CA Clarity ™ PPM

PMO Accelerator Release Notes - On Demand

Release 14.1.00

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Chapter 1: Welcome to PMO Accelerator

Welcome to the CA Clarity PMO Accelerator Release 14.1 add-in (PMO Accelerator) release notes. This add-in is based on CA Clarity Project & Portfolio Manager (CA Clarity PPM) Release 14.1. This document can help you get started with this add-in.

This section contains the following topics:

What's New in Release 14.1

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

- The PMO-Portfolio Investment Dashboard page now includes a Scorecard tab. The Scorecard tab displays two portlets:

  – Balance

  – Investment Cost and Role Demand (which was previously available on the Analysis tab)

  The Analysis tab now includes four portlets:

  – Planned Cost by Goal

  – Planned Benefit by Goal

  – Role Demand by Goal

  – Planned NPV by Goal

  The Planned Benefit by Goal and Planned NPV by Goal portlets are new. The Planned Cost by Waterline and Role Demand by Waterline portlets, previously configured on the Analysis tab, are still available for configuration.

- The Overview Issues and Risks page was renamed to Risks, Issues and Changes and includes a new portlet: Change Request Management.

- Performance improvements in portlet queries.

- Full localization support in 19 languages.

New and Improved Portlets

The following portlets were added or improved in Release 14.1. See the *PMO Accelerator Product Guide* for detailed descriptions of these portlets:

Portlet Name	New	Improved	Not Modified
Actuals by Transaction Type			x
Balance	x		
Capital and Operating Budget vs. Forecast			x
Capital and Operating Cost Summary			x
Change Request Management	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

Portlet Name	New	Improved	Not Modified
Overview Project Filter			x
Overview Sponsor Filter			x
Pending Estimates Review			x
Planned Benefit by Goal	x		
Planned Cost by Goal			x
Planned Cost by Project Type			x
Planned Cost by Waterline			x
Planned NPV by Goal	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

Portlet Name	New	Improved	Not Modified
Program Manager Schedule Dashboard			x
Project Analysis			x
Project Baselines		x	
Project Costs by Phase			x
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

Portlet Name	New	Improved	Not Modified
Team Utilization			x
Timesheet Notes			x
Timesheet Overview Filter		x	
Timesheet Review			x
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 Installed (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 Install 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 14.1. 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

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

Object Name	View	New	Improved	Not Modified
GL Allocation	GL Allocation Debits Properties			x
	Debit Rule List			x
	Debit Rule Filter			x
	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

Object Name	View	New	Improved	Not Modified
	Program Properties			x
	Program List			x
	Program Filter			x
	My Projects			x
	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

Object Name	View	New	Improved	Not Modified
Resource Credit	Resource Credit			x
	Resource Credit List			x
	Resource Credit Filter			x
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

Object Name	View	New	Improved	Not Modified
	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 (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

Attribute No Longer Supported

The following attribute has been removed from the PMO Accelerator Release 14.1 and is no longer supported:

■ BTM Integration (ID: btm_integration)

This attribute was available on the investment and portfolio investment objects. The attribute is no longer delivered with the PMO Accelerator; however, it is not automatically deleted for upgrades. Upgrading customers should manually delete this attribute from the investment object, which automatically deletes it from the portfolio investment object.

Chapter 2: Installation Information

This section contains the following topics:

Add-In Items Automatically Installed

If you have previously configured the content installed by the PMO Accelerator for the following items, the configurations are not 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.
Portfolio Investment	Object	The installation of this item is forced to guarantee that the PMO Accelerator investment and project attributes are available for the portfolio providers and portfolio portlets.
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.

Name	Type	Description
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.
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.

Name	Type	Description
Cost and Schedule Overview	Portlet	**PMO Release 14.1** Performance improvements have been made to the query provider. **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).
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.

Name	Type	Description
Program Manager Cost Dashboard	Portlet	**PMO Release 14.1** The query has been modified to display Planned ROI and Planned IRR as percent calculated numbers. **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.
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.

Name	Type	Description
Cost and Schedule Overview	Query	**PMO Release 14.1** Performance improvements have been made to the query provider. **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.
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.

Name	Type	Description
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.
My Timesheets	Query	**PMO Release 14.1** The MS SQL Server version of the query has been fixed so the query does not produce duplicate dimension data in some specific situations.
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.

Name	Type	Description
Process Bottlenecks	Query	**PMO Release 14.1** The query supports a larger number of reviewers associated with an action item in a process milestone step. **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 14.1** The query was modified to display Planned ROI and Planned IRR as percent calculated numbers. **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 14.1** The ProjectID page link parameter was renamed to ID. With this change, the Staffing portlet is now available for configuration on project dashboard pages. **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 14.1** The ProjectID page link parameter was renamed to ID. With this change, the Staffing Details portlet is now available for configuration on project dashboard pages. **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.

