

# CA Clarity™ PPM

## Demand Management User Guide

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# Chapter 1: How to Get Started with Demand Management

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This section contains the following topics:

[Demand Management](#) (see page 7)

[Demand Management Prerequisites](#) (see page 8)

[Configure Incident Categories](#) (see page 9)

[Demand Management Troubleshooting](#) (see page 11)

## Demand Management

As a CA Clarity PPM administrator, use the information in this article to configure the Demand Management features. Demand Management provides a means to capture, classify, evaluate, and resolve all sources of demand. Demand on an IT organization can take any of the following forms.

- a project request
- a service request
- a support request
- an incident, issue, or problem
- an idea for a new product, service, or strategic initiative

CA Clarity PPM recognizes two primary components for Demand Management: ideas and incidents.

Your IT managers, analysts, and users can use CA Clarity PPM to capture all idea and incident demand in one of two environments. You can use CA Clarity PPM forms to capture information about an idea, project request, or incident. You can also integrate data with other systems that capture help desk tickets, incidents, and service requests. CA Clarity PPM forms are often not the primary data source for incidents. In integrated environments, incidents that are imported typically include incomplete investment data. The incidents can have individual effort entries that are not associated with an investment. In this case, use CA Clarity PPM to assign a single investment to all such effort entries.

These integrations are supported through the XML Open Gateway (XOG). You can use the XML Open Gateway to capture incidents from other systems and bring them into CA Clarity PPM.

## Demand Management Prerequisites

Before managing demand in CA Clarity PPM, complete the following checklist:

- Verify that the Demand Management module is installed and that you have a valid license for it.
- Consult the *Access Rights Reference Guide* and verify that each user has the appropriate access rights for ideas or incidents. At minimum, verify that you have assigned one or both of the following global access rights to each user who plans to use Demand Management:

### **Incidents - Access**

Allows the user to access the incident pages.

### **Ideas - Navigate**

Lets the user navigate to the Ideas pages and view the Ideas link.

**Note:** Users can confirm their access rights by logging in and selecting Ideas or Incidents from the Demand Management menu.

- To enable users to create incidents, assign them access rights for at least one incident category:
  - Incidents - Create
  - Incidents - Select Category
- To enable users to view or edit financial plan data, assign them one or more of the following access rights for ideas:
  - Idea - Financial Plan - Submit All for Approval
  - Idea - View Financial Information All
  - Idea - Benefit Plan - Edit All
  - Idea - Benefit Plan - View All
  - Idea - Budget Plan - Approve All
  - Idea - Budget Plan - Edit All
  - Idea - Budget Plan - View All
  - Idea - Cost Plan - Edit All
  - Idea - Cost Plan - View All

- Verify that the following jobs for incidents are scheduled to run:
  - Post Incident Financials job
  - Post Incident Effort Chargebacks job
- Configure a currency and a cost/rate matrix. Before a resource can enter financial data for incidents, create as many cost matrices as needed for each entity. Define the general properties and then assign columns to the matrix. For more information, see the *Financial Management User Guide*.
- Complete the steps in the following procedure: [Configure Incident Categories](#) (see page 9).

## Configure Incident Categories

Before resources can log incidents, create logical groups of investments named *incident categories*. Incident categories help classify incidents of a particular type. Configure logical groupings of incidents that reflect your organization structure. Then create and associate investments with these incident categories.

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. 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.

As an administrator, define the incident category properties, associate your investments with incident categories, and grant resources, groups, and OBS units access to the incident category.

### **Follow these steps:**

1. Open Administration, and from Data Administration, click Incidents.  
The setup page appears.

2. Click New and complete the following fields:

**Category Name**

Defines the short name for a related group of incidents. Examples include *2016 New System, Mobile Devices, or Access Issues*.

**Category ID**

Defines the unique identifier for the incident category.

**Description**

Describes this category of incidents.

3. Click Save.
4. Repeat these steps to create a catalog of your investments including assets, applications, products, services, and other work.
5. Click the Associated Investments tab.
6. Click Browse and select the check box next to one or more investments to associate them with an incident category.

7. Click Add.

The investments are assigned to the incident category.

8. Click Save.

9. Click the Access to this Category tab and select one of the following menu options:

**Full View**

Displays a list of all entities (resources, groups, and OBS units) with access to the incident category. You can click an entity to view its access rights for the previously select incident 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.

10. If you selected Full View, on the Full Access View page, select an entity (resource, group, or OBS unit) and click Continue.

