



CA PPM

Product Roadmap

CA Project & Portfolio Management

AUGUST 2018



Disclaimer

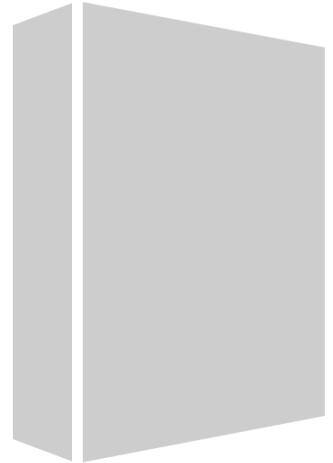
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Customer Innovation Process



Customer Engagement



Customer Innovation Panel:

- New model for customers and product mgt to engage on a monthly basis.
- Customers pitch ideas to each other and gain collective consensus and priority



Customer Release Previews

- Product Mgt covers all functionality delivered in the quarterly release.
- Scheduled in the last half of the release cycle.
- Forum for customers to keep up-to-date on the value delivered each quarter



Customer Validation Sprints

- Customers validate the value of new features at the end each release in one week sprints
- Participating customers commit to upgrade to the validated release immediately
- Customers in the validation sprint have priority to participate in the **Customer Upgrade Program**.



Design & UX Modeling Participation

- Candidates from the **Customer Innovation Panel** - design & UX modeling sessions

CA PPM Customer Innovation Panel

- New process introduced to address suggestions regarding the handling of ideas on the Communities Idea site.
- There is a new idea site at <https://cappm.brightidea.com>.
- Access to this new idea site is only available to [official voting representatives](#).
- Each customer organization is limited to [one](#) voting representative [per CA PPM production instance](#).
- A one-hour review call is held each month (on the [3rd Tuesday at 11:00a ET](#)) to provide product management updates, give an opportunity to pitch new ideas, and highlight ideas that were previously selected.
- Representatives are welcome to submit new ideas.
 - To make them available for voting, however, they (or a proxy) must pitch them on the monthly call.
- To nominate your organization's representative, please provide their name and e-mail address to cappm@ca.com with the subject "CA PPM Customer Innovation Panel"

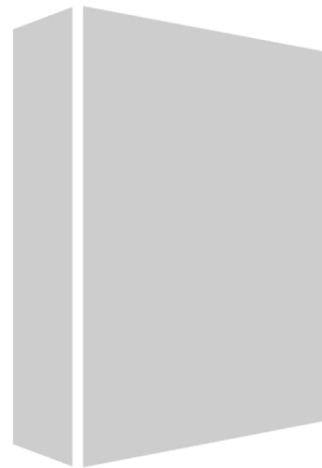
CA PPM Customer Release Previews

- CA invests a considerable amount in organic development to improve CA PPM.
- Previews provide a way to keep up-to-date on the value being delivered as part of your CA PPM investment.
- Delivered quarterly in keeping with our quarterly development cadence.
- 60-90 minute demonstration of new features & enhancements held prior to public release.
- Held at 11:00a ET to accommodate the widest possible audience (EMEA, NA (East & West), LATAM)
 - Recordings are made available for customers in APJ
- Format allows customers to ask questions and either get answers verbally or via chat.
- Access restricted to customers that have signed CA's NDA for participation in pre-release activities.
- To get on the distribution list for release preview invitations, go to <http://validate.ca.com/key/LuncefordMorton>.

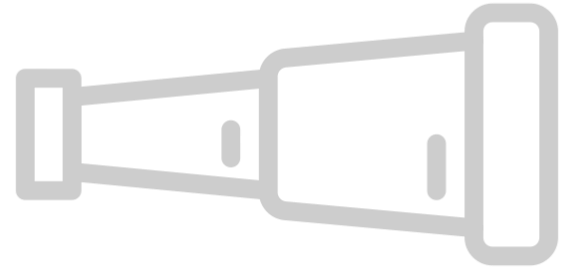
CA PPM Customer Validation Sprints

- Virtual customer validation teams.
- Certain features will be made available for non-production use to selected customers for the purpose of validating the value that the feature can deliver.
- Conducted in one week “sprints” immediately following GA.
- Organizations must meet the following criteria:
 - Must have a participant available for 8-10 hours during a one week “sprint”
 - Must be committed to upgrading to the new version in Production within 90 days after the GA date
- Preference is given to customers that are currently on the GA release.
- Customers participating in the validation sprints are also given priority in the customer upgrade program.
- To be considered for participation, please send your name, organization, and contact information (phone & e-mail) to cappm@ca.com with the subject “CA PPM Customer Validation”.

Product Update



15.5 – Sept '18



15.5 & 15.5.1 – Laying the “Studio” Foundation

- ✓ Foundation is being set to enable rapid deployment and powerful studio capabilities:
- ✓ Configurable Objects
- ✓ Configurable Sub-Objects
- ✓ Common Grid, Board and Filter components
- ✓ Mobile Framework



Introducing...Teams!

CA PPM

Business Transformation Team

←

Search...

TEAM NAME *

Business Transformation Team

TEAM ID

TM00001

Active

Resource	Allocation	Primary Role	Resource Manager	Employment Type	Active
Adriana Ramos	50.00%	Architect	Rosie Miller	Employee	✓
Alex Garcia	30.00%	Network Engineer	Rosie Miller	Employee	✓
Alex Riviera	20.00%	Project Manager	Rosie Miller	Employee	✓
Alicia Gaurand	50.00%	Test Engineer	Rosie Miller	Employee	✓
Art Kingsley	100.00%	Architect	Arun Kumar	Contractor	✓
Arun Krishna	100.00%	Test Engineer	Rosie Miller	Employee	✓
Arun Kumar	100.00%	Business Analyst	Arun Kumar	Contractor	✓
Ashley Parker	100.00%	Business Analyst	Rosie Miller	Employee	✓
Barb Hudson	100.00%	Project Manager	Derrick Joseph	Employee	✓
Beth Roberts	100.00%	Business Analyst	Rosie Miller	Employee	✓
Blair Ives	100.00%	DBA	Rosie Miller	Employee	✓
Bruce Turner	100.00%	Test Engineer	Rosie Miller	Employee	✓
Carlos Perez	100.00%	Project Manager	Rosie Miller	Employee	✓

Simplify



Simplify Resource Planning. Improve support for Agile. Support Modern and simpler ways of working

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Teams – end to end workflow

Automated Security Enhancements

Staff	Staff Type	Project Role	Booking Status	Open for Time Entry	Start	Finish	Allocat...	Actuals
Robert Jones	Resource	Developer	Soft	<input checked="" type="checkbox"/>	02/01/18	12/31/18	400	40
Bill Smith	Resource	Software Engineer	Hard	<input type="checkbox"/>	02/01/18	12/31/18	400	40
Mary Smith	Resource	Developer	Hard	<input type="checkbox"/>	02/01/18	12/31/18	400	40
Robotics	Team				02/01/18	12/31/18	2000	160
Architect	Role	Architect			02/01/18	12/31/18	400	
Architect (2)	Role	Architect			06/01/18	09/30/18	400	

Project allocation –
Resources, Roles or Teams

Automated Security Enhancements

REPLACE

Resources	Role	Team	Allocat...	Actuals	ETC
Architect	Role	Architect	02/01/18	12/31/18	400
Architect (2)	Role	Architect	06/01/18	09/30/18	400

Replace - Resource,
Role or Teams

Automated Security Enhancements

Task	Resource	Role	Team
Task 1	Resource	Role	Team
Task 2	Resource	Role	Team

Task assignment -
Resources, Roles or Teams

Alphabet Soup

Input Type Code	Charge Code	Mon 28	Tue 29	Wed 30	Thu 31	Fri 1	Sat 2	Sun 3
Functional and Technical Design (Design Phase)	010000							
Identify Infrastructure Requirements (Planning Phase)	010000							
User Interface Development (Construction Phase)	010000							
Risk Response and Mitigation Plan (Planning Phase)	010000							

Team time capture
- Resources or
Teams

Automated Security Enhancements

Input Type	Location	Resource C...	Resource	Role	Team	2018-06 PLANNED	2018-07 PLANNED	2018-08 PLANNED	2018-09 PLANNED	TOTALS PLANNED
Billable	New York	Internal Labor	Alphabet Soup	Team	Internal Labor	135,200	176,720	284,400	12,800	609,120
Billable	New York	Internal Labor	Erin Gillian	Developer	Internal Labor	0	0	19,840	8,320	28,160
Billable	New York	Internal Labor	Jason Berry	Developer	Internal Labor	0	0	19,840	8,320	28,160
Billable	New York	Internal Labor	Jason Sauer	Network Eng...	Internal Labor	0	0	19,840	8,320	28,160
Billable	New York	Onshore	Mark Goldman	Business Ana...	Internal Labor	20,480	6,400	0	0	26,880
Billable	New York	Onshore	Mary Newburg	Storage Archi...	External Labor	6,400	21,000	0	0	27,400
Billable	New York	Internal Labor	Valerie Childs...	Architect	Internal Labor	19,200	6,000	0	0	25,200

Cost Plans –
include
Resources,
Roles or Teams

Power



Teams – Define > Allocate > Assign > Plan > Execute

Roadmap Grids: Sort & Saved Views

CA PPM 2019 IT Plan

VIEW: Planned costs

In Plan	Rank	Roadmap Item	Capit... 1 ↓	Capac... 2 ↑	Opera... 3 ↑	Benefit 4 ↑	Total Cost
<input checked="" type="checkbox"/>	6	Compliance	3,000,000				
<input checked="" type="checkbox"/>	5	Client Portals	3,000,000				
<input checked="" type="checkbox"/>	1	Data Analysis	1,750,000				
<input checked="" type="checkbox"/>	8	One Click Ord...	1,500,000				

In Plan	Rank	Roadmap Item*	Capit... 1 ↓
<input checked="" type="checkbox"/>	6	Compliance	3,000,000
<input checked="" type="checkbox"/>	5	Client Portals	3,000,000
<input checked="" type="checkbox"/>	1	Data Analysis	1,750,000
<input checked="" type="checkbox"/>	8	One Click Ordering	1,500,000

- ✓ Additional excel like capabilities
- ✓ Sort up to 4 columns simultaneously
- ✓ Column width changes saved with views and preferences

Power



Refine your data with multi-level column sorting capabilities

Roadmap Grids – fiscal period information

FORWARD INC. FY18 Roadmap

SCENARIO Baseline Search or filter...

