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2.02.15 Portfolio

The **Portfolio** form 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 form 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 form 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 defining the standard axes for the portfolio for the portfolio analysis. The key figures (Kennzahlen) 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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