

CA Project & Portfolio Management

CA PPM

Reconstructing resource management tools to simplify tasks, drive collaboration and facilitate action

Executive Summary

Challenge

People who use technologies at home expect the same ease of use and intuitiveness for the tools they use in the workplace. But enterprise tools aren't keeping up with the pace of change. Many product and portfolio management (PPM) solutions force resource managers to create entire workflows or navigate through multiple screens just to see the fundamental component of resource management—what their people are working on. Resource managers also cite shortcomings such as no simple way to perform everyday tasks, communicate in context with others, drill down into key information, narrow the field of resources and forecast financials and model outcomes.

Opportunity

We've redesigned our CA Project & Portfolio Management (CA PPM) solution to provide resource managers with real value, while keeping these four truths top-of-mind:

- Staffing isn't just an approval process—it's a collaborative negotiation.
- Complex searching algorithms designed for resource management are largely useless.
- The key to solving the most common staffing issues is pinpoint focus.
- As with everything in today's app economy, everyday tasks should be fast, easy and intuitive.

Benefits

Our new CA PPM solution provides resource and project managers with a single source of information—truth—for all types of projects, regardless of who's managing them, what departments they're in or what teams are involved. One solution to manage every type of project.

Centralized Visibility for Simplified Staffing

Information about how people are being allocated across the enterprise should be at your fingertips. That starts with one, consolidated view from which resource managers can understand the activities of all their people and all the work in the queue.

Managing resources from a central location is a cornerstone of PPM. Through it, managers can perform nearly every function associated with their jobs. Drill down to see which specific projects each employee is working on as well as each one's current allocation percentage. Easily switch from a people view to a projects view and back again to clearly understand how they're intertwined and to evaluate interdependencies. Get alerted to staffing requests requiring approval, and evaluate each request in relation to what other team members are scheduled to work on. Explore adjustments that might better suit the organization with a Microsoft® Excel®-like paradigm that feels comfortable to them on day one.

PPM provides a simple way to request and approve resources without having to launch workflows or deal with requisitions. Intuitive, simple and very visual—no complex navigation required.

FIGURE 1.

Resource**management:**

Managing resources from a central location is a cornerstone of CA PPM.

CA PPM										
Feb 1, 2017										
Resources Investments										
Select Filters										
		2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08	2017-09	TOTALS
		FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE
×	PINNED (0)	ALL	10.00	9.85	9.20	9.00	8.40	8.15	7.95	7.73
										8.67
>	Andy Cooper	0.90	0.80	0.65	0.65	0.65	0.50	0.50	0.50	0.80
>	Brian Robinson	0.70	0.70	0.70	0.70	0.65	0.65	0.65	0.65	0.63
>	Diane Durand	1.00	1.00	1.20	1.20	0.80	0.80	0.60	0.60	0.84
>	Drew Davis	0.70	0.70	1.20	1.20	1.10	1.00	1.00	0.80	0.92
>	Hank Fisher	0.85	0.85	0.65	0.55	0.50	0.50	0.50	0.50	0.60
>	Mike Jones	0.90	0.90	0.90	0.80	0.80	0.80	0.80	0.60	0.75
>	Paul Pryor	1.00	1.00	0.70	0.70	0.70	0.70	0.70	0.98	0.84
>	Peter Phillips	1.00	0.95	0.70	0.70	0.70	0.70	0.70	0.60	0.72
>	Ray Fowler	0.95	0.95	0.50	0.50	0.50	0.50	0.50	0.50	0.58
>	Sid Patel	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
>	Tim Thone	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Requests										
Select Filters										
		2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08	2017-09	TOTALS
		FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE
		1.00	2.00	3.20	1.40	1.40	1.40	1.40	1.40	1.62
>	Business Architect	0.50	1.00	1.30	0.40	0.40	0.40	0.40	0.40	0.57
>	QA	0	0	0.30	0.30	0.30	0.30	0.30	0.30	0.23
>	SW Engineer	0	0	0.30	0.40	0.40	0.40	0.40	0.40	0.30
>	Systems Analyst	0.50	1.00	1.30	0.30	0.30	0.30	0.30	0.30	0.51

Financial Forecasting and Modeling

While typically not offered in resource management tools, financial forecasting is an important component of resource planning. CA has added this capability to allow resource managers to model plans to meet budgets, and to map headcounts to business initiatives. Users have the option to view resources and how they tie into investments, or to flip it and see investments and how each individual ties in.

