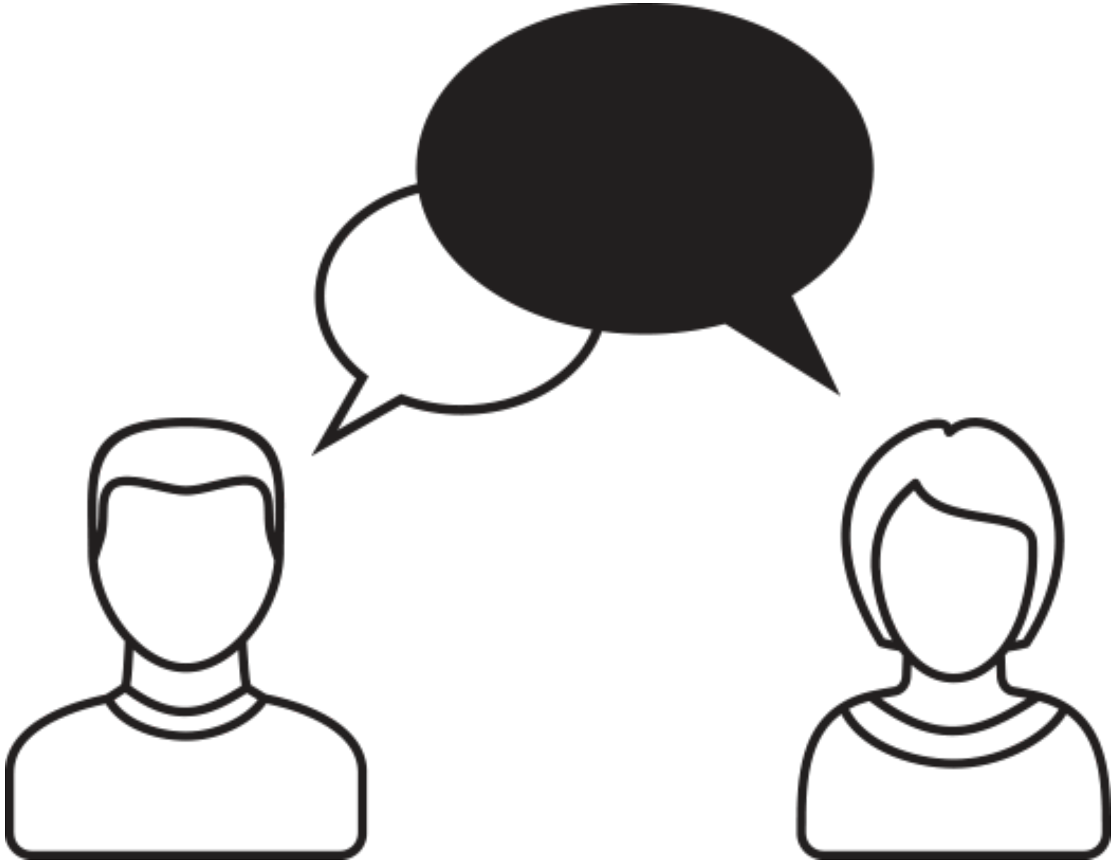
regoUniversity 2017

What’s New in 15.X?

Your Guide: Sara Garvey, Ross Hensel

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

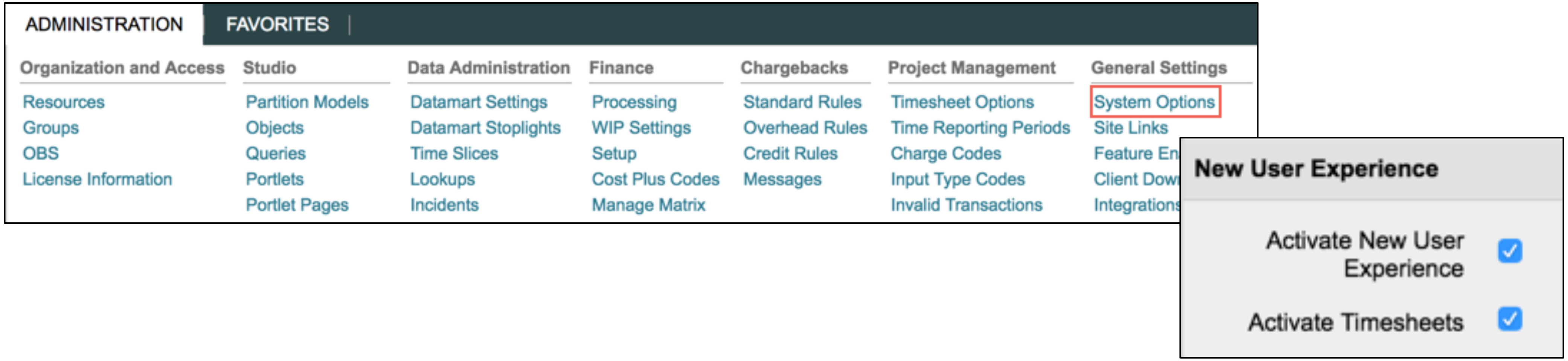
- Introduction
- 15.X Classic Experience Updates
- Enable and Access the New User Experience
- Project Management
  - Overview
  - Tasks
  - Status Reports
  - Documents
- Resource Management
  - Viewing Allocations
  - Replacing a Role
- Timesheets
  - Submitting
  - Approving
- Key Differences Between Classic and New UX

