

RED ESSENTIALS MAPP V2.0

PRESENTED BY: STRATACOM

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WHY RED?

It's simple, really. RED is an acronym for Requirements, Enhancements and Defects.



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 Cl'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:

RED # 1014	2	Assess	Analysis	Approval	Design	Implement	Closed]
Status	New	Record the De	tails					Last Edited by
Completion:	Next: RED has been Accepted	Title: Description:				Repo	orted Date Time:	9/29/2017 5:06 PM
Completed Tests:	0.00%		O Requirement	O Enhancement	O Defect	O Gap in Require	ements	▼ Due Date:
Tasks:	0 of 0 Open 0.00% Complete	Classify				Assign Backlog Backlog		
Priority		Service Category Subcategory	:		> >	Estimate Priority:	:	Master Item
Requestor: Cherwell Admin	<u>5</u> 2	RED Categoi RED Subcategoi			v († v (†		g: ne to Fix/Implem timate: 0.0	Weighting: 0.00 ent (in hours) Actual: 0.0
Owned By:	Assign To	Assign						
<u>-Select a User-</u> -Select a Team-		Release Nam Release Win Start:	dow	End:		Delivery Te		Supplier Item
I want to:		Project Affecte	a:					
<u>Close</u>	Show all Tabs	Progress: Development Str % Comp						

- 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.
 - O 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.

ĺ	🥝 Journals	}∃ Tasks	User Tes	s RED Testing	Checklist Setup	🔌 Incidents	🔇 Change Reque	ts 🚦	Approvals	1	Related RED) Trackers	3	Configuration Items]
	🕀 New 👻	×100 -	📢 No reco	ords 🕪 👀 🤋	🍸 🛛 🖣 🔍 E-ma	i - 1 🗰 🔬	View 👻								
	Туре		Cre	ated	Ву		Details								
	There are cur	rently no re	cords												

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	Checklist Title
	Test My Requirement
Owned By:	Enter Each Test desired below, one test per line
<u>- select owner -</u>	· · · · · · · · · · · · · · · · · · ·
- select team -	Test this
	then this
	and then this
	Additional Testing Instructions:
	Please test in order

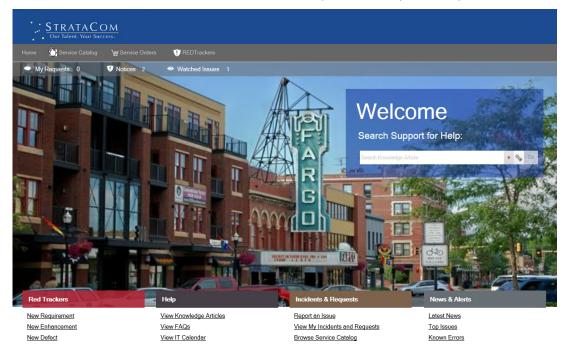
Users are directed to test under the "I Want To" links

l want to: <u>Close Requirem</u> <u>Test This Require</u>					
Red Testing Checklist checklist 3 Created By: Cherwell Admin Owned By: Henri Bryce 2nd Level Support Go to Record	Status:	test1 test2 test3 test4 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

Requirement	New Requirement	
Provide a Provide a Provide a	New Enhancement Request	
Provide	Report Defect	
	Provide a short description of your Defect	
	Provide any and all details for your request:	
		Submit

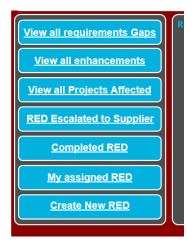
REPORTING AND CONSUMING RED TRACKERS

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.

