HOPEX PORTFOLIO & PLANNING

User Guide

HOPEX V4

MEGA

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CONTENT

INTRODUCTION

HOPEX Portfolio & Planningis a tool edited by **MEGA International** to assist:

- Decision-makers in their choice of actions to be undertaken to achieve enterprise strategic objectives.
- Management in the follow-up of actions implemented to manage changes within the enterprise.

HOPEX Portfolio & Planning enables to:

- Definition of the content of portfolios of the enterprise and of its departments in terms of initiatives or initiative groups.
- Understanding, classification, balancing and planning of portfolio initiatives.
- Updating of the state of initiatives in a portfolio reflecting the implementation of associated programs.
- Generation of comparison reports at functional, application and technical levels.

The purpose of this guide is to present how to make best use of these functionalities for the successful evolution of your organization.

OVERVIEW OF HOPEX PORTFOLIO & PLANNING

Modeling with HOPEX Portfolio & Planning

By means of portfolio management, **HOPEX Portfolio & Planning** enables planning over time of development of information systems, organizations and more generally all enterprise architecture.

Depending on the **HOPEX** products you have available, different object types can be described in enterprise portfolios.

Describing and Analyzing Portfolios

You can define contents of a portfolio directly from its diagram. This offers many advantages:

- Each initiative can be defined simply and rapidly. The icon of the object with which the initiative is associated appears in the diagram.
- Initiatives relating to the same program can be assembled in an initiative group.
- Dependency links between initiatives can be represented graphically.

HOPEX Portfolio & Planning compares your initiatives on standard criteria such as costs, benefits or risks. You can also define criteria specific to your context.

Reports dedicated to portfolios allow you to create charts enabling analysis of portfolios on different comparison criteria you have defined.

Analysis reports can be grouped in a **HOPEX** book or integrated in an Internet site.

Developing portfolios

Objects of your enterprise, such as applications or processes, will without doubt develop. So that representation of your organization remains updated, your models will be modified.

Used with other **HOPEX** Suite products, **HOPEX Portfolio & Planning** allows you to plan and follow up these developments which are transferred to all processes in which the elements concerned intervene.

- You can quickly access objects of which development is planned.
- You can transfer the impacts of development of a process to other programs in which this element appears.
- You can regenerate all reports in which this object is involved.

This user guide is designed to help you quickly discover the main functionalities of **HOPEX Portfolio & Planning** and how to use them.

Connect to the solution and learn about the desktop

HOPEX Portfolio & Planning is accessible using **MEGA International** solutions such as **HOPEX Business Process Analysis** or **HOPEX IT Portfolio Management**.

PRESENTATION OF THIS GUIDE

Guide Structure

This guide presents how to make make best use of **HOPEX Portfolio & Planning** to plan strategic organizational projects to be managed in your enterprise.

The **HOPEX Portfolio & Planning** guide comprises the following chapter:

- "Describing a Portfolio", page 5, explains how to create and update portfolio components.

Conventions Used in the Guide

Styles and formatting

     –   *Remark on the preceding points.*

)   *Definition of terms used.*

     M   *A tip that may simplify things.*

     .   *Compatibility with previous versions.*

     P   **Things you must not do.**

Very important remark to avoid errors during an operation.

Commands are presented as seen here: **File > Open**.

Names of products and technical modules are presented in bold as seen here: **HOPEX**.

DESCRIBING A PORTFOLIO

Creating a *portfolio* with **HOPEX Portfolio & Planning** allows you to define all the information that will then enable you to select *initiatives* to be implemented.

⟩ *A portfolio enables representation of all investments of an enterprise (or department) necessary to carry out changes required to achieve strategic objectives. It comprises a set of initiatives to be compared based on comparison criteria associated with the portfolio.*

⟩ *An initiative is a portfolio element corresponding to an investment program identified by the enterprise (or department) to achieve strategic objectives.*

You will begin by:

- 6 "Creating a Portfolio", page 6
- 6 "Defining Criteria", page 8
- 6 "Defining Initiatives", page 11
- 6 "Using Scenarios", page 14

CREATING A PORTFOLIO

Creating a process portfolio consists of defining *initiatives*, comparison criteria and timelines relating to the portfolio.

