

# Upgrades | Best Practices

Your Guide: <Name of Presenters>



# Introductions

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



# Agenda

- Why Upgrade?
  - Key Functional Features
  - Open Discussion
- Upgrade Process
  - Planning
  - Execution
  - Open Discussion
- Wrap-up

# Introduction

There's an upgrade in your future?

Do you want to understand the costs, durations, and lessons learned?

We'll review existing and upcoming releases, the pros and cons of moving to various versions, and upgrade strategies, so you can prepare your budget and plan.

# Key New Features

- New User Experience - Project and Time (15.1)
- Portfolio Roles Increased from 25 to 75 (15.1)
- New User Experience – Resource Management (15.2)
- Notifications and Tagging (15.2)
- Project Document Management (15.2)
- Timesheet Submission for Any User (15.2)
- New User Experience – Blueprints (15.3)
- New User Experience – Roadmap (15.4)
- Datamart Extraction – ability to limit to OBS/Calendar (15.4)
- Running reports via Reports / Jobs – output to PPT or PDF (15.3), XLS (15.4)

# Key Changes in 15.4 – Changes in Classic UX

- Classic UX Changes:

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

# Key Changes in 15.4 – Changes in New UX

- New UX Changes:
  - New Roadmap functionality
  - Enhanced filtering
  - Create and edit Cost Plans
  - Editable OBS
  - Longer To-Dos
  - Personal Tasks view
  - Additional data available in Projects – Risks, Issues, Changes
- Support for IE 11 dropped in the New UX with this release.
- Expected to drop IE11 support for Classic UX with release version in 2019.

# Open Mic

- Why have you upgraded?

OR

- Why have you NOT upgraded?



# End of Life Announcements

Version	EOL Date
13.3	October 31, 2016
14.1 & 14.2	June 30, 2017
14.3**	December 31, 2017
14.4	October 31, 2018
15.1	April 30, 2019

\*\*Last version with Business Objects

\*\*Must migrate to Tomcat (WebSphere no longer supported)

CA does honor maintenance contracts that extend beyond the EOL date

# Open Mic

- Three types of upgrades
  1. **Fresh Start:** Start over with a clean environment in a new version of CA PPM and we are able to migrate specific data sets
  2. **Traditional:** Performing an upgrade to a new version of CA PPM in either an On Demand or On Premise environment
  3. **Move to On Demand from On Premise during upgrade:** CA will automatically upgrade your environment as part of an On Demand upgrade

Share your experiences

# Upgrade Process: Planning

- Infrastructure – Validate architecture, sizing and capacity of current environment to support requirements for new version, including both Business Objects and Jaspersoft (refer to Release Notes of target version). Plan for changes as required
- Client Applications – Browsers, MS Office (or other), MS Project, Open Workbench, etc. Validate version compatibility. Plan for changes as required
- Plan for the upgrade in a DEV/TEST environment. Prior to upgrading, ensure the data is refreshed with PROD data

# Upgrade Process: Planning

- Capture a pre-upgrade image of CA PPM for comparison with post-upgrade image
- Perform a DB refresh of PROD into the Test environment, to enable a side-by-side comparison after upgrade, and to ensure you are testing the full PROD configuration
- For On Demand environment, all these refreshes and upgrades must be scheduled with CA SaaS team
  - PROD upgrades are always scheduled to start on Fridays, at 8pm Pacific Time
  - Non-PROD upgrades are always scheduled to start on Monday/Tuesday, at same time
  - Note: CA schedules a maintenance outage for On Demand sites the second weekend of each month

# Upgrade Process: Planning

- Plan for new functionality that will impact your business processes. A best practice is to perform the upgrade first, and then implement new functionality as a separate project
- Plan to engage a slice of the organization for conducting UAT, especially for business processes. If you have multiple business units represented (IT, R&D, etc), get users from each group
- Plan to conduct training on new functionality. This cannot be over-emphasized

