

# CA Project & Portfolio Management

CA PPM: The Road Ahead

CA PPM User Group meeting, September 2017



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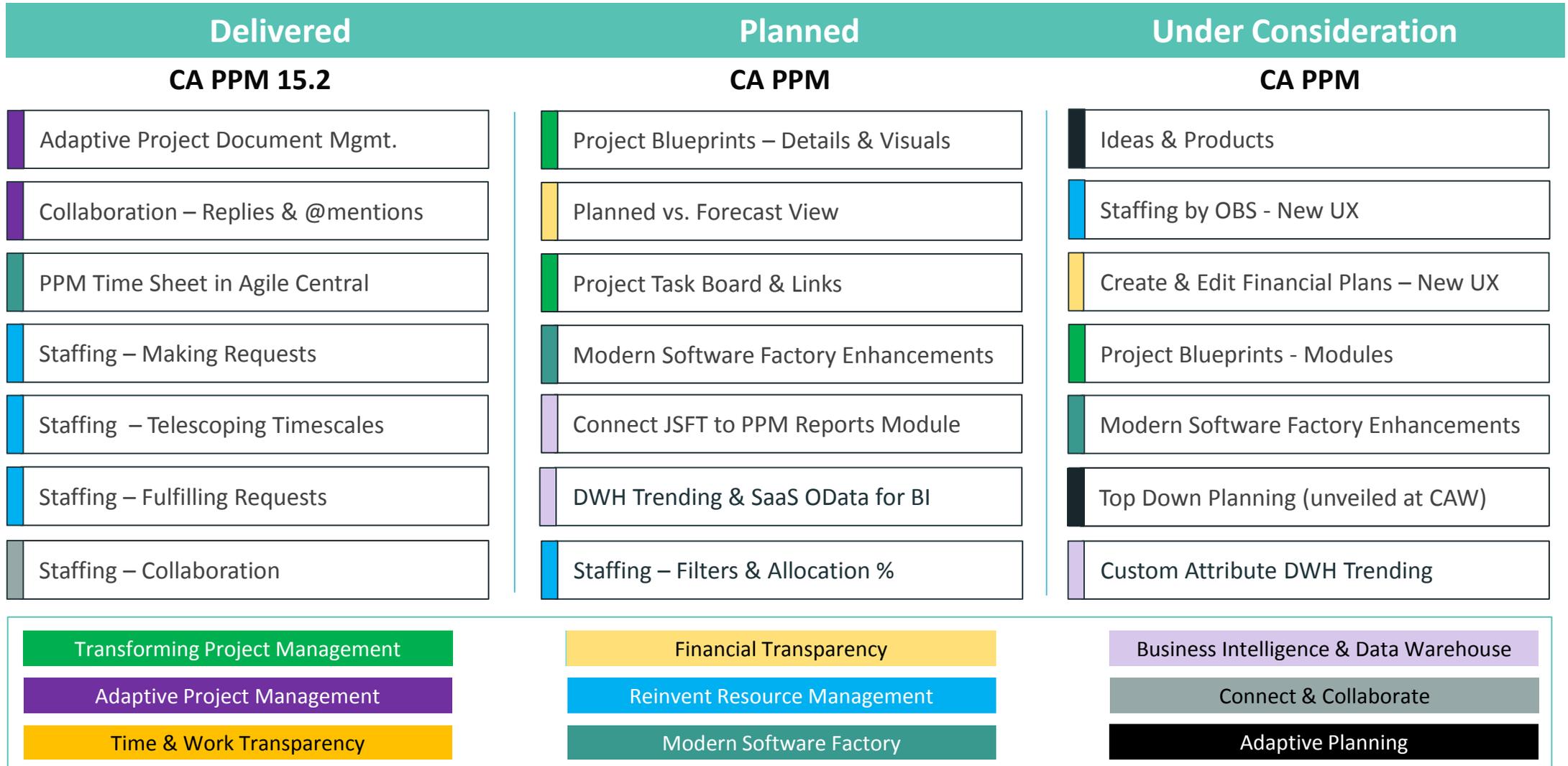
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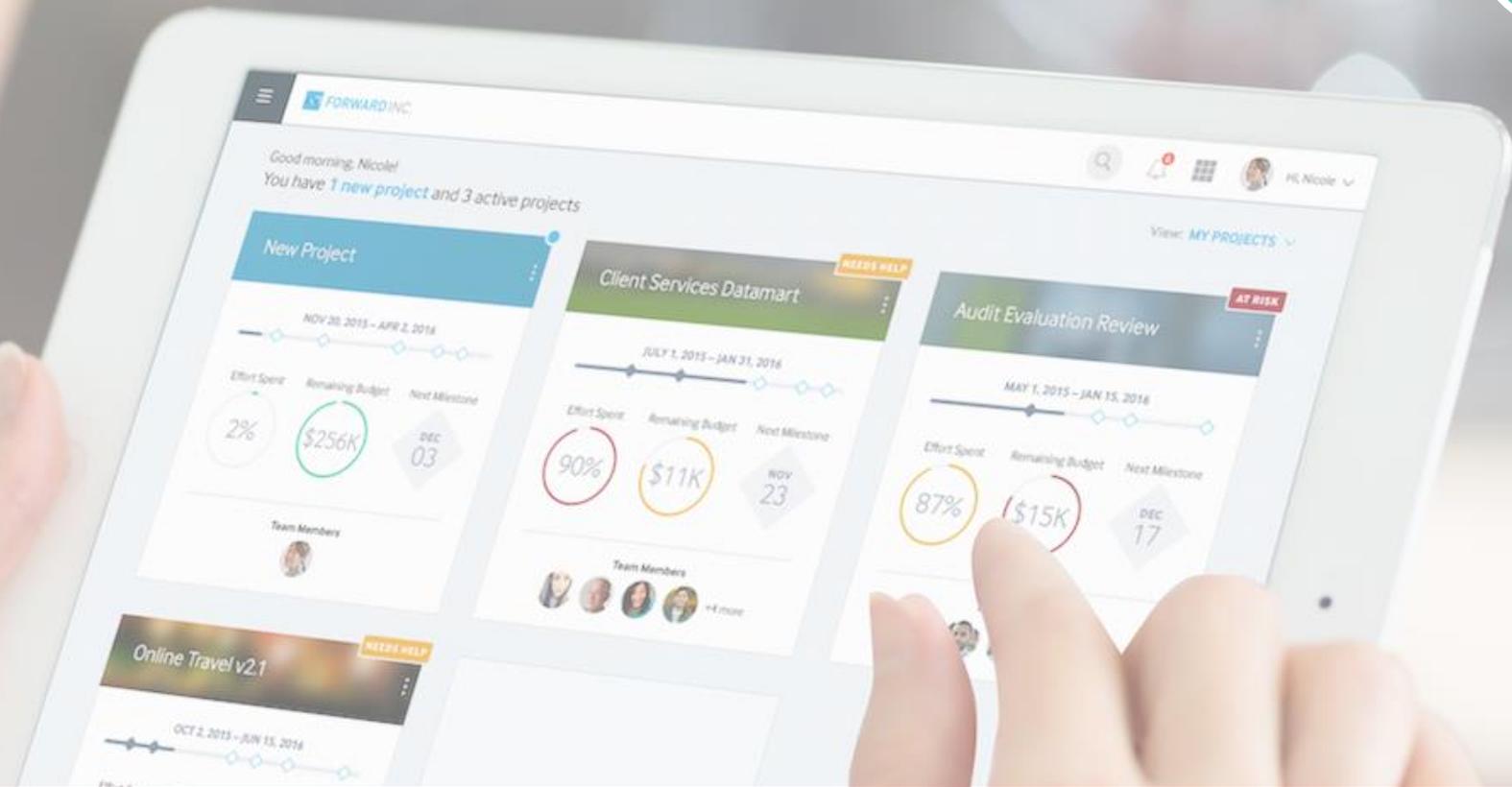