> ⟩ *A portfolio enables representation of all investments of an enterprise (or department) necessary to carry out changes required to achieve strategic objectives. It comprises a set of initiatives to be compared based on comparison criteria associated with the portfolio.*

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HOPEX Portfolio & Planning is accessible using **MEGA International** solutions such as **HOPEX Business Process Analysis** or **HOPEX IT Portfolio Management**. How to create a portfolio depends on the solution used.

> – *For more information on inventory portfolio management, see the **HOPEX IT Portfolio Management** guide.*

Creating a Transformation Portfolio

With **HOPEX Business Process Analysis**, **HOPEX Portfolio & Planning** allows you to manage process portfolios.

To create a process portfolio from the **Transformation** navigation pane:
1. Select **Process Portfolios** > **Process Portfolios List**.
2. In the **My Process Portfolios** tab, click **New**.
   A creation dialog box opens.
3. Enter the name of the process portfolio.
   The new portfolio appears in the list.

Creating a Process Sub-Portfolio

To be able to closely study development hypotheses, you can divide a portfolio into sub-portfolios, each subject to different *scenarios*.

To create a sub-portfolio:
1. Right-click the portfolio that interests you and select **New** > **Portfolio**.
2. Change the name of the sub-process.

> – *If a scenario is associated with a main portfolio, it is not inherited by the sub-portfolio.*

> – *You can create sub-portfolios from an initiative group. For more details, see *

Creating a Portfolio Diagram

The portfolio diagram enables representation of portfolio contents.

To create a portfolio diagram:

> › Right-click the portfolio name and select **New > Portfolio Diagram**.

Viewing and Updating the Contents of a Process Portfolio

All elements of a portfolio are accessible from the different pages of its properties dialog box.

- **Characteristics**: name, portfolio type, study dates, comment.
  - The list of **Owned Scenarios**: see "Creating a Scenario", page 14.
  - The list of **Sub-Portfolios**: see "Creating a Process Sub-Portfolio", page 6.
- **Criteria** of the process portfolio:
- **Timeline of reference** of the process portfolio:
  - *For more details on the timeline of reference of a portfolio, see "Using Timelines" in the* **HOPEX IT Portfolio Management** *guide.*
- **Initiatives**: This page enables listing of portfolio initiatives and to evaluate their criticality. See "Defining Initiatives", page 11.

DEFINING CRITERIA

You can compare initiatives defined in a portfolio based on common *criteria* associated with the portfolio.

> ⟩ *A criterion is a reference element used to compare initiatives in a portfolio. Criterion values can be predefined.*

To view criteria associated with a portfolio:

> › Open the **Criteria** properties page of the portfolio.

Example

Processes Portfolio			✕
Criteria ⌄			
⊕ New ⚲ Connect ▦ Reorganize ▤ X			▼
Local name ↑	**Aggregation Macro**	**Aggregation Policy**	**Aggregated Value**
▭ Business Impact		Average	2.5
▭ Costs		Average	700
▭ Priority		Average	4
▭ Risk of failure		Average	3

To define portfolio criteria, you can:

- Use criteria already existing in the repository.
- Create new criteria and associated values.

> – *Criteria are defined from the MetaClass (object type) **TaggedValue**. Certain dialog boxes use this term rather than **Criterion**.*
>
> – *For more information on the use of portfolio criteria, see "Defining Portfolio Assessment Criteria " in the **HOPEX IT Portfolio Management** guide.*

Evaluating the Objects of a Process Portfolio

Objects connected to Portfolio initiatives are assessed related to different portfolio criteria.

Accessing objects to be evaluated

To access evaluations of all portfolio objects:

1. Open the **Initiatives > Assessment** properties page of the portfolio. The matrix for assessment of all objects connected to portfolio initiatives according to different criteria is displayed.

2. To define a criterion value on an process, such as a Priority Level, select the process concerned and click in the criterion column.

Processes Portfolio

Initiatives - Assessment ▾

⊕ New   ⚭ Connect   ▥ Reorganize   🗎   X

| Local name ↑	Business Impact	Costs	Priority	Risk of failure	
Process Purchase Request	1 - Strategic	€900.00	Can wait	2 - Low	
Process Purchase Order	4 - Significant	€500.00	Medium	4 - High	

Generating an instant report on evaluation data

Instant reports allow you to carry out drill-down analysis on evaluated objects. They provide greater detail depending on specific analysis perspectives (quantitative, time, etc.).

