Project Portfolio Management

User Guide

mega

HOPEX V2

INTRODUCTION TO PROJECT PORTFOLIO MANAGEMENT

Project Portfolio Management (PPM) is an approach used by an organization to analyze the potential return of a set of projects. Its primary aims are to:

- Control the suitability of projects with respect to the strategic objectives of the organization.
- Ensure consistency between the projects and the organization's capability.

This approach examines the risks, the available funds, the probable duration of a project and the expected results. A group of decision-makers assesses the benefits and the priority to be given to each project to determine the best way to invest the capital and the human resources of the organization.

In HOPEX solutions, the **HOPEX Project Portfolio Management** option offers a set of functionalities to:

- Submit and assess the project demands and candidate projects.
- Validate the candidate projects: the project demand goes through a validation process that results in a project creation.
- Select and define the project priority: a limited list of projects is drawn up according to selection criteria (strategic, financial, etc.)
- Analyze and arbitrate the projects.
- Follow project progress.

> ☛ *Pour plus de détails sur les fonctionnalités de **HOPEX**, voir le guide **HOPEX Common Features** qui présente les fonctionnalités communes à tous les produits **HOPEX**.*

THE SCOPE COVERED BY PPM

In HOPEX, the **HOPEX Project Portfolio Management** option covers the following concepts:

- The management of project demands and candidate projects
- Project portfolio management

Prerequisites for Creating Projects

Importing the PPM Solution Pack

To be able to use functionalities of **HOPEX Project Portfolio Management**, you must first import the **PPM** solution pack.

It contains:

- The following portfolio types:
  - project demand portfolios
  - candidate project portfolios and projects in progress
- The states of the project:
  - Project demand
  - Candidate project
  - Ongoing project
- The two criteria weighting models:
  - PPM value & risk weighting model
  - PPM flat weighting model

For more details on importing a solution pack, see "Importing a Solution Pack in HOPEX", page 247.

Defining project domains

Each project belongs to a project domain.

Before creating a project, you must create the corresponding domain.

See "Defining Project Domains".

Managing Project Demands and Candidate Projects

Identifying and documenting demands

The demand manager can create a project demand or research a project demand created from an idea.

☛ *For idea creation, see "Submitting and evaluating ideas".*

The demand manager can document the project charter and its business case. He/she can in particular:

- Define the scope of the project in terms of deliverables or impact on the capabilities of the enterprise,
- Define a forecast budget,
- Identify the project risks,
- etc.

Assessing demands

The demand manager can assess a project demand:

- According to qualitative and quantitative criteria defined in the project demand portfolio.
- Through the qualitative assessment (business value level, strategic alignment, cost, global risk level), which is used to calculate a global score for the project and compare the projects between each other.

Validating demands

The demand manager can submit a project demand to the demand approver.

The approver can validate or reject the project demand.

A validated demand leads to the creation of a candidate project, submitted for assessment to project portfolio managers.

Assessing candidate projects

In the same way as demands are assessed, candidate projects can be assessed:

- According to qualitative and quantitative criteria defined in the project demand portfolio.
- Through the qualitative assessment (business value level, strategic alignment, cost, global risk level), which is used to calculate a global score for the project and compare the projects between each other.

Validating candidate projects

The approver can validate or reject the candidate project.

When a candidate project is validated, it takes on the status of a project in progress.

Follow-up of ongoing projects

The project portfolio manager assigns a manager to the project, responsible for follow-up of the progress of the project. You can view the calendar and the progress of a project in a report.

Project Portfolio Management

Selecting the projects and defining priorities

Portfolio managers and administrators define the project domains that determine the strategic perspectives of the organization in which the projects are classified (for example: "Business projects", "IT projects").

Arbitration portfolios are automatically associated with the domains of the projects created. They group the projects in the domain, classifying them according to their type (project demands, candidate projects and ongoing projects).

In an arbitration portfolio, the project portfolio manager and approver can create analysis portfolios; they represent a sub-set of projects in the arbitration portfolio and can be assigned to a specific project portfolio manager.

In an arbitration portfolio or an analysis portfolio, the project portfolio manager can:

- Browse, in read-only, the criteria assessed at the project level (for example, the strategic alignment level, the risk level, the cost level and other attributes specific to the project).
- Assess the criteria specific to the portfolio (other than the project criteria).
- Generate project comparison reports (for example, bubble charts) based on these criteria.

Using an arbitration portfolio or an analysis portfolio, the project portfolio manager can create scenarios.

In a scenario, the project portfolio manager can choose to select or not a given portfolio line (which is different from the project validation), and note the impact of this choice in dedicated reports.

Analyze and arbitrate portfolio projects

Using a portfolio, the project portfolio manager can generate analysis and comparison reports to compare, for example, the accumulated risks or costs of a given scenario.

The project portfolio manager can keep one scenario or a set of scenarios.

PROFILES AND ROLES OF HOPEX PROJECT PORTFOLIO MANAGEMENT

With **HOPEX Project Portfolio Management**, there are, by default, profiles and user roles with which specific rights and accesses are associated.

We differentiate between:

- Connection Profiles which are associated with the solutions that have the PPM option and which can create projects.

  `For example the Application Portfolio Manager in ITPM.`

  The content presented to each user in terms of menu trees and functions depends on the user connection profile, that is, the profile selected by the user to use the application.

- Connection Profiles specific to PPM:
  - Demand Manager
  - Project Portfolio Manager
  - Project Leader
- The roles associated with specific objects

  `For example, in a project domain, a project portfolio or a`
  `project, you can assign a Demand Manager, a Project`
  `Approver, etc.`

Connection Profiles specific to PPM can be included in higher level profiles, for instance the ITPM 'Application Portfolio Manager' profile is also 'Project Portfolio Manager', so has access to all the features. This means the elementary PPM profiles can be hidden by default for the benefit of the higher level profile, according to the 'profile' display setting.

To modify the profile display setting, see "Profile display".

PPM Connection Profiles

Demand manager

The demand manager is responsible for examining and approving or rejecting submitted project demands by validating, from a technical point of view, the project and business case charter.

Project Portfolio Manager

The portfolio manager is responsible for examining candidate projects in their entirety and approving or rejecting the candidate projects submitted by the demand managers. He/she is responsible for assessing the risk level, the strategic alignment and the costs/benefits of the project in the project portfolio, and to thus define the relative benefits of the candidate projects and projects in progress.

Project Manager

The project manager is responsible for project completion and follow-up.

Roles with respect to objects

Roles can be assigned for specific objects.

They are part of the workflow associated with objects.

Requester

The requester is the person who creates the demand (role created automatically on demand creation).

Demand Approver

The demand approver is responsible for validating the demand. The approvers can be defined globally for a project domain or a portfolio, or on a project-by-project basis.

Project Portfolio Approver

The project portfolio approver is responsible for validating the demand. The approvers can be defined globally for a project domain or a portfolio, or on a project-by-project basis.

