

# CA Clarity™ PPM

## PMO Accelerator Release Notes - On Premise

Release 14.2.00



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# Chapter 1: Welcome to PMO Accelerator

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Welcome to the CA Clarity PPM PMO Accelerator Release 14.2 add-in (PMO Accelerator) release notes. This add-in is based on CA Clarity Project & Portfolio Manager (CA Clarity PPM) Release 14.2. This document can help you get started with this add-in.

This section contains the following topics:

[What's New in Release 14.2](#) (see page 8)

[New and Improved Portlets](#) (see page 9)

[Attribute Overwrite and Data Warehouse](#) (see page 12)

[View Protection](#) (see page 13)

[Attribute No Longer Supported](#) (see page 18)

## What's New in Release 14.2

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

- New Jaspersoft Advanced Reporting content including a collection of Jaspersoft domains and Jaspersoft Studio reports to be used in conjunction with the PMO Accelerator add-in.
- Domains included: Application Management, Custom Master Objects, Financial Management, Idea Management, Investment Management, Project Management, Resource Management, and Time Management.
- Project Management reports included: KPIs by Project Type, KPIs by Project Type (Dashboard), Key Task and Milestone Status, Project Change Request Register, Project Cost and Effort, Project Issue Register, Project Portfolio Summary, Project Risk Register, Project Risk, Issue, and Change Summary, Project Status Detail, Project Status Report List, Project Storyboard, Project Task Dependencies, and Top 50 Project Watchlist.
- Investment Management reports included: Investment Allocations and Assignments, Investment Assignment by Task, and Investment Baseline vs. Plan by Task.
- Resource Management reports included: Capacity vs. Allocation by OBS, Capacity vs. Booking Status by OBS, Capacity vs. Demand by Resource, Capacity vs. Demand by Role, Over/Under Allocation by Resource, Over/Under Allocation by Role, Resource Allocations and Assignments, Resource Assignments by Task, Resource Availability, Resource Baseline vs. Plan by Employment Type, Resource Forecast Utilization, Resource Forecast Utilization Detail, and Resource Skills.
- Time Management reports included: Missing Time, Resource Time Review by Manager, Resource Time Summary and Detail, Time Compliance, and Time Compliance Detail.
- Financial Management reports included: Financial Capitalization by Investment, Financial Capitalization Detail, Financial Forecast Review by Investment, Financial Forecast Review by Plan Grouping, and Investment Transaction Inquiry.
- Administration reports included: User Access Rights, User Access Rights Detail, User License and Activity, and User License and Activity Detail.
- Jaspersoft roles that include the permissions to the domains and reports available with the advanced reporting content: CSK\_ROLE\_ADMINISTRATION, CSK\_ROLE\_ALL\_REPORTS\_DOMAINS, CSK\_ROLE\_APPLICATION\_MANAGEMENT, CSK\_ROLE\_CUSTOM\_MASTER\_OBJECTS, CSK\_ROLE\_FINANCIAL\_MANAGEMENT, CSK\_ROLE\_IDEA\_MANAGEMENT, CSK\_ROLE\_INVESTMENT\_MANAGEMENT, CSK\_ROLE\_PROGRAM\_MANAGEMENT, CSK\_ROLE\_PROJECT\_MANAGEMENT, CSK\_ROLE\_RESOURCE\_MANAGEMENT, and CSK\_ROLE\_TIME\_MANAGEMENT.
- Full localization support in 19 languages.

## New and Improved Portlets

The following portlets were added or improved in Release 14.2. 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

<b>Portlet Name</b>	<b>New</b>	<b>Improved</b>	<b>Not Modified</b>
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

<b>Portlet Name</b>	<b>New</b>	<b>Improved</b>	<b>Not Modified</b>
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 and Data Warehouse

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, changing the Included in the Data Warehouse check box, 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: benefit plan detail, idea, investment, project, and status report. For the full list of items overwritten upon upgrade, see [Add-In Items Automatically Installed](#) (see page 20).

The majority of attributes installed by the PMO Accelerator have the *Included in the Data Warehouse* field checked. Do not uncheck this field because reports depend upon them. The PMO Accelerator attribute IDs are renamed when their respective columns are created in the Data Warehouse. See the *PMO Accelerator for Jaspersoft Advanced Reporting Product Guide* for a complete list of the attributes and their corresponding column names.

