

Project Management | OOTB Introduction

Your Guide: Sara Garvey

Introductions

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



Agenda

- Introduction
- Managing Projects
- Staffing Projects
- Work Breakdown Structure
- Task and Resource Assignments
- Project Sub-Objects
- Financial Plans
- Project Views
- Project Management in the Modern UX

Part I: Introduction

Discuss Rego Base Configuration
CA PPM Project Management Overview

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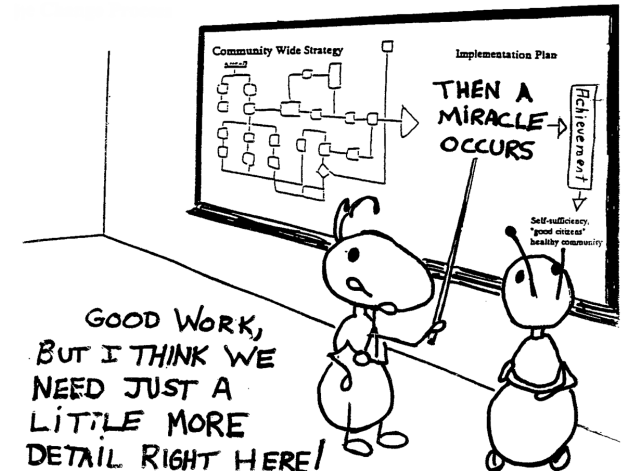
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Rego Base Configuration

- This demo environment has Rego's OOTB Base Configuration applied
- The base configuration is composed of 3 main activities:
 - Base setup of items – entity, fiscal periods, financial class fields with 1 value, datamart and other jobs, etc. without this, most of the OOTB views and jobs will not work.
 - Simplify the UI – Based on what we have seen with hundreds of implementations, we “hide” not delete certain OOTB fields and leave the most common fields. For example, Risk has about 50 fields, but most clients use only about 10. Another example is that project has 6 subpages with hundreds of fields, and most clients simplify to 2 subpages and about 50 fields. This is just for the initial sessions, after which, if the client needs them, we can unhide other OOTB fields. Status report is another example where there are about 20 fields and we hide 6 of them that 95% of our clients do not use.
 - Install several Rego accelerators for security groups, workflows, and portlets. We adjust the menu to include them – views that are most commonly used.

CA PPM Project Management

- Projects are temporary endeavors undertaken to create a unique product or service
 - Key elements are tasks and staff
 - Tasks define project work
 - Staff are the resources who perform tasks
 - Document and manage Risks, Issues and Change Requests
- Top Project Constraints are time, budget, and resources
 - CA PPM lets you manage each constraint
 - Determine project schedule
 - Determine cost based on resource estimated planned work and actual hours (Timesheets)
- CA PPM has the flexibility to manage your project throughout the project life cycle, adapting to changes, risks and issues proactively to minimize the impact to the project constraints
- To manage detailed project schedules on a daily basis.
 - Use CA PPM Autoschedule, Open Workbench (OWB) or MS Project (MSP)



Part II: Managing Projects

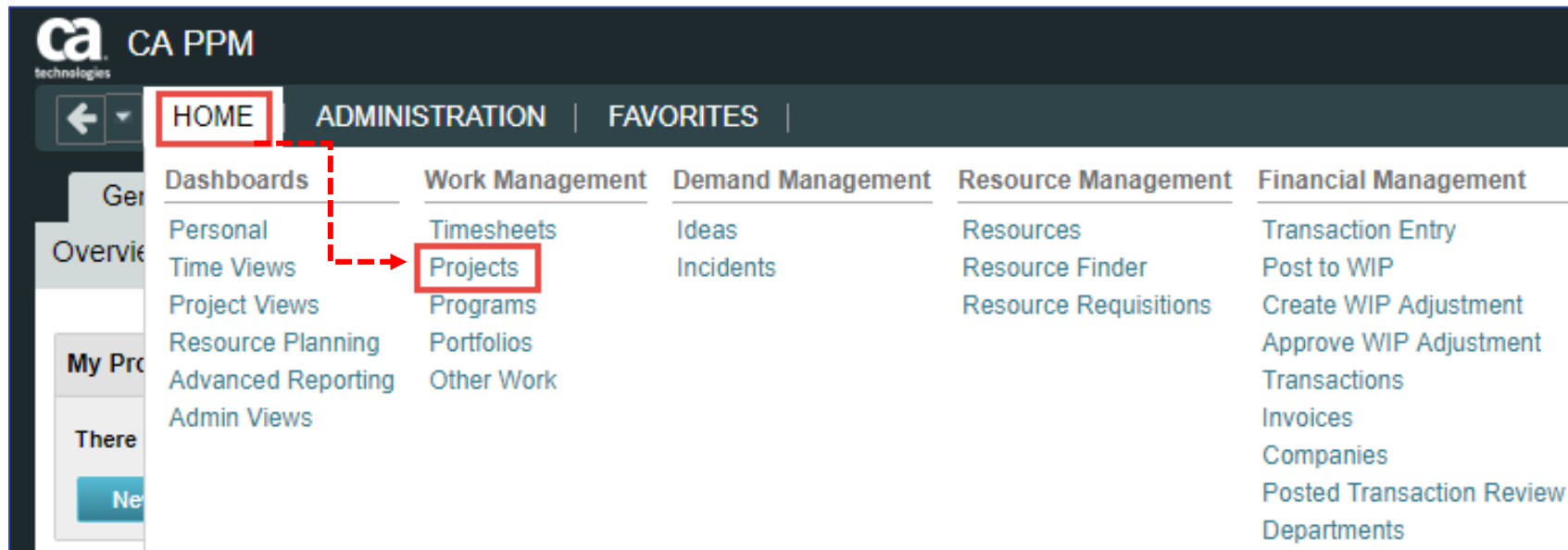
Accessing Projects
Project Properties

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Accessing Projects

- To access projects, hover over Home, then click Projects under Work Management
 - Note that navigation bar links and section headers may be different depending on how your CA PPM administrator has configured the interface
 - Also be aware that access depends on having the correct security rights (PMs typically have more access than team members who just enter time)



Project List View

Project List view displays all the project the end user has access to and is divided into two sections

- Click the + sign to Expand the Filter if it is collapsed by default
 - The top portion of the screen is a filter allowing you to search CA PPM for items meeting specific criteria
 - The bottom portion of the screen is the list that displays the results of your filter criteria

The screenshot shows the 'Projects' interface. At the top, there is a filter section with a minus sign icon (labeled 'Shows/Hides the filter') and a 'Filter' button. Below the filter section are input fields for Project Name, Project ID, OBS Unit, and OBS Unit - Filter Mode. There are also buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear'. A table below displays the project list. A red arrow points to the 'Project' column header with the text 'Click a heading to sort by that value'. A blue box on the right contains the text 'Base Configuration – Project Security Groups'. A red arrow points to the table with the text 'Filter results display here'.