DEFINING ENTERPRISE PROJECTS

According to the PMI® standard PMBOK, "a project is a temporary enterprise chosen with the aim of creating a product, a service or a unique result".

A project has a purpose in terms of an acquired, improved/extended or abandoned capability. A project generates project deliverables.

With **HOPEX Project Portfolio Management**, you can:

- Submit project demands
- Define project content
- Assess project demands and candidate projects.
- Follow project progress

The topics covered are as follows:

DEFINING PROJECT DOMAINS

A project can be defined in a given project domain.

The project domain defines the sector and the application scope of the project (for example: business function, IT, search and development). It is the container of a set of projects on which an arbitration can be conducted.

Two arbitration portfolios are automatically associated with a project domain:
- demand portfolios
- candidate project portfolios and projects in progress

For more details on arbitration portfolios, see "Grouping Projects by Portfolio", page 614.

Creating a Project Domain

To create a project domain:
1. Click the navigation menu, then **Transformation**.
2. In the navigation pane, select **Project Domains**.
3. In the edit window, select **Project Domains**.
   The list of project domains appears.
4. Click **New**.
   The create a project domain window appears.
5. Enter the name of the domain.
6. Click **OK**.

When you create a domain, the two types of portfolios that correspond to the different project statuses (project demands, candidate projects and projects in progress), are also created. They are visible in the **Transformation Portfolios** folder.

Assigning a Domain to Persons

It is possible to define particular roles for users on a domain; these roles are then valid for all the projects in the domain.

To assign a person to a domain:
1. Display the domain properties.
2. Click the **Assignment** page.
3. Click **New**.
4. In the window that opens, select the person or person group.
5. Select their role. You can define the following roles:
   - Demand Approver
   - Project Portfolio Approver
   - Project Portfolio Manager
6. Click **OK**.

MANAGING PROJECT DEMANDS

The demand creators and the demand managers can create new project demands and view the project demands that were generated using ideas.

Demand managers can document the project charter as well as the business case. They can in particular define the scope of the project in terms of deliverables and the risks associated with the project.

Demand Management Process

The project demand process is broken down into three parts:
- Creating the demand
- Evaluating the demand
- Approving or rejecting the demand
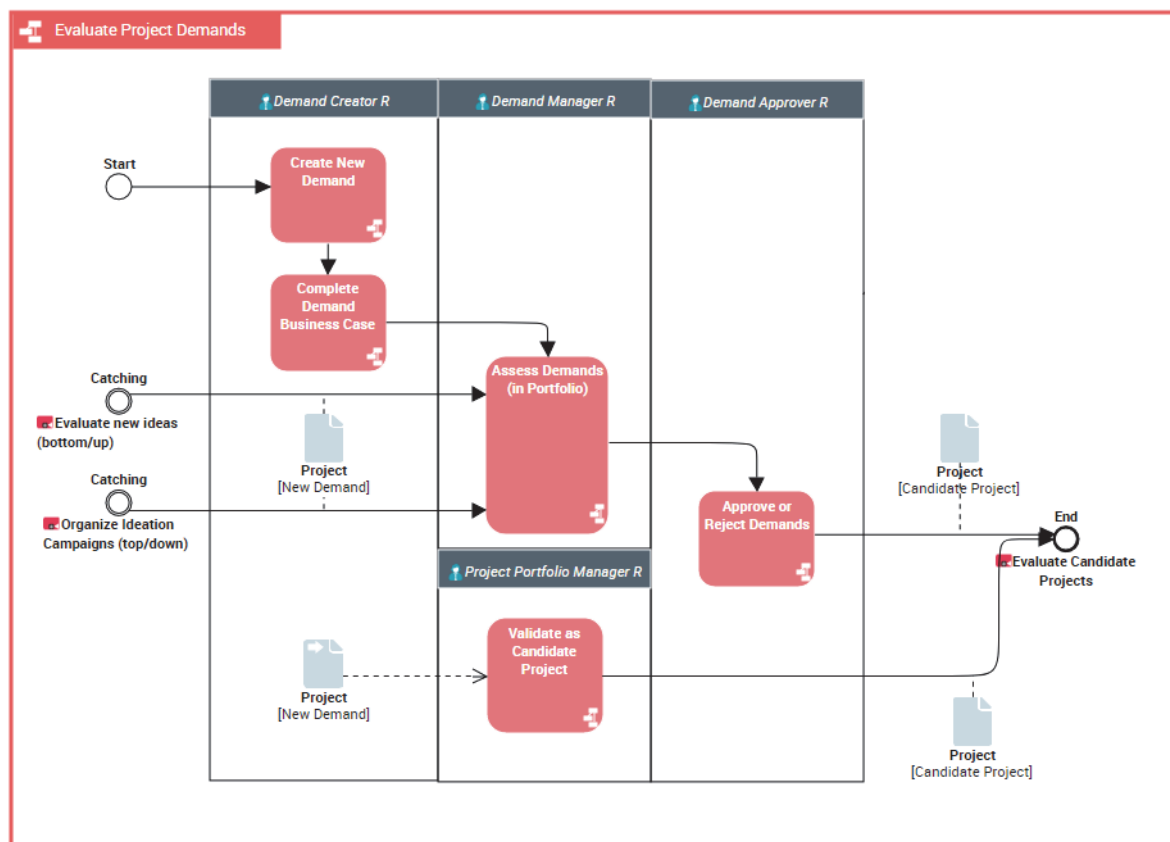
Creating a Project Demand

To be able to create projects, you must import the PPM pack solution. See "Prerequisites for Creating Projects", page 586.

You must also have created a project domain. See "Defining Project Domains", page 592.

To create a project demand:

1. Click the navigation menu, then **Transformation**.
2. In the navigation pane, click **Demands**.
3. In the edit window, display "All demands".
4. In the demands for the edit area, click **New**.
   The project demand creation window appears.
5. Specify:
   - The project name
   - the owner project domain
   - the project code (optional)
   - the planned start date
   - the planned end date
6. Click **OK**.

Defining the Project Charter

To define the charter for a project:

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the

   Properties button .
5. In the project properties window, click the drop down-list and select **Project Charter**.

The definition of the project charter includes:

- The **identification**:
  - project name
  - project owner domain
  - project code (optional)
  - project manager
  - state (life cycle status) Defined automatically.
  - status (workflow step). Defined automatically.
  - description (comment)
- The project **category or categories**. See "Idea category", page 599.
- The **initiating ideas**: ideas that have inspired the project.

Defining the Business Case of a Project

To define the business case for a project:

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the
    Properties button .
5. In the project properties window, click the drop down-list and select **Business Case**.

Transformation objective

A project has an objective with respect to the capabilities of the enterprise (as defined in a capability map); it can:

*   deliver the means to acquire a new capability (innovation)
*   extend the coverage of a capability already held (improvement)
*   restrict or abandon the coverage of an existing capability (rationalization).

