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Demand Management | OOTB Introduction

Your Guide: Ross Hensel

Introductions

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

Agenda

- Introduction
- Incidents
- Ideas

Part I: Introduction

Discuss Rego Base Configuration

Overview of Demand Management

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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

CA PPM 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

- 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

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

Part II: Incidents

<Descriptor>

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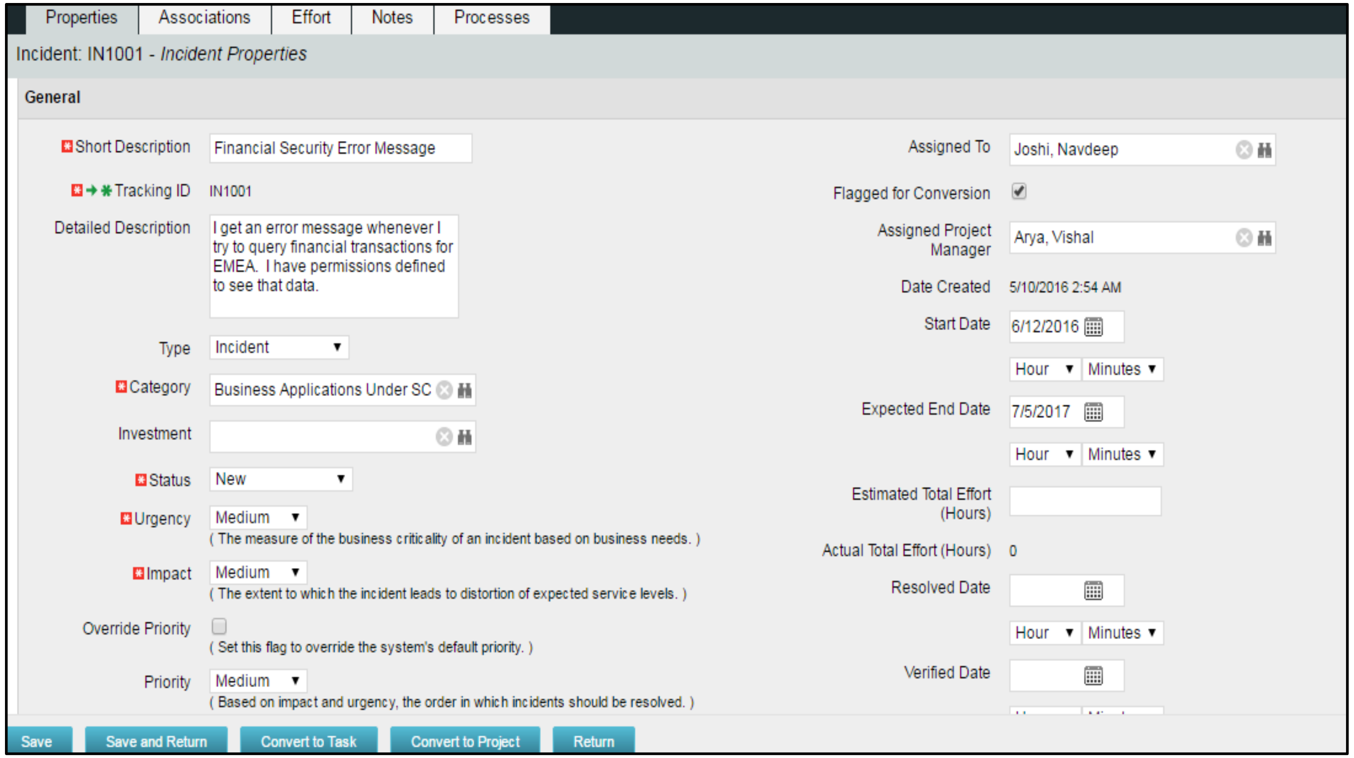
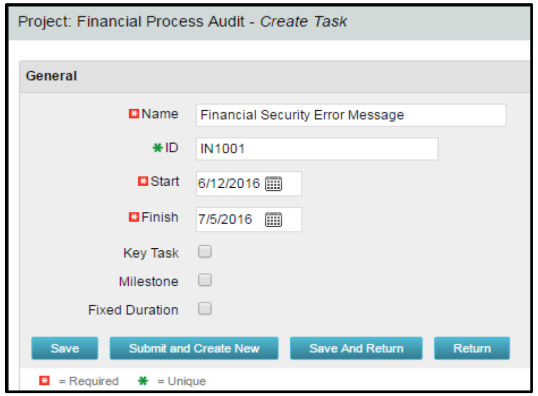
Incident Properties



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

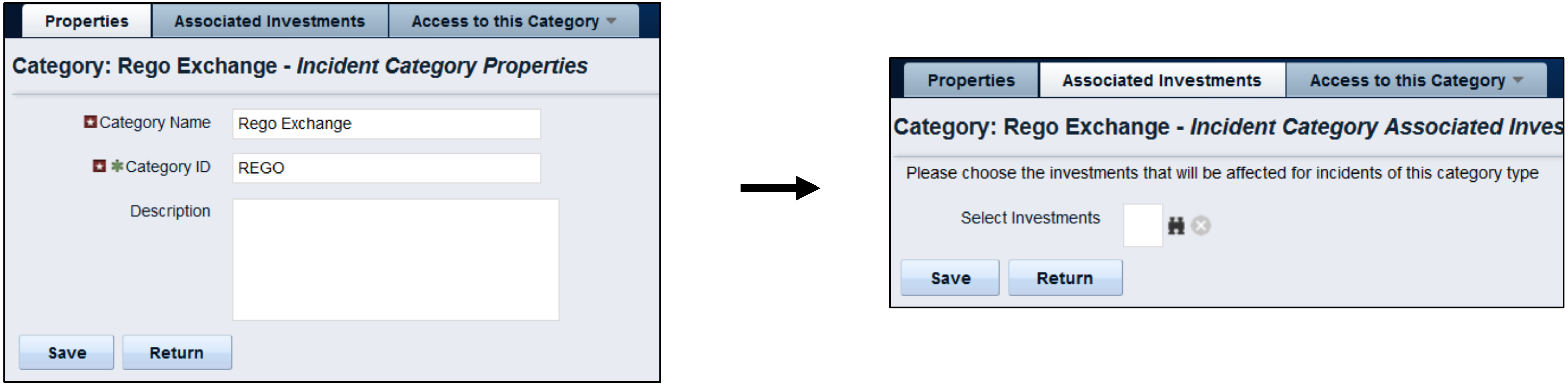


- Incident is converted to a Task on an existing Project
- Details from the incident page are replicated on the Create Task page.

