

# Microsoft Project Portfolio Management

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**Class Overview:** This class is designed to teach you how to use Microsoft Project to efficiently manage tasks and resources over multiple projects. Students will also learn how to monitor project vital signs across multiple projects as well as customize fields to enhance data analysis.

**Class Duration:** This class will last 1 day.

**Selected Audience:** This class has been designed for managers who want to use Microsoft Project to help them manage multiple projects.

**Prerequisite Skills:** This class assumes you have taken **Microsoft Project Tracking & Reporting**.

**Objectives:** The following areas will be covered in this class:

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|-------------------------|---|--|
| Resource Pools          | } | <ul style="list-style-type: none"> <li>• use, create, and share resource pools</li> <li>• open files that share resource pools</li> <li>• assign resources from projects linked to a resource pool</li> </ul>  |
| Master Projects         | } | <ul style="list-style-type: none"> <li>• understand and create a master project</li> <li>• insert and delete individual projects in the master project</li> <li>• view and modify task information in the master project</li> <li>• create inter-project relationships using a master project</li> <li>• save changes to a master project and inserted projects</li> <li>• explore resource pool and master project views and reports</li> <li>• organize projects into appropriate portfolio windows</li> </ul> |
| Portfolio Analysis      | } | <ul style="list-style-type: none"> <li>• analyze the portfolio's milestone hit rate and critical path status</li> <li>• identify high risk project areas of the portfolio and adjust schedule accordingly</li> <li>• assess cost performance to date and for completion</li> <li>• create customized fields to enhance data analysis</li> </ul>  |
| <b>Project Workshop</b> | } | <ul style="list-style-type: none"> <li>• <b>assistance from instructor on personal projects</b></li> </ul>   |