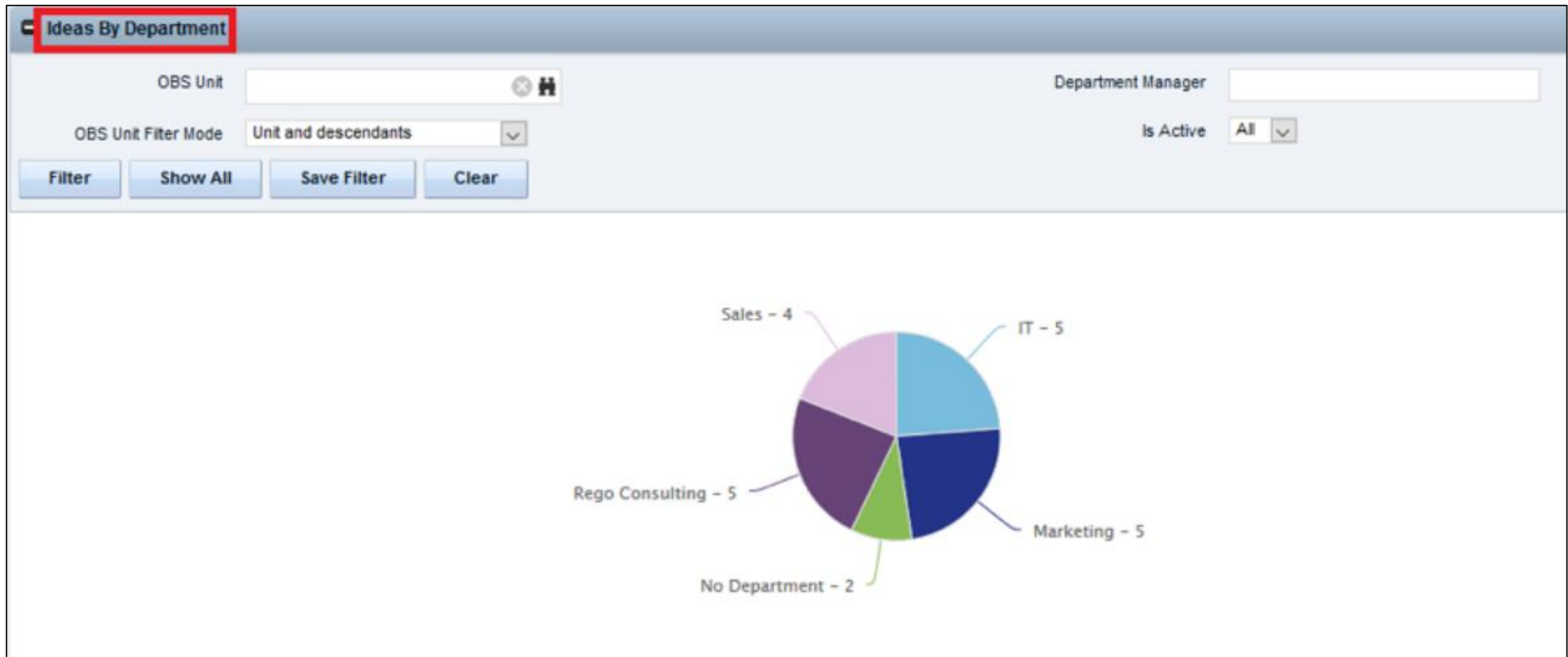
RegoXchange – Sponsor by Stage

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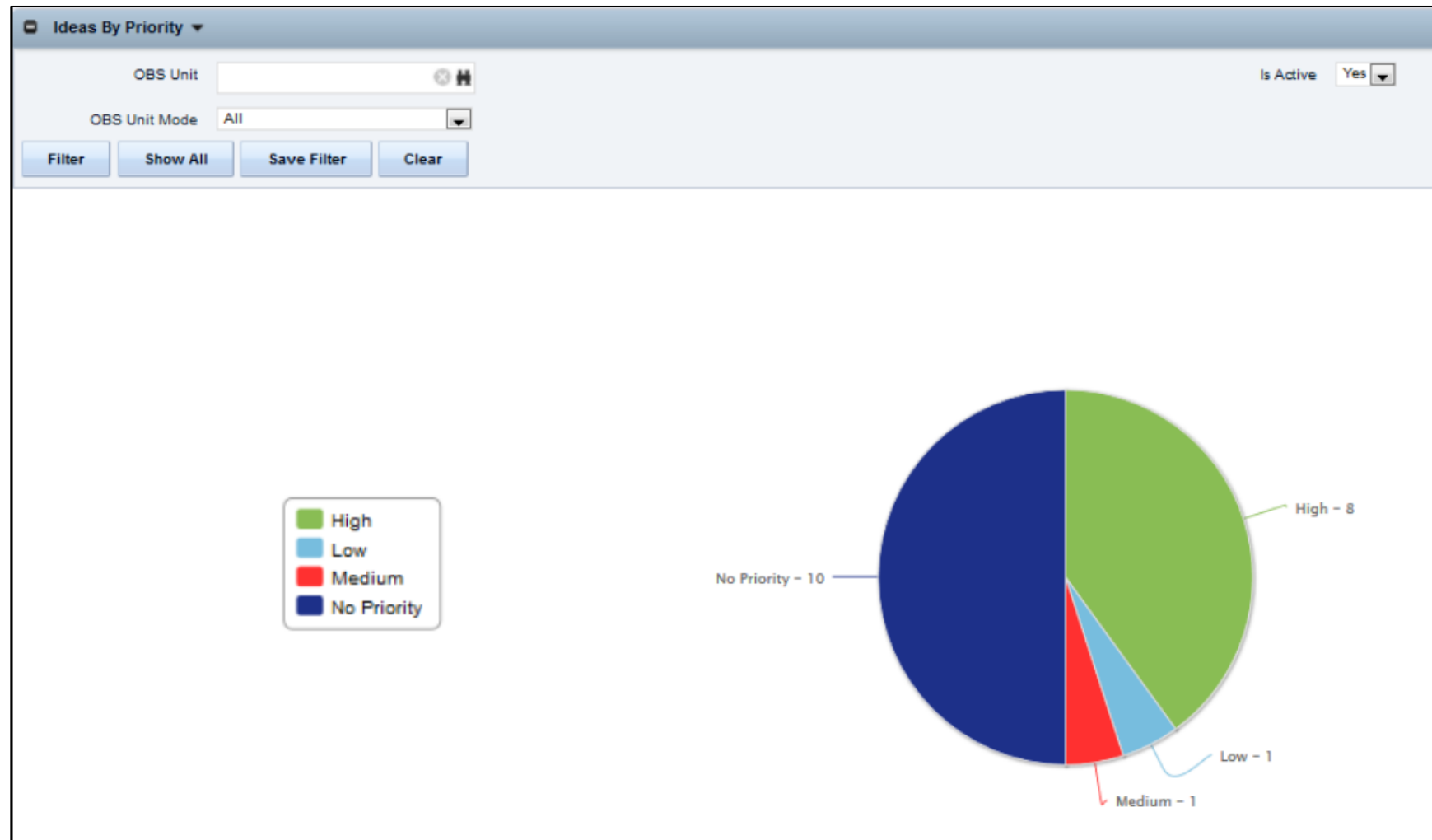
