CA Clarity™ PPM

Demand Management User Guide
v13.0.00

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Chapter 1: Demand Management Overview

Demand Management provides a means to capture, classify, evaluate, and dispose of all sources of demand. Demand on an IT organization can take many forms. Demand can be a project request, service request, incident, idea for a new product or service, strategic initiative, or support request.

Use Demand Management to capture demand in one of two ways. You can use CA Clarity PPM forms to capture information about an idea, project request, or incident. You can also integrate CA Clarity PPM data with other systems that capture help desk tickets, incidents, and service requests. These integrations are supported through the XML Open Gateway (XOG).

See the *XML Open Gateway Developer Guide* for more information.

This section contains the following topics:

Demand Management Terms

The following terms are used in the context of Demand Management:

External ID

The identification number of an incident inherited from an external system, such as Remedy.

Flag for Conversion

The state of an incident once you have manually converted it into a project or project task.

Impact

The extent of the incident distorting expected service levels: high impact (High), medium impact (Medium), and low impact (Low).

OBS

Organizational Breakdown Structures is a hierarchical unit structure. OBS helps to view the framework of an organization from both a visual and functional perspective for aggregation, drill down, and resource searching.

Priority

The priority of the incident being resolved in terms of high priority (High), medium priority (Medium), and low priority (Low).

Resource

A person who can be assigned to work on an incident or other investment. A resource can be associated with skills, primary role, resource pools, and OBS. A resource profile has properties such as resource name, email address, employment type, manager, available hours per day, target billable rate, and standard cost. A resource does not have to be a CA Clarity PPM user.

Service Connect

A series of in-built connections to IT Service Management (ITSM) applications that transfer incident data into CA Clarity PPM.

Urgency

The measure of the business criticality of an incident in terms of high urgency (High), medium urgency, and low urgency (Low).

How to Get Set Up with Demand Management

To use Demand Management, verify that you have the following:

- The Demand Management module installed and have a valid license for it.

- Access to Demand Management. Access rights control access. The rights can be granted for the two components of Demand Management: ideas and incidents. One or both of the following access rights is required:

  Incidents - Access

  Allows the user to access the incident pages.

  Type: Global

  Ideas - Navigate

  Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

  Type: Global

To use Demand Management, log in to CA Clarity PPM. Depending on your access rights and role, select either Ideas or Incidents from the Demand Management menu.

Chapter 2: Demand Management Configurations

This section contains the following topics:

How to Set up for Incident Financial Defaults

Before a resource can enter financial data for incidents, do the following:

- Set up the rate matrices and financially enable all resources that works with incidents

- Create logical groups of investments

  See the *Financial Management User Guide* for more information.

- Define default financial properties for investments

Investments only support investment-level allocations and chargebacks.

Incident Categories

Part of setting up Demand Management is to create logical groups of investments named incident categories. Incident categories let you classify incidents of a particular type. They allow you to configure logical groupings of incidents that reflect your organization structure. You can then create and associate investments with these incident categories.

In small organizations, where resources work with all incident categories, you can add all resources to a group. Then assign the group to an incident category. In a larger organization, where resources are specialists, you can create groups, and add resources to groups based upon their expertise. Then assign the groups to different incident categories.

How to Work with Incident Categories

Once you have created incident categories, resources can log incidents. Next, define the incident category properties, associate your investments with incident categories, and grant resources, groups, and OBS units access to the incident category.

Use the Create Incident Category page to create an incident category.

Follow these steps:

1. Open Administration, and from Data Administration, click Incidents.

   The setup page appears.

2. Click New.

   The create page appears.

3. Complete the following fields:

   Category Name

   Defines the short name for the incident category.

   Category ID

   Defines the unique identifier for the incident category.

   Description

   Defines a brief description.

4. Click Save and Return.

Associate Investments with Incident Categories

Once you catalog your investments, you can associate investments-assets, applications, products, services, and other work-with incident categories individually or using a batch process. For example, you can associate the monitor, keyboard, and mouse assets with the Hardware: Peripherals incident category.

You can also associate investments with an incident category from the incident.

Before associating your investments with an incident category, select the affected investments within an incident category.

Follow these steps:

1. Open Administration, and from Data Administration, click Incidents.

   The setup page appears.

2. Click the name of incident category to associate your investment with.

   The properties page appears.

3. Click Associated Investments.

4. Select an investment for the Select Investments field.

5. Click Save.

Control Access to Incident Categories

Use the Access to this Category pages to control resources, groups, and OBS units that have access to an incident category.

Follow these steps:

1. Open Administration, and from Data Administration, click Incidents.

   The setup page appears.

2. Click the name of the incident category.

   The properties page appears.

3. Open the Access to this Category menu and click on of the following options:

   Full View

   Displays a list of all resources, groups, and OBS units having access to the incident category. Also, the access rights of resources, groups, and OBS units have to this category.

   Resource

   Defines the resources to grant access to this incident category.

   Group

   Defines the groups to grant access to this incident category.

   OBS Unit

   Defines the OBS units to grant access to this incident category.

4. Click Add and select the check box next to each access right, and click Next.

5. Select the check box next to each entity (resource, group, or OBS unit), and click Add.

   Note: The list of entities that appears depends upon your selection.

Set the Incident Category Priority

Use the incident priority matrix to escalate incidents based on impact and urgency. You can set the priority levels for the matrix. For example, low, medium, or high. The impact values are plotted against the urgency values. The intersection of every impact and urgency value becomes the incident priority.

When you save an existing incident, the incident priority is recalculated based on changes made to the incident priority matrix.

Follow these steps:

1. Open Administration, and from Data Administration, and click Incidents.

   The setup page appears.

2. Click Priority Setup and select the incident priority for a given impact and urgency combination.

3. Save the changes.

Assign Investments to Incidents

CA Clarity PPM is often not the primary data source for incidents. You can use the XML Open Gateway to capture incidents from other systems and bring them into CA Clarity PPM. Often incidents are imported with incomplete investment data. The incidents can have individual effort entries not associated with an investment. In this case, you can assign a single investment to all such effort entries.

See the *XML Open Gateway Developer Guide* for more information.

Follow these steps:

1. Open Administration, and from Data Administration, click Incidents.

   The setup page appears.

2. Open Assign Investment and select the check box next to the incident to assign an investment.

3. Click Assign.

   The investment is assigned to the incident.

Incident Jobs

CA Clarity PPM provides the following jobs for incidents:

- Post Incident Financials job
- Post Incident Effort Chargebacks job

Check for Errors

Follow these steps:

1. Open Administration, and from Data Administration, click Incidents.

   The setup page appears.

2. Click Processing Errors.

Chapter 3: Incidents

The overall goal of managing incidents is for an organization to return to the normal service level as soon as possible. Incident management allows an IT organization to capture, forecast, and decide on the work undertaken by its users.

This section contains the following topics:

Incidents Overview

Demand Management provides the functionality necessary for your organization to prioritize and manage all unplanned work. Unplanned work includes incidents, ideas, or requests for enhancements that consume resources on a daily basis. Together with planned project work, unplanned work creates the total IT demand. Use Demand Management to assess the cost incurred due to unplanned work and to view resource use.

An incident is any event that does not form part of the standard operation of a service. The incident can potentially cause an interruption to or a reduction in the quality of that service. Incidents include hardware or software, and service requests.

An IT service request is a request from a user for support, delivery, information, advice, or documentation, not being a failure in the IT infrastructure. IT service requests are an important part of IT Service Management. Within Demand Management, you can create incidents to capture service requests and the associated information regarding the assignment, discussion, resolution, and time spent. This data is key to any IT department day-to-day operations. Without incidents, an organization and its users can experience unnecessary extended interruptions resulting in increased costs to the company.

Incident Components

Incidents consist of the following components:

Incident properties

Use the incident properties pages to define any view incident basics, such as its short description, category, status, urgency, and impact. In addition, you can convert the incident into a project or project task from the Incident Properties page.

Associations

Use the Associations menu to view a list of projects and project tasks from which this incident was converted.

Effort

Use this component to view a list of the resource effort on timesheets to resolve this incident.

Notes

Use this component to add notes to your incident or to view a list of notes posted to your incident.

Processes

You can use CA Clarity PPM processes to automate certain elements of demand management. For example, you can create a process that notifies the incident manager when the incident status changes to "Resolved". You can also define a process to implement your incident, such as setting the incident urgency to "High".

Your CA Clarity PPM administrator can define incident type-specific processes or global processes designed to work on a specific incident.

You can create and run processes on incidents.

See the *CA Clarity Basics User Guide* for more information.

Audit

This component provides a way to track the history of specific activities that occur for an incident. Your CA Clarity PPM administrator, who determines which fields are audited and what information is stored in the audit trail, sets up Auditing. If Audit Trail is enabled and you have the appropriate access rights, the Audit menu displays when you open your incident. Use this menu to view a log of change, addition, or deletion records for any of the fields chosen for auditing.

See the *CA Clarity Basics User Guide* for more information.

How to Get Started with Incidents

Before you report and manage incidents, verify if your CA Clarity PPM administrator has set up the incident category mapping. If this step is not completed, the following error message appears when you try to access incidents for the first-time:

ITL-0514: Incident category must be created before incident instance can be created. Please contact your administrator.

See the *Administration Guide* for more information.

An IT worker or a requester can log an incident. Resources with either role have adequate access rights to created new incidents. Once you have logged the incident, you can view and edit the incidents you have created from the Reported by Me menu. IT workers can view a list of all incidents associated with the incident category to which they are assigned from the Assigned to Me menu.

Incidents Integration with Service Management Vendors

Create incidents in CA Clarity PPM, or through integrations with other systems that already capture help desk tickets, incidents, and service requests. Typically the primary data source for incidents is from other systems.

If your organization uses an existing service management vendor, use the XML Open Gateway to capture data in CA Clarity PPM. XOG and the Service Connect in-built integrations to IT Service Management (ITSM) systems support the integrations. You can use the XML Open Gateway to import incidents and any associated notes and effort. Once imported, the incidents are ready to be part of the demand management process.

