



**Welcome to**

**clarity**<sup>TM</sup>

**User Group**



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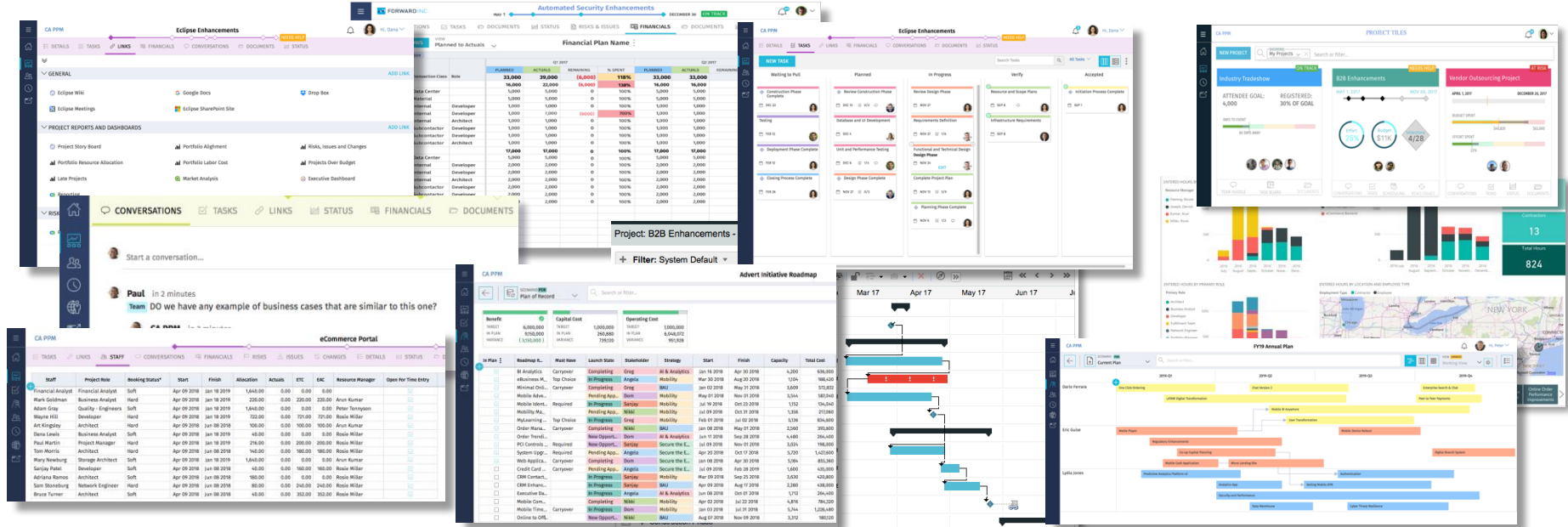
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# Introducing 15.5: configurable, powerful & social

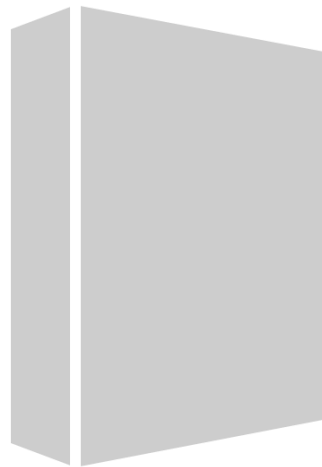
Unique ability to enable “business light” and “PM power” in one solution.



- ✓ Project Management
- ✓ Task Board
- ✓ Blueprinting
- ✓ Teams
- ✓ Document Management
- ✓ Living Status Report
- ✓ Collaboration
- ✓ Custom Investments
- ✓ Staffing
- ✓ Financial Plans
- ✓ Project Links
- ✓ Project Channels
- ✓ Time Entry & Approval
- ✓ Enter & Approve Time for Others
- ✓ Roadmapping
- ✓ Time-Phased Roadmap Planning

clarity™

15.5.1





# Common Custom Sub-Object Grid

# Common Custom Sub-Object Grid for Projects

The image displays a software interface for a project management system, specifically in 'EDIT MODE' for a 'Standard Project' (Copy of). The interface is divided into several sections:

- Header:** Includes a navigation menu on the left, a title bar with 'CA PPM' and '(Copy of) Standard Project - EDIT MODE', and a user profile 'CA HI, CA PPM'.
- Navigation:** A top bar with 'DETAILS', 'VISUALS', and 'MODULES' tabs. The 'MODULES' tab is active.
- Module Selection:** A central area with a grid of module icons: CONVERSATIONS, TASKS, LINKS, STATUS, FINANCIALS, RISKS, ISSUES, CHANGES, DOCUMENTS, and DETAILS. A 'COMPLIANCE' module is highlighted with a red 'X' icon, indicating it is selected or being added.
- Instructions:** A text box states: 'Drag to select and reorder modules. The first 4 modules appear on Project Tiles.'
- Project Details:** A section titled 'On-Premise to SaaS Migration' shows a table with columns for 'Name' and 'ID'. The table is currently empty.
- Footer:** A bottom bar with a search bar and a 'VIEW' button.

# Status Report Grid

*Name	*ID ↑	Report Date	Report Status	Schedule Status	Scope Status	Cost And Effort Status	Overall Status
Status Report_2018-11-09	SR0005	Nov 09 2018	Draft	Needs Help	On Track	Needs Help	50
Status Report_2018-11-02	SR0004	Nov 09 2018	Final	At Risk	At Risk	At Risk	90
Status Report_2018-10-26	SR0003	Nov 09 2018	Final	Needs Help	Needs Help	Needs Help	60
Status Report_2018-10-19	SR0002	Nov 09 2018	Final	On Track	On Track	On Track	30

- Allows users to edit Status Report fields via Grid
- Update Stock and Custom attributes on the Status Report object
- Update current and prior Status Report instances
- **Best Practice**
  - **We do not recommend having both the “STATUS REPORT” (Grid) and “STATUS” (PDF Status Report) Module tab exposed at the same time**



# To Do Scoreboard

Sailesh Korla



To Do Scoreboard



TASKS

TO DOS

DUE DATES

Jan 01 2018

TO

Dec 31 2019



Filter...

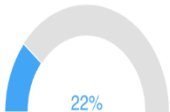
PROJECT

TASK OWNER

TO DO OWNER

2

Completed



22%

7

To Go

418

Days Remaining

TARGET PACE

0.02

Complete per day

PACE SO FAR

0.01

Completed per day

BREAKDOWN

To Do Owner



TO DO OWNER

COMPLETED

TARGET PACE

PACE SO FAR

TOTAL



2/9 22%

0.02

0.01

Jaleel Abdul



0/1 0%

0

0

Srinivas Addanki



0/1 0%

0

0

PPM Administrator



0/1 0%

0

0

Rita Cohen



1/1 100%

0

0

Ken Dinsmore



0/1 0%

0

0

Nick Evans



1/3 33%

0

0

Unassigned



0/1 0%

0

0

# To Do's - Breakdown

## BREAKDOWN

Search...

To Do Owner

Project

Task Owner

## STATUS

Search...

All

Open

Completed

## BREAKDOWN

To Do Owner

TO DO OWNER	COMPLETED	TARGET PACE	PACE SO FAR
<b>TOTAL</b>	7/13 53%	0.2	0.11
Alex Garcia	2/3 66%	0.03	0.03
Mike Jones	1/3 33%	0.07	0.02
Adriana Ramos	2/2 100%	0	0.03
Alain Serpoix	1/3 33%	0.07	0.02
Alex Shvets	0/1 0%	0.03	0
Aaron Waldman	1/1 100%	0	0.02

## STATUS

All

- ☒ Review methods to implement DR  
 DR and Business continuity plan  
 Annual DR Review and Tests  
 Sep 26 2018
- ☐ Validate the plan with executive team  
 DR and Business continuity plan  
 Annual DR Review and Tests  
 Nov 22 2018
- ☐ Implement recovery plan at customer sight  
 DR and Business continuity plan  
 Annual DR Review and Tests  
 Dec 09 2018



# **Investment Type Blueprints and DETAILS Module**

# Blueprint Administration Changes



CA PPM



Hi, CA PPM ▾

Search or filter...