Active	Investment ID	Project	Manager	Start	Finish	Scheduler Format
✓	PR000011	A Fantastic Project	Joshi, Navdeep	2/2/15	4/30/18	Microsoft Project
✓	PR000010	Anesthesia Delivery	Joshi, Navdeep	3/12/13	8/28/19	Workbench
✓	csk.appChange	Application Change Template		10/24/17	11/2/17	Microsoft Project
✓	csk.appCOTS	Application COTS Template		10/24/17	12/2/17	Microsoft Project
✓	csk.infrastructure	Infrastructure Deployment Template		10/24/17	11/27/17	Microsoft Project
✓	csk.majorIT	Major Project Template		10/24/17	2/12/18	Microsoft Project
✓	PR000017	New Master Project - Acme Migration	Bolin, Rod	2/6/17	1/1/19	Workbench
✓	PR000014	Online Application	Bolin, Rod	11/29/17	3/1/18	Workbench

Accessing Projects

1. Home > Work Management > Projects
2. Click on the **+** sign to expand the filter
3. Enter **filter criteria** (optional)
4. Click **Filter**
5. Click on the **Project** in the list to open

Projects

Filter: System Default ▾

Project Name

Project ID

OBS Unit

OBS Unit - Filter Mode Unit only ▾

Manager

Active Yes ▾

Power Filter [Build Power Filter]

Filter Show All Save Filter Clear

Base Configuration - Project Filter section is simplified

<input type="checkbox"/>	Active	Investment ID	Project ▲	Ma	Scheduler Format	
<input type="checkbox"/>	✓	PR000011	A Fantastic Project	Joshi, Navdeep	2/2/15 4/30/18	Microsoft Project
<input type="checkbox"/>	✓	PR000010	Anesthesia Delivery	Joshi, Navdeep	3/12/13 8/28/19	Workbench
<input type="checkbox"/>	✓	csk.appChange	Application Change Template		10/24/17 11/2/17	Microsoft Project
<input type="checkbox"/>	✓	csk.appCOTS	Application COTS Template		10/24/17 12/2/17	Microsoft Project
<input type="checkbox"/>	✓	csk.infrastructure	Infrastructure Deployment Template		10/24/17 11/27/17	Microsoft Project



Tip: You can use the list as a “mini-dashboard” for project data if you set your filter to show only your projects

Project Properties and Subpages

- PMs and users with the proper access rights may update project information on the various tabs, links, and subpages
- What's displayed in your instance may differ due to your configuration and security settings

The screenshot shows the 'Project Properties' interface. At the top, a navigation bar includes tabs: Dashboard, Properties (selected), Team, Tasks, Financial Plans, Chargebacks, Hierarchy, Risks/Issues/Changes, Collaboration, and Processes. Below this, a sub-navigation bar shows 'Main' (selected), Subprojects, Dependencies, Baseline, and Estimating. A dropdown menu for 'Properties' is open, showing options: General (selected), Admin & Finance, and Status Reports. To the right of the dropdown, a 'Links' section contains 'Access to this Project', 'Full View', 'Resource', and 'Group'. Further right, a 'Tabs' section contains 'Open in Scheduler' and 'Scenario: [--Select--]'. The main content area is divided into two sections: 'General' and 'Description'. The 'General' section includes fields for Project ID (PR000020), Project Type (Major Project), Status (Unapproved), Charge Code ([--Select--]), and Progress (Not Started). The 'Description' section has a large text area labeled 'Description'. Red arrows point from the 'Subpages' label to the 'Properties' dropdown, from the 'Links' label to the 'Links' section, and from the 'Tabs' label to the 'Tabs' section.

Project Security

- Access to the project is controlled via CA PPM Security Groups:
 - You may have read/write access or read only access to all projects
 - You may have read/write access to only the project you are designated as PM
- Security Groups in Base Configuration:
 - Project Creator
 - Project Editor, Scheduler
 - Book Resources to projects
 - Report access

The screenshot shows the 'Project: Project Planning Software Training - Properties - Main - General' form. The form is divided into several sections: General, Description, Schedule, and Status. The General section contains fields for Project Name, Project ID, Project Type, Status, Charge Code, Progress, Project Manager, Stage, Goal, and Priority. The Description section has a text area for the project description. The Schedule section includes Start Date, Finish Date, Baseline Start, and Baseline Finish. The Status section has a Status Indicator and a Status Comment text area. At the bottom, there are buttons for Save, Save And Return, and Return.

Section	Field	Value
General	Project Name	Project Planning Software Training
	Project ID	PR000020
	Project Type	Major Project
	Status	Unapproved
	Charge Code	[--Select--]
	Progress	Not Started
	Project Manager	McGuire, Noreen
	Stage	Initiation
	Priority	30
Description	Description	
Schedule	Start Date	1/29/2018
	Finish Date	5/14/2018
	Baseline Start	
	Baseline Finish	
Status	Status Indicator	On Track
	Status Comment	

Project Properties

- Base Configuration - General
 - Schedule and Status sections
 - Attributes renamed, hidden or moved to other subpages
 - Defaults set
 - Fields resized
 - Properties tab dropdown updated with concise subpage options

The screenshot displays the 'Project Properties' form. The 'Properties' tab is selected, showing a dropdown menu with options: Main, Subprojects, Dependencies, Baseline, Estimating, Properties, General, Admin & Finance, Status Reports, Access to this Project, Full View, Resource, and Group. The form fields are as follows:

- Project ID:** PR000014
- Project Type:** Major Project
- Status:** Unapproved
- Charge Code:** [--Select--]
- Progress:** Not Started
- Project Manager:** Bolin, Rod
- Stage:**
- Goal:** [--Select--]
- Priority:** 10
- Description:**
- Schedule:**
 - Start Date:** 11/29/2017
 - Finish Date:** 3/1/2018
 - Baseline Start:**
 - Baseline Finish:**
- Status:**
 - Status Indicator:** [--Select--]
 - Status Comment:**

Buttons at the bottom: Save, Save And Return, Return.

Project Properties

- Admin & Finance Subpage
 - Classifications defined:
 - Resource Class
 - Company Class
 - WIP Class
 - Investment Class
 - Transaction Class
 - Transaction Rates
 - Section simplified
 - Financial Cost & Rate Matrix setup

The screenshot displays the 'Admin & Finance' subpage of the 'Project Properties' window. A navigation menu on the left shows 'Main', 'Subprojects', 'Dependencies', 'Baseline', and 'Estimating'. The 'Main' menu is expanded, showing 'Properties', 'General', 'Admin & Finance' (selected), and 'Status Reports'. The main content area is divided into several sections:

- General:** Includes fields for Company Name, Department, Location, Billing Currency (USD), Financial Status (Hold), WIP Class, Investment Class, Cost Type (Operating), and Charge Code.
- Transaction Rates:** Includes fields for Labor Rate Source, Labor Cost Source, Expense Rate Source, Expense Cost Source, Exchange Rate Type - Labor (Average), and Exchange Rate Type - Expense (Average).
- Admin:** Includes checkboxes for Active (checked) and Program (unchecked), Open for Time Entry (checked), and Template (unchecked). It also has a Track Mode dropdown set to PPM and a Dashboard View dropdown set to Project Default Layout.
- Financial Planning:** Includes fields for Planned Cost, Planned Benefit, Planned Cost Start, Planned Cost Finish, Planned Benefit Start, and Planned Benefit Finish.

