

Spain & Portugal

CA Clarity User Group Meeting

- CA Technologies

Wednesday, June 17, 2015

Agenda

1

JASPERSOFT REPORTING & CA PPM DATA WAREHOUSE

2

CA PPM ENABLES SAFe

3

RALLY. ACQUISITION AGREEMENT

Jaspersoft Reporting & CA PPM Data Warehouse

What to Expect When You're Expecting ... 14.2 (Reporting)



CA PPM – Jaspersoft Overview

Lightweight, easy to use, drag-and-drop, self-service ad hoc reporting capability

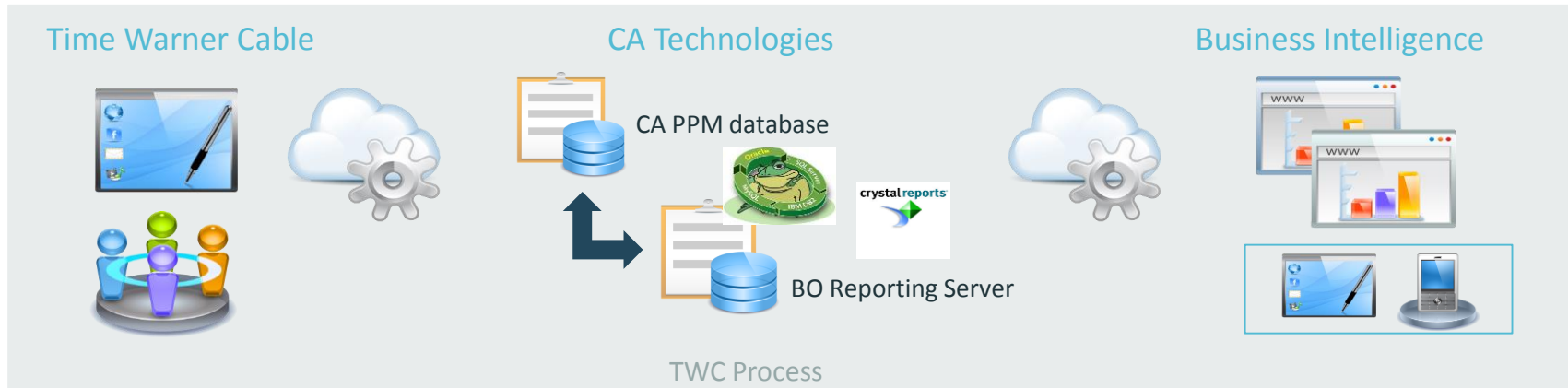
- Jaspersoft provides a simple and powerful experience.
 - **Integrated:** Access ad hoc reporting from within CA PPM. Custom attributes and objects available for reporting.
 - **Self-service:** No separate log ins, no steep learning curves. Users get the information they need, export it, email it, and consume it as they want
 - **Powerful:** Jaspersoft is a reporting toolset used to develop sophisticated reports similar to Crystal Reports in BO.

- **Note – You can stay on Business Objects for a limited time. Refer to the Jaspersoft FAQ on the CA Support Site for more details.

CA PPM – Jaspersoft - Overview (cont'd)

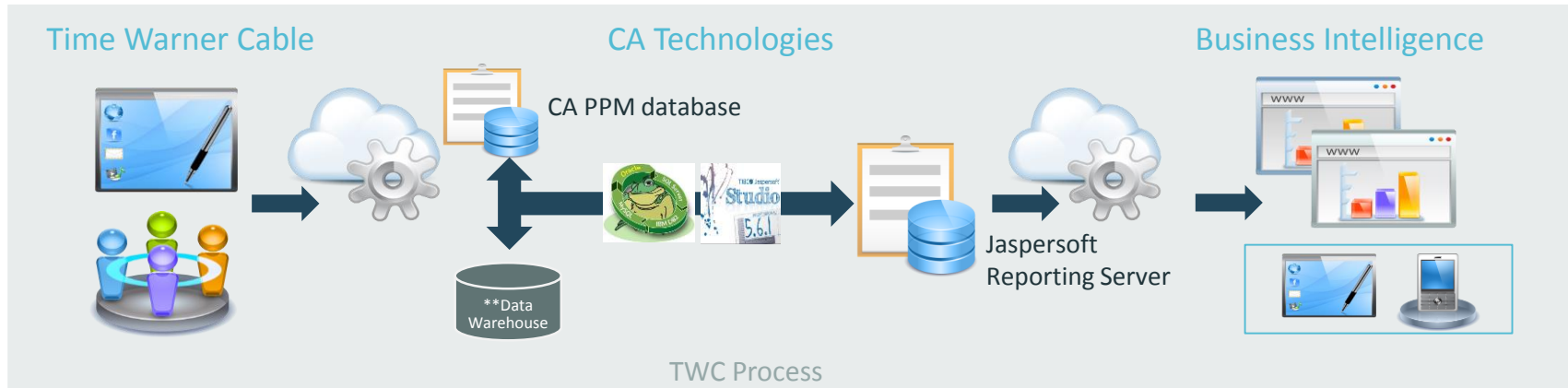
- Jaspersoft and the Data Warehouse: Why a Data Warehouse?
 - **Easy access:** The data warehouse simplifies the data model and makes end user ad hoc reporting simple and powerful. This reduces the demand for custom report development and delivers powerful information to your users – when they need it.
 - **More performant:** The data warehouse schema resides on another database server taking the stress off the transactional CA PPM database.
 - **Any reporting solution:** You can access the information in the data warehouse from any reporting solution. We deliver it – you consume it as you see fit.

Reporting Architecture – “As Is” on 13.2



- End Users input data into CA PPM (Ideas, Status Reports, Project Schedules, Risks, Issues, etc.).
- CA PPM team writes a 'Read Only' SQL query against the production CA PPM Database using TOAD.
- Once the query returns the correct result set, we embed the query into the Crystal Report.
- Next we complete the report design in Crystal Reports and publish it to the BO Report Server.
- Finally we create the report link in the CA PPM Report Library and map it to the corresponding report on the BO Report Server.

Reporting Architecture – “To Be” on 14.2



- End Users input data into CA PPM (Ideas, Status Reports, Project Schedules, Risks, Issues, etc.).
- CA PPM team writes a 'Read Only' SQL query against the CA PPM Database/Data Warehouse.
- Once the query returns the correct result set, we embed the query into the Jaspersoft Report.
- Next we complete the report design in Jaspersoft and publish it to the Jaspersoft Report Server.

**Note – you will need to run the “Load the Data Warehouse job(s)” if you are writing your query against the Data Warehouse.

CA PPM Jaspersoft - Overview

Jaspersoft Studio Reports



Ad Hoc Reports



Ad Hoc View

Ad Hoc Reports



Ad Hoc View

Ad Hoc View

Domain

Domain

Data
Warehouse

CA PPM
Database

Data Warehouse Setup

The screenshot shows the 'Object: Strategic Objective - Properties' form in the Clarity PPM application. The form is divided into several sections. The top section contains 'Object Name' (Strategic Objective), 'Object ID' (strategic_objective), and 'Content Source' (Customer). Below this is a 'Description' field. The next section is 'Master or Subobject', with 'Master' selected. This is followed by a 'Partition Model' field and a 'Subobject' radio button. The 'Master Object' field is also present. At the bottom, there are several checkboxes: 'Event Enabled', 'Include in the Data Warehouse' (checked), 'Copy Enabled', 'Export Enabled', and 'View All Enabled'. A legend at the bottom left indicates that a red square icon means 'Required' and a green square icon means 'Enter Once'. The form has 'Save', 'Save And Return', and 'Return' buttons at the bottom.

- Customer-specific objects can be included in the data warehouse via Studio. Simply check the box for 'Include in the Data Warehouse.'
- The attributes of the object also need to be selected manually for inclusion into the data warehouse.

- Customer Specific Objects

The “End User Experience”

Clarity PPM

Home Administration Favorites

Clarity Advanced Reporting

Library View Manage Create

Options

Project OBS Unit

Project Manager

Project

* Project Status

Submitted for Approval

Unapproved

Approved

Work Status

* Amount Type

* Risk, Issue, and Change Request Priority

Low

Medium

High

* Risk, Issue, and Change Request Status

Open

Work in Progress

Resolved

Include Inactive Projects?

Include Inactive Resources?

Apply Reset Save

Project Status Detail

Data refreshed Oct 27, 2014 at 11:06:37 AM

Page 7 of 89

100%

search report

Back

Project Status Detail: Change Mgt for Internal Portal

Project ID	PR1024	Status Report Date	12/18/2014	Stage	Initiation	Status Report Indicators
Project Manager	McCarthy, John	Previous Report Date	12/11/2014	Finish Date	3/21/2015	Overall
Project Type	Application Change	Status	Unapproved	Baseline Finish Date	3/21/2015	Schedule
Goal	Maintain the Business	Progress	Not Started	Days Late	0	Scope
						Cost and Effort
					(Hours)	
Status Report Update				Baseline	1,600.00	Project Indicators
Thanks to the executive team intervening we finally have a scope of what needs to be updated and how to proceed.				Actuals	0.00	Schedule to Baseline
				ETC	1,600.00	Alignment
				EAC	1,600.00	Risk
				Projected Effort Variance	0.00	Issue
				Projected Effort Variance %		Change
Project Objective						
Requests for Change from Service Desk for enhancements/support issues concerning the Corporate Internal Portal						

Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Architect	Architect	12/4/2014	12/11/2014	3/21/2015	1/5/2015	Soft	New	160.00	0.00	160.00
Business Analyst	Business Analyst	12/4/2014	12/11/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Developer	Developer	12/4/2014	1/1/2015	3/21/2015	2/24/2015	Soft	New	328.00	0.00	320.00
Network Engineer	Network Engineer	12/4/2014	12/25/2014	3/21/2015	2/28/2015	Soft	New	216.00	0.00	240.00
Project Manager	Project Manager	12/4/2014	12/4/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Storage Architect	Storage Architect	12/4/2014	12/25/2014	3/21/2015	1/19/2015	Soft	New	160.00	0.00	160.00
Test Engineer	Test Engineer	12/4/2014	2/6/2015	3/21/2015	2/28/2015	Soft	New	136.00	0.00	160.00

Key Milestones						
Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule

The “End User Experience” – Power Point

Project Status Detail: Change Mgt for Internal Portal

Project ID	PR1024	Status Report Date	12/18/2014	Stage	Initiation	Status Report Indicators				
Project Manager	McCarthy, John	Previous Report Date	12/11/2014	Finish Date	3/21/2015	Overall				
Project Type	Application Change	Status	Unapproved	Baseline Finish Date	3/21/2015	Schedule				
Goal	Maintain the Business	Progress	Not Started	Days Late	0	Scope				
Status Report Update					(Hours)	Cost and Effort				
Thanks to the executive team intervening we finally have a scope of what needs to be updated and how to proceed.					Baseline	1,600.00	Project Indicators			
					Actuals	0.00	Schedule to Baseline			
					ETC	1,600.00	Alignment			
					EAC	1,600.00	Risk			
					Projected Effort Variance	0.00	Issue			
					Projected Effort Variance %		Change			
Project Objective										
Requests for Change from Service Desk for enhancements/support issues concerning the Corporate Internal Portal.										

Project Team										
Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Architect	Architect	12/4/2014	12/11/2014	3/21/2015	1/5/2015	Soft	New	160.00	0.00	160.00
Business Analyst	Business Analyst	12/4/2014	12/11/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Developer	Developer	12/4/2014	1/1/2015	3/21/2015	2/24/2015	Soft	New	328.00	0.00	320.00
Network Engineer	Network Engineer	12/4/2014	12/25/2014	3/21/2015	2/28/2015	Soft	New	216.00	0.00	240.00
Project Manager	Project Manager	12/4/2014	12/4/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Storage Architect	Storage Architect	12/4/2014	12/25/2014	3/21/2015	1/19/2015	Soft	New	160.00	0.00	160.00
Test Engineer	Test Engineer	12/4/2014	2/6/2015	3/21/2015	2/28/2015	Soft	New	136.00	0.00	160.00

Key Milestones										
Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule				

The “End User Experience” – iPad Screenshot ...

The screenshot displays the Clarity PPM iPad interface. At the top, the Clarity PPM logo is on the left, and the user 'Niku Administrator' with links for 'Logout', 'Help', and 'About' is on the right. Below this is a navigation bar with 'Home', 'Administration', and 'Favorites' tabs. The main header reads 'Clarity Advanced Reporting'. A sub-header bar contains 'Library', 'View', and 'Create' options. The main content area is titled 'Project Status Detail' with a timestamp 'Data refreshed Oct 27, 2014 at 6:23:49 PM'. Below this is a control bar with page navigation (Page 1 of 48), zoom (80%), a search report field, and various action icons. The central part of the screen is divided into several sections: 'Project Status Detail: Change Mgt for Online Order Entry' (a title bar), a table of project metadata, a 'Status Report Update' text box, a table of project metrics, 'Status Report Indicators' with green diamond icons, 'Project Indicators' with yellow diamond icons, and a 'Project Objective' text box. At the bottom, a 'Project Team' table lists team members and their roles.

Project Status Detail: Change Mgt for Online Order Entry

Project ID	PR1026	Status Report Date	10/14/2014	Stage	Building	Status Report Indicators	
Project Manager	McCarthy, John	Previous Report Date	10/7/2014	Finish Date	10/22/2014	Overall	◆
Project Type	Application Change	Status	Approved	Baseline Finish Date	10/22/2014	Schedule	◆
Goal	Maintain the Business	Progress	Started	Days Late	2	Scope	◆
Status Report Update				(Hours)		Cost and Effort	◆
Technical aspects of the project are progressing well; we are having some issues with the "people" side of the changes. The employees are reluctant to adapt to the new system.				Baseline	56.00	Project Indicators	
				Actuals	0.00	Schedule to Baseline	◆
				ETC	56.00	Alignment	◆
				EAC	56.00	Risk	◆
				Projected Effort Variance	0.00	Issue	◆
				Projected Effort Variance %	◆	Change	◆
Project Objective				Change Management RFCs for the Online Order Entry Application. RFC's are fed from Service Desk as part of the ITIL based change mgt process.			

Project Team										
Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Patel, Sanjay	Developer	10/4/2014	10/4/2014	10/22/2014	10/22/2014	Soft	New	76.00	0.00	56.00

The “End User Experience” – Scheduling

The screenshot shows the 'Clarity Advanced Reporting' application window. The top navigation bar includes 'Home', 'Administration', and 'Favorites'. Below this is a sub-header 'Clarity Advanced Reporting' with a search bar and tabs for 'Library', 'View', 'Manage', and 'Create'. The main content area is titled 'New Schedule' and contains several tabs: 'Schedule', 'Parameters', 'Output Options', and 'Notifications'. The 'Schedule' tab is active, showing a form for scheduling a report. The form includes fields for 'Schedule For' (set to '/ca_pgm/reports/project_management/CSK_PRI_ProjectStatusDetail'), 'Schedule Start' (with options for 'Immediately' or 'On Specific Date' set to '2014-10-27 00:00'), 'Time Zone' (set to 'America/New_York - Eastern Standard Time'), 'Recurrence Type' (set to 'Calendar'), 'Months' (set to 'Every Month'), 'Days' (set to 'Every Day'), 'Times' (set to '0' hours), 'Minutes' (set to '0'), 'Schedule End' (with an 'End Date' field), and 'Holidays' (set to 'None'). At the bottom of the form are 'Save' and 'Cancel' buttons.

Clarity Advanced Reporting

Library View Manage Create

New Schedule

Schedule Parameters Output Options Notifications

Schedule For: /ca_pgm/reports/project_management/CSK_PRI_ProjectStatusDetail

Schedule Start

Start Date:

☐ Immediately

☒ On Specific Date: 2014-10-27 00:00

Time Zone: America/New_York - Eastern Standard Time

Recurrences:

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:

Holidays

Calendar of dates to exclude: None

Save Cancel

The “End User Experience” – Output Options

Clarity Advanced Reporting

Library View Manage Create

New Schedule

Schedule For: /ca_ppm/reports/project_management/CSK_PRJ_ProjectStatusDetail

Output File Options

File name (required):
CSK_PRJ_ProjectStatusDetail

Description:

Time Zone:
America/New_York - Eastern Standard Time

Output Locale:
(Default)

Formats:

☐ CSV

☐ DOCX

☐ Excel

☐ Excel (Paginated)

☒ HTML

☐ ODS

☐ ODT

☒ PDF

☐ RTF

☐ XLSX

☐ XLSX (Paginated)

☒ PPTX

File Handling:

☒ Overwrite Files

☐ Sequential File Names by Timestamp

Timestamp Pattern:
yyyyMMddHHmm

Output Destination

☒ Output To Repository
/ca_ppm/reports/project_management
Browse

☐ Output To Host File System

☐ Output To FTP Server
Server Address
Directory
Username
Password
Test Connection

☐ Enable FTPS
Port
21

The “End User Experience” – Notifications

Clarity Advanced Reporting

Library View Manage Create

New Schedule

Schedule Parameters Output Options Notifications

Schedule For: /ca_ppm/reports/project_management/CSK_PRI_ProjectStatusDetail

Email Notification

Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:

☒ 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:

Use commas to separate addresses

Subject:

☐ Send success notification

Success Message:

☐ Send failure notification

Failure Message:

☐ Include report job information

☐ Include stack trace

Security Rights – Advanced Reporting

The screenshot shows the 'Clarity PPM' interface. The top navigation bar includes 'Home', 'Administration', and 'Favorites'. Below this, a sub-navigation bar shows 'Properties', 'OBS and Partitions', 'Groups', 'Resource's Access Rights' (selected), and 'Access to this Resource'. The main heading is 'Resource: Niku Administrator - Global Access Rights'. Below the heading, it states 'Below are this resource's global rights.' There are two input fields: 'Access Right' with the value 'Advanced*' and 'Description' which is empty. Below these is a 'Granted Through' dropdown menu set to 'All'. At the bottom of this section are three buttons: 'Filter', 'Show All', and 'Clear'. A table follows with three columns: 'Access Right', 'Description', and 'Granted Through'. The table lists seven access rights for 'Advanced Reporting', each with a checkbox, a description of permissions, and the assigned resource.


