

TECHNOLOGY AUDIT

CA Clarity PPM 8







CA

BUTLER GROUP VIEW

ABSTRACT

CA Clarity PPM 8 marries the strategic to the tactical, by coupling top-down portfolio planning and analysis with bottom-up project, programme, financial, and process management. The result is a seamlessly integrated Project Portfolio Management system. The solution gives executives a real-time view into the organisation's investments, initiatives, and resources, allowing managers to deliver controlled and predictable execution of projects, and programmes. There is out-of-the-box integration with other CA software, which creates a complete support sub-system, especially relevant to the change management scenario. Many organisations are moving towards providing IT as a service, which means that there is a need to widen the scope of Portfolio Management to encompass more than just new projects. New modules in CA Clarity PPM 8, such as IT Portfolio, IT Finance, and Business Relationship Manager address this very important wider requirement. Built around the core Project and Portfolio Management functionality are solution-specific components that support the critical processes of IT Governance, New Product Development, Risk and Controls Management, and Enterprise Programme Management. Created in a Web services architecture, CA Clarity PPM is comprised of a set of modules enabling phased implementations that can be as small as 50 users focused on Project Portfolio Management, or as extensive as 100,000 users employing all aspects of CA Clarity PPM. The solution is deployable on a large range of platforms and there is a strong emphasis on training and support, backed up by one of the world's largest IT companies.

KEY FINDINGS

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|  CA Clarity PPM addresses the wider requirements beyond strategic initiatives. |  Deployable in a modular fashion for incremental usage as the Project Portfolio Management processes mature. |
|  Highly configurable allowing users to work in the most productive manner. |  Based on open standards for easier integration to third-party tools. |
|  Out-of-the-box integration with other IT management solutions. |  The breadth and depth of functionality occasionally makes usability an issue for non-IT staff, something the company is actively addressing. |

Key:  Product Strength  Product Weakness  Point of Information

LOOK AHEAD

Enhancements to workflow, usability, and performance are planned for future releases.

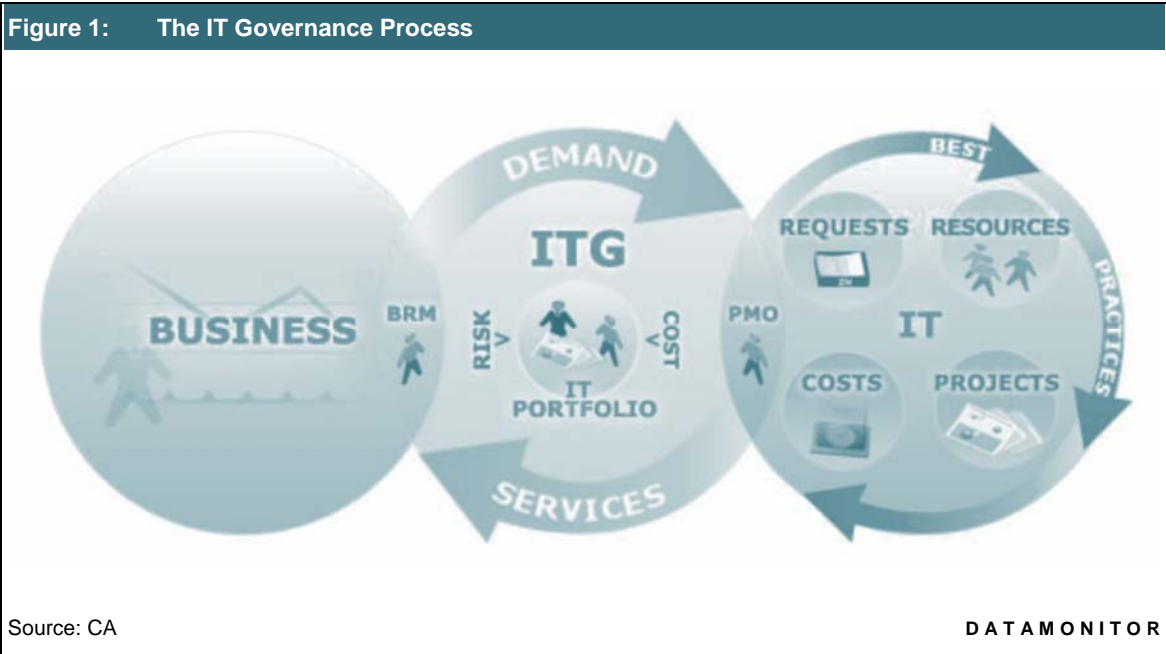
FUNCTIONALITY

Product Analysis

Better decision-making will be achieved if IT management has a good understanding and control of the current environment and a clear understanding of future requirements. Risk must be addressed at all levels of the IT function. Assessments must be made, both of the overall risk that is represented by the IT portfolio, and also of the risk associated with individual initiatives and projects. Many IT managers often see their role as purely to support the organisation, not realising that IT is at the heart of the enterprise. This leads to a lack of communication and can result in poor IT alignment with the objectives of the business.

