



ca World '17

CUSTOMER SUCCESS TEAM

Customer Resource Overview

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CA Technologies

CST01T



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CA Technologies

Getting Started With CA



1

Customer Resources

- ✓ **Meet** Global Customer Success
- ✓ **Register** for access

2

Product Resources

- ✓ **Training and Education**
- ✓ **Support Portal**
 - Product Information
 - Communities
 - Download Management
 - Case Management
- ✓ **Events**

Our Customer Promise

To consistently deliver a superior experience by putting your organization at the center of all we do. The ultimate measure of our success is through your success and earning your trust as a strategic partner.



**Invest to build
long-term relationships**



**Deliver innovative
business outcomes**



**Commit to each
customer's success**

Our People

700+ Engineers with decades of support experience and industry recognized continuing education programs

270+ Customer success & customer care team members focused on positive customer experience

We power the global innovation leaders that power the global economy.

13+ Years average tenure, with 9 major languages at over 25 worldwide sites

Your Contacts



Customer Success Manager
First Last
000-000-0000
first.last@ca.com

- Welcome to CA overview
- Schedule roadmap presentations
- Schedule check-in meetings
- Organize Pre-Upgrade Planning Reviews
- Engage resources for support escalations
- Organize Technical Workshops
- Share best practices

This will depend on services purchased



Customer Care Team
1 800 225 5224, Option 2
<https://communities.ca.com/community/customer-care>

- General questions
- Provides licensing
- Resets passwords
- Help with downloads
- Accessible via Communities and Phone by anyone in your organization



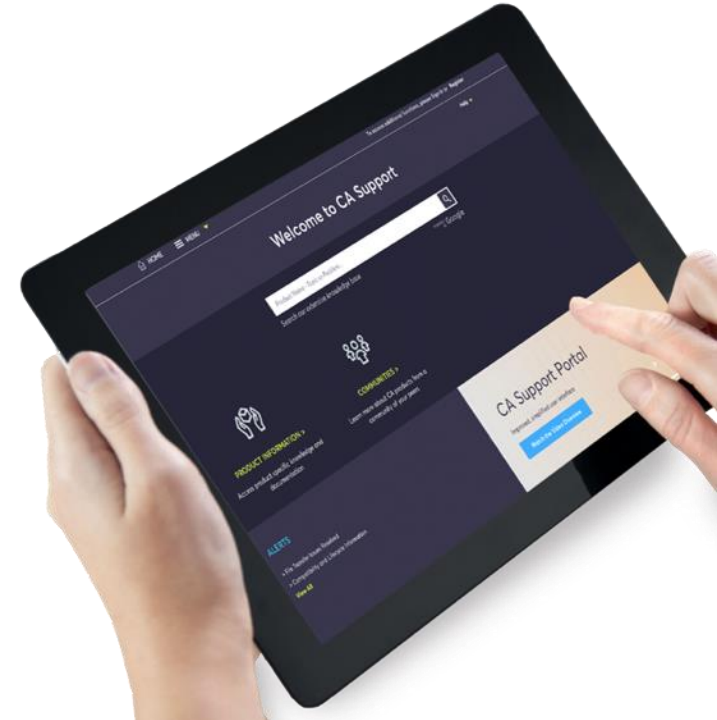
CA Support Team
1 800 225 5224, Option 2
[Support.ca.com](https://support.ca.com)

- Provides product support
- Provides chat support on many solutions
- Participates in communities
- Writes knowledge articles

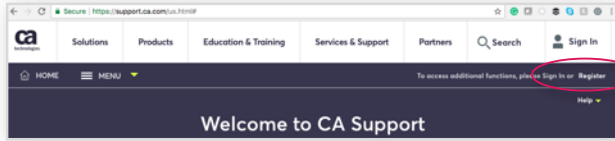
Registration Benefits

We encourage all users to register with their Enterprise Site Id to take advantage of the full suite of support resources.

Registration Benefits	Basic	Education	Support
CA Partner Portal			
Support case management			X
Premium support content			X
Customer Validation Program			X
Instructor-led and online courses		X	
Certification exams		X	
Webcasts	X	X	X
CA Communities	Limited view	X	X
Product Documentation	Limited view	X	X
Ca.com content	X	X	X



Registration starts at support.ca.com



ACCESS CAN TAKE UP TO 48 HOURS

Having trouble?
Click to chat with
Customer Care

A registration form for CA Technologies. The header says 'Register with CA Technologies' and 'Register once and gain access to: CA Technologies services, support, education, communities and partner resources.' Below the header are four options: Basic Access, CA Partner, CA Support, and CA Education. Each option has a description and a 'Select' button. The 'CA Support' button is circled in red. Below the options is a form with two columns: 'Basic Access Information' and 'Company/Location Information'. The 'Basic Access Information' column includes fields for Salutation, First Name, Last Name, Email Address, Password, Confirm Password, and Alias/Screen Name. The 'Company/Location Information' column includes fields for Company, Job Title, United States, Address 1, Address 2, City, State/Province, Postal Code, Phone, and Phone Extension. Below these columns are two sections: 'Support Access Information' and 'Education Access Information'. The 'Support Access Information' section includes fields for Type of Customer ID, Preferred Contact Method (Email, Phone), and Preferred Language. The 'Education Access Information' section includes fields for Time Zone and Site/Language. There are also 'CALL' and 'CHAT' buttons at the bottom left of the form.

Customers should select

- ✓ Basic Access
- ✓ CA Support
- ✓ CA Education

Use your **business email address** to access CA Support Content

Select Enterprise Support Access, then enter your Enterprise Site ID

Already registered? Update Your Profile

If you previously registered for Basic Access and need to add support, simply edit your profile.

The screenshot shows the 'My Profile' page with the following elements:

- Top Navigation:** A 'Sign In' button with a user icon and a 'My Profile' button with a user icon.
- Instructions:**
 - 1. Click Sign in from ca.com
 - 2. Click My Profile in top right corner
 - 3. Select Edit at the bottom of your profile
- Profile Header:** 'My Profile' title and a message: 'Keep your profile up-to-date to maximize your CA Technologies online experience and ensure that you have access to the latest information and resources.'
- Tabs:** 'Basic Access', 'CA Partner', 'CA Support', and 'CA Education'. The 'CA Support' tab is highlighted with a callout box.
- Content Area:**
 - Basic Access Information:** Salutation: Ms., First Name: Rachel, Last Name: Macik, Email Address: macra02@ca.com, Password: ***** [change password], Alias/Screen Name: Rachel_Macik.
 - Company/Location Information:** Company: CA Technologies, Job Title: Sr Principal Product Marketing, CX, Country: United States, Address 1: 713 625 9421, Address 2:, City: Houston, State/Province: Texas, Postal Code: 77040, Phone: 1-800-225-5224, Phone Extension:, Time Zone: (GMT-06:00)Central Time(US & Canada), Site/Language: United States - English.
- Edit Button:** A button labeled 'Edit' at the bottom right of the profile information.