15.X Classic Experience Updates

- Resource Manager portlet updates:
  - Resource and Investment Manager as multi-select lookups
  - Booking Manager is now a filter option
- Portfolio updates:
  - Roles increased to 75 from 25
- Jaspersoft
  - No longer export report output to FTP
  - Restrict notifications to trusted domains
  - Running a report (immediate) is limited to 500 pages. Scheduling a report is limited to 1000 pages.
- MSP
  - MSP may now be installed at the system level (not a profile level)
- Reports
  - System Health Report
  - Customization and Discovery Analysis Job (Moving from On Premise to SaaS)

Enable the New User Experience (New UX)

- The new user experience disabled by default and controlled in the Classic PPM



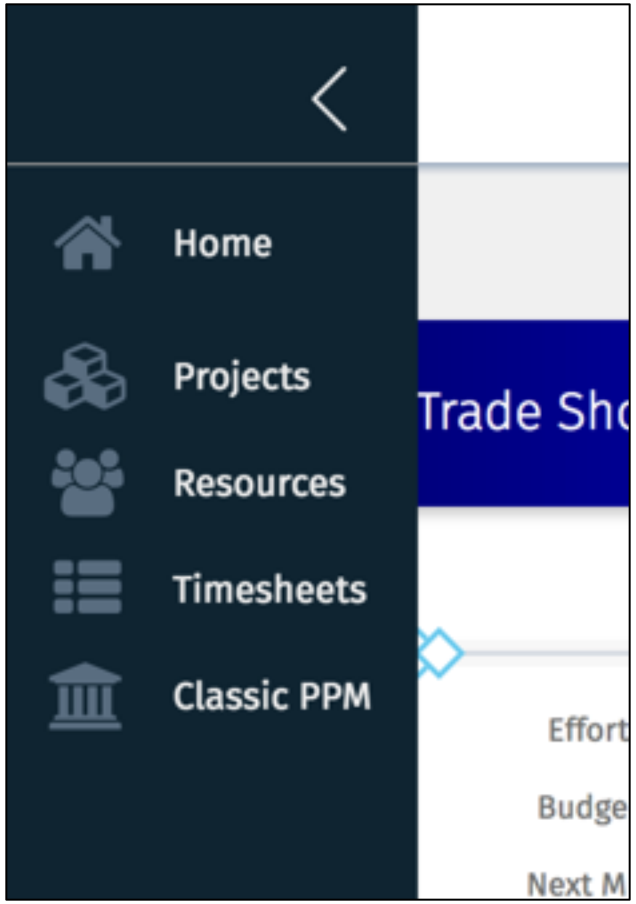
- You may choose to enable timesheets, but *Activate New User Experience* must be checked to view the new user experience
    - Timesheets may only be used in either the classic OR new user experience- not both

Accessing the New UX

- Once enabled in the new user experience is access through a separate URL
- The Classic PPM will always remain active and accessible

