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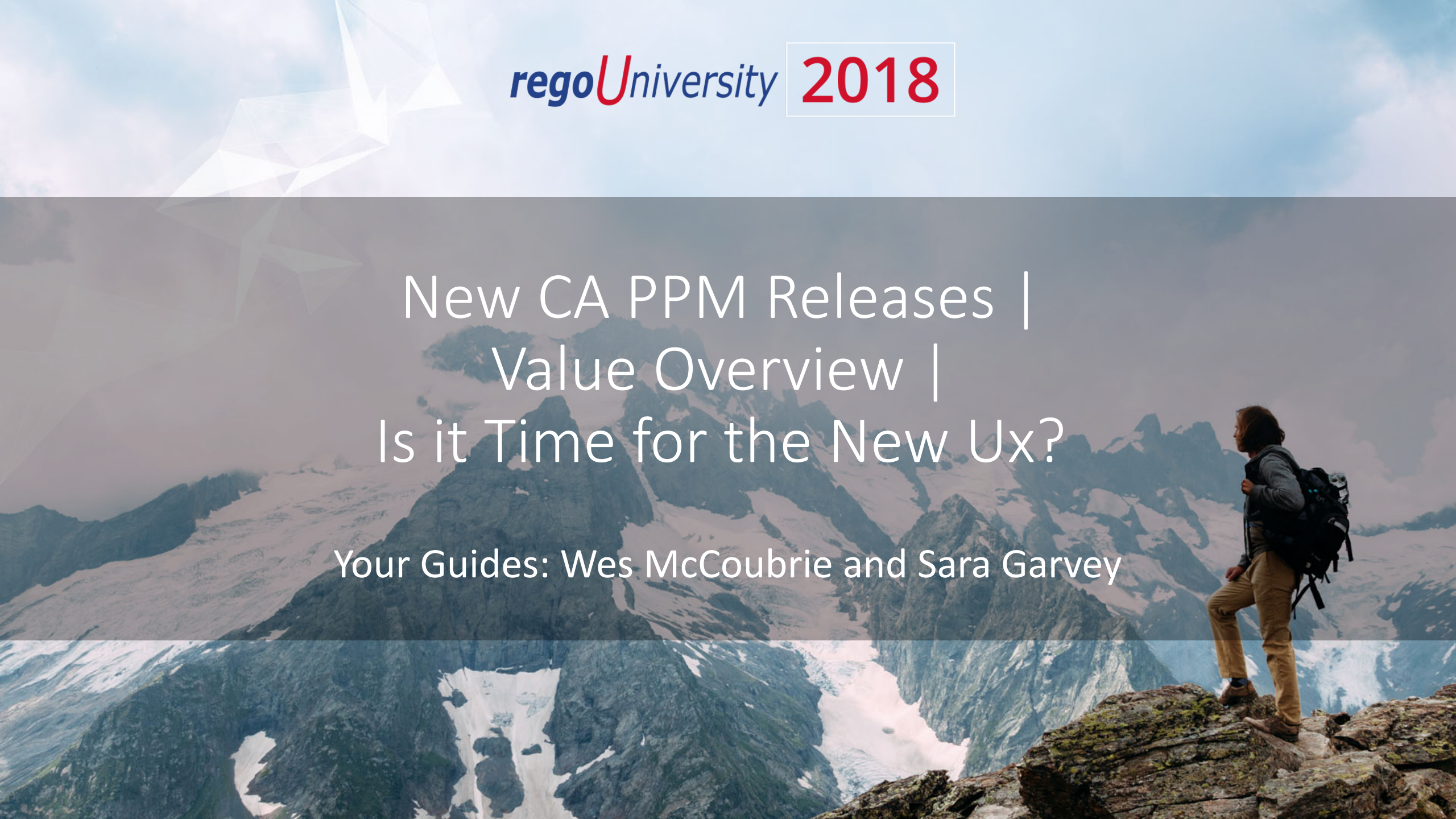
New CA PPM Releases | Value Overview | Is it Time for the New Ux?



Your Guides: Wes McCoubrie and Sara Garvey

Introductions

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

Part I:
Enabling the New Ux

<Descriptor>

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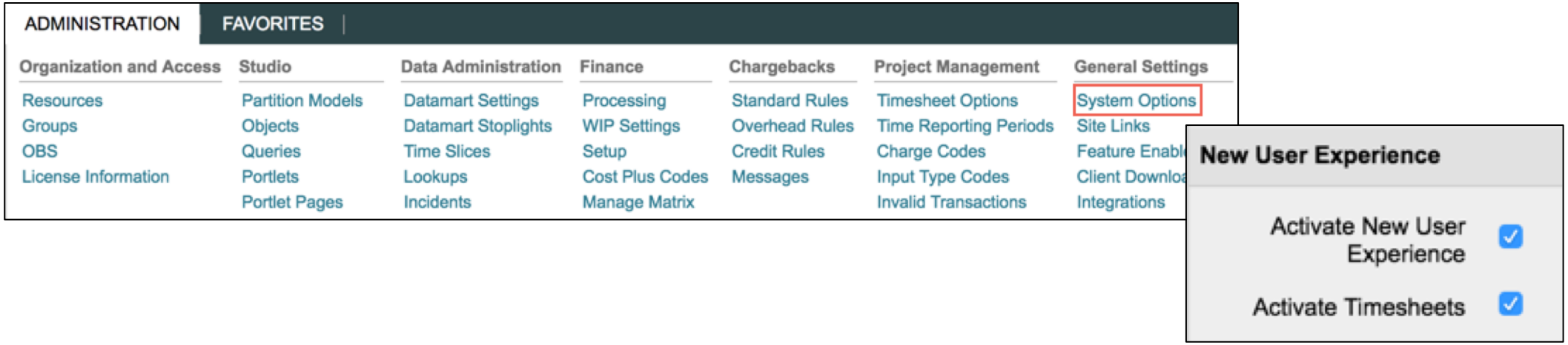
Let Rego be your guide.

Enable the New User Experience (New UX)

- The new user experience disabled by default
- Administrator must navigate to *System Options* in Classic to enable.



- *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
  - Example: https://cppm1234.ondemand.ca.com/pm
- Security rights dictate who can and can not access the New Ux, and Classic
  - Users can be restricted to accessing one or the other
- Classic PPM will always remain active and accessible

15.3 and Earlier

Features introduced in versions 15.3 and earlier

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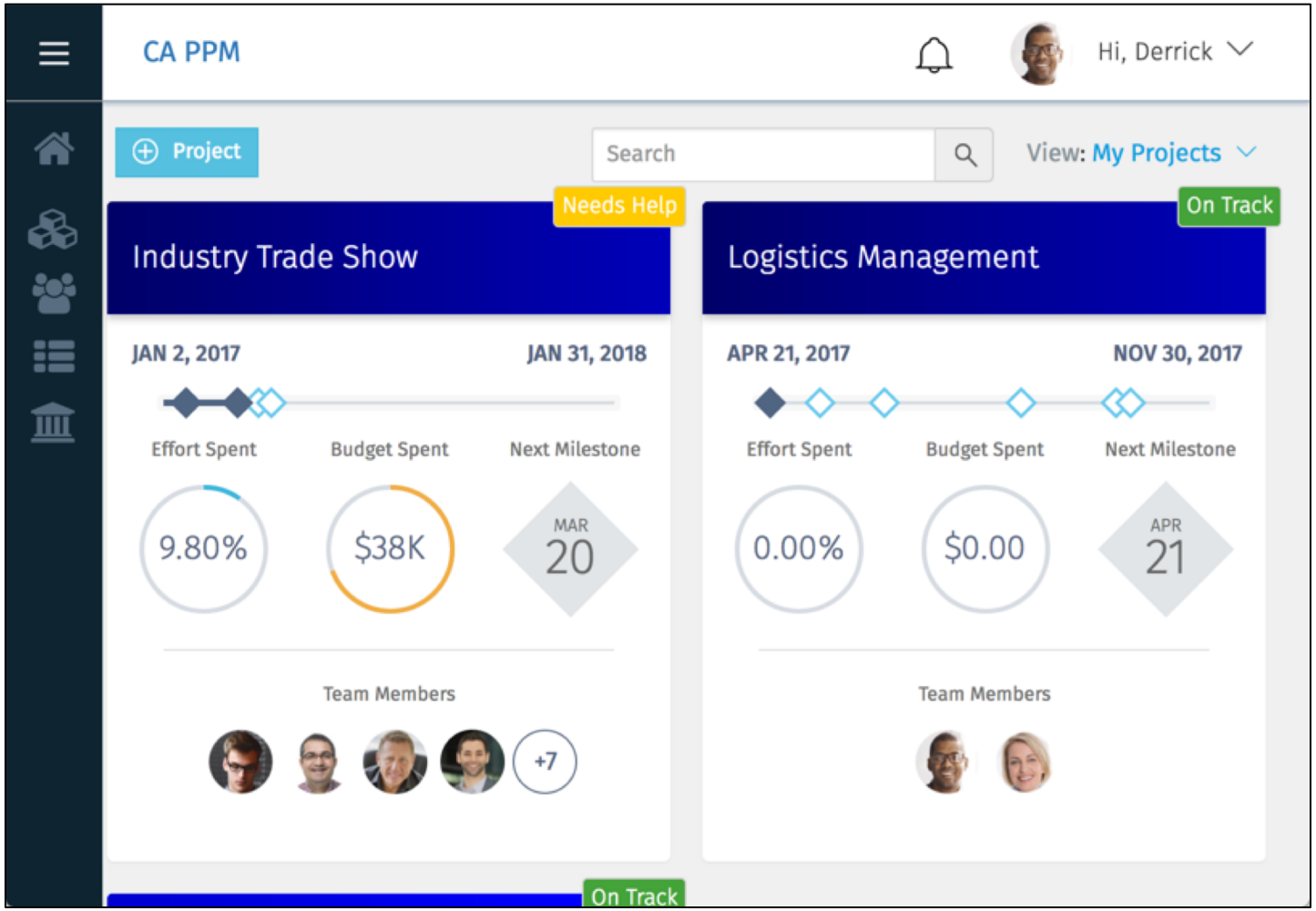
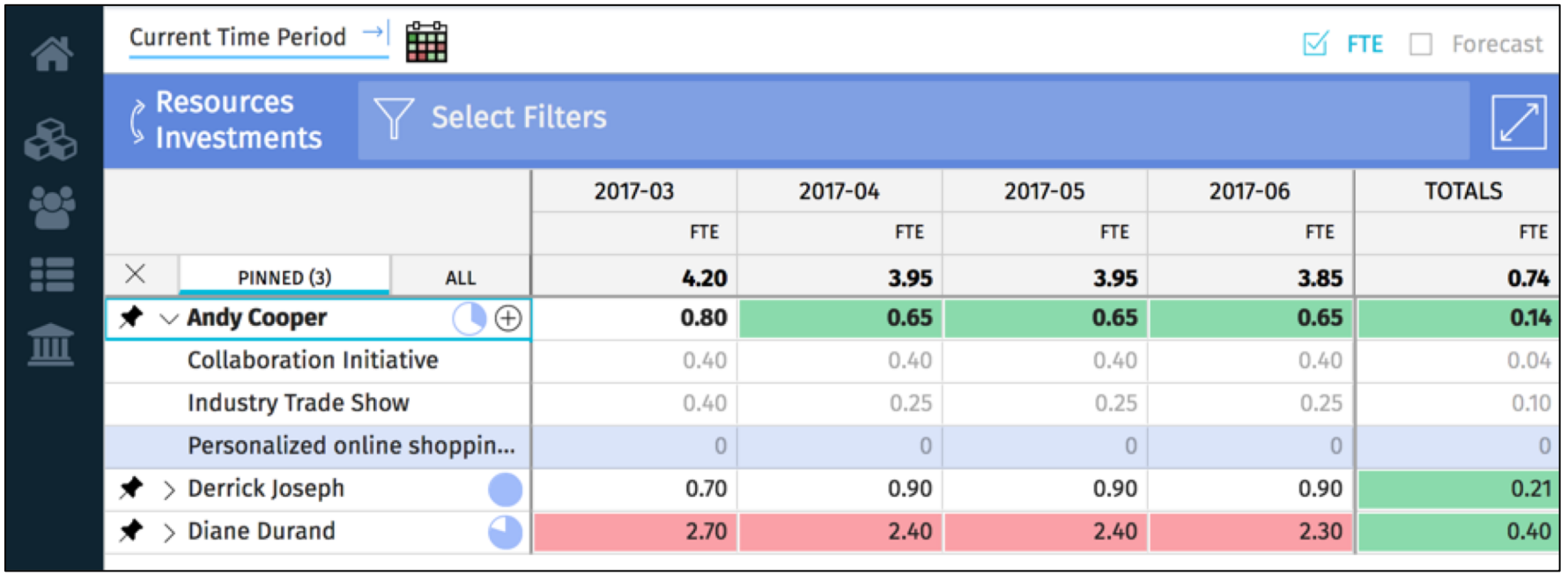
Project Management