See the *XML Open Gateway Developer Guide* for more information.

How to View and Manage Incidents

Use the Incident List page to view incidents assigned to you, reported by you, or reported by others.

From the Incident List page, you can do the following:

- Log new incidents (see page 21).

- Assign resources to incidents (see page 27).

- Modify contact information (see page 28).

- Set the incident priority (see page 29).

- View project and task associations (see page 33).

- Add incident notes (see page 33).

- Convert Incidents in to planned work (see page 35).

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Open the following menus to view particular incidents:

   - Assigned to Me

   - Reported by Me

   - Reported by Others

Types of Incidents

You can view a list of incidents to which you have rights to view on the Incident List page. Open the Incident List page to view incidents that are assigned to you, reported by you, or reported by others.

Assigned to Me

Displays the Incident List page with a list of incidents to which requestors or IT workers are assigned. If you are assigned an incident, the list also displays any incidents you report. Assigned to Me appears. Or, if you have the Incidents - Manage Category Incidents access right for at least one incident category.

You can specify how you are notified of new incidents or of incidents assigned to you. These account settings are handled on the Account Settings: Notifications page.

See the *CA Clarity Basics User Guide* for more information.

Reported by Me

Displays a list of incidents you report to requestors and IT managers, and any assigned to you.

Reported by Others

Displays a list of incidents assigned to you, or reported by other resources. The list includes incidents mapped to incident categories to which you have access rights, either directly or by your association to a group.

The page appears if you have either the Incidents - Create/Edit - All access right, or the Incidents - Manage Category Incidents access right.

Log New Incidents

You can create an incident to report new incidents or work requests from Demand Management, or directly from the investment.

To create an incident, you require the following access rights for at least one incident category:

- Incidents - Create
- Incidents - Select Category

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click New.

   The create page appears.

3. Complete the following fields in the General section of the page:

   Short Description

   Defines the name of the incident. Make the name short and descriptive.

   Tracking ID

   Defines the tracking number for this incident. If auto-numbering is enabled, the field is read-only.

   Detailed Description

   Defines the detailed description for the incident.

   Type

   Indicates a type for this incident. Select Incident or Service Request from the drop-down.

Category

Defines the classification for this incident and helps to trace costs for unplanned work. Click the Browse icon to select the incident category for this incident.

Status

Indicates the status for this incident. The status of a new incident is set to "New" by default when you first save it.

Select one of the following from the drop-down to change the status: New, Assigned, Work In Progress, Escalated, On Hold, Resolved, and Closed.

Urgency

Defines the critical measure the incident has based on business needs. Select one of the following: Low, Medium, and High.

Default: Medium

Impact

Defines the extent to which the incident leads to a distortion of expected service levels. Select one of the following from the drop-down: Low, Medium, and High.

Default: Medium

Override Priority

Indicates if the priority of the incident can be overridden. Incident priority is ranked by the Incident Priority matrix based on urgency and impact selections.

This field is displayed only if you have the Incidents - Override Priority access right. Select the check box to override the priority of the incident.

Priority

Defines the order of resolving incidents based on impact and urgency. If you do not have the Incidents - Override Priority access right, the priority is system-generated and read-only. Otherwise, first select the Override Priority check box and then select a priority from the drop-down: Low, Medium, and High.

Date Created

After an incident is submitted, displays the date and time of creating the incident. The field is read-only.

Start Date

Indicates the date the IT worker is expected to start working on the incident.

Note: Verify that you have the Incident - Create/Edit access right to view the field.

Expected End Date

Indicates the date the IT worker is expected to complete the work and mark the incident resolved.

Estimated Total Effort

Defines the estimated total amount of effort to resolve the incident.

Note: Verify that you have the *Incident - Create/Edit* access right to view the field.

Actual Total Effort (Hours)

Displays the sum of all the hours from individual effort entries for the incident. This field is read-only.

Resolved Date

Indicates the date the incident status is set to "Resolved".

Verified Date

Indicates the date the incident resolution is accepted and verified for closure.

Attachment

Indicates if a file relating to the incident is attached. Click the Browse icon and attach the file. You can add up to ten file attachments.

4. Complete the following fields in the Primary Contact section:

Name

Defines the contact for this incident. By default, it is resource currently logged in.

Email

Defines the primary contact email address.

Home Phone

Defines the primary contact home phone number.

Work Phone

Defines the primary contact work phone number.

Mobile Phone

Defines the primary contact mobile phone number.

Pager

Defines the primary contact pager number.

Fax

Defines primary contact fax number.

5. Save the changes.

How the Assign Incidents Process Works

The process administrators use the Assign Incidents process - an incident approval process - to manage the assignment, review, and completion of incidents. By default, the process is not active. Before it can be started, the process administrator activates the process. The requestor logs an incident, the process starts automatically. The process can be customized with additional business rules with approval from the process administrator.

See the *Administration Guide* for more information.

Assign Incidents Process Flow

The Assign Incidents process has steps that can be triggered.
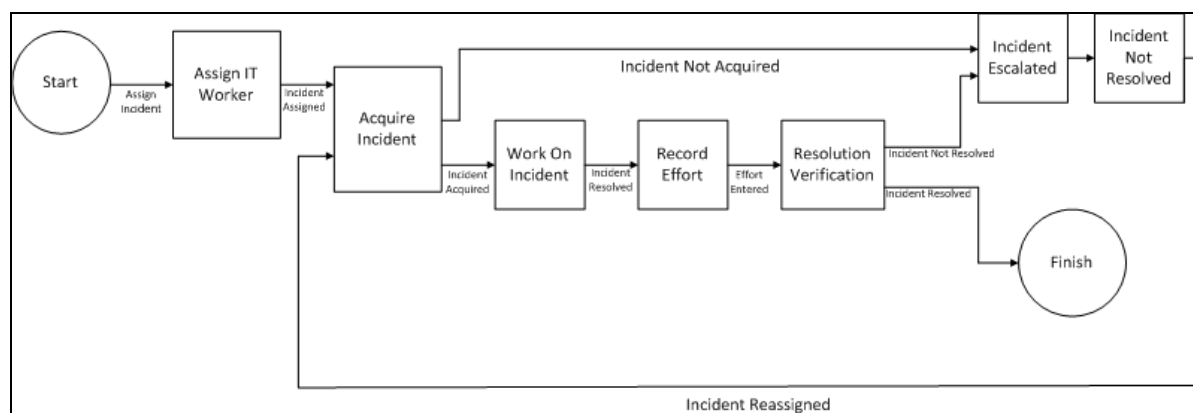
The following steps can be triggered in the process:

Assign IT Worker

This step is triggered when an incident is first logged. This step triggers CA Clarity PPM to run the Assign Incidents job and, when the job has finished, to mark this step as complete. This step sends an action item to the IT worker to review the incident to which they have been assigned. Once this step is complete, the Acquire Incident step starts.

Acquire Incident

This step is triggered when either the Assign IT Worker or the Incident Not Resolved step is complete. This step sends an action item to the IT worker to review and accept the newly assigned incident. During the IT worker review of the action item, the IT worker can either accept or reject the assignment. If the assignment is rejected, the Incident Escalated step starts. If the assignment is accepted, the Work On Incident step starts.

Work On Incident

This step is triggered when the Acquire Incident step is complete. This step sends an action item to the IT worker to work on the new assignment. The IT worker then works on the incident and then marks the action item as done. Once marked as done, the Record Effort step starts.

Record Effort

This step is triggered when the Work On Incident step is complete. This step sends an action item to the IT worker to record the effort spent on the incident. The IT worker then requires to record the effort and mark the action item as done. Once marked as done, the Resolution Verification step starts.

Resolution Verification

This step is triggered when the Record Effort step is complete. This step sends an action item to the requestor to verify and confirm that the incident has been satisfactorily resolved. During their review of the action item, the requestor can either approve or reject the resolution. If the resolution is approved, the process ends. If the resolution is rejected, the Incident Escalated step starts.

Incident Escalated

This step is triggered when either the Acquire Incident or the Resolution Verification step is complete. This step changes the status of the incident to "Escalated". Once this step is complete, the Incident Not Resolved step starts.

Incident Not Resolved

This step is triggered when the Incident Escalated step is complete. This step sends a notification to the IT manager that the incident has not been resolved and to review and reassign the incident. When the IT manager marks the action item as done, the Acquire Incident step starts.

Starting and Terminating Assign Incidents Process

Starting the Process

Once the Assign Incidents process is validated and is active, it can be started from the Incident: Processes page. An instance of the Assign Incidents process is created automatically each time an incident is submitted for approval.

Terminating the Process

The Assign Incident process terminates when the **Resolution Verification** step is complete.

Resolving and Closing Incidents

Resolving Incidents

Once the IT worker has resolved the incident, open the incident and change the status to "Resolved". Then, enter a date in the Resolved Date field. Use the Incident Properties page to edit. Setting the status of an incident to "Resolved", when the Assign Incidents process is active and running, triggers a notification. The notification asks the requestor to verify and confirm the resolution.

Note: To select and save a date in the Resolved Date field, you must have the Incident - Create/Edit access right.

Closing Incidents

Once the requestor has accepted the resolution of the incident, the IT worker requires to change the status of the incident to "Closed". The status is specified on the Incident Properties page. If the Assign Incidents process is active and running, setting the status of an incident to "Closed", triggers a notification. The notification informs the requestor that the incident is closed. This process does not change the status of an incident to "Closed".

View Newly Assigned Incidents

IT workers receive notifications when an IT manager assigns work on an incident. The following procedure explains how to view incident notifications.

Follow these steps:

1. Open Home, and from Personal, click Organizer.

    The Action Items portlet displays with other portlets.

2. Click Notifications.

3. In the Show field, select Incidents.

    The number of incident notifications you have received are displayed.

4. Click the Incidents link in the portlet.

    The notifications page appears.

See the *CA Clarity Basics User Guide* for more information.