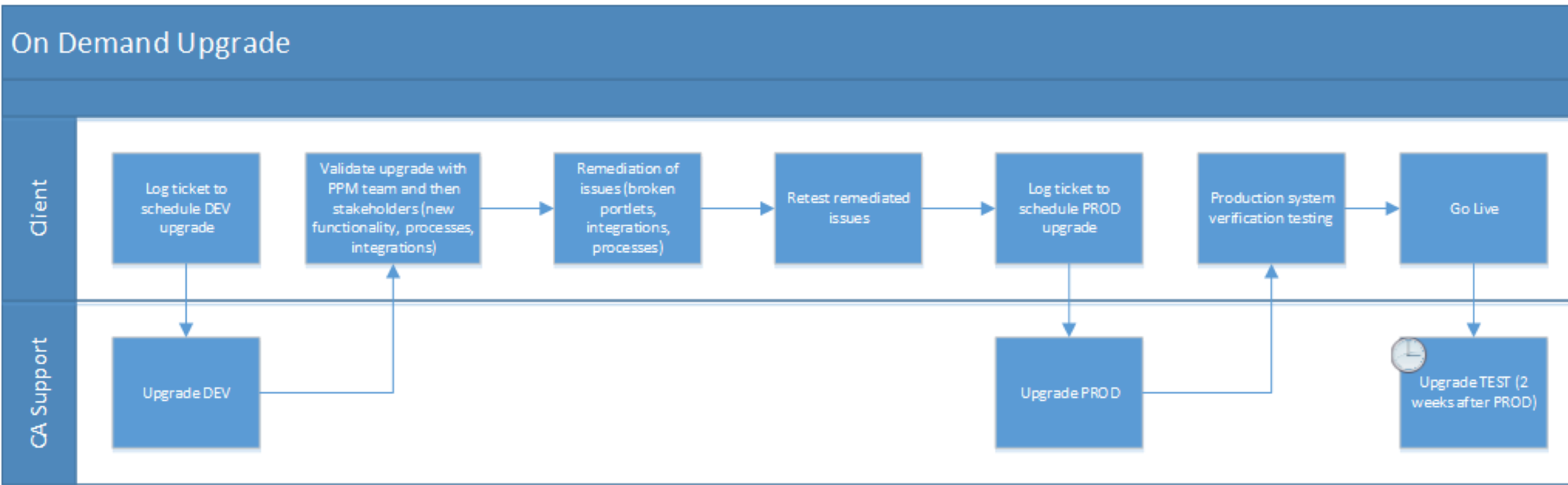
# Upgrade Process: Execution

- Perform upgrade of test environment
- Develop a Run Book of the upgrade at the Dev upgrade stage, follow it to a 'T' in Test and PROD should go like clock-work with the Run book
- Validate upgrade by comparing current configuration image with pre-upgrade image
- Document all variances, and correct errors. This will become your remediation checklist when upgrading PROD

# Upgrade Process: Execution

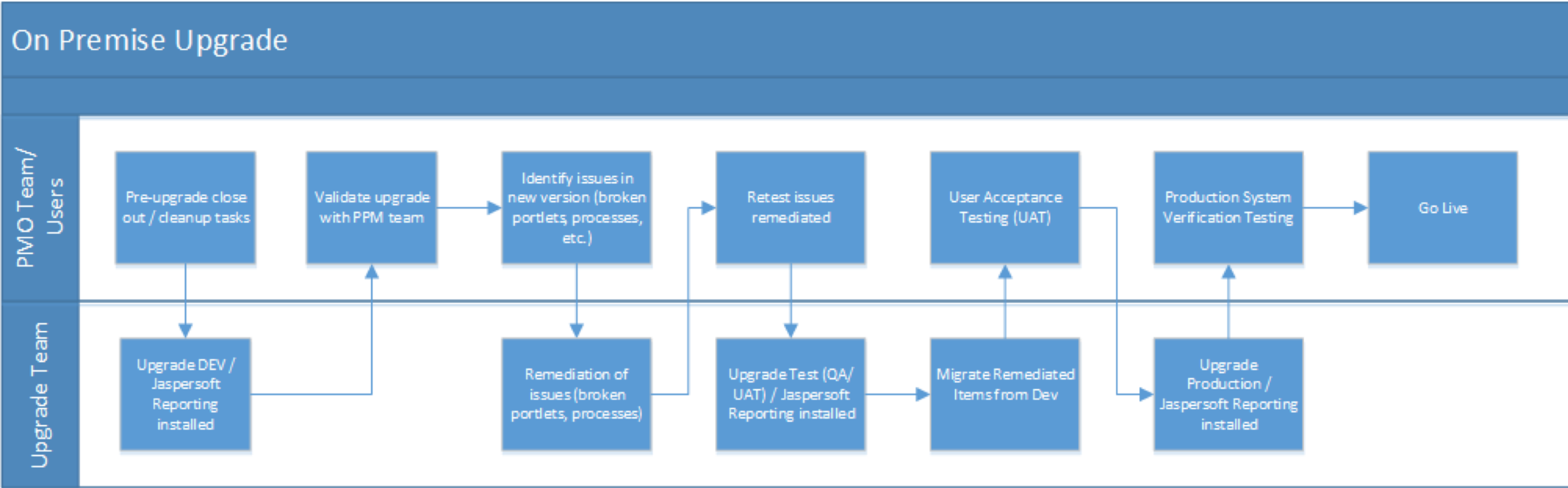
- Run UAT scripts on business processes
- Setup Jaspersoft Data Warehouse configuration (CA will NOT perform this setup for On Demand environments. They will install the software, but not run the setup.)
- Prepare training materials and communication plan for new functionality

# Upgrade Process: On Demand – Happy Path





# Upgrade Process: On Premise – Happy Path



# Open Mic

- How often do you upgrade?
- What have been your biggest challenges in upgrading?
- Any success stories?
- Please remember to fill out the class survey

# Questions?



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Let us know how we can improve!  
Don't forget to fill out the class survey.



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