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

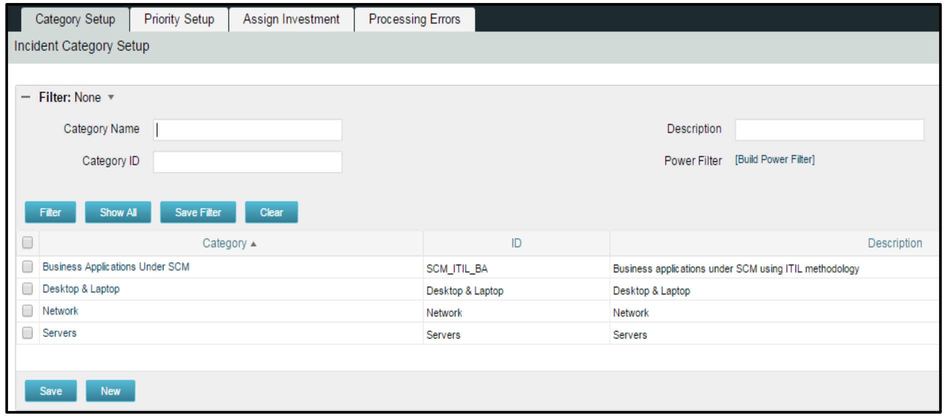
Incident Data Field	Project Data Field	Project Task Field
Short Description	Project Name	Name
Tracking ID	Project ID	ID
Status	Status (Unapproved)	Status (Not Started)
Detailed Description	Description	N/A
Assigned Project Manager	Manager	N/A
Start date	Start Date	Start (date)
Expected End date	Finish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

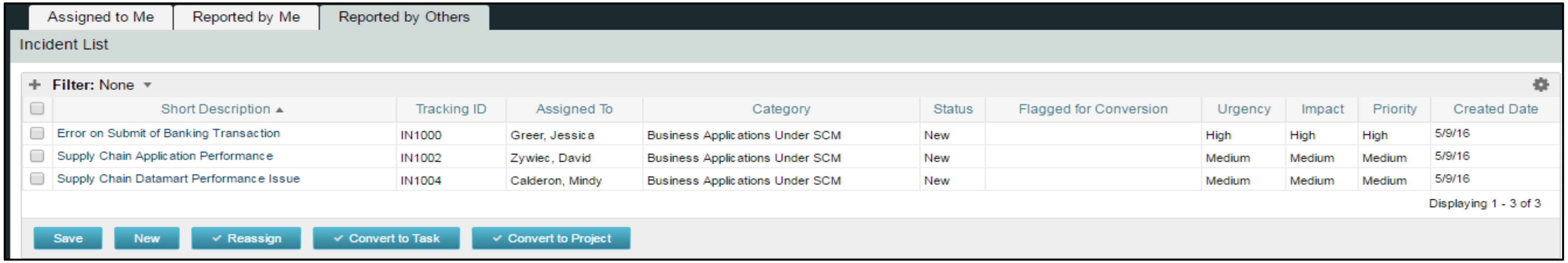
Access Right▲	Description
Incidents - Manage Category Incidents	Allows user to manage incidents mapped to this category. This right includes Incidents - Select Category.
Incidents - Select Category	Allows user to select this category from the incident form.

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

Incident Reporting

OOB reporting on Incidents



Assigned to Me | Reported by Me | Reported by Others

Incident List

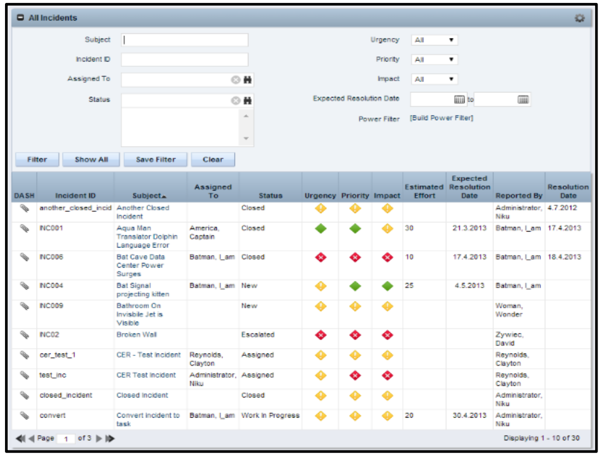
Filter: None

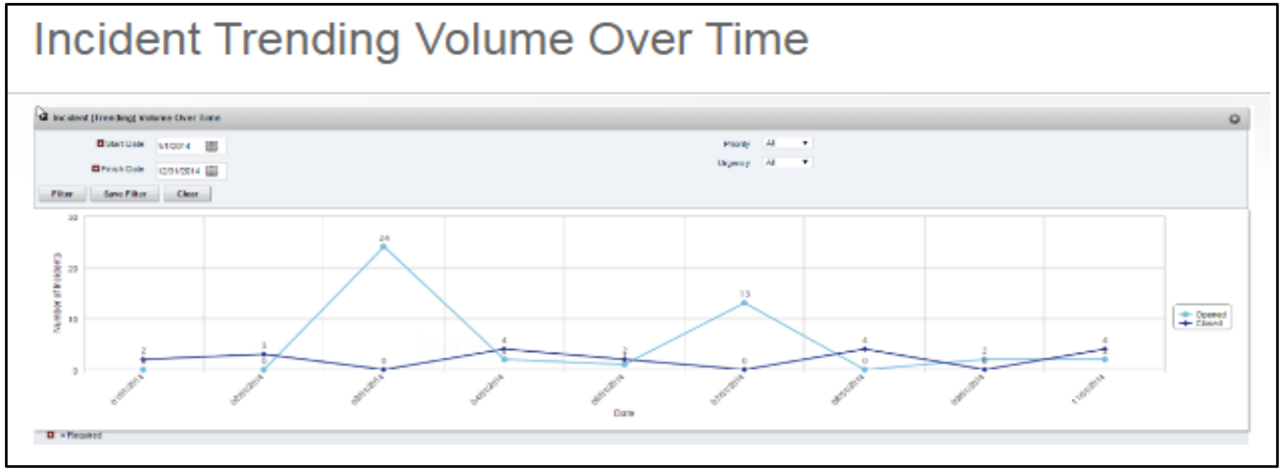
	Short Description ▲	Tracking ID	Assigned To	Category	Status	Flagged for Conversion	Urgency	Impact	Priority	Created Date
☐	Error on Submit of Banking Transaction	IN1000	Greer, Jessica	Business Applications Under SCM	New		High	High	High	5/9/16
☐	Supply Chain Application Performance	IN1002	Zywiec, David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

Displaying 1 - 3 of 3

Save | New | Reassign | Convert to Task | Convert to Project

RegoXchange reporting on Incidents





Part III: Ideas

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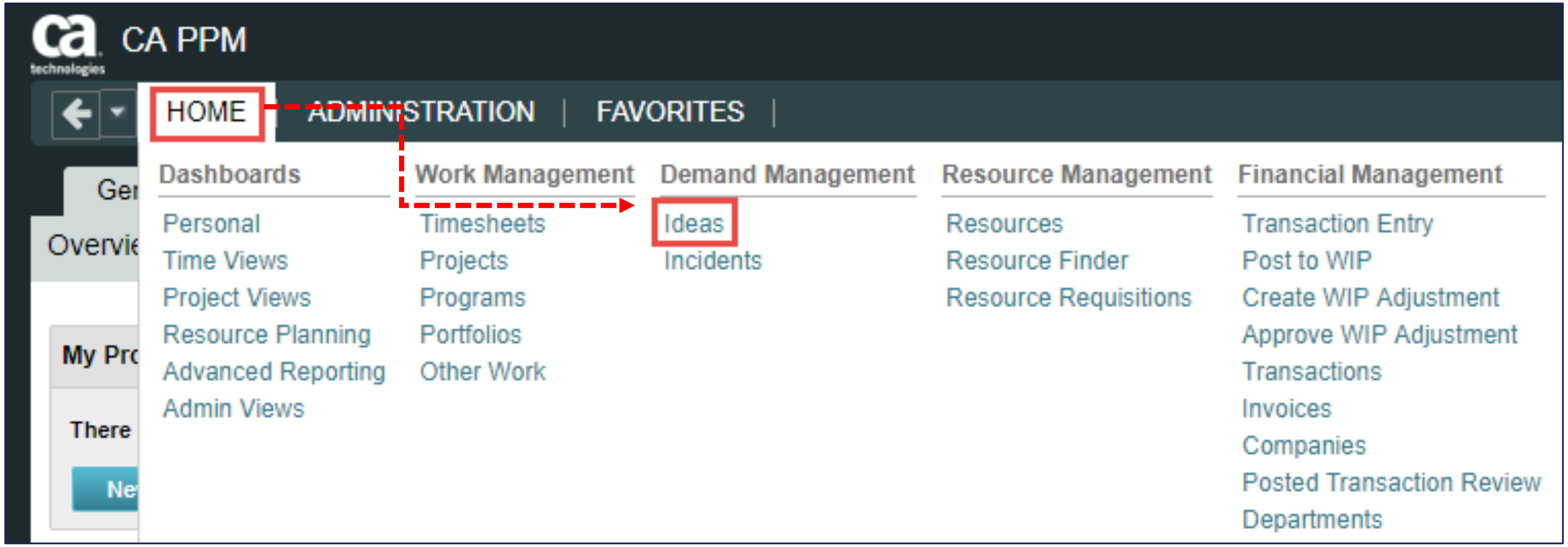
Let Rego be your guide.