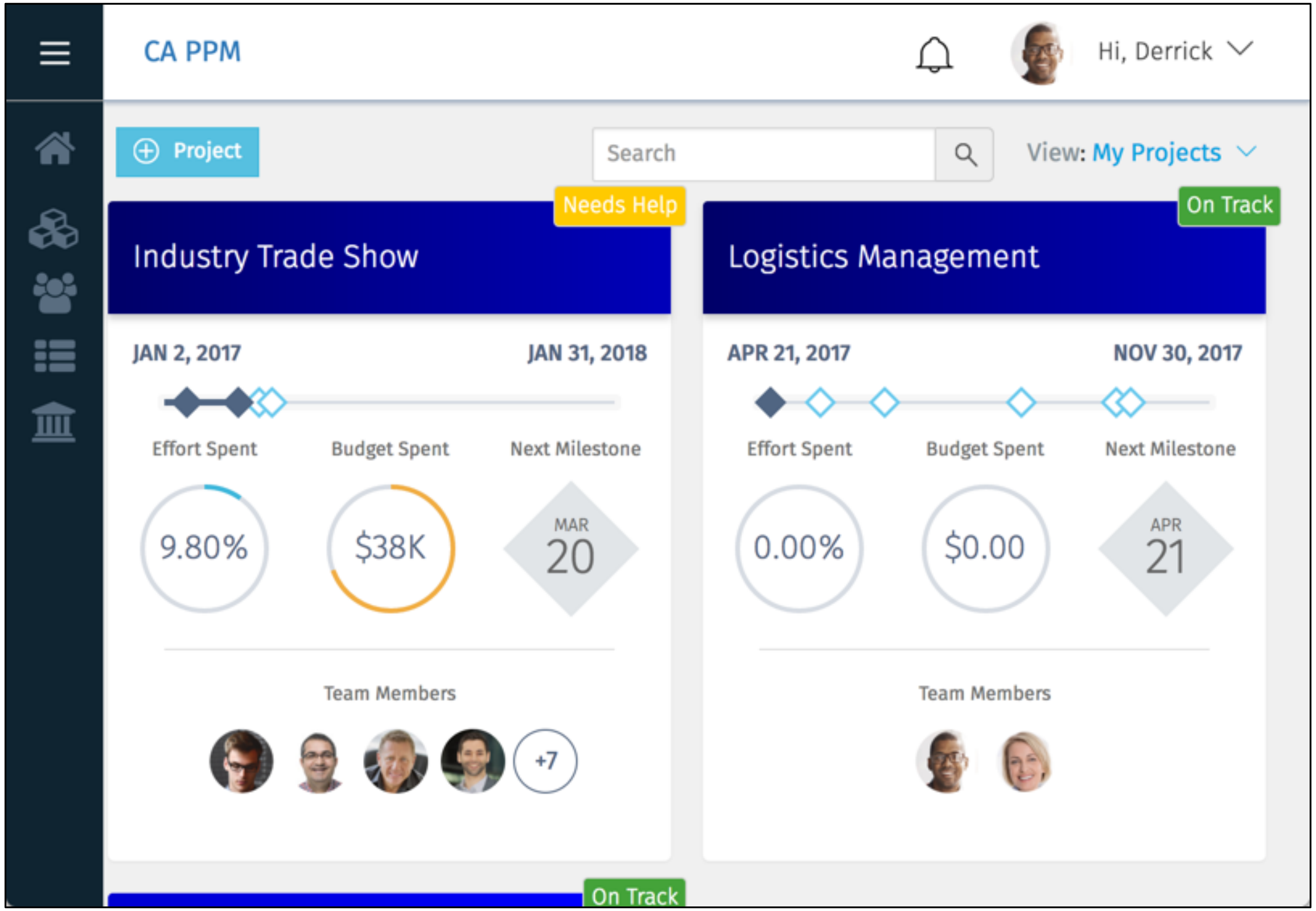
New UX – Navigation

- Navigating in the new user experience is controlled by the fly-out menu on the left side of the page
- The default landing page is the *Projects* section
- Quickly access Classic PPM from any page in the new user experience by clicking on the *Classic PPM* link
    - It will route you to the same location in Classic PPM



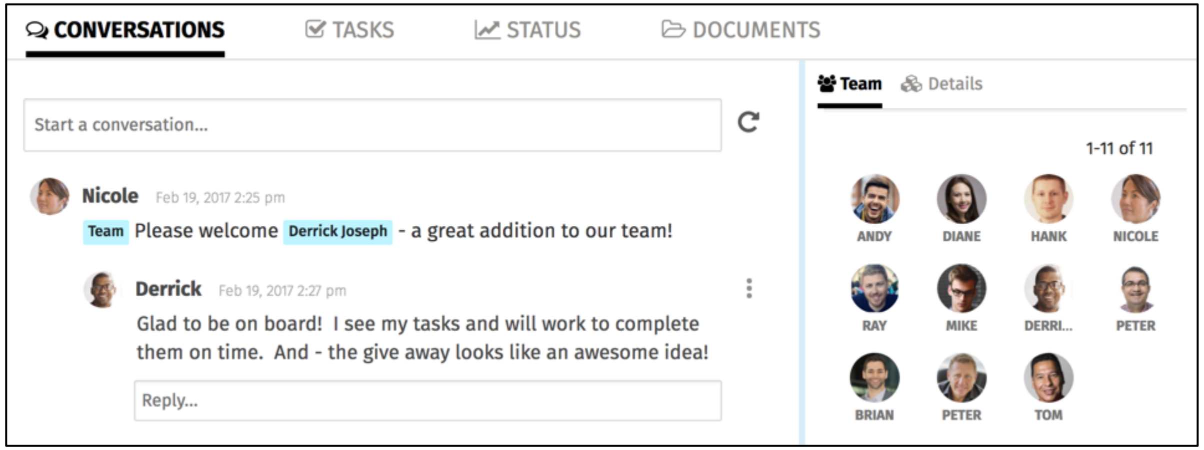
New UX – Project Management

- Projects may only be created from templates
- Filtering options are limited to:
  - My Projects
    - Staffed on or the PM
  - All Projects
  - Active Projects
  - Inactive Projects
  - Project Name Searches
- All Projects does respect security rights



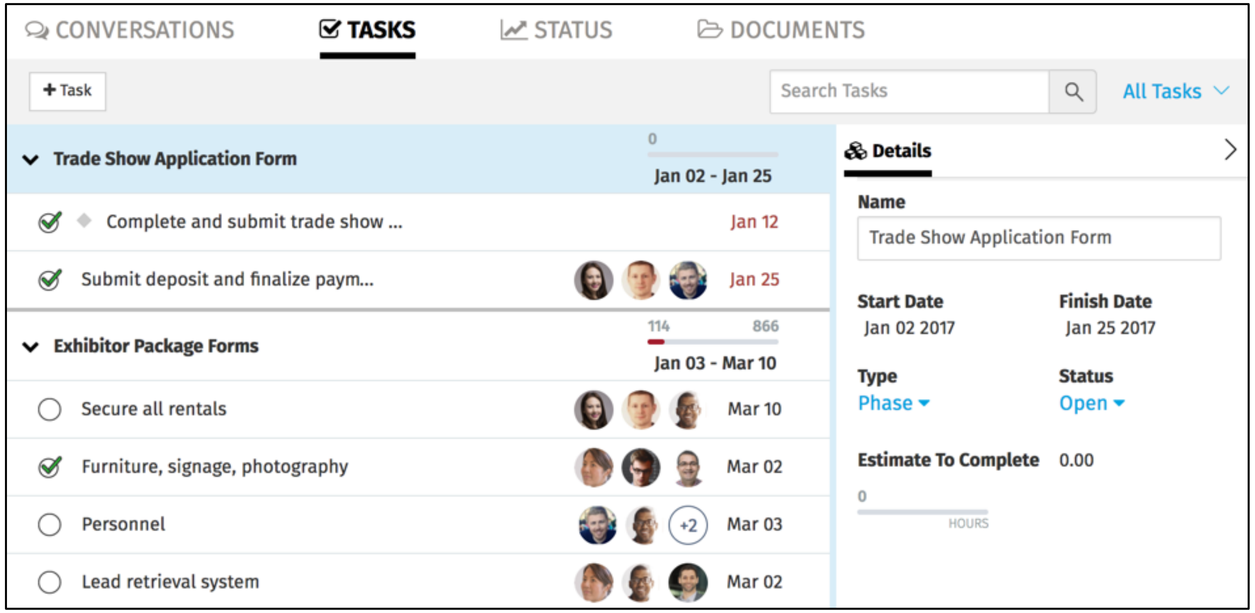
New UX – Project Overview

- The default landing page is the *Conversations* tab
  - Users may post conversation pieces in this area for project members to view
  - Team members are displayed and the Project Manager may add additional or remove team members
  - The *Details* section provides basic project information as well as financial information
    - All fields are OOTB and the page is not configurable
    - Simple budgets (no cost plans) financials will be editable in this view. Projects with cost plans will have their financial fields as read-only