- 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



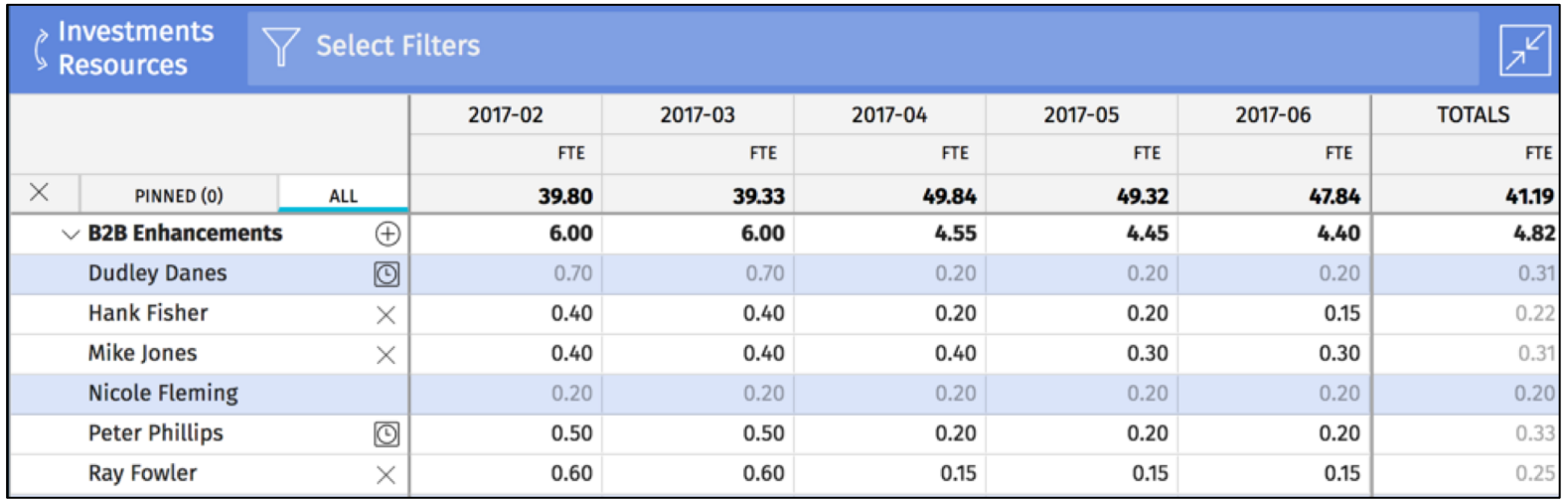
Resource Management (15.2)

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



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



	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) *

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)

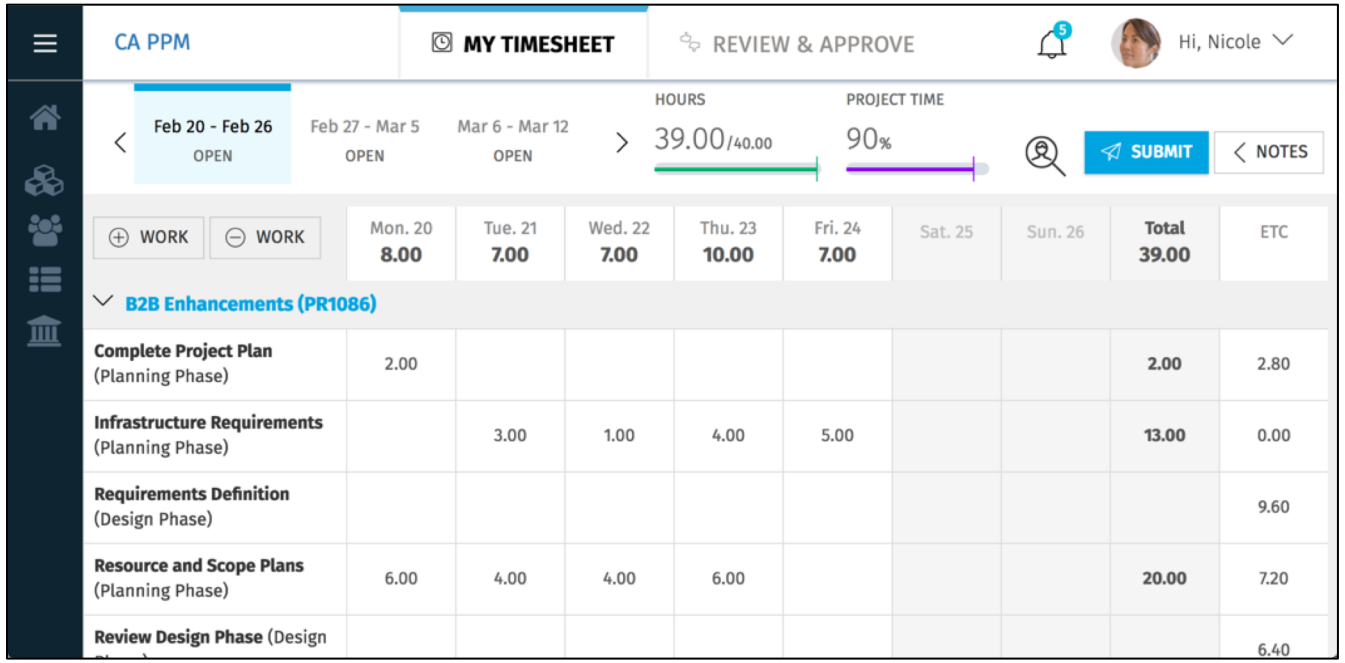
* Inactive color has precedence over Request Status color.

** Lock and Actuals icons have precedence over "X" icon.

*** For the Investment to Resource view, it only displays red for over-allocation

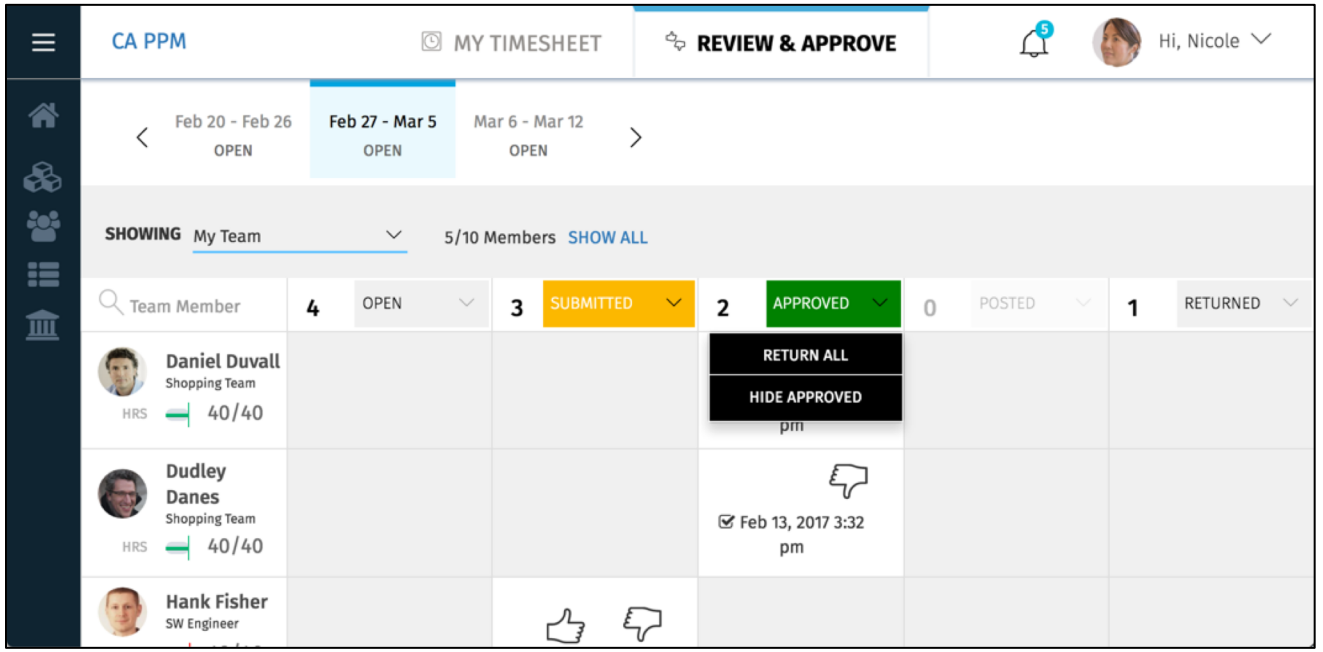
Submitting Timesheets

- 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)



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



Project Blueprints

- Configure/Customize portions of the project views
- Add Project Object attributes – OOTB or Custom – to the *Details* page

What's New in 15.4

New Features

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Almost.

General Changes

General Notes

- 15.4 is available now
- No Plan to drop Classic PPM
- What's New:
  - Enhanced Filtering (Still no Saved Filters)
  - Project Enhancements
  - Financial Enhancements
  - Roadmapping
- No longer support IE 11 for the New UX. Expected to drop support for Classic UX on IE11 at start of 2019.

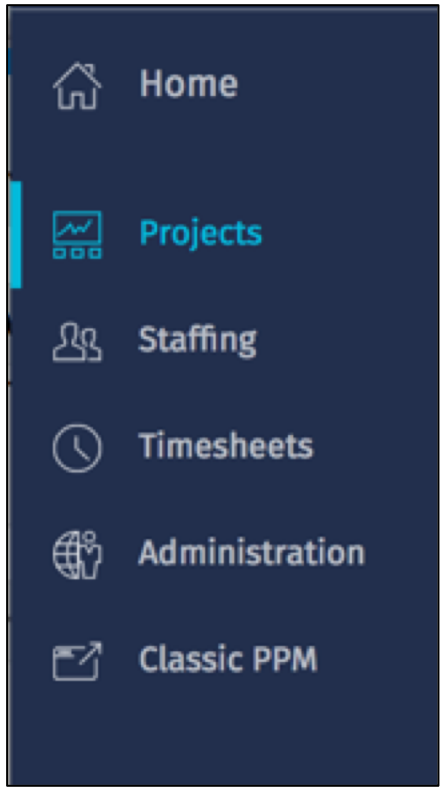
Changes in Classic UX

- Classic UX Changes:
  - Added several attributes to the DWH & Jaspersoft domains – financial status, % complete, WIP chargeable, task board data, roadmaps
  - Introduced new capability to trend on custom fields on investment and resource in the DWH – CA controls whether they trend OOTB attributes
  - Datamart extraction job allows a limited run for just OBS and/or calendar
  - Datawarehouse available as a data source within NSQL queries (for portlets)
  - New Version of Jaspersoft (6.4.2). 15.1 does not officially support Jaspersoft 6.4.2, but it should work. Running reports via Reports / Jobs output in 15.3 was limited to ppt or pdf output. In the new version, XLS is supported
  - Ability to have individual logins for oData access
  - The OOTB Agile Central Integration will allow bringing user story level detail into CA PPM for time entry
  - The Rate Matrix XOG will now allow incremental updates vs. having to replace the entire matrix
  - Introduced Export to CSV in portlets – in addition to Excel

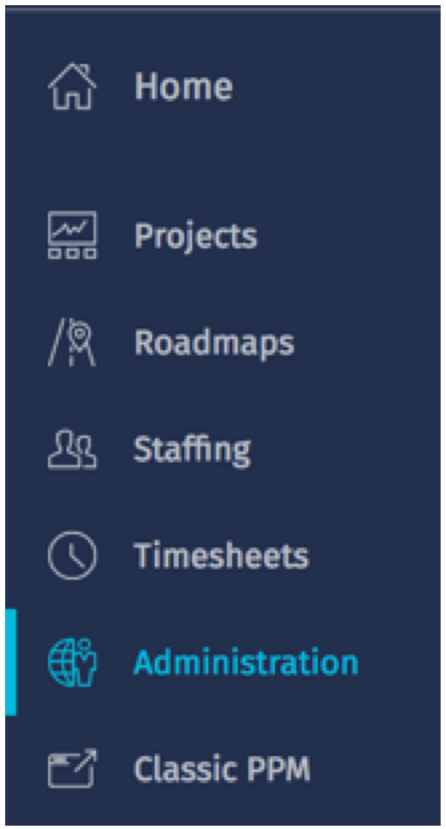
New Link in Navigation Pane

- A new *Roadmaps* link is available in 15.4.
- This functionality is covered at a high level in subsequent slides, and in detail in a separate course.

