Portfolios

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CONTACT Software

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CHAPTER 1

Introduction

Management of the product and project portfolios is a sign of the innovation and development strategy within the company. Transparency, clarity and a direct link to the operational development functions are indispensable. CONTACT Portfolios provides you with the Portfolio Navigator, an intuitive tool for defining portfolios and using them in day-to-day product development.

The connection with the maturities in the product lifecycle enables a comprehensive, strategically guided portfolio evaluation.

Among others the module enables:

- organization according to business areas, product lines, and more.
- Structure and nomenclature define the framework for all operational processes
- Intuitive navigation to the concrete and current products and projects
- Basis for continuous portfolio planning and evaluation

Portfolio fundamentals

A portfolio is a hierarchical structure that you can freely define. You can create and manage different types of portfolios. A portfolio consists of different elements:

- The "Portfolio" object is the container in which all other subelements are created.
- Categories: A category classifies the respective hierarchy level. Exactly one category is assigned to each hierarchy level.
- Folders are the content elements of a hierarchy level. Any number of folders can be in each level.

The figure *Example of a product portfolio.* (page 2) shows a product portfolio example with bicycles:

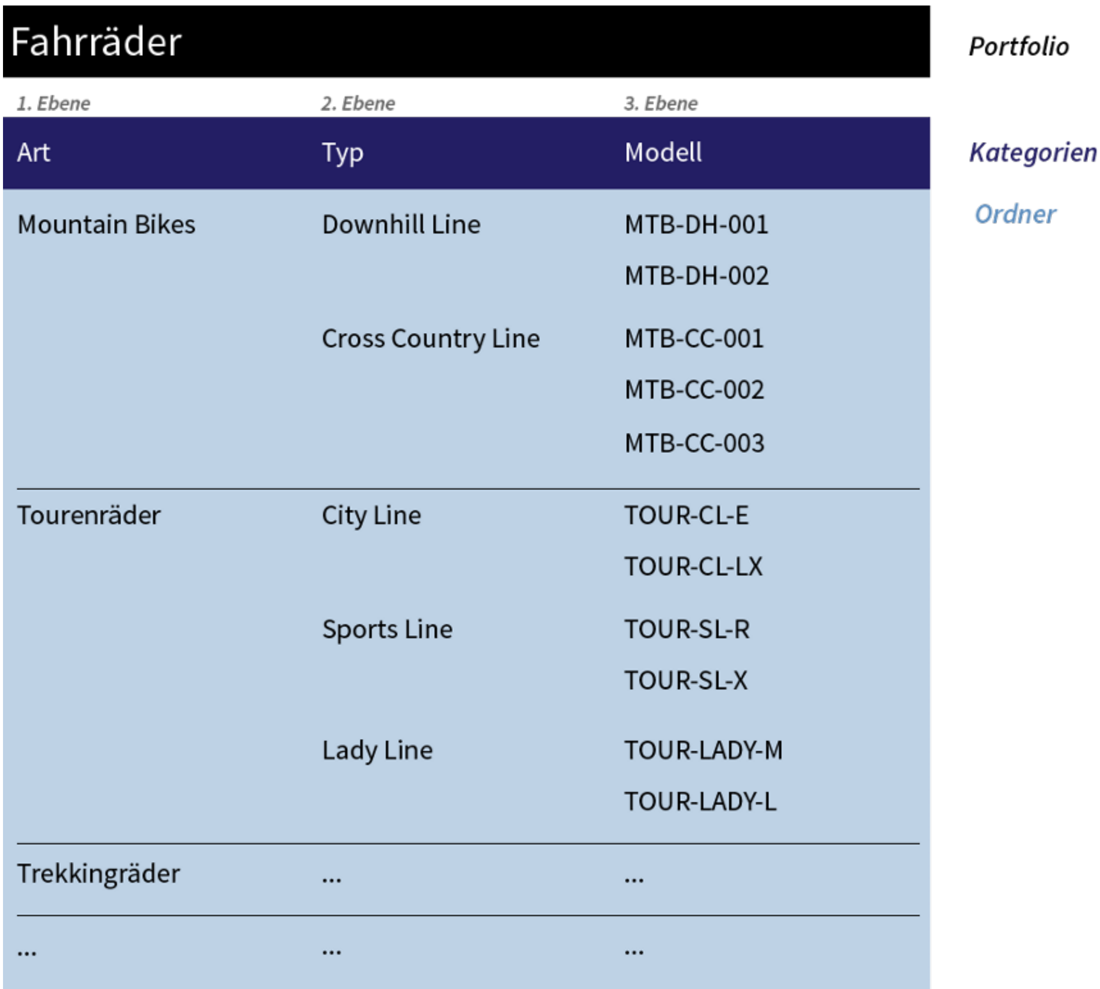

Fig. 2.1: Example of a product portfolio.