To add a transformation objective to the project:

1. In the **Transformation Objective** section, click **New**.
    The creation dialog box for a transformation objective opens.
2. Specify:
    *   its name
    *   the transformation type (Innovation, Improvement, Rationalization)
    *   the capability transformed
3. Click **OK**.

Project deliverables

A project deliverable defines the result of a project and its impact on or its contribution to the architectural solution landscape of the enterprise.

It is defined by a solution block (example: an organization, an application, an infrastructure element) delivered by the project in the target architectural landscape. Within the framework of a project deliverable, a block can be:

*   New: the project delivers a new block to the target architectural landscape.
*   Updated: the project modifies an existing block in the current landscape, for example by extending its lifecycle, and delivers the updated version to the target architectural landscape.
*   Deleted: the project deletes an existing target architectural block, which will therefore not be part of the target landscape.

To add a deliverable to the project:

1. In the **Deliverables** section, click **New**.
    The window for creating a deliverable appears.
2. Specify if you want to:
    *   create a new block
    *   update an existing block
    *   decommission an existing block

3. Click **Next**.
4. Specify:
   - the deliverable name
   - the deliverable type
   - the deliverable production dates
5. Click **OK**.

Deliverable production dates

To model component change scenarios for elements in your portfolio without impacting the life of components in place, you will associate an *object life* with the deliverables.

> 📖 *The object life is a set of time periods representing the updated calendar of object life cycle states.*

When the project is terminated (via the corresponding workflow command), the life cycle of deliverables is automatically transferred to the objects concerned.

To define the life of a project deliverable:
1. In the **Deliverables** section, select the deliverable in question.
2. Click **Properties**.
   The properties window of the deliverable appears.
3. Click the drop-down list then **Object Life**.
4. Click **New**.
   The creation of object life dialog box appears.
5. Specify the following characteristics:
   - the **life cycle** that defines the list of possible object states.

     > ☛ *For more information on proposed life cycles, see "Defining Life Cycles".*

   - a **Begin Date** and an **End Date** which enable positioning of the object life in time.
6. Click **OK**.
   A Gantt char is used to view the steps of the life cycle of a deliverable.

On the project, the **Gantt char for the lifecycle of the project deliverables** details the lifecycle of the project deliverable.

Project dependencies

A project can depend on other projects:
- In a "positive" sense: a project can have another project as a prerequisite, of which one of the deliverables is necessary to build a deliverable of the dependent project (this is the equivalent of an AND logic: both projects must be conducted jointly to reach the final result).
- In a "negative" sense: two projects can be concurrent and mutually exclusive (this is the equivalent of the OR logic: only one of the projects must be managed, not both).

To associate a dependency with the project:
1. In the **Project Dependencies** section, click **New**.
2. Specify:
   - The name of the dependency
   - The project required
   - The type of dependency: "Exclusive" or "Prerequisite".
3. Click **OK**.

Project costs

The specification of the costs of a project take place through the cost lines.

One or more cost lines can be associated with a project.

    📖 *A cost line enables identification of cost kind and type.*

A cost line is characterized by:
- a type: operating or capital;
- a nature: infrastructure (for a deployment), license (for an application), service, manpower;
- state of the cost line .

Associated with a cost line can be:
- a periodic expense
- one or several fixed expenses

Creating a cost line

To create a cost line for a project:
1. Expand the **Costs** section.
2. Under **Cost Line**, click **New**.
   The **Creation of a cost line** box opens.
3. To create a single cost line, select option **Create only one cost line**.
4. Click **Next**.
5. Specify the **Name** of the cost line.
6. Select the **Cost Type**.
7. Select the **Cost Nature**.
8. Select the **state** of the cost line.

       ☞ *The states proposed in the drop-down list are the states of the life cycle associated with the object life.*

9. Click **Next**.
10. Define the periodic expense.

        ☞ *Fixed expenses, which can be multiple, are defined separately. For more details on fixed expense creation, see "Adding a fixed expense", page 597.*

11. Click **OK**.
    The new cost line appears in the **Cost Line**.

Adding a fixed expense

To associate a fixed expense with a cost line:
1. In the **Cost Line** section, select the cost line that interests you.
2. In the **Cost Line Expenses** section, click **New**.
   The **Creation of Expense** dialog box opens.
3. Specify:
   - the **Name** of the expense
   - the **Date** of the expense,
   - the **Amount** of the expense.
4. Click **OK**.
   The new expense appears in the **Fixed Expenses** section.

Project benefits

You can specify:

- the **Qualitative Benefits**: to be entered as a comment.
- the **Financial Value** of the project: in currency = project NPV (net present value), calculated outside the tool according to the standards of the enterprise.
- the **Return on Investment**: calculated attribute, as a %
  (Financial value - Budget) / budget
- the **Forecast Return on Investment**: calculated attribute, as a %
  (Financial value - Estimated total cost) / Estimated total cost
- the **Actual Return on Investment**: calculated attribute, as a %
  (Financial value - Real total cost) / Real total cost

Project risks

With **HOPEX IT Portfolio Management**, you can identify the risks linked to a project. Each risk is associated with a single project.

To create a project risk:

1. Expand the **Risk** section.
2. Click **New**.
   The risk creation dialog box appears.
3. Enter the name of the risk and the type of risk (cost, deadline, quality).
4. Click **OK**.

To assess risks, see "Assessing the Risks of a Project", page 604.

Assigning a Project to Persons

The persons who can be assigned to a project are those who perform one of the following business roles:

- Demand Approver
- Requester
- Project Manager
- Project Holder
- Project Portfolio Approver
- Project Portfolio Manager
- Project Stakeholder

The author of the idea and the innovation manager can assign persons to a project.

To assign a person or a person group to a project.

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the

   Properties button .
5. In the properties window, click the drop-down list and select **Assignment**.
6. Click **New**.

7. In the dialog box that appears, select a **Person** or a **Person Group**, as well as their **Business Role**.
8. Click **OK**.

Repeat this procedure to assign other persons to the project.

Validating or Rejecting a Project Demand

After assessment, the demand manager can submit the project demand to a demand approver.

☛ *For more details on assessment, see* *.*

The approver approves or rejects the demand.