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

Project Properties

- Status Reports Subpage
- Succinct report sections, fields and display

The screenshot displays the 'Status Reports' subpage within the 'Properties' section of a project management interface. The page is titled 'Status Report' and shows a form for entering project status information. The form includes sections for 'Overall', 'Schedule', 'Scope', and 'Cost and Effort', each with a status dropdown and a comment field. The 'Overall' status is 'On Track', 'Schedule' is 'Minor Variance', 'Scope' is 'On Track', and 'Cost and Effort' is 'On Track'. The 'Report Date' is set to 1/26/2018. The 'Publish' checkbox is unchecked. The 'Save' button is highlighted. A legend at the bottom indicates that a red square icon means 'Required' and a green star icon means 'Unique'.

Properties ▾ Team Tasks

Main Subprojects Dependencies Baseline Estimating

Properties General Admin & Finance Status Reports

Processes

ication | Status Report: Weekly Status - 1/26/18 - General - Properties Actions ▾

Status Report

SR000002 Report Date 1/26/2018

Publish ☐

Overall

Current Overall Status On Track Overall Comment

Schedule

Schedule Status Minor Variance

Schedule Comments

Scope

Scope Status On Track

Scope Comments

Cost and Effort

Cost and Effort Status On Track

Cost and Effort Comments

Save Save And Return Return

☐ = Required ☒ = Unique

Part III: Staffing the Project

The Team Tab

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Team Tab

- The *Team* tab (1) has an *Actions* drop-down (2) and a *Configure* (3) icon
- Use the *Team* tab to
 - Staff the project with roles and named resources
 - Manage booking status
 - Manage start and finish dates
 - Manage allocation for the project
- Click *Add* or *Add/Update by OBS* to staff the project team (4)

Project: Project Planning Software Training - Team - Staff

Scenario: [--Select--] Actions

Filter: System Default

	Resource/Role	Project Role	Open for Time	Booking Status	Request Status	Start	Finish	Average Allocation %	Allocation	ETC
<input type="checkbox"/>	Architect	Architect	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	160.00
<input type="checkbox"/>	Business Analyst	Business Analyst	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	280.00
<input type="checkbox"/>	Developer	Developer	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	320.00
<input type="checkbox"/>	Network Engineer	Network Engineer	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	240.00
<input type="checkbox"/>	Project Manager	Project Manager	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	280.00
<input type="checkbox"/>	Storage Architect	Storage Architect	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	160.00
<input type="checkbox"/>	Test Engineer	Test Engineer	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	160.00
Total									4,256.00	1,600.00

Displaying 1 - 7 of 7

Buttons: Save, Add, Add/Update by OBS, Remove

Part IV: Work Breakdown Structure

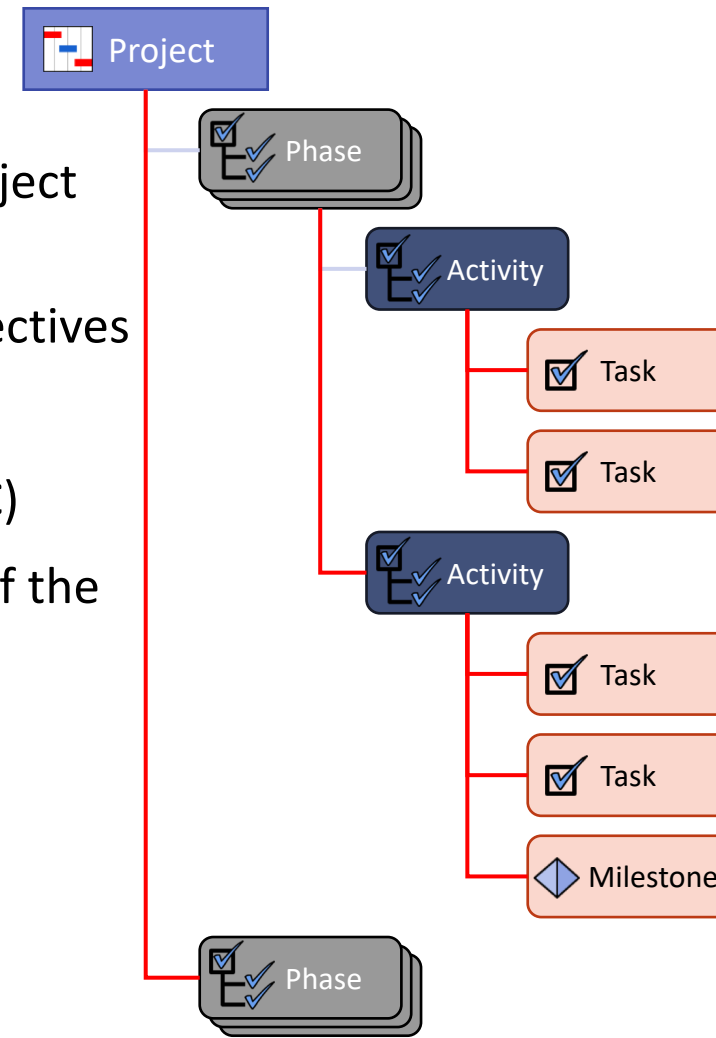
The Tasks Tab
Task Properties

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Work Breakdown Structure

- WBS typically consists of phases, activities, and tasks
 - Phases are the major steps required to achieve a project goal
 - Activities are established to complete the phase objectives
 - Activities are split into tasks to break up the work
 - Milestones have no duration and no work effort (ETC)
 - Resource Assignments are done at the lowest level of the WBS - Tasks



Tasks Tab

The Task Tab contains information and sub-pages pertaining to the work breakdown structure.

- The Task List may be filtered to display only those tasks that have been marked as “Key Tasks” (1)
 - Click the +/- icon to show/hide the filter (2)
 - Click the down arrow to view additional sub-pages (3)

Project: Project Planning Software Training

Filter: None ▾

Task Name

Task ID

Tasks Only

Milestone

Key Task (1)

Open for Time Entry

Status

Start to

Finish to

WBS Sort to

Power Filter [Build Power Filter]

Filter Show All Save Filter Clear

WBS Sort	Task	Task ID	Status	Start	Finish	Duration	Actuals	ETC	Total Effort	Open for Time Entry
1	Initiation Phase	LM.000.000	Not Started	1/29/18	1/29/18	1	0.00	0.00	0.00	✓
2	Initiating Process Complete	LM.000.100	Not Started	1/29/18	1/29/18	0	0.00	0.00	0.00	✓
3	Planning Phase	LM.001.000	Not Started	1/29/18	2/23/18	20	0.00	480.00	480.00	✓
	Define Scope Change and Control Process	LM.001.010	Not Started	1/29/18	2/2/18	5	0.00	40.00	40.00	✓

Link to Task Properties Window

Task Properties

Properties ▾ Estimating Associated Risks/Issues Processes

Project: Project Planning Software Training | Task: Define Resource Plan - Task Properties

