

# 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

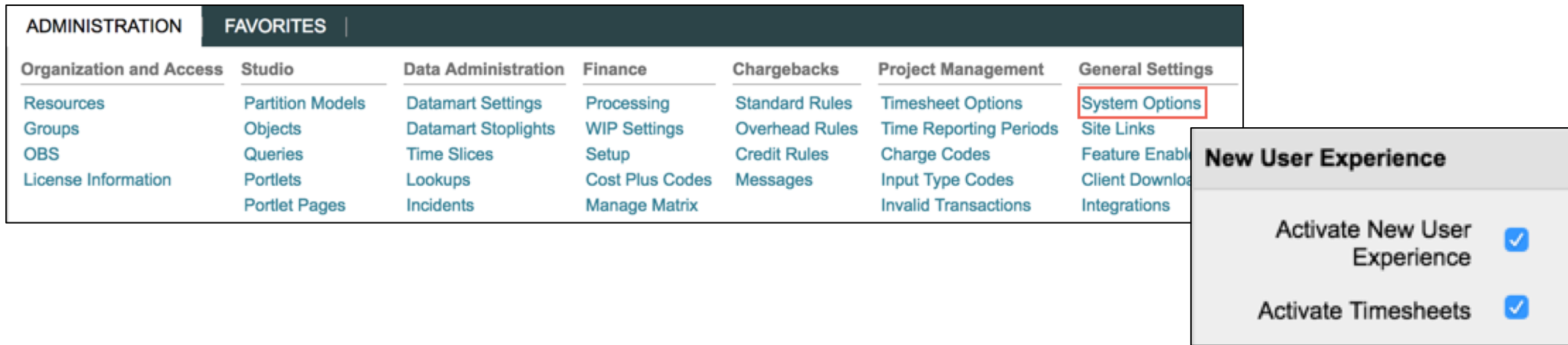
<Descriptor>

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# Enable the New User Experience (New UX)

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



ADMINISTRATION		FAVORITES				
Organization and Access	Studio	Data Administration	Finance	Chargebacks	Project Management	General Settings
Resources	Partition Models	Datamart Settings	Processing	Standard Rules	Timesheet Options	<b>System Options</b>
Groups	Objects	Datamart Stoplights	WIP Settings	Overhead Rules	Time Reporting Periods	Site Links
OBS	Queries	Time Slices	Setup	Credit Rules	Charge Codes	Feature Enable
License Information	Portlets	Lookups	Cost Plus Codes	Messages	Input Type Codes	Client Downloa
	Portlet Pages	Incidents	Manage Matrix		Invalid Transactions	Integrations

### New User Experience

Activate New User Experience ☒

Activate Timesheets ☒

- *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

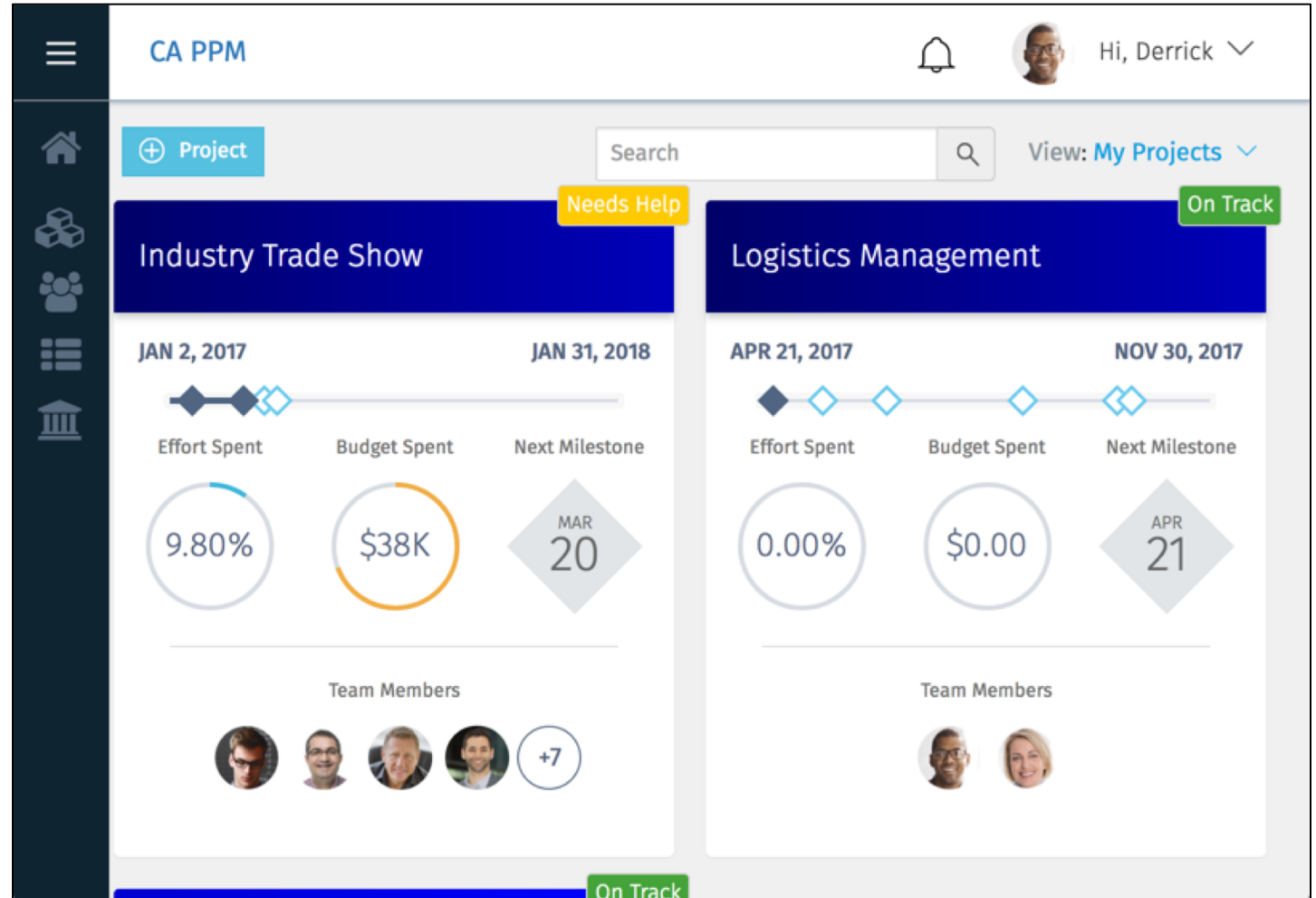
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# Project Management

- 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

Current Time Period →

FTEForecast

Resources Investments

Select Filters

			2017-03	2017-04	2017-05	2017-06	TOTALS
			FTE	FTE	FTE	FTE	FTE
×	PINNED (3)	ALL	4.20	3.95	3.95	3.85	0.74
★	▼ Andy Cooper	<div><div></div><div></div></div>	0.80	0.65	0.65	0.65	0.14
Collaboration Initiative			0.40	0.40	0.40	0.40	0.04
Industry Trade Show			0.40	0.25	0.25	0.25	0.10
Personalized online shoppin...			0	0	0	0	0
★	> Derrick Joseph	<div><div></div><div></div></div>	0.70	0.90	0.90	0.90	0.21
★	> Diane Durand	<div><div></div><div></div></div>	2.70	2.40	2.40	2.30	0.40



