Primavera Portfolio Management Essentials (1Z0-544)
Exam Study Guide

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Objective & Audience

Objective

- Help you prepare to take the Primavera Portfolio Management Essentials (1Z0-544) exam by providing pointers to resources that you can use in your preparation.

Targeted Audience

- Implementation Consultants
- Technical Consultants
- Pre Sales Consultants
- Strong foundation and expertise in implementing Primavera Portfolio Management
- Up-to-date training and field experience are recommended
Exam Topics

The Primavera Portfolio Management Essentials (1Z0-544) exam consists of the 38 topics. Each topic has one or more objectives.

Exam Objectives

The exam objectives are defined by learner or practitioner level of knowledge:

- **Learner-level**: questions require the candidate to recall information to determine the correct answer.

  Example: Define the term network.

- **Practitioner-level**: questions require the candidate to derive the correct answer from the application of their knowledge, which can only be attained by extensive experience with the product.

  Example: The client requests xyz functionality, would you recommend a, b or c?
Training Options – OPN Boot Camps

• The Boot Camps are designed as a "jump start" training to enhance your skills by providing role-based training on industry-leading Oracle solutions and services.

• Primavera boot camps have been built to be concise, intensive, and real-time training. Experiencing the OPN Primavera boot camps will give partners a competitive advantage as they prepare to build powerful solutions for their own customer base.

• Primavera boot camps are instructor led training events. Look for schedules on OPN Boot Camps page.

• There is one OPN Boot Camp that supports this exam:

  Primavera Portfolio Management Implementation Boot Camp
Training Options – Guided Learning Paths

• In addition, there are Guided Learning Paths (GLPs) out on OPN Competency Center for Implementation Consultants and for Pre Sales Consultants.

• Note that Pre Sales GLP contains recordings that include positioning, target markets, cross sell up sell, industry specifics, product history and roadmap, etc.

• While these recordings are not required for Implementation Consultants, the Implementation Consultant may find that the recordings may be helpful when working within a specific industry contract.
Topic 1: Introduction to Portfolio Management

Objectives

- Describe the concept of a Portfolio Learner
- Describe the main steps in the Portfolio Management Process Learner
- Describe the Building Blocks of Primavera Portfolio Management Learner

Overview

- Portfolio – ongoing planning control
- PPM – planning and control mechanism

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #1

What is a Portfolio?

a) One item of interest

b) A collection of related items, which are grouped in order to manage and view performance of common business activities and goals.

c) A collection of graphs and views

d) A folder with modules
Topic 2: Fundamentals of Primavera Portfolio Management

Objectives

- Navigate Primavera Portfolio Management
  Practitioner
- Update Preferences
  Practitioner

Overview

- Modules - listed in the Navigation Bar at the top of the internet browser
- Modules are Investor Map, Scorecard, Workbook, Forms and Dashboard.
- To select - Item/Portfolio dropdown list

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #2

When logging into Primavera Portfolio Management the first screen that appears is either the last module viewed in the previous Primavera Portfolio Management session, or __________.

a) The System defined default module
b) A User’s default entry module
c) The last portfolio viewed
d) The highest priority portfolio
Topic 3: Introduction to Portfolio and Folder Structures

Objectives

- Navigate Portfolio Structures  
  Practitioner
- Use the Search feature  
  Practitioner

Overview

- Set up structure to support how investments will be managed
- Examples in PPM training database

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #3

Your Customer mentions that they have groups of portfolios that align to the same business objectives. They want to be able to group all of these portfolios together.

Which Portfolio Management functionality would address this requirement?

a) Calculated Portfolio  
b) Manual Portfolio  
c) **Super Portfolio**  
d) User Portfolio
Sample Question #4

Which tool bar is used for selecting the display module?

a) Black Menu Bar  
b) Tool Bar  
c) Title Bar  
d) Navigation Bar
Topic 4: Introduction to Forms

Objectives

- Identify Data Types in Forms
- Enter and Save data in a data-entry field
- Print and Export Forms

Level

- Practitioner
- Practitioner
- Practitioner

Overview

- Easy method of entering data
- Group related information to make data entry process logical
- Enter and organize all information regarding business activities
- Design to look like data entry screens

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #5

A form is used to collect _______.

a) Data On a list of items
b) Data On a portfolio of items
c) Data in reference to one item
d) Read only data
Sample Question #6

You have multiple users working in the same Form. Both Users save their work. However, when one of the Users comes back into Primavera Portfolio Management and pulls up the Form, they realize that their data did not save correctly.

