
regoUniversity 2018
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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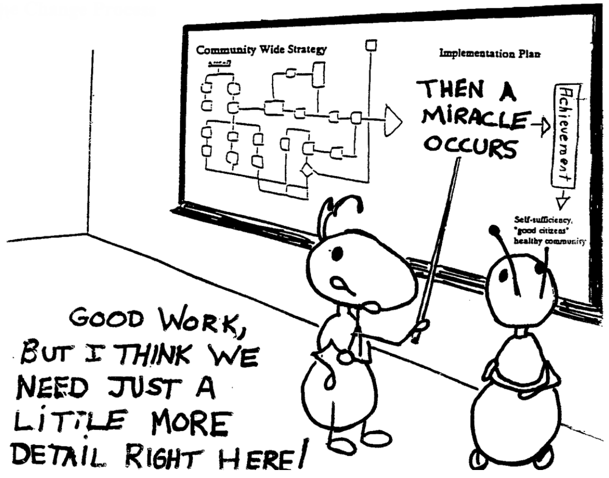
Rego Base Configuration

- 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 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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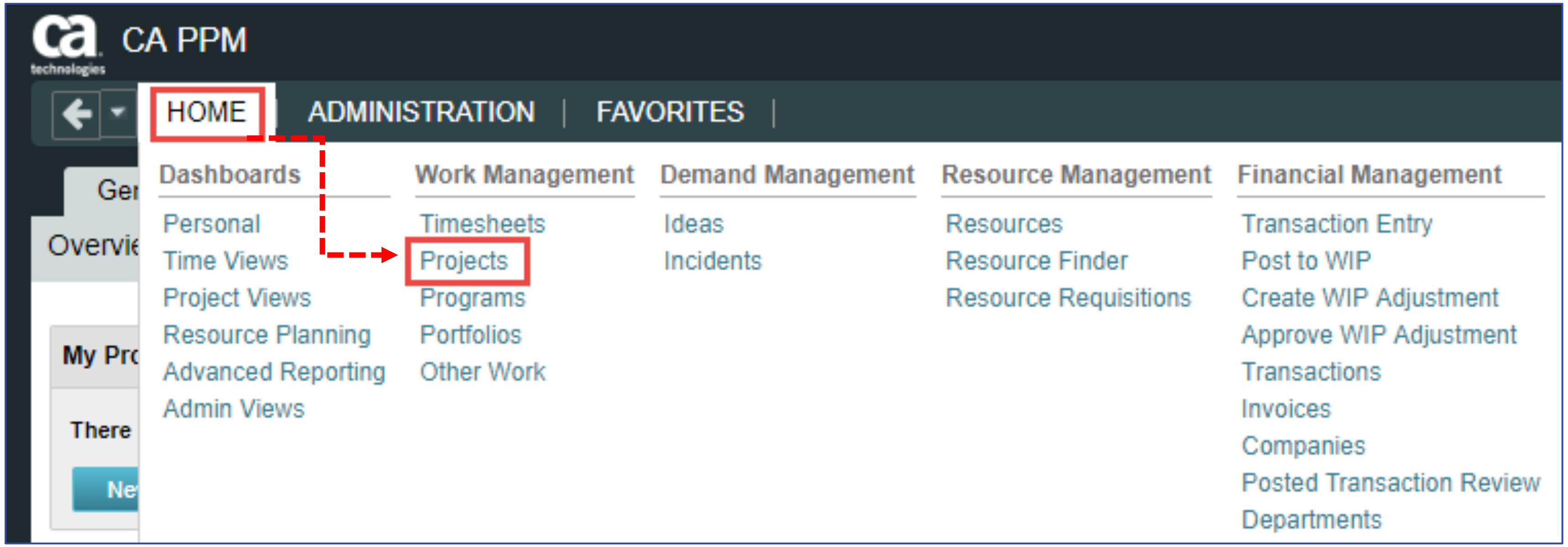
Accessing Projects

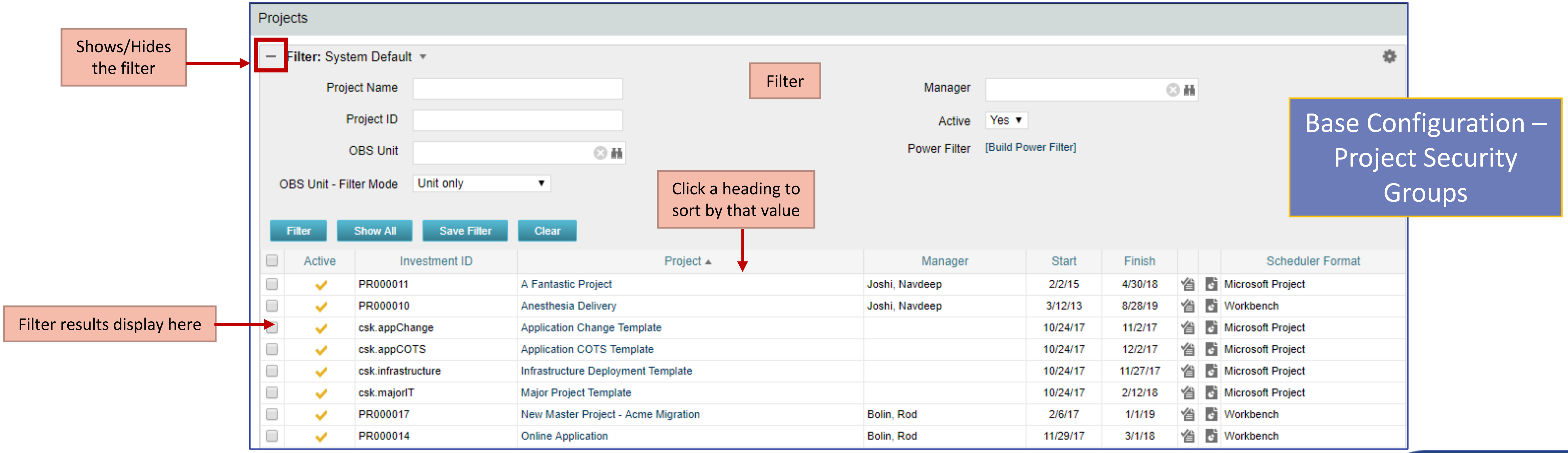
- To access projects, hover over Home, then click Projects under Work Management
  - Note that navigation bar links and section headers may be different depending on how your CA PPM administrator has configured the interface
  - Also be aware that access depends on having the correct security rights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



Project List View

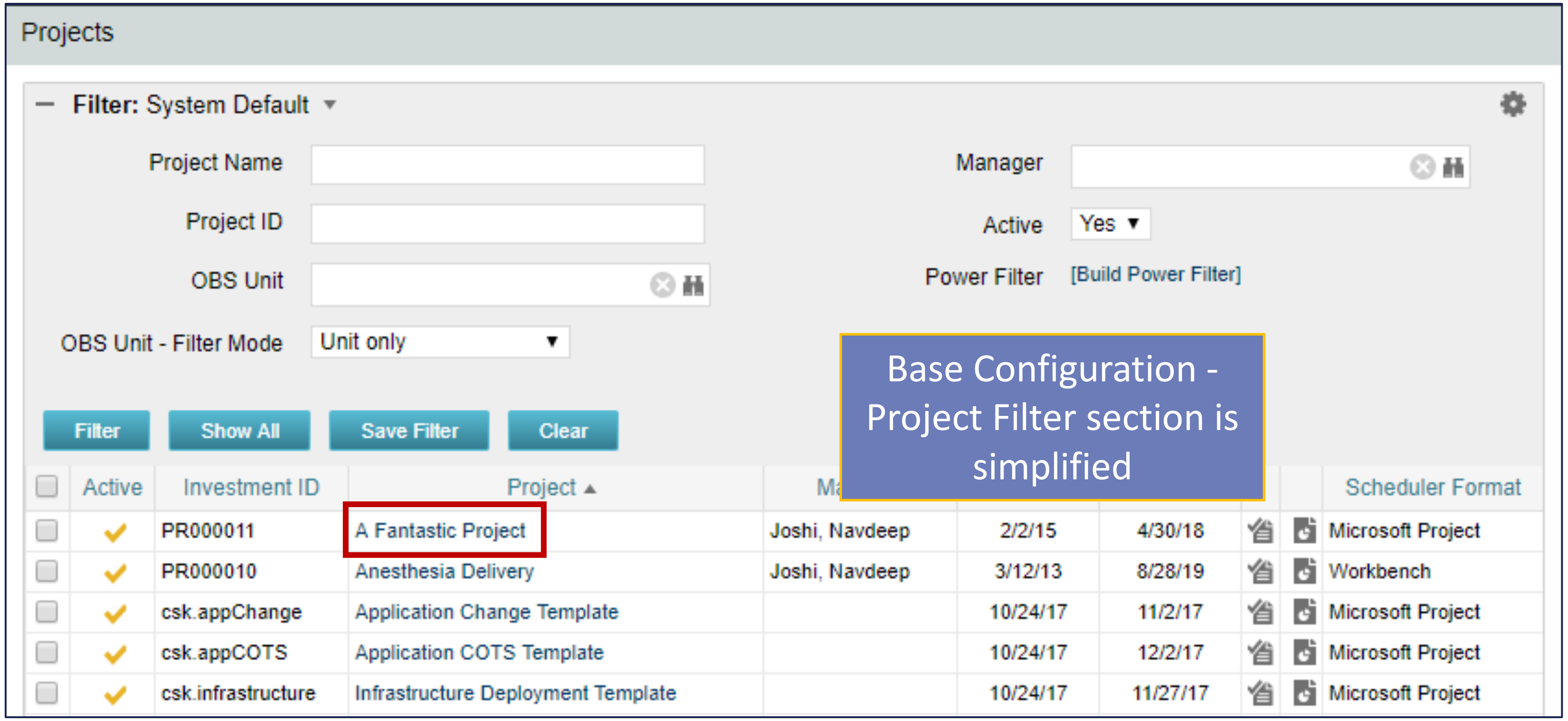
Project List view displays all the project the end user has access to and is divided into two sections

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



Accessing Projects

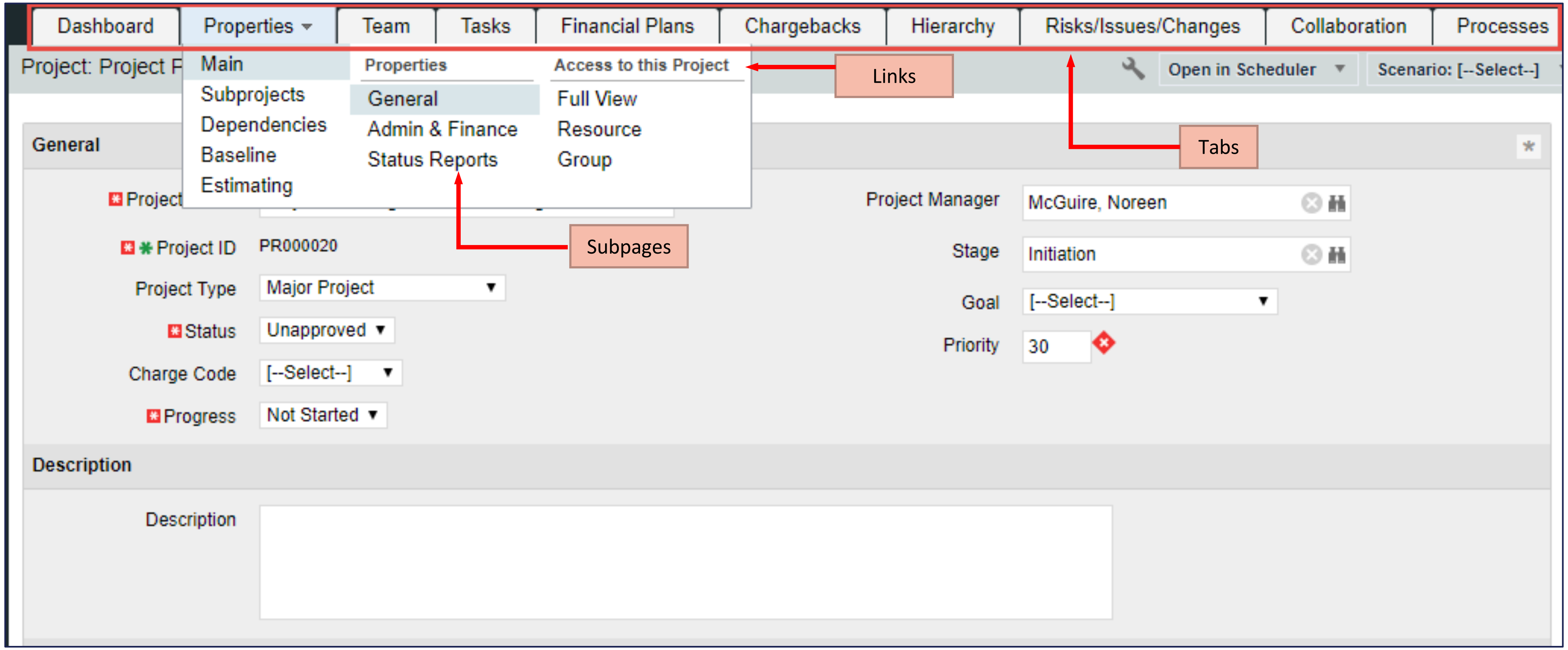
1. Home > Work Management > Projects
2. Click on the **+ sign** to expand the filter
3. Enter **filter criteria** (optional)
4. Click **Filter**
5. Click on the **Project** in the list to open



