

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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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



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

Properties Associations Effort Notes Processes

Incident: IN1001 - Incident Properties

General

Short Description Financial Security Error Message

Tracking ID IN1001

Detailed Description I get an error message whenever I try to query financial transactions for EMEA. I have permissions defined to see that data.

Type Incident

Category Business Applications Under SC

Investment

Status New

Urgency Medium
(The measure of the business criticality of an incident based on business needs.)

Impact Medium
(The extent to which the incident leads to distortion of expected service levels.)

Override Priority
(Set this flag to override the system's default priority.)

Priority Medium
(Based on impact and urgency, the order in which incidents should be resolved.)

Assigned To Joshi, Navdeep

Flagged for Conversion

Assigned Project Manager Arya, Vishal

Date Created 5/10/2016 2:54 AM

Start Date 6/12/2016
Hour Minutes

Expected End Date 7/5/2017
Hour Minutes

Estimated Total Effort (Hours)

Actual Total Effort (Hours) 0

Resolved Date
Hour Minutes

Verified Date

Save Save and Return Convert to Task Convert to Project Return

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

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Properties Associated Investments Access to this Category ▾

Category: Rego Exchange - Incident Category Properties

Category Name Rego Exchange

Category ID REGO

Description


Save Return



Properties Associated Investments Access to this Category ▾

Category: Rego Exchange - Incident Category Associated Investments

Please choose the investments that will be affected for incidents of this category type

Select Investments  

Save Return

Security Overview

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

Incident Category Setup

Filter: None ▼

Category Name Description

Category ID Power Filter [\[Build Power Filter\]](#)

[Filter](#) [Show All](#) [Save Filter](#) [Clear](#)

<input type="checkbox"/>	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 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										
<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
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Reassign"/> <input type="button" value="Convert to Task"/> <input type="button" value="Convert to Project"/>										