# 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) \*

**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

CA PPM

Current Time Period

Resources Investments Select Filters

	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08
	FTE	FTE	FTE	FTE	FTE	FTE	FTE
PINNED (2)  ALL	5.48	4.68	6.45	6.64	4.50	4.00	4.00
Adriana Ramos	3.00	3.00	3.00	3.00	2.45	2.00	2.00
4G Upgrade Readiness	1.00	1.00	1.00	1.00	0.45		
eBusiness Mobile Network	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Mobile Time and Approvals	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Alex Garcia	0.53	0.68	1.45	0.90	0.05	0	0
eBusiness Mobile Network	0	0	0	0	0	0	0
Executive Dashboard Visibility	0.25	0.13	0.90	0.35	0.05		
Learning Management System Upgrade	0.28	0.55	0.55	0.55			
Alex Riviera	1.95	1.00	2.00	2.74	2.00	2.00	2.00
Client Services Datamart	0.95	0	0	0.74			
eBusiness Mobile Network	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Upgrade Technology Center			1.00	1.00	1.00	1.00	1.00



# 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)

	Mon. 20	Tue. 21	Wed. 22	Thu. 23	Fri. 24	Sat. 25	Sun. 26	Total	ETC
<b>B2B Enhancements (PR1086)</b>									
<b>Complete Project Plan</b> (Planning Phase)	2.00							2.00	2.80
<b>Infrastructure Requirements</b> (Planning Phase)		3.00	1.00	4.00	5.00			13.00	0.00
<b>Requirements Definition</b> (Design Phase)									9.60
<b>Resource and Scope Plans</b> (Planning Phase)	6.00	4.00	4.00	6.00				20.00	7.20
<b>Review Design Phase</b> (Design									6.40

# 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

The screenshot shows the 'REVIEW & APPROVE' section of the 'MY TIMESHEET' page in CA PPM. The interface includes a navigation bar with 'CA PPM', 'MY TIMESHEET', and 'REVIEW & APPROVE'. Below this, there are tabs for different time periods: 'Feb 20 - Feb 26', 'Feb 27 - Mar 5' (selected), and 'Mar 6 - Mar 12'. A 'SHOWING' dropdown is set to 'My Team', and it indicates '5/10 Members'. A table lists team members with columns for their status: 'OPEN', 'SUBMITTED', 'APPROVED', 'POSTED', and 'RETURNED'. The table shows three members: Daniel Duvall, Dudley Danes, and Hank Fisher. A dropdown menu is open for the 'APPROVED' column, showing options 'RETURN ALL' and 'HIDE APPROVED'. A comment icon and a timestamp 'Feb 13, 2017 3:32 pm' are visible next to the 'APPROVED' status for Dudley Danes.

Team Member	4	OPEN	3	SUBMITTED	2	APPROVED	0	POSTED	1	RETURNED
Daniel Duvall Shopping Team HRS 40/40										
Dudley Danes Shopping Team HRS 40/40										
Hank Fisher SW Engineer										

# 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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# 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

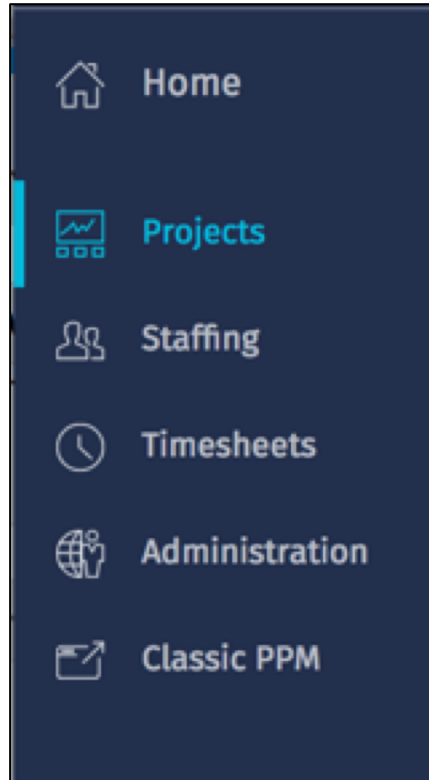
- Classic UX Changes:

- 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

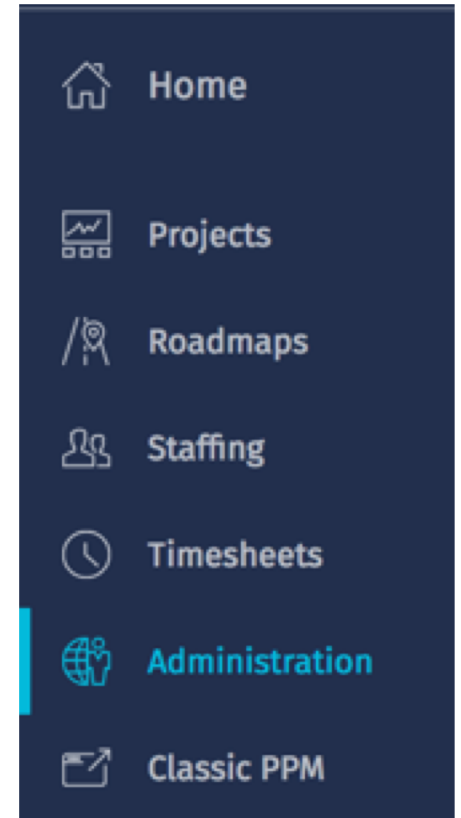
# New Link in Navigation Pane

- 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





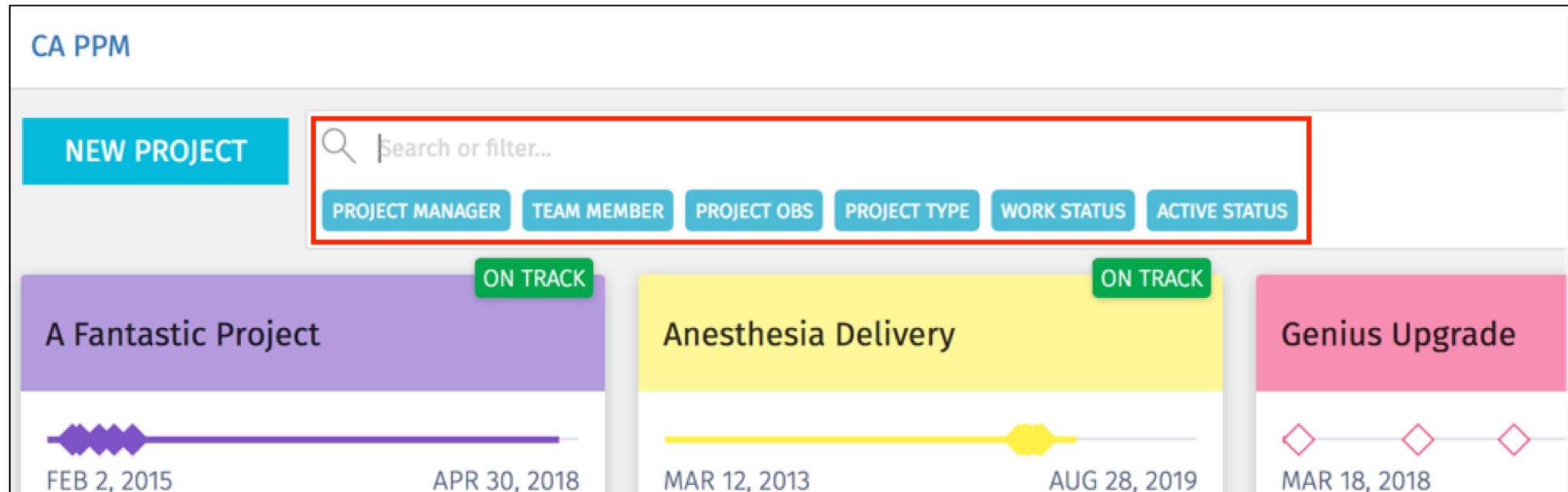
# New Security Rights

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

Security Rights Related to the New UX		New in 15.4
<b>General</b>		
Classic PPM - Navigate	Allow access to Classic PPM from new PPM UI	
<b>Blueprints</b>		
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.	
<b>Projects</b>		
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.	
<b>Resource Management / Staffing</b>		
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
<b>Resource Management / Staffing</b>		
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)

