The Plan Portfolio Handbook

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The Plan Portfolio Handbook

Contents

Abstract

Chapter 1

Introduction to Plan Portfolio Manager

1.1 Introduction

1.1.1

WIP: Work In Progress. Do not translate!

The Plan Portfolio Manager lets you manage multiple projects from a single application.

Two use cases:

- Managing multiple projects, giving an overview of where to focus attention.
- Inspecting and planning projects enterprise wide. Assisting with handling delays, changing priorities or incorporating new projects.

Features:

- Schedule or re-schedule multiple projects.
- Resource levelling across projects.
- Inspect planned resource usage across projects.
- Inspect and update progress information in table form as well as in charts.
- Inspect project gantt charts.

1.2 Context Help

1.2.1

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Many functions and views have help and hints that can be displayed with the *What's This* function.

You can activate it with the menu entry **Help** → **WhatsThis** or keyboard shortcut **Shift-F1**.

In dialogs it is activated by pressing the ? in the dialogs title bar.

Chapter 2

Portfolio Content

WIP: Work In Progress. Do not translate!

This editor enables you to configure the content of your portfolio.

Select **Edit** → **Add** (**Insert**) or press **Add** to add projects to your portfolio.

Select **Edit** → **Remove** (**Delete**) or press **Remove** to remove selected projects.

Add the projects you are managing and set **Portfolio** = *Yes*.

If you have resources that is used by projects not part of your portfolio and you want to re-schedule or inspect resource usage, you need to add all relevant projects and set **Portfolio** = *No* for these projects.

Storage

Project changes can be saved to the original project file or it can be embedded into the portfolio file. If you are managing projects, they should normally be saved to their original files. Set **Store** = *External* in this case. However, if you just want to see what impact changes might have, you may want to store projects embedded while you are working on different scenarios. Set **Store** = *Embedded* in this case. The projects external url is preserved if you later want to save the changes to the original file.

Chapter 3

Scheduling

3.1 Description

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The Scheduling view lets you schedule the projects in your portfolio. The projects are scheduled according to their priority.

Set *Control* to *Schedule* for the project or projects you want to schedule. Set *Control* to *Include* to have resource assignments included in resource leveling. Set *Control* to *Exclude* if you want to exclude the project.

TIP

If your projects share resources with projects that are not part of your portfolio, these projects needs to be included for resource leveling to work properly. See chapter 2.

The view has tree sections:

- Section 3.2.
- Section 3.3.
- Section 3.4.

3.2 Table of Projects

Name	Description
Name	Project name
Schedule	Schedule name
Status	Scheduling status

Control	Scheduling control can have the following values: • *Schedule:* The project will be scheduled. • *Include:* Resource bookings will be included in resource levelling. • *Exclude:* The project will not be included.
Priority	Project priority. A higher number means higher priority.
Target Start	The earliest project start time
Target End	The latest project finish time
Description	Project description

3.3   Scheduling Control

WIP: Work In Progress. Do not translate!

3.4   Scheduling Log

WIP: Work In Progress. Do not translate!

Chapter 4

Summary

WIP: Work In Progress. Do not translate!

This view summarizes performance data for the projects in your portfolio.

Name	Description
Name	Project name
Schedule	Schedule name
SPI Cost	Schedule Performance Index (Cost based)
CPI Cost	Schedule Performance Index (Cost based)
SPI Effort	Schedule Performance Index (Effort based)
CPI Effort	Schedule Performance Index (effort based)

