



Hewlett Packard Enterprise

Course Data Sheet

PPM125 – Using Project and Portfolio Management 9.x

Course No.: PPM125-93	Category/Sub Category: Project and Portfolio Management
For software version(s): 9.3 Software version used in the labs: 9.3	Course length: 4 days
Delivery formats: Instructor Led (ILT) and Virtual Instructor Led (VILT)	Training is also available as a private session onsite.
To order visit: http://h20546.www2.hp.com/main/US/	

Course Description

This four-day course is designed to familiarize you with the HPE Project and Portfolio Management (PPM) application and how it can be used to organize and run your strategic projects. Hands-on lab exercises provide you with the opportunity to explore and apply the Project Management tools and best practices for managing a project's schedules, resource demands and capacity, estimated and actual costs, and its overall health.

The hands-on labs use version 9.3 of the software.

Audience / Job Roles

This course is recommended for project managers, portfolio managers, and PMO personnel who intend to use PPM in planning, executing, and monitoring both small-scale and large-scale projects.

Course Objectives

Upon successful completion of this course, you should be able to:

- Utilize planning strategies and Project Management features to effectively forecast staffing requirements, budgets, and resource commitments
- Define the projected costs, resources, and time necessary to execute a project
- Determine if the available resources on your team have the skills required for your project tasks
- Analyze the impact of your project requirements on your organizational resources and budget
- Use Dashboard portlets, reports, and analysis graphs to communicate the status of your project to your executive team and analyze your IT portfolio
- Identify the common roles and responsibilities of users of Portfolio Management: business analysts, program managers, portfolio managers, administrators, and executive sponsors
- Utilize planning strategies to effectively forecast staffing requirements, budgets, and resource commitments for a portfolio
- Analyze the impact of your Portfolio requirements on your organizational resources and budget

Prerequisites / Recommended Skills

To be successful in this course, you should have the following prerequisites or knowledge.

- Experience with Windows operating systems
- Knowledge of relational databases and database terminology
- Some experience with the Project and Portfolio Management (PPM) software is beneficial

Learning Path



Certification

N/A

Course Topics

Modules	Objectives
Module 1 – Course Overview	<ul style="list-style-type: none"> • Course objectives • Class topic schedule • Daily schedule • Instructor and student introductions • Class Logistics • Participants requests • HP MyRooms tour • MyRooms toolbar • Indicating your status • Annotations • Information about eBooks • Related courses and learning path • Certification • Summary • Feedback
Module 2 – Personalizing Your Dashboard	<ul style="list-style-type: none"> • Recognize the options that end users have for personalizing their dashboards • Set portlet display preferences • Add, remove, and rearrange portlets in your dashboard • Use preconfigured dashboard pages
Module 3 – Introduction to Project Management	<ul style="list-style-type: none"> • Identify the solutions that Project Management provides, and how these solutions integrate with Demand Management, Portfolio Management, and Program Management • Recognize the phases of the project management lifecycle and how each is supported in Project Management • Identify the roles involved in each phase of the project management lifecycle
Module 4 – Creating a Project	<ul style="list-style-type: none"> • Create a new project • Identify the elements of a project definition • Recognize the purpose of project types • Enter basic project parameters • Determine the type of roles to assign to project participants that will allow them the right level of access to the project • Process and track a project through its workflow
Module 5 – Defining Resource Requirements	<ul style="list-style-type: none"> • Describe the building blocks that PPM Center uses to model your organization's resource supply • Identify what information you can find in resource profiles, calendars, and organization units and how you can use them when selecting and scheduling resources • Create a staffing profile to define the resource requirements of your project • Use the staffing profile to request resource allocations from resource managers