Assign Resources to Incidents

Verify that all incidents are assigned to a resource. Use the Assign To field on the Incidents List page to assign and reassign incidents. The field displays on the page after you submit the incident for the first-time.

When you assign an incident, a notification is sent to the user assigned. The method of receiving notifications depends on the assigned user personal notification settings.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click the incident short description.

   The properties page appears.

3. Click the Browse icon located next to the Assigned To field.

   The selected resource is assigned to the incident.

4. Save the changes.

Reassign Incidents

You can reassign incidents that are unresolved to another user. When you assign an incident, a notification is sent to the assigned user. The method of receiving notifications depends on the assigned user personal notification settings.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Select the check box next to the incident you want to reassign.

3. Click Reassign.

   The select resources page appears.

4. Select the user you want to assign.

5. Click Reassign.

   The confirmation page appears.

6. Click Reassign.

Modify the Incident Contact Information

The primary contact defaults to the resource currently logged-in and includes the resource default contact information. When you assign another resource as the primary contact for the incident, the resource contact information is also updated when the page is saved.

If you change the resource contact information, the changes are saved for the incident. The resource default contact information does not change.

See the *Resource Management User Guide* for more information.

Follow these steps:

1.   Open Home, and from Demand Management, click Incidents.

     The list page appears.

2.   Click the incident short description to open the incident.

     The properties page appears.

3.   Scroll down to view the Primary Contact section of the page.

4.   Select another resource as the primary contact in the Name field.

5.   Save the changes.

Modify the Incident Category

You can enter or change the incident category for an incident. Incident categories help to distinguish real incidents from IT service requests.

All incidents must belong to an incident category. Incident category mapping can occur at the investment level or at the administration level. Both require particular access rights. The following procedure explains how to change the incident category for the incident.

See the *Resource Management User Guide* for more information.

Follow these steps:

1.   On the Incident List page, click the incident short description to open the incident.

     The properties page appears.

2.   Select a new category in the Category field.

3.   Save the changes.

Incident Priority

You can modify or override the incident priority. An incident priority helps IT managers determine the plan in resolving incidents. The priority of an incident is a system-generated value the Incident Priority matrix determines.

Modify the Incident Priority

Modify the incident priority by altering the Impact and Urgency fields. You can also adjust the impact and urgency values by altering the timing of the incident or by temporarily altering the affected hardware or software.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click the short description to open the incident.

   The properties page appears.

3. Do one or both of the following:

   – To modify the impact of the incident, select a value from the Impact down-down. Choices are: Low, Medium, or High.

   – To modify the urgency of the incident, select a value from the Urgency drop-down. Choices are: Low, Medium, or High.

4. Click Save.

Override the Incident Priority

During the Evaluation of Priority phase of the incident, override the incident priority in the queue.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click the incident short description to open the incident.

   The properties page appears.

3. Select the Override Priority check box.

   If you do not have the Incidents - Override Priority access right, the Override Priority field appears as read-only.

4. Select the priority from the drop-down. Choices are: Low, Medium, and High.

5. Save the changes.

Incident Priority Matrix

The priority of an incident is a function of its impact and urgency. Based on the settings on the Incident Priority matrix, the CA Clarity PPM administrator sets the priorities. Use the Incident Priority matrix to plot the impact values against the urgency values.

See the *Administration Guide* for more information.

Change the Incident Status

The status of an incident is its current state in CA Clarity PPM. When you first log an incident, the status of the incident is "New." As an incident is worked on, the status of the incident changes. Use the Status field to alter its state.

The following is a list of values you can set for the status of an incident:

New

The incident is new and not been reviewed and resolved.

Assigned

The incident is open and a resource is assigned (Assigned To field).

Work In Progress

The incident is open and the IT worker is working on the incident.

Escalated

The incident is open but requires a higher-level authority to invest resources.

On Hold

The incident is open. But the IT worker is awaiting information to resolve the incident.

Resolved

The incident is no longer open. Either the IT worker cannot reproduce the incident and the requestor did not supply adequate information, or lost contact with the service desk. Or, the incident is closed but is pending verification from the requestor. If the Assign Incidents process is active and running, setting the status of an incident to "Resolved", triggers a notification. The notification asks the requestor to verify and confirm the resolution.

Closed

> The incident is no longer open. The requestor is satisfied with the resolution of the incident. Incidents that are imported into CA Clarity PPM through the XML Open Gateway also have a "Closed" status.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

    The list page appears.

2. Click the incident short description to open the incident.

    The properties page appears.

3. Select a value from the Status drop-down.

4. Click Save.

Flag Incidents for Conversion

Incident scope can reach a point that requires handling as a project or project task. The IT worker assigned to work on the incident flags the incident for conversion and assigns the incident to a project manager.

Depending on the personal notification settings of the project manager, a notification to convert the incident into a project or project task is sent.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

    The list page appears.

2. Click the incident short description to open the incident.

    The properties page appears.

3. Select the Flagged for Conversion check box.

4. Select a project manager in the Assigned Project Manager field.

5. Save the changes.

Enter Time Spent (Incident)

You can link directly to your timesheet to record the time you spend working on your assigned incidents. Use the Enter Time button on the incident effort page and the incident properties page.

The incident effort page displays a chronological list of the timesheet entries you recorded for this incident. The incident effort is used to calculate costs for unplanned work. The time you spend and enter for the incident does not get carried forward when the incident is converted. The incident effort and the new project or task effort represent separate activities and are time-tracked, separately.

You can enter time spent working on incidents from the incident or from CA Clarity PPM timesheets.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click the incident short description to open the incident.

   The properties page appears.

3. Click Enter Time.

   The Select Investment and Time Period page appears.

4. Complete the following fields:

   At Investment

   Click the Browse icon to select the investment to charge the resulting cost. The investments that display for selection are associated with the incident category of the incident. And the incidents to which you have access rights for incident tracking.

   At Time Period

   Select an open timesheet period from the drop-down.

5. Click Save and Return.

   The selected timesheet for the period opens.

6. Log the time you spent working on the incident on your timesheet.

View Project and Task Associations

Use the incident associations page to view a list of the projects and project tasks associated with the incident. An association to the incident occurs any time you create a project or project task for the incident.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

    The list page appears.

2. Click the incident Short Description link, and click Associations.

How to Manage Incident Notes

Use the incident notes page to add and view private and public notes. Notes let you record additional information about the incident you are working on. All the notes the IT worker adds, displays in chronological order in a list. You can view and sort the list of notes and add additional notes.

All incident notes are public by default and viewable to the requestor and to the IT worker. Once a note is saved, it becomes read-only and cannot be modified or deleted. A timestamp and the name of the resource who added the note is stored with the note.

You can do the following:

■   Add notes (see page 33).

■   View notes (see page 34).

Add Notes to Incidents

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

    The list page appears.

2. Click the incident short description to open the incident and add a note.

    The properties page appears.

3. Open the Notes menu and complete the following fields:

    Subject

    Defines the subject for the note.

    Description

    Defines a short description of the note.

4. Click Add.

    The new note appears in the list. Notes are listed in the order created. The most recent note appears at the top of the list.

5. To sort the list, click the column header.

    For example, to sort the list by subject, click the Subject column header. When sorted, an arrow appears in the column header.

    To reverse the sort order, click the column header again. Do the same to sort by the Entered By and Date Entered columns.

6. Click Return.

View Incident Notes

You can view an overview of all of the notes for a particular incident. All the additional notes display in the notes list.

Follow these steps:

1. Open the incident.

2. Click Notes.

3. Click the note subject to open the note.

    Details of the note displays.

4. Click Return when you are done.

View Audit Fields for Incidents

You can view all the previous and new values of fields changed, the resource who changed them, and the date of changing the values. The fields display in the bottom half of the Incident Audit Trail page.

To record audit trail, specific field property attributes require to be set up for auditing.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

    The list page appears.

2. Click the incident short description.

    The properties page appears.

3. Click Audit.

   The audit trail page appears.

Manage Automated Incident Processes

You can create, track progress, and delete automated incident processes. Verify that the related processes are active and valid.

Note: Verify that you have the appropriate access rights to access this menu.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click the incident short description.

   The properties page appears.

3. Click Processes.

   The processes page appears.

4. From the Processes menu, click the following submenus to view processes in various states:

   ■ Available. Lists any processes that are already created for the incident.

   ■ Initiated. List processes already started.

See the *Administration Guide* for more information.

How Incidents are Converted into Planned Work

Converting an incident or work request into a project or project task converts unplanned work into planned work. When incidents become planned work, they are converted into either projects or project tasks.

1. Typically, at IT worker assigned to work on the incident does the following:

   a. Flags the incident for conversion.

   b. Assigns the incident to a project manager.

   c. Closes the incident.

2. The project manager converts the incident into a project or project task. Only the project manager assigned to the incident can convert the incident into a project or project task.

You can track projects and project tasks associated with the incident. Once an incident is converted, use the Incident Associations page.

Convert Incidents into Projects

If you get a notification from an IT worker to convert an incident to a project task, use the notification to link to the incident. How you are notified depends on your personal notification settings.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click Assigned To Me.

3. Select the check box next to the incident, and click Convert to Project.

   The select conversion type page appears.

4. Do one of the following:

   ■ To convert the incident into a new project based on a project template:

     – Select Project from Template and click Next.

       The Select Project Template page appears.

     – Select the project template.

   ■ To convert the incident into a new project, select Project.

5. Click Next.

   The create page appears. Details from the incident page, like the name of the project, manager, start and finish dates are replicated on to the project page.

6. Complete the remaining fields on the page.

   See the *Project Management User Guide* for more information.

7. Save the changes.

   Note: If more work is required to resolve the incident, the IT project staff can reopen the incident.

Convert Incidents into Project Tasks

If you receive a notification to convert an incident into a project task, use the action item to link to the incident. Each new project task created is added to the bottom of the hierarchy of WBS (work breakdown structure) within the project.

