

### **Course 109 – Portfolio Management in P6 Web**

Provides hands-on training on managing portfolios in P6 Web. Topics include creating a portfolio, viewing and analyzing portfolio performance, creating portfolio views, capacity planning, waterline analysis, and managing issues and risks. A case study at the end of the day reinforces new skills and functionality.

**Course level:** Basic

**Targeted roles:** Program managers, project managers, executives

**Course length:** 1 day

**Prerequisite:** Course 101 recommended but not required

#### **Professional Development and Continuing Education Units:**

Earns 6.5 PDUs and .65 CEUs

PMI Program Number – 109 (pending)

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#### **Learning Outcomes:**

##### **Introduction to Portfolios**

- Select a portfolio
- Create a portfolio favorite
- Create a portfolio manually
- Manage portfolios
- Set preferences

##### **Viewing Portfolio Performance**

- Set Global Preferences
- Review performance thresholds
- View data in the Executive Summary tab
- View data in the Performance Status tab

##### **Viewing Portfolio Information**

- View return on investment data
- View data in the Gantt Chart
- Customize the Gantt Chart
- Assign a Notebook topic and write a Notebook topic description

### **Analyzing Portfolios**

- Customize the Portfolio Analysis tab
- Edit a portfolio view
- Create a portfolio view
- View waterline analysis
- Create a scenario
- View Capacity Planning tab

### **Managing Issues and Risks**

- View issues and issue details
- Group, sort, and filter issue data
- View issues in chart form
- Create a risk

### **Case Study: Managing Portfolios**



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