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

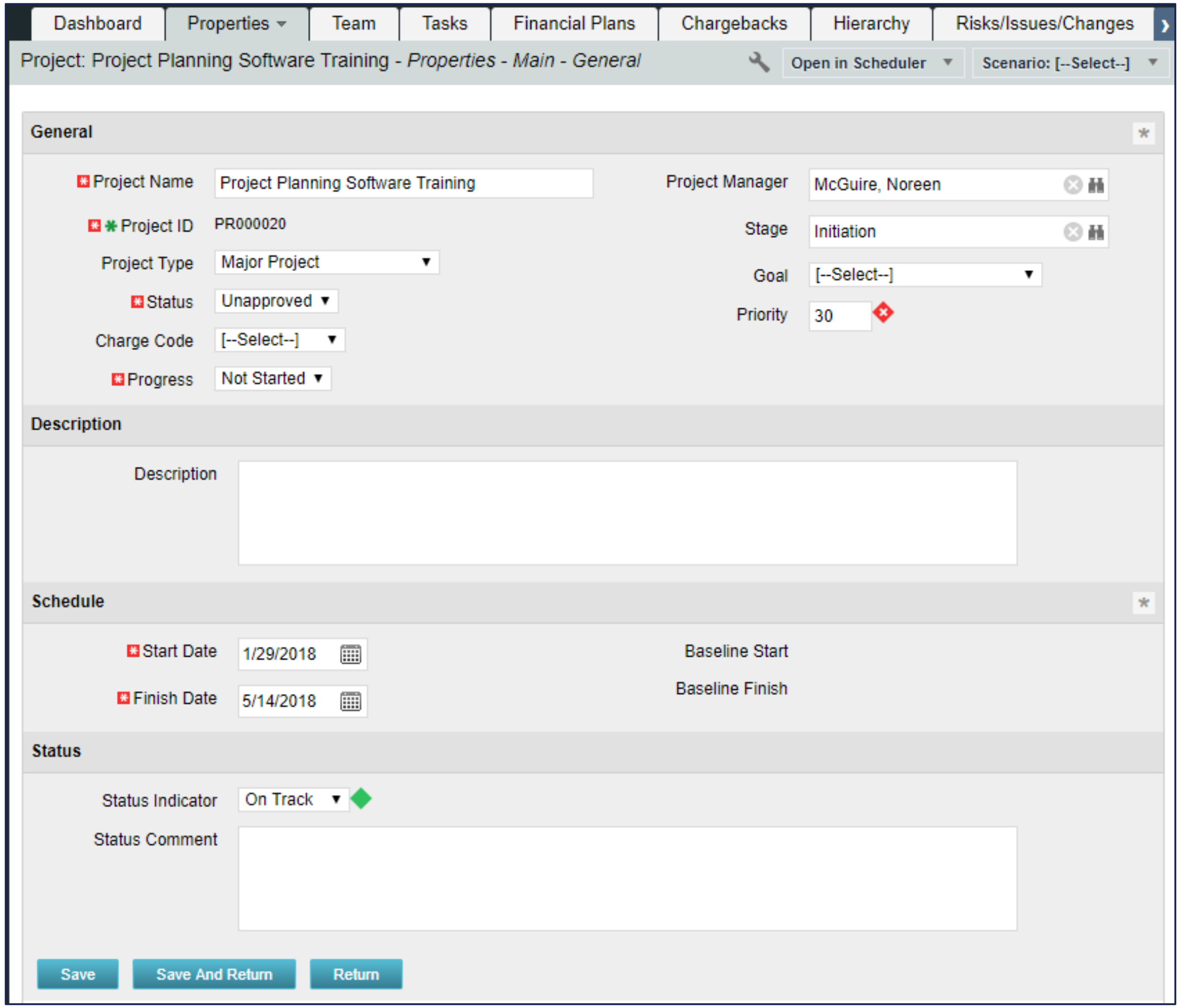
Project Properties and Subpages

- 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



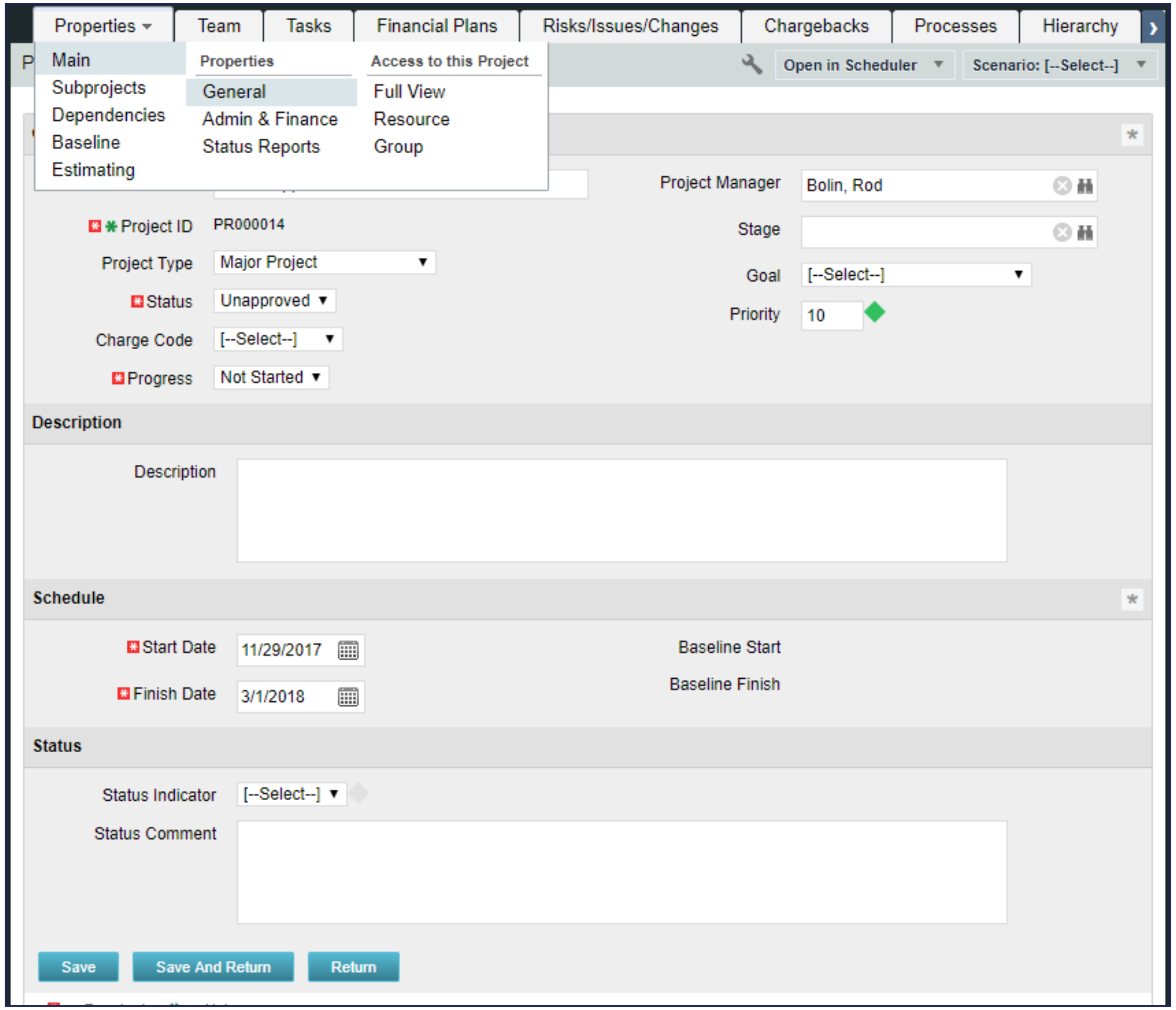
Project Security

- 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



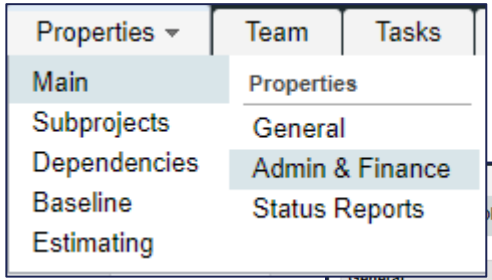
Project Properties

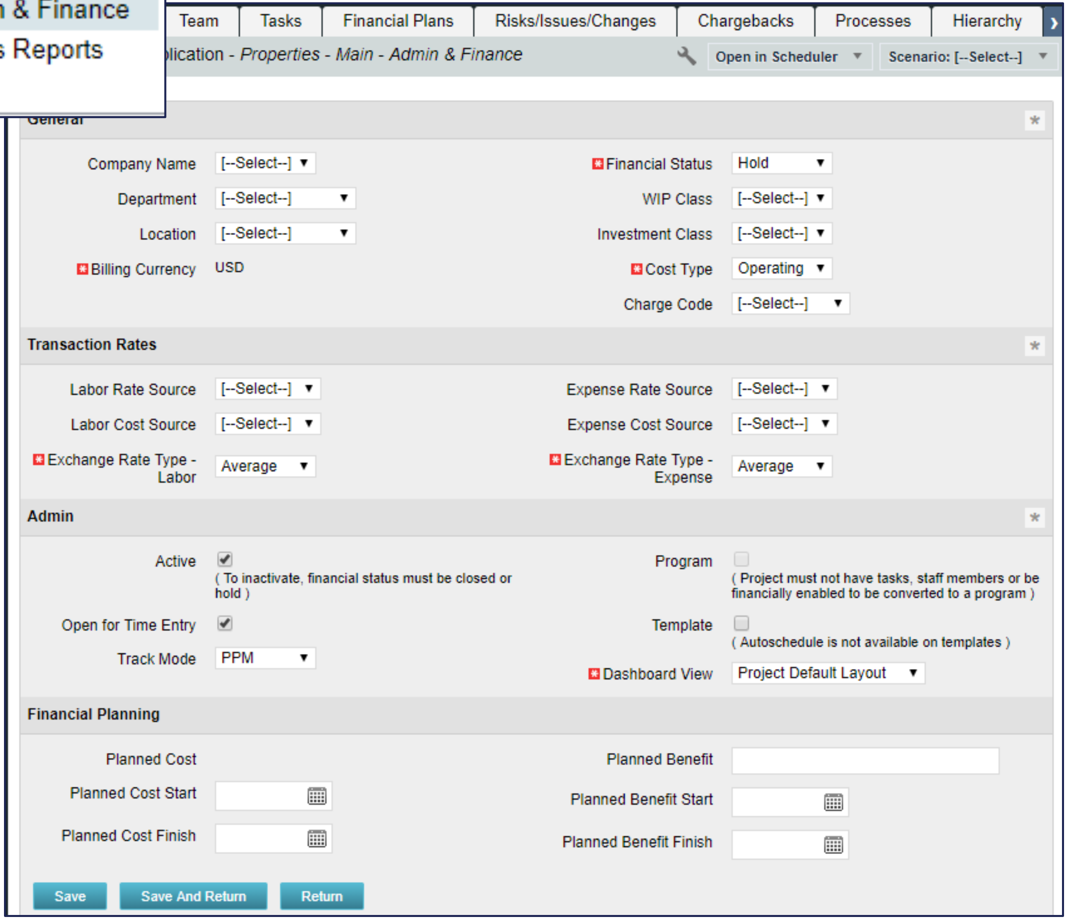
- Base Configuration - General
  - Schedule and Status sections
  - Attributes renamed, hidden or moved to other subpages
  - Defaults set
  - Fields resized
  - Properties tab dropdown updated with concise subpage options



