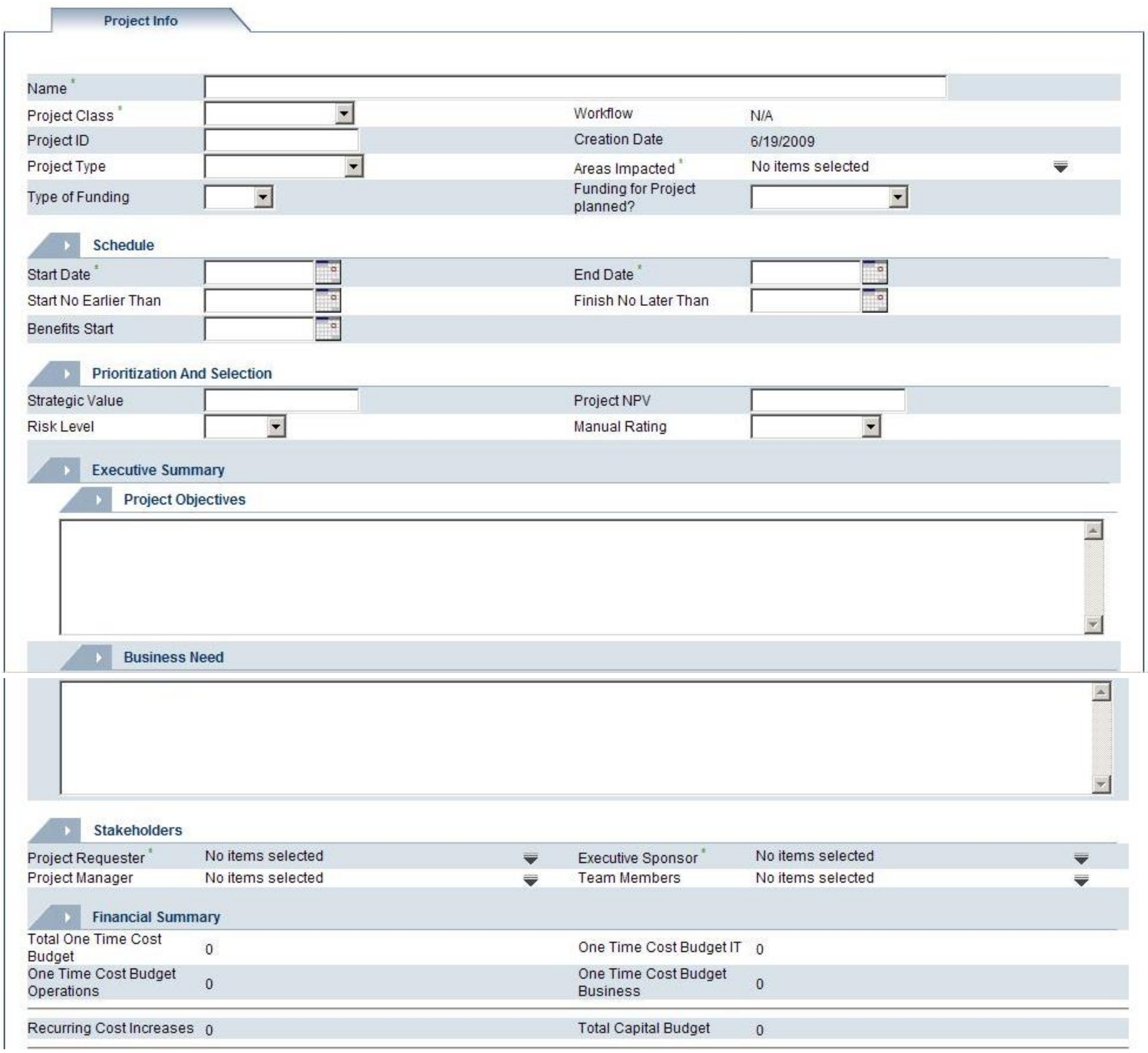
Creating a New Project in Portfolio Server 2007 – Part 2

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.