VIEW Exec. Summary

In Plan	Rank	Roadmap Item	Start	Finish	ROI	Totals			Mar-19		Apr-19		May-19
						Operating Cost	Capacity		Operating Cost	Capacity	Operating Cost	Capacity	Operating Cost
<input checked="" type="checkbox"/>	1	Analytics App	04/02/2019	05/31/2019	900%	600,000	3				300,000	1.5	
<input checked="" type="checkbox"/>	2	Authentication	01/01/2019	03/31/2019	93%	1,500,000	4		500,000	1.3			
<input checked="" type="checkbox"/>	3	Chat Version 2	05/01/2019	07/31/2019	38%	326,000	6						
<input checked="" type="checkbox"/>	4	Co-op Capital Planning	03/01/2019	05/31/2019	0%	3,000,000	20		1,000,000	6.7	1,000,000	6.7	
<input checked="" type="checkbox"/>	5	Cyber Threat Resilience	08/01/2019	10/31/2019	0%	2,450,000	16						
<input checked="" type="checkbox"/>	6	Data Analysis	01/01/2019	03/31/2019	63%	550,000	2		183,333	0.7			
<input checked="" type="checkbox"/>	8	Digital Branch System	10/20/2019	12/31/2019	471%	1,750,000	30						
<input checked="" type="checkbox"/>	9	Market Launch	11/15/2019	03/31/2020	328%	1,750,000	20						
<input checked="" type="checkbox"/>	10	Media Player	01/01/2019	04/20/2019	75%	2,000,000	8		500,000	2.0	500,000	2.0	
<input checked="" type="checkbox"/>	11	Micro Lending Site	03/25/2019	06/20/2019	249%	1,750,000	20				583,333	6.7	
<input type="checkbox"/>	7	Data Warehouse	04/02/2019	11/15/2019	72%	550,000	2				68,750	0.3	
<input type="checkbox"/>	12	One Click Ordering	01/01/2019	03/31/2019	33%	750,000	4		250,000	1.3			
<input type="checkbox"/>	13	Peer to Peer Payments	10/01/2019	11/30/2019	540%	125,000	25						
<input type="checkbox"/>	14	Regulatory Enhancements	02/01/2019	05/31/2019	0%	3,000,000	50		750,000	12.5	750,000	12.5	
<input type="checkbox"/>	15	Rolling Mobile ATM	06/02/2019	09/30/2019	200%	1,500,000	40						
<input type="checkbox"/>	16	Enterprise Search and Chat	05/01/2019	10/31/2019	0%	4,000,000	16						
<input type="checkbox"/>	17	Security and Performance	04/01/2019	11/30/2019	0%	2,250,000	6				281,250	0.8	
<input type="checkbox"/>	18	User Transformation	06/01/2019	09/25/2019	0%	1,500,000	25						
<input type="checkbox"/>	19	LATAM Digital Transformation	02/15/2019	07/31/2019	42%	350,000	35		58,333	5.8	58,333	5.8	
<input type="checkbox"/>	20	Predictive Analytics Platform v2	02/22/2019	07/15/2019	60%	1,000,000	50		166,667	8.3	166,667	8.3	
<input type="checkbox"/>	21	Mobile Cash Application	02/01/2019	03/22/2019	0%	600,000	50		300,000	25.0			
<input type="checkbox"/>	22	BI Analytics	05/22/2019	11/22/2019	1450%	850,000	85						
<input type="checkbox"/>		New Mobile Portal	01/23/2019	04/22/2019	25%	650,000	25		216,667	8.3	216,667	8.3	

Simplify



Simplify investment planning. Support modern and simpler ways of working

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Custom investment types in the modern UX

The screenshot displays a software interface for managing investments. On the left is a dark sidebar with icons for navigation and analytics. The main header area shows 'CA PPM' and four large, empty boxes representing custom investment types: 'Business Case', 'Corporate Merger', 'Marketing Plan', and 'Program Increment'. Below this is a table with 11 columns: Name*, Investment ID*, Manager, Progress, Stage, Architectural Fit, Business Alignment, Business Unit Priority, Charge Code, Corporate Priority, and Description. The table contains two rows of data.

Name*	Investment ID*	Manager	Progress	Stage	Architectural Fit	Business Alignment	Business Unit Priority	Charge Code	Corporate Priority	Description
A second Business Case	11	Administrator, CA PPM	Started	Business Case		75	Very High		High	This is a really good idea
My Business Case	12	Administrator, CA PPM	Started	Business Case		83	Very High		High	This is an important Business Case

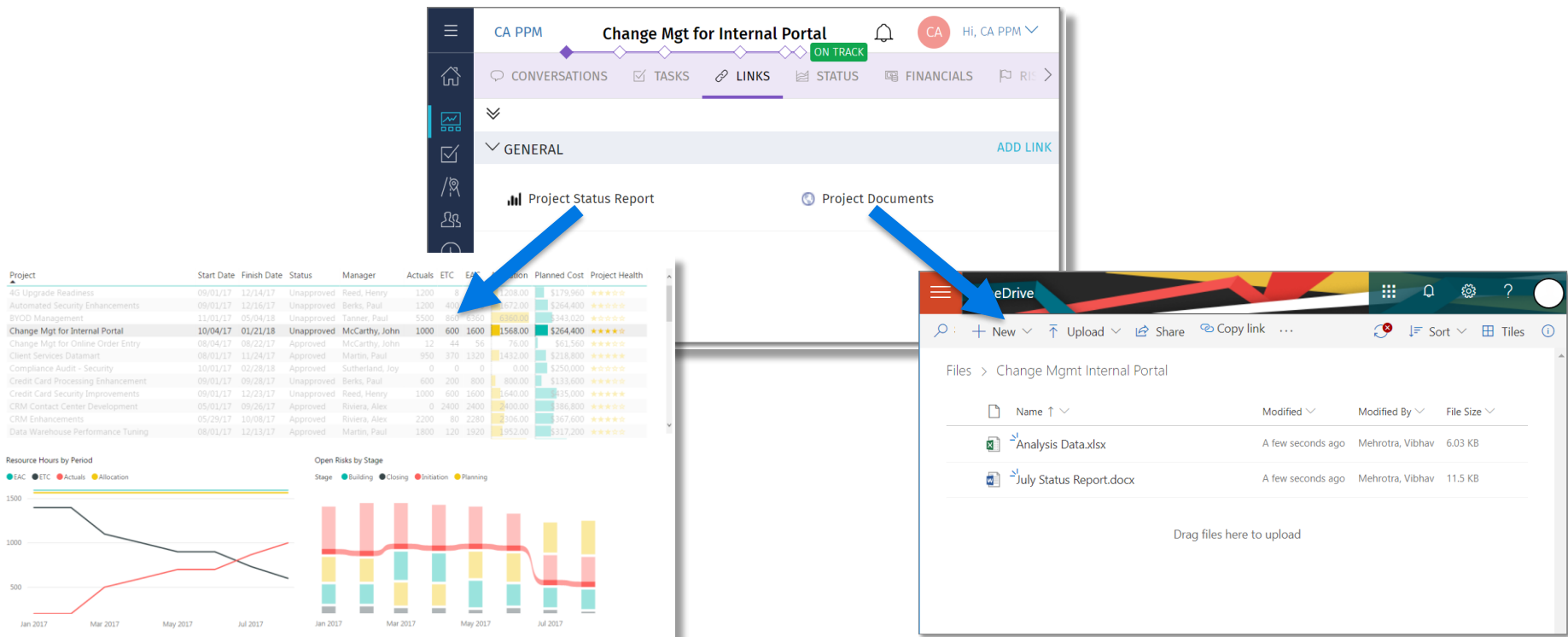
- ✓ The ability to create your own Types and Rename your investment types
- ✓ Blueprint to configure exactly what you need
- ✓ Add Tasks to Investments – multiple tracking activities

Usable Unique



Why call your work what we name it? Why do you need to train people on a new vocabulary?

