

RM/PM/TM/BM User Interface | Tips and Tricks

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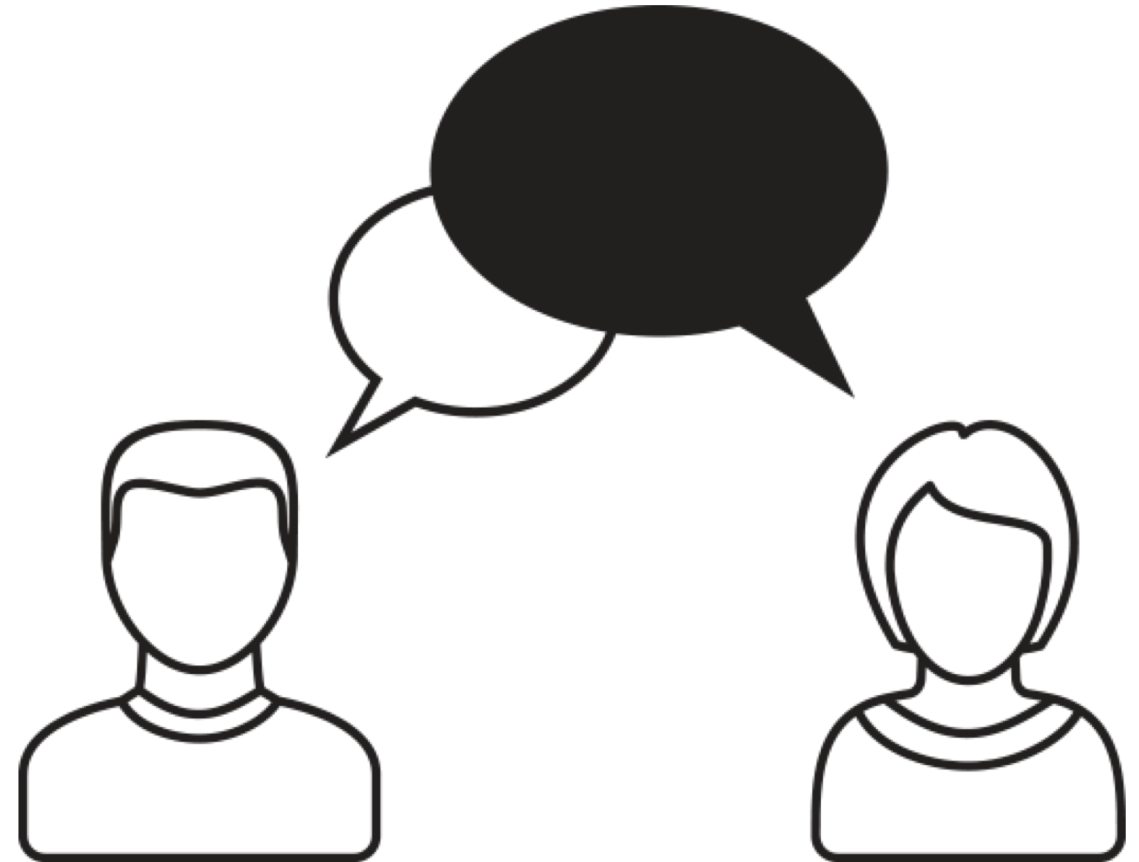
Part I: CA PPM Classic View

*rego*University 2018

Let Rego be your guide.

Introductions

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



Our Goal And Purpose

- Purpose: to make life a little easier using CA PPM in providing support for Resource and Project Managers.
- Goal: to hear you say “I didn't know you could do that!”

Agenda

- Open Mic
- PM Tips and Tricks
- RM Tips and Tricks
- Questions

Open Mic

- Do you find CA PPM difficult to use?
- What are some of your pain points?
- What do you find difficult?

Saving Favorite Links And Adding Sections

- Add your favorite links and actions. Go to Favorites menu > Configure > Add Section > Next > Fill out fields > Save and Return
- Then checkmark next to the links and click the Move button to place them under the appropriate sections

The screenshot displays the 'Favorites' configuration page in the Rego system. The 'My Links' section is active, showing a list of links: 'Projects List Page', 'Project #1 - Dept Test Pgm', 'Project #2 - Build a Software Solution', and 'PM Dashboard'. Below the list are buttons for 'Add Current', 'Configure', and 'Refresh'. A 'Move' dialog is open, showing a list of items to be moved: 'New Project', 'Create a New Resource', and 'Run Capacity Report'. The 'Move' button is highlighted. To the right, a 'Menu Item' selection dialog is shown with radio buttons for 'My Links', 'Resource Links', 'Portlets', and 'Actions'. The 'Save And Return' button is highlighted.

Section	Items
My Links	Projects List Page, Project #1 - Dept Test Pgm, Project #2 - Build a Software Solution, PM Dashboard
Resource Links	Resource List, My Resource Calendar
Portlets	Resource Workloads Portlet, Weekly Details Portlet, Capacity Planning Portlet
Actions	New Project, Create a New Resource, Run Capacity Report

Buttons: Add Current, Configure, Refresh

Move Dialog:

Item	Selected
Actions	<input type="checkbox"/>
New Project	<input checked="" type="checkbox"/>
Create a New Resource	<input checked="" type="checkbox"/>
Run Capacity Report	<input type="checkbox"/>

Buttons: Move, Reorder, Add

Menu Item Selection:

Menu Item	Selected
My Links	<input checked="" type="radio"/>
Resource Links	<input type="radio"/>
Portlets	<input type="radio"/>
Actions	<input type="radio"/>

Buttons: Save And Return, Return

What Do The Asterisks Mean?

