CA Clarity™ PPM

IT Service Management User Guide

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Chapter 1: How to Get Started with IT Service Management

This section contains the following topics:

IT Service Management: Introduction

IT services represent a subset of CA Clarity PPM investments such as deploying a new platform or application. As a service manager, you analyze services relative to other investments for their value and cost. Use the IT service management capabilities of the product to implement the following business and IT goals:

- Manage your services and make informed financial decisions. For example, you can view aggregated financial and effort data to determine the total cost of ownership.
- Share investments and services across other investments and services. Each child investment or service can have allocations that define how much a service is shared. You can define the percentage value each child investment or service is allocated to a parent investment in a hierarchy.
- Define budget information, create financial plans, and enable the investment for financial transactions.
- Staff a team to work on the service and related demand (requests or incidents).
- Use processes to notify a manager when the status of an investment changes You can also define a process to perform actions, such as changing the progress to *completed*.
- Audit a historical record of all changes, additions, and deletions for specific investment fields.

IT Service Management: Prerequisites

As a service manager or IT analyst, complete the prequisites in the following checklist:

- ☐ Verify with your administrator that you have the required access rights for the features that you want to use. If you do not have access rights to specific services, they do not display on the list page. If you do not have view access rights to any service, the list is empty.
- ☐ Before you can view the BRM dashboards and portals, contact your administrator to install and to configure the BRM Accelerator. The BRM Accelerator portlets display many data points across projects, tasks, risks, subscriptions, departments, and services. Portlets display data in the following ways:
  - Automatically from other modules
  - Manually entered or imported using the XML open gateway (XOG)
  - Imported by running a job
- ☐ Verify with your administrator that scheduled jobs are running properly. For example, the Investment Allocations job can influence data and performance in IT service management.
- ☐ Verify you have access to the following commonly used IT service management reports:
  - Budget/Forecast Analysis
  - Chargeback GL Account
  - Customer & Provider Chargeback
  - Investment Status
  - Project Transaction Inquiry
  - Resource Assignments
  - Timesheet Detail
  - Capacity vs Demand By Resource (requires the PMO Accelerator)
  - Capacity vs Demand By Role (requires the PMO Accelerator)
- ☐ Verify that your administrator has installed the PMO Accelerator add-in if you need access to the data that it provides.
- ☐ If you are using processes, your administrator can define processes for specific service types. Use the *Processes: Initiated* page to create and run processes on services. For more information, see the *Administration Guide*.
- ☐ If you are using the audit capabilities, verify with your administrator that you have access rights to view the Audit menu. Contact your administrator to configure the audit fields and to determine the information that is stored in the audit trail. For more information, see the *Basics User Guide*.

Chapter 2: How to Manage IT Services

This section contains the following topics:

Open an IT Service

You can view a list of your IT services and open the ones you want to explore.

Follow these steps:

1. Open Home, and from IT Service Management, click Services.

   The list page appears.

2. You can filter, sort, and reconfigure the services list page. The services that display in the list are sorted in ascending order by the service name. You can also save and use filters, build and use power filters, delete filters, and sort lists.

3. To open a service and view details or make edits, click a service by name.

Create or Edit a Service

Use this procedure to create a service. You can also open and edit a service. The same fields apply although their location in the user interface can change.

Note: Administrators and developers can also import a service from another system of record using the XML Open Gateway.

Follow these steps:

1. Open Home, and from IT Service Management, click Services.

2. Click New.

3. In the General section, complete the required fields. The following fields include explanations:

Main Application

Defines the main parent application associated with the new child service.

Manager

Defines the manager of the service. By default, the manager is the user who creates the service.

Start Date and Finish Date

Defines when the service starts and ends.

Note: If the start date and finish dates are not specified, you cannot calculate the allocation data that displays on the Team page.

Set Planned Cost Dates

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

Default: Selected

Goal

Defines the goal for the service that aligns it with your corporate strategy. Examples include Infrastructure Improvement (OPEX) or New Business Development (CAPEX). Your organization defines the values and your administrator sets them.

Alignment

Indicates how the service aligns with the organization business goal. The higher the value, the stronger the alignment. The metric is used in portfolio analysis for comparable business alignment criteria.

When you click Save, the numeric value you enter appears as one of the following status symbols:

- Red: Scores from 0 to 33 are not aligned.
- Yellow: Scores from 34 to 67 are somewhere in the middle.
- Green: Scores from 68 to 100 are aligned.

Status

Indicates the status of the service in the service management lifecycle.

Values: Approved, Rejected, Unapproved

Default: Unapproved

Status Indicator

Displays a graphical representation of the status. For example, if the status is *Approved*, you can visually represent the status as a green stoplight.

Values: Red, Yellow, and Green. When saved, the selection displays as a stoplight symbol.

Stage

Defines the stage in the investment lifecycle. The list of choices is company-specific and depends on the values that your administrator sets.

The metric is used in portfolio analysis when you use comparable stage criteria across all portfolio investments.

Priority

Indicates the relative importance to the organization business goal. The metric is used in portfolio analysis when you use comparable priority criteria across all portfolio investments.

Limit: zero (low) to 36 (high).

Default: 10

Risk

Indicates the numeric score for risk. Lower the value, lower is the risk. The metric is used in portfolio analysis when you use comparable risk criteria across all portfolio investments. Enter a numeric value. When saved, one of the following stoplight symbols is displayed.

- Green. Score from 0 to 33 indicates low risk.
- Yellow. Score from 34 to 67.
- Red. Score from 68 to 100 indicates high risk.

Required

To indicate that the investment meets a business requirement, select this check box. This attribute is used to track investments in portfolios, portlets, or graphs.

4. In the Organizational Breakdown Structure section, associate an OBS with the service for security, organizational, or reporting purposes. When editing properties, if a department is selected on the financial properties page, the field can be auto-populated. The OBS named Department is used to associate the service with a CA Clarity PPM department. If multiple OBS units of the same name exist, the department is listed last.

5. Save the changes.
6. To delete a service, select the check box next to the service and click Mark for Deletion.

   Note: To delete an *active* service, open it and clear the Active check box.

Schedule a Service

Use the schedule page of service properties to set the start and finish dates, time entry, and define the charge code.

Follow these steps:

1. Open a service.
2. Open the Properties menu, and from Properties, click Schedule.

   The properties page appears.
3. In the Schedule section of the page, complete the following fields:

   Start Date

   Defines when the service starts.

   Note: If the start date and finish dates are not specified, you cannot calculate the allocation data that displays on the Team page.

   Finish Date

   Indicates when the service finishes.

   Set Planned Cost Dates

   Indicates if planned cost dates are synchronized with the service start and finish dates. Select the check box to synchronize.
4. In the Tracking section of the page, complete the following fields:

   Time Entry

   Indicates if staff members can enter time on their timesheets for the service. Select the check box to enable the service for time entry.

   Important! To report their time, each staff member must also be enabled for time entry.

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

Track Mode

Indicates the tracking method used to enter time for the service.

Values:

- Clarity. Staff members enter time against their assigned tasks using timesheets.
- None. Non-labor resources, such as expenses, materials, and equipment track actuals through transaction vouchers, or through a scheduler, such as Open Workbench or Microsoft Project.
- Other. Indicates that actuals are imported from a third-party program.

Default: Clarity

Charge Code

Defines the charge code associated with the service. Charge codes help process financial transaction and in financial planning, to track the actuals.

If you enter a different charge code at the task level on timesheets, the task level charge codes override them.

5. Save the changes.

Define a Budget for a Service

Use a simple budget to define the planned cost, net present value (NPV), return on investment (ROI), and breakeven information for the service. You can also define planned costs and benefits for a service.

When you set the start and end date for a budget, funding flows constantly and evenly over the period. A detailed financial plan lets you budget costs over multiple periods.

Note: Data from any detailed plans override the simple budget, and the fields on the page become read-only.

Finance managers set up defaults that define how financial plans can be created and the financial time periods used. The investment managers create multiple financial cost plans as estimates for a budget. They can submit the most appropriate cost plan for approval as a budget. Finance managers approve the submitted cost plans.

Follow these steps:

1. Open the service.
2. Open the Properties menu, and click Budget.
3. Complete the following fields in the financial planning section:

Currency

Specifies the currency for calculating the budget and forecast values.

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

4. 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.

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 service.

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.

5. Complete the following fields in the planned section:

Planned Cost

Defines the total planned cost for the investment. The value is distributed between the Planned Cost Start and the Planned Cost Finish dates.

Planned Cost Start

Defines the scheduled start date for the investment budget.

Planned Cost Finish

Defines the scheduled finish date for the investment budget.

Planned Benefit

Defines the anticipated financial benefit for the investment. The value is distributed between the planned benefit start and finish dates.

Planned Benefit Start

Defines the scheduled start date for the investment benefit.

Planned Benefit Finish

Defines the scheduled finish date for the investment benefit.

Planned NPV

Displays the planned net present value (NPV), which is calculated based on the following formula:

```
Planned NPV = Planned Benefit - Planned Cost
```

Note: To make this field available for data entry, clear the Calculate NPV Data field.

Default: Locked

Planned ROI

The value in the field is calculated based on the following formula:

```
Planned ROI = Planned NPV / Planned Cost
```

Note: To make the field available for data entry, clear the Calculate NPV Data field.

Default: Locked

Planned Breakeven

Displays the date and amount to indicate the period and value at which the program becomes profitable.

Note: To make the field available for data entry, clear the Calculate NPV Data field.

Default: Locked

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.

6. Complete the following fields in the Budget section:

Budget Cost

Displays the total budgeted cost for the investment

Budget Cost Start

Displays the budgeted cost start date of an investment.

Budget Cost Finish

Displays the budgeted cost finish date of an investment.

Budget Benefit

Displays the budgeted benefit for an investment.

Budget Benefit Start

Displays the budgeted benefit start date of an investment.

Budget Benefit Finish

Displays the budgeted benefit finish date of an investment.

Budget NPV

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

Budget ROI

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

Budget Breakeven

Displays the date when the investment budgeted cost equals the budgeted benefit.

Budget IRR

Displays the budgeted internal rate of return for the investment.

Budget MIRR

Displays the budgeted modified internal rate of return for this investment.

Budget Payback Period

Displays the date of the investment budgeted payback period.

7. Save the changes.

Enable Financial Transactions for a Service

You can enable the service for financial processing. Identify the financial location, financial department, and other attributes that are used when processing financial transactions. You can also define transaction rates for the following entities for each service.

- labor
- material
- equipment
- expense

Verify that the following items exist before enabling a service for financial transactions:

- Entity, WIP and investment classes, locations, and rate and cost matrices.
- A department.

Follow these steps:

1. Open the service.
2. Open the Properties menu, and click Financial.
3. In the General section, enter the following:

   WIP Class

   Defines the work-in-process class used to match the investment with rate and cost matrices. The WIP class can also be used for reporting purposes.

   Investment Class

   Defines the investment class used to match the investment with rate and cost matrices. The investment class can also be used for reporting purposes.

   Department

   Defines the department used during transaction processing of chargebacks to charge or credit departments for costs. The department can also be used to match the investment with rate and cost matrices. If a department is selected on the general properties page, this field is auto-populated. Required for chargebacks.

   Location

   Defines the location that is used to match the investment with debit and credit rules for transaction processing of chargebacks. If system or entity defaults indicate that the source location is taken from the investment, use location to match the investment with rate and cost matrices.