RegoXchange reporting on Incidents

All Incidents

Subject

Incident ID

Assigned To

Status

Urgency

Priority

Impact

Expected Resolution Date

Power Filter

Build Power Filter

Filter

Show All

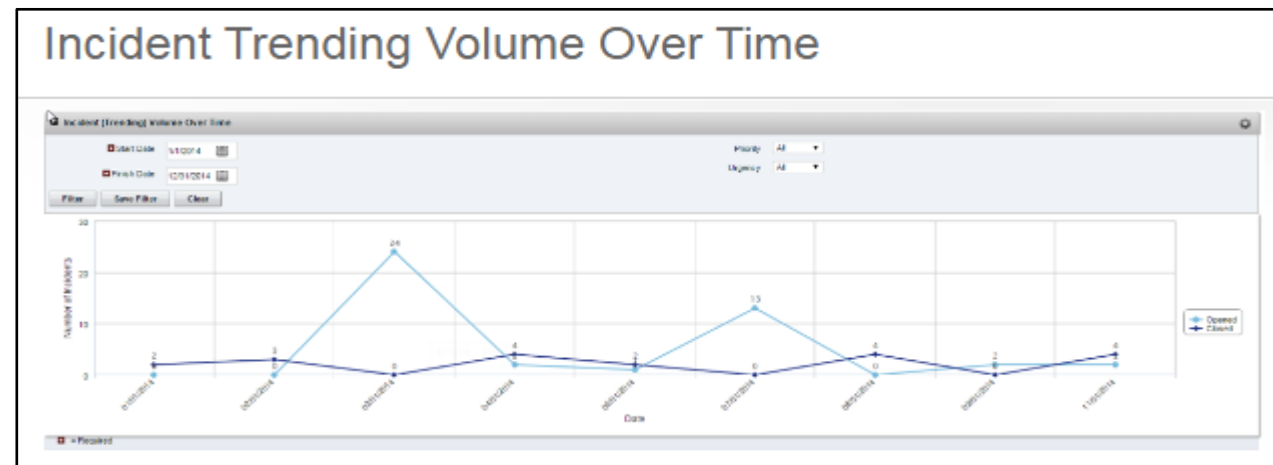
Save Filter

Clear

DASH	Incident ID	Subject	Assigned To	Status	Urgency	Priority	Impact	Estimated Effort	Expected Resolution Date	Reported By	Resolution Date
	another_closed_incident	Another Closed Incident	America	Closed				30	21.3.2013	Administrator, Nika	4.7.2012
	INC001	Aqua Man Transistor Dolphin Language Error	Batman, Lam	Closed				10	17.4.2013	Batman, Lam	18.4.2013
	INC006	Bat Cave Data Center Power Surge	Batman, Lam	New				25	4.5.2013	Batman, Lam	
	INC004	Bat Signal propelling kiten	Women, Wonder								
	INC009	Batman On Invaluable Jet is Visible	Zywiec, David	Escalated							
	INC02	Broken Wall	Reynolds, Clayton	Assigned							
	car_test_1	CER - Test Incident	Administrator, Nika	Closed							
	test_inc	CER Test Incident	Batman, Lam	Work in Progress				20	30.4.2013	Administrator, Nika	
	closed_incident	Closed Incident									
	convert	Convert Incident to Task									

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Displaying 1 - 10 of 8



Part III: Ideas

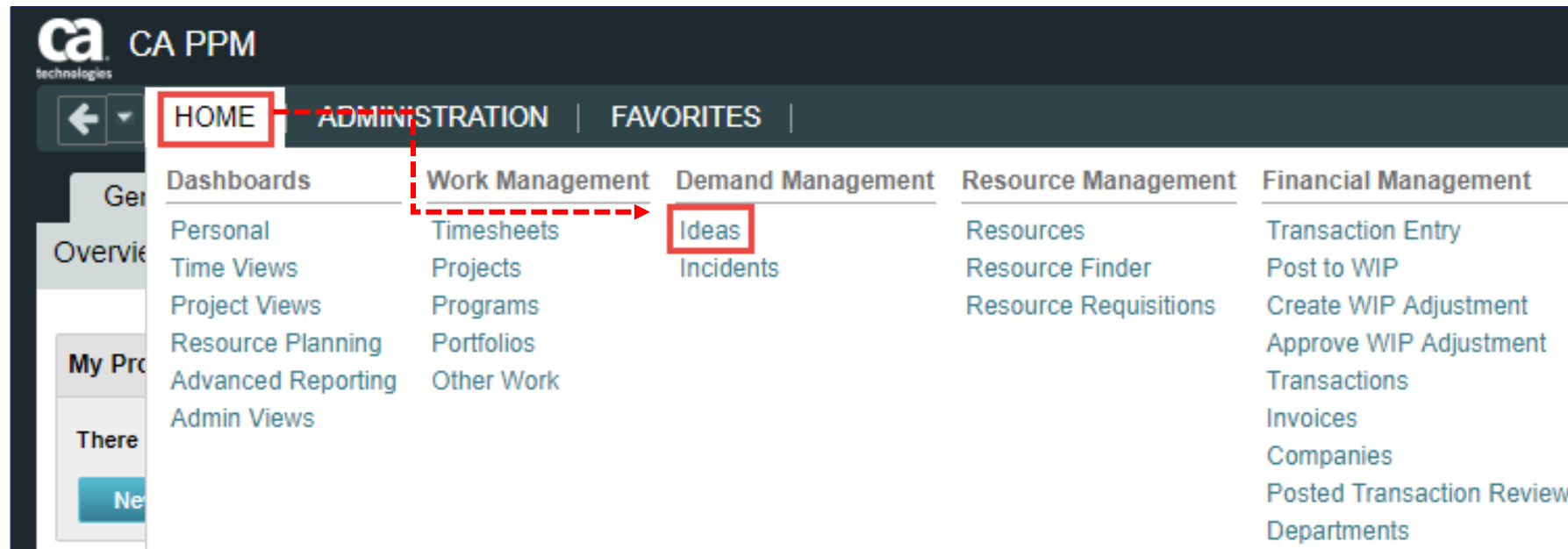
<Descriptor>

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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

