The Modern PMO:
The ability to analyze change and respond quickly is essential in any competitive market. Organizations need to be able to make decisions based on a comprehensive, accurate and up to date view of what’s happening across all their initiatives.

As cycles accelerate and timelines shorten, projects are being recognized—by necessity—as the delivery arm for strategy. In this environment, anything less than real-time access to real-time project data is too slow, because businesses need to know where they’re heading, not just where they’ve been. CA Project & Portfolio Management (CA PPM 15.3) has added new capabilities to support project, financial and resource management across individual initiatives and entire portfolios. We’ve also built new, embedded BI capabilities that make powerful data and insights more accessible to everyone.
Meet Rita Lee, Financial Manager

It’s Rita’s responsibility to create budgets, project cash flows, and determine how to finance projects. A huge part of her job is minimizing financial risk, which involves creating projections to determine which initiatives are likely to go over budget and advising the company on how to respond and manage investments across projects. Business today moves fast, and she needs real-time visibility into project finances in order to ensure projects stay on track.

“I need to constantly analyze change and advise accordingly. With project financial information right at my fingertips. I don’t have to bother the Project Manager.”
Financial transparency is key to project success

Having accurate visibility into the financial health of a project is essential. It requires the ability to pivot smoothly between planned, actual and forecasted data, and the tools to extract key insights in real time, from real-time data. With CA PPM, all your data is in one place, and moving between views is only a click away.

Complex data models are expensive:

“70 percent of the effort that goes into creating a typical ad hoc report is spent writing queries and cleaning up the suboptimal data.”

- Treb Gatte, Tumble Road, LLC.
Rita’s *pain points*

**Lack of access to data:**
Having to spend time importing data from other sources, tracking down data from project managers or waiting for a data specialist to pull reports means Rita often gets crucial information too late.

**Relying on third-party tools:**
Because their existing PPM tools lack the power or ease of use to do everything she needs, she often has to spend valuable time cutting and pasting to build her own reports in Microsoft Excel®.

With CA PPM

Rita has all project financial data right at her fingertips, and she can pivot her view to easily compare planned, actual and forecasted numbers. She can deep-dive into a particular project area, or pull back to see trends across the whole portfolio.

73 percent of surveyed organizations report wasting time every week copying and pasting information from various sources to create a slide or another consolidated view for reporting.¹

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You asked and we responded: **Easy-to-use, familiar functionality**

The ability to easily access, view and modify project data is key to ensuring those dollars are well spent, and projects are executed on time and on budget.

The latest version of CA PPM focuses on facilitating financial management activities with the ease and familiarity of a Microsoft Excel spreadsheet. This new-but-familiar style provides visibility deep into projects without requiring additional learning, reconﬁgurations or multiple reports. It also creates significant time savings by eliminating the need to build custom reports with outside tools.
Meet
Susan Johnson,
Executive Leader

Susan is responsible for prioritizing and funding initiatives. Success for her means enabling strategic alignment across the organization and respond quickly to change in order to remain competitive. Accurate, timely access to data and information are paramount, and she wants clearer visibility into all initiatives at any moment.

“I need to analyze change quickly and advise accordingly.”
Susan's *pain points*

**Accurate Data:**
Needs to respond to change more quickly

**Real-time Access:**
Reports are outdated the moment they are received

**Transparency:**
Lacks visibility that initiatives are on track & aligned to strategy

With CA PPM

Susan gets real-time data access with the ability to drill-down into specific initiatives and leverage her BI tools for powerful insights. No matter what BI tool her organization chooses, she has valuable information right at her fingertips, without leaving the application. And having optimized and accurate data for reporting translates into cost savings and value for the organization.

“Optimized data and the right reporting tool can save an organization hundreds of thousands of dollars a year.”

- Treb Gatte, Tumble Road, LLC.
“The new generation of embedded BI technologies places insights and analysis within business processes—the fastest path from insight to action.”

The model for *modern BI*

Meaningful reporting starts with the right data warehouse

As business cycles accelerate and project timelines shorten, financial managers are realizing data that can’t be quickly and easily accessed is meaningless. Traditional data warehouses are built to incorporate and organize copious amounts of data, not necessarily to facilitate the extraction and analysis of that data. Today’s high performance data warehouses have matured to provide a solid foundation for third-party BI tools.

The CA PPM data warehouse was designed to facilitate easy extraction of the project, resource and financial information business users need for effective decision-making. CA PPM comes with embedded BI capabilities, but it also integrates seamlessly with industry leading business intelligence tools.
Trending: An upgrade to *real-time* status reports

Many BI tools provide real-time status for key components within a project, but leading solutions go a step further by offering trending. By monitoring operations over time and leveraging predictive analytics, trending allows users to predict project success or failure far earlier and with a much higher rate of accuracy.

Manage project and portfolio risk by seeing around corners

The industry-unique CA PPM data warehouse tracks changes over time, which provides a richer snapshot of project performance. It also enables companies to use past trends as a predictor of future performance, without the need for customization to capture the data.

87 percent of surveyed organizations agree that trending capabilities that help to accurately predict project success or failure throughout the life of a project are important.¹

Meet Ian Connor, Application Owner & Administrator

As an application owner and administrator, it’s Ian’s job to ensure his organization is getting maximum value out of their investment in the applications he oversees. That means ensuring those tools are easy to adopt and use and that he can configure them appropriately for a wide range of user types. Access to data and insight are essential to his organization, so he needs to ensure that his application integrates seamlessly with other reporting and BI tools.

