



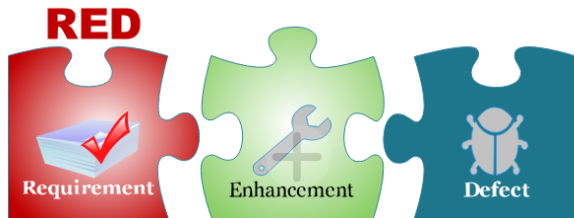
RED ESSENTIALS MAPP V2.0

PRESENTED BY: STRATACOM

RED ESSENTIALS MAPP V2.0

WHY RED?

It's simple, really. RED is an acronym for **R**equirements, **E**nhancements and **D**efects.



RED Essentials is a perfect add-on to the Cherwell Suite. RED allows you to track Requirements, Enhancements and Defects in a separate module. There is no more trying to force these type of records into Change or Incident Management, or filter them out. Best of all, you can track the progress of your projects and manage the momentum.

RED Essentials has all the components to get you started. RED Essentials can be a compliment to other tracking tools like JIRA.

WHAT THE MAPP INCLUDES AND DOES NOT INCLUDE

- New major RED Tracker Object
- New Supporting REDTracker links CI's join table
- New Supporting RED Testing Checklist
- New RED Project Table (Lookup)
- New RED Category Table (Lookup)
- New RED Tracker Status (Lookup)
- RED Tracker is fully integrated with Change, Incident
- RED Tracker features the ability to have approvals as well
- Dashboards included to help you use RED
- Portal interface for RED
- Does not include integration to other 3rd party tools outside of Cherwell
- Includes sample data in the Category and Project tables

APPLYING THE RED ESSENTIALS MAPP

The mApp may be applied to any system, however, it is recommended to apply this first to an out of box system (or a copy of your development system).

This mApp installs the basic forms and workflow to use the Change Templates.

Always remember to make a backup of your system before applying any mApp.

STEP BY STEP

- Apply mApp
- Click Agree to accept the terms

- Click Next through each of the Screens until you reach the Finish button
- Click Finish
- Publish blueprint (being sure to scan the blueprint)

USING THE RED ESSENTIALS MAPP

POST INSTALL SETUP

RED ships with some sample data. You may want to add to this and extend this for your own system.

Tables which contain data you may want to modify:

- **REDCATEGORY** – The RED Category is the major improvement area for RED. This is not the same as Incident Category or Change Category.
- **REDPROJECT** - This allows you to manage simple one-off projects against RED. RED does not integrate nor replace the functionality of ITPT. Integrating with ITPT would be a simple enhancement.

UPDATE SECURITY

As always, you should confirm that each of the necessary security groups have access to the new tables and fields.

USING RED

RED is ready to use as soon as you deploy the mApp. Out of box, the RED Trackers use the same Professional Grey styling used throughout Cherwell. This makes navigating and using RED just like your other Cherwell modules.

You will thank yourself for getting all of your Requirements, Enhancements and Defects out of a spreadsheet and into something trackable.

CREATE A RED TRACKER RECORD

Use New from the toolbar and select RED Tracker. The RED form is displayed:

- Initially highlighted area provides fields for recording details, such as what is being asked for, details and when it is needed.
 - REDTYPE:** (Requirement, Enhancement, Defect, Gap in Requirements)
- The Classification area offers fields for the classification of the Request.

All the work is done in Step 2, from the classification of the request through the completion. The RED categorization allows you to categorize by internal Cherwell categorization and/or a categorization specific to RED

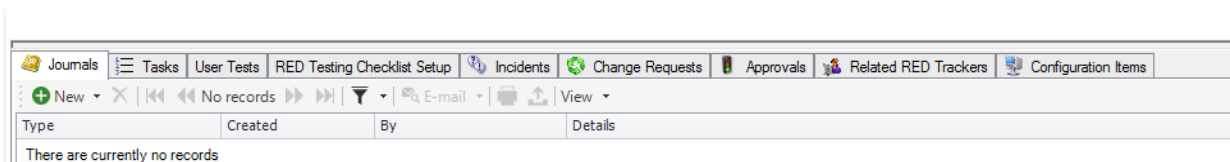
 - SERVICE:** (Cherwell Service)
 - CATEGORY:** (Cherwell Category)
 - SUBCATEGORY:** Cherwell Subcategory
 - RED CATEGORY:** Category specific to RED allows you to group and categorize per your needs