Only the project manager assigned to the incident can convert the incident into a project task. A task can only be associated with an existing and active project. You can convert only one incident at a time.

Follow these steps:

1. Open Home, and from Demand Management, click Incidents.

   The list page appears.

2. Click Assigned To Me.

3. Select the check box next to the incident, and click Convert to Task.

   The select project page appears.

4. Select the project to associate the task.

5. Click Add.

   The create page appears.

   Details from the incident page, like the name of the project, manager, start and finish dates are replicated on to the task page.

6. Complete the remaining fields on the page.

   See the *Project Management User Guide* for more information.

7. Save the changes.

   Note: If more work is required to resolve the incident, the IT project staff can reopen the incident.

Incident Data Mapping

When an incident is converted into a project or a project task, data is carried forward with the incident to the new project. If the contact or assigned resource is not a team member of the project, data does not carry forward. Effort data is not carried forward to the project or project task during conversion.

When you convert an incident into a project or project task, you cannot link back to the incident from the project or project task. A link exists only from the incident to the converted project or project task.

The data moved over to the project or project task is defined in the following table:

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)

Chapter 4: Ideas

Ideas are the initial stage of creating new opportunities for investment such as projects, assets, applications, products, services, and other work. Ideas lay the foundation for a specific type of investment by serving as a container for pertinent information. For example, you might have an idea that is valuable enough to be evaluated and converted into a project, service, or investment.

This section contains the following topics:

Idea Overview

Ideas let you conduct more expedient analysis earlier to weed out unwanted ideas before they become investments and devour vital resources. You can track and convert ideas into investment opportunities. These investment opportunities can then be approved as part of your company portfolio. You can define an idea for a project, product, asset, application, service, or other work.

You can also include ideas as part of an investment hierarchy. An idea can be added as a child of an investment hierarchy, have simple budgeting, and have a staff.

Idea Audit Trail

Audit Trail provides a way to track the history of specific activities that occur for an idea. Your CA Clarity PPM administrator determines which fields are audited and what information is stored in the audit trail. If Audit Trail is enabled for ideas and you have the appropriate access rights, the Audit page displays when you have your idea open. Use this page to view a log of change, addition, or deletion records for the fields chosen for auditing.

See the *CA Clarity Basics User Guide* for more information.

Idea Components

Ideas consist of the following components:

Idea properties

Use the idea properties pages to define idea basics from its subject and schedule. In addition, you can define budget properties from the properties pages.

Team

Use the Team menu to build a team that includes the staff who performs the work.

Budget

Use this component to create a simple budget and/ or forecast for your idea.

Reporting

Use CA Clarity PPM reports to track and analyze idea activities and progress.

See the *CA Clarity Basics User Guide* for more information.

How Ideas Status Flow Works

A new idea has an "Unapproved" status. When you submit a completed idea for approval, the idea status changes to "Submitted for Approval". The approver can either approve, reject, or change the idea status to "Incomplete". Automated idea processes move the workflow.

How the Idea Approval Process Works

The Idea Approval process is an out-of-the-box idea process. The process helps the CA Clarity PPM process administrators to manage the submission, review, approval, or rejection of ideas. By default, this process is not active. The CA Clarity PPM process administrator activates before the idea can be started.

Customize a process using additional business rules. The process requires the CA Clarity PPM process administrator approval.

See the *Administration Guide* for more information.

For each action item this process sends, a notification is sent that coincides with the action item. The process locks the idea status for the duration of the approval process and does not allow any approver to change manually the idea status.

Following are the steps triggered from the Idea Approval process:

Set Status to Approved

Triggers when an Approver uses the action item to approve the idea. The idea status is set to "Approved".

Set Status to Rejected

Triggers when an Approver uses the action item to reject the idea. The idea status is set to "Rejected".

Set Status to Incomplete

Triggers when an Approver uses the action item to mark the idea as incomplete. The idea status is set to "Incomplete".

Resubmit

Creates and sends an action item to the idea originating requestor to complete and resubmit the idea. The Approver then requires to use the action item to resubmit the idea, or to set the idea status to "Submitted".

Notify Approved

Sends a notification to the idea originating requestor that the idea is approved.

Notify Rejected

Sends a notification to the idea originating requestor that the idea is rejected.

Set Status to Submitted

Triggers when an Approver uses the action item to resubmit the idea. The idea status is set to "Submitted" and returns to the start of the process.

Starting the Idea Approval Process

An instance of Idea Approval process is created automatically each time you submit ideas for approval. During the process, the approver reviews the idea. The idea can be approved, rejected, or set to incomplete to request additional information from the idea originating requestor. Once your idea is approved, you can convert it into any project, service, or investment to which you have the rights to create.

Note: You can only have access to one Idea Approval process at any given time. The process administrator cannot grant access to more than one Idea Approval process. Otherwise, an error occurs when you click Submit for Approval.

Sending Action Items to Approve Ideas

Submitting an idea for approval, creates an instance of the Idea Approval process. An action item is sent to each user (Approver) that has the right to approve the idea. The action items requests that the Approver review and approve the idea.

Another action item is sent to the idea originating requestor when the idea is approved or rejected. If the status is changed to "Incomplete", the originating requestor is sent an action item to provide additional information and resubmit the idea.

As multiple users can have the right to approve the idea, contradictory responses could get recorded. For example, an Approver approves the idea and another reject it before the background process engine cycles. In this case, the outstanding action items are closed, if any, and new copies of the same action item are sent. The new action item states that contradictory responses are received.

Approving Ideas from Action Items

As an Approver, you can receive action items when an idea originating requestor submits an idea for approval. You can review the idea and then approve it from the action item by clicking Approved.

Note: The Idea Approval process changes the Status field to read-only. Therefore, approve the idea from the action item by clicking Approved.

Terminating the Idea Approval Process

The Idea Approval process terminates when you approve, reject, or delete it.

Ideas Imported from Another System of Record

The system of record for ideas is often not CA Clarity PPM. For this reason, you can import ideas from another system of record using the XML Open Gateway to view and manage in CA Clarity PPM. Once imported, the ideas are ready to be part of the portfolio management process.

See the *XML Open Gateway Developer Guide* for more information.

How to Manage Ideas

An idea is the starting point for creating investments and maintaining them in CA Clarity PPM.

You can do the following from the Ideas page:

- Create new ideas (see page 43).
- Manage the idea properties (see page 46).
- Define scheduling information (see page 49).
- Define budget information (see page 50).
- Build a team (see page 56).
- Evaluate ideas using capacity planning scenarios (see page 54).
- Manage parent investment allocations (see page 55).
- Delete ideas (see page 72).

Create New Ideas

Use the create idea page to define your idea general properties, estimated costs and benefits, detailed description, and to start the Idea Approval process. Some of the idea properties are used when you convert the idea into a project, service, or investment.

Follow these steps:

1. Open Home, and from Demand Management, click Ideas.

   The list page appears.

2. Click New.

   The create page appears.

3. Complete the following required fields in the General section of the page:

   Subject

   Defines the idea summary/name. When you convert the idea into a project, service, or investment, the subject is used as a link from the investment to the idea. During the conversion process, the subject becomes the description of the investment.

   Idea ID

   Defines the idea unique ID. If auto-numbering is configured, the field displays as read-only. During the conversion process, the Idea ID is the name of the investment.

Idea Priority

Defines the value assigned to the idea by the idea manager. The value corresponds to the risk priority. Choices are: Low (default), medium, and High.

Description

Details the description of the idea.

Manager

Defines the name of the resource that manages and owns the idea.

The idea manager has access to the idea budget and schedule properties.

Originating Requestor

Defines the name of the resource originating the idea request. By default, the field displays the name of the resource creating the idea.

Note: If you select another resource, your access rights to view the idea could cease. In particular, you require Idea – View – All or the Resource – Idea – View access right to this resource to view this idea.

Active

Specifies if the idea is active. Activate the investment to allow resources to view ideas in portfolios and in any capacity planning portlet.

Default: Selected

General Notes

Specifies additional information about the idea not covered by the idea description.

4. Complete the following fields in the Estimated Costs and Benefits section of the page as needed. Some of these properties are used when you convert the idea into a project, service, or investment:

Estimate Type

Defines the type of estimate benefits, cost, and revenue impact for the idea.

Currency Code

Defines the system currency and a read-only field. If multi currency is enabled, a drop-down list of all active currency codes. During the conversion process, the currency code is the currency code for the investment.

Business Unit

Defines the business unit associated to the idea.

Benefit Description

Defines the general description of the idea benefits.

Estimated Cost

Defines the estimated total cost of the idea. During the conversion process, the estimated cost is the investment planned cost.

Estimated Benefit

Defines the estimated total financial benefit of the idea both in term of revenue and money saved.

Estimated Start Date

Indicates the estimated start date for the idea. The date must be on or before the estimated finish date.

Estimated Finish Date

Indicates the estimated finish date for the idea. The date must be on or before the estimated finish date.

Breakeven Date

Defines the estimated break-even date for the idea. During the conversion process, the break-even date is the budget break-even date for the investment.

5. Complete the following fields in the Detailed Description section:

    Impact on Existing Initiatives

    Defines the description of the impact the idea has on the existing initiatives.

    Risks

    Defines the description of the risks, whether the idea is implemented or not.

    Dependencies

    Defines the description of the dependencies, or list of any dependencies the idea have.

6. In the Organizational Breakdown Structure section, click the Browse icon next to the OBS to associate with the idea for security, organizational, or reporting purposes.

    The OBS-named-Department is used to associate the idea with a CA Clarity PPM department. If multiple OBS exist, the OBS-named-Department is listed last.

    See the *CA Clarity Basics User Guide* for more information.

7. Do one of the following:

    ■ Save the new idea.

    The new idea displays in the list on the Ideas page with the "Unapproved" status.

    ■ Click Submit for Approval to save the new idea and submit it for approval.

    The new idea displays in the list on the Ideas page with the "Submitted for Approval" status.

Main Properties

Main properties let you define base information about the idea.

