

CA AGILE MANAGEMENT

CA Project & Portfolio Manager Vision and Roadmap

Presented to the CA PPM Nordics User Group, Malmö January 19, 2017

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PPM evolution

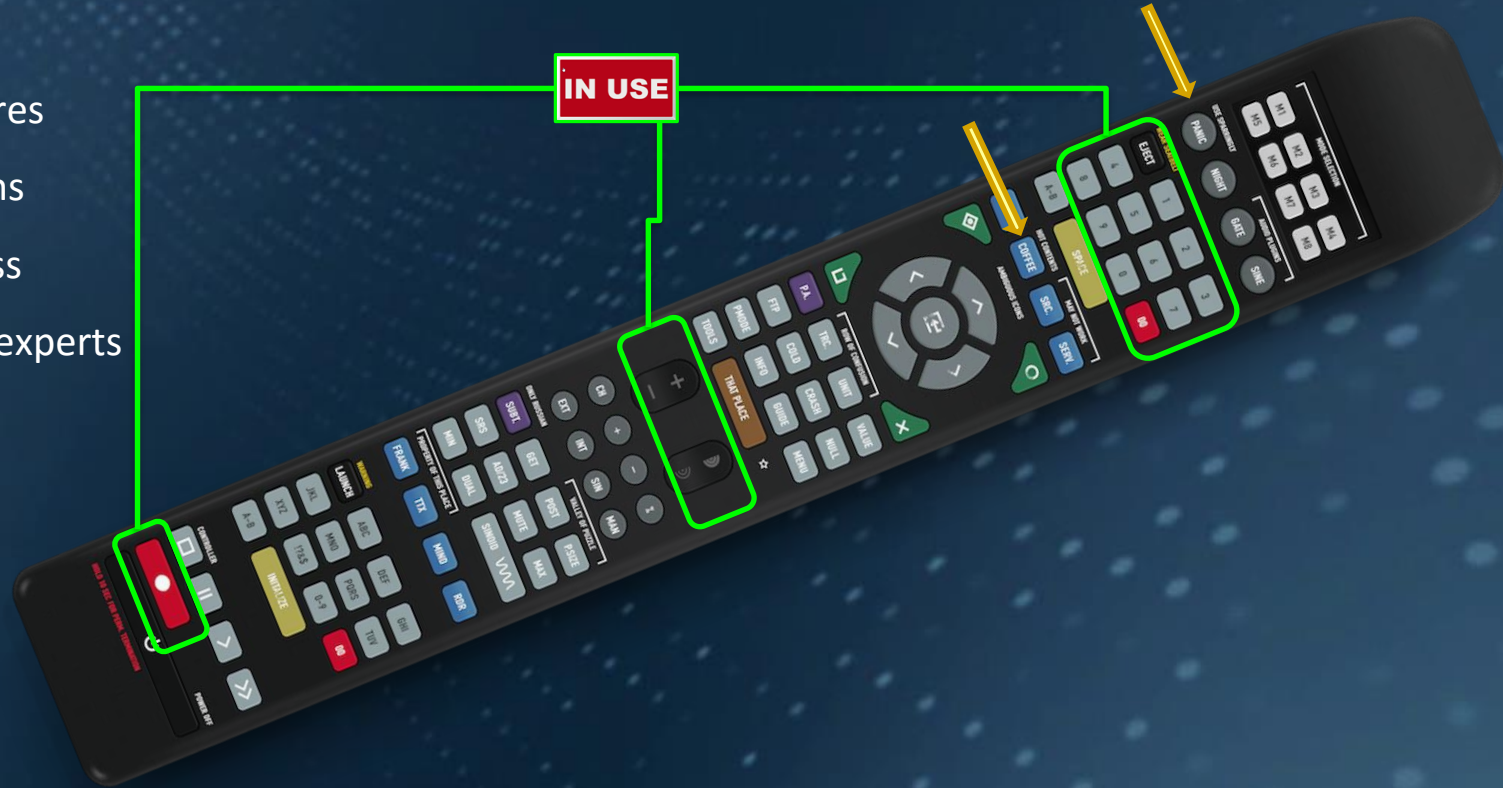
Iteration vs. innovation

- The evolution of the remote has been like many other things.
- Always operating on the parameters of the past
- Each new stage being more complex and less intuitive, because designers iterated rather than innovated.

