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# 2.02.14 Portfolio

The mask **portfolio** allows the administration of project portfolio management for any selected projects and qualitative characteristics. Project portfolio management is the planning, management and control of selected projects of an organization.

The basis of the project portfolio management are the compilations of projects. In this mask the projects can be compiled and the axes for the evaluations can be predefined.

The screenshot shows the 'Portfolio 0006' application interface. It features a menu bar with 'Dokument', 'Bearbeiten', 'Ansicht', and 'Aktionen'. Below the menu are tabs for 'Stammblatt' and 'Sonstiges'. The main content is divided into three sections: 'Basisinformationen', 'Projekte', and 'Programme'.

**Basisinformationen**

Name: 0006      Status: aktiv  
Bezeichnung: Portfolio Vorstandsreport  
Zeitraum: von [ ] bis [ ]

**Projekte**

	Projekt-Nr.	Bezeichnung	Status	Projektmanager	Plan-Beginn	Plan-Ende
<input type="checkbox"/>	1 001	Einführung EPM	aktiv	002 Schaub Peter	13.08.2019	04.10.2019
<input type="checkbox"/>	2 004	Einführung Bankensteuerung	aktiv	002 Schaub Peter	13.08.2019	26.10.2019
<input type="checkbox"/>	3 011	Optimierung Risikomanagement	passiv	002 Schaub Peter	20.08.2019	02.12.2019
<input type="checkbox"/>	4 045	Implementierung bei CS	aktiv	008 Jansen Olivia	18.09.2019	10.01.2020

**Programme**

	Nr.	Bezeichnung	Status	Verantwortlicher	von	bis
<input type="checkbox"/>	1 00001	Entwicklung "System A"	aktiv	004 Schmidt Norbert	01.06.2019	31.12.2020

The mask contains the following elements:

- **Name:** This alphabetical field uniquely identifies the portfolio in the system.
- **Description:** These fields identify the portfolio (long text, 255 characters).
- **Time Span (from/to):** The start and end of portfolio management is entered in these fields.
- **Standard X, Standard Y and Standard Z:** These values allow you to define the standard axes for the portfolio for portfolio evaluation. The key figures for the axes are, for example, planned effort, actual effort, planned costs, actual costs, planned revenues, quotation value, invoiced amount, probability and percentage of completion.
- **Standard Color:** This value allows you to define the category for the color of the bubbles in the bubble chart (portfolio evaluation). These categories include project category, priority and project status.
- **Programs:** A portfolio can contain one or more programs, which can be managed here.
- **Projects:** In this multiple selection, any number of projects can be combined to form a portfolio.

The document class contains the following actions:

- **Portfolio Chart:** This action directly opens the portfolio chart for the selected portfolio.

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Last update: **2020/02/24 16:12**

