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2.02.15 Portfolio

The **Portfolio** form applies to the administration of the project portfolio-management for any selected project and qualitative characteristics, i.e. planning, regulating and controlling selected projects of an organisation.

The basis of the project portfolio-management is compiling projects. In this form, projects can be compiled 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. It features a menu bar with options like 'Dokument', 'Bearbeiten', 'Ansicht', 'Rückverweise', and 'Aktionen'. The main form area contains several sections:

- Name:** A text field containing 'Management II'.
- Beschreibung:** A text area containing 'Optimierung, interne und externe Entwicklungs- und Bauprojekte'.
- Zeitspanne:** Two date pickers showing 'von 01.07.2009' and 'bis 31.12.2010'.
- Achsen:** Three dropdown menus for 'Standard-X' (Plandauer), 'Standard-Y' (Ist-Zeit), and 'Standard-Z' (Plan-Umsatz).
- Standard-Farbe:** A dropdown menu set to 'Status'.
- Programme:** A table with columns 'Nummer' and 'Bezeichnung'. It contains one entry: '00001 Prozessoptimierung (Prozesse, PM, Fibu)'.
- Projekte:** A table with columns 'Nummer', 'Bezeichnung', and 'Status'. It lists five projects:

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 and Standard-Z:** These values allow defining the standard axes for the portfolio for the portfolio analysis. The key figures 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:** Using this action a portfolio analysis for the selected portfolio can directly be opened.

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