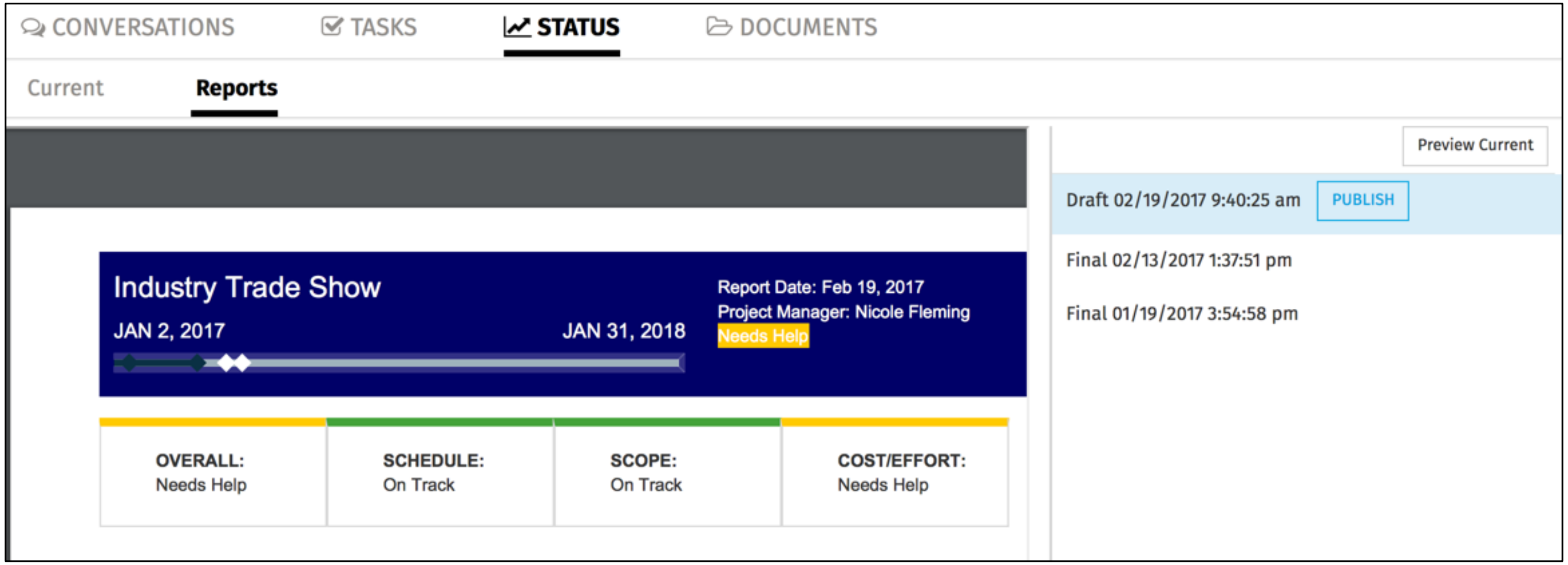
New UX – Tasks

- New collaborative approach for task management
  - Tasks may be created and edited by any project team member
  - To-Dos may be created on each task
  - Only two levels of the WBS are viewable in the new UI



