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PPM 9.40: How the New Features of HPE PPM can Help your PMO

October 4, 2016

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Enterprise**



Hosted By



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PPM SIG Leader



Today's Speaker



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Housekeeping

- This “LIVE” session is being recorded
Recordings are available to all Vivit members
- Session Q&A:
Please type questions in the Questions Pane



Webinar Control Panel

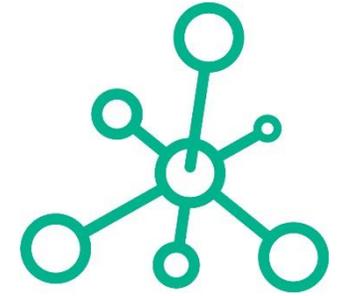
Toggle View Window between Full screen/window mode.

Questions





**Hewlett Packard
Enterprise**



HPE Project and Portfolio Management

How you can use the new features in PPM 9.40



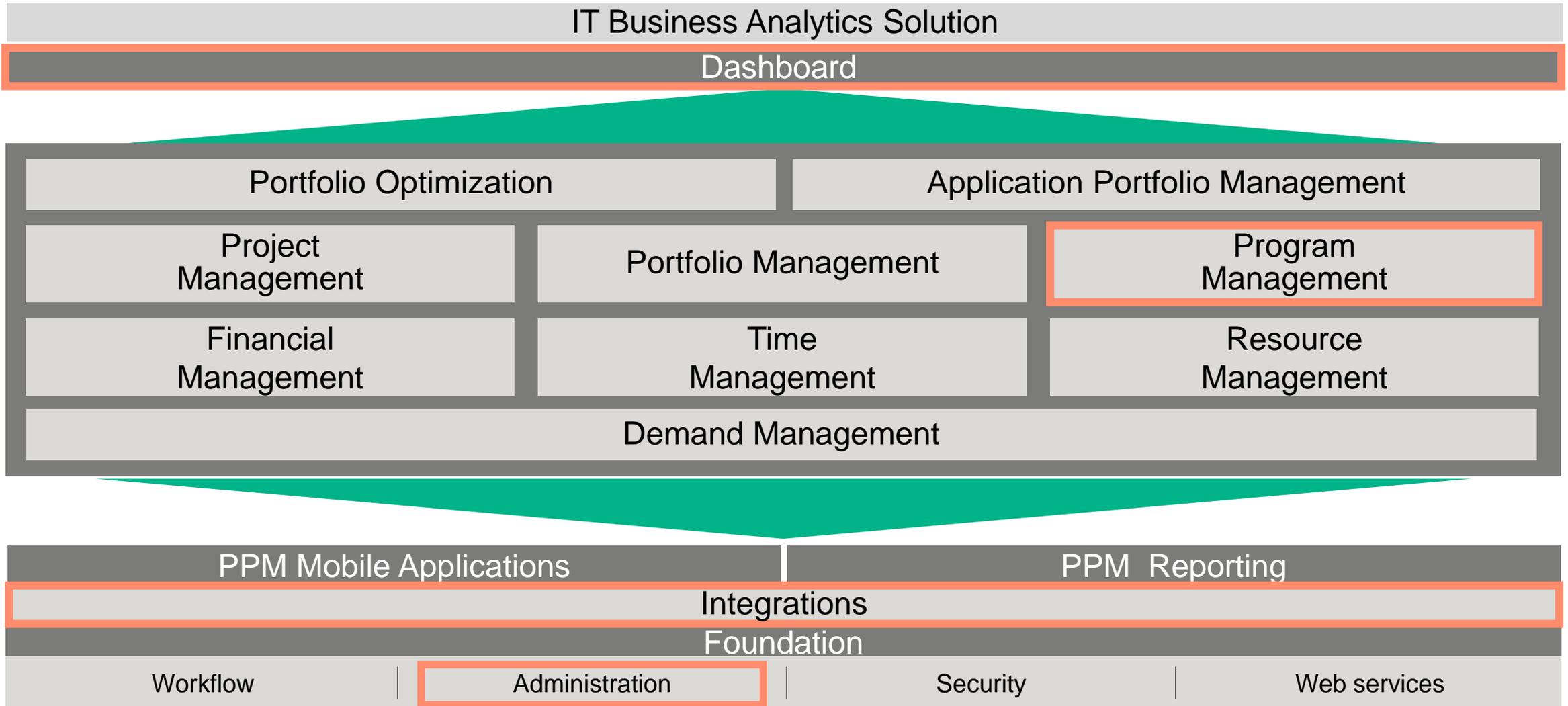
HPE Project and Portfolio Management solution overview

Dashboards

**Integrated set of capabilities for portfolio, project, program,
resource, demand, financial and time management**

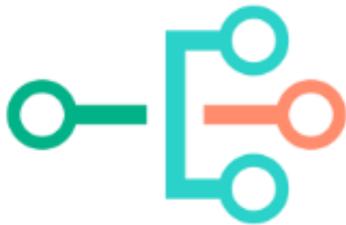
Platform

HPE Project and Portfolio Management solution



Program management

- Program request type / workflow
- Program type
- Program health
- Program UI



Agile management

- Capability
- Configuration
- Mapping wizard
- PPM -> Agile release
- Time sheets
- Upgrade impacts

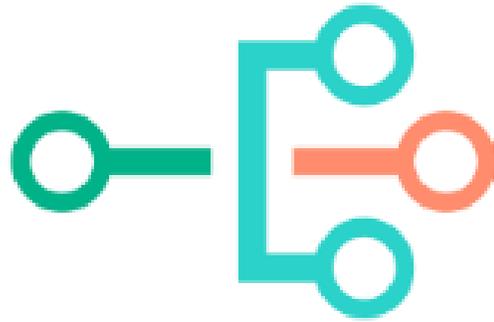


User administration

- Capabilities
- Technical info



Program management



Program request type / workflow

Program Process Request type

- Offer an OOTB request type "Program Details"
- Request type containing "PFM Program" field group can be selected as a program request
- Fields and workflows can be user-defined and these will be shown on Program Details tab

Provides auditable program governance and process.

The screenshot displays the 'Modify Program Type - Enterprise' interface. The 'Program Type' is set to 'Enterprise', and the 'Program Process Request Type' is set to 'Program Details'. The 'Enable This Program Type' is checked. The interface shows a sidebar with 'Financial Management' selected. The main area displays the 'Request Type: Program Details' configuration, including fields for 'Request Type Name', 'Creation Action Name', 'Category', 'Extension', and 'Description'. A workflow diagram is overlaid, showing the process flow from '1. PGM - New' to '2. PGM - Launch Program', '3. PGM - Active', '4. PGM - Hold Program', '5. PGM - On Hold', '6. PGM - Complete Program', and '7. PGM - Completed - 100%'. A legend indicates 'visited' (blue) and 'active' (green) steps. A detailed view of the 'Program Details' form is also shown, including fields for 'Program Name', 'Sponsor', 'Program Health', 'Associated Portfolio', 'Benefit', 'Status Notes', and 'Detailed Description'.