RegoXchange – Ideas by Department

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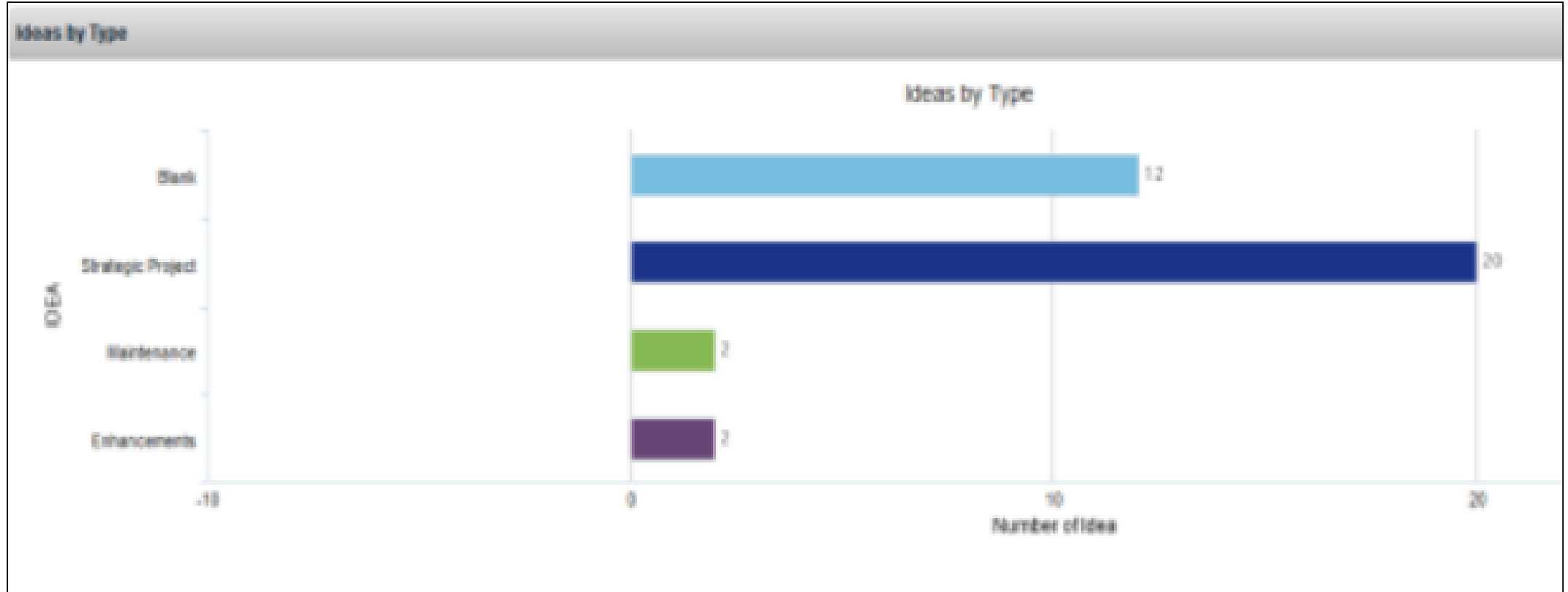
RegoXchange – Ideas by Priority