Accessing Ideas

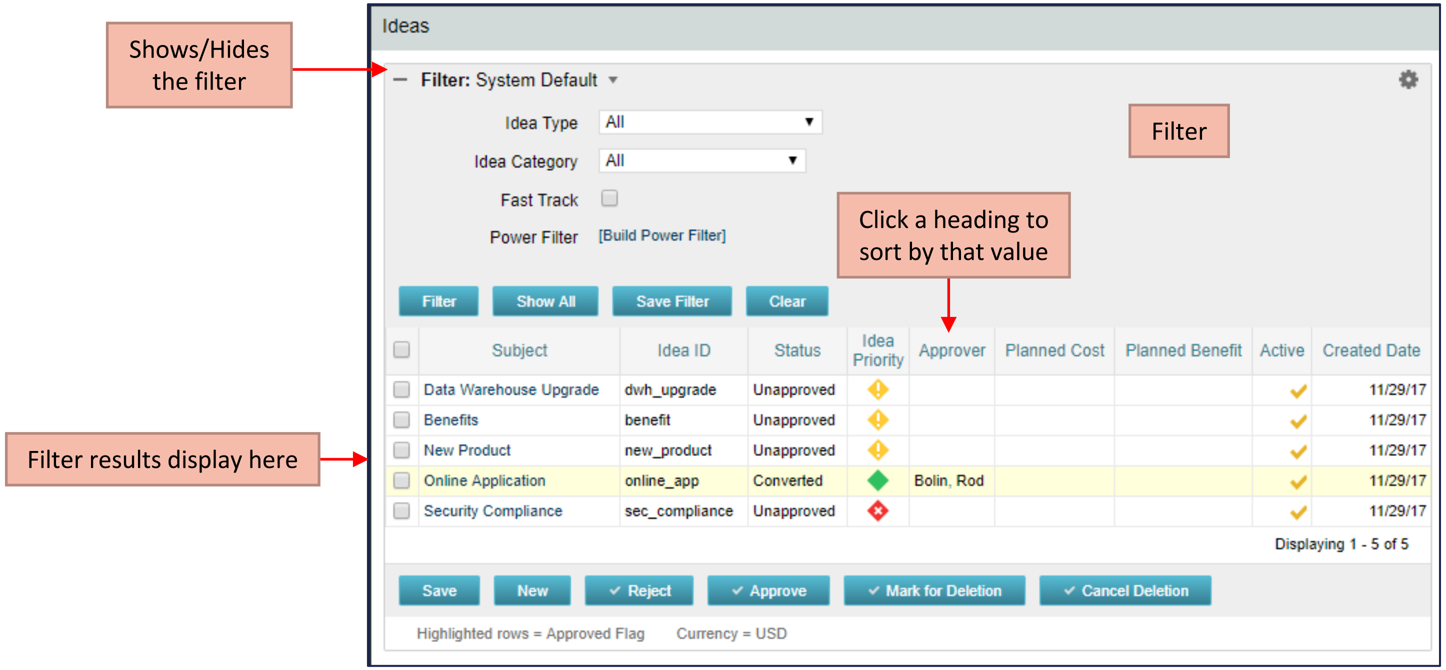
- To access ideas, hover over Home, then click Ideas under Demand Management
  - Note that navigation bar links and section headers may be different depending on how your CA PPM administrator has configured the interface
  - Also be aware that access depends on having the correct security rights (PMs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



Idea List View

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

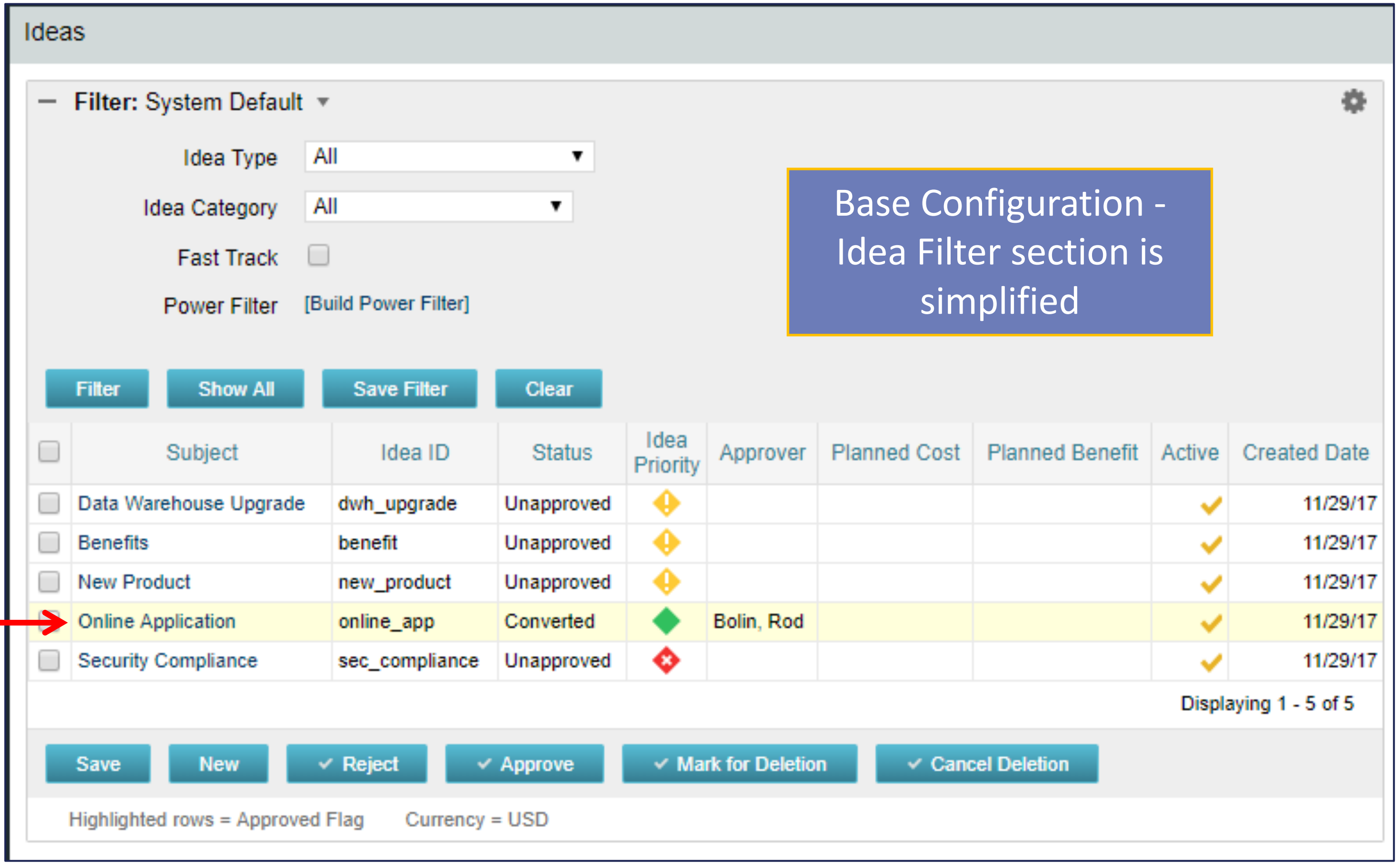
- Click the **+** sign to Expand the Filter if it is collapsed by default
  - The top portion of the screen is a filter allowing you to search CA PPM for items meeting specific criteria
  - The bottom portion of the screen is the list that displays the results of your filter criteria



