

FOCAL POINT УПРАВЛЕНИЕ ИТ ПОРТФЕЛЕМ

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SIBiS
ПАРТНЕРСТВО РАДИ УСПЕХА

Обычные ситуации в бизнесе

- Отсутствие контроля/надзора за деятельностью в организации и понимания какие виды деятельности являются наиболее важными
- Отсутствие общего хранилища информации о проектах
- Длительность сбора обзоров и других важных данных о портфеле проектов
- Сложность в нахождении хорошей ситуации по ресурсам
- Трудности в понимании взаимосвязей и отношений между проектами, программами, портфелям, отдельными мероприятиями, рисками, бизнес потребностями и т.д
- Трудности в эффективном определении приоритетности проекта (Каков оптимальный выбор проектов портфеля, которые максимизируют его значение по отношению к стоимости?)



Обычные вопросы бизнеса

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- У Вас много предложений по проектам?
- Имеются ли конфликтующие приоритеты?
- У Вас ограниченные ресурсы?
- Стоит вопрос: какой оптимальный выбор проектов для портфеля максимизирует отдачу при минимальной стоимости?
- Есть ли у Вас уверенность, что все что Вы делаете правильно?
- Если выбрать один проект вместо этих двух, какой результат мы получим для бизнеса?
- У Вас слишком мало / слишком много информации
- Уверены ли Вы, что правильная информация попадает правильному сотруднику в правильное время?



Пример:

Реальные требования бизнеса.

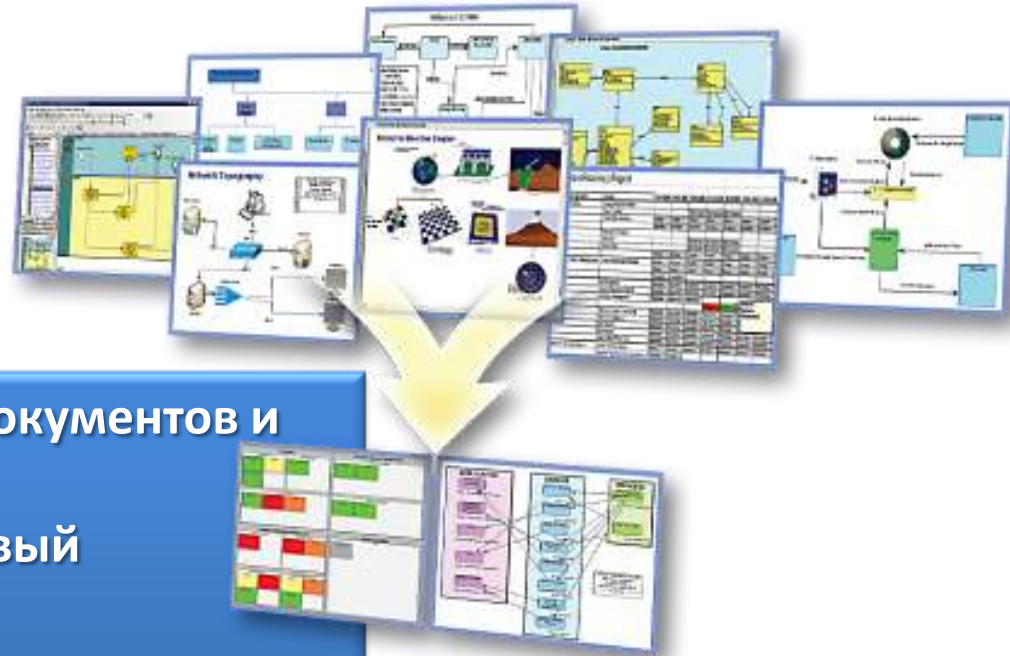
1. Все предложения по проектам должны иметь одинаковый шаблон с фокусом на бизнесе, а не на технологиях
2. Все предложения по проектам должны быть в единой базе данных
3. Должна присутствовать возможность анализа всей информации по проектам в нескольких измерениях
4. Быстрый и эффективный ответ на все предложения по проектам, обоснованный измерениями
5. Портфель проектов должен следовать бизнес правилам
6. Поддержка рабочего процесса
7. Правильная информация правильному пользователю в правильное время
8. Приоритезация и анализ баланса
9. Поддержка выявления ценностей
10. Возможность поиска «узкого места» в процессах



От хаоса к порядку.

Концентрация информации для достижения успеха.

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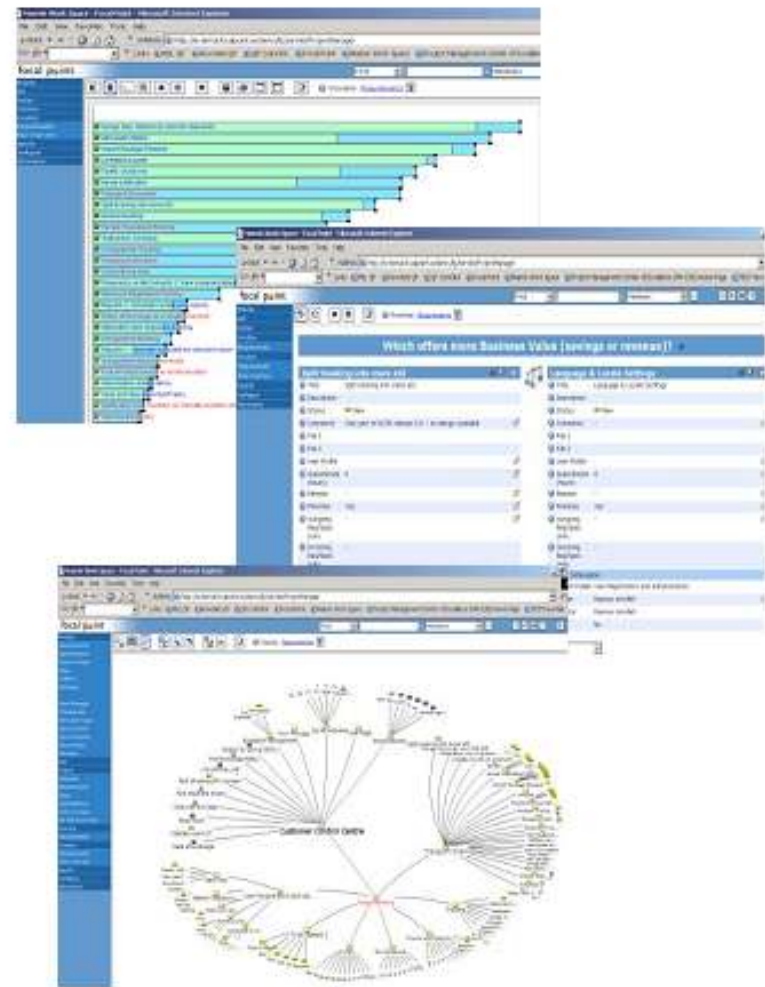


- Избежание хаоса из таблиц, документов и e-mail
- Стандартизация запроса на новый проект
- Легкие ответы на такие вопросы как:
 - Какие проекты запущены?
 - Какие новые проекты рассматриваются?
 - Кто запрашивает проект и почему?

