CA Clarity ™ PPM

PMO Accelerator Release Notes - On Demand

Release 03.3.00

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Chapter 1: Welcome to PMO Accelerator

Welcome to the CA Clarity PMO Accelerator Release 3.3 add-in (PMO Accelerator) release notes. This add-in is based on CA Clarity Project & Portfolio Manager (CA Clarity PPM) Release 13.3. This document can help you get started with this add-in.

This section contains the following topics:

What's New in Release 3.3

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

- Idea views include the new financial settings introduced in CA Clarity PPM Release 13.3. The new financial settings display on the Settings properties page of ideas.

- Benefit plan detail views for ideas display benefit class and benefit subclass fields.

- Cost and benefit plan detail views, for non-idea investments, have field renaming to improve consistency.

- Program views now display the Work Status and Status Reporting fields. These fields display on the Summary properties of programs.

- The Overview Project Dashboard page includes two new portlets: Schedule Dashboard and Cost and Effort Dashboard. These portlets are replacements for the Project Manager Schedule Dashboard and Project Manager Cost and Effort Dashboard portlets.

- Include Programs is now a filter option available for the following portlets: Issue Management, Risk Management, Status Report Listing, Late Status Reports, and Missing Status Reports.

- The Dashboards menu section has been moved to display at the end of the navigation menu, before the Custom Objects section. The Portfolio Dashboard menu item has been moved from the Portfolio Management menu section to the Dashboards section.

- Access groups have been updated to include financial setting rights for ideas and other non-project investment types. The access groups also include rights for idea cost and benefit plans.

- Performance improvements in portlet queries.

- Full localization support in 18 languages.

New and Improved Portlets

The following portlets were added or improved in Release 3.3. See the *PMO Accelerator Product Guide* for detailed descriptions of these portlets:

Portlet Name	New	Improved	Not Modified
Actuals by Transaction Type			x
Capital and Operating Budget vs. Forecast			x
Capital and Operating Cost Summary			x
Cost and Effort Dashboard	x		
Cost and Schedule Overview			x
Current Issues			x
Current Issues Listing			x
Earned Value Analysis by Phase			x
Investment Cost and Role Demand			x
Investment Cost by Period			x
Investment Financial Summary			x
Investment Planning by Period			x
Investment Schedule			x
Investment Timesheet Review			x
Investment Timesheet Summary			x
Issue Management		x	
Issue by Priority			x
Issue Listing		x	
Late Status Reports		x	
Late Tasks and Milestones		x	
Milestones			x
Missing Status Reports		x	
My Timesheets			x
Overview Program Filter			x
Overview Project Filter			x
Overview Sponsor Filter			x

Portlet Name	New	Improved	Not Modified
Pending Estimates Review		x	
Planned Cost by Goal			x
Planned Cost by Project Type			x
Planned Cost by Waterline			x
Portfolio Capital and Operating Cost Analysis			x
Portfolio Capital and Operating Costs			x
Portfolio Cost and Benefit Analysis			x
Portfolio Cost by Overall Health			x
Portfolio Costs			x
Portfolio Dashboard Filter			x
Portfolio Investment Count by Approval			x
Portfolio Investment Count by Goal			x
Portfolio Investment Count by Type			x
Portfolio Investment Count by Waterline			x
Portfolio Investment Count by Work Status			x
Portfolio Investment Dashboard Filter			x
Portfolio Planned Cost by Goal			x
Portfolio Planned NPV by Goal			x
Portfolio Role Analysis			x
Portfolio Role Demand by Goal			x
Portfolio Roles			x
Posted Transaction Review (Investment)		x	
Posted Transaction Review		x	
Process Bottleneck			x
Program Manager Cost Dashboard			x
Program Manager Schedule Dashboard			x
Project Analysis			x
Project Baselines		x	
Project Costs by Phase			x

