

CA Agile Central Value to CA PPM Customers



Rally Highlights

- ▶ Unlike other team-level agile solutions, Rally has **proven expertise** in scaling agile concepts to deliver true business outcomes. We call it **Enterprise Scale Agile**.
- ▶ **Enterprise Scale Agile** requires skillful coordination of agile teams to deliver business value.
- ▶ Rally's unfair advantage is its **combination of transformation consultants and scalable agile platform**. No other Agile vendors provide both, and both are required for success.
- ▶ Rally has the largest number of **SAFe SPCs** and is the only agile vendor to contribute **expertise** to SAFe.

What CA PPM Customers Can Gain From Rally



Higher predictability, productivity, and time to market of software development resulting in higher collaboration between Business & IT



Proven agile results resulting in significant improvements of software development operational excellence



Visibility into agile delivery enabling PMOs to track cost, resources, real-time progress and business deliverables of agile work



Financial governance of agile projects and increased software capitalization resulting in better investment decisions, staff retention and increased tax savings

CA PPM Customer Challenges Addressed by Rally

Agile projects not connected to portfolio governance

- No traceability between funding and benefits delivered
- Lack of visibility into resources and cost of agile teams
- Lack of visibility into value delivered by agile teams
- Capitalization rules dismissive of agile work

NEGATIVE IMPACT

- Inability to track benefit realization
- Sub-optimal investment decision making
- Lack of trust between Business and IT
- Under-capitalization of software assets

Suboptimal agile adoption

- No team coordination to deliver true business outcomes
- Delivery status captured via manual Excel updates
- No business involvement in agile planning
- No tie to business commitments

NEGATIVE IMPACT

- Limited business impact of agile development
- Wasteful and time-consuming project reporting
- Agile teams disconnected from business needs
- No predictability in software delivery

CA (CA PPM + Rally) Solution To These Challenges

Agile delivery connected to portfolio governance

- Tight connection between funding and agile projects
- Clear visibility into cost and resources of agile projects
- Clear visibility into business deliverables
- Capitalization rules inclusive of agile work

POSITIVE IMPACT

- Derive maximum value from available budget and resources
- Fund innovation yet maintain budget levels and overall spend
- Early feedback loop to assess best time to market
- Optimize capitalization returns

Agile adoption leading to proven business results

- Expert coaching on proven agile at scale techniques
- Real-time status reporting for business stakeholders
- Strong business participation in agile delivery plans
- Quarterly business commitments

POSITIVE IMPACT

- Save time adopting agile effectively
- Early feedback loop to kill or accelerate projects
- Smarter investment decisions
- Predictability of agile delivery in support of business needs

How We Do It

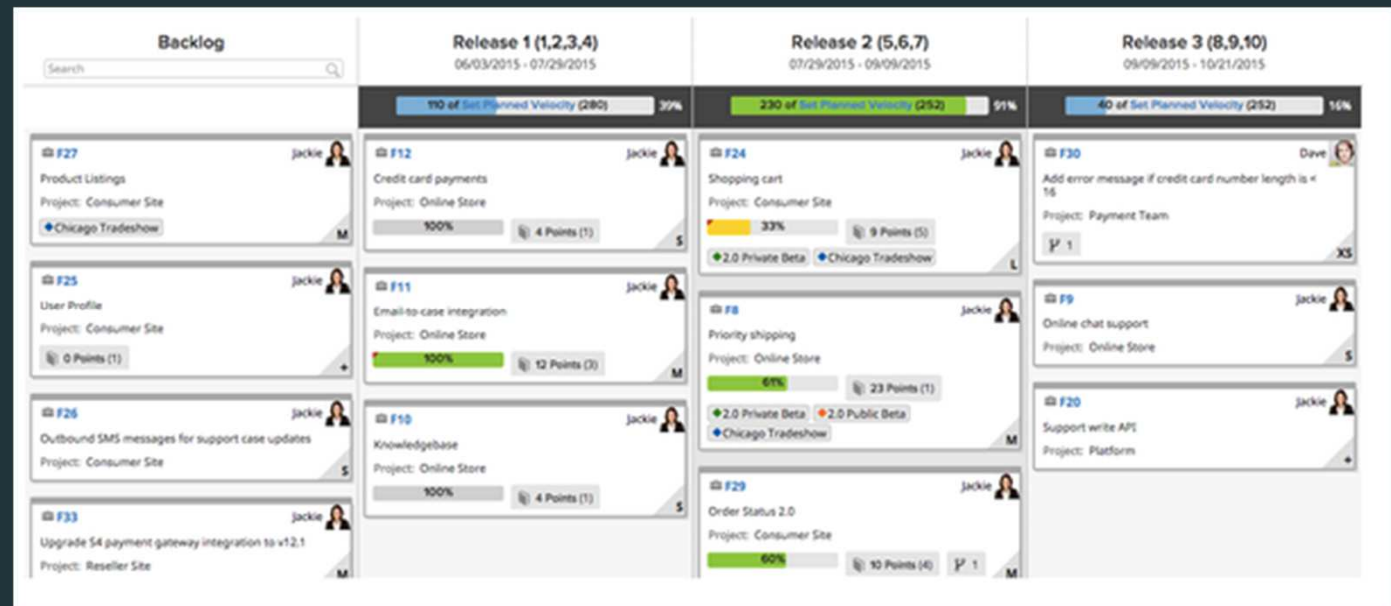
Rally's proven approach (Ready Sync Go) combines transformation consulting, training, coaching and an enterprise-class agile platform for full visibility to increase time to market and predictability of business deliverables

