CA PRODUCTIVITY ACCELERATOR CONTENT DESCRIPTION

CA PA for CA PPM 15.4: Premium Content 200 Bundle

PRODUCT RELEASE

CA PPM 15.4

DURATION & COURSE CODE

- Fourteen (14) Hours
- 33CLR2600B

INTENDED AUDIENCE

- Project Manager
- Resource Manager
- Demand Manager
- Executive
- Team Member
- Idea Requestor
- Administrator
- Finance Manager

Content Overview

Ensuring your implementation team has the knowledge to deploy and maintain your CA Project and Portfolio Management (PPM) application is important. You need a streamlined education solution that provides your team with the knowledge they need to be successful. Our experience in implementing our suite of CA PPM applications has provided us with an understanding of typical team roles and the knowledge needed for a successful implementation.

We have consolidated the CA Productivity Accelerator core content along with Financial Management into one product. The details below provide a general overview of the focus of the training. The idea is to simplify the training to help you get the most from your CA PPM investment. This content is based on the classic CA PPM interface.

What Is Covered

- Navigate CA PPM
- Use the collaboration features of CA PPM
- Create, approve and manage timesheets
- Manage projects and other investments
- Manage resources and roles
- Create and manage ideas and incidents
- Create and analyze portfolios
- Create an OBS and enable the financial properties for projects, investments, resources, and companies
- Manage the financial cost matrix; post and correct postings of financial transactions
- Define Cost Plans and Benefit Plans

Content Included

1 – Core Components	2 – Time Management
▪ Performing basic navigation ▪ Creating a project for collaboration ▪ Managing project participants ▪ Working with action items ▪ Working with documents ▪ Working with discussions ▪ Starting a process ▪ Updating a process ▪ Creating ideas ▪ Approving and converting ideas ▪ Working with the organizer ▪ Running reports ▪ Configuring list page content ▪ Configuring list page format and filters ▪ Configuring the overview pages ▪ Configuring personal portlets and dashboards ▪ Configuring the Home page and account settings ▪ Configuring your Favorites menu	▪ Accessing your timesheets ▪ Adding time-entry rows ▪ Entering time ▪ Adding notes ▪ Submitting your timesheet ▪ Managing manual approvals ▪ Managing process-enabled approvals ▪ Correcting timesheet errors ▪ Configuring timesheets

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Content Included

3 – Project and Investment Management	4 – Resource Management
▪ Creating a project ▪ Building projects using templates ▪ Accessing projects ▪ Creating charge codes ▪ Defining the WBS ▪ Creating dependencies ▪ Scheduling a project ▪ Adding staff to a project ▪ Assigning resources to tasks ▪ Replacing assignments ▪ Managing resource allocations ▪ Working with mixed allocations ▪ Managing collaboration data ▪ Risks, issues, and change requests ▪ Managing cost plans ▪ Managing benefit plans ▪ Approving budgets ▪ Baselining the project ▪ Analyzing posted actuals ▪ Closing a project ▪ Examining portlets ▪ Managing multiple projects ▪ Non-project investments	▪ Accessing resource information ▪ Creating a resource ▪ Managing additional resource information ▪ Searching for resources ▪ Adding staff members to a project ▪ Managing allocations and estimates ▪ Managing the booking status ▪ Replacing staff members using the Resource Finder ▪ Examining the Resource Planning portlets ▪ Creating requisitions in a project ▪ Managing requisitions ▪ Capacity Planning portlets and scenarios

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Content Included

5 – Demand Management

- Creating ideas
- Managing ideas
- Managing cost plans
- Managing benefit plans
- Approving budgets
- Submitting ideas for review
- Creating incidents
- Managing incidents
- Converting incidents to tasks or projects

6 – Portfolio Management

- Creating portfolios
- Adding content
- Reviewing the Waterlines page
- Creating plans
- Reviewing the PMO Portfolio portlets
- Reviewing the Portfolio Dashboard portlets

7 – Financial Management

- Setting up financial organizational structure attributes
- Setting up financial classifications, currency, and vendors
- Setting up cost/rate matrices
- Assigning financial properties
- Running the Post Transactions to Financial job
- Creating transaction entries
- Processing WIP transactions
- Setting up chargeback and investment rules
- Managing cost plans
- Managing benefit plans
- Approving budgets

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