

# Guiding Your Best Path to PPM, ITSM & Governance

CA Clarity PPM™ V13 Differences Course  
Including  
Open Workbench v2  
& Microsoft® Project 2010

## **Presenter:**

Allan Mills, MPM, PMP, Solutions Architect, Digital Celerity

[www.digitalcelerity.com](http://www.digitalcelerity.com)  
Thursday, March 15, 2012

CA Clarity PPM  
Global User Community



## Instructor Allan Mills, MPM, PMP

CA Clarity PPM  
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## Allan Mills, MPM, PMP Bio

- As senior member of Digital Celerity's global CA Clarity PPM Practice, Allan works with senior executives and PMO professionals to architect and implement, Project Portfolio Management (PPM) solutions leveraging CA Clarity PPM and best practices. He is a Clarity PPM Certified expert on all PPM business processes and core modules including Project Management, Resource Management, Portfolio Management, Crystal Reporting and Studio. As clients consistently reference, Allan is a highly-experienced practitioner of Microsoft Project and Open Workbench, as well as the integration and expert training of those tools with CA Clarity PPM. His delighted clients include Perdue Farms Inc., Independence Blue Cross, BNP Paribas, CareFirst Blue Cross Blue Shield, ERIE Insurance, and Economical Insurance where Allan delivered expert consulting and training services.
- Allan has been an active volunteer in the Project Management Institute for many years and was recently appointed to the Board of Directors for the Project Management Institute – Education Foundation.



## Course Curriculum

- **CA Clarity PPM v13 Differences Overview**
  - Access Applications Menu
  - Navigate the Application
  - Configure the Favorites Menu
  - Edit Data Using InLine Editing
  - Use Auto-suggest to Select Values for Fields
  - Object Sub-menu
  - Page Button Changes
  - Interactive Gantt
  - Assign Resources to Tasks from the Resource Pool
  - Task Assignment View
- **Open Workbench v2 Differences**
- **MS Project 2010 Differences**





The image shows a login interface for CA Clarity™ PPM. It features a dark blue header with the CA logo and the text 'CA Clarity™ PPM'. Below this is a light gray login box with a 'Login' heading. Inside the box are two input fields: 'Username' and 'Password'. A blue 'Login' button is positioned at the bottom right of the login box. At the bottom of the dark blue header, the copyright notice 'Copyright © 2011 CA. All rights reserved' is displayed.

**CA Clarity™ PPM**

**Login**

**Username**

**Password**

**Login**

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# CA Clarity™ PPM V13 Differences

Clarity version 13  
Login Page

## Access Applications Menu

Clarity version 12  
Login Page

CA Clarity™ PPM

User Name

Password

Login



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CA Clarity™ PPM

Login

Username

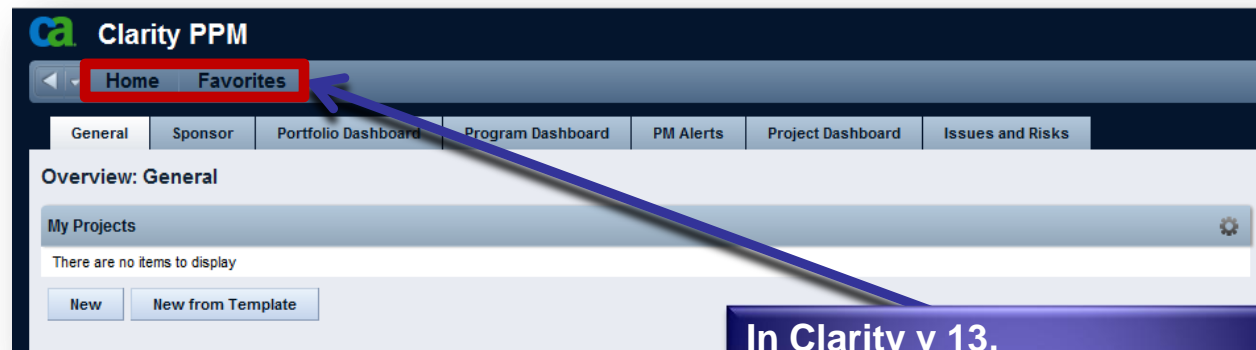
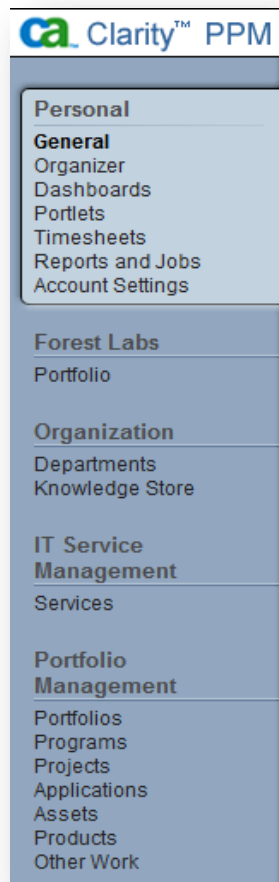
Password

Login

Copyright © 2011 CA. All rights reserved

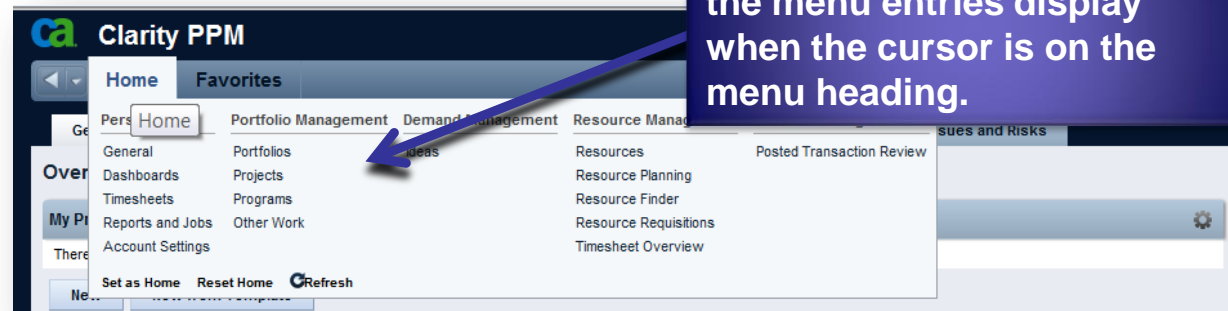


## Access Applications Menu



In previous versions of Clarity the application menu displays on the left pane of Clarity.

In Clarity v 13, when the application menu is not in use, the menu headings are all that you see.



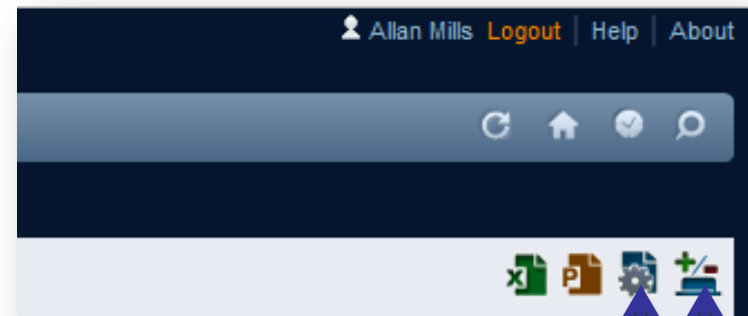
In Clarity v 13, the menu entries display when the cursor is on the menu heading.

## Navigate the Application

In previous versions of Clarity, the title bar includes several icons with links.



In Clarity Release 13, the title bar includes basic links.



In Clarity Release 13, the tool bar and portlets include User icons.

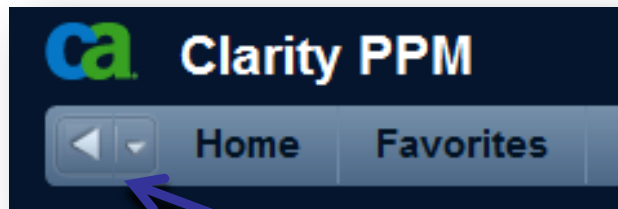
In Clarity Release 13, the Personalize option is a User icon.

In Clarity Release 13, the Manage Tabs option is a User icon.

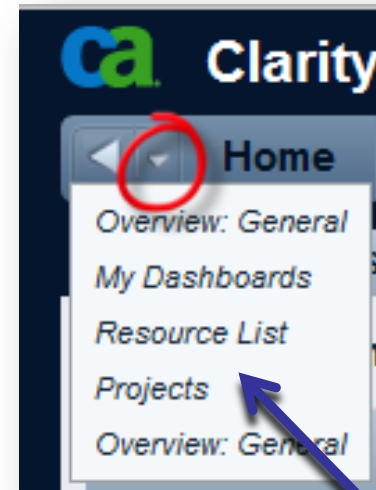


## Navigate the Application

- Back button and Recent button (*New in Clarity Release 13*)



In Clarity v 13,  
the Back button takes you to  
the previous page.



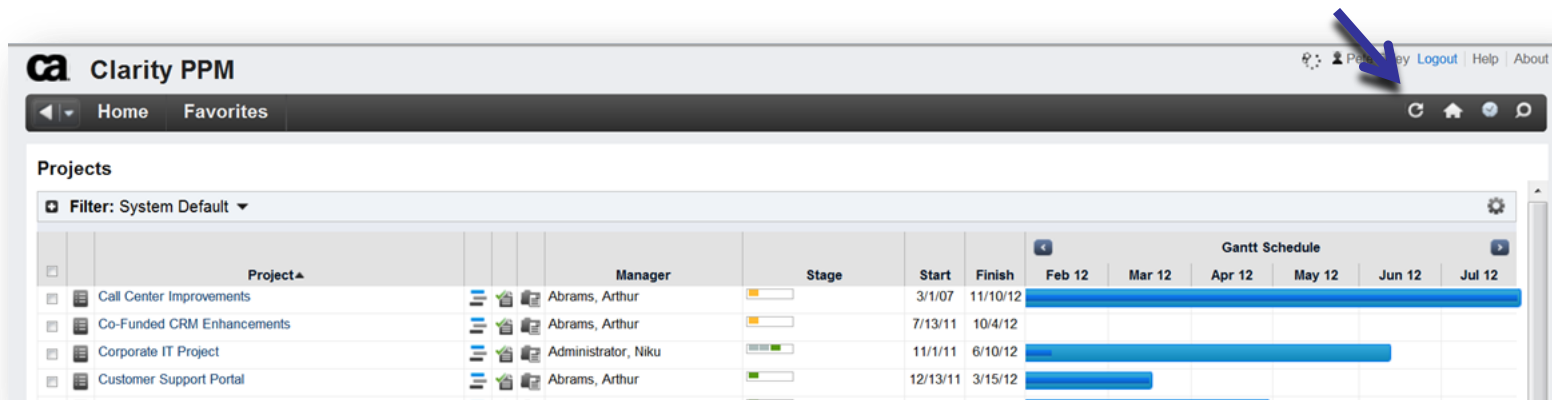
In Clarity v 13,  
the Recent button lists the  
previous pages you have  
accessed during this session.  
You can click on the link to  
return to the page.

## Navigate the Application

- The **Filter** option has changed from Collapse/Expand to the + option and is on the left side.

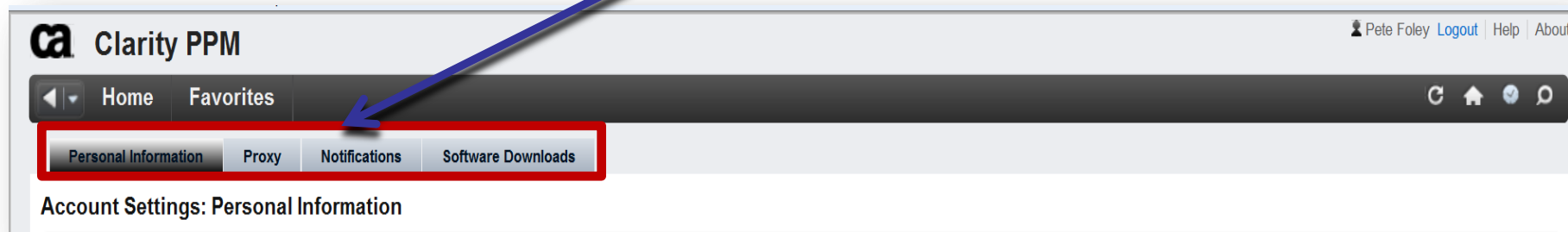


- The **Actions** dropdown option is now an **Options** icon on the right.
- The progress indicator is displayed as a rotating circle on the upper right side of the page.

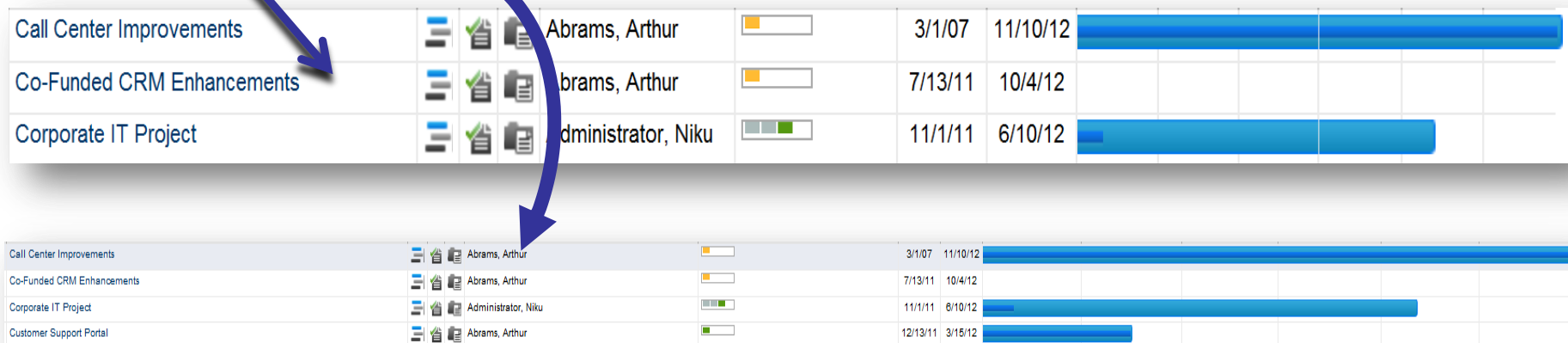


## Navigate the Application

- The **Font Settings** option has been removed from the **Action Settings** page.



