

Great Lakes User Group

Digital Celerity LLC
Manage > Lead > Govern

CA Clarity PPM™ v12 Upgrade

r7.5.3 → r8.1 → v12

Differences & Considerations



Agenda

➤ Overview

- Goals and Objectives to Upgrade
- Tools

➤ Differences

- Architecture Changes – 7.5.3 to v12
- Clarity 8 Features & Enhancements
- Clarity 12 Features & Enhancements

➤ Upgrade Path

➤ Considerations

- Upgrade to 8.1 Considerations
- Upgrade to v12 Considerations

➤ Conclusions (v13 Beta)



Clarity PPM v12 Upgrade: Overview

- **Goals and Objectives to Upgrade**
 - Clarity PPM r7.5.3 (soon to be retired)
 - New features with Clarity 8
 - New features with Clarity 12
 - Improve performance of Resource Management Features
 - Better functional architecture
 - Database clustering capabilities
 - Thousands of bug fixes, many minor and major enhancements
 - New product architecture stack additions
 - Leverage new reporting capabilities



Clarity PPM v12 Upgrade: Overview

➤ Tools

- Read the manuals to familiarize yourself with v12
 - Change Impact and Upgrade Guide
 - Release Notes
 - Installation and Upgrade Guide
 - Technical Reference Manual
 - Product Architecture Stack
- CA Clarity PPM v12 Upgrade Page on CA Support Online and Digital Celerity's Knowledge-Share
 - Links are provided to product guides, FAQs, webcasts, service offerings, customer forums, and other useful information.



Clarity PPM v12: Differences

➤ Architecture Changes – 7.5.3 to v12

- Significant functional data model change
 - altered and migrated the investments data model
 - replacing several tables with views for backwards compatibility
- Stand-alone report viewer web server
- Better functional architecture
- Product architecture stack additions
 - 64-bit Windows and Linux
 - Windows 2008
 - Oracle 11g



Clarity PPM v12: Differences

➤ CA Clarity PPM v8 Data Model Changes

Object	Clarity Defined Data	User Defined Data
Investment	INV_INVESTMENTS	ODF_CA_INV
Project	INV_PROJECTS	ODF_CA_PROJECT
Asset	INV_ASSETS	ODF_CA_ASSETS
Application	INV_APPLICATIONS	ODF_CA_APPLICATION
Product	INV_PRODUCTS	ODF_CA_PRODUCT
Other	INV_OTHERS	ODF_CA_OTHER
Service	INV_SERVICES	ODF_CA_SERVICE
Idea	INV_IDEAS	ODF_CA_IDEA

Clarity PPM v12: Differences

➤ CA Clarity PPM v8 Data Model Changes

Use the following tables to select financial plan values by day:

Total Cost = Slice * (Finish_Date - Start_Date)

- ODF_SSL_CST_DTL_UNITS
- ODF_SSL_CST_DTL_COST
- ODF_SSL_CST_DTL_REV
- ODF_SSL_CST_DTL_BFCOST
- ODF_SSL_CST_DTL_BREV
- ODF_SSL_BFT_DTL_BFT
- ODF_SSL_BFT_DTL_BBFT



Clarity PPM v12: Differences

➤ Clarity PPM v8 Data Model Changes

The following Tables have been replaced with views for backwards compatibility:

View	Data Stored in Tables
SRM_PROJECTS	INV_INVESTMENTS, ODF_CA_INV or INV_PROJECTS
PRJ_PROJECTS	INV_INVESTMENTS, ODF_CA_INV, FIN_FINANCIALS or INV_PROJECTS

➤ Clarity PPM v8 Report Changes

- Business Objects should be installed before Clarity is installed.