What could be the reason for this problem?

a) If multiple users are modifying the same Item simultaneously, then the last person to ‘Save’ will have their data stored in the database.

b) The User did not select “Refresh” prior to exiting the application.

c) The User did not have the appropriate security to save the data in the Form.

d) The User navigated to the wrong tab and therefore is viewing the wrong data.
Topic 5: Introduction to Scorecards

Objectives

- Work with Scorecards and Portfolios
- Use Direct Update
- Print and Export Scorecards

Overview

- Customized view of selected Categories
- Analyze data, enter data
- Table format
- At a glance view of performance

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #7

Your Customer has built a very sophisticated set of Categories. They want to be able to update 10 of their highest priority categories using the same view of the data.

Identify the Portfolio Management functionality that will address this requirement.

a) Forms  
b) Dashboards  
c) Scorecards  
d) Indicators
Sample Question #8

Your Customer has navigated to Scorecard view. However, there is no data showing in the Scorecard.

What is the problem?

a) The User doesn’t have security access to this Scorecard

b) The User hasn’t refreshed their screen

c) The User hasn’t selected a Portfolio

d) The User hasn’t logged in properly
Topic 6: Processes Pane Basics

Objectives

- Create Links (Portfolio Links, Document Links, WEB links, Text Links)  Practitioner
- Edit My Processes  Practitioner

Overview

- Pre defined processes
- Create processes for links to Investor Maps, Scorecards, Workbooks, Forms, Dashboards

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #9

Identify two types of links that are possible in Primavera Portfolio Management.

a) Document Link
b) User Link
c) Application Link
d) Web Link
e) Data Link
Sample Question #10

Your Customer wants to leverage Processes functionality to create just in time training on each of the process steps.

What Primavera Portfolio Management functionality would address this requirement?

a) Document Link 
b) User Link 
c) Web Link 
d) Text Link
Topic 7: Introduction to Investor Maps

Objectives

- Customize the Investor Map  Practitioner
- Utilize What-If Mode functionality  Practitioner
- Record an answer to a request for information  Practitioner

Overview

- Strategic Center of PPM
- Display defined parameters in easy to understand map format
- Use to balance a portfolio
- Represent portfolio items in a “magic quadrant” format

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #11

Investor Maps have a 4 dimensional view which will allow analyzing data in a portfolio.

What are the 4 dimension of an Investor Map?

a) X, Y Swim lanes, What If Scenario
b) Goals, Gaps, Health, Cost
c) X, Y, Swim Lanes, What if Scenario
d) X, Y, Color By and Size By
Sample Question #12

Identify the function within the Investor Map that will allow What If scenarios.

a) Alternate Axes
b) Color By
c) Size By
d) Versions
Topic 8: Work with Investor Maps

Objectives

- Use Filters
- Find Specific Items

Overview

- Display items according to color to highlight performance issues
- Customize the display items displayed in the map
- Display Item statuses in Filter section of Map Tools

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #13

Your Customer wants to create an Investor Map that shows only the investments that are receiving the most funding.

Identify the Portfolio Management functionality that would help create this filter in the Investor Map.

a) Min and Max Checkboxes
b) Large and Small Checkboxes
c) Funded and Non Funded Checkboxes
d) Risk and Performance Checkboxes
Sample Question #14

If a scenario is not selected, Identify two item statuses that may be displayed in the Filter section of the Map Tools.

a) Open Items
b) Added Items
c) Closed Items
d) Removed Items
e) Cancelled Items
Topic 9: Introduction to Graphs and Dashboards

Objectives

- View a Dashboard  Practitioner
- Modify graph information  Practitioner

Overview

- Made up of many objects (graphs, tables, dynamic lists, deliverables, web portlets)
- Online Report to view, print, or e-mail

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #15

Your Customer wants to be able to create online, web based reports that are easily understood by Senior Executives.

