

# CA Project & Portfolio Management

## At A Glance

Speed up your innovation with CA Project & Portfolio Management's drag-and-drop tool for top-down road mapping. Create business initiatives, add budgets and assign IT and business teams with a few clicks. Whether complex workflow for HR or simple task management for sales, workers now spin up projects in minutes—not days. Add in-app collaboration to eliminate redundant meetings, a familiar Microsoft Excel®-like grid to manage budgets, a new connection for third-party business intelligence (BI) tools to unearth answers, and you have the most modern project portfolio management app on the market today.

### KEY BENEFITS

- **Align business goals** and investments from the start.
- **Simplify and accelerate** your continuous planning cycle.
- **Spin up projects** in minutes.
- **Crunch numbers** and share reports in your favorite scheduling or BI software.
- **Complete projects** on target, on time and on budget with in-app team collaboration.

### KEY FEATURES

- **Start your road map** with high-level initiatives.
- **Assign teams**, budgets and time lines with a few clicks.
- **Track projects** on dashboard tiles, with links to key gauges and modules.
- **Manage budgets** and plans on an Excel-style grid.
- **Connect to Power BI**, Qlik and other BI tools.
- **Link to scheduling software**, including Open Workbench and Microsoft Project.
- **Organize and gauge team work** on task boards.
- **Map resources and investments** on any organizational level.

## Business Challenges

Beyond IT, an entire business is looking for new ways to bring innovation to market. Teams have to work faster, act smarter and stay more attuned to customer demands in order to survive today. Juggling project ideas, resource capacity and detailed budgets, IT and business users grapple with the same questions: How do we capitalize on new opportunities? How do we deliver value faster? How do we maximize our resources?

But without the proper project portfolio management solution, enterprise planning can be difficult. With information stored in emails and spreadsheets, decisions are based on unreliable data, progress lacks tracking and chance dictates the outcome.

## Solution Overview

The new features in CA Project & Portfolio Management (CA PPM)—a simple, powerful and practical project portfolio management tool available on-premises and in the cloud—let you modernize the project management office.

- Engage the leadership from the start with drag-and-drop road mapping tools that paint a visual picture of your main initiatives.
- Customize projects for any business unit—including IT, marketing and facilities—by dragging and dropping components onto the template.
- Workers can spin up preconfigured projects in minutes.
- Excel-style grid makes managing budgets fast and easy, with double-click access to the underpinning cost details.
- Enhance your financial analysis with new connectors to your favorite BI tool and scheduling software.
- A visual task list, the new task board helps you collect, prioritize and track work in an environment where all team members can contribute ideas and report updates.
- With easy sharing and seamless collaboration, you can ask questions and solve problems on the project, resource and task level.

## Critical Differentiators

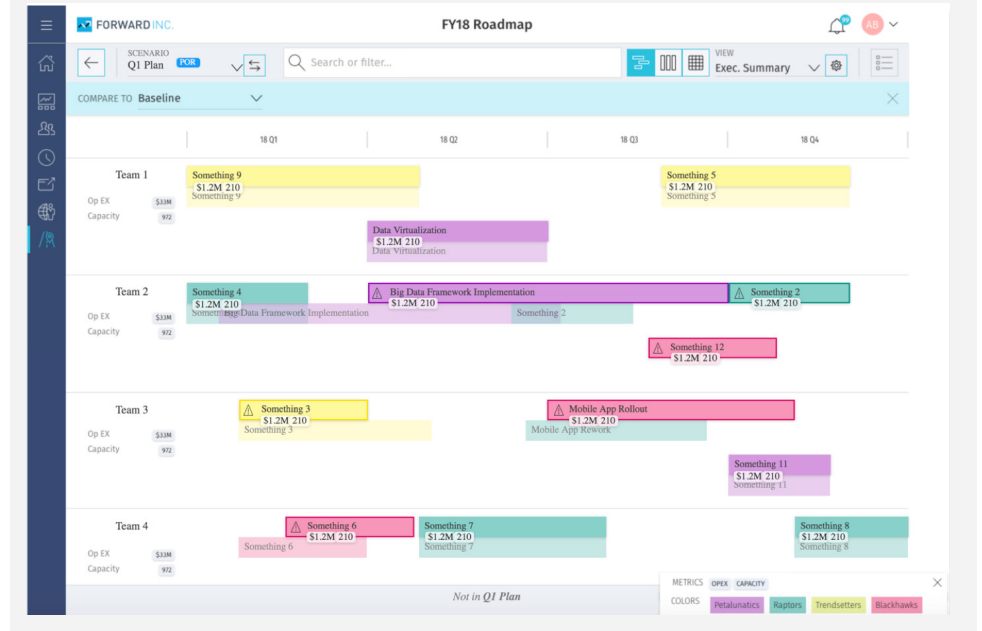
**Top-down planning.** Most of us are stuck building road maps from the ground up, filling out hundreds of required fields just to get started. Turn it around. Get alignment between your business goals and investments by planning from the top down. With a visual dashboard of all big projects, it's easy to add details about budgets, risks and resources as you go. Simplify your road map and bring new ideas to market faster.

**Keeping it simple with project blueprints.** With drag-and-drop ease, you can configure the standard CA PPM project template to fit any team's or department's needs. While IT and HR may require multi-layered templates for global transformation projects, sales and marketing can often make do with basic task-management tools. Simply add project details, insert page sections, tasks and documents—and select from a growing library of key performance indicator gauges.

**Project management for everyone.** With only the required information, modules and dashboards displayed, any business user can spin up and onboard new projects in less than 30 minutes. On the project tiles is a snapshot of budget spent, tasks completed, next milestones and other KPIs. As projects mature, additional components can be added to the templates in seconds.

**Familiar financial management.** Working with the same grid layout and grouping functions found in Excel, financial analysts can sort line items by cost type or transaction class. Drill into the underlying expenses with a click and navigate through planned, actual and forecast amounts with quick views. Actual spending is always up-to-date, showing you the remaining budget in real time.

### Top-down road mapping accelerates innovation



**Deeper analytics.** CA PPM SaaS allows cloud-based customers to connect to major BI systems, including Power BI and Qlik. For robust plans requiring scheduling and dependency capabilities, link to outside tools, like Open Workbench and Microsoft Project.

**Tighter team collaboration.** Create a visual task list in minutes on the new task board. For each project, set your own process flow, assign staff to tasks and prioritize work. Keep all team members in synch and share your plans with other groups and executives. Drill into a specific project, resource or task and ask questions, provide answers or in other ways collaborate. Eliminate emails and meetings by augmenting posts with attachments and links to CA Agile Central, Microsoft SharePoint® or Google Drive.

**Balanced resource management.** By filtering available resources and investments down to the department or team level, you can match supply and demand across any major enterprise. Multi-value searches, like capacity based on role and geography, optimize your already stretched staff. Once you find the right people, you now can allocate specific percentages of their workload.

For more information, please visit [ca.com/ppm](https://ca.com/ppm)

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