- **RED SUBCATEGORY:** Subcategory specific to RED allows you to group and categorize per your needs.
 - **+**: The + allows authorized users to dynamically create categorizations without leaving RED.
- Assign Backlog/Sprint pays attention to your agile implementation and allows you to select or dynamically assign your RED to a sprint.
 - **BACKLOG:** Agile Sprint to assign your RED to
- Estimation of your Cherwell ticket
 - **MASTER ITEM:** Allows for an item to be tracked at a higher level. This would enable the tracking a major RED items versus smaller ones.
 - **PRIORITY:** Just like other modules, we allow you to pick the impact, urgency and priority using a matrix
 - **RANKING:** Ranking allows requests of the same priority to be ranked. This allows for sub-prioritization when there are a lot of issues.
 - **WEIGHTING:** Weighting is used to count this item as less than 100% against the overall total. If this requirement is to add a field to Incident Management, you may not want to count this as the same weighting with an item to “Implement Change Management”.
 - **ESTIMATE TIME TO FIX:** What is the estimate (in hours) of how long this item will take to complete
 - **ACTUAL TIME TO FIX:** How long did it really take? (in hours)
 - **PERCENT COMPLETE:** Is it done yet?
- Assignment of the RED to Project, Releases, Teams and Suppliers
 - **DELIVERY TEAM:** Will this item be delivered by an internal team or an external team/supplier
 - **ESCALATE TO SUPPLIER/SUPPLIER FIELDS:** Enables the tracking of Supplier and vendor enhancements and tickets, right from your RED
- Progress allows you to track the status of this RED through all stages of its lifecycle.
 - **DEVELOPMENT STATUS:** Enables developers to classify the internal process of their RED

Typical of the Professional Grey template, the Left panel of the form tracks all the major details of the RED

WHAT ELSE DOES IT DO?

Like most Cherwell modules, RED integrates with Journals for History, Tasks, Incidents, Change Requests and Configuration Items.



RED supports Approvals and you can have managers or project leads approve work before it begins.

RED also supports a simple yet functional User Testing checklist. This allows to see what testing passed and maybe what needs to be re-tested again.

A sample checklist entry screen:

Red Testing Checklist

Owned By:

- select owner -

- select team -

Checklist Title

Test My Requirement

Enter Each Test desired below, one test per line

Test this

then this

and then this

Additional Testing Instructions:

Please test in order

Users are directed to test under the “I Want To” links

I want to:

[Close Requirement](#)

[Test This Requirement](#)

Red Testing Checklist

checklist 3

Created By: Cherwell Admin

Owned By:

Henri Bryce

[2nd Level Support](#)

[Go to Record](#)

Status:

<input type="text"/>	<input type="checkbox"/> test1
<input type="text"/>	<input type="checkbox"/> test2
<input type="text"/>	<input type="checkbox"/> test3
<input type="text"/>	<input type="checkbox"/> test4
<input type="text"/>	<input type="checkbox"/> test5