<input type="checkbox"/>	Access Right▲	Description	Granted Through
<input type="checkbox"/>	Advanced Reporting - Ad Hoc Create	Allows resource to navigate to the Advanced Reporting page and create Ad Hoc Views. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_ADHOC_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Administer	Allows resource to navigate to the Advanced Reporting page and administer Advanced Reporting. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_ADMINISTRATOR.	Resource
<input type="checkbox"/>	Advanced Reporting - Dashboard Create	Allows resource to navigate to the Advanced Reporting page and create Dashboards. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_DASHBOARD_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Data Source Create	Allows resource to navigate to the Advanced Reporting page and create Data Sources. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_DATASOURCE_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Domain Create	Allows resource to navigate to the Advanced Reporting page and create Domains. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_DOMAIN_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Navigate	Allows resource to navigate to the Advanced Reporting page. Resource is assigned Jaspersoft role as ROLE_USER.	Resource
<input type="checkbox"/>	Advanced Reporting - Report Create	Allows resource to navigate to the Advanced Reporting page and create Reports. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_REPORT_DESIGNER.	Resource

Navigation and Repository - Overview

EASY TO USE NAVIGATION TILES WITHIN CA PPM

- Navigation
 - Access via the Advanced Reporting menu option in CA PPM
 - Tiles to create and view items display based on access rights
 - Open recently viewed items or quickly search for ad hoc views and reports
- Repository
 - Easy to use with an Outlook-like folder structure
 - CA PPM folder should not be overwritten – make a copy for editing

Navigation and Repository

 **Clarity PPM**

Paul Martin [Logout](#) | [Learn](#) | [Help](#) | [About](#)

Home Favorites


Clarity Advanced Reporting

Library View Create

Home

Recently Viewed Items


Project Storyboard	Report
Financial Forecast Review by Investment	Report
Time Compliance	Report
Project Status Detail	Report
KPIs by Project Type	Report
Project Portfolio Summary	Report
Resource Forecasted Utilization	Report
Capacity vs. Allocation by OBS	Report



Ad Hoc Views

Visualize your data for analysis and report creation. [View tutorial](#)


CreateView list



Reports

Create and format interactive reports from existing Ad Hoc views. [View tutorial](#)

CreateView list




Dashboards

Combine related reports into custom dashboard layouts. [View tutorial](#)

Create

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Jaspersoft Ad Hoc Views - Overview

CREATE QUICK, SOPHISTICATED VIEWS INTO YOUR DATA

- What is the Ad-Hoc Viewer?
 - An interactive web-based designer for creating and editing views to explore and analyze data and/or for reporting
 - Answers the requirement: “Show me the data”
- New Capabilities
 - One view of the data - the ad hoc viewer is embedded into CA PPM
 - Reuse and share the views by saving to the repository
 - Better performance – the views run against the Data Warehouse

Demonstration of Jaspersoft Ad Hoc Report - Table

The screenshot displays the Jaspersoft Ad Hoc Report interface. The top navigation bar includes 'Library', 'View', 'Manage', and 'Create'. The main area is titled 'Domain: Investment Mana...'. On the left, the 'Fields' pane lists various fields under 'Investments' and 'Measures'. The 'Columns' section shows 'Project Name', 'Start Date', 'Finish Date', and 'Total Allocated Hours'. The 'Groups' section shows 'Investment Manager'. The table is titled 'Project Allocations by Manager' and is filtered by 'Investment Manager'. The table data is as follows:

	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

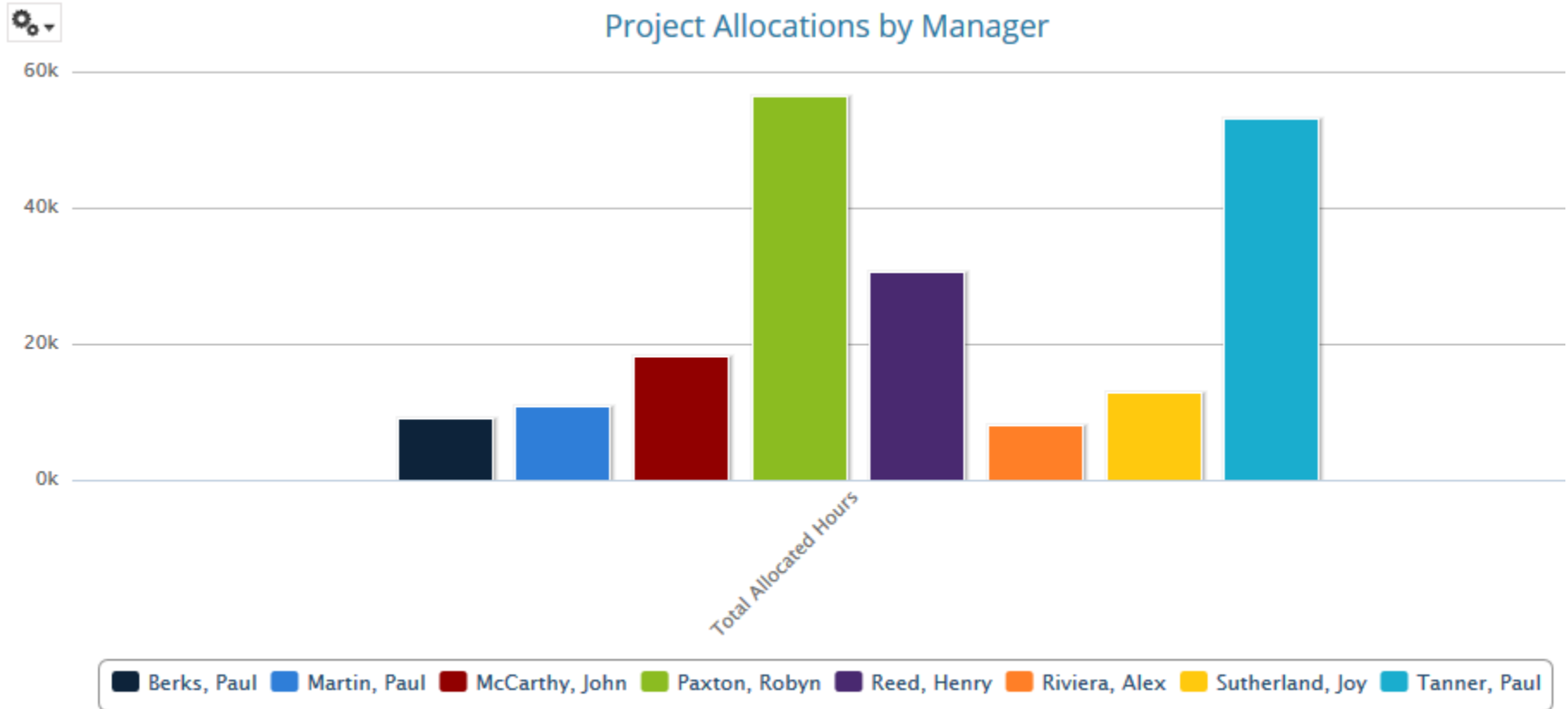
The right side of the interface shows the 'Filters' pane with 'A.Investment Type equals' and 'B.Investment Mana... is one of'. The 'Custom Filter Expression' section is at the bottom right.

Demonstration of 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

Create a Jaspersoft Ad Hoc View - Chart

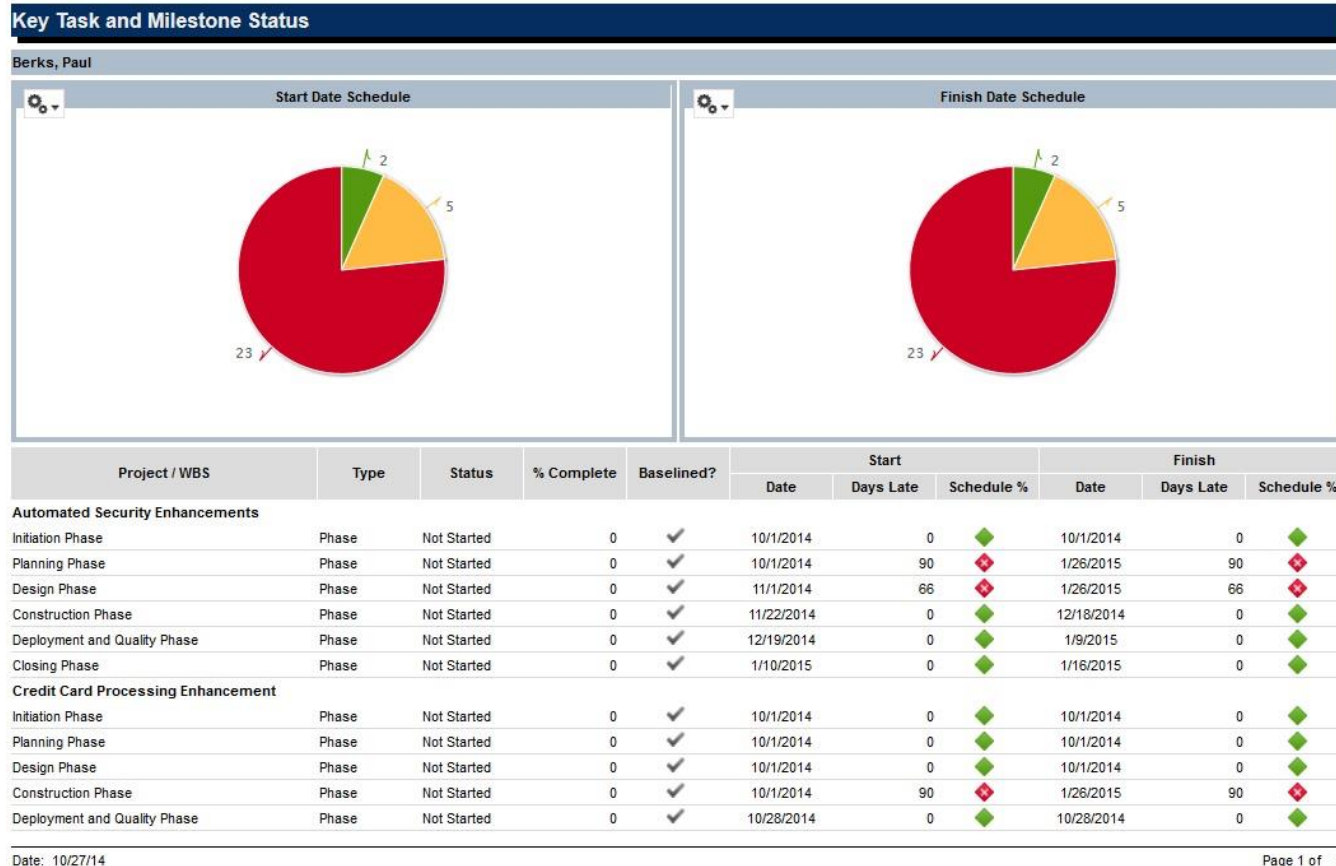


Jaspersoft Studio Reports - Overview

INTERACTIVE – EMAIL AND EXPORT REPORTS – SCHEDULE REPORTS – CASCADING FILTERS

- New Capabilities
 - Easy to use, interactive reports that run within CA PPM
 - Filter options and report results in the same window, with support for cascading filters
 - More scheduling options, can email reports, export reports (PowerPoint, PDF, Excel, Word, etc.), and output to server
 - Report and style templates can be created
 - Reports can be developed in CA PPM against either the data warehouse or the transactional database