Agree on
business deliverables

Focus work on
what matters most

Continuous planning
cadence

Real-time
progress visibility



Ready Sync Go: Rally's Proven Approach to Scaling Agile



Prep event
Work Capacity Planning

During event
Team Planning

Post event
Release Tracking

BIG ROOM PLANNING / RELEASE PLANNING
is the essence of Enterprise Scale Agile

Coordinating teams to achieve

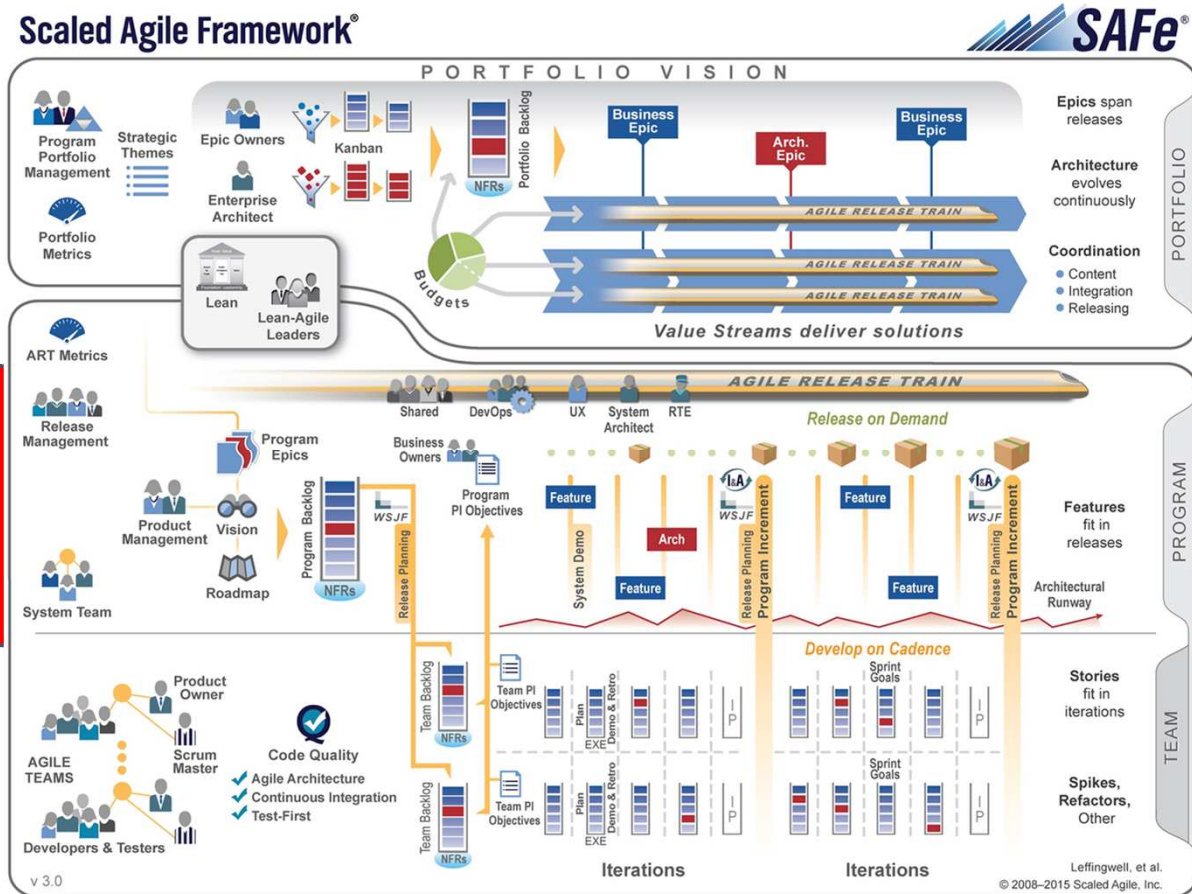
- Realistic Plans
- Optimum Business Value
- Shared Commitment
- Early Detection of Risks & Dependencies
- Alignment

Leading to

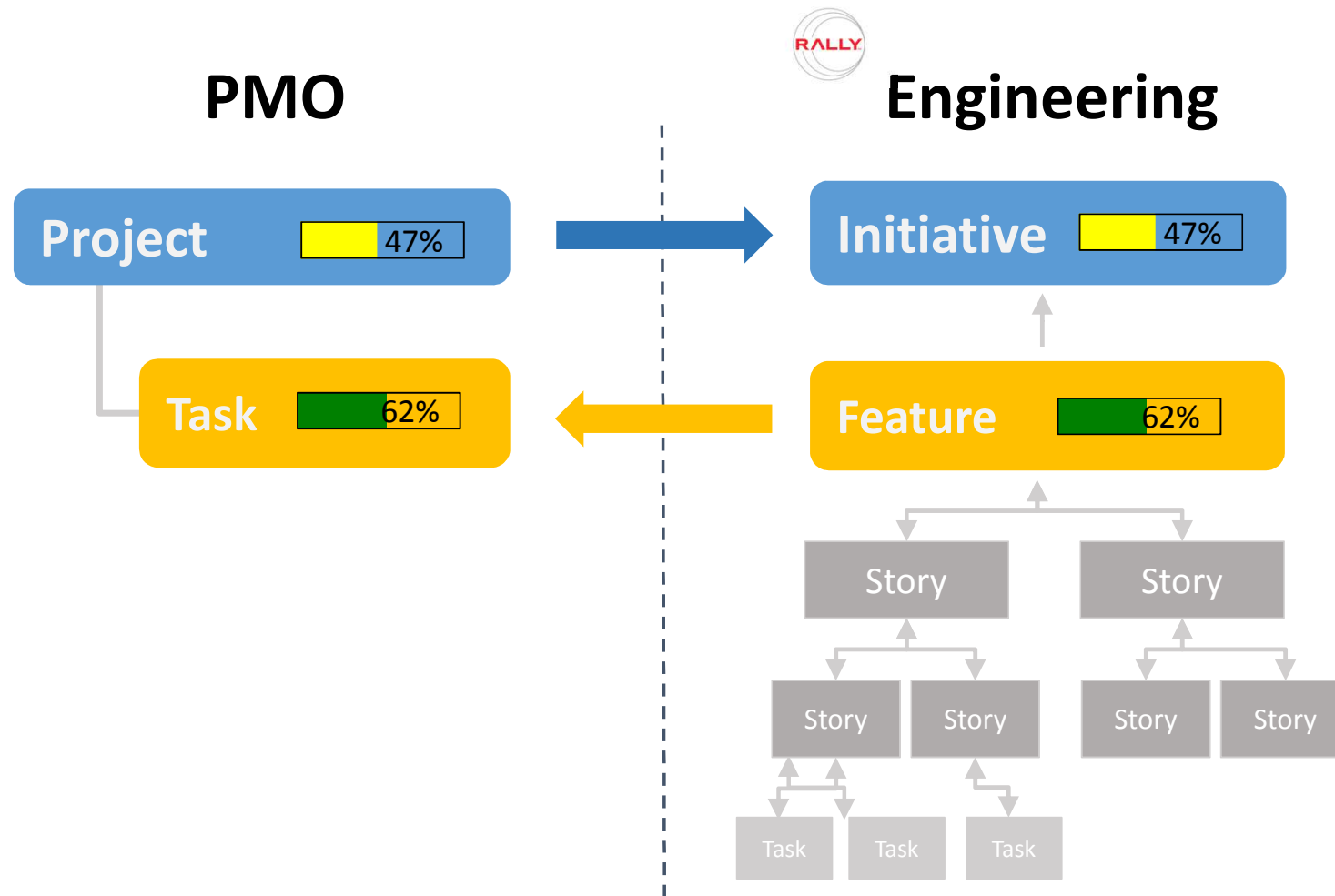
- Quarterly Predictability
- Higher Team Productivity
- Faster Time to Market