addition testing instructions 3

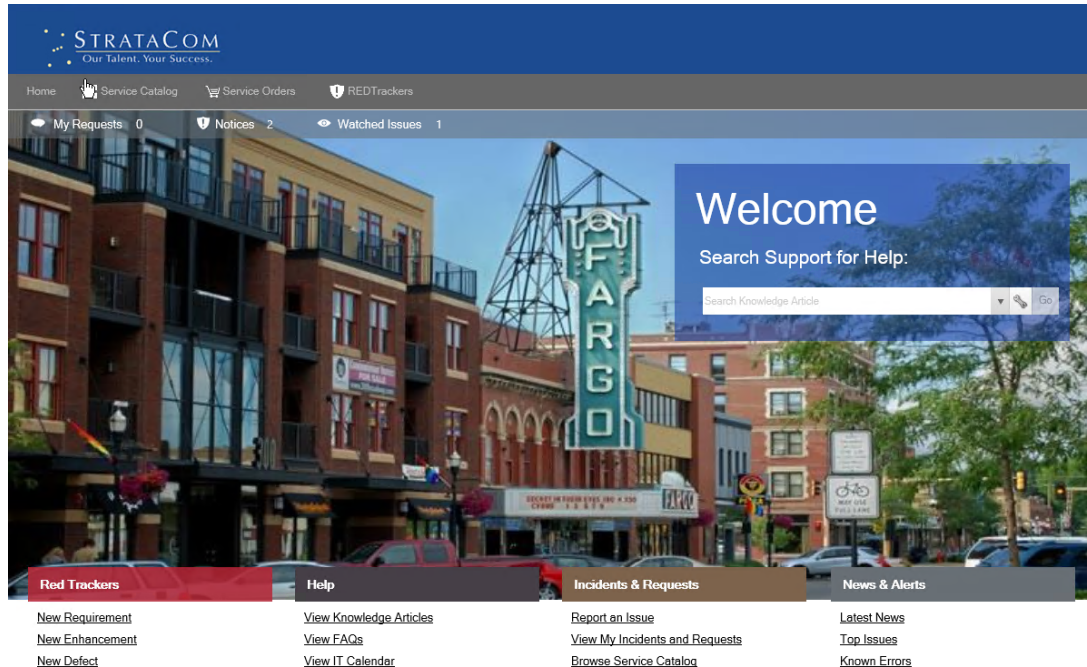
Submit

Don't forget to press Submit after testing is complete

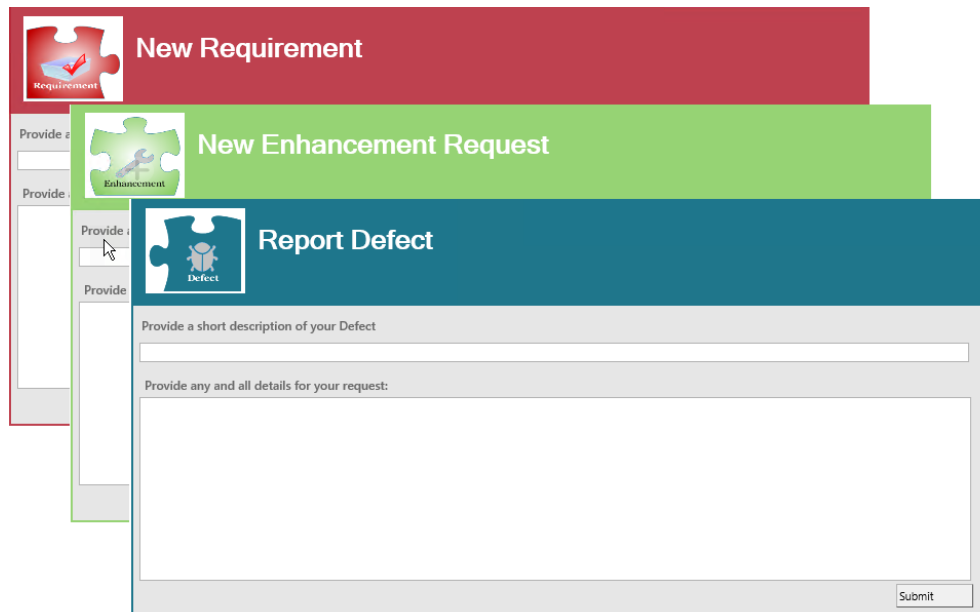
Users Can Pass or Fail each tested area and then press submit. The test will even be graded for percentage passed.

PORTAL SCREENS

You may want portal users to utilize RED too. The mApp contains a new custom site for RED exists to demo the RED tracker. These elements can be incorporated into your own portal.

