



Creating a New Project in Portfolio Server 2007 – Part 2

This document is the second one about Creating a new Project, where in Part 1 we began the process. Below is a screen shot of the entire Project Info tab that we will have to fill out. I wanted you to see the entire screen, but we are going to focus on a few fields. I know this seems like a lot of information, but in order for Portfolio Server to be able to tell us which projects will be best suited for your company's business objectives, we need this information for it to make good choices.

Project Info			
Name *	<input type="text"/>		
Project Class *	<input type="text"/>	Workflow	N/A
Project ID	<input type="text"/>	Creation Date	6/19/2009
Project Type	<input type="text"/>	Areas Impacted *	No items selected
Type of Funding	<input type="text"/>	Funding for Project planned?	<input type="text"/>
Schedule			
Start Date *	<input type="text"/>	End Date *	<input type="text"/>
Start No Earlier Than	<input type="text"/>	Finish No Later Than	<input type="text"/>
Benefits Start	<input type="text"/>		
Prioritization And Selection			
Strategic Value	<input type="text"/>	Project NPV	<input type="text"/>
Risk Level	<input type="text"/>	Manual Rating	<input type="text"/>
Executive Summary			
Project Objectives			
<input type="text"/>			
Business Need			
<input type="text"/>			
Stakeholders			
Project Requester *	No items selected	Executive Sponsor *	No items selected
Project Manager	No items selected	Team Members	No items selected
Financial Summary			
Total One Time Cost Budget	0	One Time Cost Budget IT	0
One Time Cost Budget Operations	0	One Time Cost Budget Business	0
Recurring Cost Increases	0	Total Capital Budget	0



Let's start with the first series of information. First, you'll notice that there are some fields that have an asterisk beside them. These fields are required fields and must contain information before the project can be saved. Keep in mind that these are Portfolio Server's default fields. You may want some specific fields of your own and that's fine. You will just need to have your Portfolio Server Administrator add the fields for you.

Project Info			
Name *	<input type="text"/>	Workflow	N/A
Project Class *	<input type="text"/>	Creation Date	6/19/2009
Project ID	<input type="text"/>	Areas Impacted *	No items selected
Project Type	<input type="text"/>	Funding for Project planned?	<input type="text"/>
Type of Funding	<input type="text"/>		

I have added a name called "Employee Suggestion Database". This will be the name of our project. Next, I clicked on the down arrow next to Project Class. There are two default project classes, Major Project and Non Major Project. This is going to be a non major project. We won't get into the workflow piece now, so we'll just leave ours N/A.

Name *	<input type="text" value="Employee Suggestion Database"/>	Workflow	N/A
Project Class *	<input type="text"/>	Creation Date	7/28/2009
Project ID	<input type="text"/>	Areas Impacted *	No items selected
Project Type	<input type="text"/>	Funding for Project planned?	<input type="text"/>
Type of Funding	<input type="text"/>		

Next we'll look at the Project ID field. I have manually typed 0001 into this field, but you can set Portfolio Server up so that it will automatically assign a Project ID to each new project. You will notice that Portfolio Server automatically puts the date in the Creation Date field. There are several default project types, Regulatory, Business Growth, Infrastructure, Development, Enhancement, and Internal Efficiencies. I'm going to choose Enhancement for our current project.

Name *	Employee Suggestion Database		
Project Class *	Non Major Project	Workflow	N/A
Project ID	0001	Creation Date	7/28/2009
Project Type		Areas Impacted *	No items selected
Type of Funding		Funding for Project planned?	
<div style="border: 1px solid black; padding: 2px;"> ▶ Schedule </div>			
Start Date *		End Date *	
Start No Earlier Than		Finish No Later Than	

Now it's time to select our areas impacted. Click on the black triangle next to the "No items selected" section of the Areas Impacted. This will open the drop down menu with the default Areas Impacted list. You can select multiple areas, but in our case, we'll only click in the box next to HR.

Name *	Employee Suggestion Database		
Project Class *		Workflow	N/A
Project ID	0001	Creation Date	7/28/2009
Project Type		Areas Impacted *	No items selected
Type of Funding		Funding for Project planned?	
<div style="border: 1px solid black; padding: 2px;"> ▶ Schedule </div>			
Start Date *		End Date *	
Start No Earlier Than		Finish No Later Than	
Benefits Start			

Finance
 Production
 Sales & Marketing
 Product Development
 IT
 Service Delivery
 HR

Our next two fields have to do with funding. There are two types of default funding choices to choose from, Gated and Full. Click on the drop down arrow to get your types of funding list. For our example we're going to choose Full.

Name *	Employee Suggestion Database		
Project Class *	Non Major Project	Workflow	N/A
Project ID	0001	Creation Date	7/28/2009
Project Type	Enhancement	Areas Impacted *	HR
Type of Funding	Full	Funding for Project planned?	
<div style="border: 1px solid black; padding: 2px;"> ▶ Schedule </div>			
Start Date *		End Date *	



And finally, we are going to select whether or not the funding for our project was planned. Click on the drop down arrow to get the Funding for Project Planned list. There are three default options to choose from, Fully Funded, Partially Funded, or No Funding. Since we're in the land of make believe here, of course our project is fully funded!

Name *	Employee Suggestion Database		
Project Class *	Non Major Project	Workflow	N/A
Project ID	0001	Creation Date	7/28/2009
Project Type	Enhancement	Areas Impacted *	HR
Type of Funding	Full	Funding for Project planned?	<div style="border: 1px solid black; padding: 2px;"><div style="border: 1px solid black; padding: 2px;">Yes, fully funded</div><div style="border: 1px solid black; padding: 2px;">Partially funded</div><div style="border: 1px solid black; padding: 2px;">No funding planned</div></div>
Schedule			
Start Date *		End Date *	

We've completed the first part to the information needed for our new project. Tune in next time to learn about the Schedule information we need to fill out next!