

# CA PPM Education Resource Management

PPM EDUCATION COURSE DESCRIPTION



## ABSTRACT

These sessions will be an opportunity for your organization to gain a deeper understanding of industry standards around Project Resource management and how to use CA PPM to optimize Labor as well as Non Labor Resource Capacity management, staffing of projects and tracking resource utilization.

The agenda is organized into a logical sequence of modules designed to enable participants to be able to effectively manage Resources data and resource allocations in CA PPM. The agenda also enables participants to optimize their resource allocation process through resource requisitions and scenario analysis, and perform Capacity vs Demand Analysis across the organization.

## OBJECTIVES

This course that enables CA PPM end users to understand the context of Resource Management and utilize CA PPM to manage Labor as well as non-Labor Resource Capacity and Demand.

The objectives of this course are to:

- Provide industry context for Resource Management concepts and processes.
- Provide basic knowledge and skills in using CA PPM to on board and Off Board Resources.
- Provide basic knowledge and skills in using CA PPM to Allocate Resource to Projects
- Provide basic knowledge and skills in using CA PPM to perform Resource Capacity vs Demand analysis using Capacity Scenarios.

## KEY TAKE AWAYS

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

- Understand the total Resource Capacity across various Resource Types and Roles the organization.
- Provide early visibility into Resource Demand to ensure investments are staffed appropriately when needed.
- Provide instant real-time view of resource utilization, under/over allocation to resolve conflicts.



**COURSE CODE**

EXCERS201605

**PREREQUISITES**

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

**COURSE PRESENTED BY:**



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## TOPICS

### Introduction and Review of Resource Management Concepts

- What is Resource Management?
- Industry Context and Concepts
- Best Practice Standards and Definitions
- Types of Resources

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### Resource Management Setup

- On-Boarding a Resource
- Updating Resource Profile
- The Resource Calendar
- Resource vs User

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### Resource Roles and Skills

- Resource Roles
- Role Setup and Role hierarchy
- Primary vs Project Role
- Resource Skills
- Skill Setup and Skill hierarchy Create Project Baseline

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### Allocations

- Project Team
- Allocations vs Assignments
- Allocating Named Resource
- Allocating Unnamed Resource
- Allocating from Estimates

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- Hard vs Soft vs Mixed Booking

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## Resource Requisition Process

- Creating Requisitions
- The Requisition process
- Resource Finder
- Viewing Requisitions
- Fulfilling Requisitions

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## Scenario Analysis

- Create Scenario
- Designate Plan of Record
- Generate Versions of the Plan or Scenarios
- Compare the Plans or Scenarios

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## Resource Planning Portlets

- Capacity vs Demand by Role
- Organizational Demand Analysis
- View Resource allocations and Workloads
- Viewing Unfilled Allocations and Resource Utilization

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## OTB Resource Reports Review