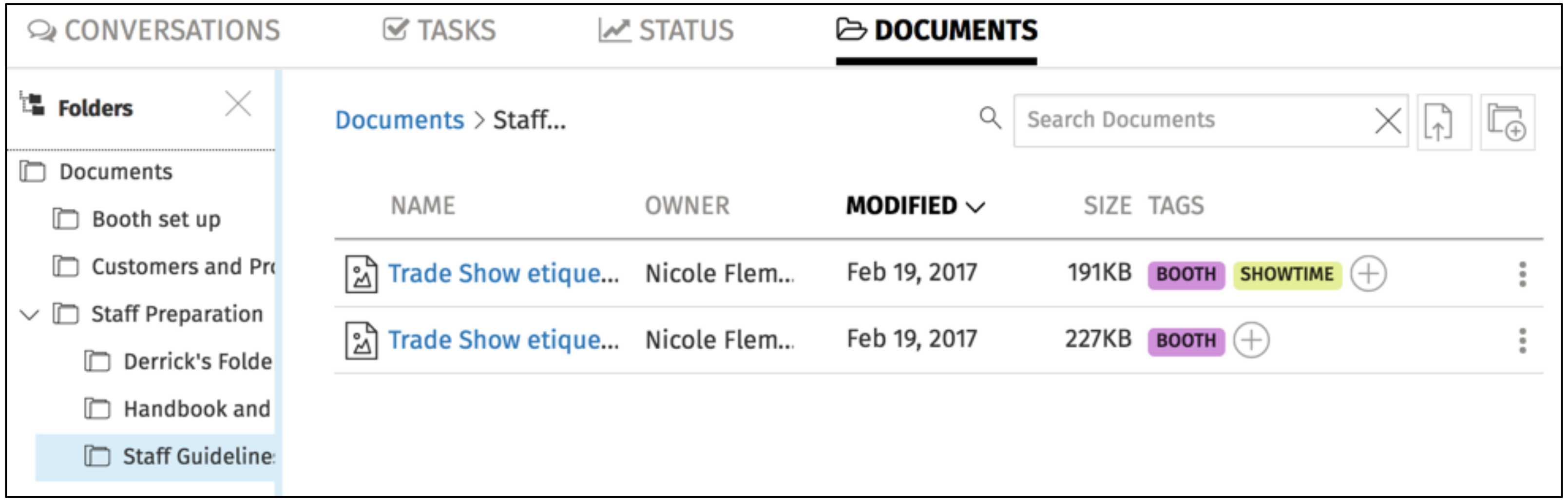
New UX– Status Reports

- Status Reporting is now built into each project
- Previous reports are saved and stored within the projects
- Editing a current status report will create a draft (Patch 15.1.0.1)



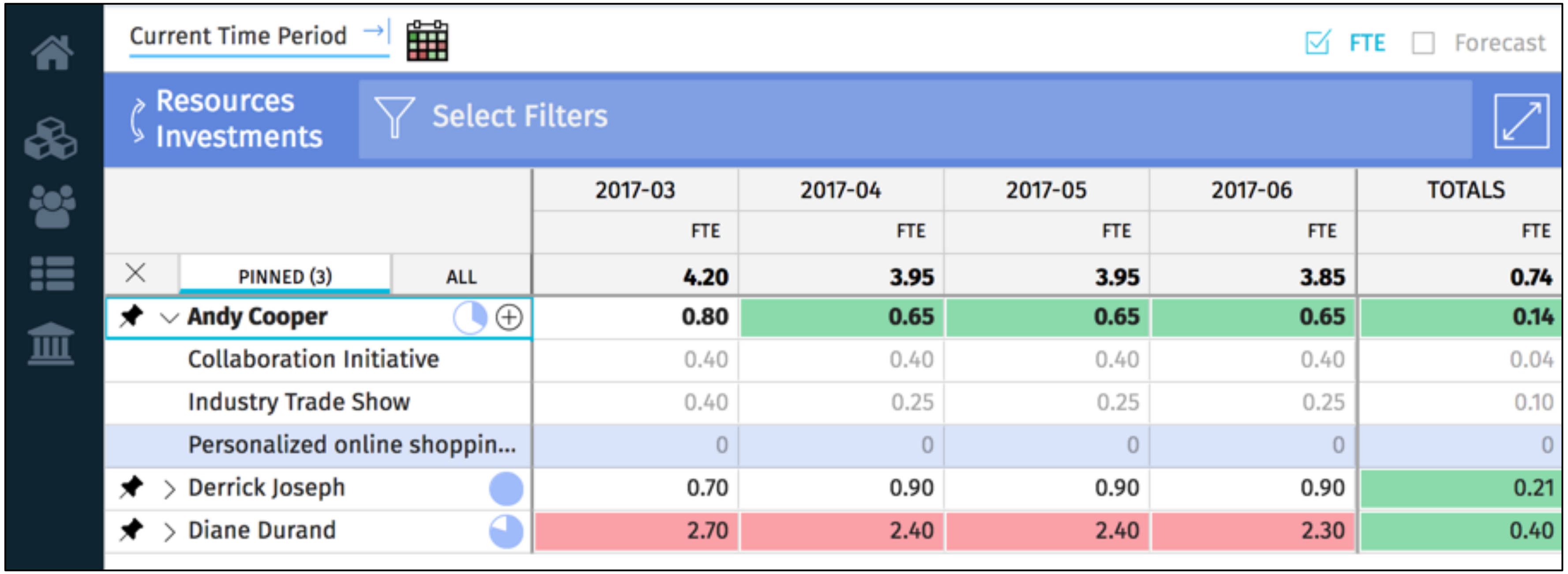
New UX – Documents

- A documents tab is available for storage.
- Documents provides a hierarchical structure for creating folders and storing documents. Tags provide a quick way to flag similar documents.
- Team members are granted access to these documents.



New UX – Resource Management (15.2)

- 15.2 allows for Resource Management functionality
- A new view allows allocations to be
- *Team* functionality has been added