Context sensitive project links



Flexibility

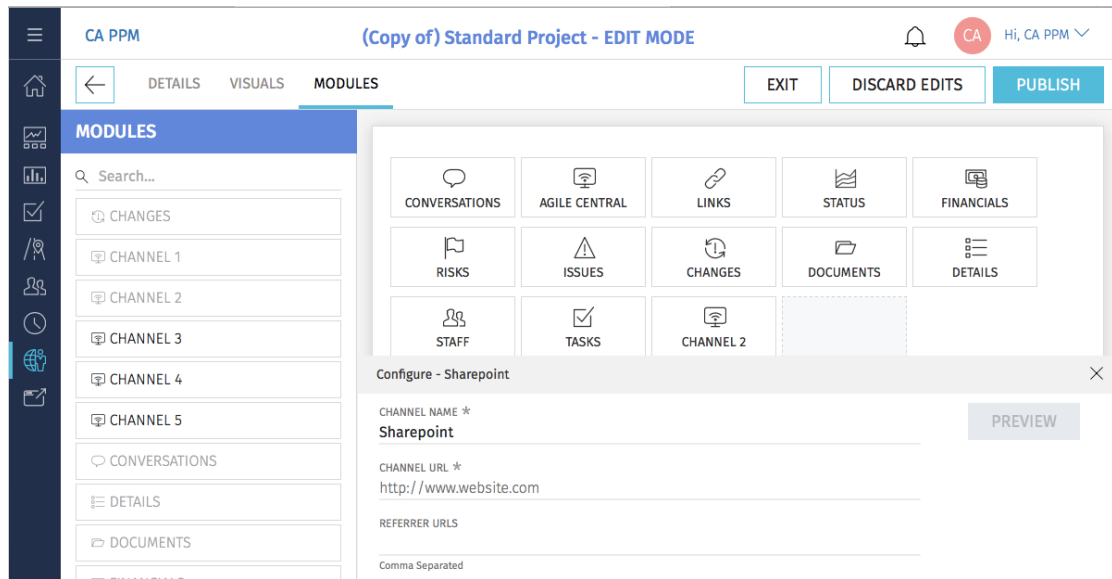


Link Projects to your BI reports or document management system passing project specific information.

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Project channels – window to the world of data

- ✓ Configurable modules which render an external application within CA PPM
- ✓ Remain in the context of the project when accessing external information



Flexibility

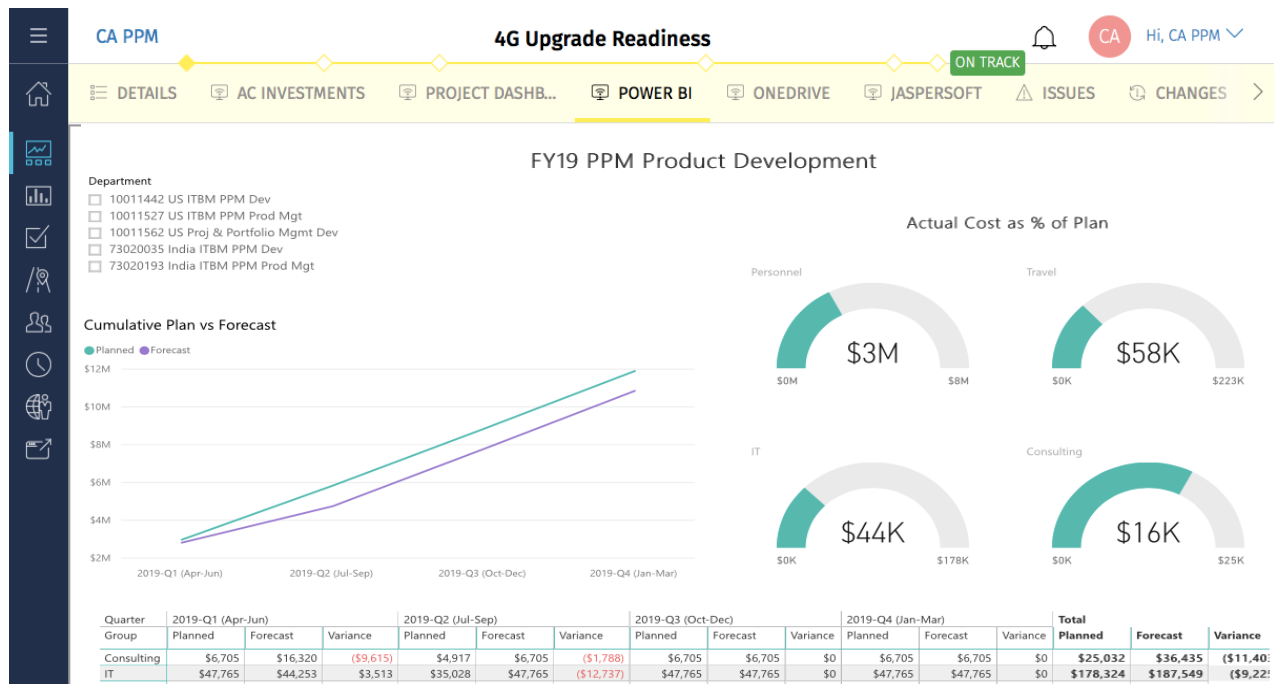


Obtain business decision making information in one place.

Project channels – window to the world of data

✓ Custom channels – bring everything together in one workspace:

- ✓ • Power BI
- Agile Central
- One Drive
- Classic Dashboard



One
Workspace



Everything the team needs is in one solution. Channels and Links bring it all together.

Project channels – window to the world of data

CA PPM

4G Upgrade Readiness

ON TRACK

DETAILS AC INVESTMENTS PROJECT DASHB... POWER BI ONEDRIVE JASPER SOFTWARE ISSUES CHANGES

PROJECTS ... Acme Corporation

Total Work Items: 130

ID	NAME	START DATE	END DATE	PERCENT DONE BY STORY PLAN ESTIMATE	PERCENT DONE BY WORKDAYS	PERCENT DONE BY SCHEDULE
IV3	New Application UI	11/15/2017 01:30 ...	03/01/2018 01:29 ...	21%	100%	13%
IV7	QA Testing FI Creation	03/01/2018 01:30 ...	04/01/2018 12:29 ...	50%	100%	0%
IV4	Funding Increment ABCD	02/02/2018 01:30 ...	04/04/2018 12:29 ...	10%	100%	50%
IV6	PPM Created A	02/15/2018 01:30 ...	04/16/2018 12:29 ...	0%	100%	0%
IV10	QA Testing FI Creation	05/03/2018 12:30 ...	05/17/2018 12:29 ...	0%	100%	0%
IV9	QA Testing FI Creation	05/01/2018 12:30 ...	06/01/2018 12:29 ...	0%	100%	0%
IV11	New trending	05/01/2018 12:30 ...	06/01/2018 12:29 ...	0%	100%	0%
IV85	DC04 job	06/20/2018 12:30 ...	06/30/2018 12:29 ...	0%	100%	0%

CA PPM

Aardvarck Rehab

TASKS LINKS STAFF CONVERSATIONS FINANCIALS BENEFIT PLANS APPROVAL PRO...

CA PPM

HOME ADMINISTRATION FAVORITES

Process: Create Major Project | Object: Aardvarck Rehab - Initiated Process Flow Diagram

```
graph LR; Start((Start)) --> CreatePlan[Create Project Plan]; CreatePlan --> SetFields[Set Financial Fields]; SetFields --> RunRules[Run Estimating Rules]; RunRules --> SetTemplate[Set Project Template]; SetTemplate --> BaselineProject[Baseline Project];
```

Return

One
Workspace



Everything the team needs is in one solution. Channels and Links bring it all together.