TYPE

BLUEPRINT

TEMPLATE

TEMPLATE ACTIVE STATUS

»	BLUEPRINT	TYPE	LAST USED	USING	MODIFIED BY	MODIFIED	PUBLISHED	
	Business Case	Business Case <span>DEFAULT</span> <span>STANDARD</span>		0	CA PPM Admini...	Nov 9, 2018	Nov 9, 2018	⋮
>	IT Project Blueprint	Project <span>DEFAULT</span>	Nov 9, 2018	45	CA PPM Admini...	Nov 9, 2018	Nov 9, 2018	⋮
	Sales Business Case	Business Case	Nov 9, 2018	4	CA PPM Admini...	Nov 9, 2018	Nov 9, 2018	⋮
>	Standard Project	Project <span>STANDARD</span>		0	CA PPM Admini...	Nov 9, 2018	Aug 23, 2017	⋮



Rename

- ☰
- 🏠
- 📈
- 📊
- ☑️
- 📍
- 👤
- 🌐
- 📁

Sales Business Case - EDIT MODE



CA

Hi, CA PPM 

## DETAILS

EXIT

DISCARD EDITS

PUBLISH

## FIELDS

Q Search...

ADD SECTION

ACTIVE

ARCHITECTURAL FIT

BLUEPRINT

## BUSINESS ALIGNMENT

BUSINESS UNIT PRIORITY

## CALCULATE FINANCIAL METRICS

CHARGE CODE

COMMERCIAL VALUE

CORPORATE PRIORITY

CREATED DATE



## SUMMARY

NAME \*

INVESTMENT ID \*

MANAGER

STAGE

START \*

FINISH \*

## PROGRESS

## WORK STATUS

### DESCRIPTION



## FINANCIALS

PLANNED COST S...

PLANNED COST FI...

## PLANNED CAPITAL...

PLANNED OPERATI...

PLANNED COST

# Custom Investment Type – Grid and DETAILS Tab

CA PPM Business Case CA Hi, CA PPM VIEW FY2019

← ADD FILTER PLANNED OPERATING % 0 TO 70 ID BC REMOVE ALL

Name	ID ↑	Planned Cost Start	Planned Cost Finish	Planned Capital Cost	Planned Operating %	Planned Operating Cost	Planned Capital %	Planned Benefit
<a href="#">Online Bill Pay</a>	BC1001	Nov 09 2018	Mar 31 2019	250,000.00	66.67%	500,000.00	33.33%	Nov 09 2018
<a href="#">Partner Sales Portal</a>	BC1002	Nov 09 2018	Nov 09 2018	1,200,000.00	17.24%	250,000.00	82.76%	Nov 09 2018
<a href="#">Learning Management Upgrade</a>	BC1003	Nov 09 2018	Nov 09 2018	250,000.00	3.85%	10,000.00	96.15%	Nov 09 2018
<a href="#">Lead Generation Analytics</a>	BC1004	Nov 09 2018	Nov 09 2018	500,000.00	14.53%	85,000.00	85.47%	Nov 09 2018

CA PPM ← BUSINESS CASE

## Online Bill Pay

CA Hi, CA PPM

DETAILS

SUMMARY

NAME *	INVESTMENT ID *
Online Bill Pay	BC1001
MANAGER	STAGE
Childers, Valerie	Testing and Validation
START *	FINISH *
Nov 09 2018	Mar 31 2019
PROGRESS	WORK STATUS
Started	Requested
DESCRIPTION	BLUEPRINT
	Sales Business Case
	Business Case
	Sales Business Case

# Import Custom Investments

The screenshot displays the CA PPM interface for the 'RamaCustomInvestment' project. The main grid shows a list of items with columns for 'In Plan', 'Linked To', 'Linked To Type', 'Linked To ID', 'Sync', and 'Last Sync...'. A context menu is open over the grid, showing options: 'Import from PPM' (custaqustn), 'Import from CSV' (custgreenintive), and 'Sync Linked Items' (sandcustobj, custidea, Project). Below the grid, an 'IMPORT CUSTGREENINTIVE' dialog is open, showing a search bar and a list of items: 'Greeninitiative1 (200)' and 'Greeninitiative2 (201)'. An 'IMPORT' button is visible in the dialog.

In Plan	Linked To	Linked To Type	Linked To ID	Sync	Last Sync...
<input type="checkbox"/>	Idea1	custidea	300	<input checked="" type="checkbox"/>	Nov 16 2018
<input type="checkbox"/>	Idea2	custidea	301	<input checked="" type="checkbox"/>	Nov 16 2018
<input type="checkbox"/>	Idea3	custidea	302	<input checked="" type="checkbox"/>	Nov 16 2018

IMPORT CUSTGREENINTIVE

CUSTGREENINTIVE

Search...

- ☐ Greeninitiative1 (200)
- ☐ Greeninitiative2 (201)

IMPORT

# Link and Sync Custom Investments

CA PPM

RamaCustomInvestment

CA

Hi, CA PP

←

Search or filter...

VIEW UNSAVED

Search...

In Plan :	Sync Linked Items	Start	Finish	Linked To	Linked To Type	Linked To ID	Sync	Last Synced Date
<input type="checkbox"/>	Idea1	Nov 16 2018	Nov 16 2018	Search...	custidea	300	<input checked="" type="checkbox"/>	Nov 16 2018
<input type="checkbox"/>	Idea2	Nov 16 2018	Nov 16 2018	REMOVE LINK		301	<input checked="" type="checkbox"/>	Nov 16 2018
<input type="checkbox"/>	Idea3	Nov 16 2018	Nov 16 2018	CUSTAQUESTN		302	<input checked="" type="checkbox"/>	Nov 16 2018

aquisition1 (100)

aquisition2 (101)

aquisition2 (102)

aquisition3 (103)

CUSTGREENINTIVE

Greeninitiative1 (200)

Greeninitiative2 (201)

Greeninitiative3 (202)

PROJECT





# Delete Investments

Delete Investments

Deactivate  
Investment

Delete  
Time  
Reporting  
Periods

Close  
Time  
Period

Review  
Job Log

Mark for  
Deletion

Review  
Items

Execute  
Job

Review Job  
Log

Execute  
Job

Review  
Items

Mark for  
Deletion

Purge  
Financial  
Tables

Close  
Financial  
Status

Review  
Job Log

Review  
Items

Execute  
Job



# Project TASKS Grid – Generic Layout and Terminology

The screenshot shows the 'BYOD Management' project grid. The interface includes a top navigation bar with tabs like CONVERSATIONS, TASKS, LINKS, STATUS, FINANCIALS, RISKS, ISSUES, CHANGES, DOCUMENTS, DETAILS, and STAFF. The main grid displays task details with columns for WBS, Name, Start, Finish, Status, Task Owner, Cost, Milestone, Actuals, ETC, and Total Effort. A right-click context menu is open over the 'Requirements Definition' task, showing options like 'Insert Row Below' and 'Delete Row'. A column panel on the right allows for expanding/collapsing columns and supporting API-enabled fields.

**ADD Tasks**

**Column layout**  
Persistent across all projects

**Color Mappings**  
Lookups & number fields

**Multi-Sort**  
Select up to 4 columns

**FTE or Hours\***  
Display option from GENERAL settings

**Pagination Controls**  
Shows total record count  
Displays 500 rows per page

**Right-Click Action**  
DELETE Tasks\*  
Click anywhere on row

**Copy/Paste**  
Multi-select

**Column Panel**  
Expand/Collapse  
Supported API-enabled fields

**Personalization:** Last configuration saved per project for logged in user.  
Filter, Board Column Hide/Show configuration, Grid Column Order, Hide/Show configuration



# Roadmap Items - Import Custom Investments


# Include In Roadmaps - Option

New capability to include 'Custom Investment Objects' in Roadmaps.

This option controls the display of Custom Objects in Roadmaps and allows the user to select custom investments to import them as Roadmap items.