Base Configuration – Idea Security Groups

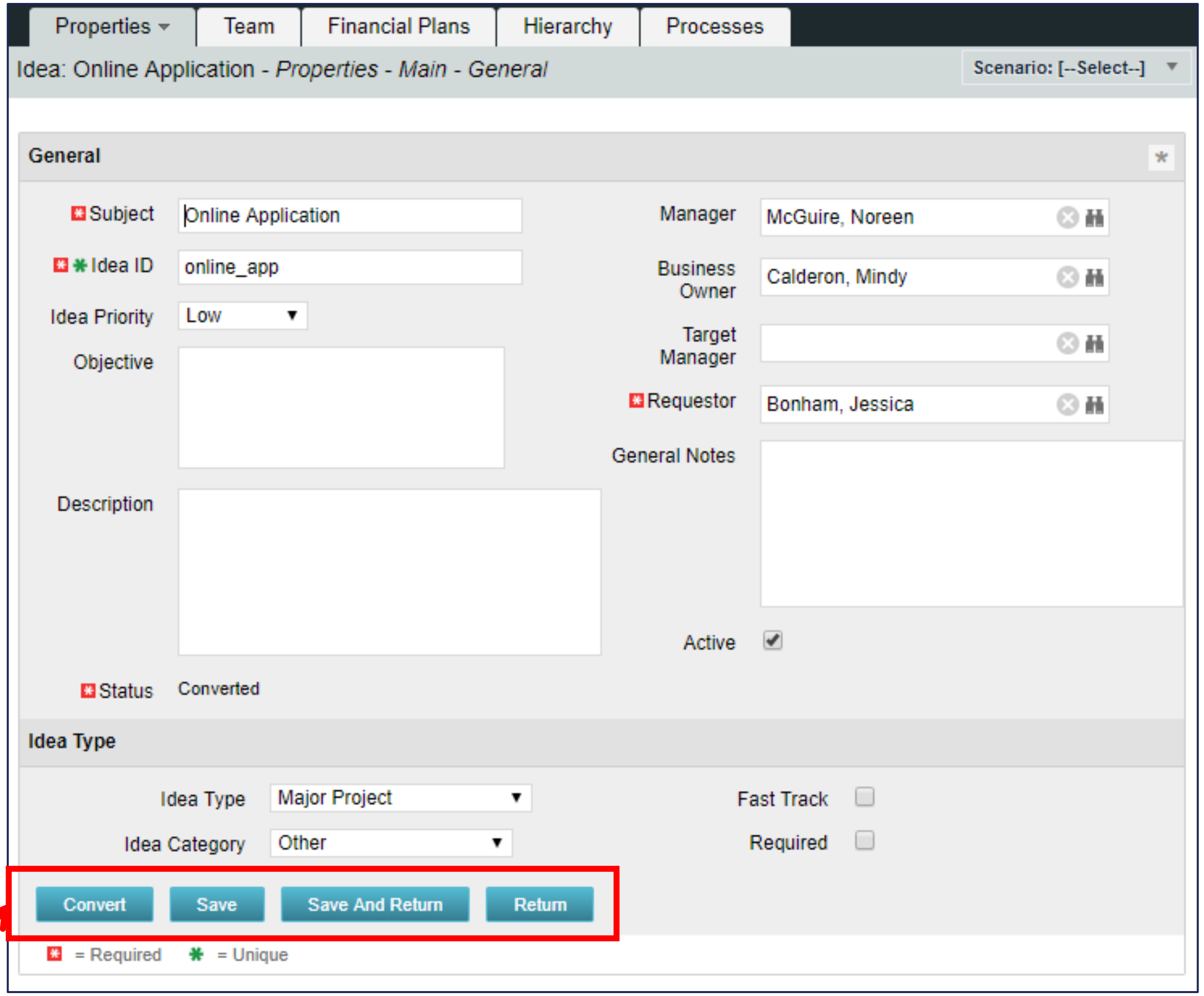
Accessing Ideas

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



Idea Security

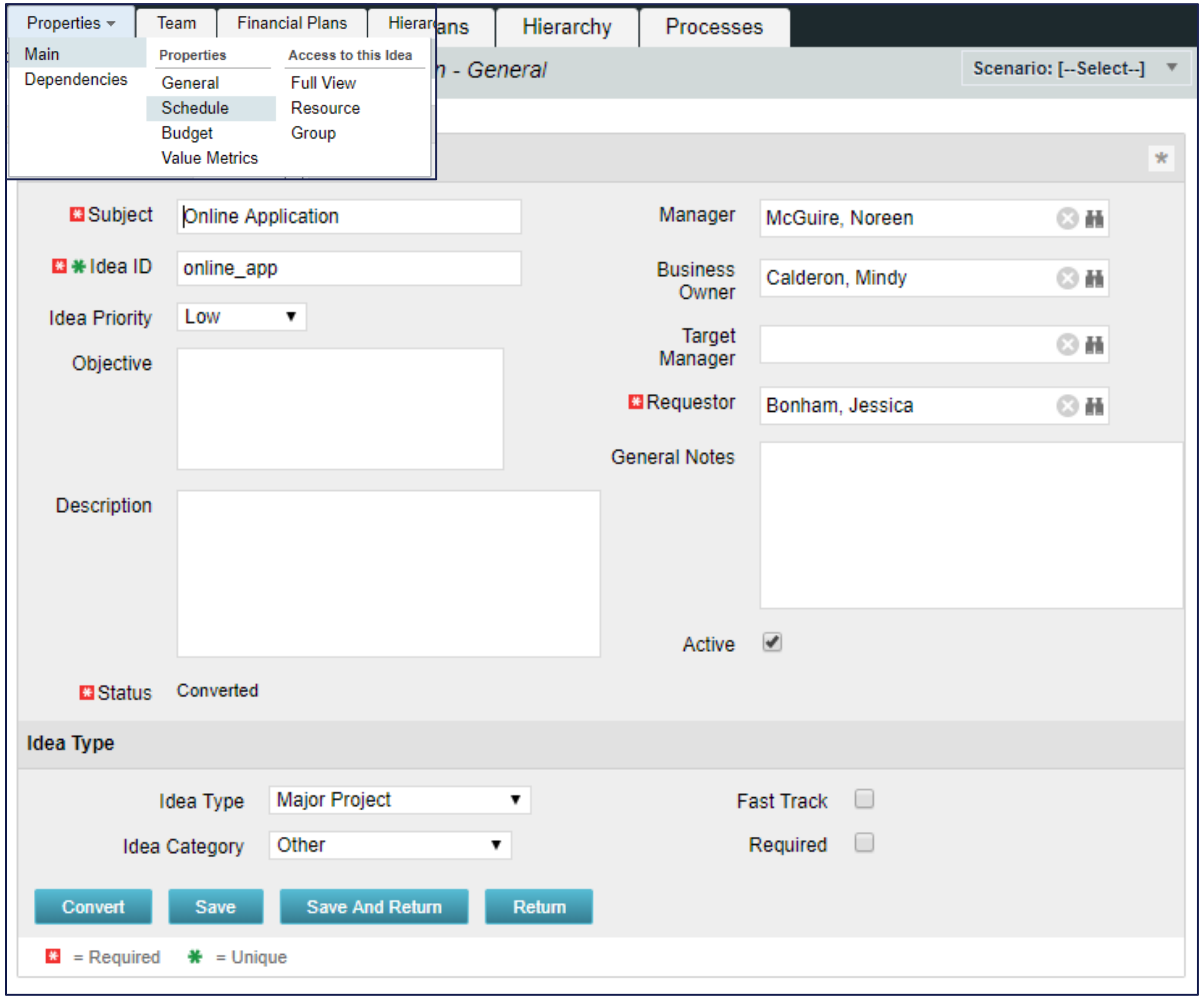
- Access to the idea is controlled via CA PPM Security Groups:
  - You may have read/write access or read only access to all ideas
  - You may have read/write access to only the ideas you created
  - You may have approval and/or conversion rights
- Security Groups in Base Configuration:
  - Idea Creator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



