

CA PPM 15.3: Process Management 200



Course Overview

Completing projects on time, on budget, and within scope is critical to the business and requires the very best in project and portfolio management solutions. CA Project and Portfolio Manager 15.3 (CA PPM) helps you drive strategic initiatives across your entire enterprise by managing your dynamic business requirements, complex projects, global resources, and shrinking budgets.

The course is targeted to users who want a hands-on training in process management. Topics include creating a process; adding a variety of actions to process steps; creating splits, joins, and conditions; and finalizing a process. You will also leverage process techniques, perform process maintenance, and monitor the process engine.

PRODUCT RELEASE

CA PPM 15.3

There is no major functional impact to the CA PPM 15.1 version of this course from new features in CA PPM 15.2 or CA PPM 15.3.

*To see details of impact, please refer to the **CA PPM 15.2: Cumulative Differences 200** course, which is bundled with the 15.1 version of the course.*

COURSE TYPE, LENGTH & CODE

- Instructor-Led Training (ILT) / Virtual Learning (VL)
- Three (3) Days
- Course Code: 33CLR2548B

PREREQUISITES

- Good working knowledge of the core components of CA PPM

WHO SHOULD ATTEND

- Project Manager
- IT Manager
- Financial Manager
- Project Management Office (PMO)

What You Will Learn

- Create processes using the Process Management feature to optimize and standardize processes across the entire organization
- Maintain processes to cater for changes in company procedures

For Managers

To maximize the benefits of the application for the business, your staff need to be able to administer the powerful business management functionality available. This course is targeted to users who need more in-depth training in process management. Participants will receive extensive hands-on training and be taught how to optimize process management features across the entire organization.

These classes can be credited toward Project Management Professional Development Units (PDUs) from the Project Management Institute® (PMI®).

**RECOMMENDED
NEXT COURSES**

- CA PPM 15.3: User Management 200
Six and one-half (6.5) Hours
Course Code: 33CLR25521

Course Agenda

<p>Module 1 - Define Process Management</p> <ul style="list-style-type: none"> ▪ Describe process management benefits ▪ Identify OOTB processes ▪ Modify process flow diagram settings 	<p>Module 2 - Create Processes</p> <ul style="list-style-type: none"> ▪ Define process properties ▪ Associate a process with an object and a template ▪ Define Start options
<p>Module 3 - Create the Step Structure</p> <ul style="list-style-type: none"> ▪ Edit Start and Finish steps ▪ Create groups ▪ Create Middle steps ▪ Organize steps 	<p>Module 4 - Add Manual and System Actions to Process Steps</p> <ul style="list-style-type: none"> ▪ Add a manual action to a process step ▪ Add a system action to a process step
<p>Module 5 - Add Job, Script, and Subprocess Actions to Process Steps</p> <ul style="list-style-type: none"> ▪ Add a job action to a process step ▪ Add a script action to a process step ▪ Add a subprocess action to a process step 	<p>Module 6 - Define Notifications and Rules</p> <ul style="list-style-type: none"> ▪ Define a process-step notification ▪ Define a step-specific escalation rule
<p>Module 7 - Create Splits and Joins</p> <ul style="list-style-type: none"> ▪ Create split and join types ▪ Connect steps with a split ▪ Connect steps with a join 	<p>Module 8 - Create Conditions</p> <ul style="list-style-type: none"> ▪ Verify the process build using the process flow diagram ▪ Create conditions
<p>Module 9 - Finalize a Process</p>	<p>Module 10 - Leverage Additional Process Techniques</p>



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- Define a default escalation rule
 - Identify benefits of process validation
 - Create a process in an object
 - Associate linked objects in a process

Course Agenda, (cont'd)

Module 11 - Perform Process Maintenance

- Start a process
- Monitor a process
- Resolve process errors

Module 12 - Monitor the Process Engine

- Monitor the process engine



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