Clarity PPM v12: Differences

➤ Clarity PPM v8 XOG Changes

Object	Description
Report	Not backwards compatible.
Portlet	Not backwards compatible.
Job	Not backwards compatible.
Processes	The Processes read and write format changed significantly for Multiple Objects, Multiple Actions features. These changes are not backward-compatible.
Idea	The Ideas read and write format changed significantly to better match the format and functionality of the other Investment object APIs. These changes are not backward-compatible.
Requisition	The Requisitions read and write format changed significantly based on the data model changes made to Requisitions in 8.0. These changes are not backward-compatible.
Financial Plan	The read and write format for financial plans changed significantly to match the major re-design of the Budgeting functionality. These changes are not backward-compatible.
GL Account	The GL Account read and write format changed significantly to match the major re-design of the Chargeback functionality. These changes are not backward-compatible.
Entity	The Entity read and write format changed significantly to match the major re-design of the Financial Organization Structure functionality. These changes are not backward-compatible.
Department	The Department read and write format changed significantly to match the major re-design of the Financial Organization Structure functionality. These changes are not backward-compatible.
Location	The Location read and write format changed significantly to match the major re-design of the Financial Organization Structure functionality. These changes are not backward-compatible.

Clarity PPM v12: Differences

➤ Clarity PPM v8 Features & Enhancements

➤ Non-Project Investment Object (NPIO)

- Ideas have been added as an NPIO.
- 'Other Investments' is renamed to 'Other Work'.
- NPIOs can be Staffed in the same manner as Projects.
- NPIO time entry will follow the same rules that are followed for entering Actuals for Tasks on Projects.
- Financial Planning can now be used with NPIOs to capture a Cost Plan (Forecast) and Budgeted spend on an Investment.
- Financial Chargebacks can now be used on an NPIO to allow for the chargeback of time and money to other Departments in the organization.
- All NPIOs have the ability to Baseline and multiple baselines are supported.
- All NPIOs now have a Hierarchy tab.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Timesheets

- Timesheets have been modified to include four sections.
 - Tasks
 - Other Time
 - Incidents
 - Indirect Rows



➤ Resource Management

- Capacity Planning functionality rewritten.
 - Resource Planning Portlets have been enhanced.
 - Total Demand looks across all Investment Types.
 - NPIO staffing can be viewed as part of Capacity Planning.
- Resource Requisitions functionality enhanced.
 - Supports the ability to staff a project with multiple instances of the same roles.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Resource Management continued

➤ System Options

- Allow Override of Requisition Approval Flag.
- Allow Mixed Bookings.

➤ You can now staff a non-project investment object including an Idea.

➤ Capability to allow Resources, belonging to an OBS Unit, to be allocated (added) en masse to an Investment Object.

➤ Portfolio Management

➤ Portfolio Content can now include all Investment objects.

➤ Roles can be used to help define the parameters of a Portfolio.

➤ New fields have been added to the Portfolio properties.

➤ Portfolio planning at the Department level.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Business Process management improvement

- Multiple Objects can be accessed from one process.
 - Conditions and Action Items can use information from all objects involved in the process.
 - Links can be configured between Objects via Lookups and the Process Engine will recognize the Links.
 - Setup Pre/Post Conditions using information from all of the Objects in the Process.
- A Step in a Process can now contain more than one Action.
- New Action Type called Subprocess and can be invoked within an Action and can run 3 different ways.
 - Synchronous
 - Asynchronous
 - Independent

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Business Process Management improvement continued

- Escalations can now be configured at both the Step-level and Process-level.
- Process creator is able to validate incrementally or validate just a sub-set of a process.
- The new 'Validate Process Definitions' Job will check for primary Processes which have an inactive Subprocess and will mark them for revalidation.
- Event context for Start Options will now check the previous and new values of attributes.
- Process Flow Diagrams allow drill-down from the diagram to a specific Step, Group, Action or Subprocess.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Audit Trail Improvements

- Ability to track Create/Delete actions.
- Master/subobject audit trails viewable from the same page.
- Global Audit Trail View to see audit trail records across all objects.
- Audit Trail Purge Job can be configured to delete audit trail records that are more than a specified number of days old.

➤ Clarity Studio

- Custom Objects and Custom Attributes can now be deleted allowing for a “cleaner” system.
- A new type of portlet named “Filter” has been created and will filter the content across all portlets on that page or can be configured to filter across multiple pages.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Clarity Studio continued

- Ability to configure any String Attribute with the auto-numbering feature.
- New and Delete configurable actions can be configured on the list view or grid portlet.
- Two new Types of Attributes:
 - Calculated
 - Time Varying
- Ability to filter the list of values within a dynamic query lookup, based on what has been selected in another Attribute on that object.
- Configure what images to display for a specific studio attribute. There are 34 images available out of the box.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Clarity Studio continued

- Ability on a custom portlet to allow/not allow the end-user to configure the view.