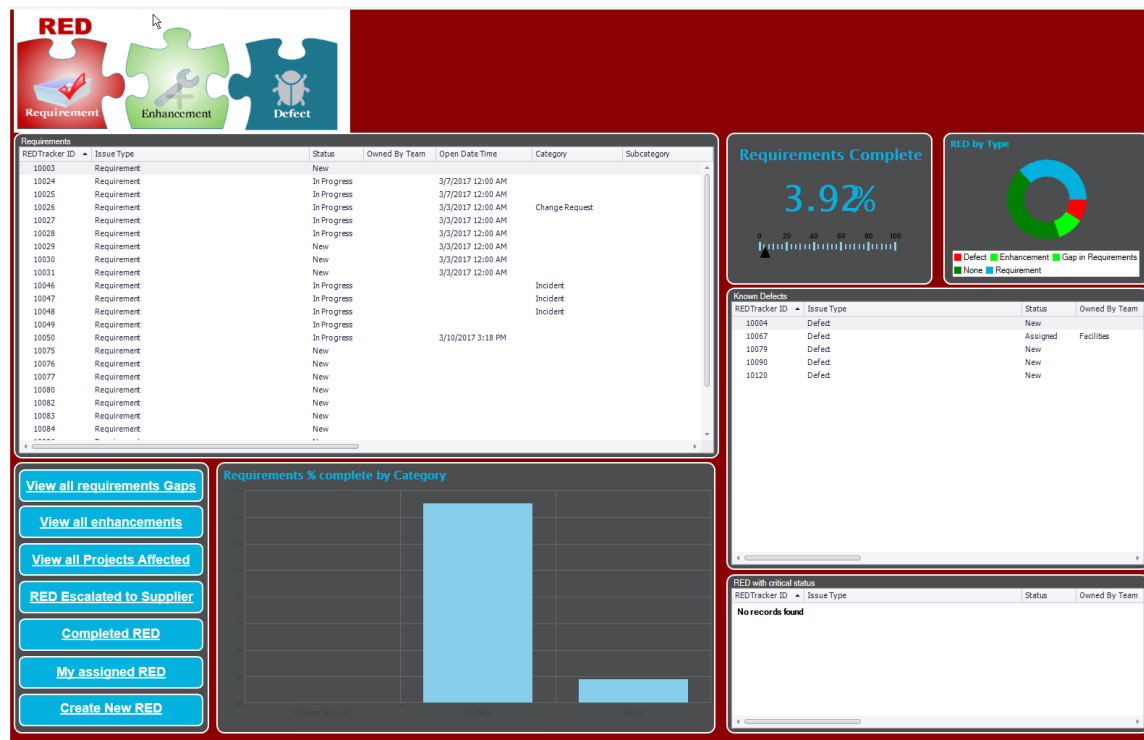
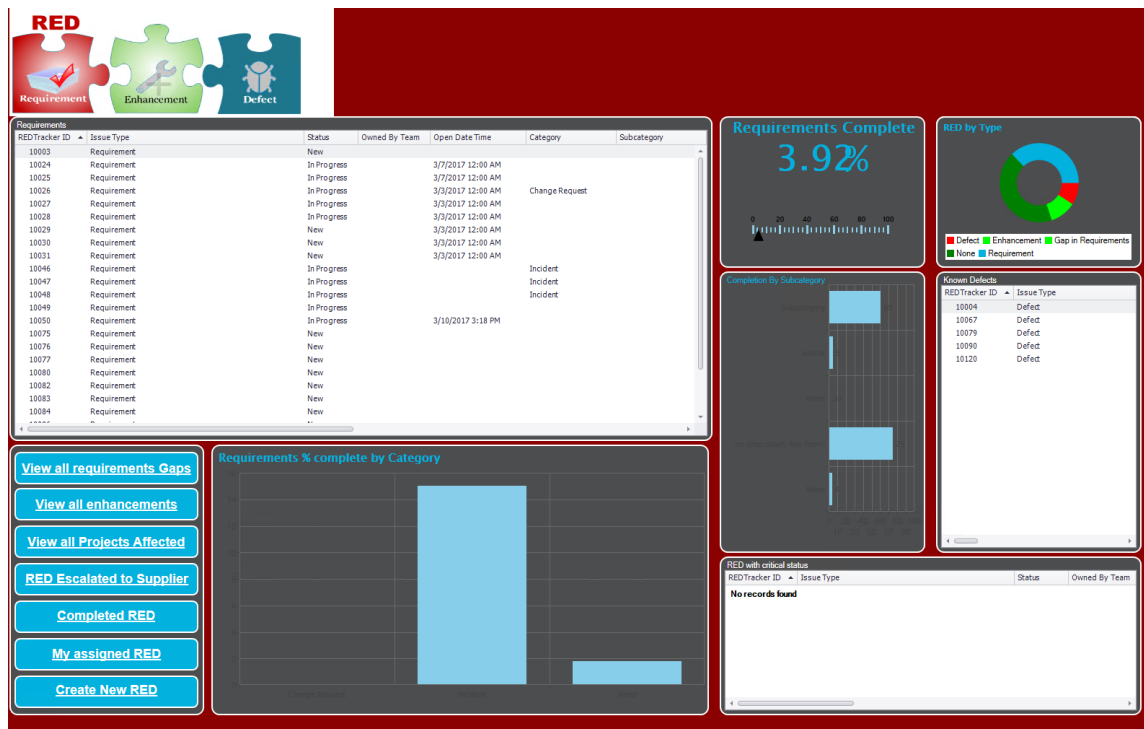


Creating a new RED shows the following screen depending on whether you are entering a Requirement, Enhancement or Defect

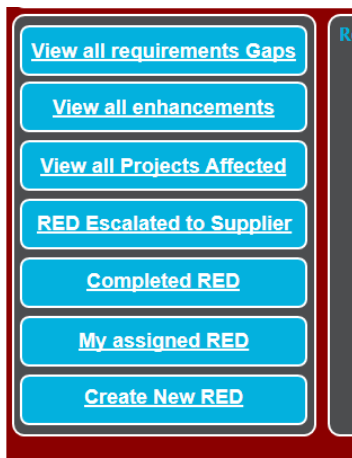


REPORTING AND CONSUMING RED TRACKERS

RED was built to utilize Dashboards to help you manage all of these requirements. We have incorporated two dashboards into the mApp to assist you.