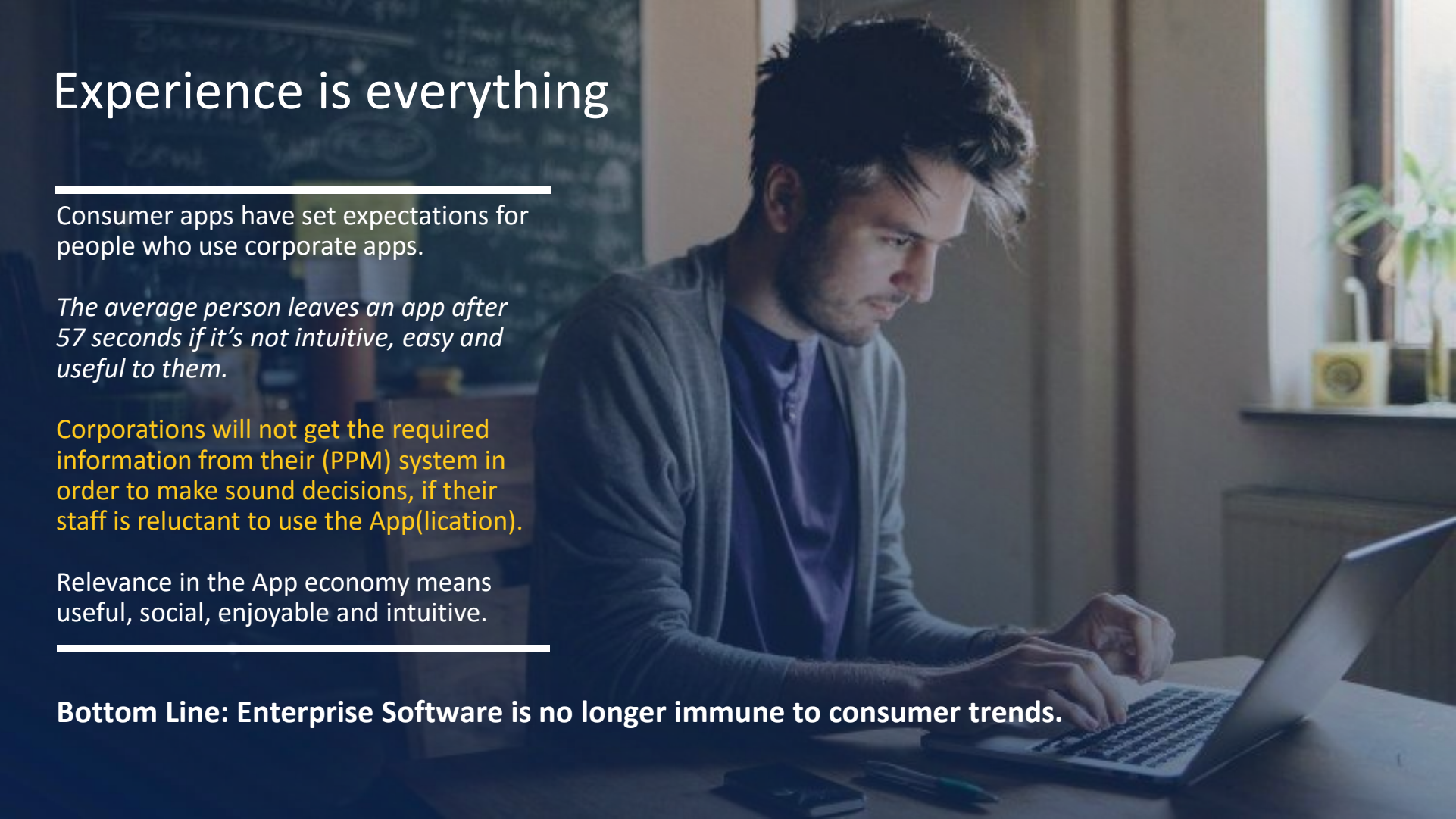


PPM...across the entire industry

- Tons of features
- Lots of buttons
- Lots of process
- Designed for experts



Experience is everything

A man with dark hair and a beard is sitting at a desk, focused on his laptop. He is wearing a grey cardigan over a dark blue shirt. The background is a dimly lit office space with a chalkboard covered in faint diagrams and a window with a potted plant on the sill.

Consumer apps have set expectations for people who use corporate apps.

The average person leaves an app after 57 seconds if it's not intuitive, easy and useful to them.

Corporations will not get the required information from their (PPM) system in order to make sound decisions, if their staff is reluctant to use the App(lication).

Relevance in the App economy means useful, social, enjoyable and intuitive.

Bottom Line: Enterprise Software is no longer immune to consumer trends.

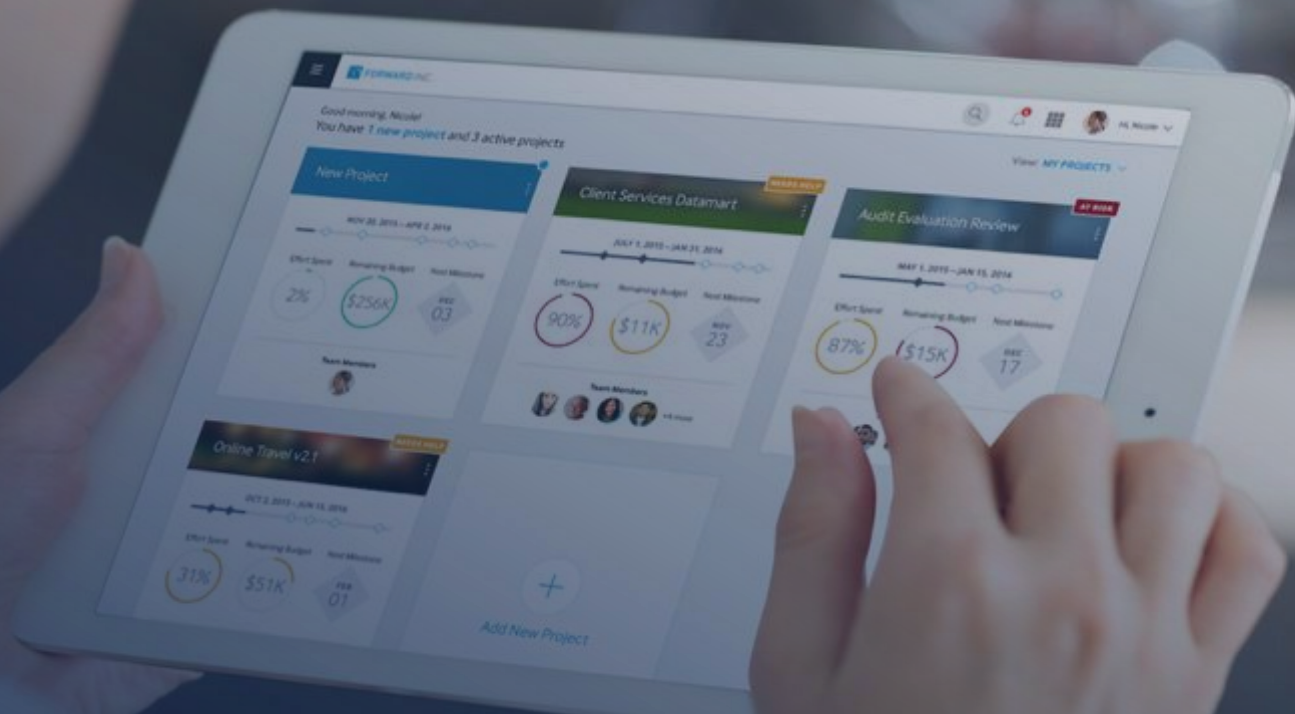


Reinventing the PPM Experience

We will deliver the power, and performance the enterprise needs...

With a user experience that that people will love...