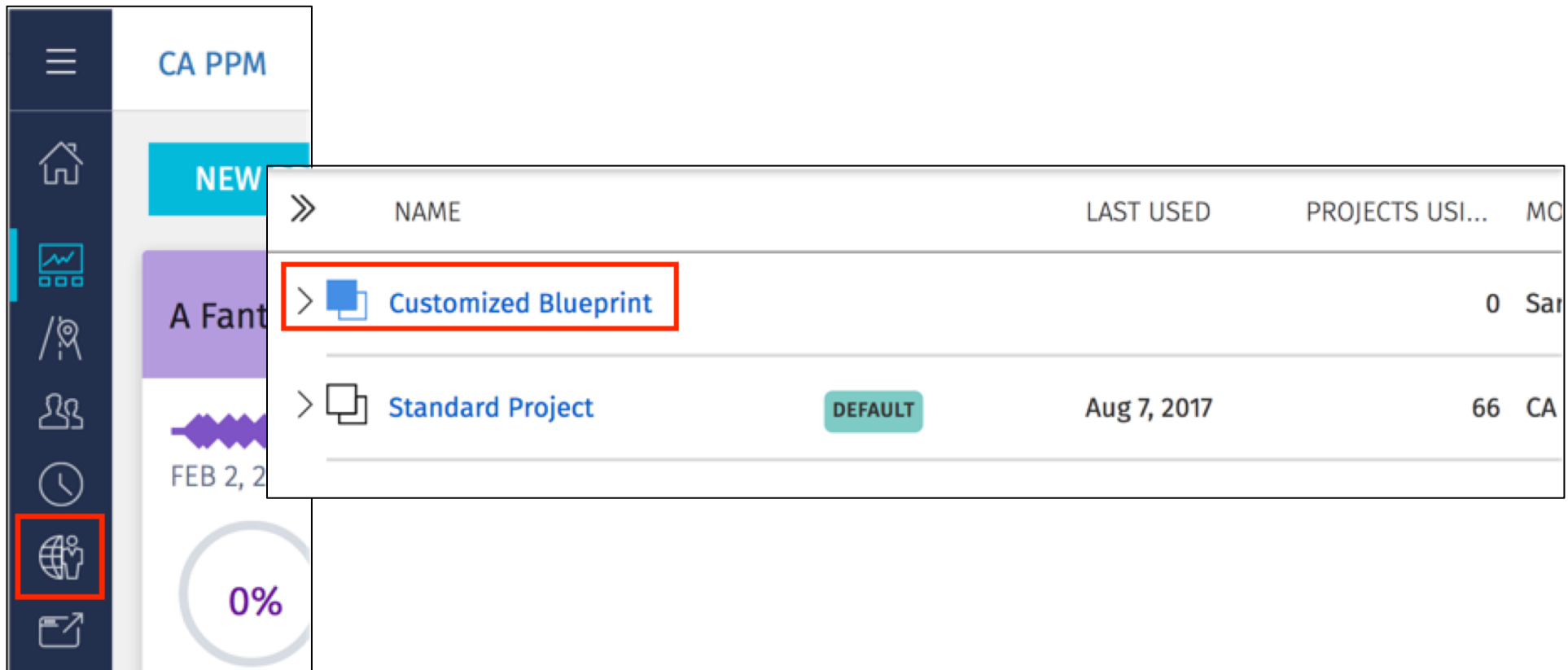
- Additional filter options now available on the Task view.
- Finish filter has set list of options.

The screenshot displays the Rego University task management interface. At the top, a navigation bar includes tabs for CONVERSATIONS, TASKS (highlighted with a red box), LINKS, STATUS, FINANCIALS, RISKS, and ISSUES. Below this, a 'NEW TASK' button is visible. A search bar labeled 'Search or filter...' is present, with a dropdown menu showing filter options: TASK OWNER, STATUS, FINISH (highlighted with a red box), TYPE, and PHASE. The main content area shows task cards under the heading 'Incoming'. One card is titled 'Initiating Process' with a due date of 'NOV 1'. A second card is titled 'Define Resource Plan'. A dropdown menu for the 'FINISH' filter is open, showing a list of options: 'Due today', 'Due tomorrow', 'Due in the next week', 'Due in the next 2 weeks', 'Due in the next 4 weeks', and 'Overdue' (all options are highlighted with a red box).

# Blueprint Changes

# Blueprint Changes (1)

- Additional project configuration is available via the blueprint.



The screenshot shows the CA PPM interface. On the left is a dark blue sidebar with icons for home, dashboard, projects, users, and a globe icon (highlighted with a red box). The main area has a 'NEW' button and a dropdown menu. The dropdown menu lists two options: 'Customized Blueprint' (highlighted with a red box) and 'Standard Project' (marked as 'DEFAULT').

NAME	LAST USED	PROJECTS USI...	MO
> <b>Customized Blueprint</b>		0	Sar
> <b>Standard Project</b>	Aug 7, 2017	66	CA



# Blueprint Changes (2)

Modify the blueprint to customize the following:

## 1. Details (project edit screen):

- 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

The screenshot shows a software interface for editing project details. At the top, there are three tabs: 'DETAILS' (highlighted with a red box), 'VISUALS', and 'MODULES'. Below the tabs is a 'FIELDS' panel on the left, which contains a search bar and a list of fields: '% COMPLETE', 'ACTIVE', 'ACTUALS', 'ASSIGNMENT POOL \*', 'BANNER COLOR', and 'BLUEPRINT'. To the right of the 'FIELDS' panel is a 'PROJECT SUMMARY' section with fields for 'NAME \*' and 'PROJECT TYPE'. The 'BLUEPRINT' field is also visible at the bottom of the 'FIELDS' panel.

# 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.

The screenshot shows a web-based configuration interface for an attribute. The 'Properties' tab is active, and the 'Auto-numbering' sub-tab is selected. The main heading is 'Object: Project | Attribute: Test Custom Attribute - Object Attribute'. The form contains several fields and checkboxes:

