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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](#).

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

Portfolio development

Document Edit View Back references Actions

Master data Misc

Name development

DescriptiveText development projects and interfaces

Timespan From 22.09.2009 To 30.10.2009

DefaultX PlannedCost

DefaultY BilledValue

DefaultZ PlannedTurnover

DefaultColor Category

Programs No entries

Projects

Number	Description	Status
1 4	Customizing crm system	Passive

Issue

Meeting

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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