By applying a rate to each resource, users can perform financial modeling scenarios from an allocations perspective. When headcount costs are pushing a project over budget, managers can easily explore alternatives. They may find, for example, that a resource in Prague, Czech Republic, is cheaper than one in the U.S., and can insert that rate to evaluate its impact on the forecast. These financial capabilities automatically feed into the overarching business forecasts.

By integrating forecasting into resource planning, organizations enable enterprise agility. Enterprises can't pivot to respond to competitive threats unless they understand what their people are working on, how much that's costing them and how they can impact those costs by adjusting variables.

FIGURE 2.

Financial forecasting:

By applying a rate to each resource, users can perform financial modeling scenarios from an allocations perspective.

	2017-02		2017-03		2017-04		2017-05		2017		TOTALS	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
PINNED (3) ALL	10.00	202,720	9.85	230,000	9.20	192,320	9.00	215,464	8.41	8.11	1,822,084	
> Andy Cooper	0.90	17,280	0.80	17,664	0.65	12,480	0.65	14,352	0.6	0.61	122,824	
> Brian Robinson	0.70	16,800	0.70	19,320	0.70	16,800	0.70	19,320	0.6	0.59	153,300	
> Diane Durand	1.00	13,440	1.00	15,456	1.20	23,040	1.20	26,496	0.8	0.87	168,384	
> Drew Davis	0.70	13,440	0.70	15,456	1.20	23,040	1.20	26,496	1.1	0.86	178,848	
> Hank Fisher	0.85	21,760	0.85	25,024	0.65	16,640	0.55	16,192	0.5	0.55	153,600	
> Mike Jones	0.90	21,600	0.90	24,840	0.90	21,600	0.80	22,080	0.8	0.72	188,400	
> Paul Pryor	1.00	25,600	1.00	29,440	0.70	17,920	0.70	20,608	0.7	0.66	184,688	
> Peter Phillips	1.00	16,000	0.95	17,480	0.70	11,200	0.70	12,880	0.7	0.68	118,680	
> Ray Fowler	0.95	15,200	0.95	17,480	0.50	8,000	0.50	9,200	0.5	0.56	97,000	
> Sid Patel	1.00	16,000	1.00	18,400	1.00	16,000	1.00	18,400	1.0	1.00	173,600	
> Tim Thone	1.00	25,600	1.00	29,440	1.00	25,600	1.00	29,440	1.0	1.00	277,760	

	2017-02		2017-03		2017-04		2017-05		2017		TOTALS	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
> Business Architect	0.50	12,000	1.00	22,600	1.30	31,200	0.40	11,040	0.40	0.61	159,960	
> QA	0	0	0	0	0.30	4,800	0.30	5,520	0.30	0.31	53,680	
> SW Engineer	0	0	0	0	0.30	7,680	0.40	11,776	0.40	0.27	75,568	
> Systems Analyst	0.50	9,600	1.00	22,080	1.30	24,960	0.30	6,624	0.30	0.55	115,296	

Communication. Negotiation. Collaboration.

While resource staffing is often thought of as a straightforward process, it's not. As resource managers can attest, staffing people isn't as easy as searching for the right skills. While skillsets are a key factor, each assignment comes with multiple, additional conditions such as when the person is needed, when they're available and how **not** having them could impact business deliverables.

Staffing resources requires collaborative negotiation because your best people are inevitably in high demand. To secure the best talent at the optimal time, you must communicate, negotiate and collaborate **in context**, from within the resource management tool.