4. In the Labor Transaction Rates, Material Transaction Rates, Equipment Transaction Rates, and Expense Transaction Rate sections, enter the following for each transaction type as needed:

   Rate Source

   Defines the rate used during transaction processing to charge for the cost of labor, materials, equipment, or expenses associated with the service.

   Cost Source

   Defines the cost of the labor, materials, equipment, or expenses associated with the service.

   Exchange Rate Type

   If multicurrency is enabled, the exchange rate type indicates how rates and costs are converted.

5. Save the changes.

Manage Incidents for a Service

Use incidents to track the IT demand from users and the work performed by IT analysts on your services. Incidents can include problems, issues, defects, and other requests.

Follow these steps:

1. Open a service.
2. Open the Properties menu and click Incident Categories.
3. Select the incident categories to associate with the service, and click Add. Incident categories group incidents to capture and assess the cost incurred and to view resource utilization.

   Note: Your administrator sets up and maintains the incident categories. Administrators can also associate any service collectively to an incident category.

4. Click Save and Return.
5. To view a list of incidents, open the Properties menu, and click Incidents.
6. To create a new incident, click New.
7. To reassign an incident click Reassign.
8. To convert an incident into a task or project, click Convert.

Define Dependencies for a Service

Dependency relationships exist between services in your portfolio. Dependencies can occur between the start and completion of conflicting tasks, or from budget overruns. You can define investments that depend on your service, and can indicate when your service depends on another investment.

Follow these steps:

1. Open a service.
2. Open the Properties menu, and click Dependencies.
3. Select a mode to add the following:
   - Investments that depend on this one. Displays other investments that are dependent on your investment.
   - Investments this one depends on. Displays other investments that your investment is dependent on.
4. Click Add to add more dependencies to your investment.

   The select investments page appears.
5. Enter the Name and select the investment type in the Type field, or, click Show All.
6. In the Investment Filter section, select the investment names check box, and click Add.
7. Save your changes.

Create and Update Baselines to Measure Progress

Often used with projects, baselines are also available to capture snapshots of total planned effort and estimated costs for a service. A baseline is static. The changes that you make to a service after you create a baseline do not automatically appear in the current baseline. However, you can update a baseline to include new information.

Note: Incident actuals represent unplanned work and are not part of the total effort for baselines.

Create an initial baseline before you enter any resource time. Create more baselines at intervals including mid-way through the service, when different phases are complete, and when the service is complete. The initial baseline lets you compare estimates to actuals when the service is underway.

Follow these steps:

1. Open a service.

2. Open the Properties menu, and click Baseline.

   The baselines page appears.

3. To edit a service baseline, click the name of a baseline revision on the page.
4. To create a baseline, click New.

   The properties page appears.

5. Complete the following fields:

   Revision Name

   Defines the name of the baseline revision.

   Example:

   Initial Baseline, Mid-Term Baseline, or Final Baseline.

   Required: Yes

   Revision ID

   Defines the unique identifier for the baseline revision.

   Example:

   The baseline version number, such as v1 or v5.

   Required: Yes

   Description

   Defines the description for the baseline revision.

   Required: No

   Current Revision

   Defines a baseline revision as the current baseline. The field is display only if a baseline revision exists. By default, the baseline you create last becomes the current project baseline. If you have defined only one baseline, that becomes the current baseline.

   Default: Selected

6. Save the changes.
7. View the following work effort and cost information for a baseline. The information is taken from the columns on the baseline revisions page of service properties:

   - **Usage**. The total effort (actuals plus remaining ETC) at the time the baseline was taken. The actuals are posted against the assignments of the service.
   - **BCWP**. Budgeted cost of work performed at the time the baseline is taken. The cost is the BAC value times the summary level percent complete.

8. (Optional) Use baselines to perform an Earned Value Analysis (EVA) on service performance. An EVA shows how much you have spent on your service and the completed work to date.

   Note: Define rates for the service staff and run the Rate Matrix Extraction job before baselining to get cost baseline values. Complete the percent values on summary tasks before baselining to get BCWP baseline values.

9. To update a baseline, open the Properties menu, and click Baseline.

   The service baseline page appears.

10. Select the check box next to the baseline.

11. Click Update Baseline.

    The confirmation page appears.

12. Click Yes.

    The most recently created baseline becomes the service current baseline by default. If you delete the current revision baseline and more than one baseline exists, then the most recent baseline becomes the current revision.

    When an investment has one baseline, that baseline is marked as the Current baseline. The baseline displays in the list with a yellow checkmark in the Current column. Open a baseline to make it the current baseline, select the Current Revision field, and save the baseline revision.

Manage Subscriptions and Department Chargebacks

A subscription is a request by a department to receive a service. Subscribing departments become consumers of the service. The department managing the service becomes the service provider. As a service provider, use subscriptions to manage relationships with subscribing departments. The subscriptions include costs charged to the subscribing department for services delivered.

You can view a list of all departments that have subscribed to a service, and add or remove departments from the subscription list. Department managers can also subscribe their departments to services. For more information on chargebacks, see the Financial Management User Guide.

Follow these steps:

1. Open a service.
2. Open the Properties menu, and click Subscriptions.
3. Browse or filter subscriptions. Monitor the following information:

   Customer Department

   Displays the department that has subscribed to the service.

BRM

Displays the name of the business relationship manager for the subscribing department.

Incidents

Displays the number of incidents that the subscribing department has logged against the service.

Charges

Displays the aggregate charges that the subscribing department has currently approved for the delivered service.

SLA Violations

Defines the number of service level violations that the subscribing department had logged against the service.

4. To subscribe a department:
   a. Click Add.

      The add subscriber departments page appears.

   b. Browse or filter departments to add to the subscription list, and click Add.
   c. Click Return.

      Note: To charge a department for the delivered service, update the chargeback debit rule by adding GL allocations for the newly subscribed department. Work with your IT finance manager and the subscribing department manager to determine when to start charging back for services.

5. To remove a subscription:
   a. Select the check box next to each customer department to cancel subscription, and click Remove.

      The confirmation page appears.

   b. Click Yes.

      Note: When you cancel a subscription, be sure to update the chargeback debit rule, and remove the GL allocation for the department. Otherwise, the department continues to be charged for services.

Evaluate Capacity Planning Scenarios for a Service

Scenarios allow you to apply a systematic methodology to optimize a service. Apply scenarios to the service to analyze how staffing changes or shifts in dates affect the outcome of your investment.

Follow these steps:

1. Open a service.
2. In the scenario toolbar below the page toolbar, select a capacity planning scenario.

   The scenario is set as the current scenario.
3. Evaluate the service by switching between a scenario and the plan of record.
4. (Optional) To create a capacity planning scenario, click Create in the scenario toolbar.

Chapter 3: How to Build a Service Hierarchy

This section contains the following topics:

Service Hierarchies

You can manage services in a hierarchy with other investments including projects, assets, applications, products, services, and other work. The financial hierarchy displays an aggregation of the planned cost, actual cost, and remaining cost for your investments. The time-varying values factor in the investment allocation percentages that you have defined.

The *financial* rollup and the *effort* rollup are hierarchical representations of the investments, services, and ideas that comprise your service. As you build your hierarchy, the planned costs for a child investment or service roll up to the parent service. These aggregated costs appear on the *financial* rollup. Similarly, the associated child investment or service aggregated work values roll up to the parent service on the *effort* rollup.

You can also share services between other investments, services, and ideas. For example, you can share a database server that supports two software applications. You could achieve the following goals:

- Add the software applications as child investments to the database server investment hierarchy.
- Edit the child investment or service cost allocation percentage and time segments.

Your service investment allocation percentage determines what portion of a service is allocated to another service, investment, or idea. All cost data in the investment hierarchy is based on the allocation percentages.

Define Child Investments and Allocations

As a service owner or investment manager, define the allocations for each child investment and service in the hierarchy. When you add the first child investment to your service, its allocation is set to 100 percent. You can edit the allocation percentage for a child service, investment, or idea. Child investment cost totals are automatically aggregated in the parent service based on the investment allocation percentages.

Follow these steps:

1. Open a service.
2. Open the Hierarchy menu and click Financial Rollup.
3. Select the check box next to the desired child service, and click Add Child.
4. Select the check box next to the investments and click Add.
5. Click Return.
6. Click the allocation amount for the child investment.

   The set allocations page appears.
7. In the Allocation field for your service, enter the child investment percentage that is allocated to the parent service or investment.
8. Save the changes.
9. To remove a child service from the financial rollup, select the check box for the service and click Remove.
10. Click Return.

Define Parent Investments and Allocations

You can add one or more parent investments to a service. Define the allocations for each child investment in the service hierarchy. Investment and service allocations can be split among more than one parent investment. The total combined allocation is always 100 percent.

Follow these steps:

1. Open a service.
2. Open the Hierarchy menu, and click Parents.

   The parents list page appears.

3. Click Add to select one or more investments that you want to designate as parent investments.
4. In the Allocation field, enter the allocation percentage for the parent investment.
5. To remove a parent, select the check box for the investment and click Remove.
6. Save the changes.

Examine the Effort Rollup for a Service

You can view the total work effort that was performed on the approved or unapproved investments, services, and ideas in the hierarchy.

Follow these steps:

1. Open a service.
2. Open the Hierarchy menu, and click Effort Rollup.
3. To view each service including any parent or child services, expand or collapse the items in the hierarchy.
4. Examine the aggregation of the child service labor-related information including the ETC, EAC, and actual work variances. The aggregation takes into account the child investment or service allocation percentages.
5. Depending on the view you select in the hierarchy, the Self line item displays the work values or costs for the parent service. The line items below the Self line are for any child investments or services.
6. To filter the list, select an option from the Status field.
7. To adjust allocations to align with business goals, you can also add or remove child investments or services.

Examine the Financial Rollup for a Service

You can view financial data in a hierarchical list that shows your child investments, services, and ideas. All the child costs and benefits are rolled up to the parent service and appear on the parent service line item.

You can track the costs incurred to build, maintain, and support your service. You can also track the allocation percentages, planned costs, actual costs, remaining costs, planned benefits, planned ROI, and planned NPV. You can modify the service by adding or removing child investments.

Follow these steps:

1. Open a service.

2. Open the Hierarchy menu, and click Financial Rollup.
3. Examine the parent and child services in the financial rollup including values for the following fields:

   Planned Cost

   The planned costs for the investment including the costs rolled up from any child investments based on their allocation percentages.

   Actual Cost

   The costs incurred from billing and invoices. If the service is unapproved, the actual costs are also rolled up from the child investment or service. The costs are rolled up after the investment allocation percentage is factored in. That is, the service status is something other than *Approved*.

   Remaining Cost

   The difference between the planned costs and the actual costs.

   Planned ROI

   The planned return on the investment and its child investments.

   Planned NPV

   The net present value on the investment and its child investments.

   Planned Benefit

   The sum of the planned benefit from the investment, service, or idea detailed budget. The planned benefit represents the anticipated future revenues for the investment.

   TCO

   The total cost of ownership is the aggregated amount of costs derived from running or operating a service. Operating a service involves managing all supporting investments such as projects, applications, and ideas. The TCO metric tracks costs and shared allocations. Use TCO to manage a service budget and compare aggregated costs accrued from other investment types.
4. To determine TCO, add one or more child investments to a service. View the aggregated cost and labor totals from the hierarchical bill of investments.
5. To filter the list, select an option from the Status field.

