



PPM Demand, Deployment, Resource, and Time Management 9.3

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 selfassessments 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 PPM 9.3 learning solution offers end users who are new to the Micro Focus PPM topics Demand, Deployment, Resource, and Time Management the opportunity to develop experience in applying the fundamental concepts, principles, and methodologies for managing requests, deployments, resource requests, and time management components of PPM. This course is recommended for individuals who are responsible for managing requests, deployments, resources, and programs for time tracking for the organization. The simulations in this course use PPM version 9.3.

Audience/Job Roles

This course is recommended for IT managers, resource managers, business analysts, and time managers.

Course Objectives

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

- Identify the key components of Demand Management.
- Describe the role of Workflows.
- Summarize the progress of a request.
- Outline the key concepts of the Demand Security Model.
- Generate reports to analyze and manage the demand from your organization.
- Plan, manage, package, and/or deploy software changes.
- Explain how resource supply is defined in Resource Management.
- Create, search, and manage resource pools.
- Create an organization unit.
- Search for available resources for a project.
- Use version control.
- Manage libraries and baselines.
- Create reports and analysis.
- Create a Time Sheet and enter activity details, charge codes, line details, and notes to your Time Sheet.
- Review your time entries to ensure accuracy and submit your Time Sheet for approval.
- Approve Time Sheets for payment, or reject and return to original Time Reporter for correction.
- Freeze Time Sheets to prevent change.

Prerequisites / Recommended Skills

N/A

Course Topics

Modules	Objectives
Demand Management	
Module 1: Introduction	<ul style="list-style-type: none">• Introduction• Objectives• Demand Management Process• Demand Management Features *• Workflow Defined• Workflow Attributes• Security Layers

	<ul style="list-style-type: none"> • Summary • Assessment
Module 2: Use the PPM Interface	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Roadmap • PPM Dashboard and Login Components • Log In to the PPM Dashboard* • Personalize the Dashboard* • Portlets Overview • Personalize Portlets* • Create Notes* • Create References* • Run a Search* • Create and Schedule Reports* • Summary • Assessment
Module 3: Initiate a Request	<ul style="list-style-type: none"> • Introduction • Objectives • Request Types and Request Numbers* • Create a Request* • Copy Requests • Delete Requests • Preview and Print a Request • Summary • Assessment
Module 4: Track a Request	<ul style="list-style-type: none"> • Introduction • Objectives • My Requests Portlet • Request Activity Portlet • Open Requests by Priority Portlet • Search Requests* • Search Results • Summary • Assessment
Module 5: Process Requests	<ul style="list-style-type: none"> • Introduction • Objectives • Processing Requests • E-mail Notifications • Check Request Status • Additional Status Views* • Use Step Actions* • Link Related Requests* • Summary • Assessment

Module 6: Generate Reports	<ul style="list-style-type: none"> • Introduction • Objectives • My Reports, View Reports, and Create Reports • Submit a Report* • Schedule a Report* • Send Report Notifications* • Summary • Assessment
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Deployment Management	
Module 1: Introduction	<ul style="list-style-type: none"> • Introduction • Objectives • Deployment Management Features • Deployment Management Roles • Package Features • Package Features - Examples • Deployment Management Portlets* • Package Line Details • Summary • Assessment
Module 2: Use the PPM Interface	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Roadmap • PPM Dashboard and Login Components • Log In to the PPM Dashboard* • Personalize the Dashboard* • Portlets Overview • Personalize Portlets* • Create Notes* • Create References* • Run a Search* • Create and Schedule Reports* • Summary • Assessment
Module 3: Deployment Management Interfaces	<ul style="list-style-type: none"> • Introduction • Objectives • Deployment Management Interfaces* • Installing the Workbench Plug-In • Install the Workbench Plug-in* • Workbench Interface • Web Interface • Summary • Assessment