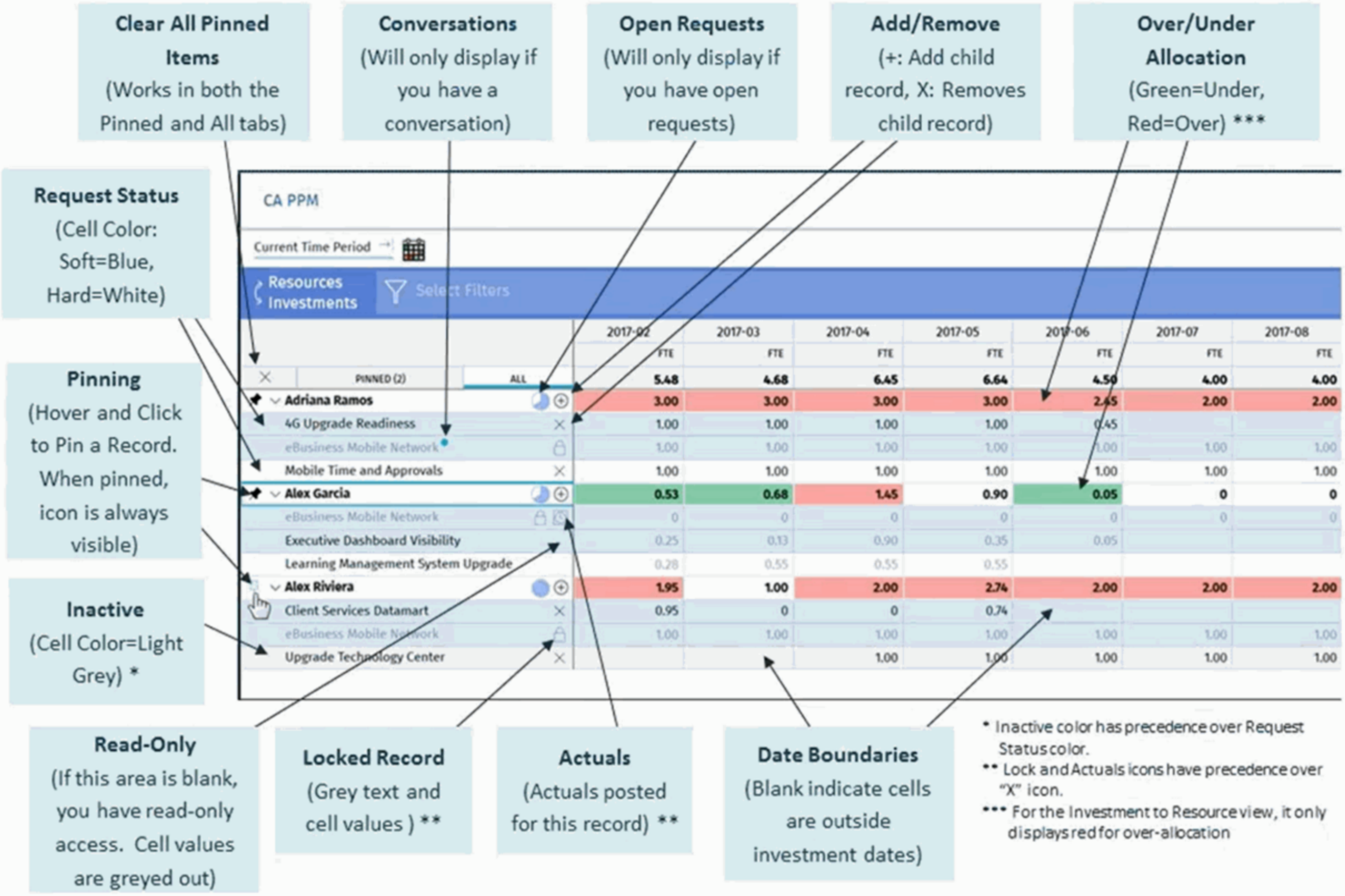


New UX – Viewing Resource Allocations (15.2)

- Pin specific Projects so they appear in the list first
- Copy and Paste functionality in cells (similar to excel)
- Ability to view allocation by investment or resource