## 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 30) 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 14.2. 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
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

<b>Object Name</b>	<b>View</b>	<b>New</b>	<b>Improved</b>	<b>Not Modified</b>
	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
	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

<b>Object Name</b>	<b>View</b>	<b>New</b>	<b>Improved</b>	<b>Not Modified</b>
	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
	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

<b>Object Name</b>	<b>View</b>	<b>New</b>	<b>Improved</b>	<b>Not Modified</b>
	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
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

Object Name	View	New	Improved	Not Modified
	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
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

Object Name	View	New	Improved	Not Modified
	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

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This section contains the following topics:

[Install the Add-In](#) (see page 19)

[Add-In Items Automatically Installed](#) (see page 20)

[Install the Add-In Items \(Previously Installed Releases Only\)](#) (see page 30)

[Import the Jaspersoft Advanced Reporting Content](#) (see page 32)

[CA Best Practices Accelerator](#) (see page 34)

[Install PMO Accelerator Sample Data](#) (see page 35)

## Install the Add-In

Install the PMO Accelerator add-in on your CA Clarity application server so that the content is available to you. The PMO Accelerator add-in is included with the CA Clarity PPM product and is ready for installing. In releases prior to PMO Accelerator Release 3.2, you had to download the add-in installer from the support site, but this is no longer necessary.

If you are upgrading from a previous CA Clarity PPM release, with the PMO Accelerator installed, you must also upgrade the PMO Accelerator. Review the certified and supported versions chart to see the version of the add-in that must be installed with the CA Clarity PPM version.

As a best practice, we recommend you back up the existing CA Clarity PPM installation directory and database before installing the add-in.

The following steps explain how to install the PMO Accelerator add-in on your CA Clarity PPM application server.

### **Follow these steps:**

1. Stop the services.
2. Execute the install script.
3. Start the services.

### **Stop the Services**

Before installing the add-in, stop the CA Clarity PPM Application (app) and CA Clarity PPM Background (bg) services. Stop the services from the Clarity System Administration. See the CA Clarity PPM Installation Guide for information about stopping CA Clarity PPM services.

### Execute the install script

The following procedure installs lookups, queries, portlets, pages, views, processes, groups, resource roles, project templates, and database objects.

**Important!** Back up your CA Clarity PPM installation before installing this add-in so that you can restore the application to the prior version, if necessary. Once you have installed the add-in, you cannot uninstall it.

#### Follow these steps:

1. Open a command prompt and navigate to the CA Clarity PPM runtime bin directory.
2. Enter the command:  
`admin content csk`

The installation process begins and information displays on the screen. The information is captured and stored in the admin.log file that is located in the logs directory. The output files are stored in the logs/content/xog/csk directory.

3. Review the screen output and the logs for important information after the installation completes.

### Start the Services

After installing the add-in, start the CA Clarity Application (app) and CA Clarity Background (bg) services. Start the services from Clarity System Administration. See the *CA Clarity PPM Installation Guide* for information about starting CA Clarity services.

## 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
Benefit Plan Detail	Object	The installation of this item is forced to guarantee the following attributes are installed in the Benefit Plan Detail object: Benefit Class, and Benefit Subclass.

Name	Type	Description
Idea	Object	<p>The installation of this item is forced to guarantee the following attributes and any corresponding display mappings are installed in the Idea object: Business Owner, Fast Track, Idea Category, Objective, and Request Type.</p> <p>It also includes the display mappings of the Idea Priority attribute installed with CA Clarity PPM.</p>
Investment	Object	<p>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.</p> <p>It also includes the display mappings of the following attributes installed with CA Clarity PPM: Progress and Status Indicator.</p>
Portfolio Investment	Object	<p>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.</p>
Project	Object	<p>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.</p> <p>It also includes the display mappings of the Risk attribute installed with CA Clarity PPM.</p>
Status Report	Object	<p>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.</p>
Idea and Project Category Parameterized Lookup	Lookup	<p><b>PMO Release 14.2:</b></p> <p>The installation of this item is forced to guarantee the lookup query is updated with the language code information required by the Data Warehouse.</p>

Name	Type	Description
PMO-Project Status	Page	<p><b>PMO Version 3.0:</b></p> <p>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.</p>
Actuals by Transaction Type	Portlet	<p><b>PMO Release 3.2:</b></p> <p>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.</p> <p>The portlet was improved so it now supports exporting the detail rows to Excel.</p> <p>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.</p>
Cost and Schedule Overview	Portlet	<p><b>PMO Release 14.1:</b></p> <p>Performance improvements have been made to the query provider.</p> <p><b>PMO Release 3.2:</b></p> <p>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).</p>