Follow these steps:

1. To view main properties, open the idea.

   The general page appears.

2. Click the links from the Properties menu to access other main properties pages.

You can do the following:

- Edit general information (see page 46), such as name, manager, goals, status, alignment, and OBS associations.

- Manage scheduling information (see page 49), such as start and finish dates, and tracking methods.

- Manage budget information (see page 50), such as planned cost and benefit, and NPV and breakeven metrics.

How to Manage General Information

From the properties page for an idea, you can take the following actions:

- Associate the idea with an OBS (see page 46).

- Define the target manager (see page 47).

- View a summary of estimated costs and benefits (see page 47).

- View a detailed description of the idea. (see page 47)

- Submit an idea for approval (see page 47).

- Request information about the idea (see page 48).

You can edit the general properties from this page, or from the idea list page.

See the *CA Clarity Basics User Guide* for more information.

Associate Ideas with Organizational Breakdown Structures

Organizational breakdown structures (OBS) controls access, department hierarchies, and reporting. If at least one OBS exists for ideas, you can associate any of these OBS to your idea.

The OBS named Department is used to associate an idea with a CA Clarity PPM department. If several exist, the Department OBS is listed last.

See the *CA Clarity Basics User Guide* for more information.

Define the Target Manager

The target manager is the resource who manages the idea when converted into a project, service, or investment. Recommended to complete the field.

Follow these steps:

1. Open the idea.

   The list page appears.

2. Click the subject of the idea to assign a target manager.

   The properties page appears.

3. Select a resource in the Target Manager field.

   Note: Complete the field before you convert the idea into a project, service, or investment. Otherwise, the resource identified as the idea Manager, becomes the manager for the project, service, or investment.

View Estimated Costs and Benefits

A high-level overview of the idea estimated costs and benefits appear in the Estimated Costs and Benefits section of the properties page. The fields displayed in the section are the same fields that displayed when you first created the idea, on the Create Idea page.

View a Detailed Description

View and edit the impact the idea has on existing initiatives, the risks of the idea, and the dependencies the idea has on existing initiatives. Use the Detailed Description section of the properties page to view the data.

Submit Ideas for Approval

Submit the new idea for approval. You can also submit an idea for approval while still creating.

Follow these steps:

1. Open the idea.

   The list page appears.

2. Click the subject of the idea to submit for approval.

   The properties page appears.

3. Do one of the following:

   ■ Click Submit for Approval.

   ■ Change the status to "Submitted for Approval" and click Save.

   ■ Click Return to return to the Ideas page.

Note: You can submit any idea for approval except ideas that can be converted into projects, services, or investments.

Request More Information

A submitted idea can require additional information before approval and conversion into a project, service, or investment.

Follow these steps:

1. Open the idea.

   The list page appears.

2. Click the subject of the submitted idea.

   The properties page appears.

3. Change the submitted idea status to "Incomplete".

4. In the General Notes field, enter any notes or directions about the additional information that you require from the idea manager.

5. Click Save and Return to return to the Ideas page.

   The Ideas page appears with the idea status as "Incomplete".

6. Send an action item and a notification to the idea manager to provide additional information and to resubmit the idea.

See the *CA Clarity Basics User Guide* for more information.

Deactivate Ideas

Follow these steps:

1. Open the idea.

   The list page appears.

2. Click the subject of the idea to deactivate.

   The properties page appears.

3. In the General section of the page, clear the Active check box.

4. Click Save.

Define Scheduling Information

Use the idea properties page to define the idea start and finish dates, open it for time entry, and define its charge code.

Follow these steps:

1. Open the idea.

   The list page appears.

2. Click the subject of the idea.

   The properties page appears.

3. Open the Properties menu and then from Properties, click Schedule.

   The schedule page appears.

4. In the Schedule section of the page, complete the following fields. Some of these properties are used when you convert the idea into a project, service, or investment:

   Start Date

   Indicates the idea start date. When you convert the idea into an investment, the date is the investment start date.

   Finish Date

   Indicates the idea finish date. When you convert the idea into an investment, the date becomes the investment finish date.

   Set Planned Cost Dates

   Specifies if the planned cost dates are synchronized with the investment dates. Selecting the option for a detailed financial plan does not affect the planned cost dates.

   Default: Selected

   Required: No

5. In the Tracking section of the page, complete the following fields:

   Time Entry

   Select the field to allow staff members to record the time they work on the idea on the timesheets.

   Important! Ensure that you select the Time Entry field to enable staff members to record work on ideas on the timesheets.

   Default: Selected

Track Mode

Indicates the method for the staff members to enter time for hours worked on the idea.

Options:

- Clarity. Staff members record time using timesheets.

- None. Non labor resources track actuals through transaction vouchers, or when enter actuals through a scheduler, such as Open Workbench.

- Other. Import actuals from a third-party application.

Default: Clarity

Charge Code

Select a default charge code to use for all idea tasks. If you enter a different charge code at the task level on timesheets, the task-level charge codes override the idea-level charge code.

See the *CA Clarity Basics User Guide* for more information.

6. Click Save and Return, or Submit for Approval.

Define Budget Information

The idea budget data is essential in managing and analyzing idea portfolios. Correctly defining and recording the idea planned cost and benefit information is key to accurately assessing and analyzing ideas during portfolio management.

You can define budget information from the Idea: Properties: Main - Budget page. With budget properties, you can define metrics. For example, the idea planned cost, NPV, ROI, and breakeven information. Or calculate automatically using the cost of capital. You can also use the fields on the page to set the start and end dates over which the budget is experienced. With budget properties, money flows constantly and evenly over this period.

The values budget properties are applied to only one time period: From the idea start date to the finish date. The dates are applied only to your idea and not to its parent investments.

Follow these steps:

1. Open the idea.

The list page appears.

2. Click the subject of the idea.

The properties page appears.

3. Open the Properties menu and then from Properties, click Budget.

The budget page appears.

4. Complete the following fields in the Financial Planning section:

   Currency

   Defines the currency for the investment.

   Default: System currency

   Budget equals Planned Values

   Specifies if the budget values in the budget properties of an investment match the planned values. If a detailed budget plan exists for the investment, all the field values in the Budget section are display-only. The fields reflect the values in the detailed budget plan. When the check box is cleared, you can edit the budget fields.

   Default: **Selected**

   Calculate Financial Metrics

   Specifies if financial metrics for the investment are calculated automatically. If unselected, you can define the financial metrics manually.

   Default: Selected

5. Complete the following fields in the Financial Metrics Options section:

   Use System Rate for Total Cost of Capital

   Select the field to calculate the total cost of capital at system rate.

   Use System Reinvestment Rate

   Select the field to calculate the total cost of capital at the system reinvestment rate.

   System Rate

   Displays the system rate for calculating the total cost of capital.

   Investment Rate

   Displays the investment rate for calculating the total cost of capital.

   Initial Investment

   Defines the initial investment on the idea.

6. Complete the following fields in the Planned section. Some of these properties are used when you convert the idea into a project, service, or investment:

   Planned Cost

   Defines the idea planned costs. The value is distributed between the Planned Cost Start and the Planned Cost Finish dates.

   Note: When you convert the idea into an investment, the planned cost value supersedes the estimated cost entered in the Estimated Costs and Benefits section of the Idea Properties: General page.

Planned Cost Start

Select the date of starting the idea planned cost.

Planned Cost Finish

Select the date the idea planned cost expires.

Planned Benefit

Defines the total planned benefit you receive from the idea.

Note: When you convert the idea into an investment, the planned benefit value supersedes the estimated benefit entered in the Estimated Costs and Benefits section of the Idea Properties: General page.

Planned Benefit Start

Select the date when the idea planned benefit starts.

Planned Benefit Finish

Select the date when the planned benefit of the idea expires.

Planned NPV

Displays the planned NPV (Net Present Value) of the investment.

Planned ROI

Displays the planned ROI (Return on Investment) of this investment.

Planned Breakeven

The date when the idea planned cost equals the planned benefit. The field is read-only.

Planned IRR

Displays the planned internal rate of return for the investment.

Planned MIRR

Displays the planned modified internal rate of return (MIRR) for the investment.

Planned Payback Period

Displays the date of the investment planned payback period.

7. The following fields display in the Budget section.

Budget Cost

Displays the budgeted cost amount for the investment.

Budget Cost Start

Displays the budgeted cost start date of the investment.

Budget Cost Finish

Displays the budgeted cost finish date of the investment.

Budget Benefit

Displays the budgeted benefit amount of the investment.

Budget Benefit Start

Displays the budgeted benefit start date of the investment.

Budget Benefit Finish

Displays the budgeted benefit finish date of the investment.

Budget NPV

Displays the budgeted NPV (Net Present Value) of the investment.

Budget ROI

Displays the budgeted ROI (Return on Investment) of this investment.

Budget Breakeven

Displays the date when the idea budgeted cost equals the planned benefit. The field is read-only.

Budget IRR

Displays the budgeted internal rate of return for the investment.

Budget MIRR

Displays the budgeted modified internal rate of return (MIRR) for the investment.

Budget Payback in Months

Displays the date of the investment budgeted payback period

8. Submit your changes.

9. View an Overview of Estimated Cost and Benefits.

Capacity Planning Scenarios

Scenarios allow you to apply a systematic methodology to optimize your idea or portfolio. Apply scenarios to your idea to analyze how staffing changes or shifts in dates affect the outcome of your idea or portfolio. You can evaluate your ideas by switching between a scenario and the plan of record.

You can do the following:

- Create capacity planning scenarios (see page 54).
- Apply capacity planning to ideas (see page 54).

See the *Portfolio Management User Guide* for more information.

Create Capacity Planning Scenarios

Create a capacity planning scenario from any idea page that displays the scenario toolbar. The scenario toolbar displays below the page toolbar.

You cannot create portfolio scenarios from the idea but from within a portfolio.

