

# CA Clarity™ PPM

## PMO Accelerator Release Notes

v3.0.00



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# Chapter 1: Welcome to PMO Accelerator

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Welcome to the CA Clarity PMO Accelerator v3.0 add-in (PMO Accelerator) release notes. This add-in is based on CA Clarity Project & Portfolio Manager (CA Clarity PPM) v13.0.00. This document can help you get started with this add-in.

## What's New in v3.0

The following new features and enhancements are available with this version:

- Consistent look-and-feel for portlets throughout CA Clarity PPM. Field names and column layouts are consistent across portlets. The following are some examples:
  - EAC cost is calculated using the same rules on all portlets as on project management pages.
  - The Properties icon is the first column on several portlets and list views. The icon links you to the properties page of the object (for example, project or resource).
  - The Settings subpage is consistently defined across projects, programs, non-project investments, resources, and portfolios allowing segregation of access through sub-page level security.
- View protection when installing the new version of PMO. See [View Protection](#) (see page 11) for details.
- Visibility to the following key project indicators:
  - Schedule and Schedule%
  - Days Late and Days Late%
  - Projected Cost Variance and Projected Cost Variance %
  - Projected Effort Variance and Projected Effort Variance %
- Portlet queries updated to support latest ANSI standards, better performance, and support for the same cost calculations as available in CA Clarity PPM.
- New and enhanced Portlets. See [New and Improved Portlets](#) (see page 9) for a list of these portlets.
- New attributes such as Schedule% and Days Late% included on all portlets that have the Schedule and Days Late indicators.
- Several enhancements to projects as follows:
  - Projected Cost and Effort Variance indicators are available.
  - New Actions menu options are available that provide the following:
    - Visibility to all timesheets associated to a project from the Project Team tab.
    - Visibility to all posted financial transactions from the Project Financial Plans tab.
  - Project Manager Schedule Dashboard portlet now includes subprojects.
  - Project Manager Cost and Effort Dashboard portlet now includes subprojects in the hierarchical list.
  - Earned value cost and effort-related fields are available as configurable for all portlets.

- Full localization support in 16 languages.

## New and Improved Portlets

The following portlets were enhanced or added in v3.0. See the *PMO Accelerator Product Guide* for detailed descriptions of these portlets:

Portlet Name	Enhanced	New
Actuals by Transaction Type	x	
Balance	x	
Capital vs Expense Budget and Forecast	x	
Capital vs Expense by Period	x	
Capital vs Expense Variance by Period Variance by Period	x	
Cost and Effort Performance	x	
Cost and Schedule Overview	x	
Current Issues	x	
Current Issues Listing	x	
Earned Value Analysis by Phase	x	
Financials	x	
Investment Gantt	x	
Investment Timesheet Review		x
Investment Timesheet Summary	x	
Investments	x	
Issue Management	x	
Issues by Priority	x	
Issues Listing		x
Key Performance Indicators	x	
Late Tasks and Milestones	x	
Milestones	x	
My Portfolios	x	
Overview Portfolio Filter		x

Portlet Name	Enhanced	New
Overview Program Filter		x
Overview Project Filter	x	
Overview Sponsor Filter		x
Pending Estimates Review	x	
Portfolio Role Capacity and Demand	x	
Posted Transaction Review		x
Prioritization of Investments [--Base Scenario--]	x	
Prioritization of Investments [--Compare To Scenario--]	x	
Project Analysis	x	
Project Baselines	x	
Project Costs by Resource	x	
Project Costs by Task	x	
Project Indicators	x	
Project KPIs by OBS	x	
Project Manager Cost and Effort Dashboard	x	
Project Manager Schedule Dashboard	x	
Project Planned Cost	x	
Project Schedule	x	
Resource Allocation	x	
Resource Capacity and Allocation	x	
Resource Demand on Investments [--Base Scenario--]	x	
Resource Demand on Investments [--Compare To Scenario--]	x	
Resource Utilization	x	
Resource Utilization Percentage by Month	x	
Risk Management	x	
Schedule and Progress	x	
Schedule Performance	x	
Staffing	x	

Portlet Name	Enhanced	New
Staffing Details	x	
Status Report Indicators	x	
Team Capacity	x	
Team Member Task Summary	x	
Timesheet Notes	x	
Timesheet Overview Filter	x	
Timesheet Review	x	
Upcoming Milestones	x	

## View Protection

If you previously used Studio to configure PMO Accelerator views, filters, or portlets, these configurations remain as-is. They are not overwritten by new or changed content during installation. You can decide whether to make manual changes to your existing configurations or to apply the new content.

