regoconsulting

CA PPM Expertise On Demand

Using WEBI with CA PPM

COURSE DESCRIPTION

Using WEBI with CA PPM is intended for non-technical users who want to analyze CA PPM data and create reports without needing an in-depth understanding of SQL and the CA PPM Data Model.

AUDIENCE – Any CA PPM user

COURSE TYPE – Onsite / Online

PREREQUISITES – None

DURATION – 8:00 AM to 5:00 PM; one-hour lunch

COURSE OUTLINE

Introduction
- Class Objectives
- What is WEBI?
- Benefits of Using WEBI

InfoView
- Accessing and Navigating InfoView
- Viewing WEBI Reports
- Exporting to Excel/PDF

WEBI Basics
- Launching WEBI
- Main Components of the WEBI Interface
- Creating a Simple Report

Universes
- The Universe and its Purpose
- Universe Components (classes, dimensions, details, and measures)
- CA PPM Universes and What They Contain
  - o Investments
  - o Investment Financials
  - o Timesheets
  - o Resources

Writing WEBI Queries
- Result Objects
- Query Filters
  - o Operators
  - o Criteria
  - o Prompts
- Data Relationships
- Modifying a Query

Displaying the Data
- Data Panel – Add/Remove Fields
- Templates Panel
  - o Tables
  - o Graphs
  - o Free Standing Cells

Organizing the Report
- Sections (Grouping)
- Summarizing
- Sorting
- Report Tabs
- In-Report Filters

Formulas
- Formula Editor
- Creating Variables

Formatting
- Properties Tab
- Numbers and Dates

Sharing Reports
- Exporting
- Shared Folders
- Scheduling & Emailing