Name	Type	Description
Posted Transaction Review	Portlet	<p><b>PMO Release 3.3:</b></p> <p>The Cost type field is added to the portlet as a column and filter. It is placed after the Charge Code.</p> <p><b>PMO Release 3.2:</b></p> <p>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.</p> <p><b>Note:</b> This portlet is available from the Posted Transaction Review page in the menu.</p>
Posted Transaction Review	Portlet	<p><b>PMO Release 3.3:</b></p> <p>The Cost type field is added to the portlet as a column and filter. It is placed after the Charge Code.</p> <p><b>PMO Release 3.2:</b></p> <p>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.</p> <p><b>Note:</b> This portlet is available as a cost plan detail object action.</p>
Program Manager Cost Dashboard	Portlet	<p><b>PMO Release 14.1:</b></p> <p>The query has been modified to display Planned ROI and Planned IRR as percent calculated numbers.</p> <p><b>PMO Release 3.2:</b></p> <p>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).</p>
Schedule and Progress	Portlet	<p><b>PMO Release 3.2:</b></p> <p>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.</p>

Name	Type	Description
Team Member Task Summary	Portlet	<p><b>PMO Release 3.2:</b></p> <p>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.</p>
Actuals by Transaction Type	Query	<p><b>PMO Release 3.2:</b></p> <p>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.</p>
Cost and Effort Dashboard	Query	<p><b>PMO Release 14.2:</b></p> <p>The query has been changed so the Work Status filter is now passing the Work Status internal ID.</p> <p><b>PMO Release 3.3:</b></p> <p>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.</p>
Cost and Schedule Overview	Query	<p><b>PMO Release 14.1:</b></p> <p>Performance improvements have been made to the query provider.</p> <p><b>PMO Release 3.2:</b></p> <p>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).</p>
Current Issues	Query	<p><b>PMO Release 3.2:</b></p> <p>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.</p>

Name	Type	Description
Current Issues Listing	Query	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.3:</b> The query has been changed so the portlet displays periods formatted correctly when changing locale settings in CA Clarity PPM.
Investment Timesheet Review	Query	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.3:</b> A link to Investment Properties has been added to the query.
Late Status Reports	Query	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.2:</b> 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
Milestones	Query	<p><b>PMO Release 3.2:</b></p> <p>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.</p>
Missing Status Reports	Query	<p><b>PMO Release 3.3:</b></p> <p>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.</p>
My Timesheets	Query	<p><b>PMO Release 14.1:</b></p> <p>The MS SQL Server version of the query has been fixed so the query does not produce duplicate dimension data in some specific situations.</p>
Pending Estimates	Query	<p><b>PMO Release 3.3:</b></p> <p>The query excludes records when the recommended change in ETC is equal to zero.</p> <p><b>PMO Release 3.2:</b></p> <p>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.</p>
Process Bottlenecks	Query	<p><b>PMO Release 14.1:</b></p> <p>The query supports a larger number of reviewers associated with an action item in a process milestone step.</p> <p><b>PMO Release 3.2:</b></p> <p>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.</p>
Program Manager Cost Dashboard	Query	<p><b>PMO Release 14.1:</b></p> <p>The query was modified to display Planned ROI and Planned IRR as percent calculated numbers.</p> <p><b>PMO Release 3.2:</b></p> <p>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).</p>
Program Manager Schedule Dashboard	Query	<p><b>PMO Release 3.2:</b></p> <p>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.</p>

Name	Type	Description
Project Analysis	Query	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.2:</b> The Actual Cost column is renamed to Actual Cost (ACWP).
Project Costs By Resource	Query	<b>PMO Release 3.2:</b> The Actual Cost column is renamed to Actual Cost (ACWP).
Project Costs By Task	Query	<b>PMO Release 3.2:</b> The Actual Cost column is renamed to Actual Cost (ACWP).
Project Cycle Time Analysis Query	Query	<b>PMO Release 14.2:</b> The query has been changed so the duration includes start and finish dates. <b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> The Project Details column is renamed to Project Dashboard. The mapping is changed from the Side Arrow Neutral icon to the Dashboard icon.