CHAPTER 3

Display of portfolios

The above structure can be mapped differently in CS.Portfolios depending on the use case:

- The portfolio overview displays the portfolio in a tree structure. This view is primarily suitable for defining portfolios.
- In the Portfolio Navigator, the portfolio is displayed in an alternative visual view. Here, users will navigate through existing portfolios and view information about the respective elements. The Portfolio Navigator is described separately in one of the following chapters.

CHAPTER 4

Defining portfolios

Before you create a portfolio, we recommend that you model it as completely as possible.

The Chapter *Portfolio fundamentals* (page 2) has an example portfolio, which serves as a template for the following sections.

4.1 General process

A portfolio can be created according to the following schema:

1. Creating the portfolio
2. Creating the categories/hierarchy levels: This is where you define the structure and depth of the portfolio hierarchy.
3. Creating the top-level folders: This is where you define the first level of your portfolio structure.
4. Creating subfolders: This is where you define the further levels of your portfolio structure.

4.2 Creating a portfolio

1. Right-click *Portfolios* in the navigation area. A pop-up menu appears.
2. Select the command *New ...*. The dialog for creating a portfolio opens.
3. Enter the name of the portfolio. In the example above, `Fahrräder` (*Name[de]*) and `Bicycles` (*Name[en]*). Optionally, you can specify an icon for the portfolio under *Icon*.

Note: You can specify a customized icon that your administrator created beforehand in CS.Portfolios.

4.3 Creating the categories

You can create the categories either in the portfolio overview or in the modify dialog of the portfolios. The following instruction describes how to create in the overview, since you get a better overview here of how the portfolios are structured:

1. In the navigation, open the hit list of the portfolios by double-clicking *Portfolios*. The list is opened in a new tab.
2. Open the portfolio overview by double-clicking it; in the example above, `Bicycles`. The overview is opened in a new tab. The tab is divided horizontally. The portfolio structure is on top; the objects belonging to the element selected above are on the bottom. When you have created the portfolio, the structure is empty; in the top hierarchy level you see the name of the portfolio.

3. Switch to the *Portfolio categories* area below.
4. Right-click in the empty list area. A pop-up menu appears.
5. Select the command *New ...*. The dialog for creating the portfolio category opens.
6. Enter the name of the category and the level of the hierarchy for the first level, in the example above, `Art` and `Type` in the mandatory fields *Name[de]* and *Name[en]*. Enter the value `1` in the Level field.
7. Click the *New* button. The category is created and appears in the list of the portfolio categories.
8. Enter the further portfolio categories. In the example above, `Baureihen/Series` with the level value `2` and `Modell/Model` with the level value `3`.

4.4 Creating the top-level folders

Once you have defined the categories completely, you can create the portfolio structure. To do so, create folders in the categories with the content elements. The following instruction describes this process again in the portfolio overview.

1. To create the folder, switch to the *Top-level folders* area in the first level.
2. Right-click in the empty list area. A pop-up menu appears.
3. Select the command *New ...*. The dialog for creating a folder opens. The *Category* field is prepopulated with the first level, in the example above, `Type`.
4. Enter the name for the folder, in the example above, `Mountain Bikes` for the mandatory fields *Name (de)* and *Name (en)*.
5. Click the *New* button. The folder is created in the first hierarchy level. It appears simultaneously in the list and as the first element in the tree structure in the upper area.
6. Create the complete first level of the portfolio structure according to the same schema.

4.5 Creating subfolders

Once you have defined the first level of the portfolio structure, you can set up the further levels of the structure.

1. In the tree structure in the upper area, select the top-level folder for which you want to create subfolders. In the example above, `Mountain Bikes`.
2. Select the *Subfolders* area below.
3. Right-click in the empty list area. A pop-up menu appears.
4. Select the command *New ...*. The dialog for creating a subfolder opens. The *Category* and *Parent folder* fields are prepopulated, because you have selected an element in the tree structure above. In the example above, `Mountain Bikes` as top-level folder and `Series` as category of the second hierarchy level.
5. Enter the name for the folder, in the example above, `Downhill Line` for the mandatory fields *Name (de)* and *Name (en)*.
6. Click the *New* button. The folder is created in the selected category. It appears simultaneously in the list and as the first element in the tree structure in the upper area.
7. Create the complete portfolio structure according to the same schema.

4.6 Displaying portfolios in the Portfolio Navigator

The Portfolio Navigator shows portfolios and their folders if they have the state *valid*. The state is displayed in the portfolio overview by the green state icon.