15.3



15.4



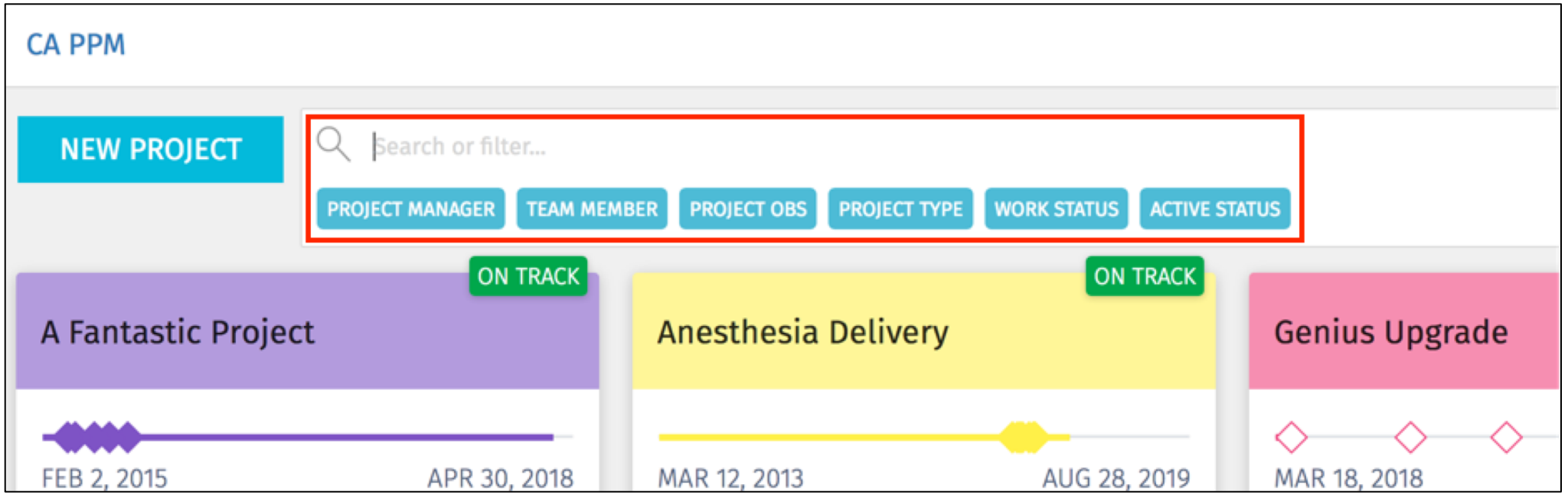
New Security Rights

- New security rights, related to the new UX, are available in 15.4:

Security Rights Related to the New UX		New in 15.4
General		
Classic PPM - Navigate	Allow access to Classic PPM from new PPM UI	
Blueprints		
Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.	
Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.	
Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.	
Blueprint - View - All	Allows user to view all Blueprints.	
Projects		
Project Management - Navigate	Allows user access to the project management pages in the new user experience. The user will only be able to view information for projects to which the user has access.	
Resource Management / Staffing		
Roadmap - Author - All	Allows the Roadmap Author to view, edit and delete the Roadmap and manage roadmap-specific picklists in the new user experience.	x
Roadmap - Create	Allows user to create Roadmaps in the new user experience. The creator of the Roadmap automatically becomes the Author and can edit or delete the Roadmap.	x
Roadmap - Delete - All	Allows user to view and delete all Roadmaps in the new user experience.	x
Roadmap - Edit - All	Allows user to view and edit all Roadmaps and manage roadmap-specific picklists in the new user experience.	x
Roadmap - Navigate	Allows user access to the Roadmap pages in the new user experience. The user will only be able to view information for Roadmaps to which the user has access.	x
Roadmap - View - All	Allows user to view all Roadmaps in the new user experience.	x
Resource Management / Staffing		
Staffing - Navigate	Allows user access to the resource staffing pages in the new user experience. The user will only be able to view staffing information for resources to which the user has access.	
Resource Forecast Rate - Edit	Allows user to view resource forecast column in Staffing grids and edit forecast rate in flyout in the new user experience. Includes Resource Forecast Rate - View right.	
Resource Forecast Rate - View	Allows user to view resource forecast column in Staffing grids and forecast rate in flyout in the new user experience.	

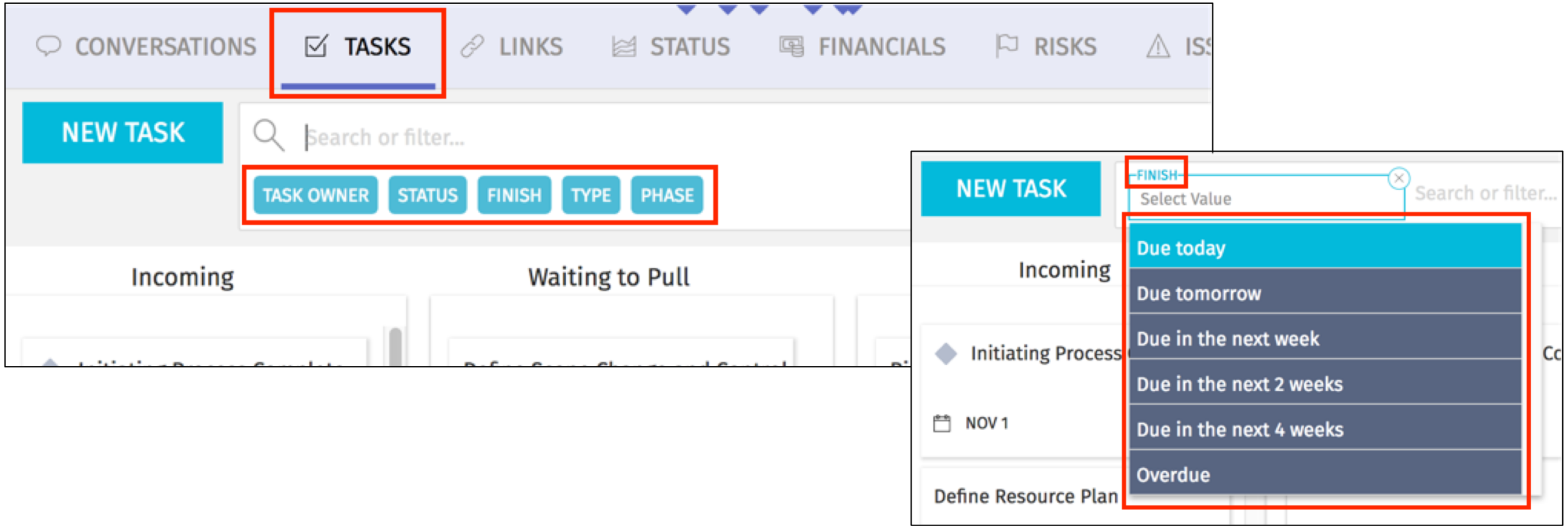
Enhanced Filtering (1)

- Additional filter options now available on the Project View.
- OBS (and others) are multi-select.



Enhanced Filtering (2)

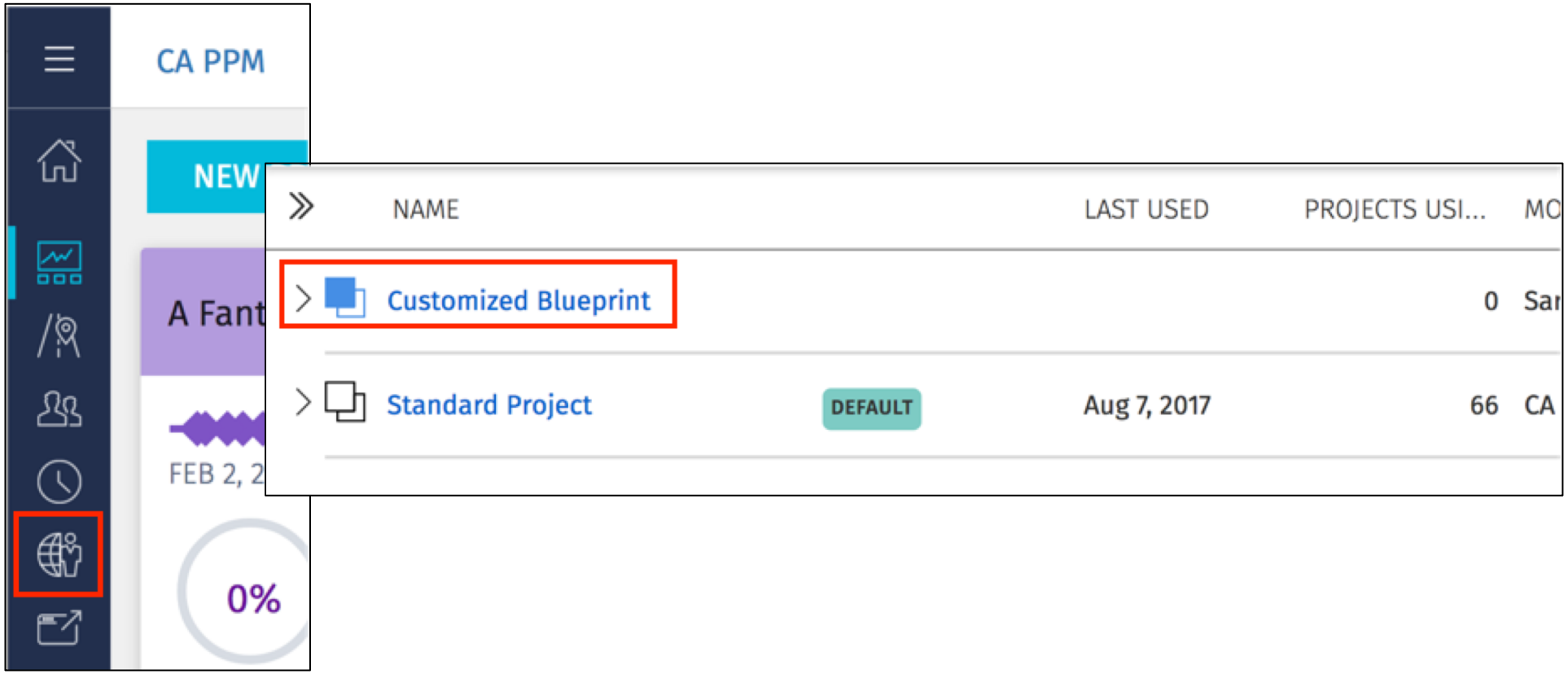
- Additional filter options now available on the Task view.
- Finish filter has set list of options.



Blueprint Changes

Blueprint Changes (1)

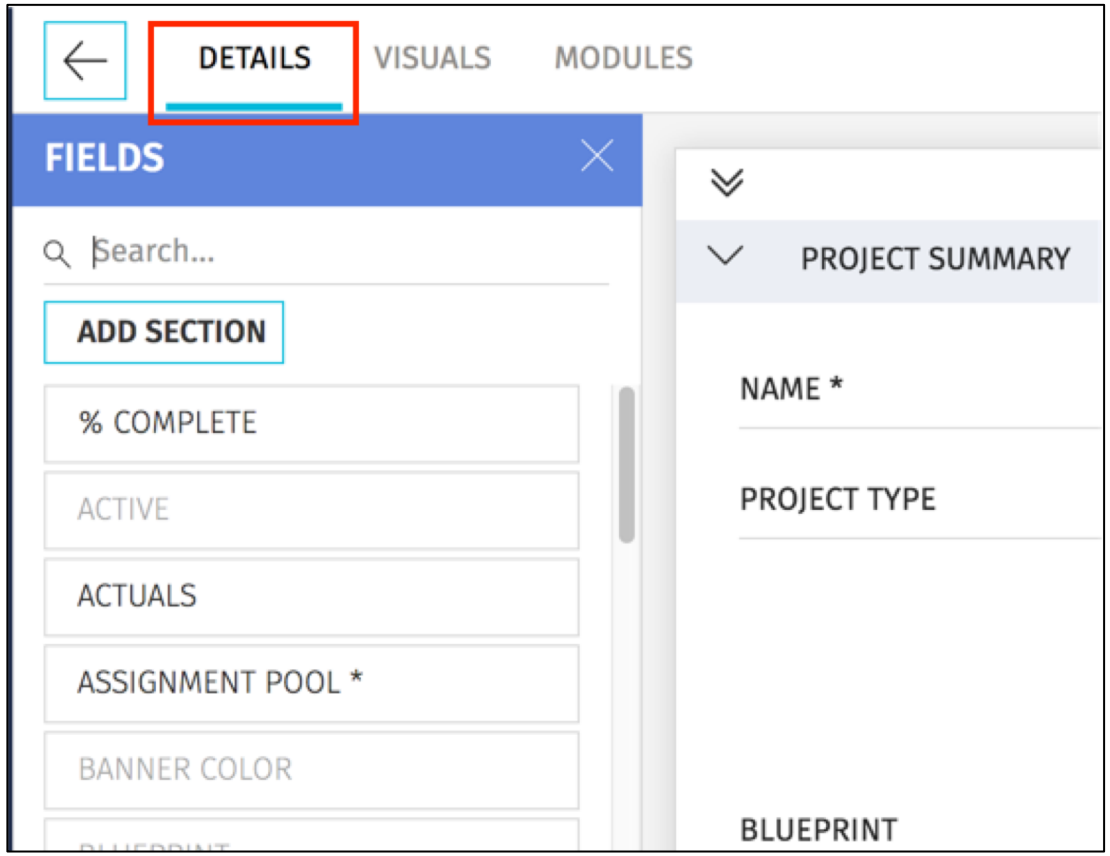
- Additional project configuration is available via the blueprint.



