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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 [2.02.14 Portfoliomanagement](#).

The screenshot shows the 'Portfolio development' form. The 'Master data' tab is selected, displaying the following fields:

- 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:** A table with one entry:

Number	Description	Status
1 4	Customizing crm system	Passive

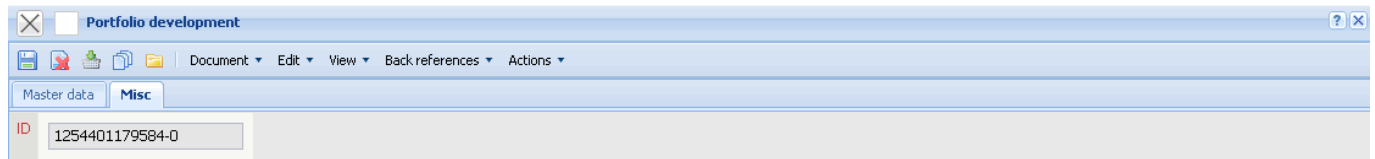
The form consists of the following elements:

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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