Identify the Primavera Portfolio Management functionality that would address this requirement.

a) Dashboards
b) Indicators
c) Text Links
d) Web Links
Sample Question #16

Your Customer wants to do a look back of data for a specific portfolio.

Identify the Primavera Portfolio Management functionality that would address this requirement.

a) Save As
b) Data As Of
c) Set Date Range
d) Print report
Topic 10: Introduction to Workbooks

Objectives

| Access a Management Workbook | Practitioner |
| Navigate Management Workbook tabs | Practitioner |

Overview

- Display detailed information about an item or portfolio
- Seven tabs, plus a selected scorecard
- Scorecard displays categories, and information relating to item in Workbook

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #17

Identify two Project Management functions that can be managed using Workbooks.

a) Life Cycles
b) Phases
c) Resources
d) Work Breakdown Structure
e) Costs
Sample Question #18

You are working in a Workbook and come upon this screen. What are you doing?

a) Creating a Workflow
b) Creating an e-mail
c) Creating an Action item
d) Creating an Item
Topic 11: Create Scorecards

Objectives

- Create a new Scorecard  
  Level: Practitioner
- Apply Security Settings to the Scorecard  
  Level: Practitioner

Overview

- Tactical Center of Portfolios
- Core Management Console
- Table Format
- Comprehensive view of Performance

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #19

You have begun working with a new client who has been working hard over the past few months to establish a model for scoring their IT projects. They have developed a weighted scoring model that they would like to include in the Primavera Portfolio Management configuration. The goal is to have a composite score based on the inputs from key individuals.

What is the first key information you need to begin?

a) The scoring model (e.g., criteria/questions and weights)
b) Scale (e.g., 0-1, 0-50, 0-100)
c) Float (# dec places) or integer
d) # inputs
e) Rollup method for the inputs: average, min value, max value, sum, etc
f) Granularity of display (e.g., overall, by input, by scoring area)
g) Indicator color definition (e.g., red <50<yellow<75<green)
Sample Question #20

Identify the True statement regarding Scorecard security.

a) Security settings are by default inherited from the Home Folder

b) Security settings are by default inherited from the User that created it

c) Security settings are by default inherited from the Portfolio Hierarchy to which it belongs

d) Security settings are by default inherited from the Administrator that created it
Topic 12: Query-Based Portfolios

Objectives

• Create a Query Based Portfolio

Level

Practitioner

Overview

• Two Types of Portfolios – Manual, Query-Based
• Manual maintained by User or Admin
• Query Based groups items based on criteria

Training Options

• Primavera Portfolio Management Implementation Boot Camp
Sample Question #21

Your Customer mentions that they would like to set up portfolios in such a way that a set of criteria automatically updates the content within those portfolios.

Identify the Primavera Portfolio Management functionality that addresses this requirement.

a) Manual Portfolio
b) Query Based Portfolio
c) User Portfolio
d) Dynamic Portfolio
Sample Question #22

Your Customer wants to be able to show a summary roll up of values for a portfolio.

Identify the Primavera Portfolio Management functionality that addresses this requirement.

a) Non Calculating Portfolio
b) Calculating Portfolio
c) Calculated Fields
d) Dynamic Fields
Topic 13: Work with Investor Maps

Objectives

• Create an Investor Map

Level

Practitioner

Overview

• Strategic Center of PPM
• Decision Support Tool
• Create / Display parameters in graphical format

Training Options

• Primavera Portfolio Management Implementation Boot Camp
Sample Question #23

Investor Maps have a 4 dimensional view which will allow analyzing data in a portfolio.