Project Properties

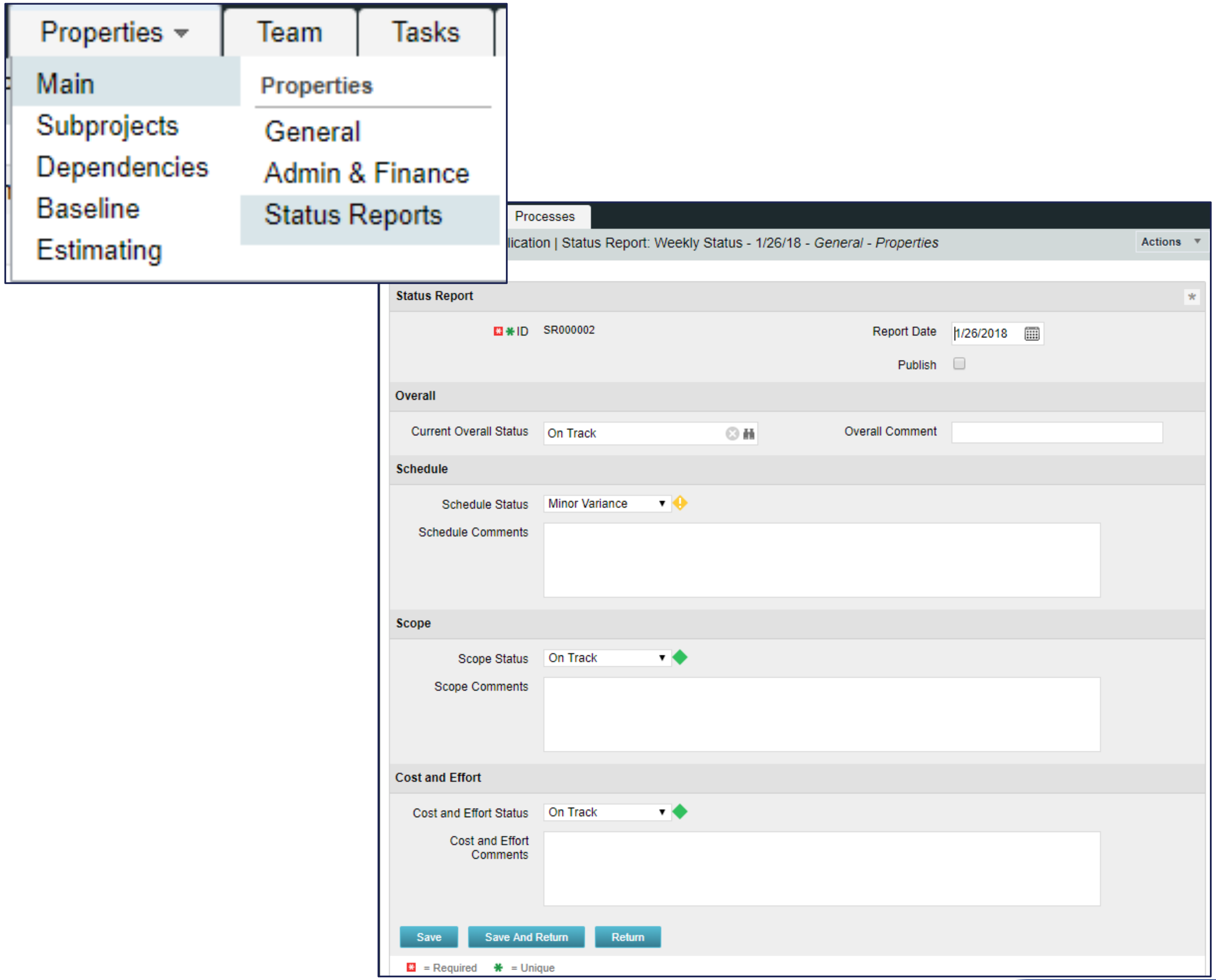
- Admin & Finance Subpage
  - Classifications defined:
    - Resource Class
    - Company Class
    - WIP Class
    - Investment Class
    - Transaction Class
  - Transaction Rates
    - Section simplified
    - Financial Cost & Rate Matrix setup





Project Properties

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



Part III:
Staffing the Project

The Team Tab

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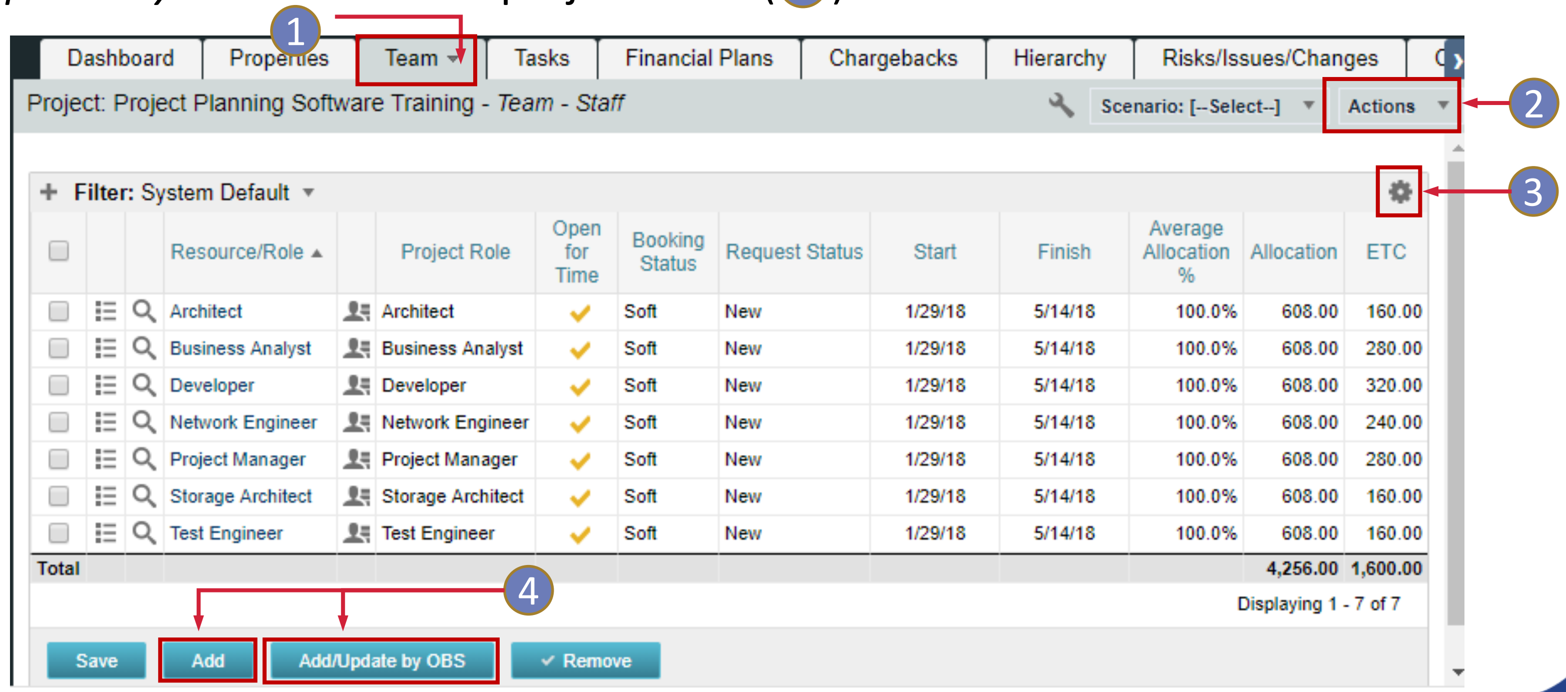
Team Tab

- 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)



Part IV: Work Breakdown Structure

The Tasks Tab

Task Properties

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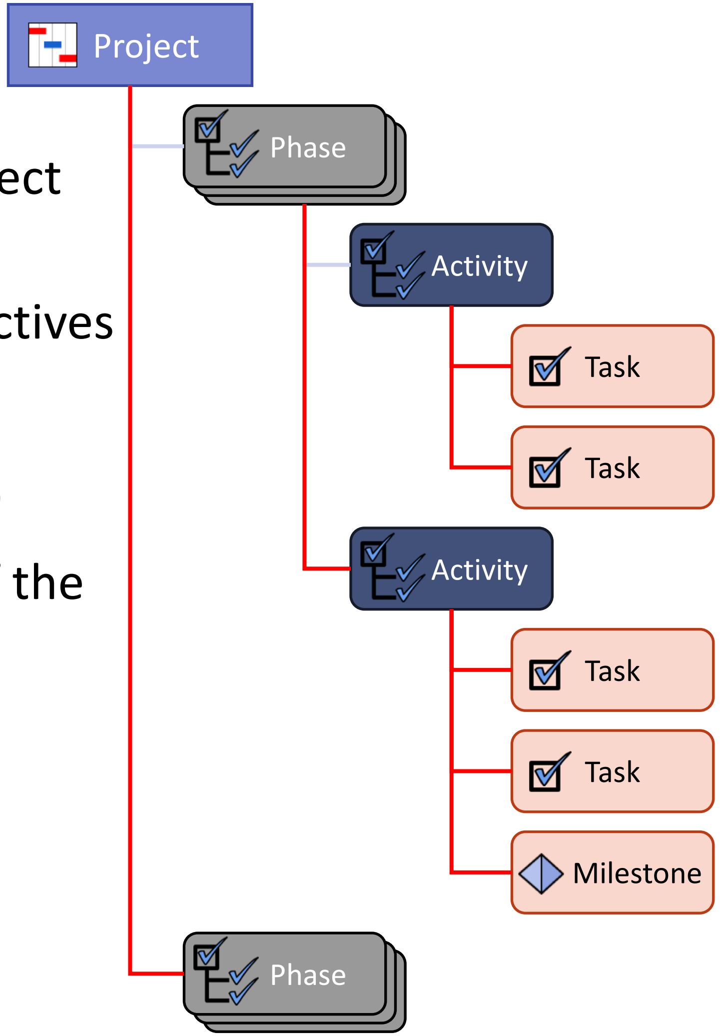
Work Breakdown Structure

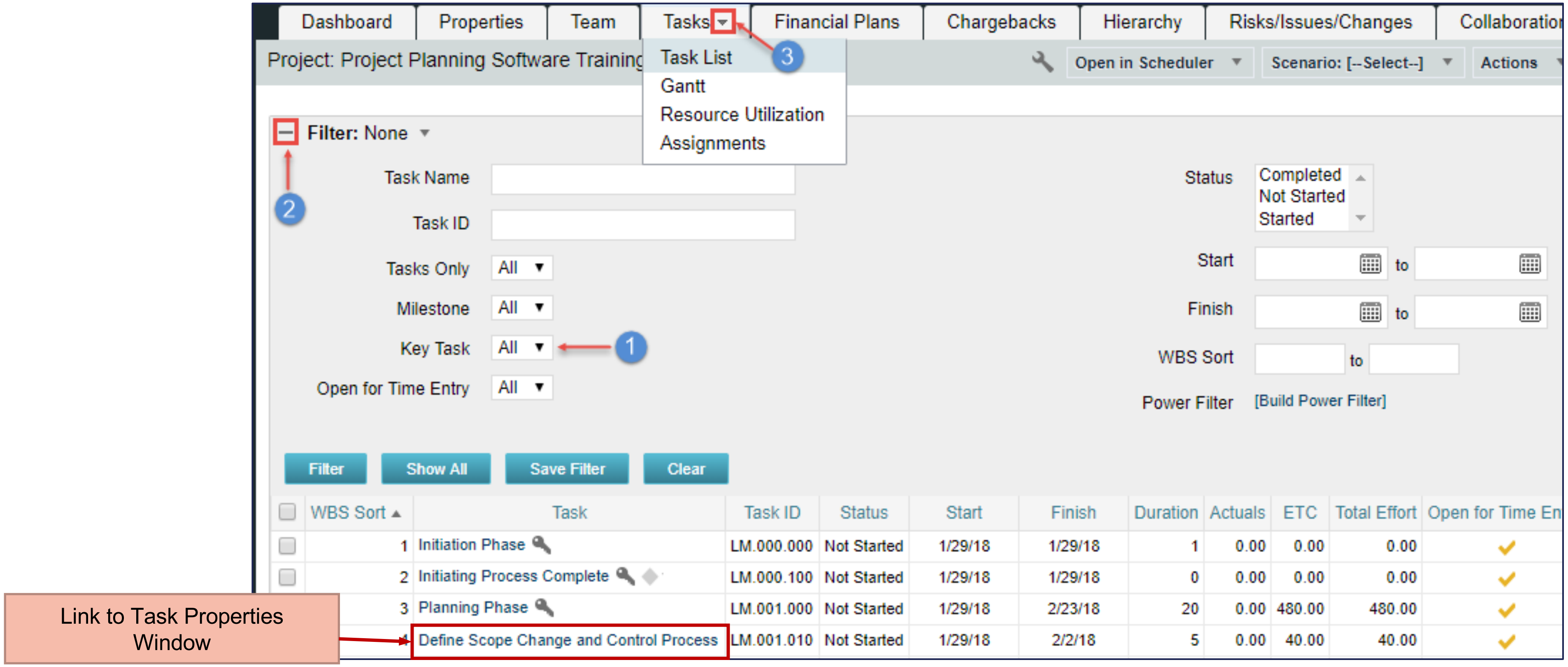
- WBS typically consists of phases, activities, and tasks
  - Phases are the major steps required to achieve a project goal
  - Activities are established to complete the phase objectives
  - Activities are split into tasks to break up the work
  - Milestones have no duration and no work effort (ETC)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



