

**Microsoft Office Project Portfolio Server for Portfolio and Project Managers – 2 days**

The goal of this course is to provide Portfolio Managers and Project Managers an overview of MS Project Portfolio Server to identify, analyze and select the project portfolios that best align with their business strategy. In this course, you will learn how to successfully use the builder module to enter data, use the dashboard module to view project status and the optimizer module to perform analysis on which projects best fit the corporate strategies. (14 PDU classroom hours)

**Course Topics****BUILDER MODULE**

## Managing Projects

- Creating, Viewing and Editing a Project
- Checking a Project In/Out
- Navigating between tabs within a project
- Project Document Management
- Workflow Management
- Change Requests

## Managing Programs

- Viewing a Program
- Adding/Removing Projects in a Program

## Managing Portfolios

- Viewing a Custom Portfolio
- Portfolio Tabs

## Managing a Resource Pool

- Original Resource Availability
- Resource Requirements
- Actual Resource Availability

**DASHBOARD MODULE**

## Creating a Custom Scorecard View

- Selecting a Scorecard View
- Creating and Modifying a Scorecard View

## Snapshots

- Creating a Snapshot
- Managing Snapshots in Batch
- Creating and Deleting Individual Snapshots
- Reviewing Previous Snapshots

**OPTIMIZER MODULE**

## Opening the Optimizer Module

- Selecting Optimizer Options
- Creating a New Analysis
- Opening an Existing Analysis/Solution
- Exporting General Data

## Optimization Process Steps

- Pair-wise Comparison
- Selecting the Optimal Portfolio
- Optimizing Distributions
- The Efficient Frontier

## Decision Dashboard

- Creating a Scenario
- The Decision Dashboard Toolbar

## Using the Optimizer for Application Portfolios

- Analyzing Applications for Business Importance
- Application Architectural Fit
- Application Business Alignment
- Three-Step Prioritization
- Current State Alignment
- Process Contribution and Process Inventory
- Process Application Impact Choices
- Business Functions

## Visualization Options

- List View Option
- Data View Option
- Relations View