- Use **CTRL +** or **CTRL -** to increase or shrink the Font size.

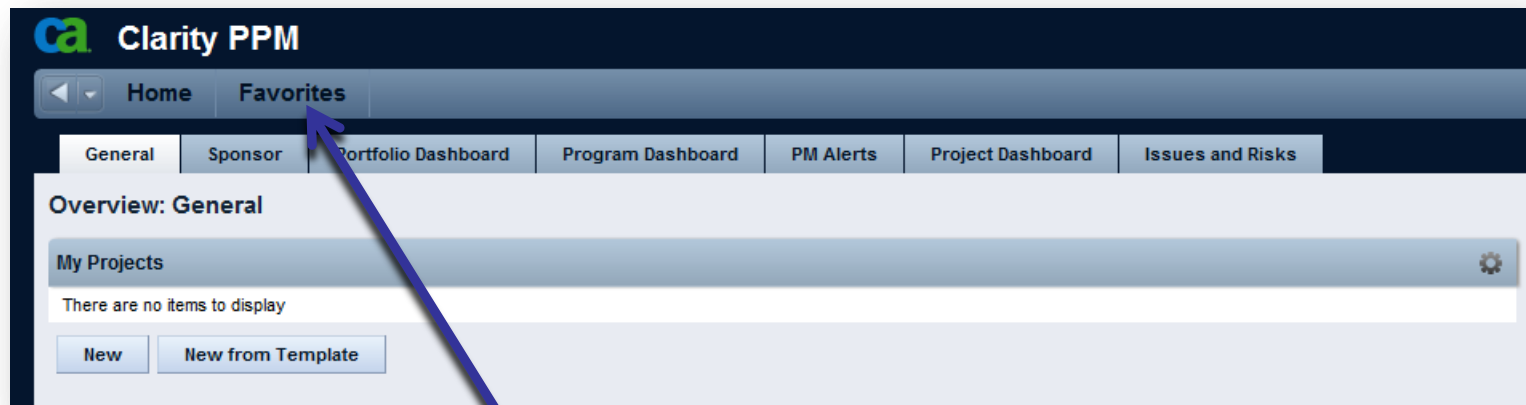


Call Center Improvements			Abrams, Arthur		3/1/07	11/10/12	
Co-Funded CRM Enhancements			Abrams, Arthur		7/13/11	10/4/12	
Corporate IT Project			Administrator, Niku		11/1/11	6/10/12	

Call Center Improvements			Abrams, Arthur		3/1/07	11/10/12	
Co-Funded CRM Enhancements			Abrams, Arthur		7/13/11	10/4/12	
Corporate IT Project			Administrator, Niku		11/1/11	6/10/12	
Customer Support Portal			Abrams, Arthur		12/13/11	3/15/12	

## Configure the Favorites Menu



In Clarity v 13,

- Add links to pages you access regularly
- Organize the entries into sections
- Create links for actions such as:
  - Create a project
  - Run a report

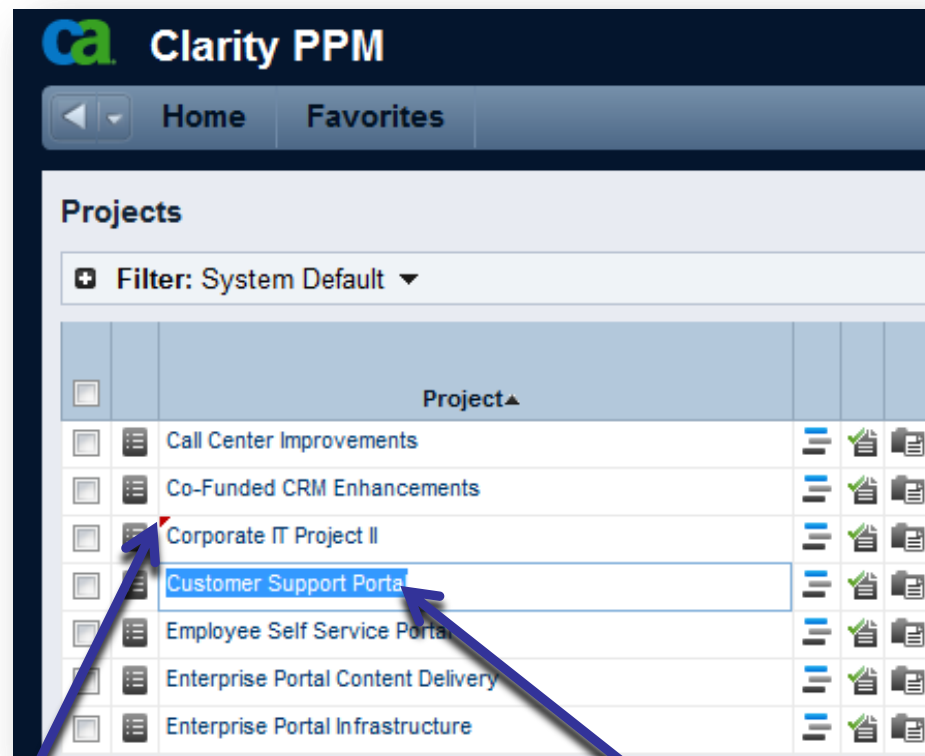
## Configure the Favorites Menu



In Clarity v 13,

- **Add Current:** Add a link to the current page (not available for all pages)
- **Configure:** Manage the menu items and sections
- **Refresh:** Updates the favorites menu to reflect configuration changes

## Edit Data Using InLine Editing

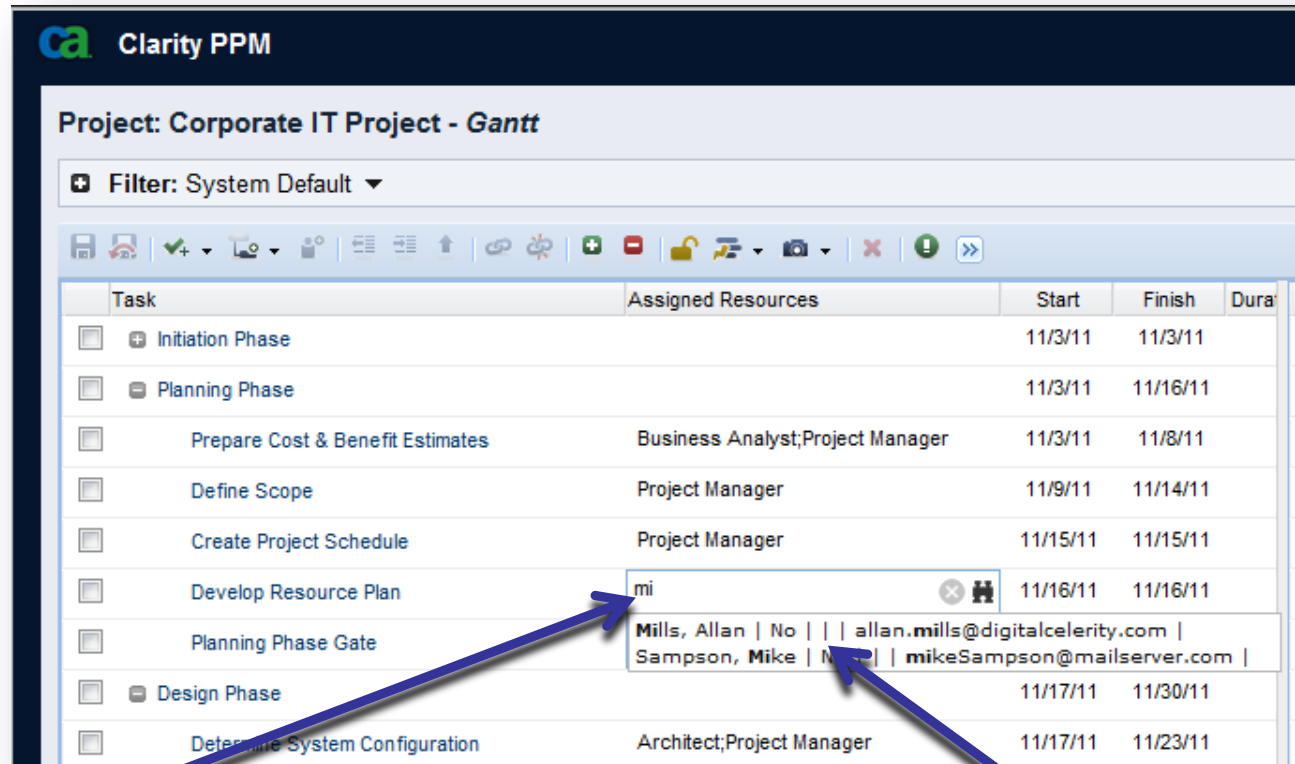


If a field has been updated but the save button has not been clicked, the Unsaved edit indicator is displayed.

Click on a field to enable InLine editing.



## Use Auto-suggest to Select Values for Fields



The screenshot shows the CA Clarity PPM interface for a project named "Corporate IT Project - Gantt". The "Filter" is set to "System Default". A table lists tasks and their assigned resources. The "Develop Resource Plan" task is selected, and the "Assigned Resources" field is open, showing a dropdown menu with a filtered list of resources. Two blue arrows point from the callout boxes to the input field and the dropdown list.

Task	Assigned Resources	Start	Finish	Duration
Initiation Phase		11/3/11	11/3/11	
Planning Phase		11/3/11	11/16/11	
Prepare Cost & Benefit Estimates	Business Analyst;Project Manager	11/3/11	11/8/11	
Define Scope	Project Manager	11/9/11	11/14/11	
Create Project Schedule	Project Manager	11/15/11	11/15/11	
Develop Resource Plan	mi	11/16/11	11/16/11	
Planning Phase Gate				
Design Phase		11/17/11	11/30/11	
Determine System Configuration	Architect;Project Manager	11/17/11	11/23/11	

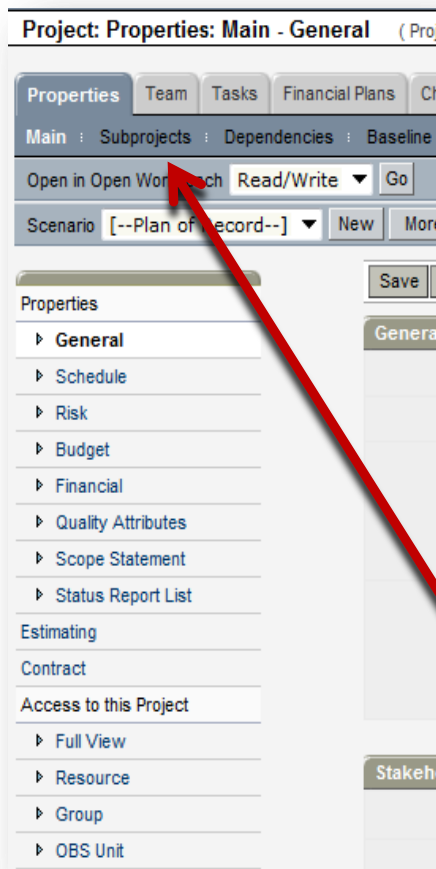
Filtered list of values:

- Mills, Allan | No | | allan.mills@digitalcelernity.com |
- Sampson, Mike | No | | mikeSampson@mailserver.com |

Type the first few letters of the value you are looking for.

A filtered list of values that include the entered letters is displayed.

## Object Subtabs Changes

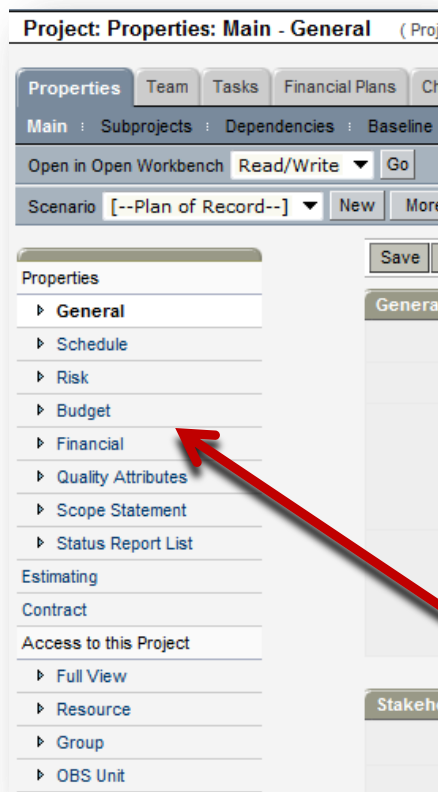


In Clarity v 13, Object Properties Main submenus are only visible when the cursor is on the menu heading and under the section called "Main".