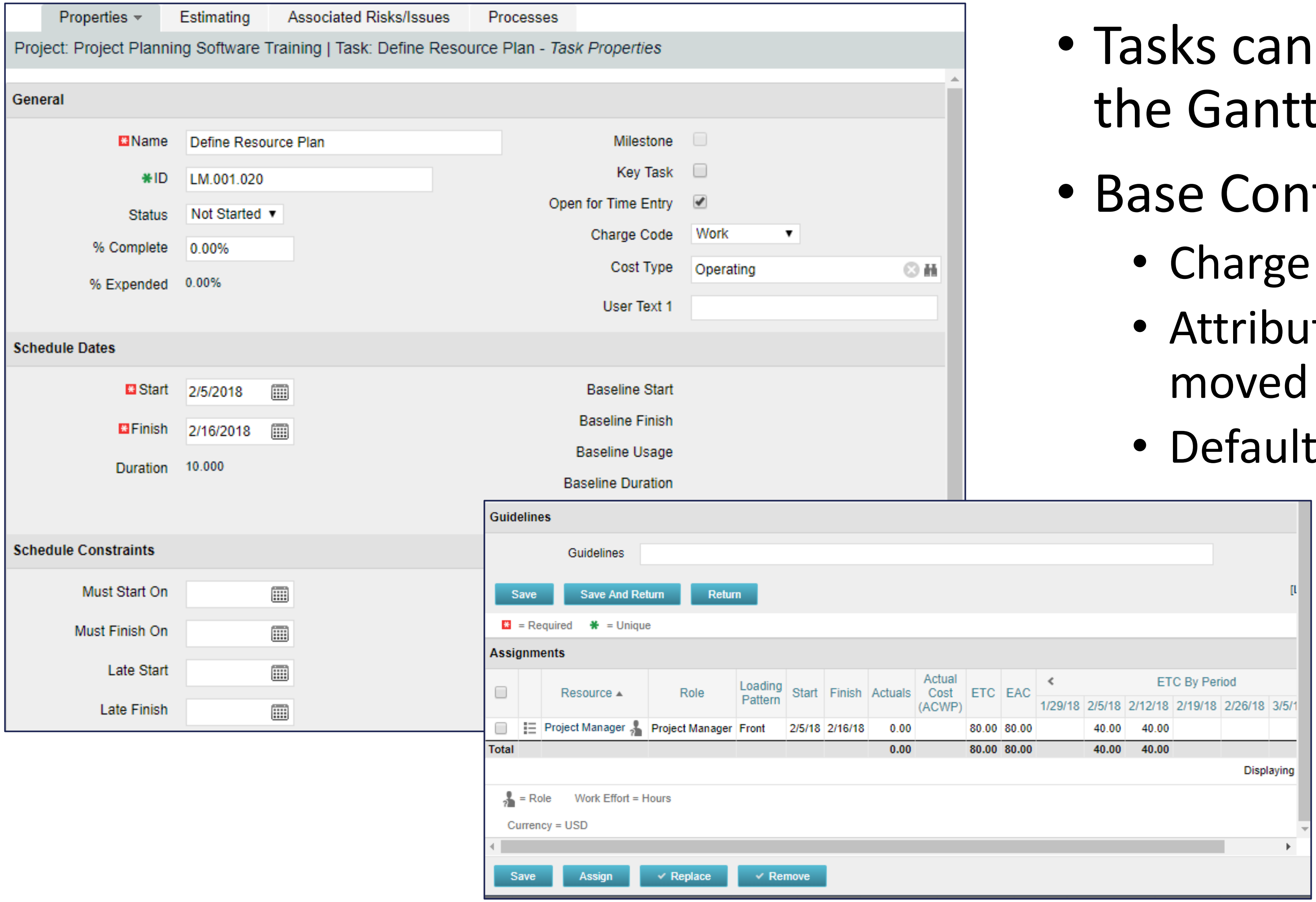
Tasks Tab

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)



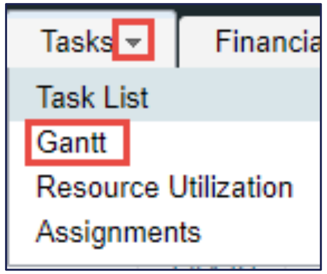
Task Properties

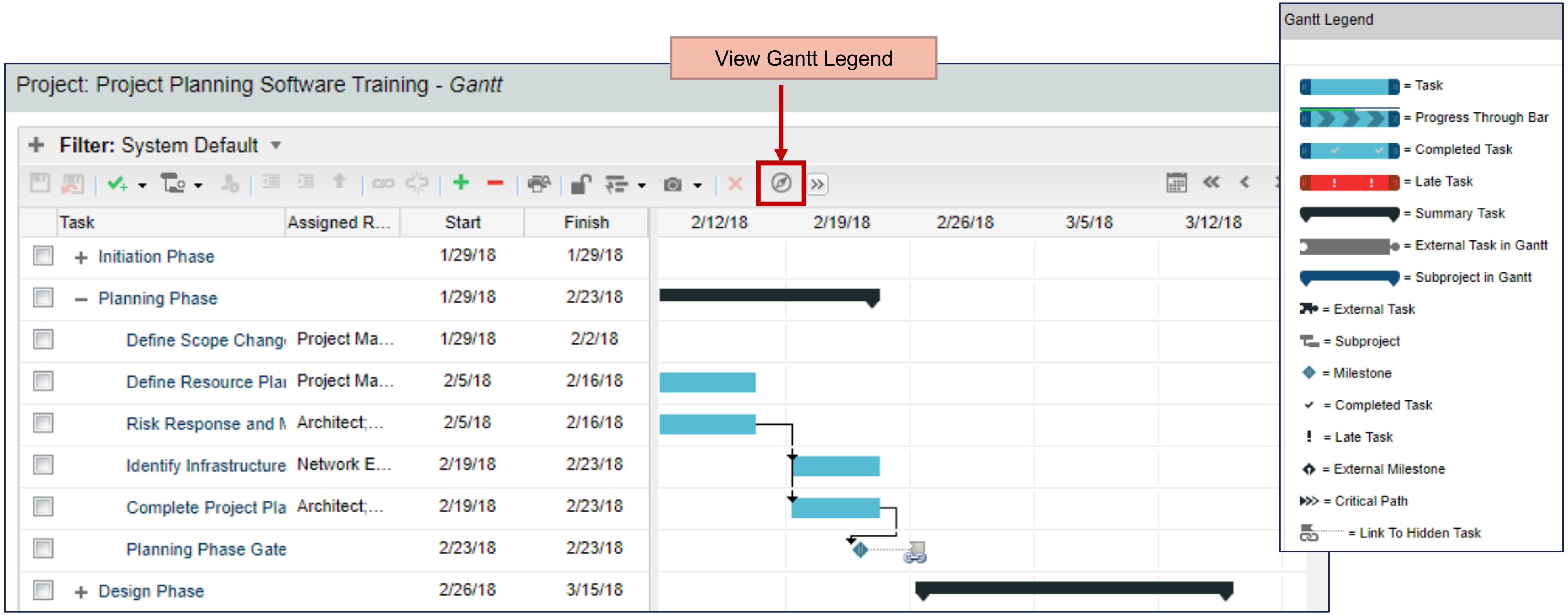


- Tasks can be created within Clarity, the Gantt View or MS Project
- Base Configuration
  - Charge Codes, Cost Types defined
  - Attributes renamed, hidden or moved to other subpages
  - Defaults set

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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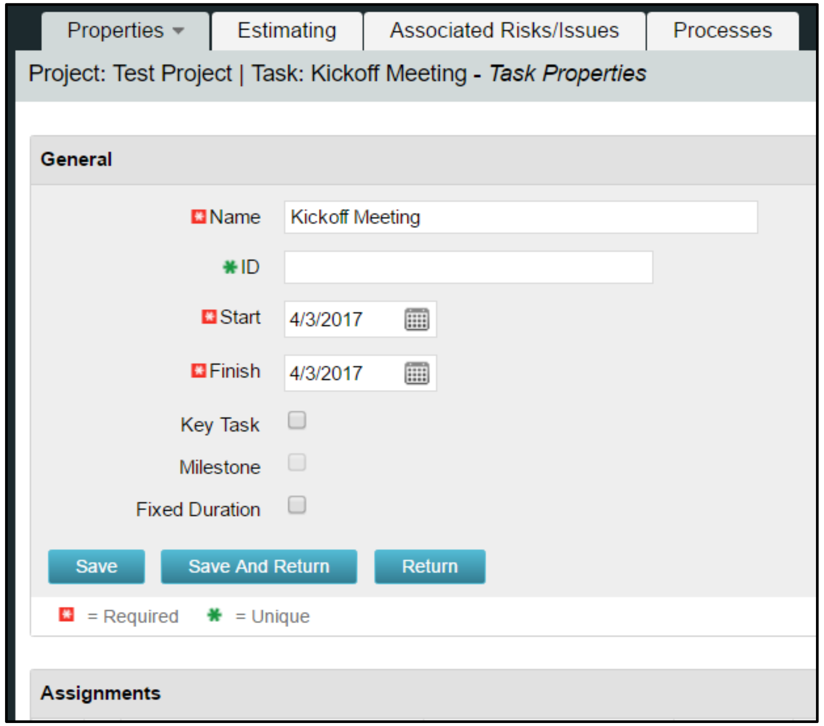
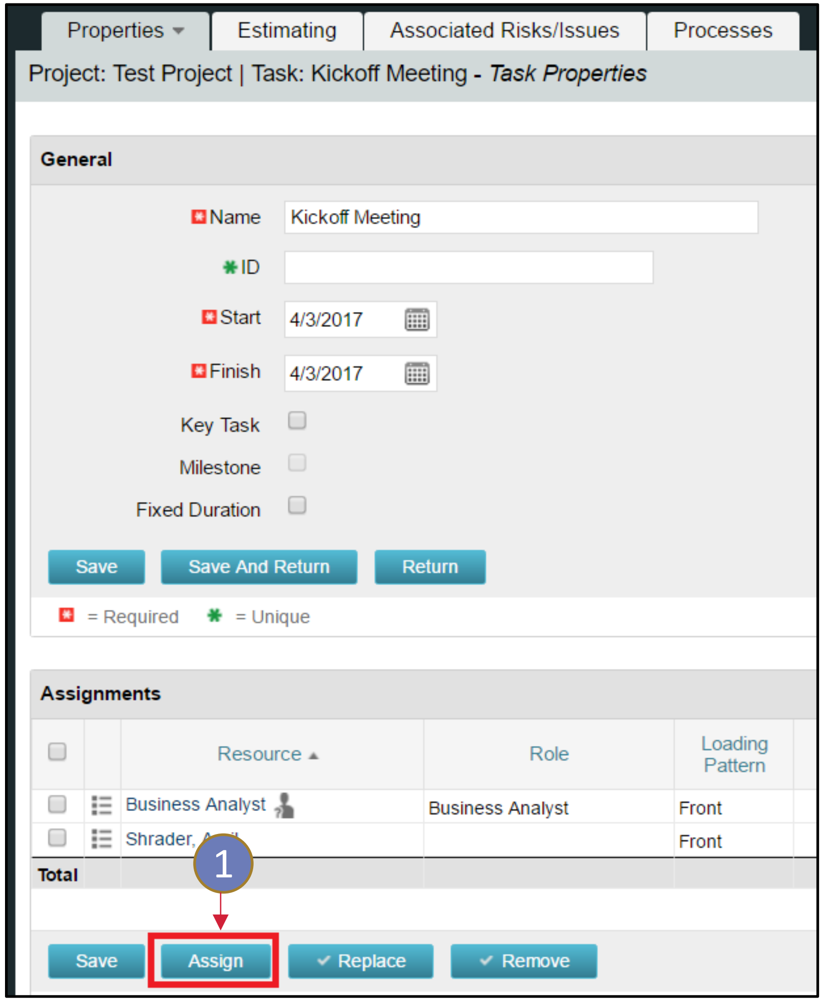
Assigning Resources and Roles to Tasks

