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## 2.02.15 Portfolio

The portfolio menu allows for administration of the project portfolio-management for any selected projects and qualitative characteristics. Project portfolio-management means planning, regulating and controlling selected projects of an organisation.

The basis of the project portfolio-management is the combining of projects. In this menu projects can be combined and the axes for the analysis can be predefined.

**Tip:** For more on this subject see chapter [4.2.10 Portfoliomanagement](#).

**Name** Management II

**Beschreibung** Optimierung, interne und externe Entwicklungs- und Bauprojekte

**Zeitspanne** von 01.07.2009 bis 31.12.2010

**Achsen** Standard-X Plandauer Standard-Y Ist-Zeit Standard-Z Plan-Umsatz

**Standard-Farbe** Status

**Programme**

|   | Nummer | Bezeichnung                             |
|---|--------|-----------------------------------------|
| 1 | 00001  | Prozessoptimierung (Prozesse, PM, Fibu) |

**Projekte**

|   | Nummer | Bezeichnung                                                    | Status        |
|---|--------|----------------------------------------------------------------|---------------|
| 1 | 38     | Optimierung Entwicklung Wohnbaugebiete                         | aktiv         |
| 2 | 39     | Entwicklung des Wohnbaugebietes Oberhaide                      | abgeschlossen |
| 3 | 40     | Erschliessungsträgerschaft zur Entwicklung des Wohnbaugebietes | abgeschlossen |
| 4 | 41     | Einführung Finanzbuchhaltung                                   | aktiv         |
| 5 | 46     | Erschliessungsträgerschaft zur Entwicklung des Wohnbaugebietes | abgeschlossen |

The menu consists of the following elements:

On the “Master Data” tab:

- **Name:** This alphabetic field specifies the portfolio uniquely in the system.
- **Description:** This field specifies the portfolio (long text, 255 characters).
- **Standard-X, Standard-Y und Standard-Z:** These values allow the definition of the standard axes for the portfolio for the portfolio analysis. The key figures (Kennzahl) for the axes are for example, planned time/effort, actual time/effort, planned costs, actual costs, planned revenue, offer value, invoice amount, probability and degree of completion.
- **Standard Color:** This value allows defining the category for the color of the bubbles in the bubble-chart (portfolio analysis). These categories are, for example, the project category, priority and the project status.
- **Projects:** In this selection box any amount of projects can be combined to a portfolio.

The document type consists of the following actions:

- **Portfolio Chart:** With this action a portfolio analysis for the selected portfolio can directly be opened.

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