Focal Point-инструмент принятия решений

SIBIS
ПАРТНЕРСТВО РАДИ УСПЕХА

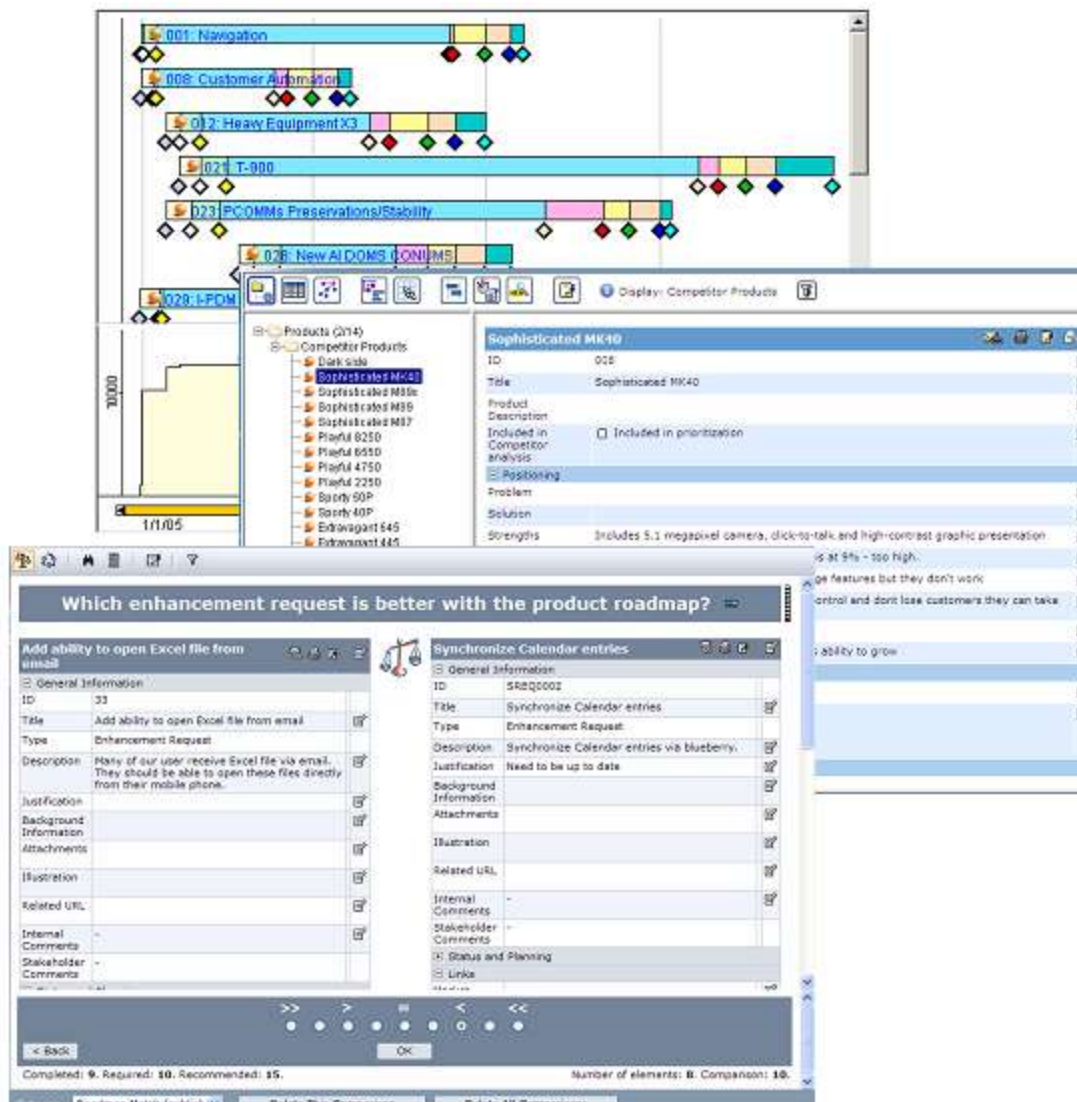
- 100% веб интерфейс
- Высокая гибкость - настройка без программирования является частью стандартной поставки продукта
- Методы и рабочий процесс приспособлены к вашему проекту / продукту – а не наоборот
- Удобный графический интерфейс
- Настроенный согласно ролей
- Эффективная приоритезация
- Нисходящий подход
- Поддержка SaaS (Software as a Service, ASP)



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Focal Point-инструмент принятия решений

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ПАРТНЕРСТВО РАДИ УСПЕХА



- Простота
- Принятие решений на базе значений данных
- Гибкость
- Сотрудничество
- Наглядность
- Поддерживающий процесс
- Кастомизация
- Быстрое внедрение
- Включи и работай
- Скорость обучения
- И т.д.

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Импорт имеющейся информации

Import Elements From Excel to work space "Mobile Phones" and module "Features"

In the first row, select which attributes to send the values to.
In the second column, select which elements to include.

Create new elements
 Update existing elements

Use the attribute to identify the elements
If there is no matching attribute value,

The Excel spreadsheet contains formulas. In this frame, the result of the formulas (i.e. not the formulas themselves) are displayed. Formula cells have yellow backgrounds.

	Title	Description	Customers	Gaps	Link to
Feature 1:	<input type="checkbox"/> Title	Description	Customers	Gaps	Link to
Feature 2:	<input checked="" type="checkbox"/> WAP		Acme, Inc.		
Feature 3:	<input checked="" type="checkbox"/> GPS	GPS navigation	Acme, Inc.	Features	Feat31
Feature 4:	<input checked="" type="checkbox"/> Low weight	My jacket looks silly when mobile phone is in the pocket. Lower size and lower weight!			Feat42 Feat21 Feat17

Import Cancel



- Импорт из Excel
- Импорт из инструментов, поддерживающих CSV формат
- Мапирование информации в атрибуты Focal Point
- Быстрый старт

Каждой роли – своя панель управления

Focal Point™ Workspaces | Home | Preferences | Search | Help | Logout

Add
Display

- Market Problems
- Marketing Plans
- Personas
- Customers
- Competitors
- Win / Losses
- Updated Win/Loss Rep
- Our Products
- Competitor Products
- Releases
- ERs
- MREQs
- SREQs
- SREQs to Estimate an
- TREQs
- Qualities
- Market Segments
- Target Market Segme

Review
Prioritize
Visualize
Information

Process Reset sorting

Process



Win/loss reports that have been updated d
30 days

Title	Customer	Status	Our Product	Com
ZorroFone 2007-10-04	ZorroFone	Win	Gizmo G900	Sc Mi
Kime Telecom 2007-10-04	Kime Telecom	Loss	Gizmo G900	Sc Mi
Stevens Wireless 2007-10-12	Stevens Wireless	Win	Gizmo G900	Ex 44 Sc Mi

SREQs per Customer

Customers	Quantity	Share
-	32	32,3%
eVoice	20	20,2%
Ez Electronics	24	24,2%
Fingerprint	27	27,3%
General Telephone	14	14,1%
Horizon Wireless	23	23,2%
Kime Telecom	1	1,0%
Norfone	29	29,3%
Nostra Networks	10	10,1%
Plural Wireless	8	8,1%
Quality Communication Corp.	38	38,4%
SBC Comm	14	14,1%
SKH Telecommunications	12	12,1%
Spring Telecomm	15	15,2%
Stevens Wireless	20	20,2%
Wireless Mobile Devices	1	1,0%
ZorroFone	1	1,0%

Ongoing releases

Title	Target Start Date	Release Date	Status
Gizmo G971x	2006-06-17	2007-06-16	Started
Gizmo G811	2005-12-28	2006-12-15	Completed
Gizmo G890	2007-01-20	2007-10-31	Started

Welcome to Focus on Product Management Reset sorting

- Конфигурирование панелей управления – каждый видит то, что ему нужно (можно) видеть.
- Панели интерактивны – можно детально рассмотреть каждый элемент контента.