Program Type

View Usage

A list shows that which programs are using this program type

Enable This Program Type

Program type can be selected when creating a program if it is enabled.

Allow program manager to override the setting

Changes to program settings do not apply to existing programs if enabled. Otherwise settings are copied.

Modify Program Type - Enterprise [View Usage](#) Save Done Cancel

Program Type: Enterprise

Description:

Program Process Request Type: Program Details

Enable This Program Type: Yes No

Select a policy to configure:

- Financial Management Allow program manager to override the setting
- Portfolio Management
- Program Health
- Issue/Risk Request Types

Enable Financial Management for this program
Enabling Financial Management allows you to view financial information of this program.

Settings are set by the Program Management Office (PMO)

Save Done Cancel

Note: Disabling program type does not impact closed programs

Program type settings

Program Health

- Track *issue* health for this program (previously available)
- Track *risk* health for this program (previously available)
- Track *scope change* health for this program (previously available)
- Track *overall program* health for this program (NEW!) 

Now calculated and can be locked down

Modify Program Type - Enterprise [View Usage](#) Save Done Cancel

Program Type:

Description:

Program Process Request Type:

Enable This Program Type: Yes No

Select a policy to configure:

- Financial Management
- Portfolio Management
- Program Health**
- Issue/Risk Request Types 

Program Health

Allow program manager to override the setting

Track issue health for this program
The issue health of the program is determined by adding up the weights of all the program issues. Below you can specify the weight for the issue, based on its priority.

Priority	Weight
Low	0
Normal	1
High	3
Critical	5

Issue health	Threshold value of the health
 At-risk	20
 High-risk	40

Track risk health for this program
The risk health of the program is determined by adding up the weights of all the program risks. Below you can specify the weight for the risk, based on its impact and probability.

Impact	Weight
Level 1	5
Level 2	3
Level 3	1

Probability	Weight
High [26-100%]	5
Medium [11-25%]	3
Low [0-10%]	1

Risk health	Threshold value of the health
 At-risk	20
 High-risk	

Program Overview Page

- Program header provides executive summary
- Detailed program information summarized from the program contents
- Basis for management by exception

'More' button

Program: ITOM FY16 (#35958)

Progress: 97%

Duration: 3/1/12 - 9/30/16

Program Managers: Carolyn Sayer

Status: Active

Status Notes: Currently in work.

User-selected health: On-track

Action required:

11 Issues 16 Risks 12 Scope changes 3 Business objectives

Actual Cost: **USD379,310**
Budget: USD200,000

Overview | Details | Timeline | Cost | Notes | References

Content Include Closed Add Remove

Id	Type	Health	Name	Manag...	Status	Cost Health	Issue Health	Schedule ...	Percen...	Sched...	Sched...
30608	Project	▲	ACME Intranet	Bev Bailey	Assign Proj...	■	■	●	1%	3/1/12	10/31/13
30630	Project	■	Web for One...	Carolyn Say...	Detailed Pro...	■	■	■	5%	1/1/13	9/30/16
30633	Project	▲	Billing Syste...	Joseph Banks	Detailed Pro...	●	■	●	9%	1/1/13	9/30/13
30631	Project	▲	PPM Progra...	Joseph Banks	Detailed Pro...	●	■	●	0%	7/1/13	3/31/14
30632	Project	▲	APO - Pilot	Alex Smith; ...	Construct	●	■	▲	34%	10/1/12	8/31/14

Issues (11)

Bar chart showing issues and program-level project issues. X-axis: High, Low, Medium, Normal. Y-axis: Count.

Issue #	Project	Priority	Status	Description	Assignee
30312	APO - Pilot	Critical	Open	Siebel QA serve...	Mandy Rice
30277	Billing Systems I...	High	New	Several addition...	
30313	PPM Program M...	High	New	Siebel training s...	
30193	Web for One World	High	New	Delivery of new ...	
30315	Web for One World	High	New	Contract Issue w...	

More button contents



- Program Settings
- Configure Access
- Program Audit Trail

Program Header

- View progress, duration, Program status, associated portfolio
- Program progress = (Current date - Program start date) / Program duration
- Program duration is fetched from the earliest start date of the underlying project to the latest finish date of the underlying project
- Showing associated portfolio when Portfolio Management is enabled for this program
- Status is workflow status

Program: ITOM FY16 (#35778)

Progress: 97%

Duration: 12-10-1 - 16-9-30

Program Managers: Carolyn Sayer

Status: Active

Status Notes: Currently in work.

User selected health: At-risk

10 Issues, 14 Risks, 12 Scope changes, 2 Business objectives

Actual Cost: USD 372,160
Budget: USD 200,000

Program: ITOM FY16 (#35958)

Progress: 97%

Duration: 10/1/12 - 9/30/16

Program Managers: Carolyn Sayer

Portfolio: No Associated Portfolio

Status: Active

Status Notes: Currently in work.

Business Objectives

Name	State	Owner	Priority	Description
15% Growth in Partner Channels	In Progress			
10% Increase in Revenue	In Progress			

Program Header

- Program overall health can be calculated and overridden.

Note: Allow program managers to override the program's calculated health needs to be enabled in program type for overriding program health
- If issue health, risk health, and scope change health are tracked, the total number and the health are shown
- Business objective shows the number of business objective
- Clicking these indicators, page jumps to corresponding section

The screenshot displays a program header for 'ITOM FY16 (#35778)'. At the top, it shows a progress bar at 97%, duration from 12-10-11 to 16-9-30, program manager Carolyn Bayer, and status 'Active'. A summary box highlights 'User selected health' as 'At-risk' (yellow triangle), with 10 issues, 14 risks, 12 scope changes, and 2 business objectives. A cost gauge shows 'Actual Cost USD 372,160' and 'Budget USD 200,000'. Below this, a 'User-selected health' section shows 'At-risk' (yellow triangle) with a callout 'Not calculated view'. A summary row shows 10 issues, 14 risks, 12 scope changes, and 2 business objectives. An 'Overridden health' section shows 'On-track' (green checkmark) with a callout 'Calculated but overridden view', a description 'Testing program program health override', and an 'Action required' row showing 11 issues, 16 risks, 12 scope changes, and 3 business objectives. A table of business objectives is at the bottom.

Name	Status	Owner	Priority	Description
15% Growth In Partner Channels	In Progress			
10% Increase In Revenue	In Progress			

Program Header

- Showing budget and actual cost of program
- Only shown when Financial Management is enabled in program type
- If actual cost is greater than budget, the color of cost is red, otherwise it is green
- If one of cost and budget is negative or both of them are negative, it shows a warning icon

Program: ITOM FY16 (#35778)

Progress: 97%

Duration: 12-10-1 - 16-9-30

Program Manager: Carolyn Bayer

Status: Active

Status Notes: Currently in work.

