Microsoft Portfolio Server 2007

Course Summary

Description

The goal of this course is to provide portfolio and program managers the knowledge and skills necessary to effectively to build, analyze and report on projects using Microsoft Portfolio Server 2007.

Topics

- Project Portfolio Management
- Builder Module
- Optimizer Module
- Dashboard Module

Audience

This course is designed for project management professionals with experience in managing portfolios of projects and aligning them to the business priorities.

Prerequisites

Before attending this course, students must be familiar with the fundamentals of Project Management. A working knowledge of Microsoft Project Professional is also beneficial.

Duration

Two days

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... to Your Success!"

Microsoft Portfolio Server 2007

Course Outline

I. Project Portfolio Management Methodology
- A. Project Portfolio Management Methodology
- B. Hierarchy Structures

II. Builder Module
- A. Managing Projects
  1. Creating, Viewing and Editing a Project
  2. Checking a Project In/Out
  3. Navigating between tabs within a project
  4. Project Document Management
  5. Workflow Management
  6. Alert Subscription
  7. Change Requests
- B. Managing Programs
  1. Creating, Viewing and Editing a Program
  2. Adding/Removing Projects in a Program
- C. Managing Applications
  1. Creating, Viewing and Editing an Application
  2. Application Tabs
  3. Document Management
  4. Application Information Links
  5. Application Associations
  6. Associating Applications to Dependent Applications
- D. Managing Portfolios
  1. Creating, Viewing and Editing a Custom Portfolio
  2. Portfolio Tabs
  3. Managing a Resource Pool
  4. Original Resource Availability
  5. Resource Requirements
  6. Actual Resource Availability

III. Optimizer Module
- A. Opening the Optimizer Module
  1. Selecting Optimizer Options
  2. Creating a New Analysis
  3. Opening an Existing Analysis/Solution
  4. Exporting General Data
- B. Optimization Process Steps
  1. Pair-wise Comparison
  2. Selecting the Optimal Portfolio
  3. Optimizing Distributions
  4. The Efficient Frontier
- C. Decision Dashboard
  1. Creating a Scenario
  2. The Decision Dashboard Toolbar
- D. Using the Optimizer for Application Portfolios
  1. Analyzing Applications for Business Importance
  2. Application Architectural Fit
  3. Application Business Alignment
  4. Three-Step Prioritization
  5. Current State Alignment
  6. Process Contribution and Process Inventory
  7. Process Application Impact Choices
  8. Business Functions
- E. Chart Wizard
  1. Using the Chart Wizard
  2. Management of Existing Charts
  3. Chart Display
- F. Visualization Options
- G. List View Option
  1. Data View Option
  2. Relations View
- H. Filter Management
  1. Defining Filters
  2. Managing Filters

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Course Outline (cont'd)

IV. Dashboard Module

A. Creating a Custom Scorecard View
   1. Configuring a Scorecard View
   2. Selecting a Scorecard View
   3. Creating and Modifying a Scorecard View
   4. Visualizing a Scorecard View

B. Snapshots
   1. Creating a Snapshot
   2. Managing Snapshots in Batch
   3. Creating and Deleting Individual Snapshots
   4. Reviewing Previous Snapshots

C. Reporting
   1. Using Existing Reports
   2. Adding New Reports
   3. Report Templates
   4. Organizations and Portfolios Templates

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