Other Project Improvements



Simplify project setup with Copy To Do's and Links from Project Template



Support for 'Fixed Work' task types - MSP integration

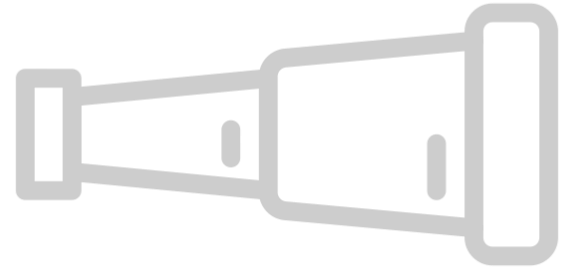
Simplify

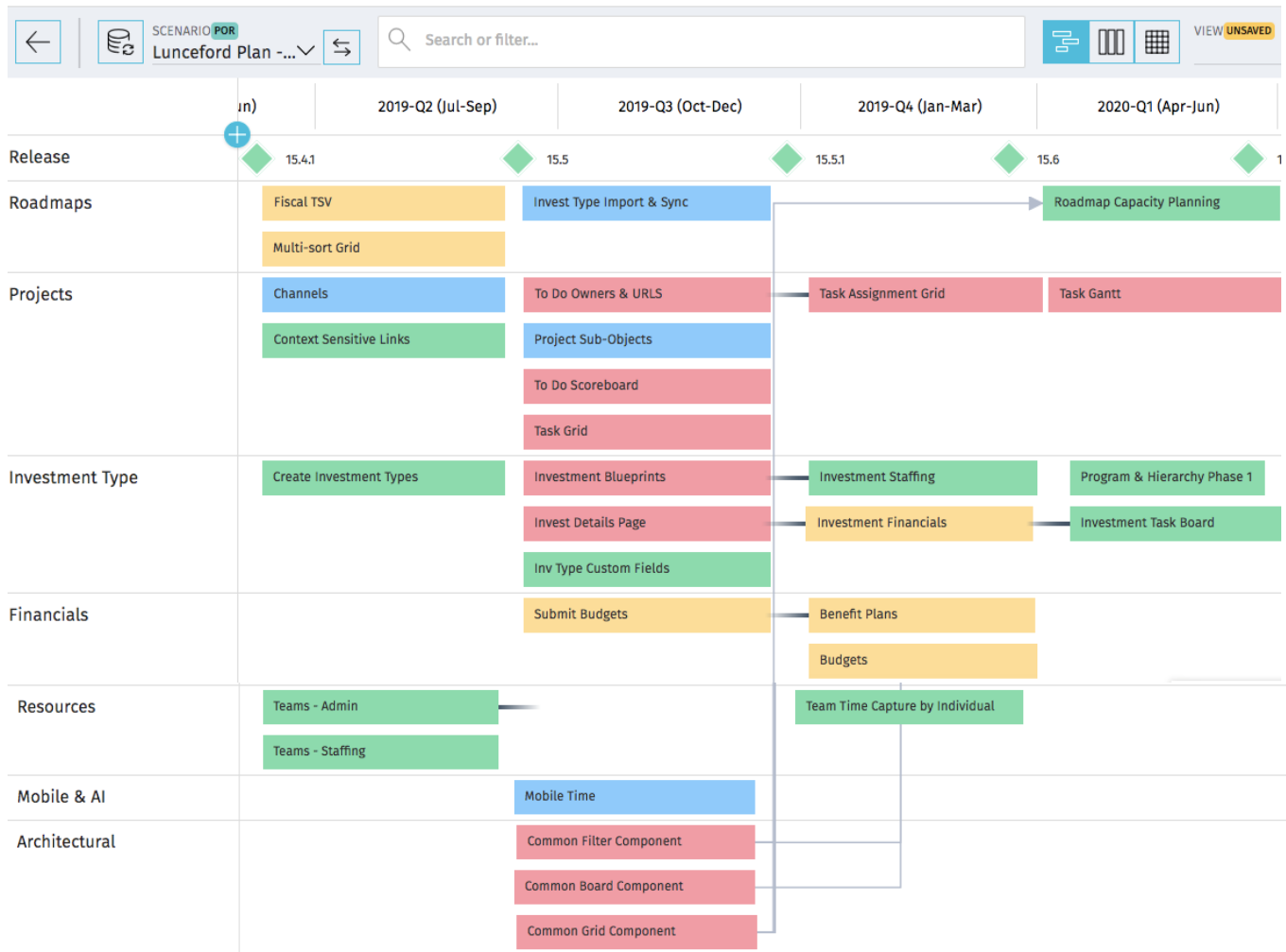


Simplify project management

Under Development

15.5.1





Reimagining Studio – Configurable Grid

CA PPM

Column Sizing & Pinning

Work Investment Roadmap

SCENARIO **POR** Plan of Record

VIEW **UNSAVED** 4 Column Sort - C...

Right-click add/delete

Multi-sort

Configurable Columns

In Plan		Roadmap Item* 4 ↑	Sponsor 1 ↑	Start	Finish 3 ↑	ROI 2 ↓	Totals
						Total Cost	Capacity
<input type="checkbox"/>		CRM Enhancements	Amos, Cheryl	Mar 21 2018	May 30 2018	550%	592,400
<input type="checkbox"/>		Mobile Advertising	Amos, Cheryl	Mar 09 2018	Sep 25 2018	143%	420,800
<input checked="" type="checkbox"/>		Eclipse Enhancements	Amos, Cheryl	Apr 09 2018	Aug 17 2018	68%	438,000
<input checked="" type="checkbox"/>		Import LinkedIn Profile	Lewis, Dana	May 01 2018	Oct 02 2018	(1%)	292,703
<input type="checkbox"/>		Mobile Commerce	Lewis, Dana	Mar 19 2018	Jun 06 2018	636%	169,920
<input checked="" type="checkbox"/>		Pay by Phone	Lewis, Dana	Aug 07 2018	Sep 28 2018	83%	275,920
<input type="checkbox"/>		eBusiness Mobile Network	Lewis, Dana	Feb 20 2018	Sep 28 2018	25%	900,000
<input checked="" type="checkbox"/>		eCommerce Portal	Lewis, Dana	Feb 06 2018	Jul 03 2018	21%	689,400
<input checked="" type="checkbox"/>		Order Suggestions	Lewis, Dana	Apr 09 2018	Jan 19 2019	20%	461,929
<input checked="" type="checkbox"/>		Social Networking Security Upgrade	Martin, Paul	Jan 15 2018	Apr 18 2018	1,000%	444,360
<input checked="" type="checkbox"/>		BI Analytics	Martin, Paul	Sep 07 2018	Dec 07 2018	77%	250,640
<input checked="" type="checkbox"/>		Data Warehouse Performance Tuning	Martin, Paul	Jul 09 2018	Oct 26 2018	41%	348,200
<input checked="" type="checkbox"/>		Executive Dashboard Visibility	Martin, Paul	Jun 05 2018	Oct 18 2018	30%	264,400
<input type="checkbox"/>		Build read-write API for handling Orders					

1- 22 of 22 FIRST PREVIOUS NEXT LAST

☒ In Plan
☒ Rank
☒ Roadmap Item*
☒ Linked To
☒ Must Have
☒ Sponsor
☒ Start
☒ Finish
☒ ROI
☒ Totals
☒ Total Cost
☒ Capacity
☒ Benefit
☒ Capital Cost
☐ Actual
☐ Actual Capital Cost
☐ Actual Operating ...
☐ Operating Cost
☐ Remaining Capac...
☐ Remaining Capit...
☐ Remaining Opera...
☐ Total Actual Cost
☐ Total Remaining ...

Text wrapping for large text fields

Reimagining Studio— Configurable Board

CA PPM

FY18 Plan Advanced Technologies BU

Hi, Ian

SCENARIO **POR**
Plan of Record

Search or filter...

VIEW **UNSAVED**
Search...

Configurable Columns

Pending Approval

- Market Launch
DEC 9 | MUST HAVE
- Peer to Peer Payments
DEC 21 | MUST HAVE
- Digital Branch System
FEB 1
- Data Warehouse
OCT 31
- Enterprise Search and Chat

Approved

- User Transformation
AUG 10 | MUST HAVE
- Co-OpCapital Planning
SEP 30 | MUST HAVE
- Mobile BI Anywhere
SEP 27 | MUST HAVE
- Cyber Threat Resilience
OCT 25 | MUST HAVE

On Hold

- Mobile Cash Application
JUL 24 | MUST HAVE
- Rolling Mobile ATM
APR 29 | MUST HAVE
- Predictive Analytics Platform V2
JUL 21 | MUST HAVE
- Authentication
MAY 31 | MUST HAVE
- FedRamp Compliance

Columns *

Status

COLOR BY

Spend Category

MANAGE NEW PICKLIST

-- None --

This Room

Spend Category

Stakeholder

User-Definable Picklists

In Plan

Outcome

Overall Risk

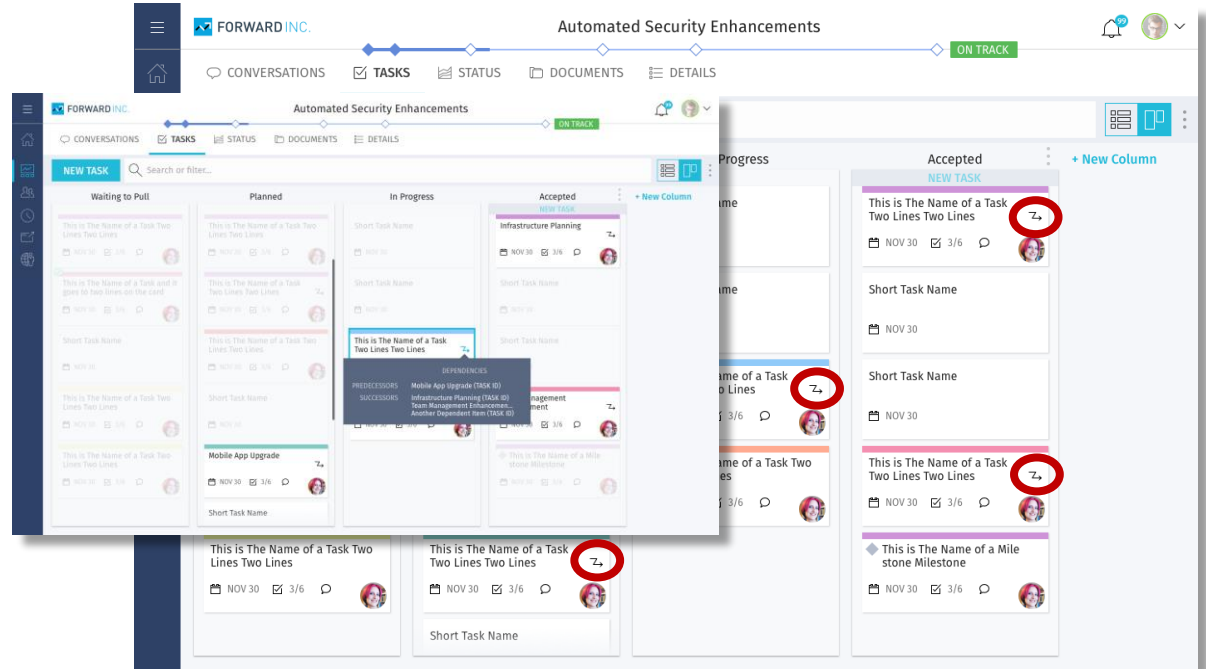
Configurable Colors

Grow Transform

Show / Hide Columns

Task board improvements for the PM

- ✓ Create dependencies between Task cards
- ✓ Multi-select Task cards & move
- ✓ Hide / show columns



Reimagining Studio – Configurable Filters & Views

The screenshot displays the FORWARD INC. FY18 Roadmap interface. At the top, the title 'FY18 Roadmap' is centered. Below it, a navigation bar includes a 'SCENARIO' dropdown set to 'Scenario 1', a search bar, and a 'VIEW' dropdown set to 'Exec. Summary'. To the right of the search bar, there are icons for filters (2), a funnel, a list, a grid, and a settings gear. A large grey arrow labeled 'Configurable Filters' points to the filter section, which contains two dropdown menus: 'TYPE' and 'IN PLAN', both with 'Select Value' as the current selection. To the right of these is a 'CLEAR FILTERS' button. Below the navigation bar is a table with the following columns: In Plan, Rank, Roadmap Item, Owner, Start, Finish, Link, Link ID, Sync, and Last Synced. The table contains two rows of data. A large grey arrow labeled 'Saved Views' points to the 'VIEW' dropdown menu.

