CA PPM 14.3: Process Management 200

ca technologies

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 14.x (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.

This is a SELF-DIRECTED class consisting of 19.5 hours of self-directed learning including lab activities.

PRODUCT RELEASE

CA PPM 14.3

What You Will Learn

COURSE TYPE, LENGTH & CODE

- Dynamic Labs
- Nineteen and a Half (19.5) Hours
- Course Code: 33CLR2397S

- 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

PREREQUISITES

- Good working knowledge of the core components of CA PPM

For Managers

WHO SHOULD ATTEND

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

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 14.3: User Management 200
  Six and a Half (6.5) Hours
  Course Code: 33CLR2396S

Course Agenda

Module 1 - Define Process Management	Module 2 - Create Processes
• Describe process management benefits • Identify OOTB processes • Modify process flow diagram settings	• Define process properties • Associate a process with an object and a template • Define Start options
Module 3 - Create the Step Structure	**Module 4 - Add Manual and System Actions to Process Steps**
• Edit Start and Finish steps • Create groups • Create Middle steps • Organize steps	• Add a manual action to a process step • Add a system action to a process step
Module 5 - Add Job, Script, and Subprocess Actions to Process Steps	**Module 6 - Define Notifications and Rules**
• Add a job action to a process step • Add a script action to a process step • Add a subprocess action to a process step	• Define a process-step notification • Define a step-specific escalation rule
Module 7 - Create Splits and Joins	**Module 8 - Create Conditions**
• Create split and join types • Connect steps with a split • Connect steps with a join	• Verify the process build using the process flow diagram • Create conditions
Module 9 - Finalize a Process	**Module 10 - Leverage Additional Process Techniques**
• Define a default escalation rule • Identify benefits of process validation	• Create a process in an object • Associate linked objects in a process

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Course Agenda, (cont'd)

Module 11 - Perform Process Maintenance	Module 12 - Monitor the Process Engine
▪ Start a process ▪ Monitor a process ▪ Resolve process errors	▪ Monitor the process engine

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