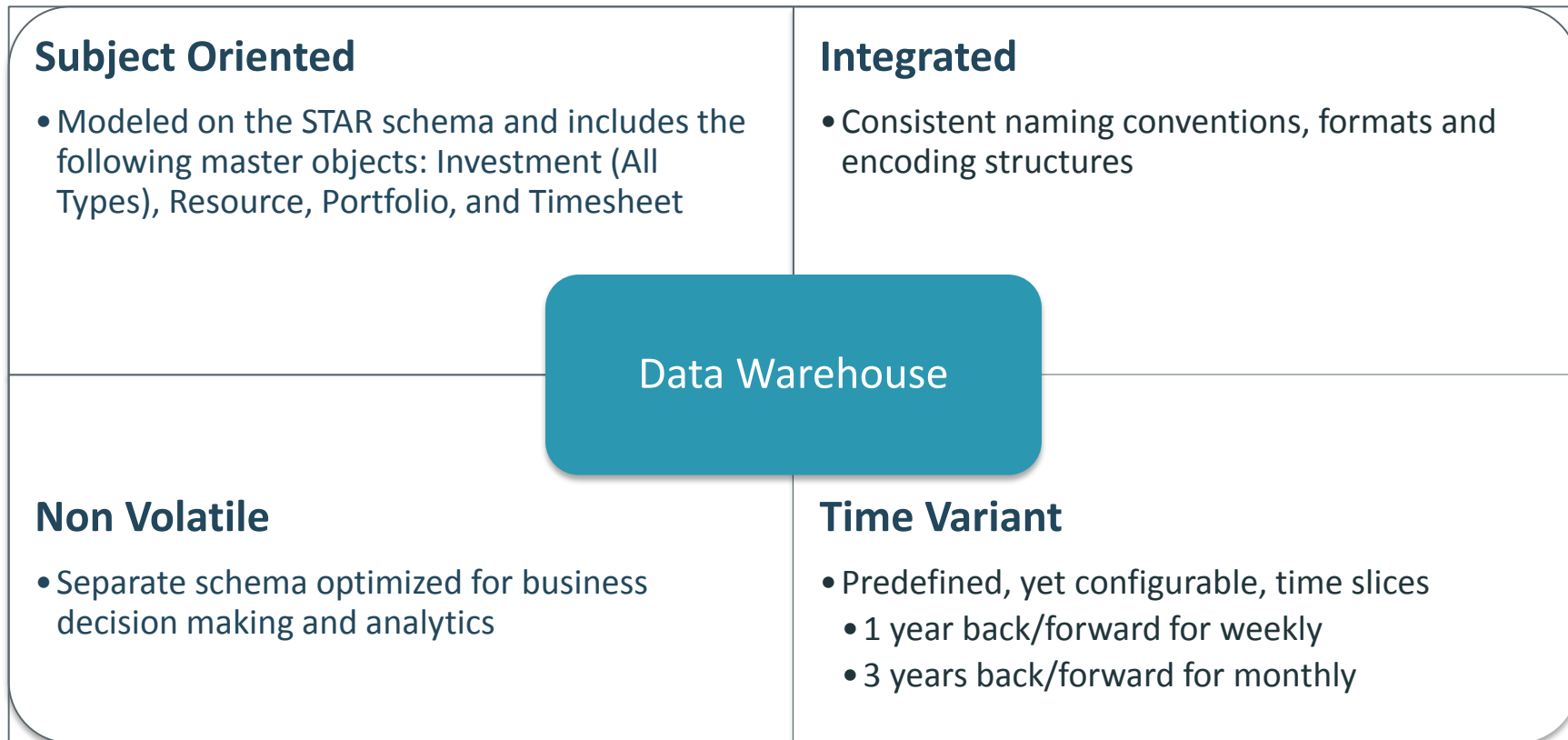
Run a Jaspersoft Studio Report



ca Intellicenter

DEMO

Data Warehouse Overview

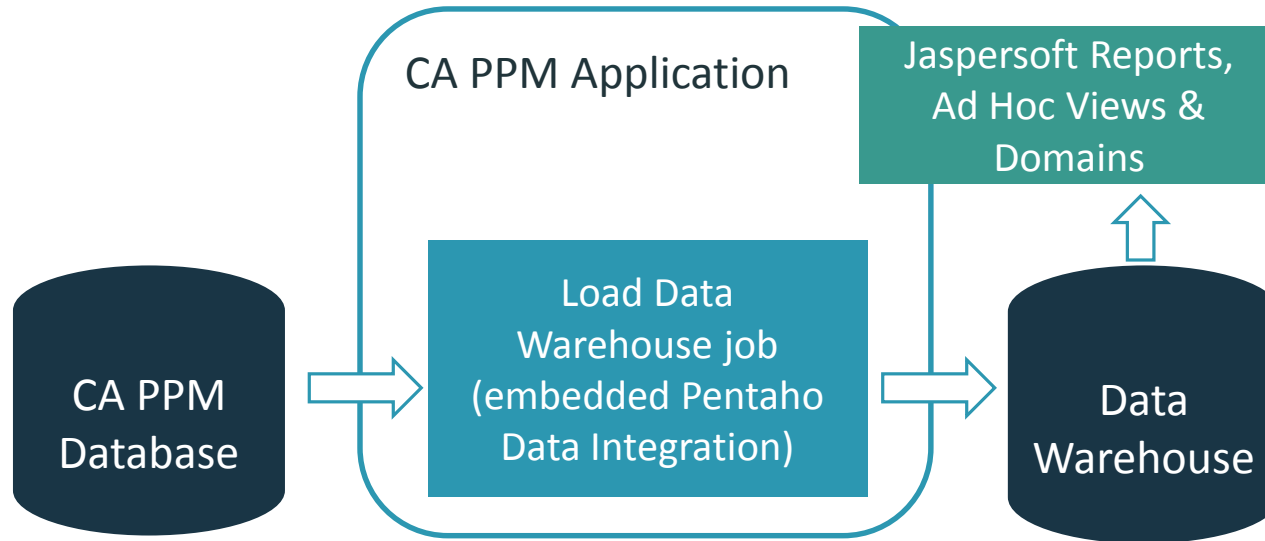


Data Warehouse Overview

Common Terms

- Dimensions are the descriptive fields on an object (Examples: Investment ID, Investment Name, Investment Manager, etc.).
- Facts are the metrics on an object (Examples: Total Cost, Actual Hours, etc.).
- Star Schema is a type of database design. A simple Star would have a fact table with a few direct links to dimension tables.
- A Snowflake is a dimension table that can be indirectly linked to a fact table.

CA PPM Reporting Architecture



- Pentaho Data Integrator is embedded within CA PPM. The data transformation and load runs as a CA PPM job.

- Lightweight, drag and drop business user reporting capability
- Out of the box reports and domains for Investments, Resources, Financials, and Timesheets.
- The Data Warehouse is modeled on a STAR schema, with Dimensions covering the major areas in CA PPM and their associated Facts.

Data Warehouse Overview

Addresses Reporting Challenges

- Reports and portlets run against transactional data
 - The data warehouse schema resides on another database server taking the stress off the transactional CA PPM database.
- Relational database makes queries very complex
 - The data warehouse carries keys and descriptive values in the dimension tables so fewer joins are required. Facts are combined into summary and period tables.
- Finding the data with 1000+ tables
 - With the exception of configuration and meta tables, the data warehouse tables are 'user friendly' to report against.
- Table name inconsistencies
 - Similar tables are grouped together by the table prefix and the names are very descriptive.

Data Warehouse Overview

Addresses Reporting Challenges

- Time slice requests
 - Specific time slice requests are set up to populate the data warehouse. Defaults are set but can be modified.
- Column naming
 - Columns are consistently named across tables.
- Resource ID versus user ID
 - In the CA PPM database, manager points to the user ID and resource points to the resource ID, or code, which makes it inconsistent. In the data warehouse, resource columns (manager_key, resource_key, etc.) are always the resource_key.
- Date/time storage
 - In the CA PPM database, the finish/end dates do not always match those displayed in CA PPM. Database functions in queries must be leveraged to determine the correct date. In the data warehouse, the finish/end dates always match CA PPM.