Properties   Attributes   Audit Trail   Access to this Object ▾

Object: custom-investment - *Properties*

Object Name  



Object ID custominvestment

API Attribute ID custCustominvestments


Content Source  ▾

Description

→ Master or Subobject ☒ Master

Partition Model   

☐ Subobject

 → Master Object

Event Enabled ☐

Copy Enabled ☐

Export Enabled ☐

View All Enabled ☐

**Include In Roadmaps ☒**

Object Extension Investment Extension

# Import Custom Investments

## Import from PPM

Available across all views

## Import Custom Investments widget

Filter using custom investment for multi select of custom Investment

The screenshot shows the CA PPM interface. The top navigation bar includes 'CA PPM', 'RamaCustomInvestment', and user information 'Hi, CA PPM'. A search bar is present with the text 'Search or filter...'. The main content area displays a table with columns: 'In Plan', 'Idea', 'Linked To', 'Linked To Type', 'Linked To ID', 'Sync', and 'Last Sync...'. The table contains three rows of data. A context menu is open over the table, showing options: 'Import from PPM' (selected), 'Import from CSV', and 'Sync Linked Items'. The 'Import from PPM' option is highlighted. Below the table, a modal window titled 'IMPORT CUSTGREENINTIVE' is displayed. It features a search bar with the text 'CUSTGREENINTIVE' and a list of items: 'Greeninitiative1 (200)' and 'Greeninitiative2 (201)'. An 'IMPORT' button is visible in the bottom right corner of the modal.

In Plan	Idea	Linked To	Linked To Type	Linked To ID	Sync	Last Sync...
<input type="checkbox"/>	Idea1	custaqustn	custidea	300	<input checked="" type="checkbox"/>	Nov 16 2018
<input type="checkbox"/>	Idea2	custgreenintive	custidea	301	<input checked="" type="checkbox"/>	Nov 16 2018
<input type="checkbox"/>	Idea3	sandcustobj	custidea	302	<input checked="" type="checkbox"/>	Nov 16 2018

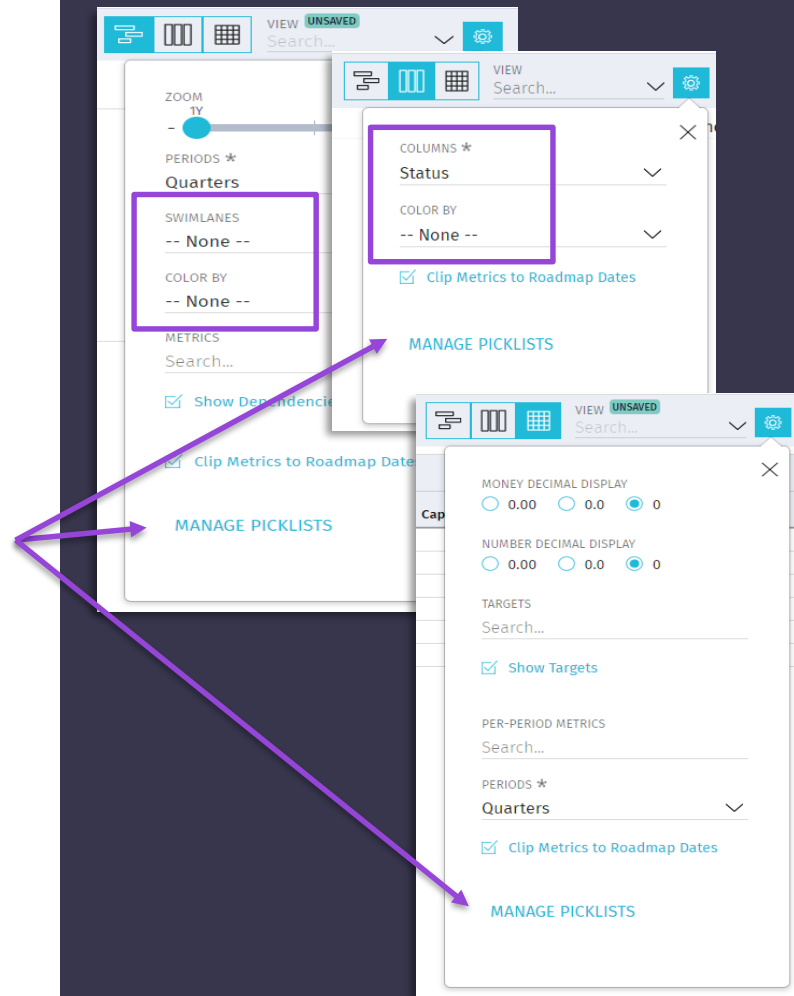
Right-Click Action: Delete Row to delete the Roadmap Item  
Pagination: Imported Investments displays 100 items per page



# Board Enhancements Supporting Details

# Manage Roadmap Local Picklists

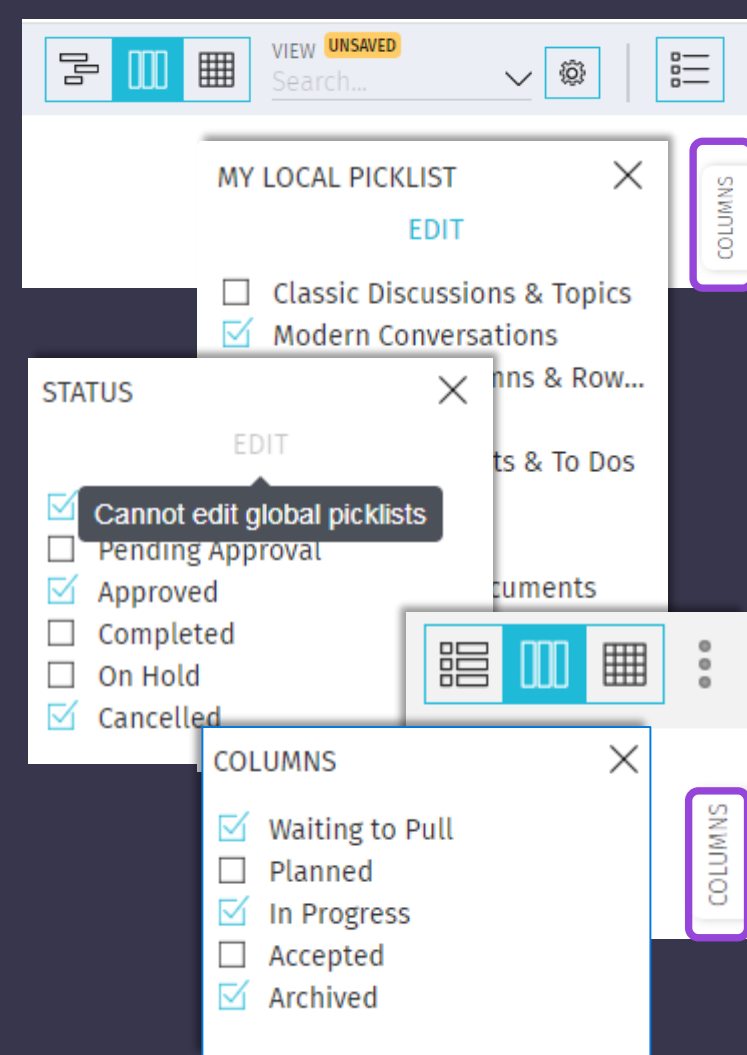
- Ability to create and manage Local Picklists is not easily discovered by the end user in Roadmaps
- Settings Panel now has a link to directly to manage local picklists
- The new MANAGE PICKLISTS link is now available on all 3 Roadmap pages – Timeline, Board and Grid
- Users can still access the link through the COLUMN, SWIMLANE and COLOR fields from the pull-down menu in the Settings pop-over on Timeline and Board pages