Portlet Name	New	Improved	Not Modified
Project Costs by Resource			x
Project Costs by Task			x
Project Cycle Time Analysis			x
Project Document Review			x
Project Indicators			x
Project KPIs by OBS			x
Project Lifecycle Review		x	
Project Schedule			x
Resource Utilization		x	
Resource Utilization Percentage by Month		x	
Risk Management		x	
Role Capacity and Demand			x
Role Capacity and Demand Histogram			x
Role Demand by Goal			x
Role Demand by Waterline			x
Schedule and Progress			x
Schedule Dashboard	x		
Schedule Performance			x
Schedule Performance Details			x
Staffing			x
Staffing Details			x
Status Report Indicators			x
Status Report Listing		x	
Status Report Review Filter			x
Team Capacity		x	
Team Member Task Summary			x
Team Utilization		x	
Timesheet Notes			x
Timesheet Overview Filter			x
Timesheet Review			x

Portlet Name	New	Improved	Not Modified
Upcoming Milestone			x

Attribute Overwrite

Attributes installed by the PMO Accelerator in previous versions are overwritten during the upgrade to a higher version of the PMO Accelerator. If you have configured these attributes by renaming them, changing formulas in calculated attributes, or modifying display mappings; then your configurations will be overwritten and you will need to manually redo them after upgrade. These attributes are on the following objects: investment, project, and status report. For the full list of items overwritten upon upgrade, see Add-In Items Automatically Applied (see page 17).

View Protection

If you previously used Studio to configure views or installed another add-in that configured views, these configurations remain as-is when installing the PMO Accelerator add-in. 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 delivered in the PMO Accelerator.

See Apply the Add-In Items (see page 26) 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 Release 3.3. Use this information to decide whether to make manual changes to your existing views or to apply the new views.

Object Name	View	New	Improved	Not Modified
Application	Application Properties			x
	Application List			x
	Application Filter			x
Asset	Asset Properties			x
	Asset List			x
	Asset Filter			x
Assignment	Assignment Properties			x
	Task Assignment List		x	

Object Name	View	New	Improved	Not Modified
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	
	Idea Benefit Plan Detail List	x		
	Benefit Plan Detail Filter		x	
	Idea Benefit Plan Detail Filter	x		
Change	Change Properties			x
	Change List			x
	Change 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 Billing Detail List	x		
	Cost Plan Detail List		x	
	Cost Plan Detail Filter		x	
	Budget Plan Detail Filter		x	
GL Allocation	GL Allocation Debits Properties			x
	Debit Rule List			x
	Debit Rule Filter			x

Object Name	View	New	Improved	Not Modified
	Standard Rule Debits Properties			x
	Standard Rule List			x
	Standard Rule Filter			x
GL Allocation Detail	Overhead Rule Detail Properties			x
	Overhead Rule Detail List			x
	Overhead Rule Detail Filter			x
	Debit Rule Detail List			x
	Standard Rule Detail List			x
Idea	Idea Properties		x	
	Idea List			x
	Idea Filter			x
Issue	Issue Properties			x
	Issue List			x
	Issue Filter			x
	Associated Issues List		x	
Other Work	Other Work Properties			x
	Other Work List			x
	Other Work Filter			x
Product	Product Properties			x
	Product List			x
	Product Filter			x
Project	Project Properties			x
	Project List			x
	Project Filter			x
	Program Properties		x	
	Program List			x
	Program Filter			x
	My Projects			x

Object Name	View	New	Improved	Not Modified
	Subproject Selection List			x
	Subproject Selection Filter			x
	Project Templates Filter			x
	Project Release Filter			x
	Project Requirement Filter			x
Resource	Resource Labor Properties			x
	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