For many organisations the IT investment cycle has been severely hampered by the lack of any formal approach or visibility. The result is that project and asset investments are often prioritised according to the available resource, rather than taking into account the business goals of the organisation. Factors such as immediate demand, internal politics, or even the personal agenda of the individual, also contribute to sub-optimal decision-making. Collecting project and service information into a structured portfolio provides a single source of information that then forms the basis for assessing the relative benefits, risks, and payback of new projects and existing services, as well as helping with the prioritising of initiatives, gaining investment approval, and understanding, allocating, and optimising available resources.

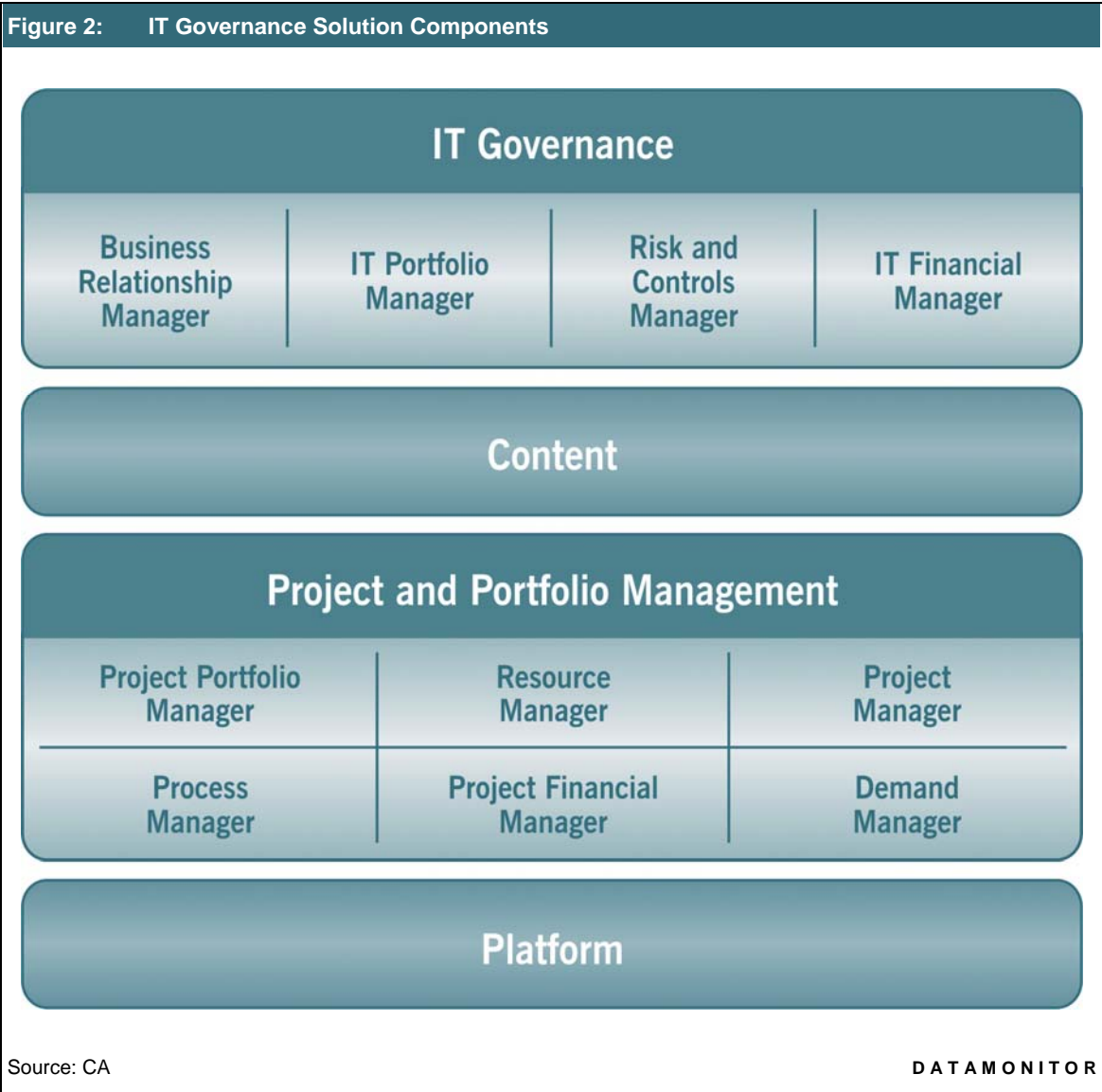
Amalgamating IT projects and services into one portfolio assists senior executives and IT managers to make better choices and can reduce overall contingency requirements. There is much talk within the IT industry about the need for Portfolio Management in an IT Governance context, which is beginning to become more widely used, as the market leading institutions make it an integral part of their IT investment management practices. It enables a wider, more important, and relevant view to be taken, as IT projects should not be allowed to exist in isolation. In fact, there is a school of thought that believes there should be no such thing as separate technology initiatives; they should all be elements of business projects, with justification and comparison of suitability and value being taken at the business project level. The shared involvement of IT and business people in the Portfolio Management process facilitates the understanding of the effects and value of IT initiatives.