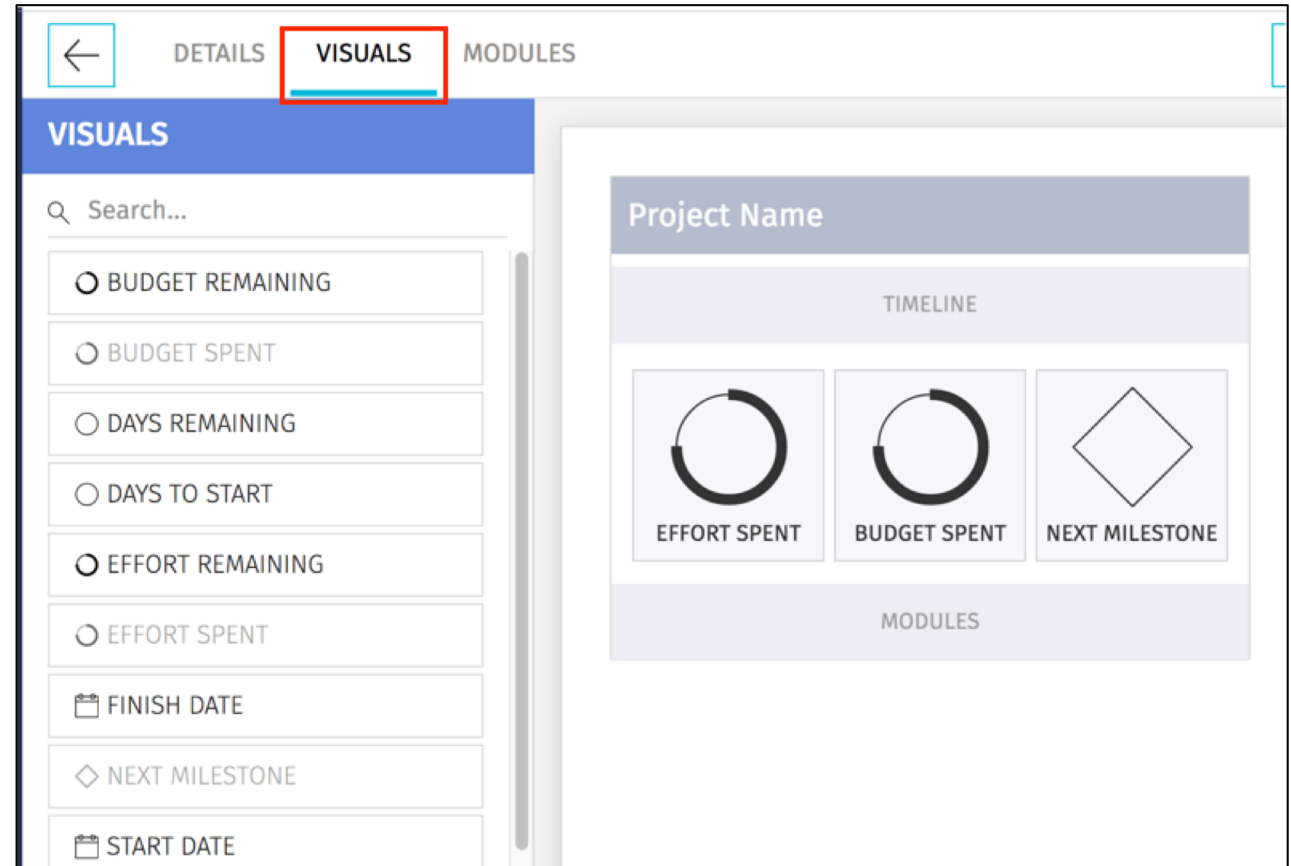
- Attribute Name:** Test Custom Attribute
- Attribute ID:** rego\_test\_cust
- Description:** (empty text box)
- Data Type:** String
- Default Value:** (empty text box)
- Maximum Size:** 20 (with a note: '( The maximum size is 2000. For 3 byte Unicode the actual maximum size is 1333. )')
- Populate Null Values with the Default:** ☐
- Value Required:** ☐
- Presence Required:** ☐
- Read-Only:** ☐ (with a note: '( In order to make an attribute read-only a default must be selected )')
- API Attribute ID:** regotestcust (This field is highlighted with a red box. A note below it says: '( This is the attribute id used in the REST API. Set this to make the attribute available via the REST API. )')
- Include in the Data Warehouse:** ☐

At the bottom, there are three buttons: 'Save', 'Save And Return', and 'Return'.

# Blueprint Changes (4)

## 2. Visuals:

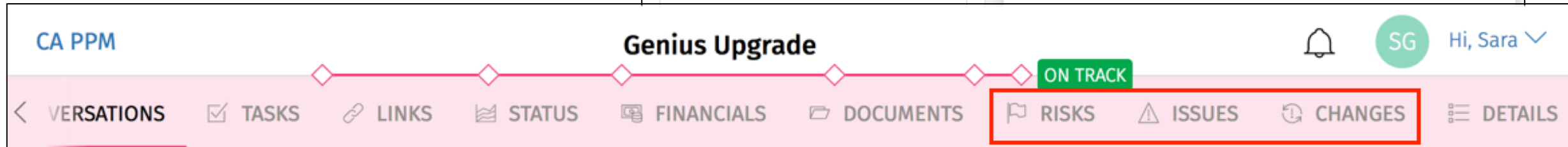
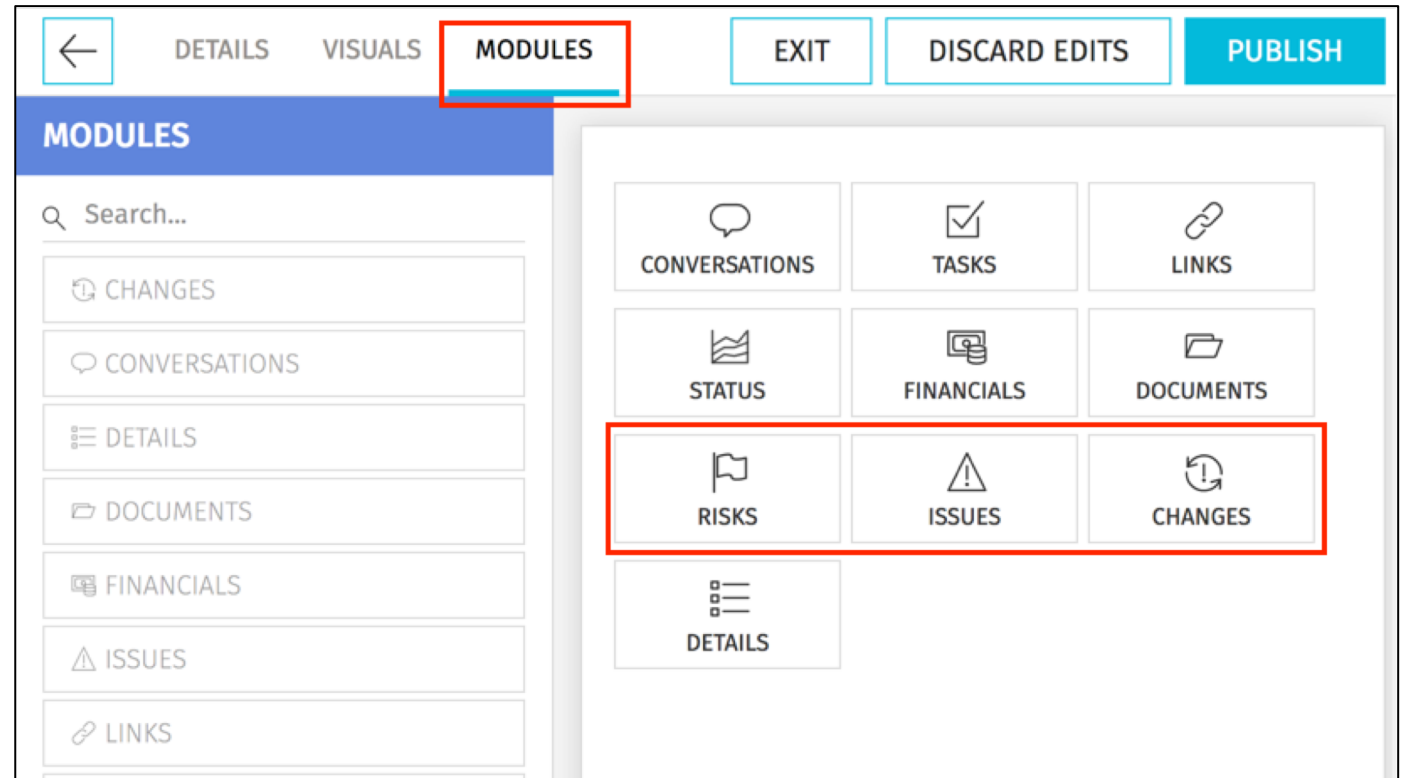
- No changes