Blueprint Changes (2)

Modify the blueprint to customize the following:

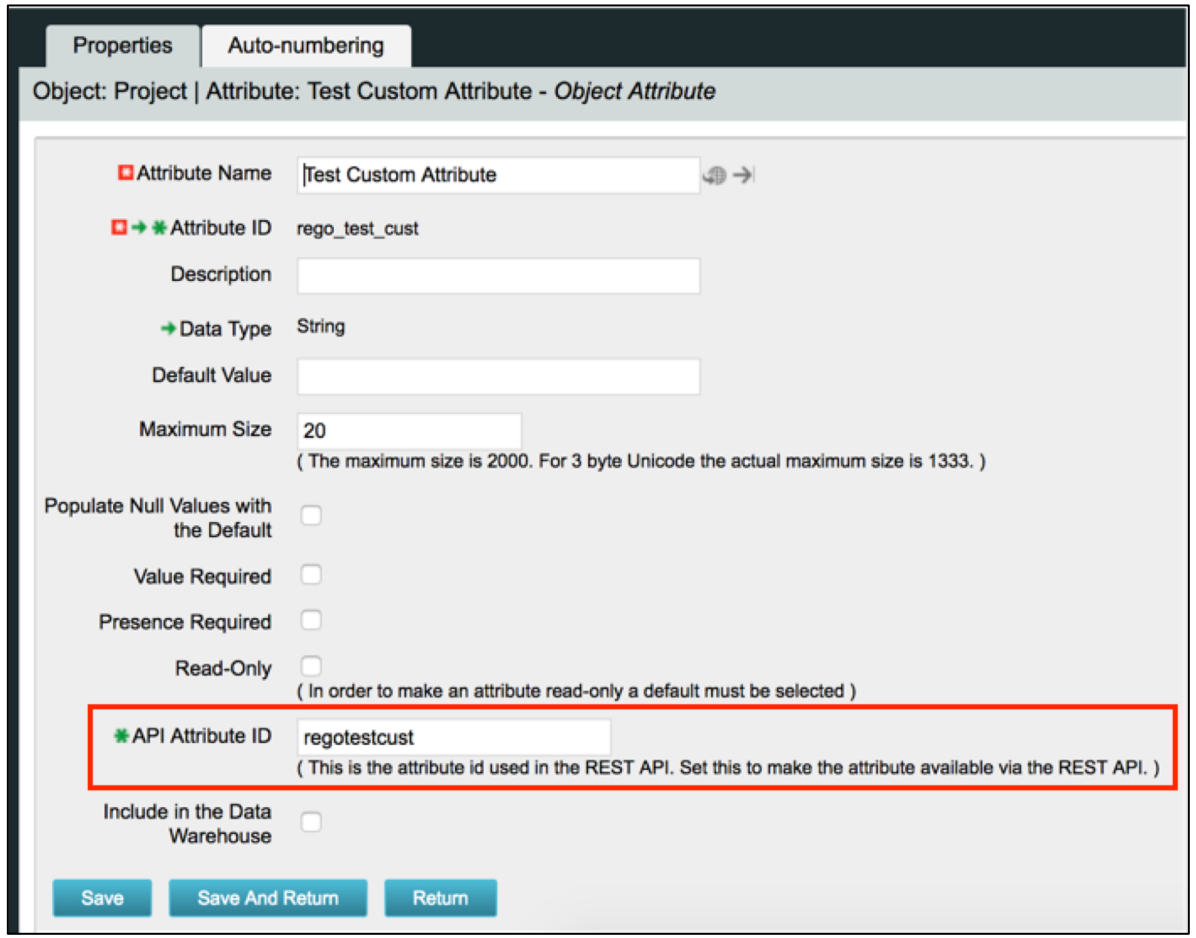
1. **<u>Details (project edit screen)</u>**:
   - No significant changes from previous version.
   - OBS may now be added to view, and edited within the project.
   - The following limitations still apply:
     - No project subobjects
     - No detailed WBS (more than 2 levels)
     - Certain Investment/Project attributes can not be added to view



Blueprint Changes (3)

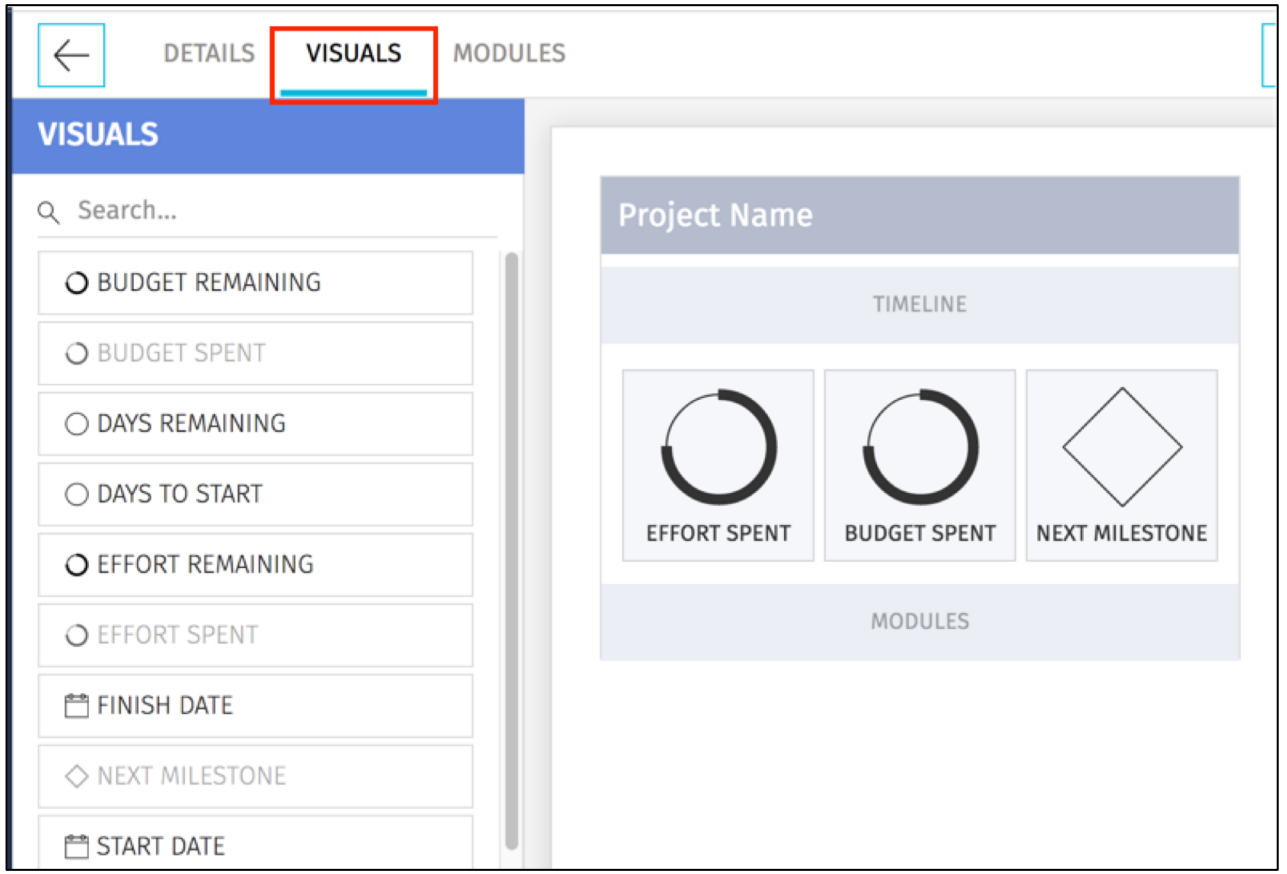
Note: In order for custom fields (or any fields) to be able to be added to the *Details* page, an **API Attribute ID** must be populated for the attribute.

- These attribute data types can not be added to view on the blueprints *Fields* list:
  - Custom time-scaled value (TSV)
  - Attachment
  - URL
- Additionally, certain project attributes may not be configured into view. Read here for more information.



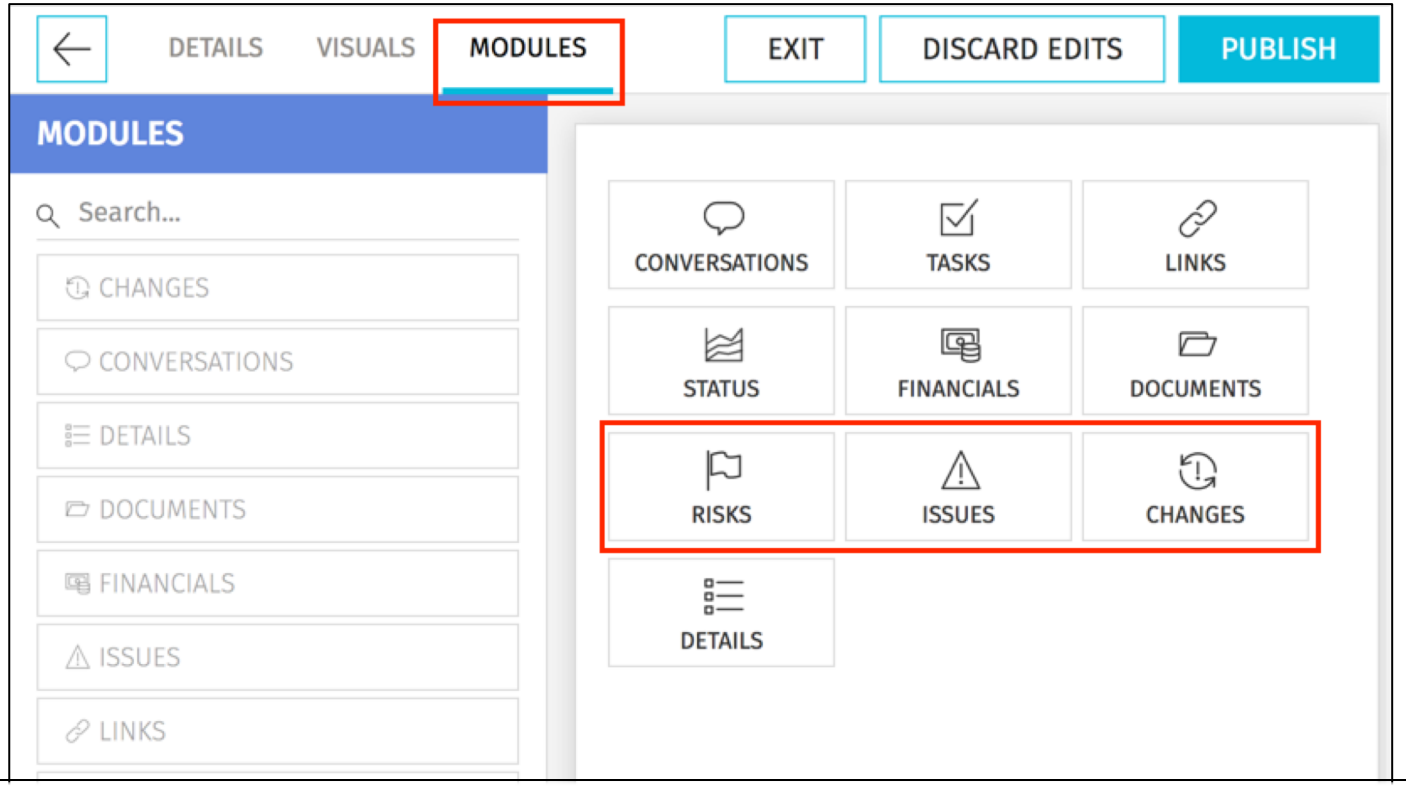
Blueprint Changes (4)

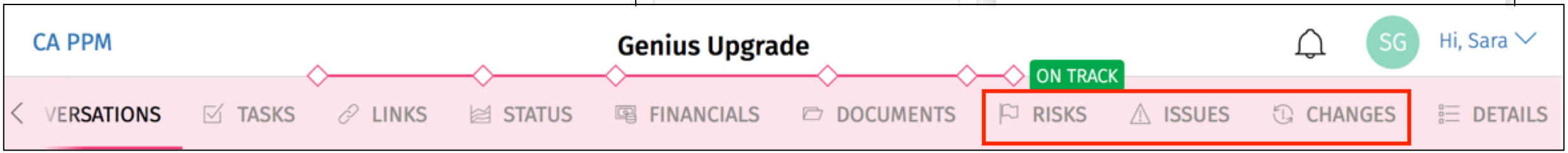
2. **Visuals**:
   - No changes



Blueprint Changes (5)

3. **Modules**:
   - Risks, Issues and Changes now available as modules. Can select all 3 to be included in blueprint, or include only those applicable to the project type.
   - These modules will be covered in later sections