RED								
Requirements REDTracker ID	. Janua Tuna	Status	Owned By Team	Open Date Time	Category	Subcategory	Requirements Complete	RED by Type
10003	Requirement	New	Owned by Team	open bate nine	category	Subcategoly		
10003	Requirement	In Progress		3/7/2017 12:00 AM		0.	3.92%	
10025	Requirement	In Progress		3/7/2017 12:00 AM			3.340	
10026	Requirement	In Progress		3/3/2017 12:00 AM	Change Request			
10027	Requirement	In Progress		3/3/2017 12:00 AM				
10028	Requirement	In Progress		3/3/2017 12:00 AM			0 20 40 60 80 100	
10029	Requirement	New		3/3/2017 12:00 AM			0 20 40 60 80 100 	
10030	Requirement	New		3/3/2017 12:00 AM			-	Defect Enhancement Gap in Requirements
10031	Requirement	New		3/3/2017 12:00 AM				None Requirement
10046	Requirement	In Progress			Incident		Completion By Subcategory	Known Defects
10047 10048	Requirement Requirement	In Progress In Progress			Incident		Completion by Subcategory	REDTracker ID A Issue Type
10049	Requirement	In Progress			Incruenc		Subastanan (S)	10004 Defect
10050	Requirement	In Progress		3/10/2017 3:18 PM			subconcipory of	10067 Defect
10075	Requirement	New		0,10,001 010 010				10079 Defect
10076	Requirement	New						10090 Defect
10077	Requirement	New					subcat 5	10120 Defect
10080	Requirement	New				0		
10082	Requirement	New						
10083	Requirement	New					None .57	
10084	Requirement	New				-		
- C								
View al	equirements Gaps I enhancements Projects Affected	% comple	te by Catego	ну				
	alated to Supplier						RED with critical status REDTracker ID A Issue Type No records found	Status Owned By Team
<u>My</u> a	Issigned RED							
Cre	ate New RED	inge Request		Incident		None		

Requirem	Deces	efect						
Requirements REDTracker ID	Issue Type	Status	Owned By Team	Open Date Time	Category	Subcategory	Requirements Complete	RED by Type
10003	Requirement	New	office by reali	open oute nine	coregoly		Requirements Complete	
10024	Requirement	In Progress		3/7/2017 12:00 AM		0		
10025	Requirement	In Progress		3/7/2017 12:00 AM			3.92%	
10026	Requirement	In Progress		3/3/2017 12:00 AM	Change Request		J. 94/0	
10027	Requirement	In Progress		3/3/2017 12:00 AM				
10028	Requirement	In Progress		3/3/2017 12:00 AM			0 20 40 60 80 100	
10029	Requirement	New		3/3/2017 12:00 AM			0 20 40 60 80 100 	
10030	Requirement	New		3/3/2017 12:00 AM			-	Defect Enhancement Gap in Requirements
10031	Requirement	New		3/3/2017 12:00 AM			l	None Requirement
10046	Requirement	In Progress			Incident		Known Defects	
10047	Requirement	In Progress			Incident		REDTracker ID Issue Type	Status Owned By Team
10048 10049	Requirement Requirement	In Progress			Incident		10004 Defect	New
10049	Requirement	In Progress In Progress		3/10/2017 3:18 PM			10007 Defect	Assigned Facilities
10030	Requirement	New		5/10/2017 5:16 PM			10079 Defect	New
10076	Requirement	New					10090 Defect	New
10077	Requirement	New					10120 Defect	New
10080	Requirement	New				U		
10082	Requirement	New						
10083	Requirement	New						
10084	Requirement	New						
1						, · ·		
View a	equirements Gaps Il enhancements Projects Affected	ents % comple	ete by Catego	ыу			،	
	related to Supplier mpleted RED assigned RED						RED make the development of the second secon	Status Owned By Team
Cre	ate New RED	Otanga Relaction		(CALC)		None	•	Þ

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.

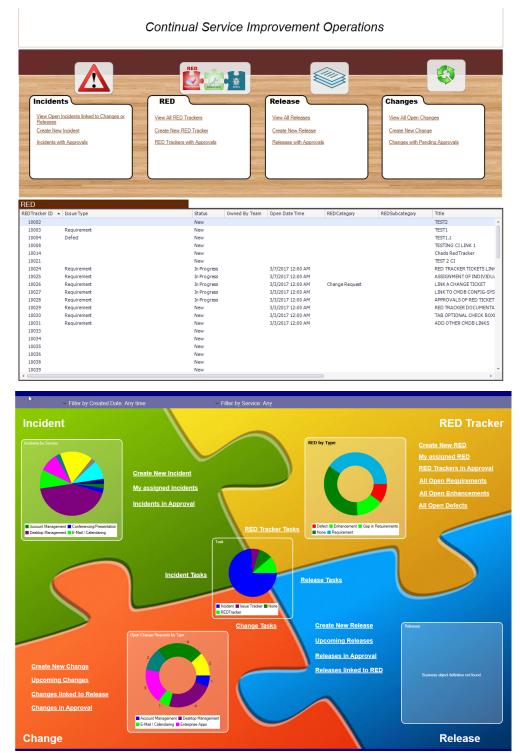


We've also included some buttons for quick access to functions you need everyday.

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