11. Click Add, select the check box next to each access right, and click Add and Continue.

12. 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.

13. Click Return and Exit when finished. Repeat these steps to configure access to each category.

14. Click the Priority Setup tab.

15. Select the incident priority for a given impact and urgency combination. The product uses your incident priority matrix to escalate incidents based on impact and urgency.

**Note:** 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.

16. Click Save.

**Note:** To assign investments only to specific incidents, click Assign Investment, specify your filter criteria, and click Apply.

## Demand Management Troubleshooting

### Incident Management: Check for Processing Errors

Use this procedure to check for incident management errors.

**Follow these steps:**

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

The setup page appears.

2. Click Processing Errors.

3. Enter your filter criteria and click Filter, or click Show All.

## Incident Management Error ITL-0514: Incident Category Must Be Created Before Instance Can Be Created

### **Symptom:**

When I try to access incidents for the first-time, I get the following CA Clarity PPM error message:

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

### **Solution:**

As an IT worker or any user with access rights, you can log a new incident. You can view and edit the incidents that you have created in the Reported by Me menu. IT workers can view a list of all incidents in their assigned incident category from the Assigned to Me menu.

As an administrator, set up the incident category mapping before these users attempt to report and manage incidents. Complete the steps in [Configure Incident Categories](#) (see page 9).

## Idea Management Message: Match Scores Can Be Inaccurate

### **Symptom:**

I am using the Replace Resource page to replace staff members. The page lists all of the resources that I can access. When I use the team staff page of an idea to replace the assigned staff members, I get the following error message:

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

**Solution:**

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 9/30/2015 - 2/27/2016, and the date range in the message is 10/20/2015 - 10/20/2016. A one-to-one comparison for any resource cannot be generated, lowering the overall availability match scores.

**Follow these steps:**

1. As an administrator, adjust the dates in the daily resource allocation Time Slice Properties.

**Note:** Changes to the From Date and Number of Periods can also affect the time slicing jobs, datamart extraction jobs, portlets, and reports.

2. As a resource manager or IT worker, open the idea and complete the remaining steps.
3. Click Team.

The staff list page appears. Use the team staff page of an idea to replace the staff members assigned to it.

4. Click the Resource Finder icon for a Resource/Role entry.

A list of resources with the same role as the resource being replaced appears and shows their availability during the idea time period.

- The Availability field at the top right of the page identifies the assignment period. The page also displays the number of hours the resource is allocated to the 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. Availability is based on the duration of the assignment and the daily availability of the resource. The higher the score, the closer the match.
5. Enter filter criteria to find the replacement resource.
    - You are not required to add any skill specifications to your search criteria. In this case, 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.
    - The product uses the resource allocation data to find resources that match the criteria. The dates that appear in this message come from the Time Slice definition DAILYRESOURCEALLOCCURVE (Slice ID=10). The date range is determined by using the current From Date and the number of periods defined in the time slice.

6. Select the check box next to the resource and click Replace.  
The Booking Confirmation page appears.
7. Click Yes.

# Chapter 2: How to Manage Incidents

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This section contains the following topics:

[Incident Management](#) (see page 15)

[Create an Incident or Service Request](#) (see page 16)

[View a List of Incidents](#) (see page 20)

[View a List of Your Incident Notifications](#) (see page 21)

[Update the Incident Status](#) (see page 22)

[Assign or Reassign Resources to Incidents](#) (see page 23)

[View or Add Incident Notes](#) (see page 24)

[Enter the Time Spent Resolving Incidents](#) (see page 25)

[Convert Unplanned Incidents into Planned Project Work](#) (see page 26)

[Manage Automated Incident Processes](#) (see page 29)

## Incident Management

As an information technology (IT) analyst or manager, use this article to learn more about managing IT demand in the form of incidents in CA Clarity PPM.

IT organizations want to manage both the demand for services and supply of resources to fulfill incidents and other service requests. Management wants to satisfy the growing needs of its consumers, internal business units, vendors, partners, and other users.

Incidents represent events that do 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, software, service, and support requests. An IT service request is a type of incident from a user for support, delivery information, access, or documentation. CA Clarity PPM captures information about incidents and service requests from users. The application can then help achieve the following goals:

- Assign the resources that are required to resolve the issue
- Record the exchange of comments between analysts and users
- Identify the resolution
- Track the time that was spent

This information represents key operations and performance data for an IT department. Without incident management, users can experience unnecessary extended interruptions resulting in increased costs to the organization.

