

# CA PA for CA PPM 15.5: Project and Investment Management 200

## SUPPORTED PRODUCT RELEASE(S)

CA Productivity Accelerator for CA PPM 15.5

## CONTENT DURATION & CODE

- Three (3) Hours
- 33CLR26324

## PREREQUISITES

- Practical experience navigating the application and entering actuals on timesheets
- Formal PM experience planning and controlling a project
- CA PA for CA PPM 15.5: Core Components 200, Two (2) Hours, 33CLR26304

## INTENDED AUDIENCE

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

## Overview

CA Project and Portfolio Management (CA PPM) provides your organization with a tool that includes the functionality needed to enhance your capacity to successfully deliver on all project commitments.

This content is for users who will manage projects using CA PPM. Project management procedures from start to finish are demonstrated, including project setup, assembling a project team, managing project risks, issues, and change requests, and closing out a project. Procedures pertinent to controlling the progression of a project are demonstrated. Setting project baselines, identifying dependencies, and the use of Gantt charts are also demonstrated. This content is based on the classic CA PPM interface.

## What is Covered

- Create a project correctly to help ensure your project is developed on a solid foundation.
- Build a work breakdown structure to help efficiently organize tasks and schedules on your project.
- Allocate resources and assign tasks to resources to help build strong teams, which helps ensure the successful planning, deployment, and completion of your projects and investments.
- Create risks, issues, and change requests for a project so that the team is made aware of potential effects on the project scope, schedule, budget, or any combination thereof.
- Create project schedules that identify dependencies so that scheduling functionality in the application is used effectively.
- Close out a project to make sure it is consistent with requirements and it meets all audit requirements.
- Compare projects and the other investment types.

## Lessons Included

### Module 1: Creating a project

- Create a project
- Add a project to the My Projects portlet
- Update a project
- Create a Status Report document
- Examine resource access rights to a project

### Module 2: Building projects using templates

- Create a project from a template
- Update a project by copying from a template

### Module 3: Accessing projects

- Locate projects by applying a project filter
- Open a project in the scheduling software

### Module 4: Creating charge codes

- Create a charge code
- Navigate to administration data linked to charge codes

### Module 5: Defining the WBS

- Create WBS tasks
- Indent WBS items
- Move a WBS item
- Modify a WBS item
- Outdent a WBS item
- Delete a WBS item

### Module 6: Creating dependencies

- Create dependencies on the task Dependencies page
- Create dependencies using the Gantt
- Create a dependency chain

### Module 7: Scheduling a project

- Create and publish a schedule
- Add date constraints to tasks
- Change the Gantt display
- Print the Gantt
- Set Autoschedule project job parameters

### Module 8: Adding staff to a project

- Add resources to a team
- Manage allocations for a staff member
- Examine allocation details for staff members
- Add resources to a project using an OBS unit

## Lessons Included Continued

### Module 9: Assigning resources to tasks

- Define the project assignment pool
- Assign resources on the task Properties page
- Assign resources to tasks on the Gantt
- Update an assignment role
- Modify the ETC values of resources

### Module 10: Replacing assignments

- Replace a role on a task
- Replace a role throughout the project

### Module 11: Managing resource allocations

- Allocate from estimates
- Examine the allocation segments of a resource
- Shift the allocation of a resource

### Module 12: Working with mixed allocations

- Update the booking status of a resource
- Create a mixed booking
- Resolve them mixed booking

### Module 13: Managing collaboration data

- Update the status of a project action item
- Examine the project discussions
- Examine the project documents

### Module 14: Management

- Create a risk
- Create a response strategy for a risk
- Add a note to a risk
- Associate a task to a risk
- Examine the risk audit and processes tabs
- Create an issue
- Create a change request

### Module 15: Managing cost plans

- Create a cost plan
- Add grouping rows to the cost plan
- Edit the details of the cost plan
- Create a copy of the cost plan
- Identify the plan of record cost plan
- Create a cost plan from the resource plan
- Repopulate a cost plan from the resource plan
- Define Operating and Capital costs

### Module 16: Managing benefit plans

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

## Lessons Included Continued

### Module 17: Approving budgets

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

### Module 18: Baselining the project

- Create a baseline
- Update the baseline on a task
- Set the current revision baseline

### Module 19: Analyzing posted actuals

- Analyze posted actuals
- Update the ETC of a task

### Module 20: Closing a project

- Close time entry on a project
- Deactivate a project

### Module 21: Examining portlets

- Examine the Sponsor tab
- Examine the Program Dashboard tab
- Examine the PM Alerts tab
- Examine the Project Dashboard tab
- Examine the Risks, Issues and Changes tab
- Examine the project dashboards

### Module 22: Managing multiple projects

- Create project-level dependencies
- Create a program
- Define the content of the program
- View data contained in the program
- Examine the program dashboards
- Create a master project
- Examine the details of the master project

### Module 23: A project comparison

- Services: create a service
- Services: examine service subpages
- Services: add staff to your investment
- Services: update staff member properties
- Examine applications
- Examine assets
- Examine products
- Examine other work
- Examine ideas
- Examine financial plans for non-project investments

## 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>