Validating a project demand

A validated project demand becomes a candidate project; the state of its life cycle is automatically modified and it is transferred to the portfolios of the candidate projects in the domain to which it belongs.
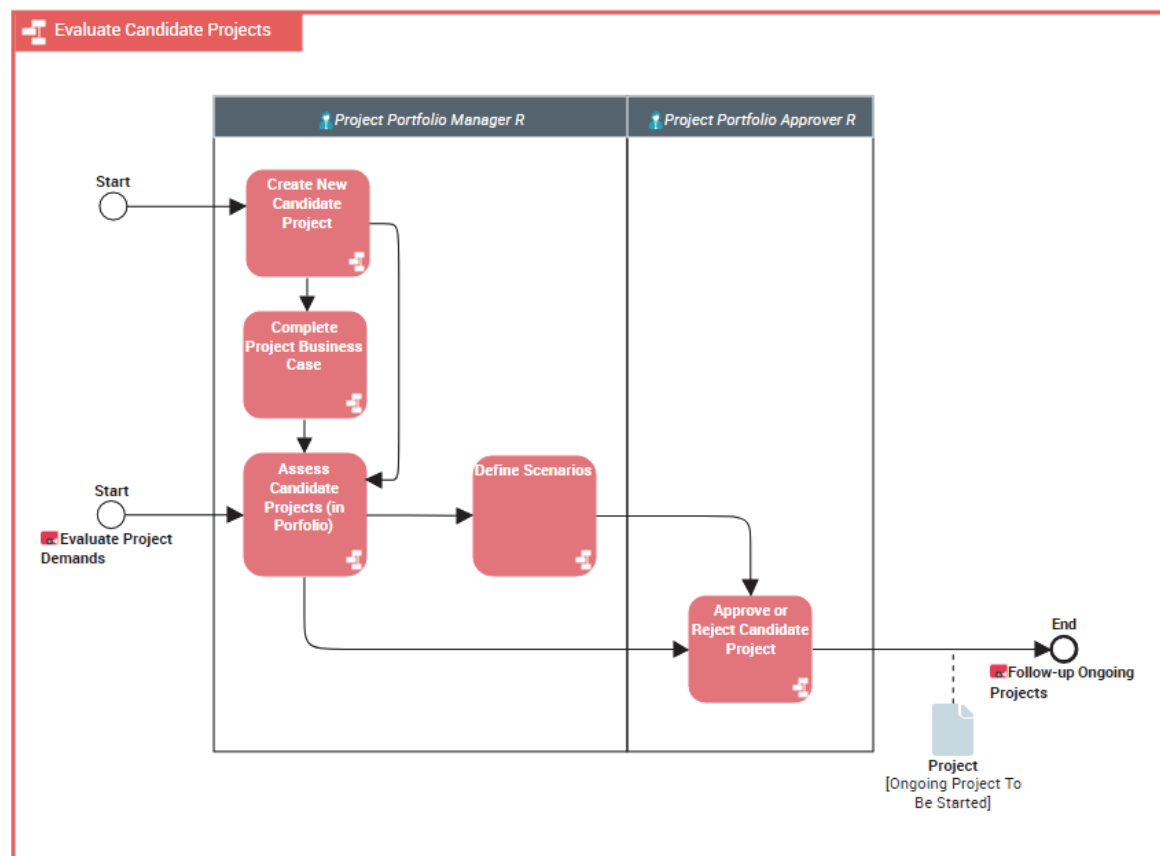
Rejecting a project demand

A rejected project demand remains in the list of projects, with the "Demand rejected" status. It can be archived.

MANAGING CANDIDATE PROJECTS

Candidate Project Management Process

The management process of a candidate project is broken down into three parts:

- Creating the project
- Assessing the project
- Defining the scenarios
- Approving or rejecting the project

Creating a Candidate Project

A project demand validation leads to a candidate project.

The project portfolio manager can create a candidate project directly without going through the demand management phase, or an ongoing project (in other words validated) if needed.

To be able to create projects, you must import the PPM pack solution. See "Prerequisites for Creating Projects", page 586.

You must also have created a project domain. See "Defining Project Domains", page 592.

To create a project candidate:
1. Click the navigation menu, then **Transformation**.
2. In the navigation pane, click **Projects**.
3. In the edit area, click **Projects**.
   Use the drop-down list to display:
   * all projects
   * projects by status (candidate projects, ongoing projects)
   * the projects assigned to you
4. Display all projects.
5. In the demands for the edit area, click **New**.
   The window for creating a project appears.
6. Enter the name of the project.
7. Select the "Candidate" project type.
8. Click **Next**.
9. Specify:
   * the owner project domain
   * the project code (optional)
   * the planned start date
   * the planned end date
   * the project leader
10. Click **OK**.

See also: "Creating a Project Demand", page 594.

Completing the Candidate Project Definition

Once the project is created, you can complete its properties in the same way as for a project demand.

See:
* "Defining the Project Charter", page 594
* "Defining the Business Case of a Project", page 595
* "Assigning a Project to Persons", page 598

See also:
* "Assessing a Project", page 603

Validating or Rejecting a Candidate Project

After assessment, the demand manager can submit the candidate project to a demand validator.

☞ *For more details on assessment, see "Assessing a Project", page 603.*

The demand validator approves or rejects the project.

Validating a candidate project

A validated candidate project becomes an ongoing project; the state of its lifecycle is automatically modified and it is transferred to the portfolios of the ongoing projects in the domain to which it belongs.

Rejecting a candidate project

A rejected candidate project remains in the list of projects, with the "Project rejected" status. It can be archived.

ASSESSING A PROJECT

A first assessment of a project takes place with the definition of the business case of the project; you can specify the deliverables, the dependencies with other ideas or risks, the costs, the benefits, the risks.

The business case elements can be defined on project demand, and subsequently completed. For more details, see "Defining the Business Case of a Project", page 595.

Once the project characteristics are defined, an evaluation tool facilitates the selection of projects and helps define priorities.

The demand managers can assess the projects:

- At the level of the project, via:
  - the qualitative review of the project (business value, level of strategic alignment, etc.)
  - the assessment of the project risks
- according to qualitative and quantitative criteria defined in the project portfolio. See "Assessing Portfolio Projects", page 616.

Assessing a Project

An assessment can concern a project demand or a candidate project.

To assess a project:

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the **Properties** button .
5. In the properties window, click the drop down-list and select **Project Assessment**.
6. In the **Assessment** section, click **New Assessment**.
   An assessment line appears.
7. In each corresponding column, specify:
   - the business value level
   - the strategic alignment level
   - the cost level
   - the global risk level

To validate the assessment, select the assessment line and click **Validate Assessment**.

> ☛ The ***Project Note*** *attribute visible on a portfolio is calculated automatically based on these values.*

Assessing the Risks of a Project

Assessing the risks of a project can start on project demand. This can take place globally on the project (in the **Project Assessment**) or for each risk associated with the project (in **Risk Assessment)**.

To assess the risks of a project:

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the **Properties** button ⌄.
5. In the project properties window, click the drop down-list and select **Risk Assessment**.
6. Click **New Assessment**.
7. In the window that appears, select the risks to be assessed.
   - Some
   - All
8. Click **OK**.
   The assessment appears in the properties window.
   You can define:
   - The**Impact**: characterizes the impact of the risk when it occurs.
   - The **Likelihood**: characterizes the probability that the risk will occur.
   - The **Inherent Risk Level**: The inherent (or gross) risk indicates the risk to which the organization is exposed in the absence of measures taken to modify the likelihood of occurrence or impact of this risk. This is the result of multiplying the impact value and the likelihood value before taking account of risk prevention or reduction measures.
     In summary, an inherent risk = impact x likelihood
     It is calculated automatically.
   - The **Control Level**: The Control level characterizes the efficiency level of control elements deployed (controls) to assess the risk.
   - The **Net Risk Level**: the residual (or net) risk indicates the risk to which the organization remains exposed after management has processed the risk. This is the difference between the Inherent Risk and the Control Level. It is calculated automatically.