➤ Financial Management

➤ New Department functionality.

- Department Object has been created and replaces financial departments and locations.
- The Financial Organization Structure (FOS) is replaced by the new Department feature which combines the FOS with the OBS while maintaining the relationship between Entities, Locations and Departments that was used in previous versions.
- Departments and Locations exist as instances of ODF Objects and also exist as Nodes in an OBS.
- Each time a department is created, a portfolio to match is automatically created with full portfolio management functionality.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Financial Management

➤ New Department functionality continued

- The Resources tab on the Department shows capacity vs. demand for the department's resources.
- Departments subscribe to Services (Consumers) or can also be Providers of Services. A Department can be both a Consumer and a Provider for the same, or different, Services.
- Entity and Location(s) must be created before the Departments can be created.

➤ New Financial Planning Enhancements.

- Financial Plan can be created for any investment, including a service.
- Forecast → Approval → Budget
 - The "forecast" of the planned spend on the investment is entered in a Cost Plan.
 - Cost Plans can be created manually or imported from the Resource Plan.
 - Approved portion of the Cost Plan becomes the Budget.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Financial Management



➤ New Financial Planning Enhancements continued

- Benefit Plans do not go through an approval process and are independent of the forecasts / budgets they are associated with.

➤ New Chargebacks functionality.

- Chargebacks can be used for all Investments.
- Invoices and recovery statements are available.
- Investments can be configured to use either their own chargeback rule or Entity-specific global rules.
- Costs incurred by Service or detailed Investments are charged back via % or pre-determined rates.
- Organizations must decide what criteria will be used to Credit.
- Create Departments as needed to represent Charge To and Credit To groups within the organization.
- Set up the rules for the Standard Charge To based on the organization's needs.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Financial Management

- Location and Department OBSs are defined at the Entity Level.
- Fiscal time periods are Entity based.
- Location & Department require an OBS.
- Matrices can contain all Investments.



➤ Service Management

- New Service investment object.
- Services provide insight into the business of IT and what they are working on for the business.
- Services contain Providers and Subscribers.
- Services have time tracking, budgeting and chargeback capabilities.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

➤ Service management

- Accumulate transactions against all investments to provide total cost of ownership (TCO) for services or individual investments provided by IT.
- Cost Plans can be created to determine how and when the money for the Services will be spent.
- Benefit Plans can be created to determine how much and when the benefit will be realized for the Service.
- Cost Plans are approved to become Budgets.
- Processes can be written against a Service.
- A department can subscribe to one or more services.

Clarity PPM v12: Differences

➤ Clarity 8 Features & Enhancements continued

- Business Relationship Manager
 - Collection of 64 portlets with drill-downs.
 - Business Relationship Manager is comprised of three different dashboards and two portals.
 - Valuable reporting tool for:
 - Independent Provider/Subscriber Department Managers
 - Individual Service Manager
 - High Level IT Managers
 - Business Relationship Manager
- Projects and WBS improvement
- Modifications to the Investment Data Model
- Business Analytics for CA Clarity PPM (8.1)