What are the 4 dimension of an Investor Map?

a) X, Y Swim lanes, What If Scenario

b) Goals, Gaps, Health, Cost

c) X, Y, Swim Lanes, What if Scenario

d) X, Y, Color By and Size By
Sample Question #24

The Investor Maps works with Portfolios of Items or Portfolio of Portfolios.

What is the limit of items that will be displayed?

a) 100  
b) 500  
c) 1000  
d) No Limit
Topic 14: Create Tables

Objectives
• Create Tables

Level
Practitioner

Overview
• Building Bloc for Forms, Graphs and Dashboards
• Rapid Data Entry

Training Options
• Primavera Portfolio Management Implementation Boot Camp
Sample Question #25

You are working in Portfolio Management and come upon this screen. What are you doing?

a) Setting Table Properties
b) Setting up a Scorecard
c) Exporting data to Excel
d) Creating Categories
Sample Question #26

Identify two Portfolio Management modules where tables are used.

a) Processes
b) Scorecards
c) Portfolios
d) Workflows
e) Forms
Topic 15: Work with Graphs and Dashboards

Objectives

• Create Graphs
  Practitioner
• Create Dashboards
  Practitioner

Overview

• Dashboards – collections of graphics
• Graphical representation of portfolios
• Display trends, distributions, categories

Training Options

• Primavera Portfolio Management Implementation Boot Camp
Sample Question #27

How many graph types are available?

a) Three
b) Four
c) Five
d) None
Sample Question #28

In using Dashboards what is the limit of tabs used?

a) 4 tabs  
b) 5 tabs  
c) No limit  
d) 1 tab
Topic 16: Work with Workbooks

Objectives

- Customize Management Workbooks

Level

Practitioner

Overview

- Detailed view of business operations at item or portfolio level
- Provides scheduling information
- Track Events and Updates
- Track Activities and Deliverables

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #29

Identify the one of the management functions within Workbooks.

a) Life Cycles
b) Phases
c) Resources
d) Work Breakdown Structure
Sample Question #30

Your Customer mentions that they would like to be able to view lifecycle phases and detailed status such as who is responsible for what action, phase deliverables, which phases are completed, and the percentage of the current phase that is completed.

Identify the Portfolio Management functionality that addresses this requirement.

a) Workflows  
b) Processes  
c) Schedules  
d) Workbooks
## Topic 17: Work with Categories

<table>
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<th>Level</th>
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</thead>
<tbody>
<tr>
<td>• Create and maintain Categories</td>
<td>Practitioner</td>
</tr>
</tbody>
</table>

### Overview
- Business Performance or Technical Parameters
- Track and Evaluate Items, Portfolios, and Performance
- Can be indicators or values

### Training Options
- [Primavera Portfolio Management Implementation Boot Camp](#)
Sample Question #31

Fill in the blank: Cell Indicator function ____________.

a) Calculates the indicator using a JavaScript procedure.

b) Calculates the value from a different category's trend values in the same item or portfolio.

c) **Calculates the indicator, based on the value of the target category or another reference category.**
Sample Question #32

Identify the True statement regarding the creation of categories and indicators.

a)  When creating a category you must add the indicator immediately

b)  Indicators may be added at anytime.

c)  Creating a category does not include the indicator at all.

d)  Indicators are created on the scorecard not the category.
Topic 18: Work with Value Lists

Objectives
• Create and maintain Value Lists

Level
Practitioner

Overview
• Defined list of Values used to rate Categories

Training Options
• Primavera Portfolio Management Implementation Boot Camp
Sample Question #33

You are working in Primavera Portfolio Management and come upon the following screen. What are you doing?

a) Modifying Summary Value and Indicator
b) Modifying Calculated Category
c) Modifying Portfolio
d) Modifying Scorecard
Sample Question #34

“Quality: High, Medium, Low” are an example of
___________

a) Calculated Categories  
b) Indicators  
c) Items  
d) Value List
Topic 19: Work with Forms

Objectives

- Design Forms

Level

Practitioner

Overview

- Enter / report data for one specific item or portfolio at a time
- Data integrated into overall view of portfolio