General

Name Define Resource Plan Milestone ☐

ID LM.001.020 Key Task ☐

Status Not Started ▾ Open for Time Entry ☒

% Complete 0.00% Charge Code Work ▾

% Expended 0.00% Cost Type Operating

User Text 1

Schedule Dates

Start 2/5/2018 Baseline Start

Finish 2/16/2018 Baseline Finish

Duration 10.000 Baseline Usage

Baseline Duration

Schedule Constraints

Must Start On

Must Finish On

Late Start

Late Finish

- Tasks can be created within Clarity, the Gantt View or MS Project
- Base Configuration
 - Charge Codes, Cost Types defined
 - Attributes renamed, hidden or moved to other subpages
 - Defaults set

Guidelines

Guidelines

Save Save And Return Return

Required Unique

Assignments

	Resource	Role	Loading Pattern	Start	Finish	Actuals	Actual Cost (ACWP)	ETC	EAC	ETC By Period					
										1/29/18	2/5/18	2/12/18	2/19/18	2/26/18	3/5/18
	Project Manager	Project Manager	Front	2/5/18	2/16/18	0.00		80.00	80.00		40.00	40.00			
Total						0.00		80.00	80.00		40.00	40.00			

Displaying

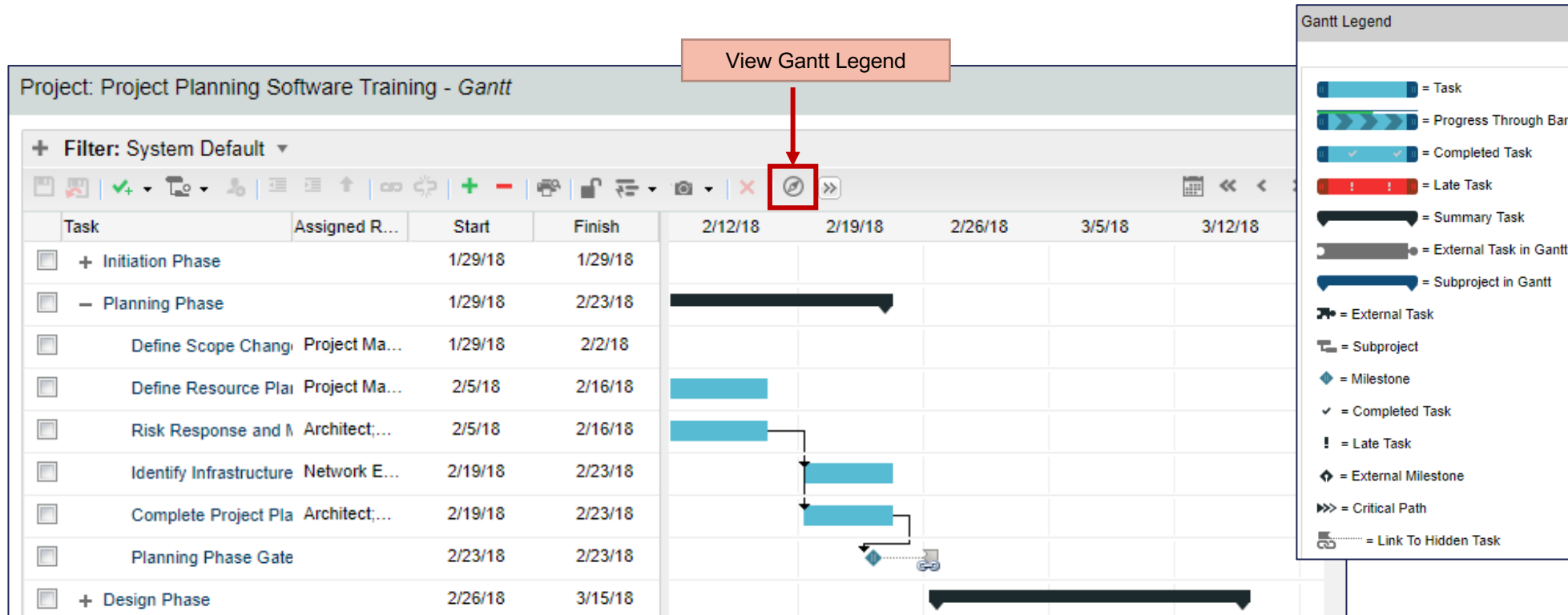
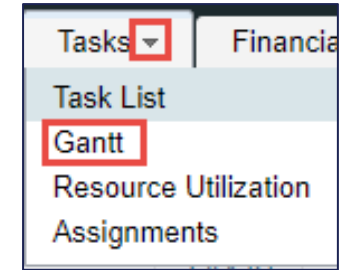
Role Work Effort = Hours

Currency = USD

Save Assign Replace Remove

PPM Gantt View

- Create, edit and manage project tasks using the Gantt view
- Click the Tasks down arrow and select Gantt to open the Gantt view in a new browser window



Part V: Resource Assignments to Tasks

Create an Assignment

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Assigning Resources and Roles to Tasks

- After creating the WBS and populating the Team, assign resources to tasks
- Based on the Organizations decisions of how the “*Assignment Pool*” field is set up at project creation will impact how resource / roles can be assigned to tasks
 - **Team Only** – when selected means that all resources / roles MUST be staffed (Team Tab) to the project before they can be assigned to any tasks
 - **Resource Pool** – when selected means that resources / roles can be assigned to tasks without be placed on the Team Tab first. Once they are assigned to a task, they will appear on the Team Tab with a default allocation of 100%
- You can use the Gantt view to assign resources to tasks, but you must enter the ETC for each resource using the Task Dialogue Assignment button
- Navigate to the *Task tab* and click *Task name* to access the Task Dialogue box

Properties ▾ Estimating Associated Risks/Issues Processes

Project: Test Project | Task: Kickoff Meeting - Task Properties

General

■ Name Kickoff Meeting

* ID

■ Start 4/3/2017

■ Finish 4/3/2017

Key Task ☐

Milestone ☐

Fixed Duration ☐

Save Save And Return Return

■ = Required * = Unique

Assignments

Create an Assignment

Properties ▾ Estimating Associated Risks/Issues Processes

Project: Test Project | Task: Kickoff Meeting - Task Properties

General

📌 Name

★ ID

📅 Start

📅 Finish

Key Task ☐

Milestone ☐

Fixed Duration ☐

📌 = Required ★ = Unique

Assignments

<input type="checkbox"/>	Resource ▴	Role	Loading Pattern
<input type="checkbox"/>	Business Analyst	Business Analyst	Front
<input type="checkbox"/>	Shrader, A		Front
Total			

1. Click the Assign button at the bottom of the Task Properties under the Assignments section.
2. Check the box next to the resources / roles you want to assign
3. Click *Assign or Assign and Select More*

Project: Test Project | Task: Kickoff Meeting - Assign Resources

— Filter: None ▾

Resource/Role Name

Resource/Role ID

Resource OBS

Resource OBS - Filter Mode ▾

Project Role

<input type="checkbox"/>	Resource/Role	Resource/Role ID	Pr
<input checked="" type="checkbox"/>	Project Manager	csk.projectManager	Project M
<input type="checkbox"/>	Project Manager (2)	csk.projectManager	Project M