User selected health: At-risk

10 Issues, 14 Risks, 12 Scope changes, 2 Business objectives

Actual Cost: USD 372,160, Budget: USD 200,000

Actual Cost: -USD1,234,123,823, Budget: USD1,030,000

Last updated: 8/17/16 5:48:00 AM UTC
Scheduled for next update: 8/17/16 5:49:00 AM UTC

Actual Cost: USD379,310, Budget: USD200,000

Warning icon

Identifies when updates are pending

Program Overview page tabs

Tabs of Program

- Overview/Summary
- Details
- User Data
- Timeline
- Cost
- Notes
- References

Program: ITOM FY16 (#35778)

Progress: 97%

Duration: 12-10-1 - 16-9-30

Program Managers: Carolyn Bayer

Status: Active

Status Notes: Currently in work.

User selected health: **At-risk**

10 Issues, 14 Risks, 12 Scope changes, 2 Business objectives

Actual Cost: USD 372,160
Budget: USD 200,000

Navigation tabs: Overview (selected), Details, User Data, Timeline, Cost, Notes, References

Id	Type	Health	Name	Managers	Status	Cost He...	Issue He...	Schedule...	Percent ...	Schedule...	Schedule...
30630	Project	▲	Web for One W...	Carolyn Bayer...	Delayed Proje...	▲	▲	▲	5%	19-1-1	16-4-20
30633	Project	▲	Billing System...	Joseph Banks	Delayed Proje...	●	●	●	12%	13-1-1	13-9-30
30631	Project	▲	PPM Program ...	Joseph Banks	Delayed Proje...	●	●	●	0%	13-7-1	14-3-31
30632	Project	▲	APO - P/td	Alex Smith, Al...	Construct	●	●	▲	60%	12-10-1	14-6-31

Risks (14)

Risks include program risks and project risks.

Risk #	Project	Probability	Impact L...	Status	Description	Assignee
30309	PPM Program M...	Low	New	Additional relat...		
30312	APO - P/td	Critical	Open	Stabel QA server ...	Mandy How	
30277	Billing System...	High	New	Several addition...		
30313	PPM Program M...	High	New	Stabel training se...		

Scope Changes (12)

Scope changes include level 1 and 2 project scope changes.

Scope C...	Project	Severity	Change ...	Status	Description	Assignee
30307	Billing System...	Critical	Level 2	New	PeopleSoft up...	
30418	Web for One ...	Critical	Level 1	New	Screen layout ...	
30439	APO - P/td	High	Level 2	New	PeopleSoft up...	
30432	PPM Program ...	High	Level 2	New	New edition n...	
30419	Web for One ...	High	Level 2	New	User access tag...	

Business Objectives

Name	Status	Owner	Priority	Description
15% Growth in Partner Channels	In Progress			
10% Increase in Revenue	In Progress			

Program Overview/Summary tab

- Content
 - Issues, Risks, Scope Changes
 - Business Objectives
- Can filter table content by clicking on bar in chart
 - Can sort table by clicking on a column heading

Note: Content changes on this tab are automatically saved; filter and sort options are not saved

Content Include Closed [Add](#) [Remove](#)

Id	Type	Health	Name	Managers	Status	Cost Health	Issue Health	Schedule Health	Percent ...	Schedul...	Schedul...
30630	Project	■	Web for One...	Carolyn Sayer...	Detailed Proje...	■	■	■	5%	1/1/13	9/30/16
30633	Project	▲	Billing System...	Joseph Banks	Detailed Proje...	●	■	●	9%	1/1/13	9/30/13
30631	Project	▲	PPM Program ...	Joseph Banks	Detailed Proje...	●	■	●	0%	7/1/13	3/31/14
30632	Project	▲	APO - Pilot	Alex Smith, Ali...	Construct	●	■	▲	34%	10/1/12	8/31/14

■ **Issues (10)**
Issues include program issues and program-level project issues. [Add](#)

Issue #	Project	Priority	Status	Description	Assignee
30312	APO - Pilot	Critical	Open	Siebel QA server ne...	Mandy Rice
30277	Billing Systems Integ...	High	New	Several additional ia...	
30313	PPM Program Mgmt ...	High	New	Siebel training server...	
30315	Web for One World	High	New	Contract issue with V...	
30193	Web for One World	High	New	Delivery of new hard...	

▲ **Risks (14)**
Risks include program risks and project risks. [Add](#)

Risk #	Project	Probability	Impact Level	Status	Description	Assignee
30165	PPM Program Mg...	Almost Certain [8...	High	New	Training conflicts ...	
30166	PPM Program Mg...	Almost Certain [8...	Low	New	Vendor support cl...	
30144	APO - Pilot	Likely [41-80%]	Low	New	Glitches in buildin...	Allen Hughes
30142	APO - Pilot	Likely [41-80%]	High	New	Key business sta...	Allen Hughes
30141	APO - Pilot	Likely [41-80%]	Medium	New	Hardware Procur...	Allen Hughes

● **Scope Changes (12)**
Scope changes include level 1 and 2 project scope changes.

Scope Cha...	Project	Severity	Change Re...	Status	Description	Assignee
30397	Billing Systems In...	Critical	Level 2	New	PeopleSoft upgra...	
30418	Web for One World	Critical	Level 1	New	Screen layout ch...	
30439	APO - Pilot	Hgh	Level 2	Pending Analysis	PeopleSoft upgra...	
30432	PPM Program Mg...	Hgh	Level 2	New	New division nee...	
30419	Web for One World	Hgh	Level 2	New	User won't signoff	

Business Objectives [Add](#)

Name	State	Owner	Priority	Description
✘ 9 Month Release Cycle	In Progress			
✘ 15% Growth in Partner Channels	In Progress			
✘ 10% Increase in Revenue	In Progress			