See [Apply the Add-In](#) (see page 18) for information about how to apply the view changes installed by this add-in.

The following table shows all views that were modified in PMO v3.0. Use this information to decide whether to make manual changes to your existing views or to apply the new views.

Object Name	View	PMO v3.0
Application	Application Properties	
	Application List	x
	Application Filter	x
Asset	Asset Properties	
	Asset List	x
	Asset Filter	x
Assignment	Assignment Properties	x

Object Name	View	PMO v3.0
	Task Assignment List	x
Baseline	Baseline Revision Properties	x
	Baseline Revision List	x
	Baseline Revision Filter	x
Benefit Plan	Benefit Plan Properties	x
	Benefit Plan List	x
	Benefit Plan Filter	x
Benefit Plan Detail	Benefit Plan Detail Properties	x
	Benefit Plan Detail List	x
	Benefit Plan Detail Filter	x
Cost Plan	Cost Plan Properties	x
	Cost Plan List	x
	Cost Plan Filter	x
	Budget List	x
	Budget Filter	x
Cost Plan Detail	Cost Plan Detail Properties	x
	Cost Plan Detail List	x
	Cost Plan Detail Filter	x
	Budget Plan Detail Filter	x
GL Allocation	GL Allocation Debits Properties	x
	GL Allocation Debits List	x
	GL Allocation Debits Filter	x
	Standard Rule Debits Properties	x
	Standard Rule Debits List	x
	Standard Rule Debits Filter	x
GL Allocation Detail	Overhead Rule Detail Properties	x
	Overhead Rule Detail List	x

Object Name	View	PMO v3.0
	Overhead Rule Detail Filter	x
	GL Allocation Detail List	x
	Standard Rule Detail List	x
Idea	Idea Properties	
	Idea List	
	Idea Filter	
Other Work	Other Work Properties	
	Other Work List	x
	Other Work Filter	x
Portfolio	Portfolio Properties	x
	Portfolio List	x
	Portfolio Filter	x
	Portfolio Child List	x
	Portfolio Child Filter	x
Product	Product Properties	
	Product List	x
	Product Filter	x
Project	Project Properties	
	Project List	
	Project Filter	
	Program Properties	x
	Program List	x
	Program Filter	x
	My Projects	x
	Subproject List	x
	Subproject Selection Filter	x
	Project Templates Filter	x
	Project Release Filter	x
	Project Requirement Filter	x
Resource	Resource Labor Properties	x

Object Name	View	PMO v3.0
	Resource Equipment Properties	x
	Resource Material Properties	x
	Resource Expense Properties	x
	Role Labor Properties	x
	Role Equipment Properties	x
	Role Material Properties	x
	Role Expense Properties	x
	Resource List	x
	Resource Filter	x
	Select Resources List	x
	Resource Selection List	x
	Resource Finder List	x
	Department Resources List	x
	Select Resources Filter	x
	Resource Selection Filter	x
	Resource Finder Filter	x
	Department Resources Filter	x
Resource Credit	Resource Credit	x
	Resource Credit List	x
	Resource Credit Filter	x
Resource Credit Detail	Resource Credit Detail List	x
Service	Service Properties	
	Service List	x
	Service Filter	x
	Service Subscriptions	x
	Service Subscriptions List	x
	Service Subscriptions Filter	x
Task	Task Properties	x
	Task List	x

Object Name	View	PMO v3.0
	Task Filter	x
	Association Task List	x
	Gantt List	x
	Task Resource Utilization List	x
	Project Requirement Task List	x
	Select Task List	x
	Association Task Filter	x
	Gantt Filter	x
	Task Resource Utilization Filter	x
Team	Staff Member Properties	x
	Project Team Staff List	x
	Project Team Detail List	x
	Team Staff List	x
	Team Detail List	x
	Resource Allocations List	x
	Resource Allocations Detail List	x
	Team Selection List	x
	Project Team Filter	x
	Team Filter	x
	Resource Allocations Filter	x
	Resource Selection Filter	x

## Portlets No Longer Supported

The following subobjects and associated portlets have been removed from PMO Accelerator v3.0. If you are upgrading from an earlier version of PMO, you can continue to use these objects and portlets. However, they are longer supported.

- Program Management Plan subobject
- Project Scope Statement subobject
- Quality Attributes Project subobject
- Project Quality Attributes portlet

# Chapter 2: Upgrade Information

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## Review the Add-In Before Applying

Install the PMO Accelerator add-in on your CA Clarity application server so that the content is available to you. See the CA Clarity PPM *Installation Guide* for information about installing the PMO Accelerator add-in.