Управление проектами - контроль исполнения, on-line мониторинг, метрики

- Отображение любой статусной и метрической информации
- Подстройка панели управления под себя: кастомизация вида домашней страницы для каждой роли
- Текущий контроль за выполнением релиза в реальном времени:
 - Ранее обнаружение проблем
 - Повышение предсказуемости результатов

Product Management Demo (version 4.6.5) - Focal Point - Microsoft Internet Explorer

File Edit View Favorites Tools Help

focal point

Find [] in Customers [Go]

Cost vs Budget

Title	Actual Cost for Release	Estimated Cost for Release
Gizmo G770	0	0
Gizmo G771x	0	628
Gizmo G801	5,464	8,293
Gizmo G890	0	0
Gizmo GZ90	0	0

Status of All User Requirements

Status	Quantity	Share
new New	4	8.2%
Accepted for Market Prioritiza...	0	0.0%
Accepted for Costing	2	4.1%
Accepted for Prioritization	22	44.9%
Accepted for Planning	0	0.0%
Planned	11	22.4%
Implemented	3	6.1%
Verified/Completed	2	4.1%
Clarification Needed	3	6.1%
Duplicate	0	0.0%
Postponed	2	4.1%
Rejected	0	0.0%
Sum:	49	

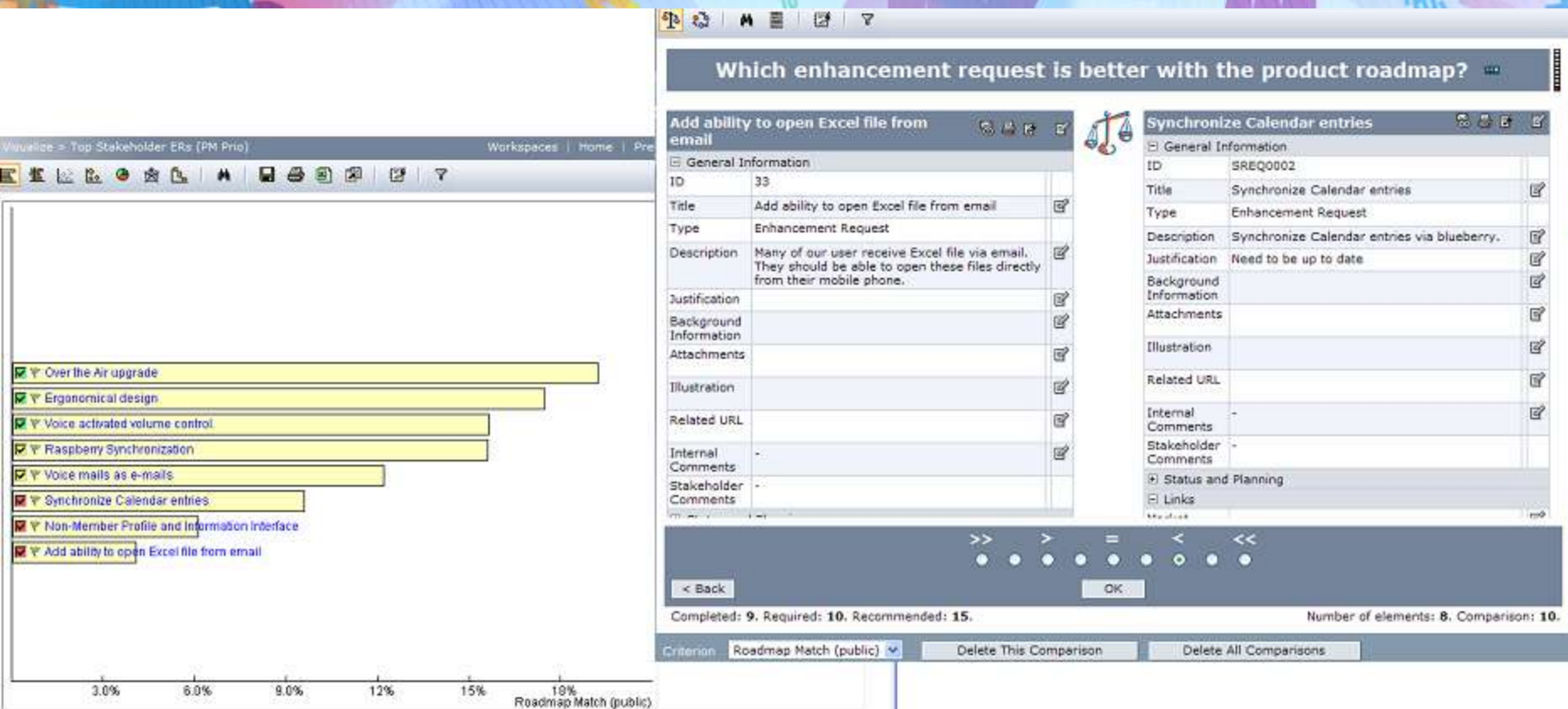
Status All System Requirements

Status	Quantity	Share
new New	2	14.3%
Reviewed	2	14.3%
Implemented	2	14.3%
Verified/Completed	8	57.1%
Clarification Needed	0	0.0%

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Internet

Прозрачность в определении лучших проектов

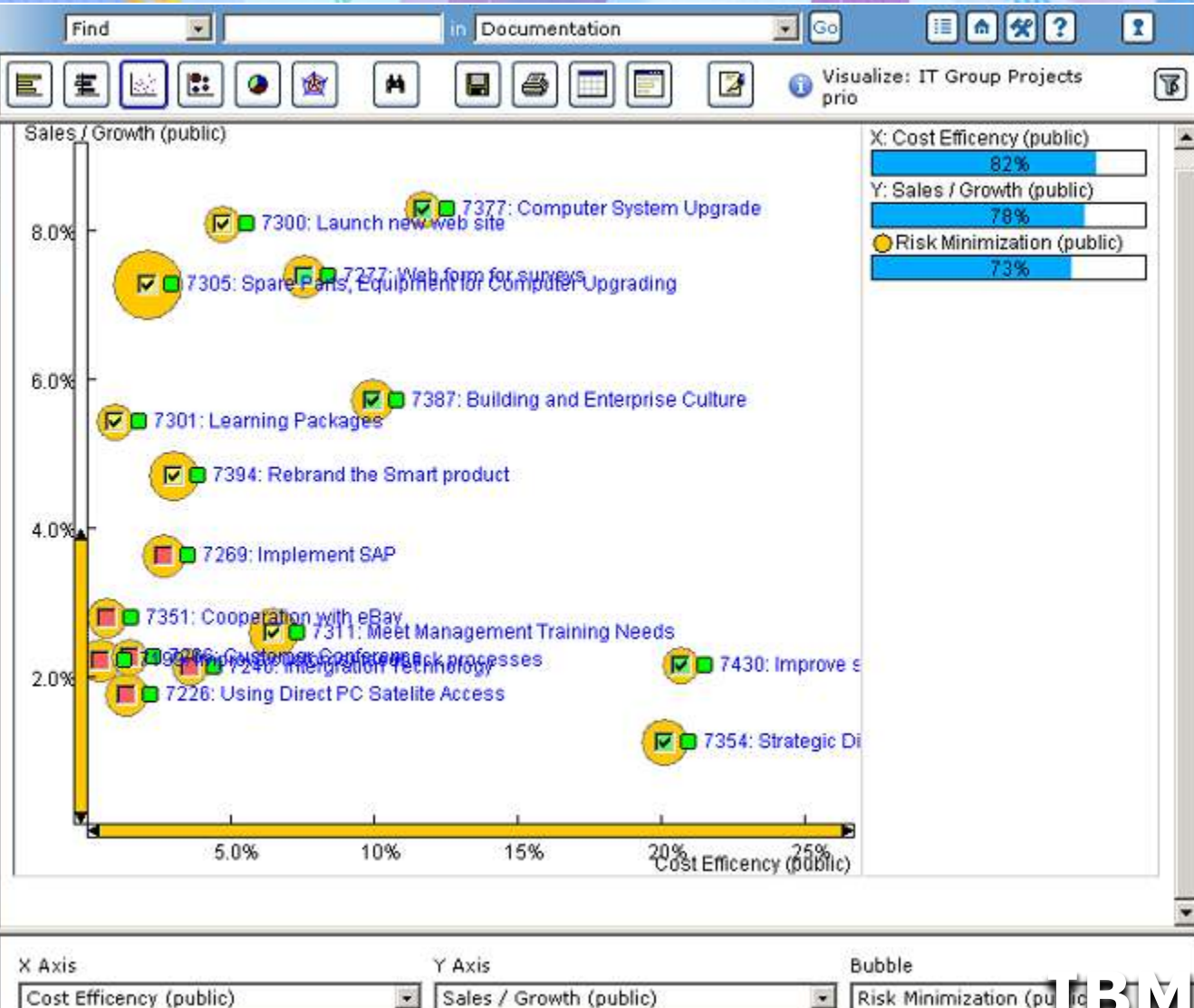


- Заказчики или лица, принимающие решения, вместе с другими голосуют за ценность каждой конкретной характеристики или конкретного проекта
- Focal Point лишь обобщает результаты голосования и визуализирует отчет о свойствах проекта-победителя.