Product Resources



1

Customer Resources

- ✓ **Meet Global Customer Success**
- ✓ **Register for access**

2

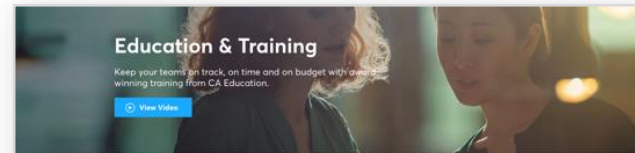
Product Resources

- ✓ **Training and Education**
- ✓ **Support Portal**
 - Product Information
 - Communities
 - Download Management
 - Case Management
- ✓ **Events**

Training and Education

www.ca.com/education

- [Learning Paths](#)
- [Certification](#)
- [Self Directed or Instructor Led Training](#)




Education & Training

Keep your team on track, on time and on budget with award-winning training from CA Education.

[View Video](#)

Personalized learning. Powerful doing.

Business is pass or fail. Make sure your people get the education and training to take your business to the next level. CA Education offers a library of over 400 courses to help your teams get the very most from every CA solution. It's learning designed with doing in mind—helping you to improve user adoption and productivity, reduce your reliance on external support and maximize your investment to create a competitive edge.




1 hour of training saves 5 hours of lost productivity.


[View the CA Education story >](#)

Know more. Start now.


More than 25,000 courses a year. Taught by award-winning instructors who average more than 20 years of experience and boast a 94 percent satisfaction rating. This is the place to learn. Now is the time to start.




Find Your Learning Path




Find a Course



Log in/Sign up for Training



Free Training




CA Learning Management

Learn something new. Achieve something extraordinary.

[Search the Catalog](#) [My Learning Dashboard](#) [Universities](#)

[Product Training](#) [Product Certification](#)



CA Project & Portfolio Management 15.2 Learning Paths

for Customers

LEARNING PATHS

All Roles

- CA PPM 15.2: Product Overview 100 [View](#) [eLearning](#) [330LR100](#)
- Project Management [View](#) [eLearning](#) [330LR240](#)
- Portfolio Management [View](#) [eLearning](#) [330LR240](#)
- Financial Management [View](#) [eLearning](#) [330LR240](#)
- Resource Management [View](#) [eLearning](#) [330LR240](#)
- Time Management [View](#) [eLearning](#) [330LR240](#)
- Report Management / Jaspersoft [View](#) [eLearning](#) [330LR240](#)
- Business Administration [View](#) [eLearning](#) [330LR240](#)

All Roles

- CA PPM 15.2: Product Overview 100 [View](#) [eLearning](#) [330LR100](#)
- CA PPM 15.2: Cumulative Differences 200 [View](#) [eLearning](#) [330LR240](#)
- OnDemand CA PPM 15.2: Core Components 200 [View](#) [eLearning](#) [330LR240](#)
- OnDemand CA PPM 15.2: Time Management 200 [View](#) [eLearning](#) [330LR240](#)
- OnDemand CA PPM 15.2: Demand Management 200 [View](#) [eLearning](#) [330LR240](#)
- CA PPM: Video Playlist [View](#) [eLearning](#) [330LR240](#)

Free Training

ca.com/freetraining

Take advantage of valuable content designed to help you make the most of your investment.

Free Training

CA offers free training that is web-based and easily accessible.

Free Product Training Courses

Explore our catalog of free, web-based, product training courses below. Don't see what you're looking for? More free Web-based trainings can be found in our [full-course catalog](#).

COURSE TITLE	DESCRIPTION	ADDITIONAL LINKS
API Management		
4 OFFERING(S)		
Application Development		
6 OFFERING(S)		
Automation		
1 OFFERING(S)		
Continuous Delivery		
6 OFFERING(S)		

COURSE TITLE	DESCRIPTION	ADDITIONAL LINKS
CA PPM 15.2: Product Overview 100 >	This course is designed to describe to PMO leaders how CA PPM can be used to empower their organizations to seamlessly manage services, projects, products, people and financials.	Learning Paths > Community >
CA PPM 15.2: Cumulative Differences 200 >	This course covers the major functional enhancements and changes for CA Clarity PPM 14.1, CA Clarity PPM 14.2, CA PPM 14.3, CA PPM 14.4, CA PPM 15.1 and CA PPM 15.2.	Learning Paths > Community >
CA PPM 15.1: Data Warehouse Management 300 >	This class will explain the benefits of the data warehouse and the reporting challenges that it addresses. You will also be taught about setting up the data warehouse and managing its schema. This course will help you remedy the causes of performance issues and manage the data warehouse schema effectively.	Learning Paths > Community >