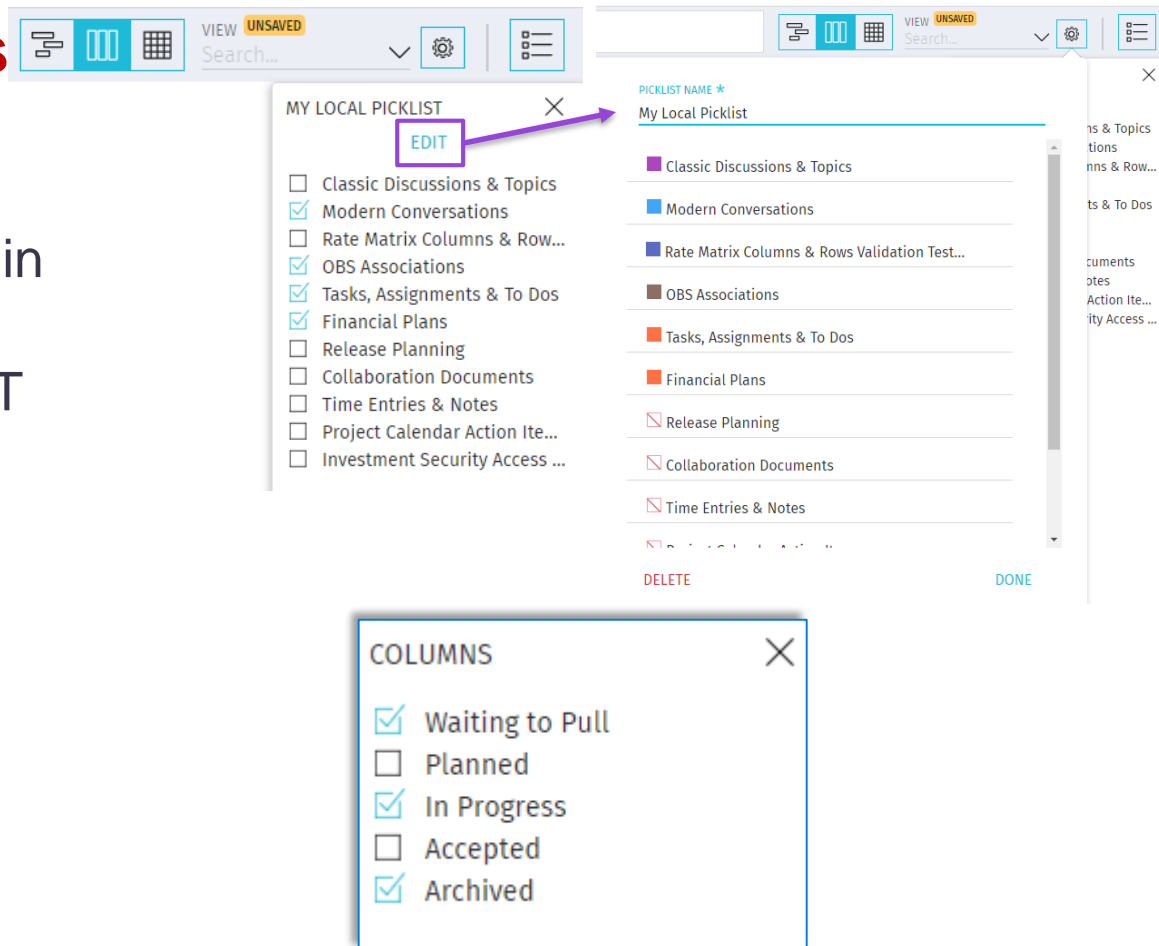
# Board Column Panel

- Enhanced the user experience in managing cards on a board with ability to hide columns from a column panel for the board
- Added another 'quick access' link to 'EDIT' (MANAGE) local picklists from the board column panel (in Roadmaps)
- New Column Panel available to boards:
  - Roadmap Items Board
  - Project Tasks Board



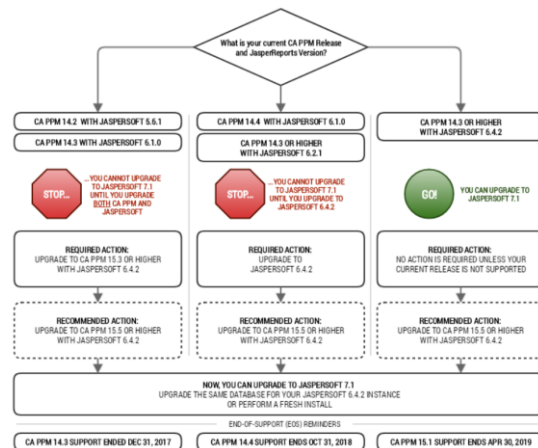
# Hide/Show Columns

- Roadmap Board
  - ‘None’ column
  - Global Picklist (edit in Studio)
  - Local Picklist – EDIT (manage)
  - Saved Views & Personalization
- Tasks Board
  - ‘Incoming’ column
  - Rename column
  - Insert column
  - Delete column

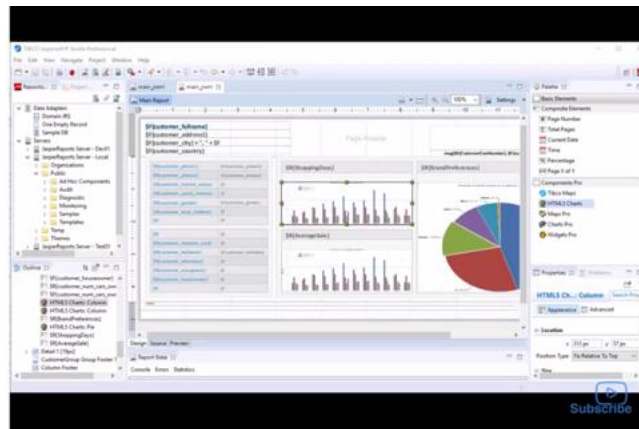


# Ready to go to Jaspersoft 7.1?

- New Upgrade Assistant
  - Helps customers with Supported Upgrade Paths
  - <https://docops.ca.com/x/p-42Hg>
- Getting Started With 7.1
  - <https://docops.ca.com/x/9IZNHQ>
- Recommend all new and existing customers install or upgrade directly to CA PPM 15.5
  - Existing customers can then upgrade from Jaspersoft 6.4.2 (the previous release) to 7.1 (the new release).
  - New installations of 15.5.1 in December 2018 will already include JasperSoft 7.1.



Jaspersoft 7.1 Upgrade Assistant

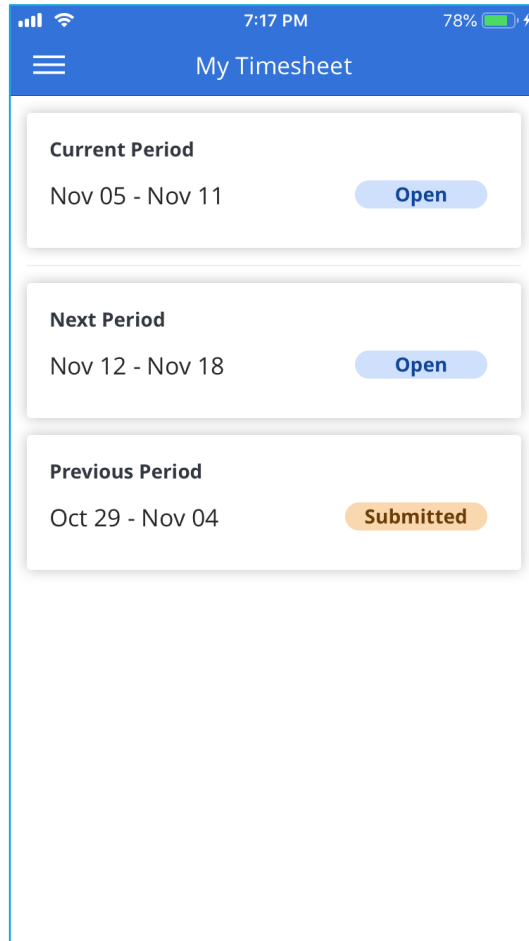
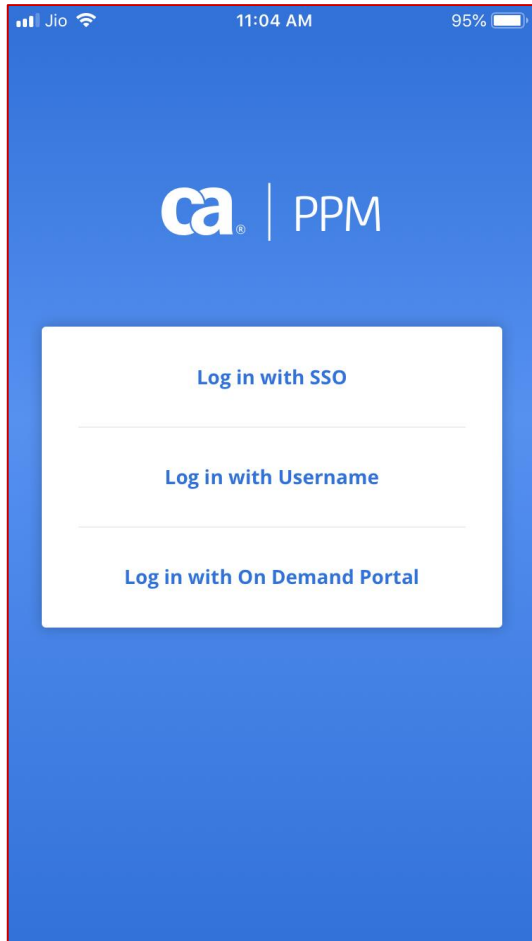


Jaspersoft 7.1 Overview Tutorial

# New! CA PPM Mobile 3.0

- Getting Started With CA PPM Mobile Apps
  - <https://docops.ca.com/x/iv42Hg>
- Introducing the completely redesigned CA PPM Mobile App
- Compatible with the new release of CA PPM 15.5.0.1
- Includes secure authentication and completely redesigned timesheet entry features.





