

Spain & Portugal

CA Clarity User Group Meeting

- CA Technologies

Wednesday, June 17, 2015

Agenda

1

JASPERSOFT REPORTING & CA PPM DATA WAREHOUSE

2

CA PPM ENABLES SAFe

3

RALLY. ACQUISITION AGREEMENT

Jaspersoft Reporting & CA PPM Data Warehouse

What to Expect When You're Expecting ... 14.2 (Reporting)



CA PPM – Jaspersoft Overview

Lightweight, easy to use, drag-and-drop, self-service ad hoc reporting capability

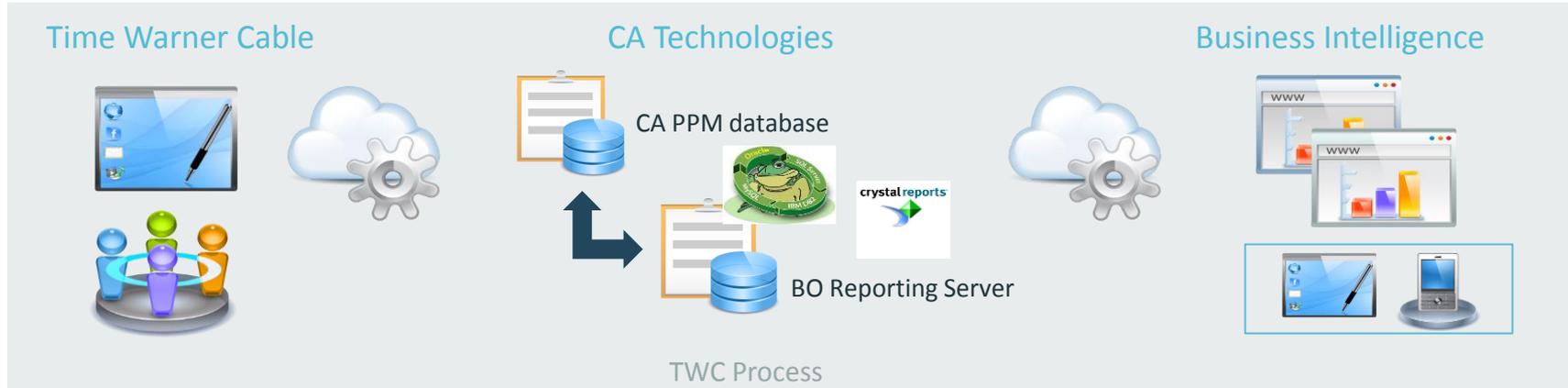
- Jaspersoft provides a simple and powerful experience.
 - **Integrated:** Access ad hoc reporting from within CA PPM. Custom attributes and objects available for reporting.
 - **Self-service:** No separate log ins, no steep learning curves. Users get the information they need, export it, email it, and consume it as they want
 - **Powerful:** Jaspersoft is a reporting toolset used to develop sophisticated reports similar to Crystal Reports in BO.

- ****Note** – You can stay on Business Objects for a limited time. Refer to the Jaspersoft FAQ on the CA Support Site for more details.

CA PPM – Jaspersoft - Overview (cont'd)

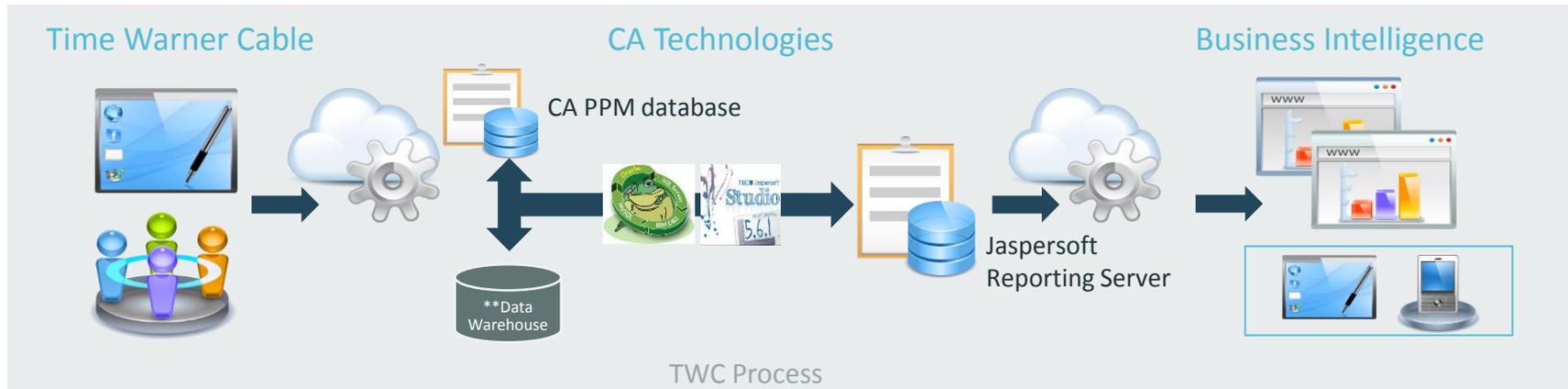
- Jaspersoft and the Data Warehouse: Why a Data Warehouse?
 - **Easy access:** The data warehouse simplifies the data model and makes end user ad hoc reporting simple and powerful. This reduces the demand for custom report development and delivers powerful information to your users – when they need it.
 - **More performant:** The data warehouse schema resides on another database server taking the stress off the transactional CA PPM database.
 - **Any reporting solution:** You can access the information in the data warehouse from any reporting solution. We deliver it – you consume it as you see fit.

Reporting Architecture – “As Is” on 13.2



- End Users input data into CA PPM (Ideas, Status Reports, Project Schedules, Risks, Issues, etc.).
- CA PPM team writes a ‘Read Only’ SQL query against the production CA PPM Database using TOAD.
- Once the query returns the correct result set, we embed the query into the Crystal Report.
- Next we complete the report design in Crystal Reports and publish it to the BO Report Server.
- Finally we create the report link in the CA PPM Report Library and map it to the corresponding report on the BO Report Server.

Reporting Architecture – “To Be” on 14.2

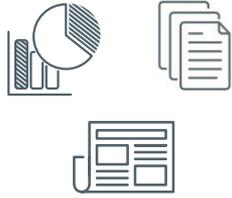


- End Users input data into CA PPM (Ideas, Status Reports, Project Schedules, Risks, Issues, etc.).
- CA PPM team writes a ‘Read Only’ SQL query against the CA PPM Database/Data Warehouse.
- Once the query returns the correct result set, we embed the query into the Jaspersoft Report.
- Next we complete the report design in Jaspersoft and publish it to the Jaspersoft Report Server.

**Note – you will need to run the “Load the Data Warehouse job(s)” if you are writing your query against the Data Warehouse.

CA PPM Jaspersoft - Overview

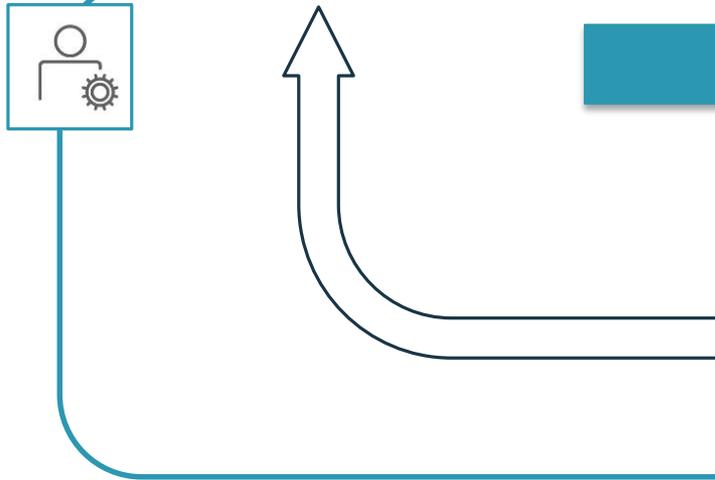
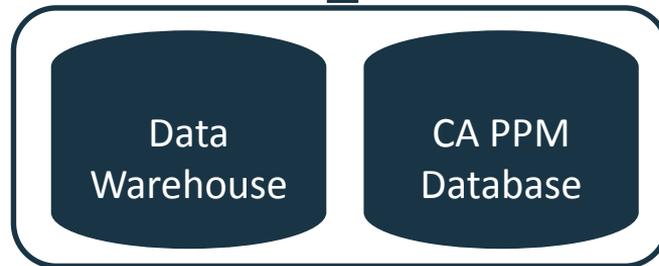
Jaspersoft Studio Reports



Ad Hoc Reports



Ad Hoc Reports



Data Warehouse Setup

The screenshot shows the Clarity PPM Administration interface. The main content area is titled 'Object: Strategic Objective - Properties'. The 'Object Name' is 'Strategic Objective' and the 'Object ID' is 'strategic_objective'. The 'Content Source' is set to 'Customer'. The 'Description' field is empty. The 'Master or Subobject' section has 'Master' selected. The 'Partition Model' field is empty. The 'Master Object' field is empty. The 'Event Enabled' checkbox is unchecked. The 'Include in the Data Warehouse' checkbox is checked. The 'Copy Enabled' checkbox is unchecked. The 'Export Enabled' checkbox is unchecked. The 'View All Enabled' checkbox is unchecked. At the bottom, there are buttons for 'Save', 'Save And Return', and 'Return'. A legend indicates that a red square icon means 'Required' and a green square icon means 'Enter Once'.

- Customer-specific objects can be included in the data warehouse via Studio. Simply check the box for 'Include in the Data Warehouse.'
- The attributes of the object also need to be selected manually for inclusion into the data warehouse.