Module 6 – Building a Work Plan	<ul style="list-style-type: none"> • Identify the functions of a work plan • Create and edit a work plan • Use different work plan views • Export the work plan for use in an environment other than PPM Center • Create a work plan baseline
Module 7 – Assigning Resources	<ul style="list-style-type: none"> • Analyze resource pool capacity and assignment load • Use the Resource Finder utility to identify resource availability and skills match • Assign resources to a task • Adjust scheduled effort for assigned resources
Module 8 – Working with the Project Financial Summary	<ul style="list-style-type: none"> • Forecast costs and benefits for projects • Capture actuals for projects and roll these costs up to programs • Monitor project costs against plan and against approved budget • Automatically roll up actual labor costs to the project costs based on actual efforts reported from the work plan
Module 9 – Configuring Work Plan Templates and Project Types	<ul style="list-style-type: none"> • Create a work plan template • Create a project type • Configure project policies
Module 10 – Managing Project Execution	<ul style="list-style-type: none"> • Activate a work plan and track how task and schedule information is distributed to the project sponsors and resources • Use the Project Overview page to monitor overall project health and timeline • Interpret the information provided by the graphical status indicators in the Project Overview page • Identify the project policies that drive how project health is calculated • Submit and monitor project issues, risks, and scope changes from the Project Overview page
Module 11 – Scheduling the Work Plan	<ul style="list-style-type: none"> • Link a task to other tasks within the same work plan, tasks from other work plans, and requests that are processed through Demand Management • Define scheduling constraints to control the start and finish dates of a given task • Set up a milestone to alert you of the schedule and completion of significant events during the project execution • Interpret error and warning messages that are generated after a schedule run and identify possible solutions for resolving them • Use visualizations in the work plan to track tasks in the critical path • Identify Work Plan, Project Fields, and Scheduling project settings that affect how a work plan is built and scheduled

Module 12 – Analyzing Project Finances	<ul style="list-style-type: none"> • Use work plan views to analyze the ongoing costs of a project • Define cost rate rules for calculating the labor costs • Modify the cost factors for a resource • Analyze the cumulative and current costs for your projects
Module 13 – Using Time Management	<ul style="list-style-type: none"> • Create, update, and submit a new time sheet • Approve time sheets submitted by your project team members • Personalize your Dashboard to use Time Management portlets • Configure a project to use Time Management to track actual project effort • Configure a project to use Time Management to calculate actual labor costs
Module 14 – Using Program Management	<ul style="list-style-type: none"> • Explain the benefits of a program management strategy • Create a new program • Link your projects to an existing program • Submit risks and issues for review by a program manager • Use Dashboard portlets to manage program risks and issues
Module 15 – Microsoft Project Integration	<ul style="list-style-type: none"> • Choose an integration strategy for integrating Microsoft Project and PPM • Identify the minimum system requirements for integrating Microsoft Project and PPM • Export a Microsoft Project plan to PPM • Import a PPM work plan into Microsoft Project • Synchronize a work plan between PPM and Microsoft Project
Module 16 – Portfolio Key Concepts	<ul style="list-style-type: none"> • Describe an end-to-end portfolio management scenario from proposal through asset recognition • Submit a proposal, including basic information such as the business objective and high-level requirements • Review and process a step in a previously submitted proposal
Module 17 – Developing Proposal Staffing Requirements	<ul style="list-style-type: none"> • Forecast staffing requirements for a proposal • Create a staffing profile in PPM • Link a staffing profile to an active proposal • Update the fields on an active staffing profile
Module 18 – Working with Financial Summaries	<ul style="list-style-type: none"> • Develop a high-level justification for a proposal • Work with the Financial Summary of a proposal • Enter the cost forecasts and actuals in PPM • Update the approved budget for a proposal • Enter the benefit forecasts and actuals in PPM to illustrate and track nominal return

<p>Module 19 – Building a Portfolio</p>	<ul style="list-style-type: none"> • Add value and risk ratings to a proposal • Take action to process a proposal through to closure • Add a new project to your portfolio • Add a new asset to your portfolio
<p>Module 20 – Analyzing a Portfolio</p>	<ul style="list-style-type: none"> • Locate and review the health of a project created by an approved proposal • Identify high-risk projects and assets in your portfolio • Personalize your Dashboard to monitor projects, proposals, and assets • Create personalized Dashboard pages to monitor the status of your resources and budgets • Build scenario comparisons that simulate the consequences of approving new proposals or terminating current projects or assets • Create a new scenario comparison with proposals, projects, and assets to be evaluated • Add what-if comparisons of approving or terminating the projects or assets contained in a scenario comparison • Generate graphs that compare each scenario by cost, by resource needs, and by anticipated financial benefits