The screenshot shows a detailed view of the timesheet for the period 'Oct 29 - Nov 04'. The status bar at the top shows '7:17 PM' and a 78% battery level. The header bar is blue with a back arrow on the left and the title 'My Timesheet' and subtitle 'Oct 29 - Nov 04' on the right. Below the header is a table with columns for 'Total', 'Mon 29', 'Tue 30', 'Wed 31', and 'Thu 01'. The 'Total' column has a value of '40.00'. Below the table, there are several sections with a light blue background, each containing a task name and a value in a white box. The tasks and their values are: 'Automated Security Enhancements (PR1016)' (10.00), 'Database Development' (10.00), 'Identify Infrastructure Requirements' (10.00), 'BYOD Management (PR1037)' (5.00), 'Risk Response and Mitigation Plan' (5.00), 'Unit and Performance Testing' (5.00), 'Usability and User Acceptance Testing' (5.00), and 'Change Mgt for Internal Portal (PR1024)' (5.00). At the bottom, there is a section for 'Database Development' with a blue circle containing three dots.

Total	Mon 29	Tue 30	Wed 31	Thu 01
40.00	8.00	8.00	8.00	8.00

Automated Security Enhancements (PR1016)

Database Development 10.00

Identify Infrastructure Requirements 10.00

BYOD Management (PR1037)

Risk Response and Mitigation Plan 5.00

Unit and Performance Testing 5.00

Usability and User Acceptance Testing 5.00

Change Mgt for Internal Portal (PR1024)

Database Development ...

# Enhancements for To Do's

Added 2 new attributes for To Do's:

## Due Date:

- Dates must be within Project Start/End Dates
- Editable for both Open and Completed To Do's
- No default value, Optional

## Owner:

- Can be Individual or Team
- Displays active Resources/Teams user has rights to view
- Editable for both Open and Completed To Do's
- No default value, Optional

The screenshot shows a web application window with a title bar containing a close button (X), a checkmark icon with '(1/3)', a user icon, and a menu icon. The main content area is divided into two sections: 'Open' and 'Completed'. The 'Open' section has a 'NEW TO DO' button in the top right corner. It lists two tasks: 'Create Functional Design Docs' with a due date of 'Dec 03 2018' and owner 'Peter Abrams', and 'Submit Designs for Approval' with an 'ASSIGN' button next to it. Below the tasks is an input field labeled 'Add a To Do'. The 'Completed' section lists one task: 'Review Technical Design with Architecture Team' with a due date of 'Dec 01 2018' and owner 'Architecture Team'.

Status	Task	Due Date	Owner
Open	Create Functional Design Docs	Dec 03 2018	Peter Abrams
Open	Submit Designs for Approval		ASSIGN
Completed	Review Technical Design with Architecture Team	Dec 01 2018	Architecture Team

# PMO Add-in Updates

## New Jaspersoft Studio Reports

Added 2 new Jaspersoft Studio reports to PMO:

- Project KPI Trends (Data Warehouse Trending data)
- Roadmap Timeline (PPM transactional data)

# PMO Add-in Updates

## Project KPI Trends Report

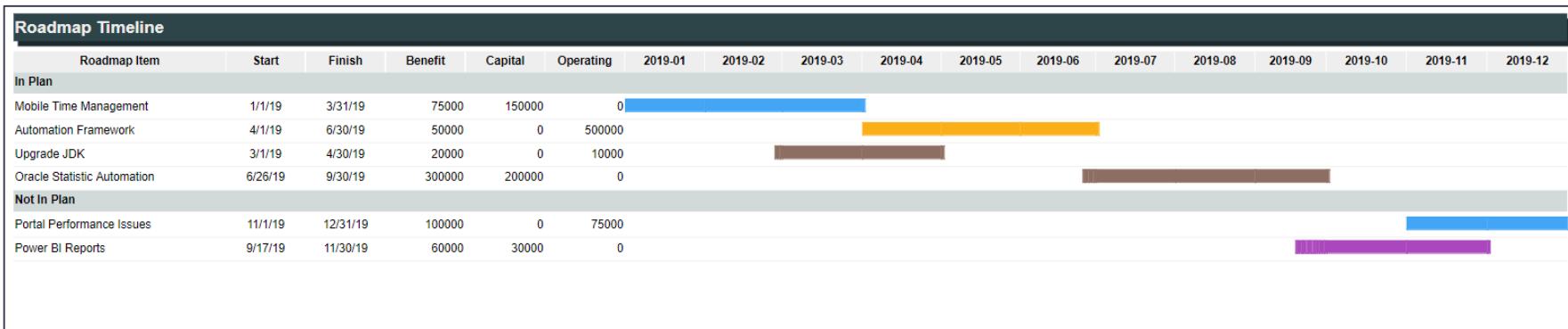
Project KPI Trends											
Project Name	Trend	Finish Date	Overall	Schedule	Scope	Cost	Risk	Open Risks	Open Issues	Open CRs	Open To Dos
Berks, Paul											
Financial Workflow Development	Current	3/31/19	⚠	⚠	⚠	✅	❌	2	2	0	0
	Trend 2	3/31/19	⚠	⚠	⚠	✅	⚠	2	2	0	0
	Trend 1	3/31/19	⚠	⚠	⚠	✅	✅	2	2	0	0
Martin, Paul											
Data Warehouse Performance Tuning	Current	3/20/19	❌	❌	❌	❌	✅	2	2	0	0
	Trend 2	3/20/19	❌	❌	❌	❌	❌	2	2	0	0
	Trend 1	3/13/19	⚠	✅	✅	❌	⚠	2	2	0	0
McCarthy, John											
Online Order Entry	Current	6/29/19	❌	❌	❌	❌	❌	3	2	0	0
	Trend 2	6/29/19	❌	❌	❌	❌	❌	3	2	0	0
	Trend 1	6/29/19	❌	❌	❌	❌	❌	3	2	0	0