To generate an instant report on a list of evaluated initiatives:

1. In the list of initiatives, select those to be analyzed.
   If you do not select an initiative, by default the report covers all initiatives.

2. Click on the **Instant report** ☰ button.

3. Select the required analysis type, for example "Bubble (Multidimensional)".
4. Click **OK**.

5. In the list of possible grouping criteria, select "Costs".
For all selected applications, you obtain the breakdown of implementation risks according to their level (low risk, high risk, etc.)
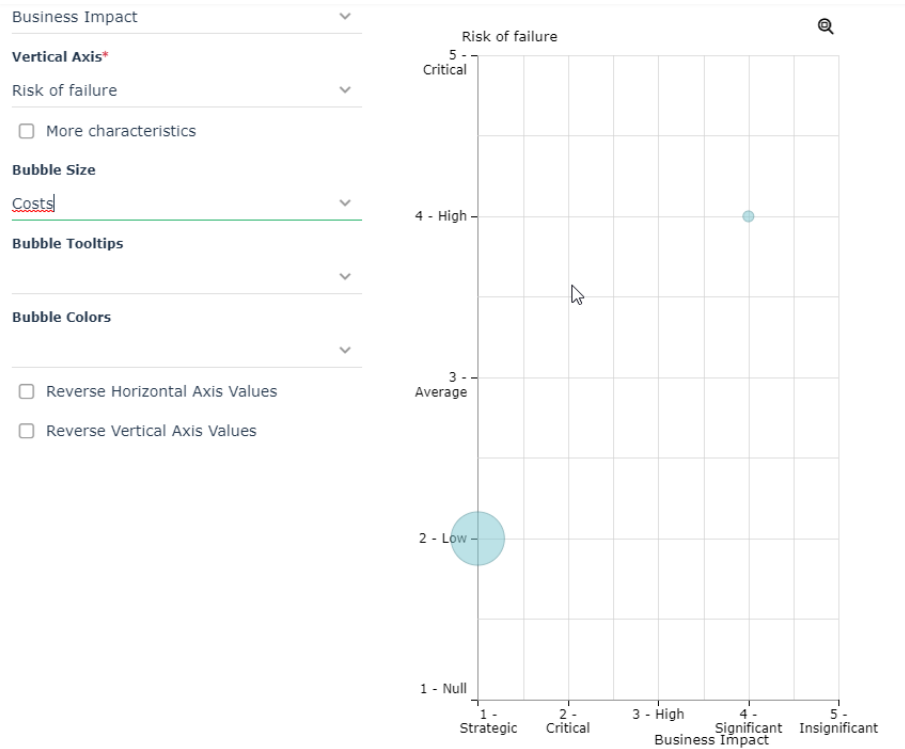
– *For more information on instant reports, see the paragraph "Running instant reports on a list of objects" in the chapter "Generating Documentation" of the* **HOPEX Common Features** *guide.*

DEFINING INITIATIVES

An *initiative* is associated with an enterprise repository object.

> ⟩ *An initiative is a portfolio element corresponding to an investment program identified by the enterprise (or department) to achieve strategic objectives.*

Depending on the HOPEX **Suite** products you have available, this object can be:

- org-unit
- an application
- a resource architecture,
- a business capability,
- a value chain,
- a business process
- an organizational process,
- a project,
- a product,
- an IT service,
- an application system.

Several initiatives can be grouped in an *initiative group* to simplify portfolio management.

An *initiative* is associated with an enterprise repository object.

> ⟩ *An initiative is a portfolio element corresponding to an investment program identified by the enterprise (or department) to achieve strategic objectives.*

Creating an Initiative

Creating an initiative from a process portfolio

To add an initiative to a portfolio:

1. Right-click the portfolio and select **New > Initiative**.
   The initiative creation dialog box appears.
2. In the **Element with Initiative** field, find in the list of objects that from which you want to create an initiative.
3. Click **OK**.