Clarity PPM v12: Differences

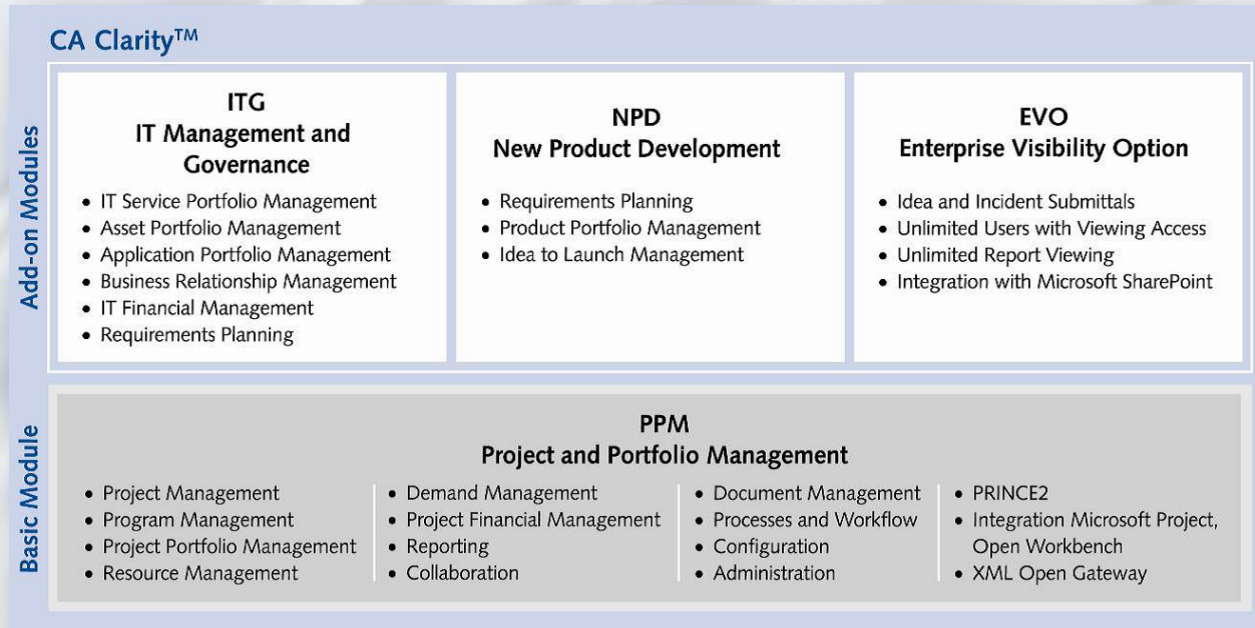
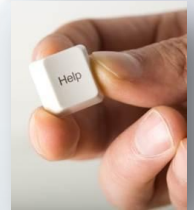
➤ Clarity 8 Features & Enhancements continued

➤ Clarity Security

- System now defines when a right has been assigned automatically by the application.
- The "Management – Capacity Planning" right has been removed.
- NPIO's have several new rights such as Modify Baseline, Edit / View Financial (All), as well as others.
- The permissions to Start, Cancel and Delete processes were defined as three separate rights.
- Need rights to the Subobject to view Audit Trails from the master Object.
- Cost Plan, Benefit Plan and Budget Plan rights added.
- Additional Financial, Services and Department access rights.

Clarity PPM v12: Differences

CA Clarity PPM v12 Features & Enhancements



- PRINCE2
- Integration Microsoft Project, Open Workbench
- XML Open Gateway

Clarity PPM v12: Differences

➤ Clarity PPM v12 Portlet Changes

- A new portlet type called Interactive is available.
- This type uses a flash file (swf) as the data source.
- Portlet parameters are used to bind the portlet flash file to Clarity.
- The flash file is created using SAP Xcelsius.



Clarity PPM v12: Differences

➤ Clarity PPM v12 Time Slice Changes

- Semi-monthly is no longer a valid value for time slice definitions for either Rollover Interval or Slice Period.
- **Upgrade action:** Before upgrading to v12.1, review your time slice definitions. Edit those definitions that have *Rollover Interval* or *Slice Period* set to semi-monthly and select a new value.

Clarity PPM v12: Differences

➤ Clarity 12 Report Changes

- In previous CA Clarity PPM versions, customers had to install the BIAR files (that include a universe, reports, folders and database connection object) using CA Clarity System Administration and command line.
- **Important!** For v12.1, the command line and CA Clarity System Administration method for installing reports is no longer available. After properly configuring the Reporting properties from CA Clarity System Administration, install these BIAR files using the BusinessObjects Enterprise Import Wizard from a Windows workstation. If you are using a UNIX environment, install the BusinessObjects client tools on a Windows workstation. The Import Wizard lets you selectively import specific items (for example, user groups and ACLs). In addition, the Import Wizard provides flexibility when importing BIAR files.
- **Note:** See the *Installation Guide* for more information.



Clarity PPM v12: Differences

➤ Clarity 12 Report Changes

- CA Clarity PPM v12.1 lets you configure LDAP support between CA Clarity PPM and other CA Technologies software applications with the BusinessObjects server.
- **Note:** See the *Installation Guide* for more information on how to set up LDAP.
- **Upgrade action:** If you have not set up LDAP or if you want to sync up the non-LDAP users, run the job *Create BusinessObjects Users* after the upgrade. This job syncs the user lists in BusinessObjects and CA Clarity PPM. If the job is not run, CA Clarity PPM users cannot run or open a report unless a BusinessObjects account has been created for the user.



