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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](#).

The screenshot shows the 'Portfolio Management II' application window. At the top, there's a toolbar with icons for file operations like New, Open, Save, Print, and a magnifying glass. Below the toolbar, there are several input fields and dropdown menus:

- 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

Below these settings, there are two sections:

- Programme:** A list box showing one item: 1 0001 Prozessoptimierung (Prozesse, PM, Fibu)
- Projekte:** A table listing five projects with their numbers, descriptions, and status. The table has columns: Nummer, Bezeichnung, and Status. The status column uses color coding: aktiv (yellow), abgeschlossen (green).

Nummer	Bezeichnung	Status
1	Optimierung Entwicklung Wohnbaugebiete	aktiv
2	Entwicklung des Wohnbaugebietes Oberhaide	abgeschlossen
3	Erschließungsträgerschaft zur Entwicklung des Wohnbaugebietes	abgeschlossen
4	Einführung Finanzbuchhaltung	aktiv
5	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 porfolio 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 catagory for the color of the bubbles in the bubble-chart (portfolio analysis). These catagories are, for example, the project catagory, 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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