

Portfolio Management 7.1 Configuration

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Overview

This course covers procedures for implementing Portfolio Mgmt processes and the best practices for using out-of-the-box solutions that the application provides.

Learning Method

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

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

Who will benefit from this course?

This course is intended for new administrators/configurers who are responsible for implementing and maintaining the Portfolio Mgmt processes in their organization.

Pre-Requisites for this course

Portfolio Management for Managers

What you can expect to gain from this course?

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

- Identify the business processes and practices that Portfolio Management supports.
- Identify the different entities involved in a Portfolio Management implementation.
- Write the basic design requirements for building a Portfolio Management process.
- Design and configure workflows to enforce and standardize Portfolio Management processes.
- Configure a request type to collect and store Portfolio Management data.
- Set up user accounts to define who has access to the application and what functionalities they have permission to use.
- Build custom portlets for monitoring and tracking the status of your initiatives.
- Publish and distribute Dashboard modules.
- Create custom report types to summarize information coming from proposals, projects, and assets.
- Configure advanced workflow steps to define datadependent routing rules and to automate system executions.
- Use condition steps to manage parallel workflow branches.
- Configure subworkflows to modularize processes.

Duration: 4 days**On Demand In:
MELBOURNE
SYDNEY
BRISBANE
CANBERRA**

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Course Content

DAY 1

Introduction to Portfolio Mgmt Configuration

Workflow Basics

- Basic Workflow Configuration
- Configuring Decision Step Sources
- Using out-of-the-box Portfolio Mgmt Workflows

DAY 2

Controlling Data Integrity Using Validations

Request Process Configurations

- Configuring Request Header
- Configuring Request Types
- Using Request Type Rules
- Setting Status Dependencies
- Using out-of-the-box Portfolio Mgmt Request Types and Request Headers
- Customizing Global Portfolio Mgmt Settings

DAY 3

Managing Users, Licenses, and Security

- Creating User Accounts and Licenses
- Creating Security Groups

Configuring Custom Portlets

- Creating Data Sources
- Creating Portlet Definitions

Configuring Dashboard Modules

- Creating Dashboard Pages
- Creating Dashboard Modules
- Publishing and Distributing Modules

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Custom Reporting

- Configuring Report Types
- Using the Reporting MetaLayer

DAY 4

Using Advanced Workflow Execution Steps

- Defining Data-Dependent Routing Rules
- Using Workflow Parameters
- Automating System Executions

Using Conditions Steps

Configuring Subworkflows

- Creating Subworkflows
- Using Subworkflows

Related Courses

ILT Portfolio management for managers
ILT Project management
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