Clarity PPM v12: Differences

➤ Clarity 12 Database Changes

- For Oracle 10g, patch 6810189 must be installed before installing PMO Accelerator.
- For Oracle 11g, patch 6880880 (Opatch utility update) and patch 9736864 must be installed before installing PMO Accelerator.

➤ Configured Views

- Configured views on Clarity Objects and Portlets may be overwritten by the upgrade scripts



Clarity PPM v12: Differences

➤ Clarity 12 XOG Changes

- XOG is revised and not backward Compatible

Importing Custom Attributes of Custom Objects

- `overrideAutoNumbering=true` in header will cause values in source file to be used to update Clarity (default)
- `overrideAutoNumbering=false` in header will cause auto numbering scheme to be used to update Clarity



Clarity PPM v12: Differences

➤ Clarity 12 XOG Changes

Exporting Content Types

- Exports a specific content type
 - `<args name="singleContentType" value="content type">`
 - Works for Job Definitions, Lookups, Menu Manager, Objects, Portlet Pages, Portlets, Processes, and Queries
- Exporting with and without dependencies
 - `<args name="no_dependencies" value="true"/>` to export incremental changes without dependencies
 - `<args name="no_dependencies" value="false"/>` to export incremental changes with dependencies (default)

Clarity PPM v12: Differences

➤ Clarity 12 XOG Changes

Exporting Portlets

- Select Export button on portlets list page
- Selected portlet is exported to zip file without dependencies



Clarity PPM v12: Differences

➤ Clarity 12 Features & Enhancements

➤ Business Objects (BO) XI reporting

- Packaged as CA Business Intelligence Embedding Kit
- Supporting intersection of BOXI PAS and CA Clarity PPM PAS

➤ Requirements planning

- supports the upfront scoping exercise that allows business needs to be captured in the form of requirements, estimated at high-levels, and prioritized and bundled into product or service releases
- generate a roadmap that can be presented to stakeholders to both evaluate and understand the NPD or IT process
- Once approved, release plans and requirements can be attached to programs, projects, and tasks for implementation
- track the progress of requirements from the development cycle to release.

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
 - Microsoft SharePoint add-in
 - provides a place in SharePoint for non-CA Clarity PPM users to view CA Clarity PPM information about projects in which they have an interest for collaborative efforts
 - CA Clarity PPM projects can be published as SharePoint project home pages to provide key real-time information from Clarity with drill-down capabilities for users who want to see more information directly in CA Clarity PPM
 - New Product Development (NPD) add-in
 - provides automated processes and workflows to help an organization implement its product management methodology of choice
 - supports product portfolio planning and allows the creation of portfolios based on brand and product line

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
- **New Product Development (NPD) add-in**
 - handles product management from conception to launch by moving an idea, and later a project, through specific stages/gates
 - Based on Stage Gate best practices
 - Complete automation of gate approval processes
 - Gate scoring based on six factors
 - Assigned gatekeepers for one or more gates
 - Role-Based Dashboards - Over 50 portlets
 - Enhanced Project, Product, and Idea Objects - New attributes and sub-pages designed to track NPD metrics
 - designed around specific roles such as marketing manager, project manager or product manager

Clarity PPM v12: Differences

➤ Clarity 12 Features & Enhancements continued

- Open Workbench users can take advantage of updated Help file content in Open Workbench.
- Assistance with Studio Views migration now built-in
 - Use the new Studio Views screen to show which views have changes that you will need to deal with.
 - New Global Views Admin Screen
 - Filtered list of all views across all Studio Objects. Shows whether a view is:
 - Personalized: configured by one or more end users
 - Modified: configured by an administrator
 - Upgraded: changed since the last release
- Earned Value Management add-in
 - Adds new EVM content
 - Not required, can continue using pre-v12 EV features
 - Highly recommended to implement