The screenshot shows the 'Ideas' interface. At the top, there's a 'Filter' section with dropdowns for 'Idea Type' and 'Idea Category', both set to 'All'. Below these are checkboxes for 'Fast Track' and 'Power Filter' (with a link to 'Build Power Filter'). Buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear' are present. A table below displays a list of ideas with columns: Subject, Idea ID, Status, Idea Priority, Approver, Planned Cost, Planned Benefit, Active, and Created Date. The table contains five rows of data. The 'Online Application' row is highlighted in yellow. At the bottom, there are buttons for 'Save', 'New', 'Reject', 'Approve', 'Mark for Deletion', and 'Cancel Deletion'. A status bar at the very bottom indicates 'Highlighted rows = Approved Flag' and 'Currency = USD'.

Annotations in the image:

- A red arrow points from the text 'Shows/Hides the filter' to the 'Filter' button.
- A red arrow points from the text 'Filter results display here' to the table.
- A red arrow points from the text 'Click a heading to sort by that value' to the 'Idea Priority' column header.
- A red box labeled 'Filter' is placed over the filter section.

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

Ideas

Filter: System Default

Idea Type: All

Idea Category: All

Fast Track: ☐

Power Filter: [Build Power Filter]

Base Configuration - Idea Filter section is simplified

Filter Show All Save Filter Clear

	Subject	Idea ID	Status	Idea Priority	Approver	Planned Cost	Planned Benefit	Active	Created Date
<input type="checkbox"/>	Data Warehouse Upgrade	dwh_upgrade	Unapproved	!				✓	11/29/17
<input type="checkbox"/>	Benefits	benefit	Unapproved	!				✓	11/29/17
<input type="checkbox"/>	New Product	new_product	Unapproved	!				✓	11/29/17
<input checked="" type="checkbox"/>	Online Application	online_app	Converted	◆	Bolin, Rod			✓	11/29/17
<input type="checkbox"/>	Security Compliance	sec_compliance	Unapproved	✖				✓	11/29/17

Displaying 1 - 5 of 5

Save New ✓ Reject ✓ Approve ✓ Mark for Deletion ✓ Cancel Deletion

Highlighted rows = Approved Flag Currency = USD

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 screenshot shows the 'Idea: Online Application - Properties - Main - General' form. The 'General' section includes fields for Subject, Idea ID, Idea Priority, Objective, Description, Manager, Business Owner, Target Manager, Requestor, General Notes, Status, and Active. The 'Idea Type' section includes fields for Idea Type and Idea Category. At the bottom, there are four buttons: Convert, Save, Save And Return, and Return. A red box highlights these buttons, and a red arrow points to them from the text below.



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

The screenshot shows the 'Idea Properties' form in the Rego University 2018 application. The form is titled 'Idea - General' and has a dropdown menu for 'Scenario: [--Select--]'. The 'Properties' tab is selected, showing a list of sub-tabs: Main, Dependencies, Properties, General, Schedule, Budget, Value Metrics, Access to this Idea, Full View, Resource, and Group. The form fields are organized into two columns. The left column contains: Subject (Online Application), Idea ID (online_app), Idea Priority (Low), Objective, Description, and Status (Converted). The right column contains: Manager (McGuire, Noreen), Business Owner (Calderon, Mindy), Target Manager, Requestor (Bonham, Jessica), General Notes, and Active (checked). Below these fields is the 'Idea Type' section, which includes Idea Type (Major Project), Idea Category (Other), Fast Track (unchecked), and Required (unchecked). At the bottom, there are four buttons: Convert, Save, Save And Return, and Return. A legend at the bottom left indicates that a red asterisk (*) means Required and a green asterisk (*) means Unique.