Enterprise Scale Agile

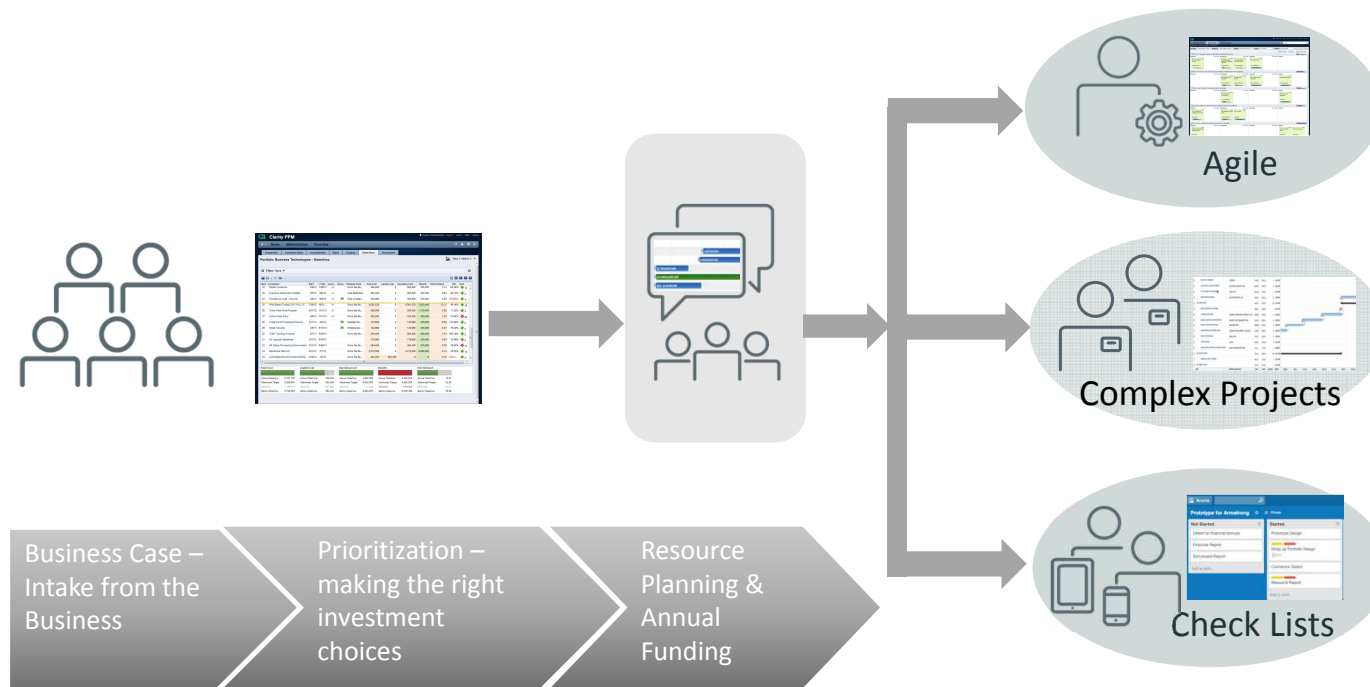
Program-Level connects User Stories to the Portfolio as User Stories are Way too Noisy for PPM users



CA PPM / CA Agile Central Integration (Phase 1)



Integrated Planning Regardless of Execution Mode



- Prioritization and funding is very relevant in the enterprise... and CA PPM is valued for this
- Traditional work execution is changing – bi-modal (more adaptive processes)



Demo

CA PPM Jaspersoft Reporting



CA PPM Jaspersoft Reporting

PROVIDES A SIMPLE YET POWERFUL EXPERIENCE FOR THE END USER



Self Service Reporting

- No steep learning curve
- Easy access to information
- Highly Interactive with Drag and Drop
- Powerful Visualization

Seamless Experience

- Custom Attributes are available for reporting
- Leverages CA PPM Security model

Flexible Consumption

- Automated Scheduling with Email delivery options
- Export options include PDF, PPTX, XLS, XLSX, CSV, DOCX, RTF, ODS, ODT

Jaspersoft Ad Hoc View - Table

Library View Manage Create

Domain: Investment Mana...

Fields

- Investments
 - Investment Name
 - Investment ID
 - Investment Type
 - Description
 - Investment Manager
 - Start Date
 - Finish Date
 - General
 - OBS
 - Portfolio
 - Program
 - Team
 - Financial

Measures

- Investments
 - Custom
 - General
 - Portfolio
 - Team
 - Investment Totals
 - Weekly Periods
 - Calendar Periods
 - Fiscal Periods
 - Spacer

Columns: Spacer * Project Name * Start Date * Finish Date * Total Allocated Hours *

Groups: Investment Manager *

Project Allocations by Manager

	Project Name	Start Date	Finish Date	Total Allocated Hours
Berks, Paul				
	Order Trending Analysis	Oct 1, 2014	Jan 22, 2015	1,616.00
	Email SAN Storage Implementation	Nov 1, 2014	Feb 23, 2015	1,016.00
	Automated Security Enhancements	Nov 1, 2014	Feb 16, 2015	1,680.00
	Credit Card Processing Enhancement	Nov 1, 2014	Feb 9, 2015	2,840.00
	Executive Dashboard Visibility	Oct 1, 2014	Feb 1, 2015	1,952.00
	Financial Workflow Development	Dec 1, 2014	Feb 28, 2015	0.00
Berks, Paul Totals	6			9,104.00
Martin, Paul				
	Data Warehouse Performance Tuning	Oct 1, 2014	Feb 13, 2015	1,968.00
	Online Order Performance Improvements	Oct 1, 2014	Jan 22, 2015	1,616.00
	Client Services Datamart	Oct 1, 2014	Feb 9, 2015	1,992.00
	Financial Process Audit	Nov 1, 2014	Feb 23, 2015	1,616.00
	eCommerce Portal	Aug 1, 2014	Mar 11, 2015	2,084.00
	Online Order Catalog	Oct 1, 2014	Dec 12, 2014	1,720.00
Martin, Paul Totals	6			10,996.00
	12			20,100.00

Filters

A.Investment Type equals

Project

B.Investment Mana... is one of

Click to select items...