   Note: By default, the service financial and effort rollups display a list of approved and unapproved child investments.
6. To adjust allocations to align with business goals, you can also add or remove child investments or services.

Chapter 4: How to Staff a Service Team

This section contains the following topics:

Service Teams

As a manager, you can assign a team of resources or roles to work on a service. You can implement many of the same features that are available for projects. For example, when working with service teams, you can engage in the following activities:

- Plan capacity by role.
- Add or update resources and roles by OBS.
- Change staff roles and requirements.
- Shift and scale allocations for roles or resources.

IT analysts, engineers, consultants and other staff can record the time that they work on services, incidents, and requests on their timesheets.

Note: Services are not associated with tasks and staffing them does not result in long-term commitments for any resources.

Add Resources or Roles to a Service Team

To staff a service, add specific named labor resources, nonlabor resources, or roles as placeholders. Resources are automatically allocated at 100 percent of their available working days. You can adjust allocations, over-allocate resources, or automatically allocate only the remaining availability of the resource.

You can add multiple instances of a role to a service but not multiple instances of the same named resource. For example, assign a developer role twice to represent two different requirements for a resource with developer skills.

Follow these steps:

1. Open a service and click Team.

   The team staff page appears.

2. Review the team staff page of the service before you add more staff to the service. The page contains the following columns and icons:

Properties icon

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

Resource Finder icon

Opens the Find Resources page for the selected resource. You can replace the resource or role with a different one.

Resource Allocation

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

Role

Displays the role of the resource for this assignment. The role 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 timesheet values for this investment.

Booking Status

Displays the resource or role booking status.

Values

Hard. The resource is committed to the investment

Soft. The resource is tentatively scheduled for the investment.

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

Start

Displays the team member allocation start date. If the date is not defined, the default is the start date of the investment.

Finish

Displays the team member allocation finish date. If the date is not defined, the default is the finish date of the investment.

% Allocation

Displays the percentage the team member is allocated to the investment.

Allocation

Displays the number of hours the resource is tentatively booked to the investment. Unless you change the booking dates, staff members are automatically booked for the entire duration. You cannot directly edit the allocation, but change allocation using the following:

- The setting allocation options.
- The new allocation curves defined on the resource staff member properties page.
- The Shift Allocation option

Allocated Actuals

Displays the total number of hours of the resource to date on the investment.

Incident Actuals

Displays the time posted to incidents associated with this investment.

Total Actuals

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

3. To add resources and roles, click Add.

   The select resource page appears.

4. Select the resources and roles to add to your service staff.

   Note: Use a role as a placeholder when you do not know the name of the resource. Or, use role if the resource is not available for staffing on your service.

5. Use the Search Filter to find resources or roles by name or other criteria.
6. Click Add to add the resources or roles you select.
7. (Optional) To add team members to your service at the OBS level, click Add/Update by OBS.
8. (Optional) You can book overallocated resources to a service. When the available hours are less than the number of requested hours, the remaining availability confirmation page appears to indicate that the resource is overbooked.

   - If you book the resource at 100 percent (default) of their availability, the 100% Resource Allocation column lists the number of hours used.
   - The Remaining Availability column indicates the actual number of work hours the resource has available to work on the service.

   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.

9. (Optional) To remove a resource, select its check box and click Remove.

   Note: You cannot remove a resource if they posted actuals or submitted actuals pending for the service.

10. Save your changes.

Define Staff Requirements for a Service

After adding the resource or role to your service, use the resource or role staff member page to modify the staffing requirement.

Follow these steps:

1. Open the service and click Team.
2. Click the Properties icon for the resource or role.
3. Edit the staff member properties:

Requirement Name

Displays the name of the staffing requirement.

Start and Finish Date

Defines the team member allocation start date and finish date for the investment.

Default: The investment start date and the investment finish date.

Default % Allocation

Defines the percentage of time to allocate the resource to the investment (you can enter 0 percent). The change updates the Allocation and Allocation % columns on the investment team staff page.

Booking Status

Indicates the commitment level for the staff member allocation. Staff member bookings are soft, hard, or mixed.

The booking status is set automatically when team members are booked or their allocation changes.

Request Status

Determines the staffing requirement type.

Default: New

Resource

Displays the resource associated with the requirement.

Investment Start and Finish Date

Displays the start and finish date of the investment.

Investment Role

Defines the role for which resources are requested for the investment.

Example: Developer, Business Analyst, Architect

Staff OBS Unit

Defines the Staff OBS Unit.

Default: The investment Staff OBS Unit value, if defined.

Open for Time Entry

Specifies if the resource can use timesheets to track time that is spent on task assignments. When cleared, the resource cannot log time on any project.

Default: Selected

4. Complete the following fields in the Resource Search section:

Resource Employment Type

Indicates if the resource is a contractor or a full-time employee.

Resume Keywords

Defines the keywords from the resume of the resource.

Planned Allocation

Defines the total percentage of time the resource is planned to be allocated to the investment, as requested by the investment manager. The allocation also specifies the start and end dates.

Hard Allocation

Defines the total percentage of hard-booked allocation of the resource to the investment (as entered by the resource manager). The allocation also specifies the start and end dates of the allocation.

No hard allocation value exists until the resource manager hard-books the allocations.

5. Save the changes.

Examine Role Capacity for a Service

Use the aggregated view of all role demand to plan the staffing requirements for a service. You can examine the capacity of each resource by role.

Follow these steps:

1. Open a service and click Team.
2. Click the Team menu and select Role Capacity.
3. View role allocation for the service and compare it with the allocations for other investments or services. The investment hierarchy aggregates the data of a role and each subinvestment allocates a specific percentage to the service.
4. View available role capacity for the service and subinvestments.
5. You can also view resources without a team role in the [No Role] row.
6. (Optional) View this information from inside or outside a scenario. For example, a role can appear to be over-allocated. Click the Staff icon to open the team staff page and examine the resources that are using the role.

Define Resource Allocations for a Service

A staff allocation represents the assignment of a specific resource to a service. Staff members are automatically booked for the entire duration of the service. You can change the booking dates and other staff allocation information.

Follow these steps:

1. Open the service, and click Team.
2. Edit the following fields:

Resource

Displays the resource name. Click the resource name link to open the resource properties.

Role

Defines the resource role for the investment.

Time

Indicates if the resource can enter time for work completed on the investment.

Booking Status

Indicates the resource booking status for the investment.

Start and Finish

Defines the start and finish dates the resource is booked to the investment. When you change the dates, the value in the Allocation column is updated.

% Allocation

Defines the default amount this resource is allocated to this investment. You can enter zero (0) as the allocation percentage. Changes also update the value in the Allocation column.

Allocation

Displays the number of hours the resource is tentatively booked. An allocation amount is generated for each resource by multiplying the total number of working days between the service start and finish dates (including the start and finish dates) by the number of hours the resource is available to work each day. ETC is based on the number of hours a resource is assigned to the service.

Allocated Actuals

Displays the total number of hours that the resource has been assigned to this investment.

Incident Actuals

Displays the time posted to incidents associated with this investment.

Total Actuals

Defines the total actuals posted for this resource.

3. Save the changes.

Adjust Resource Allocations for a Service

You can adjust resource allocations including extending a resource assignment or unbooking a hard-booked resource.

For example, the planned or default allocation for a resource is 100 percent. The resource is booked to work on your service from April 1 to July 1. The resource is also scheduled to work on another service 50 percent of the time from April 1 to April 30. The resource plans to be away on vacation from May 15 to May 22. In this case, you can create two allocation curves. One curve indicates a deviation to 50 percent from April 1 to April 30. Another curve indicates a deviation to 0 percent from May 15 to May 22.

Follow these steps:

1. Open the service, and click Team.
2. Click the Properties icon next to the resource and examine the following items:

   Planned Allocation

   This curve represents the total *planned* (default) allocation amount that the service manager originally requested.

   Hard Allocation

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

   Note: The booking status for a resource automatically adjusts to changes in the planned and hard allocation curves. The project management Allow Mixed (default) Booking setting determines your ability to view the Hard Allocation section.

3. In the Default % Allocation field, enter the percentage of time for the resource that is allocated to the service. For example, enter 0, 50, or 100 percent.

   The change is reflected in the Allocation and Allocation % columns on the team staff page.

4. Examine the planned and hard allocations for your services and identify deviations from the Default % Allocation field.
5. Create one row for each deviation from the default allocation. Continuing our example at the beginning of this topic, create two rows:

   a. One row represents the period when the resource works at 50 percent.

   b. A second row represents the period when the resource works at 0 percent (out of office).

6. To create a planned or hard allocation period:
    a. Enter a Start date for the period.
    b. Enter 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. For example, enter 0, 50, or 100 percent.
7. Save the changes.

Shift, Commit, or Accept Resource Allocations

You can also make the following types of changes to resource allocations:

- **Shift Allocation**: You can shift or scale all or a portion of the resource allocations in a service. Shift allocations to extend them beyond the allowable time-scaled view, which is six months. For example, an allocation starts May 1 at its default rate of 100 percent until May 31 and then extends through June at the reduced allocation of 50 percent. If you change the start to June 1, the allocation shifts from June 1 through July 1 (31 calendar days) at 100 percent. Then it extends through August 2 at 50 percent. You can also shift allocations for time spans that contain no segments.
- **Commit Planned Allocation**: You can set the hard allocation to equal the planned allocation. To hard-book the segments, edit the planned allocation segment for a resource. A resource with a hard booking status implies that the resource is fully committed. Committing planned allocation does not reset the default allocation percentage.
- **Accept Hard Allocation**: You can remove soft-booked segments in the Planned Allocation section. All segments are reset to equal the hard-booked committed segments.

Follow these steps:

1. Open the service, and click Team.
2. Select the check box next to the resource to shift allocations.
3. To shift or scale allocations:
    a. Open the Actions menu, and click Shift Allocation.
    b. In the Time Span to Shift section, change the start and finish dates that the resource is allocated to work on the service. As you move data, segmented allocation dates are kept intact, even when the percent allocated for each segment changes.

c. In the Time Shift Parameters section:

- In the Shift to Date field, enter the date when you want the shifted allocation to begin.
- In the Shift Cut-off Date field, enter the ending date for shifting allocations. Allocations cannot shift beyond the last date.
- In the Scale Allocation % By field, enter the percentage change in the allocation that is required for the shift.

4. To commit the planned allocation so that it becomes the hard allocation:
   a. Open the Actions menu, and click Commit Planned Allocation.

      The confirmation page appears.

   b. Click Yes.
5. Conversely, to accept the hard allocation and reset the planned allocation to match the hard allocation:
   a. Open the Actions menu, and click Accept Hard Allocation.

      The confirmation page appears.

   b. Click Yes.

      All allocations are fully committed. All segments are reset to equal the hard-booked committed segments. The Booking Status value changes to *Hard*.The % Allocation and Allocation column values are updated..
6. Save the changes.

   The change reflects in the Allocation column on the staff page of service team.

Set Allocations for Multiple Team Members

You can set the allocations of multiple team members at the same time.

Follow these steps:

1. Open the service, and click Team.
2. Select the check box next to the resource to update allocation.
3. Open the Actions menu, and click Set Allocation.