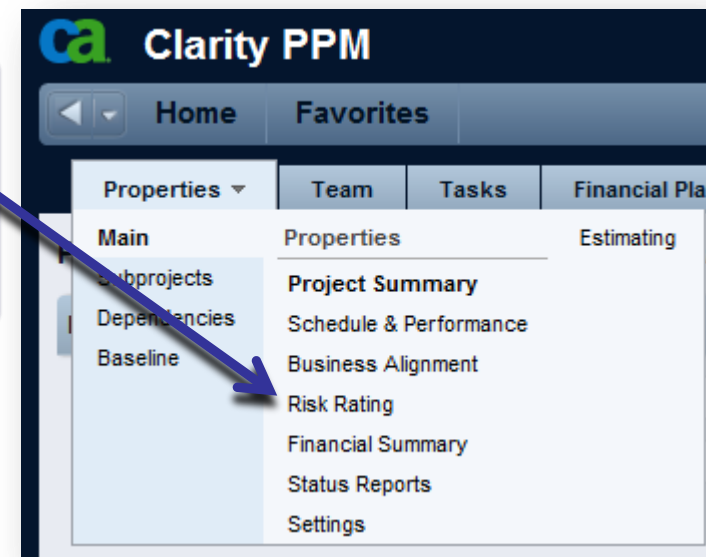
In previous versions of Clarity, Object Properties Main subtabs are always visible and on the top page.

## Object Subpage Changes

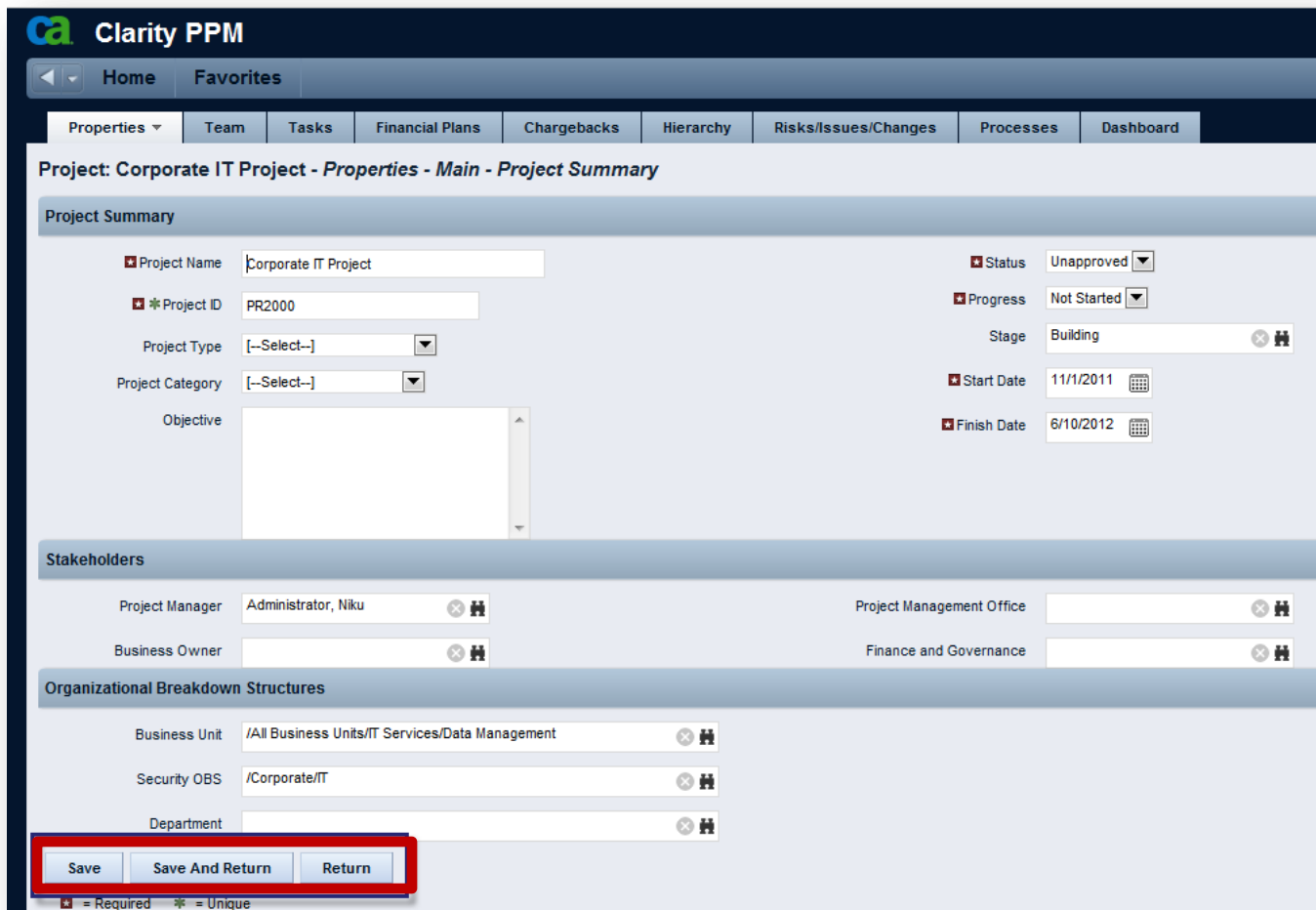


In Clarity Release 13, Object submenus are only visible when the cursor is on the menu heading and all submenus are in a dropdown list.

In previous versions of Clarity, Object sub pages list are always visible and on the top and left of the page.



## Action Button Name Changes



CA Clarity PPM

Home Favorites

Properties Team Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Processes Dashboard

Project: Corporate IT Project - Properties - Main - Project Summary

Project Summary

Project Name Corporate IT Project

Project ID PR2000

Project Type [--Select--]

Project Category [--Select--]

Objective

Status Unapproved

Progress Not Started

Stage Building

Start Date 11/1/2011

Finish Date 6/10/2012

Stakeholders

Project Manager Administrator, Niku

Business Owner

Project Management Office

Finance and Governance

Organizational Breakdown Structures

Business Unit /All Business Units/IT Services/Data Management

Security OBS /Corporate/IT

Department

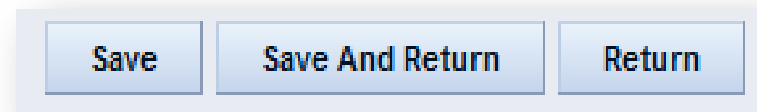
Save Save And Return Return

= Required \* = Unique

## Action Button Name Changes



In previous versions of Clarity,  
the three action buttons on a page are:  
Save – Saves the record and stays on the  
page  
Submit – Saves the record and moves back to  
the previous page  
Cancel – Returns to the previous page

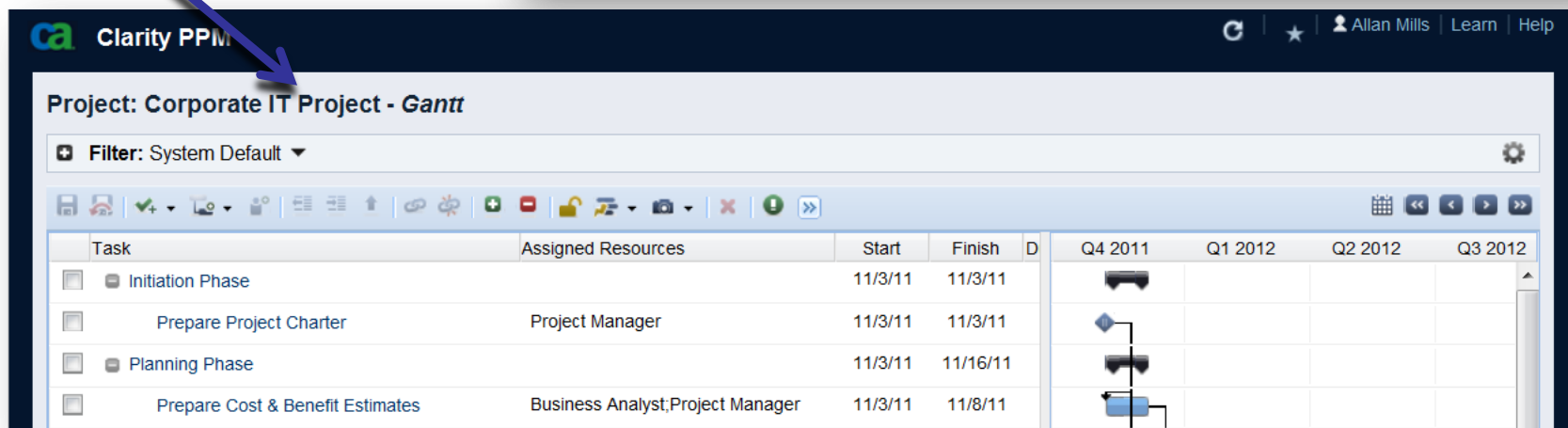
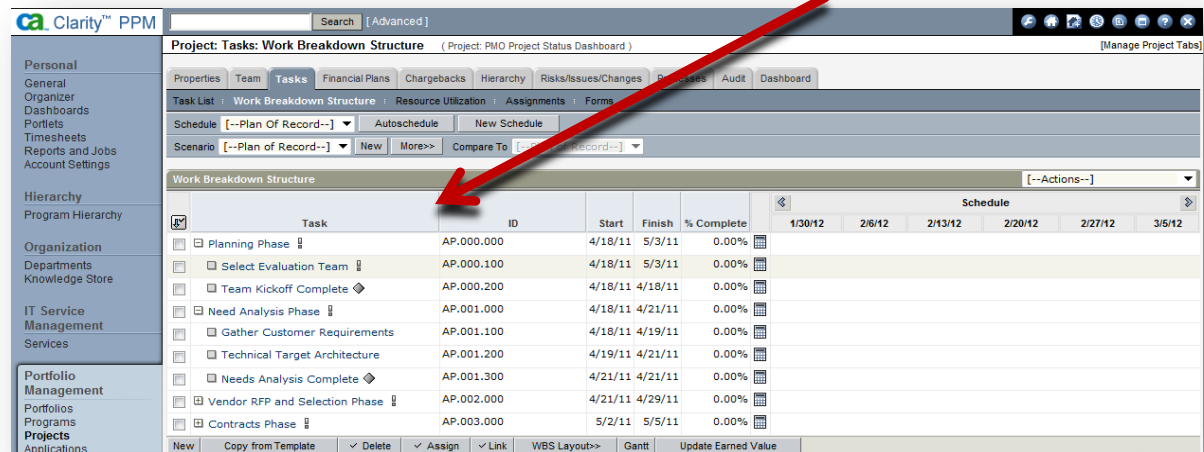


In Clarity v 13,  
the three action buttons on a page are:  
Save – Saves the record and stays on the  
page  
Save and Return - Saves the record and  
moves back to the previous page  
Return – Returns to the previous page

## Interactive Gantt Chart

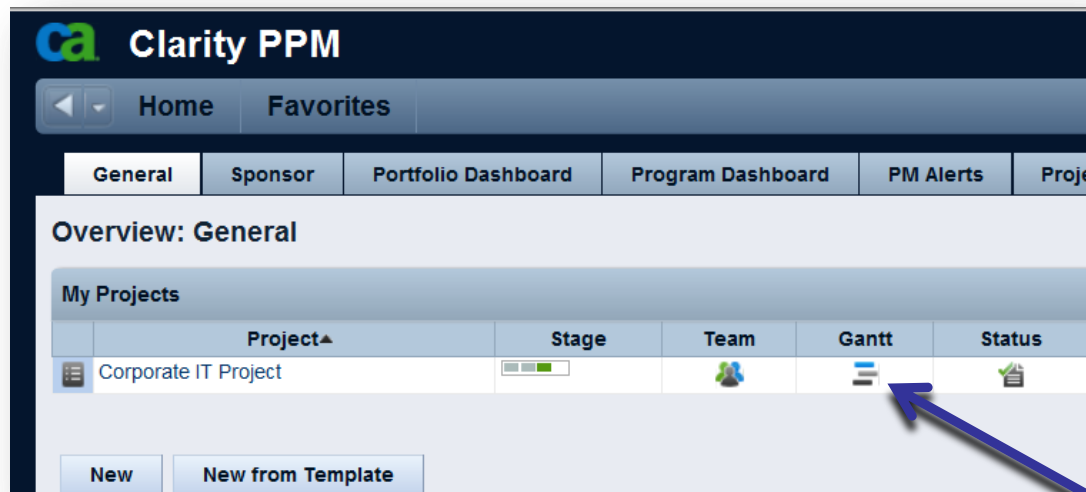
In previous versions of Clarity, Task / Work Breakdown Structure pages are used for reviewing the schedule.

in Clarity v 13, an Interactive Gantt replaces the Task / Work Breakdown Structure pages.