Name	Type	Description
Project Life Cycle Review	Query	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.2:</b> The query includes the new cost columns: Planned Capital Cost and Planned Operating Cost.
Schedule Dashboard	Query	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.2:</b> 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	Query	<b>PMO Release 14.1:</b> The ProjectID page link parameter was renamed to ID. With this change, the Staffing portlet is now available for configuration on project dashboard pages. <b>PMO Release 3.2:</b> 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	<b>PMO Release 14.1:</b> 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. <b>PMO Release 3.2:</b> 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
Status Report Indicators	Query	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.3:</b> 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	<b>PMO Release 3.3:</b> The query has been changed so the portlet displays periods formatted correctly when changing locale settings in CA Clarity PPM.
Team Member Organizer	Query	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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.
Transaction Review	Query	<b>PMO Release 3.3:</b> 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. <b>PMO Release 3.2:</b> 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	<b>PMO Release 3.2:</b> 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 14.2 and a description of the updates, see [PMO Release 14.1 to PMO Release 14.2 Upgrade](#) (see page 45).

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.

## Import the Jaspersoft Advanced Reporting Content

The following procedure imports domains, reports, input controls, localization bundles, images, templates, data sources and roles. It also creates the organization name and the user specified in the CA Clarity System Administration (CSA) Reporting subtab.

**Important!** It is required that you specify the organization name and the user in the CSA Reporting subtab before importing the Jaspersoft Advanced Reporting Content. In addition, the PMO Accelerator Release 14.2 is a required prerequisite of the Jaspersoft Advanced Reporting content because many of the reports reference objects and attributes that are delivered in the PMO Accelerator.

Before importing the Jaspersoft Advanced Reporting content, you need to complete the steps to set up advanced reporting in Jaspersoft and CA Clarity PPM. For more information about how to set up advanced reporting, see the *CA Clarity PPM Installation Guide*.

The import does the following:

- Creates the organization. Define the organization name in the CSA Reporting subtab before importing.
- Creates the CA PPM folder and its subfolders in the organization's repository. The CA PPM folder contains all of the Jaspersoft Advanced Reporting content items.
- Creates the Advanced Reporting roles. See the *CA Clarity PPM Administration Guide* for a description of these roles.
- Creates the PMO Accelerator roles. These roles determine content permissions and begin with "CSK\_".
- Updates the domains with the Data Warehouse schema owner name specific to the database.
- Uploads the UI Themes.
- Creates the Shared folder.
- Creates the Jaspersoft administrator user. The default user is "ppmjasperadmin". This user can be changed in the CSA Reporting subtab before importing, but after importing this user should not be modified. The Create and Update Jaspersoft Users job and the Load Data Warehouse job, which dynamically updates domains, require this user.

**Follow these steps:**

1. Open a command prompt and navigate to the CA Clarity PPM runtime bin directory.
2. Enter the command:  
`admin content-jaspersoft csk -userName superuser -password <password>`

The import process begins and information displays on the screen. The information is not stored in log files. The import process requires the superuser user.

3. Review the screen output for important information after the import completes.
4. Open Administration, and from Studio, click Content Add-Ins.

The Content Add-Ins page appears.

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

The Content Add-In Accelerator: Program Management Office – Properties page appears.

6. Review the Jaspersoft Content Installed Date included in the Versions section of this page.

**Optional import parameters:**

- Use the upgrade parameter if you are upgrading or reimporting the content:  
`admin content-jaspersoft csk -userName superuser -password <password> upgrade`

**Note:** There is no dash (-) before the upgrade parameter.

**Important!** If you have already imported the advanced reporting content, you must use the upgrade parameter to reimport the content. The upgrade parameter does the following:

- Overwrites the CA PPM folder permissions.
- Overwrites the out-of-the-box subfolders, including permissions, in the CA PPM folder.
- Overwrites the out-of-the-box Jaspersoft Advanced Reporting items, including permissions, in the CA PPM folder and subfolders. Items include domains, input controls, etc.
- Deletes everything in the CA PPM/Reports subfolder and recreates the out-of-the-box reports. The deletion includes out-of-the-box and customer specific reports and subfolders. If you have created reports, saved report filters or scheduled reports in the Reports subfolder; these items are deleted after reimporting.
- Use the *fileName* parameter if you need to import a file other than the default `jaspersoft_csk.zip` file included in the PMO Accelerator:  
`admin content-jaspersoft csk -userName superuser -password <password> -fileName jaspersoft_csk.zip`
- Network latency might cause the import to fail with an error message asking to increase the value of the `-retryCount`. Use the `-retryCount <count>` parameter to increase the waiting period, where 1 count corresponds to 10 seconds. For example, the below command has a count of 50, which corresponds to 500 seconds. The default is 20.  
`admin content-jaspersoft csk -userName superuser -password <password> -fileName jaspersoft_csk.zip -retryCount 50`

