



Version: 2016.1
by HEAT Software

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Portfolio and Project Management (PPM)

The Portfolio and Project Management module allows you to initiate, plan, and manage a variety of IT projects and other projects across your organization. You can assign tasks to resources in teams across the organization, manage and monitor budgets, and achieve specific goals within specified time frames in order to bring the project to completion.

Interoperability/Compatibility

PPM is a new feature pre-built into HEAT 2016.1 for all new customers. By using this HEAT App, this module is also applicable to customers who migrated to 2016.1 from a previous version of HEAT Service Management of 2014.3 or higher.

To verify if your HEAT Service Management has a metadata baseline of 2014.3 or higher, check if ITFM module is present. Log in to HEAT with the Administrator role, go to “More” and search for Master Budget Plan or Sub-Budget Plan. If there is a match, your HEAT Service Management has a metadata baseline of 2014.3 or higher and you can proceed with the install of the PPM Package.

Installing the PPM Package App

Before You Begin

Always back up your HEAT database.

- For HEAT Service Management on-premise implementations, you do this manually.
- For HEAT Service Management Cloud implementations, request that the HEAT Software Operations team run this for you.

Files Included with the PPM Package App

The PPM Package April 2016 app zip file, called **PPM Package**, includes the following package:

- ➔ **2016.1_PortfolioProjectManagement.MetadataPackage** – Installs the full functionality and updates the Portfolio and Project Management layout.

Installing the PPM Package App

Import **PPM Package** app package by doing the following:

1. Log into HEAT Service Management as an administrator.
2. Click **Configure Application** on the top right to go to the Configuration Console.
3. On the left, click **Build > HEAT Development Package**.
4. Click **Import Package** on the top right.
5. Select **Validate and apply if no errors** and click **Browse....**
6. Browse to the **2016.1_PortfolioProjectManagement.MetadataPackage** package and select it.

How to verify PPM was properly implemented

Please describe some basic test cases/scenario the admin can run through to verify that the App is successfully installed and configured or that an integration is configured and working. Please use the sample scenarios below to verify the installation is done successfully:

1. Login to HEAT using an account with Administrator role. Go to More and Enter Portfolio next to Search objects. This should bring up the Portfolio workspace (Note that there is no record presented in Portfolio yet)
2. Login to HEAT using an account with Administrator role. Go to More and Enter Employee. Open an Employee's profile. On the Roles tab, link the Project Manager role. Log out and log back in using this Employee and choose Project Manager role. This will bring up the Project Manager's home page consisting of three parts: Project Health, Project Assessment, Project Overview. (Note that there will no data presented in the Project Manager's home page yet)

Online Manual

For more information on how to use and configure HEAT PPM, please refer to the HEAT Online Help

You can access the full chapter directly by modifying the following link with your won tenant's web address

https://<YOUR_TENANT_URL>/help/admin/index.html#servicedesk/ppm/portfolio_project_mgmt.htm

