

CA Project & Portfolio Management Packaged Work Products Catalog

Overview

The packaged work products (PWP) from CA Services extend the functionality of CA Project & Portfolio Management (CA PPM) as a product and can help accelerate the value realization of CA PPM. Developed and supported by the CA Services Solution Center team, these offerings provide benefits such as:

- Pre-configured solutions enable faster realization of business outcome
- Generic framework provides the platform to easily extend the solution to align with customer's own business requirement
- Operational efficiency and user satisfaction increases (eliminating redundant data entry and collating data across systems for reporting purposes)
- Being built with best practice adoption helps achieve optimal quality and performance
- Insight into product adoption, usage and data quality helps PMO and administrators to take proactive steps to improve data quality and adoption

Packaged work products from CA Technologies include software code and documentation. These pre-built components can be deployed and adopted quickly with little or no disruption to your IT operations and staff. CA Services can also provide tailored PWPs to meet specific customer requirements.

A list of PWPs and short descriptions are included below, although this list will continue to evolve over time.

Note that PWPs are only available for versions of CA PPM still supported by CA and there may be a delay in the availability of the PWP after a new software release.

CA PPM Integrations (Inbound)

Name	Description
Resource Adapter for CA PPM	Automates user provisioning and maintenance of resource capacity in CA PPM. The automated bulk upload of user and resource data from an HR system such as Active Directory, SAP, PeopleSoft or WorkDay helps keep resource data in CA PPM in sync with the HR system. Additionally, for CA PPM SaaS customers behind SaaS portal/SSO enabled, it automatically creates/updates users in the SaaS portal eliminating the need to maintain the portal users manually.
Financial Transactions Adapter for CA PPM	Helps with importing labor and non-labor actual costs from an organization's designated financial source of truth into CA PPM. The automated upload of actual costs to specific investments in CA PPM facilitates a comprehensive view of project financial data and helps establish a true comparison of planned and actual costs.

Name	Description
Timesheet Adapter for CA PPM	Imports resource time entries into CA PPM from external systems such as service management applications, including Remedy, ServiceNow or purpose-built timekeeping solutions. It removes the need for timesheet users to duplicate time entry in multiple systems and reporting based on timesheets possible within CA PPM.
OBS Adapter for CA PPM	Helps with importing non-financial OBS from ERP systems (such as SAP, WorkDay or PeopleSoft) into CA PPM and keeping the OBS updated in CA PPM.
Department Adapter for CA PPM	Helps with importing financial department structures from ERP systems (such as SAP, WorkDay or PeopleSoft) into CA PPM, and with keeping the list of departments updated in CA PPM.
Project Adapter for CA PPM	Helps with importing projects from ERP systems into CA PPM and with keeping the list of projects updated in CA PPM. It automatically creates new projects and updates existing projects with changes.
Project Team Adapter for CA PPM	Helps automate the process of loading resource allocations across projects into CA PPM. It can be extended to load allocation detail at a monthly allocation level. It eliminates the need for resource managers or project managers to perform duplicate manual data entry to maintain allocations in CA PPM.
Project Task Adapter for CA PPM	Helps automate the process of loading Project WBS into CA PPM. It helps keep the project tasks synchronized with the system of record, and eliminates the duplicate data entry by the project manager to maintain this in CA PPM.
Rate Matrix Adapter for CA PPM	Helps automate bulk load or update of Rate Matrix data in CA PPM. In many organizations, resource rates are determined by multiple factors and can change relatively frequently. The automated bulk upload of Rate Matrix data ensures that investment cost calculations consider the most recent rates mandated by finance.
Application Adapter for CA PPM	Helps with importing lists of applications from standard CMDB systems into CA PPM and with keeping them updated in CA PPM. Creating an inventory of applications in CA PPM helps your organization get a basic understanding of supporting technology, maintenance costs and risks and is the first step toward application portfolio management.
Custom Object Adapter for CA PPM	Custom objects help extend CA PPM functionalities to support a variety of needs such as forms on a project, source list for lookups and more. Custom objects are often critical to a CA PPM deployment, and the custom object instances must be in sync with a source system. The Custom Object Adapter for CA PPM helps with importing/updating such custom object instances from external systems of record.
Risk Adapter for CA PPM	Helps automate the process of bulk load of risks into CA PPM projects. This helps project managers to see the true health of the project by providing a holistic view of all the risks associated to a project in CA PPM, and to manage/track them to closure.
Issues Adapter for CA PPM	Helps automate the process of bulk load of issues into CA PPM projects. This helps project managers to get a holistic view of all the issues associated to a project in CA PPM and to manage/track them to closure.
Cost Plan Adapter for CA PPM	Helps automate bulk load of forecasted costs data from external financial system of record into CA PPM. It helps project managers to get the true and holistic view of forecasts on their investments directly in CA PPM.
Incident Adapter for CA PPM	Used to automate the process of loading Incidents into CA PPM from external systems like ServiceNow and Remedy. This helps the incidents be available in CA PPM for tracking time and helps the application owners understand the total cost of ownership.