And that journey has begun with CA PPM 15.1

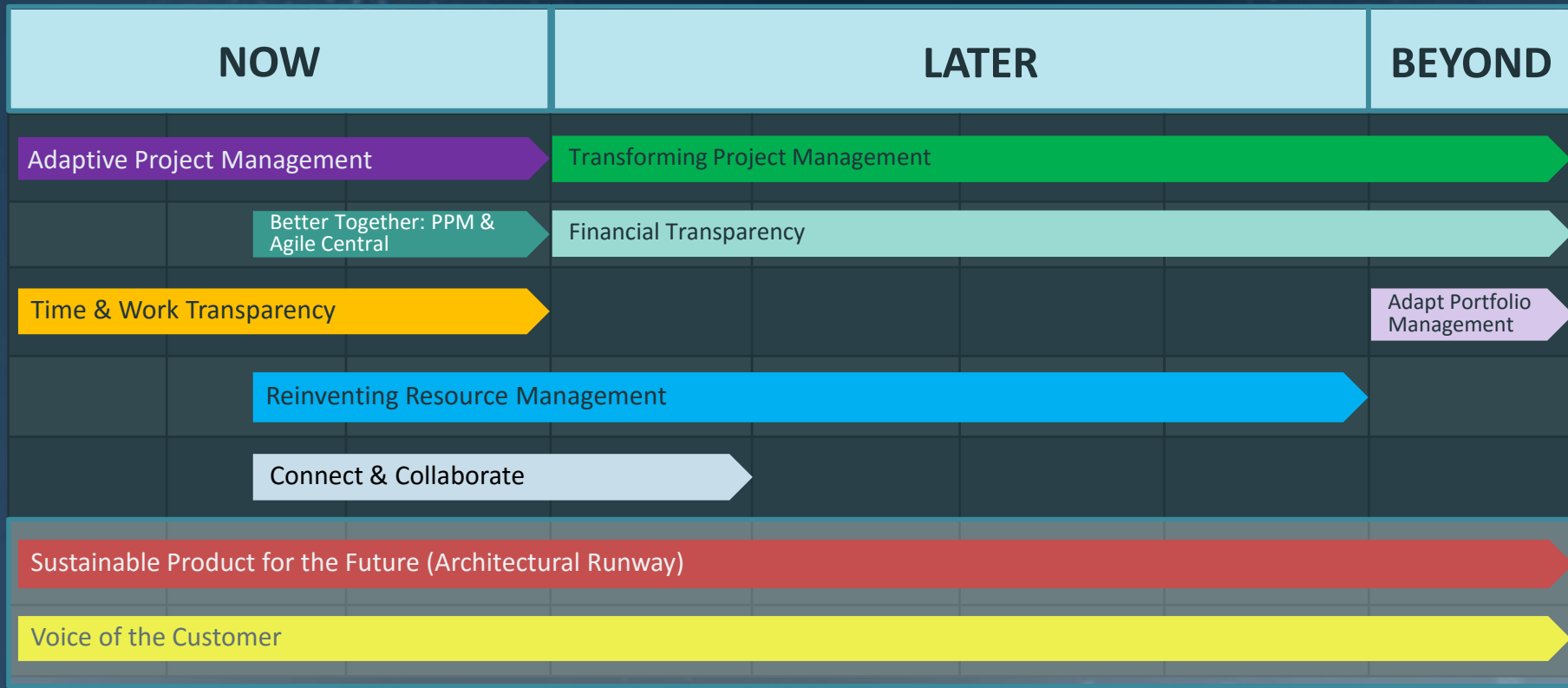


Introducing CA PPM 15.1

Adaptive Project Management

GA since August 2016

PPM initiative strategy



Roadmap: CA PPM

Timeline as of *January 3, 2017*

Delivered	Planned	Under Consideration
CA PPM 15.1	CA PPM	CA PPM
Adaptive Project Management UX	Adaptive Project Document Mgmt.	Project & Task Configurable Properties
Living Status Report	Project Collaboration – Phase 2	Financial Budgeting & Forecasting Ph. 1
Project to Project Connection to Classic PPM	PPM Time Sheet in Agile Central	Project Task Board
Project Collaboration Phase 1	Resource Manager – Staff Requests	Templates – Configurable Links
New Timesheet	Resource Mgt. – Telescoping Timescales	Connect Scheduling to the new UX
Time Approval Module	Resource Mgt. – Fulfilling Requests	Risks/Issues/Changes in new UX
	Resource Mgt. – Collaboration	Excel Import / Export Utility
Adaptive Project Management	Financial Transparency	Adaptive Portfolio Management
Time & Work Transparency	Reinvent Resource Management	Connect & Collaborate
	Better Together	Transforming Project Management



CA PPM

Adaptive
Project
Management

Time & Work
Transparency

Reinventing
Resource
Management

Better
Together

Customer
Voice

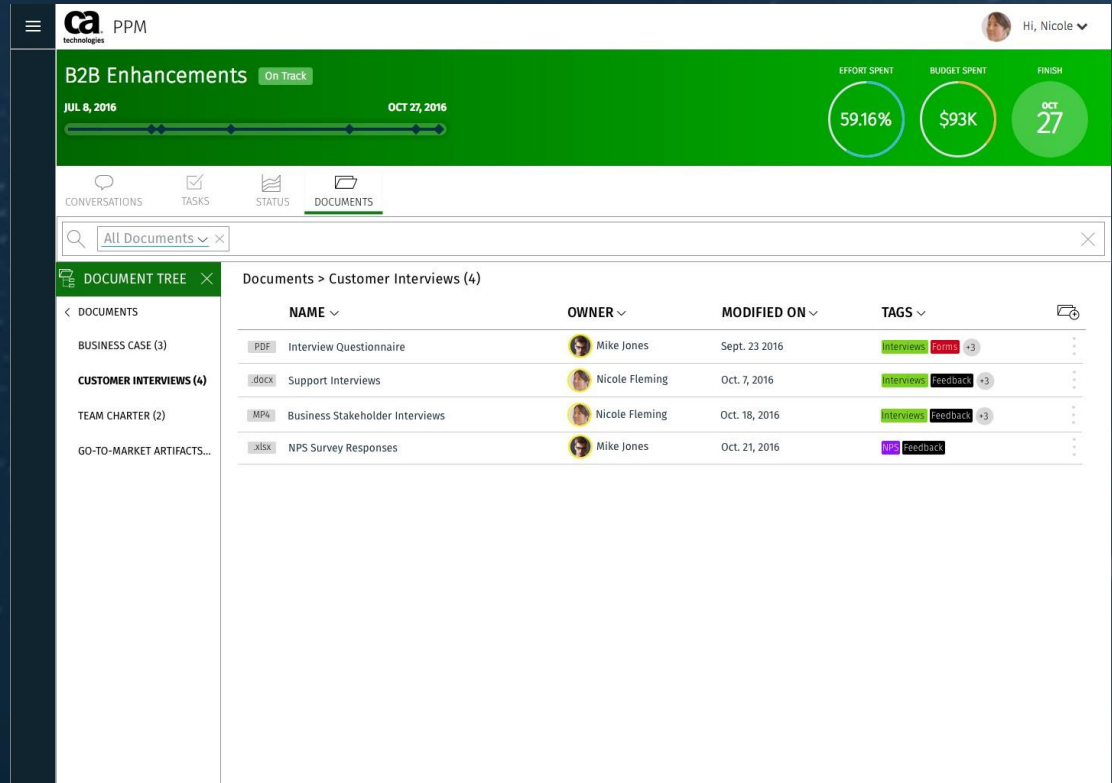
“Must Have” Adaptive Project Enhancements