Object Name	View	New	Improved	Not Modified
Resource Credit Detail	Resource Credit Detail List			x
Risk	Risk Properties			x
	Risk List			x
	Risk Filter			x
	Associated Risks List		x	
Service	Service Properties			x
	Service List			x
	Service Filter			x
	Service Subscriptions List			x
	Service Subscriptions Filter			x
	Service Subscriptions List (Add)			x
	Service Subscriptions Filter (Add)			x
Status Report	Status Report Properties			x
	Status Report List			x
	Status Report Filter			x
Task	Task Properties			x
	Task List			x
	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

Object Name	View	New	Improved	Not Modified
Team	Staff Member Properties			x
	Project Team Staff List			x
	Project Team Detail List			x
	Team Staff List (Investments)			x
	Team Detail List (Investments)			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 and Queries No Longer Supported

The following portlets have been removed from the PMO Accelerator Release 3.3 and are no longer supported:

■ Project Management Cost and Effort Dashboard

(ID: cop.projectManagerCostDashboard)

■ Project Management Schedule Dashboard

(ID: cop.projectManagerScheduleDashboard)

■ Staffing Outlook portlet (ID: cop.staffing)

■ Upcoming Milestones portlet (ID: dashboardMilestones)

The following queries have been removed from the PMO Accelerator Release 3.3 and are no longer supported:

■ Project Manager Schedule Dashboard (ID: cop.projectScheduleDashboard)

■ Staffing Outlook (ID: cop.staffing)

Chapter 2: Review and Apply the Add-In

Add-In Items Automatically Applied

If you have previously configured the content installed by the PMO Accelerator for the following items, the configurations are <u>not</u> preserved. They are overwritten during installation or upgrade. The installation of these items is forced in each PMO release because it is required that the changes be applied. The description column in the table references the release that initially contained the item change for non-object changes

Name	Type	Description
Investment	Object	The installation of this item is forced to guarantee the following attributes and any corresponding display mappings are installed in the Investment object: Architectural Fit, BTM Integration, Business Alignment, Business Unit Priority, Commercial Value, Corporate Priority, Portfolio Category 1, Portfolio Category 2, Portfolio Category 3, Portfolio Category 4, Regulatory Compliance, Technology Compliance, and Work Status.
		It also includes the display mappings of the following attributes installed with CA Clarity PPM: Progress and Status Indicator.
Project	Object	The installation of this item is forced to guarantee the following attributes and any corresponding display mappings are installed in the Project object: Business Owner, Cost Variance %, Estimating Factor 1, Estimating Factor 2, Finance and Governance, Objective, Project Category, Projected Cost Variance, Projected Cost Variance %, Projected Effort Variance, Projected Effort Variance %, Project Management Office, Project Template, Project Type, Schedule to Baseline, Schedule Variance %, and Status Reporting.
		It also includes the display mappings of the Risk attribute installed with CA Clarity PPM.
Status Report	Object	The installation of this item is forced to guarantee the entire Status Report object is installed with the PMO Accelerator. Any changes to its attributes and any corresponding display mappings will be overwritten during the installation. It does not include or overwrite the object views.

Name	Type	Description
PMO-Project Status	Page	**PMO Version 3.0**: The installation of this item is forced to guarantee the page layout is installed with the PMO Accelerator and includes the following portlets: Project Indicators, Upcoming Milestones, Project Baselines, Status Report Indicators, Actuals by Transaction Type, and Team Utilization.
Actuals by Transaction Type	Portlet	**PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The query provider changes were made to improve performance. As a result of these performance improvements, the following columns are no longer available in portlet configuration: Amount Remaining, Billing, Charge Code, Date Entered, Investment Object Code, Project, Project Department, Project Entity, Project ID, Project Internal ID, Project Location, Resource Department, Resource Entity, Resource Internal ID, Resource Location, Task Internal ID, Transaction Class, Transaction Internal ID, Transaction Type, and WBS Sequence. The aggregation row was also removed. The portlet was improved so it now supports exporting the detail rows to Excel. The portlet has two placeholder columns that appear in the grid following the Transaction/Resource/Date column. These placeholder columns do not display any data unless the portlet is exported to Excel. If the portlet is exported to Excel, the resource name and transaction date display in the placeholder columns.
Cost and Schedule Overview	Portlet	**PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating % columns are available for adding by configuration to this portlet. The Actual Cost column was renamed to Actual Cost (ACWP).