Program Details Tab

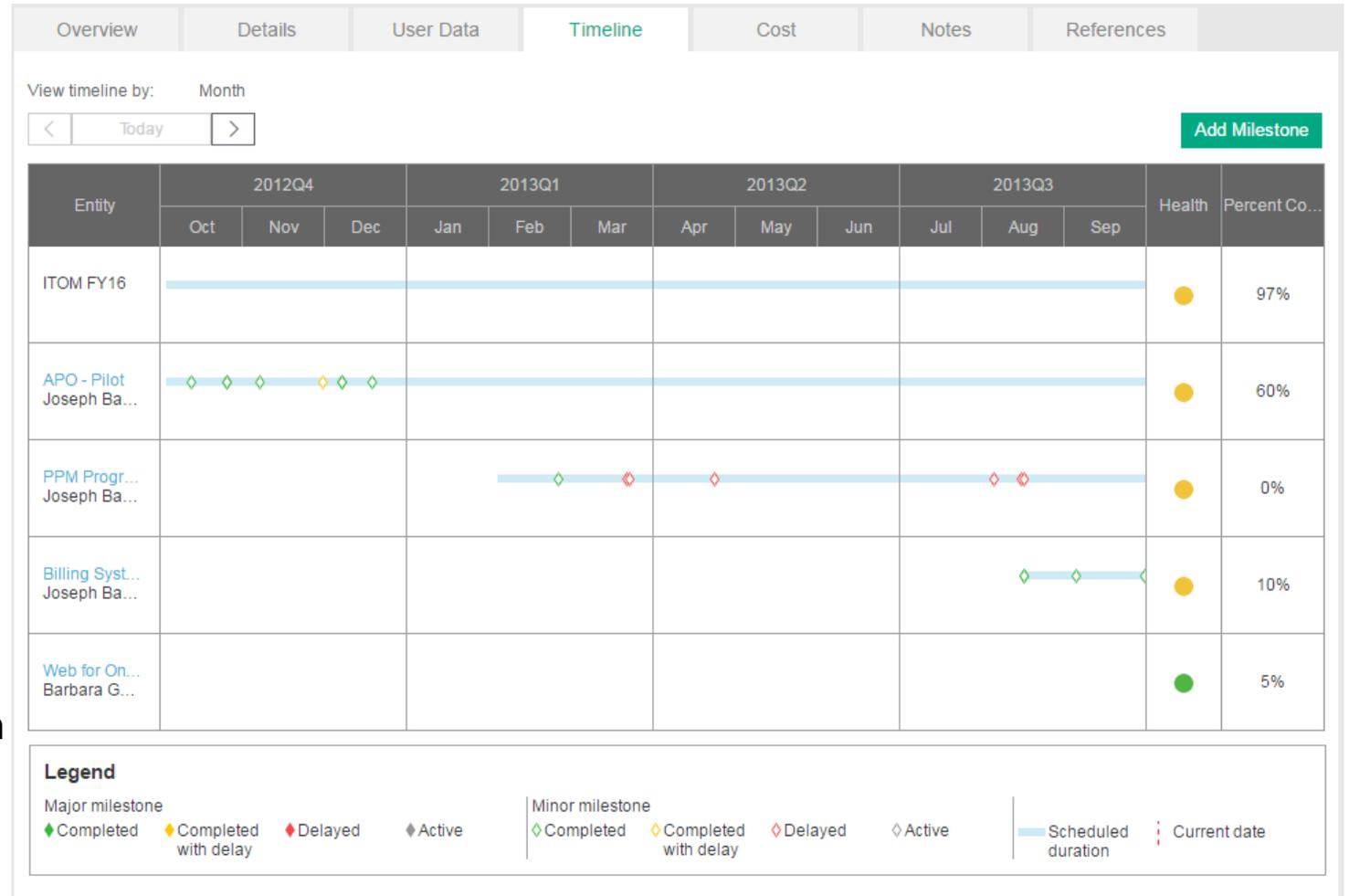
- Status is workflow status
- Provides documentation for the program request
- Upgrade program data is stored in program field group fields
- Customer specific fields can be added
- The same behavior and attributes as other requests

The screenshot displays the 'Program Details Tab' interface. On the left, a 'Jump To' sidebar lists 'Summary', 'PFM Program', 'Notes', and 'Status'. The main content area is divided into sections: 'Summary', 'PFM Program', 'Notes', and 'Status'. The 'Summary' section includes fields for 'Request No.', 'Created On', 'Program Status' (highlighted as 'Active'), and 'Description'. The 'PFM Program' section contains fields for 'Program Name', 'Sponsor', 'Program Health', 'Associated Portfolio', 'Benefit', 'Status Notes', and 'Detailed Description'. The 'Notes' section has an 'Add notes' button. The 'Status' section is a table with columns for 'Seq', 'Workflow Step Name', 'Step Status', 'Completed By', and 'Date'. At the bottom, there are links for 'Graphical View', 'Approval Details', and 'Transaction Details'.

Seq	Workflow Step Name	Step Status	Completed By	Date
1	PGM - New			
2	PGM - Launch Program	Eligible		March 16, 2016 04:38:50 AM UTC
3	PGM - Active			
5	PGM - On Hold	Upgrade	Admin User	March 16, 2016 04:38:50 AM UTC
7	PGM - Completed			
9	PGM - Cancelled			

Program Timeline Tab

- Provides the aggregated schedule and milestone information of projects in the program
- Can add program level milestones
- Projects sort by project start date, if same, sort by names
- Timeline can be viewed at Month Level only
- Project milestones can not be modified from within program
- Project percent complete is percentage complete for the workplan root task
- Hovering a milestone shows detail information, it will show a list if overlap



Program Timeline Tab – add milestone

- Program duration is based on the earliest project start date and the latest project finish date
- Program manager can add program milestones
- Program percent complete is program progress

The screenshot displays the 'Add Milestone' dialog box within the 'Timeline' tab of a software interface. The dialog is positioned over a timeline grid for the third quarter of 2013. The dialog fields are as follows:

- Name:** * [Empty text field]
- Type:** * Major (dropdown menu)
- Planned finish date:** * 2016-8-15 (calendar icon)
- Actual finish date:** [Empty text field] (calendar icon)
- Status:** * Ready (dropdown menu)
- Owners:** Amrish Jaisal (user icon)

At the bottom of the dialog, there are three buttons: 'Add' (green), 'Add more', and 'Cancel'. A red arrow points to the 'Add Milestone' button located in the top right corner of the dialog area. The background shows a timeline grid with columns for 2012Q4, 2013Q1, 2013Q2, and 2013Q3, and rows for various entities including ITOM FY16, APO - Pilot, PPM Progr..., Billing Syst..., and Web for On....

Program Cost Tab

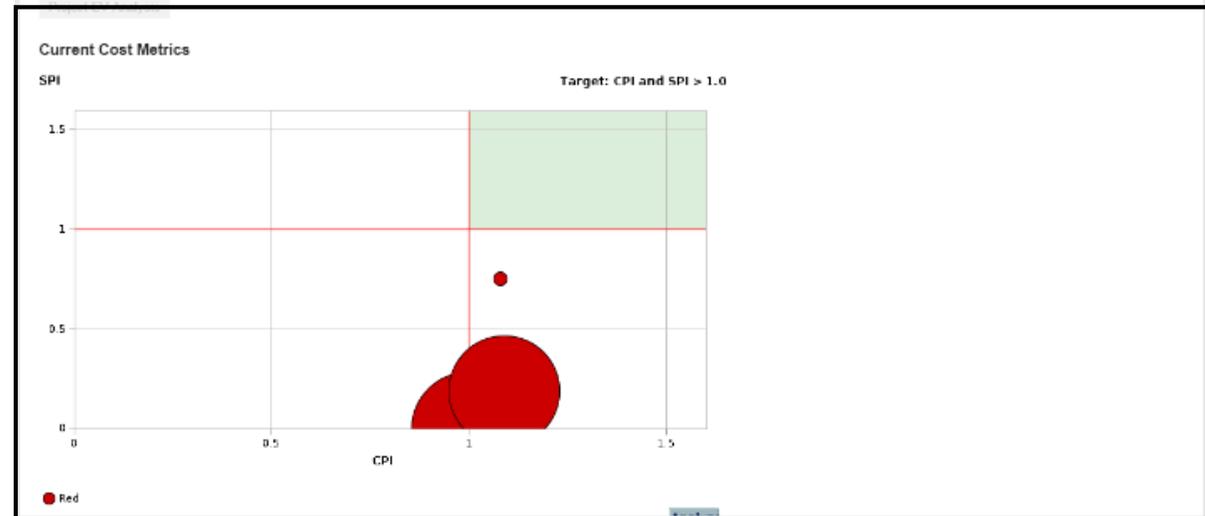
- Cost tab would be available only if Financial management enabled for the program type
- An entry to Financial Summary
- Showing program-related cost details
 - Program cost and program content cost
 - Earned Value Analysis
 - Current Cost Metrics