## Interactive Gantt Chart

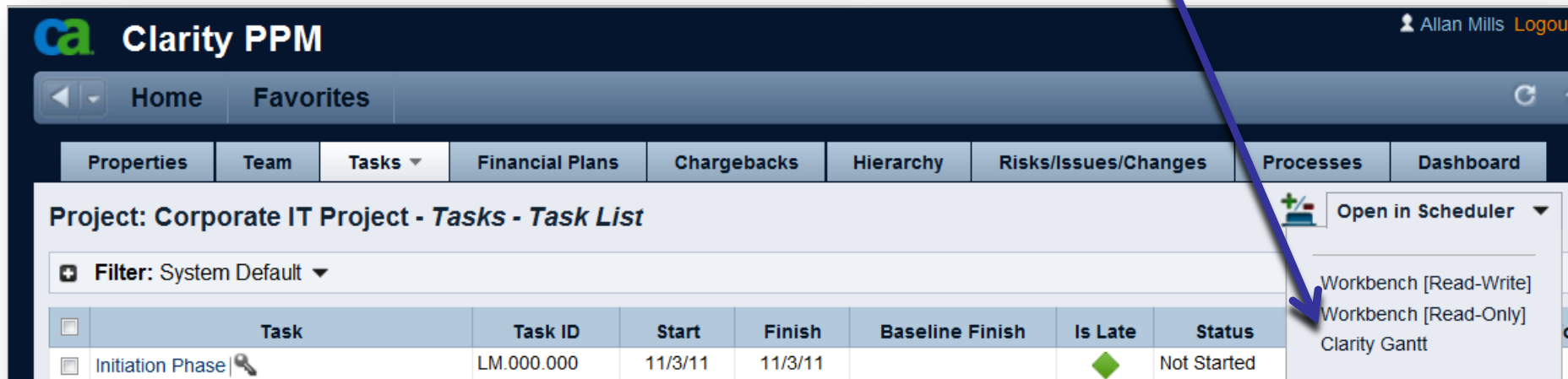
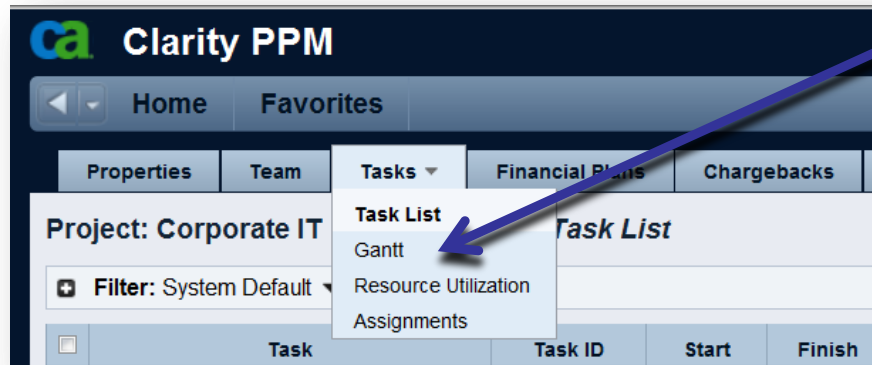


Clicking the Gantt Icon in the My Projects portlet or on the Projects List page opens the Interactive Gantt in a pop-up window.

## Interactive Gantt Chart

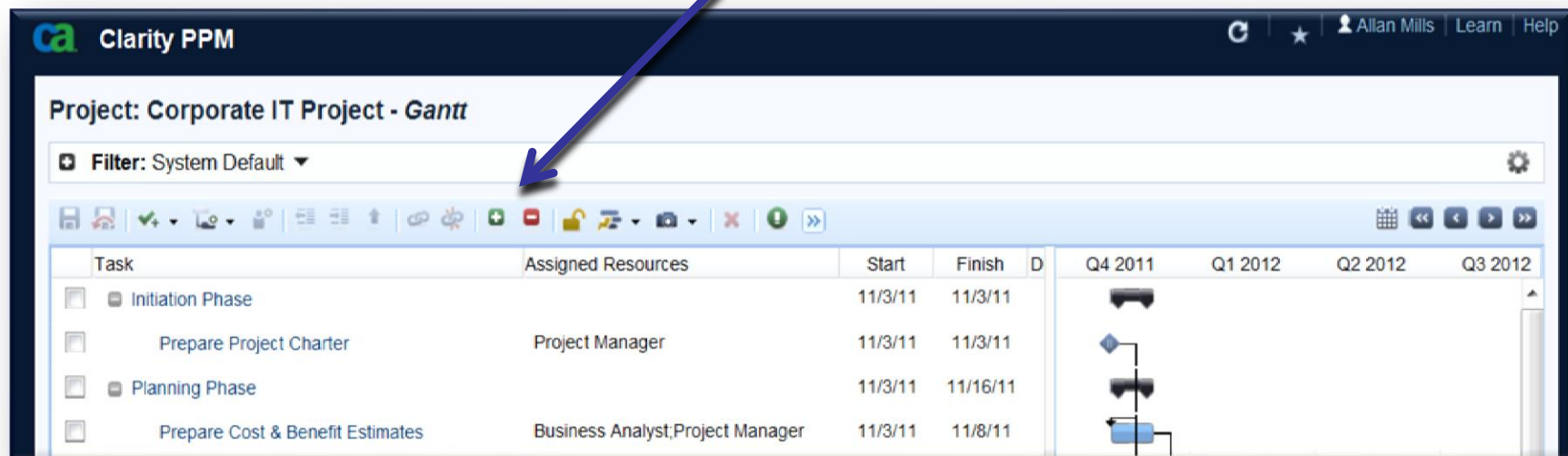
Clicking the Gantt Link in the Project / Tasks tab opens the Interactive Gantt in a pop-up window.

Clicking the Clarity Gantt link in the Projects Open in Scheduler dropdown opens the Interactive Gantt in a pop-up window.



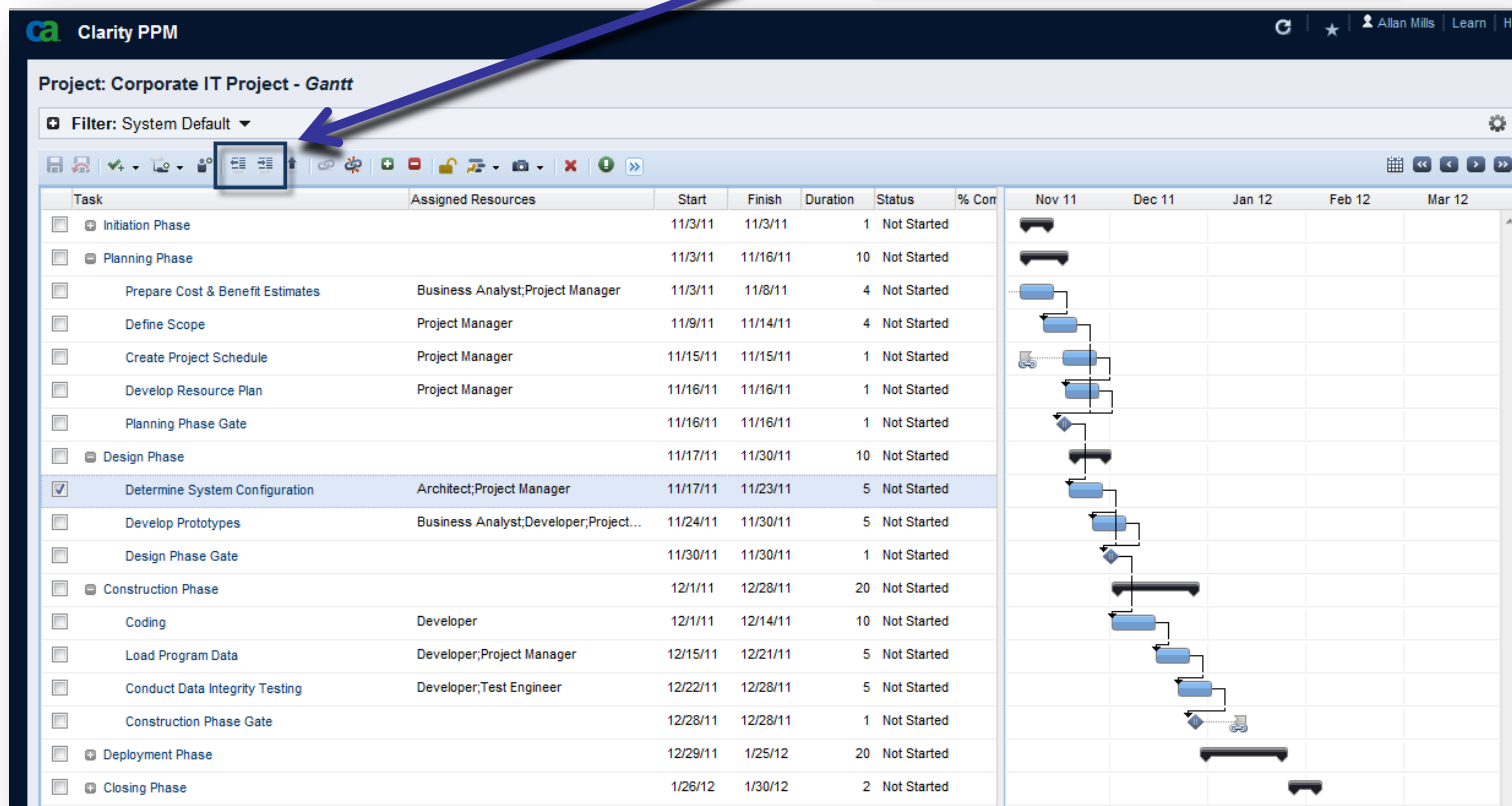
## Interactive Gantt Chart

The Interactive Gantt has a toolbar for easy access to functionality.



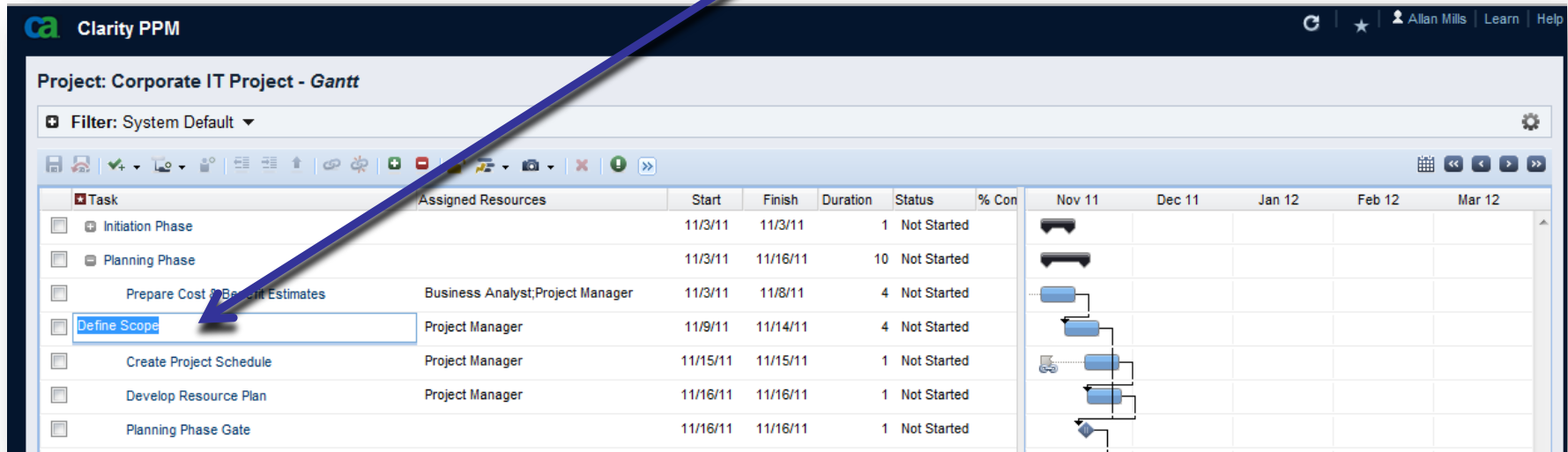
## Interactive Gantt Chart

The Task Hierarchy can be adjusted using the toolbar (indent or outdent tasks).



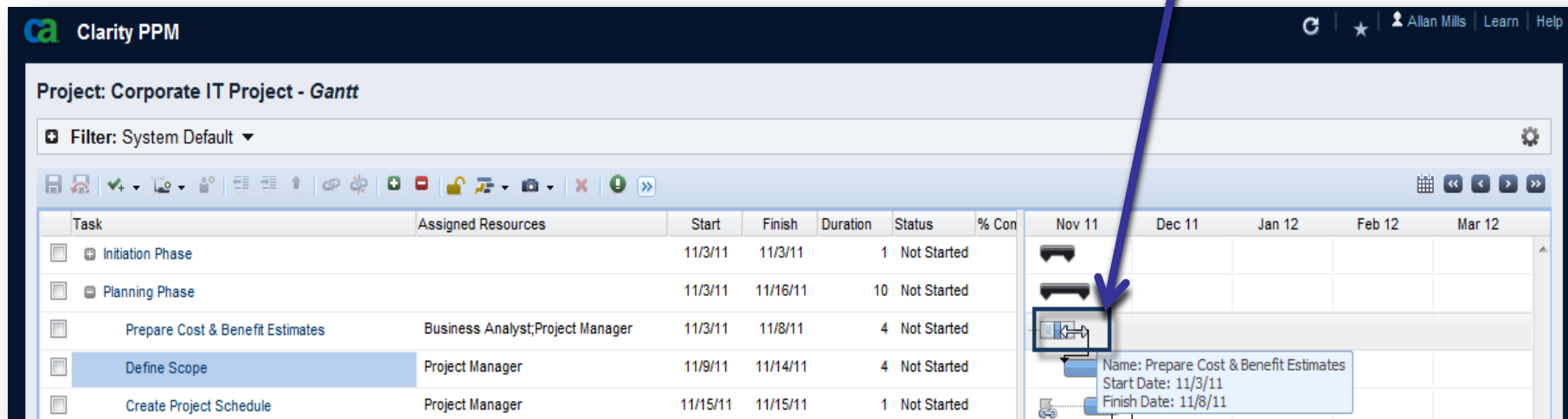
## Interactive Gantt Chart

InLine Edit is available on the Gantt chart fields.