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

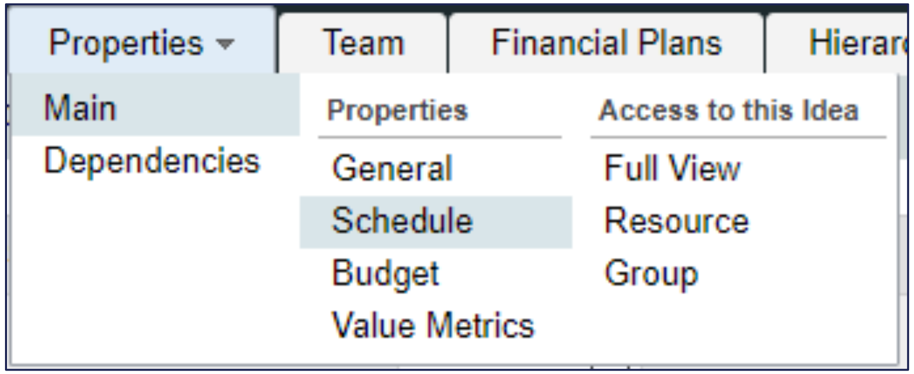
Idea Properties

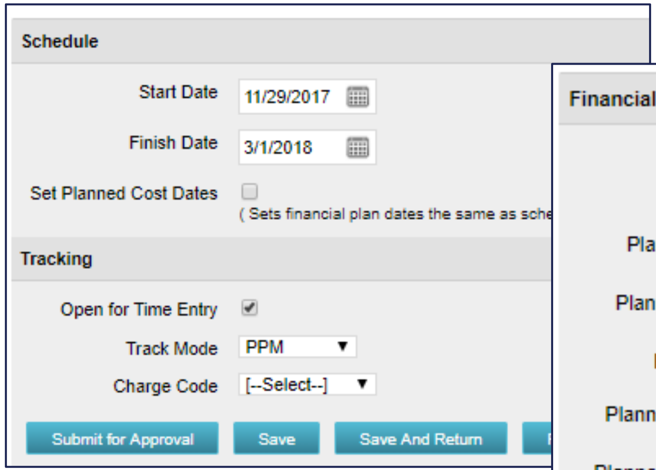
- Base Configuration
  - New Idea type section
  - Attributes renamed, hidden or moved to other subpages
  - Fields resized
  - Defaults set
  - Properties tab dropdown updated with more concise options