FORWARD INC. FY18 Roadmap

SCENARIO: Scenario 1 | Search... | VIEW: Exec. Summary

Configurable Filters:

- TYPE: Select Value
- IN PLAN: Select Value
- CLEAR FILTERS

In Plan	Rank	Roadmap Item	Owner	Start	Finish	Link	Link ID	Sync	Last Synced
<input checked="" type="checkbox"/>	4	Analytics Portal	Evan Lastname	04/01/17	06/01/17	Project Name	PR12930	<input checked="" type="checkbox"/>	2/1/2018 12:00
<input checked="" type="checkbox"/>	8	Authentication	Denice Lastname	01/01/17	03/01/17	Project Name	PR1024	<input checked="" type="checkbox"/>	2/1/2018 12:00

Saved Views:

Project sub-objects are coming to the modern UX

CA PPM Aardvarck Rehab ON TRACK

TASKS LINKS STAFF CONVERSATIONS FINANCIALS RISKS ISSUES CHANGES DETAILS STATUS DOCUMENTS AGILE CENTRAL

	Name* ↑	Priority*	Status*	Description	Assigned To*	Expected Closure Date	Last Updated Date	Category
+	Status Report	Low	Open	Descriptive Text with wrapping Descriptive Text with wrap... Descriptive Text with wrapping Descriptive Text with wrapping Descriptive Text with wrapping Descriptive Text with wrapping	Administrator, System	Aug 29 2018	Aug 29 2018	

- ☒ Conversation
- ☒ Name*
- ☒ Priority*
- ☒ Status*
- ☒ Description
- ☒ Assigned To*
- ☒ Expected Closure Date
- ☒ Last Updated Date
- ☒ Category Type
- ☒ Reasons
- ☒ Review Date
- ☐ Approved By
- ☐ Approved Date
- ☐ Assessment Date
- ☐ Assessor

☒ Custom Project Sub-Objects available in Blueprints and as a page in the new UX

Configure



Update Project Sub-Objects in the modern UX

Configurable Task Grid

✓ Configurable Project Task grid

✓ Display / edit custom Task attributes

The screenshot displays the Eclipse Enhancements CA PPM interface. At the top, there's a navigation bar with tabs for TASKS, LINKS, STAFF, FINANCIALS, CONVERSATIONS, RISKS, ISSUES, CHANGES, DETAILS, STATUS, and DOCUMENTS. A 'NEW TASK' button and a search bar are also present. Below the navigation bar, the 'CA PPM' section is active, showing a search bar for 'Dana Lewis'. The main area contains a table of tasks with columns for Name, Team Member, Start, Finish, Status, and % Complete. The table lists various tasks such as 'Risk Response and Mitigation Plan', 'Prepare cost benefit analysis', 'Define Scope Change and Control Process', 'Requirements Definition', 'Define Resource Plan', 'Personnel', 'Complete Project Plan', 'Promotional give-aways', 'Requirements Definition', 'Complete Project Plan', 'Functional and Technical Design', 'Booth inspection', 'Follow up letters mailed', 'BUT Executive Project', 'User Interface Development', 'Complete Project Plan', 'Risk Response and Mitigation Plan', 'Requirements Definition', 'Usability and User Acceptance Testing', and 'Lessons Learned'. Each task is assigned to one or more team members. The table also includes a 'Status' column with icons and a '% Complete' column with progress bars. On the right side, there's a sidebar with a list of custom task attributes that can be configured, including Conversation, Project Name, Name, Team Member, Start, Finish, Status, % Complete, % Done By Agile Plan, % Done By Story Count, Accepted Story Points, Accepted User Stories, Actuals, Agile Actual Finish, Agile Actual Start, Agile Investment Category, Agile Iteration, Agile Milestones, Agile Plan Estimate, Agile Planned Finish, Agile Planned Start, Agile Preliminary Estima, Agile Release, Agile Risk Score, Agile State, Agile Status, Agile Value Score, Charge Code, Cost Variance %, Estimated Story Points, and Estimated User Stories.

	Name*	Team Member	Start*	Finish* ↑	Status	% Complete	
🔍	Risk Response and Mitigation Plan	Dana Lewis, Carlos Perez	Apr 19 2018	May 10 2018	🔍	0%	
🔍	Prepare cost benefit analysis	Dana Lewis	May 21 2018	May 25 2018	🔍	99%	
🔍	Prepare cost benefit analysis	Dana Lewis	May 28 2018	Jun 01 2018	🔍	99%	
🔍	Define Scope Change and Control Process	Dana Lewis	May 18 2018	Jun 08 2018	🔍	0%	
🔍	Requirements Definition	Dana Lewis	May 14 2018	Jun 08 2018	🔍	0%	
🔍	Define Resource Plan	Barb Hudson, Dana Lewis, Peter Phillips	Jun 01 2018	Jun 22 2018	🔍	0%	
🔍	Personnel	Leigh Clark, Dana Lewis, Mark Montoya, Nick O'Malley	May 29 2018	Jun 22 2018	🔍	10%	
🔍	Complete Project Plan	Dana Lewis, Peter Phillips	Jun 25 2018	Jun 27 2018	🔍	0%	
🔍	Risk Response and Mitigation Plan	Barb Hudson, Dana Lewis, Peter Phillips	Jun 01 2018	Jul 02 2018	🔍	0%	
🔍	Promotional give-aways	Karl Abbott, Dana Lewis, Nick O'Malley, Sam Rubio, Sara Sumner	May 29 2018	Jul 06 2018	🔍	5%	
🔍	Requirements Definition	Dana Lewis, Peter Phillips	Jun 25 2018	Jul 12 2018	🔍	0%	
🔍	Complete Project Plan	Karl Abbott, Leigh Clark, Sage Copeland, Tanner Grant, Dana Lewis, Sam Rubio, Rory Walker	Jun 04 2018	Jul 13 2018	🔍	0%	
🔍	Functional and Technical Design	Art Kingsley, Dana Lewis, Veronica Miller	Jun 11 2018	Jul 23 2018	🔍	0%	
🔍	Booth inspection	Dana Lewis, Mark Montoya, Nick O'Malley, Sam Rubio	Jun 26 2018	Jul 26 2018	🔍	0%	
🔍	Follow up letters mailed	Dana Lewis, Nick O'Malley, Sam Rubio	Jul 03 2018	Aug 13 2018	🔍	0%	
🔍	BUT Executive Project	Rita Lee, Dana Lewis, Paul Martin, Peter Thompson	May 04 2018	Aug 31 2018	🔍	0%	
🔍	User Interface Development	Art Kingsley, Dana Lewis, Carolyn Murphy	Aug 10 2018	Sep 12 2018	🔍	0%	
🔍	Complete Project Plan	Dana Lewis, Tom Morris, Joy Sutherland	Nov 12 2018	Nov 23 2018	🔍	0%	
🔍	Risk Response and Mitigation Plan	Dana Lewis, Tom Morris	Nov 29 2018	Jan 09 2019	🔍	0%	
🔍	Requirements Definition	Joyce Bauer, Rakesh Bhatt, Dana Lewis, Tom Morris, Sanjay Patel	Dec 24 2018	Jan 11 2019	🔍	0%	
🔍	Usability and User Acceptance Testing	Dana Lewis, Erin Moreau	Jan 21 2019	Mar 15 2019	🔍	0%	
🔍	Usability and User Acceptance Testing	Dana Lewis, Joy Sutherland	Feb 19 2019	Apr 02 2019	🔍	0%	
🔍	Lessons Learned	Dana Lewis, Joy Sutherland	Apr 02 2019	Apr 09 2019	🔍	0%	

1- 23 of 23 FIRST PREVIOUS NEXT LAST

Configure



Project Task grid view – Display and edit custom Task attributes

Boards & Grids – where does this go?