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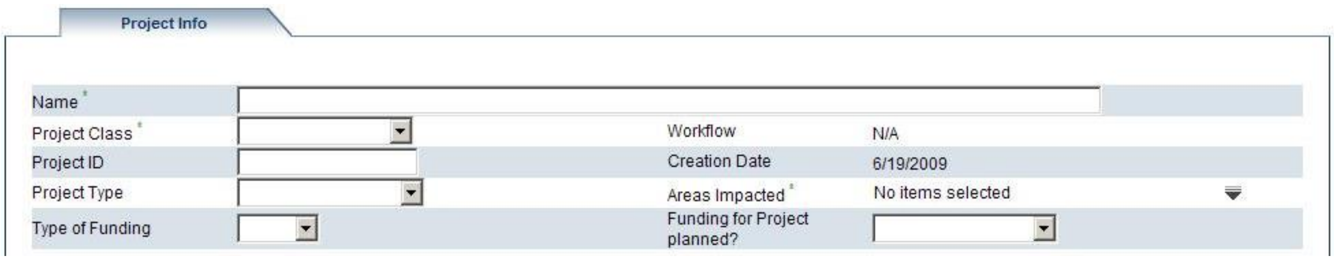
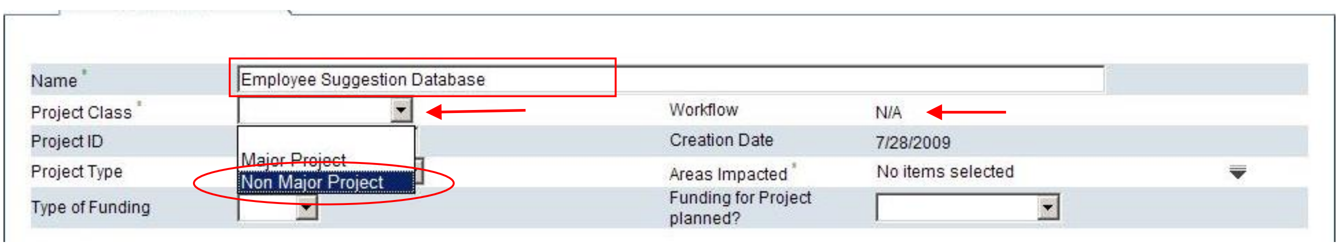
Let’s start with the first series of information. First, you’ll notice that there are some fields that have an asterisk beside them. These fields are required fields and must contain information before the project can be saved. Keep in mind that these are Portfolio Server’s default fields. You may want 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.



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.



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.

