

IT portfolio management template

User guide lessons

IBM Rational Focal Point version 6.5.1

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Table of contents

Introduction	5
Prerequisites	5
Objective	5
Lesson 1: Add users and members	6
Prerequisites	6
Purpose	6
Instructions	6
Lesson 2: Set up a workspace for IT portfolio management	8
Prerequisites	8
Purpose	8
About this lesson	8
Instructions	8
Lesson 3: Add and submit project proposals	11
Prerequisites	11
Purpose	11
Instructions	11
Lesson 4: Assess new project proposals	13
Prerequisites	13
Purpose	13
Instructions	13
Lesson 5: Create project business cases	15
Prerequisites	15

Purpose	15
About this lesson	15
Instructions	16
Lesson 6: Approve and prioritize projects	19
Prerequisites	19
Purpose	19
About this lesson	19
Instructions	19
Lesson 7: Pre-plan projects	23
Prerequisites	23
Purpose	23
Instructions	23
Lesson 8: Approve projects for implementation	26
Prerequisites	26
Purpose	26
Instructions	26
Lesson 9: Allocate resources	29
Prerequisites	29
Purpose	29
Instructions	29
Lesson 10: Integrate with a CLM system	31
Prerequisites	31
Purpose	31
Instructions	31
Lesson 11: Monitor project implementation	33

Prerequisites	33
Purpose	33
Instructions	33
Notices	36
Trademark acknowledgments	38

Introduction

The IT portfolio management template is a pre-configured template that you can use in IBM® Rational® Focal Point. The lessons in this document will help you learn how the IT portfolio management template is intended to be used.

Prerequisites

To complete the lessons, you must meet these prerequisites:

- Have an administrator login to IBM® Rational® Focal Point™.
- Have a workspace that is based on the IT portfolio management template.
- Complete the required preparations to use the workspace, as described in the help in Rational Focal Point. In particular, see “Setting up the IT portfolio management workspace”. To complete [Lesson 10: Integrate with a CLM system](#), you must set up an integration with a Change and Configuration Management Application in a Collaborative Lifecycle Management (CLM) system.

Objective

The primary objective of completing these lessons is to learn how to get started with Rational Focal Point by using a workspace created from the IT portfolio management template.

Lesson 1: Add users and members

Prerequisites

You must be logged in as an administrator.

Purpose

Add users and members and assign roles to them.

Instructions

1. Add six users:
 - a. Click **Users > Add User**. Enter the following information:
 - **Full Name**: The user's given name and surname
 - **Login Name**: A unique user name
 - **Password**
 - **E-mail**: The user's email address
 - b. Click **OK**.

2. In the upper menu bar, click **Workspaces**.

The **Workspaces** link opens the list of workspaces that you are a member of. When you are on the Add User page, you are not inside a workspace. After you click **Workspaces**, you can use the left menu to complete tasks to administer the product; for example, add users, define application settings, and create workspaces. You can also open a workspace by clicking its link.

3. Click the IT portfolio management workspace.
4. Add a member:
 - a. Click **Members > Members**, and click **Add Member**.
 - b. Select a user from the list, or search for a user and then select the user from the search results.

- c. Click **Next**, and then click **Finish**.
- d. Assign the user a role by dragging the user to one of the folders under the **Members** folder.
- e. Repeat steps a-d until you add six users as members of the workspace. Place one user in each of the main roles. The users will inherit the appropriate access rights for their roles. To change the role of a user, drag the user to another role.

Note: Never place a user in the **Secondary Roles** folders. Only users who have a main role can have a secondary role. To add a secondary role to a user, make sure that the user has a main role, and edit the Secondary Roles attribute for the user.

5. Assign the secondary role of proposal owner to the business stakeholder user:
 - a. Select the business stakeholder and expand **General Information**.
 - b. For the Secondary Roles attribute, click the **Edit** icon.
 - c. In the search field, type `Proposal Owner`. Press Enter.
 - d. Under Select Members, select **Proposal Owner**.
 - e. Click **OK**. The business stakeholder user now also has the proposal owner role.

Lesson 2: Set up a workspace for IT portfolio management

Prerequisites

- You must be logged in as an administrator.
- You must have completed lesson 1.

Purpose

Prepare for the lessons that follow this lesson, and learn how to sort views and add elements.

About this lesson

You can sort the views in the menu according to your preferences. You might find views more quickly if you sort views based on their modules. To better understand the process to manage an IT portfolio, you can study the process image. After you understand the process, you can add elements to your workspace to meet your requirements.