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #35

__________ are designed for entering or reporting the data of one specific item or portfolio at a time.

a) Categories
b) Scorecards
c) Forms
d) Investor Maps
Sample Question #36

Identify two use cases for Forms.

a) Reporting
b) Ranking
c) Analysis
d) Collaboration
e) Leveling
Topic 20: Data Exchange between MS Excel and PPM

Objectives

- Copy and Paste from PPM to Excel  
  Level: Practitioner
- Copy and Paste from Excel to PPM  
  Level: Practitioner

Overview

- Copy / Paste from PPM to Excel, and vice versa

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #37

Working with the Copy/Paste data between Portfolios and Excel is available to everyone by setting the security at __________.

a) Category Level  
b) Scorecard Level  
c) Module Level  
d) Form level
Sample Question #38

The Copy and Paste functions allow data exchange between____________.

a) Query based portfolios and MS Word

b) Scorecards or Tables and MS Excel

c) Form Tabs and MS Word

d) Investor Maps and PDF Files
Topic 21: Work with Alerts

Objectives

- Create and maintain Categories

Overview

- Monitor System Events
- Dispatch e-mail messages
- Set of conditions that constitute an Event

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #39

Alert Permissions are set ___________.

a) At Module Level
b) At Portfolio Level
c) At User Level
d) At the Form Level
Sample Question #40

__________ monitor system events and can dispatch e-mail messages when triggered.

a) Reports
b) Alerts
c) Indicators
d) Workflows
Topic 22: Manage existing Folders, Portfolios, Objects and Items

Objectives

- Manage existing Folders, Portfolios, Objects and Items

Overview

- Modify Name, Description, Owner of a Folder
- Remove Folder - all objects within Folder removed
- Edit Items / Objects from Setup Module

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #41

Methods are functions used to retrieve data from Primavera Portfolio Management items. Select one of the methods used to get data from another item linked by a Dependency.

a) **getSupportsItems**

b) **getChildren**

c) **getSubItems**

d) **getPhases**
Sample Question #42

Because of the inherent functionality of rolling up category values of the items contained in a portfolio, each portfolio contained in the system has a performance impact. The number of items placed in a portfolio of items, and the number of portfolios placed in a portfolio of portfolios, is critical to performance. Large portfolios with have a much higher impact on performance than having smaller portfolios.

What is the best practice for setting up the portfolio structure

a) Set up any number of items in a portfolio and run them manually

b) Place the larger portfolio on a different server.

c) Create portfolios with a small amount of items and structure them within a super portfolio for rollup.

d) Restrict all portfolios to less than 500 items
Topic 23: Manage Users and User Groups

Objectives

- Manage Users and User Groups

Level

Practitioner

Overview

- Create Hierarchical Structure
- Create User Group Roles
- Assign to Folders, Portfolios, Objects, Items

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #43

How are the permissions set when adding users to Primavera Portfolio Management?

a) **By adding the new user to a User group**

b) By creating the new user in Primavera Portfolio Management

c) By adding the new user and setting the permissions individually.

d) By adding the new user to every portfolio, folder, and module.
Sample Question #44

Security for data is usually controlled by the item or portfolio permissions.

How would you secure a data element so only one user could update it?

a) Change the security on the item.

b) Change the security on the portfolio for which the data elements is displayed.

c) **Change the security on the category to allow the category to define data security.**

d) Change the security on the User Group to allow edit.
Topic 24: Configure Hierarchies and Security

Objectives

- Configure Hierarchies and Security

Level

Practitioner

Overview

- Folders, Portfolios, Objects organized in hierarchies by Default
- Inherit their security from Home Folder
- Eases maintenance

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #45

Assume you have a user group defined and a folder with a form in it.

Where do you define security to allow a member of the user group to select the form to view or update data in it?

a) User Group Permissions
b) Folder Permissions
c) Item Permissions
d) Portfolio Permissions
Sample Question #46

You've defined security on a portfolio to allow a user group to update the data for the entire portfolio, yet the members of the group can only update the projects for which they are manager.