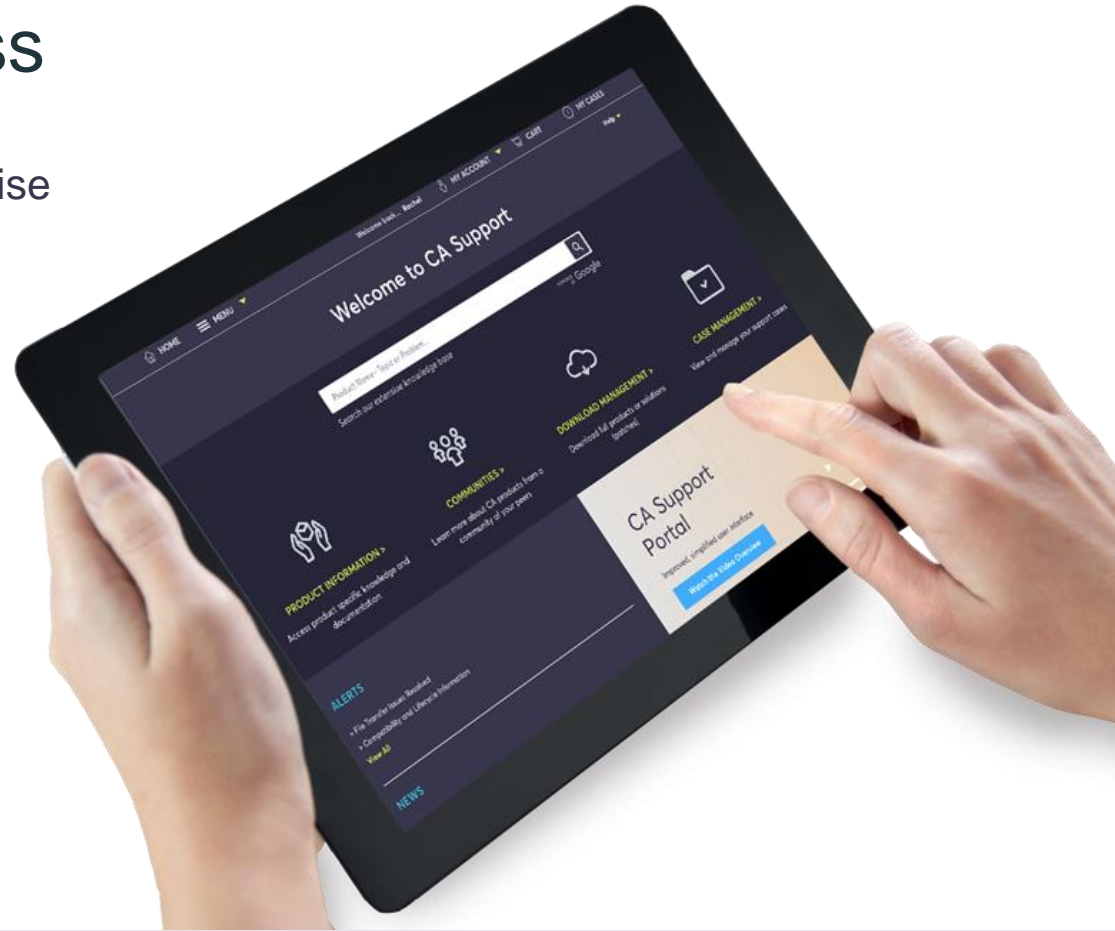
Support Portal Access

Your registration details and Enterprise Site ID determine entitlement for support.ca.com.

Entitlement enables:

- Product and solution downloads
- Support case initiation and management

support.ca.com



Need help?

Open a Customer Care Case

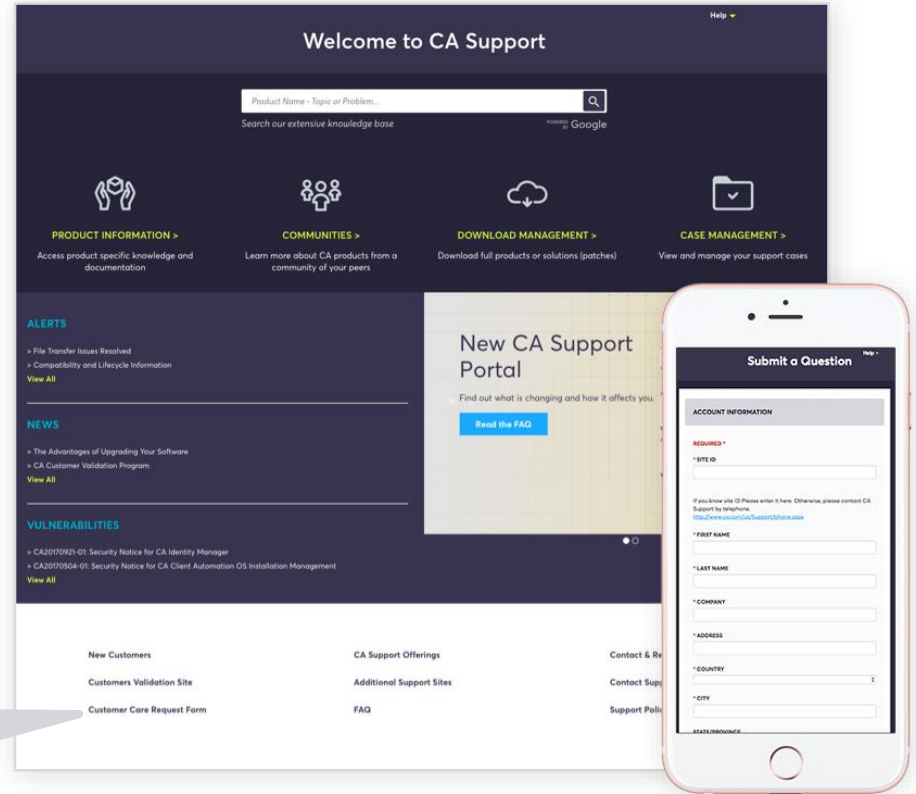
18002255224 Option 2

Non-Technical Assistance

- General questions
- Provides licensing
- Reset password
- Download assistance

Search the [Customer Care Community](#) for FAQ or to ask a question

From support.ca.com, scroll to the bottom and click, Customer Care Request Form



Product Information and Self-service Support

Staff Selection

- Product information chosen by the CA Product Owner

Solutions

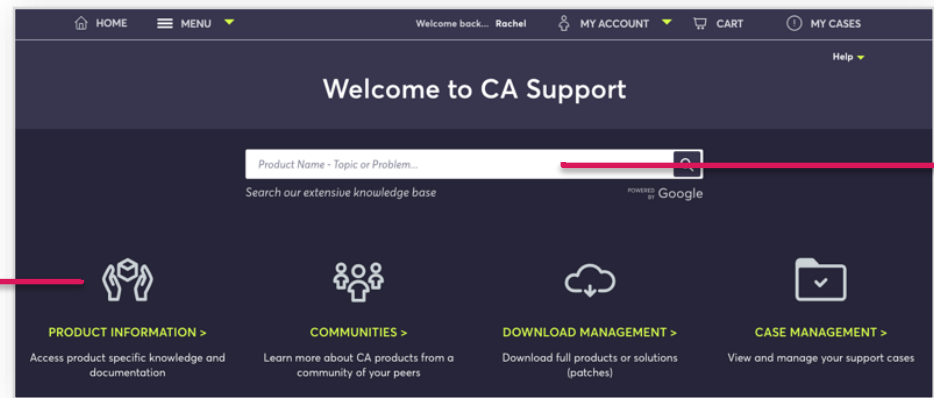
- Published solutions/fixes

Knowledge Base

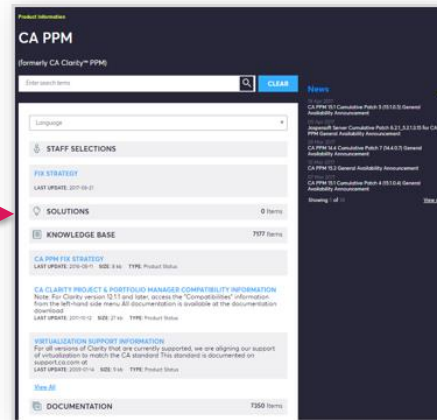
- Knowledge Base Articles, Problems, Product Status