The CA Clarity PPM solution provides comprehensive portfolio analysis and assessment to improve the decision-making process, together with project, resource, and financial management to ensure the successful delivery of IT projects and programmes. For example, by having Business Relationship and Demand Management capability integrated with Project and Portfolio Management, the business user or the Business Relationship Manager (BRM) has one point of entry for viewing and requesting, or subscribing, to IT services. Additionally, bi-directional integration between project management and enterprise change management ensures that software development tasks needed to support a project are seamlessly activated, while resource costs are automatically updated at the project level. This level of integration is important, since it avoids development delays, and provides IT management with complete and accurate insight into the total cost of an IT service.

Product Operation

CA Clarity Project Portfolio Manager is an integrated suite of modules that allows the organisation to manage its services, projects, products, people, and financials. It gives executives a view into the organisation’s investments, initiatives, and resources, and empowers managers to deliver controlled and predictable execution of projects, and programmes. Created in a Web services architecture, the CA Clarity PPM system is comprised of a set of modules, content, and an underlying platform. The system’s modular structure enables phased implementations that can be as small as 20 users focusing on Portfolio Management, or as extensive as many tens of thousands of users utilising all aspects of the system.



Modules

- **IT Portfolio Manager** – introduces the concept of a service offering, a hierarchy to capture all the investments needed to deliver a service, and the capability of performing service-level portfolio analysis.
- **IT Financial Manager** – includes service-based budgeting and forecasting, charge backs, single invoices, and cost recovery statements.
- **Business Relationship Manager** – supplies portals and dashboards designed to improve and facilitate the ability of IT to engage with the organisation in the area of service delivery.
- **Demand Manager** – provides a single view of resource demand and utilisation, which allows organisations to prioritise work in the most effective manner.

- **Project Financial Manager** – has extensive capabilities including billing, invoicing, and chargeback facilities all available in multiple currencies.
- **Project Portfolio Manager** – provides a structured environment for deciding which projects, programmes, or initiatives to fund; which to sustain, and which to cancel. Tight integration with the other CA Clarity PPM modules allows organisations to perform both bottom-up analysis and top-down planning.
- **Process Manager** – allows all business processes to be managed as a unified whole, making it easier to optimise processes and standardise them across the entire organisation. It also supports phase-gate methodologies, ensuring that best practices are adhered to throughout the organisation.
- **Project Manager** – provides functionality for project planning, estimating, budgeting, resource allocation, and time capture to ensure corporate best practices are adhered to and projects are executed with precision. It integrates with both Open Workbench and MS Project, allowing organisations to launch the preferred scheduling tool directly within CA Clarity PPM.
- **Resource Manager** – helps plan and manage resource capacity and balance it against work demand. Comprehensive capacity planning allows organisations to focus on critical areas by highlighting capacity and demand overloads by organisation unit, project, or roles.
- **New Product Development** – is a knowledge-based tool for the capture and centralised storage of innovation ideas, which provides an environment for the better understanding of those projects that will bring real value to the organisation.
- **Open Workbench** – is an open source alternative (www.openworkbench.org) to Microsoft Project, providing desktop project scheduling, off-line scheduling, Gantt and PERT charts, automatic 'what-if' resource scheduling, inter-project dependency tracking, and a customisable view library.