4. In the General section, set the following allocations for the selected team members:

   Start Date and Finish Date

   Defines the date when the allocation starts and ends.

   Select the Reset to Match Investment Start Date check box to reset the resource staffing requirements to match the service start and finish dates.

   Default Allocation %

   Defines the resource allocation for the service.

5. Select the Clear existing allocation segments check box in the Existing Allocation Segments section of the page. Such selection removes all allocation segments for the selected team members.

6. Complete the following fields in the New Allocation Segments section of the page to create an allocation segment for the selected team members:

   Start and End

   Defines the date when the allocation starts and ends.

   % Allocation

   Defines the percentage the resource is allocated to the service.

7. Save the changes.

Edit Planned and Committed Allocations for a Service

As a service manager, you want to answer the following questions:

- How much resource availability do I have for a service?
- Which resources are overbooked or under booked, and by how much?

You can examine the planned and committed allocation for a service by resource and by time period in a graph.

Follow these steps:

1. Open a service.
2. Click the Team menu and select Detail.

   Allocations appear by resource, allocation, and time period.
3. Scroll over a time period.

   A note with a brief summary appears.
4. Examine the time period columns and allocation colors. The columns are set to *weekly* by default, and always start with the current week.
   - Yellow indicates resources that are allocated at or under availability for that time period.
   - Red indicates resources that are over-allocated. The amount of time booked exceeds availability for that time period.
   - Green indicates resource allocations to other investments, ideas, or services.
5. To edit the time-related values, click in the graph. For example, you can edit the time cells for each resource.
6. Save your changes.

Replace Resources on a Service Team

You can replace the staff members who are assigned to a service team. Use the availability score to find a replacement with similar skills. You can replace a resource with a different resource and can replace a role with a resource.

Note: The replacement process can result in over-allocated resources.

Follow these steps:

1. If possible, advise the original staff member to complete and post their time entries before the replacement occurs.
2. Open a service, and click Team.
3. Next to the name of the resource to replace, click the Resource Finder icon.
4. Examine the following fields:

   Availability

   Identifies the assignment period and the number of hours for the resource allocation. The replacement operation transfers the dates and the hours shown to a new replacement.

Availability Match

Displays a score that factors in the duration of the assignment (work period) and the availability of each potential matching resource. The higher the score, the closer the match.

When no skill specifications are added to your search criteria, the Total Match column duplicates the Availability Match score. The Skill Match column can be blank. If you enter search criteria for skills and availability, the Total Match column displays an average of the two scores.

The following message appears at the top of the page:

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

If a discrepancy exists between the date range in the message and the dates in the Availability field, the Availability Match score can be inaccurate. For example, the dates in the Availability field could be 10/1/2017 to 2/7/2018. The date range in the message could be 10/7/2019 to 10/7/2020. A comparison cannot be found for any resource. This situation lowers the overall availability match scores.

5. Select the check box next to the new resource and click Replace.
6. To confirm, click Yes.
7. 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 new resource receives the following properties from the resource that was replaced:
   a. Availability Start (if the date has not passed and if the new resource is not booked on that date)
   b. Availability Finish
   c. Remaining Allocation
   d. Remaining ETC
   e. Percent (%) Allocation

   Note: The actuals, pending actuals, and baseline of the original staff member are not transferred to the new staff member.

Change Staff Member Roles on a Service

You can change the role of a staff member on a service. The change is not permanent for the resource. The change in role applies only at the local service level.

Follow these steps:

1. Open a service, and click Team.
2. Click the Properties icon next to a resource.
3. In the General section, select a value in the Investment Role field.
4. Click Add.
5. Save the changes.

Chapter 5: The BRM Accelerator

This section contains the following topics:

How to Set Up the BRM Accelerator

The BRM Accelerator is an add-in set of portlets that is part of the IT Service Management module.

Set Up the BRM Accelerator Fields

As an administrator, install the add-in and then configure the BRM Accelerator add-in fields. The BRM content is available to users when you install the add-in. However, users cannot view IT service data until you perform the following tasks:

- Complete this procedure using CA Clarity PPM Studio.
- Set up fields and attributes for other objects that your organization wants to implement using Studio.

Follow these steps:

1. Click Administration. Under Studio, select Objects.
2. Open the Service object.
3. Click the Attributes tab.
4. Activate the following attributes for the service object:

   Service Type

   The type of service. Add the field to the service properties page. The service types are defined in a lookup table that includes the following values by default:

   - Infrastructure
   - Maintenance
   - Mission Critical
   - Revenue Generation Support

   Note: The Service Type field is a standard search field. You can use this field to search on services by their type attribute.

Business Alignment

Add the Business Alignment field to the service properties page. The page indicates how well the service aligns to the business goals of the organization. The field takes a numerical value from 1 to 100. The standard *Alignment* stoplight indicates the following:

- Red. The value in the Business Alignment field is between 0-33.
- Yellow. The value in the Business Alignment field is between 33-66.
- Green. The value in the Business Alignment field is between 66-100.

5. Set up the following fields on the Key Metric object, a child of the Subscription object.

Threshold Indicator

Add the Threshold Indicator field to the Create Keymetric, Edit Keymetric, and Keymetric list pages. The field appears as the Higher Values Better check box. If the check box is selected, the values above the threshold are acceptable. If the check box is cleared, the values below the threshold are desirable.

The Higher Values Better check box indicates how the stoplights are determined for a specific key metric field. For example, if you create a new key metric named Number of Suspended Users and clear the check box. Indicates to the data provider for the Value Metrics portlet that values below the threshold are better.

Type

The Type field categorizes the custom metrics for BRM Accelerator portlets. For example, the Metrics portlet uses values labeled with the Value category when you select the Value link in the Service Health portlet on the Service Layout: Dashboard page. The Type field appears on the Create Keymetric, Edit Keymetric, and Keymetric list and filter pages for a department subscription. Type is a standard text field with a drop-down lookup table that includes the following default values:

- Value
- Utilization
- Closed Incidents
- Created Incidents
- Other

Set Up Service Desk Integration

The BRM Accelerator provides insight into financial, resource, and service delivery metrics for services and investments that IT manages and business units consume. Some BRM Accelerator portlets include information and counts about incidents. You can track the incidents using external systems including CA Service Desk Manager. Use one of the following methods to gather the incident data:

- manually enter in CA Clarity PPM
- import using the XML Open Gateway (XOG)
- import using the *Import Unicenter Service Desk Data* job

How Incidents Portlets are Populated

The Import Unicenter Service Desk Data job calls a process that uses a GEL tag to communicate with the Service Desk database to retrieve incident data. The job runs on a schedule and performs the following:

- Retrieves customer-by-service incident counts from Service Desk.
- Infers the correct customer and service in CA Clarity PPM.
- Stores the counts in attributes on the Subscription object in CA Clarity PPM.

Each time the job runs, it replaces the previous values. When the integration method is used, Service Desk is the system-of-record for incidents. CA Clarity PPM is the system of record for the targets (or thresholds) for acceptable incident counts that are shown in some BRM Accelerator portlets.

For the job to run successfully, the following parameters must be correct:

- The Service Desk Contact ID matches a CA Clarity PPM username.
- The Service Desk incident configuration item matches a CA Clarity PPM Service ID.
- The incident affected User is a CA Clarity PPM user.
- The CA Clarity PPM user definition includes the OBS Department association to the same department that is subscribing to the service that the user is reporting against in Service Desk. When importing incident data, the association lets the system know to look for the match between Service Desk contact ID and CA Clarity PPM username.

Relevant CA Clarity PPM Fields

CA Clarity PPM stores the incident data as part of the Key Metrics object (child of the Subscriptions object). This object has general attributes of code, name, type, and start and finish dates with a target value and an actual value. The Service Desk data is displayed in monthly increments. Only the past six months plus the current month of Service Desk incident information is used. Two key metrics types exist for incidents: Created Incidents and Closed Incidents. Open incidents are handled separately as only a total count of open incidents is needed.

Customer-created incidents by service are stored as key metrics for the appropriate subscription. New subscriptions are created, if necessary, to hold this information. Key metrics can represent both time-varying actual values and time-varying target values. The data import from Service Desk populates the actual values whereas you need manually enter, or otherwise import, the target values. The minimum granularity of this data in CA Clarity PPM is by month, because portlets are defined to show it at that level.

All created incidents display the following attributes:

Key Metric ID or Name

The ID or name of the created incident.

Note: The integration updates the key metric with the expected ID, not necessarily the expected name.

Actual Value

The count of incidents based on when they were created (that is, by their open date or time). Includes closed incidents from that date or time.

Closed Incidents by customer by service are also stored as key metrics. All closed incidents display the following attributes:

Key Metric ID or Name

Displays ID or name of the closed incident.

Actual Value

Displays the count of incidents by when they were closed (that is, by their close date or time).

The open incidents count is a snapshot (as of the last time the integration was run) of the number of incidents that do not have a close date or time. The count of open incidents by customer by service is stored in a scalar (that is, not time-scaled) format. The count is stored in the No. of Incidents attribute on the Subscription Properties: Main page. The target value is also a scalar attribute shown on this page (Incidents Threshold).

Relevant Service Desk Fields

The following lists the Service Desk fields that the Import Unicenter Service Desk Data job uses for calculations for the incident portlets. Not all the fields are stored in CA Clarity PPM. Certain fields are necessary only for matching up Service Desk values with CA Clarity PPM objects. The Service Desk values are retrieved from the Incident, Request, and Problem objects. The objects contain the same fields on their details pages. The database schema, therefore, is virtually the same for each of the objects.

Tracking ID (Service Desk DBS ID)

The database unique ID from Service Desk. If differentiating already-counted incidents and new incidents is required, the logic that counts incidents uses the tracking ID field.

Reported By

The user name in Service Desk entered in the System Login field. The Reported By field determines the CA Clarity PPM user. The user name requires matching with the CA Clarity PPM user name. Based on the CA Clarity PPM username, the job locates the specific CA Clarity PPM department.

Open Date/Time

The create date for the incident in Service Desk. The open date and time are necessary for time variance calculations.

Close Date/Time

The close date for the incident in Service Desk. The close date and time are necessary for time variance calculations.

Configuration Item

The configuration item in Service Desk. This field associates the Service Desk object (in this case, incident) with the service in CA Clarity PPM. Administrators require entering manually the CA Clarity PPM service names into the Service Desk lookup table for configuration items. Thus, a configuration item name in Service Desk matches with the CA Clarity PPM service name to assign an incident.

Relevant BRM Portlets

The following lists and describes BRM Accelerator portlets that use the data imported from Service Desk and how they retrieve the data:

Service Delivery stoplight

This stoplight on the provider portal page is based on open incidents for all the customers that subscribe to the service. The data is retrieved as follows:

a. Each customer open incident data is considered.

b. The open incident data is compared to the incident threshold on their subscriptions.

c. The stoplight is determined. Then, compared across each subscribing customer stoplights to see what the overall stoplight is.

Customer Watch portlet

This portlet on the Service Layout: Dashboard page is a bubble chart that uses the number of open incidents for one customer subscribing to a service. The portlet retrieves this data using an individual customer open incident count for a specific service.