Instructions

1. Sort the views in the menu:
 - a. Click **Preferences**.
 - b. Click **Miscellaneous Settings**.
 - c. Under View Sort, from the **By attribute** list, select **View Definition**.
 - d. Click **OK**.
2. Click **Workspaces** and click the IT portfolio management workspace.
3. Display the process image by clicking **Display > Process**. To view a larger image, click it.
4. Add three portfolios:

- a. Click **Modules > Portfolios**.
 - b. Click **Add > Portfolio**.
 - c. Enter the portfolio title.
 - d. Click **OK**.
 - e. Repeat steps a-d to add two more portfolios.
5. Add three business units:
- a. Click **Modules > Business Units**.
 - b. Click **Add > Business Unit**.
 - c. Enter the business unit title.
 - d. Click **OK**.
 - e. Repeat steps a-d to add two more business units.
6. Add three applications:
- a. Click **Modules > Applications**.
 - b. Click **Add > Application**.
 - c. Enter the application title.
 - d. In the list **Type**, select **Internal**.
 - e. Click **OK**.
 - f. Repeat steps a-e to add two more applications.
7. Define five strategic objectives:
- a. Click **Modules > Criteria**.
 - b. Expand the **Strategic Objectives** folder and select **Objective 1**.
 - c. Expand **General Information**. For the Title attribute, click the **Edit** icon.

- d. Rename the objective and save it.
- e. Repeat steps a-d to define four more strategic objectives.

Lesson 3: Add and submit project proposals

Prerequisites

- You must be logged in as a business stakeholder user.
- You must have completed lessons 1 and 2.

Purpose

Add and submit a new project proposal.

Instructions

1. In the IT portfolio management workspace, add a new project proposal:
 - a. Click **Add > Project Proposal**.
 - b. Enter information in the following fields:
 - **Title**
 - **Description**
 - **Type**: The project type
 - **Portfolio**: The portfolio to which the project is related
 - **Submitter**: By default, the submitter is the same as the project creator, but you can select another user to be the submitter. You might select a different user than the creator if one user creates a project on behalf of another.
 - **Business Units**: The business units that are interested in the project
 - **Comments**
 - **Related Applications**

- **Primary Strategic Objective:** The primary strategic objective that the project will fulfill
 - **Project Objectives**
 - **Business Value:** The business value the project will provide
 - **Parent Folder:** Each folder represents a program. Select the program the project belongs to, if any.
- c. Click **OK**.
2. Click **Display > My Draft Project Proposals**.
3. Submit the project proposal:
- a. Under Transitions, click **Submit**.
 - b. If needed, enter additional comments.
 - c. Click **OK**. The project proposal is submitted and is no longer visible among your draft proposals. The IT analyst can now assess your proposal.

Lesson 4: Assess new project proposals

Prerequisites

- You must be logged in as an IT analyst user with the secondary role of proposal owner.
- You must have completed lessons 1 through 3.

Purpose

Assess and estimate new project proposals.

Instructions

1. In the IT portfolio management workspace, click **Display > New Project Proposals**.
2. Select the project to assess.
3. Under Transitions, click **Accept**.
4. For the IT Analyst attribute, click **Click To Add Link**.
5. Select the IT analyst user, and click **OK**. The project proposal is accepted for assessment and the IT analyst is assigned to assess the proposal.
6. Click **Display > My Project Proposals to Assess**.

Note: IT analysts can display their assigned project proposals on their home pages. To view your proposals from your home page, click **Home**; the proposal is displayed under **My Project Proposals To Assess**.

7. Select the project to assess.
8. Start the assessment:
 - a. Under Transitions, click **Investigate**.
 - b. Optional: Enter comments.
 - c. Click **OK**. You can now edit additional attributes:

- **Target Duration:** Target duration of the project in months
- **Estimated Project Cost**
- **Business Feasibility**
- **Technical Feasibility.**
- **Time of Project Delivery:** The year and month when the project is to be delivered
- **Scope Ideation:** The approximate project scope

9. Optional: Create a business case.

The IT analyst can create a business case for a project, send the project to the Ready for prio state, or reject the project. A project proposal that is estimated to have a high cost or long duration must have a business case that describes its benefits and costs. Before the steering committee can approve a project for prioritization, it must review the business case.