Documents

- Document attachments

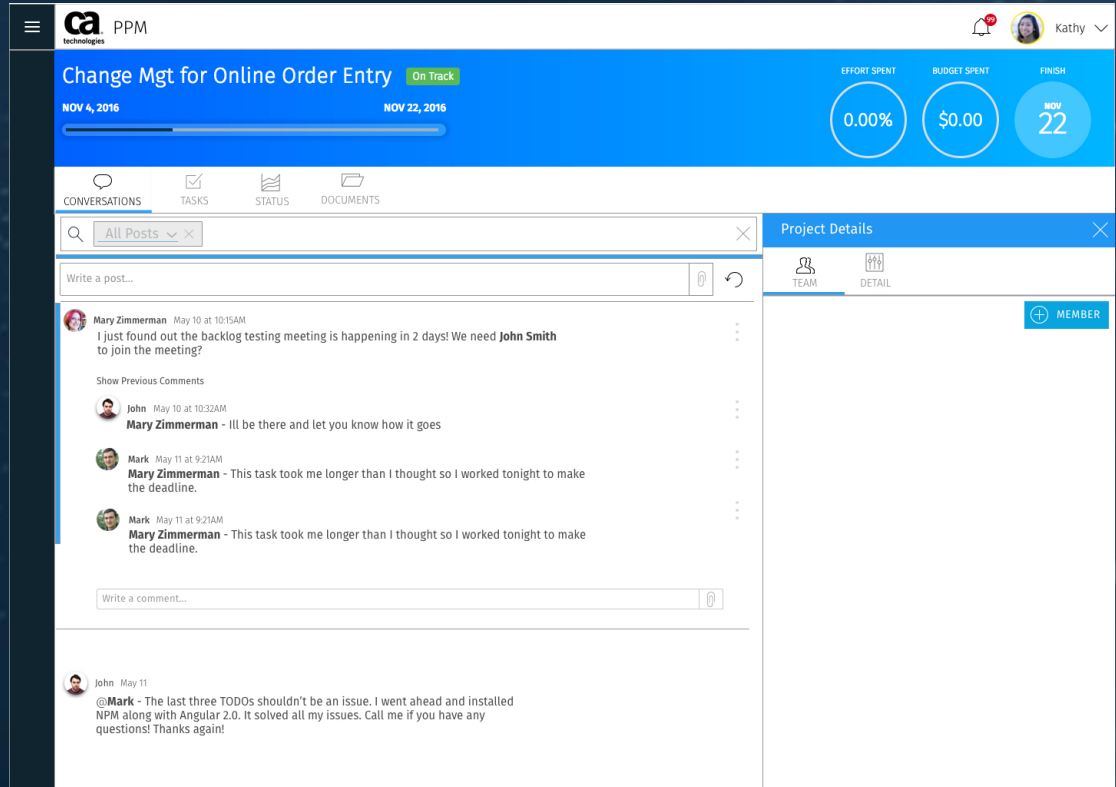
Adaptive project enhancements

- Additional filtering options for project tiles and tasks



Project Collaboration Enhancements

- Comment on a Post
- Configure your notification preference upon @mention
 - Alert notification
 - Email notifications
 - Configuring the lifespan of the Alert notifications.
- Alert notifications Bell
- Edit and delete posts or comments





CA PPM

Adaptive
Project
Management

Time & Work
Transparency

Reinventing
Resource
Management

Better
Together

Customer
Voice

Enter Time for Others

CA PPM

TIMESHEETS

REVIEW & APPROVE

Hi, Derrick

Tom T Architect

SELECT RESOURCE

< Oct 31 - Nov 6 OPEN

Nov 7 - Nov 13 OPEN

Nov 14 - Nov 20 OPEN >

HOURS 40.00 / 40.00

PROJECT TIME 60%

SUBMIT

< NOTES

⊕ WORK

⊖ WORK

	Mon. 7 8.00	Tue. 8 8.00	Wed. 9 8.00	Thu. 10 8.00	Fri. 11 8.00	Sat. 12	Sun. 13	Total 40.00	ETC
B2B Enhancements (PR1099)									
Infrastructure Requirements (Planning Phase)	8.00	8.00	8.00					24.00	0.00
Testing (Deployment and Quality Phase)									22.40
Unit and Performance Testing (Construction Phase)									24.00
Industry Trade Show (PR1098)									
Car rentals and services (Travel and Transportation)									0.00
Personnel (Exhibitor Package Forms)									5.33
Other Work									
Holiday									
Vacation Time				8.00	8.00			16.00	

Approve Time for Others

CA PPM

TIMESHEETS

REVIEW & APPROVE

Hi, Derrick

<

Oct 31 - Nov 6
OPEN

Nov 7 - Nov 13
OPEN

Nov 14 - Nov 20
OPEN

>





SHOWING

Resource Manager

Nicole Fleming

4/5 Members

SHOW ALL

TEAM MEMBER	1	OPEN	4	SUBMITTED	0	APPROVED	0	POSTED	0	RETURNED
<div><div>Brian Robinson Marketing</div><div>HRS <div></div> 40/40</div></div>				<div><div></div><div></div></div>						
<div><div>Hank Fisher Developer</div><div>HRS <div></div> 42/40</div></div>				<div><div></div><div></div></div>						
<div><div>Joyce Coleman Architect</div><div>HRS <div></div> 40/40</div></div>				<div><div></div><div></div></div>						
<div><div>Mike Johnson Architect</div><div>HRS <div></div> 40/40</div></div>				<div><div></div><div></div></div>						



CA PPM

Adaptive
Project
Management

Time & Work
Transparency

Reinventing
Resource
Management

Better
Together

Customer
Voice

Why reinvent resource management?

- Overwhelming customer demand for addressing Staffing Issues.
 - Simple: Excel like, drag and drop
 - Practical: Simple approvals, conversations
 - Powerful: Quickly find and fix the problems

Drag & Drop
to balance
work and
assign new
staffing
requests



- Focus on people with the “My Team” view
- Drill to each team members work
- Easily address staffing requests
- Approve “Soft Booked” (Grey)



RESOURCES



Jan 1, 2017



FTB



FORECAST

RESOURCES
INVESTMENTS

[illegible]

REQUESTS (2)



ROLE: Analyst ✕

[illegible]

- View entire time horizon to spot resource issues
- Focus on a time period to resolve

- View entire time horizon to spot resource issues
- Focus on a time period to resolve

Derrick

RESOURCES

Jan 1, 2017

FTE
 FORECAST

	2017 - 01	2017 - 02	2017 - 03	2017 - 04	2017 - 05	2017 - 06	2017 - 07	2017 - 08	2017 - 09	2017 - 10	2017 - 11	2017 - 12	2018 - Q1	2018 - Q2
Susan Lee														
Wayne Hill														
Amy Clark														
Cheryl Bulter														
Allen Craig														
Alex Garcia														

	2018 - Q3	2018 - Q4	2019	2020
Susan Lee				
Wayne Hill				
Amy Clark				
Cheryl Bulter				
Allen Craig				
Alex Garcia				

	2017 - 01	2017 - 02	2017 - 03	2017 - 04	2017 - 05	2017 - 06	2017 - 07	2017 - 08	2017 - 09	2017 - 10	2017 - 11	2017 - 12	2018 - Q1	2018 - Q2	TOTAL
Susan Lee	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	20.25
Wayne Hill	>	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	13.00
Amy Clark	>	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	13.00
Cheryl Bulter	>	1.00	1.00	1.50	1.50	1.50	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	14.50
Allen Craig	>	1.00	1.00	1.25	1.25	1.25	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	13.75
Alex Garcia	>	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	13.00

REQUESTS (2)

ROLE: Analyst

	JAN 1 - 31	Feb. 8-14	Feb. 15-21	Feb. 22-28	Feb. 29 - Mar. 6	Mar. 7-13	Mar. 14-20	Mar. 21-27	Mar. 28 - Apr. 3	Apr. 4-10	Apr. 11-17	Apr. 18-24	Apr. 25 - May 1	TOTAL
Business Analyst	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	1.75	21.75
Marketing Analyst	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	9.75
	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	13.00



- Select the time period to focus on, based on telescope colors

[illegible]

Telescoping

- Focus now on 6 periods

ca

PPM

technologies

Derrick

RESOURCES

Mar 1, 2017

FTE

FORECAST

RESOURCES

INVESTMENTS

2017 - 03

2017 - 04

2017 - 05

2017 - 06

2017 - 07

2018 - 08

TOTAL

16.25

16.25

16.25

15.00

15.00

15.00

93.75

PINNED (0)