1. Right-click the element in the tree structure. A pop-up menu appears.
2. Select the *State change* command. The dialog for changing the state appears.
3. Under Target state, select the state *Valid* and click the *State change* button.

CHAPTER 5

Assigning other objects such as documents, projects, parts

In principle, each business object can be assigned to a portfolio folder. The assignment is made by dragging and dropping the object onto the respective portfolio folder. The objects assigned in this way are then displayed in the *Assignments* tab of a folder and in the portfolio overview.

If the assigned objects are to be displayed in the Portfolio Navigator, assign objects only to what are called leaf folders (folders without their own subfolders), since the Portfolio Navigator visualizes the assignments for these only. For non-leaf folders, the Portfolio Navigator visualizes only the respective subfolders.

CHAPTER 6

The Portfolio Navigator

The Portfolio Navigator provides an alternative visual access to your portfolios.

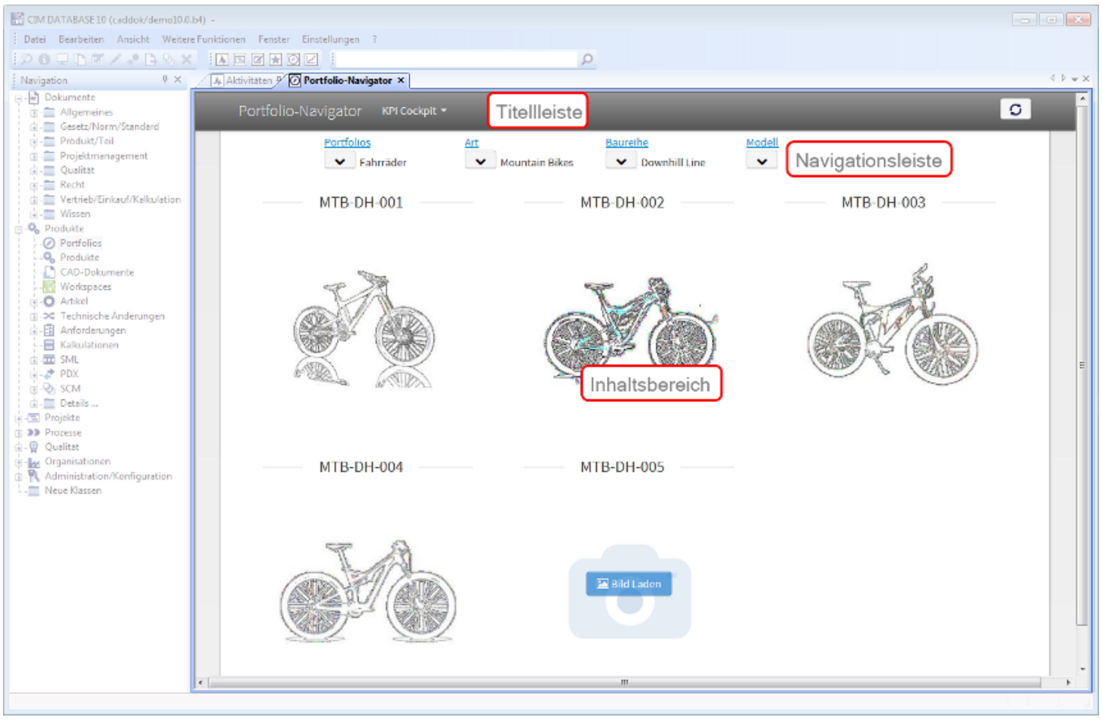

Fig. 6.1: Overview of the portfolio navigator

The hierarchy levels and your categories are presented in the navigation bar. The folders are displayed in the content area as thumbnails with an image. In the *Overview of the portfolio navigator* (page 8) figure you can see the models of the `Downhill Line` series of the `Mountain Bike` type.

6.1 System access

6.1.1 Start in Windows client

Click the *Portfolio Navigator* symbol in the toolbar. The Portfolio Navigator opens in a new tab.

6.1.2 Start in the web browser

Click the *Portfolio Navigator* symbol in the header. The Portfolio Navigator opens in the same tab.

6.1.3 Navigating in a portfolio

When you start the Portfolio Navigator, it shows the valid portfolios in the system. You have two options for navigating one level deeper:

- Open the selection list of the portfolios in the navigation bar and select the portfolio into which you want to navigate.
- Click the thumbnail of the portfolios (not the *Upload Picture* button).

The portfolio is opened and the thumbnails of the next lower level are displayed.

Note: If only one valid portfolio is defined, it is navigated to directly and the thumbnails of the next lower level are displayed.

6.1.4 Navigating to a higher level

You can navigate into any higher level via the navigation bar.

- If you click the link of the category, the thumbnails of this level are loaded.
- If you select an entry in the selection list of a category, the thumbnails in this folder are shown (thus one level lower than in the previous option).