Red = a required field exists and is empty

Gray = a required field exists and is filled





None = no required field exists



The image shows three overlapping windows from the Rego software interface, illustrating the meaning of asterisks in different colors:


- Project Template: SDLC Template - Create Project**: The "General" tab header has a red asterisk icon, indicating a required field exists and is empty.
- Project: A Test Project - Properties**: The "General" tab header has a gray asterisk icon, indicating a required field exists and is filled.
- Copy Template Project Options**: The header has no asterisk, indicating no required field exists. The form contains:
 - Template Name: SDLC Template
 - Scale Work By: 0%
 - Scale Budget By: 0%
 - Convert resources to roles: ☒
 - Legend: = Required = Unique


Collapse And Expand Sections



Click the section bars to collapse/expand that section



Project: A Test Project - Properties  Open in Scheduler  Scenario: [--Select--]  Actions 



General  



Stakeholders 



Organizational Breakdown Structures 



Department OBS  



Geographic location  

Organization1  

Portfolio OBS  

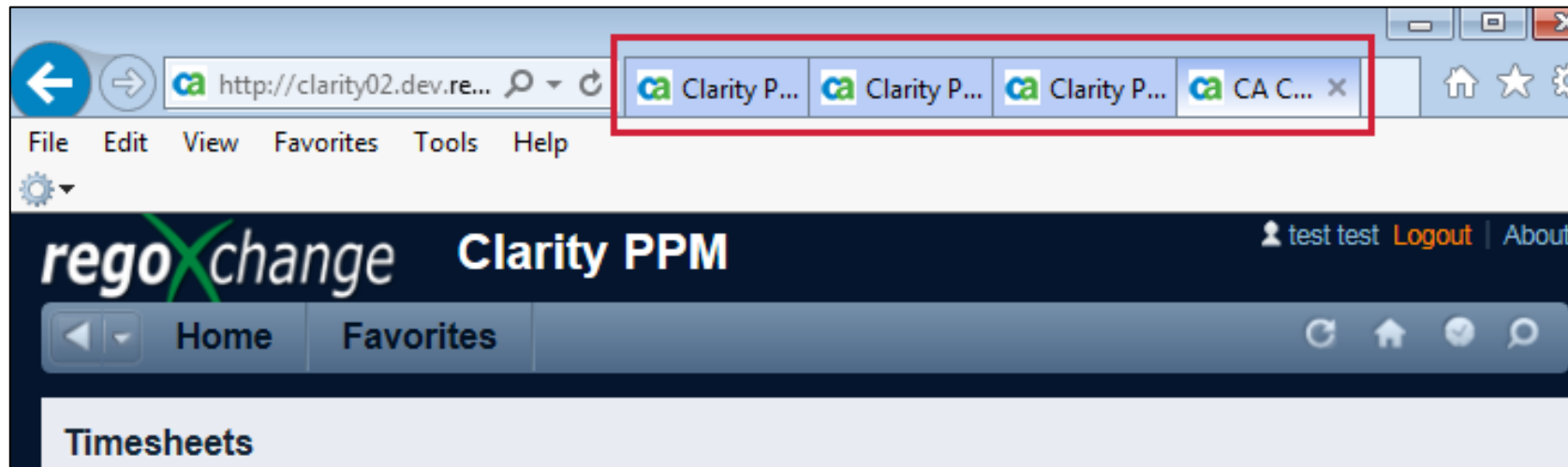
TEP Customer Type  

TEP AREA  

 = Required  = Unique

Open Multiple Tabs In CA PPM To Save Time

- Did you know you can have multiple tabs open in CA PPM?
- Save navigation time by jumping back and forth between tabs
- Right-click on a link and:
 - In IE click **Open in new tab**
 - In Firefox/Chrome click **Open link in new tab**



Save Time By Saving A Filter

- Save a “My Team” or “My Projects” filter and make it your Default filter. Save Portlet filters too!
- Go to the Portlet/Page > Enter filter criteria > Filter > Save Filter > Enter a Name > Check Default > Save and Return

Content: Resources - Save Filter

☒ *Filter Name

Default ☒

☒ = Required * = Unique

Resource List

☒ Filter: My Team ▼

Resource/Role Name

Content: Projects - Save Filter

☒ *Filter Name

Default ☒

☒ = Required * = Unique

Projects

☒ Filter: My Projects ▼

Project Name

Populate Timesheets Quickly

- Quickly fill a timesheet by clicking the Populate button.
- Click **Configure** to select Populate options, then **Populate**.
- In 14.4, “Copy time entries from previous timesheet” has been adjusted to ONLY pull tasks from the previous timesheet (no longer includes tasks that you have ETC on).

Investment	Description	Investment ID	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16	Fri 7/17	Sat 7/18	Total	ETC	Posted Actuals	Input Type Code
	Total		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			

Time Entry Options

Populate assigned tasks ☒

Copy time entries from previous timesheet ☐

☐
(Include actuals from previous timesheet (except for incidents))

Display Unit

Decimal Places

Turn User Notifications On/Off

- Alerts, Email and Text Messages (SMS) are available
- Go to Home > Personal > Account Settings > Notifications
- Enter a SMS address on the Personal Information tab

Account Settings: Notifications

Functional Area	<input type="checkbox"/> Alert	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Action Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discussions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Escalations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Incidents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Issues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports and Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisitions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Risks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Timesheets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Reset Save

Personal Information Proxy Notifications Soft

Account Settings: Personal Information

General Information

User Name test

Last Name test

First Name test

Email Address test@example.com

SMS Address 7738727676@tmomail.net

Work Phone

1. T-Mobile: @tmomail.net
2. AT&T: @txt.att.net
3. Sprint: @messaging.sprintpcs.com
4. Verizon: @vtext.com

Copy And Paste In Time-Scale Grid Views

Need to fill the same value in multiple cells?