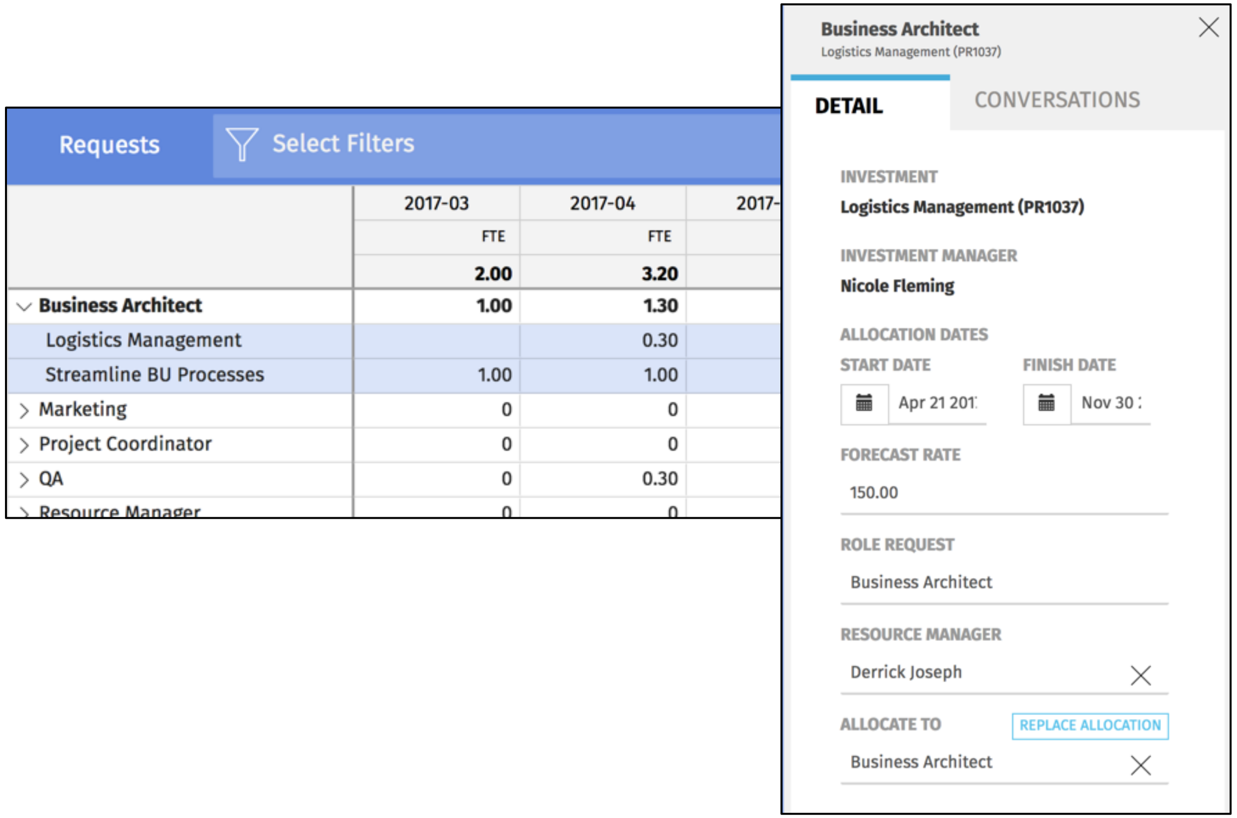
Investments
Resources
Select Filters

	2017-02	2017-03	2017-04	2017-05	2017-06	TOTALS
	FTE	FTE	FTE	FTE	FTE	FTE
PINNED (0) ALL	39.80	39.33	49.84	49.32	47.84	41.19
B2B Enhancements	**6.00**	**6.00**	**4.55**	**4.45**	**4.40**	**4.82**
Dudley Danes	0.70	0.70	0.20	0.20	0.20	0.31
Hank Fisher	0.40	0.40	0.20	0.20	0.15	0.22
Mike Jones	0.40	0.40	0.40	0.30	0.30	0.31
Nicole Fleming	0.20	0.20	0.20	0.20	0.20	0.20
Peter Phillips	0.50	0.50	0.20	0.20	0.20	0.33
Ray Fowler	0.60	0.60	0.15	0.15	0.15	0.25


Clear All Pinned Items (Works in both the Pinned and All tabs)
Conversations (Will only display if you have a conversation)
Open Requests (Will only display if you have open requests)
Add/Remove (+: Add child record, X: Removes child record)
Over/Under Allocation (Green=Under, Red=Over) ***
Request Status (Cell Color: Soft=Blue, Hard=White)
Pinning (Hover and Click to Pin a Record. When pinned, icon is always visible)
Inactive (Cell Color=Light Grey) *
CA PPM
Current Time Period
Resources
Investments
Select Filters
2017-02
2017-03
2017-04
2017-05
2017-06
2017-07
2017-08
FTE
PINNED (2)
ALL
Adriana Ramos
4G Upgrade Readiness
eBusiness Mobile Network
Mobile Time and Approvals
Alex Garcia
eBusiness Mobile Network
Executive Dashboard Visibility
Learning Management System Upgrade
Alex Riviera
Client Services Datamart
eBusiness Mobile Network
Upgrade Technology Center
Read-Only (If this area is blank, you have read-only access. Cell values are greyed out)
Locked Record (Grey text and cell values) **
Actuals (Actuals posted for this record) **
Date Boundaries (Blank indicate cells are outside investment dates)
* Inactive color has precedence over Request Status color.
** Lock and Actuals icons have precedence over "X" icon.
*** For the Investment to Resource view, it only displays red for over-allocation

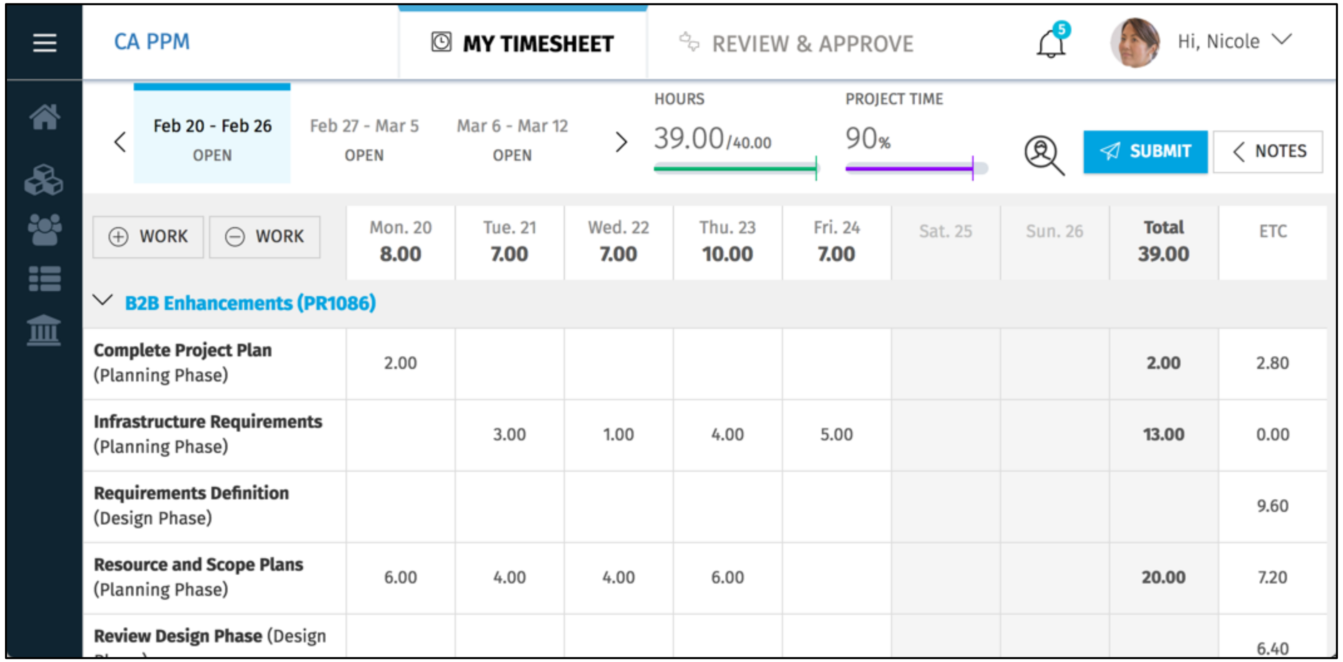
New UX – Replacing a Role (15.2)