6.1.5 Loading or changing the thumbnail image

You can load an image for every thumbnail in the formats JPG, GIF, and PNG.

1. Click the *Upload Picture* button. The dialog for loading an image appears.
2. Click the *Browse* button. The file selection dialog of your operating system appears.
3. Select a file with a correct format as usual and click the *open* button. The dialog closes and the path to the file is entered into the input field.
4. Click the *OK* button. The file is loaded and the image is displayed in the thumbnail.

Note: If an image already exists, you can replace it. To do so, position the mouse pointer on the image. The *Upload Picture* button appears and you can upload a new picture as described above.

6.2 Leaf folders

Leaf folders are folders that have no subfolders. In the Portfolio Navigator, the assigned products, project and other documents for the leaf folders are displayed in pulldown menus.

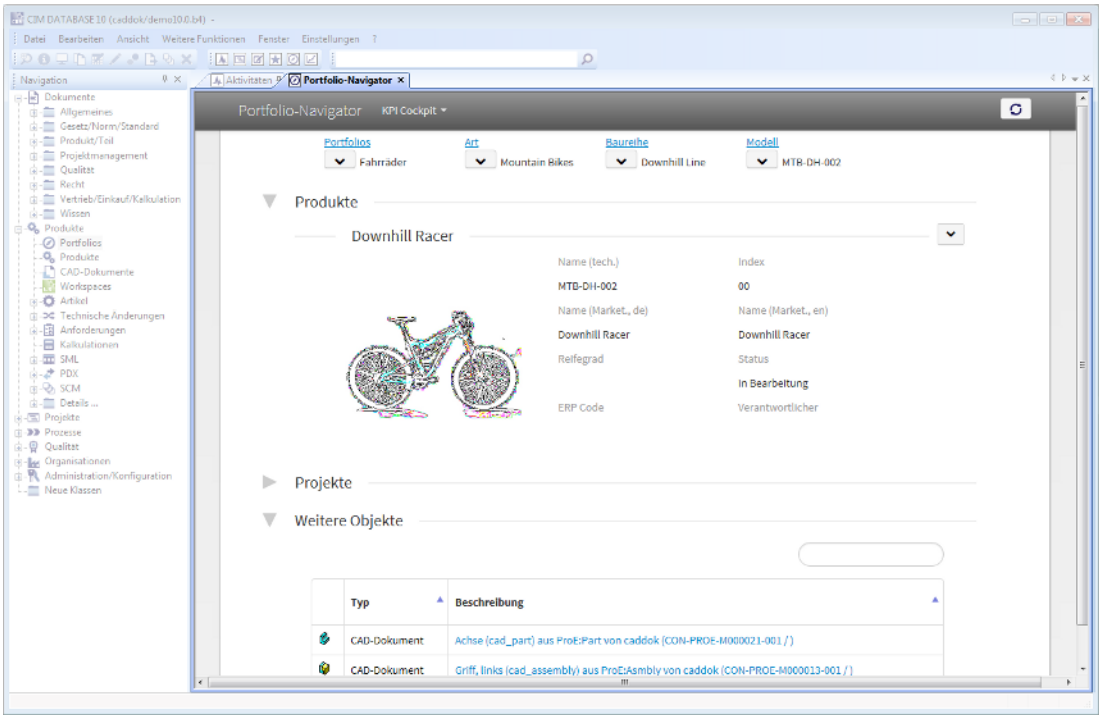

Fig. 6.2: A leaf folder in the Portfolio Navigator

CHAPTER 7

Quality characteristics

You can use the KPI module to analyze your portfolios. Various KPIs are preconfigured in the standard version (see the user manual for *KPIs*), for example:

- Amount of products
- Product turnover per year (uses the product KPI turnover per year)
- Amount of current projects
- Project efforts per year

Note: You or your administrator can change the preconfigured KPIs or create new ones.

7.1 Opening KPI Cockpit

Select the *KPI Cockpit* command in the header in the selection menu.

CHAPTER 8

Growth-Share Matrix

You can call up a Growth-Share Matrix for the product portfolios. This is an analysis tool for the strategic management of product portfolios (http://de.wikipedia.org/wiki/BCG-Matrix).

The Growth-Share Matrix is implemented as PowerReport and requires the following product KPIs, which are preconfigured by default:

- Price (to be entered manually)
- Sales per year (to be entered manually)
- Turnover per year
- Expected market growth (to be entered manually)
- Relative market share (to be entered manually)

The only products for the Growth-Share Matrix evaluated are those for which these KPIs have been recorded.

8.1 Opening the Growth-Share Matrix

Select the *Growth-Share Matrix* command in the header in the selection menu.

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