HPE PPM350 – PPM Center 9.x for Advanced Training

Overview

Take your skills beyond the PPM Essentials course by learning how to configure advanced process logic and automation in your PPM implementation. Through discussions and hands-on exercises, you will learn to modularize processes into subworkflows, use condition checks to direct parallel workflow branches, automate system executions and database updates, and build custom portlets and reports. The class consists of approximately 50% lecture and 50% hands-on lab exercises. The hands-on lab exercises use version 9.3 of the software.
This course is designed for users who have taken HPE PPM120 Essentials and are ready to move to advanced topics.

Learning Method

You will receive expert instruction from a 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 HPE PPM Advanced manual. This manual is used throughout the course and proves a useful reference tool upon completion of the course.

Duration: 4 days

Who will benefit from this course?

This course is recommended for PPM Administrators/Configurers who have already taken the PPM 9.1 Essentials course and have basic field experience in implementing PPM processes.

Prerequisites for this course

- Experience with Windows operating systems
- Knowledge of relational databases and database terminology
- Attend PPM120 – PPM Center 9.x Essentials Training

What can you expect to gain from this course?
At the end of the course, you will be able to:

- Apply condition steps to direct parallel processes within a workflow
- Configure token and Structured Query Language (SQL) execution steps to define data-dependent routing rules
- Configure workflow step commands and Procedural Language (PL) execution steps to automate system executions at the workflow step level
- Build subworkflows and call them from within a parent workflow
- Execute special commands to update parameter fields, run shell scripts, and other system operations
- Customize Project and Portfolio Management (PPM) Center entities by configuring custom user data fields
- Design and configure custom portlets
- Set up and update the Rules Markup Language (RML) schema
- Execute a third-party reporting application to retrieve data from the RML schema
- Configure report types to define custom report data and formats

Course Content

Module 1: Course Overview

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

Module 2: Using Condition Steps

- Identify process requirements where the AND, OR, SYNC, FIRST LINE, and LAST LINE conditions are the most appropriate conditions to use
- Apply the AND and OR condition steps to evaluate the results of parallel workflow steps
- Apply the SYNC, FIRST LINE, and LAST LINE condition steps to evaluate the status of multiple package lines

Module 3: Defining Data-Dependent Routing Using Execution Steps

- Identify process requirements where token executions are appropriate to use
- Configure token execution steps to route a workflow process based on information available from packages, requests, and workflows
- Identify process requirements where automated workflow routing rules can be derived from information in a database
- Configure workflow steps to automatically look up information using Structured Query Language (SQL) query statements

Module 4: Storing and Retrieving Information Using Workflow Parameters

- Identify process requirements where workflow parameters are appropriate to use
- Execute a workflow parameter to capture the results of a workflow step

Module 5: Automating Executions within Workflow Steps

- Configure execution steps to call Procedural Language/Structured Query Language (PL/SQL) functions for modifying database tables
- Configure execution steps to run Project and Portfolio Management (PPM) special commands and command-line executions

Module 6: Creating Subworkflows

- Configure a new subworkflow
- Create a validation to define the results of a subworkflow
- Execute the Return from Subworkflow step to route a process from a subworkflow back to its parent workflow

Module 7: Using Subworkflows

- Call a subworkflow from another workflow
- Identify how user permissions should be set in subworkflows
- Define transitions to send process results to and from a subworkflow
- Track subworkflow activities in requests and package lines

Module 8: Using Advanced System Special Commands

- Create temporary variables
- Set the value of entity fields
- Execute interactive UNIX commands
- Invoke the command line on the Project and Portfolio Management (PPM) Center application server
- Encode and execute shell scripts
- Copy shell scripts between environments
- Edit the contents of files
- Add comments to the execution log

Module 9: Using Custom Special Commands

- Identify the requirements for creating custom special commands
- Configure custom special commands
- Define the parameter fields of custom special commands
- Build the command steps contained within a custom special command
- Call a custom special command from another entity

Module 10: Configuring Custom Entity Fields

- Identify requirements where user data fields can be used
- Configure user data fields to capture custom data
- Execute tokens to reference user data fields

Module 11: Configuring Context-Sensitive User Data

- Identify requirements where context-sensitive user data can be used
- Configure context-sensitive user data

Module 12: Configuring Portlet Data Sources

- Identify the requirements for a custom portlet, given a business scenario
- Configure a portlet data source to retrieve data from the database
- Define filter fields that allow end users to refine the result of a portlet query

Module 13: Configuring Portlet Definitions

- Identify the requirements for building custom portlet definitions
- Reference data sources and columns in a portlet definition
- Format a portlet definition that best displays the type of data that its data source provides
- Define portlet hyperlinks and drill-downs
- Organize preference filters that end users can use to personalize their portlets

Module 14: Using the RML

- Set up and update the Reporting Meta Layer (RML) schema
- Access data from the RML schema by using third-party applications

Module 15: Configuring Report Types

- Evaluate the options for creating custom reports in Project and Portfolio Management (PPM) Center
- Configure custom report types