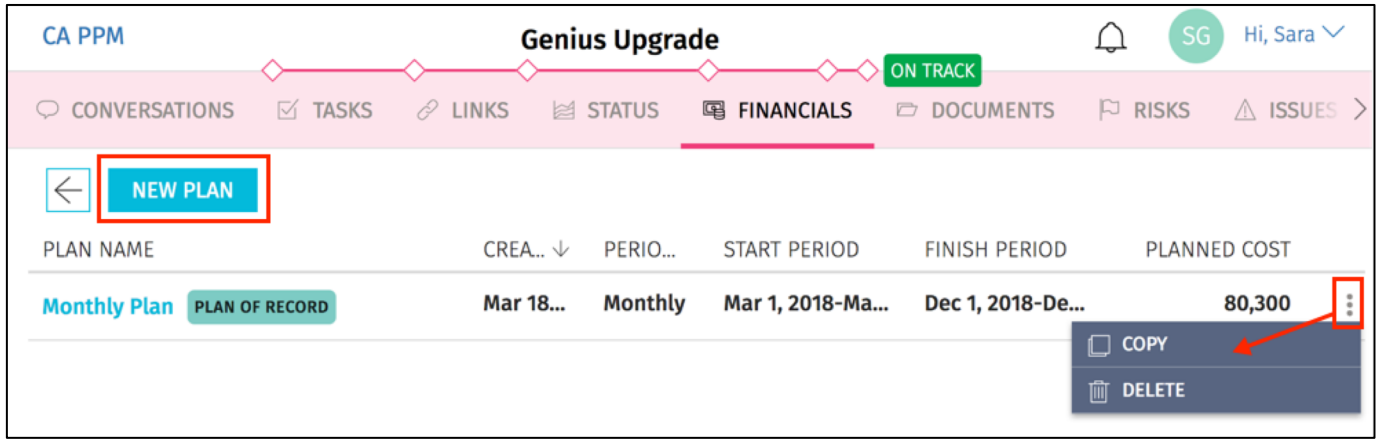


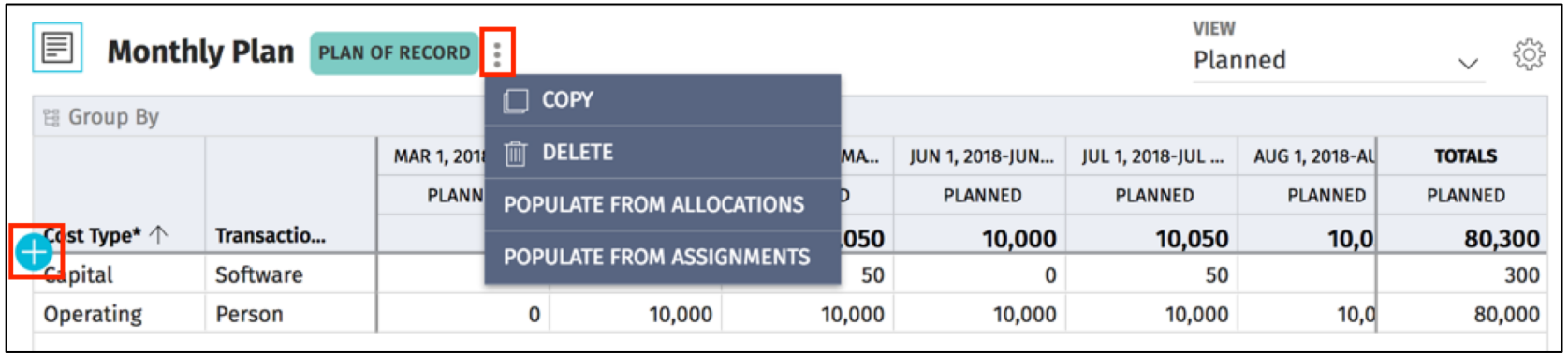


Financials Changes

Cost Plans Now Editable

- Can now create, edit and delete Cost Plans
- Can create manually (manually add rows), or create/update from Task Assignments or Resource Allocations
- Sill no Budget or Benefit Plan view/edit
- No multi-currency support

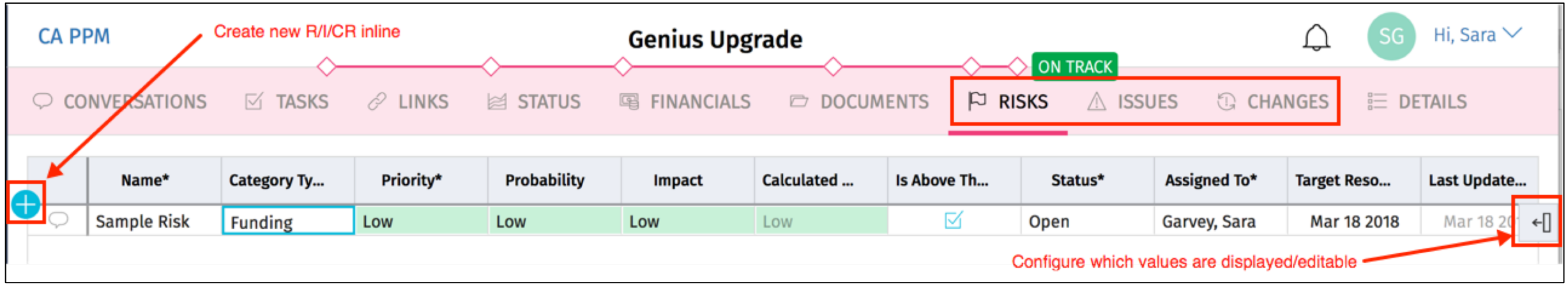




Project/Task Changes

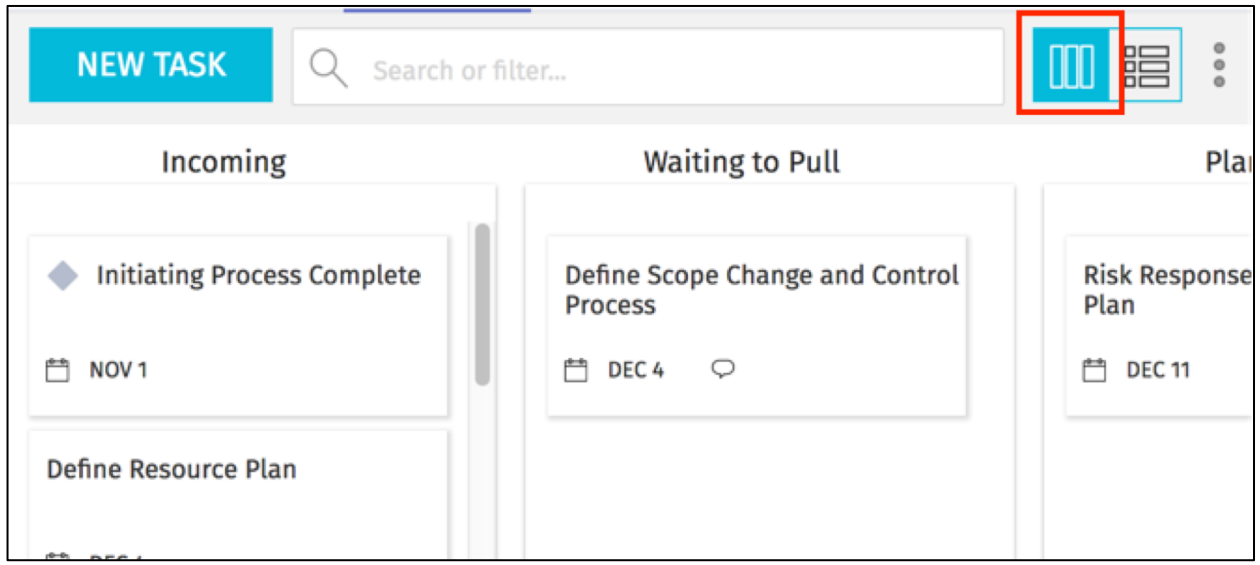
Risks, Issues, Changes Now Available on Project

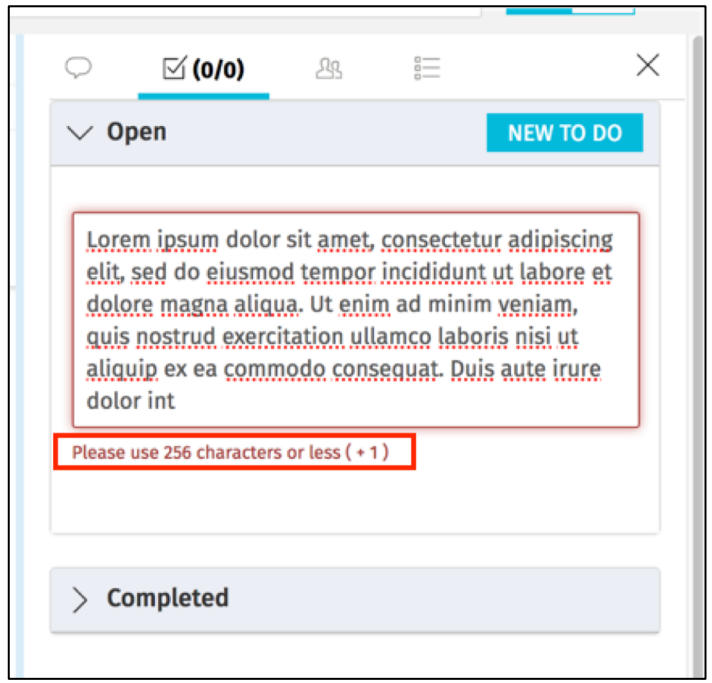
- Risks, Issues and/or changes may be viewed and edited on the Project
- Choose which of the 3 will be displayed via the blueprint
- Can create and edit inline, but no form view
- Can configure which fields to display user by user, but may not be edited via the blueprint
- Can have conversations related to issues, risks, or changes
- Can view open and closed R/I/CR



Tasks Changes

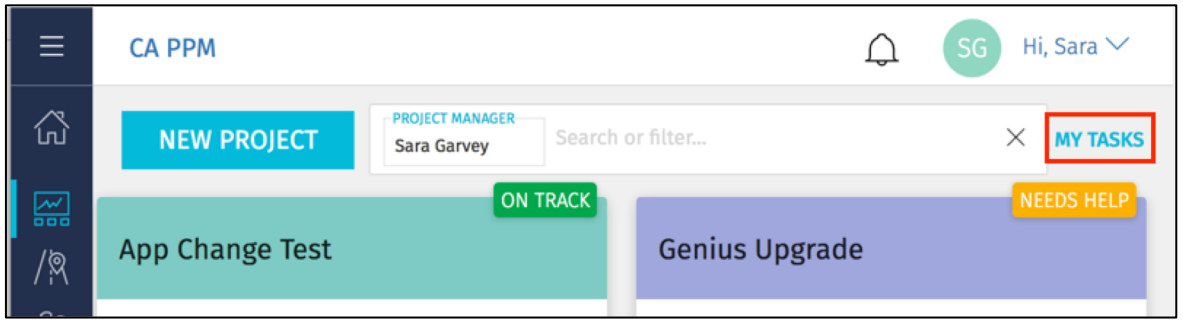
- Board View now the default task view (as opposed to List View)
- Longer To Dos: To Do character limit increased from 80 to 256 characters.

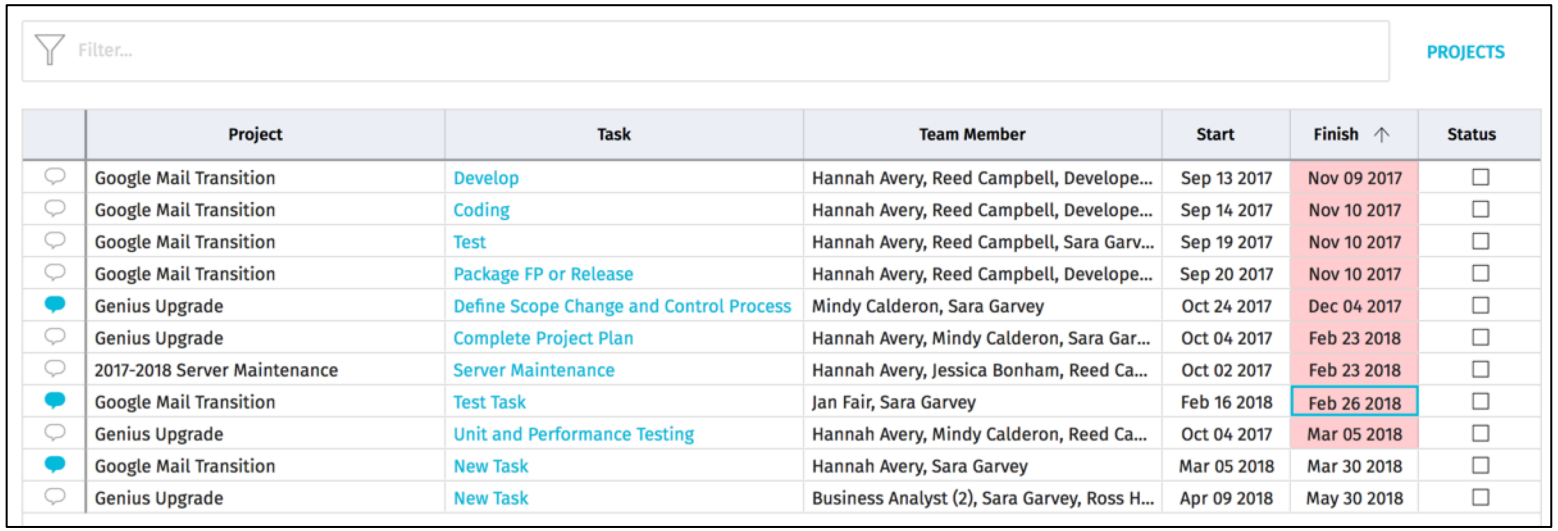




My Tasks View

- New *My Tasks* view available on home page
- Displays tasks to which the logged in user is assigned across projects
- Can click to edit task, or mark task complete
- Highlighting indicates overdue tasks
- Click the *Projects* link in the upper right to navigate back to the Project Tile view



