

CA PA for CA PPM 15.5: Demand Management 200

SUPPORTED PRODUCT RELEASE(S)

CA Productivity Accelerator for CA PPM 15.5

CONTENT DURATION & CODE

- One (1) Hour
- 33CLR26354

PREREQUISITES

- CA PA for CA PPM 15.5: Core Components 200, Two (2) Hours, 33CLR26304
- CA PA for CA PPM 15.5: Time Management 200, One (1) Hour, 33CLR26314

INTENDED AUDIENCE

- Business Analyst
- Business End User
- Business Team Member
- IT Manager
- Project Manager
- Key Resource
- Stakeholder
- Process Manager
- Project Management Office
- Project Sponsor

Overview

In today's marketplace, it is vitally important for your organization to be able to view all demand points, including project work and incident-driven requests, to make it possible to strike a dynamic balance among them. CA Project and Portfolio Management (CA PPM) provides a single view through which all demand can be evaluated and managed while offering total visibility of resource usage. With the addition of the program management office (PMO) add-in, CA PPM is a valuable tool for managing and gaining insight into project, program, and portfolio performance that is not tied to any specific industry.

This content will show you how to create and manage ideas and incidents from inception to project creation. You will be shown how to create schedules and budgets and assign resources for ideas, ultimately leading to converting an idea to a project. Finally, this content will show you how to create incidents, identify and track effort, and convert an incident to a project or task. This content is based on the classic CA PPM interface.

What is Covered

- Correctly create and manage ideas and incidents so that they can be approved in a timely manner.
- Effectively perform the approval and rejection process for an idea to help eliminate poor or financially improper ideas before they become investment objects and exhaust vital resources.
- Correctly convert an idea to a project after it has been approved.
- Convert an incident to a project or task when the scope of an incident reaches a point where it needs to be better handled.

Lessons Included

Module 1: Ideas – Creating Ideas

- Create an idea
- Update the Idea Summary page
- Update the Description subpage
- Update the Alignment & Risk subpage
- Update the Financial Summary subpage
- Update the Settings subpage
- Update the Financial subpage
- Update the Dependencies subtab

Module 2: Ideas – Managing Ideas

- Add a team to an idea
- Examine resource access rights to an idea
- Link an idea to a parent investment
- Mark an idea for deletion

Module 3: Ideas – Managing Cost Plans

- Create a manual cost plan
- Add grouping rows to a cost plan
- Edit the details of a cost plan
- Create a copy of a cost plan
- Identify the plan of record cost plan
- Create a cost plan from the investment team
- Repopulate a cost plan from the investment team

Module 4: Ideas – Managing Benefit Plans

- Create a benefit plan
- Add benefits to a benefit plan
- Edit benefits in a benefit plan
- Link a benefit plan to a cost plan

Module 5: Ideas – Approving Budgets

- Submit a cost plan for approval
- Examine the submitted budget
- Approve the submitted budget
- Merge budgets
- Replace budgets

Module 6: Ideas – Submitting Ideas for review

- Submit an idea
- Request more information
- Reject an idea
- Approve an idea
- Manually convert an idea to an investment

Lessons Included Continued

Module 7: Incidents – Creating Incidents

- Create an incident
- Update incident information
- Capture time against an incident
- Create an incident note
- Start an incident process
- View the audit trail

Module 8: Incidents – Managing Incidents

- Reassign an incident
- Close an incident

Module 9: Incidents – Converting Incidents to tasks or projects

- Flag an incident for conversion
- Convert an incident to a project
- Convert an incident to a task

Resources

Communities

<https://communities.ca.com/community/ca-ppm>

Learning Path

<http://www.ca.com/us/education-training/learning-paths.html>

Documentation

<https://docops.ca.com/ppmop> - for On Premise customers

<https://docops.ca.com/ppmod> - for SaaS / On Demand customers

Product Information

<https://www.ca.com/us/products/ca-project-portfolio-management.html?intcmp=headernav>

<https://www.ca.com/us/education-training/ca-productivity-accelerator.html?intcmp=headernav>