

OnDemand CA PPM 15.3: New User Experience - Resource Management 200



Course Overview

Project confidence is mission critical in today's application economy. The New User Experience (New UX) for CA Project and Portfolio Manager 15.3 (CA PPM 15.3) provides you with a convenient, simple, and easy way to plan and manage resource capacity and balance it against work demand, a required approach for any project and resource management strategy.

This course is for users who plan and manage resource allocations and requests in the New User Experience interface of CA PPM.

PRODUCT RELEASE

CA PPM 15.3 New User Experience

COURSE TYPE, LENGTH & CODE

- Web Based Training (WBT)
- One (1) hour
- Course Code: 33CLR25530

PREREQUISITES

- Knowledge of accessing web-based information

What You Will Learn

- Manage resource data, as a resource manager
- Review and update allocations for resources
- Configure the view settings to enable periodic allocation analysis
- Set up allocation requests, as an investment manager
- Collaborate using conversations, to discuss the requests
- Replace roles with named resources to fulfill requests

For Managers

The New UX engages your team and becomes an intuitive and natural extension for how they work. Management does not want any surprises and needs the data to tell an accurate story so that it can be trusted to make sound business decisions.

This content demonstrates how to use the New UX from the perspective of:

- Resource managers, who need to manage the allocations for their team
- Investment managers, who need to allocate roles and resources to their investments to plan for future requirements
- Collaboration between the resource and investment managers to ensure requests are filled in a timely manner

WHO SHOULD ATTEND

- Project Manager
- Program Office Manager
- IT Services Manager
- Business Analyst
- Application Administrator
- Financial Administrator
- Data Administrator
- System Administrator

Course Agenda

1 – Explore the Resource Management Views	2 – Define View Settings
<ul style="list-style-type: none"> ▪ Resource management views overview ▪ Data overview 	<ul style="list-style-type: none"> ▪ Update view settings and the Telescope window ▪ Set filters in the views
3 – Modify Allocation Values	4 – Modify Allocation Values
<ul style="list-style-type: none"> ▪ Use views to manipulate allocations ▪ Manage allocations in the Resources to Investments view ▪ Manage allocations in the Investments to Resources view ▪ Set up the forecast rate 	<ul style="list-style-type: none"> ▪ Examine the requests view ▪ Add details to a request ▪ Fill a request



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