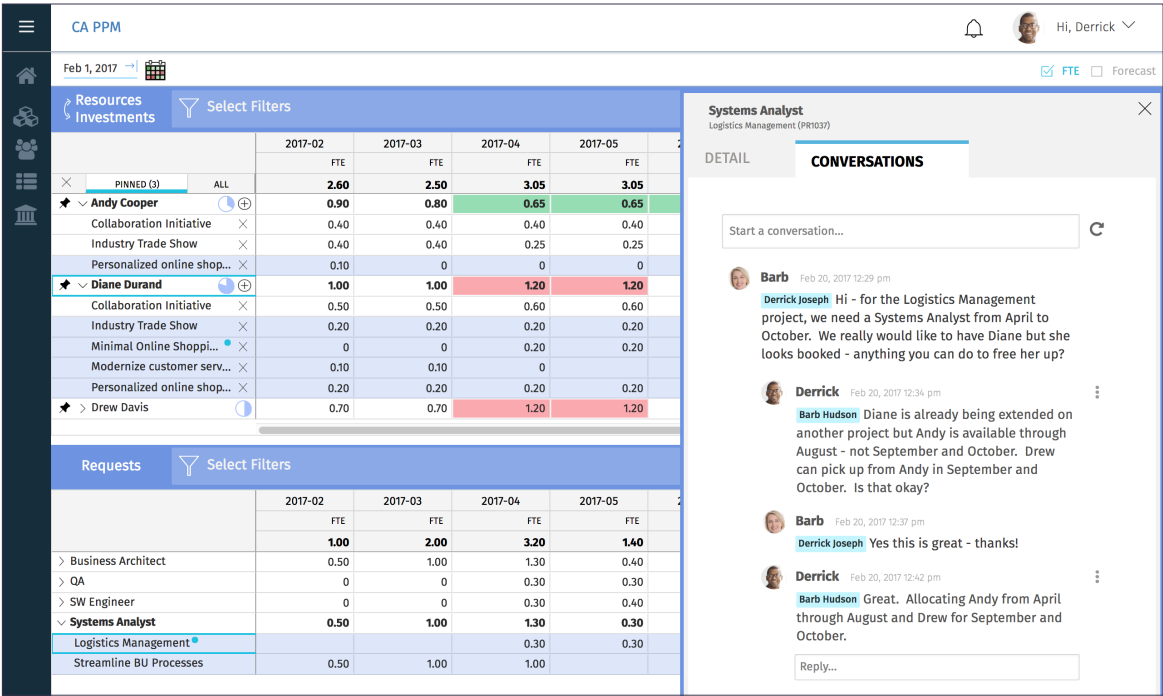
CA has incorporated a social collaboration tool as a central element of its PPM solution. Users can communicate about any number of related topics and get quick answers, without leaving the tool. When information is required from someone outside the conversation, an @mention notification can be sent through both the browser or via email. With a click, the recipient is presented with details of the conversation and can respond directly through the notification.

This new feature allows users to address any number of challenges by communicating in context with other stakeholders who may be able to assist. Together, they can evaluate the problem, explore options to address it and take immediate action.

Using CA PPM, a project manager sees that Diane's not available during the week she's needed for a high-priority project, but she is available the following week. The situation can't be resolved through workflows or complex searching algorithms—negotiation is required.

Through the tool, the PM asks the resource manager if Diane can be reassigned. They find that while Diane is hard-booked, Andy is available and, after a dialogue, they agree that he has the appropriate skillset. The PM agrees to use Andy, books him and moves on—no phone calls, emails or hallway conversations required. Embedding collaboration as part of the process makes for a powerful solution.

FIGURE 3.
Collaborative negotiation:
Staffing resources requires collaborative negotiation.



Adaptive Project Management Also Requires Collaboration

The recent trend toward ad hoc project management has noticeably impacted the market. Where traditional project managers were formally trained and PMI-certified, ad hoc managers are less traditional, tending to focus almost exclusively on delivery over process.

As a result, a far more intuitive project management solution that focuses on in-context communication, increased productivity and results is essential. As with resource management, CA has delivered a project management collaboration feature designed to meet these new requirements.

Collaboration isn't just a tool to send messages; it's a method of maximizing the intellectual capital inside your organization and ensuring agility, driving creativity and enabling the delivery of innovation to the market.