A project proposal that is estimated to have a low total cost or short duration can be transferred directly to the Ready for prio state without a business case. This state is a shortcut for projects that do not need to be investigated before the steering committee can prioritize them. If the IT analyst determines that a project proposal does not have enough business value, costs too much, or does not align with the strategy, the analyst can reject the proposal.

To create a business case:

- a. In the transition area, click **Create business case**.
- b. Select the current user as proposal owner.
- c. Click **OK**.

Lesson 5: Create project business cases

Prerequisites

- You must be logged in as a user with the secondary role of proposal user, for example the same user as in lesson 4.
- You must have completed lessons 1 through 4, including the optional step “Create a business case”.

Purpose

Create a business case for a project proposal. The business case includes the following information about a project:

- The problem that the project is intended to solve
- Risk assessments
- Scope
- Financials, such as high, low, and likely benefits and expenditures per quarter

About this lesson

As a proposal owner, you can go to your home page to access the proposal for which to make the business case. The content on your home page is determined by your role. Your home page displays information that you might be interested in or that you need to complete your tasks.

When the project proposal no longer meets the criteria to be displayed on a proposal owner’s home page, you can no longer see the proposal on your home page.

The home page also always contains three panels:

- **Welcome to IT Portfolio Management in Rational Focal Point:** The company logotype and a welcome message
- **My Project Proposals to Clarify:** Project proposals that you submitted and must clarify
- **My Owned Open Risks:** Open risks that you own and must mitigate

Instructions

1. In the IT portfolio management workspace, click **Home**.
2. In the **Create Business Case for Projects** area, click the project.
3. Define the business case by updating the Problem and Solution attributes.
4. Add a risk:
 - a Click **Add > Project Risk**.
 - b Enter the following information about the risk:
 - **Title**
 - **Description**
 - **Projects:** The projects that the risk is related to
 - **Attachments:** Files that are related to the risk
 - **Comments**
 - **Owner:** The owner is responsible for mitigating the risk, if needed
 - **Related to Risks:** Risks that this risk depends on
 - **Classification:** For example, business, technical, or organizational
 - **Root Cause**
 - **Trigger:** What might trigger the risk to occur
 - **Approach:** How to handle the risk: mitigate, watch, or accept
 - **Probability**
 - **Consequence**
 - **Mitigation Strategy:** The strategy to mitigate the risk

- **Due Date:** The date by when the risk must be mitigated
 - **Fallback Plan:** The plan for what to do if the mitigation strategy fails
- c. Click **OK**.
5. Add three business needs:
- a. Click **Add > Business Need**.
 - b. Enter the following information about the business need:
 - **Title**
 - **Description**
 - **Projects:** The project to which the business need is related
 - c. Click **OK**.
 - d. Repeat steps a-c to create two more business needs.
6. Click **Display > Create Business Case for Projects**.
7. Select the project.
8. For the Financials attribute, click **To Time Grid Editor**. The financials sheets open.
9. In the Plan – High, Plan – Likely, and Plan – Low sheets, enter the planned financial numbers. Double-click the cells to edit them. You can also enter the financial numbers by using the graphical editor:
- a. Click **Menu > Investment Analysis**.
 - b. To enter the financial numbers for each quarter, click the chart or use the tables under the graph.
 - c. Click the **NPV Probability** tab to review the probability curve for the net present value probability.
10. Click **Save**, and then click **Close**.

11. Under Transitions, click **Ready for approval decision**.

Lesson 6: Approve and prioritize projects

Prerequisites

- You must be logged in as an administrator, and must be able to log in as a steering committee user.
- You must have completed lessons 1 through 5.

Purpose

Approve project business cases, prioritize and analyze project proposals, and select the project proposals that provide the most value to the least cost and risk.

About this lesson

In this lesson, you create a project that is in the Ready for Prio state, and then create three projects that are also in that state so that you can compare them. When you add the projects, you will use a shortcut by adding them directly from a module instead of specifying the attribute values on the Project Proposal form. Use this shortcut only for the purposes of this lesson.

Instructions

1. In the IT portfolio management workspace, click **Modules > Projects**.
2. Add four projects:
 - a. Click **Add Project**.
 - b. Enter the following information:
 - **Title**
 - **Project State:** Select **Ready for Prio**
 - **Proposal Owner**
 - **IT analyst**

- c. Click **OK**.
3. Log in as a steering committee user.
4. In the IT portfolio management workspace, click **Display > Project Business Cases To Approve**.
5. Select the project.
6. Review the project and click **Ready for prio** to approve the business case.
7. Click **OK**.
8. Click **Prioritize > Strategic Alignment – Projects**. A pair of project proposals is displayed. A question is displayed above the project proposals.
9. Answer the question by selecting a score on the comparison scale and clicking **OK**.