✓ Object menus – grid view & board view

✓ TSV's in the grid

✓ Custom & shared picklists

✓ Saved and Shared views

✓ Custom Objects and Sub-objects

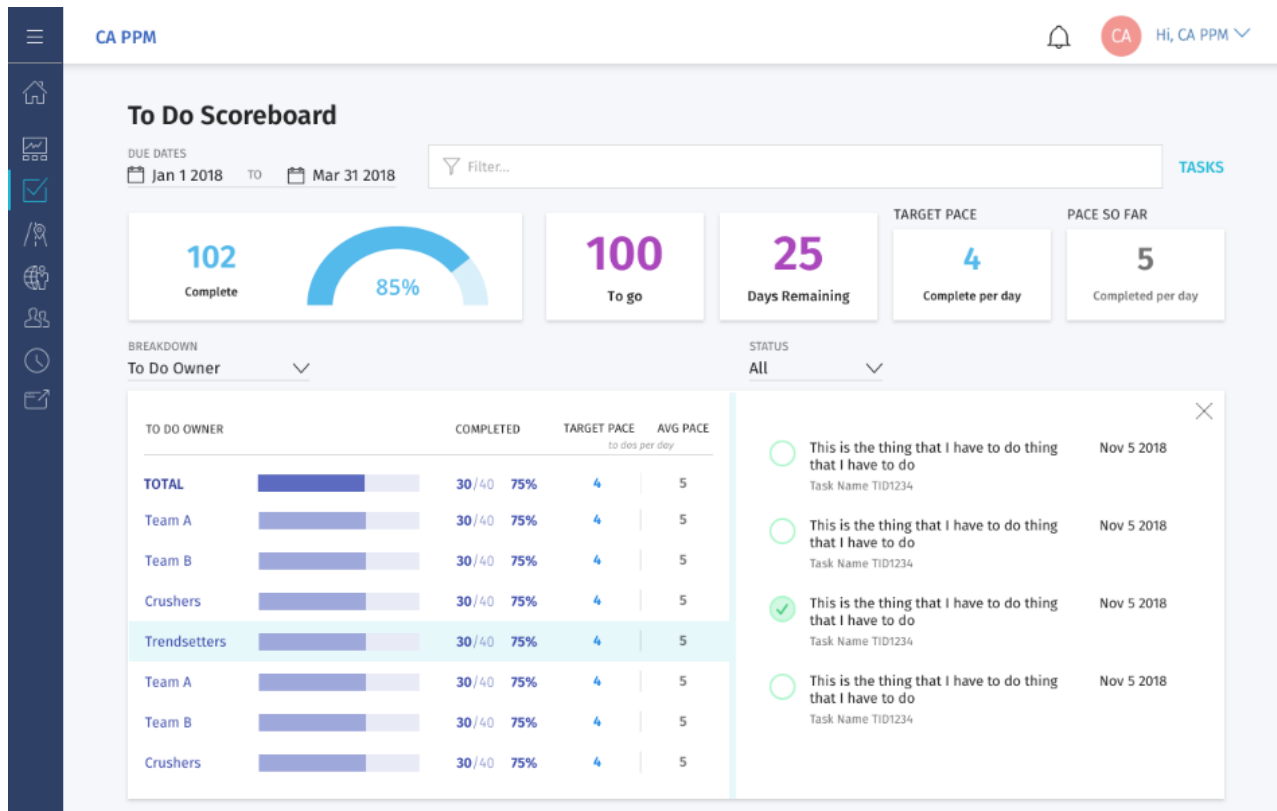
The screenshot displays the CA PPM software interface. The top navigation bar includes tabs for TASKS, LINKS, STAFF, CONVERSATIONS, FINANCIALS, BENEFIT PLANS, APPROVAL PRO..., AGILE CENTRAL, RISKS, and STATUS. Below this, a 'NEW TASK' button and a search bar are visible. The main area is divided into several columns representing task stages: Incoming, Waiting to Pull, Planned, In Progress, and Accepted. Each column contains task cards with details like 'Unit and Performance Testing', 'Initiating Process Complete', 'Define Scope Change and Control Process', 'Requirements Definition', and 'Functional and Technical Design'. A sidebar on the left shows a list of tasks with checkboxes and a search bar. The bottom section shows a detailed grid view of tasks with columns for Name, Team Member, Start, Finish, Status, and % Complete. A right-hand sidebar contains a list of picklists for various fields like Conversation, Project Name, Name, Team Member, Start, Finish, Status, etc.

Configure

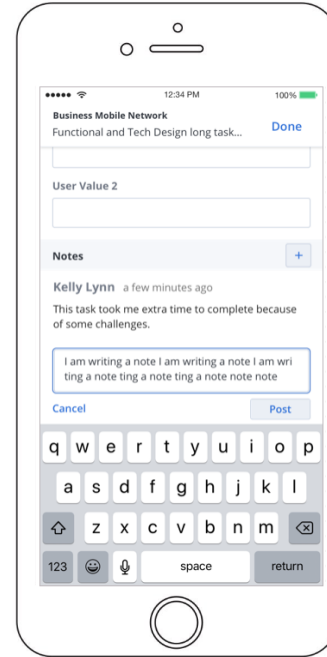
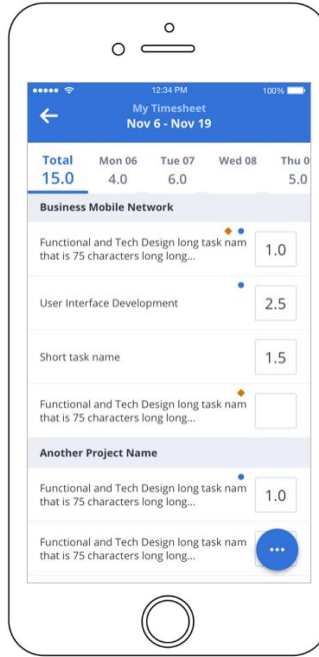
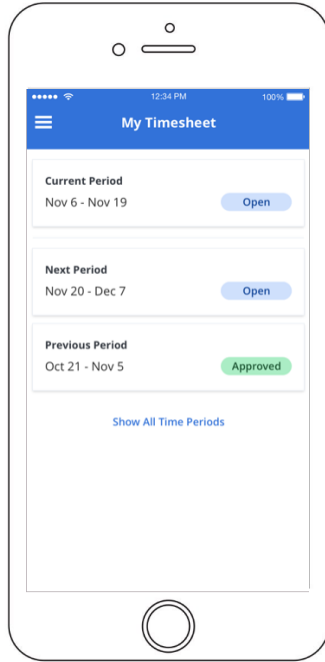


Common components - tremendous power & visibility

To Do Scoreboard



SSO-compatible mobile platform / timesheet



Convenient



Capture time when you want and where you want without the need to authenticate every time..

Investment types – Blueprinting & detail page

- ✓ Easily create new sections and drag fields where you need them
- ✓ Each Investment Type has a unique Blueprint

The screenshot displays the 'Demand - EDIT MODE' interface for an investment type blueprint. The top bar shows 'CA PPM' and 'Demand - EDIT MODE' with an 'EXIT' button. The left sidebar contains a 'FIELDS' panel with a search bar and a list of fields: % COMPLETE, % DONE BY AGILE PLAN ESTIMATE, % DONE BY STORY COUNT, ACCEPTED STORY POINTS, ACCEPTED USER STORIES, ACCOUNT MANAGER, ACTIVE, ACTUALS, AGILE ACTUAL FINISH, AGILE ACTUAL START, AGILE CENTRAL INVESTMENTS, AGILE INVESTMENT CATEGORY, AGILE MILESTONES, AGILE PLANNED FINISH, AGILE PLANNED START, and AGILE PRELIMINARY ESTIMATE. The main area is titled 'DETAILS' and contains several sections: 'START *', 'FINISH *', '% COMPLETE', and 'PROJECT TYPE' at the top; 'DEPARTMENT OBS' and 'OBJECTIVE' below; a 'STAKEHOLDERS' section with 'MANAGER', 'SPONSOR', 'STEERING COMMITTEE', 'PROJECT MANAGEMENT OFFICE', and 'FINANCE AND GOVERNANCE'; a 'LEAN CANVAS' section with 'PROBLEM', 'SOLUTION', 'UNIQUE VALUE PROPOSITION', 'KEY METRICS', and 'COST STRUCTURE'; and 'REVENUE' at the bottom.

Control



Design the Investment Type Details page to suit your organizational needs

Investment Types - Roadmap linking

The screenshot displays the 'Annual Investment Roadmap' in a Power BI environment. The main view shows a timeline of investment projects from 2018-Q1 to 2018-Q4. A modal dialog titled 'IMPORT INVESTMENT TYPES' is open, allowing users to search for and import investment types. The dialog has two search fields: 'INVESTMENT OBS' and 'INVESTMENT TYPES', both with 'Search...' placeholders. Below these fields is a blue button labeled 'IMPORT ITEMS'. The background shows a detailed view of a project, 'CRM Contact Center Development', with a list of investment types linked to it, including 'A ... (P161095)', 'A Finance ... (P161090)', 'A New ... (P161091)', 'A Portfolio ... (P161092)', 'AC Core ... (P161093)', 'AC Safe ... (P161094)', 'Anesthesia ... (P161095)', 'API Technical ... (P161096)', 'Application ... (P161097)', and 'Atropine ... (P161098)'. The project details on the right include 'INVESTMENT ID: IT1148', '% COMPLETE: 0%', 'SPONSOR: Cheryl Amos', and 'SPONSORING COMMITTEE: Matthews, April; Granger, Paula; Patek, Sid; Thompson, Peter'.

- ✓ Link roadmap items to investment types
- ✓ Drill into PPM investment type details
- ✓ Available from roadmap grid, board and timeline views

Power



Determine which PPM investment types are linked to the roadmap

Investment Types - Roadmap syncing

The screenshot displays the FORWARD INC. FY18 Roadmap interface. A table lists various items with columns for In Plan, Item, Owner, Start, and Finish. A context menu is open over the table, showing options: Import from PPM, Import from CSV, Export to CSV, and Sync Linked Items... The 'Sync Linked Items' dialog box is also open, showing a list of linked items and a 'SYNC' button.