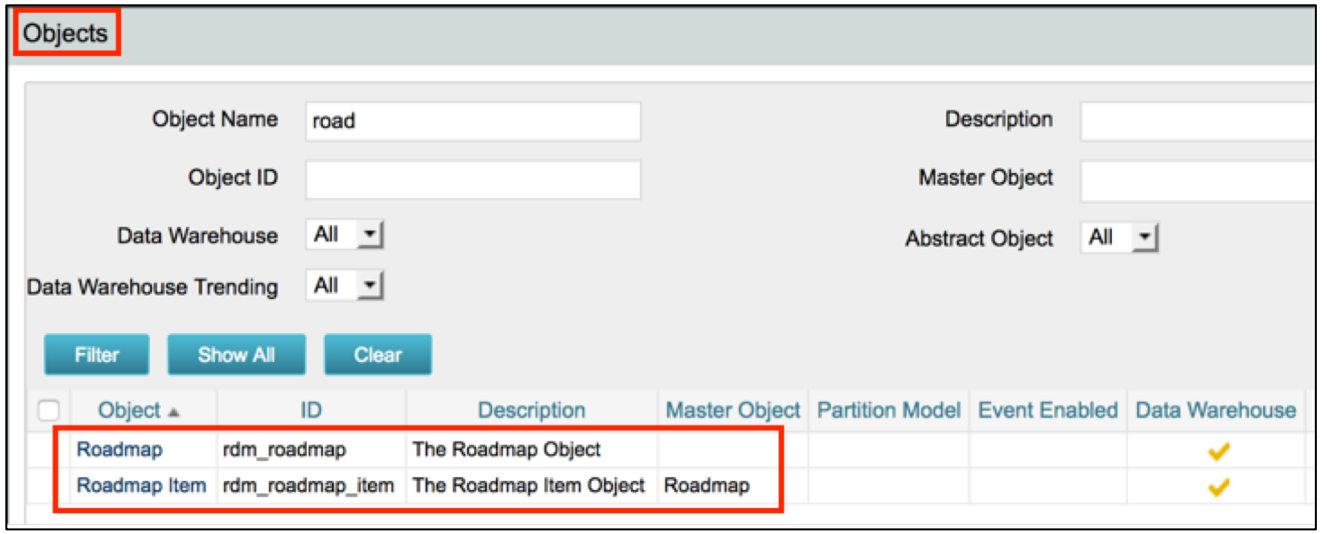


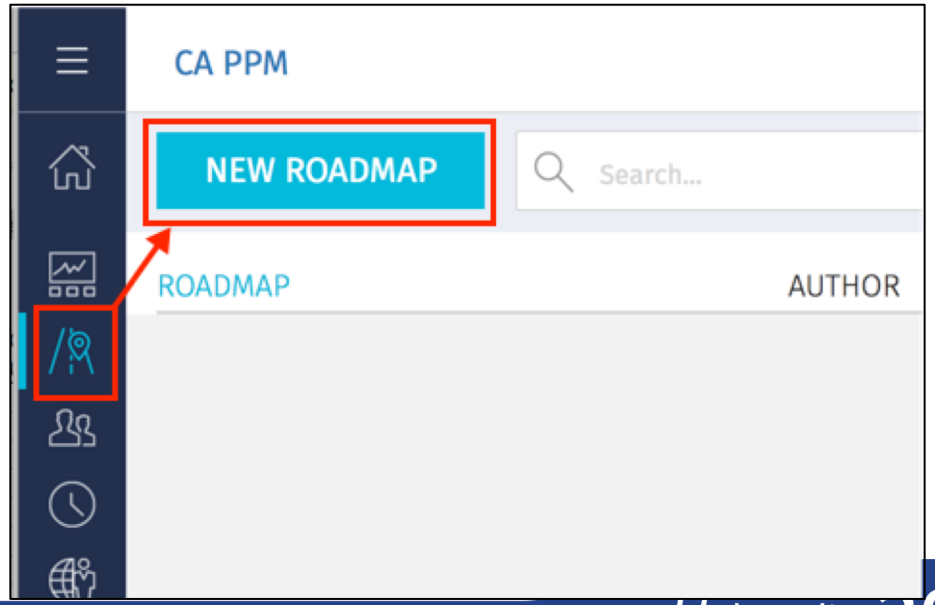
	Project	Task	Team Member	Start	Finish	Status
	Google Mail Transition	Develop	Hannah Avery, Reed Campbell, Develope...	Sep 13 2017	Nov 09 2017	
	Google Mail Transition	Coding	Hannah Avery, Reed Campbell, Develope...	Sep 14 2017	Nov 10 2017	
	Google Mail Transition	Test	Hannah Avery, Reed Campbell, Sara Garv...	Sep 19 2017	Nov 10 2017	
	Google Mail Transition	Package FP or Release	Hannah Avery, Reed Campbell, Develope...	Sep 20 2017	Nov 10 2017	
	Genius Upgrade	Define Scope Change and Control Process	Mindy Calderon, Sara Garvey	Oct 24 2017	Dec 04 2017	
	Genius Upgrade	Complete Project Plan	Hannah Avery, Mindy Calderon, Sara Gar...	Oct 04 2017	Feb 23 2018	
	2017-2018 Server Maintenance	Server Maintenance	Hannah Avery, Jessica Bonham, Reed Ca...	Oct 02 2017	Feb 23 2018	
	Google Mail Transition	Test Task	Jan Fair, Sara Garvey	Feb 16 2018	Feb 26 2018	
	Genius Upgrade	Unit and Performance Testing	Hannah Avery, Mindy Calderon, Reed Ca...	Oct 04 2017	Mar 05 2018	
	Google Mail Transition	New Task	Hannah Avery, Sara Garvey	Mar 05 2018	Mar 30 2018	
	Genius Upgrade	New Task	Business Analyst (2), Sara Garvey, Ross H...	Apr 09 2018	May 30 2018	

Roadmaps

Roadmaps Overview (1)

- Roadmaps are covered in detail in a separate course
- Two new objects introduced in 15.4
  - Roadmap
  - Roadmap Item
- Objects are only viewable in New UX, but can only be configured in Classic UX
- Replacement for Portfolios in New UX



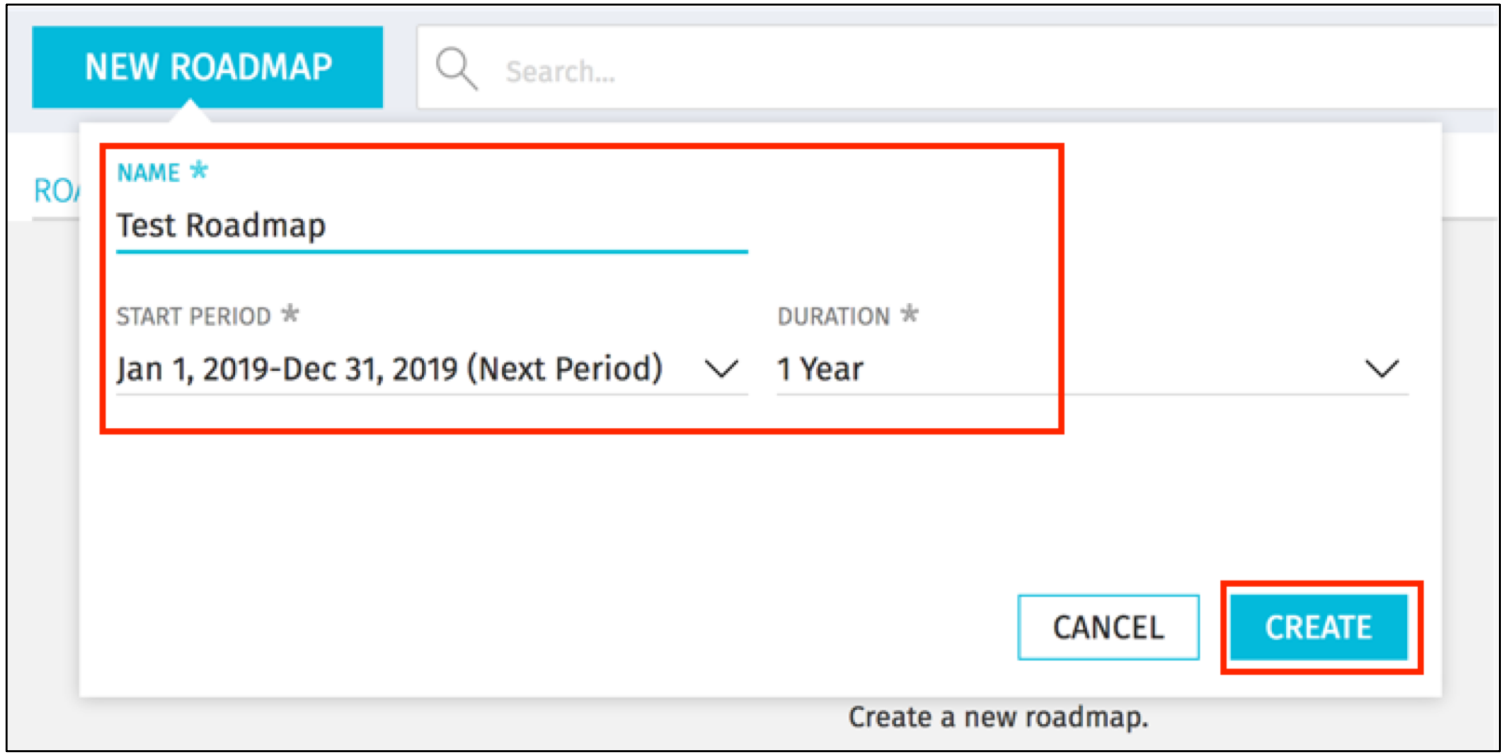


Roadmaps Overview (2)

- **Roadmaps are not tied to Projects, Ideas, etc, and can not be synchronized with Projects/Ideas – they are entirely separate objects.**
- Fiscal Period based – based on system base entity
- Supports view by yearly, monthly and quarterly fiscal periods.
- Can change zoom level, periods
- Can change what swimlanes are organized by – stakeholder, outcome, etc.
- Can import data from CSV to Roadmap

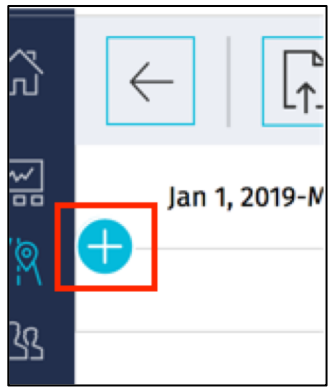
Create New Roadmap

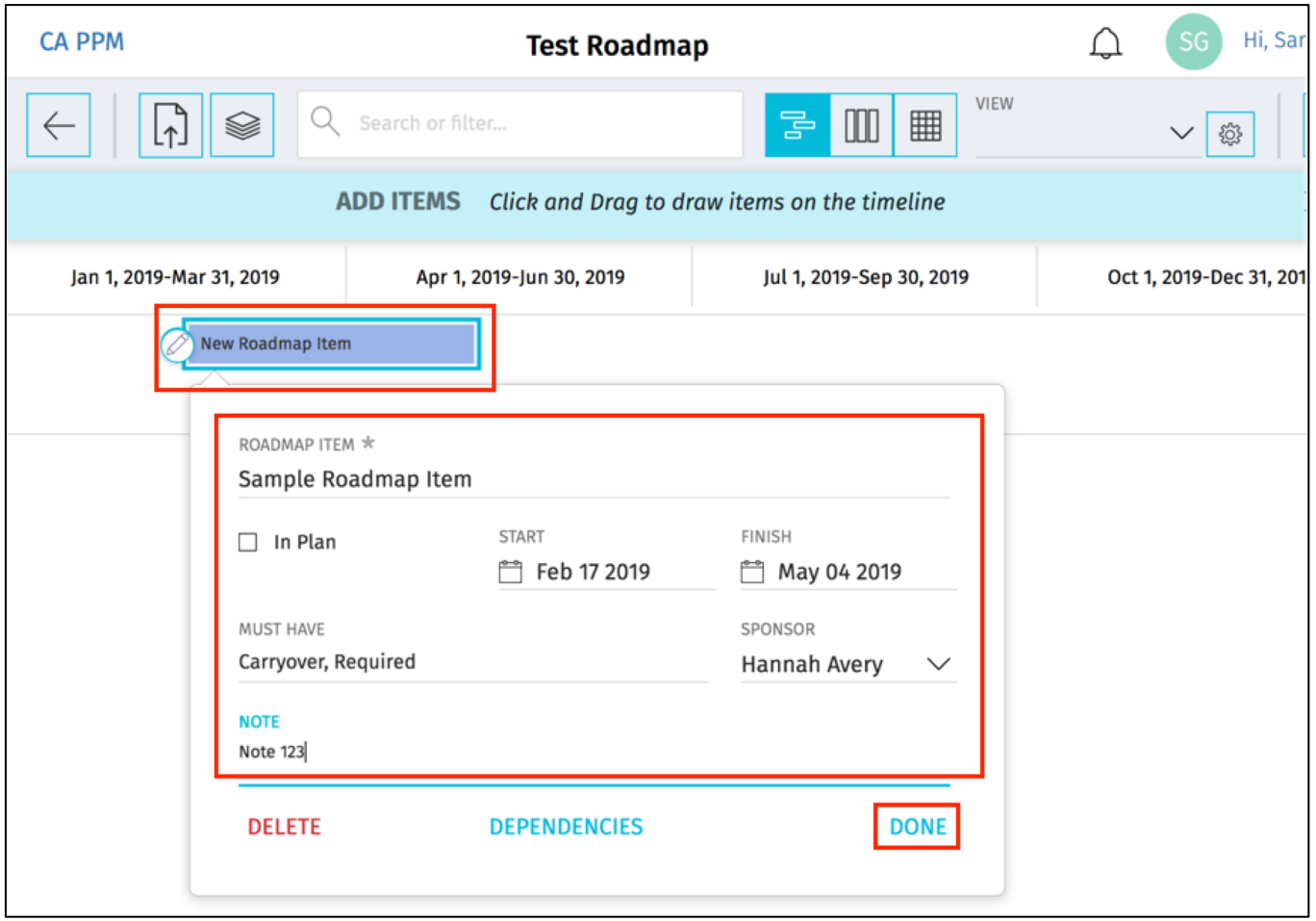
- Set Roadmap:
  - Name
  - Start Period (typically, roadmaps would be created for the coming year)
  - Duration