Use the comparison scale to determine the relative importance of the two project proposals according to the selected criterion. The radio buttons correspond to the comparisons. When the projects fulfill the criterion to the same extent, select the radio button in the middle. However, when possible, score one project higher than another.

10. Continue comparing project proposals until the number of completed comparisons is equal to or greater than the number of recommended comparisons.
11. From the **Criterion** list, select the next strategic objective and prioritize the projects against that criterion. Continue the comparisons until you have compared the project proposals against all the strategic objectives in the **Criterion** list.
12. Click **Prioritize > Value Analysis – Project Proposals**. The question above the project proposals is about business value rather than strategic objectives.
13. Select the scores and compare until the number of completed comparisons is equal to or greater than the number of recommended comparisons.
14. Click **Visualize > Strategic Alignment – Projects**.
15. Click the **Stacked XY chart** icon to view the result of the prioritization against the strategic objectives.

This chart shows all projects in the **Ready for prio** state and their alignment with the strategic objectives. The projects at the top of the list are the most aligned with the objectives. The projects at the bottom are least aligned with the objectives.

16. Click **Visualize > Value Analysis – Project Proposals**.

17. Click the **Stacked XY chart** icon.

This chart includes information about the following criteria:

- **Risk:** The total risk core for the project. This value is automatically retrieved from the project.
- **Expenses:** This value is automatically retrieved from the project and is based on one of the following calculations:
 - The estimated total cost for projects without business cases
 - From the Plan – Likely sheet, the sum of the expenditures for projects with business cases
- **Business Value:** The result of the prioritization against the business value criterion
- **Feasibility:** The result of the score for Business Feasibility multiplied by the score for Technical Feasibility. This value is automatically retrieved from the project.
- **Financial Benefits:** From the Plan – Likely sheet, the sum of the benefits for projects that have business cases. This value is automatically retrieved from the project.
- **Strategic Objectives:** The result of the prioritization against the strategic objectives. The result of the previous chart, Strategic Alignment – Projects, is summarized in this chart.

In this lesson, the project proposal uses bars to indicate the criteria. However, because you created the proposals by using a shortcut and did not enter all of the values, not all of the criteria are indicated by bars. If you follow the complete process to create and prioritize projects, this chart will show complete bars for all of the criteria.

You can measure both qualitative criteria, through pairwise comparisons, and quantitative criteria, which are values retrieved from projects. Examples of quantitative criteria include cost, risks, and feasibility scores. You can also weight criteria.

18. In the chart, clear the bottom two project proposals. The criteria bars in the upper-right corner are updated to display how much the selected project proposals fulfill each criterion.

19. Right-click the chart and select **Rank The Elements**.

20. From the **Attribute** list, select **Priority**.

21. Click **OK** to save the ranking. The Priority attribute for each project proposal in the chart is populated with a ranking score that is relative to the other project proposals.

22. Click the project that you have been using in this lesson.

23. From the **Project State** list, select **Pre-plan project** and click the save icon.

Lesson 7: Pre-plan projects

Prerequisites

- You must be logged in as an administrator and must be able to log in as a PMO user.
- You must have completed lessons 1 through 6.

Purpose

Create a pre-plan for a project proposal. To create the pre-plan, you refine the project scope and define the resource demand and schedule.

Instructions

1. In the IT portfolio management workspace, click **Modules > Resource Pools**.
2. Click **Add Resource Pool**.
3. Enter the following information about the resource pool:
 - **Title**
 - **Start Date:** The start of the interval in which the resources from this pool are available
 - **End Date:** The end of the interval in which the resources from this pool are available
4. Click **OK**.
5. For the Resources attribute, click **To Time Grid editor**.
6. Enter the number of hours that are available for each resource profile per month.
7. Click **Save**, and click **Close**.
8. Log in as a PMO user.
9. In the IT portfolio management workspace, click **Display > Business Needs**.

10. Select a business need that is associated with the project.

11. Update the attributes:

- **State:** Select **Planned**
- **Target Start Date:** The target start date to implement the business need
- **Target End Date:** The target end date to implement the business need
- **Estimated Effort:** The estimated number of hours to implement the business need
- **Technology Risk**
- **Quality Risk**
- **Cost Risk**
- **Schedule Risk**

Business needs also have planned and actual start and end dates, which reflect the status of the project. Those dates are updated by the PMO users or project managers.

