

# OnDemand CA PPM 15.2: Core Components 200



## Course Overview

CA Project and Portfolio Management (CA PPM) provides your organization with a complete project management solution. You can create projects, define and 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 training based on CA PPM classic interface.

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### PRODUCT RELEASE

CA PPM 15.2

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### COURSE TYPE, LENGTH & CODE

- Web Based Training (WBT)
- Two (2) hours
- Course Code: 33CLR24960

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### PREREQUISITES

- None

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### WHO SHOULD ATTEND

- Project Manager
- Program Office Manager
- IT Services Manager
- Business Analyst
- Application Administrator
- Financial Administrator
- Data Administrator
- System Administrator

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## What You Will Learn

- Navigate the application to gain familiarity with the UI 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.

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## For Managers

This content is designed for all project team members and offers training on all core components of the application. Knowing how to work with these components enables your team members to configure the application in line with their individual preferences and needs. Your team members can assemble and organize pertinent project data so that they can work more efficiently in the application, increasing overall productivity.

**RECOMMENDED  
NEXT COURSES**

- CA PPM 15.2: Time Management 200  
Course Code: 33CLR24970 One (1) hour

## Course Agenda

<p><b>Lesson 1 – Initial Steps: Performing Basic Navigation</b></p> <ul style="list-style-type: none"> <li>Log in and log out</li> <li>Explore the Global Header</li> <li>Navigate the interface using links and keyboard shortcuts</li> <li>Use smart sections</li> </ul>	<p><b>Lesson 2 – Collaboration: Creating a Project for Collaboration</b></p> <ul style="list-style-type: none"> <li>Create a project for collaboration</li> <li>Add a project to the My Projects portlet</li> </ul>
<p><b>Lesson 3 – Collaboration: Managing Project Participants</b></p> <ul style="list-style-type: none"> <li>Add participants to a project</li> <li>Remove participants from a project</li> <li>Make a participant a collaboration manager</li> <li>Create a participant group</li> <li>Edit participant groups</li> </ul>	<p><b>Lesson 4 – Collaboration: Working with Action Items</b></p> <ul style="list-style-type: none"> <li>Create an action item</li> <li>Edit an action item</li> <li>View an assignee's action item</li> </ul>
<p><b>Lesson 5 – Collaboration: Working with Documents</b></p> <ul style="list-style-type: none"> <li>Create a document folder</li> <li>Save a document in a folder</li> <li>Examine document actions</li> <li>Navigate the Knowledge Store</li> <li>Search for documents</li> </ul>	<p><b>Lesson 6 – Collaboration: Working with Discussions</b></p> <ul style="list-style-type: none"> <li>Create a discussion topic</li> <li>Post a message to a discussion topic</li> <li>Reply to a message</li> <li>Manage posted messages</li> </ul>
<p><b>Lesson 7 – Processes: Starting a Process</b></p> <ul style="list-style-type: none"> <li>View a process flow diagram</li> <li>Start a process</li> </ul>	<p><b>Lesson 8 – Processes: Updating a Process</b></p> <ul style="list-style-type: none"> <li>Reject a process action item</li> <li>Review the progress of an initiated process</li> <li>Approve a process action item</li> <li>Determine process progress and view notes</li> </ul>



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## Course Agenda Continued

<b>Lesson 9 – Ideas: Creating Ideas</b>	<b>Lesson 10 – Ideas: Approving and Converting Ideas</b>
<ul style="list-style-type: none"> <li>▪ Create an idea</li> <li>▪ Submit an idea for approval</li> </ul>	<ul style="list-style-type: none"> <li>▪ Approve an idea</li> <li>▪ Convert an idea</li> </ul>
<b>Lesson 11 – Routine Operations: Working with the Organizer</b>	<b>Lesson 12 – Routine Operations: Running Reports</b>
<ul style="list-style-type: none"> <li>▪ Examine the Action Items tab</li> <li>▪ Examine the Tasks tab</li> <li>▪ Examine the Processes tab</li> <li>▪ Examine the Notifications tab</li> <li>▪ Delete notifications</li> </ul>	<ul style="list-style-type: none"> <li>▪ Save report parameters</li> <li>▪ Run a report</li> <li>▪ Schedule a report to run</li> <li>▪ Print the Gantt</li> </ul>
<b>Lesson 13 – Personalization: Configuring List Page Content</b>	<b>Lesson 14 – Personalization: Configuring List Page Format and Filters</b>
<ul style="list-style-type: none"> <li>▪ Add a new column to a list page</li> <li>▪ Create a link item on a list page</li> <li>▪ Change the sort order of a list page</li> <li>▪ Edit the data in a list page</li> <li>▪ Export list page data to Excel</li> </ul>	<ul style="list-style-type: none"> <li>▪ Set a secondary value for a list field</li> <li>▪ Configure secondary value</li> <li>▪ Create aggregation rows</li> <li>▪ Add a field to the list page Filter section</li> <li>▪ Remove a filter field from the list Filter Layout page</li> <li>▪ Change the parameters of a filter field</li> <li>▪ Save a filter</li> <li>▪ Create a power filter</li> <li>▪ Restore a view back to default settings</li> </ul>



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## Course Agenda Continued

<p><b>Lesson 15 – Personalization: Configuring the Overview Pages</b></p>	<p><b>Lesson 16 – Personalization: Configuring Personal Portlets and Dashboards</b></p>
<ul style="list-style-type: none"> <li>▪ Add a portlet to a page</li> <li>▪ Configure a portlet</li> <li>▪ Manage tabs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Create a portlet</li> <li>▪ Create a dashboard</li> <li>▪ Add portlets to a dashboard</li> <li>▪ Manage a dashboard</li> </ul>
<p><b>Lesson 17 – Personalization: Configuring the Home Page and Account Settings</b></p>	<p><b>Lesson 18 – Personalization: Configuring Your Favorites Menu</b></p>
<ul style="list-style-type: none"> <li>▪ Set an Avatar</li> <li>▪ Change you Home page</li> <li>▪ Review personal information</li> <li>▪ Review Home page settings</li> <li>▪ Set a proxy</li> <li>▪ Set notifications</li> <li>▪ Access additional software</li> <li>▪ Examine default partition settings</li> </ul>	<ul style="list-style-type: none"> <li>▪ Add entries to the Favorites menu</li> <li>▪ Manipulate the entries on the Favorites menu</li> </ul>



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