# 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
- Still no Budget or Benefit Plan view/edit
- No multi-currency support

CA PPM

Genius Upgrade

ON TRACK

Hi, Sara

CONVERSATIONS TASKS LINKS STATUS FINANCIALS DOCUMENTS RISKS ISSUES

NEW PLAN

PLAN NAME	CREA.. ↓	PERIO...	START PERIOD	FINISH PERIOD	PLANNED COST
Monthly Plan	PLAN OF RECORD	Mar 18...	Monthly	Mar 1, 2018-Ma...	Dec 1, 2018-De... 80,300

COPY

DELETE

Monthly Plan

PLAN OF RECORD

VIEW Planned

Group By

Cost Type* ↑	Transactio...	MAR 1, 2018	PLANNED	MA...	JUN 1, 2018-JUN...	JUL 1, 2018-JUL ...	AUG 1, 2018-AL	TOTALS
					PLANNED	PLANNED	PLANNED	PLANNED
Capital	Software		50	0	50			300
Operating	Person	0	10,000	10,000	10,000	10,000	10,0	80,000

COPY

DELETE

POPULATE FROM ALLOCATIONS

POPULATE FROM ASSIGNMENTS

# 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

CA PPM

Create new R/I/CR inline

Genius Upgrade

ON TRACK

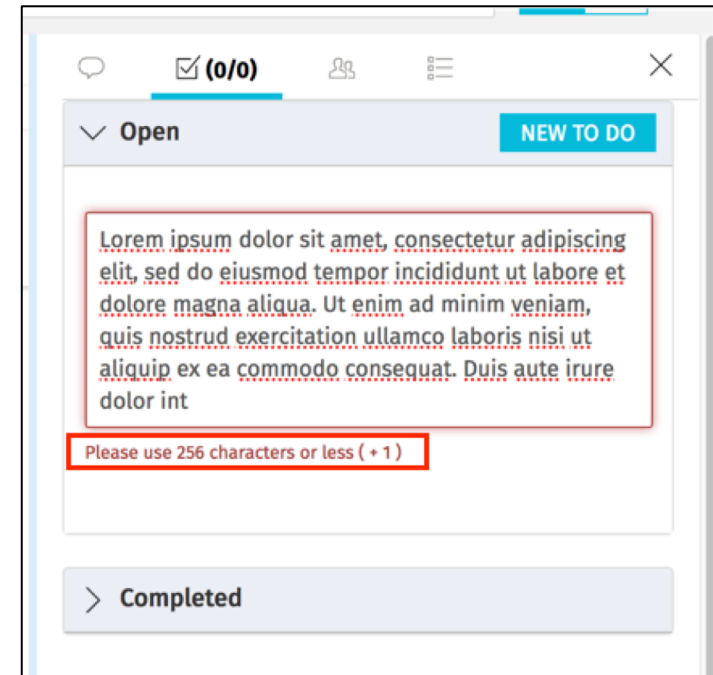
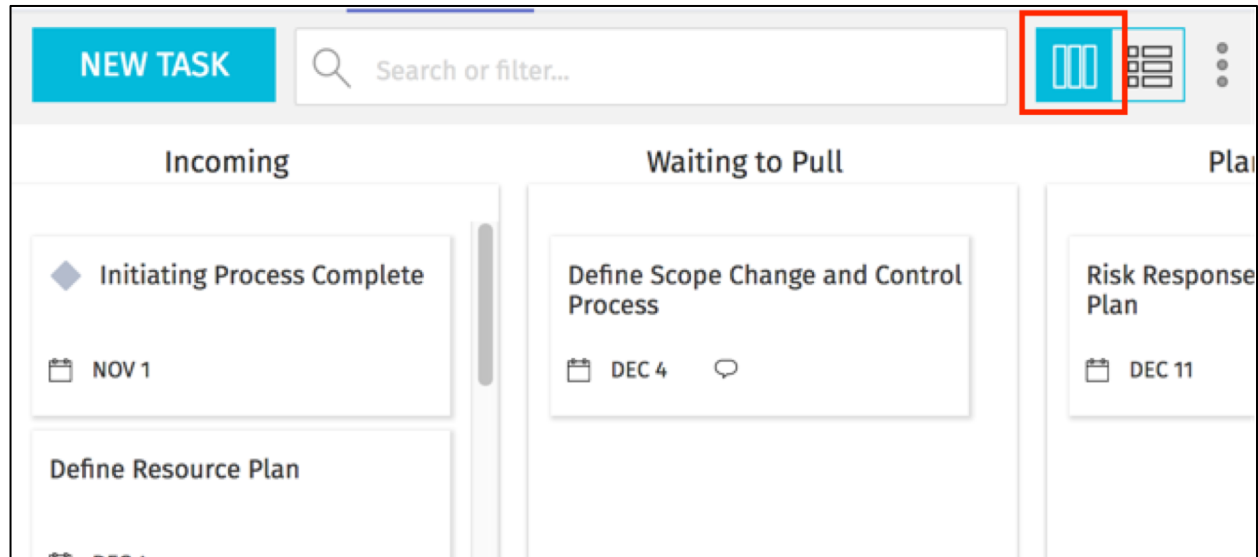
CONVERSATIONS TASKS LINKS STATUS FINANCIALS DOCUMENTS RISKS ISSUES CHANGES DETAILS

	Name*	Category Ty...	Priority*	Probability	Impact	Calculated ...	Is Above Th...	Status*	Assigned To*	Target Reso...	Last Update...
	Sample Risk	Funding	Low	Low	Low	Low	<input checked="" type="checkbox"/>	Open	Garvey, Sara	Mar 18 2018	Mar 18 2018

Configure which values are displayed/editable

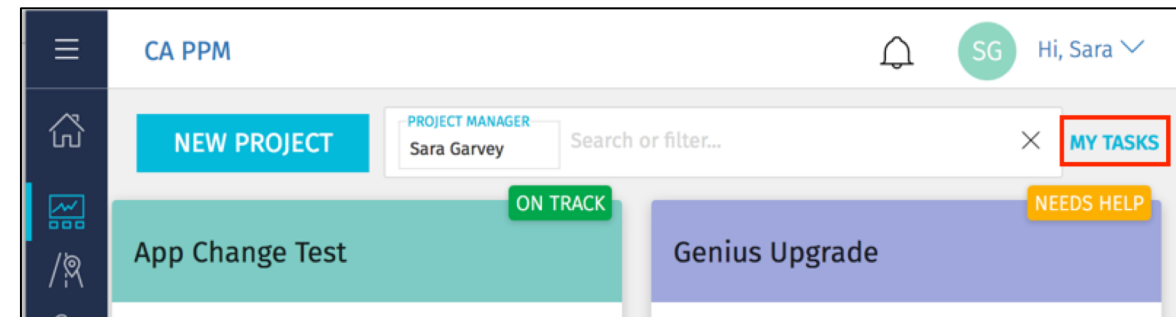
# Tasks Changes

- 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



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

# 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

Objects

Object Name:  Description:

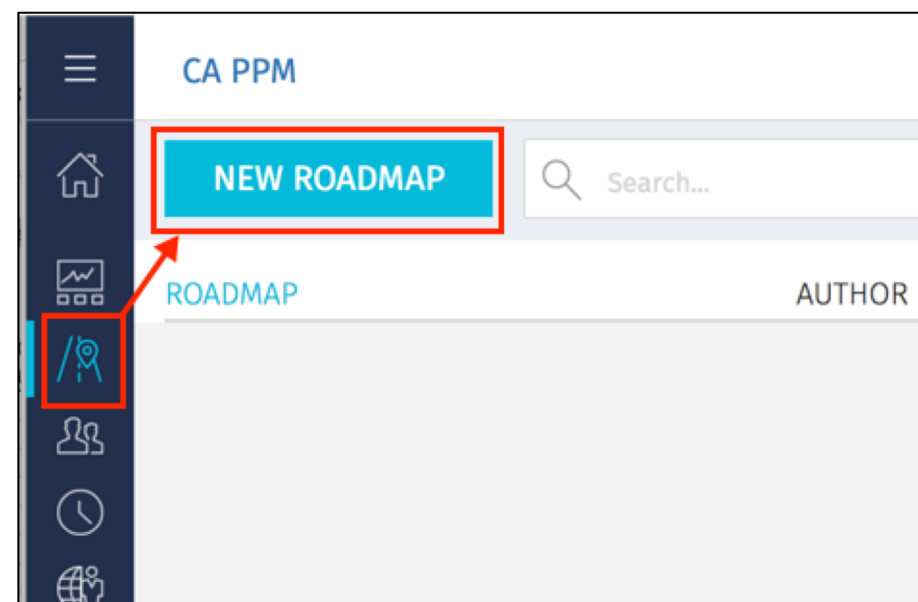
Object ID:

Master Object:

Data Warehouse:  Abstract Object:

Data Warehouse Trending:

<input type="checkbox"/>	Object ▲	ID	Description	Master Object	Partition Model	Event Enabled	Data Warehouse
<input type="checkbox"/>	Roadmap	rdm_roadmap	The Roadmap Object				✓
<input type="checkbox"/>	Roadmap Item	rdm_roadmap_item	The Roadmap Item Object	Roadmap			✓



# 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

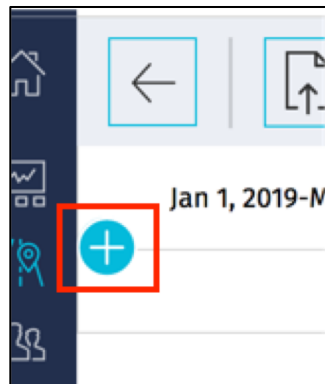
The screenshot shows a web interface for creating a new roadmap. At the top, there is a blue button labeled 'NEW ROADMAP' and a search bar with the placeholder text 'Search...'. Below this, a form is displayed with a red rectangular box highlighting the input fields. The form contains the following fields:

- NAME \***: A text input field containing the text 'Test Roadmap'.
- START PERIOD \***: A dropdown menu showing 'Jan 1, 2019-Dec 31, 2019 (Next Period)' with a downward arrow.
- DURATION \***: A dropdown menu showing '1 Year' with a downward arrow.

At the bottom right of the form, there are two buttons: a light blue 'CANCEL' button and a blue 'CREATE' button. The 'CREATE' button is also highlighted with a red rectangular box. Below the form, there is a small text label that reads 'Create a new roadmap.'

# Create New Roadmap Item

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



CA PPM Test Roadmap

SEARCH or filter...

VIEW

ADD ITEMS Click and Drag to draw items on the timeline

Jan 1, 2019-Mar 31, 2019 Apr 1, 2019-Jun 30, 2019 Jul 1, 2019-Sep 30, 2019 Oct 1, 2019-Dec 31, 2019

New Roadmap Item

ROADMAP ITEM \*

Sample Roadmap Item

☐ In Plan

START Feb 17 2019 FINISH May 04 2019

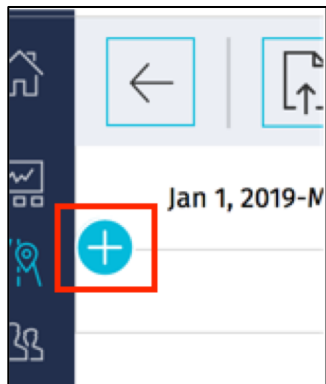
MUST HAVE Carryover, Required SPONSOR Hannah Avery

NOTE Note 123

DELETE DEPENDENCIES DONE

# Roadmap Settings

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



CA PPM Test Roadmap

SEARCH or filter... VIEW

ADD ITEMS Click and Drag to draw items on the timeline

Jan 1, 2019-Mar 31, 2019 Apr 1, 2019-Jun 30, 2019 Jul 1, 2019-Sep 30, 2019 Oct 1, 2019-Dec 31, 2019

