COMPENDIUM CENTRUM EDUKACYJNE

Szkolenie: Micro Focus
PPM125 - Using Project and Portfolio Management

Cel szkolenia:

This four-day course is designed to familiarize you with the Micro Focus 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.

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 required skills 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

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.

Plan szkolenia:

- Course Overview
    - Describe the course objectives and the topics that are presented
    - Identify the logistics of this class, including the daily schedule, features of the virtual room, information about the eBooks, and the related courses
- Personalizing Your Dashboard

- 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

- Introduction to Project Management
  - 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 phase is supported in Project Management
  - Identify the roles that are involved in each phase of the Project Management Lifecycle

- Creating a Project
  - 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
  - Describe the process and track a project through its workflow

- Defining Resource Requirements
  - Describe the building blocks that PPM Center uses to model your organization's resource supply
  - Identify the information that you can find in resource profiles, calendars, and organization units, and use that information 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

- Building a Work Plan
  - 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

- Assigning Resources
  - 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

- Working with a Project's Financial

- Forecast costs and benefits for projects

- Capture actuals for projects and roll these costs up to programs Summary

- Monitor project costs against plan and approved budget

- Roll up actual labor costs to the project costs automatically, based on actual efforts that are reported from the work plan

- Configuring Work Plan Templates and Project Types
  - Create a work plan template
  - Create a project type
  - Configure project policies

- Managing Project Execution
  - 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 that is 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

- Scheduling the Work Plan Demand Management
  - Link a task to other tasks within the same work plan, to tasks from other work plans, and to requests that are processed through
  - 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
  - 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

- Analyzing Project Finances
  - 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

- Using Time Management
  - Create, update, and submit a new time sheet
  - Approve time sheets that are 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

- Using Program Management
  - 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

- Using Microsoft Project ntegration
  - 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

- Portfolio Key Concepts – Proposal
  - Describe an end-to-end portfolio management scenario from proposal through asset recognition
  - Submit a proposal, including basic information such as the business objectives and high-level requirements
  - Review and process a step in a previously submitted proposal

- Developing Proposal Staffing Requirements
  - 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

- Working with a Proposal Financial Summary
  - Develop a high-level justification for a proposal
  - Work with the Financial Summary of a proposa
  - 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

- Generating a Project from a Proposal and Creating a Portfolio
  - Take action to process a proposal through to closure
  - Create a new portfolio
  - Add projects to your portfolio
  - Add assets to your portfolio

- Analyzing a Portfolio

- Review Dashboard Portfolio 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 projects and assets to be evaluated
- Generate graphs that compare each scenario by cost, resource needs, and anticipated financial benefits

Wymagania:

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

Poziom trudności

Certyfikaty:

The participants will obtain certificates signed by Micro Focus (course completion).

Prowadzący:

Authorized Micro Focus Trainer.