

PPM 15.4: Ad Hoc Views, Reports and Dashboards 200

Course Summary

Description

Having the right data at your fingertips is critical for making decisions in a software-driven business environment. Facilitating access to project-related data is a key focus for Project & Portfolio Management (PPM) 15.4. With the Jaspersoft reporting feature in PPM, you can assist your organization in meeting its business reporting goals. This feature provides you with a lightweight, easy-to-use, drag-and-drop, self-service ad hoc reporting capability.

Jaspersoft enables you to create and deploy company specific reports fast and efficiently. This class will give students the practical experience to build ad hoc views, reports, and dashboards against project and other investment data to drive organizational intelligence. This course does not teach how to use Jaspersoft Studio and is based on CA PPM classic interface.

Objectives

At the end of this course, students will be able to:

- Quickly enable users to display data in a table, chart, or crosstab format that best meets their business requirements.
- Provide easy-to-use, interactive reports where filter options and results appear in the same window.
- Offer users more report scheduling and export options.

Topics

- Describe PPM Advanced Reporting
- Create and Configure Ad Hoc Views
- Generate Reports
- Create Dashboards

Audience

This course is intended for those users who want hands-on training in user management.

Prerequisites

Students should have a good working knowledge of PPM 15.x core components, time management, business administration, project and investment management, and resource management.

Duration

One day

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Course Outline

- I. Describe PPM Advanced Reporting*
 - A. Identify key Advanced Reporting UI components
 - B. View Advanced Reporting menus, libraries, and repositories

- II. Create and Configure Ad Hoc Views*
 - A. Define an ad hoc view
 - B. Apply an eight-step process to create a Table ad hoc view
 - C. Create a Chart ad hoc view
 - D. Create a Crosstab ad hoc view

- III. Generate Reports*
 - A. Review and run OOTB reports
 - B. Configure reports

- IV. Create Dashboards*
 - A. Define a dashboard
 - B. Create a dashboard
 - C. Apply input controls to a dashboard