

CA PPM 15.3: Powerful, Configurable and Social

The latest version of CA Project & Portfolio Management facilitates core financial activities with the ease and familiarity of a spreadsheet.

Two years ago, CA began to reevaluate how organizations were leveraging their project and portfolio management solutions. Our goal was to identify ways CA Project & Portfolio Management (CA PPM) could better serve every user, from project, resource and financial managers to executive decision makers and team members.

An extensive ethnographic study followed, indicating that existing project management tools not only failed to facilitate projects, but in some cases impeded them. And users, justifiably interested in the path of least resistance, either avoided the tools altogether or worked outside them to perform job functions. They used spreadsheets to work with the data, chat tools to communicate, collaboration apps for planning, and they exported data into third-party tools to create reports.

As a result of this research, CA embarked on a mission to reinvent our solution and since then, we've released several new versions of CA PPM, each one focused on a specific population of users.

CA PPM 15.3 simplifies the job of the financial manager with Microsoft Excel®-like functionality, embedded communication and collaboration features, and direct links to the industry's most popular reporting and business intelligence tools. Today, CA PPM provides financial managers with the ability to visualize, manage and take advantage of data like never before—all from inside the solution.

Simplified financial management

It's not unusual for organizations to manage millions of dollars within their project and portfolio management tools. 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. Today, many financial managers export data into Excel to better visualize it and make adjustments. But exporting that data is both cumbersome and prone to error.

CA PPM's financial planning pages have been redesigned to mimic Excel spreadsheets both in functionality and visual representation. This new, familiar style provides visibility deep into projects without requiring additional learning, reconfigurations or multiple reports.

Financial transparency: planned, forecast and actuals

In the new CA PPM, the financial manager starts at the project dashboard, where tiles graphically illustrate individual projects. These tiles contain high-level project details and are configurable, so each is relevant to the user. Clicking on a tile provides access to the financial details associated with that project. From there, users can easily oscillate between any of four financial views:

- **Planned:** The plan of record that illustrates anticipated financials assigned at the beginning of a project.
- **Planned to Actuals:** Provides the data necessary to monitor the health of an ongoing project by contrasting planned expenses with actual expenses to date.
- **Plan to Forecast:** Allows users to easily view and manage the burn rate by contrasting planned expenses with current expense forecasts. A forecast that's been updated significantly above plan indicates actuals are coming in higher than expected, and that an issue should be addressed to keep the project on track.
- **Actuals:** The total spend at the end of the measurement period or upon completion of an activity.

Inside each view, managers can set monthly, quarterly or annual intervals depending on the time horizon they're interested in, and they can leverage an array of features designed to help them navigate the numbers with ease:

- **Color-coded column headers** make it easy to locate and compare like information. A color-coded legend can be used to hide or display corresponding columns with the click of a button.
- **Column pinning provides** Excel-inspired freeze-frame technology that keeps pinned columns static as the user scrolls across time horizons.
- **Filtering** is provided via a search mechanism that allows users to minimize the visual field and quickly get to the financial data they need without having to run reports or export data.
- **Cut and paste** can be used to insert CA PPM data into a spreadsheet, if required.
- **Drag-and-drop functionality** allows for an easy pivot from one subcategory to another.

CA PPM allows managers to easily sort information by dragging and dropping category headers. They can also drill down into subcategories to see specific financial details associated with each.

Figure 1.
Excel-like functionality

CA PPM makes managing critical financial information easier with multiple viewing options, Excel-like functionality and the ability to drill down into the details.

		2017-06				2017-07				TOTALS			
Transaction Class	Cost Type	Planned	Forecast	Variance	% Variance	Planned	Forecast	Variance	% Variance	Planned	Forecast	Variance	% Variance
		13,800	20,850	(7,050)	(51%)	99,500	21,500	78,000	439,660	329,490	110,170	25%	
External Labor	Capital	0	0	0	0%	0	0	0	107,100	99,885	7,215	7%	
	Capital	0	0	0	0%	0	0	0	107,100	99,885	7,215	7%	
Internal Labor	Capital	13,800	20,850	(7,050)	(51%)	9,500	21,500	(12,000)	242,560	229,604	12,955	5%	
	Capital	4,000	8,640	(4,640)	(116%)	8,000	13,120	(5,120)	121,440	113,707	7,733	6%	
	Capital	0	0	0	0%	0	3,900	(3,900)	68,700	70,073	(1,373)	(2%)	
	Capital	4,000	4,800	(800)	(20%)	0	4,480	(4,480)	15,200	12,160	3,040	20%	
	Capital	0	0	0	0%	0	0	0	28,800	25,135	3,665	13%	
	Operating	1,600	1,920	(320)	(20%)	0	0	0	1,600	1,920	(320)	(20%)	
	Operating	0	1,650	(1,650)	0%	1,500	0	1,500	1,500	1,650	(150)	(10%)	
	Operating	4,200	3,840	360	9%	0	0	0	5,320	4,960	360	7%	
Software	Capital	0	0	0	0%	90,000	0	90,000	90,000	0	90,000	100%	
	Capital	0	0	0	0%	90,000	0	90,000	90,000	0	90,000	100%	