Create New Roadmap Item

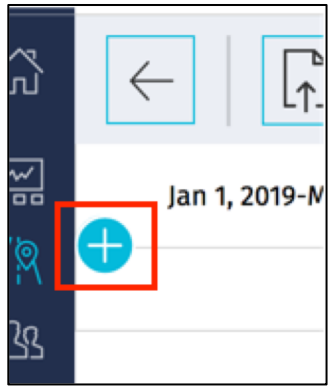
- Click the plus in the upper left, then click and drag to create new items on the roadmap

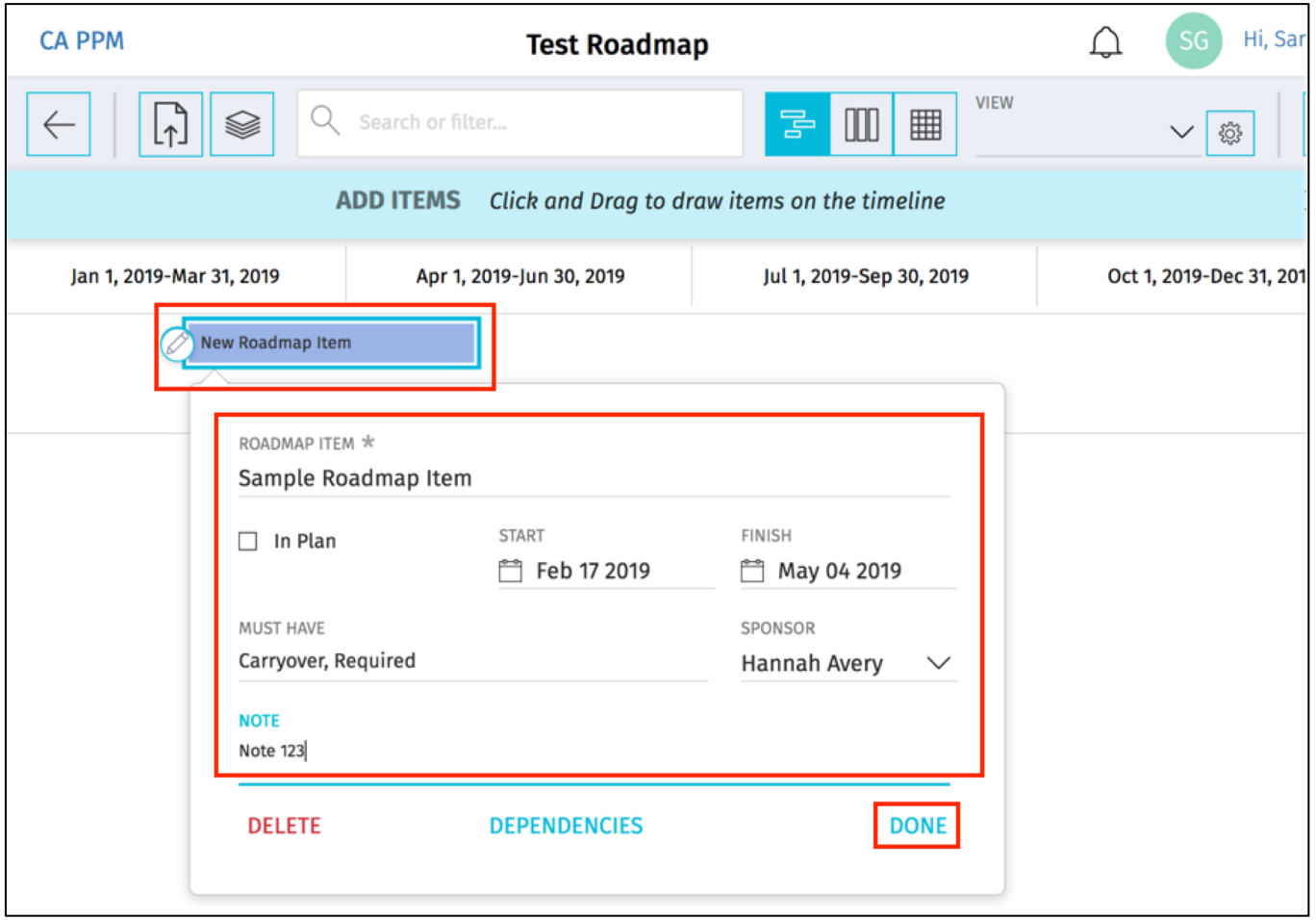




Roadmap Settings

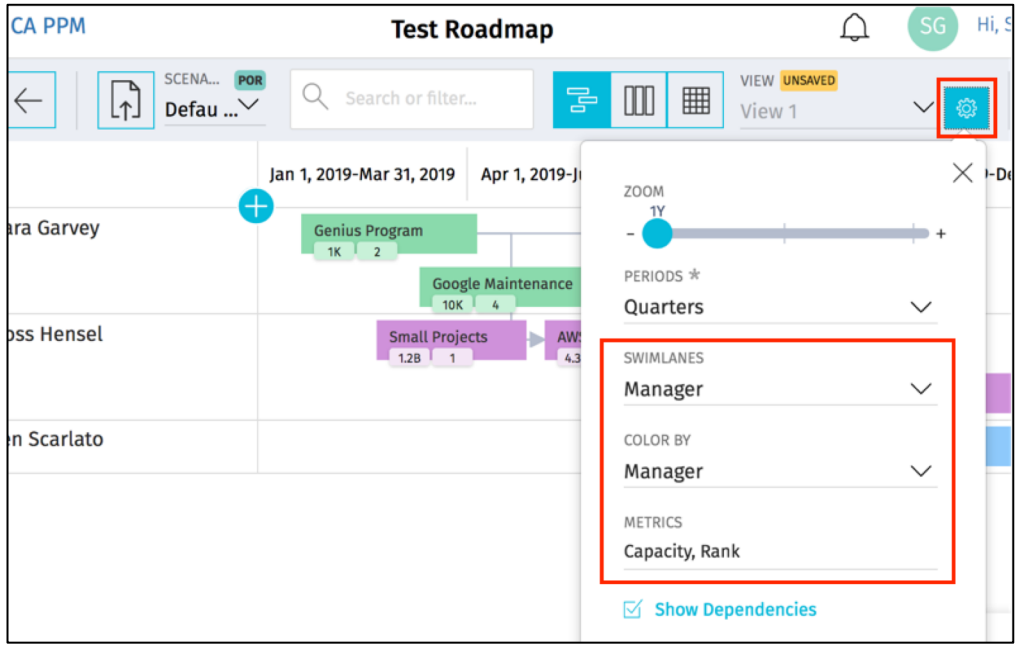
- Click the plus in the upper left, then click and drag to create new items on the roadmap

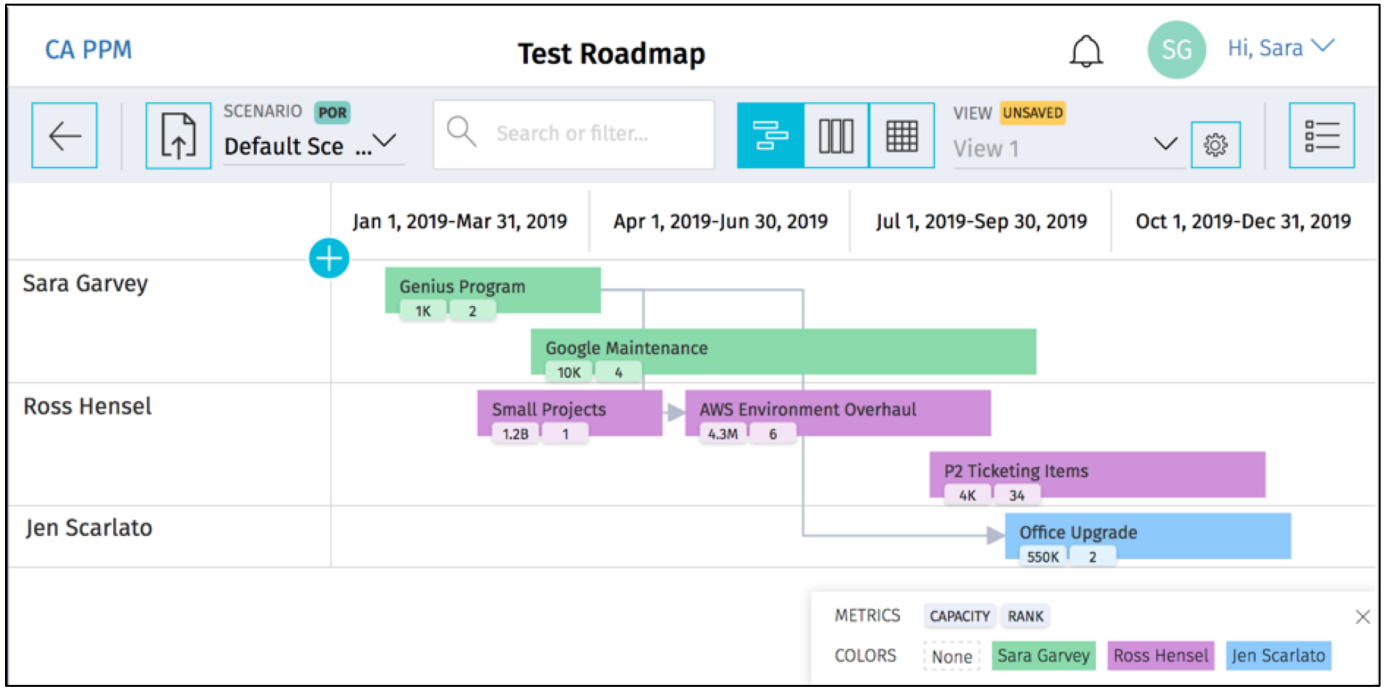




Roadmap Options (1)

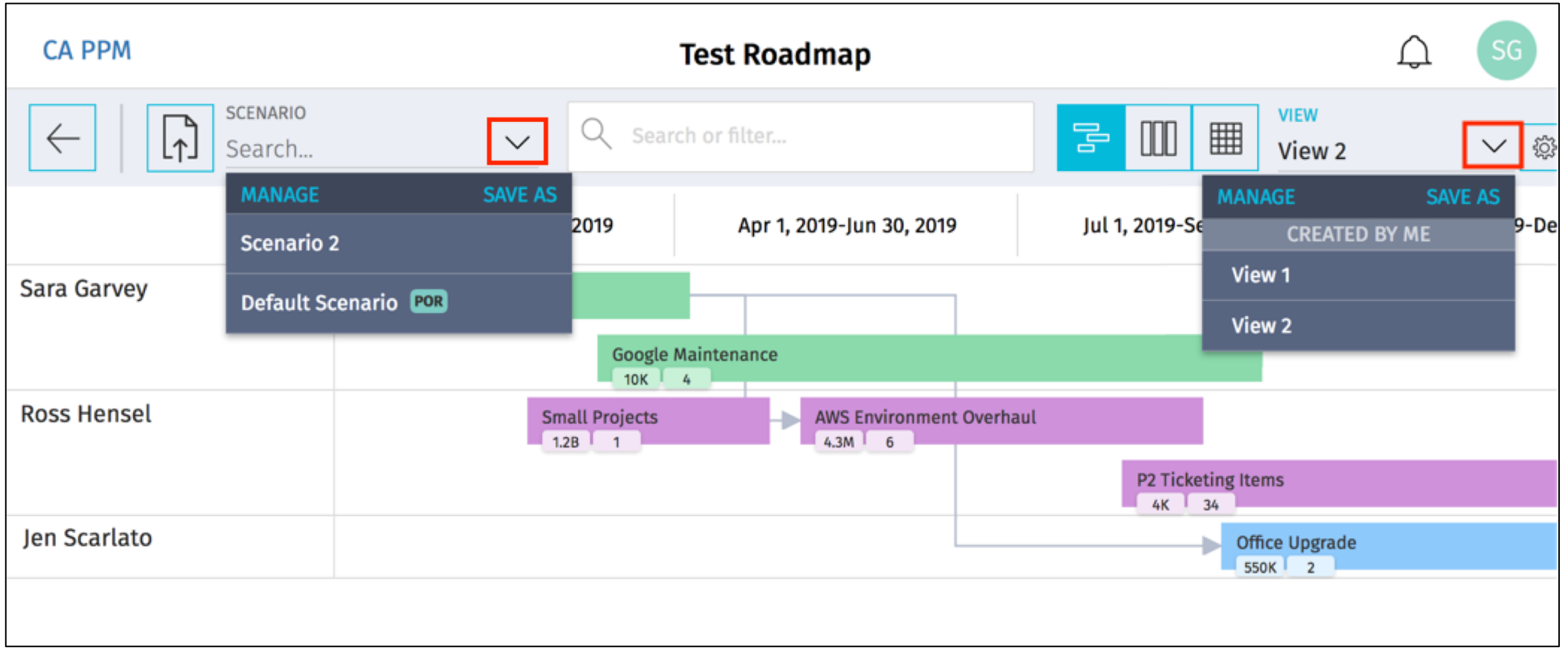
- Can add groupings, swimlanes, coloring and metrics
  - Metrics display on Gantt bars, and can only be number/money fields





