



PPM 9.5

Project, Portfolio, and Program Management

Adoption Readiness Tool (ART)

The Adoption Readiness Tool (ART) provides initial and ongoing enablement to your users to ensure that you get the most out of your software. ART is a cost-effective, comprehensive IT education, documentation and performance support solution. ART provides pre-built simulation-based courses in Micro Focus software that can be accessed by users anytime, anywhere.

ART content provides easy access to self-paced learning content enabling your users to not only dive into an online course, but also to gain direct access to individual components to quickly master specific tasks.

- Access printable job aids targeted towards specific application tasks.
- View or practice a task in a simulated environment.
- Experience full learning with key terms and concepts, product demonstrations and self-assessments by viewing the entire course.

Regardless of which route chosen, users will gain an understanding of the important key concepts, as well as gain competency in both the navigation and functionality of the application.

Course Description

This Project and Portfolio Management (PPM) 9.5 learning solution offers end users who are new to the PPM software the opportunity to develop experience in applying the fundamental concepts, principles, and methodologies for managing the project, portfolio, and program components of the PPM software. This course is recommended for individuals who are responsible for managing projects, portfolios, and programs for the organization.

The simulations in this course use PPM version 9.5

Audience/Job Roles

Project managers, portfolio managers, business analysts, and program managers.

Course Objectives

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

- Forecast, plan, staff, schedule, and manage your projects
- Manage and analyze resource requirements, skills, demand, and capacity
- Monitor and track project task assignments
- Describe the Portfolio Management tools and their functions
- Define and link business objectives to proposals, projects, and assets
- Create, process, and evaluate proposals
- Create, implement, and evaluate projects
- Declare and review assets
- Link budgets, staffing profiles, and financial benefits to proposals and projects
- Build scenario comparisons
- Create and update program definitions
- Associate projects to a program
- Define program metrics and exception rules and set program access restrictions
- Create and process scope changes, risks, and issues across projects

Prerequisites / Recommended Skills

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

High speed Internet connection

Web browser (IE7+ or Firefox 3.5+)

Course Topics

Program Management	
Modules	Objectives
Module 1: Introduction to Program Management	<ul style="list-style-type: none"> • Introduction • Objectives • About Program Management • Navigate Program Management Functions * • Add Program Management Portlets* • Summary • Assessment
Module 2: Use the PPM Interface	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Dashboard Login Components • Log In to the PPM Dashboard * • Personalize the Dashboard * • Portlets Overview • Personalize Portlets * • Access Help * • Create References * • Run a Search * • Create and Schedule Reports * • PPM Workflow • Summary • Assessment
Module 3: Establish Business Objectives	<ul style="list-style-type: none"> • Introduction • Objectives • Define a Business Objective * • Review, Update, Delete Business Objectives * • Summary • Assessment
Module 4: Create Programs	<ul style="list-style-type: none"> • Introduction • Objectives • Create a Program * • Associate a Project to a Program * • Define Program Settings * • Set Program Access Restrictions * • Program Header • Program Business Objectives • Program Content • Program Details • Program Workflow • Program Timeline • Program Costs • Program Notes

	<ul style="list-style-type: none"> • Program References • Summary • Assessment
Module 5: Work with Programs	<ul style="list-style-type: none"> • Introduction • Objectives • Prioritizing Programs • Managing Programs • Managing Scope Changes • Create a Scope Change Request * • Monitoring a Scope Change • Process a Scope Change * • Managing Risks • Create a Risk * • Process a Risk * • Managing Issues • Create an Issue * • Process an Issue * • Analyze a Program * • Summary • Assessment

Project Management

Modules

Objectives

Module 1: Introduction to Project Management	<ul style="list-style-type: none"> • Introduction • Objectives • About Project Management • View Elements of a Project * • Project Management Roles • Summary • Assessment
Module 2: Use the PPM Interface	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Dashboard Login Components • Log In to the PPM Dashboard * • Personalize the Dashboard * • Portlets Overview • Personalize Portlets * • Access Help * • Create References * • Run a Search * • Create and Schedule Reports * • PPM Workflow • Summary • Assessment

<p>Module 3: Use Project Management</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Project List Portlet • Explore Project Portlets * • Project Search Page • Search for a Project * • Summary • Assessment
<p>Module 4: Create a Project</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Initiate a New Project * • Adjust Project Policies * • Restrict Project View Access * • Define Project Participant Groups • Declare Project Managers and Stakeholders * • Review Project Details * • Summary • Assessment
<p>Module 5: Define and Build a Work Plan</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Work Plan Views • Quick View • Schedule View • Actuals View • Costing View • Earned Value View • Gantt View • Printing View • Custom View • Editing and Navigation Tools • Page Navigation • Filter • Expand • Task Details • Schedule Work Plan • Export Work Plan • Edit • Actions • Create a Work Plan from Scratch * • Create a Work Plan from a Template * • Create a Task List * • Add Predefined Tasks from a Work Plan * • Summary • Assessment