Loading the Data Warehouse

ETL Jobs

Reports and Jobs

- Load the Data Warehouse Security Privileges
 - Loads the investment / resource security for the system users
 - Separate job - the security job is not incremental, the table gets truncated and rebuilt
- Load the Data Warehouse
 - Loads the complete data warehouse
 - ETL job steps:
 - Runs scripts the data warehouse is dependent upon: calendar population, WBS hierarchy, investment hierarchy
 - Builds the meta data that determines the data warehouse structure
 - Checks/corrects any data warehouse structure changes
 - Loads/updates the lookup tables
 - Loads/updates the dimension tables
 - Loads/updates the fact tables

Data Warehouse Table Prefix Standards

- DWH_CFG - Configuration tables used to supply the data warehouse log and audit information
- DWH_CMN - Common database objects used across most areas
- DWH_CMP - Company database objects
- DWH_FIN - Financial management database objects
- DWH_INV - Investment management database objects
- DWH_LKP - Lookup database objects
- DWH_META - Meta data tables that help determine the data warehouse structure
- DWH_ODF - Custom database objects
- DWH_PFM - Portfolio management database objects
- DWH_RES - Resource management database objects
- DWH_RIM - Risk, issue and change management database objects
- DWH_TME - Time management database objects
- DWH_X - Internal database objects used to help populate the fact tables

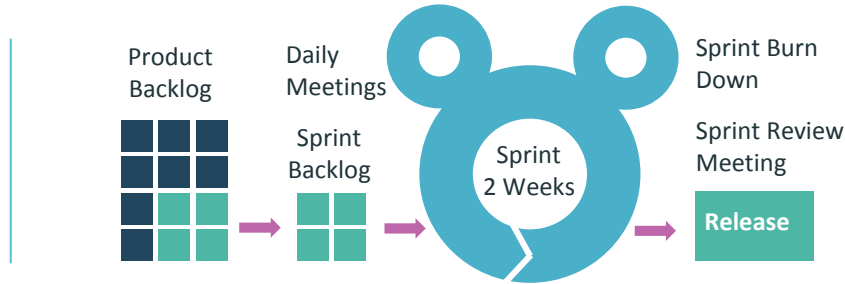
CA PPM Enables SAFe

The biggest challenge for our customers today:

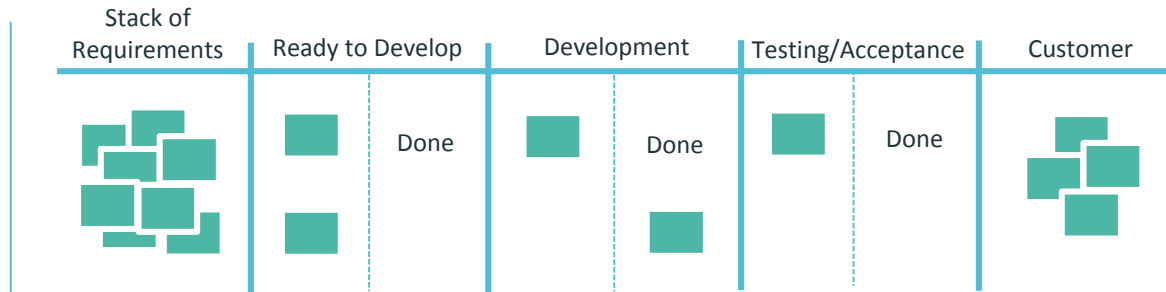


Agile 101: Multiple Approaches/Methodologies

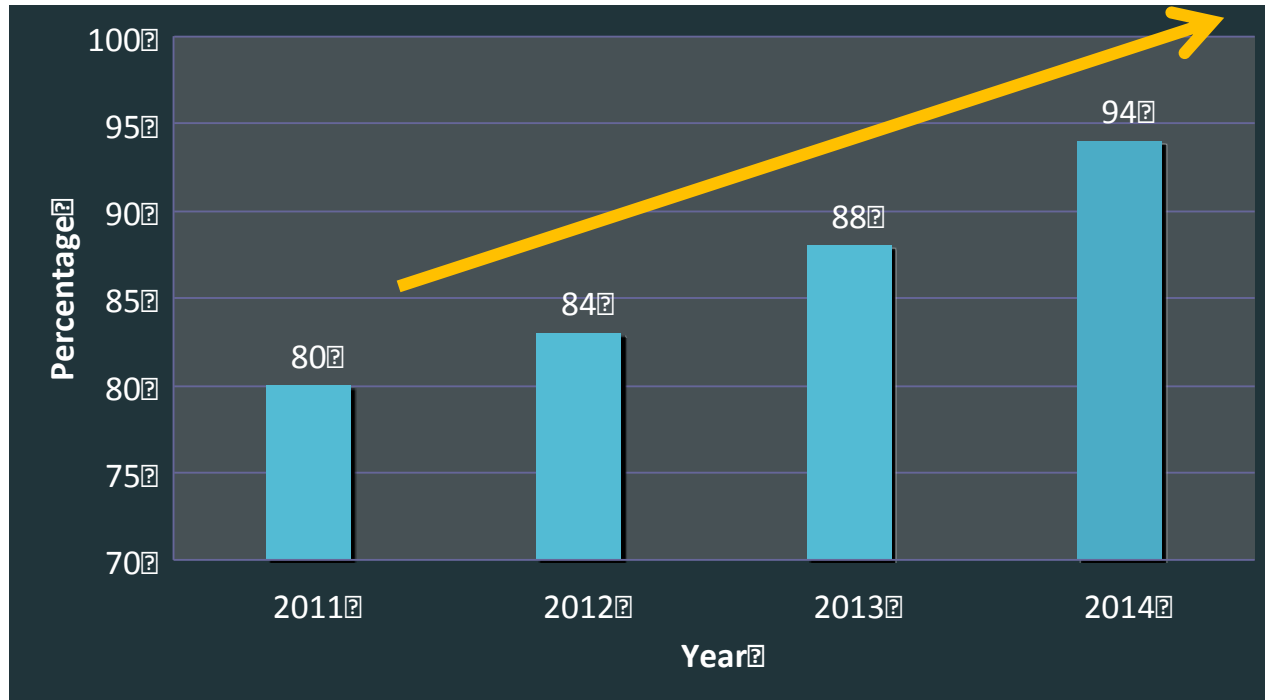
SCRUM



KANBAN



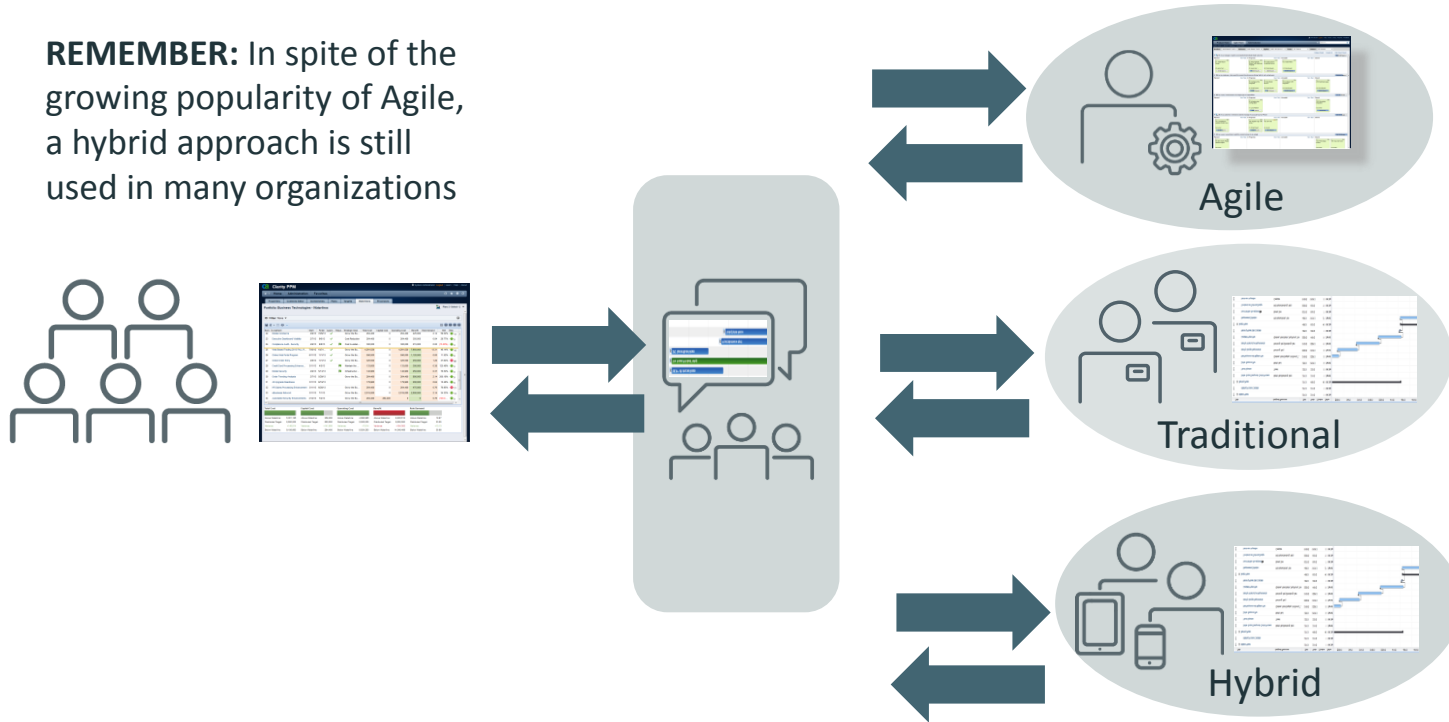
Percentage of Organizations Practicing Agile by Year



From the VersionOne 9th Annual State of Agile™ Survey. www.stateofagile.com. All rights reserved © 2015

Organizations are Heterogeneous

REMEMBER: In spite of the growing popularity of Agile, a hybrid approach is still used in many organizations

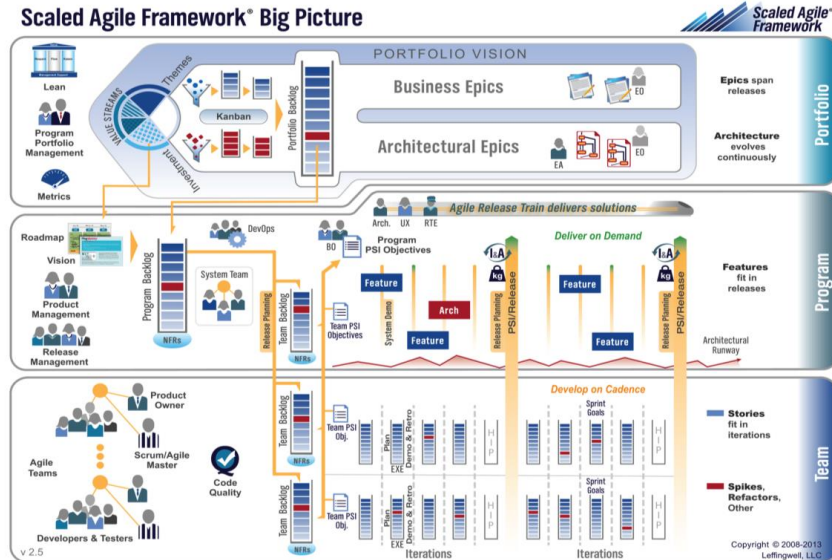


Product Focused Frameworks



The Scaled Agile Framework® (SAFe)