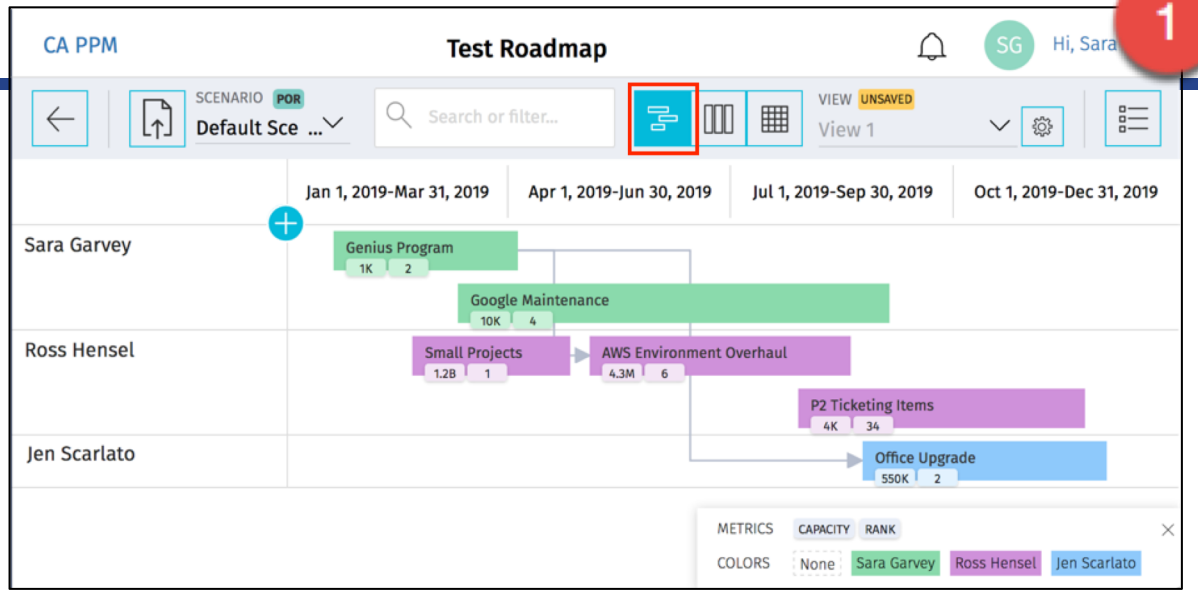
Roadmap Options (2)

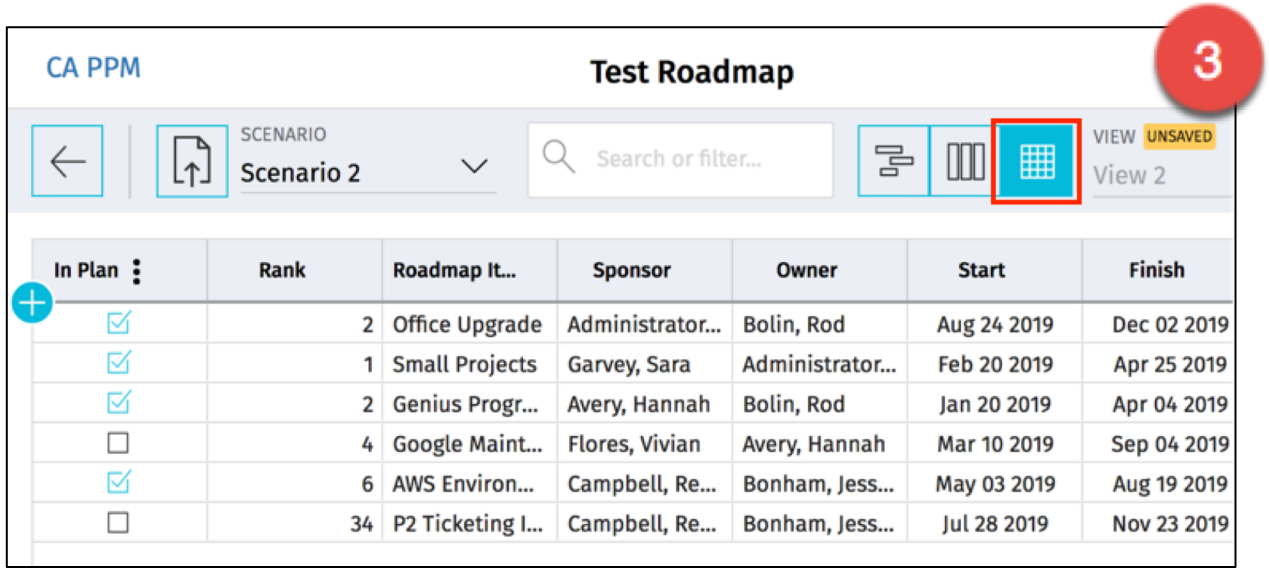
- Can create Scenarios and Views to differentiate options within the Roadmap

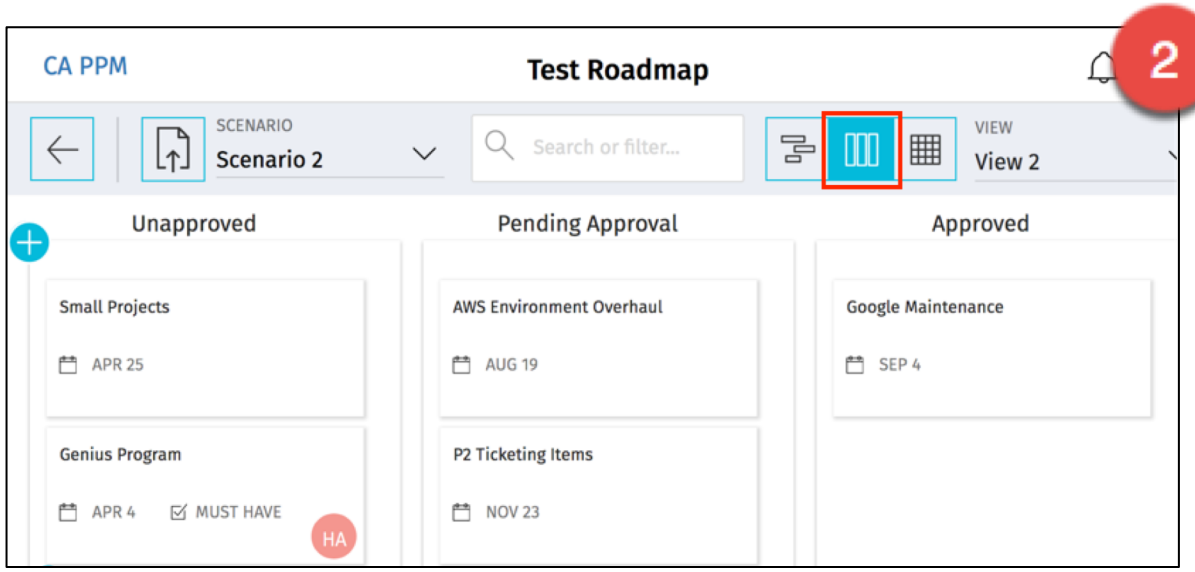


Roadmap Views

- 3 Roadmap Views:
  1. Timeline
  2. Board
  3. Grid
- Can add items and edit in all 3 views

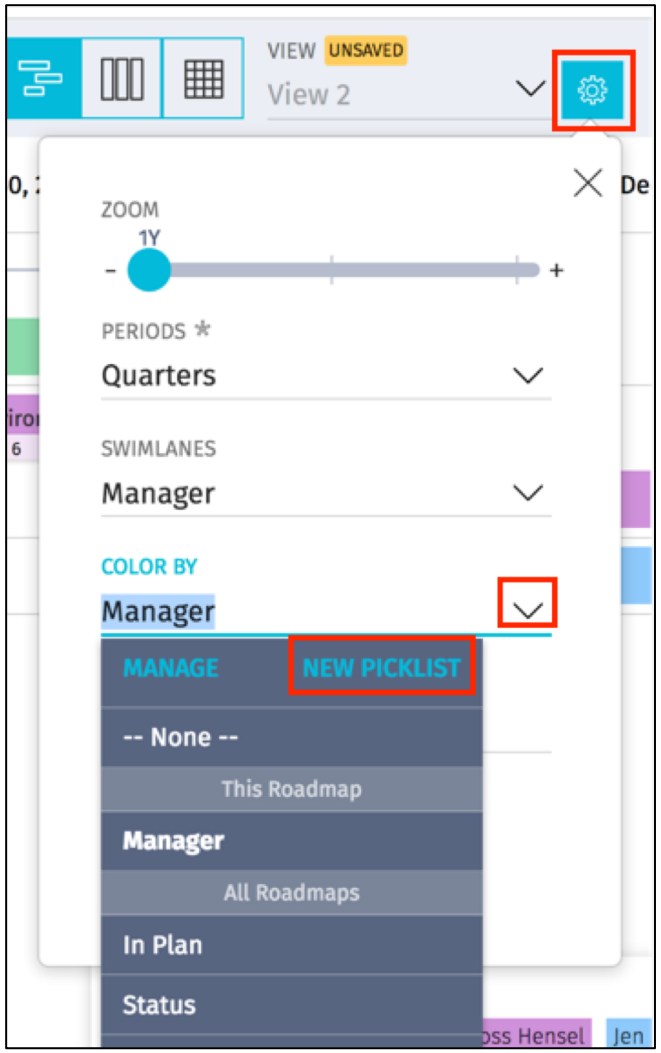






Roadmap Custom Picklists

- Can create custom picklists within a roadmap
- Custom picklist created within a roadmap is only available to that one roadmap – they are not shared across roadmaps



Differences Between Classic and Modern UX

Key Differences Between Classic and Modern UX (1)

	Classic	15.1	15.2	15.3	15.4
General					
Studio object configuration (create custom fields)					
OBS based and Multi-select filtering					
Time					
Submit timesheets for others (timesheets cannot be enabled in both Classic and New UX)					
View detail of approved/posted timesheets			Only in time entry/ search view	Only in time entry/ search view	
Drill into task or project from timesheet to update % complete or other fields on the object					
Resource Management					
Allows mixed booking					
Utilize Resource Manager assignment for role replacement					
Allows segmented allocation					
Multi resource replacement (1 role filled by many resources)					
Can add roles to projects and edit Resource allocations from within project				Possible in staffing views only – not in project	

Key Differences Between Classic and Modern UX (2)

	Classic	15.1	15.2	15.3	15.4
Project - General					
Can edit project OBS					
Supports Sub-Objects and Sub-Pages					
Supports Risks, Issues, Changes					
View/update project detailed fields (edit screen)					
Project - Tasks					
Team members may edit WBS without being granted additional rights					
Supports a detailed WBS (more than 2 levels)					
Provides a Visual Task Board					
Open and edit WBS in Gantt, Open Workbench or Microsoft Project					
View / create task conversations					
View / create task to dos					
My Tasks View/Portlet					
Project - Financials					
Uses Rate Matrix rates for Planned Costs				In Projects, not in Staffing views	
Forecast rate field can override Rate Matrix for Planned Costs				In Staffing Views, not in Projects	
Create and Edit financial plans					Cost Plans Only
View Cost Plan of Record and review transactions					

Key Differences Between Classic and Modern UX (3)

	Classic	15.1	15.2	15.3	15.4
Roadmaps					
Can administer Roadmap and Roadmap Item Objects					
Can create and Modify Roadmap and Roadmap Item Instances					

Questions?

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- Click on **Report PDU's**
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- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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