Review financial transactions, drill down into costs

For managers, understanding variances can be a challenge. With CA PPM, users can click on any figure in the actuals category to see every transaction that has contributed to the total number. This full visibility into actuals and the ability to drill down into details helps to quickly spot issues like contractor overcharges or misdirected costs.

If a manager needs to reconcile divergent timesheet information, with a click they can see each weekly timesheet that contributes to the total amount and identify the specific causes of the variance. This information at the user's fingertips removes the need for a data expert to conduct a transaction review.

Similarly, a manager looking at a cost plan might see \$35,000 in actuals where the plan anticipated \$20,000. To identify the reason for the overage, the manager simply has to click on the line item to see all the individual transactions that made up the \$35,000 total. The manager may then pivot back to the forecast to see if the overage can be absorbed or if a course correction is required.

Additional Features in 15.3

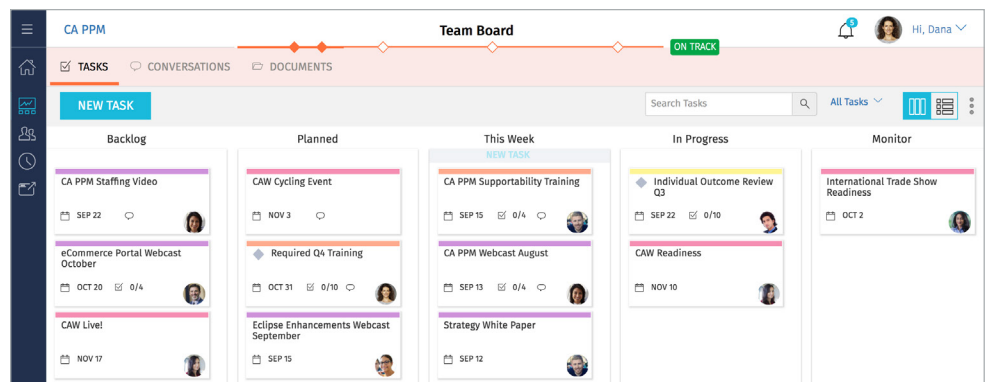
Team-based task management

One overlooked task can set a project back by days or weeks, increasing costs, delaying delivery and negatively impacting parallel projects. 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.

Figure 2.

Team boards

Task boards highlight activities, target completion dates and current status to simplify and streamline task management.



CA PPM includes a task board that draws on popular consumer app-style graphics. A card can be created for each task and used to illustrate status. As status changes, task cards reflect that. Each card includes a to-do list that shows what activities must be completed to accomplish the task.

Team members can discuss the status of the work at the task level through a text box that allows for collaboration within the tool. Managers with major projects that require the power of a scheduler also have the option to visualize task dependencies and schedules on popular desktop scheduling tools such as Open Workbench, Gantt and Microsoft Project®.

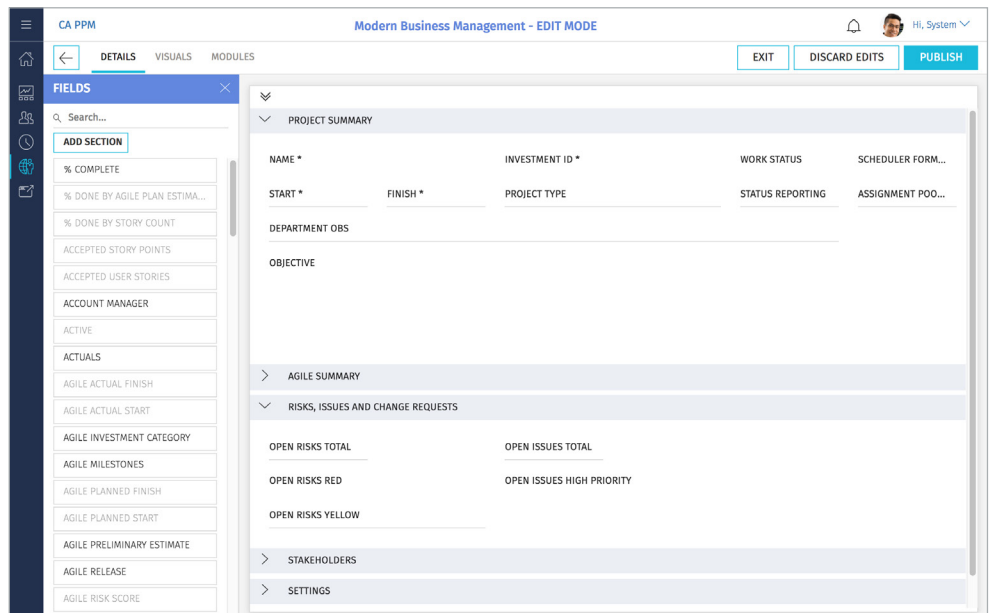
Blueprinting removes extraneous information

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.