Assuming you have defined the security for the portfolio correctly, what could explain why your security isn't working?

a) You have previously denied update access for the user group higher in the portfolio structure.

b) The portfolio is not the home location for the projects.

c) Members of the user group belong to other user groups which only allow read access.

d) Deny has been invoked

e) User doesn’t have the appropriate permission.
Objectives

- Create and Maintain My Processes  
  Practitioner

Overview

- Displays favorite sets of URLs
- Guided Workflows
- Add text objects – titles, explanatory text
- Workflows – links with descriptions

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #47

Your Customer wants to implement the discipline of portfolio management, but they are unsure where to begin.

What would be the first step that you would recommend?

a) Evaluate the new and existing projects
b) Manage Existing Projects
c) Continuously evaluate new project requests
d) Inventory All Existing Projects
Sample Question #48

Your Customer has completed an inventory of all Existing projects in flight. They want to get to the next level of maturity in implementing the discipline of portfolio management.

What would be the next step that you would recommend?

a) Evaluate the new and existing projects

b) Manage Existing Projects

c) Continuously evaluate new project requests

d) Inventory All Existing Projects
Topic 26: Using the Admin Window

Objectives

- Use the Admin Window to manage the Portfolio Management System
- Perform system administration tasks
- Define and configure access settings

Level

- Practitioner

Overview

- Provides up to the minute data about the PPM Server

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #49

Your users are complaining because response time seems to be very slow this morning. You open the Admin module and see that there are over 1000 actions in the pending action queue. There are actions in work and the number of functions completed changes every time you refresh your screen.

What action would you recommend?

a) Restart Portfolios
b) Clear the action queue
c) **Do nothing as yet, keep checking actions in queue**
d) Restart the Primavera Portfolio Management Services
Sample Question #50

Where would you look to see if a category function was causing problems?

a) Audit Log
b) Function Log
c) Setup
d) Data Entry Log
e) Primavera Portfolio Management Log
Topic 27: Use the PPM Console

Objectives

- View the PPM Version and Status  
  Practitioner
- Start and Stop the PPM and 
  Internet Information Server  
  Practitioner
- Manage PPM Databases  
  Practitioner

Overview

- Install PPM on a single computer (server), or scale out configuration
- Use the PPM Console for completing tasks

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #51

You are in the Primavera Portfolio Management Console. You are looking at the status of the PPM process. The status “Not Running” is showing.

What should you do next?

a) Check and run the “PPM Service” service.

b) Check the Internet Information Server (IIS) services.

c) Check and run the PPM Functions service.

d) Check the PPM Watchdog service.
Sample Question #52

__________ is a server utility that incorporates many of the server functions within a single interface.

a) Primavera Portfolio Management Console
b) Primavera Portfolio Management
c) Primavera P6 EPPM
d) Primavera Contract Management
# Topic 28: Use the PPM Menu and Server Utilities

## Objectives

<table>
<thead>
<tr>
<th>Objective</th>
<th>Level</th>
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</thead>
<tbody>
<tr>
<td>Determine which tasks are performed on only front-end, only back-end or on all the servers</td>
<td>Practitioner</td>
</tr>
<tr>
<td>Perform PPM Maintenance tasks</td>
<td>Practitioner</td>
</tr>
<tr>
<td>Perform Server Utilities tasks</td>
<td>Practitioner</td>
</tr>
</tbody>
</table>

## Overview

- Run maintenance tasks on a pre-assigned schedule
- Reschedule to suit organization’s needs
- Define data / time for tasks
- Define how often task will run

## Training Options

- [Primavera Portfolio Management Implementation Boot Camp](#)
Sample Question #53

You are working in Primavera Portfolio Management and come upon this screen. What are you doing?

a) Scheduling PPM Maintenance Tasks
b) Scheduling PPM Reports
c) Scheduling PPM Processes
d) Scheduling in P6 EPPM
Sample Question #54

Your new Primavera Portfolio Management Administrator is scheduling tasks in a global PPM instance. He has scheduled maintenance tasks every Monday at 12:00 GMT.