Unplanned work includes incidents, ideas, or requests for enhancements that consume resources on a daily basis. The combination of unplanned work and planned project work represents the total IT demand. In addition to planned work, use CA Clarity PPM to assess the cost of unplanned work resulting from incidents, and to monitor your resource utilization.

As an IT service manager or analyst, use CA Clarity PPM to capture, prioritize, manage, and resolve unplanned demand from incidents. Users can 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.

**Note:** 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 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.

## Create an Incident or Service Request

To report a new IT event, issue, or work request, create an incident.

**Follow these steps:**

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

**Note:** You can also create an incident when viewing an investment.

2. Click New.
3. Complete the fields in the General section:

**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.

**Note:** You can change the incident category for an incident at any time.

**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
- 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. An incident priority helps IT managers determine the plan in resolving incidents.

The priority of an incident is a function of its impact and urgency. As an administrator, configure the impact and urgency values *for all incidents* in the incident priority matrix. As an IT analyst, modify the priority *for a single incident* by altering the values in 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.

### 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.

### 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 Primary Contact section:

**Name**

Specifies the contact person for this incident. By default, it is the resource who is currently logged in.

5. Save the changes.

## View a List of Incidents

Use this procedure to generate a list of incidents. You can view important details such as the description, category, status, urgency, and impact.

**Follow these steps:**

1. Open Home and from Demand Management click Incidents.

The list page appears.

2. Select one of the following viewing options:

**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.

**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.

**Associations**

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

**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 set the incident urgency to *High* and to implement the incident.

Your 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.

### **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.

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.

## View a List of Your Incident Notifications

As an IT analyst, you can receive notifications when an IT manager assigns you work on an incident. The method of receiving notifications depends on the assigned user personal notification settings.

### **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.

## Update the Incident Status

Users and processes can change the status of a new incident over time. Use the following procedure to view and to edit the status of an incident. While it is open you can edit additional properties 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 to open the incident.

The properties page appears.

3. Select a value in the Status field:

**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; however, the IT worker is waiting for 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.

4. Click Save.

## Assign or Reassign Resources to Incidents

Verify that all incidents are assigned to a resource. 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.

**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 in the Assigned To field.
4. Enter filter criteria and click Filter or click Show All.
5. Select a resource and click Add.  
The selected resource is assigned to the incident.
6. Save the changes.
7. To reassign, perform these steps again and select a different resource or continue to the next step.
8. Select the check box next to the incident you want to reassign. You can reassign incidents that are unresolved to another IT resource.
9. Click Reassign.
10. Enter filter criteria and click Filter or click Show All.
11. Select a resource and click Reassign.  
The confirmation page appears.
12. Click Reassign.

## View or Add Incident Notes

Use the incident notes page to view or to add private and public notes. Notes record additional information about an incident. All the notes appear in chronological order. You can 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.

**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 the Notes tab and enter a subject and description.
4. Select the Internal check box to make this note private and viewable only to the IT worker adding the note. When the requestor or other IT staff members view notes, they will only see public notes.
5. Click Add.  
The new note appears in the list.
6. Click the note subject to open the note. Click Return to close the note.
7. Click a column header to sort the list.
8. Click Return.

## Enter the Time Spent Resolving Incidents

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

- Use the incident effort page to display a chronological list of the timesheet entries you recorded for this incident. The incident effort is used to calculate costs for unplanned work.
- Link directly to your timesheet to record the time you spend working on any of your assigned 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.

The properties page appears.

3. Click Enter Time.

The Select Investment and Time Period page appears.

4. Complete the following fields:

#### **At Investment**

Specifies the investment to charge for the resulting cost. The investments that you can select are based on the following criteria:

- The associated incident category of the incident.
- 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.

## Convert Unplanned Incidents into Planned Project Work

Incident scope can reach a point that requires management as a project or project task. The IT worker assigned to the incident flags the incident for conversion and assigns it to a project manager. Depending on the personal notification settings of the project manager, a notification to convert the incident to a project or task is sent.

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.

**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. You can close the incident.
6. As the project manager who is assigned to the incident, convert the incident into a project or project task:
  - a. [Convert Incidents into Projects](#) (see page 26).
  - b. [Convert Incidents into Project Tasks](#) (see page 27).
7. 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.

**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. To convert the incident into a new project, select Project.
5. (Optional) To convert the incident into a new project based on a project template, select Project from Template and click Next. Select a project template.

