

# OnDemand CA PPM 15.1: Demand Management 200



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## PRODUCT RELEASE

CA PPM 15.1

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## COURSE TYPE, LENGTH & CODE

- Web Based Training (WBT)
- One (1) hour
- Course Code: 33CLR24660

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## PREREQUISITES

- CA PPM 15.1: Project and Investment Management 200 Course Code: 33CLR2467S Nineteen and Half (19.5) Hours Dynamic Labs

## Course Overview

In today's marketplace, it is vitally important for your organization to be able to view all demand points, including project work and incident-driven requests, to make it possible to strike a dynamic balance among them. CA Project and Portfolio Management (CA PPM) provides a single view through which all demand can be evaluated and managed while offering total visibility of resource usage. With the addition of the program management office (PMO) add-in, CA PPM is a valuable tool for managing and gaining insight into project, program, and portfolio performance that is not tied to any specific industry.

This content will show you how to create and manage ideas and incidents from inception to project creation. You will be shown how to create schedules and budgets and assign resources for ideas, ultimately leading to converting an idea to a project. Finally, this content will show you how to create incidents, identify and track effort, and convert an incident to a project or task. This training based on CA PPM classic interface.

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## What You Will Learn

- Correctly create and manage ideas and incidents so that they can be approved in a timely manner.
- Effectively perform the approval and rejection process for an idea to help eliminate poor or financially improper ideas before they become investment objects and exhaust vital resources.
- Correctly convert an idea to a project after it has been approved.
- Convert an incident to a project or task when the scope of an incident reaches a point where it needs to be better handled.

**WHO SHOULD ATTEND**

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

**For Managers**

IT executives need to be able to view all demand points, including project work and incident-driven requests, to make it possible to determine a balance among them. They also need to be able to link resources and financials to provide complete insight into how staff time is spent on project and service-oriented work, resulting in accurately forecasted resource requirements and better cost of ownership tracking of existing systems.

CA PPM provides the connection between the service and project functions of your organization. It can provide a single view through which all demand can be evaluated and managed while offering total visibility of resource usage. Because project or planned work is only a portion of overall effort, organizations know that IT governance, portfolio planning, and financial management is ineffective without a view into the service work that creates demand and uses precious resources.

**Course Agenda**

Lesson 1 – Ideas: Creating ideas	Lesson 2 – Ideas: Managing ideas
<ul style="list-style-type: none"> <li>▪ Create an idea</li> <li>▪ Update the Idea Summary page</li> <li>▪ Update the Description subpage</li> <li>▪ Update the Alignment &amp; Risk subpage</li> <li>▪ Update the Financial Summary subpage</li> <li>▪ Update the Settings subpage</li> <li>▪ Update the Dependencies subtab</li> </ul>	<ul style="list-style-type: none"> <li>▪ Add a team to an idea</li> <li>▪ Examine resource access rights to an idea</li> <li>▪ Link an idea to a parent investment</li> <li>▪ Mark an idea for deletion</li> </ul>



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## Course Agenda Continued

<b>Lesson 3 – Ideas: Managing Cost Plans</b>	<b>Lesson 4 – Ideas: Managing Benefit Plans</b>
<ul style="list-style-type: none"> <li>▪ Create a manual cost plan</li> <li>▪ Add grouping rows to a cost plan</li> <li>▪ Edit the details of a cost plan</li> <li>▪ Create a copy of a cost plan</li> <li>▪ Identify the plan of record cost plan</li> <li>▪ Create a cost plan from the investment team</li> <li>▪ Repopulate a cost plan from the investment team</li> </ul>	<ul style="list-style-type: none"> <li>▪ Create a benefit plan</li> <li>▪ Add benefits to a benefit plan</li> <li>▪ Edit benefits in a benefit plan</li> <li>▪ Link a benefit plan to a cost plan</li> </ul>
<b>Lesson 5 – Ideas: Approving Budgets</b>	<b>Lesson 6 – Ideas: Submitting ideas for review</b>
<ul style="list-style-type: none"> <li>▪ Submit a cost plan for approval</li> <li>▪ Examine the submitted budget</li> <li>▪ Approve the submitted budget</li> <li>▪ Merge budgets</li> <li>▪ Replace budgets</li> </ul>	<ul style="list-style-type: none"> <li>▪ Submit an idea</li> <li>▪ Request more information</li> <li>▪ Reject an idea</li> <li>▪ Approve an idea</li> <li>▪ Manually convert an idea to an investment</li> </ul>
<b>Lesson 7 – Incidents: Creating incidents</b>	<b>Lesson 8 – Incidents: Managing incidents</b>
<ul style="list-style-type: none"> <li>▪ Create an incident</li> <li>▪ Update incident information</li> <li>▪ Enter effort against an incident</li> <li>▪ Create an incident note</li> <li>▪ Start an incident process</li> <li>▪ View the audit trail</li> </ul>	<ul style="list-style-type: none"> <li>▪ Reassign an incident</li> <li>▪ Close an incident</li> </ul>
<b>Lesson 9 – Incidents: Converting incidents to tasks or projects</b>	
<ul style="list-style-type: none"> <li>▪ Flag an incident for conversion</li> <li>▪ Convert an incident to a project</li> <li>▪ Convert an incident to a task</li> </ul>	



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