Program Cost																									
Capital Cost Forecast										Capital Cost Actual					Operating Cost Forecast					Operating Cost Actual					
Labor	USD 0										USD 0					USD 202,840,574					USD 232,160				
Non-Labor	USD 0										USD 0					USD 12,557,525,322					USD 140,000				
Total	USD 0										USD 0					USD 12,760,365,899					USD 372,160				

Type	Na...	M...	Co...	Pr...	C...	O...	Fo...	Fo...	Fo...	Fo...	Fo...	Fo...	Ac...	Ac...	Ac...	Ac...	Ac...	Ap...	Ap...
Project	Web lo...	Carol...	■	USD 570, USD 211, USD 358	USD 0	USD 0	USD 0	USD 575	USD 480, USD 1,051	USD 0	USD 174, USD 120, USD 294	USD 0	USD 0	USD 0					
Project	Billing ...	Joseph...	●	USD 1,15 USD 871, USD 287	USD 0	USD 0	USD 0	USD 1,02 USD 200, USD 1,221	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 12,21 USD 20,01 USD 32,2	USD 0	USD 0	USD 0
Project	PFM P...	Joseph...	●	USD 1,43 USD 1,23 USD 199	USD 0	USD 0	USD 0	USD 452, USD 860, USD 1,431	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0
Project	APO - ...	Alex S...	●	USD 12,7	USD 0 USD 12,7	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0	USD 0

Financial Summary: One World

Earned Value Analysis										
	Project Name	Cost Health	Actual Cost (AC)	Planned Value (PV)	Earned Value (EV)	Cost Variance	Scheduled Variance	SPI	CPI	
●	Web for One World	■	USD 84,720							
●	PPM Program	●	USD 0	USD 174,415	USD 0	USD 0	-USD 174,415	0	1	
●	APO - Pilot	●	USD 46,128	USD 66,215	USD 49,640	USD 3,512	-USD 16,575	0.75	1.08	



Agile Manager integration



HPE Agile Manager Connector

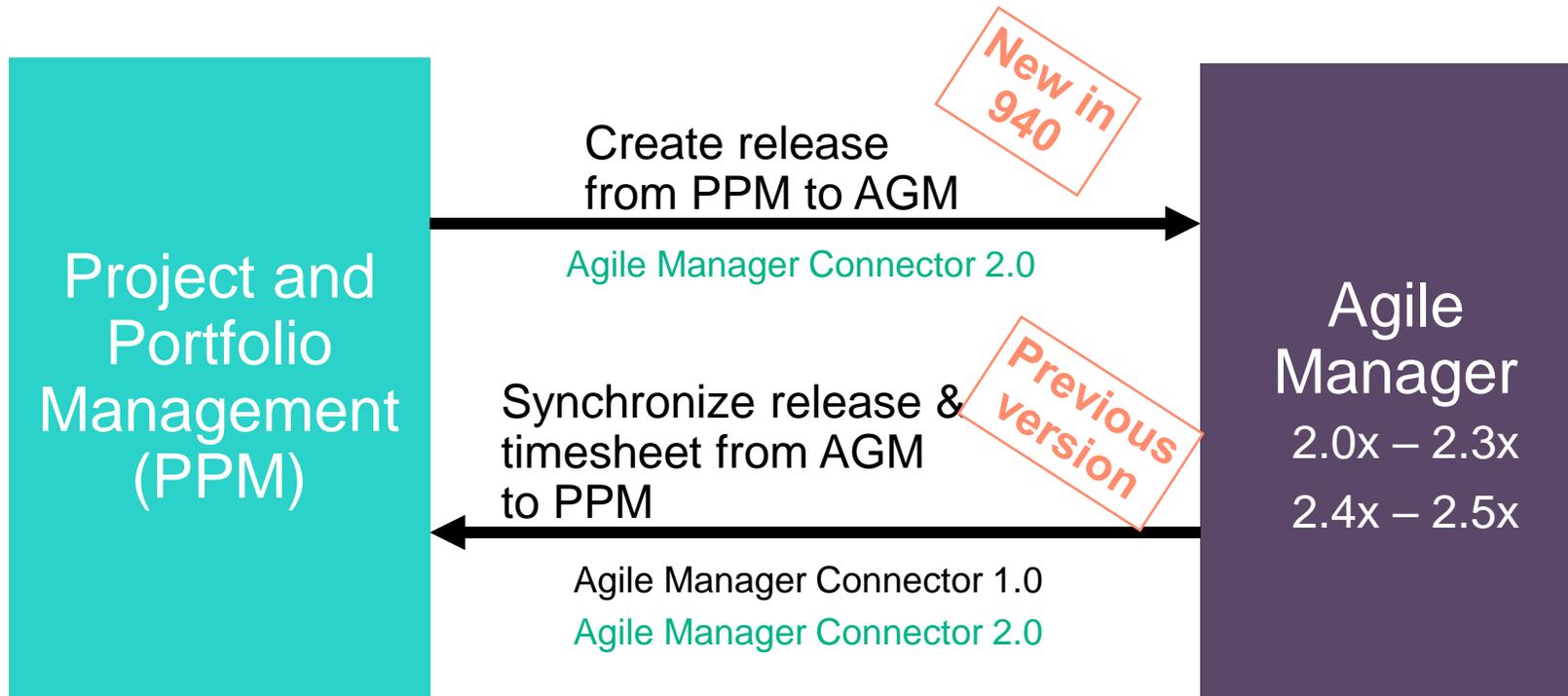
HPE Agile Manager Connector is now available out-of-the-box.

–Agile Manager Connector 1.0 for AgM 2.0x – 2.3x

–Agile Manager Connector 2.0 for AgM 2.4x and 2.5x

The screenshot displays the HPE Project and Portfolio Management Center interface. At the top, the Hewlett Packard Enterprise logo is visible on the left, and the title 'HPE PROJECT AND PORTFOLIO MANAGEMENT CENTER' is on the right. Below the title is a navigation bar with links: DASHBOARD, OPEN, SEARCH, CREATE, MY LINKS, HISTORY, and HELP, each with a dropdown arrow. A breadcrumb trail reads: Search Projects > Project Overview (tset) > Project Settings > Integration Configurations > Integration Configurations. On the left side, there is a sidebar menu with three items: 'Manage Application Change', 'View Project Quality', and 'Hybrid Project'. The main content area is titled 'Instances' and contains a list of three items: 'Agile Manager Connector 1.0 (Deprecated)' with a plus icon, 'Agile Manager Connector 2.0' with a plus icon and a sub-item 'AGM' with a badge showing '8', and 'Project and Portfolio Management Center' with a sub-item 'Local PPM Instance'.