6. 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 the project page.

7. Complete the remaining fields on the page.

For more information, see the *Project Management User Guide*.

8. 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.

For more information, see the *Project Management User Guide*.

7. Save the changes.

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

## Conversion Mapping from Incidents to Projects or Tasks

When you convert an incident to a project or a project task, some data is carried forward with the incident to the new project. The following table shows how the data maps when converted:

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)

The following exceptions apply:

- Effort data is not carried forward to the project or project task during conversion. 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.
- Any custom attributes on the Incident object do not convert to identical custom attributes on the project or task.
- If the contact or assigned resource is not a team member of the project, data does not carry forward.
- 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.

## Manage Automated Incident Processes

You can create automated incident processes and track their progress. As a process administrator, activate the [Assign Incidents approval process](#) (see page 30) to manage the assignment, review, and completion of incidents. When a user logs a new incident, the process starts automatically. You can customize the process with your own business rules.

### 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. Click the Processes tab again and select one of the following menu options:
  - Click *Available* to view processes that are already created for the incident.
  - Click *Initiated* to view processes that have already started.
5. Select the check box for an available process and click Start to initiate it.  
**Note:** An instance of the Assign Incidents process is created automatically each time an incident is submitted for approval.
6. When the IT analyst fixes the issue, open the incident and change the status to *Resolved*.  
**Note:** 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.
7. Enter a date in the Resolved Date field.
8. When the original requestor has accepted the resolution for the incident, change the status of the incident to *Closed*.  
**Note:** Setting the status of an incident to *Closed* when the Assign Incidents process is active and running triggers a notification. The notification informs the requestor that the incident is closed. The automated process does not change the status of an incident to *Closed*.
9. The Assign Incident process terminates when the *Resolution Verification* step is complete and the incident is resolved.



### **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.



# Chapter 3: How to Manage Ideas

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This section contains the following topics:

[Idea Management](#) (see page 33)

[The Idea Approval Process](#) (see page 34)

[Convert an Idea into an Investment](#) (see page 49)

[Associate Ideas with Parent Investments](#) (see page 53)

[Staff a Team to Work on an Idea](#) (see page 54)

## Idea Management

As an IT analyst or manager, use this article to learn more about managing future IT demand as ideas in CA Clarity PPM.

Ideas are the initial stage in the creation of 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. Develop and approve the best ideas and reject unwanted ideas before they become high risk investments that consume resources. You can track ideas and convert them into investment opportunities. For example, you can evaluate an idea, decide that it holds sufficient merit, and convert it to any of the following:

- projects
- products
- services
- assets
- applications
- investments
- other work

These investment opportunities can then be approved as part of your portfolio. You can include ideas in an investment hierarchy, build a team and budget around them, and set up reports for ideas. Use the audit trail 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. The Audit page appears when you open an idea. Use this page to view a log of changes, additions, or deleted records for the fields chosen for auditing.

The system of record for ideas is often not CA Clarity PPM. You can import ideas from another system of record using the XML Open Gateway and then manage them in CA Clarity PPM. After you import them, the ideas are part of the portfolio management process.

## The Idea Approval Process

The *Idea Approval* process is an out-of-the-box CA Clarity PPM idea management process. As a process administrator or manager, the idea approval process helps you to manage the submission, review, approval, and rejection of ideas. By default, this process is not active. The CA Clarity PPM process administrator activates it before the idea approval process can be started. You can customize a process using additional business rules.

**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.

Automated idea processes move the idea through a workflow. The following steps summarize the process:

1. An instance of Idea Approval process is created automatically each time a user creates an idea. A new idea has an *Unapproved* status.
2. The approval process sends notifications for each action item or step to designated recipients. The process locks the idea status for the duration of the approval process and does not allow anyone to change the idea status manually.
3. When a user submits a proposed idea for approval, and all required information is complete, the idea status changes to *Submitted for Approval*.
4. An action item is sent to each reviewer that has the right to approve the idea. The action item requests that the approver review and approve the idea.
5. The reviewer examines the idea. The idea can be *approved*, *rejected*, or set to *incomplete* to request additional information from the original person making the request.
6. Incomplete ideas can be resubmitted. When a user resubmits an idea, its status is set to *Submitted* and it returns to the start of the process.
7. When an idea is approved, you can convert it into any project, service, or investment to which you have the rights to create.
8. Another action item notification is sent to the original author of the idea when it is approved or rejected.
9. The process terminates only when you approve, reject, or delete the idea.