Приоритезация и визуализация: затраты против преимуществ

focal point

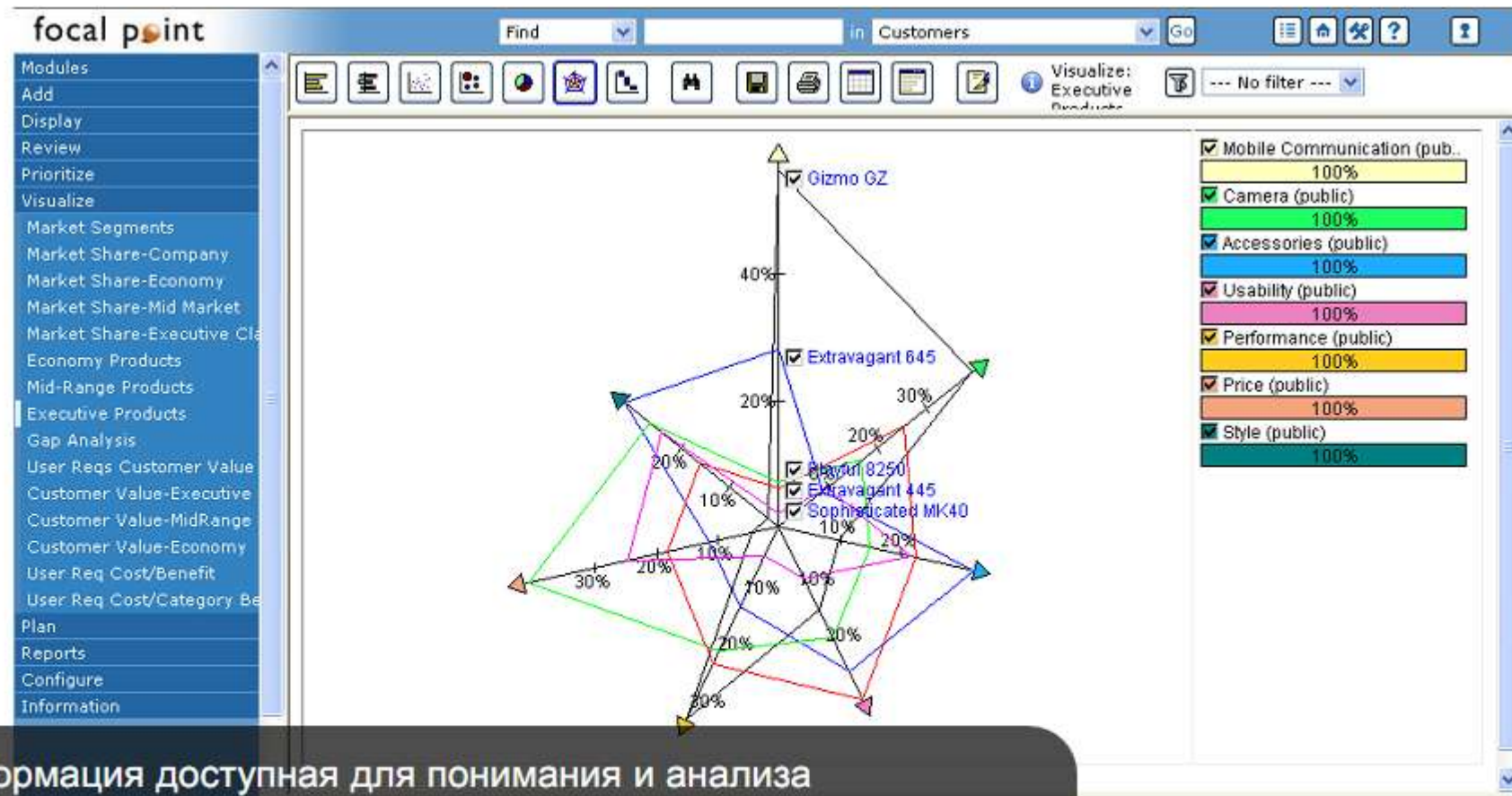
Modules
Add
Display
Prioritize
Visualize
Reports
Configure
Information



- При лимите бюджета - реализация какого проекта дает наибольший эффект

- Выбор наиболее приоритетных направлений стратегии

Визуальный анализ: анализ конкурирующих портфелей проектов



- Информация доступная для понимания и анализа
- Анализ нескольких портфелей проектов по множественным критериям
- Выбор наиболее приоритетных направлений вашей стратегии

Взвешенный подход

Focal Point™

Workspaces | Home | Preferences | Search | Help | Logout

- Modules
- Add
- Display
- Review
- Prioritize
- Visualize
- Reports
- Configure
- Members
- Information
- Advanced

Resource Distribution		
Primary Skill	Quantity	Share
DBA	12	22.6%
IT Infrastructure	6	11.3%
Network Engineer	4	7.5%
Systems Engineer	3	5.7%
Java	2	3.8%
C++	2	3.8%
C# / .NET	2	3.8%
Windows Server	5	9.4%
Linux Server	4	7.5%
Sun Server	2	3.8%
Windows Desktop	2	3.8%
Citrix	5	9.4%
SQL	2	3.8%
Active Directory / LDAP	2	3.8%
Sum: 53		