Apply Capacity Planning Scenarios

Use the scenario toolbar to select any existing capacity planning scenarios to which you have access rights (including any portfolio scenarios). When you open an idea and select a scenario, either from a capacity planning scenario-enabled page, or the financial plan page of idea properties, that scenario is set as the current scenario.

How to Manage Allocations to Parent Investment

Use the parents page of the idea hierarchy to view a list of investments and services to which the idea is allocated. Also, helps to view the percentage the idea is allocated to each parent.

You can do the following:

- [Add and remove parent associations](#) (see page 55).
- [View allocations to parent investments](#) (see page 55).
- [Share idea allocation across parent investments](#) (see page 56).
- [Aggregate idea costs to parent investments](#) (see page 56).

Follow these steps:

1. Open the idea.

   The list page appears.

2. Click the subject of the idea to view the investment the idea is allocated to.

   The properties page appears.

3. Select Hierarchy.

   The hierarchy page appears. You can view the details of the parent investment of the idea.

Add and Remove Parent Investment Associations

You can add and remove parent investment associations to and from your idea based on your company business rules. Add or remove associations on one of the parent investment-related set allocations page.

See the *Portfolio Management User Guide* for more information.

Define Allocations to Parent Investments

Allocate ideas to one or more parent investments or services. However, the total allocation percentage of your idea to its parent investments is required to equal 100 percent. View the parent investments and services allocation amounts of an idea on the parents page of the idea hierarchy.

You can define the allocation of the idea to a parent investment from this page.

Follow these steps:

1. Open the idea.

2. Click Hierarchy.

3. Click Add to add parent investments.

4. When all parent investments are added, click in the Allocation field of each parent and indicate the allocation of the idea.

5. Click Save.

Share Ideas Across Investments

You can share ideas between other investments, services, and ideas. For example, you can share an idea for an online banking phone system that supports servers in two areas around the country. First, add the servers as child investments to the online banking phone system idea investment hierarchy. Then, edit the child investment cost allocation percentage and time segments.

Your idea investment allocation percentage dictates the amount that the idea is allocated to parent investment, service, or idea. All cost information displayed in the parent idea hierarchy is based on the allocation percentages.

Aggregate Idea Costs to the Parent Investment

Child idea cost totals are automatically aggregated to its parent investments. During the calculation, the parent idea start and finish date are considered for applying the child idea costs to the parent.

How to Staff a Team

To provide planning data for capacity planning or portfolio planning, you can staff your idea with resources. Staff your idea with a team member to perform up-front work, before approving and converting the idea into a project, investment, or service.

Use the team staff page of an idea to staff your ideas by allocating roles and resources. You can add both labor and non-labor resources. From this page, you can view the bottom-up aggregated work effort by role. You can switch the view to edit the idea direct planned work. The Team menu contains three options: Staff, Detail and Role Capacity.

To view the team staff page of an idea, open the idea, and click Team.

About the Team: Staff Page

To display the team staff page, open the idea and click Team.

Staff members are resources or roles that can be assigned to work on an idea. The staff can record the time worked on the idea on their timesheet. Ideas are not associated with tasks and staffing them does not result in long-term commitments for that staff.

You can use a role as a placeholder when you do not know the name of the resource you want to staff on your idea. Or, if the resource for staffing is not available. You can staff your idea with multiple instances of a role but not multiple instances of a resource.

Use the team staff page of an idea to add staff to the idea. The following describes the columns and icons on the page when you staff resources to the idea:

Properties icon

Opens the resource profile. You can view profile information and change allocations, including planned and hard allocations.

See the *Resource Management User Guide* for more information.

Resource Finder icon

Opens the Find Resources page for the selected resource. On this page, you can replace the resource or role with a different resource or role.

Resource column

Click a resource name to view and edit the resource general properties.

Resource Allocation

Opens the Resource/ Role Allocations page. You can update the resource allocation.

Role

Displays the role of the resource, which can be different from the primary role selected in the resource profile.

Time column

Displays a yellow checkmark if the resource or role is allowed to enter time for the idea.

Booking Status column

Displays the resource or role booking status.

Values

– Hard. The resource is committed to the idea.

– Soft. The resource is tentatively scheduled for the idea.

Mixed. Both soft and hard allocation exists for the resource.

Start column

Displays the team member allocation start date. If not defined, the date defaults to the start date of the idea.

Finish column

Displays the team member allocation finish date. If not defined, the date defaults to the finish date of the idea.

% 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. This field cannot be edited but changes to reflect edits you make using:

- The setting allocation options.

- The new allocation curves defined on the Idea Staff Member: Properties page.

- The Shift Allocation option.

Allocated Actuals

Displays the total number of hours the resource has recorded to date on this idea.

Incident Actuals

Displays the time posted to incidents associated to this idea.

Total Actuals

Displays the aggregated total actual time posted. This value is the sum of the allocated actuals and the incident actuals.

Add Resources or Roles to the Idea Staff

The team staff page of an idea displays a list of the resources or roles that are added to your idea. All resources are automatically allocated at 100 percent of their available working days. You can adjust the value to meet your needs.

When adding resources to your idea staff, chances of over-allocation of the resource can happen. In this case, a confirmation page appears to either over-allocate the resource, or to accept the remaining availability of the resource.

Note: You can add multiple instances of a role to an idea. But not multiple instances of the same named resource. For example, assign "programmer (1)" and "programmer (2)" to represent two different requirements with a programming role.

Follow these steps:

1. Open the idea.

2. Click Team.

3. Do one of the following:

   ■ Click Add to select individual resources or roles for the idea staff.

      The Select Resources page appears.

   ■ Click Add/Update by OBS to add all the resources in a selected OBS unit to the idea staff.

4. Select the resources and roles to add to the idea staff.

   Use the Search Filter to find resources or roles by name or other criteria.

5. Click Add to add the resources and roles.

6. Save the changes.

Book Overallocated Resources

The available hours for a resource can be less than the total number of requested hours. In this case, instead of the Booking Confirmation page, the Remaining Availability Confirmation page appears.

Adding a resource to the project or investment displays overbooking in the Remaining Availability Confirmation page. If the resource is booked at 100 percent (default) of their availability, the 100 percent Resource Allocation column lists the number of utilized hours. The Remaining Availability column indicates the actual number of available work hours for the resource on your project.

When the confirmation page appears, select one of the following options:

Overallocate

   Over-allocates the resource.

Remaining Only

   Books the resource for the amount listed in the Remaining Availability column.

View Role Capacity on Ideas

The role capacity page of idea team provides an aggregated view of all role demand whether generated by role-based team members or named resources. You can view this information against the capacity of the resources that fill those roles. To access the page from the idea Team menu, select Role Capacity on the page toolbar. Resources without a team role are captured on this page in the [No Role] row.

From the role capacity page, you can view:

- Role allocation to the idea vis-a-vis allocation to other investments and over-allocations.

- Available role capacity for this idea.

You can view this information from inside and outside of a scenario. If a role appears over-allocated, click Staff to go to the team staff page of an idea and view all the resources using that role.

Staff Allocations

Staff allocation is the period during which a resource is booked to an idea. Unless you change the booking dates, staff members are automatically booked for the entire duration of the idea. The allocation amount granted for a resource can be calculated as follows:

    Total number of working days including the start and finish dates * Number
    of available hours per day

ETC is based on the number of hours a resource is assigned to the idea.

Edit Staff Allocations

Follow these steps:

1. Open the idea.

2. Click Team.

3. Edit the following fields:

   Role

   Select a role for this resource on the idea.

   Time

   Indicates that the resource can enter time taken for completing the work on the idea.

   Booking Status

   Select the booking status for the resource on the idea.

   % Allocation

   Enter the default amount for the resource allocated to the idea. You can enter "0" (zero) as the allocation percentage. The Allocation column reflects the changes done here.

4. Click Save.

Change Resource Default Allocation

Use the Planned Allocation and Hard Allocation sections on a resource Staff Member Properties page to indicate any deviations from the Default % Allocation field. You can unbook a hard-booked resource, or extend a resource for additional planning.

The Planned Allocation curve represents the default, or total allocation amount requested by the manager. The Hard Allocation curve represents the allocation amount that the resource manager commits. The booking status for a resource changes according to the allocation amounts in the planned and hard allocation curves.

For example, suppose the planned or default allocation is 100 percent for a resource. Suppose, a resource is booked to work on your idea from 8/01/11 through 11/30/11. But is also scheduled to work on another idea 50 percent of the time through September 1. And, in addition, plans to be on vacation from 9/15/11 through 9/22/11. In this case, you could create two allocation curves for the resource: One that indicates a 50 percent deviation from 8/01/11 through 9/01/11, and another that indicates a zero percent deviation from 9/15/11 to 9/22/11.

Follow these steps:

1. Open the idea.

2. Click Team.

3. Click the Properties icon for the resource to change allocation.

   The properties page appears.

   The page displays the basic profile fields and allocation-related fields.

4. In Default % Allocation, enter the percentage of time the resource requires to be allocated to the idea. You can enter 0 (zero).

   Note: The Allocation and Allocation % columns on the Idea: Team: Staff page reflects the changes, if any.

5. In the Planned Allocation and Hard Allocation sections, create a row each for deviation from the default allocation.

   To use the short example preceding the steps, create two rows: One to cover the period for the resource working at 50 percent (instead of the 100 percent default or planned allocation). Another, for the period that the resource actually works at 0 percent (instead of the 100 percent default or planned allocation).

6. To create a planned or hard allocation period:

   a. Enter or select a Start date for the period.

   b. Enter or select a Finish date for the period.

   c. Enter the percentage of time you expect them to work (as tentative or committed) in the % Allocation field. You can enter 0 (zero).

7. Click New Row to add another row and repeat Step 4.

8.   When you are done, click Save and Return.

How to Reset Staff Allocations

You can reset the staff allocations for an idea in the following ways:

■   Shift the allocation (see page 62) to shift or scale all or a portion of the resource allocations.

■   Set the allocation (see page 63) to update the allocation of multiple team members at the same time.

