

# CA Project & Portfolio Management Upgrade Services



## At a Glance

CA Project & Portfolio Management (CA PPM) Upgrade Services help organizations transition from a prior release of CA PPM to the current release. They consist of a detailed upgrade assessment and the actual solution upgrade. These may be contracted and performed together or separately.

The assessment identifies risks and benefits that impact technical and business stakeholders and develops a tailored upgrade strategy for your organization. Working with your staff, the team also evaluates opportunities to improve processes and solution performance.

The solution upgrade is designed to implement the current CA PPM release in a manner that captures your deployed features and options, which will reduce the work required of your team while accelerating your transition to the current release.

### Key Outcomes

- **Reduce risks and expose opportunities for innovation.** Gather key information to develop a well-founded upgrade approach.
- **Prepare your organization.** Accelerate the transition to drive solution adoption.
- **Unlock greater value from CA PPM.** Implement the solution and evaluate opportunities to improve business processes and overall solution performance.

### Key Services Features

- **Pre-Meeting Work.** To gather foundational data such as CA PPM usage data and environment information in preparation for the on-site Assessment Workshop led by CA Services.
- **Assessment Workshop.** To exchange and analyze data with CA Services, filling gaps in discovery for a more comprehensive upgrade plan.
- **Analysis.** To synthesize detailed findings into cohesive upgrade strategy which includes estimates for the time and effort required to achieve desired outcomes.
- **Solution Upgrade.** Implement the current release of CA PPM following a proven methodology tailored for your organization.

## Business Challenges

Transitioning to a new version of a solution often takes a lower priority for business and IT stakeholders than daily operations and other initiatives. Organizations may be challenged to devote the necessary resources, gather the relevant data and prepare an upgrade plan that addresses the risks and benefits of the upgrade. This can delay important product enhancements and fixes as well as impact the overall solution adoption if the transition is difficult.

**Gathering relevant data to prepare for an upgrade** can be time consuming and inconsistently executed by staff focused on other initiatives resulting in data gaps and potential errors.

**Narrow preparation scope**, limited to the mechanics of an upgrade, can miss valuable opportunities to assess processes, evaluate usage and utilize new solution enhancements.

**Operational risk and interruption** unnecessarily increases upgrade costs which can put projects and programs in jeopardy.

## Offering Overview

CA PPM Upgrade Services provide an efficient approach to assess risks and opportunities associated with upgrading your solution and to perform the actual upgrade. This model allows you to decouple the planning and design phases from execution to provide flexibility for scheduling, staffing and work required to improve readiness prior to transitioning to the current release.

CA Services will work with your team to gather important data about your business needs, your current implementation and adoption of CA PPM as well as the supporting IT infrastructure. The process segments and analyzes these findings to deliver an end-to-end upgrade strategy tailored to your specific needs.

To proceed with the actual upgrade, the team incorporates these findings and recommendations into an upgrade plan to transition from a prior version of CA PPM to the current version. These services also help to discover ways to derive additional value from CA PPM through better product usage and increased utilization of functions that can benefit your organization. Recommendations will cover a wide range of areas such as ways to improve solution performance and business processes through the support of new solution enhancements.

## Upgrade Strategy

The upgrade strategy is developed from detailed data that spans the following eight aspects of your current implementation. These aspects are analyzed independently and in aggregate to define the approach and make recommendations minimizing risk. This allows the team to gain insight into how your organization currently utilizes CA PPM to provide an estimate of time, effort and value to improve in these areas.

1. Business processes
2. Functional enablement
3. Customizations, configurations and integrations
4. Documentation and training
5. Infrastructure
6. Application performance
7. Data management approach
8. Organizational usage and solution adoption

The assessment also delivers a well-researched view of your existing CA PPM system and processes as well as their ability to support the initiatives and goals of the business. CA Services will assess and rate key aspects of your organization, processes, technology and architecture that commonly affect an organization's ability to achieve their business objectives.

### Pre-Meeting Work.

- Allows organizations to engage the right resources to gather data over time—limiting business disruption and improving data quality
- Prepares organizations for a highly productive Assessment Workshop

### Assessment Workshops.

- Provides a forum for CA Services and your staff to jointly assess, discuss and challenge data findings and pursue additional detail to develop a strong plan
- Segments and analyzes data regarding roles, usage, technology available, workaround assessments and performance benchmarking

### Analysis and Report of Findings

- Evaluates upgrade readiness, hardware and software requirements, resource availability, skills gaps, education needs, assumptions and risks
- Explores current approaches that can be improved, customizations which may no longer be required, business impact of changes and how the current release of CA PPM may help improve business processes
- Aggregates high-level understanding of estimated scope and schedule

## Solution Upgrade

- Performs the technical solution upgrade by installing CA PPM and enabling product capabilities prioritized during the upgrade workshops

Activities include:

- Preparing the environment
- Upgrading the solution
- Installing and enabling Advanced Reporting and the data warehouse, performing a preproduction health check and validating the system before go-live

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

CA Services is committed to your success, from managing the technology solutions you have now to helping you manage the technology decisions for your future. We lead with experience from thousands of engagements to deliver business value quickly, help you navigate complex business and technology challenges, and provide exceptional support throughout the entire solution lifecycle. Our experience is your advantage, with best practices that enable organizations to plan, manage, develop and secure complex IT environments. CA Services provides the unsurpassed expertise you demand to select, implement and run your enterprise IT solutions with confidence.

CA Technologies (NASDAQ: CA) creates software that fuels transformation for companies and enables them to seize the opportunities of the application economy. Software is at the heart of every business, in every industry. From planning to development to management and security, CA is working with companies worldwide to change the way we live, transact and communicate – across mobile, private and public cloud, distributed and mainframe environments. Learn more at [ca.com](https://ca.com).