- Customer Specific Objects

The “End User Experience”

Clarity PPM

Home Administration Favorites

Clarity Advanced Reporting

Library View Manage Create

Options

Project OBS Unit

Project Manager

Project

Project Status

Work Status

Amount Type

Risk, Issue, and Change Request Priority

Risk, Issue, and Change Request Status

Include Inactive Projects?

Include Inactive Resources?

Apply Reset Save

Project Status Detail Data refreshed Oct 27, 2014 at 11:06:37 AM

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100%

search report

Back

Project Status Detail: Change Mgt for Internal Portal

Project ID	PR1024	Status Report Date	12/18/2014	Stage	Initiation	Status Report Indicators				
Project Manager	McCarthy, John	Previous Report Date	12/11/2014	Finish Date	3/21/2015	Overall				
Project Type	Application Change	Status	Unapproved	Baseline Finish Date	3/21/2015	Schedule				
Goal	Maintain the Business	Progress	Not Started	Days Late	0	Scope				
Status Report Update				(Hours)		Cost and Effort				
Thanks to the executive team intervening we finally have a scope of what needs to be updated and how to proceed.				Baseline	1,600.00	Project Indicators				
				Actuals	0.00	Schedule to Baseline				
				ETC	1,600.00	Alignment				
				EAC	1,600.00	Risk				
				Projected Effort Variance	0.00	Issue				
				Projected Effort Variance %		Change				
Project Objective										
Requests for Change from Service Desk for enhancements/support issues concerning the Corporate Internal Portal.										
Project Team										
Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Architect	Architect	12/4/2014	12/11/2014	3/21/2015	1/5/2015	Soft	New	160.00	0.00	160.00
Business Analyst	Business Analyst	12/4/2014	12/11/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Developer	Developer	12/4/2014	1/1/2015	3/21/2015	2/24/2015	Soft	New	328.00	0.00	320.00
Network Engineer	Network Engineer	12/4/2014	12/25/2014	3/21/2015	2/28/2015	Soft	New	216.00	0.00	240.00
Project Manager	Project Manager	12/4/2014	12/4/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Storage Architect	Storage Architect	12/4/2014	12/25/2014	3/21/2015	1/19/2015	Soft	New	160.00	0.00	160.00
Test Engineer	Test Engineer	12/4/2014	2/6/2015	3/21/2015	2/28/2015	Soft	New	136.00	0.00	160.00
Key Milestones										
Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule				

The “End User Experience” – Power Point

Project Status Detail: Change Mgt for Internal Portal

Project ID	PR1024	Status Report Date	12/18/2014	Stage	Initiation	Status Report Indicators				
Project Manager	McCarthy, John	Previous Report Date	12/11/2014	Finish Date	3/21/2015	Overall				
Project Type	Application Change	Status	Unapproved	Baseline Finish Date	3/21/2015	Schedule				
Goal	Maintain the Business	Progress	Not Started	Days Late	0	Scope				
						Cost and Effort				
Status Report Update						(Hours)	Project Indicators			
Thanks to the executive team intervening we finally have a scope of what needs to be updated and how to proceed.						Baseline	1,600.00	Schedule to Baseline		
						Actuals	0.00	Alignment		
						ETC	1,600.00	Risk		
						EAC	1,600.00	Issue		
						Projected Effort Variance	0.00	Change		
						Projected Effort Variance %				
						Project Objective				
						Requests for Change from Service Desk for enhancements/support issues concerning the Corporate Internal Portal.				

Project Team										
Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Architect	Architect	12/4/2014	12/11/2014	3/21/2015	1/5/2015	Soft	New	160.00	0.00	160.00
Business Analyst	Business Analyst	12/4/2014	12/11/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Developer	Developer	12/4/2014	1/1/2015	3/21/2015	2/24/2015	Soft	New	328.00	0.00	320.00
Network Engineer	Network Engineer	12/4/2014	12/25/2014	3/21/2015	2/28/2015	Soft	New	216.00	0.00	240.00
Project Manager	Project Manager	12/4/2014	12/4/2014	3/21/2015	3/21/2015	Soft	New	272.00	0.00	280.00
Storage Architect	Storage Architect	12/4/2014	12/25/2014	3/21/2015	1/19/2015	Soft	New	160.00	0.00	160.00
Test Engineer	Test Engineer	12/4/2014	2/6/2015	3/21/2015	2/28/2015	Soft	New	136.00	0.00	160.00

Key Milestones							
Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule	

The “End User Experience” – iPad Screenshot ...

The screenshot displays the Clarity PPM mobile interface. At the top, the Clarity PPM logo is on the left, and the user 'Niku Administrator' is logged in. Below the navigation bar, the 'Clarity Advanced Reporting' section is active. The main content area shows a 'Project Status Detail' report for 'Change Mgt for Online Order Entry'. The report includes a summary table with project metadata, a 'Status Report Update' section with a text description, a table of project metrics (Baseline, Actuals, ETC, EAC, Projected Effort Variance), and a 'Project Objective' section. At the bottom, a 'Project Team' table lists team members and their roles.

Project ID	PR1026	Status Report Date	10/14/2014	Stage	Building	Status Report Indicators				
Project Manager	McCarthy, John	Previous Report Date	10/7/2014	Finish Date	10/22/2014	Overall	◆ ◆			
Project Type	Application Change	Status	Approved	Baseline Finish Date	10/22/2014	Schedule	◆ ◆			
Goal	Maintain the Business	Progress	Started	Days Late	2	Scope	◆ ◆			
Status Report Update				(Hours)		Cost and Effort	◆ ◆			
Technical aspects of the project are progressing well; we are having some issues with the "people" side of the changes. The employees are reluctant to adapt to the new system.				Baseline	56.00	Project Indicators				
				Actuals	0.00	Schedule to Baseline	◆			
				ETC	56.00	Alignment	◆			
				EAC	56.00	Risk	◆			
				Projected Effort Variance	0.00	Issue	◆			
				Projected Effort Variance %	◆	Change	◆			
				Project Objective						
				Change Management RFCs for the Online Order Entry Application. RFC's are fed from Service Desk as part of the ITIL based change mgt process.						
Project Team										
Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Patel, Sanjay	Developer	10/4/2014	10/4/2014	10/22/2014	10/22/2014	Soft	New	76.00	0.00	56.00

The “End User Experience” – Scheduling

The screenshot shows the 'New Schedule' configuration page in the Clarity Advanced Reporting application. The page is titled 'New Schedule' and has a breadcrumb trail: Home > Administration > Favorites. The main content area is divided into several sections:

- Schedule For:** /ca_ppm/reports/project_management/CSK_PRI_ProjectStatusDetail
- Schedule Start:**
 - Start Date: Immediately, On Specific Date: 2014-10-27 00:00
 - Time Zone: America/New_York - Eastern Standard Time
- Recurrence:**
 - Recurrence Type: Calendar
 - Months: Every Month, Selected Months: Jan
 - Days: Every Day, Selected Days: Sun, Dates in Month: (empty)
 - Times: Hours (required): 0, Minutes (required): 0
- Schedule End:** End Date: (empty)
- Holidays:** Calendar of dates to exclude: None

At the bottom of the page, there are 'Save' and 'Cancel' buttons.

The “End User Experience” – Output Options

Clarity Advanced Reporting

Library View Manage Create

New Schedule

Schedule For: /ca_ppm/reports/project_management/CSK_PRJ_ProjectStatusDetail

Output File Options

File name (required):

Description:

Time Zone:

Output Locale:

Formats:

<input type="checkbox"/> CSV	<input checked="" type="checkbox"/> HTML	<input type="checkbox"/> RTF
<input type="checkbox"/> DOCX	<input type="checkbox"/> ODS	<input type="checkbox"/> XLSX
<input type="checkbox"/> Excel	<input type="checkbox"/> ODT	<input type="checkbox"/> XLSX (Paginated)
<input type="checkbox"/> Excel (Paginated)	<input checked="" type="checkbox"/> PDF	<input checked="" type="checkbox"/> PPTX

File Handling:

Overwrite Files

Sequential File Names by Timestamp

Timestamp Pattern:

Output Destination

Output To Repository

Output To Host File System

Output To FTP Server
Server Address:
Directory:
Username:
Password:

Enable FTPS
Port:

The “End User Experience” – Notifications

Clarity Advanced Reporting

Library View Manage Create

New Schedule

Schedule Parameters Output Options Notifications

Schedule For: /ca_ppm/reports/project_management/CSX_PRJ_ProjectStatusDetail

Email Notification

Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:

Include reports as repository links in email body

Include report files as attachments

Include report files as ZIP attachment

Include HTML report in email body

Do not send emails for empty reports

Send job status notifications

To:

Use commas to separate addresses

Subject:

Send success notification

Success Message:

Send failure notification

Failure Message:

Include report job information

Include stack trace

Security Rights – Advanced Reporting

The screenshot shows the Clarity PPM Administration interface. The breadcrumb trail is: Home > Administration > Favorites > Resource's Access Rights > Access to this Resource. The page title is "Resource: Niku Administrator - Global Access Rights". Below the title, it says "Below are this resource's global rights." There are search filters: "Access Right" with the value "Advanced*", "Description" (empty), and "Granted Through" with the value "All". There are three buttons: "Filter", "Show All", and "Clear". Below the filters is a table with the following data:

<input type="checkbox"/>	Access Right▲	Description	Granted Through
<input type="checkbox"/>	Advanced Reporting - Ad Hoc Create	Allows resource to navigate to the Advanced Reporting page and create Ad Hoc Views. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_ADHOC_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Administer	Allows resource to navigate to the Advanced Reporting page and administer Advanced Reporting. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_ADMINISTRATOR.	Resource
<input type="checkbox"/>	Advanced Reporting - Dashboard Create	Allows resource to navigate to the Advanced Reporting page and create Dashboards. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_DASHBOARD_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Data Source Create	Allows resource to navigate to the Advanced Reporting page and create Data Sources. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_DATASOURCE_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Domain Create	Allows resource to navigate to the Advanced Reporting page and create Domains. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_DOMAIN_DESIGNER.	Resource
<input type="checkbox"/>	Advanced Reporting - Navigate	Allows resource to navigate to the Advanced Reporting page. Resource is assigned Jaspersoft role as ROLE_USER.	Resource
<input type="checkbox"/>	Advanced Reporting - Report Create	Allows resource to navigate to the Advanced Reporting page and create Reports. Resource is assigned the following Jaspersoft roles: ROLE_USER and ROLE_REPORT_DESIGNER.	Resource

Navigation and Repository - Overview

EASY TO USE NAVIGATION TILES WITHIN CA PPM

- **Navigation**
 - Access via the Advanced Reporting menu option in CA PPM
 - Tiles to create and view items display based on access rights
 - Open recently viewed items or quickly search for ad hoc views and reports
- **Repository**
 - Easy to use with an Outlook-like folder structure
 - CA PPM folder should not be overwritten – make a copy for editing

Navigation and Repository

Clarity PPM Paul Martin Logout Learn Help About

Home Favorites

Clarity Advanced Reporting

Library View Create

Home

Recently Viewed Items	
Project Storyboard	Report
Financial Forecast Review by Investment	Report
Time Compliance	Report
Project Status Detail	Report
KPIs by Project Type	Report
Project Portfolio Summary	Report
Resource Forecasted Utilization	Report
Capacity vs. Allocation by OBS	Report

Ad Hoc Views

Visualize your data for analysis and report creation. [View tutorial](#)

Create View list

Reports

Create and format interactive reports from existing Ad Hoc views. [View tutorial](#)

Create View list

Dashboards

Combine related reports into custom dashboard layouts. [View tutorial](#)

Create

Jaspersoft Ad Hoc Views - Overview

CREATE QUICK, SOPHISTICATED VIEWS INTO YOUR DATA

- What is the Ad-Hoc Viewer?
 - An interactive web-based designer for creating and editing views to explore and analyze data and/or for reporting
 - Answers the requirement: “Show me the data”
- New Capabilities
 - One view of the data - the ad hoc viewer is embedded into CA PPM
 - Reuse and share the views by saving to the repository
 - Better performance – the views run against the Data Warehouse

Demonstration of Jaspersoft Ad Hoc Report - Table

The screenshot displays the Jaspersoft Ad Hoc Report interface. The main content area shows a table titled "Project Allocations by Manager". The table is filtered by "Investment Manager" and displays data for two managers: Berks, Paul and Martin, Paul. The table columns are Project Name, Start Date, Finish Date, and Total Allocated Hours. The total for Berks, Paul is 6 projects with 9,104.00 hours, and for Martin, Paul is 6 projects with 10,996.00 hours. The grand total is 12 projects with 20,100.00 hours.

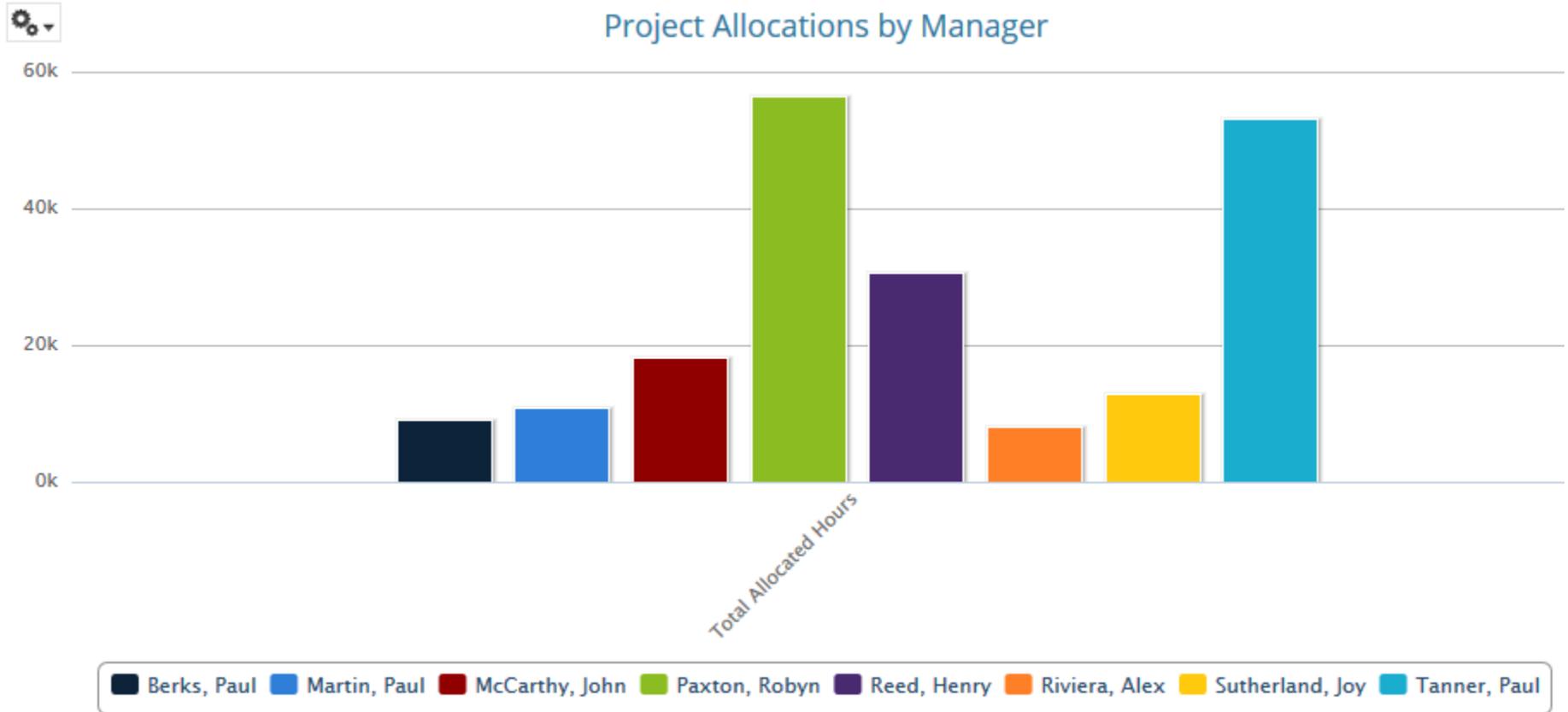
	Project Name	Start Date	Finish Date	Total Allocated Hours
Berks, Paul				
	Order Trending Analysis	Oct 1, 2014	Jan 22, 2015	1,616.00
	Email SAN Storage Implementation	Nov 1, 2014	Feb 23, 2015	1,016.00
	Automated Security Enhancements	Nov 1, 2014	Feb 16, 2015	1,680.00
	Credit Card Processing Enhancement	Nov 1, 2014	Feb 9, 2015	2,840.00
	Executive Dashboard Visibility	Oct 1, 2014	Feb 1, 2015	1,952.00
	Financial Workflow Development	Dec 1, 2014	Feb 28, 2015	0.00
Berks, Paul Totals	6			9,104.00
Martin, Paul				
	Data Warehouse Performance Tuning	Oct 1, 2014	Feb 13, 2015	1,968.00
	Online Order Performance Improvements	Oct 1, 2014	Jan 22, 2015	1,616.00
	Client Services Datamart	Oct 1, 2014	Feb 9, 2015	1,992.00
	Financial Process Audit	Nov 1, 2014	Feb 23, 2015	1,616.00
	eCommerce Portal	Aug 1, 2014	Mar 11, 2015	2,084.00
	Online Order Catalog	Oct 1, 2014	Dec 12, 2014	1,720.00
Martin, Paul Totals	6			10,996.00
	12			20,100.00