SPI indicates if the progress is on schedule (1), behind schedule (less than 1) or ahead of schedule (greater than 1). CPI indicates how much it has cost to obtain the actual progress. A value of 1 means as planned, less than 1 means it has cost more than it should have done and a value greater than 1 means that the progress has bean obtained with less resource usage than planned.
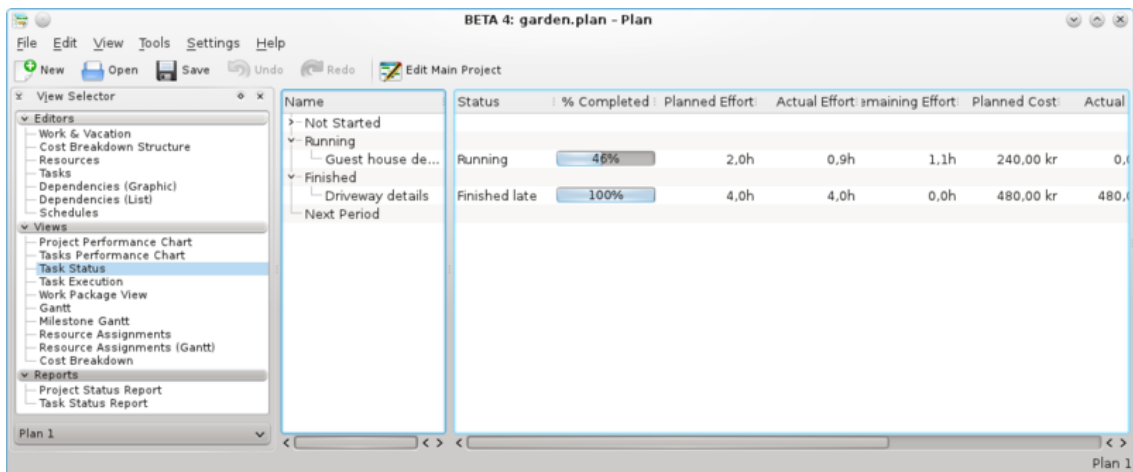
Chapter 5

Progress

5.1 Description

WIP: Work In Progress. Do not translate!

The progress view lists the projects in your portfolio on the left and shows progress information for the selected project on the right.
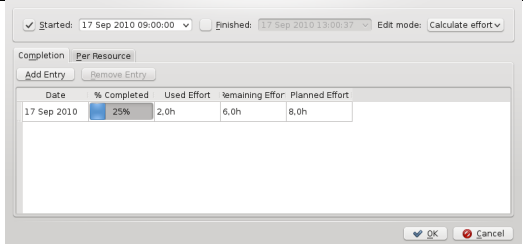

The tasks are divided into groups dependent on the status of the task:

Not Started	Tasks that should have been started by now.
Running	Tasks that have been started, but not yet finished.
Finished	Tasks that were finished in this period
Next Period	Tasks that are scheduled to be started in the next period.

5.2 Editing data

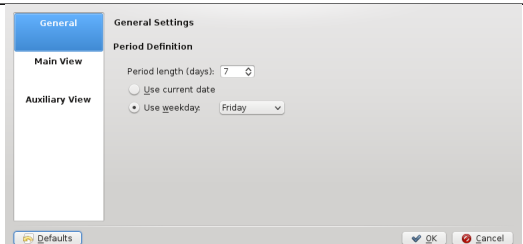|	
Progress information can be edited in-line or by using the task progress dialog.	

The following columns are displayed as default:

Column	Description
Name	The name of the task.
Status	Task status
% Completion	Task completion
Planned Effort	The amount of work planned to be used at the end of the current period.
Actual Effort	The amount of work spent.
Remaining Effort	The remaining effort needed to complete the task.
Planned Cost	The planned cost at the end of the current period.
Actual Cost	The actual cost incurred.
Actual Start	The actual start time of the task.
Actual Finish	The actual finish time of the task.

5.3   Configuration

Using the context menu, the view can be configured to split / unsplit the tree view or it can be configured using the configure dialog.

The configure dialog enables you to tailor the amount of information the view displays to fit your needs.	

Chapter 6

Performance

6.1   Description

WIP: Work In Progress. Do not translate!

Shows charts of the performance of selected project.

Chapter 7

Resource Usage

7.1 Description

WIP: Work In Progress. Do not translate!

Shows a chart of the load planned for selected resource color coded per task.

Chapter 8

Gantt Summary

8.1   Description

WIP: Work In Progress. Do not translate!

Shows a gantt chart of all projects in your portfolio.

A gantt view for a project can be shown by selecting **`Context Menu->Open Project`**.

Chapter 9

Configuring Portfolio

9.1   Document

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Chapter 10

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