Content

- **Risk and Controls Manager** – supplies a global repository that maps internal policies, procedures, and SLAs, along with external regulatory requirements to existing or new risks and controls.
- **Earned Value Management Report Pack** – delivers additional Earned Value metrics, portlets, and reports in CA Clarity PPM.
- **Advanced Resource Management Report Pack** – provides a set of commonly-used metrics and reports for managing resources and monitoring resource performance.
- **PMO Accelerator** – features over 20 portlets, reports, and queries that enable new or existing PMOs to quickly adopt proven practices in project and resource management methodology.

Platform

CA Clarity PPM Studio is used to tailor the system, helping to develop and deploy local configurations, as well as personalised user interfaces. It allows the creation of a work environment in which information is delivered and actions are taken. The system is scalable from 50 users up to 50,000 users, due to a personalised UI and the G2000 Architecture (a three-tier J2EE-compliant design). The platform employs a wide variety of modern best practices, such as zero applets or downloads, compressed HTML, fail-over, Precision Security, and many others.

CA Clarity PPM can be integrated with IT service, asset, and change management applications, as well as ERP systems and desktop schedulers. Schedule Connect provides bi-directional integration between CA Clarity PPM and Open Workbench or Microsoft Project. The Service Connect suite includes a number of pre-built integration connectors to IT Service Management systems, such as Remedy Help Desk.

Product Emphasis

Although CA Clarity PPM is comprised of a set of integrated stand-alone modules, which allows organisations to implement specific functionality as needed, there is a larger picture. Enhancements to Clarity have focused on two key areas: engagement and efficiency. The first is about providing the tools to improve the engagement between IT and its business customers to enhance visibility, decision making, and accountability. The second is about helping IT to continue to improve its efficiency in managing people, projects, budgets, and demand. CA Clarity PPM is uniquely positioned to support organisations as they look to manage existing and future IT processes and services using a Portfolio Management construct, within an IT Governance framework.

DEPLOYMENT

CA Clarity PPM is based on an open *n*-tier architecture with full J2EE compliance, built using Java, XML, and XSL, using both open source and custom written libraries. The application server serves up Web pages and requests from client applications using XML. CA Clarity PPM is delivered on physical media, by electronic distribution and by ASP on a tailored basis. Core implementation services are provided by both CA Professional Services as well as partners, such as BearingPoint, CapGemini, Infosys, ATOS Origin, Ementor, Hitachi Consulting, and WHITTMANHART. Additional services, such as PMO setup and execution, methodology authoring, and business process re-engineering, are provided through specialised partners.

Implementation time is dependant on the size and complexity of the instantiation, as well as customer resource availability and a deployment model. A '30-Days-to-Clarity' implementation package is available for those organisations requiring a quick Return On Investment (ROI), reducing the risk for new customers by packaging a defined set of functional deliverables into a 30-day, fixed-price package. CA Upgrade Assessment and Implementation packages have been developed to reduce the risk of upgrading to CA Clarity PPM 8 by assessing readiness and using proven practices to reduce the learning curve.

CA Clarity PPM service levels and timing range from complete outsourcing of the entire implementation (including project management, training, user acceptance testing, and all technical services with a full-time on-site CA team), to simply providing implementation guidance with minimal oversight. Typical implementation times range from 30-60 days for workgroup deployments, 3 to 6 months for divisional deployments, and 6+ months for large-scale enterprise roll-outs.

Customers need comprehensive training to ensure that they are productive and effective when working with software. To this end, CA offers a full breadth of training services for CA Clarity PPM including:

- Web-Based Training – the curriculum is designed to provide customers with a highly scalable, interactive, consistent, and cost effective approach to training both project teams and end users.
- Instructor-Led Training – provides a traditional training experience where a certified leader guides students through a topic using a manual and exercises to re-enforce the learning.

- Boot Camps – an accelerated certification program offers project teams an experience of total immersion in an implementation simulation without distractions so they will emerge with thorough knowledge of CA Clarity PPM.
- Fast Track Certification – offers partners the opportunity to become certified without attending Boot Camp.
- CA's CA Clarity PPM training is certified by the Project Management Institute, and all public and Web-based Training courses are registered for PDU credits.

