

CA PA for CA PPM 15.5: Resource Management 200

SUPPORTED PRODUCT RELEASE(S)

CA Productivity Accelerator for CA PPM 15.5

CONTENT DURATION & CODE

- Two (2) Hours
- 33CLR26334

PREREQUISITES

- CA PA for CA PPM 15.5: Core Components 200, Two (2) Hours, 33CLR26304
- 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
- Project Manager
- Key Resource or Stakeholder
- Process Manager
- Project Management Office
- Project Sponsor

Overview

Achieving an equitable balance between resource capacity and project demand is a significant issue in today's business environment as companies try to achieve the highest return on investment from their project portfolios. CA Project and Portfolio Management (CA PPM) Resource Management helps plan and manage resource capacity and balance it against work demand, a required approach for any project and resource management strategy.

This content is for the user who is responsible for capacity planning in CA PPM. It will show how to create and manage resource and role profiles and capture and define data elements. After the resources are established, the staffing methods (formal and informal), the Resource Finder function, and the resource requisition tools will be demonstrated. In addition, there will be a review of the Allocations screens and Capacity Planning functionality. This content is based on the classic CA PPM interface.

What is Covered

- Add and manage resources and roles to help you correctly define their skills, which enable resources to be effectively managed.
- Locate resources using the Resource Finder to quickly and efficiently find resources with the necessary availability and applicable skills.
- Allocate resources to projects effectively and efficiently.
- Manage resource allocation by reviewing the resource allocation portlets to help prevent over-allocation.
- Analyze resource needs using Capacity Planning to help you identify where the demand exceeds the available resources so that you can anticipate project delays or the need to hire more resources.

Lessons Included

Module 1: Resources and roles: Accessing information

- Navigate the Resource Management pages
- Filter the Resource List page
- Edit data on the Resource List page
- Configure the content on the Resource List page

Module 2: Resources and roles: Creating a resource

- Create a role
- Create a resource
- Update resource information
- Grant resource access rights to a user

Module 3: Resources and roles: Managing additional resource information

- Add skills
- Add allocations
- Upload a document
- Manage the calendar
- Examine the audit trail

Module 4: Resource Finder: Searching for resources

- Define a Resource Finder filter
- Book a resource to an investment

Module 5: Staff management: Adding staff members to a project

- Add a resource to a project
- Edit the role of a staff member
- Update the properties of a staff member
- Remove a staff member
- Add resources to a project using an OBS unit

Module 6: Staff management: Managing allocations and estimates

- View allocations and estimates
- Manage allocations using dates
- Manage allocations using the allocate from estimates tool
- Manage over-allocation

Module 7: Staff management: Managing the booking status

- Update the booking status
- Create a mixed booking
- Resolve a mixed booking

Module 8: Staff management: Replacing staff members using the Resource Finder

- Replace a role with a resource
- Replace a resource with a resource

Lessons Included Continued

Module 9: Resource management: Examining the Resource Planning portlets

- Examine the Workloads tab
- Examine the Allocations tab
- Examine the Unfilled Allocations tab
- Examine the Bookings tab
- Examine the Top Down Planning tab

Module 10: Resource requisitions: Creating requisitions in a project

- Prepare data for a requisition
- Create multiple resource requisitions
- Examine the project Requisitions page

Module 11: Resource requisitions: Managing requisitions

- View requisitions as the resource manager
- Filter resource requisitions
- Propose a resource for a requisition
- Override the Resource Finder for a requisition
- Book a resource as a resource manager
- Review a requisition as a project manager
- Examine requisition history
- Create a requisition to replace a resource
- Unbook a resource
- Transfer ETC from a role to a resource

Module 12: Capacity planning: Portlets and scenarios

- Examine the Role Capacity portlets
- Create a scenario
- Create "what-if?" changes in the scenario
- Add investments to the scenario
- Edit scenario investment details
- Compare two scenarios
- Activate a scenario from a project page
- Manage scenarios

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>