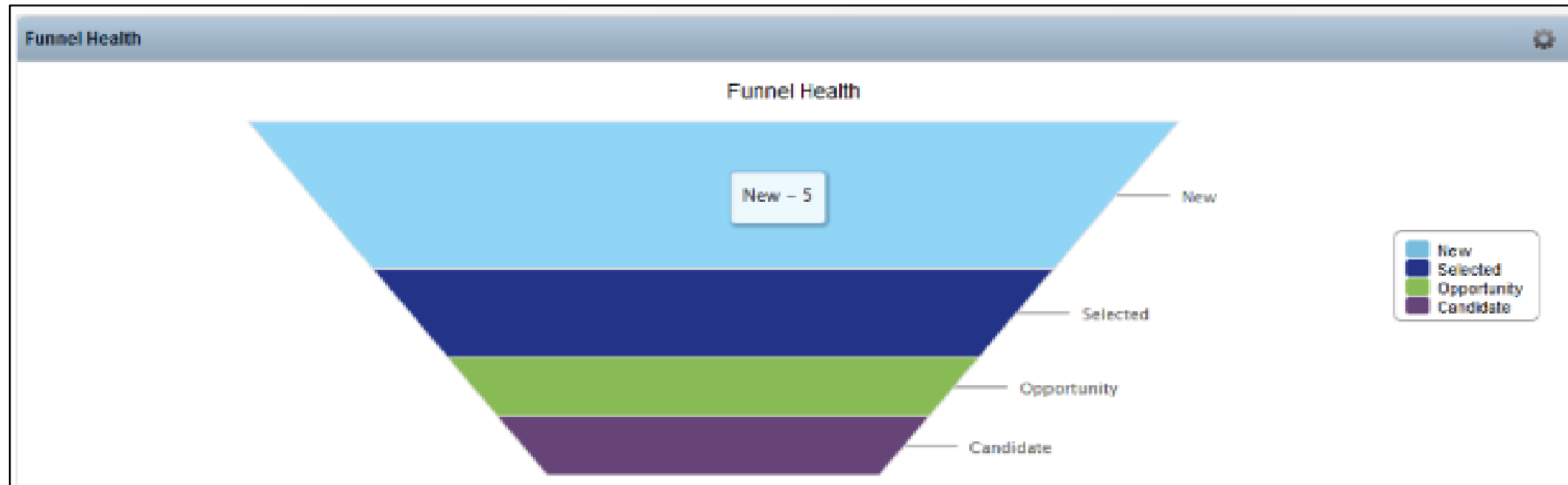
24



RegoXchange – Ideas by Type

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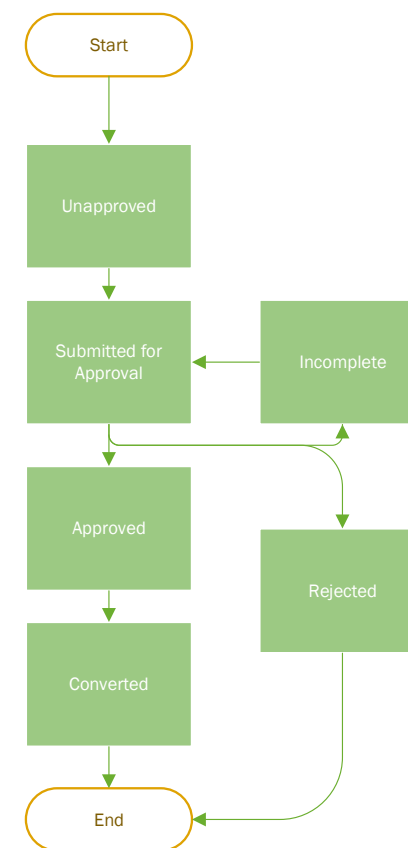




OOTB Approval Workflow

The OOTB Status field is unique in that it follows a set workflow, and the available values are determined by user permissions.

Current Status	Available Status Options
Unapproved	Unapproved (no change) Submitted for Approval
Submitted for Approval	<i>*You can only see these values if you have Approval permissions</i> Approved Incomplete Rejected
Incomplete	Submitted for Approval Approved Rejected
Approved	Can now be converted to a project or other investment <i>*user must have Project Create / Create from Template permission</i>
[after Idea conversion]	Converted (read-only)