1. Click in cell (edit mode), hit the enter key (display mode)
2. Shift + Arrow keys to highlight additional cells
3. Ctrl + C (dashes appear)
4. Click in the destination cell to paste, hit the enter key
5. Ctrl + V (paste values in)
6. Save your changes

	, 2015	Jan 1, 2016-Jan 31, 2016	Feb 1,
Cost		5,000	
Actual Cost		0	
Cost Variance		5,000	
Cost	5,060	220	
Actual Cost	0	0	
Cost Variance	5,060	220	
Cost	5,060	220	
Actual Cost	0	0	
Cost Variance	5,060	220	
Cost	0	0	
Actual Cost	0	0	

	Oct 1, 2015-Oct 31, 2015	Nov 1, 2015
Cost	0	
Actual Cost	0	
Cost Variance	0	
Cost	0	
Actual Cost	0	
Cost Variance	0	
Cost	0	
Actual Cost	0	
Cost Variance	0	
Cost	4,400	
Actual Cost	(4,400)	

	Oct 1, 2015-Oct 31, 2015	Nov 1, 2015
Cost	5,000	
Actual Cost	0	
Cost Variance	0	
Cost	220	
Actual Cost	0	
Cost Variance	0	
Cost	220	
Actual Cost	0	
Cost Variance	0	
Cost	4,400	
Actual Cost	(4,400)	

Copy And Paste Entire Row, Column Or Table

- Select an entire row
 - Press Shift + Ctrl + Right Arrow to select the entire row
- Select an entire column
 - Press Shift + Ctrl + Down Arrow to select the entire column
- Select entire grid
 - Use both steps above to select all cells in the grid
- To delete multiple values, select one or more cells and press the Delete key

	Amounts By Period										
	Oct 1, 2015-Oct 31, 2015	Nov 1, 2015-Nov 30, 2015	Dec 1, 2015-Dec 31, 2015	Jan 1, 2016-Jan 31, 2016	Feb 1, 2016-Feb 29, 2016	Mar 1, 2016-Mar 31, 2016	Apr 1, 2016-Apr 30, 2016	May 1, 2016-May 31, 2016	Jun 1, 2016-Jun 30, 2016	Jul 1, 2016-Jul 31, 2016	
Cost	0	0	0	5,000	0	0	0	0	0	0	0
Actual Cost	0	0	0	0	0	0	0	0	0	0	0
Cost Variance	0	0	0	5,000	0	0	0	0	0	0	0
Cost	0	0	5,060	220	1,000	0	0	0	0	0	0
Actual Cost	0	0	0	0	0	0	0	0	0	0	0
Cost Variance	0	0	5,060	220	1,000	0	0	0	0	0	0
Cost	0	0	5,060	220	825	0	0	0	0	0	0
Actual Cost	0	0	0	0	0	0	0	0	0	0	0
Cost Variance	0	0	5,060	220	825	0	0	0	0	0	0
Cost	4,400	0	0	0	0	0	0	0	0	0	0
Actual Cost	(4,400)	0	0	0	0	0	0	0	0	0	0
Cost Variance											

Update Allocation Hours On Team Detail Page

- Go to Project > Team > Detail page
- Enter allocations in hours by week, month or year
- CA PPM converts hours into a %-based allocation segment

Properties **Team** Tasks Financial Plans Risks/Issues/Decision Log Chargebacks Hierarchy Processes Audit Trail Dashboard PM Views

Project: A Test Project - **Team - Detail** Scenario: [-Select-] Actions

Filter: System Default

										Allocation By Period											
	Resource/Role	Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC		Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16	Nov 16	Dec 16
<input type="checkbox"/>	Benson, Bradley	Business Analyst	Soft	10/19/15	12/31/16	504.00	0.00	0.00		42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00
<input type="checkbox"/>	Bishop, Mike	Project Manager	Soft	10/19/15	12/31/16	2,353.50	0.00	0.00		168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00
<input type="checkbox"/>	Chouhan, Vipin	Allocation					0.00	0.00		60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00
<input type="checkbox"/>	Scarlato, Jennifer						0.00	0.00		50	84.00	50	84.00	50	84.00	50	84.00	50	22.00	50	22.00
Total										0.00	0.00	354.00	354.00	354.00	354.00	354.00	354.00	292.00	292.00	292.00	292.00

Displaying 1 - 4 of 4

Allocation

	Start	Finish	% Allocation
<input type="checkbox"/>	12/1/2015	12/31/2015	50.00%
<input type="checkbox"/>	1/1/2016	2/29/2016	29.76%
<input type="checkbox"/>	3/1/2016	3/31/2016	27.17%
<input type="checkbox"/>	4/1/2016	4/30/2016	29.76%
<input type="checkbox"/>	5/1/2016	6/30/2016	28.41%
<input type="checkbox"/>	7/1/2016	7/31/2016	29.76%
<input type="checkbox"/>	8/1/2016	8/31/2016	27.17%
<input type="checkbox"/>	9/1/2016	9/30/2016	28.41%
<input type="checkbox"/>	10/1/2016	10/31/2016	29.76%
<input type="checkbox"/>	11/1/2016	12/31/2016	28.41%

Save Add Add/Up

Team-Detail Page View Configuration

- Adding Availability, Actuals and ETC give the RM/PM a clear view for comparisons on the project
- Aggregate Allocation shows all allocations for the resource

Value Attributes

Available







Aggregate Allocation (Compare To)
Aggregate Hard Allocation
Aggregate Hard Allocation (Compare To)
Allocation (Compare To)

Selected

Allocation
Aggregate Allocation
Resource Availability
Actuals

Show Legend Column

☒

				Allocation By Period												
	Resource/Role	Project Role	Booking Status		Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16	Nov 16	Dec 16
<input type="checkbox"/>	  Benson, Bradley	 Business Analyst	Soft	Allocation	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00
				Aggregate Allocation	1,251.60	1,361.58	1,487.26	1,236.34	957.20	957.20	915.60	998.80	957.20	915.60	957.20	861.20
				Resource Availability	168.00	168.00	184.00	168.00	176.00	176.00	168.00	184.00	176.00	168.00	176.00	176.00
				Actuals												
				ETC		28.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00
<input type="checkbox"/>	  Bishop, Mike	 Project Manager	Soft	Allocation	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00
				Aggregate Allocation	420.00	420.00	444.00	348.00	256.00	256.00	252.00	260.00	256.00	252.00	256.00	256.00
				Resource Availability	168.00	168.00	184.00	168.00	176.00	176.00	168.00	184.00	176.00	168.00	176.00	176.00
				Actuals												
				ETC		112.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00