If you use Rational Focal Point with a Collaborative Lifecycle Management (CLM) system, you can retrieve the following values from the CLM system:

- Planned effort
- Actual effort
- Work item state
- Completeness (%)

Otherwise, the PMO users or project managers can update those attributes manually.

12. Click **Display > Project Pre-Planning**.

13. Select the project.

14. Scroll to the Scope section to see the business needs that are associated with the project.
15. Click **Resource Management**.
16. For the Resources attribute, click **To Time Grid editor**.
17. Enter the number of hours that each resource profile must be available to work on the project, and months in which they must work.
18. Click **Save**, and click **Close**.
19. Click **Scheduling**.
20. Enter the target dates:
 - **Target Start Date:** The date when the project is to start
 - **Target Implementation Date:** The date when the implementation of the project is to be complete
 - **Target End Date:** The date when the testing of the project is to be complete
 - **Target Delivery Date:** The date when the project is to be delivered
21. Under Transitions, click **Ready for implementation approval**.

Lesson 8: Approve projects for implementation

Prerequisites

- You must be logged in as a steering committee user.
- You must have completed lessons 1 through 7.

Purpose

Review the project pre-plan, including the capacity assessment and project road map, and approve the project for implementation.

Instructions

1. In the IT portfolio management workspace, click **Display > Projects to Approve for Implementation**.
2. Select the project.
3. Review the financials, scope, resource demand, and schedule.
4. For the Resources attribute, click **To Time Grid editor**.
5. Select **Sum all**. The demand for all projects to approve is displayed.
6. Click **Home**.
7. In the Total Supply, Total Demand Pipeline Projects, and Total Demand Existing Projects frames, review the resources to ensure that the supply is sufficient for the demand.
 - **Total Supply**: Contains the sum of all resource pools per resource profile and month. Make sure that this value is large enough to support both existing and pipeline projects.
 - **Total Demand Pipeline Projects**: Contains the sum of the demand for projects in the following states: Pre-plan project or Ready for implementation approval.

- **Total Demand Existing Projects:** Contains the sum of the demand for projects in the following states: Approved for implementation or Delivered.
8. Click **Display > Project Roadmap**.
 9. Click the **Gantt chart** icon. This view displays delivered and ongoing projects as well as projects that are ready to be approved.
 10. From the **Group By** list, select **Portfolio**.
 11. Under **Dates**, select these attributes:
 - **Target Start Date**
 - **Target Implementation Date**
 - **Target End Date**
 - **Target Delivery Date**
 12. Under **Display Links**, select these attributes:
 - **Risks**
 - **Business Needs**
 13. Under **Dates**, for the business needs, select these attributes:
 - **Target Start Date**
 - **Target End Date**

The data that the Gantt chart displays depends on what you select in the Display Links and Dates sections and from the **Group By** list. Depending on your situation, you might want to display different information.

The time line above the project bars in the chart shows dates. You can also see the related business needs. The length of the bars represents the target start and end dates for the business needs. The related risks are also displayed.

You can adjust the relative size of the chart and histogram by dragging the bar between the chart area and the histogram area.

14. In the **Histogram** tab, click **Settings**.
15. In the **Value Type** list, select **Time Grids**.
16. Expand **Resources**. Clear all check boxes in the **Allocated Resources** column, and select all check boxes in the **Demand** column, that is Developer, Tester, Project Manager, Technical Writer, and Designer.
17. For the **Threshold Settings**, specify these settings:
 - **View:** Select **Threshold Values – Gantt**
 - **Attribute:** Select **Resources**
 - **Time Grid Sheet:** Select **Supply**
 - **Time Grid Row:** Select **Total**
18. Click **OK**.
19. In the **Histogram** tab, select the check box **Show Threshold**.

A threshold line for the total supply resources is displayed with a histogram of the total demand resources. The threshold line indicates whether the projects must be rescheduled because of the availability of resources.
20. Click **Display > Projects to Approve for Implementation**.
21. Select a project.
22. Under Transitions, click **Approve for Implementation**.

Lesson 9: Allocate resources

Prerequisites

- You must be logged in as a PMO user.
- You must have completed lessons 1 through 8.

Purpose

Allocate resources to work on approved projects.