# Product Update

# Roadmap: CA PPM

Timeline as of *July 1, 2017*





## Reinventing PPM: Power You Need. The Experience You'll Love

# Driving Innovation with PPM



Modernizing and extending the Platform for Customers & the Future

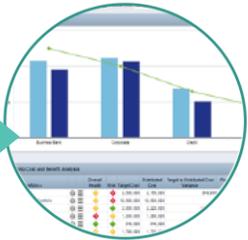
Re-examined how Projects get done in the Application Economy

Re-examined Resource Staffing and Agile with Time & Work Transparency

Re-examined Financial Transparency, the Power of BI & Team Task Boards

Enabling solutions for surfacing product and investment strategy and portfolios

14.x



- CA PPM DWH
- RESTful APIs
- Accelerated APM
- PPM + AC Integration 1

15.1



- Ethnography | Modern UX
- Adaptive PM
- Time Management 1
- Connect & Collaborate

15.2



- Resource Staffing
- PPM & AC Integration 2
- Time & Work Transparency 2

15.3



- Financial Transparency
- BI – Portfolio Analytics
- Task Boards | Blueprints
- Robust Project Management

Beyond



- Top Down Planning
- Resource Staffing 2
- Financial Transparency 2
- Product Management
- Ideation



# Recap: Delivered Since September 2016



The collage displays several key features of the CA PPM software:

- Project Dashboards:** Overview screens for projects like 'SSStar Project Kickoff', '828 Enhancements', and 'Industry Trade Show', showing progress metrics such as effort spent, budget spent, and next milestones.
- Document Management:** A 'Documents' view for the 'Industry Trade Show' project, listing files like 'Staff Handbook.doc' and 'Trade Show etiquette2...' with details on owner, modified date, and size.
- Resource Staffing:** Two tables showing resource allocation by month (2017-01 to 2017-07) for various roles like Business Architect and Systems Analyst, with columns for FTE and Totals.
- Time Entry & Approval:** A 'MY TIMESHEET' and 'REVIEW & APPROVE' screen showing a calendar grid with time entries for August 2016, including submission and approval status.
- Collaboration:** A 'CONVERSATIONS' chat window for the 'Industry Trade Show' project, showing team members and their messages.
- Status Reports:** A 'Status Update' and 'Effort Metrics' section for the 'Industry Trade Show' project, providing a detailed overview of project progress, key accomplishments, and upcoming work.

✓ Adaptive Projects

✓ Document Management

✓ Resource Staffing

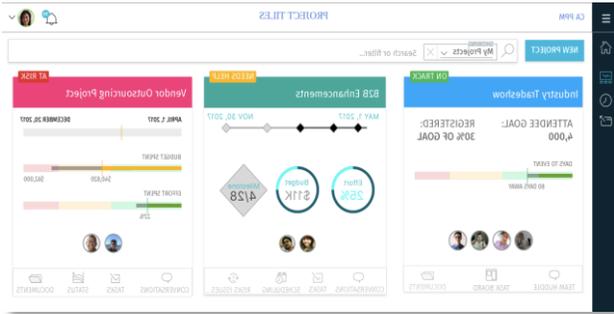
✓ Time Entry & Approval

✓ Collaboration

✓ Living Status Report

✓ Enter & Approve Time for Others

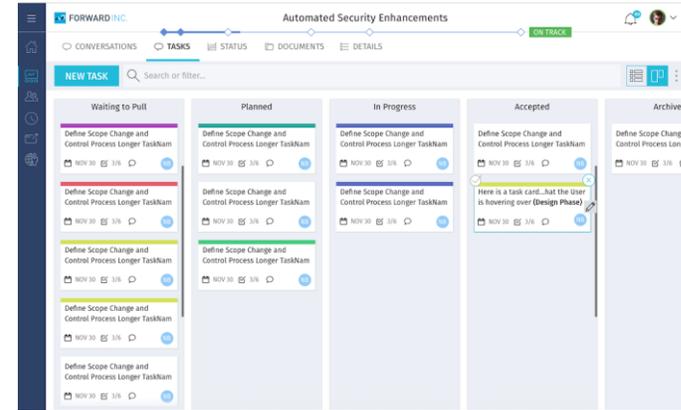
# Work in Progress



Automated Security Enhancements

Financial Plan Name :

