

CA PPM 15.4: New User Experience Financial Management 200



PRODUCT RELEASE

CA PPM 15.4

COURSE TYPE, LENGTH & CODE

- Web Based Training (WBT)
- One half (1/2) hour
- Course Code: 33CLR26200

PREREQUISITES

- Knowledge of setting up resource allocations and assignments for projects

WHO SHOULD ATTEND

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

Course Overview

In today's business world, it is crucial to ensure that all project-related costs for time and materials are properly allocated to the appropriate department or other unit of your organization. The New User Experience (New UX) for CA Project and Portfolio Manager 15.4 (CA PPM 15.4) provides you with a convenient, simple, and easy way to plan and manage cost plans to help ensure effective analysis of the project costs.

What You Will Learn

- Access and navigate the Financials page of a project
- Create and edit cost plans
- Work with the cost plan views

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 a project manager, who creates costs plans both manually and from the team allocations and assignments to the project.

Course Agenda

1 - Access the Financials Page <ul style="list-style-type: none">▪ Set up the project for financial planning▪ Project Financials - summary	2 - Create and Edit Cost Plans <ul style="list-style-type: none">▪ Cost plans - overview▪ Cost plan creation methods▪ Create a cost plan manually▪ Populate cost plans from allocations and assignments▪ Plan of record cost plan▪ Cost plan transactions▪ Cost plan data requirements
3 - Work with Cost Plan Views <ul style="list-style-type: none">▪ Project Financials page – column configuration▪ View settings	4 - Additional Information <ul style="list-style-type: none">▪ Benefit plans and budget plans in Classic UI



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