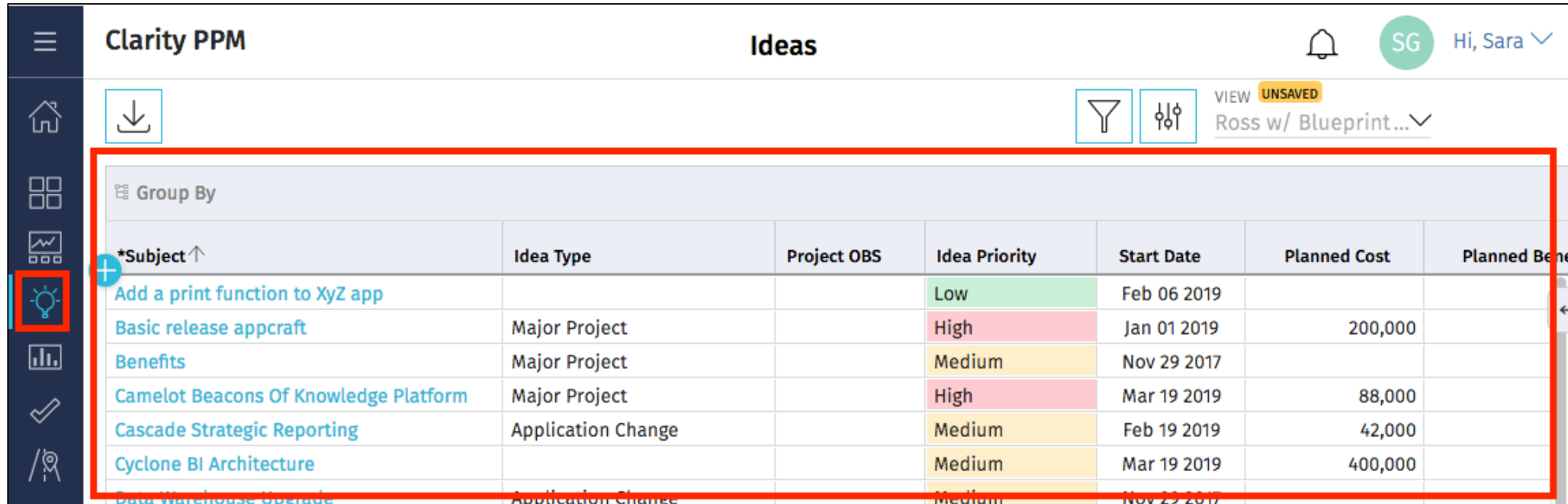
Part IV: Ideas in the New UX



Let Rego be your guide.

New UX Ideas

- Beginning in 15.6, Ideas are available in the New UX (grid only) and in 15.6.1, they are “blueprintable” with an edit page.
- In 15.7, Ideas can be converted to projects.



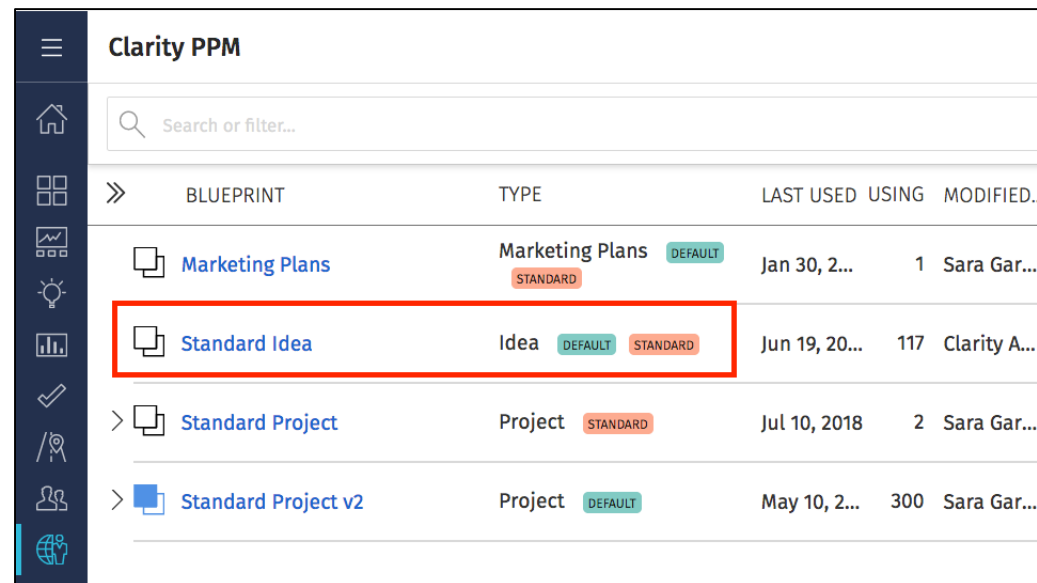
Clarity PPM Ideas

VIEW UNSAVED Ross w/ Blueprint...





Group By	Idea Type	Project OBS	Idea Priority	Start Date	Planned Cost	Planned Benefits
*Subject ↑						
Add a print function to XyZ app			Low	Feb 06 2019		
Basic release appcraft	Major Project		High	Jan 01 2019	200,000	
Benefits	Major Project		Medium	Nov 29 2017		
Camelot Beacons Of Knowledge Platform	Major Project		High	Mar 19 2019	88,000	
Cascade Strategic Reporting	Application Change		Medium	Feb 19 2019	42,000	
Cyclone BI Architecture			Medium	Mar 19 2019	400,000	
Data Warehouse Upgrade	Application Change		Medium	Nov 22 2017		

Blueprints for Ideas

- Blueprints allow Ideas to have an Edit screen in the New UX.
- For now, only a Details page is available – additional pages will be made available in future releases.