## Interactive Gantt Chart

Drag and Drop enables changing tasks dates or creating dependencies between tasks.





## Assign Resources to Tasks from the Resource Pool

Clarity PPM

Project: Corporate IT Project - Gantt

Filter: System Default

Task	Assigned Resources	Start	Finish	Dur...	Sta
Initiation Phase		11/3/11	11/3/11	1	No
Planning Phase		11/3/11	11/16/11	10	No
Prepare Cost & Benefit Estimates	Business Analyst, Project Manager	11/3/11	11/8/11	4	No
Define Scope	Project Manager	11/9/11	11/14/11	4	No
Create Project Schedule	Project Manager	11/15/11	11/15/11	1	No
Develop Resource Plan	Project Manager	11/16/11	11/16/11	1	No
Planning Phase Gate	Project Manager	11/16/11	11/16/11	1	No
Design Phase		11/17/11	11/30/11	10	No
Construction Phase		12/1/11	12/28/11	20	No
Deployment Phase		12/29/11	1/25/12	20	No
Closing Phase		1/26/12	1/30/12	2	No

Use the Browse icon, if displayed, to add more resources or roles.

All Clarity Resources and Roles are available to assign to the task.

Task Available Resources

Role: [-- Select --]

Resource Type: [-- Select --]

Employment: [-- Select --]

Team: [X] [H]

Select the Resources or Roles to be added and click on the Add button.

Name	Team Member	Start	Finish	Email	Role
Abrams, Arthur	No			abrams@anywhere.com	
Administrators, Niku	No			username@mailserver.com	
Administrators, XC	No			xc_admin@mailserver.com	
Akimoto, Anita	No			admin@mailserver.com	
Architect	Yes	11/1/11	6/10/12		Architect
Arya, Vishal	No			vishal.arya@digitalcelernity.com	
Berry, Jason	No			jasonBerry@mailserver.com	
Business Analyst	Yes	11/1/11	6/10/12		Business Analyst
Business Analyst, Senior	No				
Chief Executive	No				

The Team Member column indicates whether the Resource/Role is a team member. You can select any Resource/Role even if not a Team Member.

Add Add and Select More Return

## Assign Resources to Tasks from the Resource Pool

Clarity PPM

Project: Corporate IT Project - Gantt [Changes have been made. Hit save or discard to enable full toolbar.]

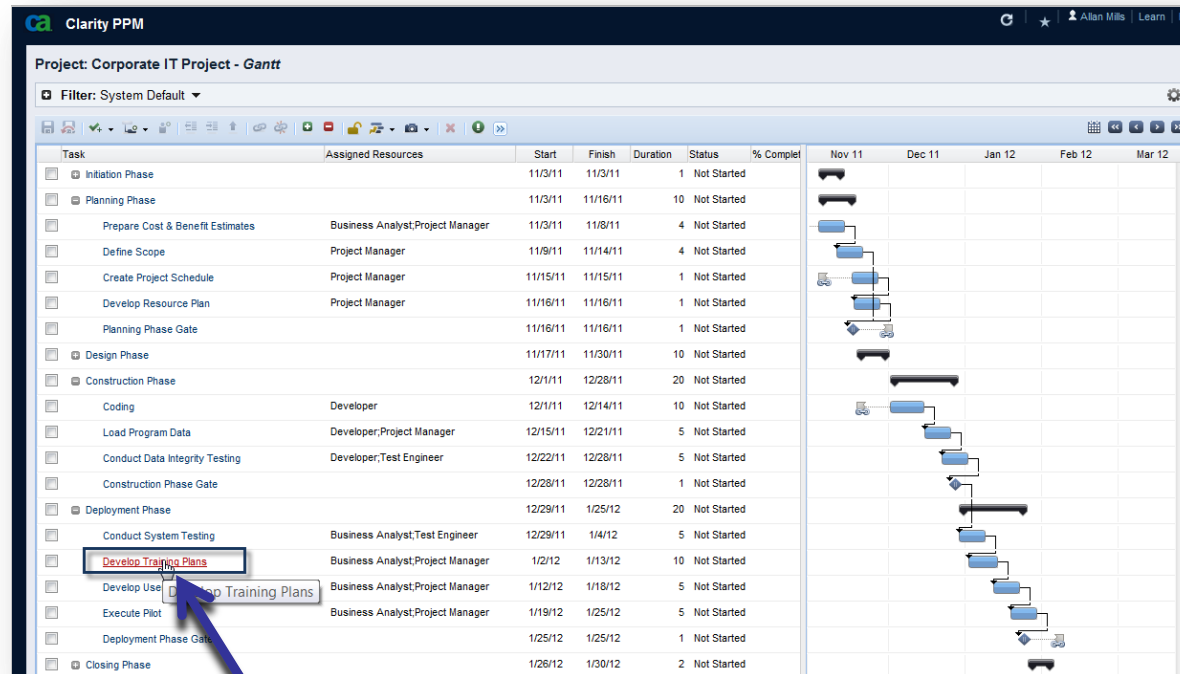
Filter: System Default

Task	Assigned Resources	Start	Finish	Duration	Status	% Compl...
Initiation Phase		11/3/11	11/3/11	1	Not Started	0%
Planning Phase		11/3/11	11/16/11	10	Not Started	0%
Prepare Cost & Benefit Estimates	Business Analyst, Project Manager	11/3/11	11/8/11	4	Not Started	0%
Define Scope	Project Manager	11/9/11	11/14/11	4	Not Started	0%
Create Project Schedule	Project Manager	11/15/11	11/15/11	1	Not Started	0%
Develop Resource Plan	Project Manager, Akimoto, Anita, Business Analyst	11/16/11	11/16/11	1	Not Started	0%
Planning Phase Gate		11/16/11	11/16/11	1	Not Started	0%
Design Phase		11/17/11	11/30/11	10	Not Started	0%
Construction Phase		12/1/11	12/23/11	20	Not Started	0%
Deployment Phase		12/29/11	1/25/12	20	Not Started	0%
Closing Phase		1/26/12	1/30/12	2	Not Started	0%

The new Roles or Resources are assigned.

## Task Assignment View

- Users can view and edit time varying ETCs enabling more accurate planning of project work.



Click on the link for a task in the Gantt chart.

## Task Assignment View

Project: Corporate IT Project | Task: Develop Training Plans - Task Properties

**ALERT:** The time periods requested do not exist. Review the column's Time Scale settings.

**General**

Name: Develop Training Plans  
 ID: LM.005.020  
 Start: 1/2/2012  
 Finish: 1/13/2012  
 Key Task: ☐  
 Milestone: ☐  
 Fixed Duration: ☐

Status: Not Started  
 % Complete: 0%  
 Baseline Start:  
 Baseline Finish:  
 Priority: 10  
 Exclude from Autoscheduling: ☐

[Save] [Save And Return] [Return] [Links][Notes]

**Assignments**

	Resource	Role	Loading Pattern	Start	Finish	Actuals	Actual Cost	ETC	EAC	ETC By Period					
										12/12/11	12/19/11	12/26/11	1/2/12	1/9/12	
<input type="checkbox"/>	Business Analyst	Business Analyst	Fixed	1/2/12	1/13/12	0.00	0.00	10.00	10.00				5	5	
<input type="checkbox"/>	Project Manager	Project Manager	Fixed	1/2/12	1/13/12	0.00	0.00	15.00	15.00				5	10	
<b>Total</b>						0.00	0.00	25.00	25.00						

Displaying 1 - 2 of 2

[Save] [Assign] [Replace] [Remove]

☐ = Role Work Effort = Hours  
 Currency = USD

Edit the time varying ETC directly on the page.

Remember: Red carats indicate the changes have not been saved.

# Open Workbench v2 Differences



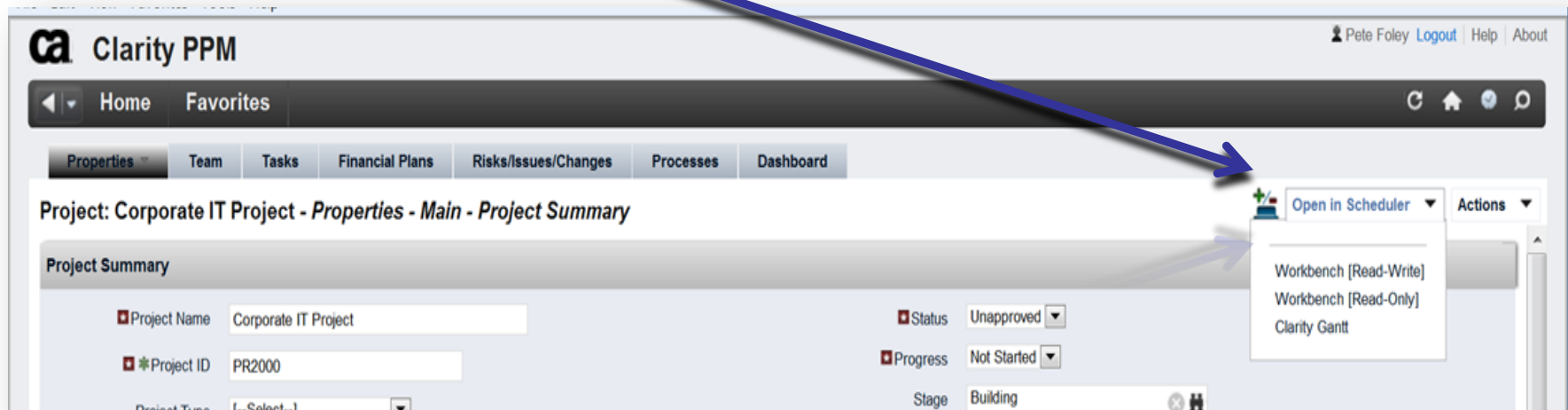
- **New User Interface**
- **Quick Search**
- **Selective Scheduling**
- **Quick Creation of Project Plans**





## New Launch Location in Clarity

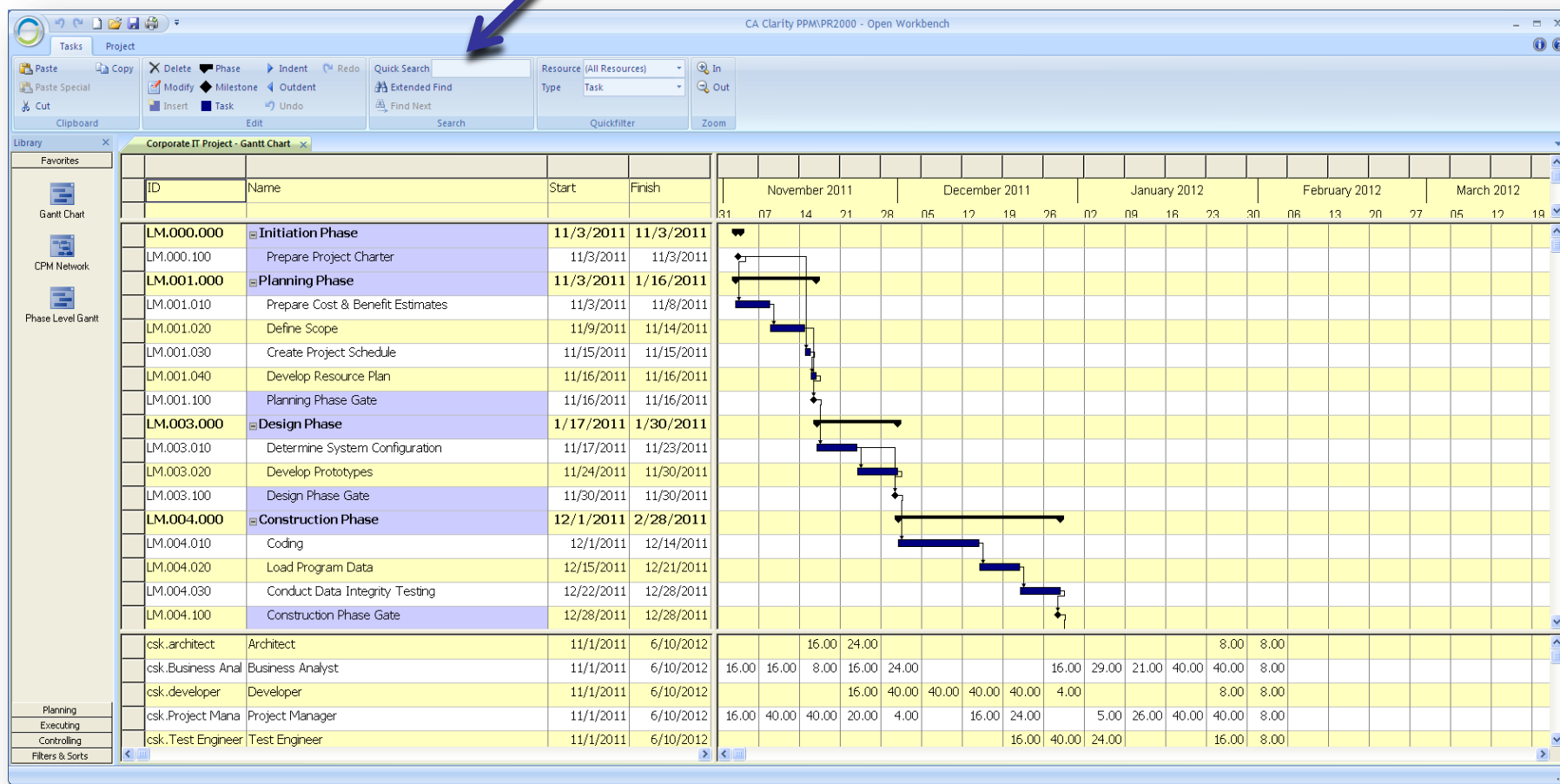
- The Launch Scheduler option on the Project Properties: Main page is now on the right side.