ALL RESOURCES

Joyce Colleman

Justin Hayes

Nate Jordan

Valerie Childers

Ed Levert

Evan Verdoia

Kirk Rossman

Mark Goldman

Susan Lui

Wayne Hill

Amy Clark

Cheryl Bulter

Allen Craig

Alex Garcia

1.50

1.50

1.50

1.50

1.50

1.50

9.00

1.50

1.50

1.50

1.00

1.00

1.00

7.50

1.00

1.00

1.00

1.00

1.00

6.00

1.25

1.25

1.25

1.25

1.25

7.50

1.00

1.00

1.00

1.00

1.00

6.00

1.00

1.00

1.00

1.00

1.00

6.00

0.50

0.50

0.50

0.50

0.50

3.00

1.00

1.00

1.00

1.00

1.00

6.00

1.75

1.75

1.75

1.75

1.75

10.50

1.00

1.00

1.00

1.00

1.00

6.00

1.00

1.00

1.00

1.00

1.00

6.00

1.50

1.50

1.50

1.00

1.00

7.50

1.25

1.25

1.25

1.00

1.00

6.75

1.00

1.00

1.00

1.00

1.00

6.00

REQUESTS (2)

ROLE: Analyst

2017 - 03

2017 - 04

2017 - 05

2017 - 06

2017 - 07

2018 - 08

TOTAL

1.75

1.75

1.75

1.75

1.75

1.75

10.50

Business Analyst

0.75

0.75

0.75

0.75

0.75

4.50

Marketing Analyst

1.00

1.00

1.00

1.00

1.00

6.00

- Select specific team members to “Pin”
- Resolve one issue at a time

[illegible]

- View only “Pinned” team members
- Balance work, satisfy resource requests on the selected team members

[illegible]

Forecasting

- Toggle on forecast
- Model your plan to meet your budget

PPM

Derrick

RESOURCES

Mar 1, 2017

FTE

FORECAST

RESOURCES
INVESTMENTS

	2017 - 03		2017 - 04		2017 - 05		2017 - 06		2017 - 07		2018 - 08		TOTAL	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
PINNED (0) ALL RESOURCES >>	16.25	383,160	16.25	358,440	16.25	383,160	15.00	340,800	15.00	329,440	15.00	352,160	93.75	2,147,160
Joyce Colleman >	1.50	37,200	1.50	34,800	1.50	37,200	1.50	36,000	1.50	34,800	1.50	37,200	9.00	217,200
Justin Hayes >	1.50	37,200	1.50	34,800	1.50	37,200	1.00	24,000	1.00	23,200	1.00	24,800	7.50	217,200
Nate Jordan >	1.00	24,800	1.00	23,200	1.00	24,800	1.00	24,000	1.00	23,200	1.00	24,800	6.00	168,800
Valerie Childers >	1.25	31,000	1.25	29,000	1.25	31,000	1.25	30,000	1.25	29,000	1.25	31,000	7.50	181,000
Ed Levert >	1.00	24,800	1.00	23,200	1.00	24,800	1.00	24,000	1.00	23,200	1.00	24,800	6.00	168,800
Evan Verdoia >	1.00	19,840	1.00	18,560	1.00	19,840	1.00	19,200	1.00	18,560	1.00	19,840	6.00	114,560
Kirk Rossman >	0.50	12,400	0.50	16,600	0.50	12,400	0.50	12,000	0.50	11,600	0.50	12,400	3.00	82,400
Mark Goldman >	1.00	19,840	1.00	18,560	1.00	19,840	1.00	19,200	1.00	18,560	1.00	19,840	6.00	114,560
Susan Lui >	1.75	43,400	1.75	40,600	1.75	43,400	1.75	42,000	1.75	40,600	1.75	43,400	10.50	253,400
Wayne Hill >	1.00	19,840	1.00	18,560	1.00	19,840	1.00	19,200	1.00	18,560	1.00	19,840	6.00	114,560
Amy Clark >	1.00	19,840	1.00	18,560	1.00	19,840	1.00	19,200	1.00	18,560	1.00	19,840	6.00	114,560
Cheryl Bulter >	1.50	37,200	1.50	34,800	1.50	37,200	1.00	24,000	1.00	23,200	1.00	24,800	7.50	168,800
Allen Craig >	1.25	31,000	1.25	29,000	1.25	31,000	1.00	24,000	1.00	23,300	1.00	24,800	6.75	168,800
Alex Garcia >	1.00	24,800	1.00	23,200	1.00	24,800	1.00	24,000	1.00	23,200	1.00	24,800	6.00	168,800

REQUESTS (2)

ROLE: Analyst

	2017 - 03		2017 - 04		2017 - 05		2017 - 06		2017 - 07		2018 - 08		TOTAL	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
Business Analyst	0.75	18,600	0.75	17,400	0.75	18,600	0.75	18,000	0.75	17,400	0.75	18,600	4.50	108,600
Marketing Analyst	1.00	24,800	1.00	23,200	1.00	24,800	1.00	24,000	1.00	23,200	1.00	24,800	6.00	144,800



