# The Cora Customer Portal: An Overview

September 2020

With Derry Lynch

cora

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### Today's Agenda

#### **Accessing The Portal**

**Using Our Solutions Library** 

**Cora Customer Portal Roadmap** 

Q&A (See Tab on Side of Screen)



Derry Lynch, Head of Cora's Customer Success Team

# Agenda

- Accessing the Portal
  - Via CoraPPM
  - Directly via <u>https://cst.corasystems.com/support/home</u>
  - Ensure you are a Registered User- Contact us via <a href="mailto:support@corasystemsltd.Freshservice.com">support@corasystemsltd.Freshservice.com</a>
- Using our Solutions Library
  - Webinars
  - Product Documentation
  - Videos
- Cora Portal Roadmap Activities
  - Documentation Update
  - Newsletters and Webinars
  - Mobile App

### **Cora Customer Portal**

COI a Cora Systems

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TICKETS

SERVICE CATALOG

Q Enter your search term here...



SOLUTIONS

HOME

Cora Customer Portal Webinar 1 Sep, 2020 Check out our New Features Webinar with our Product Owner Nick Hall 12 Aug, 2020



Your Tickets All your tickets, responses & activities



Pending Approvals Requests waiting for your Approval



Report an Incident Raise an incident with your support team

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**Request New Service** 

Raise a request for a new device or service



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New Ticket

**Browse Solutions** 

Find the answers to your queries in our exhaustive solutions



#### **Popular Solutions**

#### View all articles

CoraPPM Review and Roadmap August 2020

## Accessing the Portal via CoraPPM

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### **Cora Customer Portal- Solutions**

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Solutions Explore How-To's and learn best practices from our knowledge base.		
Getting Started (6)	Videos (18)	
🗐 Logging In	Overview of Cora PPM Navigation	
Passwords	Overview of Dashboard Widgets	
An overview of Cora PPM's functionality	🗐 Cora PPM Dashboards	
What is the OOTB configuration for Risks in Cora PPM?	🗐 Reporting - Snapshot Report	
The different User Types in Cora PPM	🗐 Reporting - Report Builder	
» See all 6 articles	» See all 18 articles	
What's New in 1.4 (16)	<b>FAQ</b> (27)	

Over 100 Articles, Videos, Documents, Webinars and other collateral to assist our customers with using PPM

## **Cora Customer Portal- Documentation**

#### The Gantt Chart

Modified on: Wed, 9 Sep, 2020 at 1:59 PM

#### The Gantt Chart

The Gantt Chart is a commonly used chart in project management which shows activities displayed against time.

The Gantt chart is a visual view of tasks scheduled over time. Gantt charts are used for planning projects of all sizes and they are a useful way of showing what work is scheduled to be done on a specific day. They also help you view the start and end dates of a project in one simple view.

The Gantt chart shows the project schedule and the linkages between the various tasks on the project and it allows you to view and modify the timeline of your project.

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We will be covering the following subtopics:

- Managing tasks
- Operating the tool bar
- Importing and exporting scheduling information
- Utilising further Gantt Chart functionality

**Related** Articles

Importing and Exporting from Microsoft Project (...

How to prepare for MSP Imports

What's new in 1.2

Timesheet Import Template

What's new in 1.0

Understanding Constraints and Critical Path

- 🗐 Virus Scanning on Document Attach and Upload
- Microsoft Projects Import and Export Guidance
- Snapshot Report Additional Chart Types

Getting Started

### **Cora Customer Portal- Videos**

#### Solution home / Cora PPM / What's New in 1.5

#### Dashboards Hide Graphic When Expanded

Modified on: Thu, 10 Sep, 2020 at 12:14 PM

#### Hide Graphic When Expanded:

When expanding a dashboard widget to show the data behind, the widget graphic still takes up some space at the top of the page. To allow you to view more data, it is now possible to hide the widget graphic:

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#### **Related Articles**

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#### What's New in 1.5

Dashboards: New Widget Graphics

Programme Structure – Retain Settings

What's new in 1.0

Snapshot Report Tasks - Assigned Resources Colu...

Snapshot Report Additional Chart Types

Dashboards Project Types

What's New In v1.4

Risks – Calculated Expected Cost

What's new in 1.2

### **Cora Customer Portal- Webinars**

Q Enter your search term here...

Solution home / Cora PPM / Webinars

#### CoraPPM Review and Roadmap August 2020

Modified on: Mon, 17 Aug, 2020 at 10:55 AM

In this Webinar, Cora's Product Owner Nick Hall brings us through some new features provided in the latest releases of CoraPPM and also provides a preview of what's coming as part of the CoraPPM roadmap.



#### **Related** Articles

E

Link to Cora PPM Release Review Blog Post
 Microsoft Projects Import and Export Guidance
 Importing and Exporting from Microsoft Project (...
 Security Event Logging Policy and Security Valida...
 Understanding Constraints and Critical Path
 Getting Started
 Webinar: Resource Management made easy with ...
 What's New in 1.5
 What's New In v1.4
 What's New in 1.3

# Logging a Ticket

Fill in the Cora PPM site URL, what screen the problem happened on and any action leading up to the issue.

		Q 🕘 🌆
Submit a ticket		Related articles
Email Address .	customer@coratystems.com	Mobile App Guide A guide to Using the CoraPPM Mobile App on IC
	Cora Customer	
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Any actions leading up to the issue	Returning to the home page_[	



## **Cora Customer Portal Roadmap and Activities:**

- Monthly Newsletters and mailshots with content updates
- Extension of the Solutions Library
  - Documentation
  - Videos
  - How To
- Further Integration between CoraPPM and The Customer Portal
- Mobile App



# **Find Out More**

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