**Note:** As multiple users can have the right to approve the idea, contradictory responses could get recorded. For example, one reviewer approves the idea and another rejects 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.

## Create an Idea

Use the create idea page to define the properties, estimated costs and benefits, and detailed description of an idea.

**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 General section:

**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**

Specifies the functionality and value to users of implementing 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 idea to allow resources to view the idea in any capacity planning portlet.

**Default:** Selected

**General Notes**

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

4. Complete the Estimated Costs and Benefits section:

**Note:** Some of the properties are used later in the approval process 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**

Describes the business advantages of developing this idea.

**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. Click the Browse icon in the Organizational Breakdown Structure section next to the OBS to associate with the idea for security, organizational, and reporting purposes. The OBS-named-Department is used to associate the idea with a CA Clarity PPM department. If multiple OBS entries exist, the OBS-named-Department is listed last.

7. To save the idea, click Save.

The new idea appears on the Ideas page with an *Unapproved* status.

8. To save the new idea and submit it for approval, click Submit for Approval.

The new idea appears on the Ideas page with a *Submitted for Approval* status.

## Update Idea Properties

To define the idea, update its properties as information becomes available.

**Note:** Some of the properties are used later in the approval process when you convert the idea into a project, service, or investment.

**Follow these steps:**

1. Open Home, and from Demand Management, click Ideas.
2. Open an idea.
3. Click the Properties tab and select a menu item to update idea properties.
4. Edit general information, such as name, manager, goals, status, alignment, and OBS associations.
5. Select a resource in the Target Manager field.

**Note:** The target manager is the resource who manages the idea when it is converted into a project, service, or investment. Complete the field before you convert the idea into a project, service, or investment. If you leave this field empty, the resource you select as the Idea Manager becomes the manager for the project, service, or investment.

6. Complete the fields in the Detailed Description section of the properties page.
  - a. Specify the impact the idea has on existing initiatives.
  - b. Indicate the risks of the idea.
  - c. Specify any dependencies the idea has on existing initiatives.

7. [Define Scheduling Information](#) (see page 39) such as start and finish dates, and tracking methods.
8. [Define Budget Information](#) (see page 40) such as planned cost and benefit, NPV, and breakeven metrics.

An overview of the estimated costs and benefits appears in the Estimated Costs and Benefits section of the properties page.

## Define Scheduling Information

Use this procedure to define the idea start and finish dates, open the idea for time entry, and define its charge code.

**Follow these steps:**

1. Open Home, and from Demand Management, click Ideas.
2. Open an idea.
3. Click the Properties tab and click Schedule.

The schedule page appears.

4. In the Schedule section of the page, complete the following fields:

**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

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.

For more information, see the *Basics User Guide*.

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

## Define Budget Information

To evaluate ideas for portfolio management, define the planned cost and benefit information for each idea. 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. You can also elect to have the application calculate budget metrics for you automatically using the cost of capital.

Use the fields on the page to set the start and end dates for the budget. 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 Financial Summary.
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:

**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.

## Financial Plans for Ideas

You can create and manage the following types of financial plans for an idea to track its costs:

- cost plans
- benefit plans
- budget plans

Submit cost plans for approval like any other type of investment. After approval, the cost plan becomes the current budget plan. You can also associate a benefit plan with a cost plan or a budget plan. After you create a financial plan, you can include it in administrative processes or XML Open Gateway (XOG) transactions.

**Note:** The actuals in the financial plans, manual transactions, and the chargebacks are not financially enabled.

The following limitations exist for a financial plan on an idea:

- Actuals using transactions are not possible.
- Only a manually created cost plan (plan of record) can be converted to a target investment. A cost plan that you create using the methods Populated from Investment Team or Task Assignment is not converted.
- A budget plan cannot be converted to a target investment.
- A workflow system action is not available to convert an idea financial plan to a target investment. An idea financial plan can only be converted through the user interface.

## Create a Cost Plan for an Idea

You can create a cost plan for an idea. Cost plans can go through an approval process to become a formal budget plan.

**Follow these steps:**

1. Open Home, and from Demand Management, click Ideas.
2. Open an idea.
3. Click the Financial Plans tab.
4. If you see the following error, click the Properties tab, assign a Department OBS, and click Save.

You must associate this investment with an entity before a financial plan can be set up.

Click the Financial Plans menu and select Cost Plans.