Highlight Rows And Expanding/Collapsing Filters

- Remove/Change Highlight Row
 - Your Portlet > Options > Configure > List Column Section > Options > Highlight Row by Attribute

<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0162	test	Another Task Dep Test Pgm	Administrator, Niku		12/29/14	12/31/15		0.00	0.00	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0145	asdfad fasd		Meyers, Michael		10/27/14	3/31/15		0.00	0.00	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0001	Bat Cave Re- Design		Sam, Uncle		8/27/12	7/8/15	865,000.00	277.00	10,569.05	10,846.05	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0026	Batman Program		West, Wally		1/1/12	4/20/20		0.00	0.00	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0269	BEL - Time Smoothing		Lofton, Brian		11/2/15	2/26/16		0.00	540.00	540.00	

Highlight Row by Attribute

Approved Flag
(A row will be highlighted when this attribute is not zero)


- Portlet filter section can be defaulted to be expanded or collapsed
 - Your Portlet > Options > Configure > List Filter Section > Layout > Settings section > Default Filter State

Default Filter State

☐ Collapsed



☒ Expanded

Add a Link to a List View

- Your Portlet > Options > Configure > List Column Section > Fields > Select the Attribute Properties()
- You may add a link to any page you have view access. Also, some out of the box pages (Documents, Discussions, Subprojects, Status Reports, Gantt, etc)

Portlet: Project List - List Column Field

General

Attribute	Name
Data Type	String
<input checked="" type="checkbox"/> Column Label	Project 
Show Column Label	<input checked="" type="checkbox"/>
Display Type	Text
Secondary Value	[--Select--]
Alignment	Left 
Column Width	20 %
Width	<input type="text"/> (Number of columns)
Height	<input type="text"/> (Number of rows)
Allow Word Wrapping in Column Header	<input checked="" type="checkbox"/>
Allow Word Wrapping in Column	<input type="checkbox"/>
Link	<div> <div>[--Select--]</div> <div> Project Properties Project Overview <input checked="" type="checkbox"/> Project Default Link to the Idea Property Page Link to the documents page Link to the discussions page Link to the subprojects page Link to Project Staff Details Link to the Gantt page Charge Codes Generate Status Report PMO Accelerator Project Dashboard Link Project Business Alignment Link Program Properties SubPage Risk link Program Properties SubPage Schedule link PMO Accelerator Project Dashboard Link Status Reports Project Business Alignment Link Project Properties SubPage Program Management Plan link Program Properties SubPage Program Management Plan link Project Properties SubPage Project Status Report List link Program Properties SubPage Program Status Report List link Project Properties SubPage Quality Attributes link </div> </div>
Disable Link Attribute	<input type="checkbox"/>
Allow Editing	<input type="checkbox"/>

Save Save And F

☒ = Required

4/25/16 6/30/17

New from Template

Add a New Image and Link to a List View

- Your Portlet > Options > Configure > List Column Section > Fields > New
- Select Image and then select and image and the desired link.
- In this example, we've created a new link to the Status Reports of the project from the list view.

Create Virtual List Column

Display Type ☐ Gantt ☒ Image ☐ Progress Bar

Portlet: Status Reports - List Column Field

General

☒ Column Label

Show Column Label ☐






Allow Word Wrapping in Column Header ☐

Image

Link

Open as Pop-up ☐

Next

<input type="checkbox"/>	Project	Investment ID	Start	Finish	Actuals	
<input type="checkbox"/>	FRONT OFFICE	CAT-1307	1/1/16	1/1/21	10,502	
<input type="checkbox"/>	INFRASTRUCTURE	CAT-1309	1/1/14	9/30/21	37,743	
<input type="checkbox"/>	UltraPIPE 10.7 Update	PRJ-2322	12/19/16	3/3/17	0	
<input type="checkbox"/>	Business Analysis Tools	CAT-1224	1/1/10	12/31/17	2	
<input type="checkbox"/>	CAPABILITIES	CAT-1308	1/1/16	3/31/21	2,842	

Add A Totals Row On Portlets

- Add a “Totals” row to the bottom of almost any portlet to calculate Sum, Average, Count, Min, Max, Std Dev., and Variance

			Resource/Role▲		Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC
<input type="checkbox"/>		Q	Benson, Bradley	=	Business Analyst	Soft	10/19/15	12/31/16	504.00	0.00	448.00
<input type="checkbox"/>		Q	Bishop, Mike	=	Project Manager	Soft	10/19/15	12/31/16	2,353.50	0.00	1,792.00
<input type="checkbox"/>		Q	Chouhan, Vipin	=	Developer	Soft	10/19/15	12/31/16	1,152.00	0.00	640.00
<input type="checkbox"/>		Q	Scarlato, Jennifer	=	Architect	Soft	12/1/15	12/31/16	692.00	40.00	533.33
Totals							10/19/15	12/31/16	4,701.50	40.00	3,413.33

Set Sub Projects To Read-Only

- Open Programs or Master projects in MSP or OWB without locking the sub-projects below it
- Go to Project > Properties > Subprojects > Set Read-Only
- This will allow PMs to edit the WBS on the Program/Master project level without locking the children

The screenshot displays the 'Project - Properties - Subprojects' dialog box in Microsoft Project. The 'Subprojects' tab is selected in the left-hand menu. The 'Active' checkbox is checked, and the 'Set Read-Only' button is highlighted with a red box. The table below shows a single project, 'Test Project', with a 'Read Only' status of 'No'.

