

CA PA for CA PPM 15.5: Core Components 200

SUPPORTED PRODUCT RELEASE(S)

CA Productivity Accelerator for CA PPM 15.5

CONTENT DURATION & CODE

- Two (2) Hours
- 33CLR26304

PREREQUISITES

- Working knowledge of accessing web-based information

INTENDED AUDIENCE

- Business Analyst
- Business End User
- Business Team Member
- IT Manager
- Key Resource or Stakeholder
- Process Manager
- Project Management Office
- Project Sponsor
- Project Manager

Overview

CA Project and Portfolio Management (CA PPM) provides your organization with a complete project management solution. You can create projects, define tasks, allocate tasks, record and approve project time, and track and monitor project costs and revenue. All the functionality your organization needs to efficiently execute project tasks and deliver successful project results is included in this application.

Using this content, students will learn how to simplify project-related work using links, buttons, and tabs on pages to help ensure easy navigation. The content can be personalized or customized as each user prefers. Users can add and organize data on pages according to their individual needs. Users can also assemble and organize data portlets, create a personal dashboard, or place frequently used links in a section of the navigation pane. Filter fields can be augmented so that any user-initiated search returns specific data. Reporting features also enable users to refine report data. Users will learn about predefined project processes that can be run to automatically assign project actions to team members. This content is based on the classic CA PPM interface.

What is Covered

- Navigate in the application to gain familiarity with the user interface and functionality.
- Initiate and update processes to help ensure data is handled in a structured and consistent way.
- Customize the application to help better manage and organize work.
- Run reports to analyze information stored in the application.
- Create portlets and dashboards to easily access the information.

Lessons Included

Module 1: Performing Basic Navigation

- Log in and log out
- Explore the Global Header
- Navigate the interface using links and keyboard shortcuts
- Use Smart Sections

Module 2: Creating a Project for Collaboration

- Create a project for collaboration
- Add a project to the My Projects portlet

Module 3: Managing Project Participants

- Add participants to a project
- Remove participants from a project
- Make a participant a collaboration manager
- Create a participant group
- Edit participant groups

Module 4: Working with Action Items

- Create an action item
- Edit an action item
- View an assignee's action item

Module 5: Working with Documents

- Create a document folder
- Save a document in a folder
- Examine document actions
- Navigate the Knowledge Store
- Search for documents

Module 6: Working with Discussions

- Create a discussion topic
- Post a message to a discussion topic
- Reply to a message
- Manage posted messages

Module 7: Starting a Process

- View a Process Flow Diagram
- Start a process

Module 8: Updating a Process

- Reject a process action item
- Review the progress of an initiated process
- Approve a process action item
- Determine process progress and view notes

Lessons Included Continued

Module 9: Creating Ideas

- Create an idea
- Submit an idea for approval

Module 10: Approving and Converting Ideas

- Approve an idea
- Convert an idea

Module 11: Working with the Organizer

- Examine the Action Items tab
- Examine the Tasks tab
- Examine the Processes tab
- Examine the Notifications tab
- Delete notifications

Module 12: Routine Operations: Running Reports

- Save report parameters
- Run a report
- Schedule a report to run
- Print the Gantt

Module 13: Personalization: Configuring List Page Content

- Add a new column to a list page
- Create a link item on a list Page
- Change the sort order of a list page
- Edit the data in a list page
- Export list page data to Excel

Module 14: Configuring List Page Format and Filters

- Set a secondary value for a list field
- Configure secondary value
- Create aggregation rows
- Add a field to the list page filter section
- Remove a filter field from the List Filter Layout page
- Change the parameters of a filter field
- Save a filter
- Create a power filter
- Restore a view back to default settings

Module 15: Configuring the Overview Pages

- Add a portlet to a page
- Configure a portlet
- Manage tabs

Module 16: Configuring Personal Portlets and Dashboards

- Create a portlet
- Create a dashboard
- Add portlets to a dashboard
- Manage a dashboard

Lessons Included Continued

Module 17: Configuring the Home Page and Account Settings

- Set an avatar
- Change your Home page
- Review personal information
- Review Home page settings
- Set a proxy
- Set notifications
- Access additional software
- Examine default partitions

Module 18: Configuring Your Favorites Menu

- Add entries to the Favorites menu
- Manipulate the entries on the Favorites menu

Resources

Communities

<https://communities.ca.com/community/ca-ppm>

Learning Path

<http://www.ca.com/us/education-training/learning-paths.html>

Documentation

<https://docops.ca.com/ppmop> - for On Premise customers

<https://docops.ca.com/ppmod> - for SaaS / On Demand customers

Product Information

<https://www.ca.com/us/products/ca-project-portfolio-management.html?intcmp=headernav>

<https://www.ca.com/us/education-training/ca-productivity-accelerator.html?intcmp=headernav>