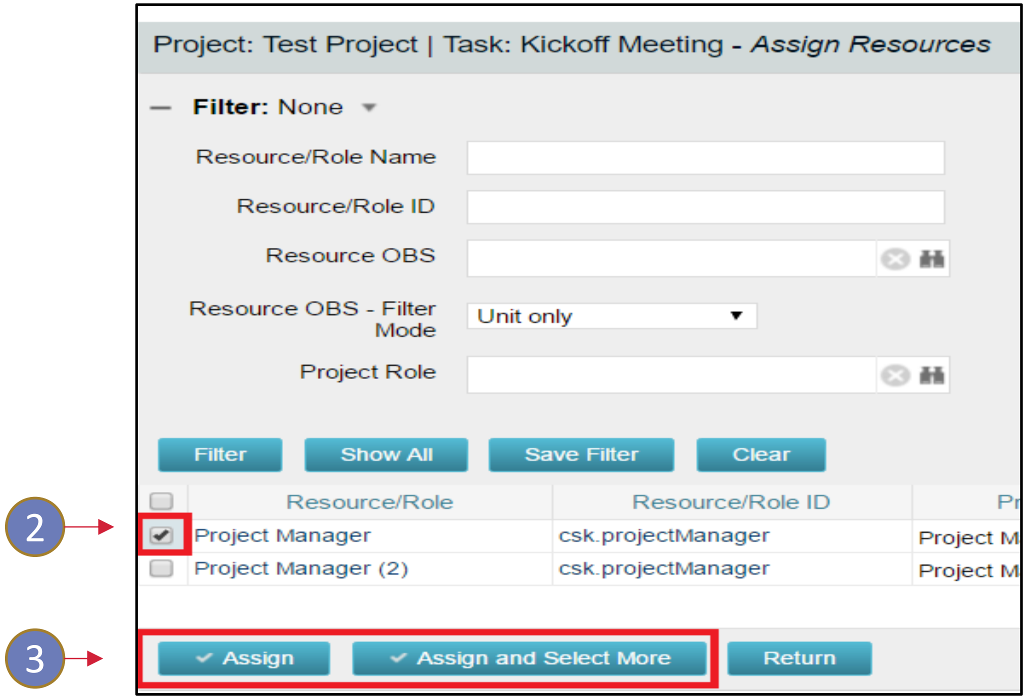
- After creating the WBS and populating the Team, assign resources to tasks
- Based on the Organizations decisions of how the "*Assignment Pool*" field is set up at project creation will impact how resource / roles can be assigned to tasks
  - **Team Only** – when selected means that all resources / 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



Create an Assignment



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*



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

Part VI: Project Sub-Objects

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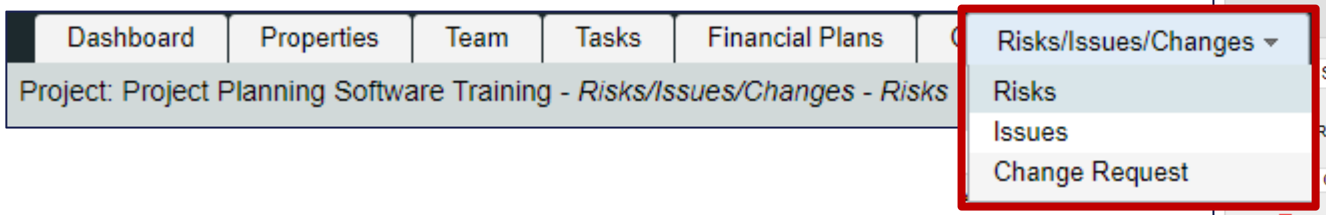
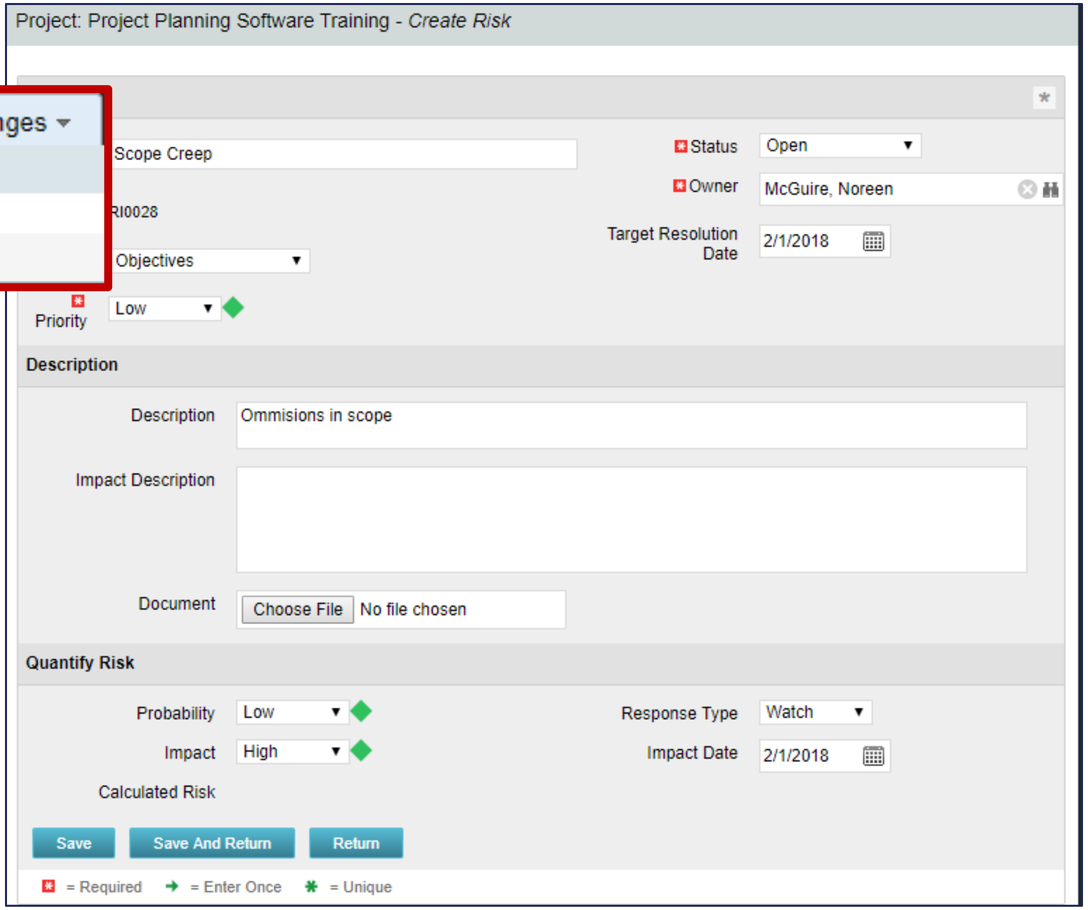
Risks and Issues

- 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

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

	Change Request	ID	Status	Owner	Priority	Review Date	Expected Close Date ▲	Closure Date	Change in Cost	Change in Schedule	Change in Resources
	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

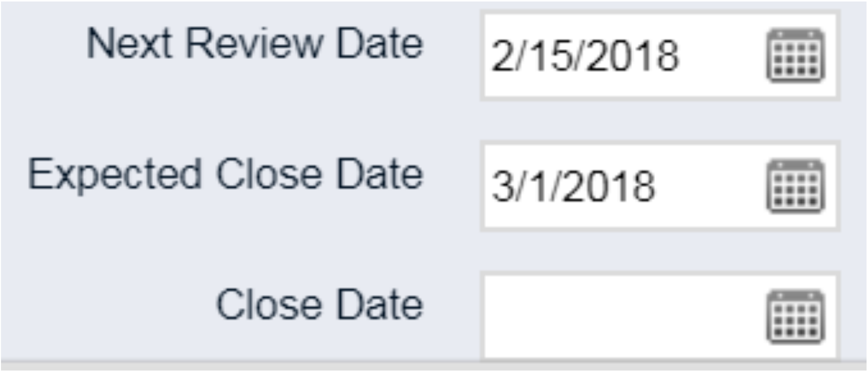
- Change in Cost
- Change in Schedule
- Change in Resources

Change Requests

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

Key fields include:

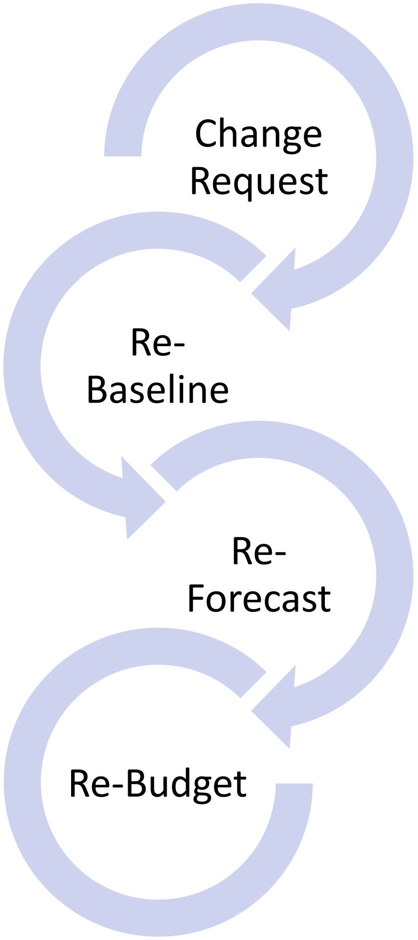
- Next Review Date
- Expected Close Date
- Close Date
- Date Assessed
- Approved Date



To manage multiple levels of review

- Assessor
- Approved By

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

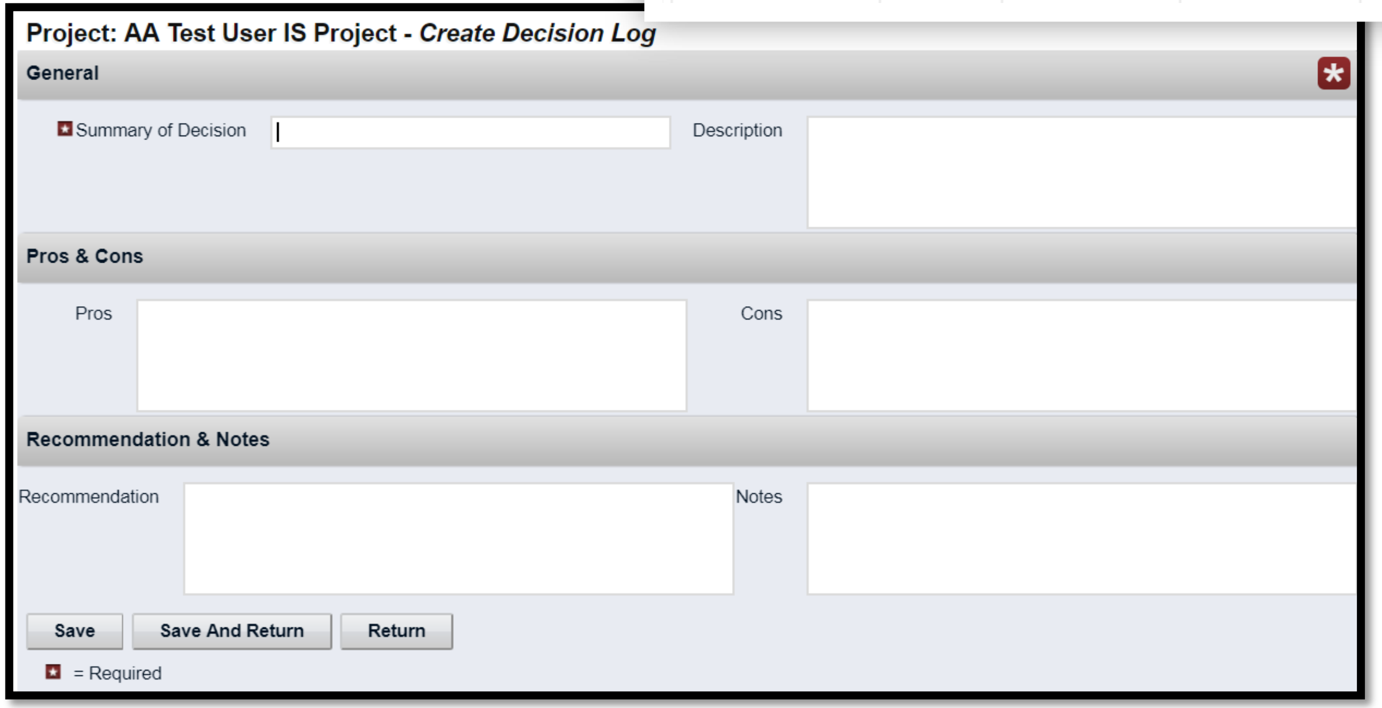
Decision Log

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.