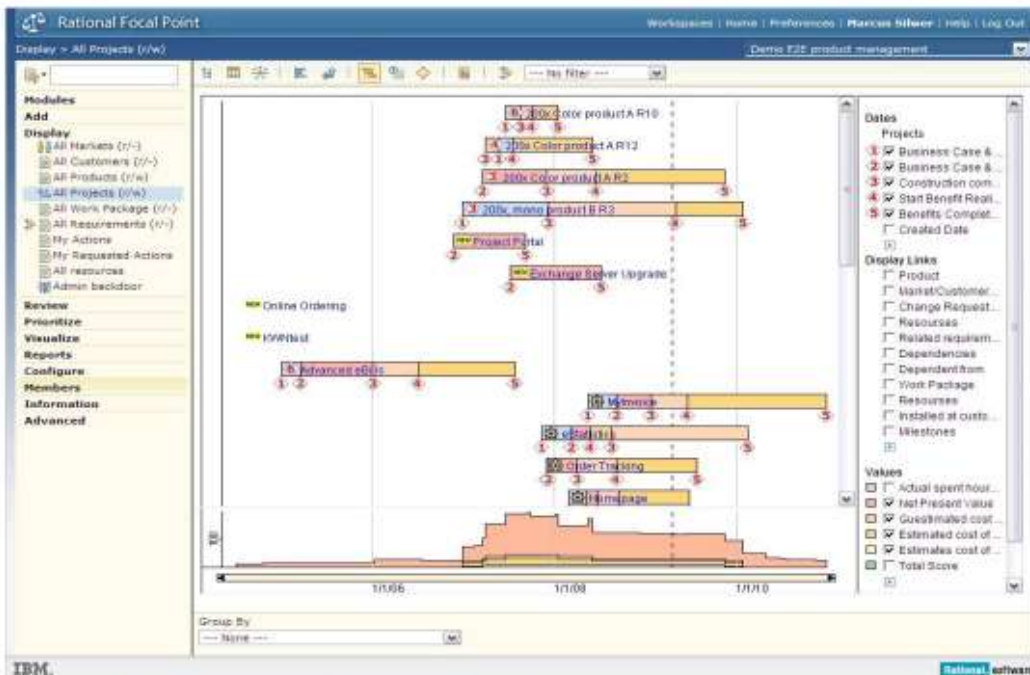
Оценка рисков

- Рыночные риски
- Технологические риски
- Бизнес риски

View											Reset sorting
Title	Sponsor	Duration (Weeks)	Business Case Agreed	Start Date	Project Risk Rating	Company Values	Business Objectives	Benefits	Benefit Risk	Risk	Status
010:Share trading telephone service upgrade	Simon Vaughan	18weeks	3/25/07	5/7/07	⚠ N/A	<ul style="list-style-type: none"> ★ Cost efficient systems and processes ★ Easy to do business with ★ Being excellent at communications ★ Putting our customers first 	-	<ul style="list-style-type: none"> 🟢 New Income 	<ul style="list-style-type: none"> ⚠ N/A 	<ul style="list-style-type: none"> 🔻008:Business process changes involved 🔻007:Staff impacted 	🟢 In Progress
009:Introduce new Child Savings Account (NCSA) based on Child Trust Fund	-	25weeks	3/26/07	5/18/07	⚠ N/A	<ul style="list-style-type: none"> ★ Cost efficient systems and processes ★ Easy to do business with 	-	<ul style="list-style-type: none"> 🟢 New Income 	<ul style="list-style-type: none"> ⚠ N/A 	-	🟢 In Progress
007:Outbound call campaign to promote range of savings products	Gary Morgan	25weeks	3/26/07	5/12/07	⚠ N/A	<ul style="list-style-type: none"> ★ Encouragement of Saving 	-	<ul style="list-style-type: none"> 🟡 Additional income 	<ul style="list-style-type: none"> ⚠ N/A 	-	🟢 In Progress
006:PSA Reporting Regulations	Simon Vaughan	25weeks	5/3/07	4/17/07	🟢 Low	<ul style="list-style-type: none"> ★ Minimise compliance breaches 	-	<ul style="list-style-type: none"> 🟡 Cost Avoidance 	<ul style="list-style-type: none"> 🔴 High 	<ul style="list-style-type: none"> 🔻004:Stakeholder buy-in 🔻003:Mission Critical 	🟢 In Progress
005:Database cleanse	Gary Morgan	25weeks	3/23/07	3/29/07	🔴 High	<ul style="list-style-type: none"> ★ Minimise compliance breaches ★ Cost efficient systems and processes 	-	<ul style="list-style-type: none"> 🟡 Cost Avoidance 	<ul style="list-style-type: none"> 🟡 Medium 🔴 High 	<ul style="list-style-type: none"> 🔻013:Organisational resource 🔻012:Supplier capability 	🟢 In Progress
004:Upgrade call centre systems	Bob Slade	15weeks	3/10/07	4/1/07	🟢 Low	<ul style="list-style-type: none"> ★ Cost efficient systems and processes ★ People Development ★ Customer satisfaction with employee performance 	-	<ul style="list-style-type: none"> 🟡 Cost Avoidance 	<ul style="list-style-type: none"> 🟡 Medium 	-	🟢 In Progress
003:Call Centre refurbishment	Bob Slade	25weeks	4/13/07	4/23/07	🟢 Low	<ul style="list-style-type: none"> ★ Easy to do business with ★ Being excellent at communications 	<ul style="list-style-type: none"> 🟢 Competitive response 🟢 Competitive advantage 	<ul style="list-style-type: none"> 🟡 Cost Avoidance 	<ul style="list-style-type: none"> 🟡 Medium 🔴 High 	<ul style="list-style-type: none"> 🔻017:New Build Vs refurbishment 🔻016:Extent of assets to be managed 	🟢 In Progress

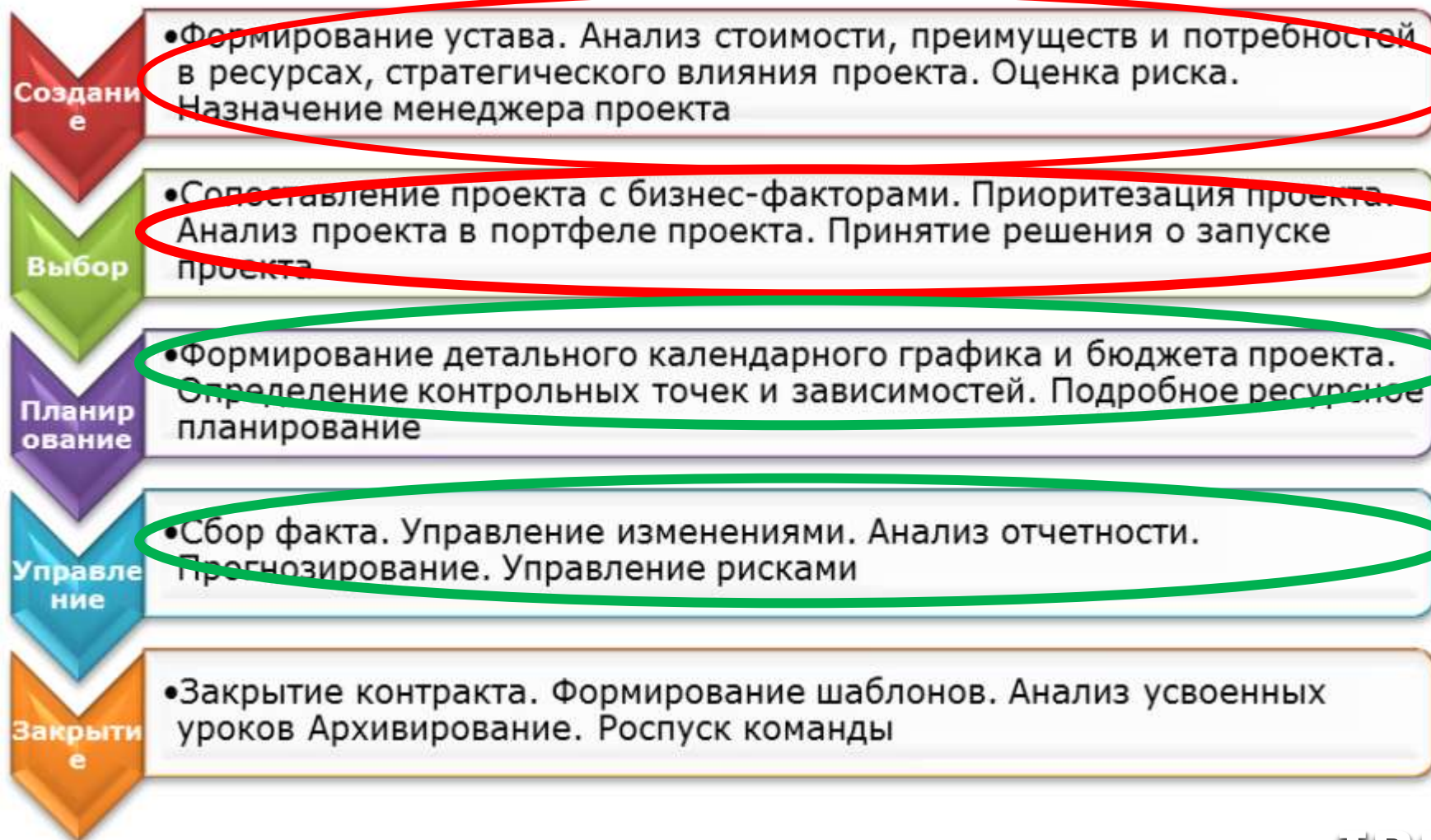


Мониторинг и обзор портфеля



- Обзор состояния в каждый момент времени
- Снижает необходимость в отчетности
- Быстрая смена приоритета или отмена неудачного проекта для снижения потерь
- Максимизация выгоды портфеля бизнеса в отношении к затратам