Berks, Paul *

Martin, Paul *

Custom Filter Expression

Apply

Jaspersoft Ad Hoc Report – Table

– + 100%
search report
Back
Save
Print
Refresh
Help

Risks by Project				
Risk Name	Risk Category	Risk Status	Risk Target Resolution Date	
Client Services Datamart				Formatting...
Sponsorship risk	Sponsorship	Open	12/26/14	High
Data Warehouse Performance Tuning				Hide column
Base Architecture	Implementation	Open	12/4/14	Medium
Development vs. Production environment	Supportability	Open	1/2/15	Medium
eCommerce Portal				
Sponsorship Risk	Sponsorship	Open	12/8/14	Medium
Email SAN Storage Implementation				
Disaster recovery of new infrastructure	Objectives	Open	3/6/14	Low
Learning New technology	Organizational Culture	Open	2/18/14	Low
SAN Ownership, care and feeding	Organizational Culture	Open	3/12/14	Low
Financial Process Audit				
New External Auditors	Flexibility	Open	11/14/14	Medium
Updates to SOX regulations	Objectives	Open	11/28/14	Medium
Financial Workflow Development				
Finance has many silos	Interdependencies	Open	3/23/14	High
New upgrade to expense system	Interdependencies	Open	3/11/14	Low

Jaspersoft Ad Hoc Report – Table Formatting Options

Format column: Risk Priority

Basic Formatting

Conditional Formatting

Apply to:

Headings

Heading text:

Risk Priority

Font:

Arial

Extension fonts

Ca-Font
DejaVu Sans
DejaVu Sans Mono
DejaVu Serif
Monospaced

Size:

11

6

7

8

9

10

11

Style:

B *I* U

Color:

Alignment:

< Previous Column

Next Column >

Format column: Risk Priority




Basic Formatting

Conditional Formatting

Apply to:

Detail Rows

Conditions List

#	Operator	Condition	Format		
1	Equals	High	B <i>I</i> <u>U</u>  A	▲ ▼	✕
2	Equals	Medium	B <i>I</i> <u>U</u>  A	▲ ▼	✕
3	Equals	Low	B <i>I</i> <u>U</u>  A	▲ ▼	✕
Add					