Adding an organizational process to a portfolio

To add an organizational process to the list of initiatives of a portfolio:

1. Select The **Process Design** pane.
2. Select **Processes** > **Organizational Processes List** > **All Organizational Processes**.

3. Select the organizational process that interests you and click **More > Add to Portfolio**.
A connection window opens.

4. Select the required process portfolios.

5. Click **Connect**.

Creating an Initiative Group

To create an initiative group from a portfolio diagram:

1. Click the **Initiative Group** button in the toolbar.

2. Position the initiative group in the portfolio frame.
The **Create Initiative Group** dialog box opens.

3. In the **Name** field, enter the name of the group.

4. Click **OK**.
The initiative group appears in the diagram.

To connect an initiative to an initiative group:

› Drag the initiative into the frame representing the group.

Defining Initiative Characteristics

To access information relating to initiatives:

› Open the **Characteristics** property page of the initiative.
The object to which the initiative relates appears in the **Element with Initiative box**.

Decision-making information is specified in the following boxes:

• **Decision**, which can take values:
  • **Accept**
  • **Reject**
  • **In progress**
• **Decision-Maker** and **Decision-Maker** User.

Modeling Initiative Costs

To view costs defined on an initiative:

› Open the initiative properties pages and select the **Costs** page.

Assessing Initiatives

Portfolio initiatives are assessed related to different portfolio criteria.

To access initiatives of all portfolio applications:
1. Open the properties pages of the portfolio.
2. Display the **Initiatives** > **Assessment** page.
   The matrix for assessment of all portfolio initiatives according to different criteria is displayed.
3. To define the value of a criterion, such as a cost, on an initiative, select the initiative concerned and click in the criterion column.
4. Specify values of the different criteria on each initiative.
5. Click **OK**.

Creating an Initiative Assessment Report

This report is a matrix that presents the value of the criteria presented in columns related to the process portfolio initiatives presented in rows.

To generate this matrix from the **Report** navigation pane:
1. Select **Other Reports** then the **Reports** tile.
2. In the **My Reports** tab, click **New**.
   The report creation dialog box opens.
3. In the list of report templates, select "Portfolio Initiative Assessment Sheet", then click **Next**.
4. Select the process portfolio that interests you and the associated criteria.
   You obtain a result like this:

Rapport-2 ⓘ			
Sub Portfolio (Initiatives) \ Creterion	**Business Impact**	**Costs**	**Priority**
⊡ Process Purchase Request	1.0	900.0	5.0
⊡ Process Purchase Order	4.0	500.0	3.0
Total	2.5	700.0	4.0

Report parameters

Parameter	Parameter type	Constraints
Portfolio (in row)	Portfolio	One object mandatory
Criteria list (in column)	Portfolio Criteria	At least one criterion mandatory

USING SCENARIOS

Several initiatives can relate to the same object, in the same portfolio, to represent different hypotheses (exclusive between themselves) of the same object.

scenarios can then be created by selection of a set of initiatives to be produced. The different scenarios created can be compared by means of specific reports:

>) *A scenario is a projection in time of development of real objects through initiatives.*

Creating a Scenario

A scenario is a coherent set of initiatives enabling costing of a hypothesis in a transformation portfolio.

To create a scenario on a portfolio:

1. Open the **Initiatives** > **Scenario** properties dialog box of the portfolio you want to study.
2. Click the **New** button.
   The scenario is created with a default name. It is also automatically connected to initiatives of the portfolio.

You can open its properties to modify its name if necessary or to define its properties.

Accepting or Rejecting Scenario Initiatives

An initiative must be accepted in order to be taken into account in a given scenario. Conversely, an initiative must be rejected if you want the scenario to ignore it.

To define initiatives to be taken into account in a scenario:

1. Open the **Initiatives** > **Scenario** properties dialog box of the portfolio you want to study.
2. Select the scenario that interests you.
   The list of initiatives connected to the scenario appears in the **Initiatives** section.
3. In the matrix, click the cells at intersections of initiatives and scenarios and select one of the following values:
   - **In progress**: the initiative is under study, it is integrated in the scenario
   - **Rejected**: the initiative is not taken into account in the scenario
   - **Accepted**: the initiative is integrated in the scenario.