5. Click New Manual Plan.
6. Complete the required fields.
7. To link the cost plan to a benefit plan, click Browse in the Benefit Plan field and select a plan.
8. Click Save.
9. Click the Detail tab.
10. Click Add to list the cost types and transaction classes for your plan. For example, you can add operating costs for hardware.
11. Click Save and Return.
12. On the Cost Plan Details page for an idea, click in the cells under Amounts By Period.
13. Add costs and units for each transaction class.
14. (Optional) To insert costs from an existing investment team, click the Actions menu and select Populate from Investment Team.
15. Click Save.

## Create a Benefit Plan for an Idea

To calculate ROI or NPV on an idea, create a benefit plan and associate it with a cost plan. You do not need approval for benefit plans.

**Follow these steps:**

1. Open Home, and from Demand Management, click Ideas.
2. Open an idea.
3. Click the Financial Plans tab.
4. If you see the following error, click the Properties tab, assign a Department OBS, and click Save.

You must associate this investment with an entity before a financial plan can be set up.

Click the Financial Plans menu and select Benefit Plans.

5. Click New.
6. Complete the required fields.
7. To link the cost plan to a benefit plan, click Browse in the Benefit Plan field and select a plan.
8. Click Save.
9. Click the Detail tab.
10. Click Add to list the benefits by description, class, and subclass for your plan. For example, you can list programs to increase revenue or reduce cost.
11. Click Save and Return.
12. On the Benefit Plan Details page for an idea, click in the cells under Amounts By Period.
13. Add costs for each benefit class by time period.
14. Click Save.

## Create a Budget Plan for an Idea

When a cost plan is approved, it becomes the budget plan for an investment.

**Follow these steps:**

1. Open an idea.
2. Click the Financial Plans menu and select Cost Plans.
3. Open a cost plan.
4. From the Actions menu click Submit for Approval.  
The cost plan becomes the proposed submitted budget plan.
5. Click the Financial Plans menu and select Budget Plans.
6. Click Approve.  
The cost plan becomes the approved budget plan.

## Submit an Idea for Approval

After you develop a new idea, submit it for approval. You can also submit an idea for approval while still creating it.

**Follow these steps:**

1. Open Home, and from Demand Management, click Ideas.
2. Open an idea.
3. Do one of the following:
  - Click the Submit for Approval button.
  - Change the Status field to *Submitted for Approval* and click Save and Return.

## Approve an Idea

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

**Follow these steps:**

1. Open Home, and from Demand Management, click Ideas.
2. Select the check box next to the idea.
3. Click Approve.

**Note:** You can also open the idea, select *Approved* from the Status drop-down list, and save your changes.

## Request More Information About an Idea

Use this procedure if you believe an idea requires additional information before approval and conversion into a project, service, or investment.

**Follow these steps:**

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

**Note:** You can also achieve these goals using a process.

## Reject an Idea

You can reject an idea from the list page or from its properties page. 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.
3. Click Reject.

**Note:** You can also open the idea, select *Rejected* from the Status drop-down list, and save your changes.

## Deactivate an Idea

Deactivate an idea when you want to put it on hold indefinitely.

**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.

## Delete an Idea

You can delete an idea, including an idea that has been converted to an investment. Deleting a converted idea removes the link to the investment. 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.

## Convert an Idea into an Investment

You can convert an *approved* idea into one or more of the following investment types:

- project
- application
- asset
- product
- other work
- service

**Follow these steps:**

1. Open an approved idea.

2. Click Convert.

The select investment type page appears.

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

3. Select an investment type.

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

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

5. Click Next.

The create page appears.

For example, for converting your idea into a service, the Create Service page appears. For conversions to a project from a template, select a project template.

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

## Copying Financial Information

When you convert an idea into an investment, the *Copy Financial Properties and Financial Plans* option appears on the Select Investment Type page. When you select this option, the product copies the following items to the target investment:

- The manually created cost plan (plan of record)
- A benefit plan (if you associated one with your cost plan)

Whether you select or clear this option, the following items are never copied:

- Cost plans that were created through the object actions
- Cost plans that are not designated as the plan of record
- Benefit plans that are not associated with the plan of record
- Budget plans
- Team information

The following examples explain what is copied from the idea to the investment when you select or clear the *Copy Financial Properties and Financial Plans* option. In the examples, the Department OBS for the original idea is DEPT1 of entity ENTITY1.