Project	ID	Count	Actuals	ETC	Total Effort	Percent Expended	Baseline	Status	Schedule	Read Only
Test Project	PR000271	0	0	5,013	5,013	0.00%	0	Green Diamond		No
Total		1	0	5,013	5,013	0.00%	0	Green Diamond		No

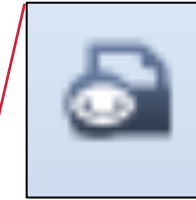
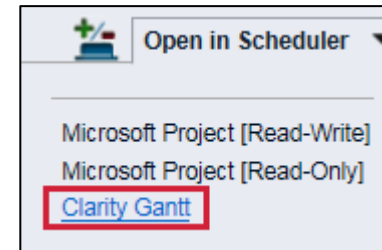
Displaying 1 - 1 of 1

Buttons: Add, Remove, Set Read-Only, Set Read/Write

Legend: = Program, Work Effort = Hours

Print From The CA PPM (Clarity) Gantt View

- Open up the Clarity Gantt
- Add preferred column in your view
- Click the **Printable View** icon



Project: SDLC Template - Gantt

Filter: System Default

Task	Start	Baselin...	Finish	Baseli...	Duration	% Co...	Assigned Resources	OTE
Initiation Phase	4/1/14		4/1/14			1 0.00%		✓
Initiating Process Complete	4/1/14		4/1/14			0 0.00%		✓
Planning Phase	4/1/14		4/28/14		20	0.00%		✓
Define Scope Change and Contr	4/1/14		4/7/14		5	0.00%	Project Manager	✓
Define Resource Plan	4/8/14		4/21/14		10	0.00%	Project Manager	✓
Risk Response and Mitigation Pl	4/8/14		4/21/14		10	0.00%	Architect;Business Analyst	✓
Identify Infrastructure Requirem	4/22/14		4/28/14		5	0.00%	Network Engineer;Storage...	✓
Complete Project Plan	4/22/14		4/28/14		5	0.00%	Architect;Business Analys...	✓
Planning Phase Gate Complete	4/28/14		4/28/14		0	0.00%		✓
Design Phase	4/29/14		5/19/14		15	0.00%		✓
Requirements Definition	4/29/14		5/5/14		5	0.00%	Architect;Business Analys...	✓
Functional and Technical Desigr	5/6/14		5/19/14		10	0.00%	Developer;Storage Architect	✓
Design Phase Gate Complete	5/19/14		5/19/14		0	0.00%		✓
Construction Phase	5/20/14		6/23/14		25	0.00%		✓
Database Development	5/20/14		5/26/14		5	0.00%	Developer	✓

Assign A Resource To Multiple Tasks At Once

- Go to Clarity Gantt > check the tasks > click the **Assign Resources** icon > select the resource(s) you want to assign

Project: A Test Project - Gantt

Filter: System Default

Task

Task	Start	B...	Fin
Initiation	2/10/16		12
<input checked="" type="checkbox"/> Test Task 1	2/18/16		2
<input checked="" type="checkbox"/> Test Task 2	2/18/16		2
Child 2	2/10/16		12
Grandchild 1	2/10/16		12
test	2/10/16		12
Test Project	12/10/15		2
Initiation Phase	12/10/15		12
Planning Phase	12/10/15		12
Define Scope Change and C	12/10/15		12
Define Resource Plan	12/17/15		12

Project: A Test Project - Assign Resources

Tasks

Test Task 1
Test Task 2

Filter: System Default

Resource/Role Name

Resource/Role ID

Resource OBS

Resource OBS - Filter Mode

Project Role

Filter Show All Save Filter Clear

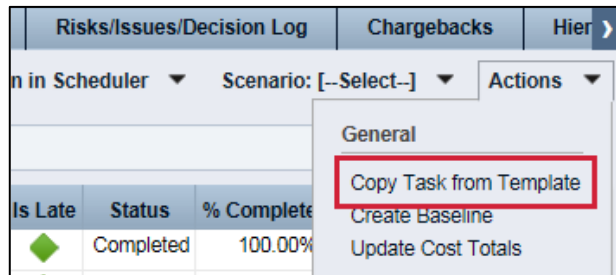
	Resource/Role	Resource/Role ID	Project Role
<input checked="" type="checkbox"/>	Benson, Bradley	bbenson	Business Analyst
<input checked="" type="checkbox"/>	Bishop, Mike	bishopm	Project Manager
<input checked="" type="checkbox"/>	Chouhan, Vipin	vchouhan	Developer
<input checked="" type="checkbox"/>	Scarlato, Jennifer	jscarlato	Architect

Assign Assign and Select More Return

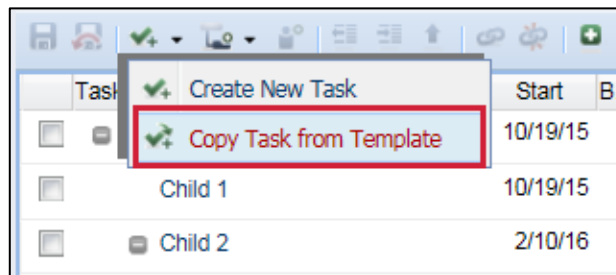
Copy Tasks From A Template Or Another Project

- Easily copy tasks from a Template or even another project. Go to Project > Tasks tab > Actions Menu > Copy Task from Template > Adjust Template filter accordingly

Tasks Tab



Clarity



Project: A Test Project - Select Project Template

Filter: System Default

Project Name: Manager:

Project ID:

OBS Unit:

Active: Yes

Template: All

OBS Unit - Filter Mode: Unit only

Power Filter: [Build Power Filter]

Filter Show All Save Filter Clear

Project	ID	Template	Active
<input type="radio"/> Application Change Template	csk.appChange	✓	✓
<input type="radio"/> Application COTS Template	csk.appCOTS	✓	✓
<input type="radio"/> Infrastructure Template	csk.infrastructure	✓	✓
<input type="radio"/> MB Template	PR000092	✓	✓
<input type="radio"/> new template	PR000148	✓	✓
<input type="radio"/> SDLC Template	csk.majorIT	✓	✓

Add Resources Using “Add/Update By OBS”

- Add resources to a project by OBS by going to the Project > Team > Add/Update by OBS