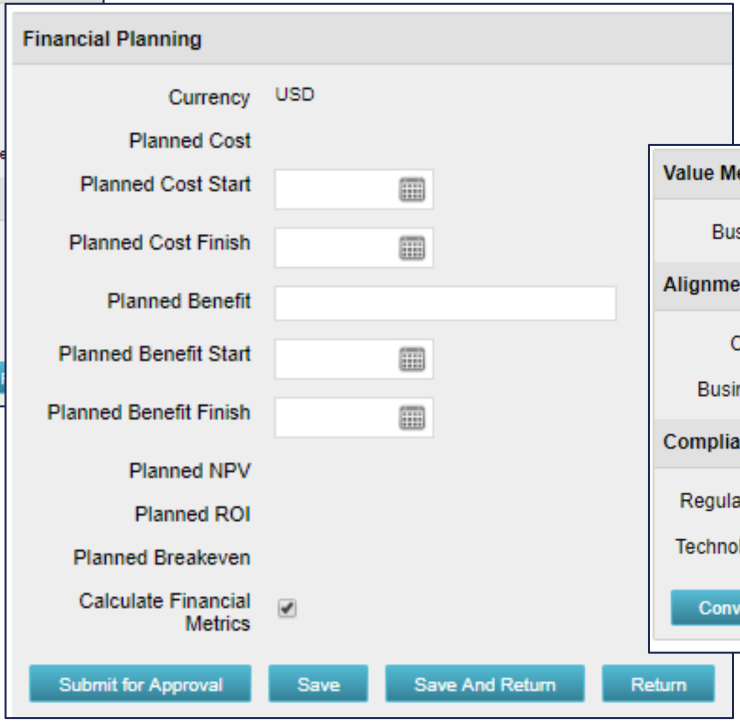


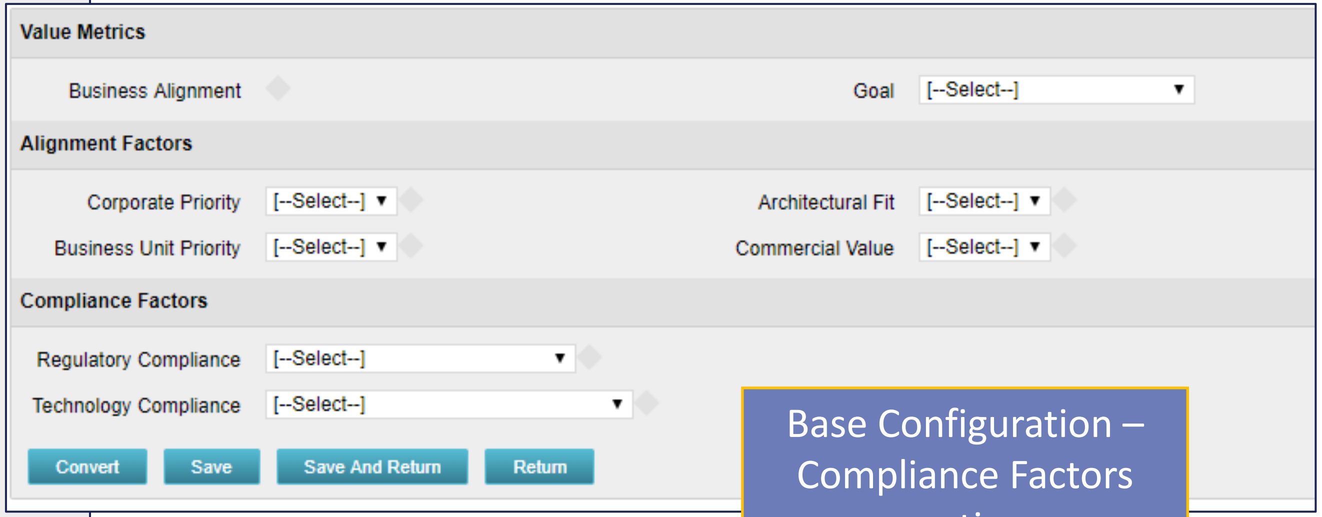
Idea Properties

- Schedule subpage
- Budget/Financial subpage
- Value Metrics subpage





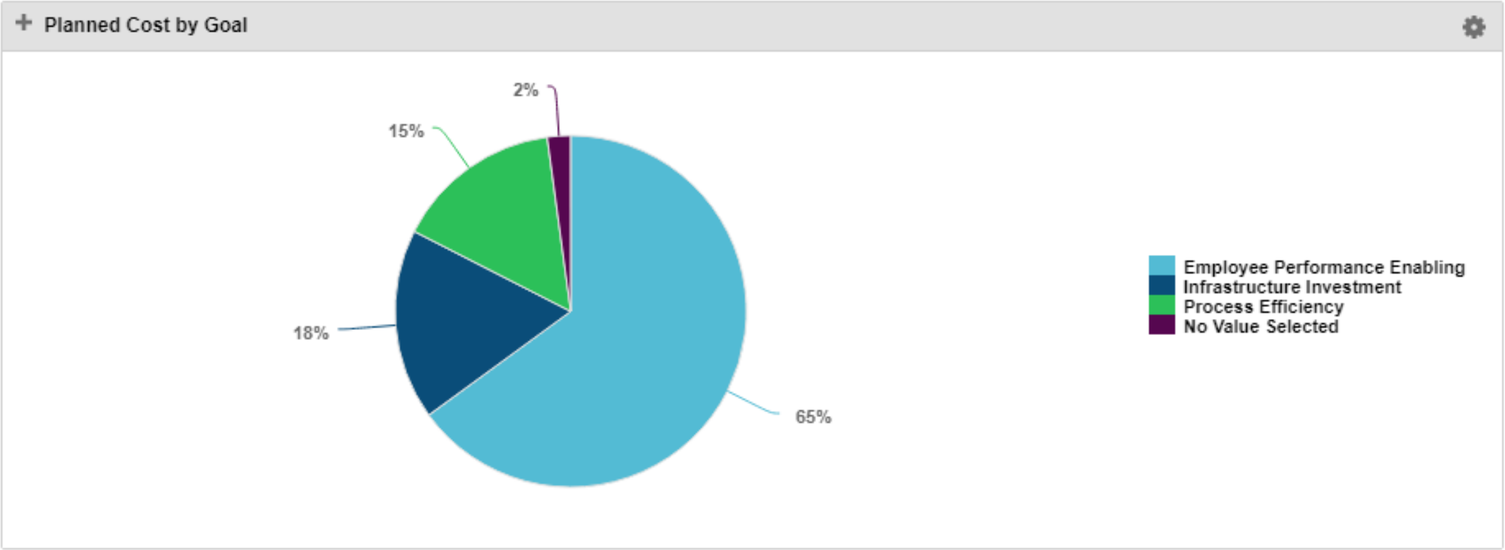


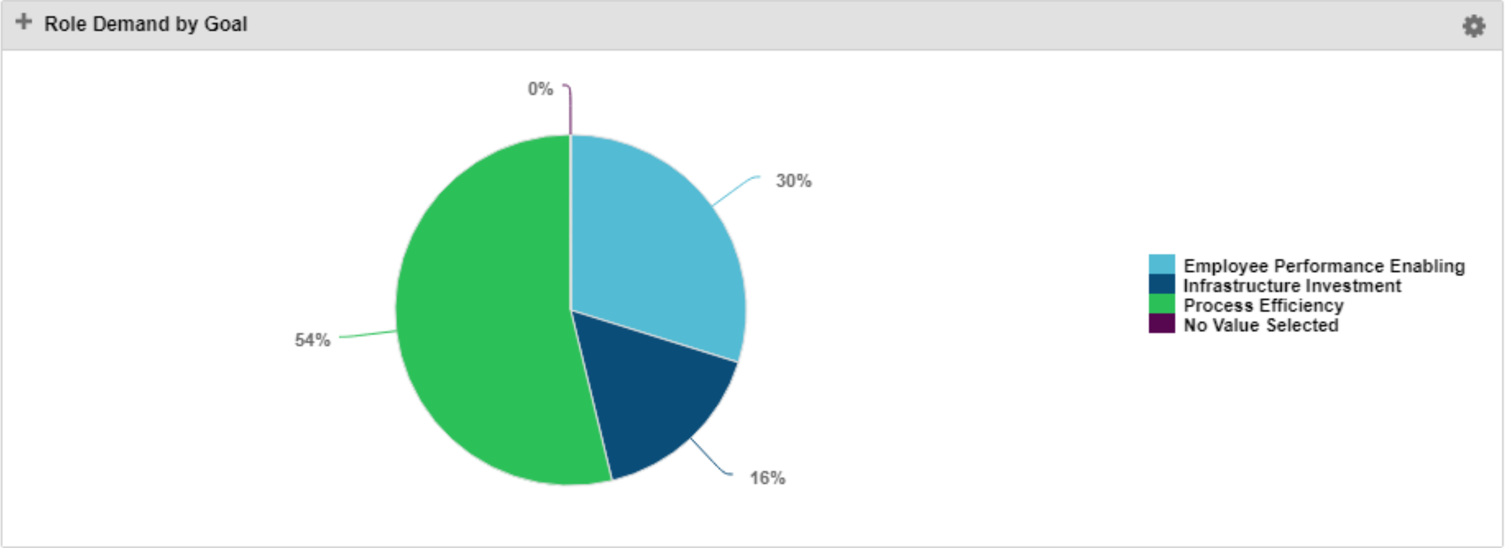


Base Configuration – Compliance Factors section

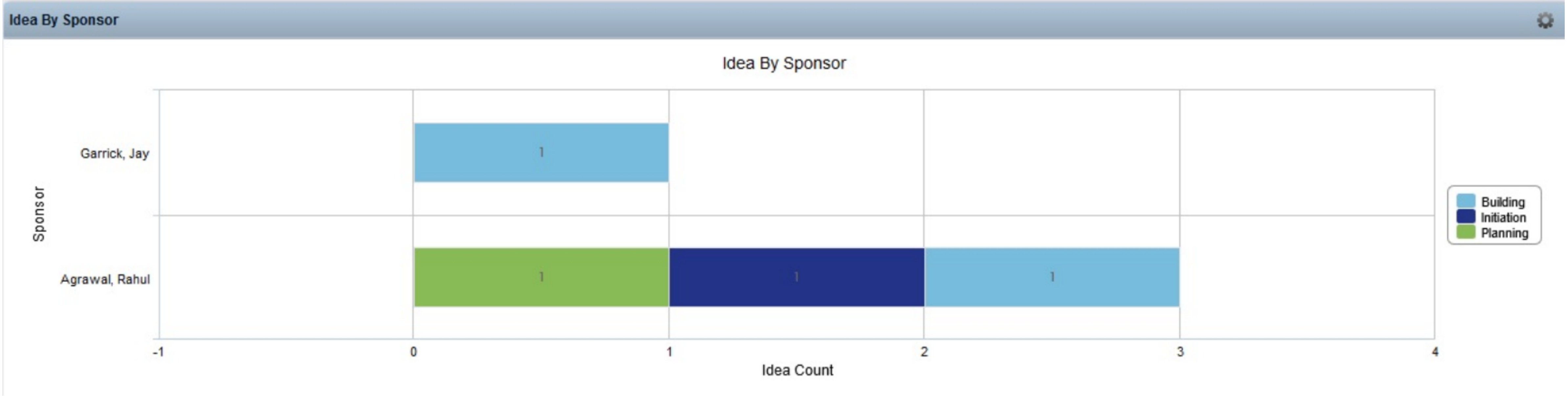
OOTB Idea Reporting

- 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.

