

## Contents

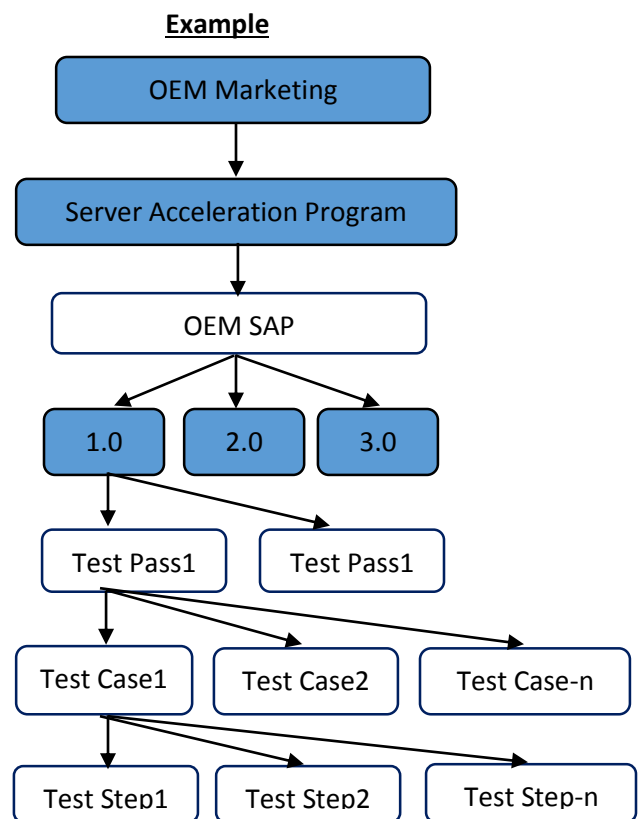
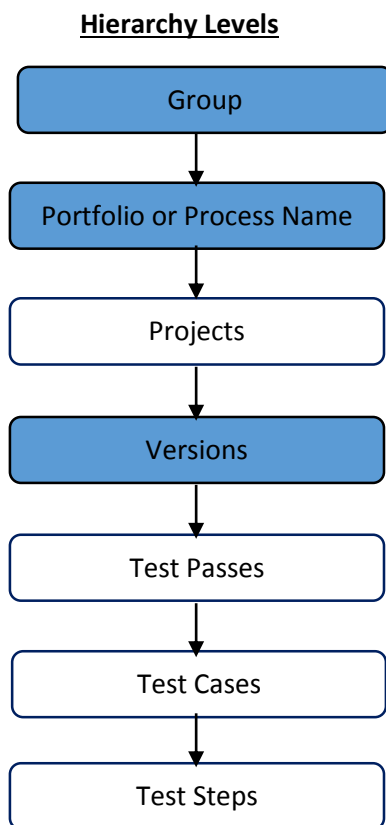
A.	What is Portfolio Management?.....	2
	Advantages of Portfolio .....	3
B.	Configuration of Portfolio Management .....	3
	Portfolio Management.....	3

## A. What is Portfolio Management?

In Portfolio Management each project is part of a portfolio (or a process) and Portfolio is under a Group.

For example: For group name 'OEM Marketing', Portfolio (or Process Name) is 'Server Acceleration Program' and project is 'OEM SAP'.

- A group can have multiple Portfolio/Process in it and Portfolio/Process can have multiple projects in it.
- With the help of Portfolio Management Projects are categorized by Groups and Portfolios.
- If a Manager is heading/leading multiple groups of the same portfolio then he can view the UAT status of all projects a Portfolio as per separate Groups (all groups) at a glance. (And this applies to all Reporting kind of sections like, Main Dashboard, Dashboard Stakeholder, Reports, Feedback, etc.)



### Advantages of Portfolio

1. Portfolio feature helps to manage the Projects in an organized way by specifying its Group and Portfolio as per the organizational hierarchy standards.
2. Manager can create new Portfolio and Group (if it is not already available) and then creates the Project (along with its version) under the appropriate Portfolio and Group.
3. If a Manager is heading/leading multiple groups of the same portfolio then he can view the UAT status of all projects a Portfolio as per separate Groups (all groups) at a glance. (And this applies to all Reporting kind of sections like, Main Dashboard, Dashboard Stakeholder, Reports, Feedback, etc.)

## B. Configuration of Portfolio Management

### Portfolio Management

Here user can **only once** configure the UAT application in 'Enabled Portfolio' mode to use Portfolio Management with simple steps:

Configuration page → General Settings → Application Level Options → Select Portfolio Options  
→ select the "Enable Portfolio" radio button -> Click 'Yes' on confirmation pop up

Below is the screen sample of 'CREATE PROJECT' form for 'Portfolio in Enabled Mode'

## Portfolio in Enabled Mode:

PROJECTS  
Step 01

TEST PASSES  
Step 02

TESTERS  
Step 03

TEST CASES  
Step 04

TEST STEPS  
Step 05

ATTACHMENTS  
Step 06

### Project Details

[VIEW ALL](#) [CREATE NEW](#)

Group/Team Name:\*

Microsoft

Add New

Portfolio/Process Name:\*

Survey Desk

Add New

Project Name:\*

MSFC

Add New

Version:\*

2.0

Description:

Microsoft Survey and Feedback Center

Start Date:\*

04/28/2014

End Date:\*

02/11/2015

Version Lead:\*

RSINNGP\harshal.wadaskar

Please use the address book to add the user.

Version Stakeholders:

Vandana Nilapwar

A project can have only 20 Version Stakeholders at maximum.

Status:

Active

Project URL:

Application URL:

Save

Cancel

### Note:

- Configuration of UAT Application to 'Enable Portfolio' is a onetime process. Once the user set it as 'Enabled', he cannot change it to 'Disabled'.