Idea Properties

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

Properties ▾	Team	Financial Plans	Hierarchy
Main	Properties	Access to this Idea	
Dependencies	General	Full View	
	Schedule	Resource	
	Budget	Group	
	Value Metrics		

Schedule

Start Date: 11/29/2017

Finish Date: 3/1/2018

Set Planned Cost Dates: ☐ (Sets financial plan dates the same as schedule)

Tracking

Open for Time Entry: ☒

Track Mode: PPM

Charge Code: [--Select--]

Submit for Approval Save Save And Return

Financial Planning

Currency: USD

Planned Cost

Planned Cost Start:

Planned Cost Finish:

Planned Benefit

Planned Benefit Start:

Planned Benefit Finish:

Planned NPV

Planned ROI

Planned Breakeven

Calculate Financial Metrics: ☒

Submit for Approval Save Save And Return Return

Value Metrics

Business Alignment: Goal: [--Select--]

Alignment Factors

Corporate Priority: [--Select--] Architectural Fit: [--Select--]

Business Unit Priority: [--Select--] Commercial Value: [--Select--]

Compliance Factors

Regulatory Compliance: [--Select--]

Technology Compliance: [--Select--]

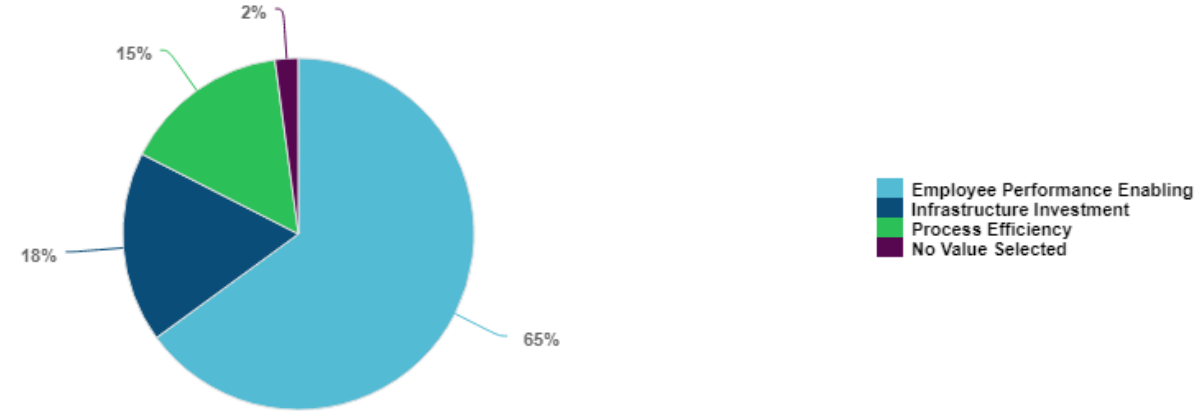
Convert Save Save And Return Return

Base Configuration –
Compliance Factors
section

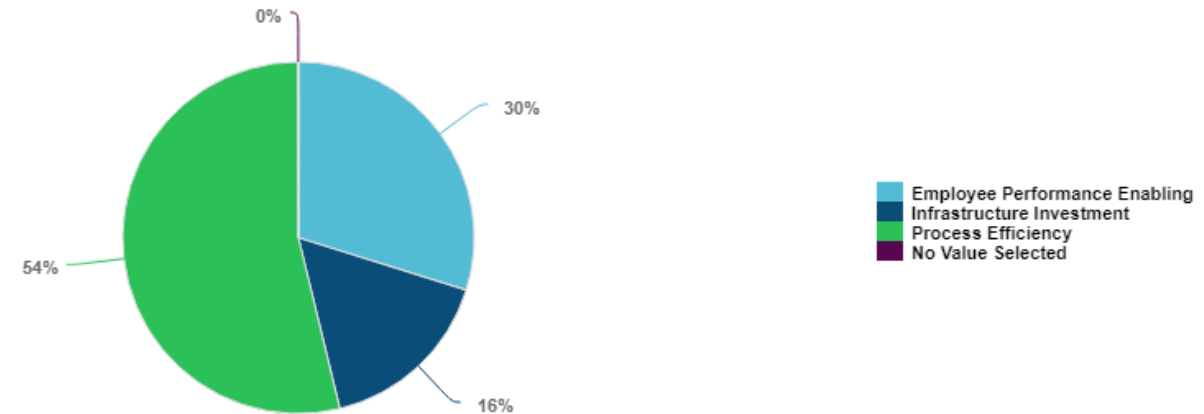
OOTB Idea Reporting

- 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.