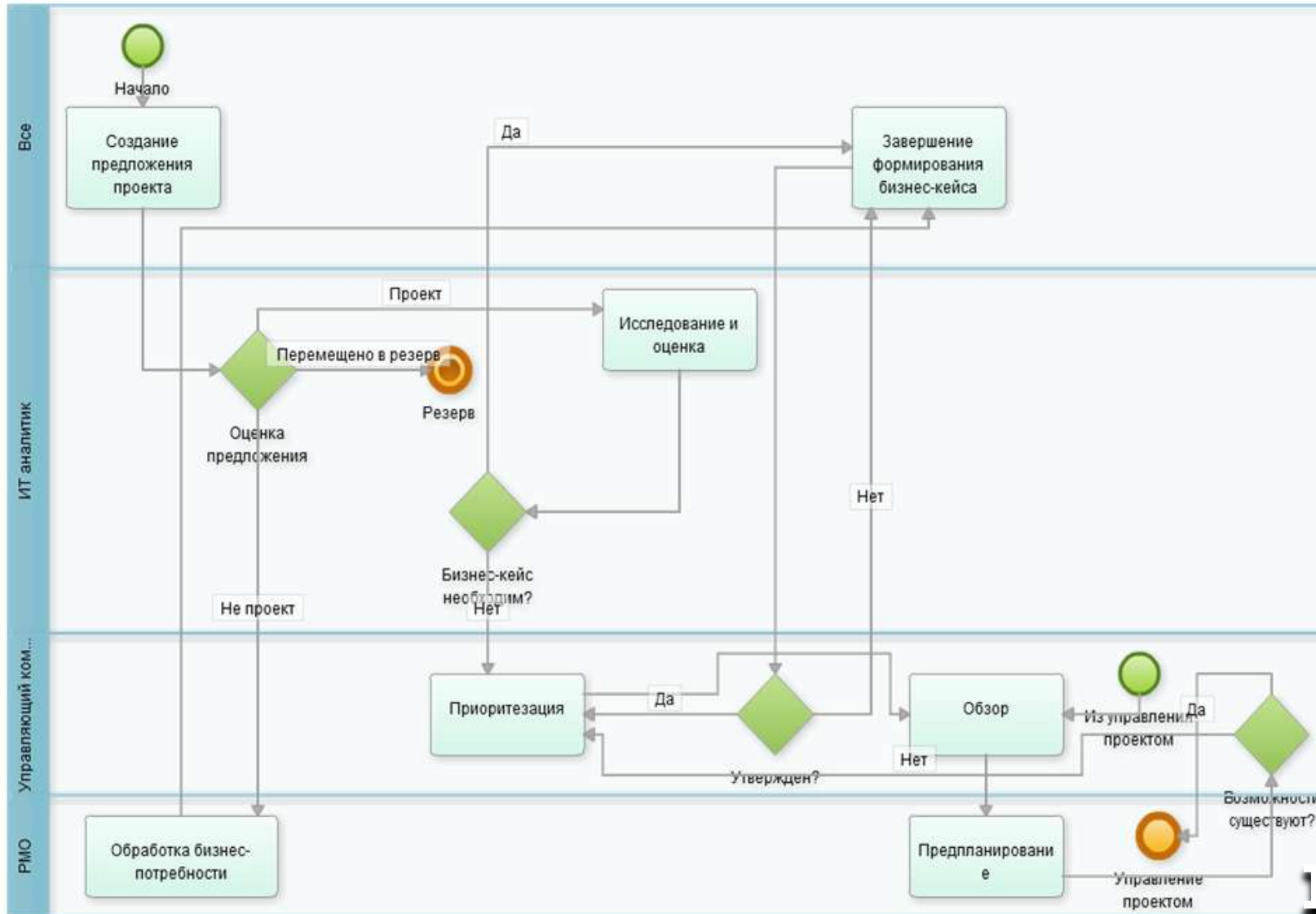
Этапы жизненного цикла проекта



Процесс управления портфелем проектов



IBM Rational Focal Point для управления портфелем IT проектов



Внесение предложения проекта

Rational Focal Point

Workspaces | Home | Preferences | Giulia | Help | Log Out

Add > Project Proposal

IT Portfolio Management Configuration

Enter information about the new Project, then click OK.

View to add project proposals.

Title: Enhancement of Fraud Detection Tool

Description: This project will do necessary upgrades to the fraud detection tool. We need real-time checks of risk factors. Automatic monitoring and alerts on suspect transactions is also important. Support for authentication of client data will be mandatory. In addition, the GUI needs a refresh and we also need to take a look at the access rights and user types.

Type: Strategic

Portfolio: Infrastructure

Submitter: Giulia Lookup

Business Units: BU2, BU3

Comments: We've seen how our current system has flaws that needs to be corrected in order to maintain high usability and value to our business.

- Добавить проектные предложения и связать их с портфелями, приложениями и стратегическими целями
- Найти свой проект предложений по проектам
- Перевести потенциальное предложение от проектного состояния до состояния предложения.

Внесение и принятие предложения проекта

Related Applications
Click To Add Link(s)

Related Projects
Click To Add Link(s)

Primary Strategic Objective

Project Objectives

Update the fraud detection system to latest technologies available.

Business Value

New technologies have occurred over the years. We need to be up to date in order to prevent frauds. That will in turn be good for us.

OK Cancel Add Multiple Projects

Rational Focal Point

Workspaces | Home | Preferences | Emma | Help | Log Out

Display > My Project Proposals To Assess

IT Portfolio Management Conf

Projects

Current State	Transitions
<input checked="" type="checkbox"/> Accepted	Start investigation

Enhancement of Fraud Detection Tool

General Information

ID	186
Title	Enhancement of Fraud Detection Tool
Description	This project will do necessary upgrades to the fraud detection tool. We need real-time checks of risk factors. Automatic monitoring and alerts on suspect transactions is also important. Support for authentication of client data will be mandatory. In addition, the GUI needs a refresh and we also need to take a look at the access rights and user types.
Type	Strategic
Portfolio	Infrastructure
Submitter	Giulia
IT Analyst	Emma
Business Units	BU3 BU2
Comments	Giulia 2009-09-29 14:44: We've seen how our current system has flaws that needs to be corrected in order to maintain high usability and value to our business.