Cost Type	Transaction Class	Role	Q1 2017				Q2 2017				TOTALS
			PLANNED	ACTUALS	REMAINING	% SPENT	PLANNED	ACTUALS	REMAINING	% SPENT	
Optix			33,000	39,000	(6,000)	118%	33,000	33,000	0	100%	1,000,000
Data Center			16,000	22,000			16,000	16,000	0	100%	400,000
Material			5,000	5,000	0	100%	5,000	5,000	0	100%	100,000
Internal		Developer	1,000	1,000	0	100%	1,000	1,000	0	100%	20,000
Internal		Developer	1,000	7,000	(6,000)	700%	1,000	1,000	0	100%	20,000
Internal		Architect	1,000	1,000	0	100%	1,000	1,000	0	100%	20,000
Subcontractor		Developer	1,000	1,000	0	100%	1,000	1,000	0	100%	20,000
Subcontractor		Developer	1,000	1,000	0	100%	1,000	1,000	0	100%	150,000
Subcontractor		Architect	1,000	1,000	0	100%	1,000	1,000	0	100%	50,000
Caplix			17,000	17,000	0	100%	17,000	17,000	0	100%	400,000
Internal		Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	100,000
Internal		Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	8,000
Internal		Architect	2,000	2,000	0	100%	2,000	2,000	0	100%	120,000
Subcontractor		Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	20,000
Subcontractor		Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	120,000
Subcontractor		Architect	2,000	2,000	0	100%	2,000	2,000	0	100%	20,000



Blueprinting. Enables configurable:

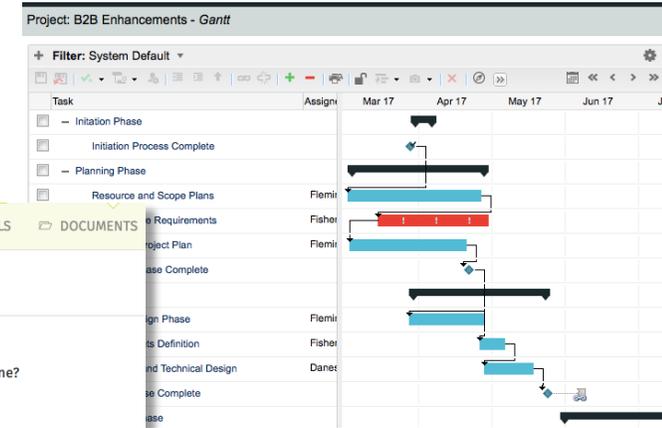
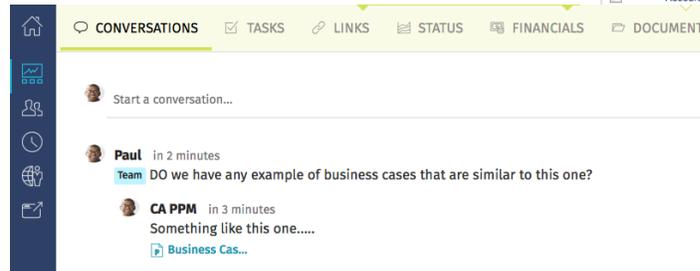
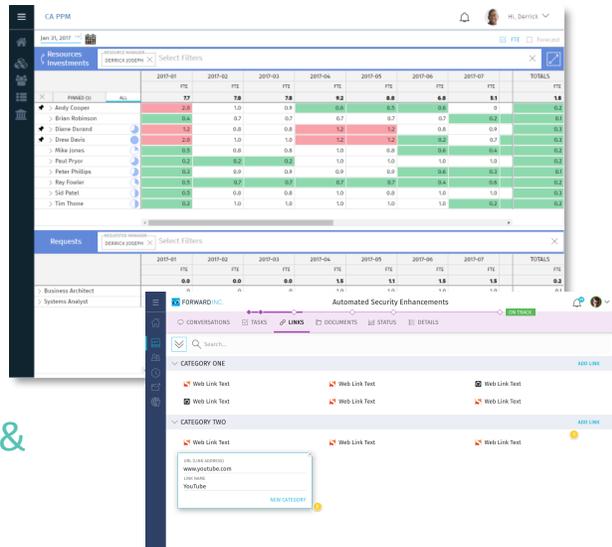
- Fields
- Visuals
- Links

Financial Plans

- Plans
- Forecasts
- Transaction Review

Project Task Board

Links to MSP, Gantt, OWB



Staffing filtering & allocation enhancements

Links for SharePoint & other sites

Collaboration: Social Task Management

# Enable Organizational Configurations: Blueprinting

Onboard a new department in minutes, each with their own custom attributes and visuals.



CA PPM		
Search or filter...		
>>	NAME	LAST USED
>	Product Development Blueprint	
>	IT Blueprint	
>	Marketing Blueprint	
>	Standard Project	Jul 10, 2017

# Enable Organizational Configurations: Blueprinting

Easily create new page sections and drag attributes where you need them. Build a page in 60 seconds or less.



The screenshot shows the 'IT Blueprint' configuration page in the CA PPM system. The interface is divided into a left sidebar, a top navigation bar, and a main content area.

- Top Bar:** Shows 'CA PPM', 'IT Blueprint', a notification bell, a user profile 'CA Hi, CA PPM', and three action buttons: 'EXIT', 'DISCARD EDITS', and 'PUBLISH'.
- Left Sidebar:** Contains navigation icons and a 'FIELDS' panel. The 'FIELDS' panel has a search bar and an 'ADD SECTION' button. Below it is a list of fields: ACTUALS, ACTUAL COST, ACCEPTED USER STORIES, ACCEPTED STORY POINTS, AGILE ACTUAL FINISH, AGILE ACTUAL START, ESTIMATED USER STORIES, ESTIMATED STORY POINTS, INITIATIVE EXTERNAL ID, INITIATIVE ID, AGILE INVESTMENT CATEGORY, LAST AGILE SYNC DATE, AGILE MILESTONES, % DONE BY STORY COUNT, and % DONE BY AGILE PLAN ESTIMATE.
- Main Content Area:** Displays the blueprint configuration for 'PROJECT SUMMARY', 'AGILE MEASURES', and 'SETTINGS'.
  - PROJECT SUMMARY:** Includes fields for NAME \*, INVESTMENT ID \*, PROJECT TYPE, WORK STATUS, START \*, FINISH \*, and OBJECTIVE.
  - AGILE MEASURES:** Includes fields for ESTIMATED STORY POINTS, AGILE INVESTMENT CATEGORY, % DONE BY AGILE PLAN ESTIMATE, ACCEPTED STORY POINTS, AGILE MILESTONES, and % DONE BY STORY COUNT.
  - SETTINGS:** Includes fields for TRACK MODE, FINANCIAL STATUS, and BANNER COLOR.