PPM and Agile Manager Integration



Work plan Synchronization with Agile Manager Connector 2.0

The screenshot displays the 'Task Details' page for '2 - test phase I' in the Agile Manager Connector 2.0. The interface includes a navigation menu, a search bar, and a 'Task Details' section with various fields for Name, Status, Sequence #, % Complete, Activity, Priority, and Description. Below this, there are options to 'Mark task as milestone' and a 'Project Path' section. The main content area shows a 'Work Plan for testForTAW' with a table of tasks. The table columns include Seq, Name, Status, Scheduled Start, Scheduled Finish, Scheduled Duration, Scheduled Effort, Actual Start, Actual Finish, Percent Complete, Predecessors, Resources, and Role. The tasks listed include 'testForTAW', 'prepare for the online', 'test phase I', and several sprints (Sprint 1 through Sprint 7) with their respective dates and completion percentages.

Seq	Name	Status	Scheduled Start	Scheduled Finish	Scheduled Duration	Scheduled Effort	Actual Start	Actual Finish	Percent Complete	Predecessors	Resources	Role
0	testForTAW	In Planning	7/1/16	9/30/16	64	186	8/26/16		15.79%		Admin U...	
1	prepare for the online	Ready	8/1/16	8/24/16	18	144			0%			
2	test phase I	In Planning	7/1/16	9/30/16	64	42	8/26/16		20.69%			
3	Sprint 1	Ready	7/1/16	7/13/16	8	0			0%			
4	Sprint 2	Ready	7/15/16	7/27/16	9	0			0%			
5	Sprint 3	Ready	7/29/16	8/10/16	9	0			0%			
6	Sprint 4	In Planning	8/24/16	8/24/16	1	12			0%			
7	test UI	Ready	8/24/16	8/24/16	1	12			0%			
8	Sprint 5	In Planning	8/26/16	9/7/16	8	30	8/26/16		75%			
9	test back service	In Progress	8/26/16	9/7/16	8	12	8/26/16		50%			
10	test webserive 2	Complete	8/26/16	9/7/16	8	18	8/26/16	9/8/16	100%			
11	Sprint 6	Ready	9/9/16	9/21/16	9	0			0%			
12	Sprint 7	Ready	9/23/16	9/30/16	6	0			0%			



Project Managers



- Creating an Agile Manager release from PPM (NEW!)
- More options to control different synchronization details (NEW!)
- Getting Accurate Schedule/Actual Start/Finish date for User Story (IMPROVED!)
- Enable Estimated Remaining Effort for external task (NEW!)

Time sheet Synchronization with Agile Manager Connector 2.0

Admin User - Time Sheet for 8/16/16 - 8/31/16 (Unsubmitted)

Resource: Admin User Time Period: 8/16/16 to 8/31/16 Time Sheet #: 1 Status: Unsubmitted

Description: Admin User - 8/16/16 - 8/31/16

Import External Data

Select Instance User Configuration Confirmation

Available external items

Actions	Name	Effort (Hours)	8/16/16	8/17/16	8/18/16	8/19/16	8/20/16	8/21/16	8/22/16	8/23/16	8/24/16	8/25/16
X	TAW_Demo(t1_sa>Main)	33	0	0	0	0	0	0	27	0	6	0
X	test phase (t1_sa>Main)	24	0	0	0	0	0	0	0	0	24	0

Barbara Lewis - Time Sheet for 9/1/16 - 9/15/16 (Unsubmitted)

Resource: Barbara Lewis Time Period: 9/1/16 to 9/15/16 Time Sheet #: 1 Status: Unsubmitted

Description: Barbara Lewis - 9/1/16 - 9/15/16

Time Sheet Policies

Time Sheet Details (All times shown in hours)

Tab key goes to next: Item | Day

Item	Activity	Expected Hours	Thu 9/1	Fri 9/2	Sat 9/3	Sun 9/4	Mon 9/5	Tue 9/6	Wed 9/7	Thu 9/8	Fri 9/9	Sat 9/10	Sun 9/11	Mon 9/12	Tue 9/13	Wed 9/14	Thu 9/15	Total
External Data																		
<input type="checkbox"/>	AMS Presales-HP Media Store 2.0(147083...	0.0	0.00	6.50	0.00	0.00	3.00	8.00	4.00	5.00	5.00	0.00	0.00	8.00	2.00	1.00	1.00	43.50
<input type="checkbox"/>	AMS Presales-HP Media Store 2.5(147083...	0.0	0.00	1.50	0.00	0.00	5.00	0.00	3.00	3.00	3.00	0.00	0.00	0.00	6.00	7.00	7.00	35.50
Line Actions:			0.00	8.00	0.00	0.00	8.00	8.00	7.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	79.00



Team members

- Team members can track resource effort at task level (IMPROVED!)
- The effort the user is filled in AgM in a daily basis will be fetched (NEW!)



Adding an HPE Agile Manager Instance with AgM Connector 2.0

With the new integration connector, system admin should fill in **client id** and **client secret** apart from **base URL** and **Instance name** of HPE Agile Manager in the Integration configuration page.

HPE PROJECT AND PORTFOLIO MANAGEMENT CENTER

DASHBOARD OPEN SEARCH CREATE MY LINKS HISTORY HELP

Integration Configuration Demand Management Project Management Time Management Resource Management Program Management Portfolio Management Financial Management Deployment Management Reports

Administration

- Open Workbench on Desktop
- Open Administration Console
- Open User Management Console
- Edit My Profile
- View My Resource Information
- Schedule Services
- View Services Audit Page
- Download Microsoft Project Plug-in
- Demand Sets & Processes
- Project Types & Templates
- Financials
- Program Processes
- Portfolio Management
- Time Management
- Resource Management
- Regions
- Report Execution
- Portlet Definitions
- Modules
- Integrations

Update Instance

Agile Manager Connector 2.0 WP TS

* Instance Name
ElvaInstance

* Base URL
http://myd-vm03471.hpswlab.adapps.

Proxy Host Proxy Port Use Global Proxy

* Client ID
api_client_1_17

* Client Secret

Save Cancel

Used for work plan synchronization

PPM

AGM

Agile Manager Configuration Integrations API

Client ID	Site	Workspace	Description	Workspaces	Roles	Activation Date
api_client_1_4	testSusan	testSusan	testSusan	Default; GL_TESTING; PPM CPE	Site Administrator; Workspace Administrator; View	Aug 2, 2016 2:08:33 PM
api_client_1_5	testSusan	testSusan	testSusan	Default; GL_TESTING; PPM CPE	Team Member; Viewer; Workspace Administrator;	Aug 2, 2016 2:04:22 PM
api_client_1_7	jeff_test	jeff_test	jeff_test	Default; GL_TESTING; PPM CPE	Team Member; Viewer; Workspace Administrator;	Aug 2, 2016 4:56:06 PM
api_client_1_8	api_client_1_8	api_client_1_8	api_client_1_8	Default; GL_TESTING; PPM CPE; jht_test	Team Member; Viewer; Workspace Administrator;	Aug 2, 2016 6:30:33 AM
api_client_1_9	api_client_1_9	api_client_1_9	api_client_1_9	Default; GL_TESTING; PPM CPE; jht_test	Team Member; Viewer; Workspace Administrator;	Aug 2, 2016 6:30:33 AM
api_client_1_10	cheryng	cheryng	cheryng	Default; GL_TESTING; PPM CPE; jht_test; PPM Int	Team Member; Viewer; Workspace Administrator;	Aug 2, 2016 1:52:02 PM

Add New

Type: Application

Name: (0/255)

Description: (0/255)

Workspaces: Default; PPM CPE; ...