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
 - Department Names can be 120 Characters in Length
 - Personal Dashboarding
 - allows individual users to create and manage Portlets and Dashboards and share Dashboards with other users
 - ability to export the Studio Grid and Graph portlets individually or in a dashboard to Microsoft Excel and PowerPoint
 - Calculating Summary Task Percent Complete in Open Workbench
 - new methods (Manual, Duration, and Effort) are now available for calculating and displaying percent complete for tasks in real-time
 - The previous behavior of using the lowest value of detail tasks has been removed from Open Workbench
 - Earned value calculations will now use the % Complete option
 - The % Expended option for calculating earned value has been removed

Differences continued

- **Clarity 12 Features & Enhancements** continued
 - Enhancements in Task Percent Complete Calculation
 - three methods are now available (Manual, Duration, and Effort) for calculating percent complete for tasks.
 - there is an overall percent complete value at the project level
 - Display Assignee Status for Current User Only in Process Action Item Details
 - This enhancement provides the ability to display only the current user information when assigning a manual action item in a process.
 - Software Load-Balanced Configurations Simplified
 - valid jsessionID HTTP Cookie is created upon successful authentication to simplify some load-balancer configurations

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
 - Ability to Filter Reports by Category and Status
 - filter reports by their status and category making the filtered reports list shorter and more relevant
 - Ability to Set External Authentication Flag in User XOG
 - allows you to set the External Authentication flag for a user via the User XOG API
 - Email Notification Sender Address Control
 - set the sender address of email notifications to a constant value
 - API for Customizing MSP Interface to Clarity
 - an API that allows users to customize certain aspects of the Microsoft Project interface

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
 - Web Intelligence Support for Business Objects Integration
 - Run and view Web Intelligence (Webi) reports from CA Clarity PPM
 - Enhancements to Actual Cost of Assignments
 - introduces the following new fields
 - A new, time-varying actual cost field in the CA Clarity PPM database. This field is automatically populated whenever actual work is posted against an assignment.
 - A new, Actual Cost field for an assignment on the Task Properties page of a CA Clarity PPM project. This field sums all the time-varying actual costs for an assignment
 - The enhancement also introduces a new Actual Cost field in Open Workbench to keep assignment costs synchronized with CA Clarity PPM

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
 - Protect Against Deletion of Project Resources and Task Assignments if Actuals Exist
 - prevents the removal, replacement, or deletion of assignments or removal of staff members from projects if actuals exist on a task assignment
 - New Reports – Business Objects
 - Invoice Register Report
 - Pre-Billing Report
 - New Licensing Model
 - includes new license types that are automatically visible on the License Information portlets for all new customers
 - existing customers can set up their systems to display the new license types from the Server Properties page on the CA Clarity PPM System Administration tool

Clarity PPM v12: Differences

- **Clarity 12 Features & Enhancements** continued
 - New XOG Content Pack Argument to Exclude Parent Objects
 - A new argument “exclude_parent” is available when executing the contentPack XOG API. This allows the export of a child object without exporting the parent object.

CA Clarity PPM Upgrade Path



➤ **CA Clarity PPM r7.5 to v12.1.x in one step is not an option**

- r7.5.3 any fix pack to r8.1
- r8.0 any fix pack to r8.1
- r8.1 any fix pack or service pack to v12.1.x



➤ **CA Clarity PPM r8.1 to v12.1.x in one step**

- r8.1 any fix pack or service pack to v12.1.x

Clarity PPM v12

Upgrade Considerations

➤ Upgrade to 8.1 Considerations

➤ NPIO

- Migrated ideas have a 20 char limitation for Idea ID in Clarity 8. Greater than 20 characters will be truncated.
- Training or documentation required for the following:
 - Other Investments have been renamed to Other Work.
 - NPIOs have new features.
- There are impacts of the changes on the Total Cost of Ownership calculations.
- New security for NPIO's.

➤ Timesheets

- Time Tracking is now available for NPIOs.
- User Values/Utility Codes 1 & 2 – are they needed?

Clarity PPM v12

Upgrade Considerations

- **Upgrade to 8.1 Considerations** continued
 - Resource Management
 - User experience for Capacity Planning has changed.
 - New terminology and new fields in Capacity Planning.
 - Existing scenarios will not be migrated. They will be deleted.
 - New security options.
 - Existing requisitions will not migrate.
 - Additional options for staffing NPIO's and by OBS.
 - Portfolio Management
 - In Clarity 8, when you submit the toolbar filter, the logic identifies the matching investments from the portfolio by applying the filter to the first investment.
 - With Clarity 8, all seeded portlets (csk) were changed to refer to planned cost `planned_cst_*` and `planned_ben_*`.