See also "Analyzing the Project Risks of a Portfolio", page 622.

FOLLOW-UP OF ONGOING PROJECTS

## Process for Follow-up of Ongoing Projects

Ongoing projects result from the validated candidate projects.

☛ *A project portfolio manager can also directly create an ongoing project.*

The project portfolio manager assigns a manager to the project, responsible for follow-up of the progress of the project.

Project follow-up consists of the following steps:
- Starting the project
- Specifying the project milestones
- Updating the project progress
- Terminating the project
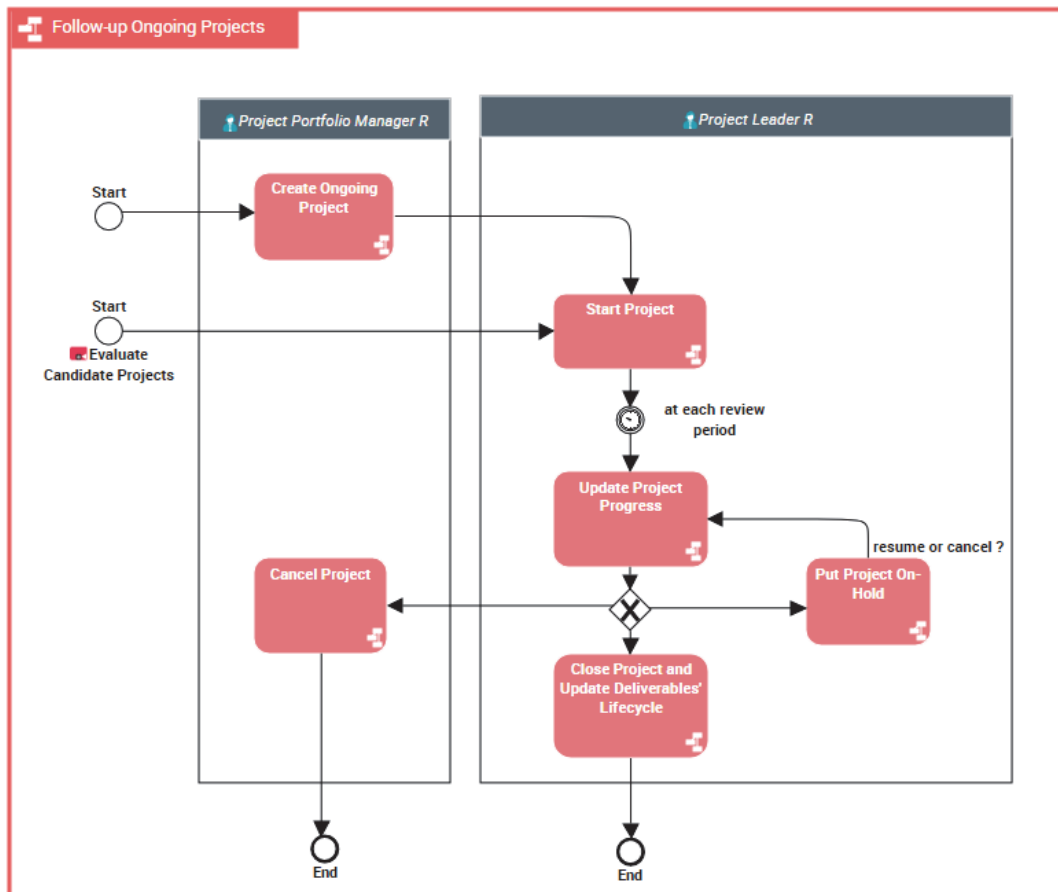
Starting a project

The project portfolio manager and project managers can start a project.

To start a project:

1. Click the navigation menu, then **Transformation**.
2. In the navigation pane, click **Projects**.
3. In the edit area, click **Projects**.
4. In the drop down list, select the list of ongoing projects.
5. Click the icon of the project concerned and select **Project Workflow (Project to Start) > Start the Project.**
   A dialog box appears:
6. Enter a comment if required and click **OK**.
7. Specify the effective start date of the project and click **OK**.
   The project workflow status switches from "To be started" to "Ongoing Project".

Specifying the Project Milestones

Between the scheduled start and end dates, intermediate milestones can be defined and associated with deliverables.

     📖 *A project milestone defines an intermediate delivery step in the life cycle of the project life. A project deliverable can be associated with a project milestone if it is delivered during the project and on the project date.*

     ☛ *Associating a project deliverable with a milestone does not affect automatic initialization of its life cycle; it can be subject to a manual modification if appropriate.*

Within the framework of project progress follow-up, you can define the level of progress for each milestone.

To add a milestone to a project:

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the

   Properties button ⌄.
5. In the project properties window, click the drop down-list and select **Project Milestones**.
6. In the **Milestones** section, click **New**.
   The window for creating a milestone appears.
7. Specify:
   - The local name
   - The scheduled date of the milestone
   - A comment if required
8. Click **OK**.

Assessing the Progress State of a Project

Updating the project progress

To update the progression of a project in progress:

1. Click the navigation menu, then the **Transformation** pane.
2. In the navigation pane, click **Projects**.
3. In the edit window, click **Projects** and display all the projects.
4. Select the project in question, and in the associated **Action** column, click the

   Properties button ⌄ .
5. In the project properties window, click the drop-down list and select **Execution Follow-up**.
6. In the **History of Project Progression Updates** section, click **New**.
   The progress rate creation window appears.
7. In the **Progress Rate** section, specify:
   - the progress rate percentage
   - the progress rate date
   - the assessment of the progress rate (On time or Late)
   - the forecast end date
   - the amount spent
   - the remaining forecast amount
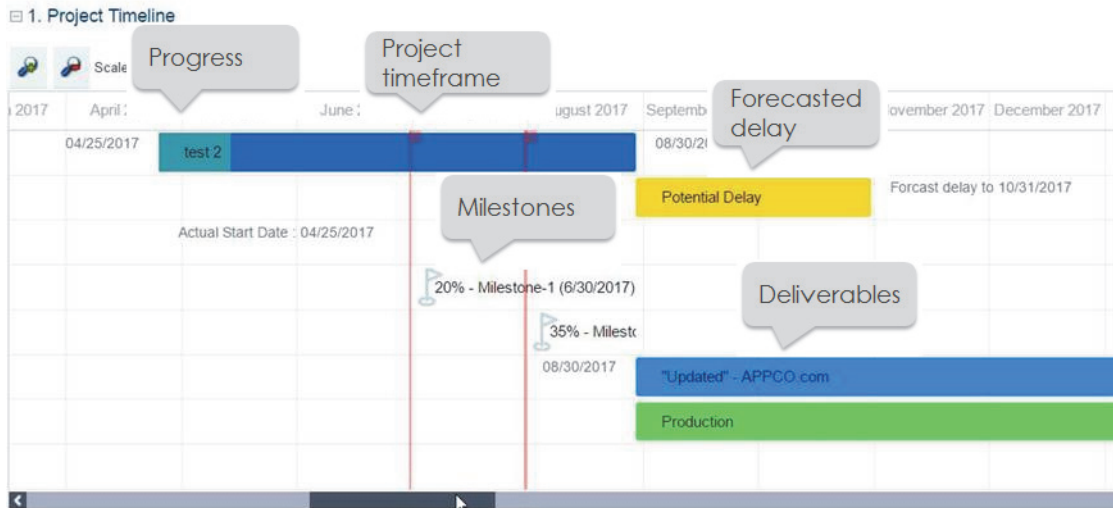8. Click **OK**.

