

# CA PPM 15.3: Portfolio Management 200



## Course 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 CA Project & Portfolio Manager 15.3 (CA PPM) Portfolio Management module 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 course will show you how to create, maintain, and analyze the true cost and benefit of organizational initiatives using the performance analysis and scorecard features of CA PPM. This training is based on CA PPM classic interface.

This class consists of 13 hours of SELF-DIRECTED learning including lab activities.

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### PRODUCT RELEASE

CA PPM 15.3

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### COURSE TYPE, LENGTH & CODE

- Dynamic Labs
- Thirteen (13) Hours
- Course Code: 33CLR2530S

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### PREREQUISITES

Knowledge of project and investment management in CA PPM, equivalent to the following course:

- CA PPM 15.3: Project and Investment Management 200  
Nineteen and a Half (19.5) Hours  
Course Code: 33CLR2527S

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### WHO SHOULD ATTEND

- Business Analysts
- Business End Users
- Business Team Members

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## What You Will Learn

- Create and maintain portfolios, which enables you to create a detailed inventory of all your investments.
- Add investments to define the content of a portfolio, which enables you to monitor and analyze grouped investments.
- 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 scenarios, which helps you plan the allocation of your resources across investments, decide on the correct set of investments for your portfolio, and adjust your portfolio budget.

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## For Managers

CA PPM can help your team deliver projects efficiently by providing you with enterprise program and project planning, estimating, budgeting, resource allocation, collaboration, and time capture; all the tools your team needs for

- IT Services Managers
- Key Resources
- Key Stakeholders
- Process Managers
- Project Management Office
- Project Managers
- Project Sponsors

project execution.

This content will provide effective training for you and your team to help ensure a quicker return on investment (ROI) for the products purchased by your organization. This course is designed for those IT professionals who will manage projects and non-project investments in CA PPM. This content offers investment managers the training needed to shorten deployment time, reduce risk, and lower costs.

CA PPM classes can be credited toward Project Management Professional Development Units (PDUs) from the Project Management Institute® (PMI®).

**RECOMMENDED  
NEXT COURSES**

- CA PPM 15.3: User Management 200
- Six and a Half (6.5) Hours  
Course Code: 33CLR2552S

**Course Agenda**

| Module 1 - Build Portfolios  | Module 2 - Analyze Portfolios  |
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| <ul style="list-style-type: none"> <li>▪ Describe Portfolio Management</li> <li>▪ Create portfolios</li> <li>▪ Add investments to a portfolio</li> <li>▪ Create portfolio targets</li> </ul> | <ul style="list-style-type: none"> <li>▪ Review the Waterlines page</li> <li>▪ Review the PMO-Portfolio Investment Dashboard portlets</li> <li>▪ Review the Portfolio Dashboard pages</li> </ul> |
| Module 3 - Manage Portfolio Plans  |  |
| <ul style="list-style-type: none"> <li>▪ Create portfolio plans</li> <li>▪ Implement plans</li> </ul>  |  |



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