Name	Type	Description
Posted Transaction Review	Portlet	**PMO Release 3.3**: The Cost type field is added to the portlet as a column and filter. It is placed after the Charge Code. **PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Cost Type (column and filter) and the Entry Number (filter only) are available for adding by configuration to this portlet. The portlet does not show results without filtering and the Investment filter is now required. **Note**: This portlet is available from the Posted Transaction Review page in the menu.
Posted Transaction Review	Portlet	**PMO Release 3.3**: The Cost type field is added to the portlet as a column and filter. It is placed after the Charge Code. **PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Cost Type (column and filter) and the Entry Number (filter only) are available for adding by configuration to this portlet. **Note**: This portlet is available as a cost plan detail object action.
Program Manager Cost Dashboard	Portlet	**PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating % columns are available for adding by configuration to this portlet. The Actual Cost column was renamed to Actual Cost (ACWP).
Schedule and Progress	Portlet	**PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Planned Capital Cost and Planned Operating Cost metrics are available for adding by configuration to this portlet.

Name	Type	Description
Team Member Task Summary	Portlet	**PMO Release 3.2**: The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The portlet now displays the guidelines icon if the task has a valid URL as a guideline or a guideline is set up for the site.
Actuals by Transaction Type	Query	**PMO Release 3.2**: Performance improvements were made to this query provider. As a result of these performance improvements, the following columns were removed from the query: Amount Remaining, Billing, Charge Code, Date Entered, Investment Object Code, Project, Project Department, Project Entity, Project ID, Project Internal ID, Project Location, Resource Department, Resource Entity, Resource Internal ID, Resource Location, Task Internal ID, Transaction Class, Transaction Internal ID, Transaction Type, WBS Sequence. Also, the query was improved so it now supports exporting the detail rows to Excel.
Cost and Effort Dashboard	Query	**PMO Release 3.3**: This is a new query. The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Cost and Schedule Overview	Query	**PMO Release 3.2**: The query now includes the new cost columns: Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating %. Also, the Actual Cost column was renamed to Actual Cost (ACWP).
Current Issues	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Current Issues Listing	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Earned Value Analysis by Phase	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.

Name	Type	Description
Investment Resource Utilization	Query	**PMO Release 3.3**: The query has been changed so the portlet displays periods formatted correctly when changing locale settings in CA Clarity PPM.
Investment Timesheet Review	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Investment Timesheet Summary	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Issue Management	Query	**PMO Release 3.3**: The query has a filter option to include programs. By default, this filter option is set to Yes, which means program issues are displayed in the portlet.
Issues By Priority	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Issues Listing	Query	**PMO Release 3.3**: A link to Investment Properties has been added to the query.
Late Status Reports	Query	**PMO Release 3.3**: The query has a filter option to include programs. By default, this filter option is set to Yes, which means program late status reports are displayed in the portlet.
Late Tasks and Milestones	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Milestones	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Missing Status Reports	Query	**PMO Release 3.3**: The query has a filter option to include programs. By default, this filter option is set to Yes, which means program missing status reports are displayed in the portlet.