Roles: Filter... Select/Deselect All Default

Client Details

Client details generated. Copy the client secret to a secure location for use in your API. You will not be able to retrieve this secret again. If needed, regenerate the secret to receive a new one.

Your client id is :
api_client_1_17

Your client secret is :
FW8PhUdMydXuSec

Close

Mapping wizard in Task Hybrid Project tab

Creating an Agile Manager release from PPM (New!)

Hewlett Packard Enterprise | HPE PROJECT AND PORTFOLIO MANAGEMENT CENTER

Admin User | Sign Out

DASHBOARD OPEN SEARCH CREATE MY LINKS HISTORY HELP

Dashboard - Front Page > Search Projects > View Work Plan (#30440) > Task Details - testForTAW

Task Details: 0 - testForTAW

Statistics

Name: testForTAW Status: In Planning Sequence #: 0 Health: Admin User % Complete: 0 Activity: Priority: 0 Description:

Project Path: testForTAW

Schedule Contributions Notifications Notes References Hybrid Project

Select Instance User Configuration Confirmation

1 2 3

Agile Manager Connector 2.0 AGM

Username: sa Password: Password Domain: t1_sa Project: Main Workspace: Default Release: Sprint: Level of Details to Synchronize:

Create a New Release

Name: testForCreateRelease Description: testForCreateRelease

Start Date: 5/1/16 End Date: 5/1/16 Sprint Duration: Number Only

Sprint Duration Unit:

Release Information

Show Sprint Burn Down Chart Show Release Burn Up Chart Show Theme Status Chart Show Feature Status Chart

Back Next

hp Agile Manager Configuration Workspace Settings Templates Users Applications Fields Releases Teams Statuses ALI Summary Builds Code

testForCreateRelease

Release | ID 1053

Overview

- Remove Release
- Duplicate Release

Additional Settings

Sprints

Teams

Attachments

Description

testForCreateRelease

Release Time Frame

Start Date: May-01-2016 Sprint Duration: 2 Week(s)

End Date: Aug-01-2016 No. of Sprints: 7

Show More...

Release Timeline

May 2016 Jun 2016

Start: 01 May

Release Expected Capacity

No teams defined yet in this release

PPM

AGM

Check 'Create a New Release' and fill in the required information.

Mapping wizard in Task Hybrid Project tab

New! options have been added for better control on synchronization details

Field	Details of Changes
Workspace	Allow project manager choose a release under a specific workspace.
Release	Fetch all the releases that the login user has access to. The limitation that only list out the releases that contains today is removed.
Sprint	Allow project manager specify a sprint to map and only synchronize the specific sprint instead of a release.
Level of Details to Synchronize	Allow project manager to choose which level of details to synchronized. <ul style="list-style-type: none"> - All(Sprints & User Stories) - Sprint Only - Release total only

Viewing Agile Release Actual Data in Work Plan

Getting accurate schedule/actual start/finish date for User story

Schedule start:

If User story creation time is during sprint period, it will be User story creation time or it will be sprint's start time.

Actual start:

If User story status is not ready or complete percent is greater than 0, It will be User story schedule start time else, it will be null.

Actual finish:

If Complete Percent is less than 100% , it will be empty; if the task's last modify date is during user story's schedule time. It will be task's last modify date or else it will be user story's scheduled finish time.

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DASHBOARD ▾ OPEN ▾ SEARCH ▾ CREATE ▾ MY LINKS ▾ HISTORY ▾ HELP ▾ ★

View Work Plan (#30440) > Task Details - test webserve 2 > View Work Plan (#30440) > Task Details - test back service > View Work Plan (#30440)

Work Plan for testForTAW (In Planning : Health: ■) [Back to Project](#) [View Audit Trail](#)

Quick View ▾

Seq	Name	Type a search keyword	Status	Scheduled Start	Scheduled Finish	Scheduled Durat	Scheduled Effor	Actual Start	Actual Finish	Percent Complete
0	testForTAW		In Planning	5/1/16	9/30/16	107	198	8/26/16		8.16%
1	+ create_release		In Planning	5/1/16	7/29/16	63	0			0%
9	prepare for the online		Ready	8/1/16	8/24/16	18	144			0%
10	- test phase 1		In Planning	7/1/16	9/30/16	64	54	8/26/16		18.18%
11	Sprint 1		Ready	7/1/16	7/13/16	8	0			0%
12	Sprint 2		Ready	7/15/16	7/27/16	9	0			0%
13	Sprint 3		Ready	7/29/16	8/10/16	9	0			0%
14	- Sprint 4		In Planning	8/24/16	8/24/16	1	12			0%
15	test UI		Ready	8/24/16	8/24/16	1	12			0%
16	- Sprint 5		In Planning	8/26/16	9/7/16	8	42	8/26/16		50%
17	test back service		In Progress	8/26/16	9/7/16	8	12	8/26/16		50%
18	test webserve 2		Complete	8/26/16	9/7/16	8	18	8/26/16	9/8/16	100%
19	test webservice1		Ready	8/26/16	9/7/16	8	12			0%
20	Sprint 6		Ready	9/9/16	9/21/16	9	0			0%
21	Sprint 7		Ready	9/23/16	9/30/16	6	0			0%

Viewing Agile Release Actual Data in Work Plan

Enable Estimated Remaining Effort for external task

Calculate Rules

1. If invested hours equals 0
ERE will be Estimated Hours
that resource fill in AGM.

2. If invested hour not equals 0
, complete percent(PC) will be
 $100 * (\text{Invested Hours}) /$
 $(\text{Invested Hours} + \text{remaining}$
 $\text{Hours}),$

ERE=
 $\text{Invested Hours} * (100/PC-1)$

Seq	Name	Status	Actual...	Per...	Estimated Remaining Effort (hrs)	Actual ...	Ac...	Actual...	Estimated Finish Date	Re...	Prede...	Actuals As Of
0	tset	In Planni...	42.00	1	20.00	8/2/16		0.00	3/30/18	Ad...		8/18/16
1	t11	Ready	0.00	0	8.00			0.00	8/15/16			
2	t11	In Planni...	0.00	0	0.00			0.00	8/12/16			
4	t2	In Planni...	42.00	1	6.00	8/2/16		0.00	8/7/16			8/18/16
314	task4	In Planni...	0.00	0	0.00			0.00	11/28/14			
363	task3	In Planni...	0.00	0	0.00			0.00	2/9/18			
365	task2	In Planni...	0.00	0	0.00			0.00	11/28/14			
415	task	In Planni...	0.00	0	6.00			0.00	12/30/16			
416	Sprint 1	In Planni...	0.00	0	6.00			0.00	9/2/16			
417	0809_1	Ready	0.00	0	0.00			0.00	9/2/16			
418	0809_11	Ready	0.00	0	0.00			0.00	9/2/16			
419	0810-1	Ready	0.00	0	0.00			0.00	9/2/16			
420	0810_11	Ready	0.00	0	6.00			0.00	9/2/16	tes...		
421	test11	Ready	0.00	0	0.00			0.00	9/2/16			
422	test12	Ready	0.00	0	0.00			0.00	9/2/16			
423	Sprint 2	In Planni...	0.00	0	0.00			0.00	9/30/16			
424	0809_2	Ready	0.00	0	0.00			0.00	9/30/16			
425	0809_22	Ready	0.00	0	0.00			0.00	9/30/16			
426	0809_222	Ready	0.00	0	0.00			0.00	9/30/16			
427	0810_2	Ready	0.00	0	0.00			0.00	9/30/16			

Importing Agile Effort from HPE Agile Manager to PPM Center Time Sheets

Synchronize daily effort on release

Precondition: The timesheet policy must be day in hours.