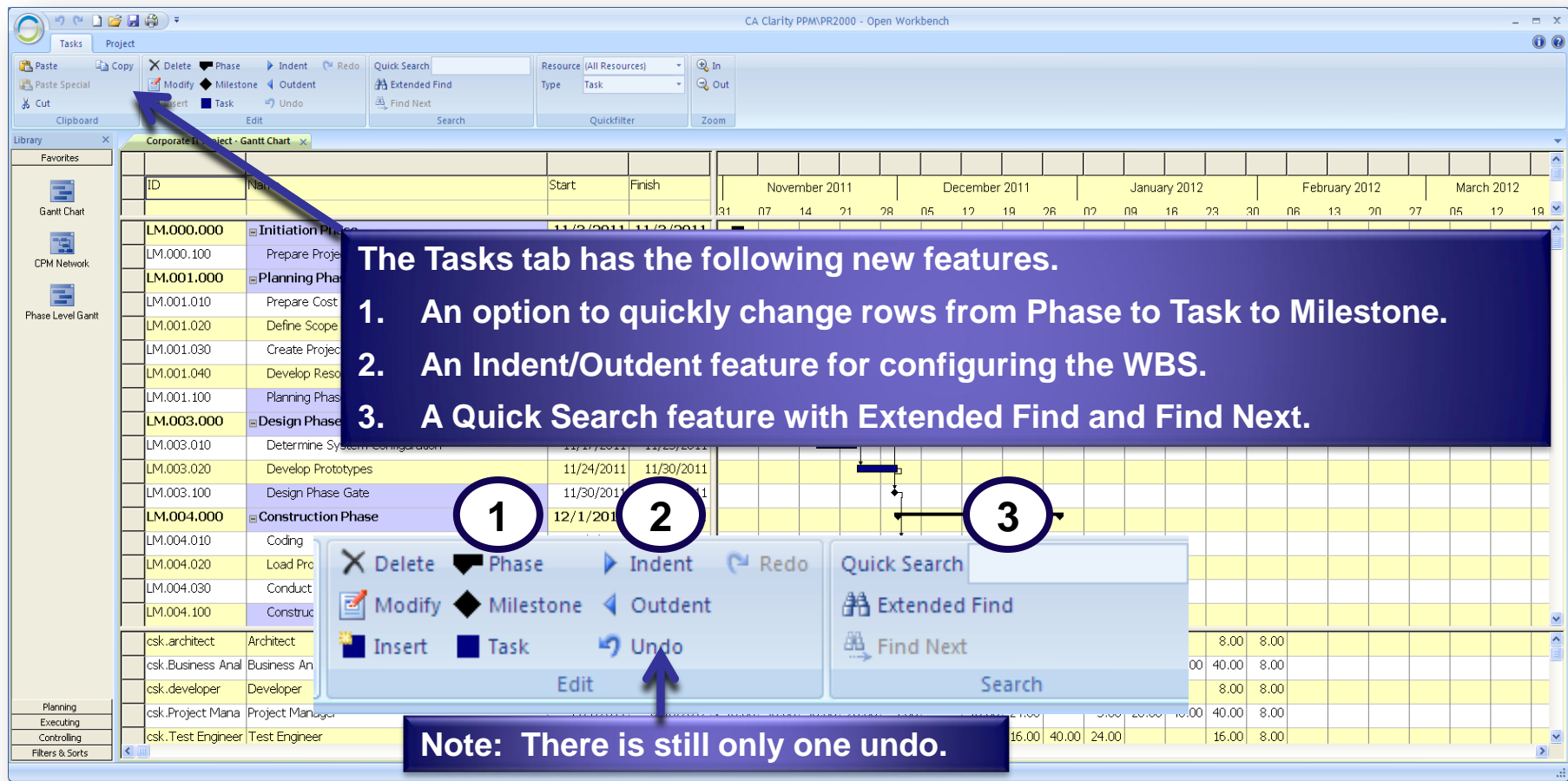
# Open Workbench v2 Differences

## New Features

A new ribbon interface provides easy access to all commands found in the Open Workbench toolbar and menus.



## New Features

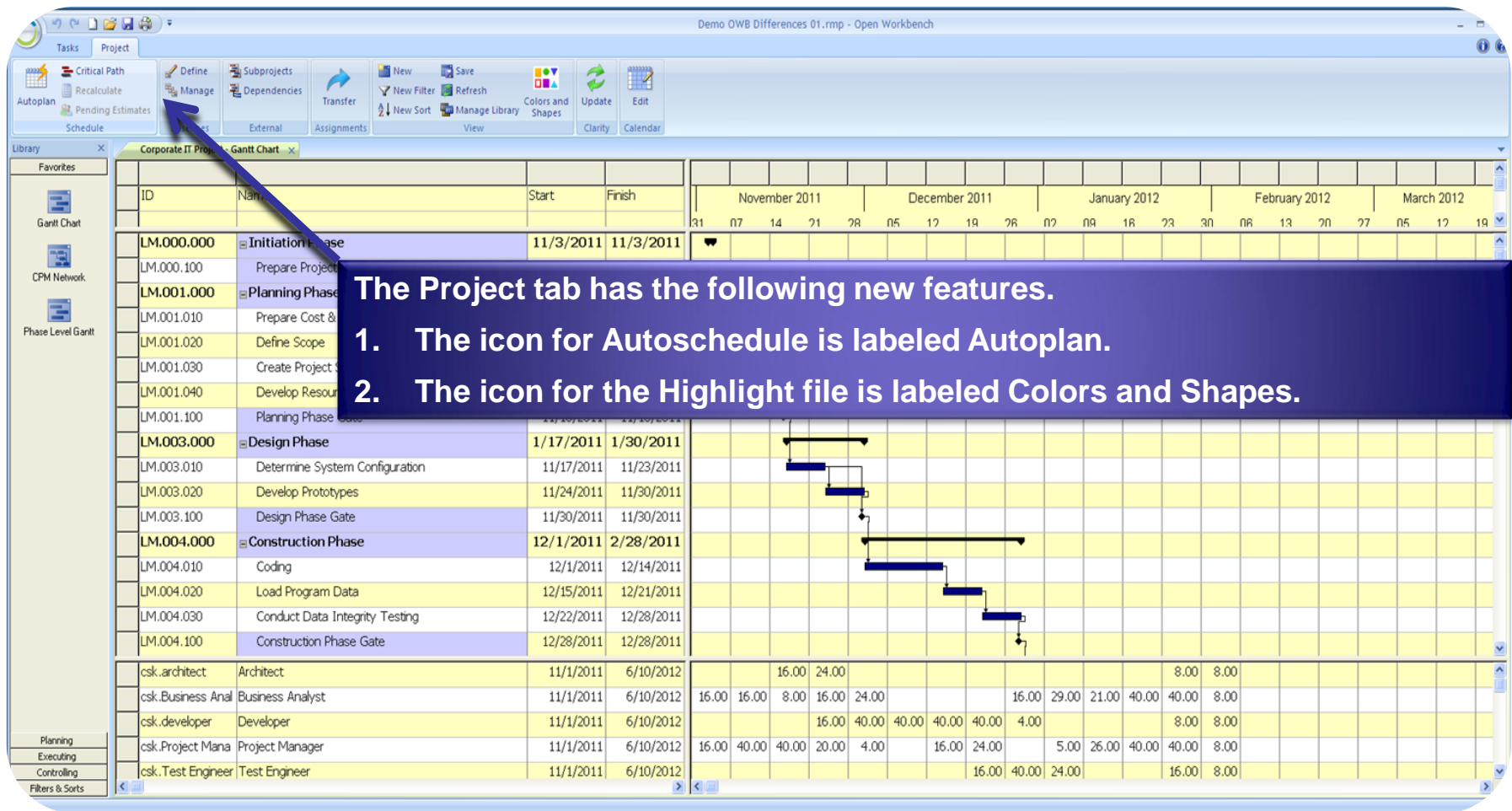


The Tasks tab has the following new features.

1. An option to quickly change rows from Phase to Task to Milestone.
2. An Indent/Outdent feature for configuring the WBS.
3. A Quick Search feature with Extended Find and Find Next.

Note: There is still only one undo.

## New Features



The Project tab has the following new features.

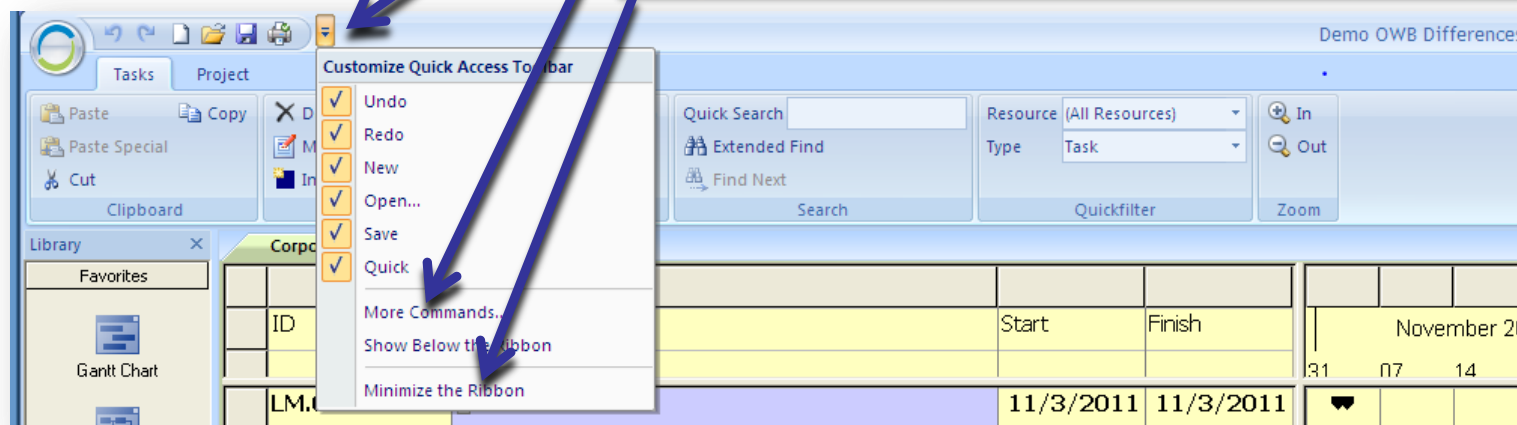
1. The icon for Autoschedule is labeled Autoplan.
2. The icon for the Highlight file is labeled Colors and Shapes.

ID	Name	Start	Finish
LM.000.000	Initiation Phase	11/3/2011	11/3/2011
LM.000.100	Prepare Project		
LM.001.000	Planning Phase		
LM.001.010	Prepare Cost &		
LM.001.020	Define Scope		
LM.001.030	Create Project		
LM.001.040	Develop Resour		
LM.001.100	Planning Phase Gate		
LM.003.000	Design Phase	1/17/2011	1/30/2011
LM.003.010	Determine System Configuration	11/17/2011	11/23/2011
LM.003.020	Develop Prototypes	11/24/2011	11/30/2011
LM.003.100	Design Phase Gate	11/30/2011	11/30/2011
LM.004.000	Construction Phase	12/1/2011	2/28/2011
LM.004.010	Coding	12/1/2011	12/14/2011
LM.004.020	Load Program Data	12/15/2011	12/21/2011
LM.004.030	Conduct Data Integrity Testing	12/22/2011	12/28/2011
LM.004.100	Construction Phase Gate	12/28/2011	12/28/2011
csk.architect	Architect	11/1/2011	6/10/2012
csk.Business Anal	Business Analyst	11/1/2011	6/10/2012
csk.developer	Developer	11/1/2011	6/10/2012
csk.Project Mana	Project Manager	11/1/2011	6/10/2012
csk.Test Engineer	Test Engineer	11/1/2011	6/10/2012