Name	Type	Description
Pending Estimates	Query	**PMO Release 3.3**: The query excludes records when the recommended change in ETC is equal to zero. **PMO Release 3.2**: The query only includes pending ETC that is set to a value. If pending ETC is NULL (no value entered), then it will not be included in the query results.
Process Bottlenecks	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Program Manager Cost Dashboard	Query	**PMO Release 3.2**: The query includes the new cost columns: Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating %. Also, the Actual Cost column is renamed to Actual Cost (ACWP).
Program Manager Schedule Dashboard	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Project Analysis	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Project Baselines	Query	**PMO Release 3.3**: The query has been changed so the portlet displays periods formatted correctly when changing locale settings in CA Clarity PPM. The query has been fixed for SQL server so it no longer produces a duplicate dimension error. The error was caused by an issue with a database function in the query. The function to calculate non-current baseline has been corrected, eliminating the error.
Project Costs by Phase	Query	**PMO Release 3.2**: The Actual Cost column is renamed to Actual Cost (ACWP).
Project Costs By Resource	Query	**PMO Release 3.2**: The Actual Cost column is renamed to Actual Cost (ACWP).
Project Costs By Task	Query	**PMO Release 3.2**: The Actual Cost column is renamed to Actual Cost (ACWP).

Name	Type	Description
Project Cycle Time Analysis Query	Query	**PMO Release 3.2**: The query does not produce duplicate dimensional data anymore when the work breakdown structure has several levels, including phases and tasks.
Project Document Review	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Project Indicators	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Project KPIs By OBS	Query	**PMO Release 3.2**: The Project Details column is renamed to Project Dashboard. The mapping is changed from the Side Arrow Neutral icon to the Dashboard icon.
Project Life Cycle Review	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Risk Management	Query	**PMO Release 3.3**: The query has a filter option to include programs. By default, this filter option is set to Yes, which means program risks are displayed in the portlet.
Schedule and Progress	Query	**PMO Release 3.2**: The query includes the new cost columns: Planned Capital Cost and Planned Operating Cost.
Schedule Dashboard	Query	**PMO Release 3.3**: This is a new query. The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Schedule Performance	Query	**PMO Release 3.3**: The query has been changed to include tasks from projects not associated to any OBS unit and display results consistent with the Schedule Performance Details drill down portlet.
Schedule Performance Details	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.

Name	Type	Description
Staffing	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Staffing Details	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Status Report Indicators	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Status Report Listing	Query	**PMO Release 3.3**: The query has a filter option to include programs. By default, this filter option is set to Yes, which means program status reports are displayed in the portlet.
Team Capacity	Query	**PMO Release 3.3**: The query has been changed so the portlet displays periods formatted correctly when changing locale settings in CA Clarity PPM.
Team Member Organizer	Query	**PMO Release 3.2**: The query is modified to display the guidelines icon if the task has a valid URL as a guideline or a guideline is set up for the site.
Timesheet Notes	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Timesheet Review	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.

Name	Type	Description
Transaction Review	Query	**PMO Release 3.3**: The amounts with aggregate functions have been converted from dimension properties to metrics so they are no longer available in the power filter. This is because CA Clarity PPM produces a system error if a query attribute has an aggregate function and the attribute is selected in the power filter. **PMO Release 3.2**: The query includes the Cost Type as a column and filter. It also includes and the Entry Number as a parameter filter.
Upcoming Project Milestones	Query	**PMO Release 3.2**: The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.

Review the Add-In Items

The following steps explain how to review the add-in items before applying them.

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.

See for a list of the items updated in the PMO Accelerator Release 3.3. The items also include descriptions of the changes.

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. Items that are new to the add-in version or items that produced an error upon install or apply. When the PMO Accelerator is not upgraded right after upgrading from a previous Clarity release, several items will show as Not Installed and an alert message saying that the add-in needs to be installed will display. Install the add-in before reviewing the items showing as Upgrade Ready.

■ Upgrade Ready. Items that you applied from a previous add-in version that have an update to the item in the current add-in version or views updated via the add-in that you have also modified via Studio.

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 add-in item.

Apply the Add-In Items

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. These steps are not required when the add-in is installed for the first time.

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. If you do not want to apply all items, from the Add-In Details page, unselect all pre-selected items by clicking in the box at the top of the page to the left of the Name column heading one time to select all items and a second time to unselect all items. After that select the items you want to apply. Selected items with dependency on other items are also selected.

