

# CA PA for CA PPM 15.5: Portfolio Management 200

## SUPPORTED PRODUCT RELEASE(S)

CA Productivity Accelerator for CA PPM 15.5

## CONTENT DURATION & CODE

- Two (2) Hours
- 33CLR26344

## PREREQUISITES

- CA PA for CA PPM 15.5: Project and Investment Management 200, Three (3) Hours, 33CLR26324

## INTENDED AUDIENCE

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

## Overview

Without being able to align investments with corporate goals, an organization may not be able to deliver the highest return from its valuable resources. Organizational initiatives require a portfolio of project-related investment objects to make them a reality.

The Portfolio Management module of CA Project & Portfolio Management (CA PPM) enables you to establish the viability of an initiative before you schedule investment objects. It also enables you to analyze current initiative portfolios and make informed decisions about the efficient application of investment objects and the maintenance of project-related cost and revenue goals.

This content will show you how to create, maintain, and analyze the true cost and benefit of organizational initiatives using the performance analysis and waterlines features of CA PPM. This content is based on the classic CA PPM interface.

## What is Covered

- Create and maintain portfolios, which enable you to create a detailed inventory of all your investments.
- Define the portfolio targets, to help ensure your objectives are being correctly analyzed.
- Add investments and roles to define the content of a portfolio, which enables you to monitor and analyze grouped investments.
- Synchronize the portfolio with the live investments, to help ensure the latest investment data is available for analysis.
- Analyze a portfolio, which helps you make decisions about adding to or removing investments from the portfolio and ensuring that resources are optimally allocated to the best investment combinations.
- Create and maintain plans, which help you test “what-if?” situations to determine the allocation of your resources across investments, decide on the correct set of investments for your portfolio, and adjust your portfolio budget.

## Lessons Included

### Module 1: Portfolio management: Creating portfolios

- Review investment details
- Create a portfolio
- Examine the Targets page - cost and benefit data
- Examine the Targets page - portfolio role data
- Examine resource access rights to a portfolio
- Examine the Portfolios page

### Module 2: Portfolio management: Adding content

- Select the portfolio investments
- Synchronize the portfolio data
- Examine the Investments page

### Module 3: Portfolio analysis: Reviewing the Waterlines page

- Examine the Waterlines portlet
- Configure the Waterlines portlet
- Create a portfolio-specific Waterlines view
- Define investment ranking rules
- Manually rank investments
- Examine the aggregation data

### Module 4: Portfolio analysis: Creating plans

- Create a plan
- Update investment details in a plan
- Manage portfolio plans
- Set a portfolio plan as the plan of record
- Communicate the portfolio plans using reports

### Module 5: Portfolio extended analysis: Reviewing the PMO portfolio portlets

- Display the PMO-Portfolio Investment Dashboard layout
- Examine the Scorecard page
- Examine the Analysis page
- Examine the Capacity page
- Examine the Financials page

### Module 6: Portfolio group analysis: Reviewing the Portfolio Dashboard portlets

- Navigate to the Portfolio Dashboard
- Examine the Cost and Benefits page
- Examine the Roles page
- Examine the Cost and Health page
- Examine the Goal Analysis page
- Examine the Investment Analysis page
- Examine the Capital and Operating page

## 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>