

## CA SERVICES:

KPI Monitor for CA Clarity PPM

# KPI Monitor for CA Clarity™ Project and Portfolio Management



## What it does

KPI Monitor for CA Clarity™ Project and Portfolio Management (CA Clarity PPM) helps CA Clarity PPM users including project managers and executives monitor critical CA Clarity PPM data through defined business performance metrics and exceptions. With KPI Monitor from CA Clarity PPM, data is presented in a convenient dashboard as key performance indicators (KPIs) and exceptions to established thresholds. The KPIs and exception-based presentation of data allow users to proactively monitor business performance metrics and focus on high priority issues that need attention. It also reduces the need to run reports and perform repetitive ad hoc data analysis which can be time consuming and prone to error.

The solution supports 25 KPIs which are defined by configurable business rules that can be activated or deactivated, and modified to align to business requirements. KPI Monitor for CA Clarity PPM also includes predefined data consistency rules, many of which involve financial data attributes, to enforce data integrity.

KPI Monitor for CA Clarity PPM supports processes, business rules and data integrity requirements. The solution helps:

- Ensure that the proper project lifecycle steps have been performed and completed in the proper sequence
- Validate that best practices such as project baselining and financial enablement are employed
- Enforce the proper charge code definition for projects so that timesheets are processed appropriately
- Ensure that the correct subset of resources is open for time entry
- Identify active users mistakenly omitted from a certain required security group
- Ensure that all projects are present in a specified OBS definition and that active projects open for time entry have an approved budget plan

The solution includes a KPI object with 25 predefined configurable KPI rules, a stored procedure and a job to call the stored procedure, a workflow process to check project completeness based on rules stored in the object, two NSQL portlets, one business objects universe, installation files, documentation, a test plan that covers 20 specific use cases, and up to two hours of remote professional services related to installation, setup, testing or use.

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## Benefits that deliver value

KPI Monitor for CA Clarity PPM:

- Helps organizations derive greater value from CA Clarity PPM data by presenting it as KPIs and exceptions delivered in a context that is clear and consistent to users
- Enables users to proactively monitor critical data with less effort and risk of error to meet business objectives
- Controls who receives which KPI and exception data based on user role and login information

## How it works

Using a SQL stored procedure, a job is run by KPI Monitor for CA Clarity PPM which calculates the KPIs and checks the results for values that violate thresholds defined in the business rules. These business rules reside in the KPI object and can be modified to align to business requirements. Exceptions to thresholds are stored in a permanent data table that serves as an operational data store for two portlets:

1. **The KPI Threshold Portlet** – displays KPI and exceptions data sorted by primary responsible party (used by CA Clarity PPM administrators and project teams)
2. **The My KPI Portlet** – displays KPI and exception data specifically relevant for an individual active user

These portlets display a row for each instance of noncompliant data, a descriptive error message, a description of error symptoms, severity information and detail about the object instance (KPI) that is in violation.

If enabled for a project, the workflow notifies project managers about missing data that requires remediation.

The job that supports KPI Monitor for CA Clarity PPM can be scheduled to run as often as needed to provide users with timely data with minimal impact to production systems.

## Table of pre-defined KPIs

Assignments exceeding baseline hours	Late tasks	Projects exceeding baseline hours
Assignments with too many baseline hours	Overallocated resources (by month)	Projects not baselined
Change requests with high priority and an effect on cost	Overallocated team members (by month)	Project risk count
Incidents resolved with no resolution date	Overassigned resources (by month)	Projects started with open requisitions
Incidents with high urgency past expected end date	Portfolios active past finish date	Risks with a high impact and priority
Investments with no approved budget	Project change requests count	Tasks exceeding baseline hours
Issues with a high priority	Project issues count	Timesheets not approved yet
Late projects	Projects baselined too often	Timesheets not submitted yet
		Timesheets with excessive hours

## Technical prerequisites

- OS Support: Linux, UNIX, AIX, Microsoft Windows
- Database Support: Microsoft SQL Server, Oracle Server
- Java JDK 1.4.2 or above
- CA Clarity PPM version 8.1 or higher
- Language: English