In Plan	Item	Owner	Start	Finish
<input checked="" type="checkbox"/>		Evan Lastname	04/01/17	06/01/17
<input checked="" type="checkbox"/>		Denice Lastname	01/01/17	03/01/17
<input checked="" type="checkbox"/>		Mary Lastname	01/01/17	03/30/17
<input checked="" type="checkbox"/>	2 Data warehouse	Kurt	04/30/17	11/30/17
<input checked="" type="checkbox"/>	6 Encryption	Rob	05/30/17	10/01/17
<input checked="" type="checkbox"/>	10 Go to Market	Kelly	11/30/17	12/31/17
<input checked="" type="checkbox"/>	12 Media Rev 2	Brian	02/01/17	05/01/17
<input checked="" type="checkbox"/>	14 Prototype	Joe	04/01/17	06/10/17
<input checked="" type="checkbox"/>	9 Roadmap Item 1	Linda	01/01/17	03/30/17
<input checked="" type="checkbox"/>	7 Roadmap Item 3	Evan	04/01/17	06/10/17

Sync Linked Items

linked items will be synced.

☒ Capacity
☒ Capacity
☒ Actual

☒ Financials
☒ Currency
☒ Benefit
☒ ROI
☒ IRR
☒ NPV
☒ Payback Period
☒ Capital Cost
☒ Operating Cost
☒ Actual Capital Cost
☒ Actual Operating Cost

SYNC

☒ Control WHAT and WHEN you SYNC Roadmap Items and Attributes

Control



Put the control on what to sync in the hands of the user – per scenario

Budgets – Submit for Approval

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

CONVERSATIONS TASKS DOCUMENTS STATUS RISKS & ISSUES FINANCIALS DOCUMENTS STATUS PROJECT

Mar Plan by Resources

SHOWING VIEW Budget to Forecast

GROUP BY Cost Type

Cost Type	Transaction Class	Role	Q1 2017				Q2 2017				TOTALS
			BUDGET	FORECAST	VARIANCE	% VARIANCE	BUDGET	FORECAST	VARIANCE	% VARIANCE	BUDGET
			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	(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
▼ 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

Results



Submit Cost Plan for Approval

Update the Classic UI Skin

The screenshot displays the CA PPM Classic UI interface. At the top, a navigation bar includes 'CA PPM', a progress bar for 'Eclipse Enhancements', and a 'NEEDS HELP' button. Below this, a menu bar lists various project management functions: TASKS, LINKS, STAFF, CONVERSATIONS, FINANCIALS, RISKS, ISSUES, CHANGES, DETAILS (highlighted), STATUS, and DOCUMENTS. The main content area is titled 'PROJECT SUMMARY' and contains the following information:

- PROJECT NAME ***: Eclipse Enhancements
- PROJECT ID**: PR1146
- SCHEDULER FORMAT**: Microsoft P
- WINDOW STATE**: CA PPM
- START ***: May 01 2018
- FINISH ***: Oct 02 2018
- % COMPLETE**: 0%
- DEPARTMENT OBS**: Corporate > Product Management > Product Management PPM
- OBJECTIVE**: This project will bring in additional enhancements for the Eclipse business application based on Voice of the Customer requirements gathered from our customers. We will also improve performance (also noted by customer feedback). We will implement new features and make performance improvements to ensure success.

Below the project summary, the 'STAKEHOLDERS' section lists the following roles and names:

- MANAGER**: Lewis, Dana
- SPONSOR**: Matthews, April
- STEERING COMMITTEE**: Patel, Shilpa; Thompson, John
- PROJECT MANAGEMENT OFFICE**: Olney, Pam
- FINANCE AND GOVERNANCE**: Granger, Paula

Idea: Datamart Performance Upgrade - Properties - Main - Idea Summary

Idea Summary

SUBJECT
Datamart Performance Upgrade

IDEA ID
ID1010

IDEA TYPE
Infrastructure Deployment

IDEA CATEGORY
Server Changes

IDEA PRIORITY
Medium

IDEA PROGRESS
New

FAST TRACK
☐

OBJECTIVE
Move to latest database version, analyze and optimize most used queries, and add periodic summarization of critical financial metrics

STATUS
Approved

PROGRESS
Not Started

WORK STATUS
Requested

REQUESTOR
Quinn, Randy

SPONSOR
Roberts, Beth

MANAGER
Martin, Paul

START DATE
8/1/2018

FINISH DATE
2/28/2019

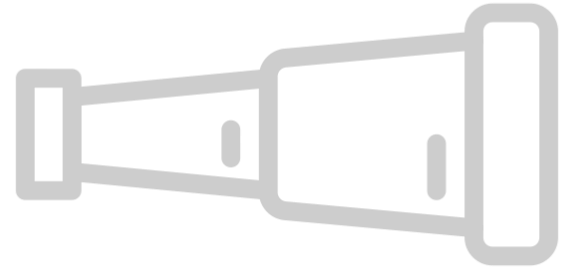
One
Workspace



Simplify the user experience

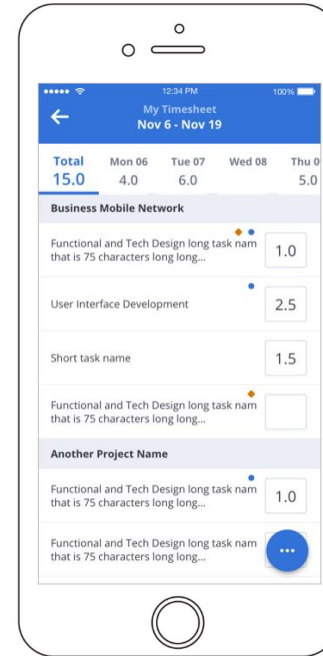
Beyond

Winter Spring & Summer



Mobile Platform

- ✓ My Alerts
- ✓ Approvals (workflow, Time etc)
- ✓ Dashboards
- ✓ Collaboration



Convenient



Mobile is not just a timesheet. Platform designed for continuous delivery of capabilities

Project Task Assignments in the Grid

✓ Pivot on people/work

✓ Edit assignments directly in grid format

The screenshot shows the 'Eclipse Enhancements' interface. At the top, there's a navigation bar with tabs: TASKS, LINKS, STAFF, FINANCIALS, CONVERSATIONS, RISKS, ISSUES, CHANGES, DETAILS, STATUS, and DOCUMENTS. Below this is a search bar and a 'NEW TASK' button. The main content area is titled 'CA PPM' and shows a list of tasks assigned to 'Dana Lewis'. The tasks are:

- Risk Response and Mitigation Plan (Dana Lewis, Carlos Perez)
- Prepare cost benefit analysis (Dana Lewis)
- Prepare cost benefit analysis (Dana Lewis)
- Define Scope Change and Control Process (Dana Lewis)
- Requirements Definition (Dana Lewis)

Each task row includes columns for Start, Finish, Status, and % Complete. A sidebar on the right allows filtering by Conversation, Project Name, Name*, Team Member, Start*, Finish*, and Status.

Resource	Project	Phase	Task	Start	Finish	% Complete	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6....
Mary Jones							60	40	50	40	40	40
	Project 1	Phase 1	Task 1	10/1/18	10/30/18	10%	20	10	10	10		
	Project 1	Phase 1	Task 2	10/1/18	10/30/18	20%	40	30	30	20		
	Project 1	Phase 1	Task 3	10/15/18	11/15/18	30%	0	0	10	10	40	40
George Trainer							40	40	50	40	60	60
	Project 1	Phase 1	Task 4	10/1/18	10/30/18	10%	20	10	10	10		
	Project 1	Phase 1	Task 5	10/1/18	10/30/18	0%	20	30	30	20	20	20
	Project 1	Phase 1	Task 6	10/15/18	11/15/18	50%	0	0	10	10	40	40
George Trainer							50	40	40	50	60	60
	Project 1	Phase 2	Task 4	10/1/18	10/30/18	10%	10	10	0	0	0	0
	Project 1	Phase 2	Task 5	10/1/18	10/30/18	0%	10	30	0	20	20	20
	Project 1	Phase 2	Task 6	10/15/18	11/15/18	50%	0	0	10	10	0	0
	Project 1	Phase 2	Task 7	10/15/18	11/15/18	50%	0	0	10	10	0	0
	Project 1	Phase 2	Task 8	10/15/18	11/15/18	50%	20	0	10	10	40	40
	Project 1	Phase 2	Task 9	10/15/18	11/15/18	50%	10	0	10	0	0	0

Configure



Project Task grid view – Display and edit custom Task attributes

Budgets are coming to the modern UX

SUBMIT FOR APPROVAL

PLAN NAME*

PLAN ID*
FP1493284920_pla

PLAN DESCRIPTION

PERIOD TYPE*
Monthly

START PERIOD*
05-2017

FINISH PERIOD*
12-2018

SUBMIT

CA PPM

Automated Security Enhancements

ON TRACK

CHANGES RISKS LINKS STATUS FINANCIALS CONVERSATIONS DOCUMENTS DETAILS TASKS

NEW PLAN

PLAN NAME CREATED DATE PERIOD TYPE START PERIOD FINISH PERIOD STATUS REVISION BUDGETED COST

Budget Plan as of March 1, 2017 CURRENT Dec 18, 2... Monthly 2017-12 2018-04 Approved 3 480,720

Budget Plan as of F...