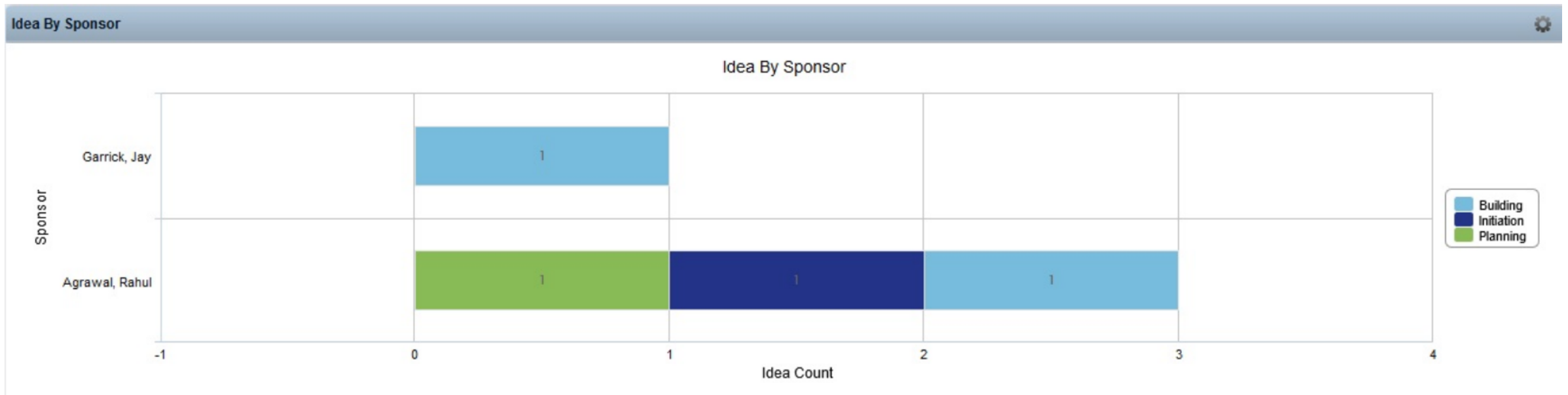
+ Planned Cost by Goal



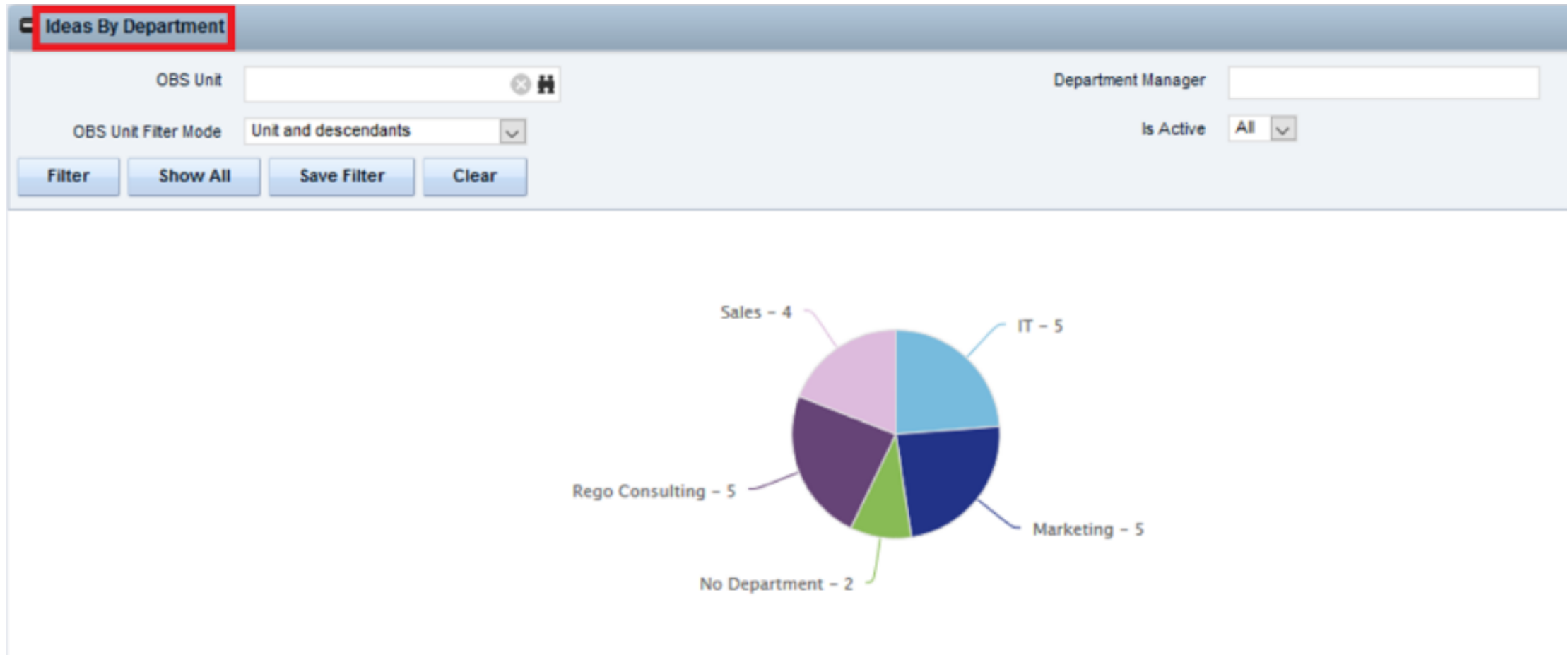
+ Role Demand by Goal



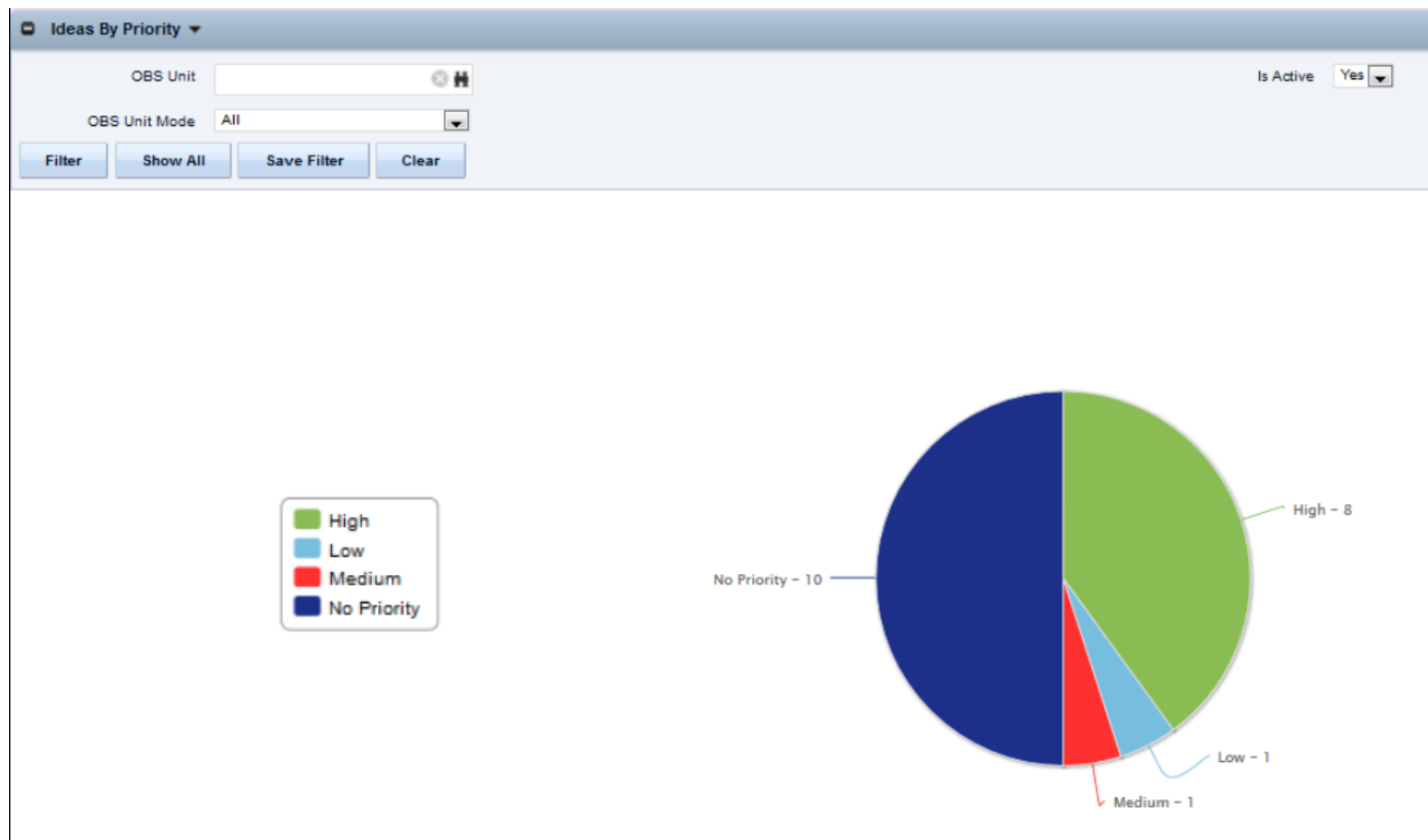
RegoXchange – Sponsor by Stage