Demonstration of Jaspersoft Ad Hoc View – Cross Tab

Financial Planned vs. Forecast Cost by Period

		⊕ Fiscal Year	⊖ 2014					⊖ 2015	⊕ 2016	Totals	
		Fiscal Quarter	2014-Q1	2014-Q2	2014-Q3	2014-Q4	Totals	Totals	Totals	Totals	
⊕ Cost Type	Transaction Class	Measures									
⊖ Capital	External Labor	Plan Cost			\$89,000	\$939,240	\$1,028,240	\$2,041,580	\$34,720	\$3,104,540	
		Forecast Cost			\$0	\$939,240	\$939,240	\$2,041,580	\$34,720	\$3,015,540	
		Plan and Forecast Cost Variance			\$89,000	\$0	\$89,000	\$0	\$0	\$89,000	
	Internal Labor	Plan Cost		\$20,000	\$520,120	\$2,269,307	\$2,809,427	\$3,379,893	\$26,640	\$6,215,960	
		Forecast Cost		\$0	\$0	\$2,269,307	\$2,269,307	\$3,379,893	\$26,640	\$5,675,840	
		Plan and Forecast Cost Variance		\$20,000	\$520,120	\$0	\$540,120	\$0	\$0	\$540,120	
	Totals	Plan Cost		\$20,000	\$609,120	\$3,208,547	\$3,837,667	\$5,421,473	\$61,360	\$9,320,500	
		Forecast Cost		\$0	\$0	\$3,208,547	\$3,208,547	\$5,421,473	\$61,360	\$8,691,380	
		Plan and Forecast Cost Variance		\$20,000	\$609,120	\$0	\$629,120	\$0	\$0	\$629,120	
⊖ Operating	External Labor	Plan Cost	\$24,192	\$156,950	\$277,772	\$996,228	\$1,455,142	\$1,563,932	\$201,472	\$3,220,546	
		Forecast Cost	\$0	\$0	\$0	\$996,228	\$996,228	\$1,563,932	\$201,472	\$2,761,632	
		Plan and Forecast Cost Variance	\$24,192	\$156,950	\$277,772	\$0	\$458,914	\$0	\$0	\$458,914	
	Internal Labor	Plan Cost	\$66,024	\$322,044	\$831,832	\$3,381,125	\$4,601,025	\$4,019,561	\$381,552	\$9,002,138	
		Forecast Cost	\$0	\$0	\$0	\$3,381,125	\$3,381,125	\$4,019,561	\$381,552	\$7,782,238	
		Plan and Forecast Cost Variance	\$66,024	\$322,044	\$831,832	\$0	\$1,219,900	\$0	\$0	\$1,219,900	
	License Costs	Plan Cost			\$55,000	\$150,000	\$205,000	\$150,000	\$10,000	\$365,000	
		Forecast Cost			\$0	\$150,000	\$150,000	\$150,000	\$10,000	\$310,000	
		Plan and Forecast Cost Variance			\$55,000	\$0	\$55,000	\$0	\$0	\$55,000	
	Totals	Plan Cost	\$90,216	\$478,994	\$1,164,604	\$4,527,353	\$6,261,167	\$5,733,493	\$593,024	\$12,587,684	
		Forecast Cost	\$0	\$0	\$0	\$4,527,353	\$4,527,353	\$5,733,493	\$593,024	\$10,853,870	
		Plan and Forecast Cost Variance	\$90,216	\$478,994	\$1,164,604	\$0	\$1,733,814	\$0	\$0	\$1,733,814	
	Totals	Totals	Plan Cost	\$90,216	\$498,994	\$1,773,724	\$7,735,900	\$10,098,834	\$11,154,966	\$654,384	\$21,908,184
			Forecast Cost	\$0	\$0	\$0	\$7,735,900	\$7,735,900	\$11,154,966	\$654,384	\$19,545,250
			Plan and Forecast Cost Variance	\$90,216	\$498,994	\$1,773,724	\$0	\$2,362,934	\$0	\$0	\$2,362,934

Create a Jaspersoft Ad Hoc View - Chart

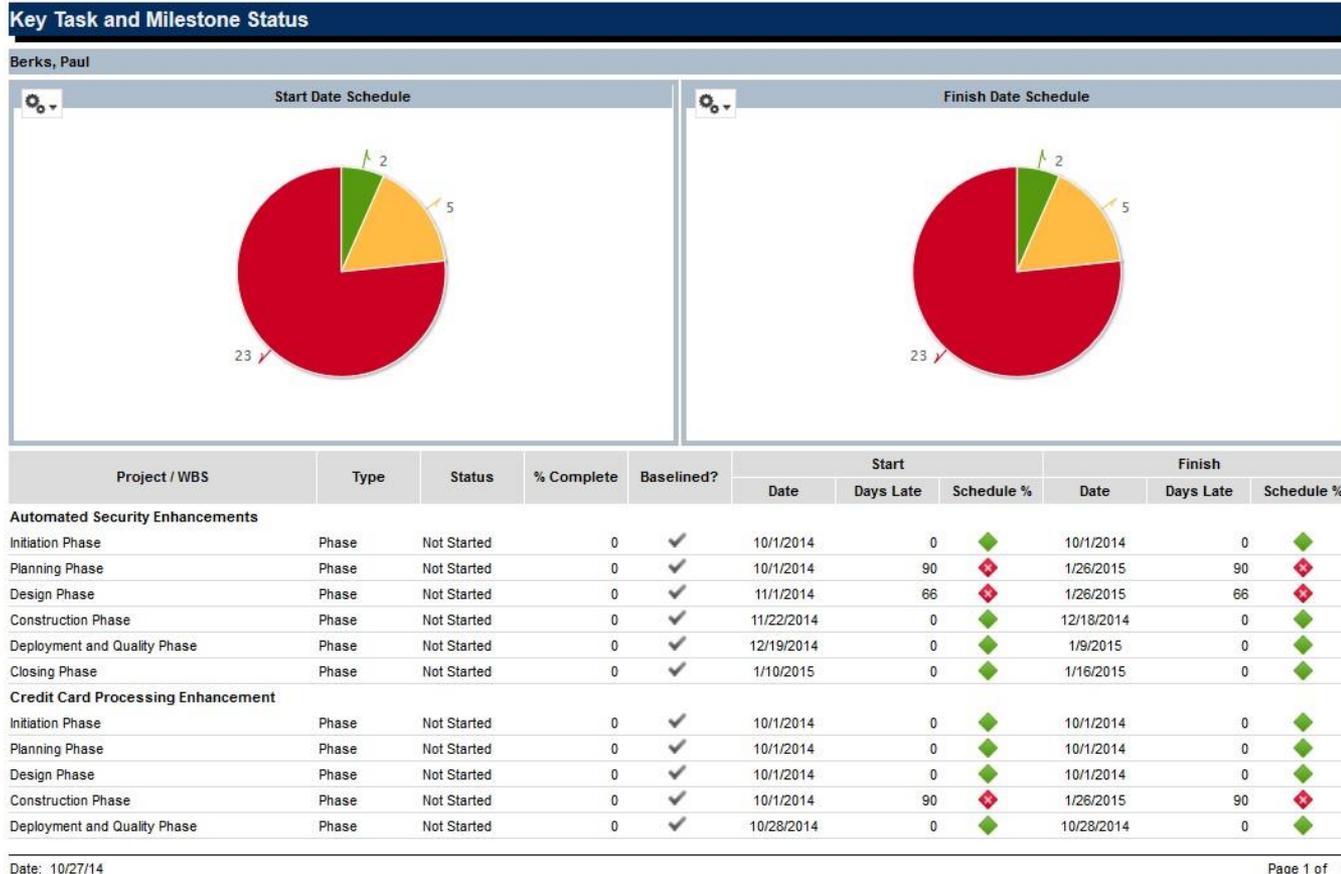


Jaspersoft Studio Reports - Overview

INTERACTIVE – EMAIL AND EXPORT REPORTS – SCHEDULE REPORTS – CASCADING FILTERS

- New Capabilities
 - Easy to use, interactive reports that run within CA PPM
 - Filter options and report results in the same window, with support for cascading filters
 - More scheduling options, can email reports, export reports (PowerPoint, PDF, Excel, Word, etc.), and output to server
 - Report and style templates can be created
 - Reports can be developed in CA PPM against either the data warehouse or the transactional database

Run a Jaspersoft Studio Report



ca **Intellicenter**

DEMO

Data Warehouse Overview

Subject Oriented

- Modeled on the STAR schema and includes the following master objects: Investment (All Types), Resource, Portfolio, and Timesheet

Integrated

- Consistent naming conventions, formats and encoding structures

Data Warehouse

Non Volatile

- Separate schema optimized for business decision making and analytics

Time Variant

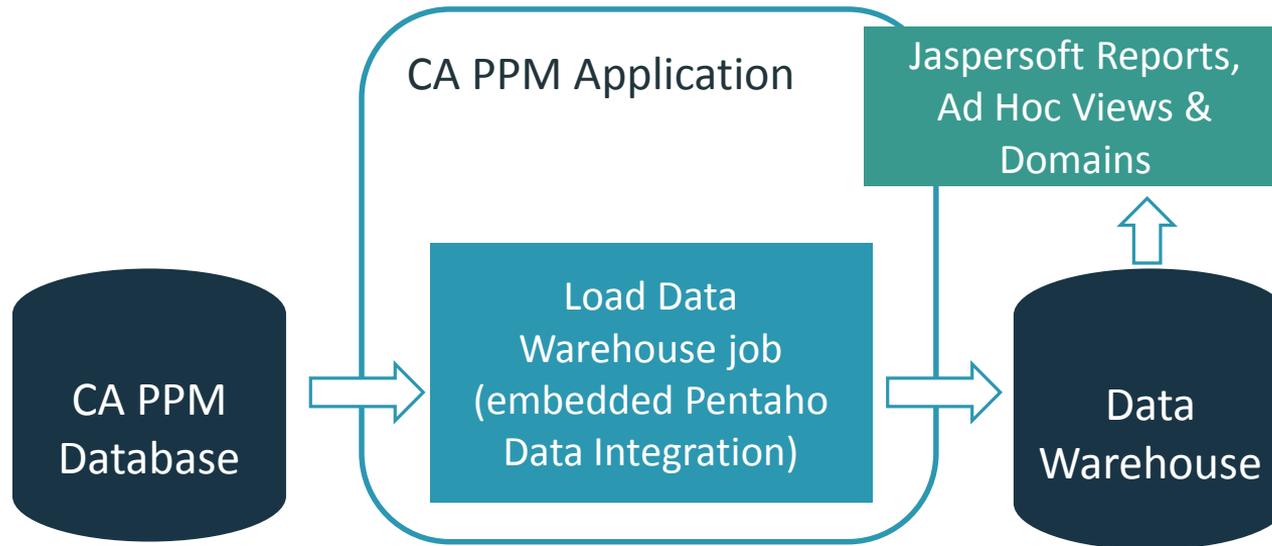
- Predefined, yet configurable, time slices
 - 1 year back/forward for weekly
 - 3 years back/forward for monthly

Data Warehouse Overview

Common Terms

- Dimensions are the descriptive fields on an object (Examples: Investment ID, Investment Name, Investment Manager, etc.).
- Facts are the metrics on an object (Examples: Total Cost, Actual Hours, etc.).
- Star Schema is a type of database design. A simple Star would have a fact table with a few direct links to dimension tables.
- A Snowflake is a dimension table that can be indirectly linked to a fact table.

CA PPM Reporting Architecture



- Pentaho Data Integrator is embedded within CA PPM. The data transformation and load runs as a CA PPM job.