# Enable Organizational Visuals: Blueprinting

Provide visual options for project tiles. Populate visuals with predefined indicators.



The screenshot displays the 'IT Blueprint - EDIT MODE' interface in CA PPM. The top navigation bar shows 'CA PPM' on the left and 'IT Blueprint - EDIT MODE' on the right. Below this, there are tabs for 'DETAILS' and 'VISUALS', with 'VISUALS' being the active tab. A search bar is located below the tabs. A list of visual indicators is shown on the left side of the main content area, each with a radio button or diamond icon for selection:

- BUDGET REMAINING
- BUDGET SPENT
- DAYS REMAINING
- DAYS TO START
- EFFORT REMAINING
- EFFORT SPENT
- FINISH DATE
- NEXT MILESTONE
- START DATE

The main content area shows a preview of the project tile. It features a 'Project Name' header, a 'TIMELINE' section with three visual indicators: 'EFFORT SPENT' (a circular progress indicator), 'BUDGET SPENT' (a circular progress indicator), and 'NEXT MILESTONE' (a diamond shape). Below the timeline is a 'TEAM MEMBERS' section.

# Empower Team Planning: Project Task Board

Simplify work management with configurable Task Boards.



The screenshot shows a project task board for 'Automated Security Enhancements' at 'FORWARD INC.'. The board is organized into columns: 'Waiting to Pull', 'Planned', 'In Progress', and 'Accepted'. A 'NEW TASK' button and a search filter are at the top. A 'Test Plans' task card is highlighted with a blue border and a pink shadow. The board includes various task cards with dates (NOV 30), progress indicators (3/6), and user avatars. A 'PARKING LOT' section is visible at the bottom.

Waiting to Pull	Planned	In Progress	Accepted
Global Training Plan NOV 30 3/6	Customer Interviews NOV 30	Customer Feedback NOV 30	Phase 1 Delivery NOV 30
Staffing NOV 30 3/6	Jobs to be Done Research NOV 30	Compliance NOV 30	Project Launch NOV 30
Test Plans NOV 30 3/6	Prototype NOV 30	Supportability Training NOV 30	Business Plan Acceptance NOV 30 3/6
Short Task Name NOV 30	Stakeholder Review NOV 30	BI Analytics NOV 30	Charter and Team Kickoff NOV 30 3/6
Define Rollout Plan NOV 30 3/6	Architecture Review NOV 30		
	Short Task Name		

# Collaborate and Share – In Context Conversations

Capture decisions and work product in one place. Manage “To Do’s” on phases, tasks and milestones.



The screenshot displays the 'Automated Security Enhancements' project page for 'FORWARD INC.'. The interface is divided into several sections:

- Navigation:** A top bar with 'CONVERSATIONS', 'TASKS', 'STATUS', 'DOCUMENTS', and 'DETAILS' tabs. A 'NEW TASK' button and a search bar are also present.
- Task Board:** A Kanban-style board with three columns: 'Waiting to Pull', 'Planned', and 'In Progress'.
  - Waiting to Pull:** Includes 'Global Training Plan', 'Staffing', 'Test Plans' (highlighted with a callout), and 'Define Rollout Plan'. Each task shows a date (NOV 30) and progress (3/6).
  - Planned:** Includes 'Customer Interviews', 'Jobs to be Done Research', 'Prototype', 'Stakeholder Review', and 'Architecture Review'. Each task shows a date (NOV 30).
  - In Progress:** Includes 'Customer Feedback', 'Compliance', 'Supportability Training', and 'BI Analytics'. Each task shows a date (NOV 30).
- Conversation Window:** A floating window on the right titled 'Start a conversation...'. It shows a chat history with messages from Mary Zimmerman and Nicole Fleming. Mary Zimmerman asks for an update, and Nicole Fleming replies that they are waiting for a final review. Mary Zimmerman then asks to review a document before a meeting.

# Visualize Schedule & Dependencies – Gantt, OWB, MSP

Link to the PPM Gantt, OWB and MSP for robust plans requiring scheduling and dependency capabilities



The screenshot displays the CA PPM interface for the 'eCommerce Portal' project. The main view shows a task list with phases: Initiation Phase (May 01 - May 01) and Planning Phase (May 01 - Jul 09). Tasks include 'Initiating Process Complete', 'Define Scope Change and Control Process', 'Travel Expense', 'Define Resource Plan', 'Risk Response and Mitigation Plan', 'Identify Storage Requirements', 'Identify Infrastructure Requirements', 'Complete Project Plan', and 'Planning Phase Gate Complete'. A 'NEW TASK' button and search bar are visible at the top. A 'Needs Help' button is also present.

An inset window titled 'Project: eCommerce Portal - Gantt' shows a Gantt chart view. The chart displays tasks as bars on a timeline from May 17 to August 17. The tasks are color-coded and linked to show dependencies. The Gantt chart includes a filter for 'System Default' and a table of assigned resources for each task.