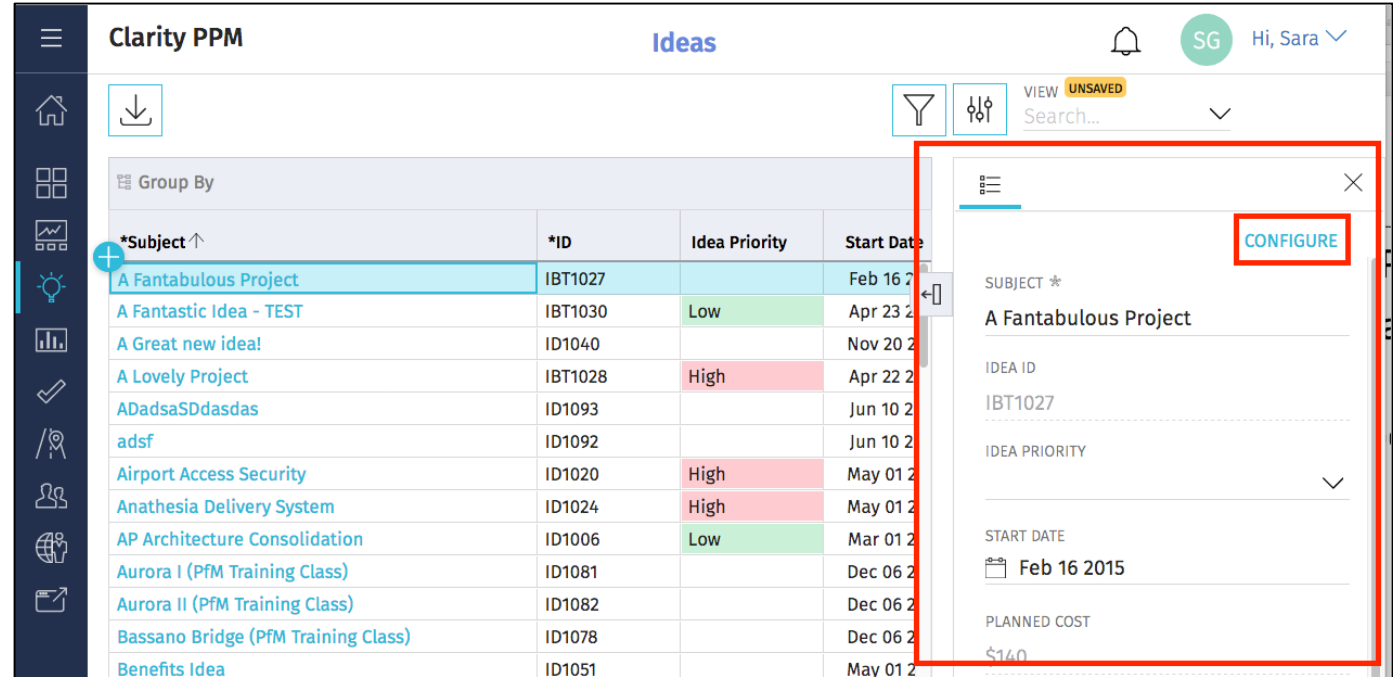


The screenshot shows the Clarity PPM interface with a sidebar on the left containing various icons. The main content area displays a table of blueprints. The table has columns for Blueprint, Type, Last Used, Using, and Modified. The 'Standard Idea' blueprint is highlighted with a red box.

»	BUEPRINT	TYPE	LAST USED	USING	MODIFIED...
	 Marketing Plans	Marketing Plans DEFAULT STANDARD	Jan 30, 2...	1	Sara Gar...
	 Standard Idea	Idea DEFAULT STANDARD	Jun 19, 20...	117	Clarity A...
>	 Standard Project	Project STANDARD	Jul 10, 2018	2	Sara Gar...
>	 Standard Project v2	Project DEFAULT	May 10, 2...	300	Sara Gar...

Details Pane for Ideas

- The user-configurable Details Pane is also available on Ideas.
- Users themselves may determine which fields appear on the panel, and panel configurations can be saved to a view.
- Note that you must first click on an item in the list before the Details Pane will appear.



The screenshot displays the Clarity PPM Ideas interface. On the left is a sidebar with navigation icons. The main area shows a table of ideas with columns: *Subject, *ID, Idea Priority, and Start Date. The first row, 'A Fantabulous Project' (ID: IBT1027), is selected. To the right, a details pane is open, showing fields for SUBJECT, IDEA ID, IDEA PRIORITY, START DATE, and PLANNED COST. A red box highlights the 'CONFIGURE' button in the top right corner of the details pane.