Instead of listing out one team member's total effort in certain release during this timesheet period, new connector is able to get one team member's daily effort in the release.

The screenshot shows the 'Import External Data' dialog box in the HPE Project and Portfolio Management Center. The dialog has three steps: 1. Select Instance, 2. User Configuration, and 3. Confirmation. Under 'Available external items', there is a table with columns for Actions, Name, Effort (Hours), and dates from 8/16/16 to 8/25/16. Two items are listed: 'TAW_Demo(t1_sa>Main)' with 33 hours and 'test phase (t1_sa>Main)' with 24 hours. The dialog also includes 'Back' and 'Submit' buttons.

The screenshot shows a time sheet for Barbara Lewis for the period 9/1/16 to 9/15/16. It includes a 'Time Sheet Policies' button and a 'Time Sheet Details' section with a 'Time Breakdown' tab. The details are presented in a table with columns for days of the week and a 'Total' column. The table shows effort for 'External Data' activities, specifically 'AMS Presales HP Media Store 2.0' and 'AMS Presales HP Media Store 2.5', with a total effort of 79.00 hours.

Item	Activity	Expected Hours	Thu 9/1	Fri 9/2	Sat 9/3	Sun 9/4	Mon 9/5	Tue 9/6	Wed 9/7	Thu 9/8	Fri 9/9	Sat 9/10	Sun 9/11	Mon 9/12	Tue 9/13	Wed 9/14	Thu 9/15	Total
<input type="checkbox"/>	External Data																	
<input type="checkbox"/>	AMS Presales HP Media Store 2.0(t47083...	0.0	0.00	6.50	0.00	0.00	3.00	8.00	4.00	5.00	5.00	0.00	0.00	8.00	2.00	1.00	1.00	43.50
<input type="checkbox"/>	AMS Presales HP Media Store 2.5(t47083...	0.0	0.00	1.50	0.00	0.00	5.00	0.00	3.00	3.00	3.00	0.00	0.00	0.00	6.00	7.00	7.00	35.50
Line Actions:			0.00	8.00	0.00	0.00	8.00	8.00	7.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	79.00

User Management Console



User Management Console capabilities

- Create user
- View and edit user
- Copy user
- Filter user
- Enable / disable user

Eliminates the need for RMI protocol for supported user administration functions supported by User Management Console

User Management Console

Username	First Name	Last Name	Enabled	Email Address	Phone Number	Company	Logon ID
admin	Admin	User	Y				admin
author_unk...	<Author	Not Known>	N				author_un...
i18n_user	i18n	user	N				i18n_user
ppm_migrator	PPM	migrator	N				ppm_migr...
ppm_service	PPM	Service	N				ppm_service
seed_data	seed	data	N				seed_data
upgrade_data	upgrade	data	N				upgrade_d...
workflow_ti...	workflow	timeout service	N				workflow_t...

View User: admin

Basic Information

Username: **admin** Company:

First Name: **Admin** Last Name: **User**

Email: Phone Number:

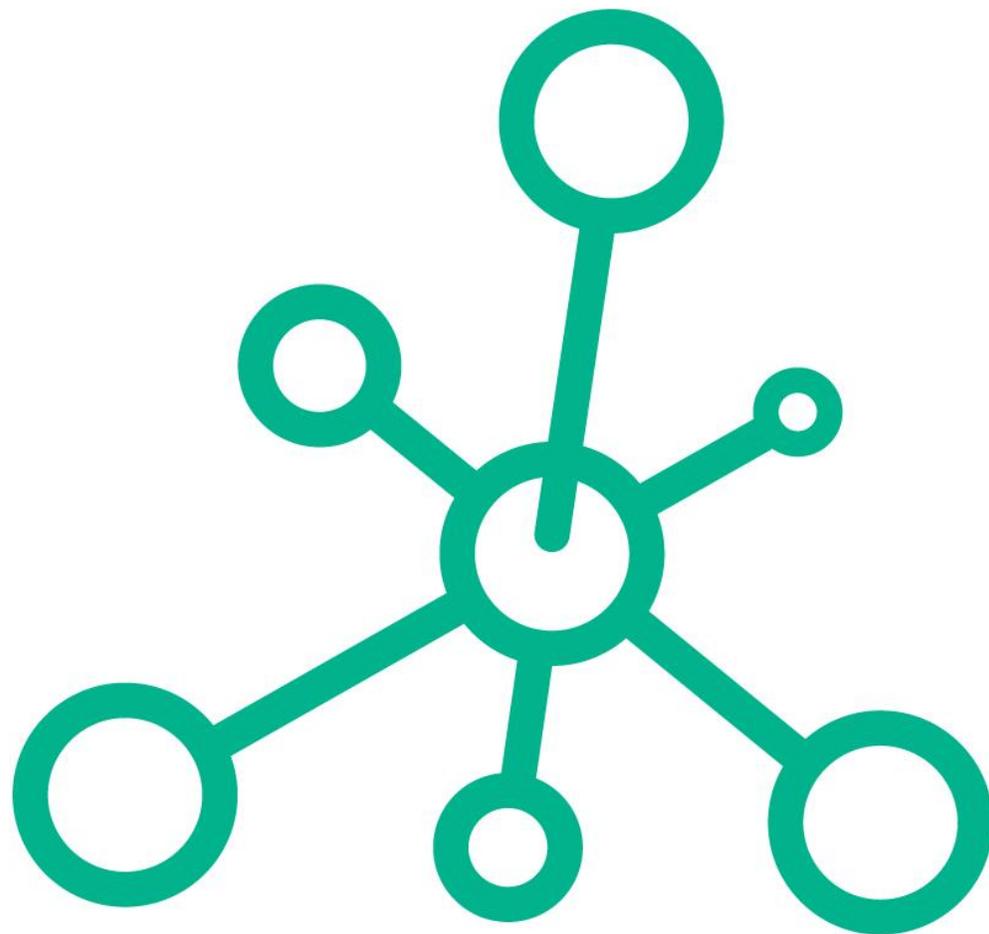
Authentication

Authentication Mode: **PPM** Password: *********

Start Date: **Jan 1, 1999** New password on login: **No**

End Date: Password Exp. Days:

Thank you



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