

CA PPM Ongoing Enhancement Process | Best Practices

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Introductions

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



Agenda

- Introduction
- Know Your User Base
- Governing Bodies
- Release Process Best Practices

Introduction

Do you want to understand what other organizations are doing to manage ongoing CA PPM enhancements and releases?

This class will review some best practices we have seen within our customers to managing a successful backlog of CA PPM work.

Know Your User Base

- Is it one department?
- Multiple departments?
- Do you have integrations?
- How many users?
- How big is the risk if a release went bad?

Open Mic

- How is your organization represented in your release process?
- How do you determine the committee members?
- What does your prioritization process look like?

Best Practice: Governance Team Members

- Decision makers who can promote change within their organization
- Understand CA PPM functional and support overall roadmap and vision
- Represent various constituents – IT/Business, Functional/Technical SMEs
- Flexibility to compromise for the good of the company

Open Mic

- What is your cycle time for releases?
- How do you determine what is packaged in releases?
- Where do you house enhancements to the application?
- Who approves changes to the application?

Best Practice: Overall Release Process

- Short cycle time
 - Delays in enhancements can lead users to look elsewhere to get their data or implement their own process
- Global architecture, local flexibility
 - All requests should meet the global functional and data architecture, but it should also be flexible to allow local reporting and processes that vary
- Everyone has a seat, but someone is in charge
 - The governing body can review and make decisions on what proceeds in which order; however, there should be a “global” owner of the application to make final decisions

Best Practice: Release Schedule And Criteria

- Major Release (Quarterly)
 - Significant impact to infrastructure or end-user community
 - Any enhancement or change that requires mandatory instructor led training and communication plan
 - Any enhancement or change that requires architectural changes to application
 - Examples
 - New functionality, adding or significantly changing modules (IE: Finance, Demand Management)
 - Significant changes to business process that requires action from new and/or existing participants

Best Practice: Release Schedule And Criteria

- Minor Release (Monthly)
 - Moderate impact to infrastructure or end-user community
 - Any enhancement or change that requires communication and/or training to end-users
 - Any change to supporting infrastructure that requires coordination with more than one other IT department or area. IE: DBA Team, Identity Management, etc.
 - Examples:
 - DB upgrade
 - SSO implementation

Best Practice: Release Schedule And Criteria

- Maintenance and Support (Weekly maintenance window)
 - No impact to infrastructure or end-user community
 - Defect or issue resolution
 - Any enhancement or change that does not require training or change management
 - Examples
 - Adding values to a lookup
 - Modifying an OBS structure
 - Modifying an attribute label or adding an attribute to a view
 - Adding a new report to Reports and Jobs

Best Practice: Request Repository

- Create an object within CA PPM or utilize an existing application for tracking requests

Work Request - Prioritization														
Name	ID	Focus Area(s) of Impact	Priority Score	Value Impact	Employees Impacted	Compliance	Complexity	Strategic Alignment	Status	Target Release	Impacted Division	Support Level	Related Work Request	Created Date
FIN - PA Actuals Lock Down Oracle Fields	WR4635	PM	2.6	Low	<40	Accuracy	> = 5hrs - < 30hrs	Aligns with 2	Awaiting Approval		NA	Level 2		5/21/15
FIN - Labor on HW Tasks	WR4686	PM	3.0	Medium	<40	Accuracy	> = 5hrs - < 30hrs	Aligns with 2	Awaiting Approval		NA	Level 2	WR2182	6/22/15
FIN - Automate Cap Finish Date Updates	WR4700	PM	2.6	Low	> = 40 - < 60	Accuracy	> = 30 Hrs	Aligns with 2	Awaiting Approval		NA	Level 2		7/1/15
PM - PM Weekly Time Notification	WR4774	PM	2.6	Medium	<40	Accuracy	> = 5hrs - < 30hrs	Aligns with 1	Awaiting Input		NA	Level 2		9/3/15
JS - Idea Estimate Extract Report in JS	WR4777	DM	3.8	High	<40	Accuracy	> = 5hrs - < 30hrs	Aligns with 3 or more	Awaiting Input			Level 2		9/15/15
JS - Convert Existing Crystal Reports to JS	WR4780	PM	3.0	High	> = 40 - < 60	Other-N/A	> = 30 Hrs	Aligns with 3 or more	Awaiting Input			Level 2		9/16/15
FIN - Budget Year over Year Control	WR4894	PM	1.4	Low	<40	Other-N/A	> = 5hrs - < 30hrs	Aligns with 1	Awaiting Input		NA	Level 2		1/8/16
FIN - Financial View & Financial Forecast Calculat	WR4911	PM;Portfolio	4.2	High	> = 40 - < 60	Accuracy	< 5hrs	Aligns with 2	Awaiting Input		NA	Level 2		1/26/16

Displaying 1 - 8 of 8

Best Practice: Testing

- Area specific – try to focus releases
- Targeted
 - Impacted end-users
 - Requestor
- Formal / informal
- Track testing and approvals
 - Use CA PPM or spreadsheets or tool

Best Practice: Migration

- Plan a migration off hours
- Sanity check – manual vs. XOG
- When to XOG
 - Portlets
 - Processes
 - Mass data
- When to move manually?
 - Object changes (new fields, moving fields, lookups)
 - Portlet pages
 - Specific security rights
 - OBS and other data

Best Practice: Deployment

- Pre-Communicate – let them know what is coming
- Communicate with Release Notes
- Train users as needed (lunch and learns)
- Configuration deployment can be on a different cycle then the rollout to end users – separate when you can

Questions?



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- Click on **Report PDU's**
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- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



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