Note: The resource names appear in the *Assignments* section of the *Task Properties* page

Part VI: Project Sub-Objects

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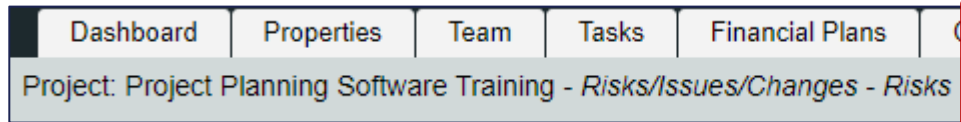
Risks and Issues

- Risks and Issues can be identified at any time during a project's lifecycle
- A Risk can escalate to an Issue, and an Issue can downgrade to a Risk
- Both Risks and Issues can create Change Requests
- You can also enter a Change Request from scratch
- Risks can tie back to the Risk Subpage, allowing CA PPM to determine the overall project risk score
- You can link Risks and Issues to Tasks, Response Strategy, Action Items, etc.



Risks and Issues

- Navigate to the Risks/Issues/Changes tab within the project (the Risks sub-page appears by default)



- Risks, Issues and Changes fields and pages are simplified in Base Configuration

A screenshot of the 'Create Risk' form in the Rego system. The form is titled 'Project: Project Planning Software Training - Create Risk'. It includes fields for 'Scope Creep', 'RI0028', 'Objectives', 'Status' (Open), 'Owner' (McGuire, Noreen), 'Target Resolution Date' (2/1/2018), 'Priority' (Low), 'Description' (Omissions in scope), 'Impact Description', 'Document' (Choose File), 'Probability' (Low), 'Impact' (High), 'Response Type' (Watch), and 'Impact Date' (2/1/2018). There are buttons for 'Save', 'Save And Return', and 'Return'. A legend at the bottom indicates: * = Required, + = Enter Once, * = Unique.

Change Requests

Change Requests are a critical component of project management.

Project: AA Test User IS Project - *Risks/Issues/Changes - Change Requests*

Filter: System Default ▼											
<input type="checkbox"/>	Change Request	ID	Status	Owner	Priority	Review Date	Expected Close Date ▲	Closure Date	Change in Cost	Change in Schedule	Change in Resources
<input type="checkbox"/>	New Change Request	CR000002	Open	Ensinger, Rob	◆	2/15/18	3/1/18		20,000.00	14	2

Key Attributes in the OOTB Change Request Configuration

- Change in Cost
- Change in Schedule
- Change in Resources

Change Requests

Change Requests are built to have multiple levels of review and approval.







Key fields include:

- Next Review Date
- Expected Close Date
- Close Date
- Date Assessed
- Approved Date

Next Review Date	2/15/2018	
Expected Close Date	3/1/2018	
Close Date		

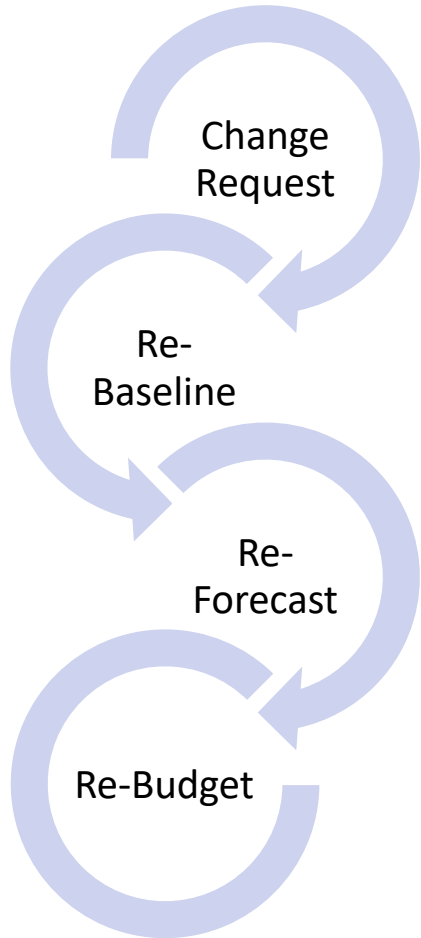
To manage multiple levels of review

- Assessor
- Approved By

Assessor	<input type="text"/>	 	Approved By	Ensinger, Rob	 
Date Assessed	<input type="text"/>		Date Approved	<input type="text"/>	

Change Request – Best Practices

An approved Change Request should drive creating new Baseline, new Cost Plan and new approved Budget.



Project Dashboard All Tasks All Assignments All Issues All Risks All Change Requests										
Project Views: All Change Requests										
All Change Requests										
Project ID	Project	Change Request ID	Change Request	Category		Assigned To	Status	Priority	Expected Closure Date	Days Open
PR000001	CA PPM Implementation	CR000001	This is a change	Scope	✉	Administrator, PPM	Open	◆	1/22/18	31
PR000290	AA Test User IS Project	CR000002	New Change Request	Cost	✉	Ensinger, Rob	Open	◆	3/1/18	9

Displaying 1 - 2 of 2

Decision Log

A Decision Log sub-object is a great addition to your project management toolkit to capture important decisions made in the execution of your project.

Common Elements

- Description
- Decision Type
- Final Decision
- Pros/Cons
- Approved
- Approvers

Description	ID	Decision Type	Final Decision	Approved	Approvers
LOCATION-DETERMINE DEFAULT - SINGLE LOCATION	00000018	Solution	DEFERRED UNTIL FUNCTIONAL DESIGN PHASE	No	
Forecasting Process - Need to determine how to deal with ETC in the PAST	00000017	Solution	DEFERRED UNTIL FUNCTIONAL DESIGN PHASE	No	

Project: AA Test User IS Project - Create Decision Log

General *

Summary of Decision Description

Pros & Cons

Pros Cons

Recommendation & Notes

Recommendation Notes

Save Save And Return Return

* = Required

Lessons Learned

Capturing Lessons Learned is a key element to enhancing collaboration and knowledge sharing across projects.

The Rego Lessons Learned sub-object is a great method for capturing lessons learned and simple portlets allow for filtering and searching all Lessons from all projects.

Key Fields

- Name
- Lesson Category
 - Development
 - Communication
 - Infrastructure
- Lesson Type
 - Best Practice
 - Improvement
 - Success
 - Warning
- Description

The screenshot shows a 'General' tab for a lesson learned entry. The fields are as follows:

- Name:** Development Speed
- ID:** 00000001
- Lesson Category:** Development
- Lesson Type:** Success
- Description:** Development timeframes were drastically reduced by focusing on project priorities

Investment Name	ID	Description	Category	Best Practice / Improvement	Actions / Recommendations	Impact
QTI-Quest / Dell Upgrade	LLL00292	The fact that we currently cannot move vendor funding from one year to the other put a lot of pressure on billing the vendor before the end of the year. Also, vendor, due to their internal procedures, could not bill us the whole amount in the last year. (This item has been brought up by the Project Sponsor)	Vendor	Improvement Opportunity	Present this scenario at the appropriate forum to allow for vendor funding to carry on to the next year.	Budget. Having to return vendor funding for the last year and with no funds for this year we ended up with \$1,439 under budget.
QTI-Quest / Dell Upgrade	LLL00291		Vendor	Improvement Opportunity	Present this scenario to the appropriate forum to streamline vendor onboarding process.	Schedule and Budget.