**Follow these steps:**

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-ins.  
The Add-Ins page appears.
3. Click the Accelerator: Program Management Office add-in (ID: csk).  
The Add-In Details page appears.
4. Review the changes to installed add-in items and new add-in items.

If you have previously configured views, the configurations are preserved and are not overwritten during installation. You can decide which new or updated views to apply. Use the details page of the add-in in Studio to select new or modified items and apply them. Applying a Studio object overwrites the existing configuration of the Studio object views.

For more information about how PMO Accelerator configures views, see the *PMO Accelerator Product Guide*.

The Studio Add-In Details page lists all of the items that are included with the add-in. The following fields display on the page:

**Name**

Indicates the add-in name in a hierarchical relationship determined by dependencies among the items.

### Status

Indicates if the add-in item is applied or not in CA Clarity PPM.

#### Values:

- Not Installed. New items that are new to the add-in version or that you did not apply from a previous add-in version.
- Upgrade Ready. Modified items that you applied from a previous add-in version and then configured. An update to the item is included in the current add-in version.

**Important!** Consider the configurations you have made to items before applying them. Applying modified items overwrites your configurations.

- Installed. Items that are installed.

### Type

Indicates the item type.

**Values:** Object, Lookup, Page, Tab, Portlet, Query, Custom View, Menu, Group, Project, Process, Role, and Report/Job

### ID

Displays the add-in item code, which is the identifier of the applied add-in item.

## Apply the Add-In

Perform the steps described in this section if you have an existing installation of the add-in, or if you have previously configured CA Clarity PPM Studio objects.

#### Follow these steps:

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-Ins.

The Add-Ins page appears.

3. Click the Accelerator: Program Management Office add-in (ID: csk).

The Add-In Details page appears.

4. Review the items in the list and select the items that are “Upgrade Ready” or “Not Installed.”

**Note:** By default, when you upgrade to the current add-in version, the items that are new or modified are pre-selected.

5. (Upgrade Only) For all active process instances with the "Upgrade Ready" status, cancel and delete the process instance.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

6. Click Apply.

**Note:** Selected items with dependency on other items are also updated.

A list of updated items displays on the confirmation or install page.

7. Click Yes to update or install the items.

If a user has previously changed an item listed on the confirmation or install page, publish the item before displaying the update to the users.

See the *Studio Developer's Guide* for more information.

## CA Best Practices Accelerator

As of PMO Accelerator v2.0, the PMO Accelerator add-in includes portlets, processes, subobjects, and templates that you may already have if the Best Practices Accelerator (BPA) was previously installed. If you are upgrading from PMO Accelerator v1.3, and you have the BPA installed, refer to the *Upgrading from Clarity's Best Practices Accelerator to PMO Accelerator v2.1* document for details on how to manage your upgrade to this PMO Accelerator version.



# Chapter 3: Certified and Supported Versions

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Only the following PMO Accelerator and CA Clarity PPM combinations are certified and supported. Use this table to check that you have the correct PMO Accelerator and Clarity combination:

CA Clarity Version	Add-In Version
v13.0	3.0
v12.1	2.2
8.1.5/CA Clarity PPM v12.0.6	2.1.1
8.1.5/CA Clarity PPM v12.0.5	2.1
8.1.5	2.0
8.1 Service Pack 2	1.3
8.1.1	1.2



# Chapter 4: Localization

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The user interface is available in the following supported languages:

- Brazilian Portuguese
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- German
- Italian
- Japanese
- Spanish
- Swedish
- Russian
- Turkish
- Hungarian
- Polish

The most recent editions of localized documentation are available online from the Documentation link on [CA Support](#).



# Chapter 5: Documentation

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The *PMO Accelerator Product Guide* contains product overview and installation information. The guide also includes detailed processes and procedures on how to use the add-in.

The most recent version of the PMO Accelerator Product Guide and Release Notes are available from the Documentation page on [CA Support](#). Visit this website periodically for the latest editions of the documentation.



# Chapter 6: Additional Resources

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## Known Issues

For information on known issues, visit [CA Support Online](#) and search the keyword: *pmo*. Any related articles and known issues are displayed.

## Contacting Technical Support

For online technical assistance and a complete list of locations, primary service hours, and telephone numbers, contact CA Support.

**Web address:**

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**Telephone numbers:**

North America: 1 888 550 6458

Europe: 44 08459 888788

Asia Pacific: 61 3 9821 3000