   For a list of the items updated in PMO Accelerator Release 3.3 and a description of the updates, see PMO Release 3.2 to PMO Release 3.3 Upgrade (see page 35).

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 dependencies on other items are also updated.

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

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

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.

   For more information, see the *Studio Developer's Guide*.

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 PMO Accelerator Release 3.3.

Chapter 3: Localization

The user interface is available in the following supported languages:

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

The most recent editions of localized documentation are available online from the Documentation link on CA Support.

Chapter 4: Documentation

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 5: Additional Resources

Known Issues

For information on known issues, visit CA Support Online and search the keyword: *pmo3open*. 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:

http://www.support.ca.com

Telephone numbers:

North America: 1 888 550 6458

Europe: 44 08459 888788

Asia Pacific: 61 3 9821 3000

Chapter 6: Upgrade Information

PMO Release 3.2 to PMO Release 3.3 Upgrade

If you have PMO Release 3.2 installed and you upgrade to PMO Release 3.3, the Add-in Details page shows which items are not applied. Their status will display as Upgrade Ready. In many cases, the reason why an item shows as Upgrade Ready is because there is an update to the item included in the new add-in version.

The following table shows a scenario where PMO Release 3.2 was fully installed and applied, including all custom views, and it was upgraded to PMO Release 3.3. The order of the items in the table reflects the same order displayed in the Add-in Details page. Items with more than one dependency are duplicated in the table, also reflecting how they display in the Add-in Details page.

Important! You should review the table because it explains the recommended actions for applying the add-in items with an Upgrade Ready status. It identifies whether it is strongly recommended, recommended, or optional for you to apply the updates.

The following fields display in the table:

Name

Indicates the item name and is the same as the name in the Add-in Details page.

Type

Indicates the item type and is the same as the type in the Add-in Details page.

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

Description

Describes the update and provides a short explanation of why you should apply it.

Action

Indicates the action that should be taken on the item.

Values:

■ SR. The update is strongly recommended. It must be applied.

■ R. The update is recommended. It should be applied.

■ O. The update is optional. We recommend you apply the update unless you have modified custom views or items and do not want your modifications overwritten. If you do not apply a view update, you should read the description of the changes and consider manually making the changes in your configured views.

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

Name	Type	Description	Action
Idea and Project Category Parameterized Lookup	Lookup	The lookup no longer includes deactivated lookup values.	R
Issues Listing	Portlet	The Properties icon is replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Overview Page	Page	The Overview page shows as Upgrade Ready because of the change made to the Project Dashboard tab. The Project Dashboard tab is part of the Overview page.	O
General	Tab	The General tab shows as Upgrade Ready because the Project Dashboard tab on the Overview page has been changed. If one tab on a page is changed, then all tabs on the page display as Upgrade Ready.	O
Sponsor	Tab	The Sponsor tab shows as Upgrade Ready because the Project Dashboard tab on the Overview page has been changed. If one tab on a page is changed, then all tabs on the page display as Upgrade Ready.	O
Program Dashboard	Tab	The Program Dashboard tab shows as Upgrade Ready because the Project Dashboard tab on the Overview page has been changed. If one tab on a page is changed, then all tabs on the page display as Upgrade Ready.	O
PM Alerts	Tab	The PM Alerts tab shows as Upgrade Ready because the Project Dashboard tab on the Overview page has been changed. If one tab on a page is changed, then all tabs on the page display as Upgrade Ready.	O

