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Viewing a Project in Portfolio Server 2007

Last time we finished up creating our project. Now let's look at our Project from our My Scorecard view. First, we need to expand our Human Resources section so that we can get to our Project. To expand a section, simply click on the plus sign next to the name.

Name	ID	Workflow	Status	IT Budget 2007	IT E
Corporate				93,517,510	
Finance				8,231,450	
Human Resources				7,356,070	
Information Technology				31,542,360	
International				11,335,100	
Marketing				13,475,280	
Operations				22,015,310	

Once we've expanded our section, we see the list of projects to choose from. Once you find the project that you want to view, click on the name of the project to view it. In our case, we're going to click on the Employee Suggestion Database that we created.



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Portfolio Selector

Name	ID	Workflow	Status	IT Budget 2007
Corporate				93,517,510
Finance				8,231,450
Human Resources				7,356,070
Employee Complaint Database Evaluation	HR-007	Major Project	Portfolio Selection	852,370
Employee Morale Survey	HR-004	Major Project	Propose Idea	938,670
Employee Retention Tracking	HR-005	Major Project	Complete Request	1,005,130
Employee Suggestion Database	001	Non Major Project	Request Project	0
Employee Training Seminar Planning	HR-008	Major Project	Full Business Case	779,200
Online Recruiting Vendor Evaluation	HR-006	Major Project	Complete Request	881,250
Payroll System Upgrade	HR-001	Non Major Project	Summary Business Case	866,390
Resume Database Design	HR-002	Major Project	Complete Request	1,056,630
Skills Tracking Database	HR-003	Non Major Project	Complete Request	976,430
Information Technology				31,542,360
International				11,335,100
Marketing				13,475,280
Operations				22,015,310

Cross View View All (including linked entities) Add View Edit Delete

Once the project opens, the default view will be the Project Info tab. You will notice that there are several different tabs at the top of the page. You can click on each of these tabs and view the information under that tab. You can also click on the right triangle to scroll to the right for more tabs, or you can click on the diamond in the middle to access a list of tabs that you can click on the name to access. Another important thing to note is that we are in the view (or read only) mode. You can tell whether you're in the view only or edit mode by looking in the left hand corner of the screen (noted with a red circle).



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Microsoft Office Project Portfolio Server 2007

Builder / View Project Employee Suggestion Database

Builder Optimizer Dashboard About Log Out

Settings My Scorecard Resource Pool Preferences Reports

Project Info Additional Information Budget Cost Benefit Estimates Strategic Impact

Change Request Alert Subscription Workflow Project Association

Name	Employee Suggestion Database		
Project Class	Non Major Project	Workflow	Request Project
Project ID	001	Creation Date	6/22/2009
Project Type	Development	Areas Impacted	Finance, Production, Sales & Marketing, Product Development, IT, HR
Type of Funding	Gated	Funding for Project planned?	No funding planned

Multiple tabs

Schedule

Start Date	6/29/2009	End Date	9/29/2009
Start No Earlier Than	6/29/2009	Finish No Later Than	12/29/2009
Benefits Start	6/29/2009		

Prioritization And Selection

Strategic Value	Project NPV	
Risk Level	Manual Rating	2_Should Have

Executive Summary

Project Objectives

Business Need

Additional Information Budget Cost Benefit Estimates Strategic Impact Status Project Reports Document Management

