

*rego*University 2017

Upgrade | Strategies

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Agenda

- Why Upgrade?
 - Key Functional Features
 - Open Discussion
- Upgrade Process
 - Planning
 - Execution
 - Open Discussion
- Wrap-up

Why upgrade?

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Key New Features

- Copy Team and Team-linked Cost Plans (14.3)
- Integration with CA Agile Central – Rally (14.4)
- Revised Timesheet Populate Options (14.4)
- Financial Plans included in DWH (14.4)
- New User Experience - Project and Time (15.1)
- Portfolio Roles Increased from 25 to 75 (15.1)
- New User Experience – Resource Management (15.2)
- Notifications and Tagging (15.2)
- Project Document Management (15.2)
- Timesheet Submission for Any User (15.2)

- Why have you upgraded?

OR

- Why have you NOT upgraded?

End of Life Announcements

Version	EOL Date
13.2	April 30, 2016
14.1 & 14.2	June 30, 2017
14.3**	December 31, 2017

**Last version with Business Objects

**Must migrate to Tomcat (WebSphere no longer supported)

CA does honor maintenance contracts that extend beyond the EOL date

- Three types of upgrades
 1. **Fresh Start:** Start over with a clean environment in a new version of CA PPM and we are able to migrate specific data sets
 2. **Traditional:** Performing an upgrade to a new version of CA PPM in either an On Demand or On Premise environment
 3. **Move to On Demand from On Premise during upgrade**
 1. CA will automatically upgrade your environment as part of an On Demand upgrade

Share your experiences

Upgrade process

This presentation assumes current CA PPM (Clarity) version of 13.0 or above, and target version of CA PPM 14.4 or 15.1

Any comment marked with an asterisk (*) applies only to On Premise environments

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Upgrade Process: Planning

- *Infrastructure – Validate architecture, sizing and capacity of current environment to support requirements for new version, including both Business Objects and Jaspersoft (refer to Release Notes of target version). Plan for changes as required.
- Client Applications – Browsers, MS Office (or other), MS Project, Open Workbench, etc. Validate version compatibility. Plan for changes as required.
- Plan for the upgrade in a DEV/TEST environment. Prior to upgrading, ensure the data is refreshed with PROD data.

Upgrade Process: Planning (cont'd)

- Capture a pre-upgrade image of CA PPM for comparison with post-upgrade image.
- Perform a DB refresh of PROD into the Test environment, to enable a side-by-side comparison after upgrade, and to ensure you are testing the full PROD configuration.
- For On Demand environment, all these refreshes and upgrades must be scheduled with CA SaaS team.
 - PROD upgrades are always scheduled to start on Fridays, at 8pm Pacific Time.
 - Non-PROD upgrades are always scheduled to start on Mondays, at same time.
 - Note: CA schedules a maintenance outage for On Demand sites the second weekend of each month.

Upgrade Process: Planning (cont'd)

- Plan for new functionality that will impact your business processes. A best practice is to perform the upgrade first, and then implement new functionality as a separate project.
- Plan to engage a slice of the organization for conducting UAT, especially for business processes. If you have multiple business units represented (IT, R&D, etc), get users from each group.
- Plan to conduct training on new functionality. This cannot be over-emphasized.