Documentation

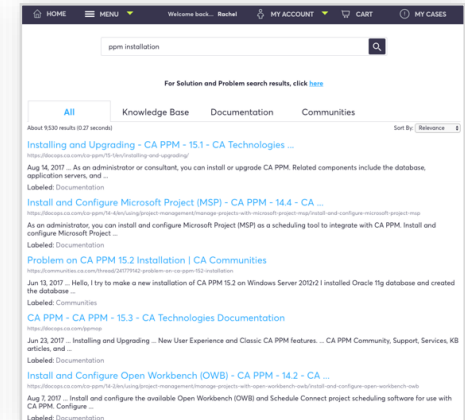
- DocOps – Release specific



Browse Product Information Pages



Use Google Search



Product Documentation

docops.ca.com

Official documentation from the CA Product Teams. This includes links to multiple resources for running the solution as well as getting started and installation.

Release Specific

The screenshot displays the CA PPM documentation website. The top navigation bar includes links for 'Why CA', 'Products', 'Education & Training', 'Services & Support', 'Partners', and 'My Account'. A left-hand navigation menu lists various topics such as 'Getting Started with CA PPM', 'Release Information', 'Installing and Upgrading', 'Using', 'Reporting', 'Administrating', 'Reference', 'Add-Ins and Connectors', 'Education', 'Communities and Social Collaboration Support and CA Services Knowledge Base', and 'Popular Links'. The main content area features an 'Announcements & News' section with three items: 'Not Seeing What the Documentation Says You Should Be Seeing?', 'Announcing the CA PPM DocOps Platform', and 'New to Jaspersoft Reporting? We Can Help - Learn More'. Below this is a 'Tip' section stating that all content appears when logged in. Three featured boxes highlight 'Getting Started', 'Release Information', and 'Installing and Upgrading'. A 'Using' section lists 'Manage project resources, an' and 'Mobile time s'. A 'Reference' section lists 'Access rights, schema chan', 'reference, XC', and 'glossary, (Lo'. A 'Communities Collaboration' section is partially visible. A search overlay is active, showing 'Product Information' and 'CA PPM (formerly CA Clarity™ PPM)'. It includes a search bar with 'Enter search terms' and a 'CLEAR' button. Below the search bar is a 'Filter Search Result' section with several dropdown menus: 'Component' (set to 15.2), 'Documentation' (set to Documentation), 'Year - All', 'English', 'Date (Newest)', and 'File Type'.

What are the online CA Communities?



Global Success Team
Sydney Australia

We launched the CA Communities to facilitate conversations between users of all levels to offer opportunities for product onboarding, customizations, and improvements. Each community is organized by product or by general information. Don't be afraid to ask a question... there are literally thousands of people waiting to respond.



General Information

- [Customer Care Community](#) is hosted by the Customer Care team and is most helpful for new users
- [The Water Cooler Community](#) hosts general information and training for the communities platform

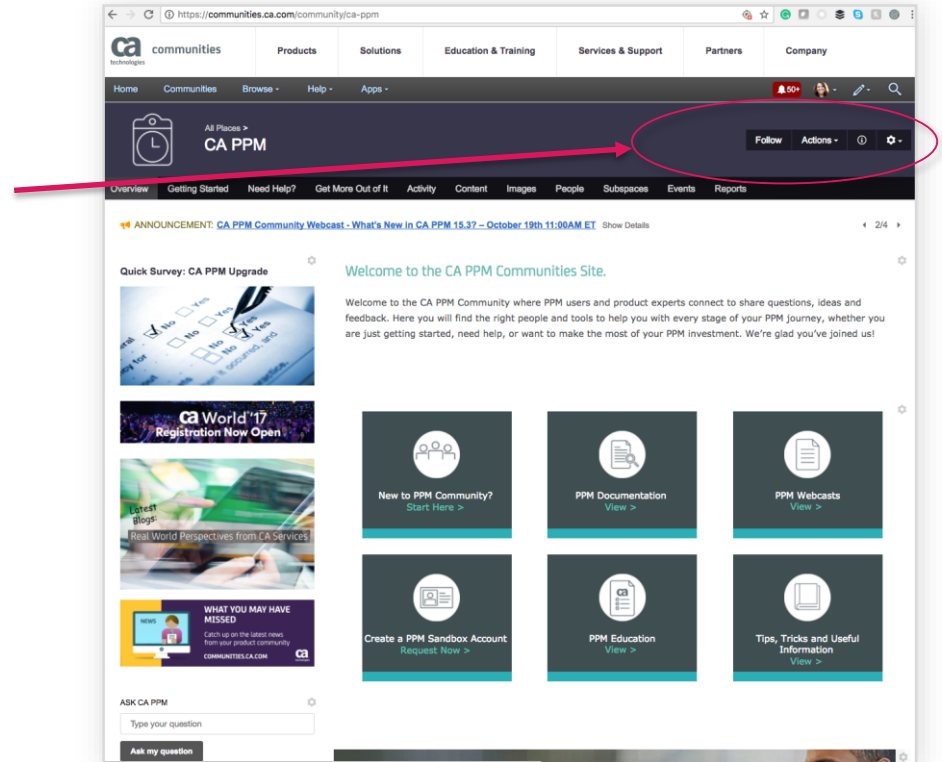
communities.ca.com

Follow Your Product Community

Blog posts | Install & Upgrade information | Q & A | Polling Videos | Support Engineers Roadmap Webcasts



<https://communities.ca.com/docs/DOC-231166155>



Product Roadmaps & Feedback Sessions

Gain firsthand knowledge about upcoming product functionality and features along with architectural enhancements

ca.com/roadmap

The screenshot shows the CA Technologies website's 'Product Roadmaps & Feedback Sessions' page. The header includes navigation links: Free Trials, Communities, CA for Developers, North America (English), My Profile, and Search. The main banner features the title 'Product Roadmaps & Feedback Sessions' with the tagline 'Together, let's shape the future of CA.' and an illustration of a map with a location pin. Below the banner, a paragraph explains the purpose of the sessions. The 'Product Roadmap Sessions' section lists two sessions: 'CA Application Performance Management' (roadmap as of August 2017) and 'CA Service Virtualization' (roadmap as of July 2017). Each session includes a list of dates and a 'Register' button.