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	

Common Elements

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



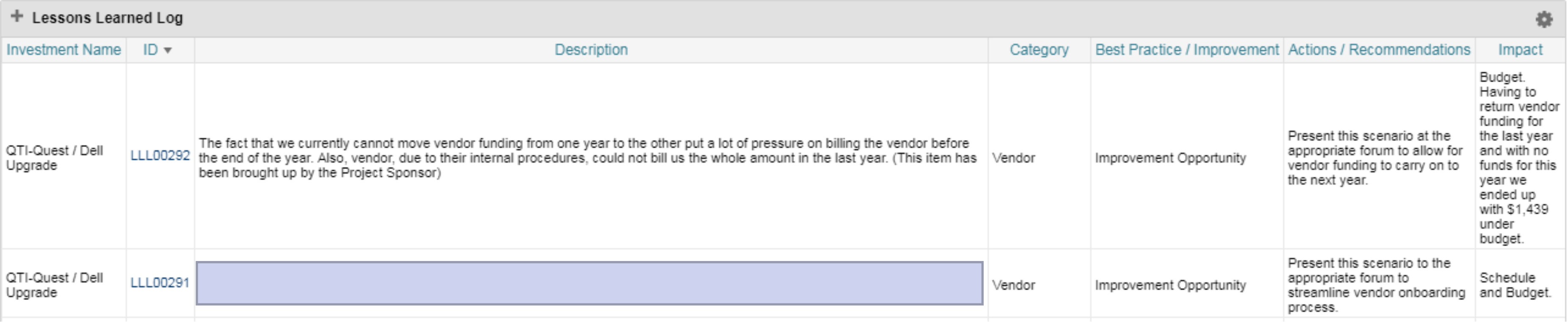
Lessons Learned

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


Lessons Learned Log

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

Dashboard - Sub-Project Action Items

Project	Subject	Created By	Assigned To	Due Date▲	Prty
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	Arya, 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	

Displaying 1 - 9 of 9

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

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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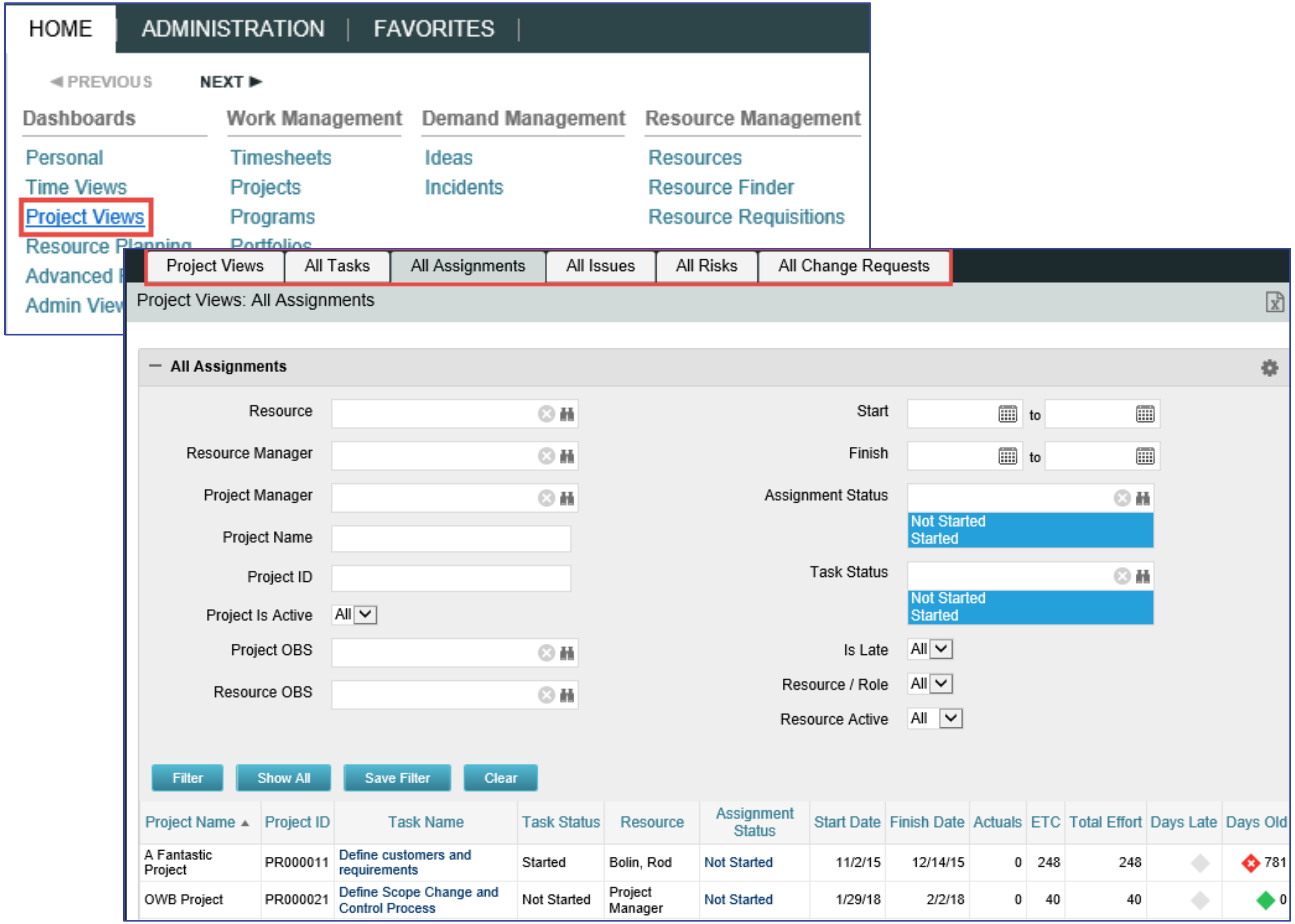
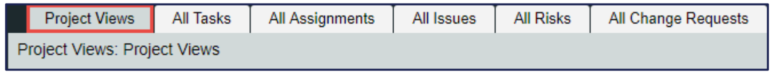
Base Configuration Portlets