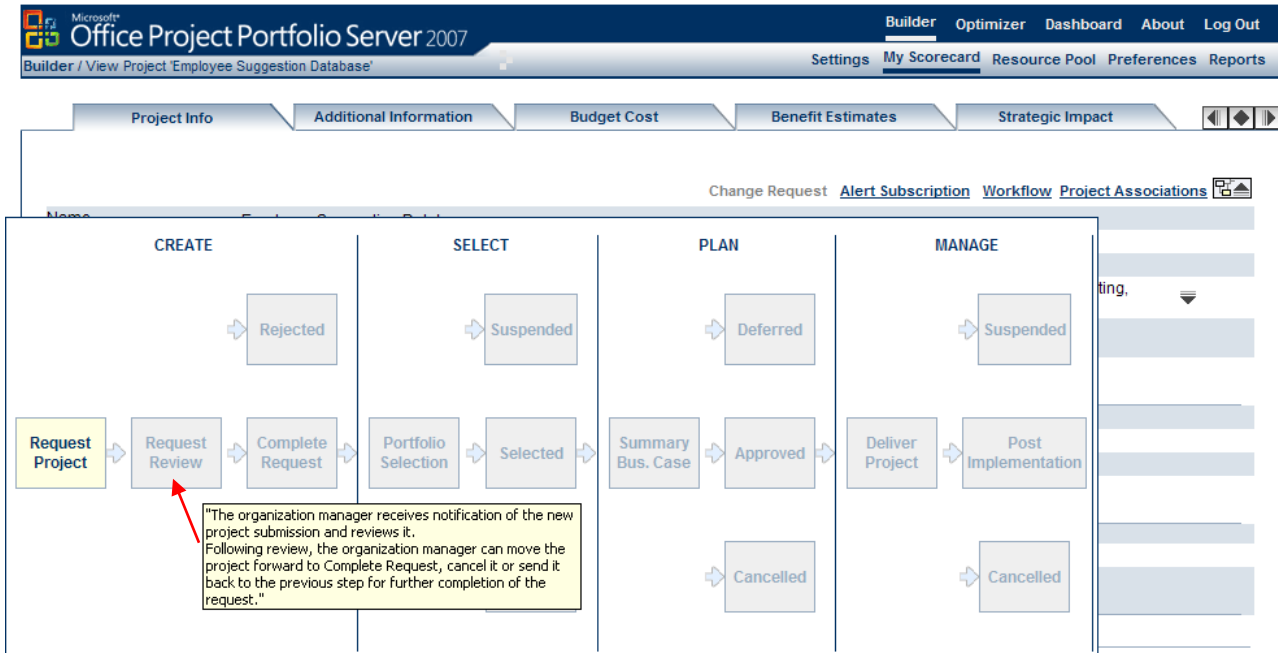
There is another handy icon that you can use in this view mode. I'll give you another screenshot because this icon was hidden in the screenshot above. It's the icon located to the right of "Project Associations". I have circled it in red. Clicking on this icon, a window pops up showing you a graphical representation of where this project is in the workflow process. You'll notice that "Request Project" is the only box with bold writing in it. This notes where we currently are in the process.



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Another thing I like about this graphical representation is that you can hover over any of the boxes and a description box will pop up. So you are never left to guess just exactly what “Request Review” means! To close the workflow representation, simply click on the icon again and the box will disappear.





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You will notice to the left of the “handy icon”, are some other links. We won’t do screen shots of each option, but I do want to tell you about each one. You can see that the Change Request option is grayed out. Our project hasn’t even gotten past the Request stage yet, so even if we made changes it wouldn’t impact anything right now. If we were farther along, then a change request would have to be submitted.

Change Request: Use this link to request additional resources and/or funds for projects that have already been approved.

Alert Subscription: Use this link to subscribe to automatic e-mail messages.

Workflow: You can access workflow information from this link. You do have to have the proper user rights set up by the Portfolio Administrator in order to access this.

Project Associations: Use this link to view/edit the different associations of the project to an organization, portfolio, program or application.

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Project Info Additional Information Budget Cost Benefit Estimates Strategic Impact

Change Request Alert Subscription Workflow Project Associations

Name	Employee Suggestion Database		
Project Class	Non Major Project	Workflow	Request Project
Project ID	001	Creation Date	8/22/2009
Project Type	Development	Areas Impacted	Finance, Production, Sales & Marketing, Product Development, IT, HR
Type of Funding	Gated	Funding for Project planned?	No funding planned
Schedule			
Start Date	8/29/2009	End Date	9/29/2009
Start No Earlier Than	8/29/2009	Finish No Later Than	12/29/2009
Benefits Start	8/29/2009		
Prioritization And Selection			
Strategic Value		Project NPV	
Risk Level	Low	Manual Rating	2_Should Have
Executive Summary			
Project Objectives			
Business Need			



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That's all for this blog on Portfolio Server. Tune in next time when we talk about Editing a Project in Portfolio Server 2007!