

MS Office Project Portfolio Server – 3 days

This course gives an overview of MS Project Portfolio Server to help organizations setup their portfolio server environment to identify, analyze and select the project portfolios that best align with their business strategy. In this course, you will learn how to successfully configure and use the Microsoft Project Portfolio Server to evaluate projects, programs, and applications. (21 PDU classroom hours)

Course Topics

Install Microsoft Portfolio Server software

Learn how to create databases and install software and apply appropriate service packs.

Organization Management

Learn about organizational structures and how to set up of the organization structure properly for reporting on various business units, divisions, or branches an organization.

Portfolio Management

Learn the value of custom portfolios and how to set them up to report on groups of projects that cross organizational boundaries.

Users & Security Groups

Define user groups for a collection of user rights that are used to control the users' access rights in Portfolio Manager and add new users to the Portfolio Manager.

Financial Management

Define the cost centers to be used across organizations and entities to enable users to break cost data down by specific categories (such as business expense versus IT expense). Associate the defined cost centers with the appropriate levels within the organization hierarchy.

Workflow Management

Create different workflows for projects to follow based on the value of the Project Class attribute. Define governance gates, define processes, define notifications, and create lifecycles.

Survey Management

Define surveys with lists of questions and possible answers for display on the Risk tab for each project to calculate a risk score based on the answers chosen for each question.

Driver Management

Create business drivers and their impact choices. Associate the business drivers with the appropriate levels within the organization hierarchy. Setup the pairwise comparison of these business drivers based on management input on the ranking.

Attribute and Indicator Management

Create custom attributes to collect and display data that is specific to an organization and color-coded indicators for status reporting and associate them with the appropriate organizations. These status indicators used in the Dashboard reporting module can include both manual and automatic based on a formula.

Resource Management

Define generic resource types and to associate them to necessary organizations. Choose which columns will be shown in the Project Resource Tracking.

Project Server Gateway Settings

Set the bi-directional gateway between the Builder module and Microsoft Project Server 2007 to allow users to perform some administrative actions such as a mass import or mass export of projects. Define the settings between the Microsoft Project Server 2007 Resource Pool and the Resource Pool in Portfolio Server. Define import and export mapping templates to link attributes in Portfolio Server with enterprise fields in Microsoft Project Server 2007.

Project Snapshot Report Management

Setup the snapshot reporting process for projects. Create custom dashboards, filters, e-mail templates, and store additional documents for each project, program, portfolio, or application.

Filter Management

Define filters for selecting subsets of projects, resource types, or portfolios, for analysis during portfolio optimization sessions.