



EPM Partners

Unleash Your Potential



our services

Portfolio Server (PPM) in a Box

What is PPM in a Box?

PPM in a Box is a package of consulting services (both business and technical) that guides you to a successful PPM implementation using Microsoft Portfolio Server. It includes a proven EPM implementation method that facilitates the configuration of typical PPM functions to your specific requirements.

How much does it cost?

PPM in a Box has a fixed price of \$58,000 (plus GST).

How long will it take?

PPM in a Box is a fixed-price and fixed-scope package, however the duration of the engagement is largely dependant on the client providing the information required, making required decisions and supplying software and hardware. From our experience PPM in a Box usually takes two-three months to implement.

What are the business benefits?

PPM in a Box delivers immediate business benefits including the ability to:

- Automate and enforce governance processes.
- Capture all investments within a central repository.
- Objectively prioritise business strategies.
- Effectively prioritise and evaluate competing investments.
- Optimise budgets and resources and align selected investments with business strategies.
- Measure and track portfolio performance.

Who should invest in PPM in a Box?

Any business interested in a top-down portfolio management solution that supports their organisation by identifying, selecting and delivering a set of investments that best align with their business strategy.

Also, any organisation requiring a portfolio management tool that integrates with Microsoft Project Server to provide an end-to-end solution.



EPM Partners is a unique, end-to-end, service provider supporting the complete Microsoft Enterprise Project Management Solution



Portfolio Server (PPM) in a Box

What does PPM in a Box include?

We provide the following services as part of the PPM in a Box package:

- Conducting planning workshops to gather and analyse your requirements and demonstrate configuration options.
- Installing Microsoft Portfolio Server in two environments—production and test.
- Designing and documenting the PPM solution including a detailed usage workflow.
- Configuring the PPM solution to align with your business requirements including:
 - Creating and configuring system objects metadata and properties for portfolios, programmes, projects, strategic drivers, etc.
 - Creating and configuring an enterprise resource pool including integration with Project Server if required.
 - Creating and configuring programmes, portfolios and project online views and dashboards (including traffic light KPIs) with the ability to export to Excel.
 - Creating and configuring projects review, approval and selection workflows with email notification and security settings.
 - Creating and configuring cost estimate templates and structure.
 - Creating and configuring project benefits structure (financial and/or non financial).
 - Creating and configuring organisational project impact assessment criteria (i.e. business drivers or strategic objectives).
 - Creating and configuring projects selection and portfolio optimisation constraints (such as budget and resources availability).
 - Configuring a portfolio server security model to meet your access level requirements and configured workflow.
 - Configuring risks and issues registers.
 - Configuring integration with SharePoint .
 - Creating and configuring programmes, portfolios and project reports (reports can include any type of configured data such as change requests, cost, actual data, etc).
- Providing role-based user training.
- Providing administrator training.

contact us

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