The dashboards allow you to filter based on Project, Category, Subcategory or other criteria. At a glance, you can visualize how your project is progressing.

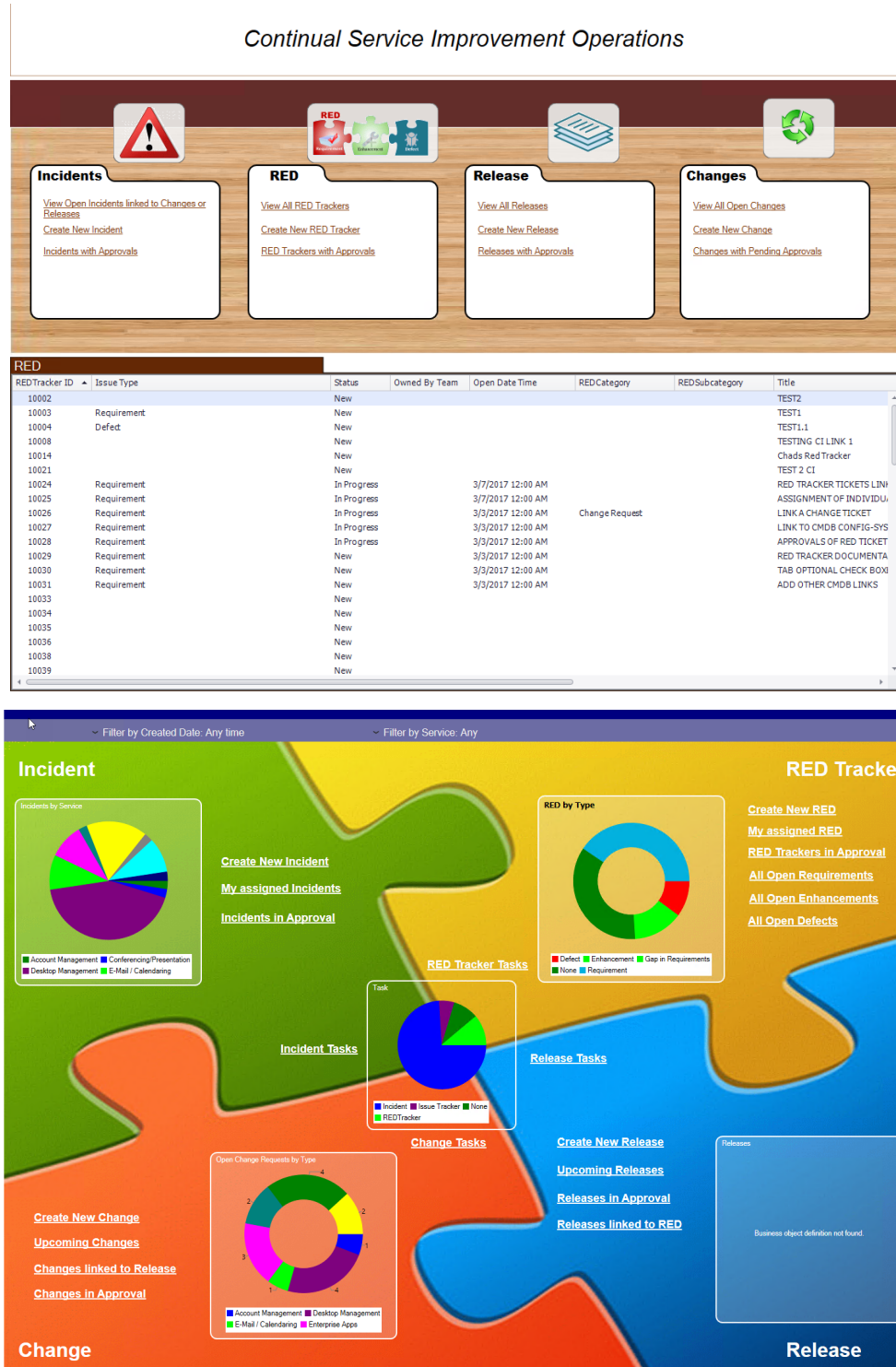


We’ve also included some buttons for quick access to functions you need everyday.

CONTINUAL SYSTEM IMPROVEMENT

We recognize that RED is the major component of Continual System Improvement. While RED is just a step in the process, it combines bits and pieces from all the other ITSM components.

To that end, we have included two dashboards out of box that represent where RED fits in.



Thank You for choosing the StrataCom RED Essentials mApp. We hope you find it adds value to your Cherwell solution. If you need additional training or support for this mApp please contact Laura Walker at lwalker@stratacominc.com