### Example 1: Associate both the idea and the investment with the same OBS.

#### Selected

All the financial attributes, Department OBS, and the financial plans are copied from the idea to the target investment. The Simple Budget page on the target investment becomes read-only.

#### Cleared

The Department OBS attribute on the Idea Properties page and only the Department attribute on the financial subpage are copied to the target investment. However, the financial plans are not copied. The Simple Budget page on the target investment can be edited.

### Example 2: Associate both the idea and the investment with the same parent OBS.

In this example, we associate the idea with one unit (DEPT1) of that OBS. We associate the Department OBS field on the target investment create page with another unit (DEPT2) of the same OBS.

#### Selected

All the attributes on the financial subpage and the financial plans from the idea are copied to the target investment. The Department OBS of the target investment changes to the new value (DEPT2) that you assigned after conversion. The Department field on the Financial Properties subpage displays the new value. The Simple Budget page on the target investment becomes read-only.

**Cleared**

The financial plans are not copied to the target investment. However, the Department OBS and the Department field on the financial subpage change to the new value (DEPT2). The Simple Budget page on the target investment can be edited.

**Example 3: Associate the idea and the investment with more than one OBS of different entities.**

**Selected**

The financial plans from the idea are not copied to the target investment. The Department OBS and the Department field on the financial subpage change to DEPT3. The Location field is blank. All the other attributes of the financial subpage are copied to the target investment as is, except Department. The Simple Budget page on the target investment becomes read-only.

**Cleared**

The financial plans and the financial subpage attributes are not copied to the target investment. However, the Department OBS and the Department field on the financial subpage change to DEPT3. The Simple Budget page on the target investment can be edited.

**Example 4: Associate the idea with an OBS and the investment with another OBS.**

**Selected**

All the financial attributes including the Department OBS and the financial plans (only the cost plan POR and the benefit plan that is linked to it) are copied to the target investment. The Department OBS field on the target investment is blank after saving as the target investment object, is not associated with that OBS. The Simple Budget page on the target investment becomes read-only.

**Cleared**

The Department OBS attribute on the Idea Properties page and the Department attribute on the financial subpage are copied to the target investment. However, the financial plans are not copied. The Department OBS field on the target investment is blank after saving as the target investment object, is not associated with that OBS. The Simple Budget page on the target investment can be edited.

## Associate Ideas with Parent Investments

You can associate an idea with one or more investments and services. View the parent assignments in a list that includes their percentages. The total percentage of your idea-to-investment allocations is required to equal 100 percent.

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. All cost information in the parent idea hierarchy is based on the assignment percentages.

Aggregate idea costs to parent investments. 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.

**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.
4. Click Add to add parent investments.
5. Click Remove to remove parent investments.
6. Click in the Allocation field of each parent and enter the association percentage for the idea.
7. Click Save.

**Note:** You can also add or remove associations on one of the parent investment-related set allocations pages.

## Staff a Team to Work on an Idea

To start capacity and portfolio planning, staff your most promising ideas with resources. Ideas are not associated with tasks and staffing them does not result in long-term commitments for that staff. For example, you can staff an idea with team members to perform up-front work before approving the idea. Add additional staff to estimate and plan capacity before converting the idea into a project, investment, or service.

You can allocate roles or resources, and labor or non-labor types. The staff can record the time that they spent working on an idea on their timesheet.

Use a role as a placeholder when you do not know the name of the resource you want to staff on your idea. When a specific resource is not available, you can staff your idea with multiple instances of a role. For example, assign programmer (1) and programmer (2) to represent two different requirements with a programming role.

**Note:** You cannot staff multiple instances of the same named resource to an idea.

### Follow these steps:

1. Open the idea.
2. Click Team.
3. To select individual resources or roles for the idea staff. Click Add.  
The Select Resources page appears.
4. To add all the resources in a selected OBS unit to the idea staff, click Add/Update by OBS.
5. 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.
6. Click Add to add the resources and roles. All resources are automatically allocated at 100 percent of their available working days.
7. Adjust any of the following values:

#### Role

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

#### Time

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

### **Booking Status**

Displays the resource or role booking status:

- 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**

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

### **Finish**

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.

8. To open the resource profile and change planned and hard allocations, click the Properties icon.
9. To open the Find Resources page for the selected resource and to replace the resource or role with a different resource or role, click the Resource Finder icon.
10. To edit the properties for a resource, click a resource name in the list.
11. To update the resource or role allocation, click an entry in the Resource Allocation column.