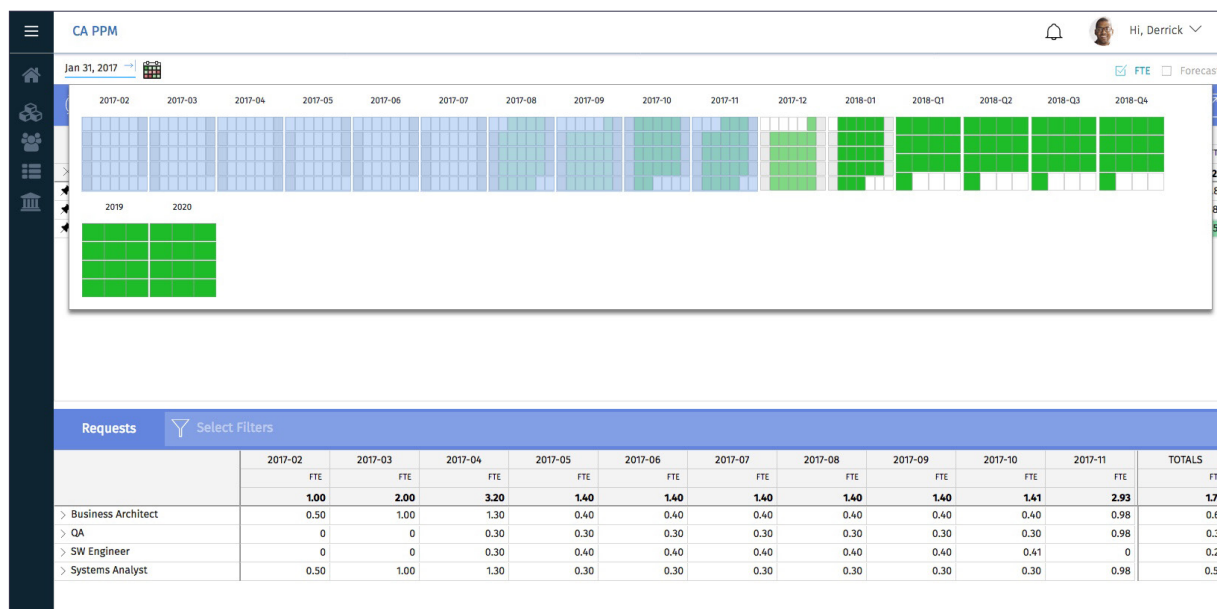
Finding the Right People at the Right Time

Many vendors offer search tools meant to help resource managers filter their way to the perfect candidate with the perfect credentials—but these tools rarely perform. There are simply too many variables and too many extenuating circumstances for filters to do the job.

FIGURE 4.

Resource telescoping:

Quickly identify the best candidates with the availability and skillset for the job.



Solve Big Problems With a Narrow Focus

All planning isn't the same. Resource managers tend to plan in a granular fashion near-term and with a more expanded view in the future. CA PPM's planning timescales feature allows managers to define their own short, medium and long-term planning horizons. Whether managers choose to track resource issues on a weekly basis in the near term, a monthly basis in the medium term and a quarterly basis in the long term, as they navigate these time periods, staffing issues like resource bottlenecks are clearly highlighted.

Once aware of an issue, users telescope down into these periods for more granular information about a specific problem. A narrowed timescale also provides clarity in terms of which candidates have availability to help solve the problem. For example, in the process of planning for the coming quarter, a manager finds a resource issue while viewing the medium-term planning horizon. By telescoping down from the bigger picture into the specific period, they can see that an employee is over-allocated. Viewing the entire team during that timeframe, the manager can see who's under-allocated and then ascertain whether or not they have the right skillset to take on additional

workload. Here, drag-and-drop load balancing can be used across the team to test different scenarios, and ultimately, reassign projects—no workflows or multiple screens necessary.

PPM gives managers a way to visualize future resource issues and provides a simple method of solving them, long before a staffing crisis strikes.

Telescoping allows resource managers to plan the way they actually plan: with granularity in the near term and a broader brush in the longer term.

Pinpointing the Problem—and the Solution

Pinning is another feature designed to help resource managers address staffing issues. Many times, the staffing problem and possible solution are visually very far away.