<p>Module 6: Define and Request Resources</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Staffing Profile Overview • Review Staffing Profile Elements * • Create a Staffing Profile * • Request a Staffing Profile Position * • Enter a Position Skill Requirement * • Import Staffing Profile Positions * • Repeating the Process • Summary • Assessment
<p>Module 7: Assign Resources</p>	<ul style="list-style-type: none"> • Introduction • Objectives • About Assign Resources • About Policies • Assign a Named Resource * • About the Resource Finder • Use the Resource Finder * • Associate a Role to a Task * • Review Project Resource Usage * • Summary • Assessment
<p>Module 8: Schedule the Work Plan</p>	<ul style="list-style-type: none"> • Introduction • Objectives • About Scheduling Constraints • Define a Scheduling Constraint * • About Errors and Warnings • Define Predecessor Requests * • Set a Milestone * • About Baselines • Create a Baseline * • Compare Baselines * • Activate a Work Plan * • Summary • Assessment
<p>Module 9: Plan the Project Cost</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Review the Financial Summary * • About Project Financial Management Policies • About Cost and Earned Value Alerts • View Forecast and Actuals * • Add a Cost Line * • Modify a Cost Line * • Add a Budget * • Summary • Assessment

Module 10: Manage the Project Execution	<ul style="list-style-type: none"> • Introduction • Objectives • My Tasks • Monitoring the Project Schedule • Review Schedule, Issues, and Cost Health * • Track Milestones * • Managing the Project Process • Process a Project Issue * • Process a Project Risk * • Process a Scope Change Request * • Track Project Costs * • Override Project Health * • Summary • Assessment
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Portfolio Management	
Modules	Objectives

Module 1: Introduction to Portfolio Management	<ul style="list-style-type: none"> • Introduction • Objectives • Portfolio Management Defined • What is a Portfolio? • Portfolio Dashboard • Benefits of Portfolio Management • Summary • Assessment
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Module 2: Use the PPM Interface	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Dashboard Login Components • Log In to the PPM Dashboard * • Personalize the Dashboard * • Portlets Overview • Personalize Portlets * • Access Help * • Create References * • Run a Search * • Create and Schedule Reports * • PPM Workflow • Summary • Assessment
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Module 3: Define Business Objectives	<ul style="list-style-type: none"> • Introduction • Objectives • Global Strategic Themes • Add Global Strategic Theme • KPIs • Manage KPIs • Establishing Business Objectives
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	<ul style="list-style-type: none"> • Define Business Objectives * • Review Business Objectives * • Summary • Assessment
Module 4: Create, Track, and Process Proposals	<ul style="list-style-type: none"> • Introduction • Objectives • Proposal Development Process • Phase 1: Creating a Proposal • Create a Proposal * • Proposal Staffing Profile Overview • Create a Proposal Staffing Profile * • Forecasting Financial Benefits • Add a Proposal Financial Summary * • Creating and Estimating a Proposal Budget • Create a Proposal Budget * • Phase 2: Tracking a Proposal • Track a Proposal * • Phase 3: Processing a Proposal • Process a Proposal * • Summary • Assessment
Module 5: Add Value and Risk Ratings	<ul style="list-style-type: none"> • Introduction • Objectives • Evaluation Criteria • Add Value and Risk Ratings * • Summary • Assessment
Module 6: Initiate and Monitor a Portfolio	<ul style="list-style-type: none"> • Introduction • Objectives • Creating a Portfolio • Initiate a Portfolio * • Monitoring a Portfolio • Monitor a Portfolio * • Summary • Assessment
Module 7: Asset Management	<ul style="list-style-type: none"> • Introduction • Objectives • Benefits of Asset Management • Declare an Asset * • Personalizing Portlets • Monitor an Asset * • Reviewing an Asset • Summary • Assessment

Module 8: Filter and Customize Your Portfolio	<ul style="list-style-type: none"> • Introduction • Objectives • Filtering the Portfolio by Category Portlet • Filtering the Portfolio Map • Customizing the Portfolio Map • Analyze Your Current Portfolio * • Summary • Assessment
Module 9: Create Scenario Comparisons	<ul style="list-style-type: none"> • Introduction • Objectives • About Scenario Comparisons • Using Comparison Views • Create a Scenario Comparison * • View and Edit Scenario Details * • Add Content to a Scenario * • Summary • Assessment

* Indicates a simulation.