To address this, CA has introduced "blueprinting" (partitioning). Blueprints are team-specific pages that are populated with only the custom fields each team requires. IT teams see only the data they need to access, as do marketing teams, product development teams, etc.

Figure 3. Quick Templates

Departments can customize blueprints to include only relevant content and to store documents like quick-start templates to help launch projects more quickly.



Consolidated access to project collateral

Team members typically visit a number of different websites to find the information they need. And many team members are not dedicated to one project but frequently rotate between many, each with their own knowledge sites. As a result, project managers spend too much time responding to the same requests for information, over and over again.

With CA PPM, these links can be collected in one central location to provide universal access to everything team members need. This collection of knowledge sites helps new team members hit the ground running, prevents them from having to ask the same questions multiple times and frees the PM to focus on more important issues.

Trending: the first step toward predictive analytics

Every project comes with risk, so monitoring indicators of success or failure is essential. Trending capabilities allow users to predict project success or failure by monitoring operations over time. This alerts managers to projects trending in the wrong direction far earlier and with a much higher rate of accuracy so that course corrections can be made before it's too late.

Businesses are especially interested in the number of issues and disturbances as a project nears completion. As a product release approaches, for example, project managers need to ensure that outstanding issues and dependencies are being addressed and resolved. Trending illustrates this.

Because most solutions only provide real-time status reports, to gain a clear picture of trends, organizations must build and execute multiple custom jobs. The industry-unique CA PPM data warehouse tracks changes over time, which enables companies to use past trends as a predictor of future performance without the need for customization to capture the data. CA PPM tracks and stores this information so that users can understand how their projects are progressing at any given time.

Self-service business intelligence

The right data warehouse can provide a significant competitive advantage. But because they're built to process copious amounts of data, traditional business intelligence (BI) tools that mine them must use complicated data models to decipher the information within. And that's costly. According to BI expert Treb Gatte, "A typical department spends an average of 1,600 hours per year generating ad-hoc reports, 70 percent of which are spent writing queries and cleaning up suboptimal data." As a result, businesses today are looking to combine mature, optimized data warehouse solutions with contemporary BI tools that are interactive, incorporate simplified dashboards and provide anytime, anywhere access to information. Laid over a data warehouse, these BI solutions deliver data through a much less complicated process that reduces the need for data experts—which saves money. According to Gatte, "Optimized data and the right reporting tool can result in up to \$200,000 a year in savings."

CA PPM was designed for the easy extraction of information business users need for effective decision making. And now, CA PPM's powerful data warehouse combines with innovative BI tools like Jaspersoft, Power BI, Tableau and Qlik, or any solution with an OData connector, to provide extensive project, resource and financial information.

The result is self-service portfolio analytics supported by powerful data visualization capabilities, personalized dashboards with a 360-degree view of the business and a mobile device option built to facilitate meetings anywhere in the world with immediate real-time answers to project questions.

Powerful filtering and allocation features for the RMO

Beyond assisting the financial manager, CA PPM 15.3 also supports the resource management office (RMO) with improved staffing features and filters. Today, resource managers are typically limited to views of their own people, and most use spreadsheets to perform daily staffing activities. CA PPM provides organization-wide visibility, simplifies and formalizes the agreement between requesting and fulfilling managers, and minimizes the need to export data.

New resource management features include:

- Harvey Balls to identify soft-booked resources that require approval
- Colorization to illustrate over-allocation of resources
- Embedded communication options
- A familiar, easy-to-use Excel-like format

As with task management, resource managers can now collaborate from within the CA PPM tool, using the communication feature to conduct staffing negotiations. This feature allows for document attachments and embedded urls to further simplify the process of assigning resources.

CA PPM 15.3 has been redesigned to function as a light tool for smaller projects or a powerful tool for projects that require the full breadth and depth of a full-featured project and portfolio management solution. CA PPM 15.3 simplifies and streamlines the activities of financial and resource managers with powerful new features they previously exited the tool to use. And CA PPM provides unprecedented access to information that makes data available to everyone, minimizing the need for data experts.

For more information, please visit ca.com/PPM



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