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2.02.14 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 development' form. The 'Master data' tab is active, displaying various configuration fields. The 'Name' field is set to 'development'. The 'DescriptiveText' field contains 'development projects and interfaces'. The 'Timespan' is defined from '22.09.2009' to '30.10.2009'. The 'DefaultX', 'DefaultY', and 'DefaultZ' fields are set to 'PlannedCost', 'BilledValue', and 'PlannedTurnover' respectively. The 'DefaultColor' is set to 'Category'. The 'Programs' field shows 'No entries'. The 'Projects' section displays a table with one project entry: 'Customizing crm system' with a status of 'Passive'. The table has columns for 'Number' (1, 4), 'Description', and 'Status'. The bottom of the form includes 'Issue' and 'Meeting' sections.

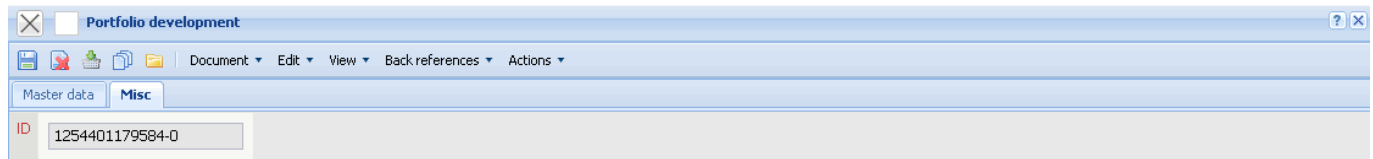
The form consists of the following elements:

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.



On the “Misc” tab:

- **ID:** This field contains the internal ID number.

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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Last update: **2019/10/25 14:09**