Project: A Test Project - Team - Staff

Filter: System Default ▼

<input type="checkbox"/>		Resource/Role▲	Project Role	Primary
<input type="checkbox"/>		Benson, Bradley	Business Analyst	
<input type="checkbox"/>		Bishop, Mike	Project Manager	
<input type="checkbox"/>		Borruso, Tony	Test Engineer	
<input type="checkbox"/>		Chouhan, Vipin	Developer	
<input type="checkbox"/>		Scarlato, Jennifer	Architect	
Total				

Save Add **Add/Update by OBS** Return

Investment: : A Test Project - Add/Update by OBS

General

☒ OBS Unit Financial Department:Rego Consulting

OBS Filter Mode Unit and descendants ▼

Start Date Reset to Match Investment Start Date ☒

Finish Date Reset to Match Investment Finish Date ☒

Default Allocation %

Update currently assigned OBS members ☒

Add new OBS members ☒

Existing Allocation Segments

Clear existing allocation segments ☐ (Select to clear all allocation segments for all OBS members)

New Allocation Segments

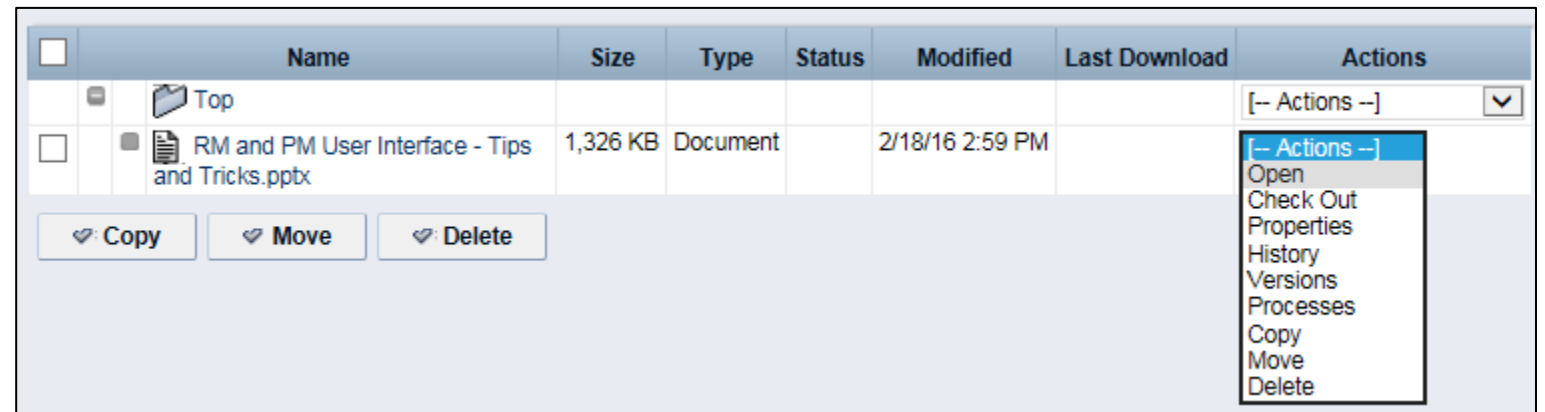
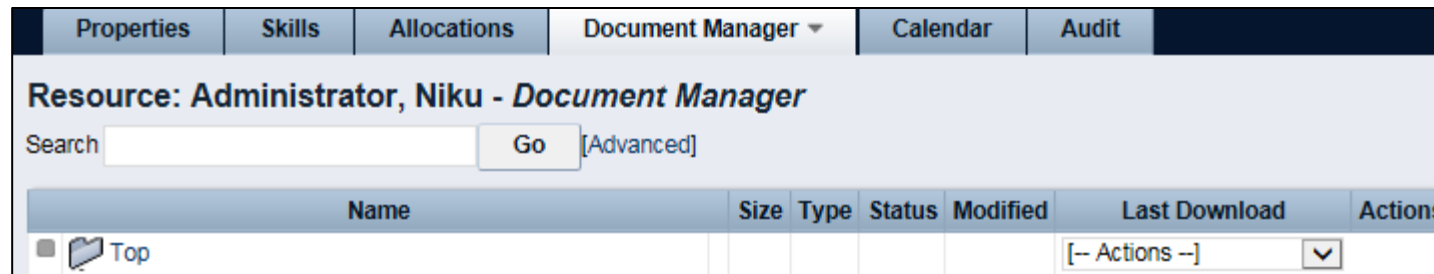
<input type="checkbox"/>	Start	Finish	% Allocation
<input type="checkbox"/>	10/19/2015	12/31/2015	100.00%
<input type="checkbox"/>	1/1/2016	2/29/2016	25.00%
<input type="checkbox"/>	3/1/2016	6/30/2016	75.00%
<input type="checkbox"/>	7/1/2016	2/24/2017	100.00%
<input type="checkbox"/>			

New Row Delete

Apply Return

Resource Document Manager

- Document Manager on the Resource Profile is personal document storage for the resource
- Allows for checking out and version control



Add Actuals To The Resource Workloads Portlet

- Easily compare Availability, Allocations, Actuals and ETCs across all Projects by Resource or OBS
- Change from a “Column Graph” to “Number” and add the desired fields to the “virtual” Allocation field

Resource Views: Workloads													
Resource Workloads													
Resource▲	Resource ID	Primary Role		Allocation									
				Sep 15	Oct 15	Nov 15	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16
America, Captain	captain_america	Developer	Availability Rate	176.00	176.00	168.00	184.00	168.00	168.00	184.00	168.00	176.00	176.00
			Allocation	1,320.00	1,320.00	1,136.00	1,128.00	1,344.00	1,336.00	1,288.00	1,048.00	704.00	704.00
			Actuals	126.00	105.00	25.00							
			ETC			11,082.00	184.00	248.46	248.46	272.12	248.46	260.29	260.29
Ayala, Juan	jayala	Network Engineer	Availability Rate	176.00	176.00	168.00	184.00	168.00	168.00	184.00	168.00	176.00	176.00
			Allocation	457.60	457.60	436.80	502.40	436.80	436.80	478.40	260.80	105.60	105.60
			Actuals	135.00	112.00	30.00							
			ETC	56.00	136.00	43.20	27.60	25.20	25.20	27.60	25.20	26.40	26.40
Almeida, Joe	jalmeida		Availability Rate	176.00	176.00	168.00	184.00	168.00	168.00	184.00	168.00	176.00	176.00
			Allocation	704.00	704.00	616.00	576.00	504.00	504.00	552.00	432.00	352.00	352.00
			Actuals										
			ETC	48.00									

