APG

Armstrong Process Group, Inc.
Professional Education Division

IBM Rational Portfolio Manager Fundamentals

Objectives

- Review principles behind enterprise portfolio, program, project management
- Review key capabilities used by project managers in IBM® Rational® Portfolio Manager
- Discuss how to create projects
- Discuss how to manage resources and schedules
- Discuss how to manage work assignments and project actuals (time and expenses)
- Discuss how to report project status
- Discuss how to close projects
- Review integration with other products
  - Rational Unified Process
  - Rational Method Composer
  - Rational ProjectConsole

Description

IBM Rational Portfolio Manager Fundamentals describes how an experienced project manager would use IBM Rational Portfolio Manager (RPM) to manage software development projects. Beginning with a review of the principles behind enterprise portfolio/program/project management and the RPM architecture and user interface, the course then describes how to create a new project. Importing existing plans from Microsoft Project plans is discussed along with other project initiation information (dependencies, constraints, estimates). Then the course describes how to assign and level resources and baseline and publish the project schedule. Students then learn how to assign work to individuals, enter time and expenses, manage changes to the project, and attach documents. Customizing the portfolio dashboard is discussed along with different reporting capabilities including pivot tables, investment maps and scorecard reports. Then students learn how to close projects. The course finishes with an overview of the capabilities of RPM when integrated with other IBM Rational tools including Rational Method Composer and Rational ProjectConsole.

Course Outline (Modules and Topics)

- Portfolio Management Overview
  - EPMO principles
  - RPM overview
  - RPM architecture and user interface
  - Users and security
- Setup Project
  - Work breakdown structure
  - Importing Microsoft Project plans
  - Dependencies and constraints
  - Project data and estimates
  - Adding projects to portfolio
- Manage Resources
  - Assigning resources
  - Leveling schedules
  - Baselining and publishing schedules
- Manage Assignments
  - Assigning work
  - Entering time and expenses
  - RPM workflow
  - Change requests
  - Attachments and documents
- Report Project Status
  - Customizing portfolio dashboard
  - Creating pivot tables
  - Creating investment maps
  - Creating standard reports
  - Creating scorecard reports
- Close Project
- Integrate Portfolio
  - IBM Rational Unified Process (RUP)
  - IBM Rational Method Composer (RMC)
  - IBM Rational ProjectConsole

Duration	Course #
2 days	01-0608

Audience

- IT managers
- Portfolio managers
- Project managers
- Resource managers
- Team leads

Prerequisites

- Project management fundamentals (training and/or experience), PMBOK
- Business and IT management experience

Continuing education

- Iterative Development Fundamentals
- Rational Unified Process Fundamentals

Classroom requirements

- IBM Rational Portfolio Manager v7.0
  - Server with middleware and database
  - Networked client machines
- Microsoft Internet Explorer v6.0+
- Microsoft Project 2002/2003

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