“In order to thrive, I need to provide transparency and value to executive stakeholders.”
Ian's pain points

**Bandwidth:**
On-going requests to setup new projects each with unique business requirements

**Integration:**
Balance the evolving need for ubiquitous access to data

With CA PPM

Ian gets simple configuration, with reusable configuration tools that support the unique project business needs of the organization or individual teams. It also provides secure data communication for seamless integration between PPM and market leading BI tools.

“We tried a totally custom solution, but what we need are powerful out-of-the-box configuration features.”

- Treb Gatte, Tumble Road, LLC.
Information overload: The dark side of the data-driven enterprise

Users often find themselves in a sea of information that isn't relevant to them or the tasks they're working to accomplish. Too much "noise" can cloud visibility and get in the way of effective problem solving. The challenge is to balance ubiquitous access to data with intuitive user experiences.

Administrators want the ability to configure their tools to the unique needs of their organization and each individual team using them, so that every user can balance visibility with efficiency.

Blueprinting: Personalization that cuts through the clutter

To address this, CA has introduced "blueprinting." Blueprints are team-specific pages that are configured to show only the fields each team requires, and they also provide a way to easily configure the layout of the individual visuals and modules each team sees. Financial teams see only the data they need to access, as do IT teams, marketing teams, product development teams. Configuration happens through an intuitive a drag-and-drop interface—no coding or IT support required.
Blueprinting: Powerful configuration made simple

Create a project blueprint in minutes

1. Enter "edit" mode from a standard project
2. Add/delete and arrange data fields based on user needs
3. Select and configure visuals
4. Select and configure modules
5. Publish the page and notify the end user
6. End user fills out the selected fields
Theresa Robertson
Senior Project Manager

As a senior PM, Theresa is responsible for the end-to-end success of projects: initiation, planning, design, execution, monitoring, controlling and closure. She has to make sure everyone, from project teams to executive leaders stay informed and aligned. This involves creating and reading a lot of reports, which can be a source of inefficiency. It’s essential that she know exactly what’s going on with the project and that she has effective tools to distribute information and facilitate a modern way of working.

“I need to make sure the project stays on course and the team has the tools they need.”

Mike Jones
Team Member

Mike is ready to take on any project, and he likes to challenge himself by constantly learning and taking on multiple tasks at once. He’s always on top of his work, but he sometimes needs to jump in and out of different systems to get his tasks and record his progress on different initiatives, which keeps him from operating as efficiently as he’d like.

“I’m all about getting the day-to-day work done, no matter what.”
Theresa's pain points

**Reporting inefficiencies:**
Importing data from external sources

**Time on non-productive work:**
Interpreting and extracting meaning from reports

**Poor corporate processes:**
Data experts responding to requests

**Project setup:**
Providing only those capabilities that match the complexity or simplicity of the project

Mike's pain points

**Multi-tasking:**
Balancing multiple tasks, with different specifications & deadlines

**Inefficiency:**
Dealing with frustrations around processes & data requirements

With CA PPM

Theresa gets simplified onboarding and work management, and she’s able to surface insights to her executive team using their BI tool of choice. Mike gets embedded communication and collaboration tools that boost his efficiency and keep issues in the context of work.

They both get a more modern, intuitive set of tools for managing tasks and keeping the team aligned on their goals.
Team-Based task management

Tasks are important, but managing them—keeping track of which have been assigned, which have been completed, who has accepted them, and the status of each can be tedious, particularly for organizations executing non-agile projects. Users need clear, easy-to-use task management tools that support team engagement via more modern, social ways of working.

“One overlooked task can set a project back by days or weeks, increasing costs, delaying delivery and negatively impacting parallel projects.”
New feature: **Task boards**

Helping resource managers operate more efficiently and promoting transparency around task prioritization across the organization.

- A card can be created for each task
- Task cards reflect status changes
- Each card includes a to-do list
- Embedded collaboration enable task level discussion
- Visualize task dependencies and schedules on popular tools like Open Workbench, Gantt, and Microsoft Project
Modern businesses thrive on access and transparency.

Whether it’s financial data, project data, team utilization or task management, when today’s organizations need answers, they need them fast.

They can’t afford for that data to be gated by specialized expertise, unintuitive interfaces or disconnected tools. By giving all users the information they need to make the best decisions possible, CA PPM is setting the stage for them to move the business forward with confidence, speed and ingenuity.

Powerful, configurable and social

CA PPM 15.3 simplifies and streamlines the activities of project, financial and resource managers with powerful new features previously only available through third-party tools.

- Real-time financial analysis and forecasting without leaving the tool
- Familiar, Microsoft Excel-like functionality with embedded collaboration tools
- Embedded BI capabilities promote transparency and streamline reporting
- Secure data connection enables seamless integration between PPM/BI tools
- Blueprinting features provide focused, fully configurable project capabilities and information views
- Team-based task management boards support a more modern, social way of working
**CA PPM 15.3**

See what a complete modern PPM platform can do for your business

Many of the largest, most successful organizations in the world use CA Project & Portfolio Management (CA PPM), giving us a unique perspective on how different people in different roles across the modern enterprise are turning their data into a business advantage.

With the latest release (15.3), we’ve focused specifically on making project, financial and resource management more intuitive. Our embedded BI capabilities are promoting transparency, efficiency and security in reporting at all levels of the organization, because knowing exactly where a project is—and where it’s headed—are essential for success in today’s fast-moving markets.

Learn more about how CA PPM can help your business bridge the gap between insight and action.

[ca.com/ppm](http://ca.com/ppm)