

CA PPM 14.4: Resource Management 200



PRODUCT RELEASE

CA PPM 14.4

COURSE TYPE, LENGTH & CODE

- Dynamic Labs
- Six and a Half (6.5) Hours
- Course Code: 33CLR2417S

PREREQUISITES

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

- CA PPM 14.4: Project and Investment Management 200
Nineteen and a Half (19.5) Hours
Course Code: 33CLR2416S

WHO SHOULD ATTEND

- Business Analysts
- Business End Users
- Business Team Members

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 14.4 (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 Clarity 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 class consists of 6.5 hours of SELF-DIRECTED learning including lab activities.

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.

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 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 14.4: Financial Management 200
Nineteen and a Half (19.5) Hours
Course Code: 33CLR2418S
- CA PPM 14.4: Portfolio Management 200
Thirteen (13) Hours
Course Code: 33CLR2419S
- CA PPM 14.3: User Management 200
Six and a Half (6.5) Hours
Course Code: 33CLR2396S

Course Agenda

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



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