Task	Assigned Resource	Start Date	End Date
+ Initiation Phase		May 01	May 01
- Planning Phase		May 01	Jul 09
Define Scope Change and Control Process	Martin, Paul;Newt	May 01	May 02
Travel Expense	Travel	May 02	May 02
Define Resource Plan	Martin, Paul	May 02	May 16
Risk Response and Mitigation Plan	Goldman, Mark;Ki	May 19	May 26
Identify Storage Requirements	Newburg, Mary	May 26	Jun 02
Identify Infrastructure Requirements	Newburg, Mary;St	Jun 02	Jun 09
Complete Project Plan	Goldman, Mark;M	Jun 09	Jul 09
Planning Phase Gate Complete		Jul 09	Jul 09

# Gain Financial Insights – Forecasting & Actuals

Powerful column pivots, Forecast & Plan comparisons



FORWARD INC. Automated Security Enhancements MAY 1 DECEMBER 30 ON TRACK

CONVERSATIONS TASKS DOCUMENTS STATUS RISKS & ISSUES FINANCIALS DOCUMENTS STATUS PROJECT

ADD ROWS VIEW Planned to Forecast Financial Plan Name SHOWING Units

GROUP BY Cost Type

Cost Type	Transaction Class	Role	Q1 2017				Q2 2017				TOTALS
			PLANNED	FORECAST	VARIANCE	% VARIANCE	PLANNED	FORECAST	VARIANCE	% VARIANCE	PLANNED
			33,000	39,000	(6,000)	118%	33,000	33,000	0	100%	1,000,000
OpEx			16,000	22,000	(6,000)	138%	16,000	16,000	0	100%	400,000
	Data Center		5,000	5,000	0	100%	5,000	5,000	0	100%	100,000
	Material		5,000	5,000	0	100%	5,000	5,000	0	100%	20,000
	Internal	Developer	1,000	1,000	0	100%	1,000	1,000	0	100%	20,000
	Internal	Developer	1,000	7,000	(6000)	700%	1,000	1,000	0	100%	20,000
	Internal	Architect	1,000	1,000	0	100%	1,000	1,000	0	100%	20,000
	Subcontractor	Developer	1,000	1,000	0	100%	1,000	1,000	0	100%	20,000
	Subcontractor	Developer	1,000	1,000	0	100%	1,000	1,000	0	100%	150,000
	Subcontractor	Architect	1,000	1,000	0	100%	1,000	1,000	0	100%	50,000
CapEx			17,000	17,000	0	100%	17,000	17,000	0	100%	600,000
	Data Center		5,000	5,000	0	100%	5,000	5,000	0	100%	100,000
	Internal	Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	8,000
	Internal	Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	120,000
	Internal	Architect	2,000	2,000	0	100%	2,000	2,000	0	100%	20,000
	Subcontractor	Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	120,000
	Subcontractor	Developer	2,000	2,000	0	100%	2,000	2,000	0	100%	20,000
	Subcontractor	Architect	2,000	2,000	0	100%	2,000	2,000	0	100%	200,000

# Change Your Perspective - Pivot & Focus

Use color legend to hide and show columns. Drag and drop to group and subtotal.



CA PPM eCommerce Portal

CONVERSATIONS TASKS LINKS STATUS FINANCIALS DOCUMENTS DETAILS

VIEW: Planned To Forecast

Cost Plan by Cost Type and Transaction Class

Group By

Cost Type	Transaction...	2017-05				2017-06				2017-07	TOTALS			
		PLANNED	FORECAST	VARIANCE	% VARIANCE	PLANNED	FORECAST	VARIANCE	% VARIANCE	PLANNED	PLANNED	FORECAST	VARIANCE	% VARIANCE
		62,100	0	62,100	100%	45,380	0	45,380	100%	47,600	414,200	306,720	107,480	26%
Capital	Internal Labor	0	0	0	0%	0	0	0	0%	35,100	214,300	214,300	0	0%
Capital	Software	0	0	0	0%	0	0	0	0%		40,000	40,000	0	0%
Capital	External Labor	0	0	0	0%									
Operating	Internal Labor	36,200	0	36,200										
Operating	External Labor	13,900	0	13,900										
Operating	Travel	12,000	0	12,000										

CA PPM eCommerce Portal

CONVERSATIONS TASKS LINKS STATUS FINANCIALS DOCUMENTS DETAILS

VIEW: Planned To Forecast

Cost Plan by Cost Type and Transaction Class

Transaction Class

Transaction Class	Cost Type	2017-05	2017-06	2017-07	2017-08	2017-09	2017-10	2017-11	2017-12
		PLANNED							
		62,100	45,380	47,663	88,737	41,737	59,003	52,080	17,500
External Labor (2)		13,900	24,500	0	12,600	1,400	0	11,500	0
	Capital	0	0	0	12,600	1,400	0	11,500	0
	Operating	13,900	24,500	0	0	0	0	0	0
Internal Labor (2)		36,200	20,880	47,663	36,137	40,337	59,003	40,580	17,500
	Capital	0	0	35,143	36,137	40,337	59,003	40,580	3,100
	Operating	36,200	20,880	12,520	0	0	0	0	14,400
Software (1)		0	0	0	40,000	0	0	0	0
	Capital	0	0	0	40,000	0	0	0	0
Travel (1)		12,000	0	0	0	0	0	0	0
	Operating	12,000	0	0	0	0	0	0	0

# Visibility at Your Fingertips - Transaction Review

## Review financial transactions with actual cost drill downs



FORWARD INC. Automated Security Enhancements MAY 1 DECEMBER 30 ON TRACK

CONVERSATIONS TASKS DOCUMENTS STATUS RISKS & ISSUES FINANCIALS DOCUMENTS STATUS PROJECT

VIEW PERIOD: Monthly VIEW: Planned to Actuals Financial Plan Name

GROUP BY: Cost Type

Cost Type	Transaction Class	Role	Q1 2017				Q2 2017				TOTALS
			PLANNED	ACTUALS	REMAINING	% SPENT	PLANNED	ACTUALS	REMAINING	% SPENT	PLANNED
<b>OpEx</b>			<b>33,000</b>	<b>39,000</b>	<b>-6,000</b>	<b>118%</b>	<b>33,000</b>	<b>33,000</b>	<b>0</b>	<b>100%</b>	<b>1,000,000</b>
	Data Center		5,000	5,000	0	100%	5,000	5,000	0	100%	100,000
	Material		5,000	5,000	0	100%	5,000	5,000			

NOTES:

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FORWARD INC. Automated Security Enhancements MAY 1 DECEMBER 30 ON TRACK

CONVERSATIONS TASKS DOCUMENTS STATUS RISKS & ISSUES FINANCIALS DOCUMENTS STATUS PROJECT

TRANSACTION REVIEW

GROUPING: OpEx / Internal / Developer FISCAL PERIOD: 05-2017

Transaction Date	Phase	Task	Cost Type	Charge Code	Resource	Resource Dept.	Location	Resource Class	Transaction Class	Input Type Code	User V
1/8/17	Initiati...Phase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	
1/7/17	Plannin...hase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	
1/6/17	Plannin...hase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	
1/5/17	Plannin...hase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	
1/4/17	Design Phase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	
1/3/17	Design Phase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	
1/2/17	Design Phase	Task Name 1	Operating	Design	Smith, Joe	Agile	Chicago	Internal Labor	Internal Labor	Billable	



# Streamline Staffing Allocations – Manage by Allocation %

Allocation % allows Staffing Manager to distribute people to work with a single entry.