- Lightweight, drag and drop business user reporting capability
- Out of the box reports and domains for Investments, Resources, Financials, and Timesheets.
- The Data Warehouse is modeled on a STAR schema, with Dimensions covering the major areas in CA PPM and their associated Facts.

Data Warehouse Overview

Addresses Reporting Challenges

- Reports and portlets run against transactional data
 - The data warehouse schema resides on another database server taking the stress off the transactional CA PPM database.
- Relational database makes queries very complex
 - The data warehouse carries keys and descriptive values in the dimension tables so fewer joins are required. Facts are combined into summary and period tables.
- Finding the data with 1000+ tables
 - With the exception of configuration and meta tables, the data warehouse tables are 'user friendly' to report against.
- Table name inconsistencies
 - Similar tables are grouped together by the table prefix and the names are very descriptive.

Data Warehouse Overview

Addresses Reporting Challenges

- Time slice requests
 - Specific time slice requests are set up to populate the data warehouse. Defaults are set but can be modified.
- Column naming
 - Columns are consistently named across tables.
- Resource ID versus user ID
 - In the CA PPM database, manager points to the user ID and resource points to the resource ID, or code, which makes it inconsistent. In the data warehouse, resource columns (manager_key, resource_key, etc.) are always the resource_key.
- Date/time storage
 - In the CA PPM database, the finish/end dates do not always match those displayed in CA PPM. Database functions in queries must be leveraged to determine the correct date. In the data warehouse, the finish/end dates always match CA PPM.

Loading the Data Warehouse

ETL Jobs

Reports and Jobs

- Load the Data Warehouse Security Privileges
 - Loads the investment / resource security for the system users
 - Separate job - the security job is not incremental, the table gets truncated and rebuilt

- Load the Data Warehouse
 - Loads the complete data warehouse
 - ETL job steps:
 - Runs scripts the data warehouse is dependent upon: calendar population, WBS hierarchy, investment hierarchy
 - Builds the meta data that determines the data warehouse structure
 - Checks/corrects any data warehouse structure changes
 - Loads/updates the lookup tables
 - Loads/updates the dimension tables
 - Loads/updates the fact tables

Data Warehouse Table Prefix Standards

- DWH_CFG - Configuration tables used to supply the data warehouse log and audit information
- DWH_CMN - Common database objects used across most areas
- DWH_CMP - Company database objects
- DWH_FIN - Financial management database objects
- DWH_INV - Investment management database objects
- DWH_LKP - Lookup database objects
- DWH_META - Meta data tables that help determine the data warehouse structure
- DWH_ODF - Custom database objects
- DWH_PFM - Portfolio management database objects
- DWH_RES - Resource management database objects
- DWH_RIM - Risk, issue and change management database objects
- DWH_TME - Time management database objects
- DWH_X - Internal database objects used to help populate the fact tables

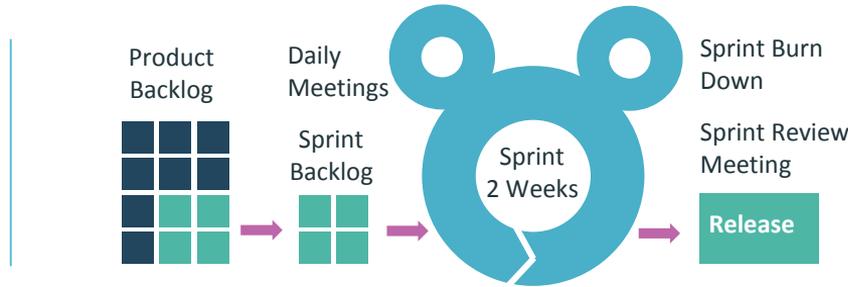
CA PPM Enables SAFe

The biggest challenge for our customers today:

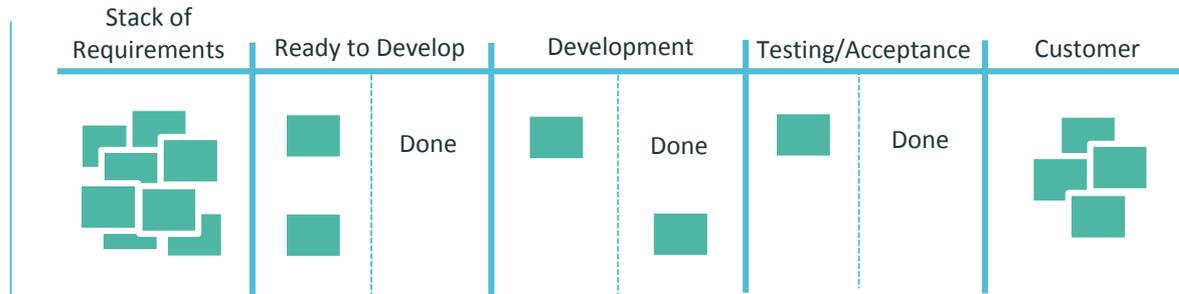


Agile 101: Multiple Approaches/Methodologies

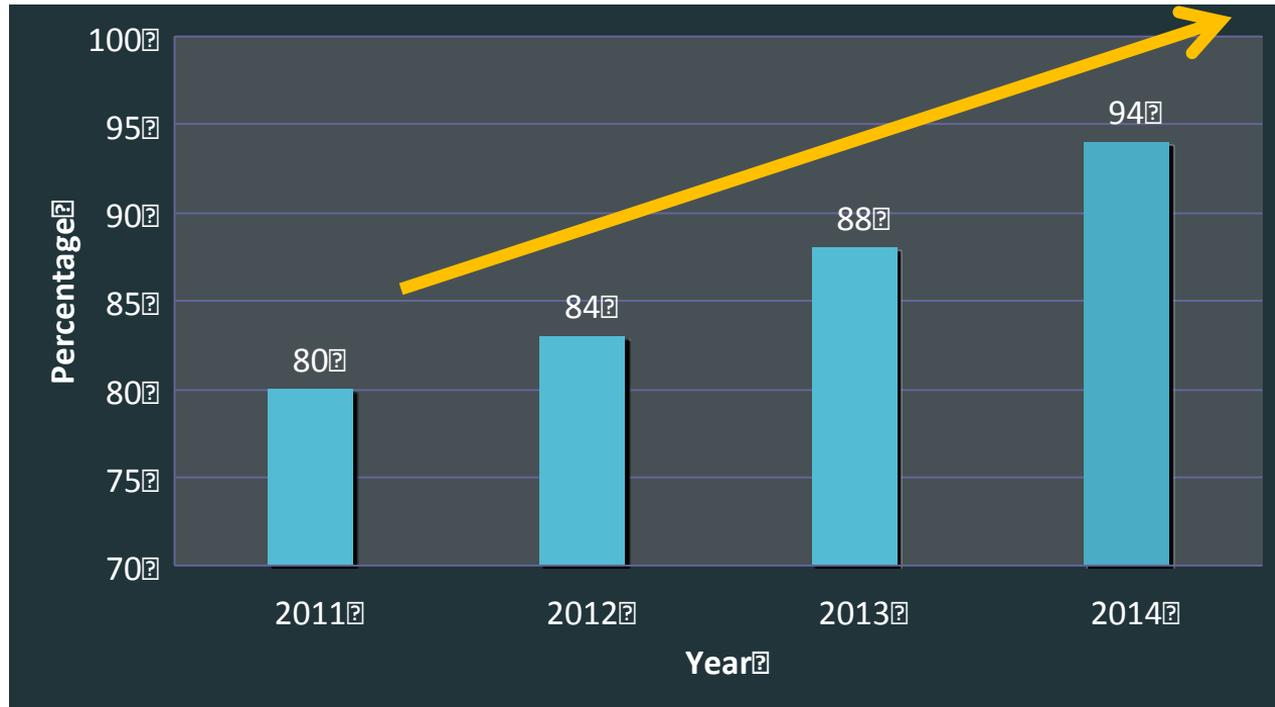
SCRUM



KANBAN



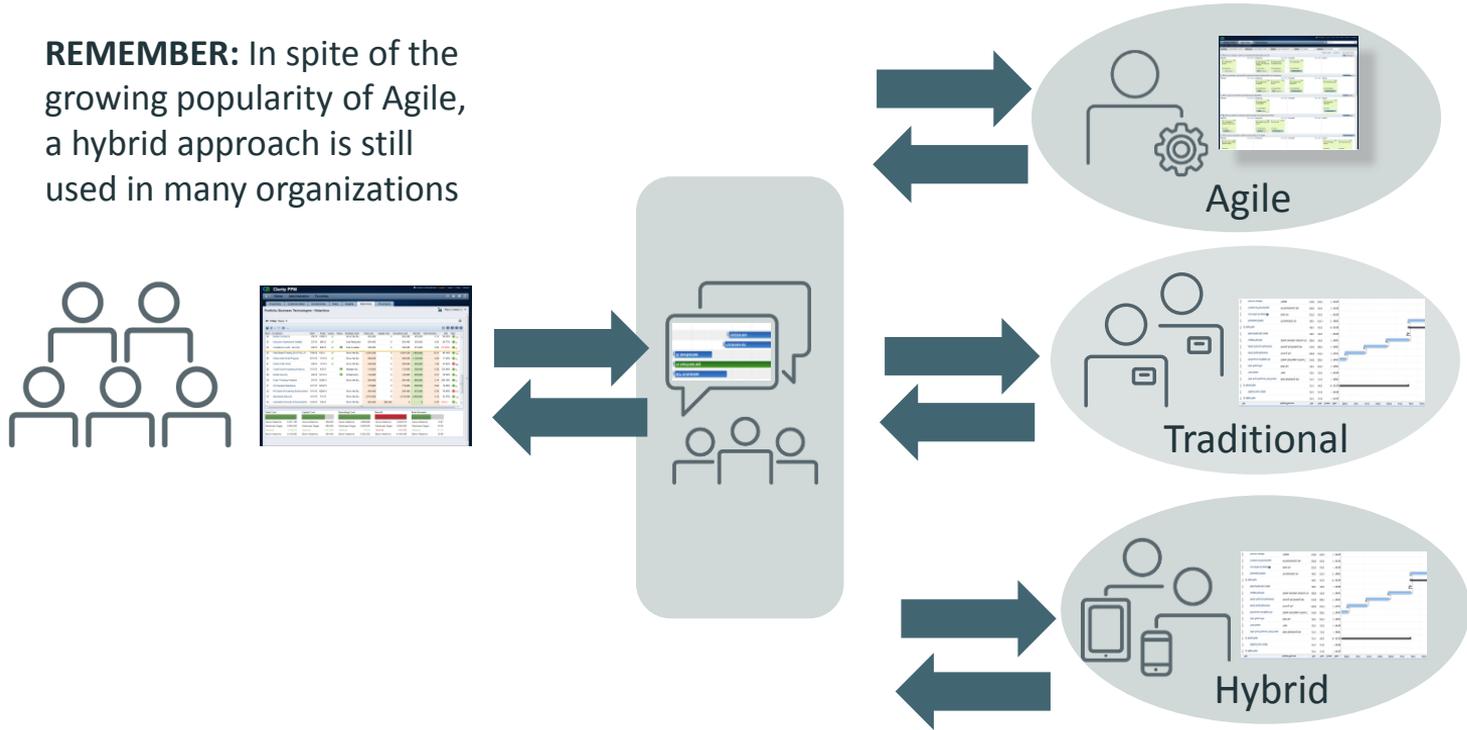
Percentage of Organizations Practicing Agile by Year



From the VersionOne 9th Annual State of Agile™ Survey. www.stateofagile.com. All rights reserved © 2015

Organizations are Heterogeneous

REMEMBER: In spite of the growing popularity of Agile, a hybrid approach is still used in many organizations

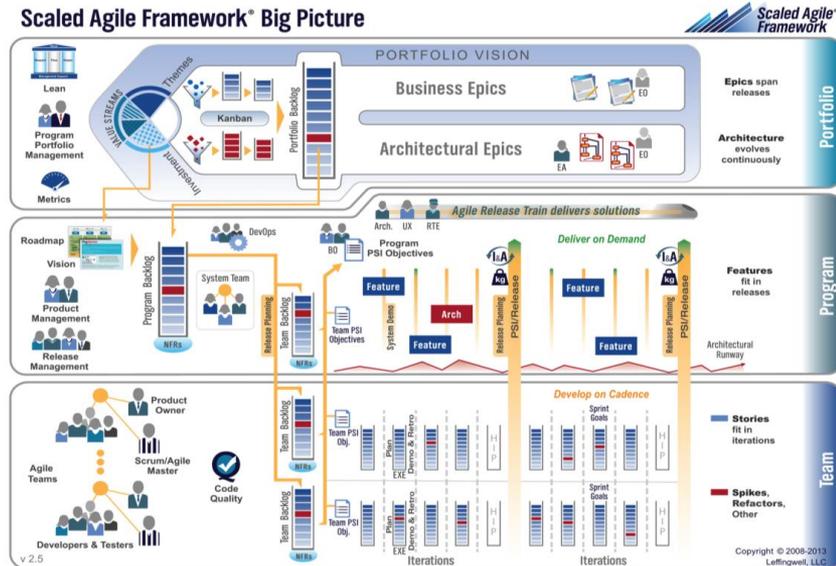


Product Focused Frameworks



The Scaled Agile Framework® (SAFe)

The Scaled Agile Framework is a proven, public-facing framework for applying Lean and Agile practices at enterprise scale



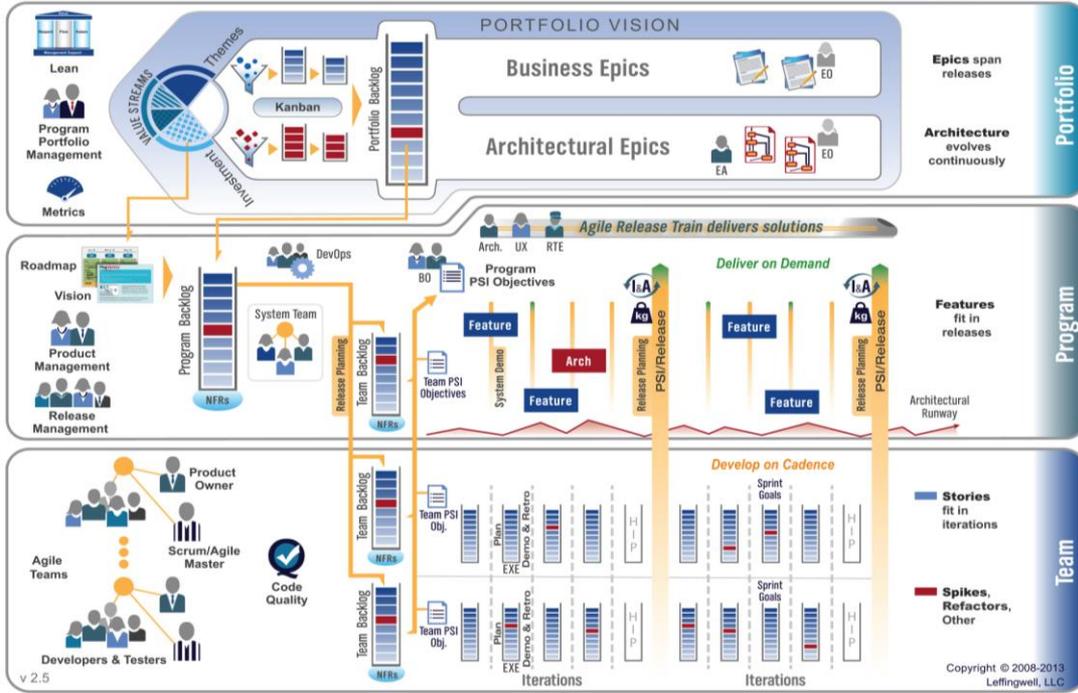
- Synchronize alignment, collaboration and delivery
- Well-defined in books and now on the Web
- Scales successfully to large numbers of practitioners and teams

Core Values:

1. Code Quality
2. Program Execution
3. Alignment
4. Transparency

SAFe Promotes Alignment

Scaled Agile Framework® Big Picture



CA PPM Enables SAFe

CA PPM – Product-Focused Planning

Top Tier Funding Allocation



Operational

Traditional Hybrid Agile

“Own the Planning”

- Enhanced product planning
- Determine and optimize what to bring to market
- Resource and financial planning

“Own the Outcomes”

- Enable the business to see when features can be brought to market
- Visibility into overall product health

“Own the Money”

- Financial engine
- Budgeting and True Cost Management
- Project and Program Management and funding

“Capture the Work”

- Integration to traditional tools: MS Project, Open Workbench
- Integration to ALM tools: Rally, V1, JIRA, TFS, RTC

EXISTING CUSTOMERS



Protect the base

- 12,000 users today
- Using V1
- Going to a fully agile model
- Not sure of how PPM fits in