Update Resource Management Data In A Grid

- Save time and update Allocations right in a grid portlet for your entire team
- Go to the Weekly Detail portlet and click the cell to update
- Save your changes

Workloads

Capacity

Allocations

Booking Status

Unfilled Roles

Aggregation

Resource Views: Allocations

Scenario: [--Select--]

Weekly Detail

		Resource▲		Investment Role	Investment	Allocation									
						2/15/16	2/22/16	2/29/16	3/7/16	3/14/16	3/21/16	3/28/16	4/4/16	4/11/16	4/18/16
	🔍	Admin, PMO	👤=	✉	Server Farm	Allocation Resource Availability	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	🔍	Admin, Rego	👤=	✉	ADVS Cemetery Memorial Site - 15950 N Lockett	Allocation Resource Availability	40.00	20	20	20	20	20	20	20	8.00
							40	40	40	40	40	40	40	40	40.00

Adjust Work Effort in TSV

- Your Portlet > Options > Configure > List Column Section > Options > Work Effort Unit of Measure
- If an update is made in one option (FTE) it will be translated into another value if adjusted

General List Column Section List Filter Section

Portlet: Role Capacity - List Options

Display Options

Secondary Value Display ☐ Mouseover only ☒ Mouseover and redline text

Work Effort Unit of Measure ☒ FTE

System Default
Hours
Days
FTE
% Availability

Save Save And Return Return

Time Slice Extension

- **In the Out of the Box configuration the date ranges are as follows:**
 - 28 Daily - One week in the past, the current day and 3 weeks in the future
 - 16 Weekly - 2 weeks in the past, the current week and 13 weeks in the future
 - 36 Monthly - 4 quarters in the past, the current quarter and 7 quarters in the future
 - Year, Quarter and Monthly periods all use monthly slices
- **With the extension, the new internal time slice ranges will be as follows:**
 - 42 Daily - 7 days in the past, the current day and 4 weeks in the future
 - 45 Weekly - 4 weeks in the past, the current week and 40 weeks in the future
 - 51 Monthly - 4 quarters in the past, the current quarter and 12 quarters in the future
 - Year, Quarter and Monthly periods all use monthly slices
- This is enabled via a simple .xml file provided by CA Support. On Demand customers are able to open a ticket and have it installed. On Premise open a ticket to receive the .xml file

Old School – Keyboard Shortcuts

Navigation	Keystrokes
Home Menu	Ctrl+Alt+h
Administration Menu	Ctrl+Alt+a
Favorites Menu	Ctrl+Alt+f
Back	Ctrl+Alt+b or Alt+Left Arrow
Home Page	Ctrl+Alt+Home
Refresh	Ctrl+Alt+F5
Search	Ctrl+Alt+s
History	Ctrl+Alt+v
Help	F1

Part 2: CA PPM 15.4 New UX

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Let Rego be your guide.

New UX: Excel-like Functionality

Along with easier copy/Paste functionality, the new UX allows you to quickly add and remove columns from Staffing and Financial views

When hovering to the left of a value in the Totals section you will be presented with a menu:

- 1) Column Settings
- 2) Filtering
- 3) Add Remove Columns

The screenshot displays the 'CA PPM' interface. The main table shows data for various roles across different time periods (Apr 1, 2018-Apr 30, 2018; May 1, 2018-May 31, 2018; Jun 1, 2018-Jun 30, 2018; Jul 1, 2018-Jul 31, 2018) and a 'TOTALS' column. The table has columns for 'FTE' and 'FORECAST'. The interface includes a sidebar with navigation icons, a top bar with 'CA PPM' and user info, and a search bar. Three red boxes and numbers highlight key features: 1) A context menu for column actions (Pin, Autosize, Reset, Tool Panel) triggered by hovering over a column header. 2) A filter dropdown menu for the 'FTE' column. 3) A large menu for adding and removing columns, including options for time periods and metrics like Hours, FTE, and Forecast.

New UX: Mixed Timescales

In Staffing Views we can have a mix of timescales such as Monthly, Quarterly and Annually - All in one view!!

The screenshot displays the 'STAFFING' settings panel and a table view. The settings panel includes options for 'START PERIOD', 'TIME PERIOD SPAN', 'UNIT OF MEASURE', 'DECIMAL DISPLAY', 'CURRENCY', and 'ALLOCATION THRESHOLD'. The table view shows data for 'Month', 'Quarter', and 'Year' timescales, with columns for 'FTE' and 'FORECAST' for each period. Red boxes highlight the 'TIME PERIOD SPAN' settings and the table headers, with red arrows indicating the relationship between the settings and the table view.

SETTINGS

PROFILE

STAFFING

START PERIOD: [Current Time Period](#) →

TIME PERIOD SPAN: Select a period type for each span. You can create a total of 60 time periods across all time period spans.

1: Monthly 6

2: Quarterly 2

3: Annual 1

4: Optional

UNIT OF MEASURE: ☒ FTE ☐ Hours

DECIMAL DISPLAY: ☒ 0.00 ☐ 0.0 ☐ 0

CURRENCY: \$USD

ALLOCATION THRESHOLD: The Resources to Investments view determines the telescope gradient colors based on allocation data by resource. Set the gradient scale to indicate resources that need your attention over any time period. Hover over any color to see the threshold range.

Resources Investments Search or filter...