- Role replacement is done by Resource Manager and not Staff OBS
- The RM/PM may have conversations built right into the tool
- Use "Forecast Rate" to plan for dollars spent



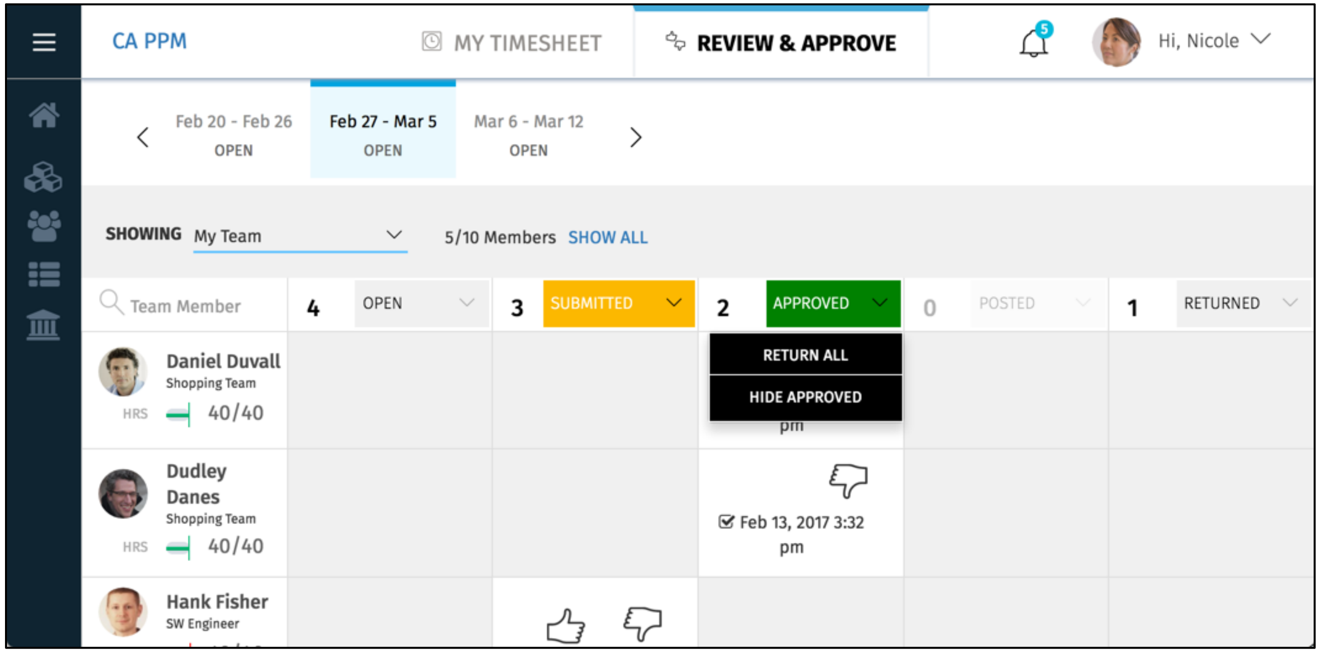
New UX – Submitting Timesheets

- Timesheets can only be active in Classic PPM or the new user experience
  - The timesheets link is removed from Classic PPM if it's enabled in the new user experience
- Increased visibility into timesheet and task notes with numbered icons
- Submit time for other users (15.2)



New UX – Approving Timesheets

- Any user with timesheet approval rights may approve timesheets
- Timesheet summary is available to quickly review timesheets
- If the timesheet is in a status of *Submitted* then you may review the detailed timesheet



What data is available?

	New UX	Classic UX
Project Information	✓	✓
Task Information	✓	✓
Status Reports	✓	✓
Conversations (Project Level)	✓	
To Dos (Task Level)	✓	
Timesheets	✓	✓
Documents	✓	✓
Resource Booking Conversations	✓	
Resource Allocations	✓	✓

New User Experience – Other FAQs

- A link to the new user experience is not provided out of the box, but CA has documentation on how to create it
- Processes may still be triggered
  - Example, a process to lock the Start/Finish dates when a project is created

When to use it

- Company, division, or group that manages less complex projects that do not need detailed WBS

Key Differences Between Classic and New UX

	Classic	15.1	15.2
Studio object configuration (add custom fields)	✓		
Submit timesheets for others (timesheets cannot be enabled in both)	✓		✓
View detail of approved/posted timesheets	✓		
Team members may edit WBS by default		✓	✓
Detailed WBS (more than 2 levels)	✓		
View conversations and task to dos		✓	✓
OBS based filtering	✓		
Uses Rate Matrix rates for Planned Costs	✓		
Forecast rate field can override Rate Matrix for Planned Costs		✓	✓
Allows mixed booking	✓		
Utilize Resource Manager assignment for role replacement		✓	✓
Allows segmented allocation	✓		
Multi resource replacement (1 role filled by many resources)	✓		

Appendix

- 15.1 Bookshelf
  - https://docops.ca.com/ca-ppm/15-1/en
- 15.2 Bookshelf
  - https://docops.ca.com/ca-ppm/15-2/en/
- How to create OOTB link to New UX in Classic UX
  - https://docops.ca.com/ca-ppm/15-1/en/using/getting-started-with-the-new-user-experience/create-a-menu-link-from-classic-ppm-to-the-new-user-experience

Questions?

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- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button

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