CA PPM
Hi, CA PPM

Current Time Period
 FTE  Forecast

**Resources**

INVESTMENT: Automated Security Enhanc... Search or filter...

	2017-07	2017-08	2017-09	2017-10
	FTE	FTE	FTE	FTE
<b>8.00</b>	<b>2.26</b>	<b>2.81</b>		
<b>Bruce Turner</b>	<b>2.00</b>	<b>0</b>	<b>0.05</b>	
Automated Security Enh...	2.00	0	0.05	
> Erin Gillian	1.00	0	0.64	
> Jason Berry	1.00	0	0.64	
> Jason Sauer	1.00	0.35	0.29	
> Mark Goldman	1.00	0.78	0.24	
> Mary Newburg	1.00	0.35	0.71	
> Valerie Childers	1.00	0.78	0.24	

**Requests**

ROLE: Architect Search or filter...

	2017-07	2017-08	2017-09	2017-10
	FTE	FTE	FTE	FTE
<b>10.84</b>	<b>14.72</b>	<b>16.82</b>		
> Architect	10.84	14.72	16.82	

**BT Bruce Turner**

Automated Security Enhancements (PR1016)

DETAIL
CONVERSATIONS

INVESTMENT  
Automated Security Enhancements (PR1016)

INVESTMENT MANAGER  
Paul Berks

ALLOCATION DATES  
START DATE: Jul 01 2017      FINISH DATE: Nov 16 2017

ALLOCATION %  
**100**

INVESTMENT ROLE  
Test Engineer

BOOKING STATUS  
Soft

FORECAST RATE

Open for Time Entry

# Keeping the Team Engaged – Conversations

## Capturing decisions and shared learnings



CA PPM

Eclipse Enhancements

On Track

CONVERSATIONS TASKS LINKS STATUS FINANCIALS DOCUMENTS DETAILS

Start a conversation...

**Logan** Mar 29, 2017 5:03 pm  
Team Will anyone be able to help me on the requirements section? Just looking ahead and want to be prepared. Thanks!

**Lee** Mar 29, 2017 5:04 pm  
Logan Everett I can work on this.

Logan Everett Lee Clark Thanks! I am attaching the latest Requirements spreadsheet.

Requirem...

ATTACH POST

**Dana** Mar 29, 2017 5:00 pm  
Hey Team - the project plan is coming along nicely but I will probably need some help. Anyone available?

**Sam** Mar 29, 2017 5:01 pm  
Dana Lewis I can help!

Reply...

**Dana** Mar 29, 2017 5:00 pm  
Congratulations to Team for meeting the first milestone - way to go!

Reply...

TEAM

+ Member 1-12 of 12

KARL LEE SAGE LOGAN  
TANNER BARB DANA MARK  
SAM SARA GRACE TARA

Hi, Dana

- ✓ Embed URL's in conversations.
- ✓ Attach documents
- ✓ Project, Task and Resource level conversations

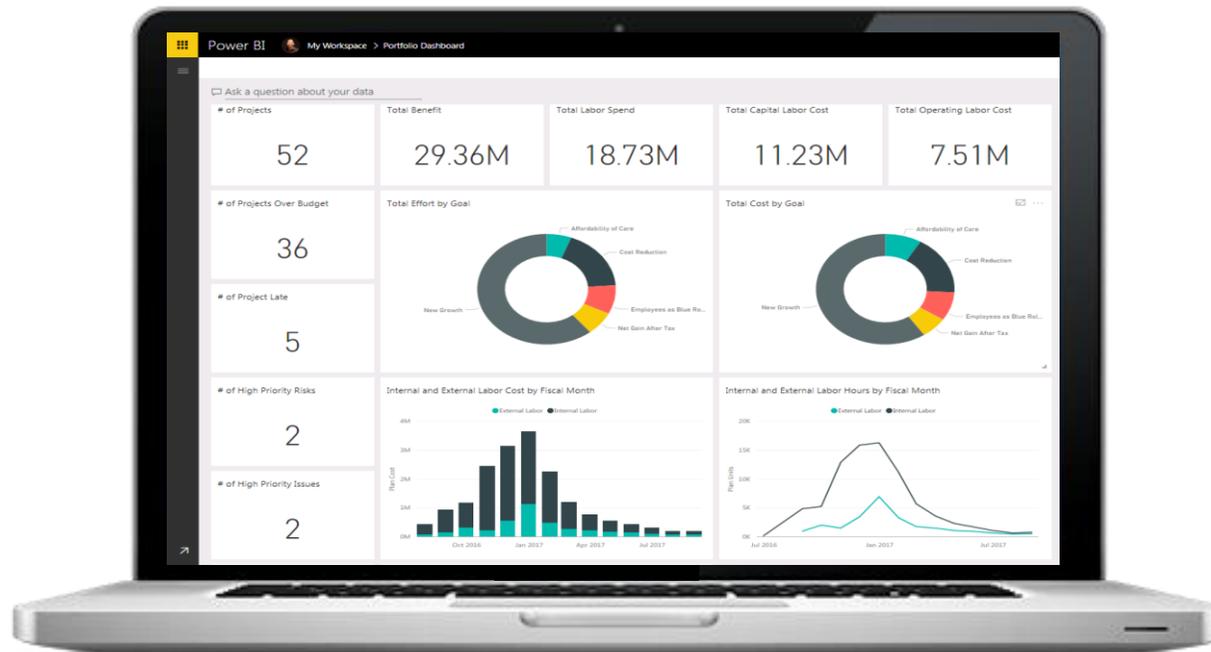
# Consolidate Access to Project Collateral – Project Links

One stop shopping for project team artifacts: SharePoint, Google Docs, Wiki, Power BI, Agile, etc.