Free Trials Communities CA for Developers North America (English) My Profile Search

ca technologies

Products Solutions Education & Training Services & Support Partners Company

Product Roadmaps & Feedback Sessions

Together, let's shape the future of CA.

We are always listening to our customers, and one of the most common requests we receive is for the insight into roadmaps for our products. You can now join your industry peers to hear directly from our product management team about the future direction of our products. By attending the product roadmap and feedback sessions, you'll gain firsthand knowledge about upcoming product functionality and features along with architectural enhancements. At CA, we strive to eliminate the barriers between your ideas and the business outcomes you seek.

Product Roadmap Sessions

CA Application Performance Management

(Roadmap as of August 2017)

Click 'Register' to select session

- October 19, 2017 11 AM EDT
- October 19, 2017 10 PM EDT
- December Dates: Coming Soon!
- January Dates: Coming Soon!
- February Dates: Coming Soon!
- March Dates: Coming Soon!

Register

CA Service Virtualization

(Roadmap as of July 2017)

Click 'Register' to select session

- October 25, 2017 3 PM EDT
- December 5, 2017 11 AM EDT
- December 12, 2017 10 PM EDT
- January Dates: Coming Soon!
- February Dates: Coming Soon!
- March Dates: Coming Soon!

Register

Chat Contact Email

Ideation

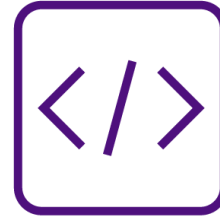
Direct Say in CA Technologies Products Roadmap



Submitting ideas for
product
enhancements



Voting on discussing
ideas from other
community members



Opting into product validation programs to
test incremental process and provide
feedback that will influence the next
iteration

For more details on how to submit the Ideas on the Community follow the [video](#)

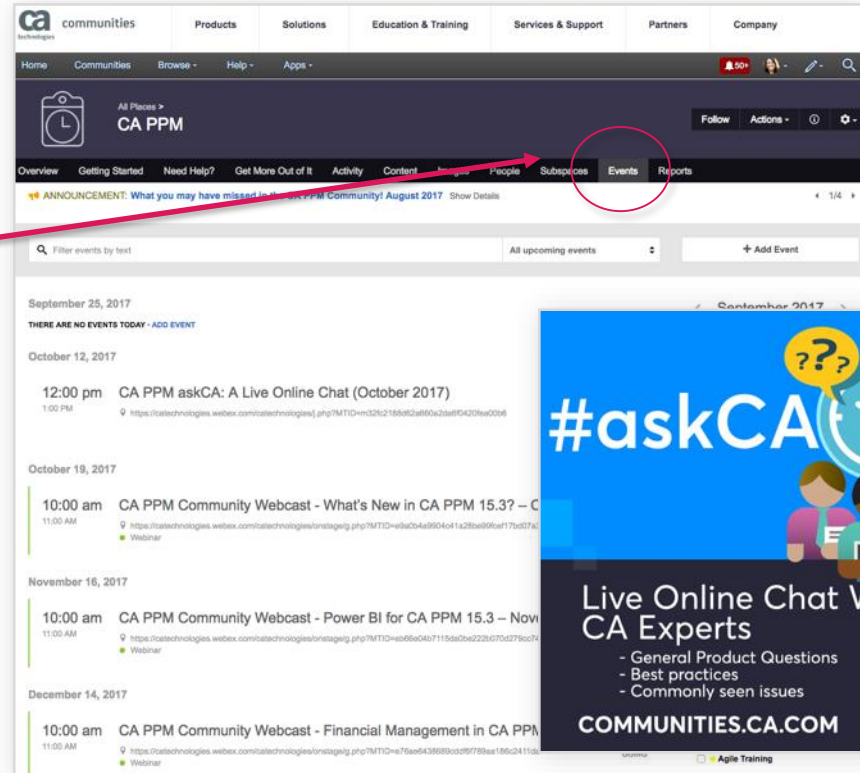
Ask CA Online Chat

Click the Events tab in your product community

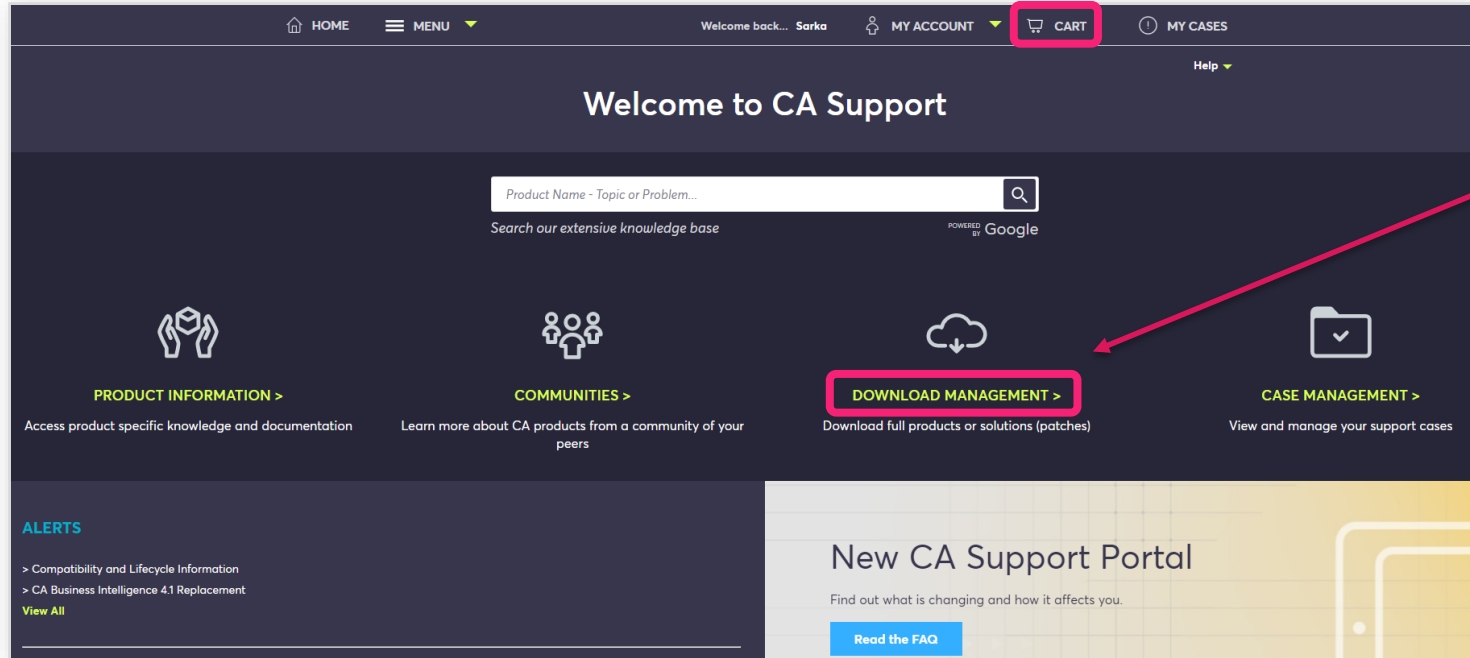
Ask CA (formerly Office Hours) is a popular way to get fast answers to questions. It takes the format of on-line chat, but is staffed by numerous CA experts in Sales, Marketing, Engineering, Support etc.