New Incidents Trend portlet

This portlet on the Service Layout Dashboard page and the provider dashboard page of department layout uses created incidents logged by all the customers subscribing to a specific service. The portlet gathers the data using the created incidents for the past six months. Also considers the current month for each customer that has a subscription to the service. The portlet also shows a threshold line, based on manual entry of a target value for the created incident key metrics. Only one target line appears that aggregates the target values for all customers.

Open Incidents by Customer portlet

This portlet on the service incidents analysis and provider portal pages uses open incidents by customer for a specific service. The portlet derives the data by selecting the open incidents that a customer logs against any service that the provider department includes as an investment.

Customer Scorecard portlet

If the open incident count is beyond the threshold on the subscription definition, the Customer Scorecard portlet shows a stoplight for each customer per service. In alternative forms, the portlet shows the incident count in aggregate. The aggregate represents whether the customer has an incident count beyond threshold on any service or not.

Open Incidents by Service portlet

This portlet on the provider portal page uses open incidents for a specific service. The portlet derives this data by aggregating the open incidents for each customer that has a subscription to the service.

Services Incident Watch portlet

This portlet on the provider portal page uses open incidents per service. The portlet derives this data by aggregating the open incidents that customers have logged against each service that the provider department includes as an investment.

Open and Closed Incidents portlet

The portlet on the provider portal page uses created incidents and closed incidents across all services that the provider department has as an investment. The portlet retrieves the data by aggregating both created and closed incidents. The customers log such incidents against each service that the provider department includes as an investment.

Set up the Import Unicenter Service Desk Data Job

Before setting up the Import Data job:

- Create Contact IDs in Service Desk that match the user IDs for the BRM in CA Clarity PPM.
- Set up the CA Clarity PPM service names (against which the incidents are assigned) as configuration items in Service Desk.
- Create incidents in Service Desk and attach them to the configuration items and the affected end users or Contact IDs.

For more information, see the *Administration Guide*.

Follow these steps:

1. Open the Personal menu, and click Reports and Jobs.

   The list page appears.

2. Click the Import Unicenter Service Desk Data job.

   The properties page appears.

3. Enter the following required parameters:

   Unicenter Service Desk URL

   Defines the URL for the Service Desk system from where the incident data is imported. The URL is the address of the Axis service for Service Desk.

   Unicenter Service Desk Password

   Defines the password for the Service Desk system from where the incident data is imported.

   Unicenter Service Desk Username

   Defines the user name for the Service Desk system from where the incident data is imported.

4. Specify when to run the job. You can run it immediately, or schedule it to run at a future date or time. Optionally, set recurrence.
5. Optionally, specify resources or groups to notify about failure or completion of job.
6. Save the changes.

How to Use the BRM Accelerator

BRM Accelerator

The Business Relationship Manager (BRM) Accelerator add-in is part of the IT Service Management module. The BRM Accelerator facilitates improved engagement between IT service delivery and business units. The add-in includes a unique subset of portlets in each of the following dashboards and portals:

- The Service Dashboard provides service managers with alerts and metrics about a specific service.
- The Provider Dashboard provides IT and department managers with alerts and metrics about a specific provider department.
- The Customer Dashboard provides IT and department managers with alerts and metrics about a specific customer department.
- The Provider Portal displays service metrics across all provider departments.
- The Customer Portal displays service metrics across business relationship manager customers.

To benefit from BRM Accelerator dashboards and portlets, verify that your organizational structure includes the following entities:

- Multiple customer and provider departments with department managers
- Business relationship managers who work with customer departments and IT
- Provider departments that own services
- One or more customer departments that subscribe to services
- Statistics and key metrics that are tracked on the customer departments
- Assets, applications, and projects that are assigned to services.

Department Subscriptions (BRM Accelerator)

Customer departments can subscribe to services provided by provider departments. Each subscription has metrics that are used in BRM Accelerator portlets for the dashboards and the portals. Most key metrics are user-defined values. The incident data is imported from Service Desk.

To view the metrics, click Properties for a service subscription name.

The following metrics are used in BRM Accelerator portlets:

Customer Satisfaction Rating

A percentage value indicating the level of customer satisfaction with the subscription. This field accepts percentage values limited to values of 1-100. Based on this percent amount, stoplight rules for customer satisfaction are hard-coded. This field appears on the Subscription Properties: Main page.

No. of SLA Violations

The total number of SLA violations for this subscription. This field appears on the Subscription Properties: Main page.

SLA Violations Threshold

The threshold number for SLA violations for this subscription. This field appears on the Subscription Properties: Main page.

Number of Incidents

The total number of open incidents for this subscription.

Incidents Threshold

The incident threshold number for the incident stoplight values. This field appears on the Subscription Properties: Main page.

No. of Change Orders

The total number of change orders for this subscription.

Subscription Charges

The amount charged to the customer for this subscription.

No. of Total Users

The total number of users or customers for this subscription.

No. of Active Users

The number of active users or customers for this subscription.

No. of Page Hits

The number of times this subscription website (if one exists) has been visited.

Key Metrics

A link to the Key Metrics page for the user to define the key metric type being created. For example, Closed Incidents, Created Incidents, Other, Utilization, or Value. The stoplights are based on metric type; whether the value is over the target threshold or not; and whether the Higher Values Better check box is selected. Only user-defined teams are applicable. If there is no predefined key metric for Created Incidents or Closed Incidents, import them from Service Desk creates one on the subscription.

Access BRM Accelerator Dashboards and Portals

To access the BRM Accelerator, select Provider Portal or Customer Portal from the IT Service Management menu.

You can view data from the following portals:

Provider Portal

Displays metrics such as financial, customer, resource, and service request information. The portlets on the portal, use stoplights and graphs to alert the IT executive or manager to any areas that need attention. The view aggregates all service information based on the departments handled by the IT executive or manager.

Customer Portal

Focuses on service metrics and costs. The customer portal also contains portlets with graphs, grids, and information to notify the Business Relationship manager of any issues with their customer services. The view on the customer portal is limited to the departments assigned to the Business Relationship manager.

You can access the service and department dashboards from the Service and Department.

Access the Dashboard from a Service

Follow these steps:

1. Open Home, and from IT Service Management, click Services.
2. Open a service to view its dashboard.
3. Click Dashboard.

Access the Dashboard from a Department

Follow these steps:

1. Open Home, and from Organization, click Departments.
2. Open a department to view its dashboards.
3. Click Provider Dashboard or Customer Dashboard.

Service Dashboard

The Service dashboard is available from the Service object and includes multiple portlets with drill-downs. Individual service managers or high-level IT managers typically use the dashboard.

Service Health

This portlet contains a list of metrics. Each metric appears with a stoplight to indicate its status. The service owner can quickly determine service areas that:

- Are over set thresholds (red)
- Are in between and monitoring or watching (yellow)
- Are running smoothly (green)

Data appears for currently active and approved investments, change orders, and risks, or investments waiting to begin. Canceled or completed investments are not included.

Data on the portlet is derived from a set of user-defined key metrics on the key metrics page of subscription properties. The metrics include a target and actual start and finish displayed by time period.

Service Health is presented in a hierarchical grid containing the Metric and Status columns. The top-level metrics of the portlet (Service Support, Management, and Projects and Change Orders) each have a stoplight. The top-level stoplights aggregate or roll-up all the included stoplights.

When you expand the top-level metrics, the following extra metrics are available:

Value

Displays all the key metrics that have the Value type. The values that you want below the threshold appear with the following scale:

- Red. Any value for any customer within the last three months is >100 percent.
- Yellow. Any value for any customer within the last three months is >80 percent (if no red stoplight, then checks for yellow).
- Green. Any value for any customer within the last three months is <=80 percent.

The values that you want above the threshold appear with the following scale:

- Green. Any value for any customer within the past three months is >120 percent.
- Yellow. Any value for any customer within the past three months is >100 percent (if no green stoplight, then checks for yellow).
- Red. Any value for any customer within the last three months is <100 percent.

To view the Metrics portlet prefiltered to display only the Value tagged key metrics for department subscriptions, click the Value metric link. The portlet displays data in a grid format with embedded time-scaled value (TSV) graphs. The number of rows in this portlet is based on the number of key metrics there are for a given type. The number of rows is also based on the selected value from the drop-down (that is, Closed Incidents, Created Incidents, Other, Utilization, or Value).

By default, the TSV section uses a time period of the past three months and the next three months based on the current date. The actual value and the threshold value are displayed for comparison.

ROI

Indicates the return on investment. Click the ROI metric link to go to the Service Properties: Budget page for the selected service. The following stoplights appear:

- Red. The ROI value is <0 percent.
- Yellow. The ROI value is <15 percent.
- Green. The ROI value is >=15 percent.

Utilization

Displays all key metrics that have the Utilization type. If values below the threshold are desirable, the following stoplights appear:

- Red. The utilization value is >=100 percent of target threshold for any customer with the last three months.
- Yellow. The utilization value is >=90 percent of target threshold for any customer with the last three months (if no red, then checks for yellow).
- Green. The utilization value is <90 percent of target threshold for any customer with the last three months.

If values above the threshold are desirable, the following stoplights appear:

- Red. The utilization value is <=70 percent of target threshold for any customer within the last three months.
- Yellow. The utilization value is <=90 percent of target threshold for any customer within the last three months (if no red, then checks for yellow).
- Green. The utilization value is >90 percent of target threshold for any customer with the last three months.

Click the Utilization metric link to go to the Metrics portlet prefiltered to display only the Utilization tagged key metrics for department subscriptions. The Metrics portlet is described in the Value metric section.

Incidents

This metric is determined based on the aggregation of open incidents for any customer subscribing to the service. The Incidents Threshold attribute on the subscription properties page stores the incident threshold value. The following stoplights appear depending on the number of open incidents:

- Red. The incidents are >30 percent above their designated threshold.
- Yellow. The incidents are >10 percent above their designated threshold (if no red, then checks for yellow).
- Green. The incidents are <=10 percent above their designated threshold.

Click the Incidents metric link to go to the Service Incidents Analysis page. The portlet page houses the incident portlets that are part of the Service Dashboard drill downs, including:

New Incidents Trend

Provides information about the number of created or new incidents filed over a six-month period, including the current month. Incident data is retrieved from Service Desk using the Import Data job. You can also manually enter created incident data from the Subscription Properties: Key Metrics page. Select Created Incidents for the key metric type, and enter the target and actual values for each desired time period.

New Incidents Trend is presented in a grid with a histogram. The Customer column displays the department name and the Service column displays the service name to which the customer has subscribed. One portion of the histogram displays the total number of new incidents by customer for this service across the past six months (including the current month). The second portion displays the threshold line for the created incidents. The threshold line can be different for each customer and is part of the target values for each created incident row.

Open Incidents by Customer

Graphically Displays open incidents categorized by customer. Incident data is retrieved from Service Desk using the Import Data job. Data appears in columns and shows the total number of open incidents for this specific service for each customer. The X-axis displays customers and the Y-axis displays the number of incidents.

SLA

This metric is based on each subscribing customer service level agreement (SLA) violations. Anything above the threshold is considered undesirable. The following stoplights appear depending on the number of SLA violations:

- Red. A customer is over their threshold limit.
- Yellow. A customer is between 1 and their threshold limit. For example, if threshold is 3, then the numbers for a yellow stoplight can be 1, 2 and 3.
- Green. The value is 0 (zero) for all SLA violations for all customers.