**Note:** Data Warehouse Trends are required for this report



# PMO Add-in Updates

## Roadmap Timeline Report





# Agile Central / PPM Integrations

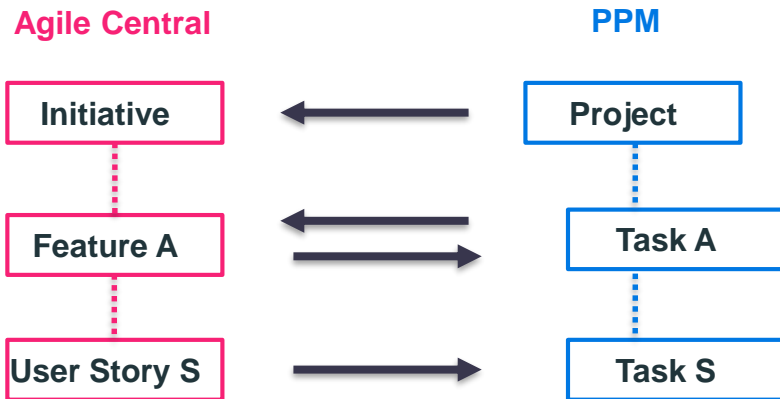
# Portfolio Item Type Integrations

## Update to Job Synchronization

### Portfolio Item (one to one mapping)

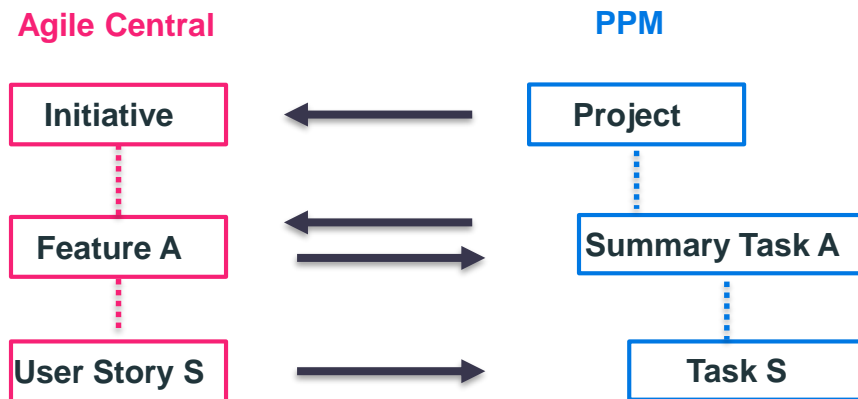
- PPM Project → Parent Portfolio Item
- PPM Task → Child Portfolio Item

#### Job: Synchronize Agile Central



**New Update:** All new Features and User Stories will now be created in the Task WBS hierarchy at Level 1. Once a hierarchy is captured (indented) using the Project Object Action, it will be preserved during later runs of this Job.

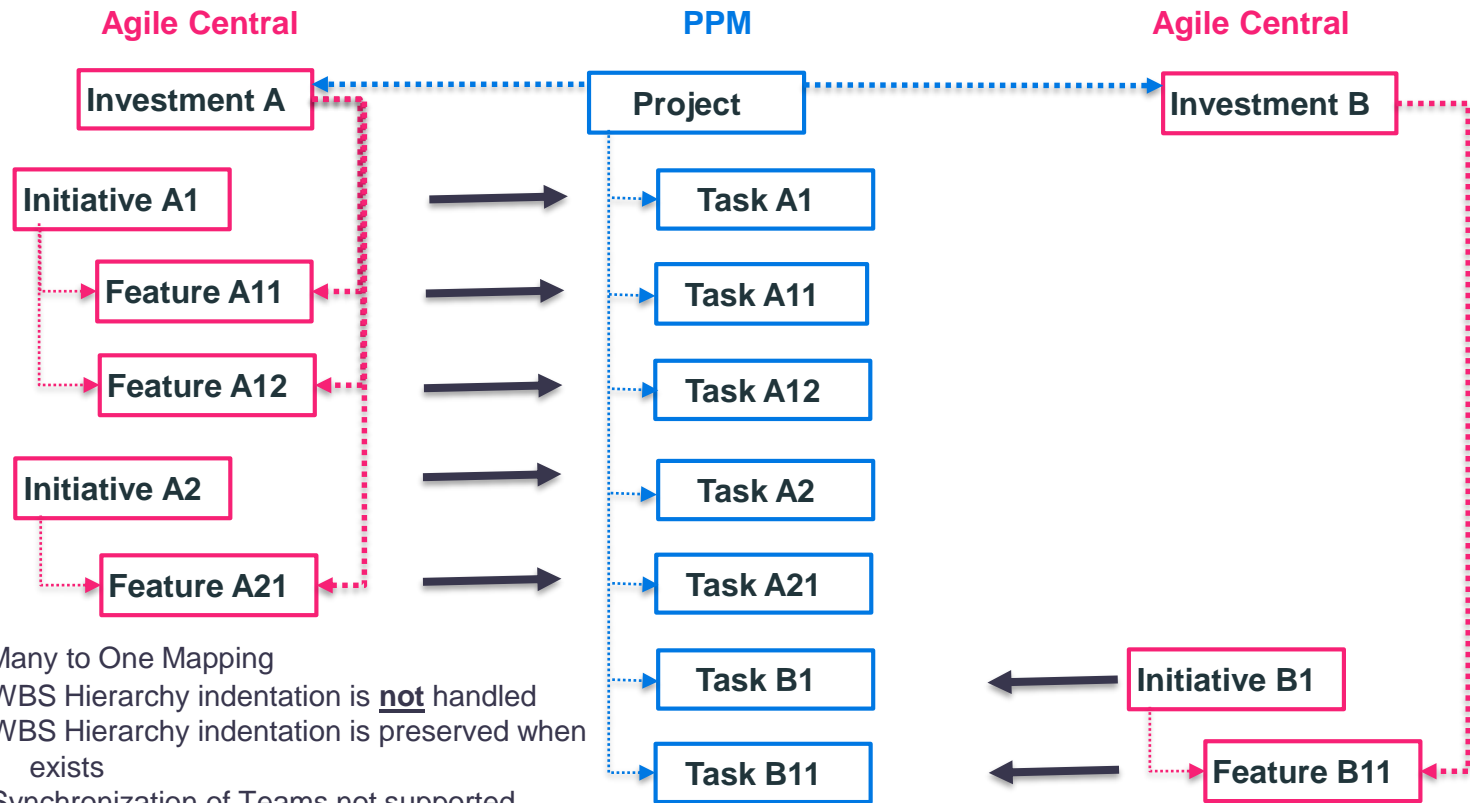
#### Project Object Action: Synchronize Agile Central