Module 4: Create a Package	<ul style="list-style-type: none"> • Introduction • Objectives • Object Types • Create a Package* • Add Package Lines* • Add Notes • Add Notes and References* • Package Submission • Submit a Package* • Summary • Assessment
Module 5: Process a Package	<ul style="list-style-type: none"> • Introduction • Objectives • Process a Package • Process a Package from the Workbench* • Process Migration Steps • Migrate a Package* • Create Execution Logs* • Access Process Views* • Update a Package* • Summary • Assessment

Resource Management	
Module 1: Introduction	<ul style="list-style-type: none"> • Introduction • Objectives • Resource Management • Resources Supply Model • Resource Pool Overview • Manage Resource Pool • Resource Pool Page • Staffing Profile • Resource Profiles: Overview • Resource Profiles: Role/Skill Tab • Resource Profiles: Calendar Tab • Resource Profiles: Time Management Tab • Resource Profiles: Capacity/Load Tab • Add Resources to a Resource Pool* • Create a Resource Pool* • Create an Organization Unit* • Analyze Pool Capacity* • Search Resource Pools* • Summary • Assessment

<p>Module 2: Use the PPM Interface</p>	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Roadmap • PPM Dashboard and Login Components • Log In to the PPM Dashboard* • Personalize the Dashboard* • Portlets Overview • Personalize Portlets* • Create Notes* • Create References* • Run a Search* • Create and Schedule Reports* • Summary • Assessment
<p>Module 3: Establish Roles and Skills</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Establish Roles • Manage Roles* • Browse Skills • Manage Skills* • Summary • Assessment
<p>Module 4: Regional Calendars</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Regional Calendars • Manage Regional Calendars* • Summary • Assessment
<p>Module 5: Define Organization Units</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Organization Units • Manage an Organization Unit* • Summary • Assessment
<p>Module 6: Define and Request Resources</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Define Resource Profiles • Configure Resource Attributes* • Staffing Profile Overview • Resource Pool - Staffing Profile Relationship • Define a Position Requirement* • Enter Effort Estimates* • Switch Between Effort Units • Send Resource Requests* • Track Resource Request Status • Repeat the Process

	<ul style="list-style-type: none"> • Summary • Assessment
Module 7: Assign Resources	<ul style="list-style-type: none"> • Introduction • Objectives • Assign Resources • Cost and Effort Policy • Resource Finder • Project Resource Usage* • Associate a Role to a Task* • Assign Named Resources* • Assign the Same Resources to Multiple Tasks* • Import a Position • Configure Notifications • Summary • Assessment

Time Management

Module 1: Introduction	<ul style="list-style-type: none"> • Introduction to Time Management • Objectives • Time Management Workflow • Time Sheets • Time Reporters * • Time Approvers * • Summary • Assessment
Module 2: Use the PPM Interface	<ul style="list-style-type: none"> • Introduction • Objectives • PPM Roadmap • PPM Dashboard and Login Components • Log In to the PPM Dashboard* • Personalize the Dashboard* • Portlets Overview • Personalize Portlets* • Create Notes* • Create References* • Run a Search* • Create and Schedule Reports* • Summary • Assessment

<p>Module 3: Create a Time Sheet and Reporting Details</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Time Sheets and the Time Breakdown Tab • Create a Time Sheet and Enter Time* • Other Actuals Tab • Add Activity Details, Charge Codes and Notes • Submit the Time Sheet • Summary • Assessment
<p>Module 4: Search, Copy, and Print Time Sheets</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Time Management Portlets • Search for a Time Sheet * • Copy a Time Sheet * • Print Your Time Sheet • Summary • Assessment
<p>Module 5: Approve, Freeze, and Close Time Sheets</p>	<ul style="list-style-type: none"> • Introduction • Objectives • Approver Responsibilities • Time Sheet Status • Time Sheets Waiting for Approval • View Work Allocations • Send Review Notes • Reject Time Sheet Lines • Approve Time Sheet Lines • Freeze a Time Sheet • Close a Time Sheet • Summary • Assessment

*Indicates Simulation