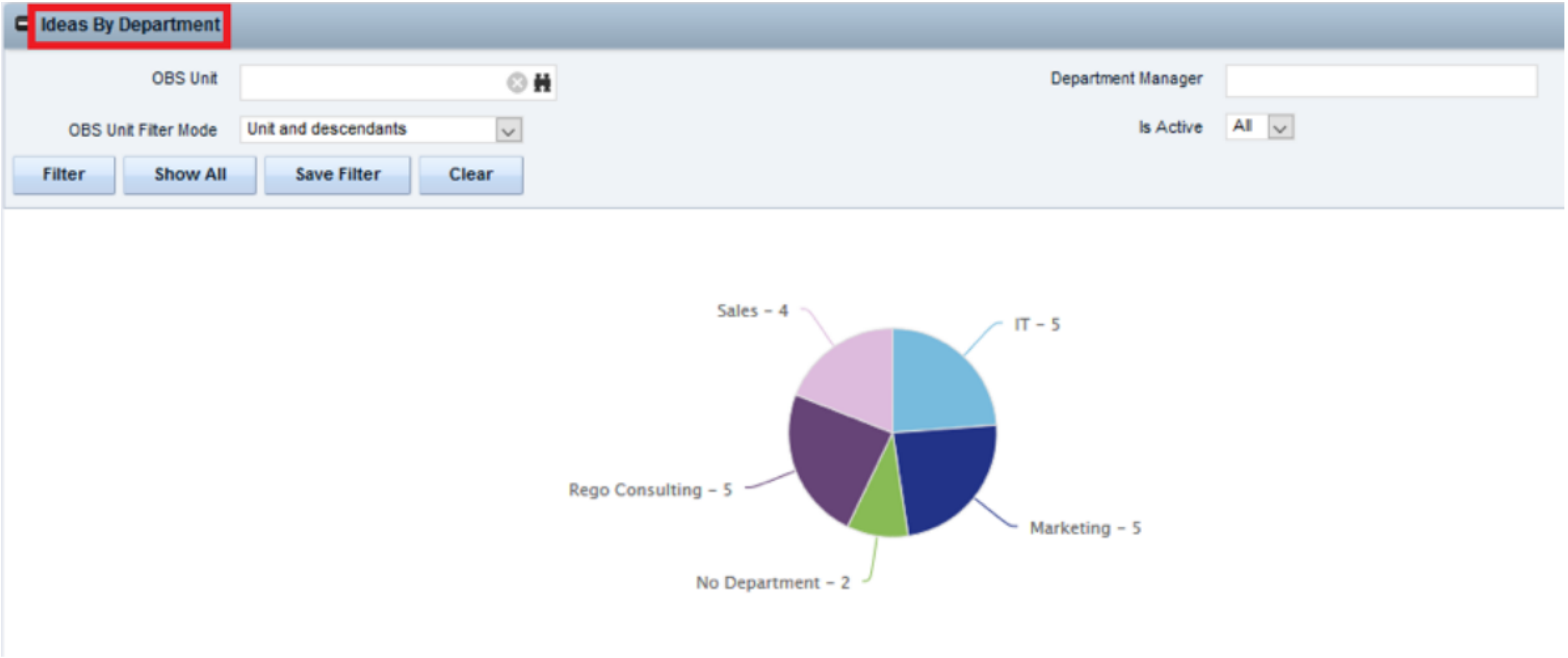




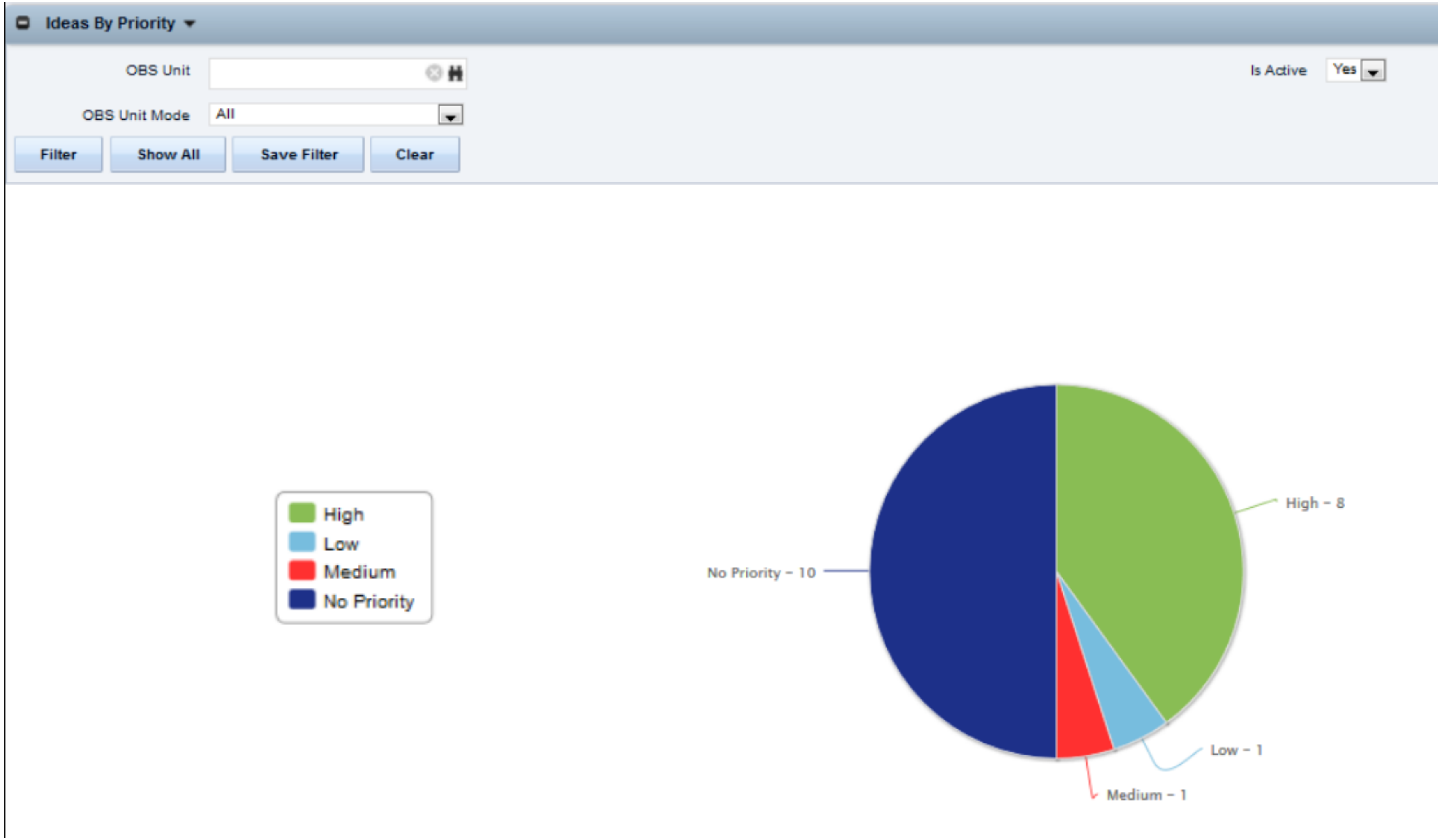
RegoXchange – Sponsor by Stage



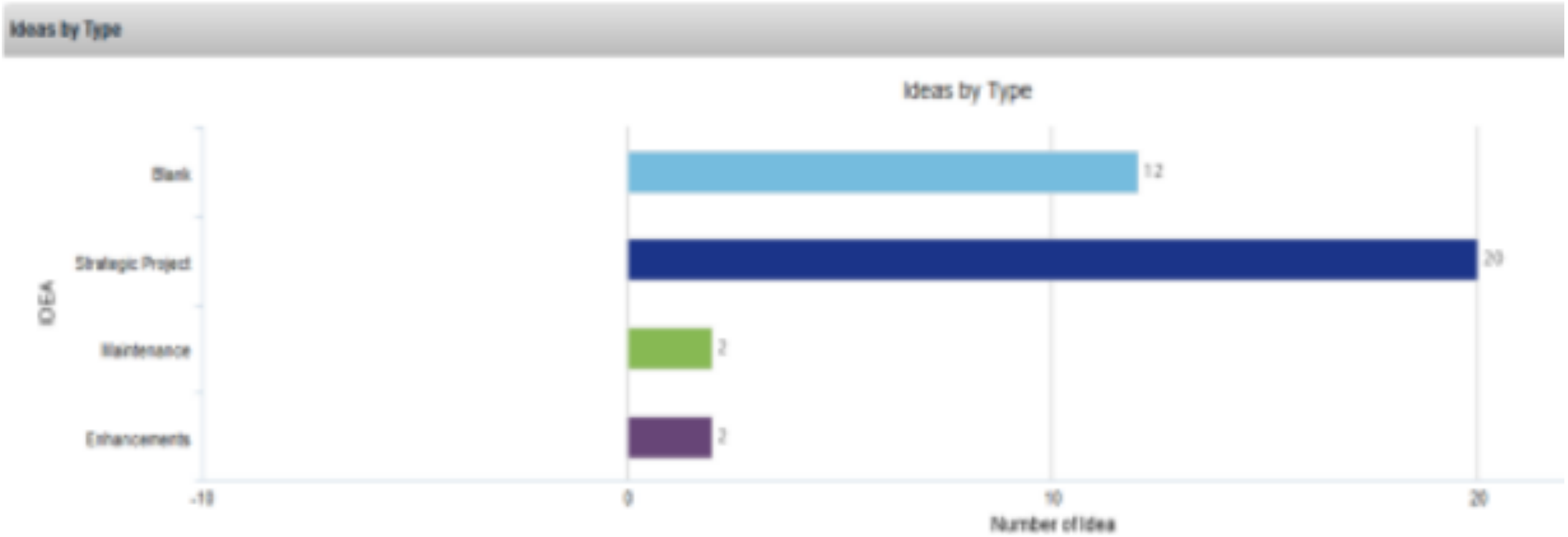
RegoXchange – Ideas by Department



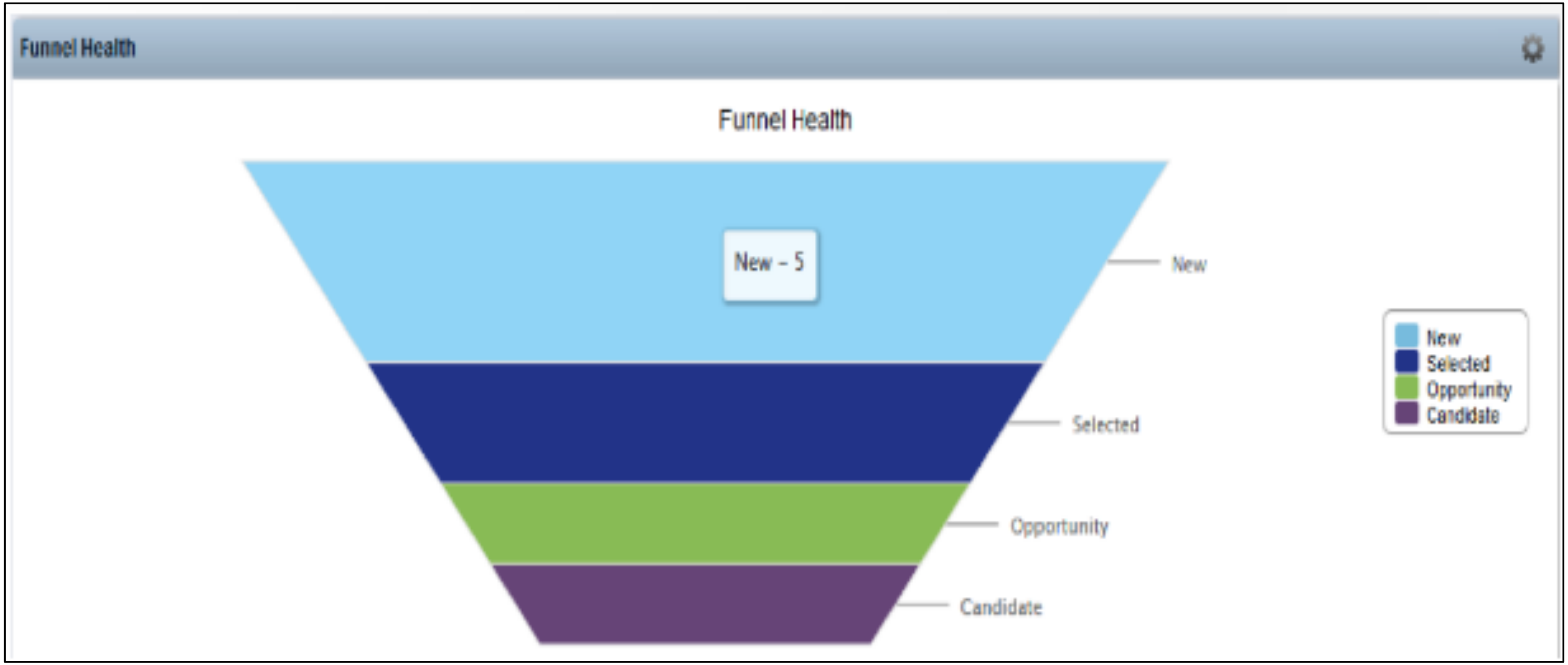
RegoXchange – Ideas by Priority



RegoXchange – Ideas by Type



RegoXchange Views



Questions?

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- Click on **Certifications**
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- 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**

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  - Body copy (24 pt)
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- If you have questions about color schemes, fonts, or the template please contact Steve Winchester