Do you see a problem with this plan?

a) No, because GMT is 5 hours behind the US. The tasks will be complete before US audience launches the application.

b) Yes, because most of Europe will be affected by compromised application performance during the maintenance tasks.

c) No, because maintenance tasks are not a significant drain on performance.

d) Yes, because the data within the database will experience conflicts and overwrites during maintenance tasks.
Topic 29: Import and Export PPM Packages

Objectives

- Explain Packages concept
- Perform import and export tasks

Overview

- Use Export and Import Package Wizard to move system objects between databases

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #55

You are working in Primavera Portfolio Management and come upon this screen. What are you doing?

a) Modifying Portfolios
b) Modifying Content for Export Package
c) Modifying Security for Content
d) Modifying access to Content
Sample Question #56

Identify the True statement regarding importing a package.

a) You can redefine most of the import options that were defined in the export process

b) You can modify content and add additional objects to the package.

c) You can add new Users to the package

d) You can reassign ownership of the package after the import
Topic 30: Create and Maintain Functions

Objectives

- Create and Maintain Functions

Level

Practitioner

Overview

- Horizontal Function: Calculated based on values in other categories for item
- Vertical Function: Calculated based on values in child items
- Advanced: Support the use of JavaScript to perform complex logic
- Functions triggered when one or more of target categories change value, or if category imported in package

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #57

Select the correct reserved word in Primavera Portfolio Management that may be used in Advanced calculations.

a) Today
b) Tomorrow
c) Yesterday
d) Time and date
Sample Question #58

When creating an over-time function requires you to enter source and time period information that is used to calculate the cell value.

How many operations can be selected from the displayed options?

a) Only one operation can be selected from the displayed options
b) Two operations
c) No limit
d) 4 operations
Topic 31: Advanced Functions

Objectives

• Use the Advanced Functions Editor to create and edit functions

Level

Practitioner

Overview

• Additional Options unavailable in basic horizontal, vertical, indicator, over time formulas
• Require use of syntax, JavaScript procedure

Training Options

• Primavera Portfolio Management Implementation Boot Camp
Sample Question #59

Advanced Functions are used in Primavera Portfolio Management for calculating cell values with more powerful capabilities.

How are the Advanced Function created?

a) Created in Java Script
b) Written in C+
c) Written in word documents and linked
d) Advance functions calculations are included in the software.
Sample Question #60

Throughout Advanced Functions you need to use the Test function.

Identify the best practice for use of the Test function.

a) Wait until data is entered to use the test function for it will not work without data in the categories.

b) Use the Test Function creating test data, if possible, before moving on, because the test will catch logic as well as syntax errors.

c) No testing is necessary it will work regardless of the advance functions conditions

d) Wait until the testing is planned for the full configuration.
Topic 32: Basics of JavaScript

Objectives

- Use the Advanced Function Editor to create advanced functions

Level

- Practitioner

Overview

- Use JavaScript to create Advanced Functions
- Perform different types of operations

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #61

JavaScript is a case-sensitive language and there are special characters used to separate statements.

They are:

a) "::"

b) ";;"

c) "/*/"

d) "..."
Sample Question #62

You are declaring a compound statement using JavaScript.

How is this done?

a) Use "{" and "}"

b) Use "//" to start the statement

c) Start the statement with "*/" and end the statement with "*/"

d) Use ";" to separate the statements
# Topic 33: Introduction to Workflows

**Objectives**

- Describe key functional components of Portfolio Management Workflows  
  **Level**  
  Learner

**Overview**

- Basic Workflow – Start and End Steps, plus one task  
- Manual or Automatic Tasks

**Training Options**

- [Primavera Portfolio Management Implementation Boot Camp](#)
Sample Question #63

You are working in Portfolio Management and come upon this screen. What are you looking at?