Budget Plan as of F...

FORWARD INC.

Automated Security Enhancements

ON TRACK

CONVERSATIONS TASKS DOCUMENTS RISKS & ISSUES FINANCIALS DOCUMENTS STATUS PROJECT

Mar Plan by Resources

SHOWING VIEW Budget to Forecast

GROUP BY Cost Type

Cost Type	Transaction Class	Role	Q1 2017				Q2 2017				TOTALS
			BUDGET	FORECAST	VARIANCE	% VARIANCE	BUDGET	FORECAST	VARIANCE	% VARIANCE	
OpEx			33,000	39,000	(6,000)	118%	33,000	33,000	0	100%	1,000,000
	Data Center		16,000	22,000	(6,000)	138%	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
	CapEx			17,000	17,000	0	100%	17,000	17,000	0	100%
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

APPROVE

REJECT

- Submit your select budget for approval
- View all your budgets for one project
- Compare budget to forecast

Results



Analyze your current budget to plan and revise your next budget

Benefit & Revenue Plans

CA PPM | eCommerce Portal | Hi, System

TASKS LINKS FINANCIALS CONVERSATIONS RISKS ISSUES CHANGES DETAILS STATUS

Benefit Plan CURRENT

Group By

		2018-02					
Benefit Class	Benefit Subclass	PLANNED	REALIZED	VARIANCE	% VARIANCE	PLANNED	REALIZED
Increase Revenue	New Customers	32,480	28,000	4,480	14%	330,280	282,000
Reduce Cost	Infrastructure	9,000	0	9,000	100%	17,000	75,000

CA PPM | Data Warehouse Upgrade | Hi, Peter

TASKS LINKS STAFF CONVERSATIONS FINANCIALS DOCUMENTS RISKS ISSUES CHANGES

Revenue - T&M

		2018-06	2018-06	2018-06	2018-06	2018-06	TOTALS	TOTALS	TOTALS	TOTALS
Revenue Role	Transaction Class	PLANNED COST	ACTUAL COST	REVENUE	DISCOUNT	NET PLANNED	PLANNED COST	ACTUAL COST	REVENUE	NET PLANNED
Account Manager	Internal Labor	5,230	5,230	6,701	0.10	1,471	7,223	7,030	9,254	2,031
Architect PS	Internal Labor	8,172	8,172	10,624	0.10	2,452	16,380	16,172	21,294	4,914
Functional Consultant	Internal Labor	6,701	6,701	8,990	0.20	2,289	13,431	12,701	18,018	4,587
Project Manager PS	Internal Labor	6,048	6,048	8,499	0.10	2,451	12,122	11,048	17,035	4,913

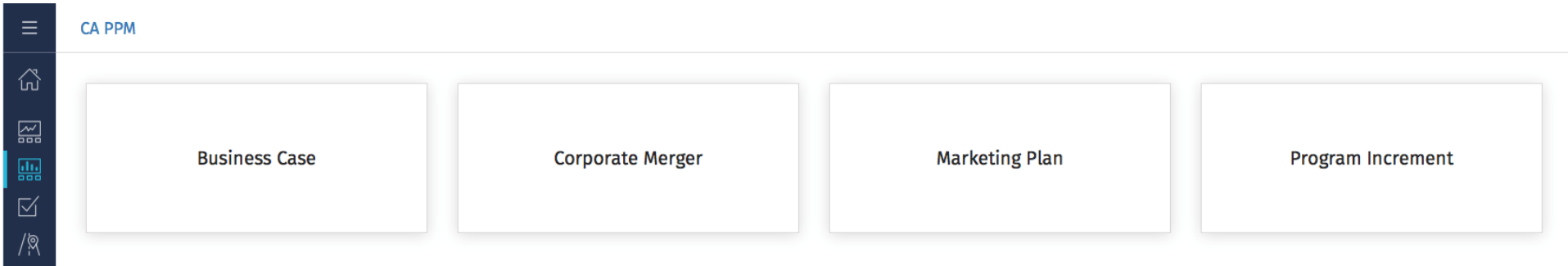
- Benefit analysis comparing planned benefit to realized benefit
- Sync cost and benefit plans – Should a cost plan start date adjust, the benefit date adjusts
- Cost plan updated with revenue associated fields and units

Convenient



Fingertip access to benefit and revenue analysis

Investment types – Staffing, Financials & Tasks



- ☒ Investment Type Blueprints
- ☒ Staffing and tracking Time
- ☒ Cost Plans & Financials

Open API's



Why call your work what we name it? Why do you need to train people on a new vocabulary?

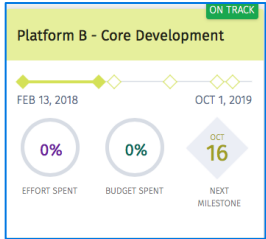
Hierarchy & Draw Down Funding

Funding for the Real World: Programs, Products, Platforms, Departments, etc in a hierarchy.

Ability to fund one investment from multiple hierarchies

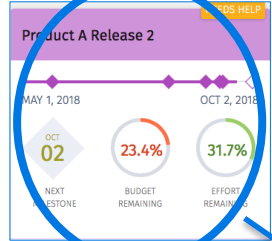
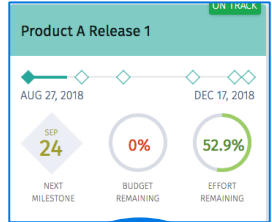
Platform B
Funding for Platform: 500k

Platform Budget:	500k
<u>Drawn Down:</u>	<u>400k</u>
Remaining:	100k



200k

Product A
Funding: 800k

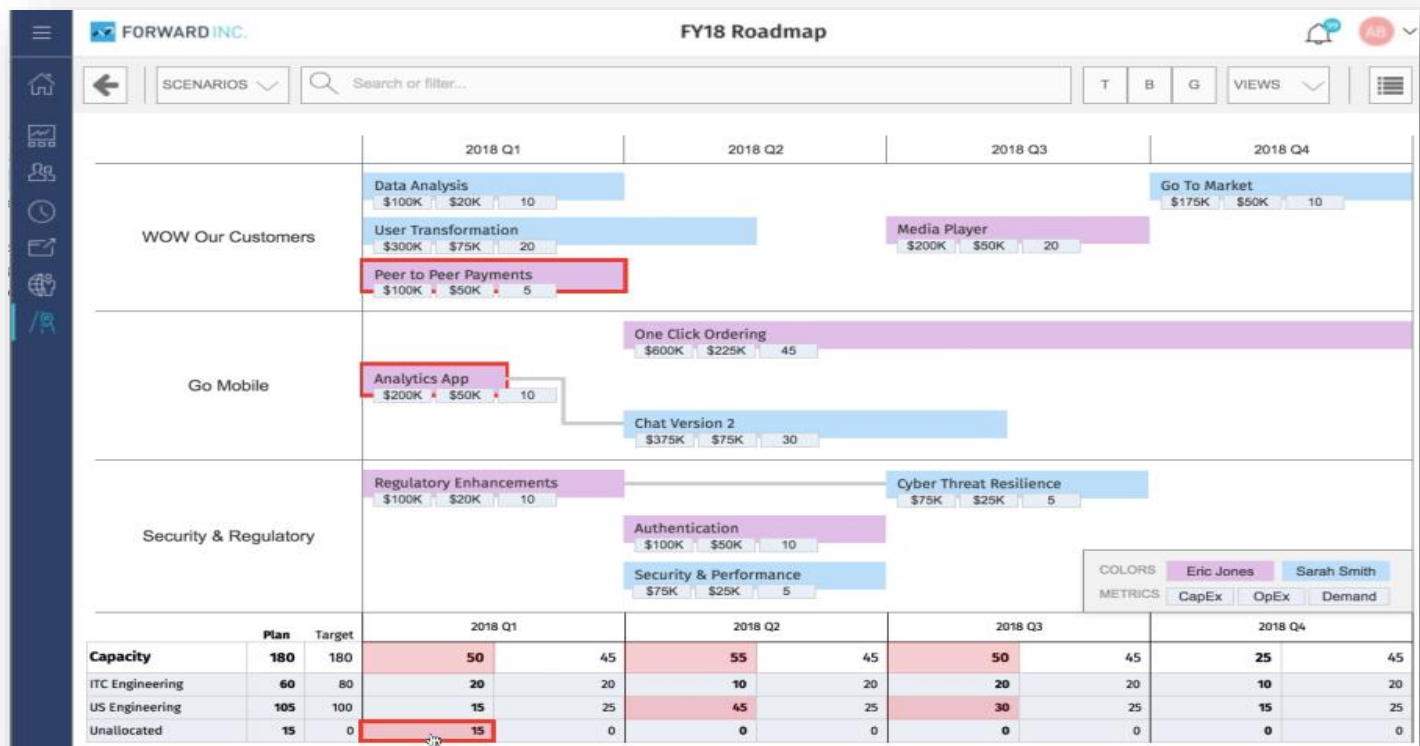


200k

Product Budget:	800k
<u>Drawn Down:</u>	<u>400k</u>
Remaining	400k
Allocated to Release 1:	200k
Allocated to Release 2:	200k

Total Budget for Release 2: 400k

Roadmap capacity planning



Power



Manage the impact of work on your people and money. The most powerful PPM planning tool on the market



Questions