The Scaled Agile Framework is a proven, public-facing framework for applying Lean and Agile practices at enterprise scale



- Synchronize alignment, collaboration and delivery
- Well-defined in books and now on the Web
- Scales successfully to large numbers of practitioners and teams

Core Values:

1. Code Quality
2. Program Execution
3. Alignment
4. Transparency

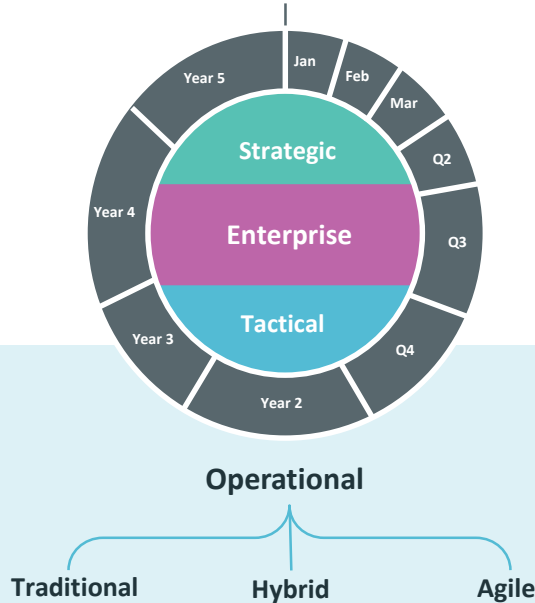
41



CA PPM Enables SAFe

CA PPM – Product-Focused Planning

Top Tier Funding Allocation



“Own the Planning”

- Enhanced product planning
- Determine and optimize what to bring to market
- Resource and financial planning

“Own the Outcomes”

- Enable the business to see when features can be brought to market
- Visibility into overall product health

“Own the Money”

- Financial engine
- Budgeting and True Cost Management
- Project and Program Management and funding

“Capture the Work”

- Integration to traditional tools: MS Project, Open Workbench
- Integration to ALM tools: Rally, V1, JIRA, TFS, RTC

EXISTING CUSTOMERS



Protect the base

- 12,000 users today
- Using V1
- Going to a fully agile model
- Not sure of how PPM fits in