**Note:** When adding resources to your idea staff, you could easily over-allocate the resource by mistake. In this case, a confirmation page appears. 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.

12. Confirm that you want to over-allocate the resource, or accept the remaining availability of the resource. 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.

13. 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.
14. (Optional) View the bottom-up aggregated work effort by role or switch the view to edit the planned work for the idea.

**Note:** 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 \* Number of available hours per day

The total working days includes start and finish dates. ETC is based on the number of hours a resource is assigned to the idea.

15. Save the changes.

## Evaluate and Change Resource Allocations for an Idea

You can adjust the default resource allocations. You can unbook a hard-booked resource, or extend a resource for additional planning. The team detail page of an idea lists planned and committed allocation for an idea by resource and by time period in a graph. Use this view to 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.

### **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.

**Planned Allocation**

A curve that represents the default, or total allocation amount requested by the manager.

**Hard Allocation**

A curve that represents the allocation amount that the resource manager commits.

**Booking Status**

Indicates the kind of booking applied to a resource. This value changes according to the allocation amounts in the planned and hard allocation curves.

Example: The planned or default allocation for a resource is 100 percent. The resource is booked to work on your idea from 8/01/2014 through 11/30/2014. The same resource is also scheduled to work on another idea 50 percent of the time through September 1. The resource is on vacation from 9/15/2014 through 9/22/2014. You could create two rows for two allocation curves for the resource. One indicates a 50 percent allocation from 8/01 through 9/01, and another indicates a zero percent deviation from 9/15 to 9/22.

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. Click Save and Return.

## Change Team Staff 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 a resource.  
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.

## Reset Staff Allocations

You move resource allocations backward or forward in time to shift or scale all or a portion of the resource allocations for 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 only extends for six months.

Example: An allocation starts on May 1 and continues at its default rate of 100 percent through the end of May. Then it extends through June at the reduced allocation of 50 percent. You can shift the allocation to start from June 1 to July 2 (for 31 calendar days) at 100 percent, and continue to August 2 at 50 percent. You can also shift allocations for time spans that contain no segments.

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

- *Set the allocation* to update the allocation of multiple team members at the same time.
- *Commit the planned allocation* to reset a resource hard allocation to be equal to the planned allocation.
- *Accept the hard allocation* to reset a resource planned allocation to be equal to the hard-booked allocation.

### Follow these steps:

1. Open the idea.
2. Click Team.  
The staff list page appears.
3. Select the check box next to a resource.
4. Click Shift Allocation from the Actions menu to shift the allocation, or skip to the next step.  
The allocations page appears.

- a. To change the start and finish dates for the resource allocated to the idea, click Select Date in the Time Span to Shift section.

Data shifts according to the dates you enter in the fields.

- b. 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.

5. From the Actions menu on top right, click Set Allocation, or skip to the next step.

Note: Click More on the team staff page and team detail pages of an idea to use the Set Allocation option.

The allocations page appears.

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. From the Actions menu on top right, click Commit Planned Allocation, or skip to the next step.

The confirmation page appears.

Click Yes to commit the planned allocation to equalize 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.

**Note:** 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. The Hard Allocation section displays on the page depending on your Mixed Booking settings.

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

The confirmation page appears.

Click Yes to set the planned allocation to equal the committed hard-booked allocation. If soft-booked planned segments display in the Planned Allocation section they are removed. All segments are then reset to equal the hard-booked segment. The % Allocation and Allocation column values change. The Booking Status value appears *Hard* because the allocation is fully committed.

**Note:** The Accept Hard Allocation option displays on the page depending on your Mixed Booking settings.

8. Click Save and Return.

## Replace Team Staff Resources

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.

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.

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

<b>Data Type</b>	<b>Transfers</b>
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

## Remove Team Staff Resources

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.

## Capacity Planning Scenarios for Ideas

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. 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. Create them in a portfolio.
- Apply capacity planning to ideas. Use the scenario toolbar to select any existing capacity planning scenarios to which you have access rights. 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.

## View Role Capacity on Ideas

You can view the aggregate role demand including role-based team members and named resources. You can compare the demand and the capacity of the resources that fill those roles.

**Follow these steps:**

1. Select Role Capacity on the toolbar from the idea Team menu.  
The Role Capacity page appears. Resources without a team role are captured on this page in the [No Role] row.
2. View role allocations for the idea, allocations to other investments, and over-allocations. Compare this information with the available role capacity for this idea.
3. (Optional) View this information from inside and outside of a scenario.
4. 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.