< Previous Column

Next Column >

OK

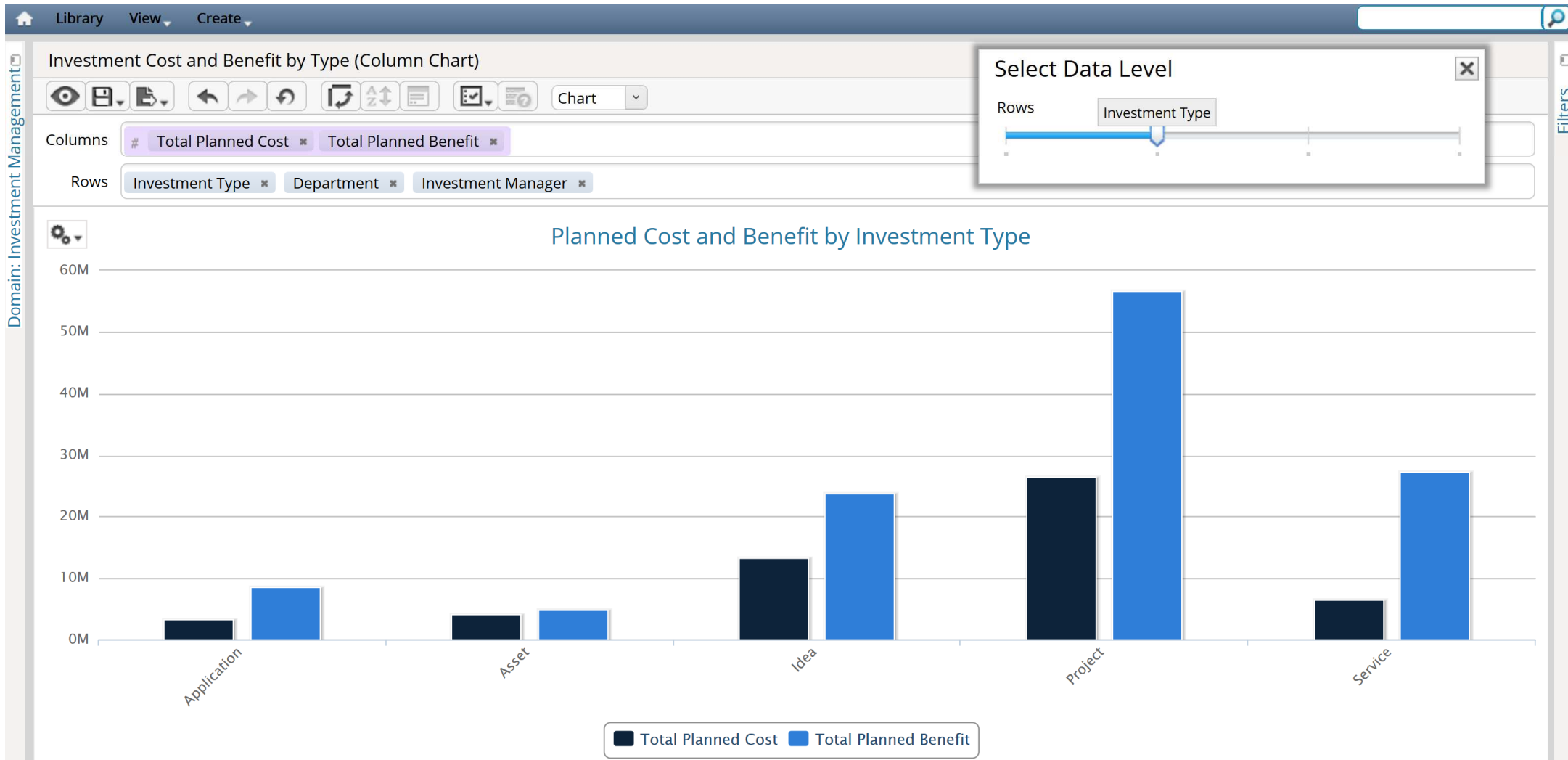
Cancel

Jaspersoft Ad Hoc View – Cross Tab

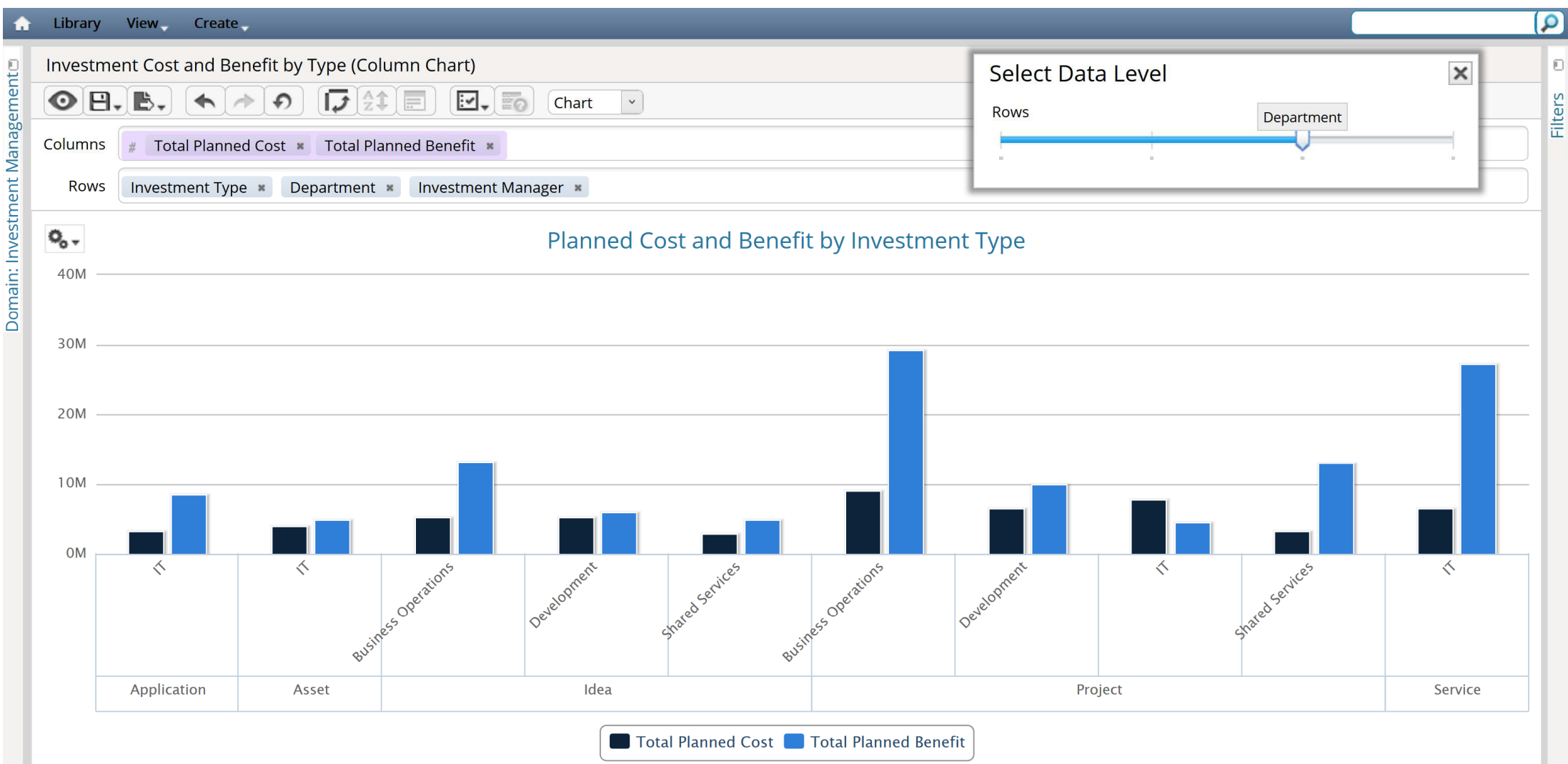
Financial Planned vs. Forecast Cost by Period

⊕ Fiscal Year			⊖ 2014					⊕ 2015	⊕ 2016	Totals
Fiscal Quarter			2014-Q1	2014-Q2	2014-Q3	2014-Q4	Totals	Totals	Totals	Totals
⊕ Cost Type	Transaction Class	Measures								
⊖ Capital	External Labor	Plan Cost			\$89,000	\$939,240	\$1,028,240	\$2,041,580	\$34,720	\$3,104,540
		Forecast Cost			\$0	\$939,240	\$939,240	\$2,041,580	\$34,720	\$3,015,540
		Plan and Forecast Cost Variance			\$89,000	\$0	\$89,000	\$0	\$0	\$89,000
	Internal Labor	Plan Cost		\$20,000	\$520,120	\$2,269,307	\$2,809,427	\$3,379,893	\$26,640	\$6,215,960
		Forecast Cost		\$0	\$0	\$2,269,307	\$2,269,307	\$3,379,893	\$26,640	\$5,675,840
		Plan and Forecast Cost Variance		\$20,000	\$520,120	\$0	\$540,120	\$0	\$0	\$540,120
	Totals	Plan Cost		\$20,000	\$609,120	\$3,208,547	\$3,837,667	\$5,421,473	\$61,360	\$9,320,500
		Forecast Cost		\$0	\$0	\$3,208,547	\$3,208,547	\$5,421,473	\$61,360	\$8,691,380
		Plan and Forecast Cost Variance		\$20,000	\$609,120	\$0	\$629,120	\$0	\$0	\$629,120
⊖ Operating	External Labor	Plan Cost	\$24,192	\$156,950	\$277,772	\$996,228	\$1,455,142	\$1,563,932	\$201,472	\$3,220,546
		Forecast Cost	\$0	\$0	\$0	\$996,228	\$996,228	\$1,563,932	\$201,472	\$2,761,632
		Plan and Forecast Cost Variance	\$24,192	\$156,950	\$277,772	\$0	\$458,914	\$0	\$0	\$458,914
	Internal Labor	Plan Cost	\$66,024	\$322,044	\$831,832	\$3,381,125	\$4,601,025	\$4,019,561	\$381,552	\$9,002,138
		Forecast Cost	\$0	\$0	\$0	\$3,381,125	\$3,381,125	\$4,019,561	\$381,552	\$7,782,238
		Plan and Forecast Cost Variance	\$66,024	\$322,044	\$831,832	\$0	\$1,219,900	\$0	\$0	\$1,219,900
	License Costs	Plan Cost			\$55,000	\$150,000	\$205,000	\$150,000	\$10,000	\$365,000
		Forecast Cost			\$0	\$150,000	\$150,000	\$150,000	\$10,000	\$310,000
		Plan and Forecast Cost Variance			\$55,000	\$0	\$55,000	\$0	\$0	\$55,000
	Totals	Plan Cost	\$90,216	\$478,994	\$1,164,604	\$4,527,353	\$6,261,167	\$5,733,493	\$593,024	\$12,587,684
		Forecast Cost	\$0	\$0	\$0	\$4,527,353	\$4,527,353	\$5,733,493	\$593,024	\$10,853,870
		Plan and Forecast Cost Variance	\$90,216	\$478,994	\$1,164,604	\$0	\$1,733,814	\$0	\$0	\$1,733,814
Totals	Totals	Plan Cost	\$90,216	\$498,994	\$1,773,724	\$7,735,900	\$10,098,834	\$11,154,966	\$654,384	\$21,908,184
		Forecast Cost	\$0	\$0	\$0	\$7,735,900	\$7,735,900	\$11,154,966	\$654,384	\$19,545,250
		Plan and Forecast Cost Variance	\$90,216	\$498,994	\$1,773,724	\$0	\$2,362,934	\$0	\$0	\$2,362,934