Here's a scenario: Andy may have too much work on his plate while Drew is freeing up next week. In an alphabetical list, these people could be several pages away from one another. But, after applying the telescoping feature to narrow the view to the target timeframe where a problem exists, use a pinning capability to isolate and compare candidates. Pin Andy and Drew, and everyone else vanishes; this places the focus on just the right timeframe and just the right people to solve the problem. Once a staffing issue is identified and the pinning feature has narrowed the visual field, managers can use simple Excel-like tools to balance the work between these two people.

Similarly, imagine that a resource manager requests an architect during a specific timeframe. Rather than search through a team of dozens or hundreds looking for the right credentials, the manager can pin only the two or three available architects, pull them into a separate view and from there, more easily evaluate them. It's much easier to work with a minimized field.

With a pinning capability, resource managers can focus on the problem, single out and evaluate potential solutions and take quick action.

FIGURE 5.

Resource pinning:

Pinning is the process of isolating specific candidates..

	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08	2017-09	2017-10	2017-11	TOTALS
FTE	2.65	2.65	2.90	2.90	2.40	2.40	1.90	1.90	1.60	1.60	2.29
> Diane Durand	1.00	1.00	1.20	1.20	0.80	0.90	0.60	0.60	0.70	0.70	0.87
> Drew Davis	0.70	0.70	1.20	1.20	1.10	1.00	0.80	0.80	0.60	0.50	0.86
> Ray Fowler	0.95	0.95	0.50	0.50	0.50	0.50	0.50	0.50	0.30	0.40	0.56

	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08	2017-09	2017-10	2017-11	TOTALS
FTE	1.00	2.00	3.20	1.40	1.40	1.40	1.40	1.40	1.41	2.93	1.75
> Business Architect	0.50	1.00	1.30	0.40	0.40	0.40	0.40	0.40	0.40	0.98	0.61
> QA	0	0	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.98	0.31
> SW Engineer	0	0	0.30	0.40	0.40	0.40	0.40	0.40	0.41	0	0.27
> Systems Analyst	0.50	1.00	1.30	0.30	0.30	0.30	0.30	0.30	0.30	0.98	0.55

Keep It Easy With a Familiar Interface

Resource management needs to be easy, so it should employ a familiar interface that doesn't require multiple cycles to learn. Many organizations are familiar with and already use Excel to track resources, so CA has designed a tool that features an Excel-like interface with functionality that allows users to cut, copy and paste allocations between time ranges or investments. Projects can be staffed with drag-and-drop functionality, and managers can hit the ground running.

360-Degree Visibility for the Agile Business

Today's enterprise needs the ability to rapidly respond to changing market conditions. That requires real-time visibility into exactly where each project stands in business terms. CA's integration of CA Agile Central (formerly Rally) and CA PPM provides holistic visibility across the entire project spectrum, from ideation to delivery.

Data consolidated from across the enterprise eliminates the confusion that comes when business users lack visibility into the projects they're funding. Now, in real time, they can evaluate how teams are completing projects, see what people are working on, identify when funding requirements change and be alerted to issues that might impact projects.

What CA PPM customers gain from CA Agile Central	What CA Agile Central customers gain from CA PPM
<ul style="list-style-type: none">• Software capitalization• Portfolio visibility• Single funding model• Budgeting management• Head count visibility• Execution ROI• End-to-end enterprise reporting	<ul style="list-style-type: none">• Removal of the reporting tax• Team transparency to business strategy• Visibility across workspaces• Agile scaling within an enterprise• Mitigation of risks of agile development• Removal of disconnects• Prevention of double reporting and answering agile-value-type questions

CA PPM + CA Agile Central = Cross-Functional Value

For resource, finance and project managers, this integration delivers real value.

The PPM time management module integrates directly into the CA Agile Central user experience to capture data at the point of work, so PMs manage their portfolios with more accurate data (while developers save many hours typically spent filling out timesheets). This helps PMs manage budgets better and get visibility into the contribution of agile initiatives to the portfolio for end-to-end enterprise reporting.

Learn more about how CA PPM can benefit your business. Visit ca.com/ppm

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