Hung for new opportunities

- 1,200 Current Users
- Embracing Agile
- Needs governance and transparency

NEW OPPORTUNITIES



Leveraging SAFe as an advantage

- 400,000 (PNCV)
- Agile initiatives
- Building an Agile Center of Excellence

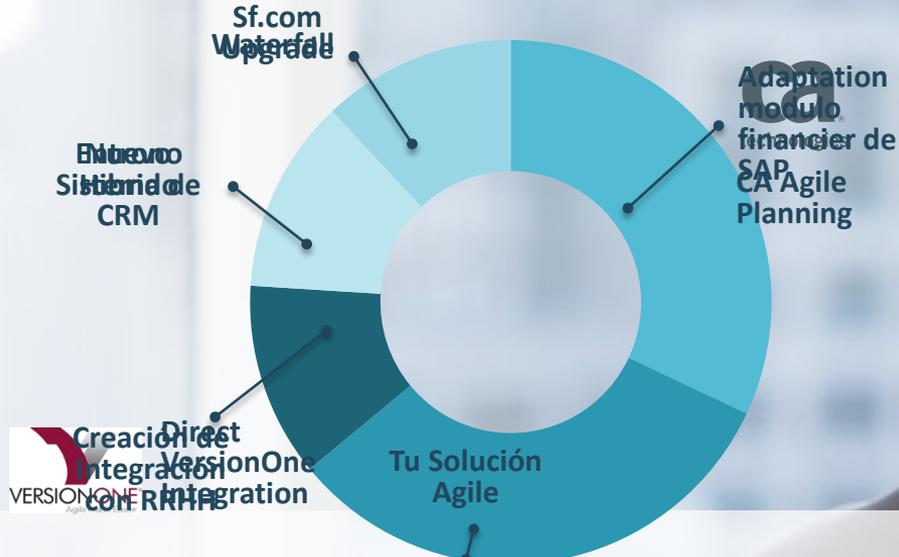


Leveraging SAFe as a door opener

- 13,000 Users
- Currently using HP PPM
- Looking at implementing SAFe

Visibilidad completa del Portfolio

CA PPM PORTFOLIO



VERSION ONE
SOFTWARE



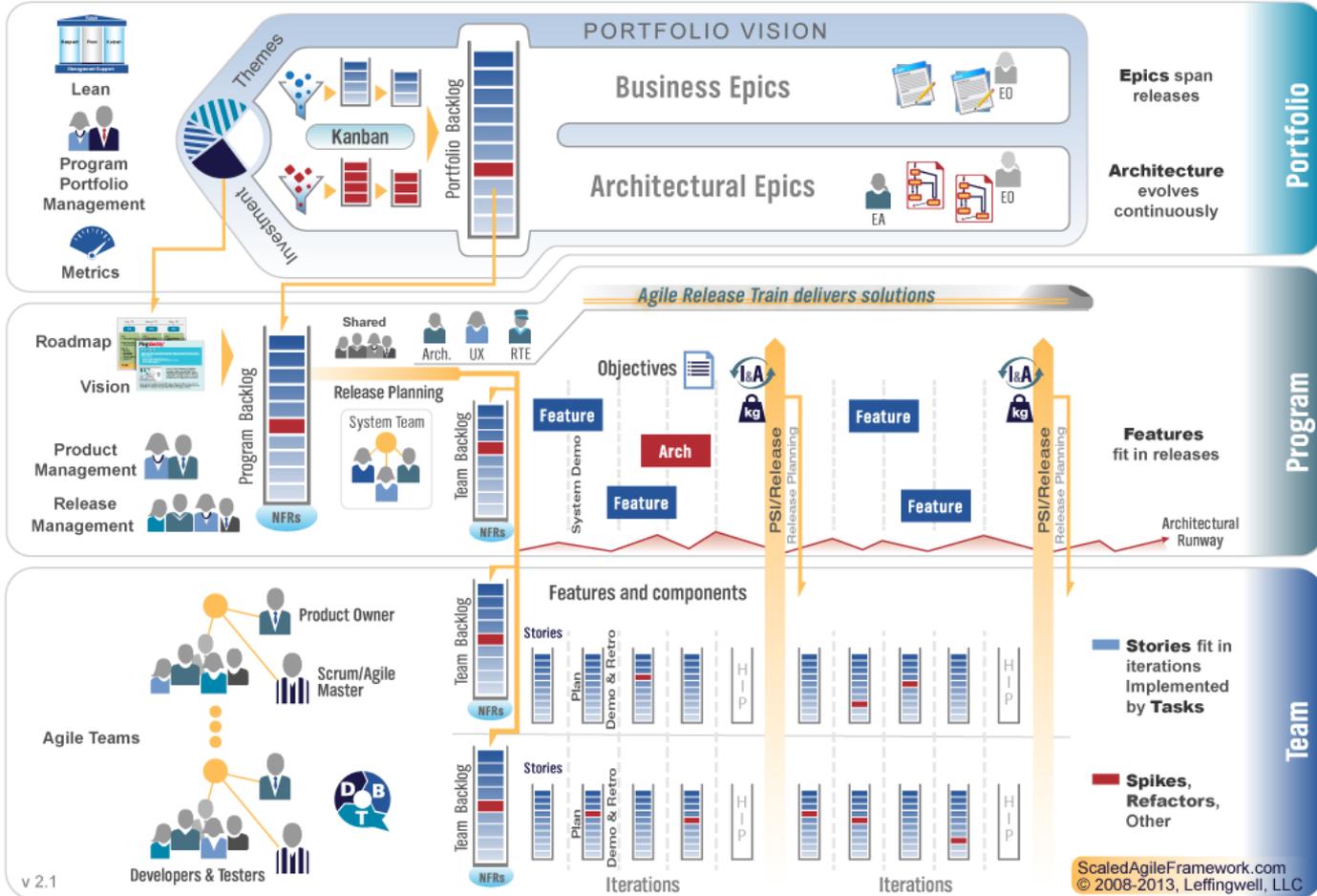
THE AGILE
PROJECT INSIGHT
YOU NEED

AGILE TOOLS ROLL
UP SEAMLESSLY
INTO CA PPM

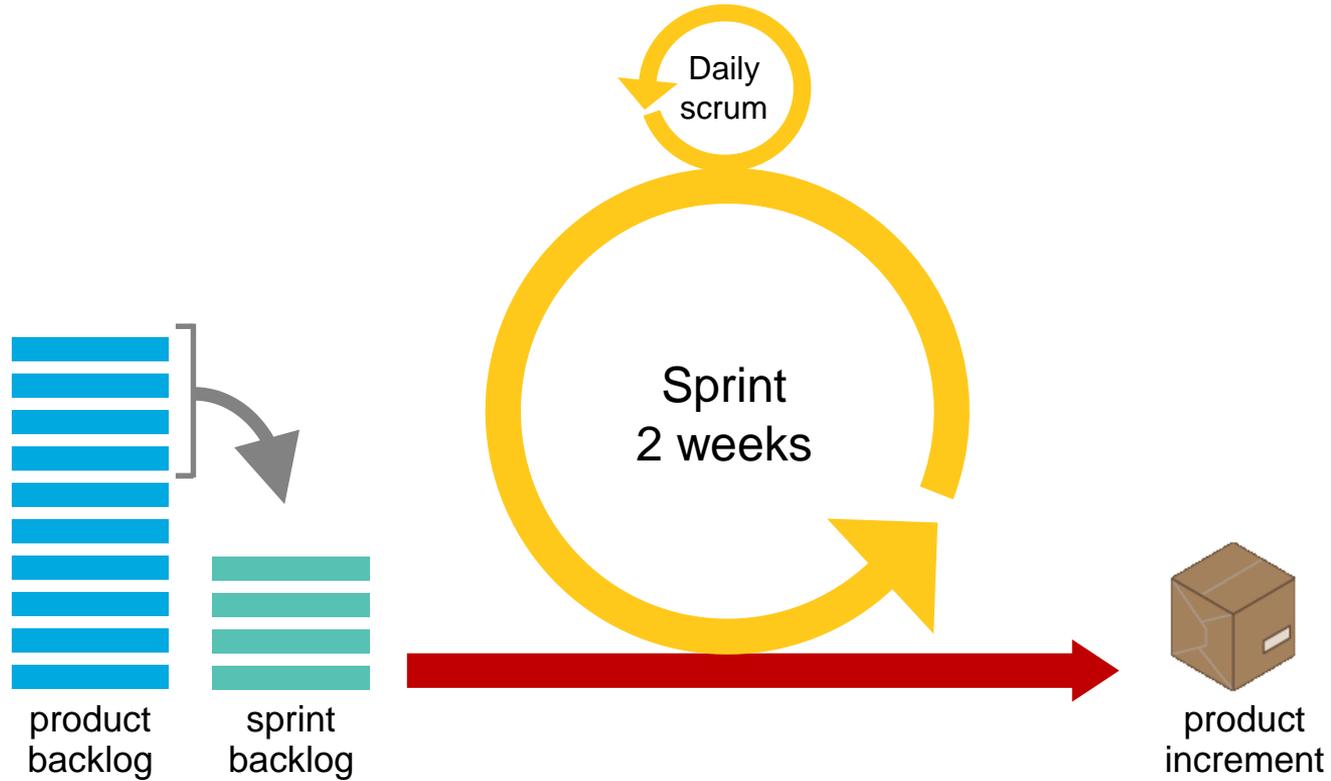


Rally : Acquisition Agreement

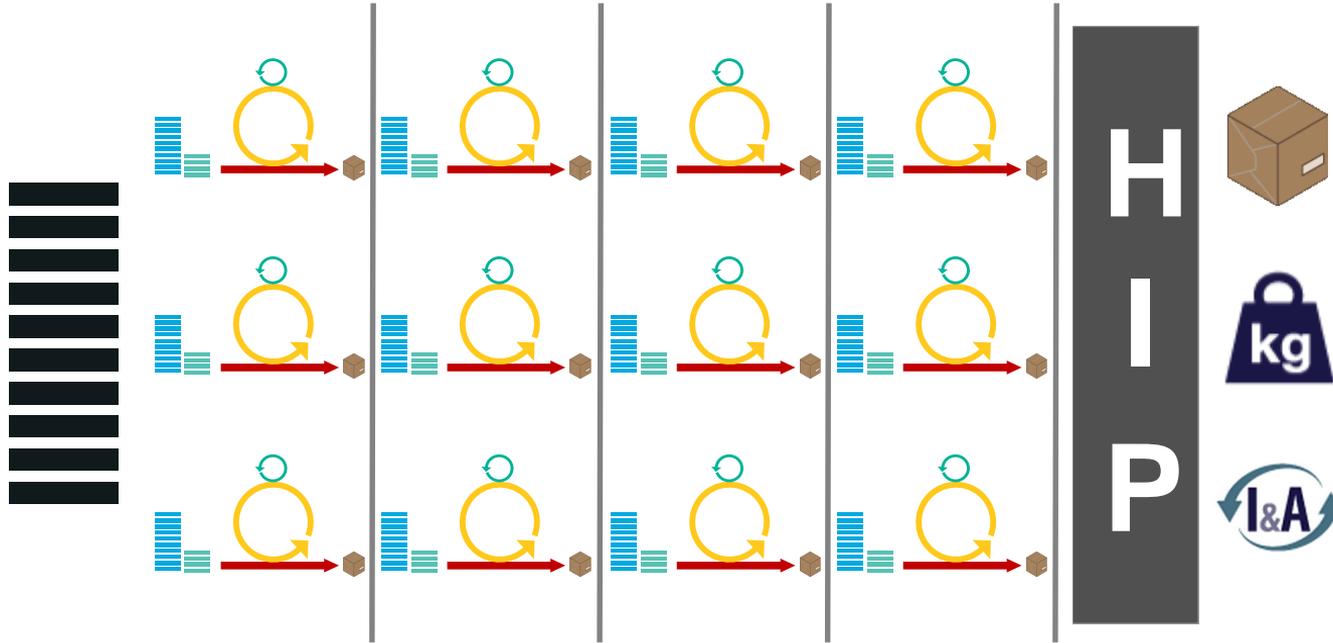
Scaled Agile Framework™ Big Picture



2 Weeks



10 Weeks



Based on Leffingwell LLC and Scaled Agile Inc.