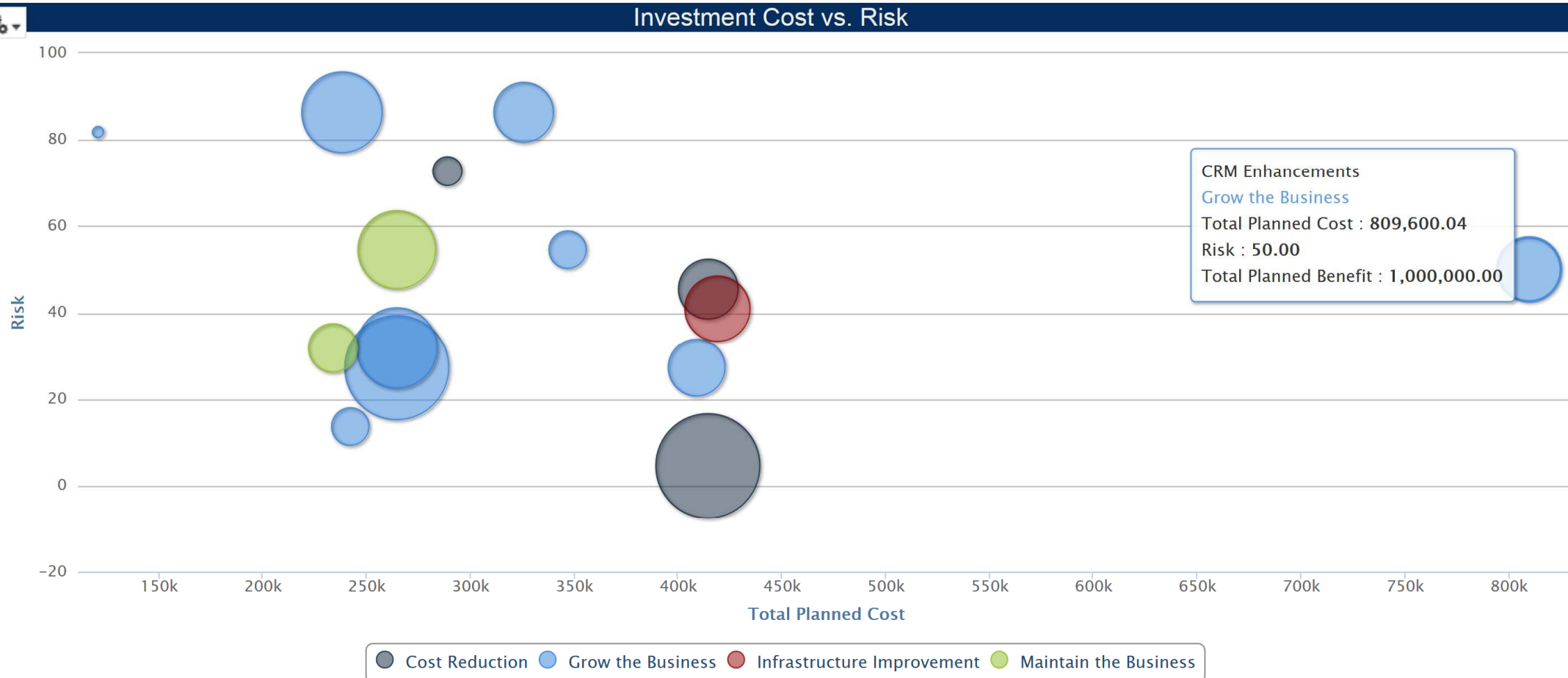
Jaspersoft Ad Hoc View – Chart (Data Level Row Slider)



Jaspersoft Ad Hoc View – Chart (Data Level Row Slider)



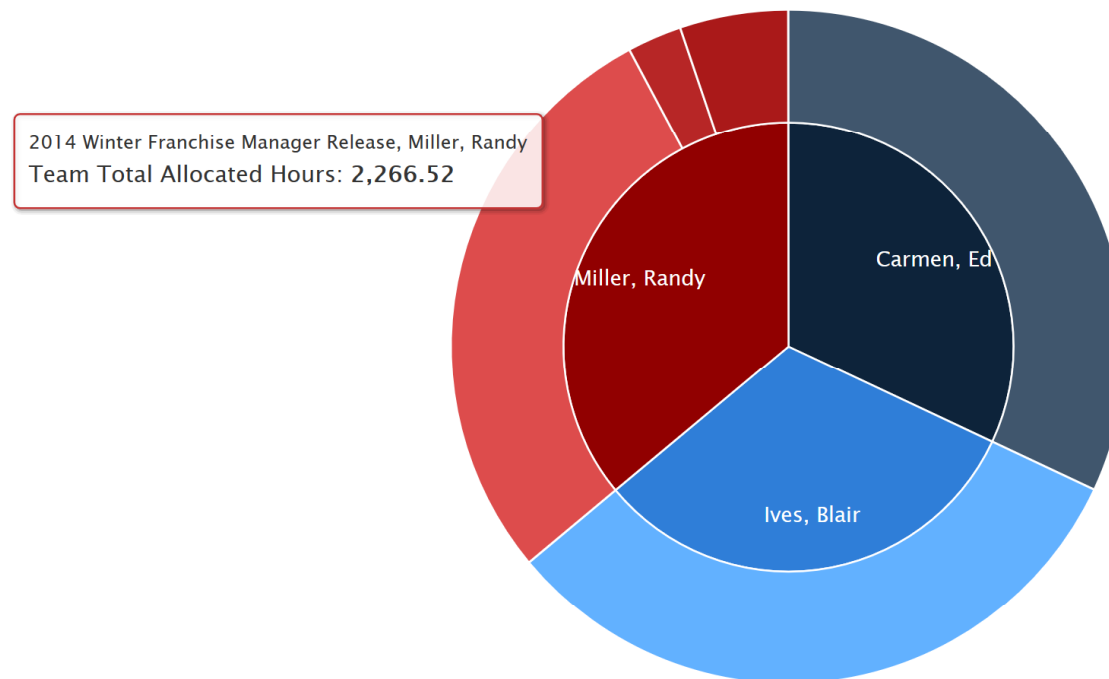
Jaspersoft Ad Hoc Report – Bubble Chart



Jaspersoft Ad Hoc Report – Dual Level Pie Chart



Resource Allocation Total by Investment



■ 2014 Winter Franchise Manager Release, Carmen, Ed ■ 2014 Winter Franchise Manager Release, Ives, Blair ■ 2014 Winter Franchise Manager Release, Miller, Randy
■ Global Expense, Miller, Randy ■ SAP R/3 Financial, Miller, Randy

Jaspersoft Studio Report – Project Storyboard

Options

Business Technologies

Project OBS Type

Organizational

Project OBS Unit

All Groups | Business Technologies

Project Manager

Click to select items...

Granger, Paula | paulaGranger

Martin, Paul | paulMartin

Paxton, Robyn | robynPaxton

Riviera, Alex | alexRiviera

Project

Click to select items...

* Project Status

Click to select items...

Submitted for Approval

Unapproved

Approved

Work Status

Click to select items...

Phase Start Date

2014-10-31

* Financial Plan Type

Planned

Include Inactive Projects?