Install the Add-In Items (Previously Installed Releases Only)

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 Content Add-Ins.

   The Content Add-Ins page appears.

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

   The Content Add-In Items List page appears.

4. Review the items in the list and select the items that are "Upgrade Ready" or "Not Installed." Use the Status filter available on this page.

   The Status indicates if the add-in item is installed 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. When the PMO Accelerator is not upgraded after upgrading from a previous CA Clarity PPM 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 to change the status of these items.

   ■ Upgrade Ready. Items that you installed 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 installing them. Installing modified items overwrites your configurations.

   ■ Installed. Items that are installed.

5. Select the items you want to install.

   For a list of the items updated in PMO Accelerator Release 14.1 and a description of the updates, see PMO Release 3.3 to PMO Release 14.1 Upgrade (see page 35).

   If you have previously configured Studio object views, the configurations are preserved and are not overwritten during installation. You can decide which views to install by selecting them. For more information about how PMO Accelerator configures views, see the *PMO Accelerator Product Guide*.

6. (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.

7. Click Install.

   The items selected to install display on the Confirm Content Item Installation page. If selected items have dependencies on other items, the dependent items will also display on the page and must be installed.

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

8. 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 documentation.

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 14.1.

Chapter 3: Localization

The user interface is available in the following supported languages:

- Brazilian Portuguese

- Catalan

- 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

This section contains the following topics:

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

This section contains the following topics:

PMO Release 3.3 to PMO Release 14.1 Upgrade

If you have PMO Release 3.3 installed and you upgrade to PMO Release 14.1, the Content Add-In Items List page shows which items are not installed. 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 3.3 was fully installed and applied, including all custom views, and it was upgraded to PMO Release 14.1. The items in the table are sorted alphabetically by Content Item.

Important! You should review the table because it explains the recommended actions for installing 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:

Content Item

Indicates the item name and is the same as the Content Item in the Content Add-In Items List page.

Type

Indicates the item type and is the same as the type in the Content Add-In Items List page.

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 installed.

- R. The update is recommended. It should be installed.

- ■ O. The update is optional. We recommend you install 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 installing them. Installing modified items overwrites your configurations.

Content Item	Type	Description	Action
Benefit Plan Detail Object Filter View	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. These attributes were renamed in PMO Release 3.3. Only prior releases need to install this view to update the attribute names.	O
Overview Page	Page	The Overview page shows as Upgrade Ready because of the changes made to the Risks, Issues and Changes tab. The Risks, Issues and Changes tab, which is part of the Overview page, is modified to display the new Change Request Management portlet. The Risk Management and Issue Management portlets still reside on this tab. In the PMO Release 14.1 this tab was renamed from Issues and Risks to Risks, Issues and Changes.	R
PMO-Portfolio Investment Dashboard	Page	The PMO-Portfolio Investment Dashboard shows as Upgrade Ready because of the new Scorecard tab and also because of the changes made to the Analysis tab.	R
		The new Scorecard tab, which is part of the PMO-Portfolio Investment Dashboard page, includes two portlets: Balance, and Investment Cost and Role Demand. The Balance portlet is new and the Investment Cost and Role Demand portlet was previously available on the Analysis tab.	
		The Analysis tab, which is part of the PMO-Portfolio Investment Dashboard page, is modified to display the following portlets: Planned Cost by Goal, Planned Benefit by Goal, Role Demand by Goal, and Planned NPV by Goal. The Planned Cost by Waterline and Role Demand by Waterline portlets, which previously resided on this tab, have been removed but are still available for configuration. The Investment Cost and Role Demand portlet, which was previously available on the Analysis tab, is now available on the new Scorecard tab.	

Content Item	Type	Description	Action
Portlet Timesheet Period Browse	Lookup	The lookup has been modified to display Start Date and Finish Date attributes using Data Picker as the Field Element Type. The Time Period column has been removed. The lookup displays periods formatted correctly when changing language and locale settings in CA Clarity PPM. In some scenarios, the Field Element Type is not updated as Date Picker and remains as Text. The work around when this happens is to manually change the Field Element Type to Date Picker for the Start Date and Finish Date attributes.	SR
Staffing Outlook Drill Down	Page	The ProjectID page link parameter has been renamed to ID. With this change, the Staffing Details portlet is now available for configuration on project dashboard pages.	R
Timesheet Overview Filter	Portlet	The portlet filter has been modified to display the Timesheet Period field as a browse instead of a pull-down. The Timesheet Period field uses the Portlet Timesheet Period Browse lookup. With the display type modified to browse, the Start Date and Finish Date columns display and the periods are formatted correctly when changing language and locale settings.	SR