*Subject ↑	*ID	Idea Priority	Start Date
A Fantabulous Project	IBT1027		Feb 16 2015
A Fantastic Idea - TEST	IBT1030	Low	Apr 23 2015
A Great new idea!	ID1040		Nov 20 2014
A Lovely Project	IBT1028	High	Apr 22 2015
ADadsaSDdasdas	ID1093		Jun 10 2015
adsf	ID1092		Jun 10 2015
Airport Access Security	ID1020	High	May 01 2015
Anathesia Delivery System	ID1024	High	May 01 2015
AP Architecture Consolidation	ID1006	Low	Mar 01 2015
Aurora I (PfM Training Class)	ID1081		Dec 06 2014
Aurora II (PfM Training Class)	ID1082		Dec 06 2014
Bassano Bridge (PfM Training Class)	ID1078		Dec 06 2014
Benefits Idea	ID1051		May 01 2015

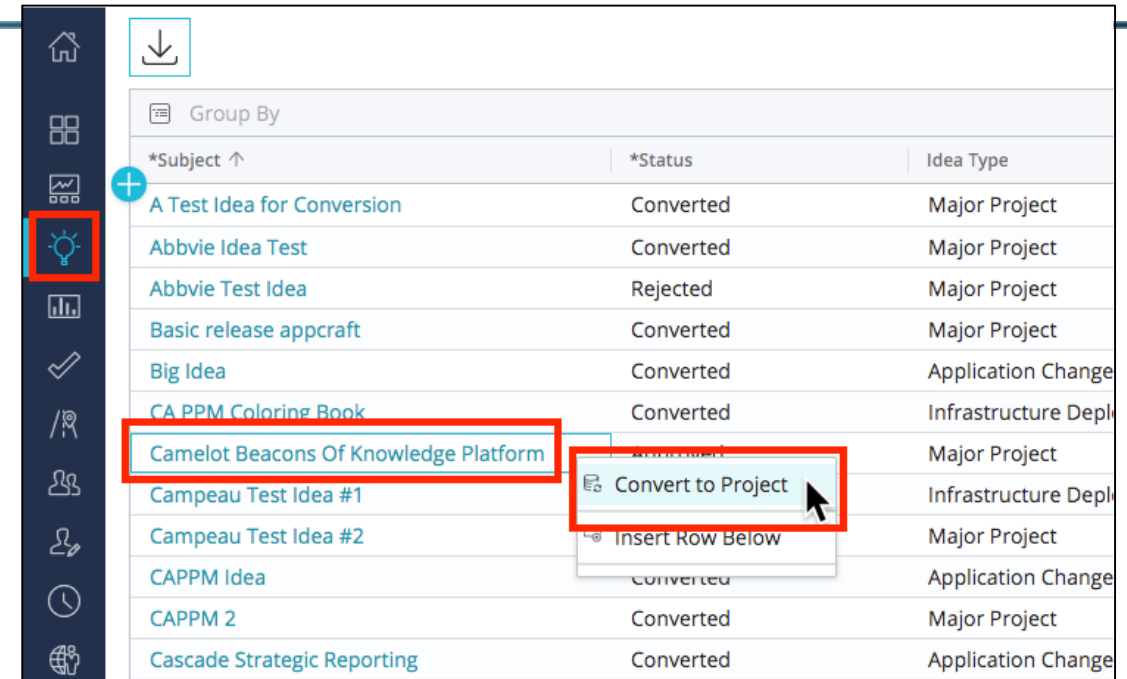
Details Pane for 'A Fantabulous Project':

- SUBJECT *: A Fantabulous Project
- IDEA ID: IBT1027
- IDEA PRIORITY: (dropdown menu)
- START DATE: Feb 16 2015
- PLANNED COST: \$140

Note: Configurations to the *Details* Panel may be saved to a view, and applied by other users.

Convert Ideas to Projects (1)

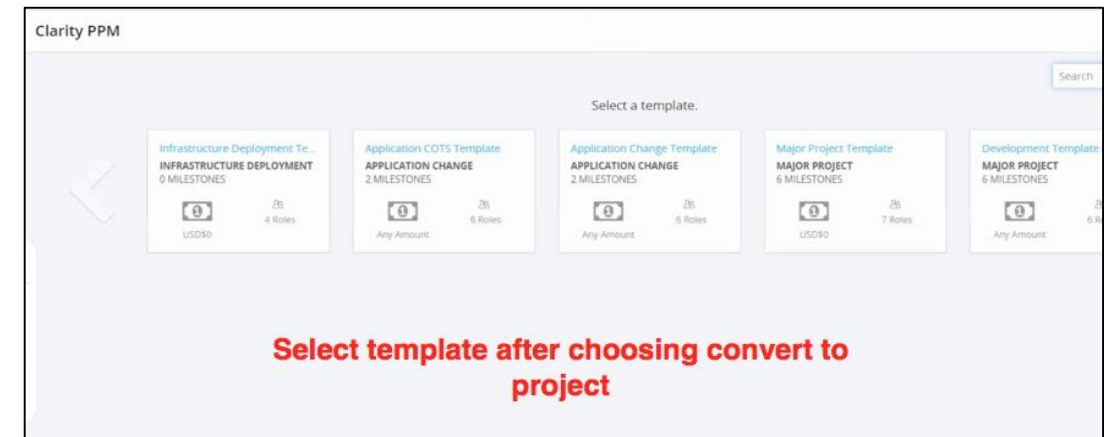
- In 15.7, Ideas in an *Approved* Status may be converted to projects by right-clicking on the Idea.
- Only works for Ideas that are *Approved*.



The screenshot shows the Clarity PPM interface. On the left is a sidebar with icons for Home, Grid, Chart, Idea (highlighted with a red box), Checklist, Report, People, and Time. The main area displays a table of ideas. The idea 'Camelot Beacons Of Knowledge Platform' is highlighted with a red box. A right-click context menu is open over this idea, with the 'Convert to Project' option highlighted by a red box and a mouse cursor.