Click the SLA metric link to go to the Customer Scorecard portlet which lists specific service metrics broken out by the customers for this service. Data appears as a grid showing stoplights and stack bars for certain metrics for all the customers of the selected service. Includes the following columns:

Customer

The name of the customer department subscribing to the service.

Charges

The subscription charges for the department.

Incidents

The total number of open incidents across all customers for this specific service. The following stoplights appear:

- Red. The incidents are >30 percent above their designated threshold.
- Yellow. The incidents are >10 percent above their designated threshold.
- Green. The incidents are <=10 percent above their designated threshold.

Satisfaction

This column refers to the Customer Satisfaction Rating field on the subscription properties page. The following stoplights appear:

- Red. The customer is <50 percent satisfied.
- Yellow. The customer is <80 percent satisfied.
- Green. The customer is >=80 percent satisfied.

SLA

This column refers to the SLA Violations Threshold field on the subscription properties page. The following stoplights appear:

- Red. The customer is over their threshold limit.
- Yellow. The customer is between 1 and their threshold limit. For example, if threshold is 3, then the numbers for a yellow stoplight can be 1, 2 and 3.
- Green. SLA violations are zero in this case.

Satisfaction

This metric derives its data from the Customer Satisfaction Rating field located on the subscription properties page. The value in the field is a percentage from 1 to 100. The following stoplights appear depending on the satisfaction rating:

- Red. A customer satisfaction is <50 percent.
- Yellow. A customer satisfaction is <80 percent (if no red, then checks for yellow).
- Green stoplight. A customer satisfaction is >=80 percent.

Click the Satisfaction metric link to go to the Customer Scorecard portlet. This portlet is described in the SLA metric section.

Budget

The metric is determined based on the comparison of the actual costs and the planned costs. The comparison is made from the beginning of the year to the date of the latest actuals. Click the metric link to go to the service financial plan page which lists the cost plans for the specific service. The following stoplights appear for this metric depending on the comparison value:

- Red. The comparison value is >120 percent of the planned cost.
- Yellow. The comparison value is >100 percent of the planned cost (if no red, then checks for yellow).
- Green. The comparison value is <=100 percent of the planned cost.

Cost Recovery

This metric is based on recovered costs in comparison to the total costs for the service for the current year. The total costs are the actual costs for the service as calculated on the financial rollup page of service hierarchy. The recovered costs are calculated from the transactions listed on the chargebacks page and include all recovered costs for the current calendar year. Click the Cost Recovery link to refresh the page.

The following stoplights appear for this metric depending on the costs recovered:

- Red. The costs recovered are <80 percent of the total actual costs over the current year.
- Yellow. The costs recovered are <100 percent of the total actual costs over the current year (If no red, then checks for yellow).
- Green stoplight. The costs recovered are >=100 percent of the total actual costs over the current year.

Workload

The metric is based on the sum of the actuals, ETC for the past month, and the current month in comparison to the baseline work for the service over the same time. Any actuals, ETC, and baseline work of the child investments for the service are not included. Click the metric link to go to the effort rollup page of service hierarchy. The page displays how the allocations of the child investments roll up to the parent investment on the service hierarchy.

The following stoplights appear for this metric depending on the workload:

- Red. The workload is >120 percent of baseline work.
- Yellow. The workload is >100 percent of the baseline work (if no red, then checks for yellow).
- Green. The workload is <=100 percent of the baseline work.

Compliance

This metric aggregates all the service compliance factors. Click the metric link to go to the compliance page of service properties. The following stoplight definitions are based on the overall Compliance stoplight that aggregates all the compliance fields on the compliance page:

- Red. The Compliance attribute on the compliance page has a red stoplight.
- Green. The Compliance attribute on the compliance page has a green stoplight.

Assets and Applications

This stoplight represents a single aggregated compliance value for both the Assets and Applications compliance pages. Click the metric link to go to the service assets page which displays portlets for the assets and the applications assigned to this service.

The following stoplight definitions are based on the overall Compliance stoplight that aggregates all the compliance fields on the service assets page:

- Red. One or more of the aggregated asset or application compliance metrics are red.
- Yellow. One or more of the aggregated asset or application compliance metrics are yellow and none are red.
- Green. One or all of the aggregated asset or application compliance metrics are green and none are red or yellow.

Projects

This metric is based on the aggregation of the Status Indicator field across all projects associated with the service through its hierarchy.

The following stoplights appear depending on the project status:

- Red. A project associated to the service has a red status indicator.
- Yellow. A project associated to the service has a yellow status indicator.
- Green. A project associated to the service has a green status indicator.

Milestones

This metric is based on the completion date for key tasks that belong to projects associated with the service hierarchy. Any tasks that are tagged as Change Orders are not included.

The following stoplights appear depending on the key task milestones:

- Red. A key task that is due within a three month window (including the current month, the prior month, and the next month) is more than two weeks beyond the baseline finish date.
- Yellow. A key task that was due within a three month window is more than two days beyond the baseline finish date (if no red, then checks for yellow).
- Green. If there are no red or yellow stoplights, green appears.

Click the Milestones metric link to go to the service key tasks and milestones page. This page includes the Key Tasks and Milestones portlet that uses the key tasks data in CA Clarity PPM. This portlet only displays those key tasks that belong to the investments listed on the service hierarchy page.

The data is selected based on the following field values:

- Project Status. Approved
- Project Active Field. Selected
- Project Progress. Started, Not Started
- Task Status. Started, Not Started
- Task Percent Complete. Must be <100 percent

Data on the portlet appears as a grid displaying data for up to three months in the future, including the current month.

The following columns appear:

- Project. The project name attribute on the Project object. Clicking a project name link takes you to the project properties page.
- Name. The task name attribute on the Task object. Clicking a task name takes you to the task properties page.
- Start. The Start Date attribute on the Task object.
- Finish. The Finish Date attribute on the Task object.
- Status. The Status attribute on the Task object.
- % Complete. The percent completed attribute on the Task object.
- Gantt. The Gantt chart uses the current baseline and the finish date for the Gantt bars. The chart uses the same stoplight rule to color the Gantt chart as the Milestones stoplight on the Service Health portlet.

Risks

This metric is based on the aggregation of project risks and change order (task) risks. Project risk is an attribute on the Project object. Change order and task risks are attributes on the Task object. The data is pulled from the investments on the service hierarchy.

The following stoplights appear depending on the nature of the risks:

- Red. One or more high priority risks exist.
- Yellow. One or more medium priority risks exist.
- Green. No high or medium priority risks exist.

Click the Risks metric link to go to the service risks page which includes the Risks portlet. The portlet is similar to the Milestones portlet and includes risks for projects and change orders (tasks) that are part of the service hierarchy.

The data is selected based on the following field values:

- Project Status. Approved
- Project Active Field. Selected
- Project Progress. Started, Not Started
- Task Status. Started, Not Started
- Task Percent Complete. Must be <100 percent
- Task Type. Change Order
- Risk Status. Open, Work in Progress

The portlet displays data in grid format for up to three months into the future, including the current month. All the tasks associated to a project are displayed, including those tasks with change order associations.

The following columns are included:

- Project. The Name attribute on the Project object. Clicking a project name takes you to the project dashboard.
- Risk. The Name attribute on the Risk object. Clicking a risk name takes you to the risk properties page.
- Change Order. The Name attribute on the Change Order (Task) object. Clicking a change order name takes you to the task properties page.
- Priority. The priority attribute on the Risk object.
- Owner. The assigned owner for the risk. The Owner attribute on the Risk object.
- Impact. The Impact attribute on the Risk object. The following stoplights appear:
  - Red. The risk impact is high.
  - Yellow. The risk impact is medium.
  - Green. The risk impact is not high nor medium.

Probability

The Probability attribute on the Risk object. The following stoplights appear:

- Red. The risk probability is high.
- Yellow. The risk probability is medium.
- Green stoplight. The risk probability is not high nor medium.

Status

The value from the Status field drop-down (Open, Work in Progress, Resolved, or Closed).

Change Orders

The Task Finish Date attribute is used in this stoplight. Tasks labeled as “Change Orders” with the Task Type attribute are selected. Click the metric link to refresh the page. The following stoplights appear:

- Red. Any change order that is due within a three month window (starting from the current date, including one month before and one month after) is more than two weeks beyond the baseline finish date.
- Yellow. Any change order that is due within a three month window, is more than two days beyond the baseline finish date.
- Green. Any change order that is due within a three month window, is less than or equal to two days beyond the baseline finish date.

Customer Watch

The Customer Watch portlet shows the relationship of customers to the service by highlighting utilization, amount charged, incident count, and SLA violations. The data is presented in a bubble chart, with the larger customers to the upper right. The smaller customers shown to the lower left of the chart. The service owner can view all their subscribing customers in relation to pertinent service metrics.

Note the following about the bubble chart:

- Each bubble represents a customer department. Clicking a bubble takes you to the department subscriptions page that lists all customers subscribed to that department.
- The bubble size represents the incident count (that is, the total number of open incidents that the customer logged against the service). The higher the incident count, the larger the bubble.
- The X-axis displays charges (an attribute on the subscriptions page of service properties).
- The Y-axis displays utilization numbers based on the Utilization key metric type on the key metric type page.
- The bubble color represents SLA violations. A field for entry of SLA violations exists on the subscription properties page accompanied by a field to indicate the threshold. The customer manually enters the fields.

The following colors apply:

- Red. The customer is over their threshold limit.
- Yellow. The customer is not over their threshold. For example, if threshold is 3, then the numbers for using a yellow bubble can be 1, 2 and 3.
- Green. The SLA Violation field is 0 (zero) for the customer.

Project Analysis

The Project Analysis portlet displays data representing the different projects and change orders currently in progress. Anything that is canceled or completed is not used in the portlet. The service owner can manage the planned modifications for their services using this portlet.

The Project Analysis portlet displays data in a hierarchal grid format. The top level of hierarchy displays project names. Click a project name to go to the project properties page. When you expand a project name, the key task and change order names for that project are displayed on the second level. Click a change order name to go to the task properties page for the change order. Click a task name to go to the task properties page for that task.

The portlet includes the following columns:

Name

Displays the project, key task, or change order name.

Baseline Cost

Displays the project baseline cost or monetary value.

Actual Cost

Displays the actual costs for the project.

Cost Variance

Displays a percentage deduced by comparing the baseline cost and the actual cost.

Gantt

Displays the Gantt chart graphic for the project or the task. The Gantt bars are colored based on the lateness of the task or proximity of the task to its completion date. They are blue until they are late. Once considered late, they appear in red.

Provider Dashboard

The Provider Dashboard is available on the Department object and shows data for departments marked as providers. Includes multiple portlets with drill downs that highlight customer statistics, delivery of services, cost of delivering services, and future service requests. An individual provider department manager or high-level IT management use the dashboard.

Using the following portlets, the department managers can view the aggregate of their services:

- Customer Watch
- Project Analysis
- All Services

Customer Watch

The Customer Watch portlet shows the relationship of subscribing customers with the services that the provider department owns. The portlet highlights utilization, amount charged, incident count, and SLA violations. This data is presented in a bubble chart. The larger customers appear to the upper right and the smaller customers to the lower left.