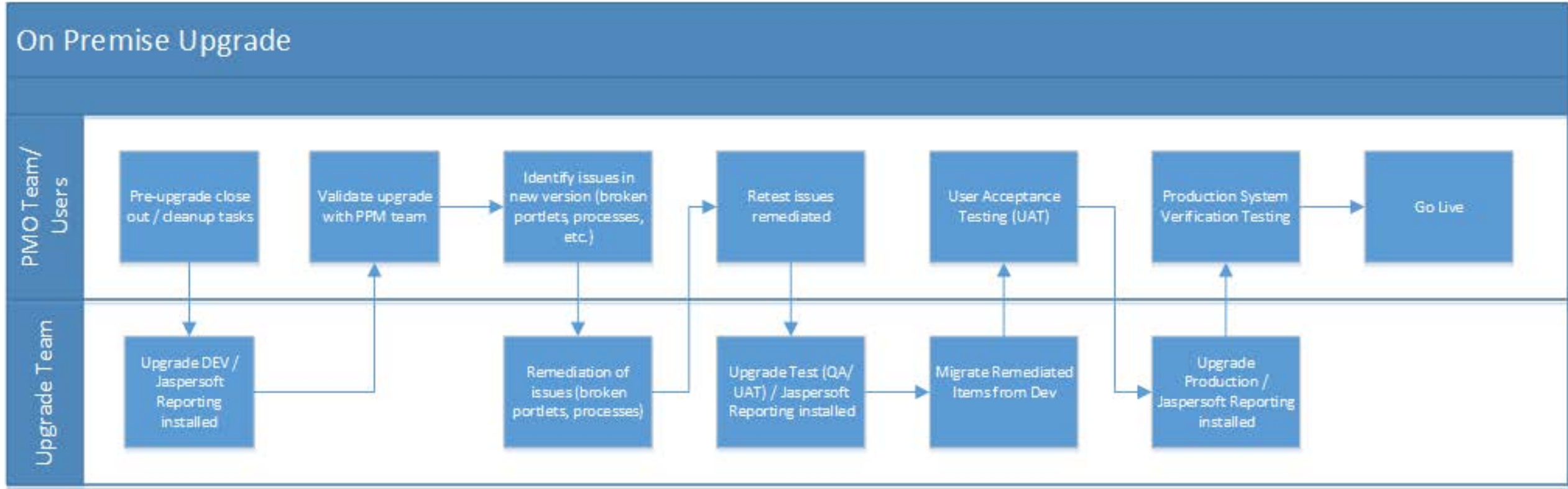
Upgrade Process: Execution

- *Perform upgrade of test environment.
- *Develop a Run Book of the upgrade at the Dev upgrade stage, follow it to a 'T' in Test and PROD should go like clock-work with the Run book.
- Validate upgrade by comparing current configuration image with pre-upgrade image.
- Document all variances, and correct errors. This will become your remediation checklist when upgrading PROD.

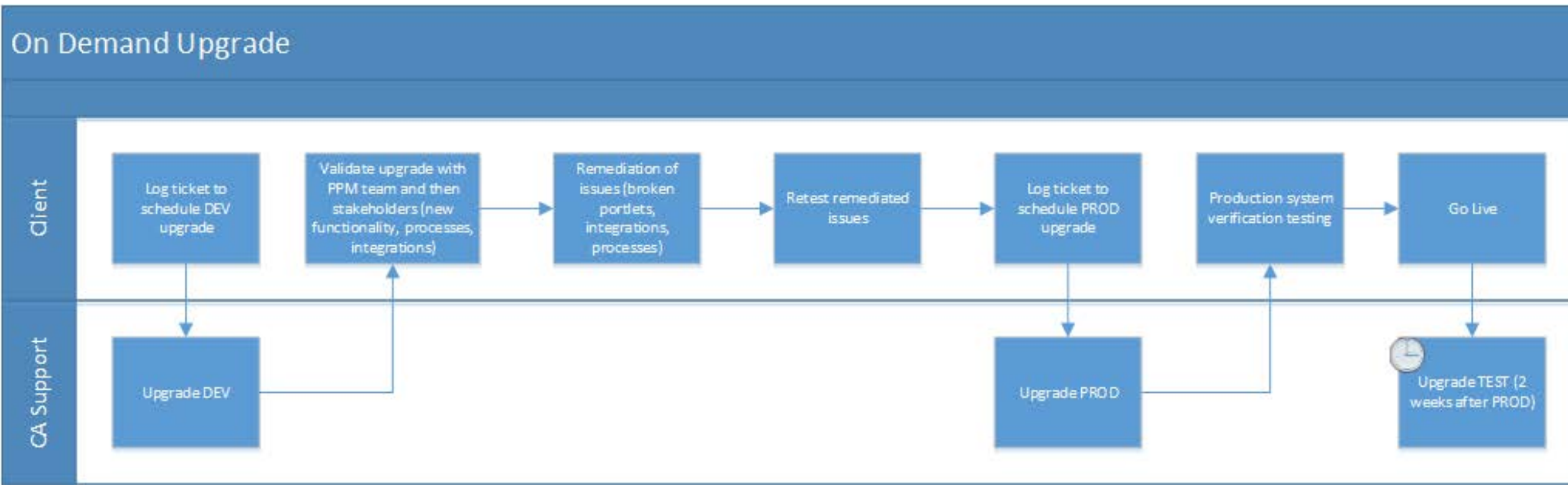
Upgrade Process: Execution (cont'd)

- Run UAT scripts on business processes.
- Setup Jaspersoft Data Warehouse configuration (CA will NOT perform this setup for On Demand environments. They will install the software, but not run the setup.).
- Prepare training materials and communication plan for new functionality.

Upgrade Process: On Premise – Happy Path



Upgrade Process: On Demand – Happy Path



Open Discussion

- How often do you upgrade?
- What have been your biggest challenges in upgrading?
- Any success stories?
- Please remember to fill out the class survey.

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