

# CA PPM 15.4: Resource Management 200




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## PRODUCT RELEASE

CA PPM 15.4

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## COURSE TYPE, LENGTH & CODE

- Dynamic Labs
- Six and a Half (6.5) Hours
- Course Code: 33CLR2595S

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## PREREQUISITES

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

- CA PPM 15.4: Project and Investment Management 200  
Nineteen and a Half (19.5) Hours  
Course Code: 33CLR2594S

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## WHO SHOULD ATTEND

- Business Analysts
- Business End Users

## Course 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 & Portfolio Manager 15.4 (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 course 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 training is based on CA PPM classic interface.

This class consists of 6.5 hours of SELF-DIRECTED learning including lab activities.

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## What You Will Learn

- 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.

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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

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

allocation, collaboration, and time capture: all the tools your team needs for project execution.

This content is designed for IT professionals who will be managing the resources in your organization. Students are taught how to allocate resources using informal and formal request processes. They will also be shown how to analyze and update allocations by project, role, and team to help ensure staffing levels meet organizational demands.

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

**RECOMMENDED NEXT COURSES**

- CA PPM 15.4: Financial Management 200  
Nineteen and a Half (19.5) Hours  
Course Code: 33CLR2598S
- CA PPM 15.4: Portfolio Management 200  
Thirteen (13) Hours  
Course Code: 33CLR2597S
- CA PPM 15.3: User Management 200  
Six and a Half (6.5) Hours  
Course Code: 33CLR2552S

**Course Agenda**

<b>Module 1 – Create Roles and Resources</b>	<b>Module 2 – Book Project Team Members Using Resource Finder</b>
<ul style="list-style-type: none"> <li>▪ Create roles and resources</li> <li>▪ Update additional resource information</li> </ul>	<ul style="list-style-type: none"> <li>▪ Book resources to projects using Resource Finder</li> <li>▪ Compare Resource Finder functionality between project team and Resource Finder pages</li> </ul>
<b>Module 3 – Manage Resource Requisitions</b>	<b>Module 4 – Analyze Resource Data</b>
<ul style="list-style-type: none"> <li>▪ Create requisitions in a project</li> <li>▪ Propose resources</li> <li>▪ Accept or reject proposed resources</li> </ul>	<ul style="list-style-type: none"> <li>▪ Analyze resource data using the resource planning portlets</li> </ul>
<b>Module 5 – Perform Resource Capacity Planning</b>	
<ul style="list-style-type: none"> <li>▪ Examine the Capacity Planning portlets</li> <li>▪ Create Capacity Planning scenarios</li> </ul>	



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