Project Level Action Items

A Rego alternative to CA PPM Out of the Box Action items. Sub-Object on the Project to Identify Project Specific Actions

Benefits

- Available inside Project for PM to Manage
- Easily Extract/Share Action Item List for Entire Projects
- Simple Portlet to Review Open Action Items Across Projects
- Great way to manage sub task level actions

Project	Subject	Created By	Assigned To	Due Date▲	Prtly
CER - Test Project 1	CER Test AI from Project	Administrator, Niku	Reynolds, Clayton	8/22/13	✖
Wiki Service Improvement	Architecture Orientation	Admin, Rego	User, Simple	3/2/15	⚠
2015 SharePoint Project	Initial Discussions	Admin, Rego	Chourey, Sangeet; Dateno, George	3/2/15	
2015 SharePoint Project	SharePoint Plan Review	Admin, Rego	Chourey, Sangeet	3/2/15	⚠
2015 Integration Project	Design Review Meeting	Admin, Rego	Anyra, Vishal; Chouhan, Vipin; Drees, Dan	3/12/15	
Budget Allocation 2015	Core Expenditure Review	Admin, Rego	Wachsmann, David	3/13/15	
2015 Integration Project	Demo Build	Admin, Rego	Chouhan, Vipin	3/27/15	
Wiki Service Improvement	Jump to CSI (Continual Service Improvement)	Admin, Rego	Wright, Frank	3/27/15	⚠
Budget Allocation 2015	Monitor Financial Activities	Admin, Rego	User, Simple	4/17/15	✖

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Part VII: Financial Plans

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Overview of Financial Plans

- Detailed financial planning allows for the estimation of costs and/or funding of investments (projects) using cost plans. These plans can then be submitted and approval for funding using budget plans
 - Cost Plans:
 - Are the first step in utilizing CA PPM financial plans
 - Time scaled view of the forecasted cost of the investment, but it will also show the actual costs as they are incurred. Forecast can be grouped by financial fields like resource class, cost type, transaction class, etc.
 - Budget Plans:
 - A cost plan becomes a budget plan when approved - the “baseline” for financials
 - Approved budget plans are READ-ONLY ‘snapshots’ of the submitted cost plan
 - Benefit Plans:
 - Time scaled view of the forecasted and realized benefits of the investment. Benefits are listed individually, but categorized into type

Part VIII: Project Views

Dashboard and Portlet views

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Base Configuration Portlets

- Under the Project Views link you will find several tabs with project focused data
 - Project Views
 - All tasks
 - All Assignments
 - All Issues
 - All Risks
 - All Change Requests

The screenshot displays the Rego project management interface. The top navigation bar includes 'HOME', 'ADMINISTRATION', and 'FAVORITES'. Below this, a sidebar on the left lists various portlets: 'Dashboards', 'Work Management', 'Demand Management', and 'Resource Management'. The 'Project Views' link is highlighted with a red box. The main content area shows the 'Project Views: All Assignments' portlet, which includes a tabbed interface with 'Project Views', 'All Tasks', 'All Assignments', 'All Issues', 'All Risks', and 'All Change Requests'. The 'All Assignments' tab is active, displaying a form for filtering assignments and a table of assignment data.

Filter Form:

- Resource:
- Resource Manager:
- Project Manager:
- Project Name:
- Project ID:
- Project Is Active:
- Project OBS:
- Resource OBS:
- Start: to
- Finish: to
- Assignment Status:
- Task Status:
- Is Late:
- Resource / Role:
- Resource Active:

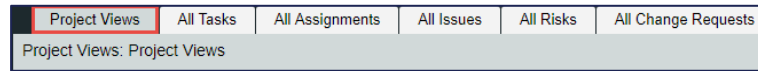
Buttons: Filter, Show All, Save Filter, Clear

Table:

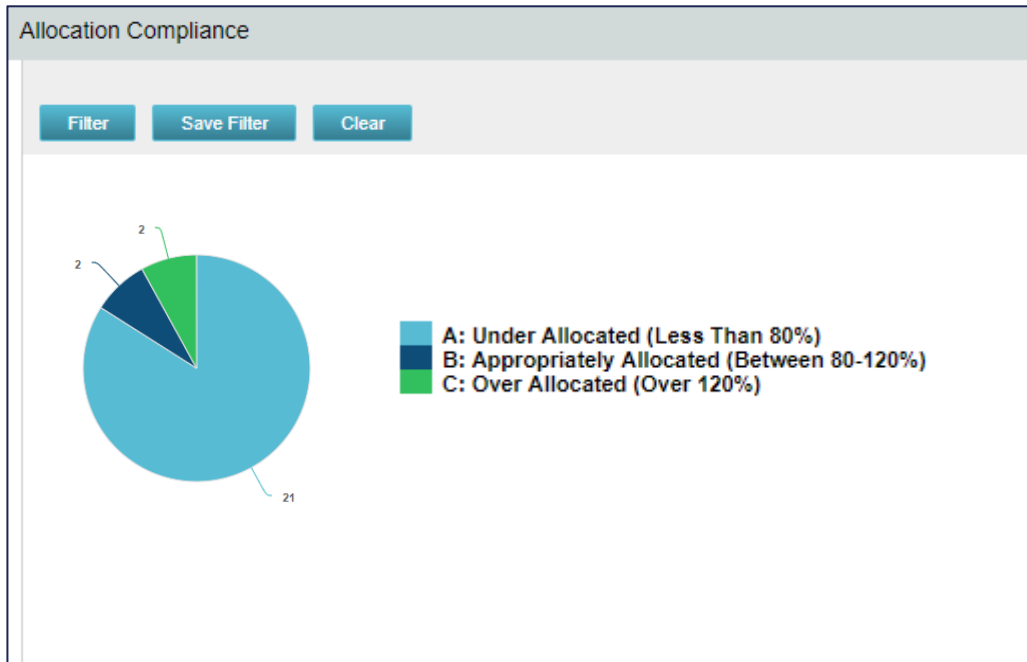
Project Name	Project ID	Task Name	Task Status	Resource	Assignment Status	Start Date	Finish Date	Actuals	ETC	Total Effort	Days Late	Days Old
A Fantastic Project	PR000011	Define customers and requirements	Started	Bolin, Rod	Not Started	11/2/15	12/14/15	0	248	248		781
OWB Project	PR000021	Define Scope Change and Control Process	Not Started	Project Manager	Not Started	1/29/18	2/2/18	0	40	40		0

Base Configuration Portlets

- Project Views tab



- The Allocation Compliance List portlet is used in conjunction with the Allocation Compliance Pie Chart. Once the user selects a specific section of the chart, the Allocation Compliance List will display a list of resources fulfilling that selection