- a) Swim Lane Editor
- b) Step Definitions
- c) Life Cycle Editor
- d) Diagram Editor
Sample Question #64

Identify two task types that are implemented automatically by the system.

a) Manual Decision Step
b) Parallel Decision Step
c) Category-based Decision Step
d) Tasks Step
Topic 34: Workflow Diagram Editor

Objectives

- Access the Workflow Wizard | Practitioner
- Enter General Workflow Information | Practitioner
- Select Instance Defaults | Practitioner
- Select a Manager | Practitioner

Overview

- Design workflow’s steps and tasks

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #65

You are “cleaning up” your Portfolio Management workflows. You know that there are workflows that are no longer used or needed.

Identify the best practice for this purpose.

a) Delete the Workflow
b) Disable all User Access to the Workflow
c) Disable the Workflow
d) Delete the Workflow Users
Sample Question #66

You are working in Portfolio Management and come upon this screen. What are you doing?

a) Entering General Workflow Information
b) Defining Workflow Security
c) Defining Workflow Ownership
d) Selecting Instance Defaults
Topic 35: Design a Workflow (Steps and Tasks)

Objectives
- Design Workflow Steps and Tasks

Level
- Practitioner

Overview
- Task step – a step with one or more tasks
- Associate Step and Task tabs to define properties
- Complete Step tab once for each step
- Define multiple tasks in the Task Tab

Training Options
- Primavera Portfolio Management Implementation Boot Camp
Sample Question #67

You are creating a new workflow Task. You have selected Module Type: Workbook.

Identify two other pieces of information that must be selected.

a) Data As Of
b) Owner
c) Scorecard
d) Tab
e) Description
Sample Question #68

You are working in Portfolio Management and come upon this screen. Identify this screen.

a) Workflow Diagram
b) Task Dialog Box
c) Action Item Dialog Box
d) Item Security Dialog Box
Topic 36: Design a Workflow (Insert Decision Steps)

Objectives

- Insert Decision Steps

Level

- Practitioner

Overview

- Manual Decision Step – decision made manually by assigned Performer
- Category Decision step – decision made automatically based on conditions

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #69

A _______ has two to five parallel tracks of Task steps defined, all of which must be completed for the workflow to continue.

a) Manual Decision Step
b) Automated Decision Step
c) System Defined Decision Step
d) Parallel Decision Step
Sample Question #70

Your Customer wants to create a workflow where several of the decision steps include a question with two to five possible answers (options).

Which Decision Step would you recommend?

a) Manual Decision Step
b) Category Based Decision Step
c) System Defined Decision Step
d) Parallel Decision Step
Topic 37: Verify the Workflow

Objectives

- Assign Permissions for the Workflow
- Test a Workflow

Overview

- Determine if workflow has problems that keep it from running properly
- Identify errors
- View Warnings

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #71

You are creating a workflow in Portfolio Management. The workflow is still disabled as you aren’t sure that it is working properly.

Where should you go to see if there are any errors in the workflow?

a) Step Dialog Box
b) Diagram Dialog Box
c) Verify Dialog Box
d) PPM Console
Sample Question #72

You are working in Portfolio Management and come upon this screen. Identify this screen.

a) Verify Dialog Box
b) Diagram Dialog Box
c) Step Dialog Box
d) PPM Console
Topic 38: Manage Workflows

Objectives

- View Workflows in the Guide Pane
- Stop and Start Workflows
- Edit a Workflow that is Running

Level

Practitioner

Overview

- Start Automatically – triggered by alert
- Start Manually
- Use Workflow Instances to review, stop, archive, delete, report on workflow instances

Training Options

- Primavera Portfolio Management Implementation Boot Camp
Sample Question #73

You are looking to start a workflow. You go to the Start Workflow Dialog Box, but cannot locate the workflow you want to start.

What is the problem?

a) You do not have workflow security for the specific workflow

b) You do not have user access to workflow functionality in PPM

c) This is an automated workflow that cannot be started from the Start Workflow Dialog Box

d) The workflow has been disabled and therefore cannot be accessed
Sample Question #74

You are working in Portfolio Management and come upon this screen. Identify the screen.

a) Start Workflow Dialog Box
b) Stop Workflow Dialog Box
c) Workflow Instance Defaults
d) Verity Workflow Dialog Box
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