Note the following about the bubble chart:

- Each bubble represents a customer that subscribes to a service owned by this provider department.
- The Y-axis displays the number of services. Each customer department includes a list of services as part of the subscriptions. The count also includes the sub department services.
- The X-axis displays the subscription charges.
- The data for the bubbles is across all the services that the customer subscribes to and supported by the provider department. For incidents and charges, the data is summed for all the services.
- The following logic is used for coloring the SLA Violations stoplight:
  - Red. Any subscription has a red stoplight.
  - Yellow. Any subscription has a yellow stoplight.
  - Green. No red or yellow stoplight.

Project Analysis

The Project Analysis portlet displays data representing the different projects and change orders currently in progress. The portlet is similar to the Projects Analysis portlet on the Service Dashboard except for the following differences:

- You can filter by project, project manager, or service
- The column names include: Name, Service, Baseline, Actual, CV, and Gantt
- Any sub department services are also included

All Services

The All Services portlet contains a list of metrics with a stoplight to indicate the status for each metric. The IT executive or manager can quickly determine the service areas. The areas include over set thresholds (red), requiring a watch (yellow), and running smoothly (green). Includes sub department services, if any.

The All Services portlet on the Department object is similar to the Service Health portlet on the Service object except for the following differences:

- The provider department can own multiple services.
- The provider department can include any sub department services.
- All the stoplights are aggregated across all services that the provider department owns.

The following is a list of portlets that you can drill down through the metrics in the All Services portlet. The portlets are different from the drill-down portlets accessible from Service Health on the Service Dashboard.

Metrics

Click the Value or Utilization metric link to access the portlet. The portlet displays key metrics data as a list by service (prefiltered to display either Value or Utilization key metric type data only). The provider department owns the services.

New Incidents Trend

Access this portlet by clicking the Incidents metric link. The portlet displays the total number of the incidents that the customer creates for all the services. Services are the ones that the provider department has owned in the past six months (starting with the current date).

Open Incidents by Customer

Access this portlet by clicking the Incidents metric link. The portlet displays the total number of open incidents for all services the provider department owns, for each subscribing customer.

Budget Analysis

Access this portlet by clicking the Budget metric link. The portlet shows the actual and planned costs for each service the provider supports. Data is displayed in a grid and includes the following columns:

Service

The Service Name attribute on the Service object. Clicking a service name takes you to the service budget page.

Actual Cost

The Actual Cost attribute on the Service object.

Planned Cost

The Planned Cost attribute on the Service Object.

Variance

The difference between Planned Cost and Actual Cost.

Status

The following stoplights appear based on the comparison value of the actual costs and the planned costs. The costs are considered from the beginning of the year to the date of the latest actuals.

- Red. The comparison value is >120 percent of the planned cost.
- Yellow. The comparison value is >100 percent of the planned cost.
- Green. The comparison value is <=100 percent of the planned cost.

Workload Analysis by Service

Access this portlet by clicking the Workload metric link. The portlet shows the actual work and remaining work compared to baseline work for each individual service that the provider department supports. Data is presented in a grid and includes the following columns:

Service

The Service Name attribute on the Service object.

Actual Work

The total amount of work in number of hours.

ETC

The ETC attribute (in number of hours) on the Service object.

Baseline Work

The Baseline Work attribute (in number of hours) on the Service object.

Service compliance

Access the portlet by clicking the Compliance metric link. The portlet shows each individual service for the provider department and their compliance stoplights. Used with the compliance stoplight on the Service Health portlet on Service Dashboard instead. Data is displayed in a grid and retrieved from the individual compliance pages for each service. The following columns appear:

- Name. The Service Name attribute on the Service object. Clicking a service name link takes you to the compliance page for that service.
- License Compliance. The overall Compliance stoplight on the compliance page for that service.

Key Tasks and Milestones

Access this portlet by clicking the Milestones metric link. The data on this portlet is based on the projects associated to each service hierarchy that the provider department owns. The following columns are displayed:

Service

Displays the service name attribute for each service that the provider department supports.

Project

Displays the project name on the service hierarchy.

Name

Displays the key task or milestone name for the project.

Start/Finish

Displays the start and finish dates for the task or milestone.

Status

Displays the status of the key task or milestone.

% Complete

Displays the completion status of the key task or milestone expressed as a percentage.

Schedule

Displays the project schedule.

Risks

Access this portlet by clicking the Risks metric link. The data on this portlet is based on the projects and key tasks associated to each service (through the hierarchy) that the provider department supports. The Service Name attribute on this portlet refers to each service that the provider department supports.

Assets

Access this portlet by clicking the Assets and Applications metric link. The data for this portlet is retrieved from the Asset object. Data is selected based on the following field values:

- Asset Status. Approved
- Asset Progress. Started, Not Started

Data appears in grid format and includes all assets associated with the service through the hierarchy. The following columns appear on this portlet:

Name

The asset name attribute on the Asset object.

Category

The asset category.

Status

This stoplight is based on the Status Indicator stoplight on the asset properties page, aggregated across all assets on the service hierarchy. The following determines which stoplight appears:

- Red. One or more red stoplights.
- Yellow. One or more yellow stoplights.
- Green. No red or yellow stoplights.

Regulatory Compliance

This stoplight is based on the Regulatory Compliance stoplight on the compliance page of asset properties, aggregated across all the assets on the service hierarchy. The following determines which stoplight appears:

- Red. An asset regulatory compliance metric is a red stoplight.
- Green. No red stoplight.

License Compliance

This stoplight is based on the License Compliance stoplight on the compliance page of asset properties, aggregated across all the assets on the service hierarchy. The following determines which stoplight appears:

- Red. An asset license compliance metric is a red stoplight.
- Green. No red stoplight.

Maintenance Compliance

This stoplight is based on the Maintenance Compliance stoplight on the compliance page of asset properties, aggregated across all the assets on the service hierarchy. The following determines which stoplight appears:

- Red. An asset maintenance compliance metric is a red stoplight.
- Green. No red stoplight.

Risk

The Risk attribute on the Asset object.

Applications

Click the Assets and Applications metric link to access the Applications portlet. The portlet is identical to the Assets portlet except that all the data is retrieved from the Application object based on the service hierarchies.

Customer Dashboard

The Customer Dashboard available on the Department object shows data for departments selected as customers. Includes multiple portlets with drill downs. An individual customer department manager or a business relationship manager use the dashboard.

The department manager can view the statistics about the following:

- Service delivery
- Utilization
- Cost of services subscribed to
- Current requests for service change
- Specific charges to the customer for using the service.

The following portlets are available:

- Subscription Watch
- Project Analysis
- Customer Charge Analysis
- All subscriptions

Subscription Watch

The Subscription Watch portlet shows services subscribed based on utilization, amount charged, incident count, and SLA violations.

The department manager can view the most expensive subscriptions, and utilization and number of SLA violations. The data is presented in a bubble chart. Each bubble represents a service.

Click a bubble to go to the Service Dashboard. Mouseover a bubble to display the service name.

Project Analysis

The Project Analysis portlet displays data representing different projects and change orders. Such projects and orders would be currently in progress for all the services subscribed by the department. The portlet is similar to the Project Analysis portlet on the Service Dashboard, except that it includes an extra Service attribute. The attribute lists the service name that a project or change order is associated with through the hierarchy.

Customer Charge Analysis

The Customer Charge Analysis portlet compares actual costs and planned costs for each service over a six month window. The portlet provides the department manager with access to current information about the service budget with regard to the actual cost for delivering the service. Data is displayed in a column graph with a vertical column for each service. The X-axis displays cost amounts and the Y-axis displays service names based on services that the customer is subscribed to.

All Subscriptions

A subscription is a service to which the customer department is subscribed and is being charged to use.

The All Subscriptions portlet is similar to the Service Health portlet on the Service Dashboard. Contains a list of metrics with a stoplight to indicate the status for each metric.

Unlike the Service Health portlet, there is no Management section for this portlet. The department manager can quickly determine areas of their subscriptions that are over set thresholds (red), requiring a watch (yellow), and running smoothly (green). The display includes one or more services that the customer department has subscribed to.

The following describes the metrics and the portlets that All Subscriptions metrics link to.

Value

Click this link to access a list of key metrics by service and all such services are included that the customer is subscribed to. Click this link to go to the Metrics portlet prefiltered by the Value metric type.

Utilization

Click this link to access the Metrics portlet prefiltered by the Utilization metric type.

Incidents

Click the Incidents link to access the following portlets on the customer incidents analysis page:

New Incidents Trend

The New Incidents Trend portlet is the same as the New Incidents Trend portlet on the Service Dashboard. Except that the data displayed being the total number of new incidents by customer. The data applies to all services subscribed in the past six months (starting from the current date).

Customer Open Incidents by Service

The portlet is the same as the Open Incidents portlet on the Service Dashboard. Except that the data displayed is the total number of open incidents for all services that the customer subscribes to.

SLA

Click the SLA link to access the Scorecard portlet. The portlet lists service names and includes specific service metrics and stoplights (charges, incidents, satisfaction, SLA) for each service the customer subscribes to.

Satisfaction

Click the link to access the Scorecard portlet.

Projects

Click to refresh the page.

Milestones

Click the link to display the Key Tasks and Milestones portlet. The portlet is similar to the Key Tasks and Milestones portlet accessible from the Service Dashboard. Except that the data displayed is based on the projects associated with each service hierarchy that the customer subscribes to. Therefore, multiple services instead of a single service. The Service Name attribute on the portlet refers to service names from the provider department.

Risks

Click this link to display the Risks portlet. The portlet is similar to the Risks portlet accessible from the Service Dashboard. Except that the data displayed is based on the projects associated with each service hierarchy that the customer subscribes to. Therefore, multiple services instead of a single service. The Service Name attribute on this portlet refers to service names from the provider department.

Customer Portal (BRM Accelerator)

You can view the Customer Portal in the capacity of a business relationship manager for at least one customer department.

The Customer portal is designed to let the business relationship manager get up-to-the-minute information about all the customers supported and the serviced.

The portlet comprises the following:

- Subscription Delivery
- Subscription Requests
- Subscription Charges

You can access the Customer portal from IT Service Management.

Subscription Delivery

The subscription delivery page contains the following portlets:

Subscription Watch

Displays a bubble chart showing subscribed services by highlighting utilization, amount charged, incidents count, and SLA violations. The business relationship manager can see subscriptions that cost the most, and utilization and number of SLA violations. This portlet includes all the subscribed services for all the customers of the business relationship manager. Each bubble on the graph represents a service. Clicking a bubble drills you down to the Service Dashboard. The Y-axis displays the number of customers that the business relationship manager has been assigned to. This count includes the sub departments for the customers. The X-axis displays the subscription charges.

Scorecard

Displays a grid showing stoplights for certain metrics. Displays a list of customers that the business relationship manager manages and aggregates the stoplights based on all the subscriptions of those customers. Click a customer name to access the Customer Dashboard.

Metrics

Displays utilization key metrics data from each customer subscription. Lets the business relationship manager view the metrics their customers are tracking. Also, if any of the metrics have over set thresholds. Click a customer name to access the Customer Dashboard.

Action Items

Supports the use of the customer portal as the default overview page. An out-of-the-box action items portlet.

Subscription Requests

The subscription requests page contains the following portlets:

Ideas

Pulls pertinent idea statistics together across all the services to which the business relationship manager customers subscribe. Ideas are retrieved based on the user belonging to one of the departments with which the business relationship manager is associated. Each idea displayed is associated to a service to which the department subscribes. The attributes in the portlet derive their information from the following objects:

- Idea
- Service
- Department

Data appears on this portlet as a grid and includes the following columns:

Priority

Displays the priority from the Idea object.