RALLY'S AGILE PROJECT MANAGEMENT SOLUTION

My Dashboard

Ready to Accept

ID	Name	Schedule State
There is nothing ready to accept.		

Blocked Work

569 Purchase Your Items
Blocked Jul 12 by Paul

Recent Activity

569 Purchase Your Items
Jul 12 by Dudley, Shopping Team
it's back up
Reply

569 Purchase Your Items
Jul 12 by Sara, Shopping Team
I've contacted the vendor and they indicated it will be back up by 1:00p EST.
Reply

569 Purchase Your Items
Jul 12 by Paul, Shopping Team
credit card validation service has been down since ~9:30a PDT. I'm unable to begin manual testing
Reply

Iteration Burndown

Iteration Summary

Iteration:

1 Day Remaining in a 10 day Iteration
2012-07-05 - 2012-07-16

Committed

73% Accepted (11 of 15 Points)
Try to accept work well before the end of the iteration. [Learn More](#)

3 Active Defects
We recommend addressing defects before considering a story "done". [Learn More](#)

63% Tests Passing (7 of 11)
All tests should be passing before the iteration ends. [Learn More](#)

Edit iteration...



User Stories

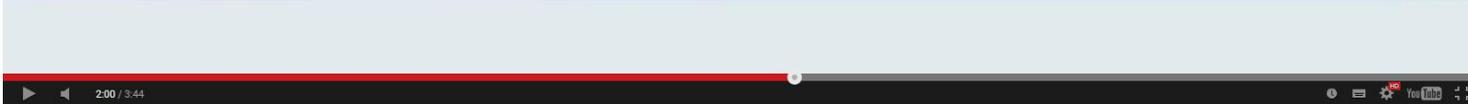
Views: Default
 Sorted By Rank Ascending

All	Rank	ID	Name	Release	Iteration	State	Plan Est	Task Est	To Do	Owner	Project
<input type="checkbox"/>		S15	Epic: Shipping				12.0	35.0	8.0	Paul	Consumer Site
<input type="checkbox"/>		S16	Epic: Payment Methods				8.0	35.0	11.0	Paul	Consumer Site
<input type="checkbox"/>		S36	Payment - Promotional Codes	Release 2 (5.6.7)	Iteration 6 (R2)		2.0	12.0	6.0	Bera	Payment Team
<input type="checkbox"/>		S37	Payment - Gift Certificates	Release 2 (5.6.7)	Iteration 6 (R2)		2.0	9.0	5.0	Paul	Payment Team
<input type="checkbox"/>		S59	Payment - Supported Credit Cards	Release 1 (1.2.3.4)	Iteration 3 (R1)		4.0	14.0	0.0	Tom	Shopping Team
<input type="checkbox"/>		S17	Epic: Order Management				6.0	0.0	0.0	Paul	Consumer Site
<input type="checkbox"/>		S81	Combine Orders				3.0	0.0	0.0	Tom	Shopping Team
<input type="checkbox"/>		S83	Order Modification				3.0	0.0	0.0	Tara	Shopping Team
<input type="checkbox"/>		S18	Epic: Performance and Scalability				24.0	30.0	8.0	Paul	Consumer Site
<input type="checkbox"/>		S63	Website must be available 24x7	Release 2 (5.6.7)	Iteration 5 (R2)		3.0	9.0	0.0	Tara	Shopping Team
<input type="checkbox"/>		S64	Move to Oracle	Release 2 (5.6.7)	Iteration 5 (R2)		3.0	9.0	0.0	Tara	Shopping Team
<input type="checkbox"/>		S65	System should support 10,000 concurrent users				17.0	8.0	8.0	Tara	Shopping Team
<input type="checkbox"/>		S66	Move Server Room	Release 2 (5.6.7)	Iteration 5 (R2)		1.0	4.0	0.0	Tara	Shopping Team
<input type="checkbox"/>		S28	Support backorder email notification				3.0	0.0	0.0	Paul	Fulfillment Team
<input type="checkbox"/>		S32	Combine multiple items into single purchase order				1.0	0.0	0.0	Paul	Fulfillment Team
<input type="checkbox"/>		S44	Log unsuccessful payment attempts.				20.0	0.0	0.0	Paul	Payment Team
<input type="checkbox"/>		S48	Install new 2048bit encryption key				3.0	0.0	0.0	Paul	Payment Team
<input type="checkbox"/>		S54	Spike: Purchase your items	Release 1 (1.2.3.4)	Iteration 2 (R1)		2.0	8.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S57	Check the Status of Your Order	Release 1 (1.2.3.4)	Iteration 2 (R1)		3.0	7.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S60	Create Deployment Scripts	Release 1 (1.2.3.4)	Iteration 4 (R1)		3.0	10.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S61	Mauna Loa Hardening	Release 1 (1.2.3.4)	Iteration 4 (R1)		4.0	11.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S62	Resolve Performance Issues	Release 1 (1.2.3.4)	Iteration 4 (R1)		2.0	5.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S67	Patch #1 - Mauna Loa	Release 2 (5.6.7)	Iteration 5 (R2)		2.0	4.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S71	Spike: Cancel the Order	Release 2 (5.6.7)	Iteration 6 (R2)		1.0	3.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S73	Search for Items	Release 2 (5.6.7)	Iteration 7 (R2)		3.0	0.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S74	Demo Support	Release 2 (5.6.7)	Iteration 7 (R2)		1.0	0.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S77	Spike: Tax calculations	Release 2 (5.6.7)	Iteration 7 (R2)		1.0	0.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S80	Change Method of Payment				3.0	0.0	0.0	Paul	Shopping Team
<input type="checkbox"/>		S49	Add error message if credit card number length is < 16				1.0	0.0	0.0	Dave D	Payment Team

21 through 40 of 43

Display 20

Backlog
 Defined
 In-Progress
 Completed
 Accepted
 Blocked



Shopping Team

My Home Plan **Track** Quality Reports Search

Iteration Defect Status

Iteration 6 (R2)
07-05
1 Day Remaining
07-18
Found
Active
Closed

■ ■ ■ ■ ■
6 5 1

All	Rank	ID	Name	State	Priority
<input type="checkbox"/>		DE27	Promo Code field label formatting is incorrect	B D P C A	4 - Low
<input type="checkbox"/>		DE24	State drop down doesn't contain any items	B D P C A	2 - High Attention
<input type="checkbox"/>		S72	Validate Customer Contact/Shipping info	B D P C A	P1: 0, P2: 0
<input type="checkbox"/>		DE22	Recurring 'No Address' Warning	Fixed	3 - Normal
<input type="checkbox"/>		S71	Spike: Cancel the Order	B D P C A	No defects
<input type="checkbox"/>		S70	Persistent Shopping Cart	B D P C A	No defects
<input type="checkbox"/>		S69	Purchase Your Items	B D P C A	P1: 0, P2: 1
<input type="checkbox"/>		DE26	(Auto) Fitness Test Failed for GUI - Checkout Button	Open	2 - High Attention
<input type="checkbox"/>		DE21	Only one selected item is being added to the cart	Fixed	3 - Normal
<input type="checkbox"/>		S68	Recent Purchases View	B D P C A	No defects
<input type="checkbox"/>		S83	Order Modification	B D P C A	No defects

B Backlog D Defined P In-Progress C Completed A Accepted ● Blocked

8 Items

 Display: 20



Portfolio Timeline

Zoom Type Theme



Legend Complete Planned Late At Risk On Track

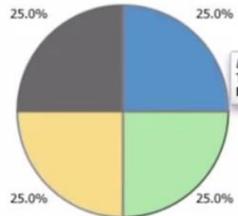


Portfolio Alignments SHARED

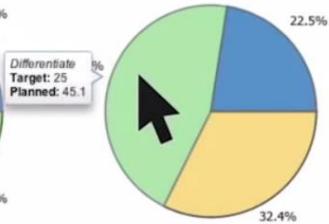
Portfolio Alignments

Type: Initiative Differentiate Optimize None Neutralize Not Done

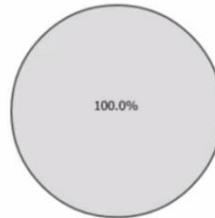
Target



Planned



Actual



Business Case (3/4)	Prioritize (2/6)	Build (4/3)	Measure (1/10)	Archive (0/∞)
<p>PI14 No Owner</p> <p>Integrate into Facebook</p> <p>13 days in this column</p>	<p>PI3 Jackie</p> <p>Integrate in-store and online experience (future)</p> <p>13 days in this column</p>	<p>PI17 Jackie</p> <p>Minimal online shopping site</p> <p>15%</p> <p>9 days in this column</p>	<p>PI2 Jackie</p> <p>Personalized online shopping experience</p> <p>13 days in this column</p>	
<p>PI13 No Owner</p> <p>Build read-write API for handling orders</p> <p>13 days in this column</p>	<p>PI19 Jackie</p> <p>Integrate social into shopping experience</p> <p>13 days in this column</p>	<p>PI10 Jackie</p> <p>Create a read-only API</p> <p>9 days in this column</p>		
<p>PI12 No Owner</p> <p>Re-build primary web app to use API</p> <p>13 days in this column</p>		<p>PI18 Jackie</p> <p>Modernize customer service portal</p> <p>100%</p> <p>13 days in this column</p>		
		<p>PI27 Jackie</p> <p>Maintain legacy purchasing system</p> <p>33%</p> <p>13 days in this column</p>		

Scrum

is to *team*

as

SAFe

is to *enterprise*

Spain & Portugal

CA Clarity User Group Meeting

- CA Technologies

Wednesday, June 17, 2015