- 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

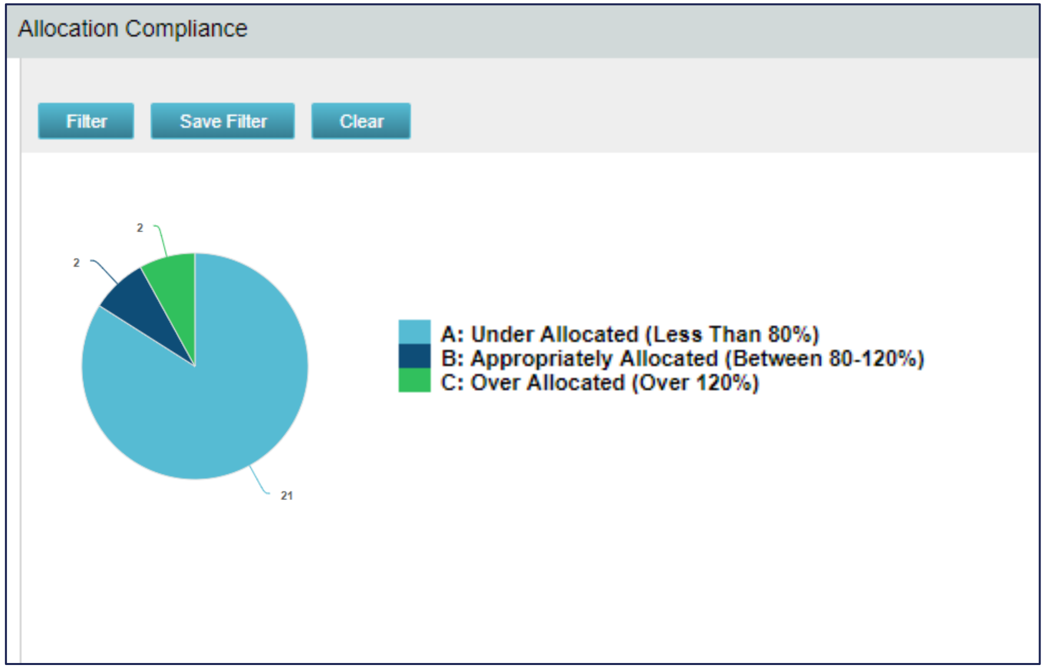


Base Configuration Portlets

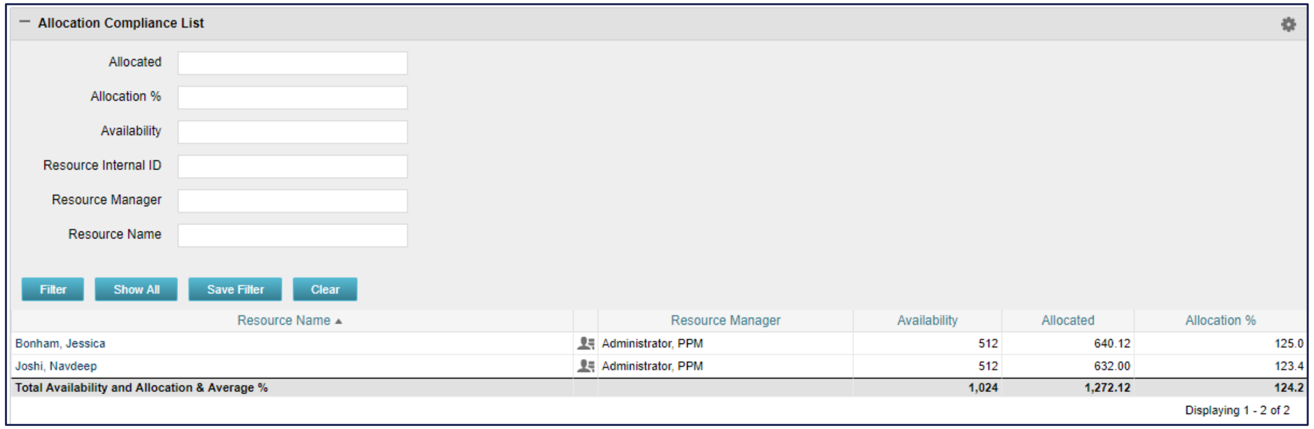
- Project Views tab



- 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

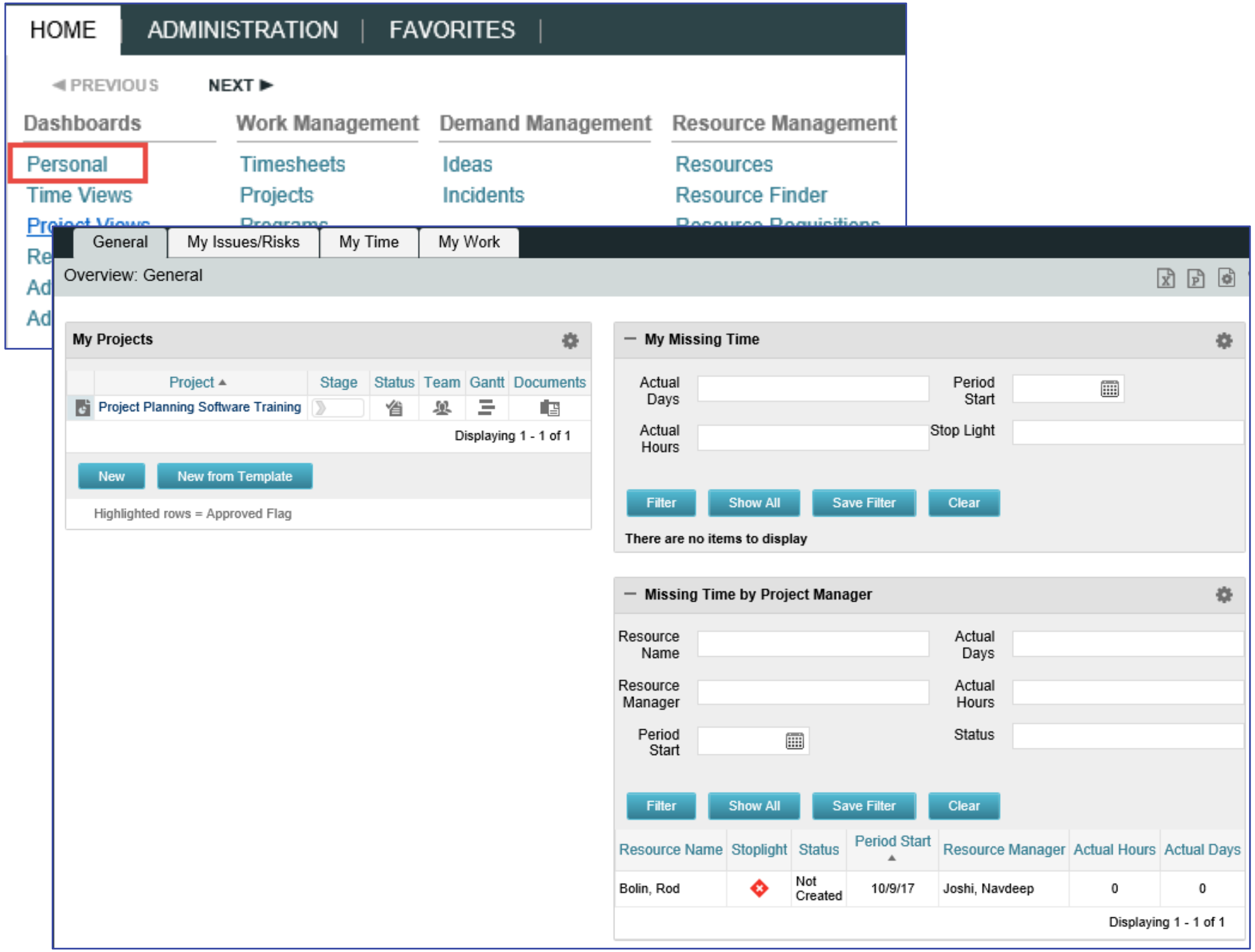


- Additional filter criteria can be used in the Allocation Compliance List



Base Configuration Portlets

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



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

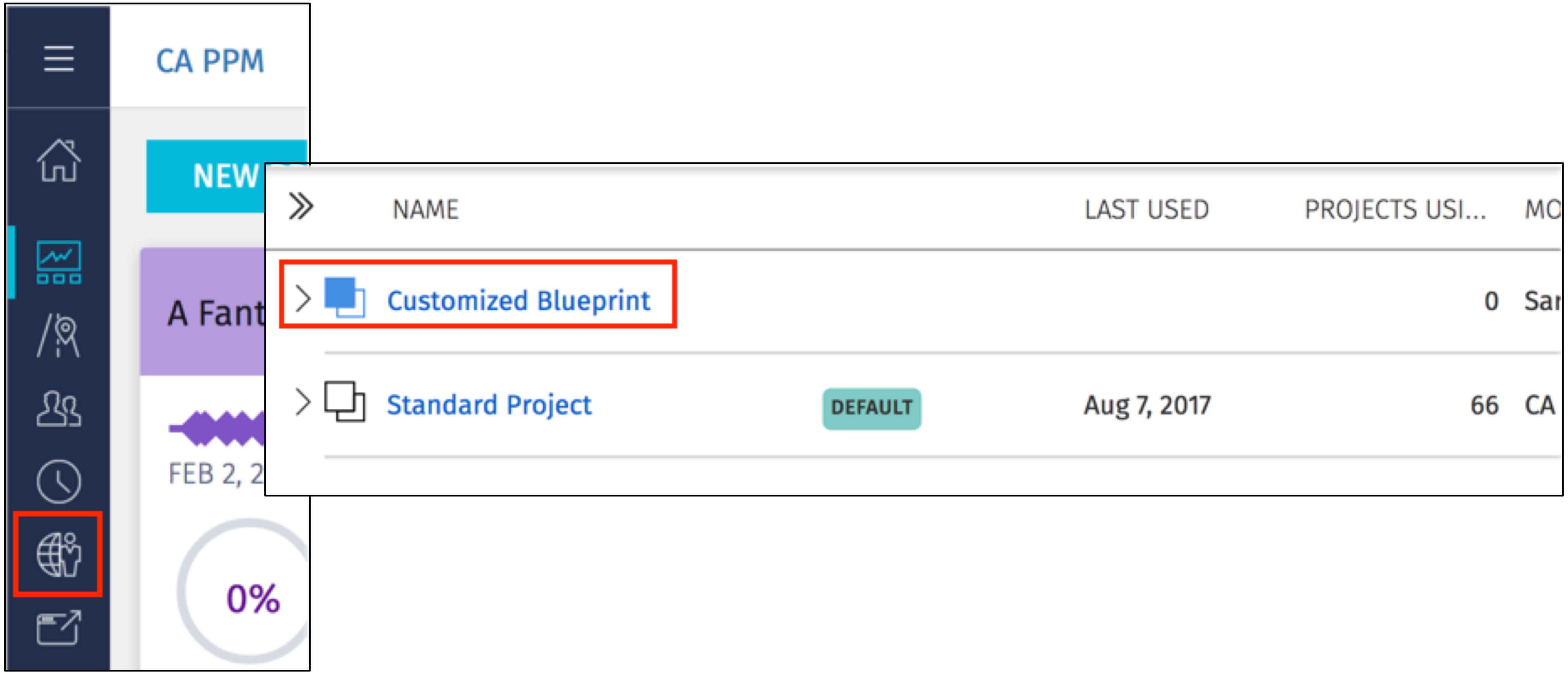
- New security rights, related to the new UX, are available in 15.4:

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)

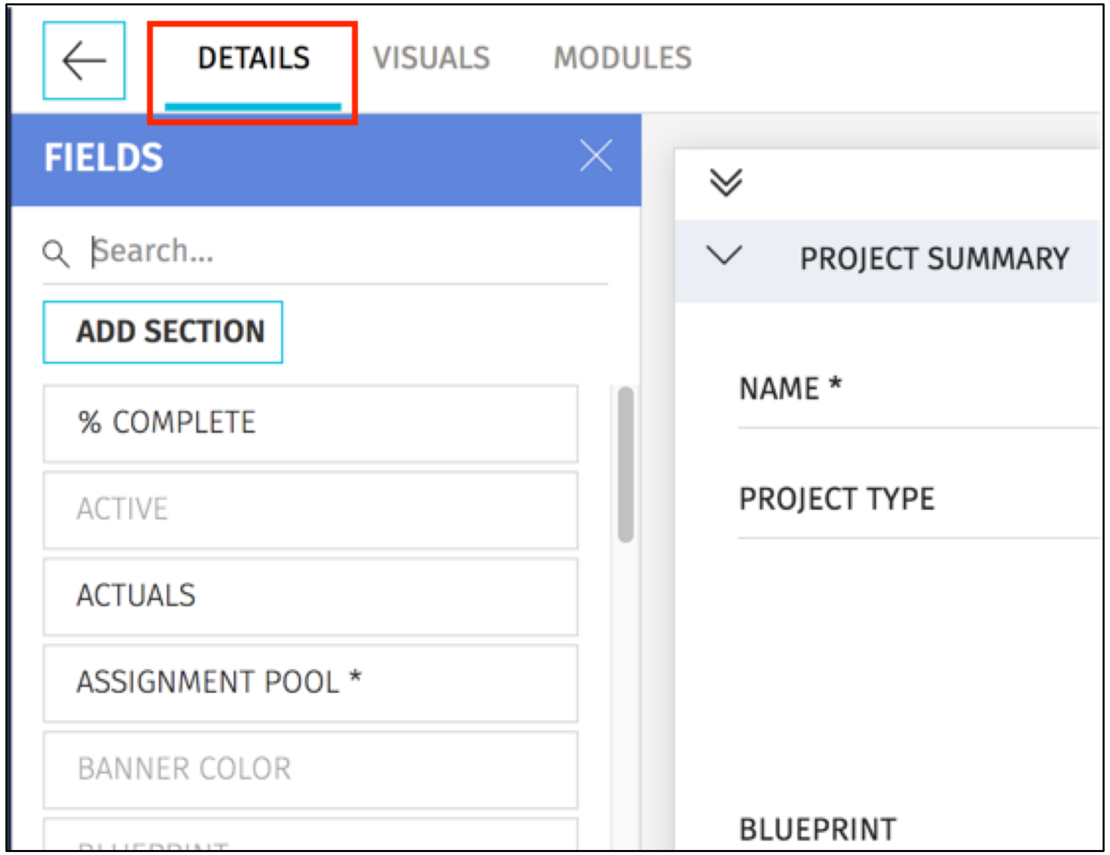
- Project configuration is available via the blueprint.



Blueprints (2)

Modify the blueprint to customize the following:

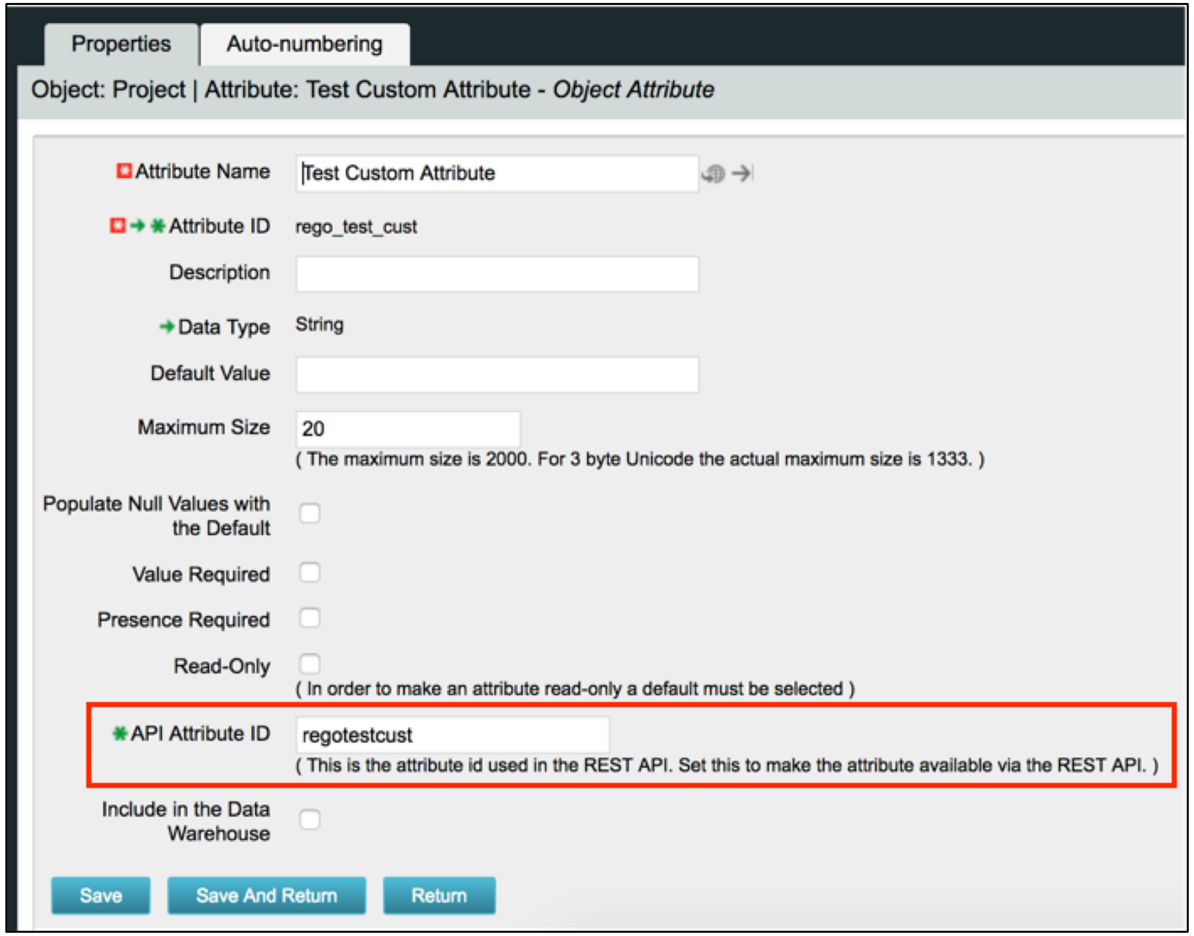
1. **<u>Details (project edit screen)</u>**:
   - No significant changes from previous version.
   - OBS may now be added to view, and edited within the project.
   - The following limitations apply:
     - No project subobjects
     - No detailed WBS (more than 2 levels)
     - Certain Investment/Project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