Apply

Reset

Remove

Project Storyboard

Data refreshed Nov 8, 2014 at 11:03:55 PM

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100%

search report

Back

As PDF

As Excel (Paginated)

As Excel

As CSV

As DOCX

As RTF

As ODT

As ODS

As XLSX (Paginated)

As XLSX

As PPTX

Project Storyboard: eCommerce Portal

Project Manager

Martin, Paul

Status Report Date

10/17/2014

Project Type

Major Project

Status

Approved

Stage

Building

Progress

Started

Project Dates

Start

Finish

Plan

8/29/2014

4/30/2015

Baseline

8/4/2014

3/11/2015

Days Late

50

50

Status Report Indicators

Overall

Schedule

Scope

Cost and Effort

Labor Hours

Baseline

2,156.00

Actuals

268.00

Estimate To Complete

2,008.00

Estimate At Completion

2,276.00

EAC to Baseline Variance

120.00

Remaining Allocation

1,740.00

Allocation to ETC Variance

0.00

Financial Performance

Planned Benefit

2,700.00

Planned Cost

4,000.00

Actual Cost

4,000.00

Estimate At Completion

4,000.00

EAC to Planned Variance

4,000.00

Planned ROI

4,000.00

Planned Breakeven

4,000.00

Project Objective

Development of a new portal for all Online Client Services.

Key Accomplishments

Key Accomplishments for this week:

- Resource issues resolved
- User acceptance test plan approved
- End-to-end test plan approved
- Pre-briefs for the Monthly Project Review completed by all team members
- Online training solution chosen and team assembled

Status Report Update

Resource issues all resolved and development is proceeding.

There are some scope concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. However, before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.

Upcoming Activities

The following reviews are scheduled for next week:

- User acceptance test results
- Change Requests
- Monthly Project Review

The Configuration Control Board meeting is scheduled in two weeks.

Issues by Priority

Chart Types...

Low

High

Medium

Risks by Priority

Low

High

Medium

Current Issues

Issue	Priority	Status	Target Resolution	Owner
Requirements are unclear		Open	12/29/2014	Morris, Tom
System Architecture is non-compliant		Open	1/5/2015	Morris, Tom
Accept all possible popular pay methods		Open	1/19/2015	Martin, Paul
Critical resource is unavailable		Open	12/8/2014	Morris, Tom

Current Risks

Risk	Probability	Impact	Priority	Status	Target Resolution	Owner
Sponsorship Risk				Open	12/8/2014	Granger, Paula

Jaspersoft Studio Report – Export to PowerPoint

CSK_PRJ_ProjectStoryboard.pptx - PowerPoint

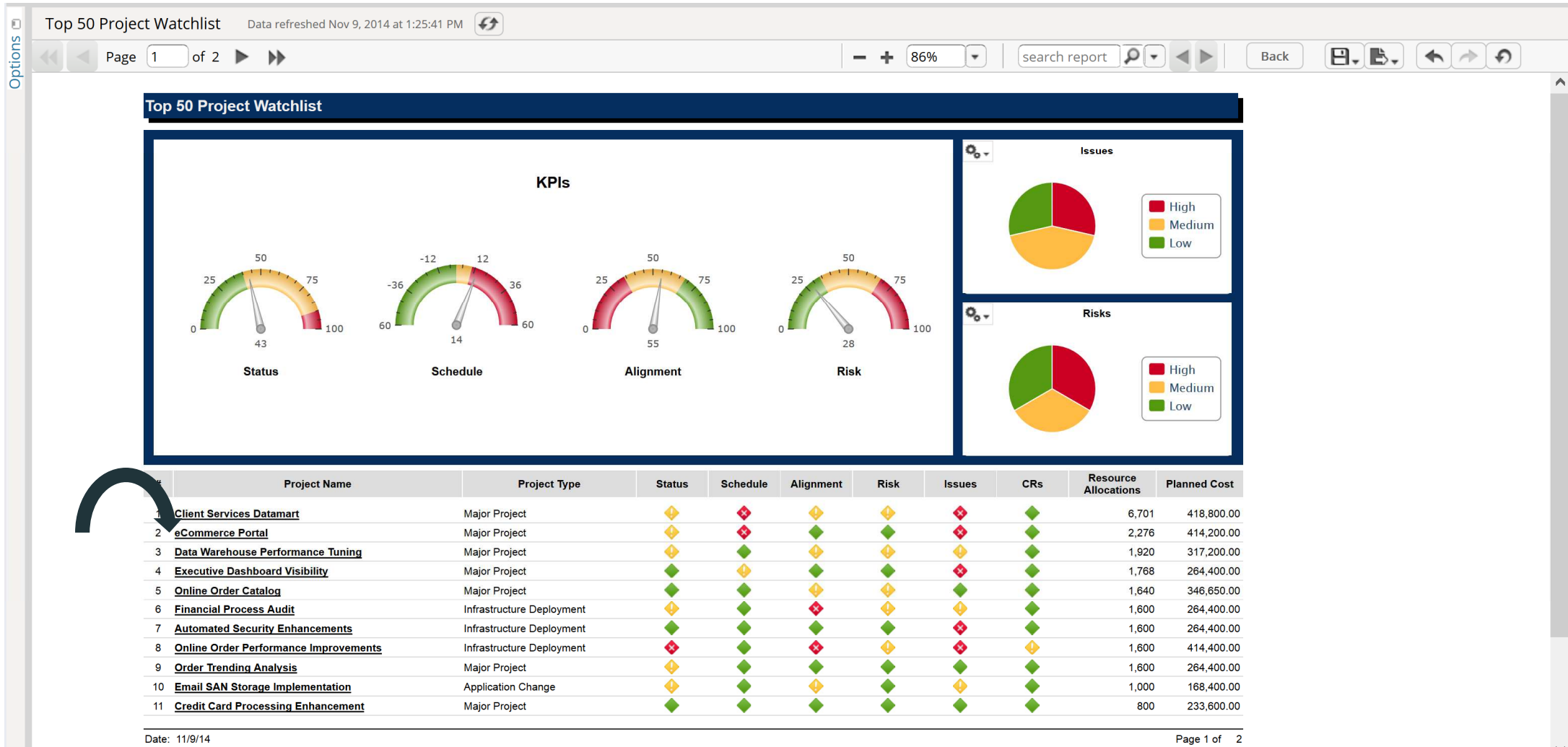
FILE HOME INSERT DESIGN TRANSITIONS ANIMATIONS SLIDE SHOW REVIEW VIEW ACROBAT **FORMAT** DRAWING TOOLS ? [Icons] - [Icons] X