Viewing the timeline of a project

A report enables you to view the timeline of the project.

To access the Reports tab:

1. In the project properties, select the **Reports** page.

2. Select the "Lifecycle Gantt Chart for Project Deliverables" report.
   The project calendar appears.

Putting a Project on Stand-by/Canceling a Project

For a project in progress, you can:
- Cancel the project: the project remains visible but cannot be recovered Update the project on stand-by: the status changes from "Project in progress" to "Project on stand-by". Subsequently, you can:
  - Recover the project on stand-by
  - Cancel the project on stand-by

Terminating a Project

Terminating a project updates the lifecycle of the objects attached to the project.

To terminate a project in progress:
1. Click the icon of the project then **Project Workflow (Ongoing Project)** > **Terminate the Project**.
   A message prompts you to confirm the changes to the lifecycle of the architecture blocks concerned.
2. Click **OK** to confirm.

REPORTS AVAILABLE ON THE PROJECTS

Dynamic reports are provided by default for projects; they are used to analyze project content from different angles.

Embedded reports for projects are visible in the **Reports** page of the project properties window.

Project Costs

This report details the project costs for a given period and by cost type (labor, infrastructure, etc).

Its input data concerns the costs defined in the project properties (on the **Business case** page).

☛ *To define the costs of a project, see "Project costs".*

It is possible to configure the cost consolidation period via the **Time Period** parameter; for example a sub-total of project costs is possible per quarter.

Time Period: Quarter ▾

(Refresh the report)

☐ 1. Project Costs

| Cost Nature	Cost Line	2018		Total
		Q1	Q2	
Manpower		€51,000.00	€34,000.00	€85,000.00
	$ Manpower	€51,000.00	€34,000.00	€85,000.00
Software Licence		€5,100.00	€3,400.00	€8,500.00
	$ Licences	€5,100.00	€3,400.00	€8,500.00
Total		€56,100.00	€37,400.00	**€93,500.00**

Project and Deliverable Timeline Gantt Chart

This report presents the lifecycle of deliverables in the project schedule.

Its input data concerns the production dates of the deliverables as well as the milestones defined for the project.

The progress of the project and the projected deadlines declared during the follow-up of the execution of the project are also reported on the graph.
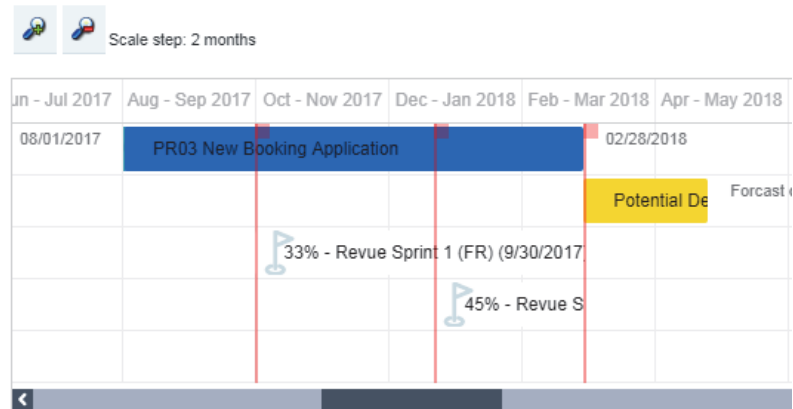
See also:
- "Project deliverables"
- "Specifying the Project Milestones"
- "Assessing the Progress State of a Project"
- "Analyzing the Road Map for Portfolio Projects".

Project KPIs

This report analyses the key indicators of the project. It collects the following data:
- The progress and any delays in the project (defined on the **Execution Follow-up** page for projects in progress)
- The budget and the costs defined on the project properties (on the **Business case** page).
- The Return on Investment (calculated)
- Cost variance (calculated)
- The project risks

Progression and delays

Project progression and delays are defined using the last update performed on the project.

☛ *For more details, see "Assessing the Progress State of a Project".*

Budget and costs

A bar chart presents the following data:

- The planned budget, input manually.
- The total forecast cost, calculated according to the last update of the project (amount spent + remaining to be spent)
- The effective cost, input manually at the end of the project.

☛ *The "Total cost" displayed in the Costs section is calculated based on cost lines; it is for information purposes and is not used in the report calculations.*

For information on project cost input, see "Project costs".

Return on investment

A bar chart presents the following data:

- Forecast ROI (as a percentage)
- Effective ROI (as a percentage)

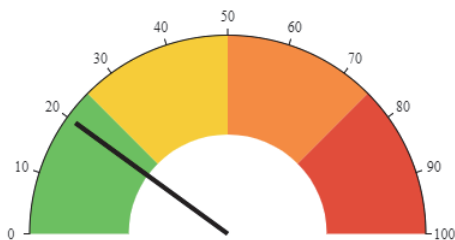Calculation of the ROI = (profit - budget) / budget.

Forecast variance and effective variance

A gauge displays the following data:

- Forecast variance = (total forecast cost - budget) / budget, as a percentage.
- Effective variance = (effective cost - budget) / budget, as a percentage.

Forecasted Cost Variance

Actual Cost Variance
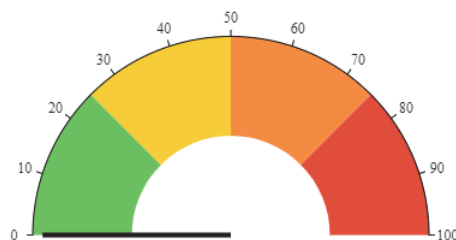
Risks

A bar chart displays the risks per risk level (low, high, etc.)

Project summary

This report offers a summary of the characteristics of the project, that is:

- The project charter
- The persons responsible
- The Business case
- The execution follow-up
- The key project indicators.

PROJECT PORTFOLIO MANAGEMENT

Whereas project management aims to focus on scheduling and executing an individual project, project portfolio management analyzes all projects in progress or potential projects and their viability in reaching the objectives of the enterprise.