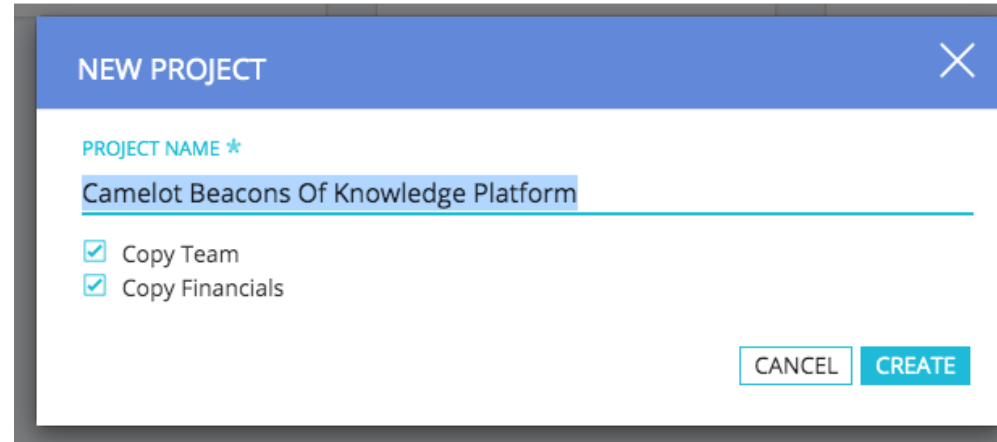
*Subject ↑	*Status	Idea Type
A Test Idea for Conversion	Converted	Major Project
Abbvie Idea Test	Converted	Major Project
Abbvie Test Idea	Rejected	Major Project
Basic release appcraft	Converted	Major Project
Big Idea	Converted	Application Change
CA PPM Coloring Book	Converted	Infrastructure Deployment
Camelot Beacons Of Knowledge Platform	Converted	Major Project
Campeau Test Idea #1	Converted	Infrastructure Deployment
Campeau Test Idea #2	Converted	Major Project
CAPPM Idea	Converted	Application Change
CAPPM 2	Converted	Major Project
Cascade Strategic Reporting	Converted	Application Change

- Select template to be utilized.



Convert Ideas to Projects (2)

- Can copy resources/roles and/or Financials from template.



NEW PROJECT

PROJECT NAME *

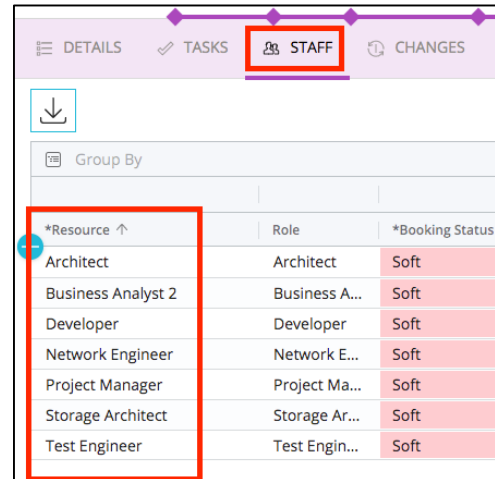
Camelot Beacons Of Knowledge Platform

☒ Copy Team

☒ Copy Financials

CANCEL CREATE

- Any resources, cost Plans etc. from the template will be added to the Project, in addition to Resources, costs, etc. from the Idea. It is additive.