Feature and User Story hierarchy will still be maintained and preserved

# Agile Central Investment Type Integrations

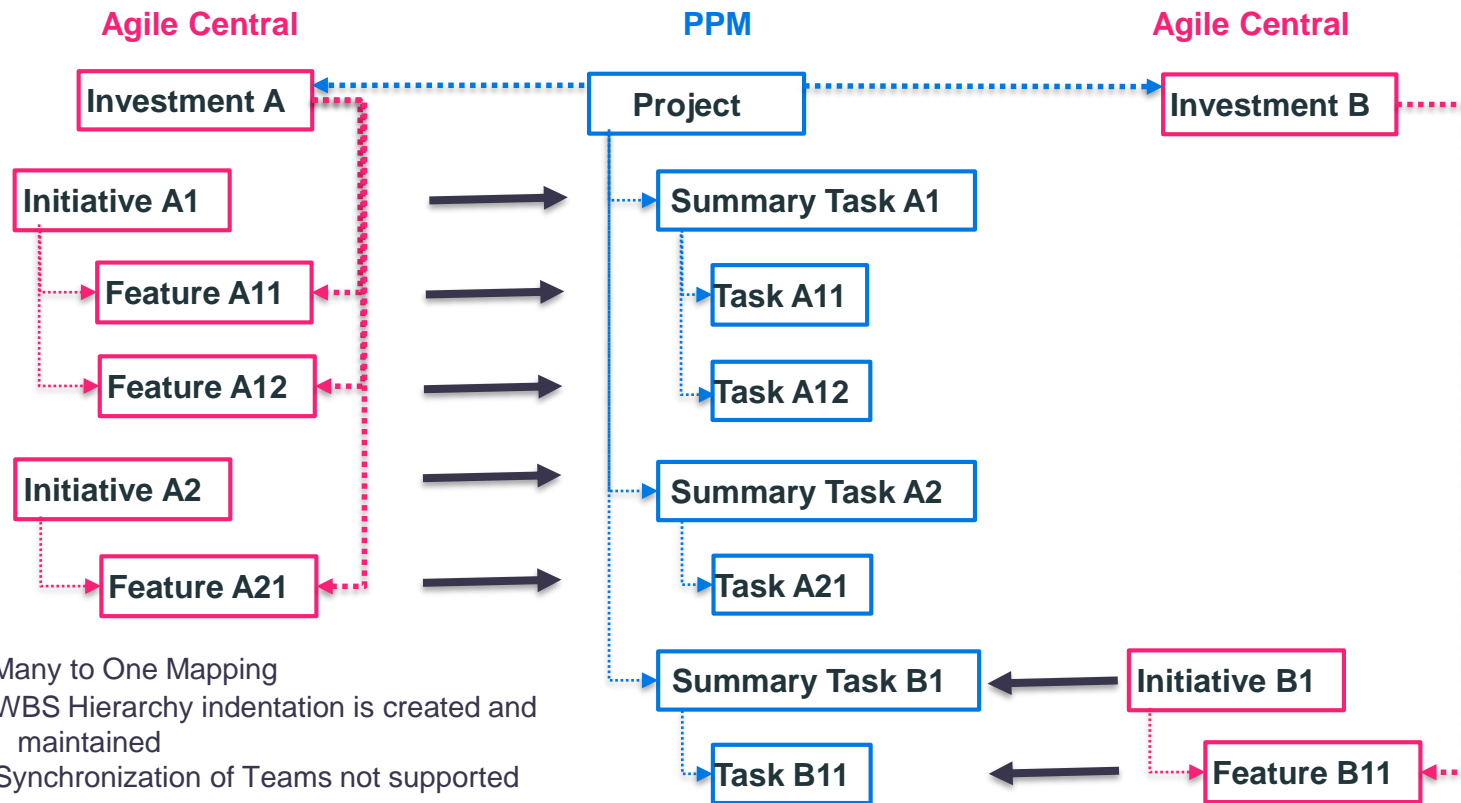
Job: Synchronize Agile Central



**Notes:** Many to One Mapping  
WBS Hierarchy indentation is **not** handled  
WBS Hierarchy indentation is preserved when exists  
Synchronization of Teams not supported

# Agile Central Investment Type Integrations

## Project Object Action: Synchronize Agile Central

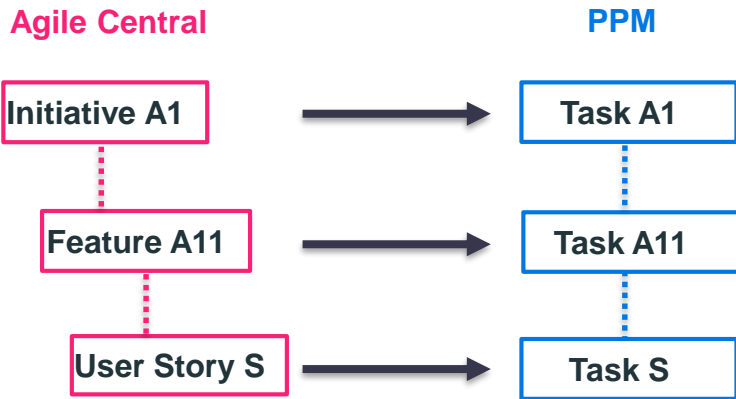


**Notes:** Many to One Mapping  
WBS Hierarchy indentation is created and maintained  
Synchronization of Teams not supported

# Agile Central Investment Type Integrations

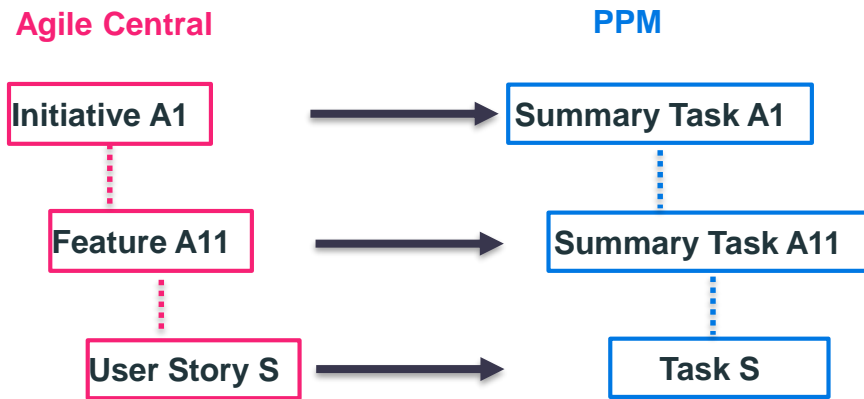
## User Story Synchronization

### Job: Synchronize Agile Central



**New Update:** All new Features and User Stories will now be created in the Task WBS hierarchy at Level 1. Once a hierarchy is captured (indented) using the Project Object Action, it will be preserved during later runs of this Job.

### Project Object Action: Synchronize Agile Central



Feature and User Story hierarchy will still be maintained and preserved

# Agile Central Investment Type Integrations

## Creation of Agile Central Investments

Agile Central Investment will be created and associated to the PPM Project:

The screenshot displays the 'CA PPM' interface for 'BYOD Management'. The top navigation bar includes tabs for CONVERSATIONS, TASKS, LINKS, STATUS, FINANCIALS, RISKS, ISSUES, CHANGES, DOCUMENTS, DETAILS, and STAFF. The 'DETAILS' tab is active. Below the navigation bar, there are sections for PROJECT SUMMARY, STAKEHOLDERS, and AGILE SUMMARY. The AGILE SUMMARY section contains a red-bordered box with the following text:

CREATE AGILE CENTRAL INVESTMENT

LAST AGILE INVESTMENT CREATED ...

Aug 13 2018

LAST AGILE INVESTMENT STATUS

New BYOD Investment Agile Central investment was su...

A red arrow points from the 'CREATE AGILE CENTRAL INVESTMENT' section to the 'AGILE CENTRAL INVESTMENTS' search results. The search results show a list with a checked box next to 'BYOD Investment'.

Project's Last Agile Investment Created Date and Last Agile Investment Status attributes are updated with the most recent Agile Central Investment creation date and status

# Agile Central Investment Type Integrations

## Agile Central Investment Associations

In Agile Central, associate your new Agile Central Investment to Portfolio Item(s):

The screenshot displays the Agile Central interface for 'Acme Corporation'. On the left, under 'PROJECTS', there is a section titled '2 PORTFOLIO ITEMS FOR IV202'. This section contains a table with two rows of portfolio items. A red arrow points from the 'Add New' button in this section to the 'IV202' investment details panel on the right.

RANK	ID	NAME	STATE	OWNER	PROJECT
1	F2456	Demo Feature 1	Measuring	ITC Admin Portfolio M...	Acme Corporation
2	F2457	Demo Feature 2	Developing	ITC Admin Portfolio M...	Acme Corporation

The right panel shows the details for 'IV202' investment. It includes fields for NAME, COLOR, START DATE, END DATE, AMOUNT, and progress bars for PERCENT DONE BY STORY PLAN ESTIMATE, PERCENT DONE BY WORKDAYS, and PERCENT CHILD ARTIFACTS SCHEDULED.

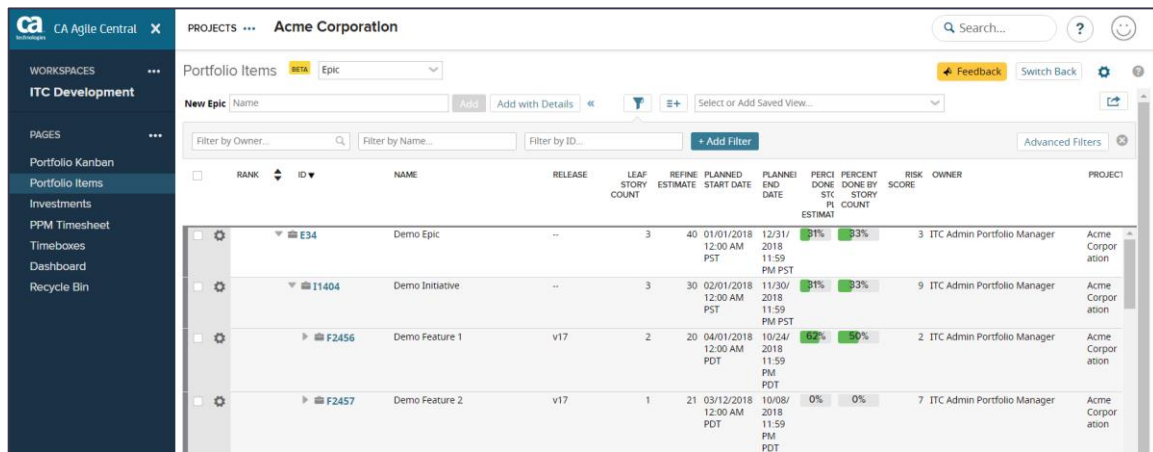
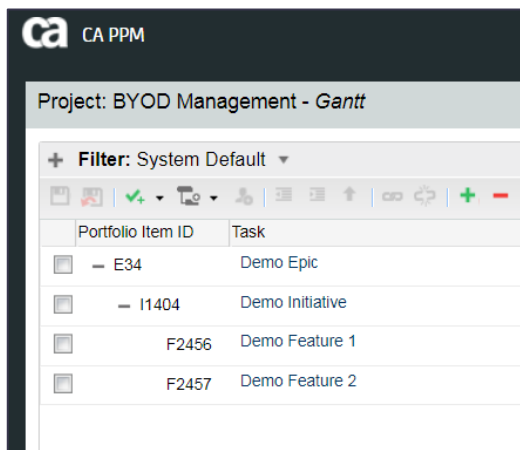
Note: Only Portfolio Items at the lowest level in the Portfolio Item hierarchy can be associated to Agile Central Investments