communities.ca.com



Product and Solution Downloads

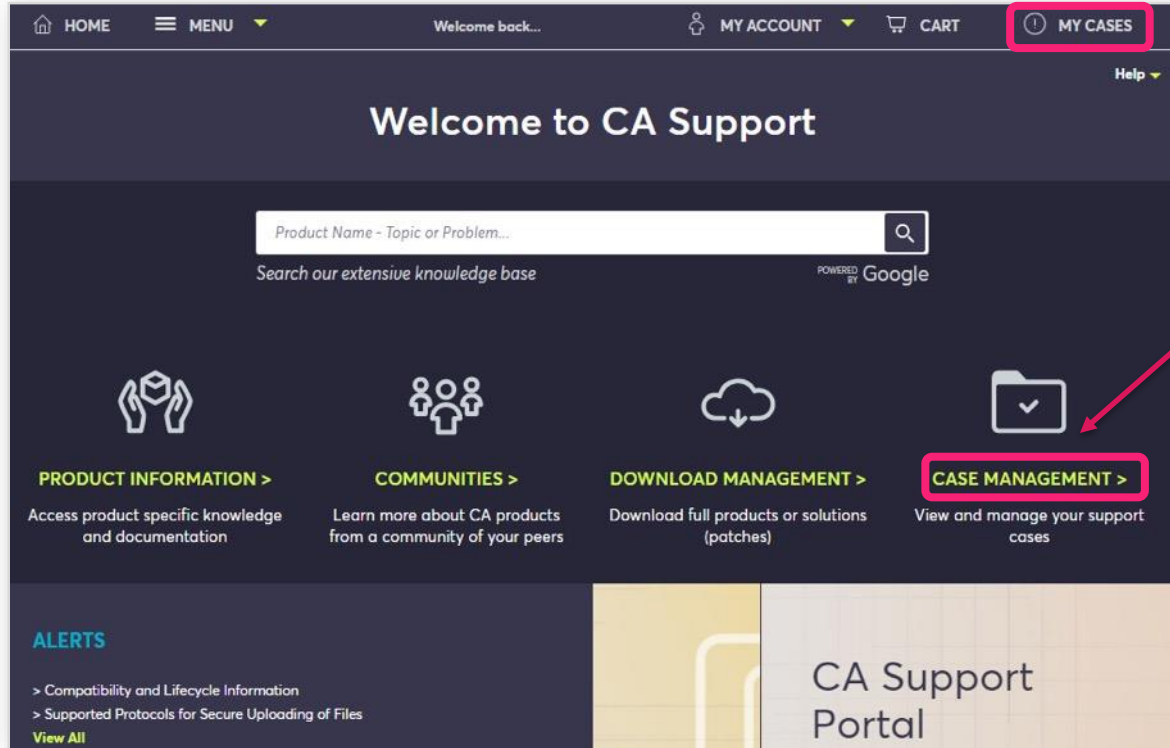


Product and Solution Downloads

The screenshot displays a web application titled "Download Management". At the top, there is a navigation bar with links for HOME, MENU, MY ACCOUNT, CART, and MY CASES. A welcome message "Welcome back..." is visible. Below the navigation bar, there are links for "Change Download Preference" and "Help". The main content area features a search bar labeled "Search By Product Name ..." with a dropdown arrow and a "CLEAR" button. Below the search bar, there is a grid of eight product cards, each showing the number of available product and solution downloads. The products listed are 2E, ACCUCHECK, ACF2, ACF2 VSE, ACM/MLINK, ADVANCED AUTHENTICATION, ADVANCED AUTHENTICATION MAINFRAME, and ADVANTAGE DATA TRANSFORMER.

Product	Product Downloads Available	Solution Downloads Available
2E	12	✓
ACCUCHECK	1	✓
ACF2	16	✓
ACF2 VSE	1	✓
ACM/MLINK	1	✓
ADVANCED AUTHENTICATION	17	✓
ADVANCED AUTHENTICATION MAINFRAME	2	✓
ADVANTAGE DATA TRANSFORMER	10	✓

Case Management



Create a New Case

Online

- Enter product info
- Fill in your case info
- Provide contact information

By Phone

- 18002255224 Option 1
- For Global Support numbers go to www.ca.com/phone
- Have your Enterprise Site ID ready
- This approach **MUST** be used if a case is a 'Severity 1'

The screenshot shows the 'Create New Case' form in the CA World interface. The form is divided into several sections with labels and input fields:

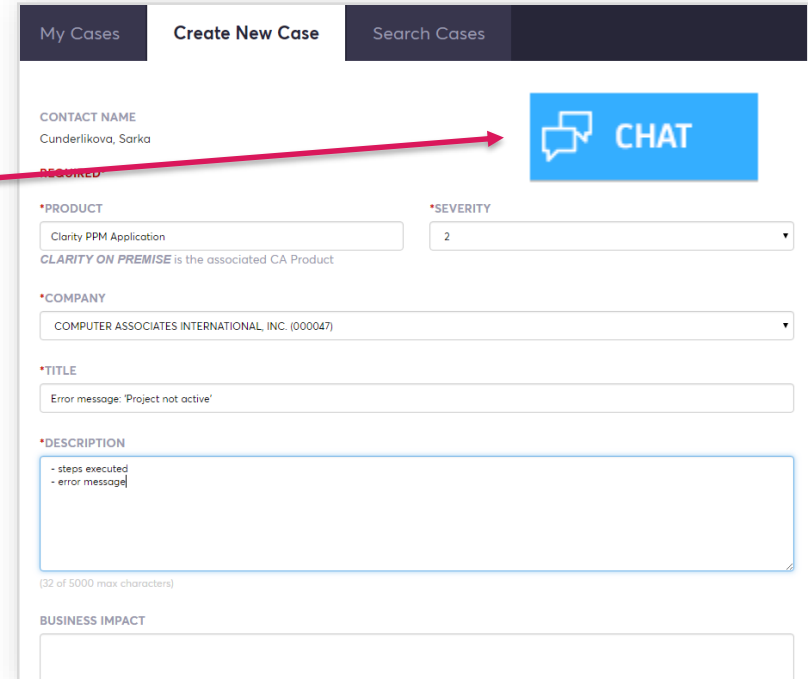
- My Cases** | **Create New Case** | Search Cases
- CONTACT NAME**: Cunderlikova, Sarka
- REQUIRED***
- *PRODUCT**: Clarity PPM Application
- *SEVERITY**: 2
- CLARITY ON PREMISE** is the associated CA Product
- *COMPANY**: COMPUTER ASSOCIATES INTERNATIONAL, INC. (000047)
- *TITLE**: Error message: 'Project not active'
- *DESCRIPTION**: - steps executed
- error message|
- (32 of 5000 max characters)
- BUSINESS IMPACT**

Chat Instead of Opening a Ticket

Have a quick question?

When chat is available, a “CHAT” icon will appear once you have selected your product.

Chat is a great option for quick questions that do not require too much technical troubleshooting.



The screenshot shows a web interface for creating a new case. At the top, there are three tabs: 'My Cases', 'Create New Case' (which is active), and 'Search Cases'. Below the tabs, the form is divided into several sections. The first section is 'CONTACT NAME' with the value 'Cunderlikova, Sarka'. Below this is a red 'ASSIGNED' label. The next section is 'PRODUCT', which has a dropdown menu showing 'Clarity PPM Application'. Below this, it says 'CLARITY ON PREMISE is the associated CA Product'. The 'SEVERITY' section has a dropdown menu showing '2'. The 'COMPANY' section has a dropdown menu showing 'COMPUTER ASSOCIATES INTERNATIONAL, INC. (000047)'. The 'TITLE' section has a text input field with the value 'Error message: 'Project not active''. The 'DESCRIPTION' section has a large text area with the value '- steps executed' and '- error message'. Below this, it says '(32 of 5000 max characters)'. The 'BUSINESS IMPACT' section has a text input field. A red arrow points from the text 'CHAT icon will appear once you have selected your product.' to a blue 'CHAT' button with a speech bubble icon, which is located in the top right corner of the form.

My Cases Create New Case Search Cases

CONTACT NAME
Cunderlikova, Sarka

ASSIGNED

*PRODUCT
Clarity PPM Application
CLARITY ON PREMISE is the associated CA Product

*SEVERITY
2

*COMPANY
COMPUTER ASSOCIATES INTERNATIONAL, INC. (000047)

*TITLE
Error message: 'Project not active'

*DESCRIPTION
- steps executed
- error message
(32 of 5000 max characters)

BUSINESS IMPACT

CHAT

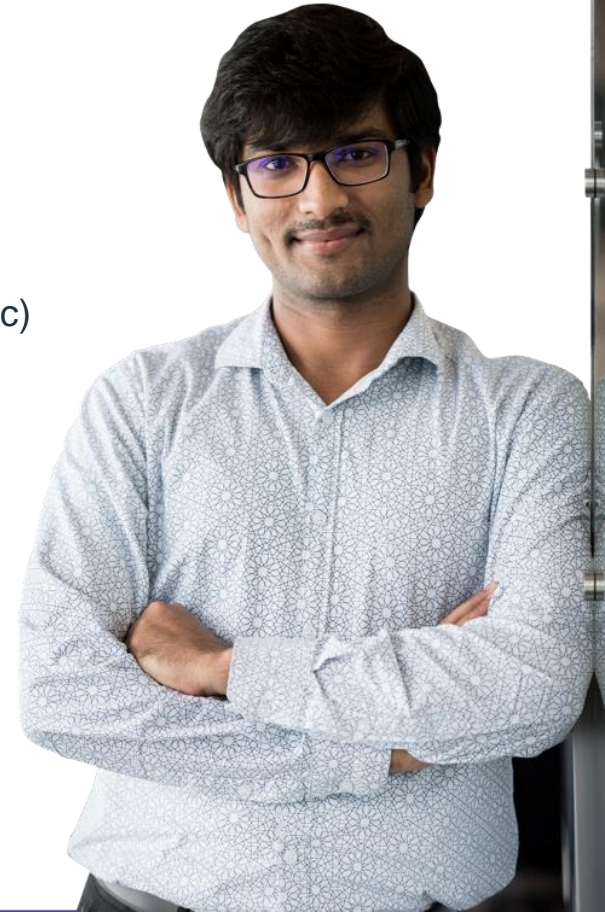
Opening a Case – Tips

Give as much relevant information, as soon as possible

- Your Enterprise Site Id (if raising by phone)
- The CA product you are using (API Management SaaS)
- Environmental details (release level, probe versions, OS / DB info etc)
- Error messages / unusual behavior
- Documentation (logs, screenshots etc.)
- Steps to reproduce
- Business impact as well as any deadlines or project plans

Partner with Support to work toward resolution

- Execute diagnostics as requested by CA and inform CA of results
- Communicate directly with CA to verify problem and provide detailed info
- Validation of case resolution



Determining Issue Priority

Define the Severity Based on Business Impact/SLOs

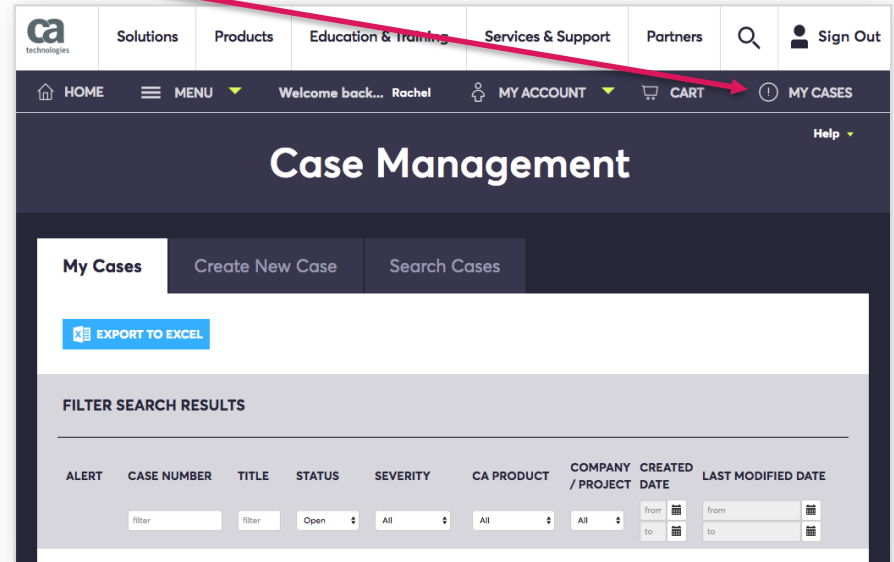
Severity	SLO	Service Level Description
1	1 Hour	"System Down" or product inoperative condition impacting a production environment. *Via Phone Only
2	2 Business Hours	High-impact business condition, the software may operate but is severely restricted.
3	4 Business Hours	Low-impact business condition with a majority of software functions still usable.
4	1 Business Day	Minor problem or question that does not affect the software function.