CA Clarity PPM runs on the Sun Solaris, Microsoft Windows, HP-UX, Red Hat or SUSE Enterprise Linux, and IBM AIX platforms. The solution also requires either Oracle or Microsoft SQL databases, and utilises Microsoft Windows or Macintosh OS X (with Firefox) client operating systems.

PRODUCT STRATEGY

CA Clarity PPM is part of a larger planning and control solution from CA that provides a modular approach to delivering a comprehensive, integrated business services solution that eliminates disparate systems, automates manual processes, and improves access to real-time information for decision making. Portfolio Management solutions are no longer islands disconnected from the rest of the IT management processes, and CA is well-positioned to offer an integrated enterprise IT management solution.

CA Clarity PPM's range of functionality has been extended by out-of-the-box integration with CA's Unicenter Service Desk, Harvest Change Manager, and Unicenter Asset Portfolio Manager. This creates a strong proposition for the control of change management within the organisation. There is a strong emphasis on the CA Clarity PPM sales model driving the product forward in the market and significant investment in the solution both in terms of enhancements and quality. It is clear that CA Clarity PPM has a value proposition that is well-understood by organisations and that the product will continue to be a major driving force for CA, especially when allied with the change management space.

The solution is configured, not customised. The data model can be extended, the UI tailored, the workflows extensively modified, and system partitions can be created. All this tailoring can be performed by business analysts undertaking a '*fill-in-the-blanks*' process. The advantage is that this ensures fast implementations, agile system changes as requirements and processes evolve, and future-proofed deployments, as all configurations are automatically carried forward to new implementations.

CA Clarity PPM's target market is large global organisations in any industry sector. The company sells the solution through its channel partners programme made up of Value Added Resellers (VARs), international distributors, vertical solution providers, and reselling System Integrators, as well as having partnerships in place with a number of leading consultancies, selected for their experience, industry-specific knowledge, customer relationships, and complementary product solutions. Typical implementation projects range in size from US\$150,000 to US\$250,000. CA Alliance partners also include enterprise software, hardware, and network infrastructure organisations. These partners collaborate with CA to provide complementary solutions to CA Clarity PPM, as well as participating in joint sales and marketing activities with the company.

COMPANY PROFILE

CA, Inc. (NYSE:CA), positions itself as one of the world's largest management software companies. It delivers software and services across operations, security, storage, life cycle, and service management, to help organisations optimise the performance, reliability, and efficiency of their enterprise IT environments. Founded in 1976, CA is headquartered in Islandia, N.Y., has 15,000+ employees, operates in more than 100 countries, and has achieved ISO 9001:2000 certification.

Revenues and operating income for the last three fiscal years (ending 31 March) were as follows:

Table 1: Financial Details			
	2006	2005 (restated)	2004 (restated)
Revenue (US\$ Million)	3,796	3,603	3,332
Change on Previous Year (%)	5.36%	8.13%	9.00%
Total Net Income/(Loss) (US\$ Million)	159	24	(28)

Source: CA DATAMONITOR

CA has a stated policy to enhance and protect its clients' IT investments by integrating a wide range of systems in heterogeneous environments. To maintain this stance it has a wide range of partnerships with technology vendors, systems integrators, and IT consultancies.

Global Alliance Partners include:

- BEA Systems, Inc.
- BearingPoint, Inc.
- Capgemini.
- Cisco Systems, Inc.
- Computer Sciences Corporation (CSC).
- Dell Corporation.
- Deloitte.
- EDS.
- IBM.
- Intel Corporation.
- McKesson Information Solutions.
- Microsoft Corporation.
- Oracle.
- PricewaterhouseCoopers LLP.
- SAP AG.
- Siebel Systems, Inc.
- Unisys.

CA currently serves 99% of the Fortune 1000 companies across every major industry worldwide.

SUMMARY

CA Clarity PPM has long been seen in the market as a leading solution in the Portfolio Management space, with a host of functionality that answers many of the problems of creating real value from IT investments. The acquisition of the technology by CA extends this in many different areas and allows the product to become an essential part of a larger management sub-system, whilst still retaining its individual functionality.

The modular approach to deployment ensures that organisations can implement the solution in a manner that is most relevant to them in a non-disruptive fashion. In that respect, it is a solution that is highly relevant to large organisations in many market sectors. The use of up-to-date information presented in ways that are configurable to take account of the way that people work ensures that management of IT and organisational assets is both usable and relevant to organisational requirements.

Table 2: Contact Details	
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Source: CA	DATAMONITOR

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