# Agile Central Investment Type Integrations

## Agile Central Investment Associations

In PPM, run the Synchronize Agile Central Project Object Action to bring in the relevant Agile Central Investment's Portfolio Item hierarchy into PPM as Tasks:



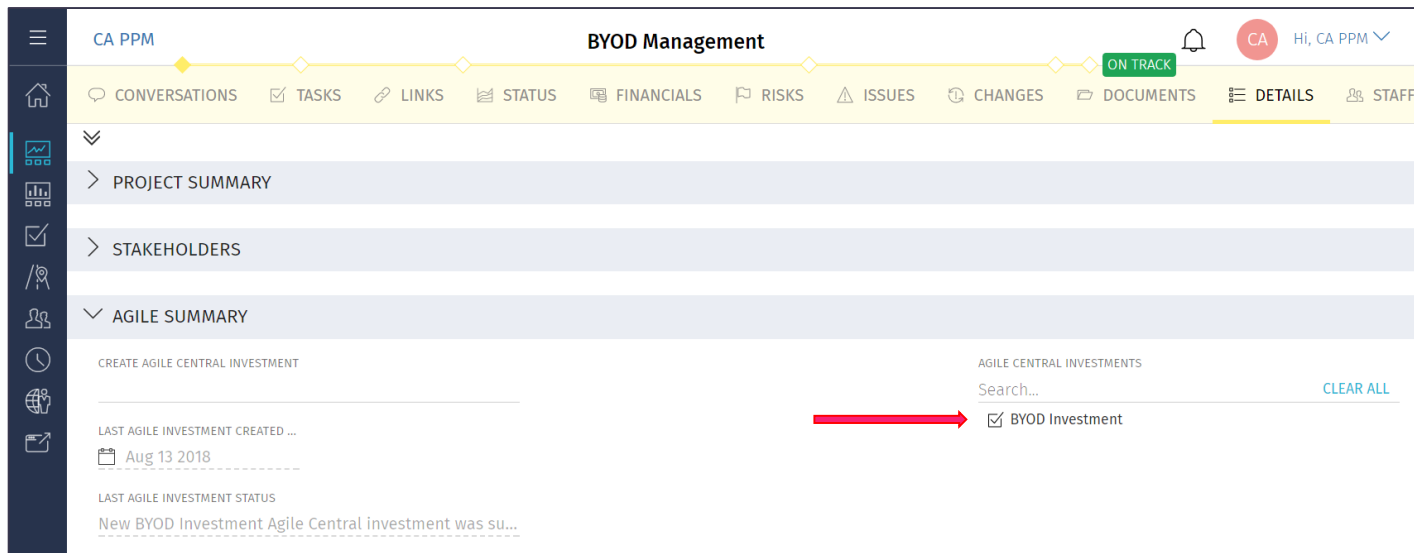
**Notes:** Running Synchronize Agile Central in Reports & Jobs will bring in all relevant Tasks at Level 1 in the Task WBS Hierarchy for each Project; Running Synchronize Agile Central as a Project Object Action will bring in all relevant Tasks at their correct WBS level in the Task WBS Hierarchy for the Project.

# Agile Central Investment Type Integrations

## Agile Central Investment Associations

### To remove an Agile Central Investment association from PPM Project:

Uncheck the Agile Central Investment checkbox in the Project's Agile Central Investment field

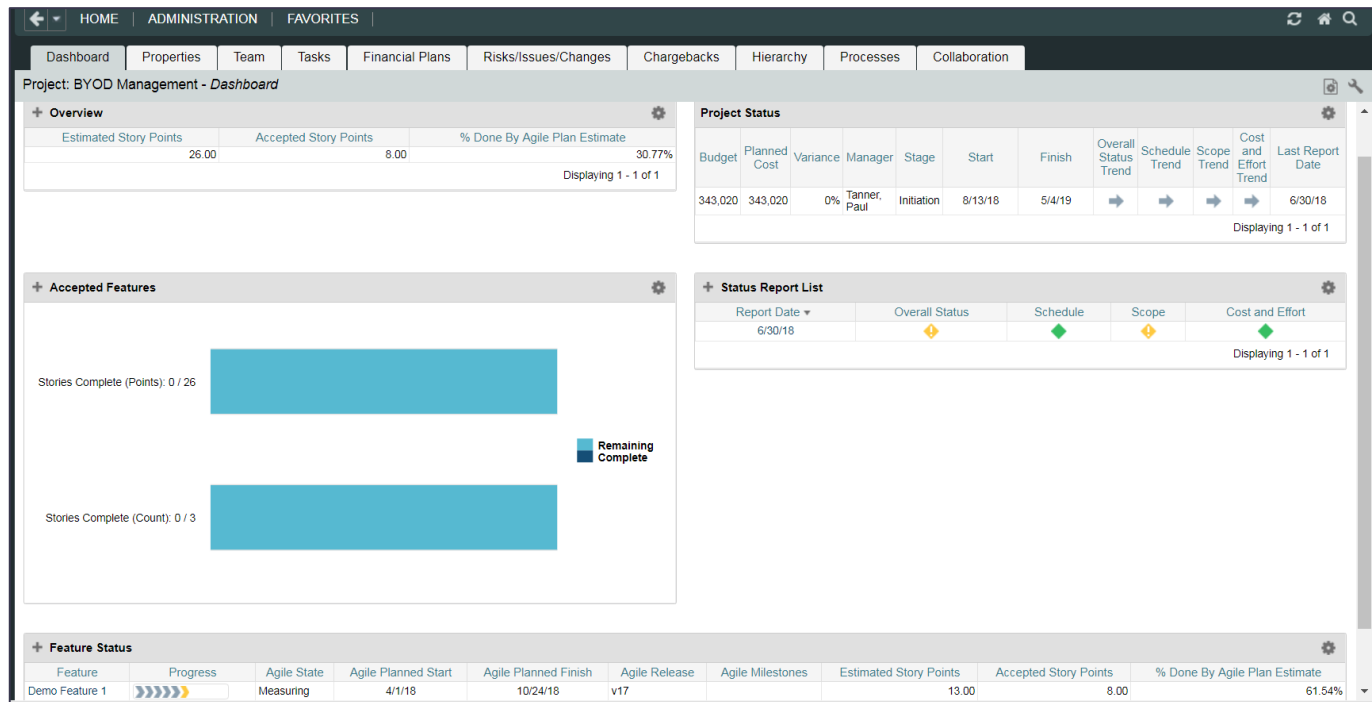


The screenshot displays the CA PPM interface for a project named 'BYOD Management'. The top navigation bar includes a sidebar with icons for home, conversations, tasks, links, status, financials, risks, issues, changes, documents, details, and staff. The main content area shows the 'AGILE SUMMARY' section expanded, revealing a table of Agile Central Investments. A red arrow points to the 'BYOD Investment' checkbox, which is currently checked. The table also includes a search bar and a 'CLEAR ALL' link.

AGILE CENTRAL INVESTMENTS	
Search...	<input checked="" type="checkbox"/> BYOD Investment

# Agile Central Investment Type Integrations

## Agile Project Status Dashboard



Note: The Product Roadmap Dashboard is not available for Investment type integrations



**Thank You.**