Hung for new opportunities

- 1,200 Current Users
- Embracing Agile
- Needs governance and transparency

NEW OPPORTUNITIES



Leveraging SAFe as an advantage

- 400,000 (PNCV)
- Agile initiatives
- Building an Agile Center of Excellence

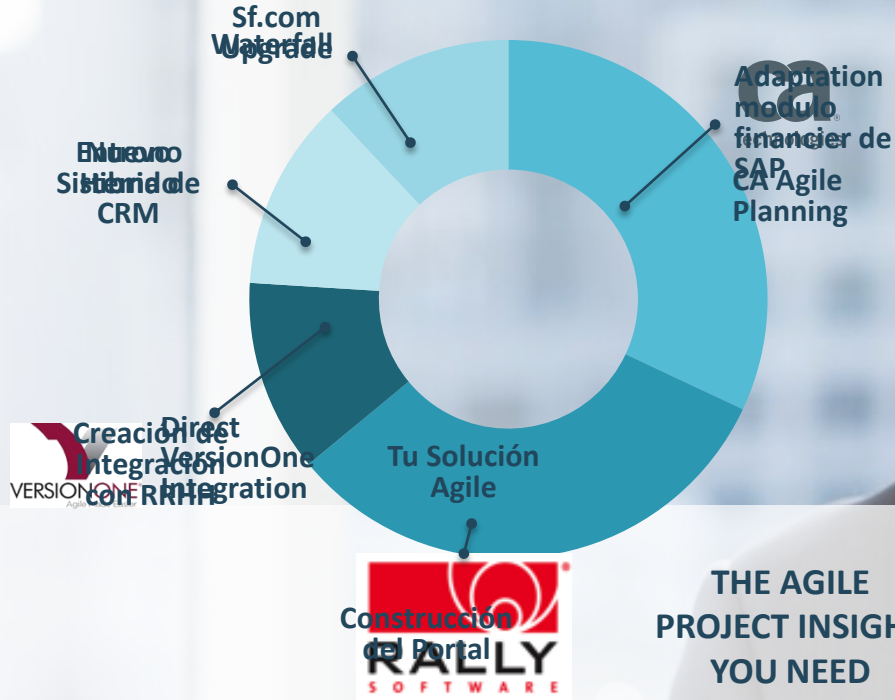


Leveraging SAFe as a door opener

- 13,000 Users
- Currently using HP PPM
- Looking at implementing SAFe

Visibilidad completa del Portfolio

CA PPM PORTFOLIO



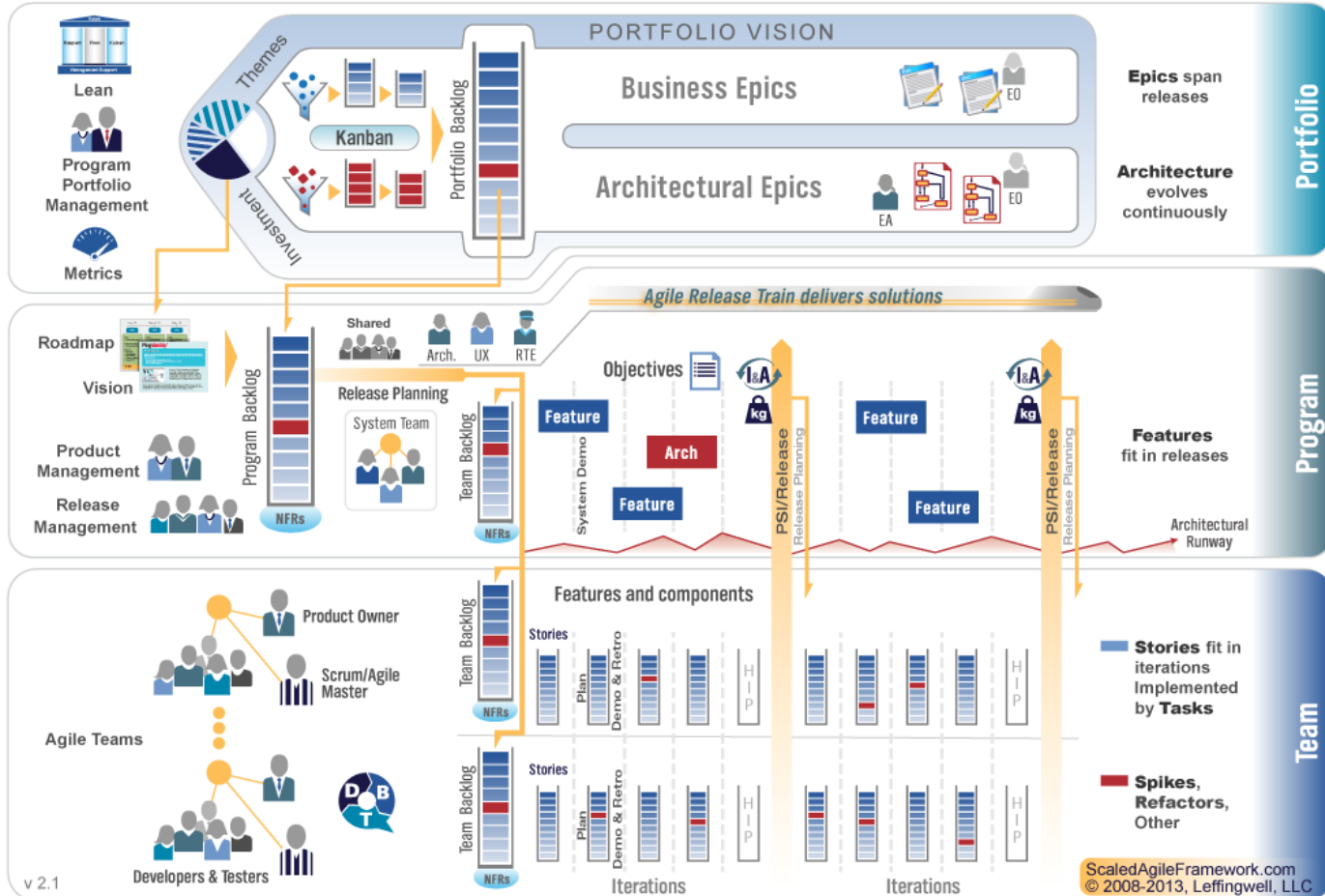
THE AGILE
PROJECT INSIGHT
YOU NEED

AGILE TOOLS ROLL
UP SEAMLESSLY
INTO CA PPM

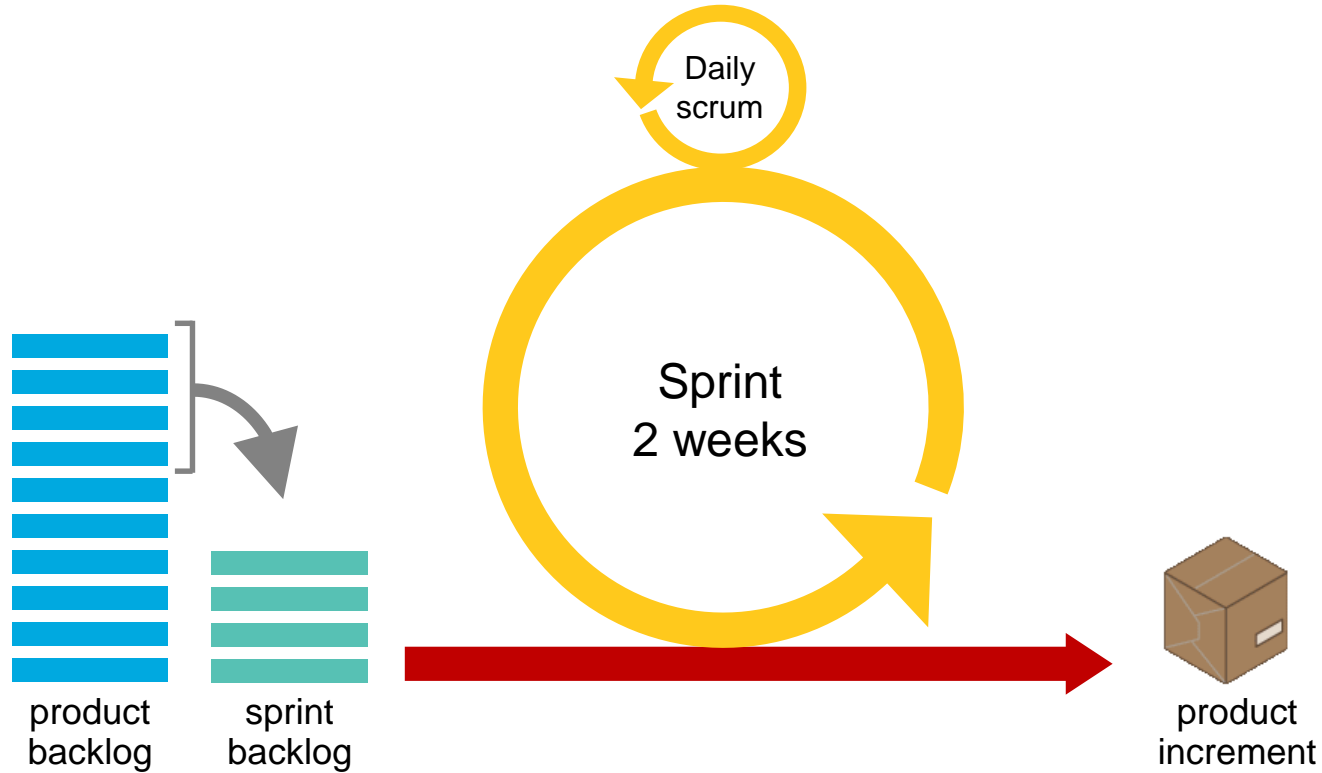


Rally : Acquisition Agreement

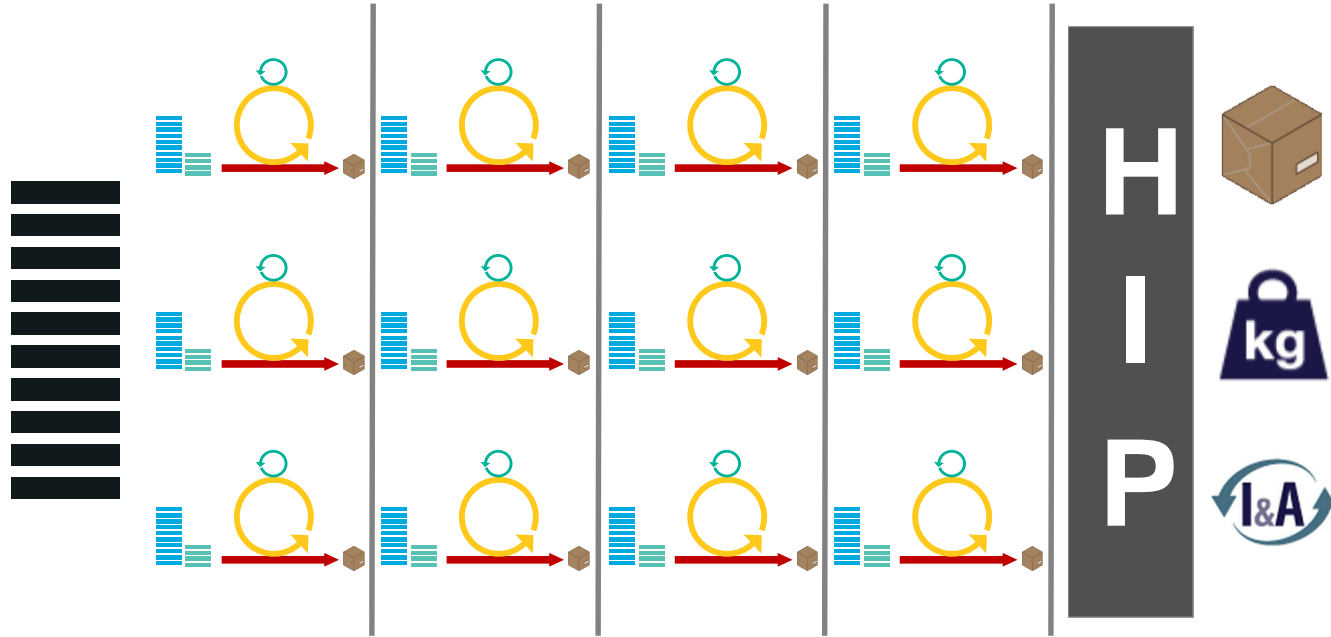
Scaled Agile Framework™ Big Picture



2 Weeks



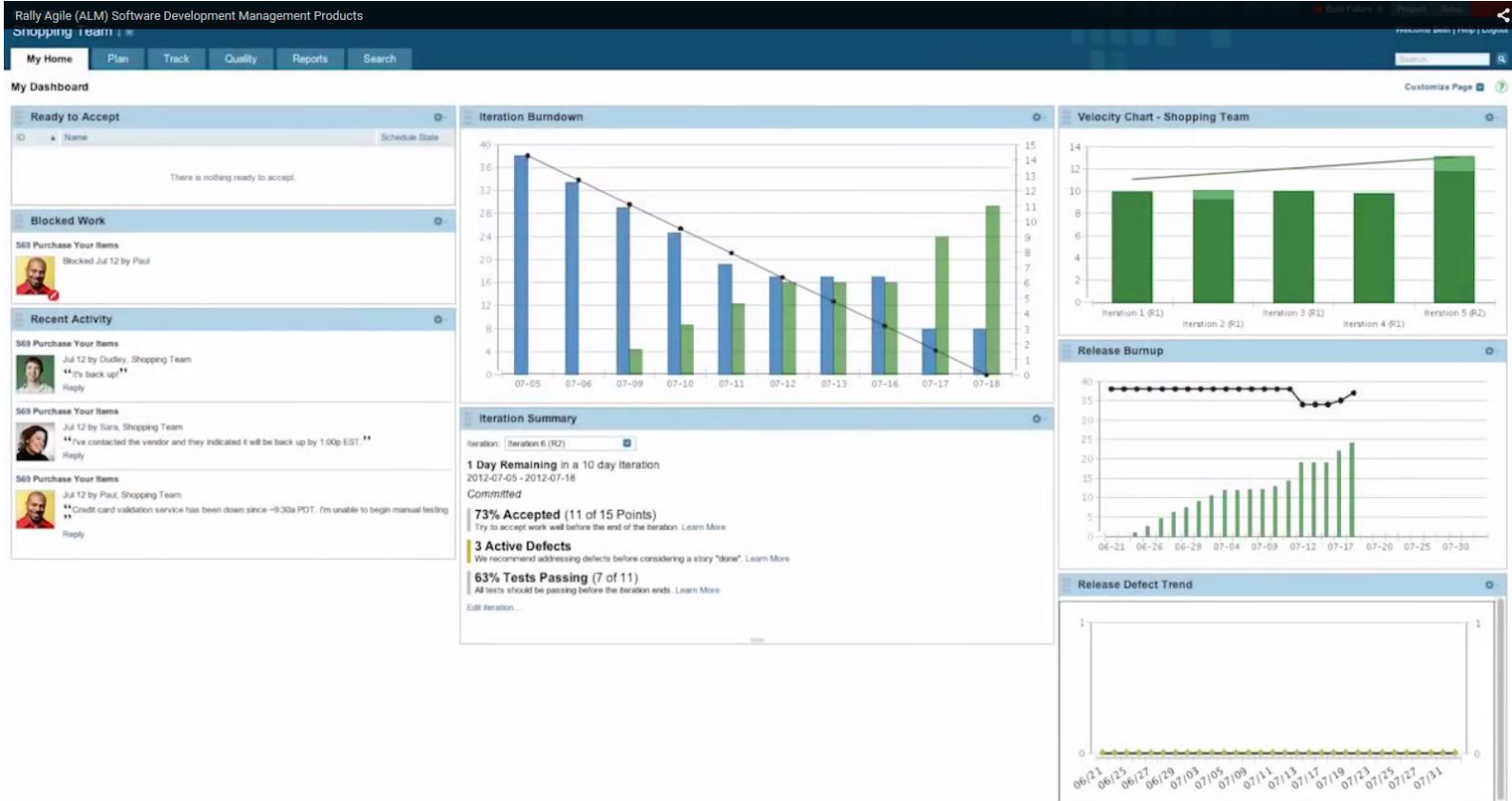
10 Weeks



Based on Leffingwell LLC and Scaled Agile Inc.



