
EPK-Suite™ 5.x Overview & EPK-Suite™ 4.x/5.x Resource Planning

Overall Workshop Description

This one day session is designed to provide a solid overview of EPK-Suite™ 5.x features and also drill deep into the Resource Planning functionality provided in versions 4.X and 5.X. The first half of the day will focus on new and changed features of EPK-Suite™. Changes in administration, program office administration, resource configuration, the interface to Microsoft® Project Professional/Standard and the new capabilities in the use of Work Items will be highlighted. The new scheduling options will presented will provide a solid foundation for selection of the appropriate tool to meet your scheduling requirements. This will provide those who are responsible for migration or adoption of EPK-Suite™ with the understanding necessary for planning. The second half of the day will provide a deep dive into resource planning with EPK-Suite™. Resource planning functionality in EPK-Suite™ is very powerful and can be complex. This session will provide a detailed walkthrough of resource planning fundamentals and use of the built in negotiation with sample processes. The integration of resource planning in Portfolio Center and Capacity Center will be demonstrated and guidelines provided in effective configuration. Emphasis will be on EPK-Suite™ 5.1 but the content is also applicable to EPK-Suite 4.X.

Target Audience

Project Office managers and administrators using EPK-Suite™ or designers and business analysts responsible for upgrading or implementing EPK-Suite™.

Learning Objectives

The major learning objectives for the workshop include:

- 1. Identify the new and enhanced features and functions of EPK-Suite™ 5.x**
- 2. Learn the capability and application of Work Item based scheduling.**
- 3. Utilize EPK-Suite™ as a key element of tactical and strategic portfolio management with integration to such tools as ExpertChoice and RAS.**
- 4. Utilize the Microsoft Project Professional integration with EPK-Suite™ 5. x.**
- 5. Understand the tools available within Microsoft Project what about Standard to effectively utilize both EPK-Suite™ and Project.**
- 6. Understand the resource configuration using EPK-Suite™ 5.1x.**
- 7. Identify the role of the administration and the program/project office administration functions.**
- 8. Understand the relationship of business processes to the resource planning functionality within EPK-Suite™.**
- 9. Utilize role based resource planning negotiation within EPK-Suite™.**
- 10. Integrate resource planning with Portfolio and Capacity Center views.**
- 11. Utilize enhanced capabilities in finding candidates.**
- 12. Understand the configuration and use of availability and capacity scenarios.**

Benefits of Workshop

1. Understand the differences between EPK-Suite™ 4.3 and 5. x.
2. Identify the impact of migrating to the new version of EPK-Suite based on current features, functions, and processes utilized in your EPM solution.
3. Identify the new features that will satisfy requirements not met with the current version or the currently implemented features.
4. Understand the impact of integration changes with Project Server and Project Professional 2003/2007.
5. Discuss with other users/potential users the application of EPK-Suite™ 5.1 in solving common business issues.

Agenda

Morning

1. EPK-Suite™ 5.x Overview with New Features
2. Configuration, Administration, and Program/Project Office Administration
3. Project Scheduling using Work Items & Microsoft Project Professional
4. Utilizing EPK-Suite™ 5.x to support both Strategic & Tactical Project Portfolio Management Requirements

Afternoon

5. A deep dive into Resource Planning
6. Utilizing Resource planning data within Portfolio Center & Capacity Center
7. Customization options and examples
8. Roadmap for implementing EPK-Suite™ 5.x

Prerequisites

Familiarity with EPK-Suite™ or other Enterprise Project Management / Portfolio Management or Resource Planning software is very helpful for this session but not required.

Materials Provided

Course Notebook

Length of Workshop

One Day

Registration

The course will be held on Tuesday, April 8, 9:00 a.m. – 4:00 p.m. at the Jupiter Beach Resort, <http://www.jupiterbeachresort.com>. This class is presented by Forté Systems on the day before the EPK User Group meeting.

*Fees: \$299 Early Registration through March 11, 2008
\$399 after March 11, 2008.*

Registration is available online at:

<https://www.fortesys.com/EPK5xClass.htm>

For questions please email Jim Peters, jpeters@fortesys.com