Month Quarter Year

	Jul 1, 2018-Jul 31, 2018		Aug 1, 2018-Aug 31, 2018		Sep 1, 2018-Sep 30, 2018		Oct 1, 2018-Dec 31, 2018		Jan 1, 2019-Dec 31, 2019		TOTALS	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
×	37.37	0	37.39	0	37.38	0	35.45	0	3.33	0	17.87	0
> A Crawford	0	0	0	0	0	0	0	0	0	0	0	0
> A Eckenrod	0	0	0	0	0	0	0	0	0	0	0	0
> A Garcia	0	0	0	0	0	0	0	0	0	0	0	0
> A Haro	0	0	0	0	0	0	0	0	0	0	0	0
> A Leon	0	0	0	0	0	0	0	0	0	0	0	0
> A Marchbanks	0	0	0	0	0	0	0	0	0	0	0	0
> A McElyea	0	0	0	0	0	0	0	0	0	0	0	0
> A Riesgo	0	0	0	0	0	0	0	0	0	0	0	0
> A Valenzuela	0	0	0	0	0	0	0	0	0	0	0	0
> A Wojnar	0	0	0	0	0	0	0	0	0	0	0	0

New UX: Roadmaps Overview (1)

- 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

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			✓

CA PPM

ROADMAP AUTHOR

New UX: Roadmaps Overview (2)

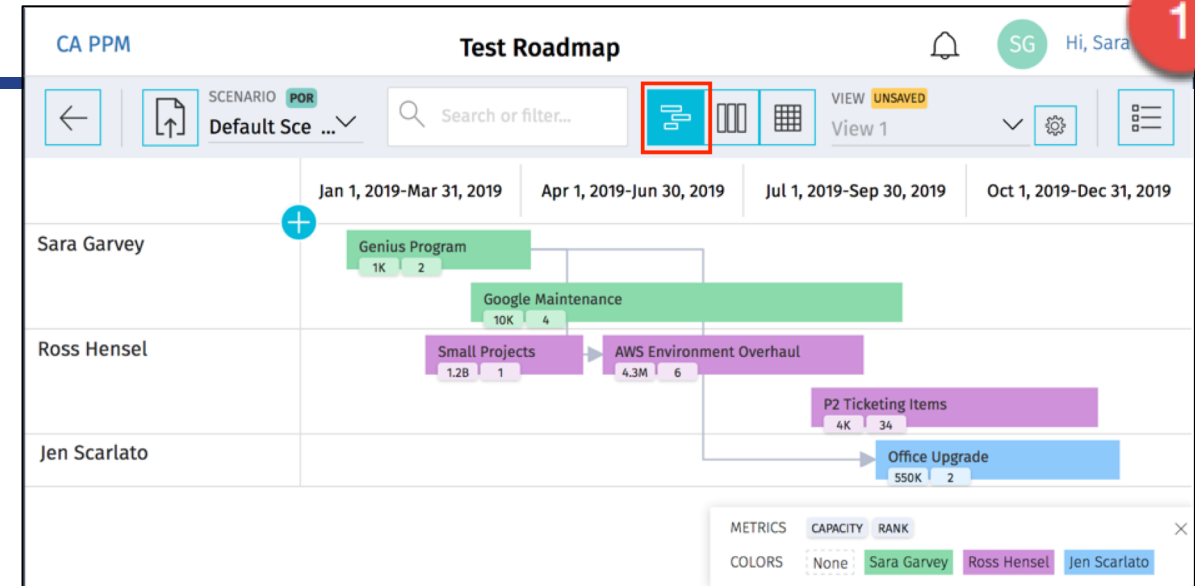
- **Roadmaps are not tied to Projects, Ideas, etc., and can not be synchronized with Projects/Ideas – they are entirely separate objects.**
- Fiscal Period based – based on system base entity
- Supports view by yearly, monthly and quarterly fiscal periods.
- Can change zoom level, periods
- Can change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

New UX: Roadmap Views

- 3 Roadmap Views:

1. Timeline
2. Board
3. Grid

- Can add items and edit in all 3 views



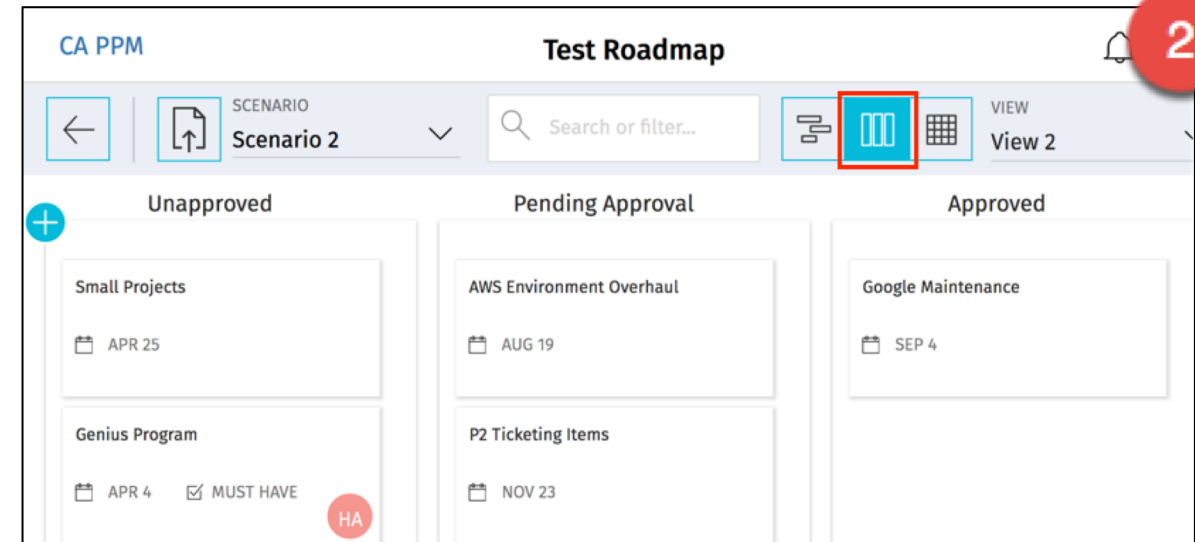
CA PPM Test Roadmap

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



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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