

# HPE PPM120 – PPM Center 9.0 Essentials

## Overview

This classroom course is an ideal way to launch your Project and Portfolio Management (PPM) Center implementation, and will create a solid foundation for your implementation decisions. An experienced instructor will guide participants using hands-on exercises through the design and configuration of the major setup components of Demand Management and Deployment Management to enable automation of your organization's processes.

## Learning Method

You will receive expert instruction from a HPE PPM specialist who will present the course using slide presentation and facilitated discussion. At the end of each chapter there will be review questions followed by a hands on exercise to ensure understanding of each lesson.

Each student will receive a copy of the Project and Portfolio Management (PPM) Essentials manual. This manual is used throughout the course and proves a useful reference tool upon completion of the course.

**Duration:** 5 days

## Who will benefit from this course?

This course is recommended for all members of your PPM project team, including project managers, business analysts, technical administrators, and functional experts

## Prerequisites for this course

- Experience with Windows operating systems
- Knowledge of relational databases and database terminology

## What can you expect to gain from this course?

At the end of the course, you will be able to:

- Identify business processes that can be automated through PPM Center.
- Write basic design requirements for a PPM Center implementation.
- Create and process requests by using PPM Center.
- Set up user accounts to define who has access to PPM Center and what functionalities they have permission to use.
- Personalize your PPM Center Dashboard according to your specific requirements as an end user.
- Publish and distribute Dashboard modules.
- Design and configure request workflows to automate request resolution processes.
- Configure request types to identify information that needs to be collected during request resolution processes.
- Identify requirements for integrating request and package processes.



## Course Content

### Module 1: Course Overview

- Review course objectives
- Review the class schedule
- Review class logistics and daily schedule
- Review virtual classroom settings
- Conduct introductions
- Review eBooks
- Review related courses and learning path
- Review certifications

### Module 2: Processing Requests and Packages

- Identify the HPE Project and Portfolio Management (PPM) Center applications and the solutions they provide
- Create and process requests
- Create and process packages
- Update tasks and track project status

### Module 3: Managing User Accounts and Licenses

- Create user accounts
- Define the appropriate authentication settings for each user account
- Grant licenses that are relevant to the roles of each user

### Module 4: Managing Security

- Identify the different security layers that can be implemented in HPE Project and Portfolio Management (PPM) Center
- Organize users and assign them access grants according to the common tasks they perform in PPM Center

### Module 5: Personalizing Your Dashboard

- Set portlet display preferences
- Add, remove, and rearrange portlets in your dashboard
- Use preconfigured dashboard pages

### Module 6: Configuring Dashboard Modules

- Describe the options for delivering dashboard modules
- Configure shared and self-service modules

### Module 7: Designing Workflows

- Use workflow step sources to define the steps in a workflow
- Add transitions to link workflow steps
- Designate individuals and groups who can act on workflow steps
- Attach email notifications to workflow steps

### Module 8: Configuring Basic Workflows

- Create a workflow definition
- Use workflow step sources to define the steps in a workflow
- Add transitions to link workflow steps
- Designate individuals and groups who can act on workflow steps
- Attach email notifications to workflow steps

### Module 9: Configuring Decision Step Sources

- Recognize when to create new decision step sources
- Configure a decision step source
- Use workflow step timeouts
- Use polling decision steps
- Configure steps that allow for delegation

### Module 10: Controlling Data Integrity Using Validations

- Use the Validations Workbench to create validations
- Identify the different validation component types available for workflow step sources
- Identify the different validation component types available for data fields

### Module 11: Configuring Request Processes

- Describe the components of a request process
- Define the general tasks in building a request process
- Design and configure request workflows

### Module 12: Request Type and Request Header Type Overview

- Plan the data requirements of a request process
- Describe the relationship between a request type and its request header type
- Organize data fields across a request type and its request header type

### Module 13: Configuring Request Header Types

- Create new request header types
- Configure the attribute, default, storage, and security settings of data fields
- Modify standard request header type fields
- Add field groups to a request header type

### Module 14: Configuring Request Types

- Design and configure request types to contain data fields and business rules for collecting and storing request information
- Configure and add a table component into a request type
- Arrange the request type layout
- Restrict the use of a request type to a limited group of users
- Link a request type to its corresponding workflow
- Build different levels of help contents within a request type
- Define notifications to be automatically sent out on specific field changes



### **Module 15: Configuring Project Types**

- Create a project type
- Configure project policies

### **Module 16: Using Request Types Rules**

- Identify requirements for using request type rules
- Create and apply requests type rules

### **Module 17: Using Request Statuses and Status Dependencies**

- Create new request statuses
- Define the request statuses that a request type will use
- Assign request statuses to workflow steps
- Identify when status dependency rules are required
- Define status dependency rules to conditionally set data field properties

### **Module 18: Automating System Executions in Requests**

- Configure a request type to include command codes that run system executions and application routines
- Configure a workflow step source to invoke request type commands
- Set up a workflow to designate when request type commands will be executed within a process

### **Module 19: Integrating Parallel Request Processes**

- Recognize requirements for integrating parallel request processes
- Identify the options users have when creating request-request relationships
- Define security permissions that will allow users to create controlling relationships between requests
- Set up designated steps in the request workflow for spawning new requests

## **Related Courses**

- HPE PPM Advanced