- Принять или отклонить предложения по проектам, или сделать запрос на дополнительные разъяснения, отметить предложение как дублированное, отметить предложение как бизнес потребность, или переместить предложение в резерв.
- Добавить протокол совещания по проекту
- Назначить ИТ-аналитика для оценки проектного предложения

Оценка новых предложений

The screenshot displays the 'My Project Proposals To Assess' view in the IT Portfolio Management Configuration Add-On v1.1. A red oval highlights the 'Current State' and 'Transitions' section, which shows the project is currently 'Under investigation' and can transition to 'Create business case', 'Ready for prio', or 'Reject'. The project details include:

- Enhancement of Fraud Detection Tool**
- General Information:** ID: 002, Title: Enhancement of Fraud Detection Tool, Description: This project will do necessary upgrades to the fraud detection tool. We need real-time checks of risk factors. Automatic monitoring and alerts on suspect transactions is also important. Support for authentication of client data will be mandatory. In addition, the GUI needs a refresh and we also need to take a look at the access rights and user types.
- Type:** Strategic
- Portfolio:** Infrastructure
- Submitter:** Giulia
- IT Analyst:** Emma
- Business Units:** BU3, BU2
- Comments:** Giulia 2010-01-19 17:07: We've seen how our current system has flaws that need to be corrected in order to maintain high usability and value to our business. Emma 2010-01-19 17:08: I will take ownership of investigating the project proposal as it is within my area of expertise.
- Value Statements:**
 - Initial Estimations:**
 - Target Duration: 15 months
 - Total Project Cost: \$100 000 - \$500 000
 - Business Feasibility: 10 - Excellent
 - Technical Feasibility: 7 - Manageable
 - Time of Project Delivery: 2011
 - Scope Ideation:
 - Real time checks - risk factors and others
 - Alerts
 - Authentication
 - GUI updates
 - User interface improvements

Оценка новых предложений

Rational Focal Point

Workspaces | Home | Preferences | Emma | Help | Log Out

Add > Meeting Minutes

IT Portfolio Management Conf...

Enter information about the new Meeting Minutes, then click OK.

View to add meeting minutes.

Title (Default value is an expression)

Description

Acceptance of project proposal.

Approval Date 2009-09-29

Decision Type Project Proposal Acceptance
IT analyst approves new proposal as a project.

Attendees Emma
John

Click To Add Link(s)

Review Items Enhancement of Fraud Detection Tool

Attachments Size limit 10 MB

Browse

OK Cancel Add Multiple Meeting Minutes

➤ ИТ- аналитики могут также работать в команде, для принятия проектов

Создание бизнес-кейса проекта

Display > Create Business Case for Projects

IT Portfolio Management Conf

Projects

Current State **Transitions**

Finalize business case ☆ Ready for approval decision

Enhancement of Fraud Detection Tool

General Information

Links

Value Statements

Primary Strategic Objective ↑ Adapt to New Technologies

Project Objectives Update the fraud detection system to latest technologies available.

Business Value New technologies have appeared over the years. We need to stay up to date in order to prevent frauds. That will in turn save cost for us.

Problem

Solution

Financial Information

NPV \$0

IRR 0 %

ROI 0 %

Financials	Sheets	Time Span	Time Interval
Budget		2009 Q1 - 2014 Q4	Quarter
Planned		2009 Q1 - 2014 Q4	Quarter
Actual		2009 Q1 - 2014 Q4	Quarter

Add Project Proposal Add Business Need

➤ Обновление проблем и решений по проекту

Проектные риски

Enter information about the new Risk, then click OK.
A view to add project risks.

Add

- Project Risk
- Project Proposal
- Business Need

Display Information

General Information

Title: Lacking skills

Description: We might not have the skills among our resources that are experienced or familiar enough with the new technologies we need for this project.

Projects: Enhancement of Fraud Detection Tool

Attachments: Size limit 10 MB

Owner: Isaac

Related to Risks: Click To Add Link(s)

Risk Description

Classification: Technical Technology

Root Cause: We have not provided our developers and testers with enough training lately.

OK Cancel Add Multiple Risks

➤ Внесение описания и оценка рисков проекта

Бюджет проекта

The screenshot displays the Rational Focal Point interface for creating a business case. The main window shows a budget table for the project 'Enhancement of Fraud Detection Tool'. The table includes columns for quarters from 2010 Q2 to 2012 Q1 and rows for various financial categories like Expenditures, Benefits, and Net Cash Flow.

		2010 Q2	2010 Q3	2010 Q4	2011 Q1	2011 Q2	2011 Q3	2011 Q4	2012 Q1	2012 Q2
Expenditures	1	179300	93000	62000	45000	45000	0	0	0	0
Capital Expenditures	Σ 2	2300	19000	22000	5000	10000	0	0	0	0
Development	3	500	4000	2000	5000	10000				
Investments	4	1800	15000	20000	0	0				
Operational Expenditures	Σ 5	177000	74000	40000	40000	35000	0	0	0	0
Resource	6	2000	14000	40000	40000	35000				
Supplies	7	150000	45000							
R&D	8	25000	15000							
Benefits	Σ 9	300000	150000	0	0	85000	58000	40000	40000	40000
Cost Savings	10					45000	18000			
Cost Avoidance	11					40000	40000	40000	40000	
New Income	12	300000	150000							
Net Cash Flow	Σ 13	120700	57000	-62000	-45000	40000	58000	40000	40000	

Navigation buttons at the bottom include Save, Close, Import, Sum all, Edit with Financier, Budget, Planned, and Actual.

- Создать экономическое обоснование проекта
- Создание финансового бюджета на проект

Бизнес потребности

Add > Business Need IT Portfolio Management Configuration Add On v1.1

Enter information about the new Business Needs, then click OK.
View to add business needs.

Title*

Description*

Benefit Statement

Justification

Comments

OK Cancel Add Multiple Business Needs

➤ Бизнес потребности добавляются к экономическому обоснованию, чтобы сделать его проще для понимания масштабов и стоимости до принятия какого-либо решения.

Экономическое обоснование создано

IT Portfolio Management Configuration Add On v.1.1

Display > Create Business Case for Projects

Modules

Add

Display

- Create Business Case for Projects
- Project Pre-Planning
- Project Risks
- Strategic Objectives
- Portfolios
- Project Business Cases To
- Project Roadmap
- Project Balance
- Capacity Analysis
- Resources - Current Demand
- Projects to Approve for Impact
- Review Ongoing Projects (r/-)
- Projects(r/-)
- Stopped Projects
- Application Life
- Application Scorecard
- Risks
- Risk Scorecard - Project Level
- Business Units
- My Issues - Action Needed
- My Reported Portfolio Issues
- Open Portfolio Issues
- Change Requests to Approve
- Minutes for Meetings I Attend
- Meeting Minutes (r/-)
- Edit Internal Rate
- My Draft Project Proposals
- My Suggested Projects
- Delivered Projects
- Rejected Projects
- My Proposed Business Needs
- Classified Change Requests

Projects(1/3)

- Juno
- Mercury
- Enhancement of Fraud Detection

LINKS

Value Statements

Primary Strategic Objective: Adapt to New Technologies

Project Objectives: Update the fraud detection system to latest technologies available.

Business Value: New technologies have occurred over the years. We need to stay up to date in order to prevent frauds. That will in turn save cost for us.

Problem: We have on few occasions missed to detect some frauds that could easily have been detected if we had the new technology. This has caused us to lose approximately \$1500 000.

Solution: With the upgraded fraud detection tool that the project will provide, we will close up the holes and ensure that we don't lose money on the new type of frauds we've seen previously.