Name	Type	Description	Action
Project Dashboard	Tab	The Project Dashboard tab, which is part of the Overview page, is modified to display the following new portlets: Schedule Dashboard and Cost and Effort Dashboard. The Project Manager Schedule Dashboard and Project Manager Cost and Effort Dashboard portlets, which previously resided on this tab, are end of life and no longer supported.	SR
Issues and Risks	Tab	The Issues and Risks tab shows as Upgrade Ready because the Project Dashboard tab on the Overview page has been changed. If one tab on a page is changed, then all tabs on the page display as Upgrade Ready.	O
Risk Management	Portlet	The portlet has a filter option to include programs. By default, this filter option is set to Yes, which means program risks are displayed in the portlet.	R
Issue Management	Portlet	The portlet has a filter option to include programs. By default, this filter option is set to Yes, which means program issues are displayed in the portlet.	R
PMO-Program Status	Page	The reference to the action linking to the project properties has been renamed from 'Main' to 'Project Properties'.	R
Dashboard	Tab	The reference to the action linking to the project properties has been renamed from 'Main' to 'Project Properties'.	R
Resource Utilization	Portlet	The portlet displays periods formatted correctly when changing language and locale settings in CA Clarity PPM.	R
PMO-Project Status	Page	The reference to the action linking to the project properties has been renamed from 'Main' to 'Project Properties'.	R
Dashboard	Tab	The reference to the action linking to the project properties has been renamed from 'Main' to 'Project Properties'.	R
Project Baselines	Portlet	The portlet displays periods formatted correctly when changing language and locale settings in CA Clarity PPM.	R
Team Utilization	Portlet	The portlet is modified so it no longer displays the Save button. Editing is not supported on this portlet.	R
PMO-Project Storyboard	Page	The reference to the action linking to the project properties has been renamed from 'Main' to 'Project Properties'.	R
Dashboard	Tab	The reference to the action linking to the project properties has been renamed from 'Main' to 'Project Properties'.	R
Team Capacity	Portlet	The portlet displays periods formatted correctly when changing language and locale settings in CA Clarity PPM. Portlet Page: PMO-Project Storyboard	R

Name	Type	Description	Action
Team Capacity	Portlet	The portlet displays periods formatted correctly when changing language and locale settings in CA Clarity PPM. Portlet Page: Project Storyboard Drill Down	R
Status Reporting Listing	Portlet	The portlet has a filter option to include program. By default, this filter option is set to Yes, which means program status reports are displayed in the portlet.	R
Late Status Reports	Portlet	The portlet has a filter option to include programs. By default, this filter option is set to Yes, which means program late status reports are displayed in the portlet.	R
Missing Status Reports	Portlet	The portlet has a filter option to include programs. By default, this filter option is set to Yes, which means program missing status reports are displayed in the portlet.	R
Late Tasks and Milestones	Portlet	The link to the 'Project WBS Page' in the Task ID column has been removed because it opens up the Clarity Gantt in the same window, instead of as a pop-up, and you lose your navigation path back.	R
Project Lifecycle Review	Portlet	The portlet now includes a secondary sort by Project.	R
Resource Utilization Percentage by Month	Portlet	The portlet displays periods formatted correctly when changing locale settings in CA Clarity PPM.	R
Major Project Template Methodology	Project	The template has been modified to remove team members before updating the template in order to avoid the possibility of duplicating resources during upgrades.	R
Major Project Template	Project	The template has been modified to remove team members before updating the template in order to avoid the possibility of duplicating resources during upgrades.	R
Create Major Project Process	Process	The process has been renamed from 'Create Major IT Project Process' to 'Create Major Project Process'. The description has been renamed from 'Creates a project with the Major IT Project Template' to 'Creates a project with the Major Project Template'.	R
PMO Idea Creator	Group	The group includes the new access rights to view and edit financial settings on ideas.	R
PMO Idea Reviewer	Group	The group includes the new access rights to view and edit financial settings on ideas. It also includes access rights to edit, submit for approval, and approve financial plans on ideas.	R