The screenshot shows a web interface for 'FORWARD INC.' with a project titled 'Automated Security Enhancements'. The status is 'ON TRACK'. The main navigation bar includes 'CONVERSATIONS', 'TASKS', 'LINKS', 'DOCUMENTS', 'STATUS', and 'DETAILS'. The 'LINKS' section is expanded, showing two categories: 'Project Sites' and 'Dashboards'. Under 'Project Sites', there are links for 'Product Wiki Page', 'Steve's Sharepoint Site', 'Customer Interviews', 'PMO Knowledge Store', 'Customer Feedback – Google Docs', and 'Defect tracking'. Under 'Dashboards', there are links for 'Project Dashboard', 'Issue & Risk Trending', and 'Status Trending'. A modal window is open for adding a new link, with the following fields: 'URL (LINK ADDRESS)' containing 'www.youtube.com', 'LINK NAME' containing 'Customer Interviews', and a 'NEW CATEGORY' button. A notification badge with the number '1' is visible on the 'Status Trending' link.

# Predict Outcomes and Prevent Failures Data Warehouse Trending



## Introducing Trending

- Resource or Investment Org changes
- Investment status changes over time
- Investment burn rates
- Budget, forecast, actual costs
- Issue, risk and change status
- Hours available, allocated, etc.
- Utilization

Predict Outcomes by using trending of leading and lagging indicators.



# Mapping Agile Initiatives to PPM



## ADVANCED PROJECT



## INITIATIVE

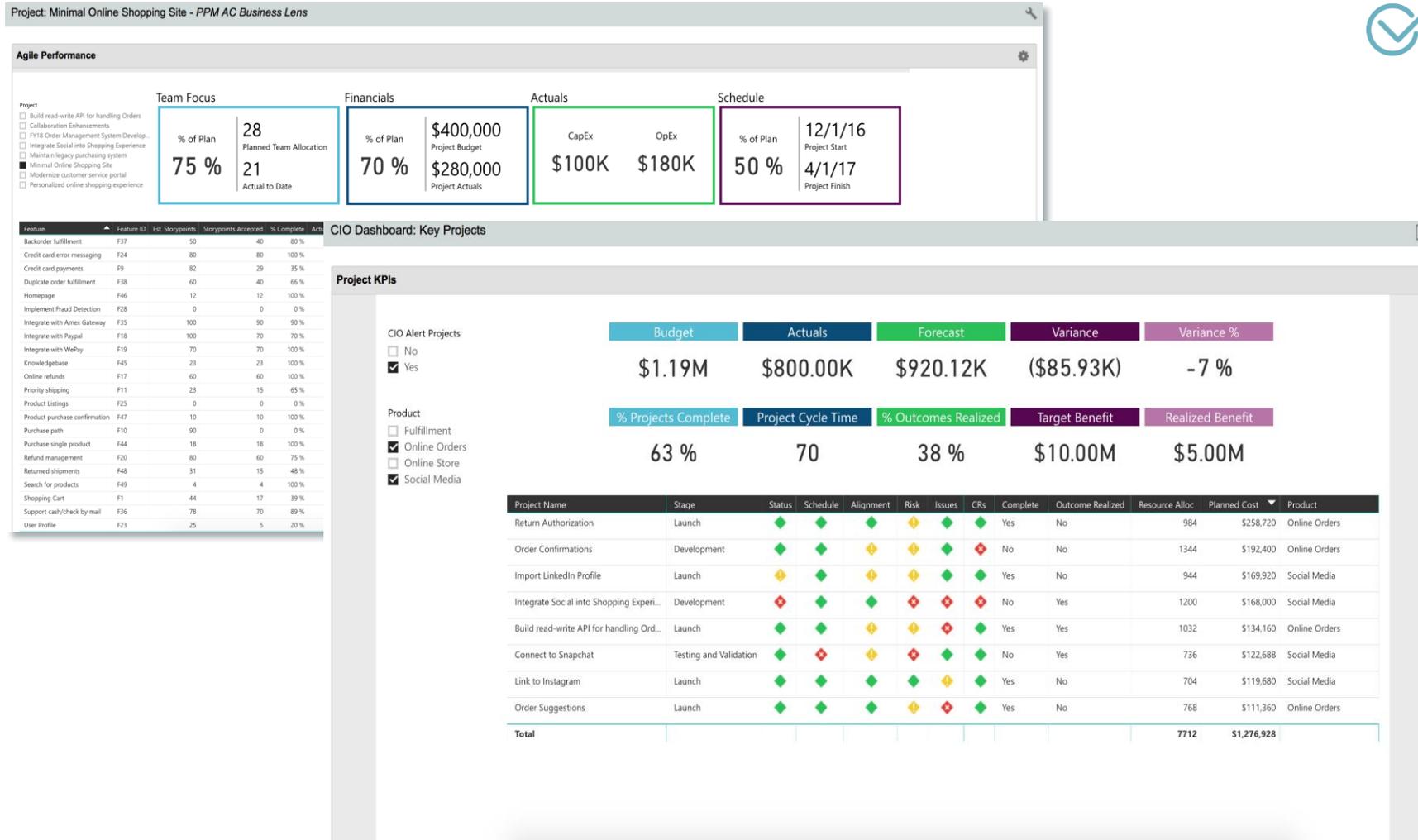


## Mapped Attributes: AC + PPM



- Agile State
- Agile Preliminary Estimate
- Agile Planned Start & Finish
- Estimated & Accepted Story Points
- % Done by Agile Plan Estimate
- Agility Risk & Value Score
- Agility Actual Start & Finish
- Estimated & Accepted User Stories
- % Done by Story Count
- Investment Category
- Release
- Milestone

# The Business Lens: At a Glance Understanding of Funding & Delivery



✓ Provide clear and concise optics to inform stakeholders of all aspects of funding and execution

# Planned Integration Enhancements

Continued Improvements to the integration of work & funding



## INTEGRATION FLEXIBILITY

- ✓ Ability for a PPM Investment owner to sync a single project with Agile Central on demand. This option augments the previously delivered mass update and scheduling utility.
- ✓ Bi-directional Feature mapping. The ability to have features originate in BOTH Agile Central AND PPM.