CA PPM

Adaptive
Project
Management

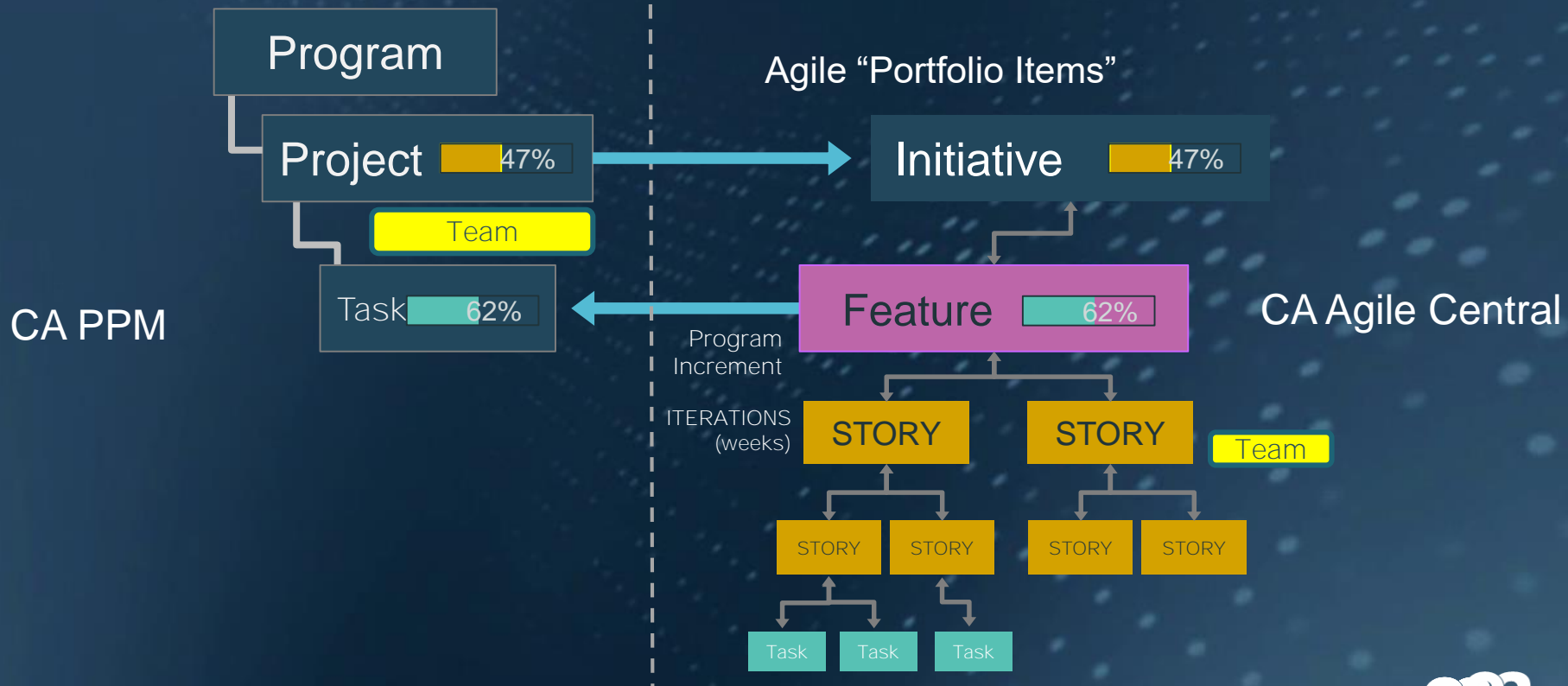
Time & Work
Transparency

Reinventing
Resource
Management

Better
Together

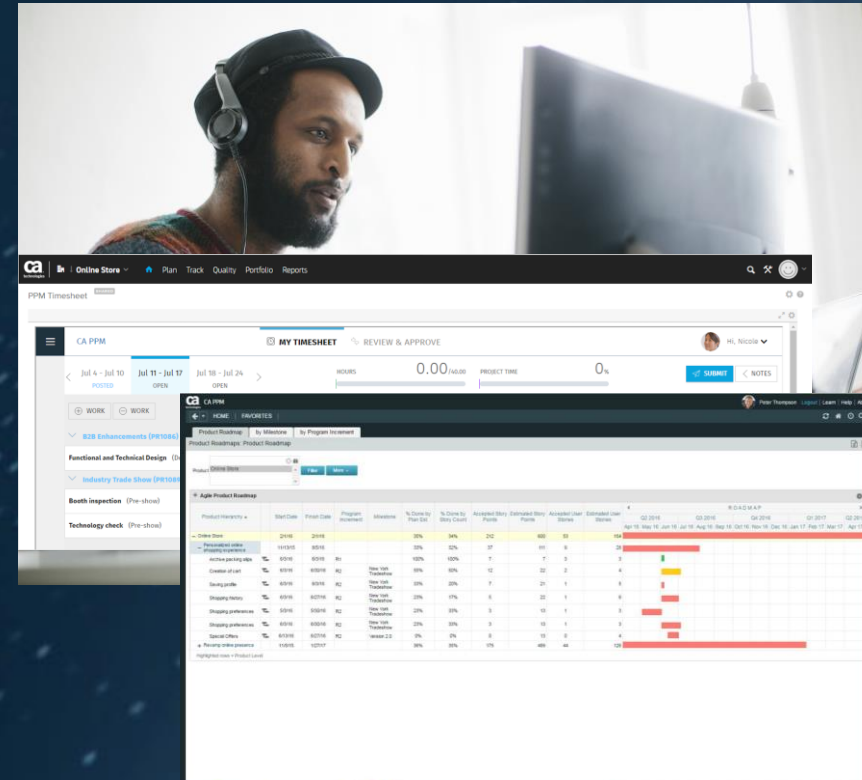
Customer
Voice

Current - Connecting Strategy to Agile Execution



“Better Together” – increasing the strength

- Cost:** Integrated cost management by embedding PPM Time inside of Agile Central.
- Scope:** Optionally pushing approved features to Agile Central
- Insights:** Reporting on business deliverables by initiative, release & milestone



Timekeeping task template

Task	Agile State	%Done By Plan Est	Accepted Points	Accepted Stories
— R1 Release				
— Feature: Shopping Cart	Done	100.00%	18	7
Design Time - OpEx				
Development Time - CapEx				
Feature: Knowledgebase	Done	100.00%	23	6
Feature: Homepage	Done	100.00%	12	3

Simplify Time Tracking by automatically appending timekeeping tasks to features as they are imported from Agile Central

Agile Central Initiative

Feature: Shopping Cart

Feature: Knowledgebase

Feature: Homepage

This saves “work about work:

1. Engineers summarize time to the feature, not all the stories.
2. Eliminates requiring the coding of each Story as either CapEx or OpEx



CA PPM

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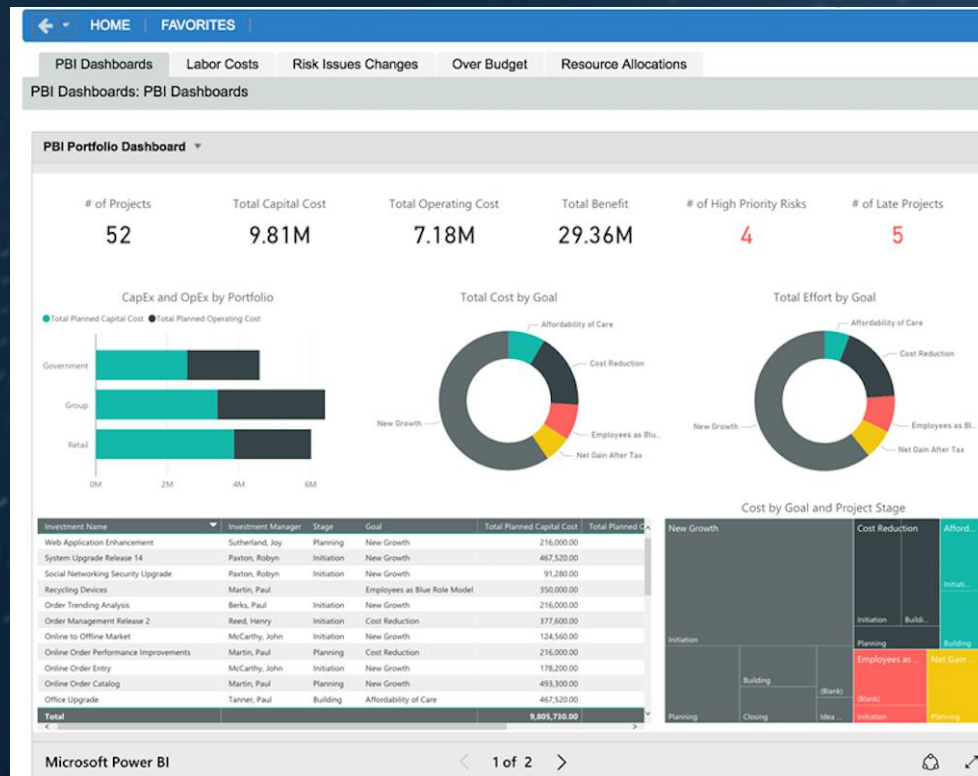
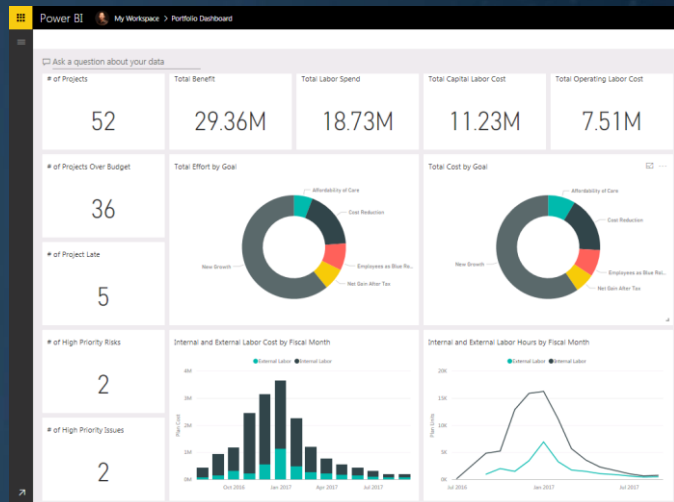
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Extending the Power of the Data Warehouse – oData Connector