New Roadmap Item

ROADMAP ITEM \*  
Sample Roadmap Item

☐ In Plan

START Feb 17 2019 FINISH May 04 2019

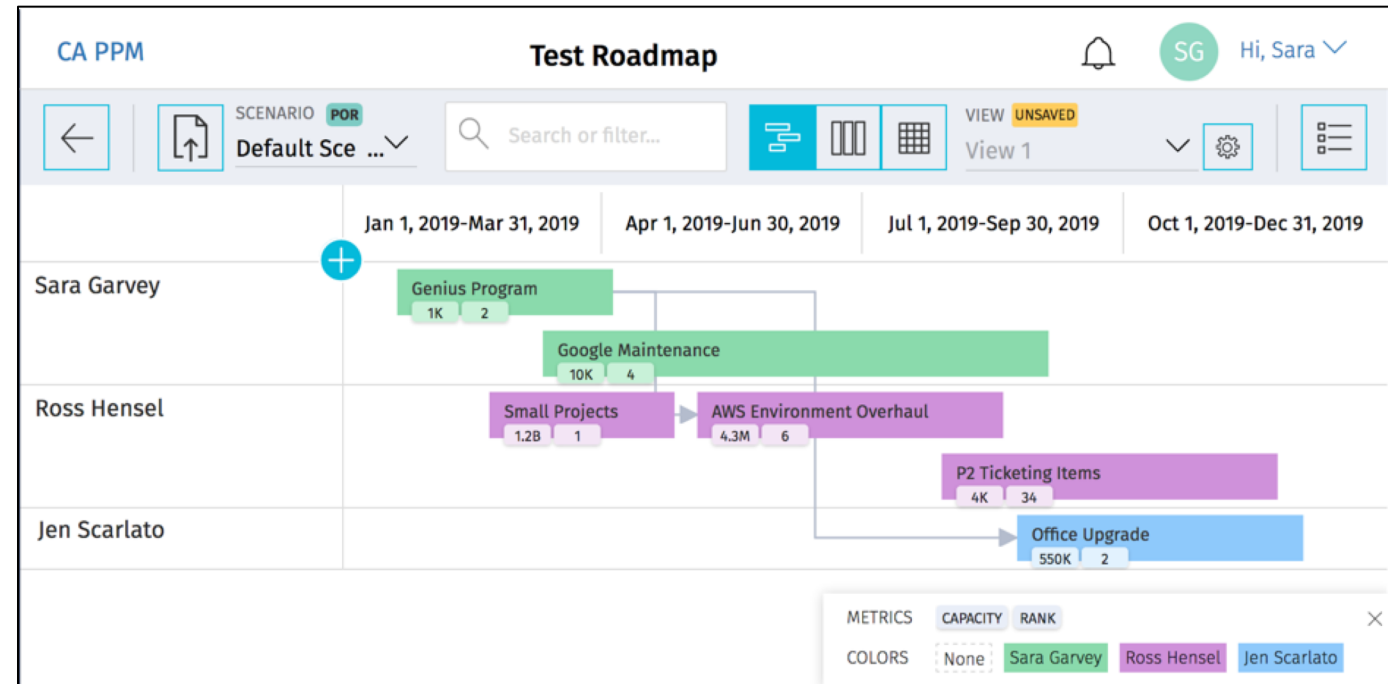
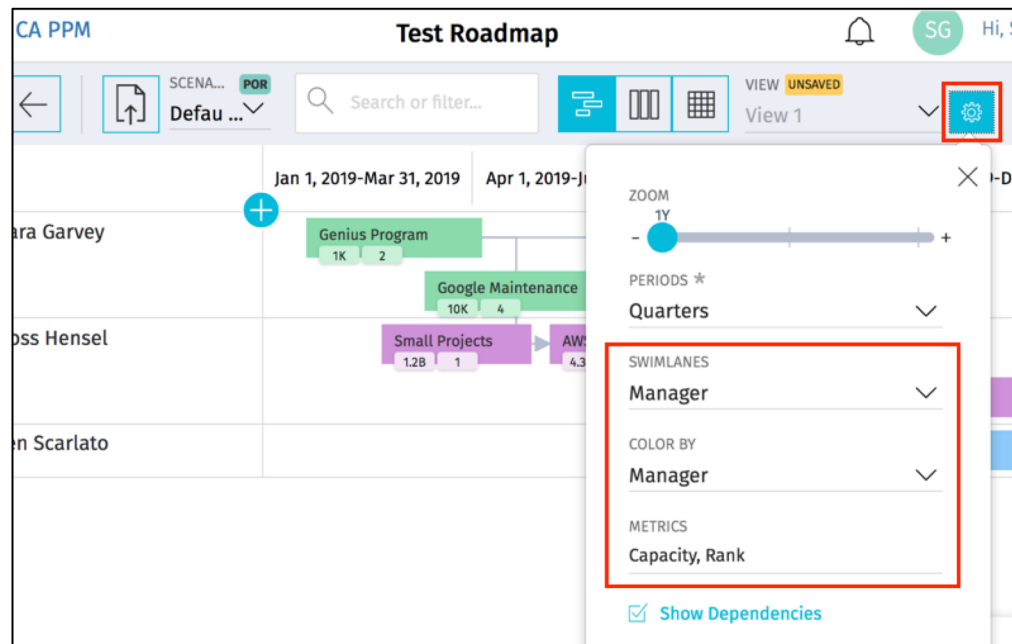
MUST HAVE Carryover, Required SPONSOR Hannah Avery

NOTE  
Note 123

DELETE DEPENDENCIES DONE

# Roadmap Options (1)

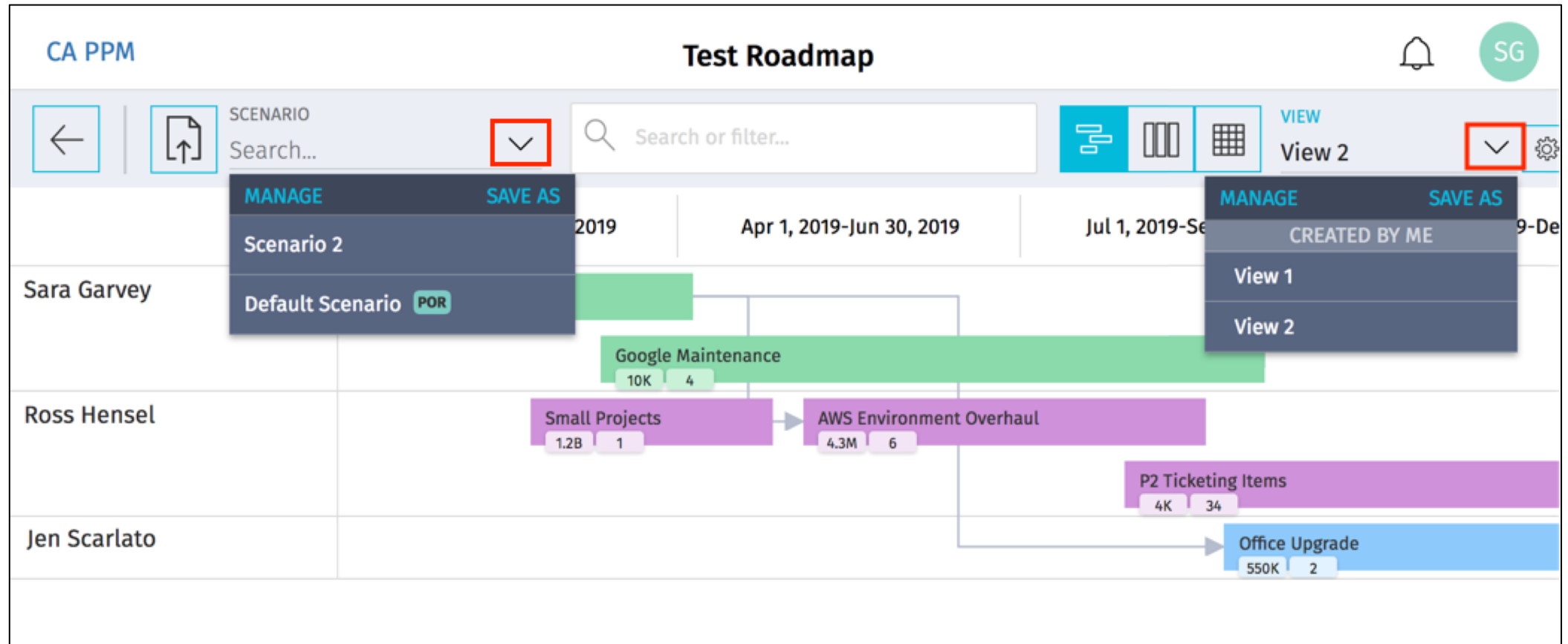
- Can add groupings, swimlanes, coloring and metrics
  - Metrics display on Gantt bars, and can only be number/money fields