## New Features

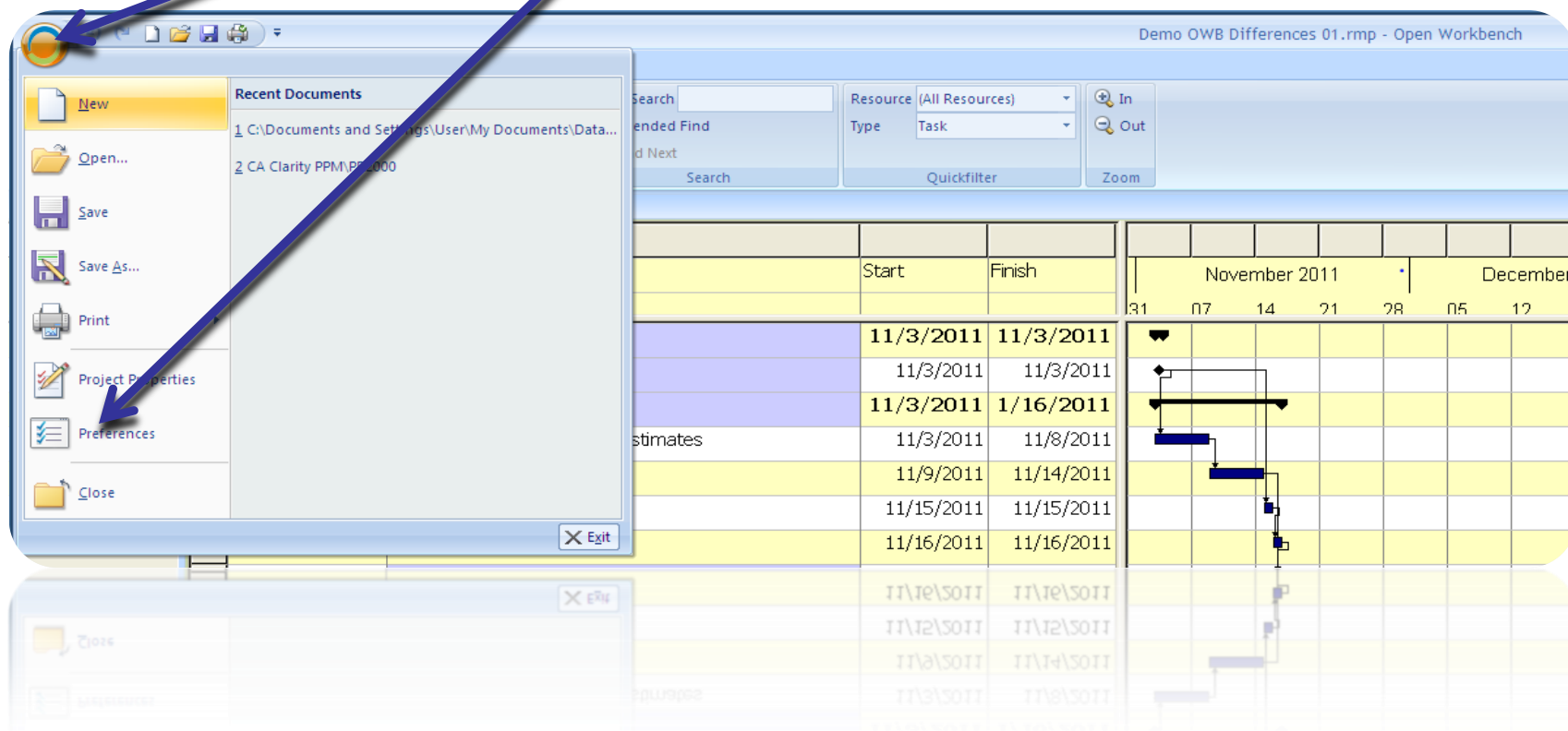
Click on the drop-down for the Quick Access Toolbar to:

1. Add or remove commands.
2. Minimize the Ribbon.

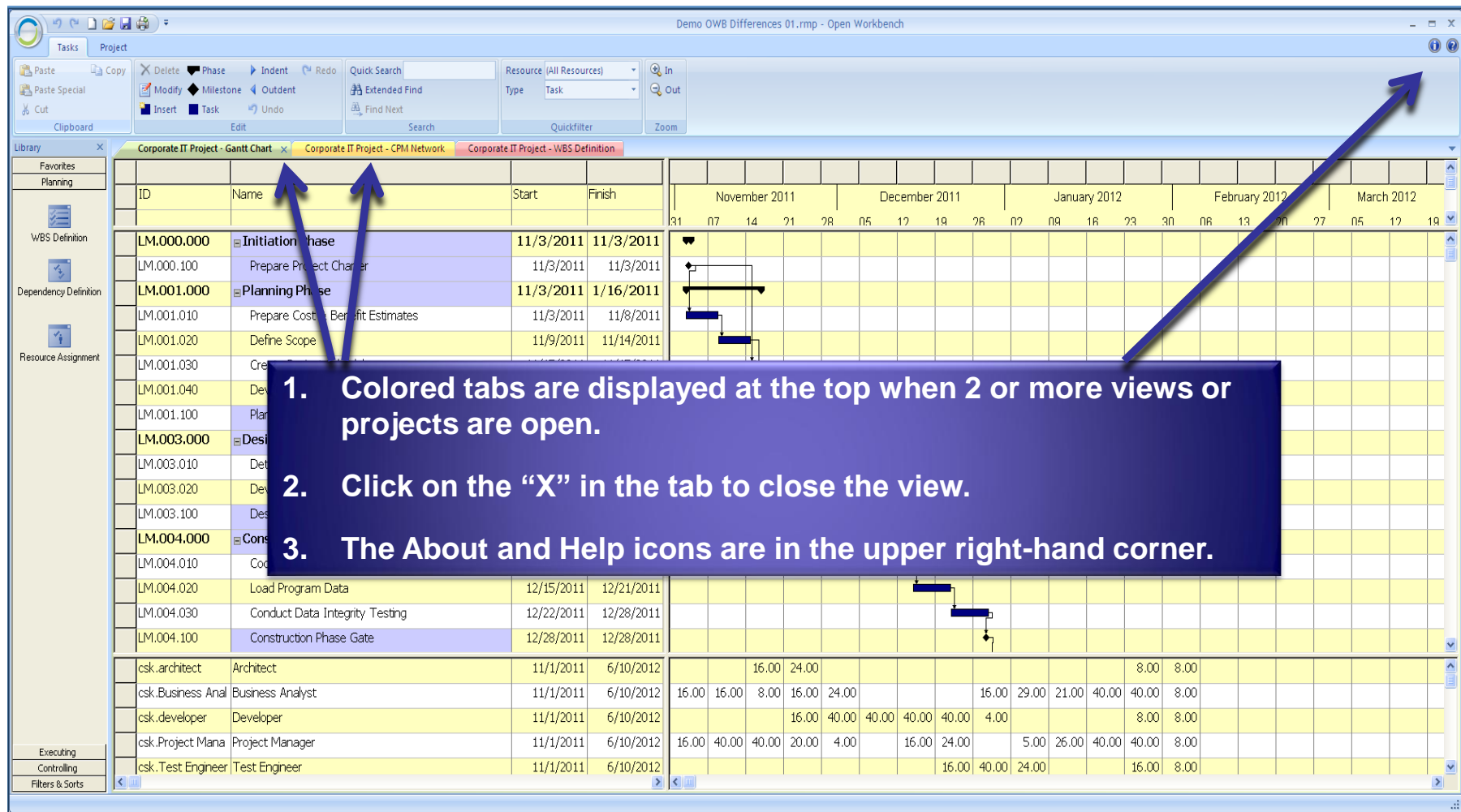


## New Features

1. Click on the circular File icon to access the standard file commands.
2. The former Options command is labeled Properties.



## New Features



**1. Colored tabs are displayed at the top when 2 or more views or projects are open.**

**2. Click on the "X" in the tab to close the view.**

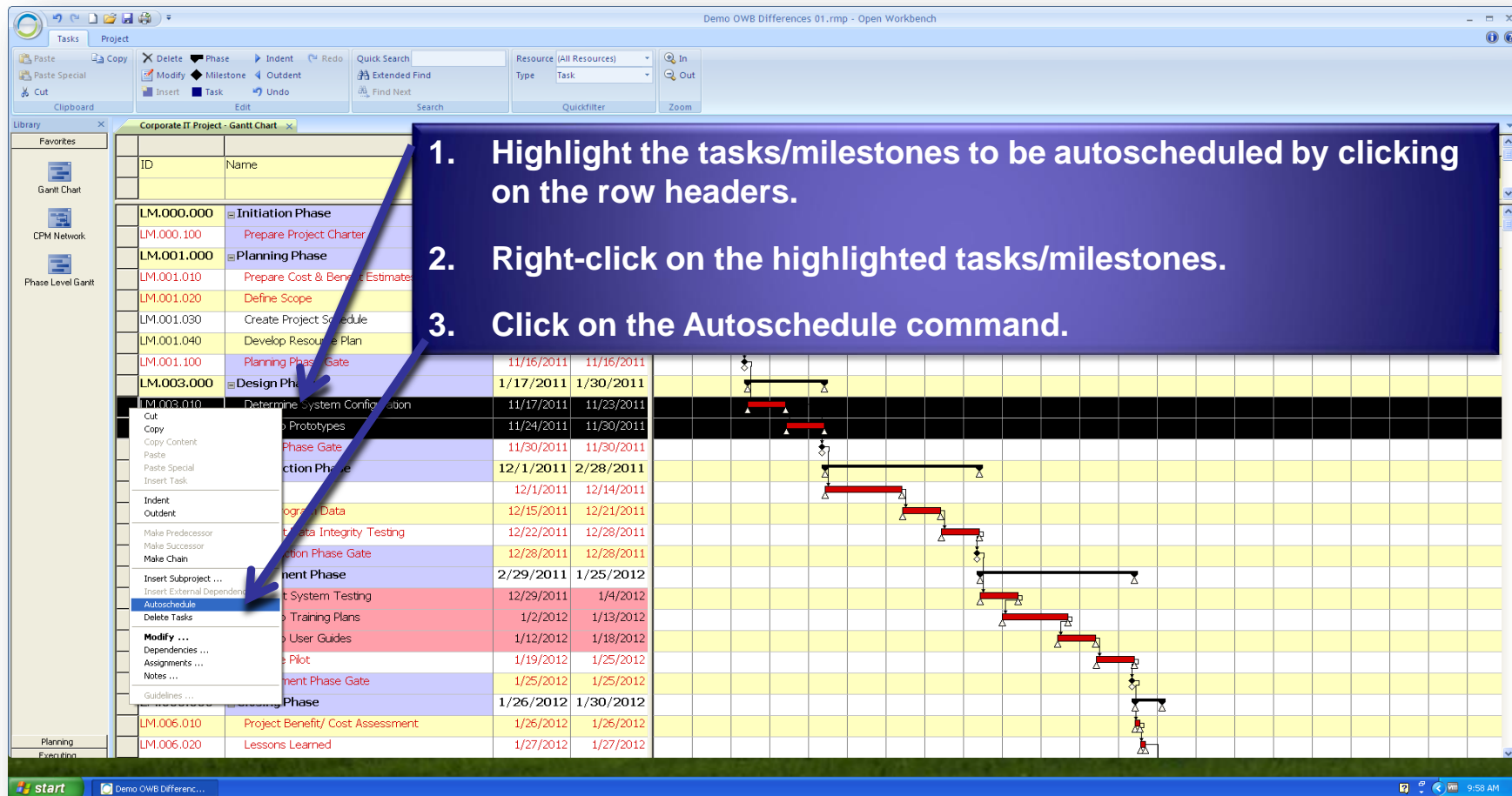
**3. The About and Help icons are in the upper right-hand corner.**

ID	Name	Start	Finish
LM.000.000	Initiation Phase	11/3/2011	11/3/2011
LM.000.100	Prepare Project Charter	11/3/2011	11/3/2011
LM.001.000	Planning Phase	11/3/2011	1/16/2011
LM.001.010	Prepare Cost-Benefit Estimates	11/3/2011	11/8/2011
LM.001.020	Define Scope	11/9/2011	11/14/2011
LM.001.030	Create Work Breakdown Structure		
LM.001.040	Develop Project Management Plan		
LM.001.100	Plan		
LM.003.000	Design Phase		
LM.003.010	Define Requirements		
LM.003.020	Develop Solution Architecture		
LM.003.100	Design		
LM.004.000	Construction Phase		
LM.004.010	Code		
LM.004.020	Load Program Data	12/15/2011	12/21/2011
LM.004.030	Conduct Data Integrity Testing	12/22/2011	12/28/2011
LM.004.100	Construction Phase Gate	12/28/2011	12/28/2011
csk.architect	Architect	11/1/2011	6/10/2012
csk.Business Anal	Business Analyst	11/1/2011	6/10/2012
csk.developer	Developer	11/1/2011	6/10/2012
csk.Project Mana	Project Manager	11/1/2011	6/10/2012
csk.Test Engineer	Test Engineer	11/1/2011	6/10/2012