Blueprints (3)

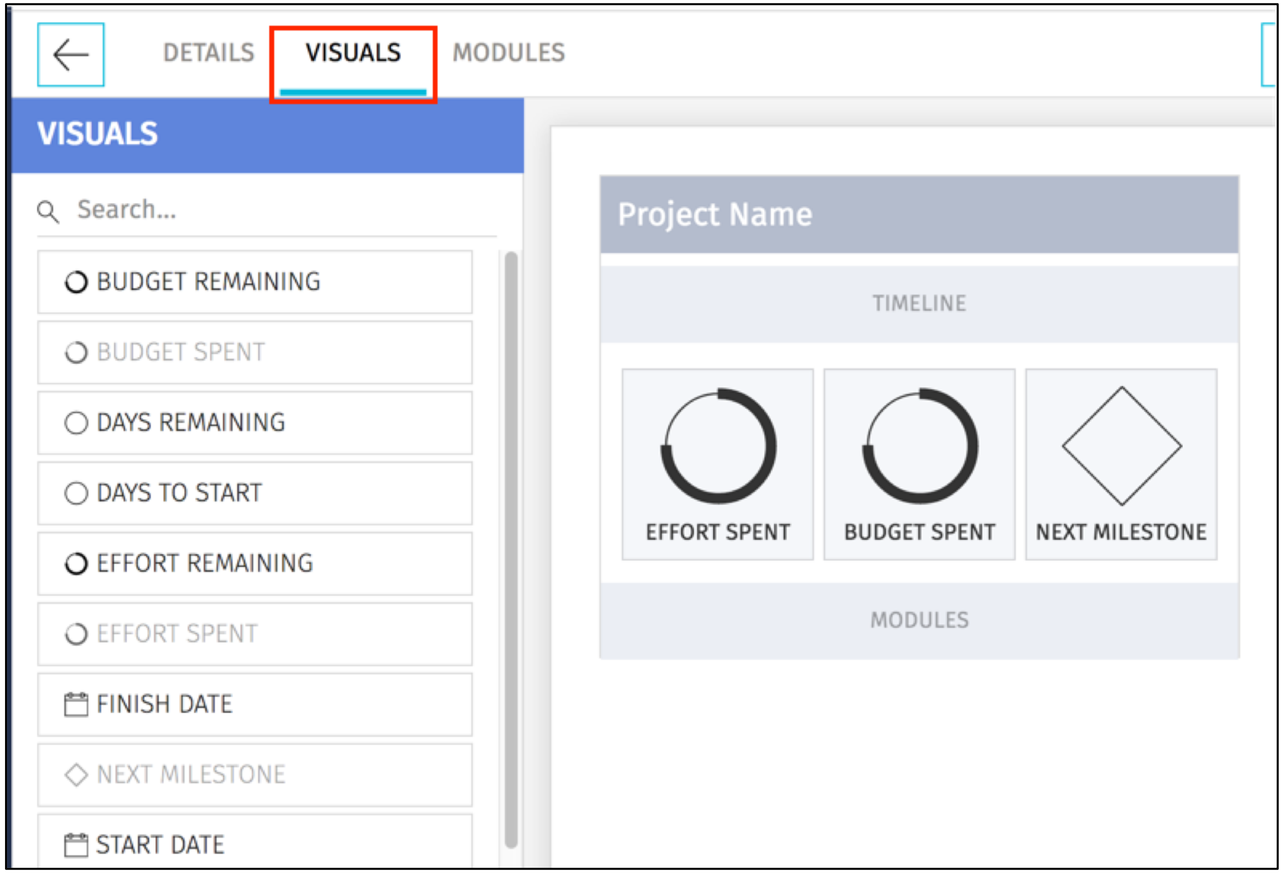
Note: In order for custom fields (or any fields) to be able to be added to the *Details* page, an **API Attribute ID** must be populated for the attribute.

- 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.



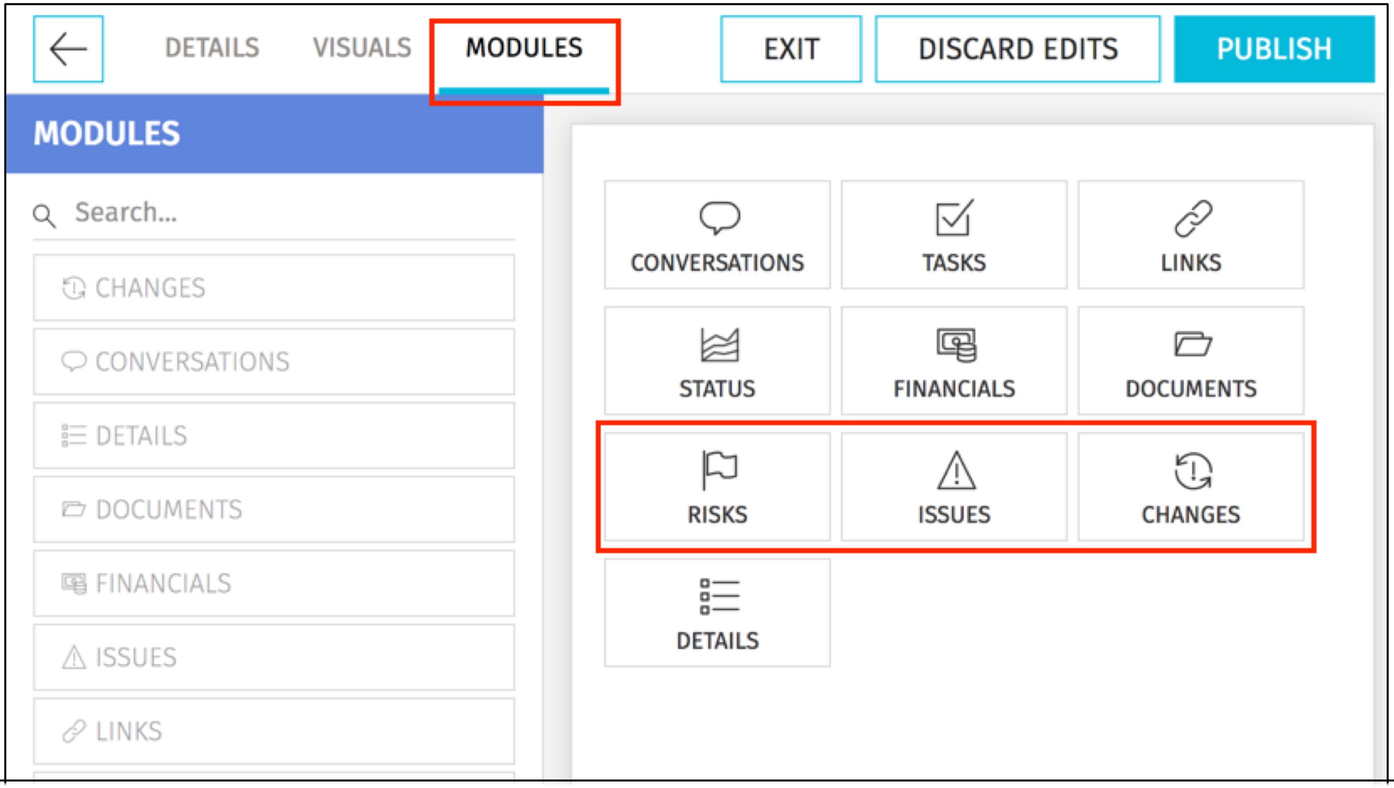
Blueprints (4)

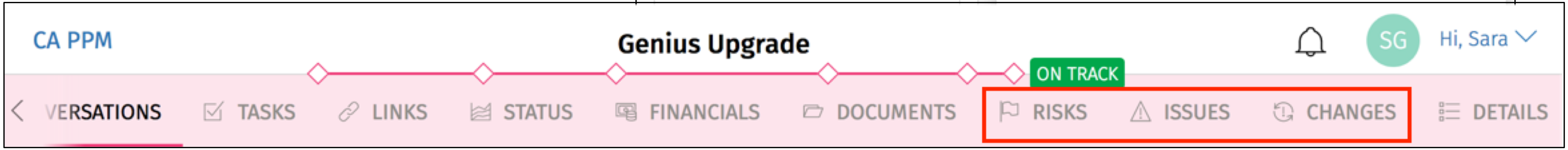
2. **Visuals**:
   - Customize the metrics to be displayed in the Project Tile on the main *Projects* page.
   - Modify via drag and drop.



Blueprints (5)

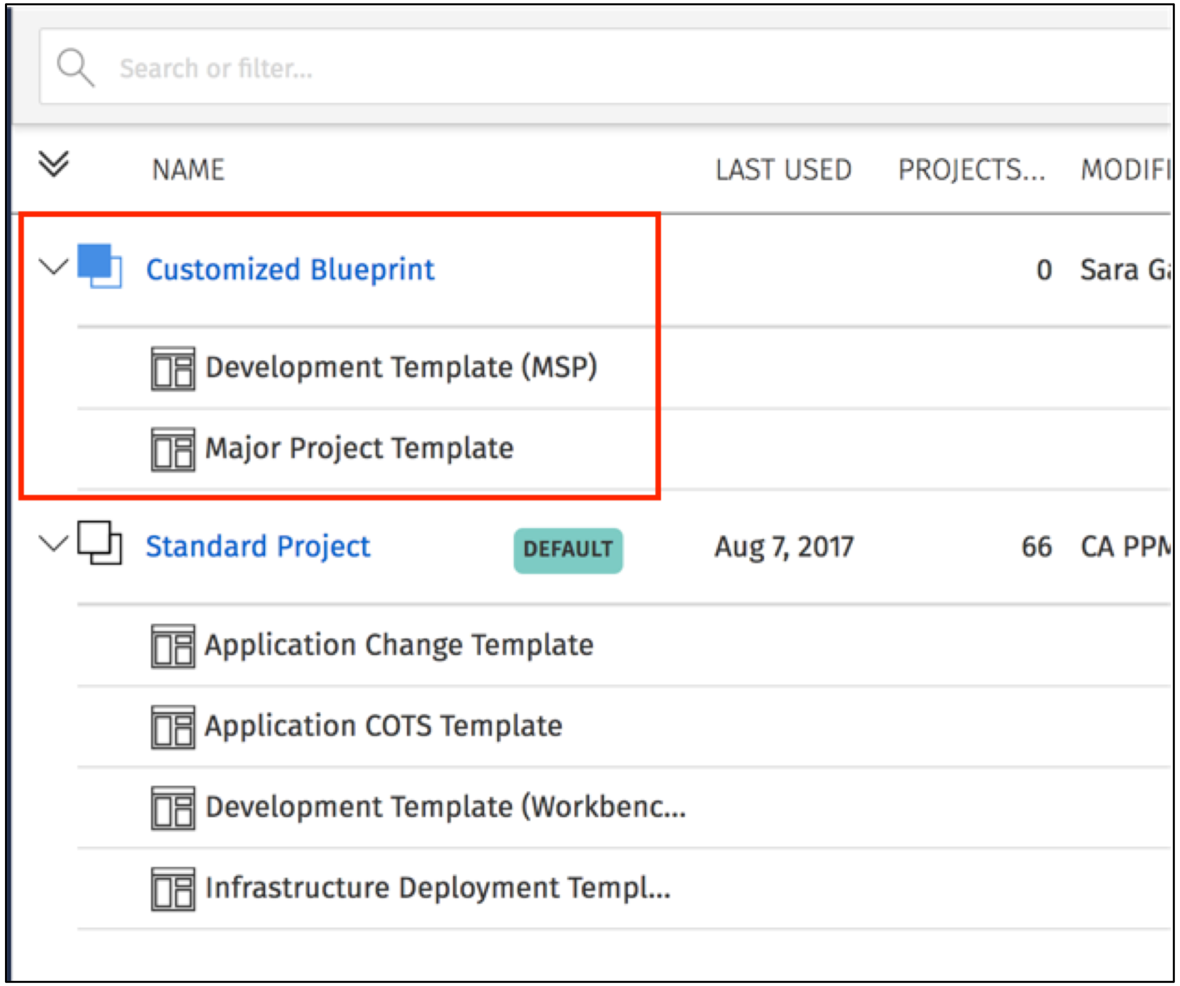
3. **<u>Modules</u>**:
   - Risks, Issues and Changes now available as modules (15.4). Can select all 3 to be included in blueprint, or include only those applicable to the project type.
   - These modules will be covered in later sections





Blueprints (6)

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



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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- 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**

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