The portfolio management process can be represented in three sub-steps:

- Project selection: a restricted list of projects is drawn up according to selection criteria (strategic, financial etc.). The projects are classified according to the strategic perspectives (the domains) used in the organization.
- Analysis and arbitration: the best project combination is defined to maximize the objectives and the restrictions of the portfolio.
- Follow-up: the portfolio's performance indicators ensure the alignment of the portfolio with the strategy of the organization.

The points covered here are:

GROUPING PROJECTS BY PORTFOLIO

Grouping projects by portfolio summarizes the information relating to different projects to facilitate decision-making.

Portfolio Types

There are two types of project portfolios:

- Arbitration portfolios, created automatically, which are divided into two groups:
  - project demand portfolios
  - candidate project and ongoing project portfolios, used to compare candidate projects with ongoing projects
- Analysis portfolios you can create later and which make up sub-sets within the arbitration portfolios

Arbitration portfolio

Project arbitration portfolios group all the projects created according to their domain.

When you create a project domain, two types of arbitration portfolios are created by default and associated with this domain:

- Domain name - demand arbitration portfolio
- Domain name - arbitration portfolio of candidate projects and ongoing projects

Each new project appears in the dedicated portfolio.

In an arbitration portfolio, the projects can be assessed and compared according to a number of criteria:

- project criteria: these come from information on the projects (for example, the costs) or the qualitative evaluation of the project (for example, the level of strategic alignment).
- portfolio criteria: criteria that can be defined at the portfolio level, above the project criteria.

See also: "Defining Project Domains", page 592.

Analysis portfolio

You can create an analysis portfolio in an arbitration portfolio; it groups a sub-set of parent arbitration portfolio projects. It can be defined to assign certain projects to a specific portfolio manager.

Portfolio Lines

For each project added to a portfolio, a portfolio line is created.

A project portfolio line is used to assess the project in the context of a portfolio. It is linked to assessment criteria and provides the global note of the project in the context of the portfolio.

See also "Assessing Portfolio Projects", page 616.

Assigning a Portfolio to Persons

The persons who can be assigned to a project portfolio are:
- the demand approver
- the portfolio manager
- the portfolio approver

For more information on profiles, see "Profiles and Roles of HOPEX Project Portfolio Management", page 589.

ASSESSING PORTFOLIO PROJECTS

You can compare projects defined in a portfolio based on common criteria.

You can also add specific assessment criteria to the portfolio.

Defining Portfolio Assessment Criteria

You can compare the projects defined in a portfolio based on common *criteria* associated with the portfolio. This is used in particular to define the priorities for each project within the portfolio.

Some criteria are provided by default. You can create new criteria.

To create a criterion on a project portfolio:

1. Display the portfolio properties.
2. Click the drop-down list, then the **Projects** page.
   The criteria appear in the **Portfolio Criteria** section.
3. Click **New**.
   The dialog box for creating a criterion opens.
4. Specify:
   - its name
   - its type
   - its length
   - its format
5. Click **OK**.

Criteria weighting model

A criteria weighting model defines, for a set of criteria, the weight relative to each of the criterion in the calculation of a weighted scoring criterion, used to automatically calculate the rank of a project in the context of this portfolio with respect to its score on these criteria.

Creating a Project Assessment

To create an assessment for the projects of a portfolio:

1. Display the portfolio properties.
2. Click the drop-down list then the **Project Assessment** page.
3. Click **New Assessment**.
4. In the window that appears, select the projects to be assessed.
   - Some
   - All

5. Click **OK**.
   An assessment line is created for each portfolio project with the different criteria in a column.
6. To define the value of a criterion for a project, select the line of the project concerned and click in the criterion column.

Assessing common criteria

The criteria common to all projects are calculated automatically on the basis of assessments performed specifically on the projects.

> ☛ *For the qualitative evaluation of a project to appear in the portfolio properties, the assessment must have been validated at the project level.*

Assessing criteria specific to the portfolio

For criteria created specifically for the portfolio, and are therefore not displayed in the project properties, you can define them directly on the project assessment line (drop-down list for a list or direct entry for a number/a text).

ANALYZING AND ARBITRATING PORTFOLIO PROJECTS

In a portfolio, a number of projects can concern a single object to represent different hypotheses, exclusive of each other, for the change in this object.

Scenarios can then be created by selecting a set of projects to be produced. The different scenarios can be compared by means of specific reports:

Using a project portfolio, the project portfolio manager can generate scenario analysis and comparison reports to decide which scenarios to keep or reject.

In an arbitration portfolio, if several scenarios have been selected for different analysis portfolios, the project portfolio approver has access to an analysis tool which provides an overview. This is used, for example, to determine whether contradictory choices exist for a single project in the different scenarios selected.
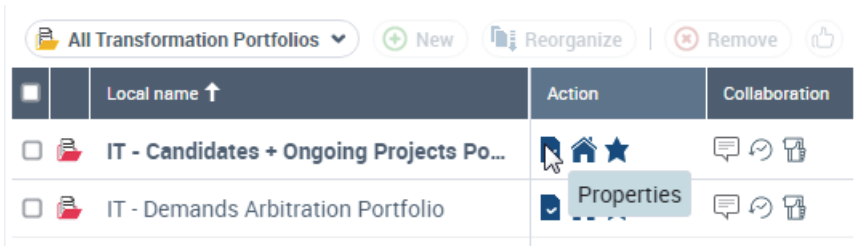
Creating a Scenario

Using an arbitration portfolio or an analysis portfolio, the project portfolio manager can create a number of scenarios.

A scenario defines, in a portfolio, a set of projects that can be implemented. It is used to generate analysis reports to assess the impact of this set of projects.

To create a scenario:

1. Click the navigation menu, then **Transformation**.
2. In the edit window, select **Project Portfolios**.
3. Display all the transformation portfolios.
4. In the list, display the project portfolio concerned and in the corresponding **Action** column, click **Properties**.

      The properties dialog box of the portfolio appears.

5. Click the drop-down list then **Transformation Scenarios**.
6. In the **Transformation Scenarios** section, click **New**.
   The dialog box for creating a scenario opens.
7. Enter the name of the scenario and click **OK**.

Defining the properties of the scenario

To define the properties of the scenario:

1. In the portfolio properties, in the **Transformation Scenario** page, display the scenario concerned and in the corresponding **Action** column, click the **Properties** button.
The scenario properties window appears on the right of that of the portfolio.
2. In the scenario properties, select the **Characteristics** page.
Note that for each project held in the portfolio, a scenario line is created.

Scenario lines

For each project held in the portfolio, a scenario line is created.

A scenario line corresponds to a project line in the source portfolio. It uses the values of the criteria and lifecycle defined on the project line of the portfolio. It is used to record the potential decision with respect to the project (validated, rejected) within the framework of the scenario analysis.

In a scenario, the project portfolio manager can decide to select or not select a given portfolio line in a simulated scenario (which is different from validation of the project).

Accepting or Rejecting the Project Lines of a Scenario

A project line must be accepted in order to be taken into account in a given scenario. Conversely, a project line must be rejected if you want the scenario to ignore it.