- Additional filter criteria can be used in the Allocation Compliance List

Allocation Compliance List

Allocated

Allocation %

Availability

Resource Internal ID

Resource Manager

Resource Name

Filter Show All Save Filter Clear

Resource Name ▲	Resource Manager	Availability	Allocated	Allocation %
Bonham, Jessica	Administrator, PPM	512	640.12	125.0
Joshi, Navdeep	Administrator, PPM	512	632.00	123.4
Total Availability and Allocation & Average %		1,024	1,272.12	124.2

Displaying 1 - 2 of 2

Base Configuration Portlets

- Portlets on the Personal/General page (default home page)
 - My Projects
 - My Missing Time
 - Missing Time by Project Manager

The screenshot displays the 'Personal' portlet configuration page. The top navigation bar includes 'HOME', 'ADMINISTRATION', and 'FAVORITES'. Below this, a sidebar menu shows 'Dashboards' with 'Personal' highlighted. The main content area is titled 'Overview: General' and contains three portlets:

- My Projects**: A table with columns for Project, Stage, Status, Team, Gantt, and Documents. It shows one project: 'Project Planning Software Training'. Below the table are buttons for 'New' and 'New from Template'.
- My Missing Time**: A form with input fields for 'Actual Days', 'Actual Hours', 'Period Start', and 'Stop Light'. It includes buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear'. Below the form, it states 'There are no items to display'.
- Missing Time by Project Manager**: A table with columns for Resource Name, Stoplight, Status, Period Start, Resource Manager, Actual Hours, and Actual Days. It shows one entry for 'Bolin, Rod' with a red stoplight icon, 'Not Created' status, and '10/9/17' period start. The resource manager is 'Joshi, Navdeep', and both actual hours and days are 0.

Part IX: Project Management in the Modern UX

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Modern UX Overview

- The Modern UX provides a new way for PMs and Team Members to perform the majority of their Project Management-related activities
- Modern UX became available with version 15, and functionality has been added/improved with each release of 15.1 through 15.4. Notes on subsequent slides are related to release 15.4

Modern UX 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.	

Blueprints

Blueprints (1)

- Project configuration is available via the blueprint.

The screenshot shows a software interface with a sidebar on the left. The sidebar contains several icons, and the icon representing a blueprint (a document with a grid) is highlighted with a red box. To the right of the sidebar, a dropdown menu is open, displaying two options: 'Customized Blueprint' and 'Standard Project'. The 'Customized Blueprint' option is also highlighted with a red box. The 'Standard Project' option has a 'DEFAULT' label next to it. In the background, a table is visible with columns for NAME, LAST USED, PROJECTS USI..., and MO. The table contains two rows: one for 'Customized Blueprint' and one for 'Standard Project'.

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

Blueprints (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 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 includes a search bar, an 'ADD SECTION' button, and a list of fields: '% COMPLETE', 'ACTIVE', 'ACTUALS', 'ASSIGNMENT POOL *', 'BANNER COLOR', and 'BLUEPRINT'. On the right side, there is a 'PROJECT SUMMARY' section with fields for 'NAME *' and 'PROJECT TYPE'. The 'BLUEPRINT' field is also visible at the bottom right.

Blueprints (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.

Properties Auto-numbering

Object: Project | Attribute: Test Custom Attribute - Object Attribute

Attribute Name [Test Custom Attribute]

Attribute ID rego_test_cust

Description

Data Type String

Default Value

Maximum Size 20
(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 ☐
(In order to make an attribute read-only a default must be selected)

API Attribute ID regotestcust
(This is the attribute id used in the REST API. Set this to make the attribute available via the REST API.)

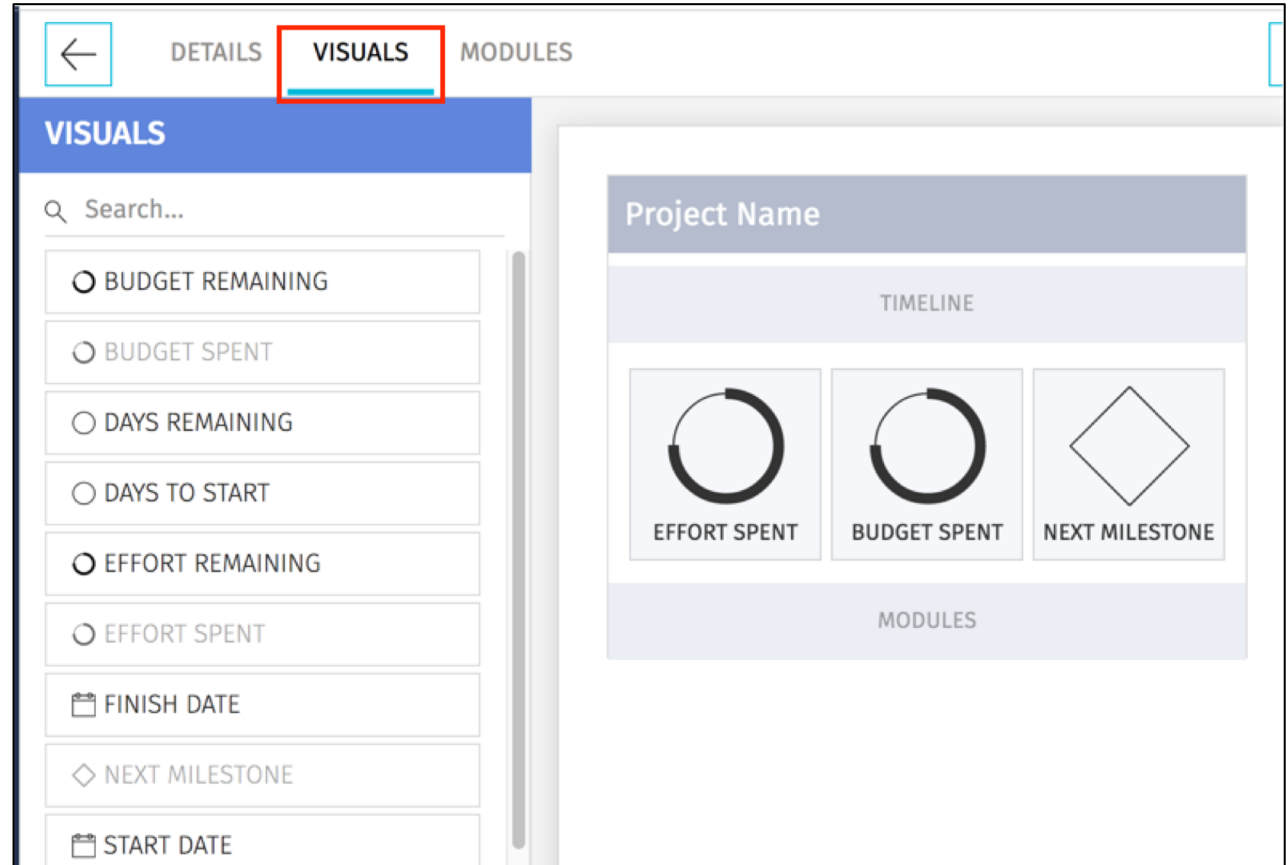
Include in the Data Warehouse ☐

Save Save And Return Return

Blueprints (4)