Brown, Denice C

Project Storyboard: eCommerce Portal

Project Manager	Martin, Paul	Status Report Date	10/17/2014	Labor Hours		Financial Performance	
Project Type	Major Project	Status	Approved	Baseline	2,156.00	Planned Benefit	2,700,000.0
Stage	Building	Progress	Started	Actuals	268.00	Planned Cost	414,200.00
Project Dates				Status Report Indicators		Estimate To Complete	
	Start	Finish	Overall				
Plan	8/29/2014	4/30/2015	Schedule			Estimate At Completion	2,276.00
Baseline	8/4/2014	3/11/2015	Scope			EAC to Baseline Variance	120.00
Days Late	50	50	Cost and Effort			Remaining Allocation	1,740.00
						Allocation to ETC Variance	0.00
							Planned Benefit
							Planned Cost
							Actual Cost
							Estimate At Completion
							EAC to Planned Variance
							Planned ROI
							Planned Breakeven
Project Objective				Key Accomplishments			
Development of a new portal for all Online Client Services.				Key Accomplishments for this week:			
				<ul style="list-style-type: none"> - Resource issues resolved - User acceptance test plan approved - End-to-end test plan approved - Pre-briefs for the Monthly Project Review completed by all team members - Online training solution chosen and team assembled 			
Status Report Update				Upcoming Activities			
Resource issues all resolved and development is proceeding.				The following reviews are scheduled for next week:			
There are some scope concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. However, before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.				<ul style="list-style-type: none"> - User acceptance test results - Change Requests - Monthly Project Review 			
				The Configuration Control Board meeting is scheduled in two weeks.			

Jaspersoft Studio Report – Top 50 Project Watchlist



Jaspersoft Studio Report – Project Status Detail Drill Down

Options

Project OBS Type

Project OBS Unit

Project Manager

Project

* Project Status

Submitted for Approval

Unapproved

Approved

Work Status

* Amount Type

Project Status Detail

Data refreshed Nov 9, 2014 at 11:33:08 AM

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search report
Back

Project Status Detail: eCommerce Portal

Project ID	PR1002	Status Report Date	10/17/2014
Project Manager	Martin, Paul	Previous Report Date	9/15/2014

Project Type	Major Project	Status	Approved
Goal	Cost Reduction	Progress	Started

Stage
Building

Finish Date
4/30/2015

Baseline Finish Date
3/11/2015

Days Late
50

Baseline
2,156.00

Actuals
268.00

ETC
2,008.00

EAC
2,276.00

Projected Effort Variance
120.00

Projected Effort Variance %

Status Report Indicators
Overall
Schedule
Scope
Cost and Effort

Project Indicators
Schedule to Baseline
Alignment
Risk
Issue
Change

Status Report Update

Resource issues all resolved and development is proceeding.

There are some scope concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. However, before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.

Project Objective

Development of a new portal for all Online Client Services.

Project Team

Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Kingsley, Art	Architect	8/29/2014	8/20/2014	4/30/2015	2/23/2015	Soft	New	100.00	0.00	100.00
Morris, Tom	Architect	8/29/2014	8/20/2014	4/30/2015	3/4/2015	Soft	New	180.00	100.00	80.00
Goldman, Mark	Business Analyst	8/29/2014	8/20/2014	4/30/2015	3/11/2015	Soft	New	220.00	0.00	220.00
Hill, Wayne	Developer	8/29/2014	10/10/2014	4/30/2015	3/4/2015	Soft	New	540.00	0.00	540.00
Patel, Sanjay	Developer	8/29/2014	12/18/2014	4/30/2015	1/14/2015	Soft	New	160.00	0.00	160.00
Stoneburg, Sam	Network Engineer	8/29/2014	9/12/2014	4/30/2015	2/25/2015	Soft	New	240.00	40.00	200.00
Martin, Paul	Project Manager	8/29/2014	8/4/2014	4/30/2015	3/11/2015	Soft	New	208.00	128.00	80.00
Newburg, Mary	Storage Architect	8/29/2014	8/4/2014	4/30/2015	2/25/2015	Soft	New	288.00	0.00	288.00
Turner, Bruce	Test Engineer	8/29/2014	12/25/2014	4/30/2015	2/23/2015	Soft	New	340.00	0.00	340.00

Date: 11/9/14

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Jaspersoft Reports – Scheduling

LibraryViewCreate

New Schedule

ScheduleParametersOutput OptionsNotifications

Schedule For: /ca_ppm/reports/resource_management/CSK_RES_CapVsAllocByOBS

Schedule Start

Start Date:

Immediately

On Specific Date:

Time Zone:

America/Los_Angeles - Pacific Standard Time

Recurrence:

Recurrence Type:

Calendar

Months:

Every Month

Selected Months:

Jan

Days:

Every Day

Selected Days:

Sun

Dates in Month:

Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

Times:

Hours (required):

0

Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17

Minutes (required):

0

Enter 0, 15, 30, 45 to run every 1/4 hour

Schedule End

End Date:

26

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caWorld'14

Jaspersoft Reports – Output Options

LibraryViewCreate

New Schedule

ScheduleParametersOutput OptionsNotifications

Schedule For: /ca_ppm/reports/resource_management/CSK_RES_CapVsAllocByOBS

Output File Options

File name (required):
CSK_RES_CapVsAllocByOBS

Description:

Time Zone:
America/Los_Angeles - Pacific Standard Time

Output Locale:
pt_BR - Portuguese

Formats:

☐ CSV

☒ HTML

☐ RTF

☐ DOCX

☐ ODS

☐ XLSX

☐ Excel

☐ ODT

☐ XLSX (Paginated)

☐ Excel (Paginated)

☒ PDF

☒ PPTX

File Handling:

☒ Overwrite Files

☐ Sequential File Names by Timestamp

Timestamp Pattern:
yyyyMMddHHmm

Output Destination

☒ Output To Repository
/ca_ppm/reports/resource_management
Browse

☐ Output To Host File System

☐ Output To FTP Server

Server Address

Directory

Username

Password

Test Connection

☐ Enable FTPS

Port
21

Jaspersoft Reports – Notifications

[Library](#) [View](#) [Create](#)

New Schedule

[Schedule](#) [Parameters](#) [Output Options](#) [Notifications](#)

Schedule For: /ca_ppm/reports/resource_management/CSK_RES_CapVsAllocByOBS

Email Notification

Send report when scheduler runs

To:
paulMartin@mailserver.com, edCarmen@mailserver.com
Use commas to separate addresses

CC:

BCC:

Subject:
Capacity vs. Allocation by OBS

Message:
Attached is the latest version of the report for your review.

☐ Include reports as repository links in email body

☒ Include report files as attachments

☐ Include report files as ZIP attachment

☒ Include HTML report in email body

☒ Do not send emails for empty reports

Send job status notifications

To:
peterThompson@mailserver.com
Use commas to separate addresses

Subject:
Report Job Status: Capacity vs. Allocation by OBS

☐ Send success notification
Success Message:

☒ Send failure notification
Failure Message:
Report schedule failed.

☒ Include report job information

☒ Include stack trace



Demo

Thank you!