■   Commit the planned allocation (see page 64) to reset a resource hard allocation to be equal to the planned allocation.

■   Accept the hard allocation (see page 65) to reset a resource planned allocation to be equal to the hard-booked allocation.

Use the Actions menu on the team staff page and team detail pages of an idea for the preceding options.

Shift and Scale Resource Allocations on Ideas

Move resource allocations back and forward in time to shift or scale all or a portion of the resource allocations in an idea. As you move data, segmented allocation dates are kept intact, even when the percent allocated for each segment changes. Shifting allocations is useful for projecting allocations beyond the allowable time-scaled view, which can only extend for six months.

For example, consider an allocation that starts on May 1, continues at its default rate of 100 percent through the end of May. Then goes through June at the reduced allocation of 50 percent. Now, shift the allocation to start from June 1 to July 2 (for 31 calendar days) at 100 percent, and up to August 2 at 50 percent. You can also shift allocations for time spans that contain no segments.

Follow these steps:

1.   Open the idea.

2.   Click Team.

The staff list page appears.

3.   Select the check box next to the resource to shift allocation.

4.   From the Actions menu, click Shift Allocation.

The allocations page appears.

5.   In the Time Span to Shift section, click Select Date to change the start and finish dates for the resource allocated to the idea. Data shifts according to the dates you enter in the fields.

6. In the Time Shift Parameters section, do the following:

    ■   At Shift to Date, click Select Date to select a new beginning date for shifting the data. If the field is left empty, no shifting occurs.

    ■   At Shift Cut-Off Date, click Select Date to select the last date for shifting data. You cannot shift allocations beyond the date.

    ■   At Scale Allocation % By, enter the percentage change in the allocation for the shift. If the field is left empty, no scaling occurs.

7. Save the changes.

Set Allocations for Multiple Team Members

Set the allocations of multiple team members with one action simultaneously. Click More on the team staff page and team detail pages of an idea to use the Set Allocation option.

Follow these steps:

1. Open the idea.

2. Click Team.

    The staff list page appears.

3. Select the check box next to the resource to update allocation.

4. From the Actions menu on top right, click Set Allocation.

    The allocations page appears.

5. In the General section of the page, set the following allocations for the selected team members:

    Start Date

    Defines the date of starting work on the idea. Select the Reset to Match Investment Start Date check box to reset the resource staffing requirements on the idea to match the idea start date.

    Finish Date

    Defines the last date of working on the idea. Select the Reset to Match Investment Finish Date check box to reset the resource staffing requirements on the idea to match the idea finish date.

    Default % Allocation

    Defines the percentage of time for allocating the resource to the idea. You can enter 0 percent. The Allocation and Allocation % columns on the Idea Team: Staff page reflects the change.

Booking Status column

Displays the resource or role booking status.

Values

– Hard. The resource is committed to the idea.

– Soft. The resource is tentatively scheduled for the idea.

– Mixed. Both soft and hard allocation exists for the resource.

6. Click Save and Return.

Commit Resource Planned Allocation

Committing the planned allocation, equalizes the hard allocation to the planned allocation for the resource. Commit after editing the planned allocation segment for hard-booking the segments for a resource. A hard booking status for a resource signifies full commitment.

To use the Commit Planned Allocation option, click More on the Idea Team: Staff page and Idea Team: Detail pages and select the option.

Committing planned allocation does not reset the default allocation percentage. This action copies the planned allocation into the Hard Allocation section of the resource Staff Member Properties page.

Note: The Hard Allocation section displays on the page depending on your Mixed Booking settings. See your CA Clarity PPM administrator.

Follow these steps:

1. Open the idea.

2. Click Team.

   The staff list page appears.

3. Select the check box next to the resource to commit planned allocation.

4. From the Actions menu on top right, click Commit Planned Allocation.

   The confirmation page appears.

5. Click Yes.

Accept Resource Hard Allocation

Use the Accept Hard Allocation option to reset the planned allocation to equalize to the hard-booked allocation. If soft-booked planned segments displays in the Planned Allocation section, they are removed. All segments are then reset to equal the hard-booked segment.

Note: The Accept Hard Allocation option displays on the page depending on your Mixed Booking settings. See your CA Clarity PPM administrator.

Follow these steps:

1. Open the idea.

2. Click Team.

   The staff list page appears.

3. Select the check box next to the resource to accept hard allocation.

4. From the Actions menu on top right, click Accept Hard Allocation.

   The confirmation page appears.

5. Click Yes.

   This action sets the planned allocation to equal committed allocation. Accordingly, the % Allocation and Allocation column values change. The Booking Status value displays as "Hard" as the allocation is fully committed.

Edit Resource Allocations

The team detail page of an idea lists planned and committed allocation for an idea by resource by time period in a graph format. The view helps you determine if a resource is overbooked or under booked and by how much. You can also ascertain the availability of a resource for an idea.

To view the page, select Team, and then click Detail from the page toolbar.

The team detail page displays data based on resource, allocation, and time period. Scrolling over a time period displays a note providing you with a brief summary of what you see. The time period columns are, by default, set to weekly, and start with the current week. The allocation color code is as follows:

Yellow

Resource is allocated at or under availability for that time period.

Red

Resource is over-allocated (the amount of time booked exceeding availability) for that time period.

Green

Allocation to other investments, ideas, or services.

See the *CA Clarity Basics User Guide* for more information.

Staff Member Replacement

Replace a staff member assignment from the team staff page of an idea. Use the availability score to find a replacement at the team level.

In addition, you can replace a resource with a different named resource, and a role with a resource. During replacement, over-allocating the member replacing the previous member or members can occur.

Guidelines to Replace Staff Members

Consider the following before making a staff member replacement:

- Replacing a resource with a different resource, does not transfer the actuals and pending actuals (if any) of the original to the new staff member. Only the remaining ETC is transferred to the new staff member.

- The original staff member requires to complete time entries so that the actual data is posted before the replacement occurs.

- The role of the original staff member is transferred to the new staff member, unless you are replacing a role with a different role.

How Data Transfers From Replaced Staff Members

The following table identifies how data from the replaced staff member transfers to the new staff member:

Data Type	Transfers
Available Start	Yes, if this date has not passed and if new resource is not booked on that date.
Available Finish	Yes
Remaining Allocation	Yes
Percent (%) Allocation	Yes
Investment Role	Yes
Existing Actuals	No
Pending Actuals	No
Baselines	No

Replace Staff Members

Use the team staff page of an idea to replace staff members assigned to your idea. A list of resources displays the staff with the same role as the resource being replaced, and their availability during the idea time period. You can replace a resource using the staff or detail page.

Use the method to select a resource best suited in terms of availability for replacing the other. An availability score is automatically generated for each of the resources to which you have access. The score indicates the close match between the potentially replacing and the replaced resources. Availability is based on the duration of the assignment and the daily availability of the resource. Generally speaking, the higher the score, the closer the match.

See the *Project Management User Guide* for more information.

Use the replace resource page to replace staff members. The page lists all of the resources to which you have access.

The Availability field at the top right of the page identifies the assignment period. The page also displays the number of hours the replacing resource is allocated to your idea. Both the allocated dates and the hours are transferred to the new replacement.

The Availability Match column displays a score that factors in the work period and the availability of each resource. Suppose, you do not add any skill specifications to your search criteria. Then, the Total Match column value duplicates the Availability Match score, and renders the Skill Match column. If you search by skills criteria and availability criteria, the Total Match column displays an average of the two scores.

Note: The following message displays at the top of the screen:

> "Match scores can be inaccurate if availability dates do not fall into the following range: ddmmyy - ddmmyy."

This message appears when there is a discrepancy between the date range in the message and the dates in the Availability field. The Availability Match score can be inaccurate. For example, suppose the dates in the Availability field are 9/1/11 - 2/7/12, and the date range in the message is 9/7/11 - 9/7/12. A one-to-one comparison for any resource cannot be generated, lowering the overall availability match scores.

Follow these steps:

1. Open the idea.

2. Click Team.

    The staff list page appears.

3. Click the Resource Finder icon next to the resource.

    The resource finder page appears.

4. Enter filter criteria to find the replacement resource.

   The results are displayed.

5. Select the check box next to the resource and click Replace.

   The confirmation page appears.

6. Click Yes.

Change Staff Member Roles

You can change a staff member role on an idea-by-idea basis. The change does not affect the role identified for them in their resource profile. You can replace a role assignment from either the idea staff or detail page.

Follow these steps:

1. Open the idea.

2. Click Team.

   The staff list page appears.

3. Click the Properties icon for the resource to change the investment role.

   The properties page appears.

   The page displays the basic profile fields and allocations-related fields.

4. In the General section of the staff member properties page, select a role in the Investment Role field.

5. Save the changes.

Remove Staff Members

If the resource does not post actuals to the idea and has no submitted actuals pending, you can remove a staff member from your idea.

Note: Removing a staff member from your idea does not:

- Delete the resource from CA Clarity PPM
- Change the staff member status to inactive

Follow these steps:

1. Open the idea.

2. Click Team.

   The staff list page appears.

3. Select the check box next to the resource, and click Remove.

   The confirmation page appears.

4. Click Yes.

Approve Ideas

Only ideas with a status of "Submitted for Approval" can be approved.

Follow these steps:

1. Open Home, and from Demand Management, click Ideas.

   The list page appears.

2. Select the check box next to the idea, and click Approve.

OR

Follow these steps:

1. Open the idea.

   The properties page appears.

2. Select "Approved" from the Status drop-down.

3. Save the changes.

Reject Ideas

You can reject ideas from the list page or from the properties page of a specific idea. An idea can only be rejected if its status is "Submitted for Approval."

Follow these steps:

1. Open Home, and from Demand Management, click Ideas.

   The list page appears.

2. Select the check box next to the idea, and click Reject.

OR

Follow these steps:

1. Open the idea.

   The properties page appears.

2. Select "Rejected" from the Status drop-down.

3. Save the changes.

   The idea status is set to "Approved".