➤ Upgrade to 8.1 Considerations continued

➤ Portfolio Management

- NSQL portlet changes may impact data results.

➤ Business Management Processes

- Changes to security access rights.
- Which new enhancements can streamline existing processes?

➤ Audit Trails

- Create audit trails for insert/deletes?
- New Global Audit Trail link – management and access.
- New Audit Trail Purge Job – days for data retention?

➤ Clarity Studio

- Changes to security access rights.
- Impact of new functionality and attributes.

➤ Upgrade to 8.1 Considerations continued

➤ Financial Management

- Existing implementations of Financials will need to be reworked as part of the migration.
- FOS move to the OBS and Finance Setup.
- Department OBS and Location OBS are required.
- One Entity and One Location are now required.
- Fiscal Periods are now linked to an Entity.
- No longer two separate concepts of Forecast and Budget. The term Forecast is no longer visible in the tool.
- Training and documentation updates to incorporate the changes.
- Financial Planning is available to Departments, Services and all NPIO's.
- Chargeback functionality.

Clarity PPM v12 Upgrade Considerations

- **Upgrade to 8.1 Considerations** continued
 - Service Management
 - New functionality – consideration for implementation.
 - Business Relationship Manager
 - Should the new content be deployed during an Upgrade?
 - Security
 - All security changes should be reviewed as part of an upgrade.
 - What will be the impact if no security updates are made?

Clarity PPM v12 Upgrade Considerations

➤ Upgrade to v12 Considerations

- Integrate with Microsoft SharePoint to extend visibility of critical project information.
- Implement the CA Productivity Accelerator to increase user adoption by providing a tool for developing customer-specific documentation, training and support.
- Implement the Idea NPIO.
- Use the CA Clarity PPM out-of-the-box solution for comprehensive product portfolio management.
- Implement new features of Requirements planning to have traceability throughout the project lifecycle and achieve higher business value as well as reduce project cost and failures.

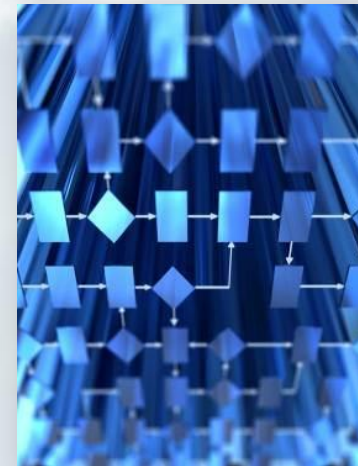
Clarity PPM v12 Upgrade Considerations

➤ Upgrade to v12 Considerations continued

- Integrate with Microsoft SharePoint to extend visibility of critical project information.
- XOG client users must upgrade to the CA Clarity PPM version of this client software.
- Versions of the CA Clarity Microsoft Project Interface prior to 8.0 are not compatible
 - A new version of Microsoft Project Interface is available with v12 and is recommended for use.
- Versions of Open Workbench prior to 8.0 are not compatible
 - A new version of Open Workbench (r1.1.8) is available with v12

Clarity PPM v12 Upgrade Considerations

- **Upgrade to v12 Considerations** continued
 - Complete the necessary Installation steps for New License Model Changes.



Conclusion

➤ Why upgrade?

- CA Clarity PPM v12 is the most stable, most feature-rich.
- CA Clarity PPM release is free for customers on maintenance.
- New platforms, add-Ins, features, and continued stability.

➤ What can I expect?

- Streamlined upgrade experience.
- Significant effort to move from CA Clarity PPM r7.5.3 to r8.1. BUT less for CA Clarity PPM r8.1 to v12.0.
- Assistance with Studio Views migration now built-in.



Questions?

Visit Digital Celerity's Knowledge-Share Library for Free Informative CA Clarity PPM Community Content

[http://www.digitalcelerity.com/Pages.aspx/
Knowledge-Share-Library](http://www.digitalcelerity.com/Pages.aspx/Knowledge-Share-Library)



Sharing Knowledge, Exchanging Ideas, Building Community