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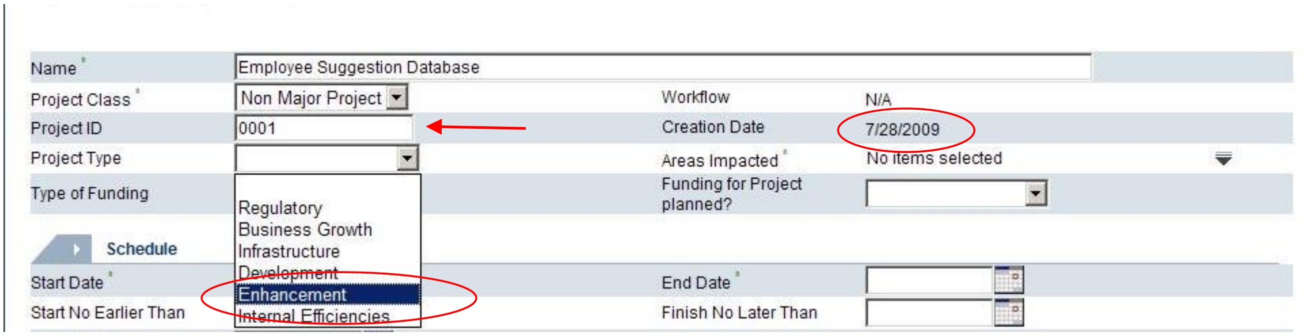
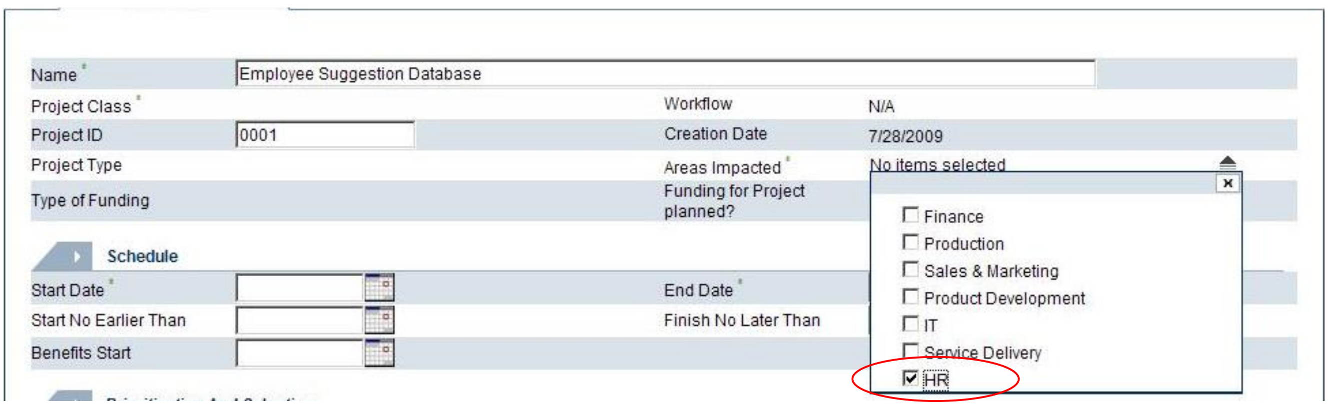
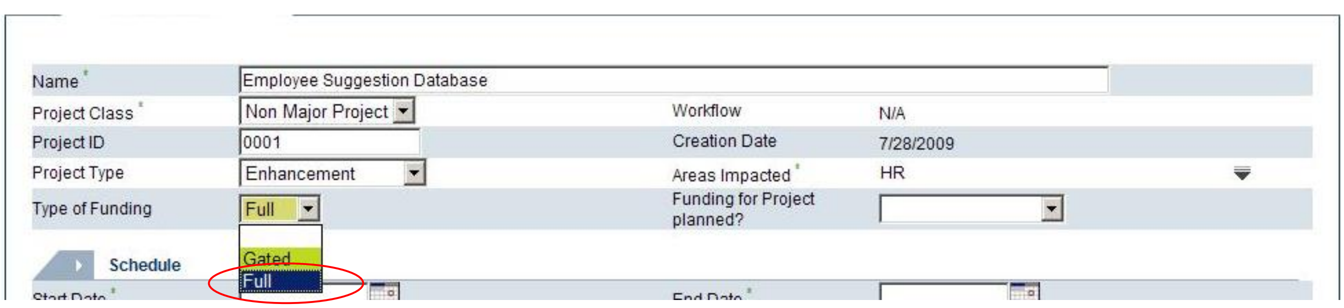


Now it's time to select our areas impacted. Click on the black triangle next to the "No items selected" section of the Areas Impacted. This will open the drop down menu with the default Areas Impacted list. You can select multiple areas, but in our case, we'll only click in the box next to HR.



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.



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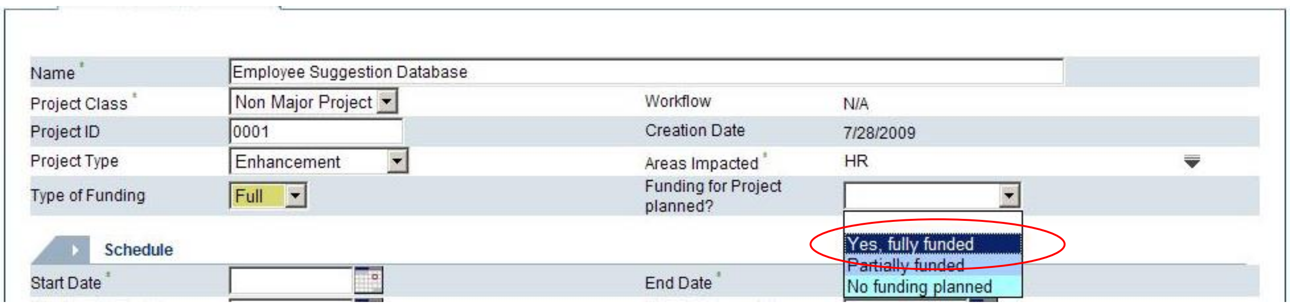
And finally, we are going to select whether or not the funding for our project was planned. Click on the drop down arrow to get the Funding for Project Planned list. There are three default options to choose from, Fully Funded, Partially Funded, or No Funding. Since we're in the land of make believe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



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!

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