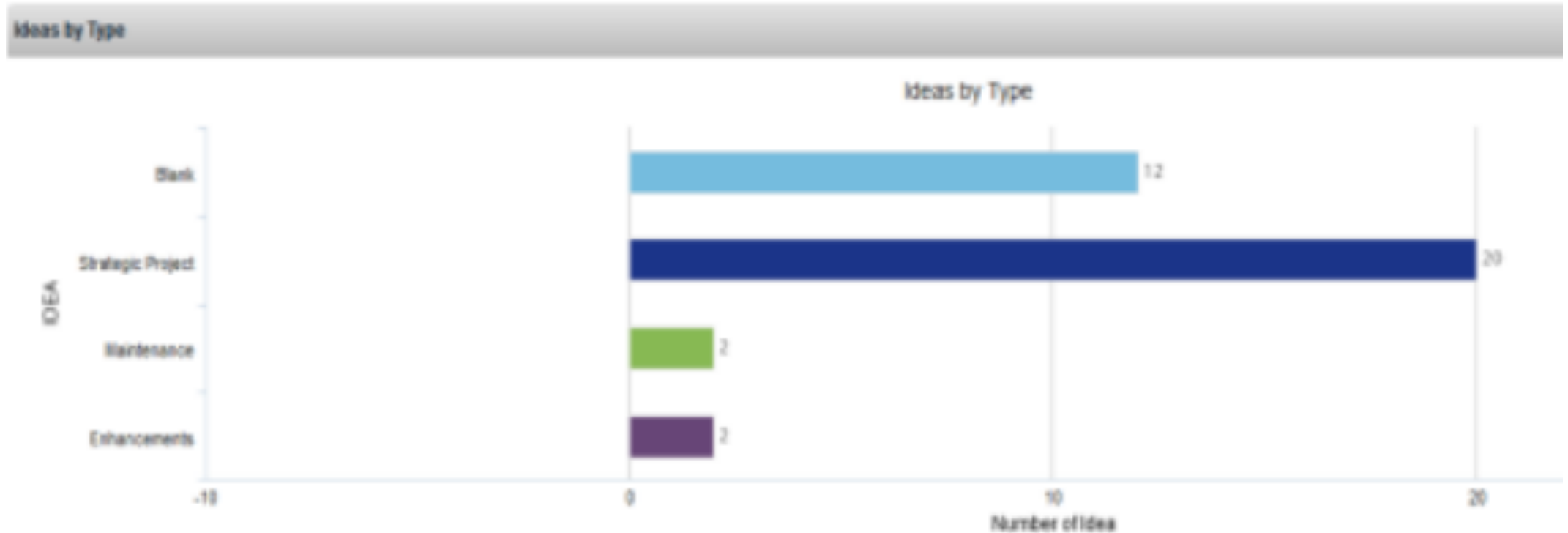
RegoXchange – Ideas by Department



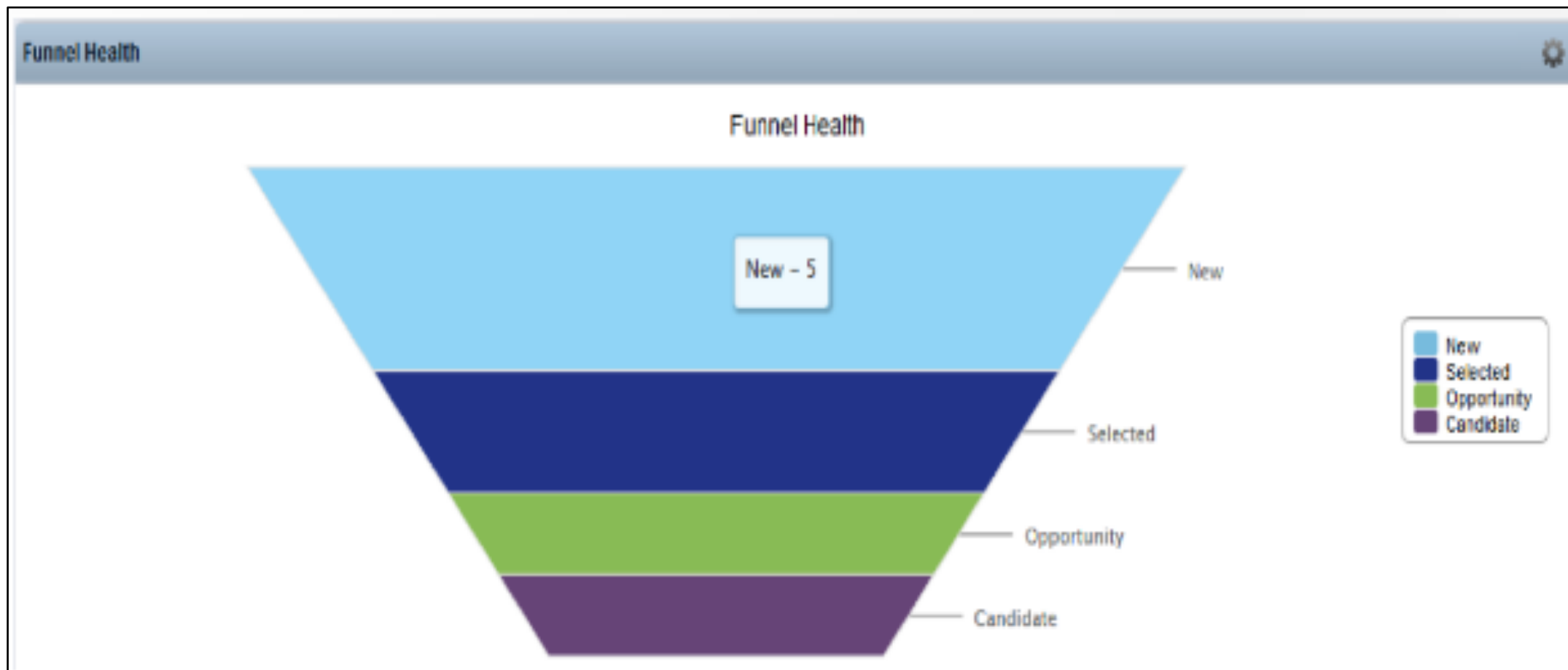
RegoXchange – Ideas by Priority



RegoXchange – Ideas by Type



RegoXchange Views



Questions?



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Thank You For Attending regoUniversity

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.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com

Initial Cap For Each Word In Headline

- Body copy (26 pt)
 - Body copy (24 pt)
 - Body copy (20 pt)
- Font should be no larger than 26 pt
- If you have questions about color schemes, fonts, or the template please contact Steve Winchester