To accept or reject a project lines in a scenario:

1. Open the properties pages of the scenario.
2. Select the **Characteristics** page.
3. In the **Scenario Lines** section, select the project line you want.
4. In the **Decision** column, select one of the following values:
   - **Accepted**: the project line is integrated in the scenario.
   - **In progress**: the project line is under review; it is integrated in the scenario
   - **Rejected**: the project line is not taken into account in the scenario

Analyzing and Comparing Scenarios

With embedded reports, you can analyze and compare the scenarios created in a project portfolio.

To view these reports:

1. Display the properties concerned.
2. In the properties window, click the drop-down list and select the **Reports** page.
3. Select the report concerned.

Comparing scenario costs

This report compares the costs of the selected scenarios.

It relates to the project costs, it does not take into account the impact of the scenario on the operating cost of the applications.

Comparing the scenarios in terms of project deliverables or capabilities impacted

This report compares the scenarios of a portfolio on the basis of the deliverables supplied and the capabilities concerned.

The deliverables table specifies, for each scenario, the name of the deliverable and the percentage of deliverables that are new, updated and deleted.

The objective table specifies, for each scenario, the name of the capabilities and the percentage of capabilities that are new, updated or deleted.

See also:
- "Transformation objective", page 595
- "Project deliverables", page 595

Project deliverables by scenario

This report details the deliverables included in a scenario; they are classified by status and whether the projects within the scenario are validated or rejected.

☛ See *"Accepting or Rejecting the Project Lines of a Scenario", page 619.*

In the example below, two deliverables are part of the projects that were accepted in the scenario; a new CRM application and a server update.

The solution building blocks will thus be created/updated in the scenario.

☐ 1. Projects Deliverables

Project Impact Type	Validated Projects	Rejected Projects
New	New CRM Application	
Updated	Media Library Web Server	
Deleted		

Analyzing the Road Map for Portfolio Projects

The "Project RoadMap" report displays the Gantt chart for projects and the road maps for project deliverables.

To see this report:
1. Display the properties concerned.
2. In the properties window, click the drop-down list and select the
   Reports page.
3. Select the "Project RoadMap" report.

Project Gantt chart

The Gantt chart presents one row per project. The following information is provided
for each project:
- Start and end dates
- Progress
- Dependencies
- Declared delays

☛ *See also*
- *"Follow-up of Ongoing Projects", page 605*
- *"Project dependencies", page 596*.
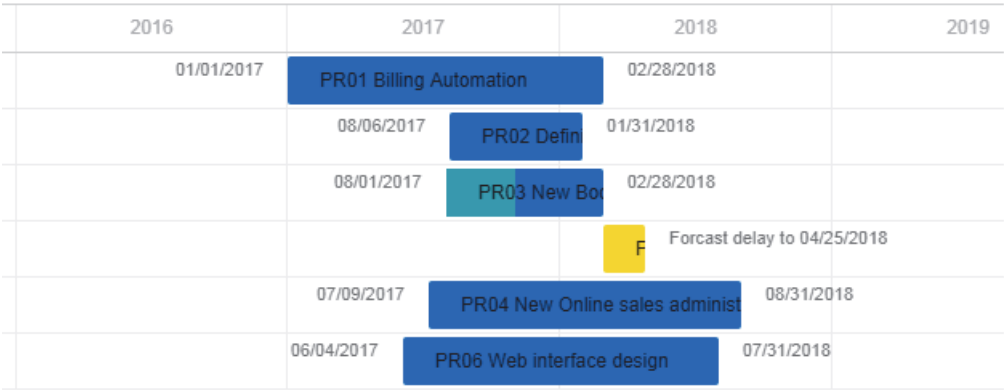
Roadmap of portfolio project deliverables

The following information is displayed for each portfolio:

- The projects included
- The dependencies
- The status of projects
- The project progress
- The dates defined for the project

☛ *See also "Follow-up of Ongoing Projects", page 605.*

□ 2. Projects Deliverables Delivery Roadmap

Portfolio	Project	Dependency (prerequisite)	Status	On Time ?	Project end date			2016	2017
					Plan	Forecast	Actual		
Portefeuille Open Data et Ecosystème (FR)	PR01 Billing Automation		Project In Progress	On Time	2/28/2018				
	PR02 Definition of the Billing Business Capacity		Project In Progress	Late	1/31/2018				
	PR03 New Booking Application	PR07 Billing software stack technical overhaul	Project In Progress	Late	2/28/2018	4/25/2018			

Analyzing the Project Risks of a Portfolio

An embedded report for the project portfolio is used to display, in the form of a heatmap, the risks inherent to the portfolio projects.

To view this report:

1. Display the properties concerned.
2. In the properties window, click the drop-down list and select the **Reports** page.
3. Select the "Project Portfolio Risk Roadmap".

The heatmap displays the number of risks per risk level (low, high, etc.)

See also: "Assessing the Risks of a Project", page 604.

Dashboard for Portfolio Projects

This report analyzes the projects included in a portfolio using different graphics.

To launch this report:

1. Display the properties concerned.
2. In the properties window, click the drop-down list and select the **Reports** page.
3. Select the "Project Dashboard" report.

Project bubble chart

The bubble chart is used to connect the different key indicators of the portfolio projects.

To define the project indicators to be displayed in the graph:

1. In the **X-axis** field, select the first indicator, for example, the profit.
2. In the **Y-axis** field, select the second indicator, for example, the total cost.
3. In the **Bubble size** field, select the third indicator, for example, the ROI.
4. Click **Refresh the Report** to take the selected data into account.

Project matrix by criteria

For this graph, the parameters selected for report input must be of "enumeration" type (e.g. Risk level, Business Value Level).

It allows to consult evaluations of a larger number of projects than the bubble graph (several hundred projects vs. a few dozen).

When you modify the input parameters, you must click on **Refresh the Report** to take into account the input data, then click the refresh button of the ⇄ chapter to update it.

Summary table for project assessments

This table presents the latest assessment of the key indicators of the portfolio project.

☐ 3. Projects Assessment Summary Table

	Strategic Alignment Level	Business Value Level	Risk Level	Cost Level	Budget	Benefits	Return on Investment	Project Score
PR01 Billing Automation	6 - Medium	4 - Low	1 - Very Low	10 - Very High	€500,000.00	€1,000,000.00	100%	3.94
PR02 Definition of the Billing Business Capacity	5 - Medium	4 - Low	6 - Medium	6 - Medium	€40,000.00	€40,000.00	0%	4.73
PR03 New Booking Application	9 - Very High	1 - Very Low	10 - Very High	5 - Medium	€1,000,000.00	€1,500,000.00	50%	2.71
PR04 New Online sales administration capacity	2 - Very Low	6 - Medium	6 - Medium	6 - Medium	€600,000.00	€700,000.00	17%	4.16
PR06 Web interface design	3 - Low	6 - Medium	6 - Medium	9 - Very High	€50,000.00	€60,000.00	20%	3.66