RALLY'S AGILE PROJECT MANAGEMENT SOLUTION



Rally Agile (ALM) Software Development Management Products
Consumer Site

My Home Plan Track Quality Reports Search

User Stories

Views: Default

Sorted By Rank Ascending

Rank	ID	Name	Release	Iteration	State	Plan Est	Task Est	To Do	Owner	Project
515		Epic: Shipping				12.0	35.0	8.0	Paul	Consumer Site
516		Epic: Payment Methods				8.0	35.0	11.0	Paul	Consumer Site
536		Payment - Promotional Codes	Release 2 (5.6.7)	Iteration 6 (R2)		2.0	12.0	6.0	Sara	Payment Team
537		Payment - Gift Certificates	Release 2 (5.6.7)	Iteration 6 (R2)		2.0	9.0	5.0	Paul	Payment Team
559		Payment - Supported Credit Cards	Release 1 (1.2.3.4)	Iteration 3 (R1)		4.0	14.0	0.0	Tom	Shipping Team
517		Epic: Order Management				6.0	0.0	0.0	Paul	Consumer Site
581		Combine Orders				3.0	0.0	0.0	Tom	Shipping Team
583		Order Modification				3.0	0.0	0.0	Tara	Shipping Team
518		Epic: Performance and Scalability				24.0	30.0	8.0	Paul	Consumer Site
563		Website must be available 24x7	Release 2 (5.6.7)	Iteration 5 (R2)		3.0	9.0	0.0	Tara	Shipping Team
564		Move to Oracle	Release 2 (5.6.7)	Iteration 5 (R2)		3.0	9.0	0.0	Tara	Shipping Team
565		System should support 10,000 concurrent users				17.0	8.0	8.0	Tara	Shipping Team
566		Move Server Room	Release 2 (5.6.7)	Iteration 5 (R2)		1.0	4.0	0.0	Tara	Shipping Team
528		Support backorder email notification				3.0	0.0	0.0	Paul	Fulfillment Team
532		Combine multiple items into single purchase order				1.0	0.0	0.0	Paul	Fulfillment Team
544		Log unsuccessful payment attempts				20.0	0.0	0.0	Paul	Payment Team
548		Install new 2048bit encryption key				3.0	0.0	0.0	Paul	Payment Team
554		Spike: Purchase your items	Release 1 (1.2.3.4)	Iteration 2 (R1)		2.0	8.0	0.0	Paul	Shipping Team
557		Check the Status of Your Order	Release 1 (1.2.3.4)	Iteration 2 (R1)		3.0	7.0	0.0	Paul	Shipping Team
560		Create Deployment Scripts	Release 1 (1.2.3.4)	Iteration 4 (R1)		3.0	10.0	0.0	Paul	Shipping Team
561		Mauna Loa Hardening	Release 1 (1.2.3.4)	Iteration 4 (R1)		4.0	11.0	0.0	Paul	Shipping Team
562		Resolve Performance Issues	Release 1 (1.2.3.4)	Iteration 4 (R1)		2.0	5.0	0.0	Paul	Shipping Team
567		Patch #1 - Mauna Loa	Release 2 (5.6.7)	Iteration 5 (R2)		2.0	4.0	0.0	Paul	Shipping Team
571		Spike: Cancel the Order	Release 2 (5.6.7)	Iteration 6 (R2)		1.0	3.0	0.0	Paul	Shipping Team
573		Search for items	Release 2 (5.6.7)	Iteration 7 (R2)		3.0	0.0	0.0	Paul	Shipping Team
574		Demo Support	Release 2 (5.6.7)	Iteration 7 (R2)		1.0	0.0	0.0	Paul	Shipping Team
577		Spike: Tax calculations	Release 2 (5.6.7)	Iteration 7 (R2)		1.0	0.0	0.0	Paul	Shipping Team
580		Change Method of Payment				3.0	0.0	0.0	Paul	Shipping Team
549		Add error message if credit card number length is < 16				1.0	0.0	0.0	Dave D	Payment Team

21 through 40 of 43

Display 20

☒ Backlog
 ☒ Defined
 ☒ In-Progress
 ☒ Completed
 ☒ Accepted
 ☒ Blocked

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2:00 / 3:44

Rally Agile (ALM) Software Development Management Products

Shopping Team

My Home Plan **Track** Quality Reports Search

Iteration Defect Status

Iteration 6 (R2)

	07-05	1 Day Remaining	07-18	Found	Active	Closed
				6	5	1

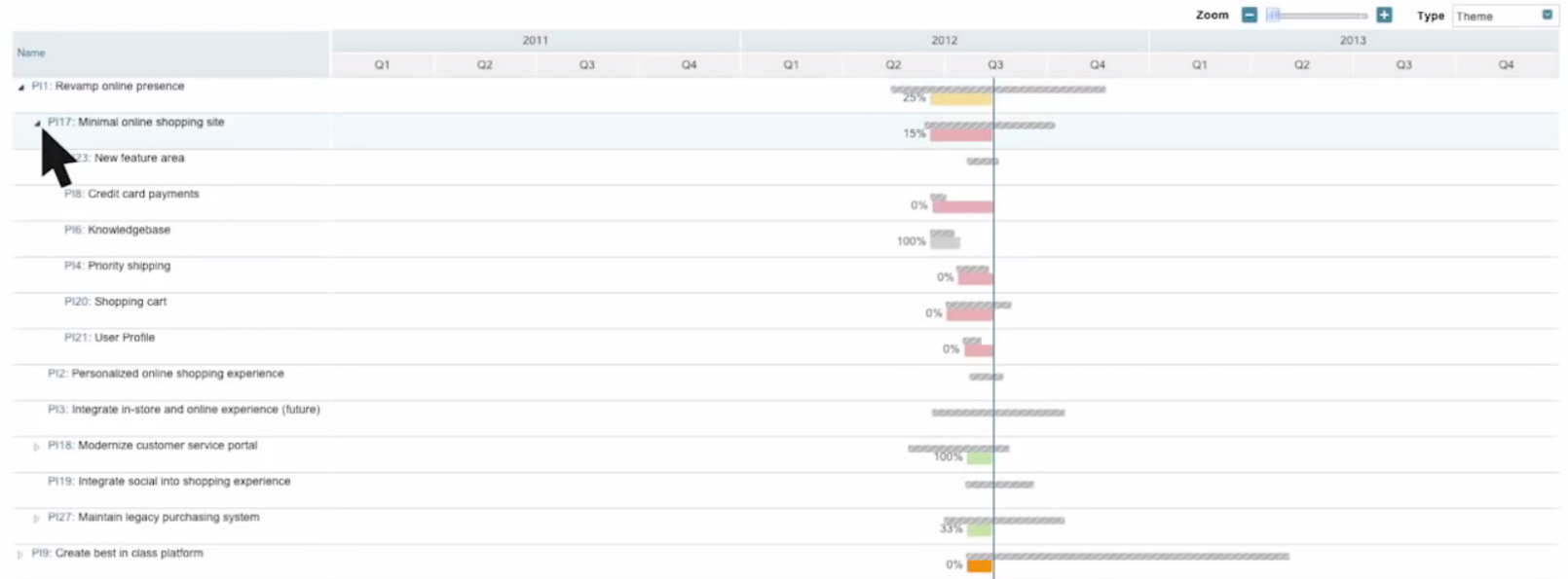
All	Rank	ID	Name	State	Priority
		DE27	Promo Code field label formatting is incorrect	B D P C A	4 - Low
		DE24	State drop down doesn't contain any items	B D P C A	2 - High Attention
		S72	Validate Customer Contact/Shipping info	B D P C A	P1: 0, P2: 0
		DE22	Recurring 'No Address' Warning	Fixed	3 - Normal
		S71	Spike: Cancel the Order	B D P C A	No defects
		S70	Persistent Shopping Cart	B D P C A	No defects
		S69	Purchase Your Items	B D P C A	P1: 0, P2: 1
		DE26	(Auto) Fitness Test Failed for GUI - Checkout Button	Open	2 - High Attention
		DE21	Only one selected item is being added to the cart	Fixed	3 - Normal
		S68	Recent Purchases View	B D P C A	No defects
		S83	Order Modification	B D P C A	No defects

B Backlog D Defined P In-Progress C Completed A Accepted ● Blocked

8 Items Display: 20

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Portfolio Timeline NEW



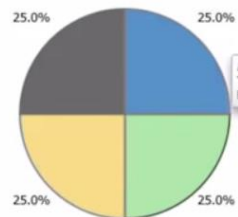
Legend Planned Late At Risk On Track Complete

Portfolio Alignments SHARED

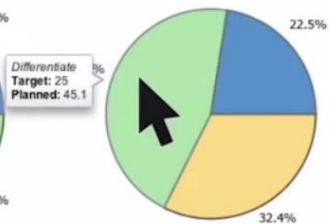
Portfolio Alignments

Type:  Differentiate Optimize None Neutralize Not Done

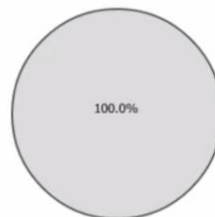
Target



Planned



Actual





Show Policies ?

Business Case (3/4)	Prioritize (2/6)	Build (4/3)	Measure (1/10)	Archive (0/∞)
<div>PI14 No Owner ? Integrate into Facebook 13 days in this column</div> <div>PI13 No Owner ? Build read-write API for handling orders 13 days in this column</div> <div>PI12 No Owner ? Re-build primary web app to use API 13 days in this column</div>	<div>PI3 Jackie Integrate in-store and online experience (future) 13 days in this column</div> <div>PI19 Jackie Integrate social into shopping experience 13 days in this column</div>	<div>PI17 Jackie Minimal online shopping site 15% 9 days in this column</div> <div>PI10 Jackie Create a read-only API 9 days in this column</div> <div>PI18 Jackie Modernize customer service portal 100% 13 days in this column</div> <div>PI27 Jackie Maintain legacy purchasing system 33% 13 days in this column</div>	<div>PI2 Jackie Personalized online shopping experience 13 days in this column</div>	

Scrum
is to *team*

as

SAFe
is to *enterprise*

Spain & Portugal

CA Clarity User Group Meeting

- CA Technologies

Wednesday, June 17, 2015