CA PPM Integrations (Outbound)

Name	Description
Data Extraction for CA PPM	Supports a variety of data extract needs, such as outbound integrations where CA PPM data is sent to an external system or extracted for further analysis. The data extraction activity can be scheduled via CA PPM's native job scheduler or run ad-hoc as a CA PPM job. Data extraction supports export of data in the most common industry file formats, including delimited flat files (.csv), .xml and Microsoft® Excel® files (.xlsx). The exported data file is placed on a shared drive, SFTP accessible to CA PPM, so that the external system can pick up the extract and import/process the same.

CA PPM Integration With Agile Tools

Name	Description
Jira Agile Integration for CA PPM	The Jira - CA PPM bi-directional integration synchronizes Epics, User Stories, Tasks, Bugs, etc. from Jira into CA PPM Projects and WBS. The integration can be tailored to allow all or only a subset of data elements to be created and/or updated from CA PPM to Jira.

CA PPM Integration With Service Management Tools

Name	Description
ServiceNow Incident Integration for CA PPM	Enables unidirectional import of IT service incidents data from the customer's ServiceNow instance to CA PPM. This packaged work product is delivered through use of Web services to provide near real-time extraction of IT incidents from ServiceNow and map them into incidents in CA PPM. Optionally, the PWP also imports the time recorded in ServiceNow against incidents and imports them into CA PPM timesheets against those incidents, thus eliminating the need for the users to do dual time entries.
ServiceNow Work Request Integration for CA PPM	Enables unidirectional import of IT service management work requests data from the customer's ServiceNow instance to CA PPM. This packaged work product is delivered through use of Web services to provide near real-time extraction of IT work requests from ServiceNow and map them into projects in CA PPM.

CA PPM Integration With Microsoft SharePoint®

Name	Description
ecBoss SharePoint Integration for CA PPM	<p>Provides a SharePoint integration solution for CA PPM that provides enterprise-wide visibility of your systems data. Executives, managers and employees will get access to the tools and data they need, when they need it, without the red tape.</p> <p>Your organization will be able to attain, update/edit and visualize systems and project data seamlessly, with the ability to create/deliver real-time reports without delay. ecBoss also unlocks SharePoint's popular document and collaboration features for the entire enterprise, which drives adoption and allows for increased effectiveness with document approvals, document management, workflows and team collaboration.</p>

CA PPM Data Migration/Data Load

Name	Description
Data Migration for CA PPM	<p>Allows administrators to import project and portfolio data from external sources into CA PPM. This Java®-based utility includes pre-defined rules, which validate records prior to import. With no special programming, users can define source and destination field mappings, which are saved in CA PPM as configurations that can be modified and re-used for additional import jobs. The utility also includes backup and restore facilities to help administrators manage configuration. Data Migration for CA PPM supports importing data stored in flat files (.csv, .txt) or Microsoft Excel files (.xlsx, .xlsxm).</p>
CA PPM Microsoft Excel Interface for Resource	<p>Enables CA PPM administrators, resource managers and/or users with similar roles to bulk create new resources or update resource attributes of existing resources in CA PPM directly from an Excel spreadsheet. It provides resource managers an easier and convenient way to maintain their resource data—such as the resource's basic data, personal info, management info and financial info—in CA PPM.</p>
CA PPM Microsoft Excel Interface for Transaction	<p>Enables the CA PPM administrators, project managers and/or users with similar roles to bulk load the financial actuals and costs against one or more investments directly from Excel. This component will augment transaction creation in CA PPM by offering functionality to bulk load transactions when users do not want to create them one transaction at a time from UI.</p>

CA PPM Data Quality and Governance

Name	Description
Data Integrity for CA PPM	<p>Helps CA PPM administrators identify and correct non-compliant business data that violate defined criteria. The criteria for data integrity are defined within 70+ preconfigured business rules that can be modified, activated or deactivated to meet requirements. New business rules can be created easily through the solution if the preconfigured rules do not meet the required data quality checks. When violations to business rules occur, the offending data is displayed in portlets, where users and administrators can address issues.</p> <p>Additionally, the PWP takes a monthly snapshot of the data quality executing the active business rules and provides trend analysis and details over a six-month period. This helps the PMO team understand the most non-compliant rules and the responsible parties and helps them take proactive measures to address issues.</p>
Real-Time Timesheet Validation for CA PPM	<p>Extends the CA PPM timesheet capability by providing real-time validation with on-screen error messages. It significantly improves accuracy of time entry in CA PPM by reducing the opportunity of human errors. The Timesheet Validation for CA PPM is CA SaaS-compliant and leverages the timesheet hook and a business rules container to deliver the capability.</p>
Advanced Resource Planning	<p>Simplifies resource management in CA PPM. Due to its intuitive and easy-to-use interface, this add-on significantly accelerates the existing work processes. Users are always alerted to current resource utilization, which helps facilitate easy management of resources across all projects and processes. This benefits both project managers and resource managers alike by providing a comprehensive view of their respective portfolio resource situation.</p>

For more information, please visit ca.com



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