- Red. A high priority idea.
- Yellow. A medium priority idea.
- Green. A low priority idea.

Service

Displays the service name listed on the idea hierarchy. The Service Name attribute is associated with the Service object.

Idea Subject

Displays the idea subject from the Idea object.

Department

Displays the department that the user belongs to.

Estimated Benefit

Displays the estimated benefit from the Idea object.

Estimated Cost

Displays the estimated cost from the Idea object.

Submitted Date

Displays the submitted date from the Idea object.

Approval Date

Displays the approval date from the Idea object.

Project Analysis

Displays the data representing the different projects and change orders currently in progress for the services subscribed by all of the business relationship customers. Data is presented in a hierarchal grid. The top-level displays project names.

Note: Click a project name to access the project properties page. To view a list of tasks, expand a project. The Service attribute displays the service name that a project or change order is associated with through the hierarchy.

Subscription Charges

The subscription charges page contains the following portlets:

Department Invoices

Displays a view of the current invoice amount for each of the business relationship manager customers in the current and prior fiscal period. The attributes in the portlet derive their information from the following objects:

- Department
- Invoice

Data is displayed in a grid format and includes the following columns:

Name

Displays the customer department names from the Department object that the business relationship manager supports. Click a customer name to access the Consumer Dashboard.

ID

Displays the invoice number from the Invoice object. Click an invoice number to access Invoice from the customer department.

Invoice Date

Displays the invoice date from the Invoice object.

Amount

Displays the invoice amount from the Invoice object.

Period

Displays the fiscal period for which the invoice includes charges.

Status

Displays the status from the Invoice object.

Charges by Service Over Time

Displays all the services to which the business relationship manager customers subscribe. Also, the total invoice amounts aggregated for each service over the last six months. The data is displayed as a line graph with one line per service. For example, if a business relationship manager has three services that the customers use, three lines appear with plotted spots for the specified time period. The X-axis displays months and the Y-axis displays cost amounts.

Invoice History

Provides a snapshot of invoice charges for each customer over a six month time period. The charges are aggregated across all services subscribed by the customer. The data is displayed as a line graph with one line per customer. For example, if a business relationship manager has three customers, three lines appear with plotted spots for the specified time period. The X-axis lists the six months backwards, starting from the current date. The Y-axis displays the cost amounts.

Provider Portal

You can view the Provider Portal in the capacity of a department manager with at least one provider department. Approve all invoices before the data appears in the financial portlets.

The portal is available as a link in IT Service Management. Designed to provide the IT executive or manager with up-to-the-minute information about services and customers across multiple provider departments.

The portlets have the following:

- Overview
- Customers
- Incidents
- Projects/Change Orders
- Workload
- Financials

Note: A case of an overlap: An IT executive or manager handles a department and a service. The service is a part of the hierarchy of a second service that the same IT executive or manager handles. Both services are counted.

Overview

The Overview page contains the following portlets:

Action Items

Supports the use of the Customer Portal as the default overview page. An out-of-the-box action items portlet that exists elsewhere in the product.

All Services

Displays a list of metrics with a stoplight to indicate status for the metric. The IT executive or manager can determine areas of services that are over set thresholds (red), requiring a watch (yellow), and running smoothly (green).

Note: The portlet differs from the Service Health portlet on the Service Dashboard. The IT executive or manager can view multiple departments and their services, rather than merely one department and its services. The following metrics are included in the portlet:

Value

Click to access the Metrics portlet prefiltered to display key metrics of the Value type.

Utilization

Click to access the Metrics portlet prefiltered to display key metrics of the Utilization type.

Incidents

Click to access Incidents on the Provider Portal.

SLA

Click to access the Customer Scorecard portlet. The portlet is a link with specific service metrics aggregated across customers.

Satisfaction

Click to access the Customer Scorecard portlet.

Budget

First calculate the aggregate values for the services represented to stoplight the metric. Then apply the stoplight rules defined for the Service Health portlet on the Service Dashboard. Click the metric link to go to the Budget Analysis portlet. The portlet displays the same data as when accessed from the Provider Department – Budget metric link.

Cost Recovery

First calculate the aggregate values for the services represented to stoplight the metric. Then apply the stoplight rules defined for the Service Health portlet on the Service Dashboard. Click the metric link to refresh the page.

Workload

First calculate the aggregate values for the services represented to stoplight the metric. Then apply the stoplight rules defined for the Service Health portlet on the Service Dashboard. Click the metric link to go to the Workload Analysis by Service portlet.

Compliance

Click to access the Service Compliance portlet. The stoplight is aggregated as follows:

- Red. Any service represented has a red stoplight.
- Yellow. Any service represented has a yellow stoplight.
- Green. Any service represented has a green stoplight.

Assets and Applications

Click to access the service assets page, which includes portlets for Assets and for Applications.

Projects

Click to refresh the page. The stoplight shows the overall status of the projects. Such projects are associated with services that the IT manager is in charge of across all provider departments that they own.

Milestones

Click to access the Key Tasks and Milestones portlet.

Risks

Click to access the Risks portlet.

Change Orders

Click to refresh the page. The stoplight shows the overall status of all change orders inside or outside of a project. The projects are associated with all the services that the IT manager is in charge of across all provider departments that they own.

Customers (BRM Accelerator)

The Customers page contains the following portlets:

Value

Displays value key metrics data on each customer subscription. Lets the IT executive or manager view the metrics that their subscribing customers are tracking, and if any of the metrics are over set thresholds.

Click a customer name link from this portlet to go to the department Customer Dashboard. Click a service name link to go to the Service Dashboard. Click a metric name to go to the key metric properties page.

Utilization

Displays utilization key metrics data on each customer subscription. Lets business relationship managers view the metrics that their subscribing customers are tracking. Also, if any of the metrics are over set thresholds.

Customer Scorecard

Displays a grid showing stoplights for certain metrics. Displays a list of services that the IT executive or manager manages. Also, aggregates the stoplights based on all the services the IT executive or manager owns.

Incidents (BRM Accelerator)

You can track incidents using external systems including CA Unicenter Service Desk. The incident data can be manually entered in CA Clarity PPM, imported through XOG, or the Import Unicenter Service Desk Data job.

The Incidents page contains the following portlets:

Open Incidents by Service

Displays the number of open incidents for each service that the IT executive or manager own. The data is imported from Service Desk. Data appears in this portlet as a pie chart. Each pie slice represents a service. The width of the pie represents the number of incidents for that service. Mouseover a pie slice (a service) to view the number of open incidents for that service.

Services Incident Watch

Displays the relationship between individual services with number of subscribing customers and their incident counts and SLA violations. The data comes from all the services owned by the IT executive or manager. The portlet displays a bubble graph with each graph bubble representing one service. Only those services are included that this provider supports. The following provides details about the graph:

- The X-axis displays charges, part of the Subscriptions object aggregated across customers for the service.
- The Y-axis displays number of customers subscribing to the service.
- The bubble size represents incident count (that is, all open incidents for that service). The higher the incident count, the larger the bubble. This number is aggregated across all customers using the service.
- The bubble color represents SLA violations. The violation is determined based on the subscribing customer SLA violations aggregated for each service. This information is derived from the SLA violation fields on the Subscription Properties: Main page. The customer manually enters the field values.

  The following stoplights appear:

  - Red. The customer is over their threshold limit.
  - Yellow. The customer is not over their threshold. The customer is between 1 and their threshold limit. For example, if threshold is 3, then the numbers for using a yellow bubble can be 1, 2 and 3.
  - Green. The number of SLA violations is 0 for the customer.
- When you mouseover a bubble, the service name that this bubble represents, appears.

Open Incidents by Customer

Displays the number of open incidents for each customer across all the services that the IT executive or manager owns. The data is imported from Service Desk. Data in the portlet appears as a pie chart. Each pie slice represents a customer department and the pie width represents the number of incidents for that customer department. Mouseover a pie slice (a customer) to view the number of open incidents for that customer.

Open and Closed Incidents

Compares the number of open incidents to the number of closed incidents for a specific time period. The data comes from all the services that the IT executive or manager owns. The portlet displays a column graph with two columns for each time period. One column represents open Incidents and the other represents closed incidents. The X-axis displays the past six months starting from the current date. The Y-axis displays the number of incidents.

Projects/Change Orders

The projects/change orders page contains the following portlets for services owned by IT executives and managers:

Project Analysis

Provides a set of stoplights and other data representing the projects and change orders in progress for the services. The analysis is similar to the Project Analysis portlet on the Service Dashboard. Except that data in the portlet can include multiple departments comprising multiple services. The Service attribute represents a service name that a project or change order is associated to (through the hierarchy).

Risks

Displays the Project and Change Order risks for the projects listed on the service hierarchy for each of the services. The portlet is also accessible from the Service Dashboard through the Risks metric. The only difference is that on the Provider Portal, the portlet handles multiple departments with multiple services.

Key Tasks and Milestones

Displays the key tasks that belong to the projects listed on the service hierarchy for each of the services. The portlet is also accessible from the Service Dashboard through the Milestones metric. The only difference is that on the Provider Portal, the portlet handles multiple departments having multiple services.

Workload

The workload page contains the following portlets:

OBS Resource Aggregation

Displays specific data about resource demand for OBS structures.

Time Spent by Service Type

Compares number of hours worked across specific monthly time periods. The service type breaks the data for the IT executive or manager to view the service areas receiving the most resources. The data is retrieved from the Service Type attribute on the Service object and the total number of days for each resource. The resource must be assigned to services of that type or to any investment on the service hierarchies, as the hierarchy allocation percentage scales. Stacked columns are displayed in this portlet and each stack in a column represents a service type. The X-axis displays time periods in months (three months before the current date and three months after the current date). The Y-axis displays the number of hours (calculated using actuals and remaining allocations).

Employee/Contractor Time Comparison

Displays a histogram detailing the differences between the dollar amounts spent for outside contractors in relation to the dollar amounts spent for internal workers. The histogram shows to an IT manager how their labor is being handled across all services that they own. The histogram displays two columns per time period. One column displays total number of hours for all employee resources working on a service, or the investments associated to the service hierarchy. The hierarchy percentages scale the columns. The other column displays total number of hours for all contractor resources that are assigned to a service. The total number of hours is the resource assignment. The Type attribute on the resource object designate contractors and employees. The X-axis displays time periods in months (three months before the current date and three months after the current date). The Y-axis displays the number of hours (calculated using actuals and remaining allocations).

Financials

The financials page contains the following portlets:

Recovery Statement

Displays all the chargeback dollars that are recovered. Also, calculates any variance between total service cost and monies received. A list of services displays with their charge amounts per quarter. Data is displayed in a grid and includes the following columns:

Service

Displays the service name that the IT manager owns. Click a service name to access the Service Dashboard.

Cost

Displays the total cost for a service.

Charges

Displays the amount charged for delivery of the service.

Variance

Displays the difference between cost and charges.

Variance%

Displays the variance amount expressed as a percentage of cost.

Status

Displays the status indicated by the following stoplights:

- Red. The variance is <20 percent.
- Yellow. The variance is <5 percent.
- Green. No red or yellow stoplight values.