Name	Type	Description	Action
PMO Investment Creator	Group	The group includes the new access rights to view and edit financial settings on ideas and the existing access rights to view and edit financial settings on applications, assets, products, services and other work investments.	R
PMO Investment Viewer Extended	Group	The group includes the new access rights to view financial settings and financial plans on ideas.	R
PMO Resource Manager Extended	Group	The 'Page – View' right for 'Capacity Planning Overview' is included.	R
Dashboards	Menu	The Dashboards menu section has been moved to display at the end of the navigation menu, before the Custom Objects section. The Portfolio Dashboard menu item has been moved from the Portfolio Management menu section to the Dashboards section.	SR
Assignment Object List View	Custom View	The Actual Cost column was renamed to Actual Cost (ACWP).	O
Benefit Plan Detail Object List View	Custom View	The Planned column is renamed to Benefit Total. The Realized column is renamed to Realized Benefit. The Variance column is renamed to Benefit Variance. The following attributes are not displayed in the view, but they are also renamed: Total Billing Benefit is renamed to Billing Benefit Total, Total Actual Benefit is renamed to Realized Benefit Total. The aggregation rows are also renamed. Planned is renamed Benefit, Realized is renamed Realized Benefit, and Variance is renamed Benefit Variance in the aggregation rows.	O
Benefit Plan Detail Object Filter View	Custom View	The following attributes are not displayed in the view, but they are renamed: Total Billing Benefit is renamed to Billing Benefit Total, Total Actual Benefit is renamed to Realized Benefit Total, and Total Benefit is renamed to Benefit Total.	O
Cost Plan Detail Object List View	Custom View	The Planned column is renamed to Cost and removed from the view as a column; however, it displays in the view as a time scaled value. The Total Cost column is renamed to Cost Total and added to the view. The Actual column is renamed to Actual Cost. The Variance column is renamed to Cost Variance. The following attributes are not displayed in the view, but they are also renamed: Total Revenue is renamed to Revenue Total and Total Units is renamed to Units Total.	O
Cost Plan Detail Object Filter View	Custom View	The Transaction Class filter is changed from pull-down to browse.	O
Cost Plan Detail Object – Budget Filter View	Custom View	The Transaction Class filter is changed from pull-down to browse.	O

Name	Type	Description	Action
Idea Object Property Views	Custom View	The Settings subpage (ID: idea.cop.settings) has been removed from the PMO add-in installer because there is a new Financial subpage (ID: npiofinproperties.ideaCreate) on the idea in CA Clarity PPM Release 13.3. The PMO add-in installer renames this Financial subpage to Settings. This is consistent with all of the other investment types where the PMO add-in installer renames the Financial subpage to Settings. Upgrading customers will see two subpages on the idea: Settings and Financial. The Settings subpage (ID: idea.cop.settings) should be deleted and then the 'Idea Object Property Views' item should be applied from the Add-In Details page. Applying this item renames the Financial subpage to Settings, adds the fields that were on the original Settings subpage that has been deleted, and adds the new financial fields available on the idea in CA Clarity PPM Release 13.3. The new financial fields available on the Idea Settings subpage are: billing currency code, department, location, financial status, cost type, labor transaction rate and cost source matrices, material transaction rate and cost source matrices, equipment transaction rate and cost source matrices.	O
Associated Issues List View	Custom View	The view is modified to sort in ascending order first by Target Resolution Date and second by Risk Name.	O
Associated Risks List View	Custom View	The view is modified to sort in ascending order first by Target Resolution Date and second by Risk Name. Also, the column 'Is Above Threshold' is renamed to 'Above Threshold' to be consistent with the Risk List View.	O
Project Object Property Views	Custom View	The Program Summary subpage is modified to include the Work Status and Status Reporting lookup fields.	O
Gantt List View	Custom View	The Actual Cost column is renamed to Actual Cost (ACWP). The Duration field is now editable in the Gantt view according to the rules implemented in CA Clarity PPM Release 13.3.	O
Project Stakeholder	Lookup	This lookup has been modified to include resource level security. The lookup is now included in the Add-in Details page so changes to it can be applied to CA Clarity PPM.	R