

PPM 15.4: Portfolio Management 200

Course Summary

Description

Without being able to align investments with corporate goals, an organization may not be able to deliver the highest return from its valuable resources. Organizational initiatives require a portfolio of project-related investment objects to make them a reality.

The Project & Portfolio Manager 15.4 (PPM) Portfolio Management module enables you to establish the viability of an initiative before you schedule investment objects. It also enables you to analyze current initiative portfolios and make informed decisions about the efficient application of investment objects and the maintenance of project-related cost and revenue goals.

This course will show you how to create, maintain, and analyze the true cost and benefit of organizational initiatives using the performance analysis and scorecard features of PPM. This training is based on PPM classic interface.

Objectives

At the end of this course, students will be able to:

- Create and maintain portfolios, which enables you to create a detailed inventory of all your investments.
- Add investments to define the content of a portfolio, which enables you to monitor and analyze grouped investments.
- Analyze a portfolio, which helps you make decisions about adding to or removing investments from the portfolio and ensuring that resources are optimally allocated to the best investment combinations.
- Create and maintain scenarios, which helps you plan the allocation of your resources across investments, decide on the correct set of investments for your portfolio, and adjust your portfolio budget.

Topics

- Build Portfolios
- Analyze Portfolios
- Manage Portfolio Plans

Audience

This course is intended for those users who want hands-on training in the portfolio management areas of project management.

Prerequisites

Students should have completed CRPM 15.4: Project and Investment Management 200 before taking this course.

Duration

Two days

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Course Outline

- I. *Build Portfolios*
 - A. Describe Portfolio Management
 - B. Create portfolios
 - C. Add investments to a portfolio
 - D. Create portfolio targets

- II. *Analyze Portfolios*
 - A. Review the Waterlines page
 - B. Review the PMO-Portfolio Investment Dashboard portlets
 - C. Review the Portfolio Dashboard pages

- III. *Manage Portfolio Plans*
 - A. Create portfolio plans
 - B. Implement plans