## EMBEDDED PPM TIMESHEET INTEGRATION

- ✓ Support Single Sign On for Agile Central users accessing the embedded PPM Timesheet.
- ✓ Time Tracking Template: provide a template of tasks to be appended to each Feature imported from Agile Central. Bi-directional.



## Training Courses

# CA PPM

We have public PPM classes with instructor – VIRTUALLY – in English on the following courses:

- 4-6 October - CA PPM 15.2: Project and Investment Management 200  
[http://www.ca.com/media/education/Course\\_Descriptions/33CLR25101.pdf](http://www.ca.com/media/education/Course_Descriptions/33CLR25101.pdf)
- 6 November - CA PPM 15.2: Ad Hoc Views, Reports, and Dashboards 200  
[http://www.ca.com/media/education/Course\\_Descriptions/33CLR2515B.pdf](http://www.ca.com/media/education/Course_Descriptions/33CLR2515B.pdf)

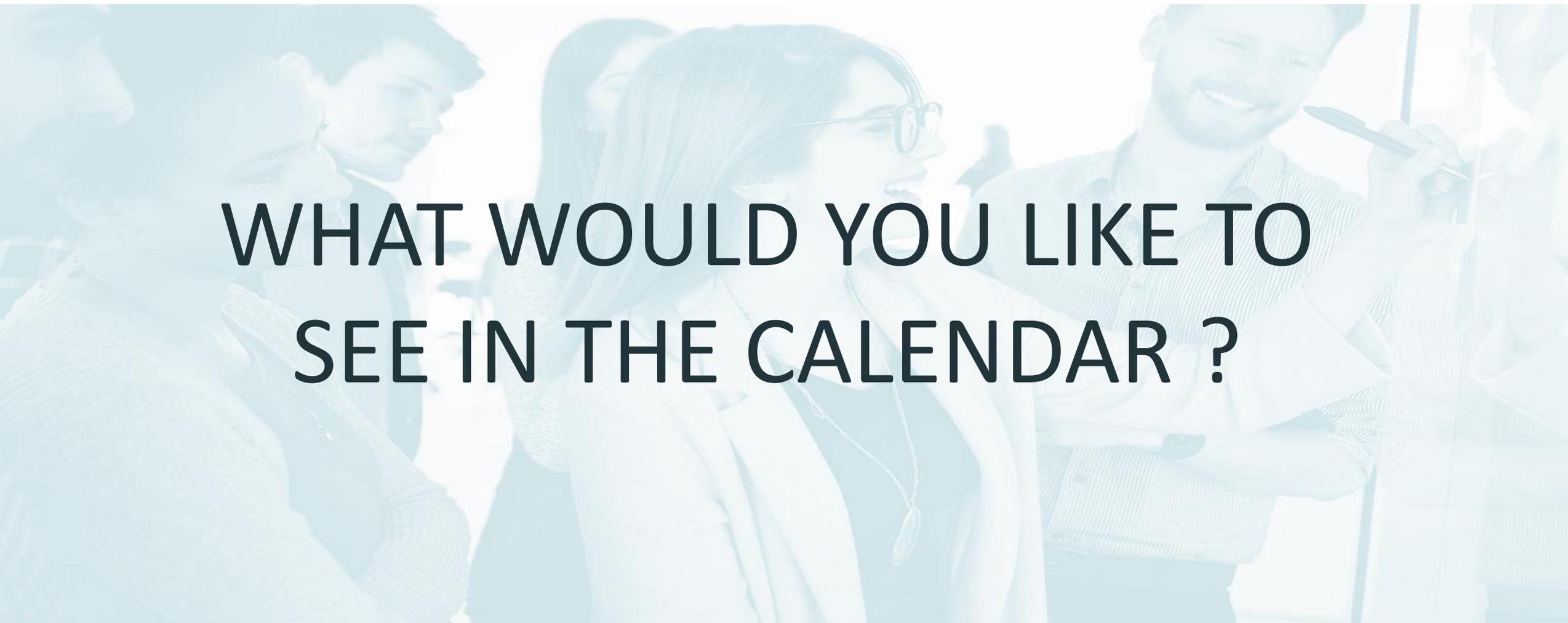
# Reporting – planned

## PPM Reporting Foundation Training (full course description available):

- CA PPM 15.2 Ad Hoc Views, Reports and Dashboards 200 (1 day) (9th October – 11th October)
- CA PPM 15.2 Reporting Administration 200 (2 days)
- **Total Cost: 1.611 EUR per person**

## PPM Reporting Advanced Training (full course description available):

- CA PPM 15.2 Building Custom Reports 300 (2 days)
- Please note: The PPM Reporting Foundation Training is a prerequisite session for this class.
- **Total Cost: 1.074 EUR per person**



**WHAT WOULD YOU LIKE TO  
SEE IN THE CALENDAR ?**



## Events

# ca World<sup>®</sup> '17

NOVEMBER 13-17, 2017

MANDALAY BAY RESORT & CASINO, LAS VEGAS

## Project and Portfolio Management Program Guide

### The Modern PMO: Evolve with your changing business needs.

Whether you're expanding global portfolios, dipping your toes in agile or upgrading to the cloud, CA World helps you modernize the project management office with fresh ideas from the user community. Solve your problems and fuel your ambitions with stories from Boeing, eBay and Sky. Meet the CA Project & Portfolio Management (CA PPM) product team for the latest best practices and a sneak peek of the road map. This year's four-day event offers something for everyone:

- 19 customer case study presentations
- 12 pre-conference classes
- Seven product demo areas
- Five product design labs

# CA World '17: You have a goal. We'll show you the way.

## #NOBARRIERS

Program guides for CA PPM og Agile Central

<https://www.ca.com/content/dam/ca/us/files/caworld/caw17-program-guide-agile-management-ca-project-portfolio-management.pdf>

<https://www.ca.com/content/dam/ca/us/files/caworld/caw17-program-guide-agile-management-ca-agile-central.pdf>

CA World 2017 – Official site

Discover how to remove the barriers between your ideas and business outcomes.

<https://www.ca.com/us/caworld.html>



Thank You