## 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 14.2.

## Install PMO Accelerator Sample Data

You can install the PMO Accelerator sample data to see and use examples of the functionality of CA Clarity PPM.

**Important!** Sample data is strictly for test or development environments. Do not install the sample data on your production CA Clarity PPM server. Installing the data on a CA Clarity PPM server that contains data may produce a failure, overwrite existing data, or both. After you install the sample data, you cannot remove it.

Before installing the add-in sample data, set up the system currency to USD and stop the CA Clarity Application (app) and CA Clarity Background (bg) services.

### Follow these steps:

1. Log in to CA Clarity PPM as admin, or as any user with Financial Maintenance - Financial Management and Financial Maintenance - Financial Organizational Structure global access rights.
2. Open Administration, and from Finance menu, click Setup.  
The financial management defaults page appears.
3. Select currency as USD and save it.
4. Log in to CA Clarity System Administration.
5. Open Home, and click All Services.
6. Select the CA Clarity Application (app) and the CA Clarity Background (bg) check boxes.
7. Click Stop.
8. If you are using IBM WebSphere, stop CA Clarity System Administration and applications using the application server administration console.  
For more information, see the J2EE vendor documentation.
9. Open a command prompt and navigate to the CA Clarity PPM runtime bin directory.
10. Enter the following command to install the sample data:  
`admin content-demo csk`  
The installation process begins and information displays on the screen. The output files are stored in the logs/content/xog/csk directory.
11. Review the screen output and the logs for important information after the installation completes.
12. After installing the add-in, start the CA Clarity Application (app) and CA Clarity Background (bg) services.
13. Open Administration, and from Studio, click Content Add-Ins.  
The Content Add-Ins page appears.

14. Click the Accelerator: Program Management Office add-in (ID: csk).  
The Content Add-In Accelerator: Program Management Office – Properties page appears.
15. Review the Sample Data Installed Date included in the Versions section of this page.

# 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 CA Clarity PPM combination:

CA Clarity PPM Version	Add-In Version
14.2	14.2
14.1	14.1
13.3	3.3
13.2	3.2
13.1	3.1
13.0	3.0
12.1	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

**Important!** The upgrade from PMO v1.2 to PMO v3.0 is not a valid upgrade path. If you have PMO v1.2 installed, you must upgrade to PMO Release 3.1 or higher.

The upgrade from versions prior to PMO v1.2 need to patch the COP\_PROJECT\_ROLLOUP\_V database view to remove references to the PRBASESUM column of the PRASSIGNMENT table before upgrading to PMO Release 3.3. Contact technical support to obtain a patch.



# Chapter 4: Localization

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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 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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This section contains the following topics:

[Contacting Technical Support](#) (see page 43)

## 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 7: Upgrade Information

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This section contains the following topics:

[PMO Release 14.1 to PMO Release 14.2 Upgrade](#) (see page 45)

## PMO Release 14.1 to PMO Release 14.2 Upgrade

If you have PMO Release 14.1 installed and you upgrade to PMO Release 14.2, 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 14.1 was fully installed and applied, including all custom views, and it was upgraded to PMO Release 14.2. 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
Project Team Detail List View	View	The view is modified to include the Update Cost Totals action. Optionally, you can manually modify this view in CA Clarity PPM Studio instead of applying it. Open Administration, and from Studio menu, click Objects. Select the Team object, and from Views tab, click Actions Menu link of the Project Team – Detail view. Select the General menu and move the Update Cost Totals action to Selected Actions.	O
Project Team Staff List View	View	The view is modified to include the Update Cost Totals action. Optionally, you can manually modify this view in CA Clarity PPM Studio instead of applying it. Open Administration, and from Studio menu, click Objects. Select the Team object, and from Views tab, click Actions Menu link of the Project Team – Staff view. Select the General menu and move the Update Cost Totals action to Selected Actions.	O