How to Convert Ideas into Investments

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

If you have defined a simple budget, the information you enter on the Idea Properties: Budget page supersedes that entered in the Estimated Costs and Benefits section of the Idea: Properties: Main - General page during the conversion process.

You can do the following:

- Convert the idea an investment type (such as application or product).

  See the *IT Service Management User Guide* for more information.

- Convert the idea into a project using a project template (see page 71).

- Use the idea to create multiple investments (see page 71).

Convert Ideas into Investments

Only an idea with an "Approved" status can be converted.

Follow these steps:

1. Open the idea.

2. Click Convert.

   The select investment type page appears.

   Note: The investment types listed on the page are based on your access rights. For example, suppose you have the right to create asset and application investment types. Then, "Asset" and "Application" appear as choices on the page.

3. Select the investment type to convert the idea.

4. Click Next.

   The create page appears.

   For example, for converting your idea into a service, the Create Service page appears.

   See the *IT Service Management User Guide* for more information.

5. Complete the fields on the page, and save.

Convert Ideas into Projects Using Project Templates

Converting an idea into a project using a project template, transfers certain properties, such as the budget data, to the idea. The properties so transferred to the idea supersedes the properties from the project template. Once you convert the idea into a project, you can modify the project properties.

Only an idea with an "Approved" status can be converted.

Follow these steps:

1. Open the idea.

2. Click Convert.

   The select investment type page appears.

3. Select Project from Template.

4. Click Next.

   The select template page appears.

5. Select the template.

6. Click Next.

   The create page appears.

7. Complete the fields on the page, and save.

   See the *Project Management User Guide* for more information.

Use Ideas to Create Multiple Investments

Follow these steps:

1. Open the idea.

2. Click Convert.

   The select investment type page appears.

3. Select the investment type to convert the idea and click Next.

   The create page appears.

4. Complete the fields on the page.

5. Save the changes.

   The properties page appears with the "Converted" status.

6. Repeat Step 3 through Step 6 for creating more investments.

Delete Ideas

You can delete any idea, including ideas converted to investments. Deleting an idea-converted-investment, the link from the converted investment to the idea is removed. Deleting an idea does not delete the converted investment.

Follow these steps:

1. On the Ideas list page, select the check box next to the idea.

2. Click Mark for Deletion.

   The idea is deleted and no longer displays in the list.

Appendix A: Access Rights

This section contains the following topics:

Idea Access Rights

The following access rights are required to work with ideas:

Idea - Approve - All

Lets you approve all ideas.

Type: Global

Idea - Approve

Allows user to approve a specific idea.

Type: Instance

Ideas - Create

Lets you create instances of the idea object. The right includes the Ideas - Navigate access.

Type: Global

Idea - Edit - All

Lets you edit all ideas. The access right includes the Idea - View access and the ability to delete all ideas.

Type: Global

Idea - Edit

Allows user to edit a specific idea. The access right includes the *Idea - View* access right and the ability to delete a specific idea. The right does not include the *Ideas - Navigate* access right.

Type: Instance

Idea - Edit Access Rights - All

Lets you edit the access rights for all ideas. The right does not include the Ideas - Navigate or Idea - View access.

Type: Global

Idea - Edit Access Rights

Allows user to edit the access rights for a specific idea. The right does not include the *Ideas - Navigate* or *Idea - View* access rights

Type: Instance

Idea - Hierarchy - Parents - Add - All

Lets you add investments to the Parent Hierarchy for any idea.

Type: Global

Idea - Hierarchy - Parents - Add

Allows users to add investments to the Parent Hierarchy for a specific idea.

Type: Instance

Idea - Hierarchy - Parents - Edit - All

Lets you edit investments in the Parent Hierarchy for any idea.

Type: Global

Idea - Hierarchy - Parents - Edit

Allows users to edit investments in the Parent Hierarchy for a specific idea.

Type: Instance

Idea - Hierarchy - Parents - View - All

Lets you view investments in the Parent Hierarchy for any idea.

Type: Global

Idea - Hierarchy - Parents - View

Allows user to view investments in the Parent Hierarchy for a specific idea.

Type: Instance

Idea - Initiator (Auto)

The right is automatically granted to the initiator of the idea.

Type: Instance

Idea - Manager (Auto)

The right is automatically granted to the manager of the idea. The right includes the *Idea - Hierarchy - Parents - View* access right. Users with the right can edit existing staff allocations.

Type: Instance

Ideas - Navigate

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

Type: Global

Idea - View

Allows user to view a specific idea. The right does not include the *Ideas - Navigate* access right.

Type: Instance

Idea - View - All

Lets you view all ideas. The right includes the Ideas - Navigate access.

Type: Global

Idea - Hierarchy - Parents - View - All

Lets you view investments in the Parent Hierarchy for any idea.

Type: Global

Idea - Hierarchy - Parents - View

Allows user to view investments in the Parent Hierarchy for a specific idea.

Type: Instance

Idea - View - All

Lets you view all ideas. The right includes the Ideas - Navigate access.

Type: Global

Idea - View

Allows user to view a specific idea. The right does not include the *Ideas - Navigate* access right.

Type: Instance

Ideas - Create

Lets you create instances of the idea object. The right includes the Ideas - Navigate access.

Type: Global

Ideas - Navigate

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

Type: Global

Resource Access Right for Ideas

The following resource rights are also available when managing ideas:

Resource - Approve Ideas

Allows the user to approve Ideas for a specific Resource. Includes the *Resource - Edit Ideas* access right.

Type: Instance

Resource - Approve Ideas - All

Lets the user approve Ideas for all Resources. Includes the *Resource - Edit Ideas - All* access right.

Type: Global

Resource - Edit Ideas

Allows the user to edit and delete ideas for a specific Resource. Includes the *Resource - View Ideas* access right but not the *Ideas - Navigate* access right.

Type: Instance

Resource - Edit Ideas - All

Allows the user to edit and delete ideas for all resources and the *Resource - View Ideas - All* access right.

Type: Global

Resource - Enter Time

The right allows the user to complete, submit, and reject timesheets for a resource. The Timesheets link appears on the Personal page.

Type: Instance

Resource - Self (Auto)

The right is automatically granted to the resource and includes the *Resource - Edit Ideas* access right.

Type: Instance

Resource - View Ideas

Allows the user to view ideas for a specific resource. Includes the ability to delete Ideas, but does not include the *Ideas - Navigate* access right.

Type: Instance

Resource - View Ideas - All

Allows the user to view ideas for all resources. Includes the ability to delete ideas and the *Ideas - Navigate* access right.

Type: Global

Incident Access Rights

Incidents are typically short-lived. You can have many incidents at any given time. The access rights to incidents are governed from incident categories. You can see only the incidents mapped to categories to which you have access rights. Your CA Clarity PPM administrator can assign access rights to incidents, or the Incident Manager can assign access rights within the incident instance.

The following access rights are required to work with incidents and incident categories:

Incidents - Access

Allows the user to access the incident pages.

Type: Global

Incidents - Administrate

Allows the user to access the incident administration pages, and administer the category-investment mapping, category-group mapping, and priority setup.

Type: Global

Incidents - Create

Allows the user to create and edit incidents, giving limited access to the incident properties. Includes the *Incidents - Access* access right.

Type: Global

Incident - Create/Edit

Allows the user to create new incidents and edit a specific incident.

Type: Instance

Incidents - Create/Edit - All

Allows the user to create and edit incidents on the incident pages. Includes the *Incidents - Access* and *Incidents - Select Category - All* access rights.

Type: Global

Incidents - Manage Category Incidents

Allows the user to manage incidents mapped to a specific category. Includes the *Incidents - Select Category* access right.

Type: Instance

Incidents - Override Priority

Allows the user to override the priority of the incident to which the user has access. Resources with the access right can view the Override Priority field on the Incident Properties page.

Type: Global

Incidents - Select Category

Allows a resource to select a specific incident category.

Type: Instance

Incidents - Select Category - All

Allows the user to select all categories on the incident pages. Includes the *Incidents - Access* access right.

Type: Global

Incident Resource Roles

No default incident-specific roles exist. You can add the appropriate roles to work with incidents based on the instance and global access rights provided. For example, you can set up the following roles to work with incidents:

Role	Role Description	Access Right
IT Administrator	Assign this role to resources responsible for setting up, administering, and mapping incident categories and financial settings for incidents from the Administration menu. Resources with this role are also responsible for assigning investments to incident categories. IT administrators determine which resources need incident access rights and the incident access rights that requires to be granted to the resources.	Incidents - Administrate; Administration - Access
IT Manager	Assign this role to resources responsible for assigning incidents. With this role, a resource can view new incidents, assign them to IT workers, and when necessary, reassign unresolved incidents to another resource or group.	Incidents - Create/Edit - All

Role	Role Description	Access Right
IT Worker	Assign this role to resources responsible for working on and resolving incidents. With this role, a resource can create, view and assign appropriately all incidents within a specific set of incident categories. The default page that appears for an IT worker is Assigned to Me. This page displays those incidents that have been assigned to the IT worker. When an incident requires converting into a project or a project task, the IT worker flags the incident for conversion.	Incidents - Manage Category Incidents
Requestor	Assign this role to resources responsible for logging new incidents. With this role, a resource can view a prioritized work queue and record information about the nature of work performed against the reported incident. Those incidents logged by a requestor are displayed on the Reported by Me page. When a requestor is assigned to an incident, the Assigned to Me page appears and displays a list of those incidents. Requestors have a limited view of the incident properties. They can view the incident public notes, tracking ID, short description, detailed description, type, and category.	Incidents - Create; either Incidents - Select Category - All or, Incidents - Select Category for at least one incident category

Idea Resource Roles

No idea-specific roles exist in CA Clarity PPM. You can add the appropriate roles to work with ideas based on the instance and global access rights provided. For example, you can set up the following roles to work with ideas:

Manager

The idea manager has implicit access rights to the ideas created.

Approver

The approver of the idea has access to approve or reject ideas, or to set ideas as incomplete.