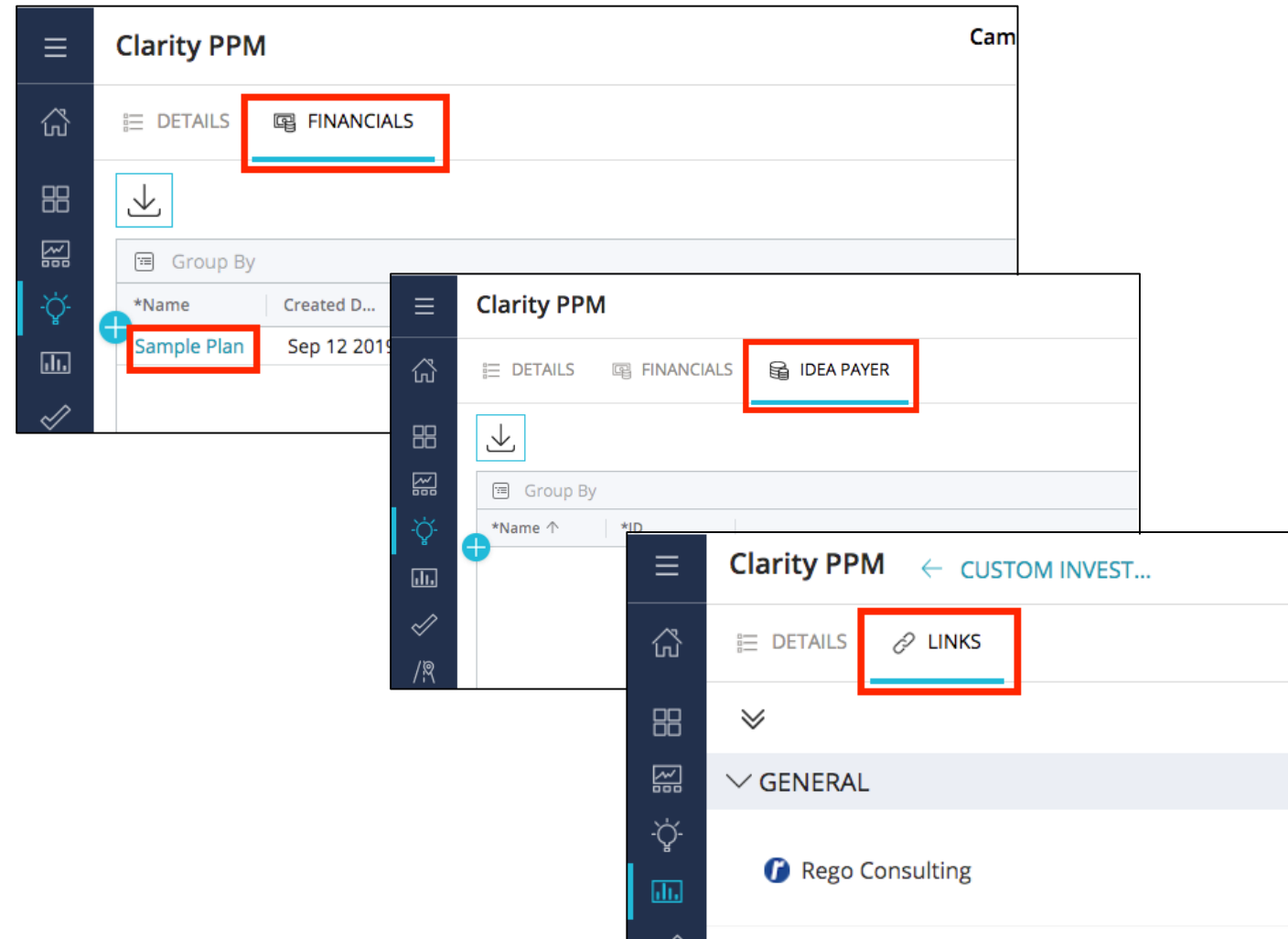
DETAILS TASKS **STAFF** CHANGES

Group By

*Resource ↑	Role	*Booking Status
Architect	Architect	Soft
Business Analyst 2	Business A...	Soft
Developer	Developer	Soft
Network Engineer	Network E...	Soft
Project Manager	Project Ma...	Soft
Storage Architect	Storage Ar...	Soft
Test Engineer	Test Engin...	Soft

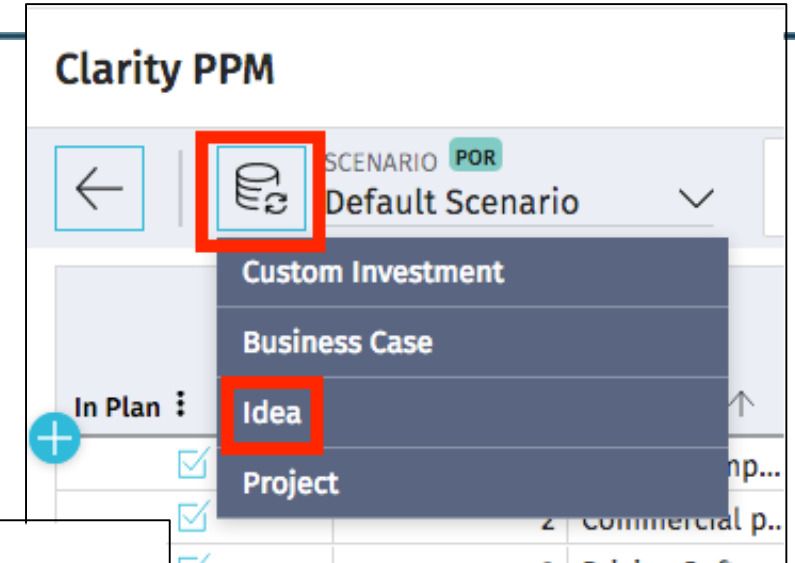
Additional Tabs on Ideas and Custom Investments


- In 15.7, Ideas and Custom Investments have additional tabs available:
 - Financials (Cost Plans Only)
 - Custom Subobjects
 - Links (Custom Investments Only)
- Custom Subobjects must first be API Enabled, then added to a Blueprint.



Include Ideas in Roadmaps

- Beginning in 15.6, Ideas may be included in Roadmaps.
- Date, Capacity and Financial information from the Idea may be synced into the roadmap.



 In Plan :	Roadmap Item*	Linked To T...	Must Have	Start
<input type="checkbox"/>	Genius Upgrade Part 2	Project	Required	Sep 25
<input type="checkbox"/>	Genius Upgrade	Project	Required	Mar 18
<input type="checkbox"/>	Ground studies	Idea		Jan 03
<input type="checkbox"/>	Name the Business			Jul 02

Questions?



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Thank You For Attending regoUniversity

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Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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



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