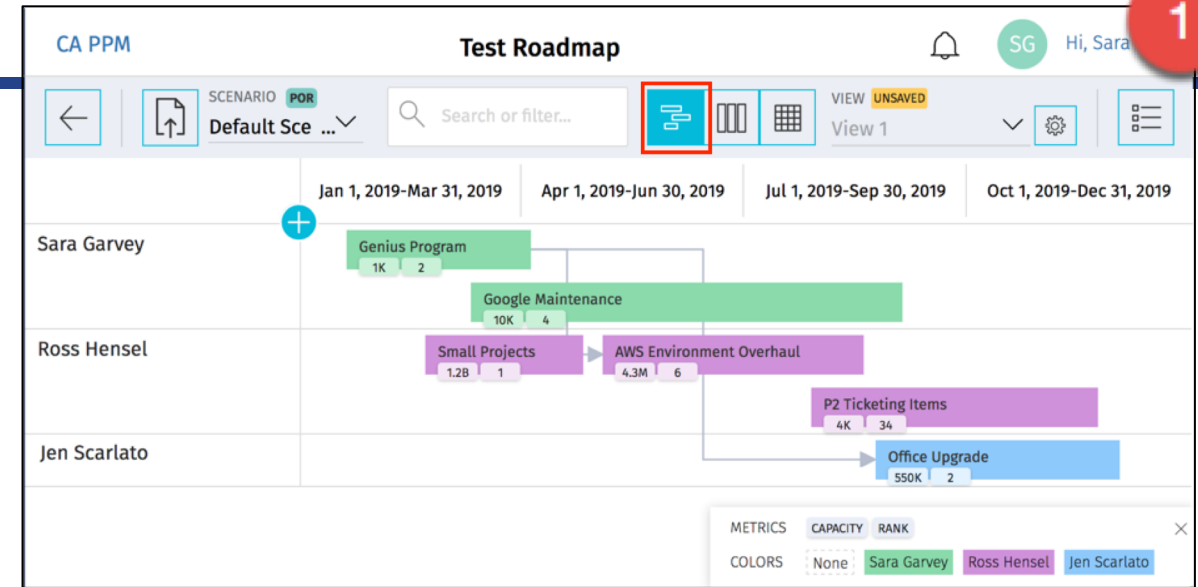
# Roadmap Options (2)

- 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



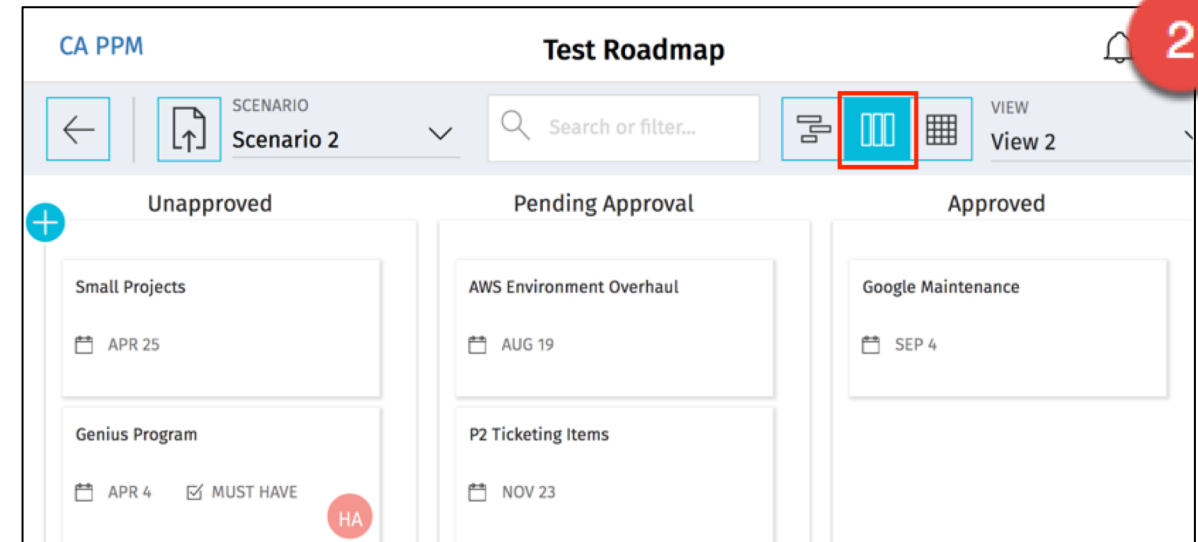
CA PPM Test Roadmap

SCENARIO **Scenario 2**

Search or filter...

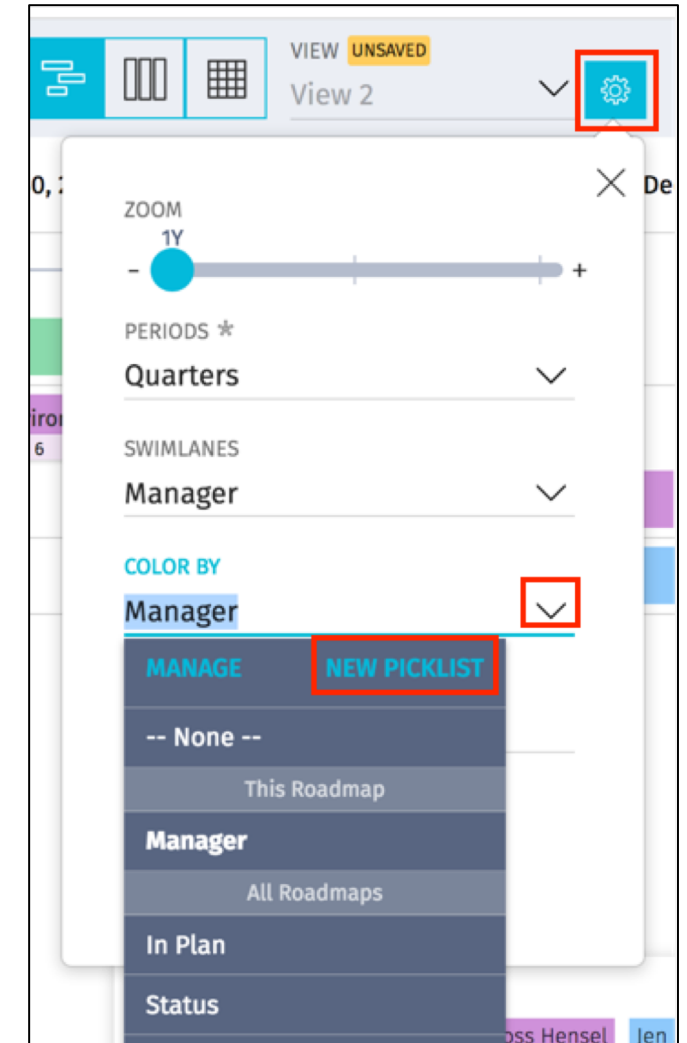
VIEW **UNSAVED** View 2

In Plan	Rank	Roadmap It...	Sponsor	Owner	Start	Finish
<input checked="" type="checkbox"/>	2	Office Upgrade	Administrator...	Bolin, Rod	Aug 24 2019	Dec 02 2019
<input checked="" type="checkbox"/>	1	Small Projects	Garvey, Sara	Administrator...	Feb 20 2019	Apr 25 2019
<input checked="" type="checkbox"/>	2	Genius Progr...	Avery, Hannah	Bolin, Rod	Jan 20 2019	Apr 04 2019
<input type="checkbox"/>	4	Google Maint...	Flores, Vivian	Avery, Hannah	Mar 10 2019	Sep 04 2019
<input checked="" type="checkbox"/>	6	AWS Environ...	Campbell, Re...	Bonham, Jess...	May 03 2019	Aug 19 2019
<input type="checkbox"/>	34	P2 Ticketing I...	Campbell, Re...	Bonham, Jess...	Jul 28 2019	Nov 23 2019



# 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
<b>General</b>					
Studio object configuration (create custom fields)					
OBS based and Multi-select filtering					
<b>Time</b>					
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					
<b>Resource Management</b>					
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
<b>Project - General</b>					
Can edit project OBS					
Supports Sub-Objects and Sub-Pages					
Supports Risks, Issues, Changes					
View/update project detailed fields (edit screen)					
<b>Project - Tasks</b>					
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					
<b>Project - Financials</b>					
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
<b>Roadmaps</b>					
Can administer Roadmap and Roadmap Item Objects					
Can create and Modify Roadmap and Roadmap Item Instances					



# Questions?



*rego*University 2018

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# Thank You For Attending regoUniversity

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- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- 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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