2. Visuals:

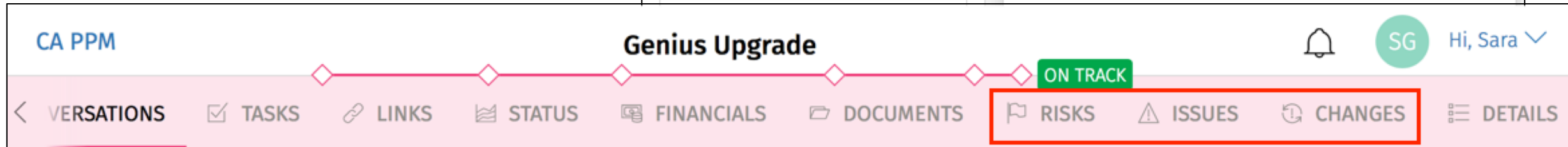
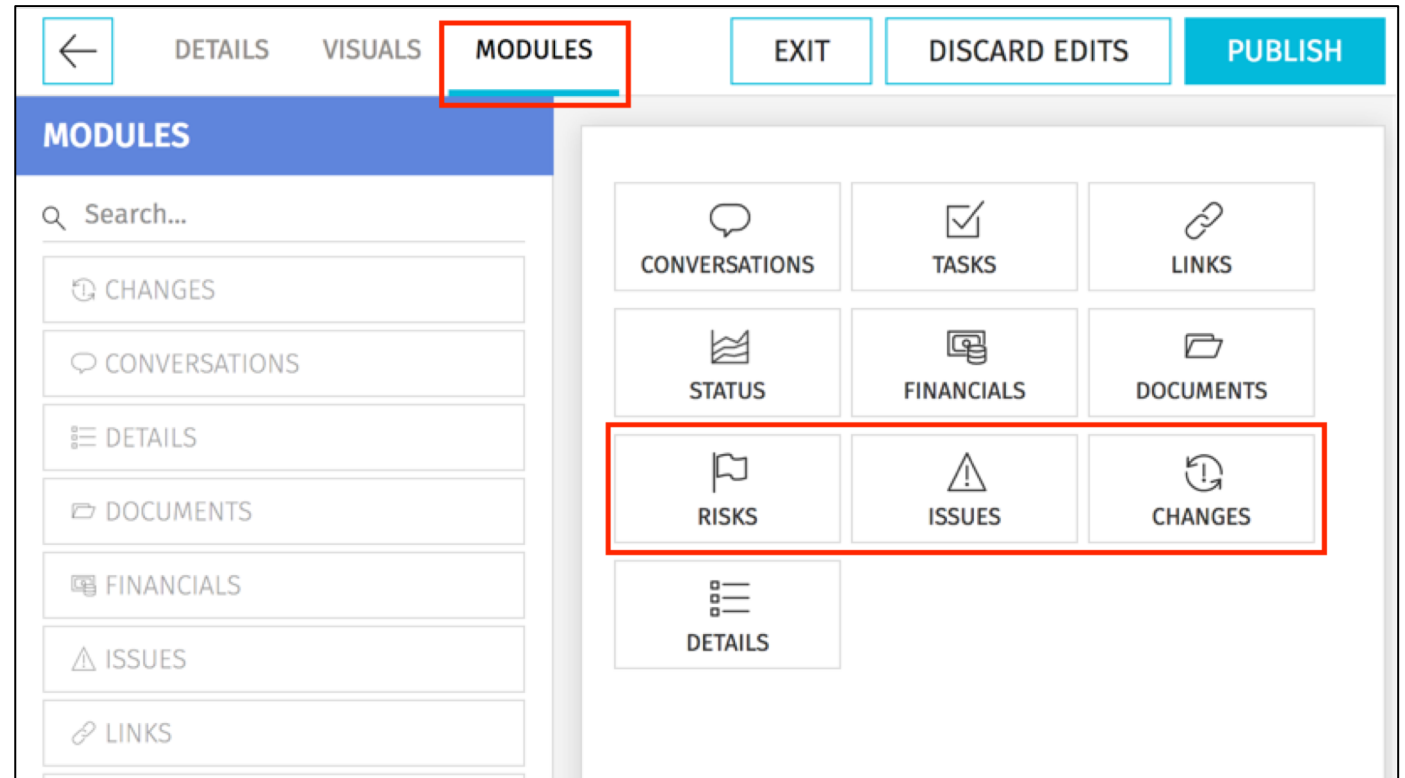
- Customize the metrics to be displayed in the Project Tile on the main *Projects* page.
- Modify via drag and drop.



Blueprints (5)

3. Modules:

- Risks, Issues and Changes now available as modules (15.4). 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



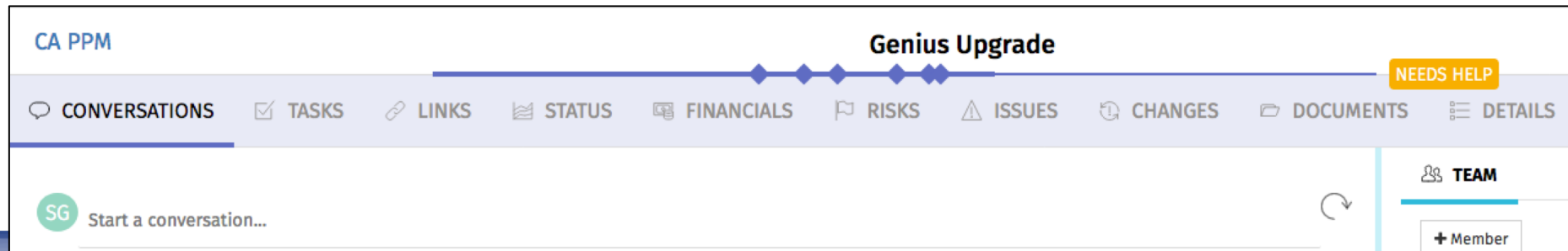
Blueprints (6)

- Associate Project templates with the customized blueprint.
- Projects created from that template will then inherit the blueprint's configuration.

Search or filter...				
NAME	LAST USED	PROJECTS...	MODIFI	
Customized Blueprint		0	Sara G	
Development Template (MSP)				
Major Project Template				
Standard Project	Aug 7, 2017	66	CA PPM	
Application Change Template				
Application COTS Template				
Development Template (Workbenc...				
Infrastructure Deployment Templ...				

Project Tabs

- Conversations: Threaded conversations, and Team tab equivalent
 - Can only add resources from the Project – No roles
 - No resource allocation details
- Tasks: Project WBS
 - Supports Only Two level WBS
 - Gantt or Task Board View
- Links: Create links to Classic, or to other locations as necessary
- Status: Status reports
- Financials: Create, Edit, Delete Cost Plans (15.4)
- Risks/Issues/Changes: Create and edit R/I/C
- Documents: Project Document Management
- Details: Project attributes, as customized via the blueprint



Questions?



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Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- 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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