- Connector to enable SaaS data warehouse connection to third party BI solutions (Power BI, Tableau)





CA PPM

Beyond the Beyond

Goal: Get the power back in projects

- Turn on the other project modules
 - Budgets and Forecasts
 - Risk Issue Change
 - Scheduling
- Re-introduce custom attribute configurability – Projects & Tasks
- Configurable Gauges
- Deliver sophistication without complexity



Risk/Issues/Change Requests

- Convert RIC forms to new UX
- Keep It Simple
 - Low configurability

Properties Notes Associated Action Items Associated Tasks Processes

Project: Online Order Catalog | Issue: Sponsorship Risk - Main

General

Issue Name:

Issue ID:

Description:

Category:

Priority:

Resolution:

Status:

Owner:

Document:

Impact Date:

Target Resolution Date:

Last Updated Date:

Last Updated By:

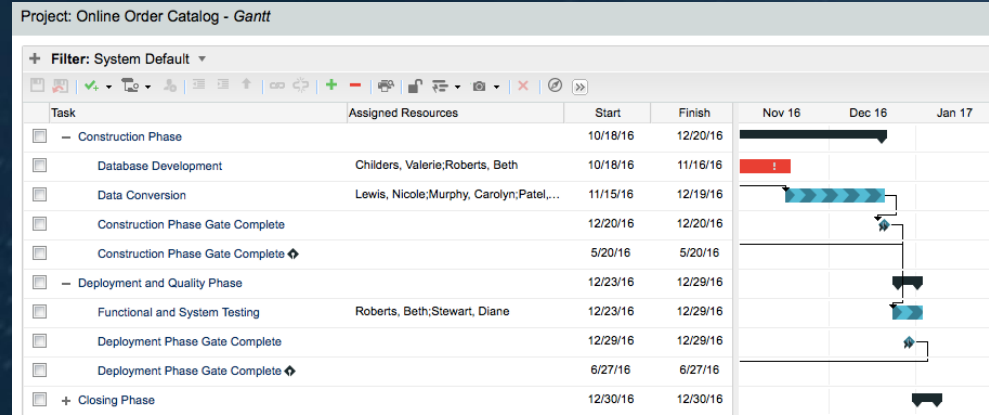
Created Date:

Created By:

Project Scheduling

- Leverage existing scheduling for another release

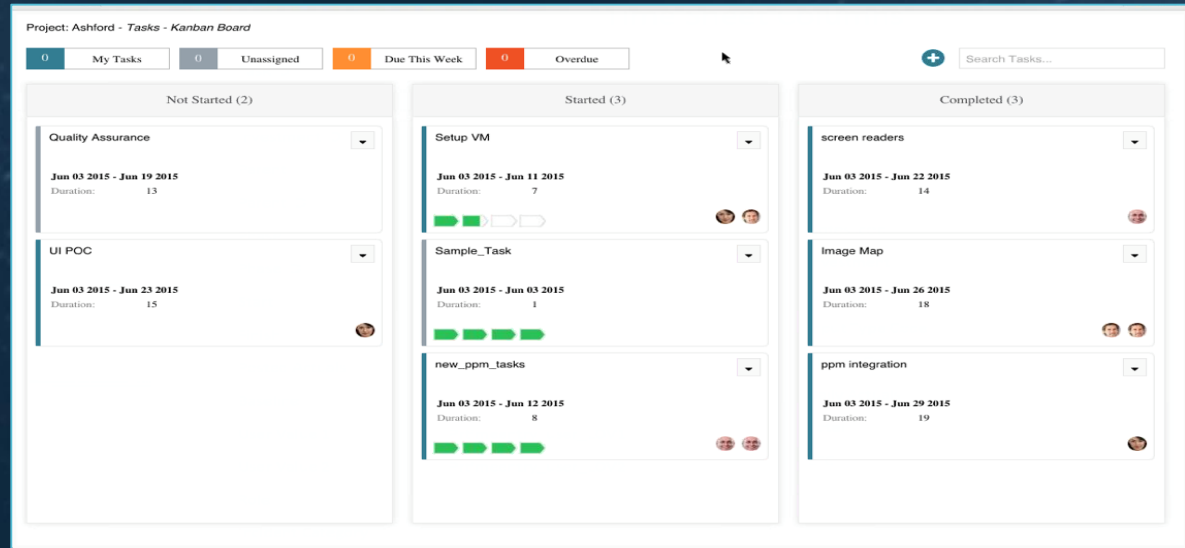
- MSP
- OWB
- Gantt



- Call from within the new UX project

Task Kanban

- Provide casual PMs a way to organize their work in a Kanban.



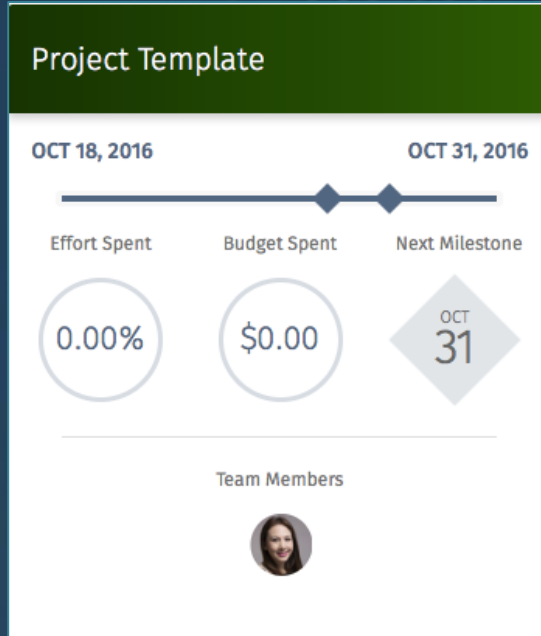
- Configurable columns (change the labels to whatever you like)
 - Backlog / Due this week / Due Next week / Unassigned / Completed

The Trap: How do we add power and keep it simple?

The screenshot displays the CA PPM (Project Portfolio Management) software interface. On the left, a 'Project Template' sidebar is visible, showing a timeline from OCT 18, 2016 to OCT 31, 2016. It includes progress indicators for 'Effort Spent' (0.00%) and 'Budget Spent' (\$0.00), and a 'Next Milestone' for OCT 31. Below these are 'Team Members' and a profile picture. The main area shows a 'Project Summary' with various tabs like Dashboard, Properties, Team, Tasks, Financial Plans, Chargebacks, Hierarchy, Risks/Issues/Changes, Collaboration, and Processes. A status bar at the bottom indicates 'Start Date' as 10/18/2016 and 'Finish Date' as 12/30/2016. A semi-transparent text box is overlaid on the right side of the interface.