Instructions

1. In the IT portfolio management workspace, allocate resources from the resource pool to the approved project by clicking **Add > Resource Allocation**. An add page is displayed.
2. Enter the following information about the resource allocation:
 - **Project**
 - **Resource Pool** – Select a resource pool from which to demand resources
 - **Approver**: The user who must approve the allocation of the resources to the project. Because the approver is selected from the PMO, select the user that you are currently logged in as.
3. Click **OK**.

To use resources from more than one team, add another resource allocation.
4. Click **Display > Resource Allocations**.
5. Select the allocation that you created.
6. For the Allocated Resources attribute, click **To Time Grid editor**.
7. Enter the month and the number of hours that each resource profile is to be allocated to the project.
8. Click **Save**, and click **Close**.

9. Click **Home**.
10. In the Allocations to Approve section, click the allocations to approve.
11. For the State attribute, change the status from Pending to Approved and save the change.
12. Close the allocation.
13. Click **Display > Approved Projects**.
14. Select the approved project.
15. Display the Resource Management section. You can view these attributes:
 - **Allocations:** The allocations to the project
 - **Non-Approved Allocations attribute:** Allocations that are not approved
 - **Total Resource Cost:** The cost of the allocated resources based on the rate for each resource profile.
16. To display rates, click **Display > Resource Profile Rates**.

Lesson 10: Integrate with a CLM system

Prerequisites

- You must be logged in as a PMO user.
- You must have completed lessons 1 through 9.

Purpose

Export a project to a Change and Configuration Management application in a Collaborative Lifecycle Management (CLM) system.

Instructions

1. In the IT portfolio management workspace, click **Display > Approved Projects**.
2. Select the project to export to the CLM system.
3. Click the **Create project** icon.
4. Select the server for the CLM system.
5. Click **Log In**. If you are already logged in, you are not prompted with the login page.
6. Specify the process template, work item type, and owner.
7. Click **Create**. The project is exported to the CLM system. Wait for the export to finish.
8. After the export, click **Display > Projects Under Implementation**. All projects that were exported to the CLM system are displayed. A link to the project in the CLM system is displayed in the Link to Implementation Project attribute.
9. Click **Display > Business Needs**.
10. Select a business need that is related to the project.

11. Display the Links section. The business needs that are related to the project were transferred to the CLM system and the link is displayed in the Work Items attribute.
12. Hover your cursor over the work item link. A window with details about the work item opens.

Lesson 11: Monitor project implementation

Prerequisites

- You must be logged in as a PMO user and must be able to log in as a steering committee user.
- Before you update the project in Rational Focal Point with information from the CLM system, take a snapshot in the CLM system. You must take a snapshot each time you update the project in Rational Focal Point.
- You must have completed lessons 1 through 11.

Purpose

Monitor the progress of the project implementation.

Instructions

1. Update the project in Rational Focal Point and the CLM system:
 - a In the IT portfolio management workspace, click **Display > Projects Under Implementation**. The projects that were exported to the CLM system are displayed.
 - b Click the **Update project** icon.
 - c Log in to the CLM system server.
 - d Update the project. These attributes are updated:
 - Completeness (%)
 - Total Planned Effort
 - Total Actual Effort
 - Planned Start Date
 - Actual Start Date

- Planned End Date
 - Actual End Date
 - Snapshot Date
- e Click a business need in the Business Needs attribute. These attributes are updated:
- Work Item State
 - Completeness (%)
 - Planned Start Date
 - Actual Start Date
 - Planned End Date
 - Actual End Date
 - Snapshot Date
 - Planned Effort
 - Actual Effort
2. Monitor the progress of projects in the portfolio:
- a Log in as a steering committee user.
 - b In the IT portfolio management workspace, click **Display > Projects (r/-)**.
 - c From the filter list, select **Business Overview Ongoing Projects**.
 - d In the toolbar, click the **Table** icon. The projects that are currently being implemented are shown. You can review the progress of projects from different perspectives by selecting different filters.
 - e Click **Home**. On the home page, the steering committee can monitor progress of the portfolios and projects:

- **Portfolio Health:** This section contains warnings, the net cash flow for delivered projects, the accumulated investments, and the total mean net present value for ongoing projects.
- **Portfolio Financials:** This section contains the net cash flow for existing or ongoing projects in each portfolio.
- **Project Distribution: State:** This section contains a statistical view of the distribution of the projects according to their state.

3. Deliver the project:

- a Log in as a PMO user.
- b In the IT portfolio management workspace, click **Display > Projects Under Implementation**.
- c Under Transitions, click **Deliver**.
- d Click **OK**. The project is delivered.

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