## New Features

### ➤ Autoschedule Specific Tasks



**1. Highlight the tasks/milestones to be autoscheduled by clicking on the row headers.**

**2. Right-click on the highlighted tasks/milestones.**

**3. Click on the Autoschedule command.**

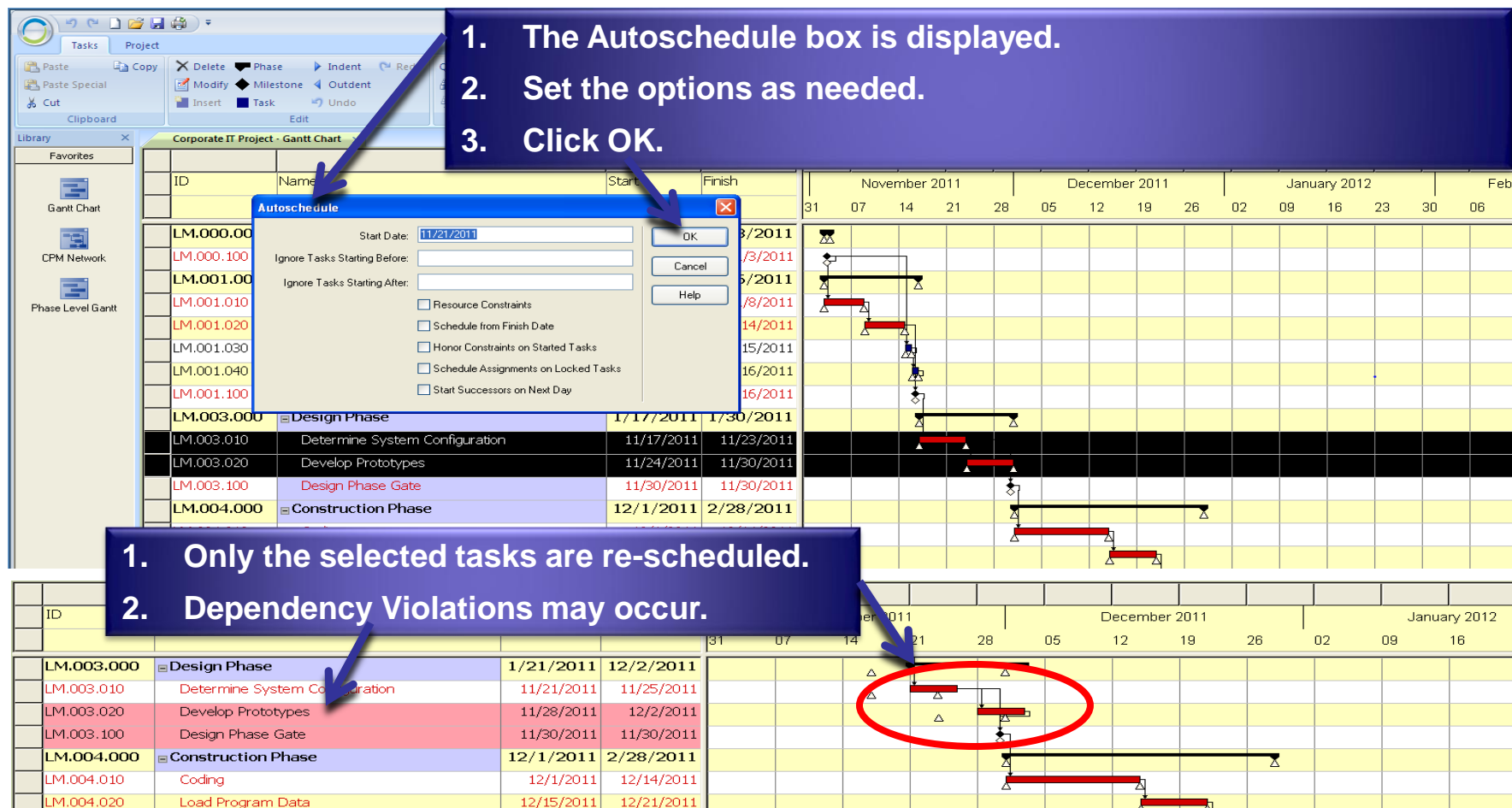
The screenshot shows the 'Corporate IT Project - Gantt Chart' with a context menu open over a task. The menu includes options like 'Cut', 'Copy', 'Paste', 'Insert Task', 'Indent', 'Outdent', 'Make Predecessor', 'Make Successor', 'Make Chain', 'Insert Subproject...', 'Insert External Dependencies', 'Autoschedule', 'Delete Tasks', 'Modify...', 'Dependencies...', 'Assignments...', 'Notes...', and 'Guidelines...'. The 'Autoschedule' option is highlighted in blue.

ID	Name	Start Date	End Date
LM.000.000	Initiation Phase		
LM.000.100	Prepare Project Charter		
LM.001.000	Planning Phase		
LM.001.010	Prepare Cost & Benefit Estimate		
LM.001.020	Define Scope		
LM.001.030	Create Project Schedule		
LM.001.040	Develop Resource Plan		
LM.001.100	Planning Phase Gate	11/16/2011	11/16/2011
LM.003.000	Design Phase		
LM.003.010	Determine system Configuration	1/17/2011	1/30/2011
	Prototypes	11/17/2011	11/23/2011
	Phase Gate	11/24/2011	11/30/2011
	Execution Phase	11/30/2011	11/30/2011
		12/1/2011	2/28/2011
		12/1/2011	12/14/2011
		12/15/2011	12/21/2011
		12/22/2011	12/28/2011
		12/28/2011	12/28/2011
	Implementation Phase	2/29/2011	1/25/2012
	System Testing	12/29/2011	1/4/2012
	Training Plans	1/2/2012	1/13/2012
	User Guides	1/12/2012	1/18/2012
	Pilot	1/19/2012	1/25/2012
	Implementation Phase Gate	1/25/2012	1/25/2012
	Phase	1/26/2012	1/30/2012
LM.006.010	Project Benefit/ Cost Assessment	1/26/2012	1/26/2012
LM.006.020	Lessons Learned	1/27/2012	1/27/2012



## New Features

### ➤ Autoschedule Specific Tasks



**1. The Autoschedule box is displayed.**  
**2. Set the options as needed.**  
**3. Click OK.**

**1. Only the selected tasks are re-scheduled.**  
**2. Dependency Violations may occur.**

ID	Name	Start	Finish
LM.000.000			
LM.000.100			
LM.001.000			
LM.001.010			
LM.001.020			
LM.001.030			
LM.001.040			
LM.001.100			
LM.003.000	Design Phase	11/17/2011	11/30/2011
LM.003.010	Determine System Configuration	11/17/2011	11/23/2011
LM.003.020	Develop Prototypes	11/24/2011	11/30/2011
LM.003.100	Design Phase Gate	11/30/2011	11/30/2011
LM.004.000	Construction Phase	12/1/2011	2/28/2011
LM.004.010	Coding	12/1/2011	12/14/2011
LM.004.020	Load Program Data	12/15/2011	12/21/2011

# Microsoft® Project 2010 Differences



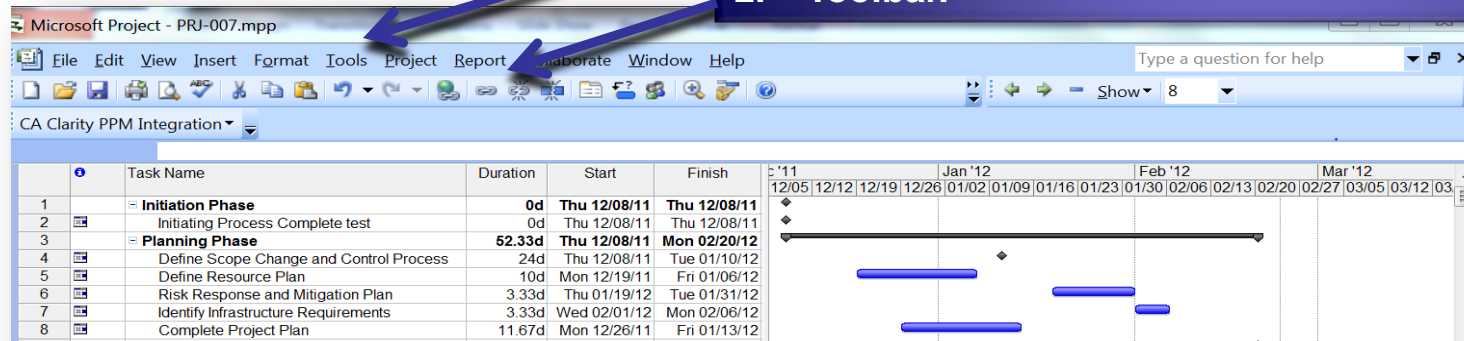
- **Quick Launch Toolbar**
- **Functional Ribbon Bar**
- **Project Timeline and Full Schedule Display**
- **Add New Column and Manual Schedule Options**

# Microsoft® Project 2010 Differences

## New Features

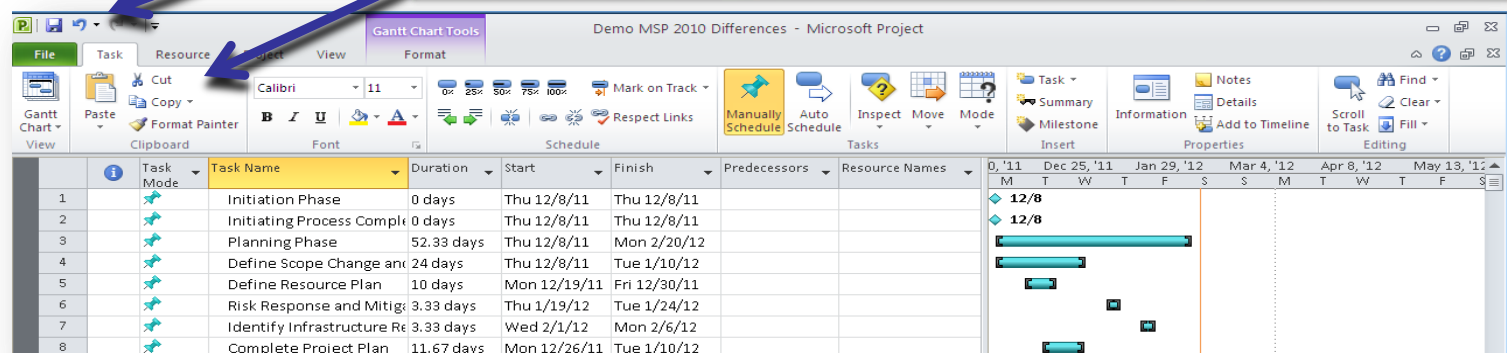
MS Project 2007 and earlier versions have the

1. Standard View Menu and
2. Toolbar.



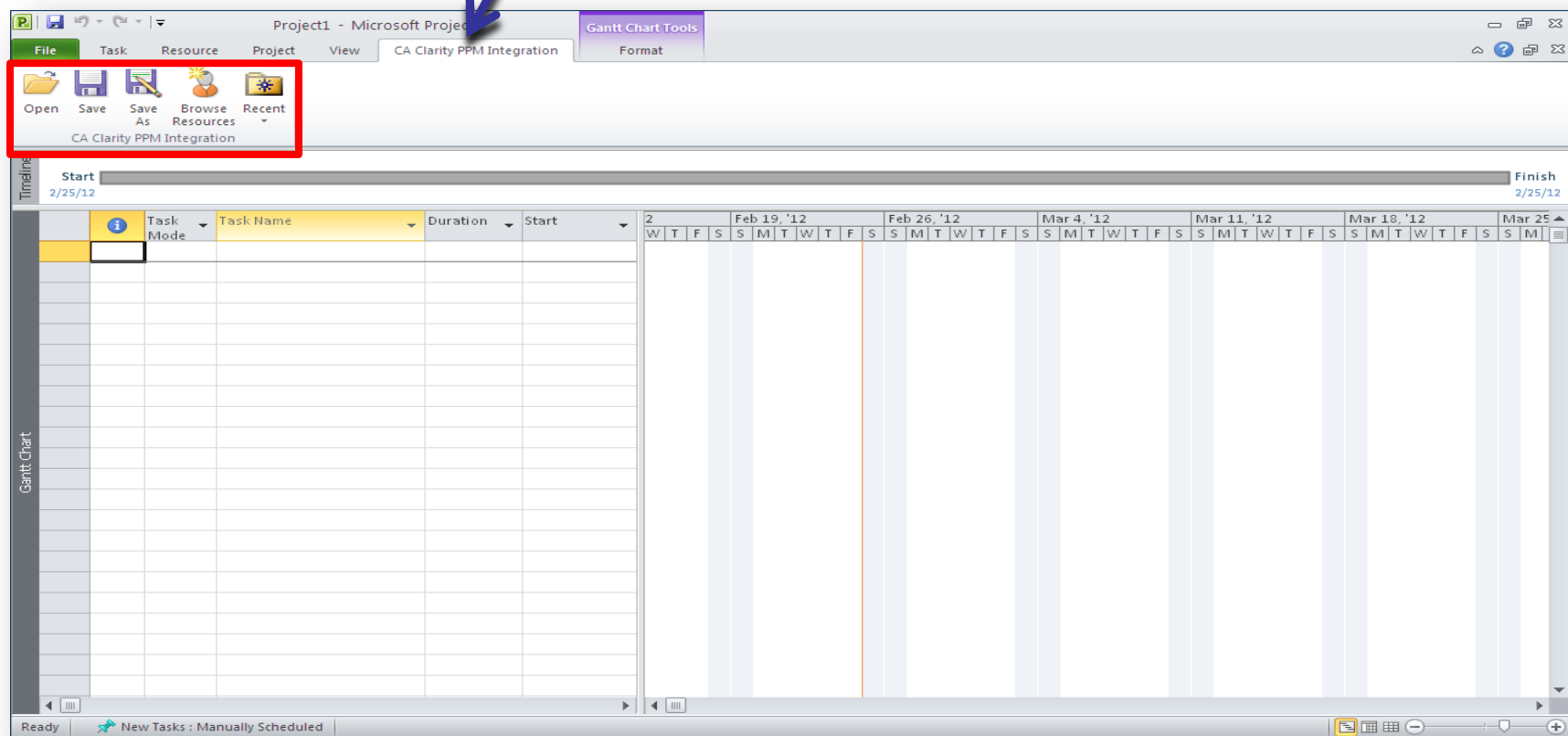
MS Project 2010 has a

1. Quick Launch Toolbar and
2. Functional Ribbon Bar.



## New Features

The CA Clarity PPM Integration tab provides the same access to Clarity.



## Course Summary

- **CA Clarity PPM v13 Differences Overview**
  - Access Applications Menu
  - Navigate the Application
  - Configure the Favorites Menu
  - Edit Data Using InLine Editing
  - Use Auto-suggest to Select Values for Fields
  - Object Sub-menu
  - Page Button Changes
  - Interactive Gantt
  - Assign Resources to Tasks from the Resource Pool
  - Task Assignment View
- **Open Workbench v2 Differences**
- **MS Project 2010 Differences**

# Thank You

For attending



CA Clarity PPM v13  
Differences Course  
Self-Paced Training



# Questions?

## We have answers...



**ca** CA Clarity™ Project &  
Portfolio Management Version 13





# Thank You!

For attending



CA Clarity PPM v13  
Differences Course

**Self-Paced, CBT Package**

**Free when you upgrade with DC**