- One size fits all forces large learning curves.
- No configurability blocks use
- Need to be smart / eye on upgrading and ease of use

Project Lifecycles – Kill the Remote



Not everyone is interested in all the power.

- Many people use a small subset of functions
- The full functionality is a barrier to use, and a training dilemma

Create Project Templates that determine what the users will see:

- Custom and Standard Fields
- Custom Links
- Project Modules



Each Project that is created from the template is as simple or complex as needed.
Power when you need it, simple when you don't.

Simple or Powerful... in one solution

Simple Marketing Template

OCT 18, 2016

OCT 31, 2016

Effort Spent

Budget Spent

Next Milestone

0.00%

\$0.00

OCT
31

Marketing Custom Fields

Project Manager
Theresa Robertson

Start Date
Aug 31 2016

Finish Date
Apr 12 2017

Financial Summary

Capital Budget	\$0.00
Operating Budget	\$0.00
Total Budget	\$0.00
Total Actual Cost	\$10,840.00
Budget Remaining	-\$10,840.00

Open for Time Entry
true

Active
true

Large Project Custom Fields

Project Manager
Theresa Robertson

Start Date
Aug 31 2016

Finish Date
Apr 12 2017

Financial Summary

Capital Budget	\$0.00
Operating Budget	\$0.00
Total Budget	\$0.00
Total Actual Cost	\$10,840.00
Budget Remaining	-\$10,840.00

Open for Time Entry
true

Active
true

Complex Project Template

OCT 18, 2016

OCT 31, 2016

Effort Spent

Budget Spent

Next Milestone

0.00%

\$0.00

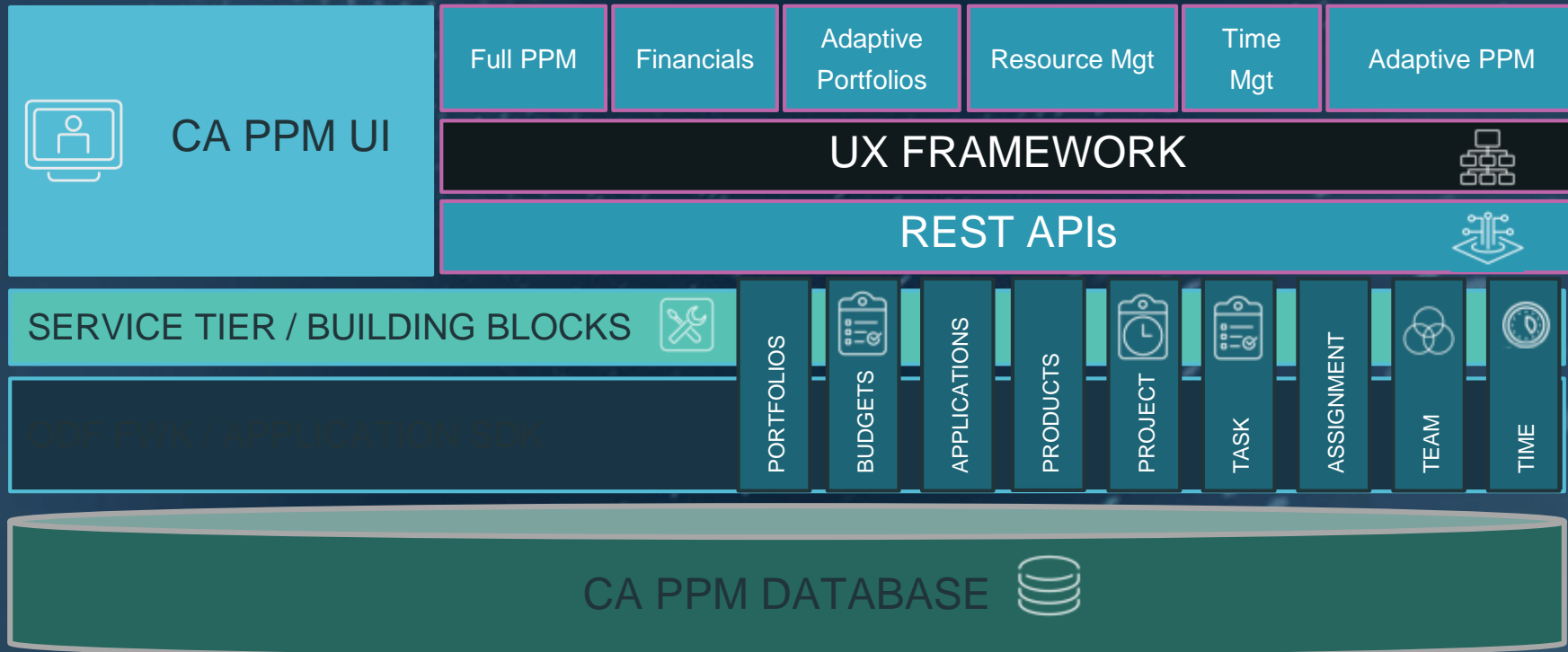
OCT
31


In-Progress 5 of 8	Completed 10 of 8	Accepted 48 of 8
<p>DE29978 Ankit Vijay</p> <p>CRT: PPM-GROUP3: SQL/ORACLE BookResAvailWebOtherResQAUTest is failing</p>	<p>DE29815 Prashant</p> <p>CRT:Platform MSSQL/ORCL Grp 3 VerifyFilterInCustomGridPortletQAUTest is failing</p>	<p>DE29763 Ankit Vijay</p> <p>CRT:PPM-GROUP1: ORACLE: CheckAggregatedValsubProjForProg QAUTest.CheckAggregatedValsubProjForProg is failing</p>
<p>S125639 Karthik Venkata Rama</p> <p>Automate P2 tests for Grid Portlets</p>	<p>DE29814 Karthik Venkata Rama</p> <p>CRT:Platform MSSQL/ORCL Group 3 FilterPortletsGridPortletPowerFilterInCustomObjectQAUTest is failing</p>	<p>S124012 Prashant</p> <p>Automate resource management TC48430</p>
<p>S122123 Kamesh N</p> <p>CRTs execution in SI environment</p> <p>50%</p>	<p>DE29813 Karthik Venkata Rama</p> <p>CRT: Platform Grp3 MSSQL/ORCL - FilterPortletsGridPortletPowerFilterInCustomObjectQAUTest is failing</p>	<p>S124002 Ankit Vijay</p> <p>Automate Resource Management TC51411</p>

- Budget & Forecast
- Time Tracking
- Issues Risk and Change
- Workflow
- Master/Subs

Task	Assigned R	Aug 16	Sep 16	Oct 16
+ Initiation Phase				
- Planning Phase				
Define Scope Change and Control Process	Martin, Pa			
Travel Expense	Travel			
Define Resource Plan	Martin, Pa			
Risk Response and Mitigation Plan	Goldman,			
Identify Storage Requirements	Newburg,			
Identify Infrastructure Requirements	Newburg,			
Complete Project Plan	Goldman,			

One Solution – Unified Architecture



A wide-angle photograph of a large audience seated in a conference hall. The audience is diverse in age and appearance, many looking towards the stage. The stage area is dark, with two large white projection screens visible. The text "Thank you for your attention" is overlaid on the central screen. The foreground shows the backs of several audience members, some looking at their phones or papers.

Thank you for your attention

Questions