"Severity 1" means System Down or a product-inoperative condition impacting a production environment for which no workaround is immediately available, such as (i) production server or other mission critical systems are down; (ii) a substantial portion of mission-critical data is at a significant risk of loss or corruption; (iii) a substantial loss of service; (iv) business operations have been severely disrupted; or (v) an incident in which the software causes catastrophic network or system failure or that compromises overall system integrity or data integrity when the software is installed or when it is in operation (i.e., system crash, loss or corruption of data, or loss of system security) and significantly impacts ongoing operations in a production environment

Manage Your Support Cases

You can keep track of your cases on the CSO home screen. Check under the section 'My Cases' or you can call CA Support for further assistance.

'My Cases' changes to 'Cases Pending' when there are cases pending action from your team.



Case Escalation

Ensure case is at the appropriate severity level.

To escalate an existing support case if the business impact has changed, or it is not progressing appropriately, there are 2 options:

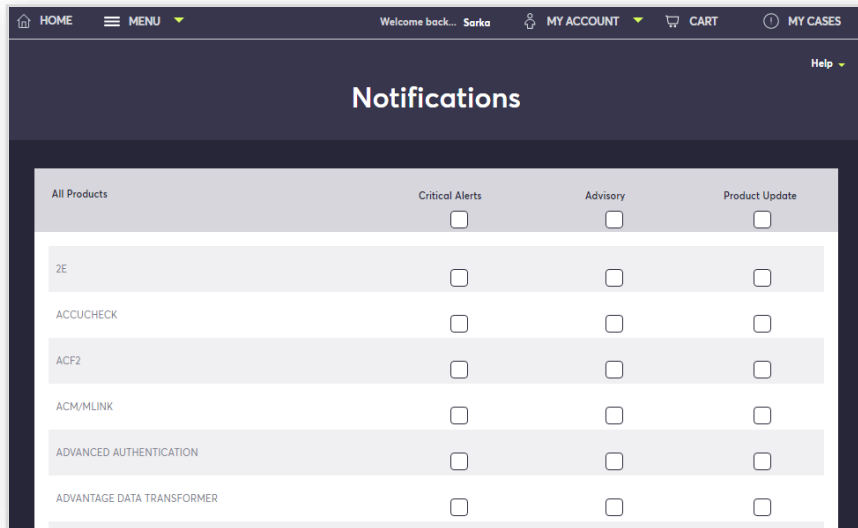
- Call CA Customer Support (18002255224 Option 1)
 - Give the support case number
 - Ask to speak to a CA Support Manager
 - Explain the situation
- Update the Support Case with the comment requesting a Support Manager contact you

If further escalation is required, please contact your CA Customer Success Manager



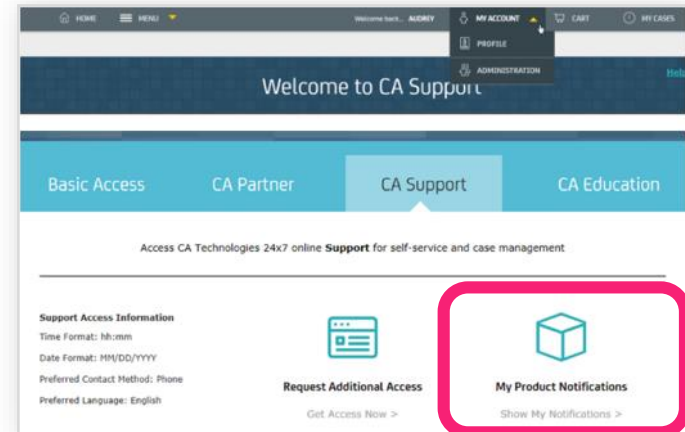
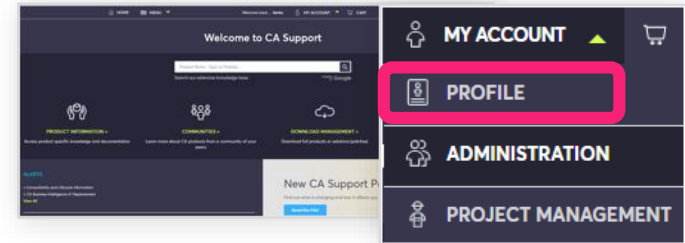
Product Notifications

- Be the first to know when product status changes
- Opt in for critical alerts, advisory notifications and product updates



All Products	Critical Alerts	Advisory	Product Update
2E	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCUCHECK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACF2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACM/MLINK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADVANCED AUTHENTICATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADVANTAGE DATA TRANSFORMER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

support.ca.com/irj/portal/hyperSubscription



How can Customer Success help you?



Welcome to CA

- Familiarize you with our support tools and resources
- Organize implementation planning reviews

Adopting our Solutions

- Coordinate hands-on Technical Workshops
- Organize pre-upgrade planning reviews
- Keep you informed of release updates and fixes

Ensuring Your Success

- Schedule strategic business driving conversations
- Enable fast issue resolution

Partnering with CA

- Ensure your feedback is heard
- Plan Roadmap sessions
- Case Studies
- CA World Speaking opportunities

Useful Links



[Main CA Contact Numbers](#)

[User Case Studies](#)

[CA Support Site](#)

[CA YouTube Chanel](#)

[General CA Support Policies](#)

[Training Courses
and Paths](#)

[Product Notification
Registration](#)



For the **General CA Support Policies**, change the link for the correct language: [Link here](#)

Questions?

Thank you.

Stay connected at
<https://communities.ca.com/community/customer-care>