

CA PPM Education Financial Management

PPM EDUCATION COURSE DESCRIPTION



ABSTRACT

These sessions will be an opportunity for your organization to gain a basic understanding of Financial Management within CA PPM.

The agenda is organized into a logical sequence of Modules and Sessions to transfer the information most efficiently. Exercises are used to give the attendees actual experience performing the functions.

OBJECTIVES

This is a 2 day instructor led course that enables CA PPM Core Team users to gain a basic understanding of the Financial functionality of CA PPM.

The objectives of this course are to:

- Understand the basics of how CA PPM financial transactions perform and how the CA PPM application is setup to allow financials.
- Understand how Labor and Non labor concepts are handled in CA PPM.
- Understand the importance of the Financial Organizational Structure and the Rate Matrix operate within CA PPM.
- Understand how CA PPM Cost Plan, Budget Plan and Benefit Plans operate.
- Understand how actual costs are handled in CA PPM.
- Understand the purpose and method of performing Chargebacks with CA PPM

KEY TAKE AWAYS

The key benefits provided to you through this training course are:

- Provide a understanding of the Key Financial Management Concepts of CA PPM
- Provide a general introduction of CA PPM Financial functionality and the benefits of financial Project Management.
- Provide knowledge of how to use CA PPM to financially manage projects.



COURSE CODE

EXCERS201606

PREREQUISITES

The pre-requisites for effective attendance on this course are:

- CA PPM Fundamentals
- Time Management

COURSE PRESENTED BY:



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TOPICS

Introduction to Financial Management

- Industry Standards
- Key Financial Management Concepts
- Financial Management Levels of Complexity
- Clarity Financial Transactions
- Financial Processing – How it all Ties Together
- Financial Management Steps

Resources in Financial Planning

- Labor Resources/Roles – Financial Enablement
- Non-Labor Resources – Financial Enablement

Projects in Financial Planning

- Project Financial Enablement
- WBS to Define Capital and Operating costs
- Project Schedule Conversion to Financial Plan
- Exercises - Hands on practices

Rate Matrix in Financial Planning

- The Rate Matrix Concept
- The Rate Matrix
- Exercises – Hands on practices

Financial Plans

- Introduction
- Financial Summary
- Cost plan
- Budget Plan
- Benefit Plan

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- Exercises – Hands on practices

Non Labor Transactions

- Exercises – Hands on practices

Actual Costs in Financial Planning

- Clarity Actual Costs
- Interfaces
- Financial Posting
- Actual Costs in Financial Plans
- Exercises – Hands on practices