Initial Estimations

Risk Assessment

Total Risk Score: 34

Risks

- Lacking skills
- Missing Software
- Security

Risk Details

Risks	State	Classification	Probability	Consequence	Score	Priority
Lacking skills	<input type="checkbox"/> Open	Technology	10 - Very High	7 - High	70	1 - High
Missing Software	<input type="checkbox"/> Open	Technology	4 - Medium	7 - High	28	1 - High
Security	<input type="checkbox"/> Open	-Select-	1 - Low	4 - Medium	4	1 - High

Financial Information

NPV: \$317,132

IRR: 14 %

ROI: 109 %

Financials

Sheets	Time Span	Time Interval
Budget	2009 Q1 - 2014 Q4	Quarter
Planned	2009 Q1 - 2014 Q4	Quarter
Actual	2009 Q1 - 2014 Q4	Quarter

Scope

Business Units

Configure

Members

Add Project Proposal Add Business Need Add Resource - Demand Delete

➤ Заполнены все поля формы, автоматически посчитаны предварительные финансовые показатели, оценены и визуализированы риски, определен скоп

Приоритизация и визуализация информации



Значимость для бизнеса

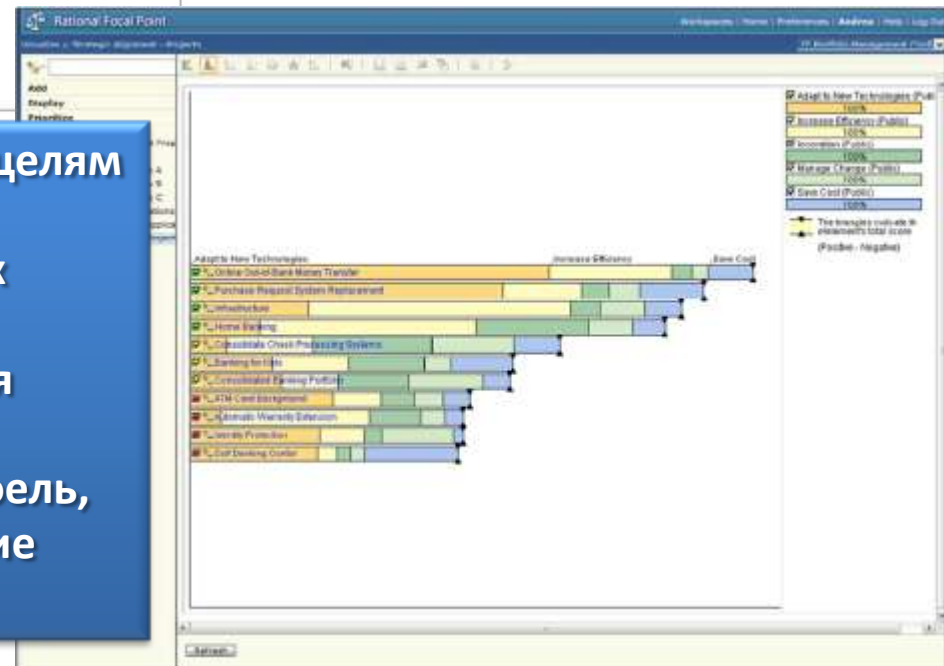
против

времени/ресурсов для производства

- Оценить влияние всех возможных факторов (рынок, конкуренты, затраты...)
- Выбрать ЧТО будете делать среди того, что МОЖНО сделать (реализации нужных требований)
- Повысить коэффициент значимости вашего продукта (системы, релиза...) по отношению к стоимости его разработки
- Никто не может сказать точно, что именно нужно сделать без детального расчета

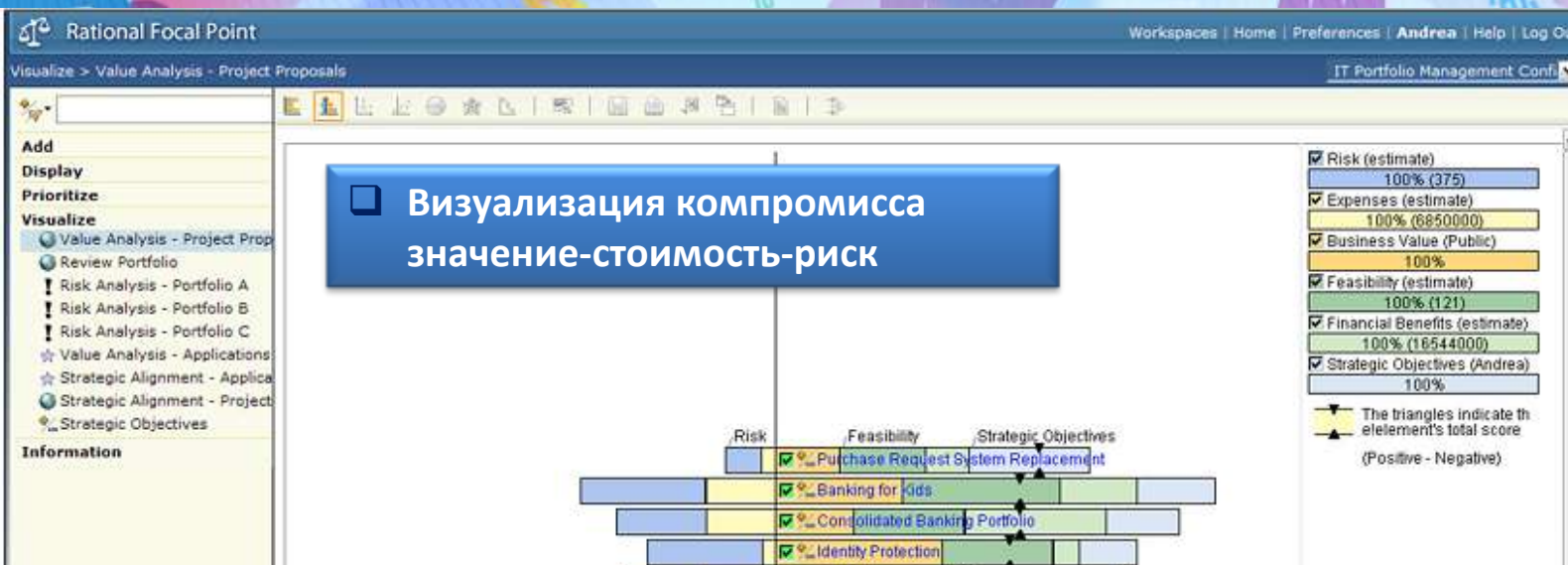
Оценка и приоритизация по стратегическим целям

The screenshot shows the Rational Focal Point interface with the title 'Which criterion has higher importance?'. It features two side-by-side comparison cards for 'Save Cost' and 'Innovation'. Each card includes a 'General Information' section with fields for Title, Description, State (Valid), Estimate, and Weight (20). A central icon of a scale of justice is positioned between the two cards. A 'comment' field is located below the comparison cards.

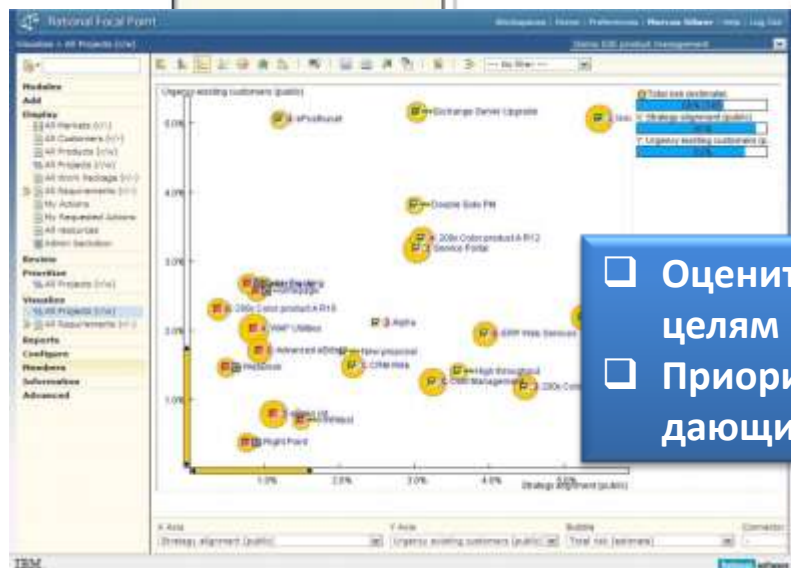


- Установить вес по стратегическим целям с помощью парных сравнений
- Приоритетность проектов в рамках парных сравнений
- Провести весовой анализ портфеля проектов
- Понять, как сбалансировать портфель, рассмотрев предложения и текущие проекты

Визуализация ценового анализа предложения проекта



- Оценить новый проект на соответствие стратегическим целям
- Приоритезировать проекты по ожидаемым значениям, дающим вклад в достижение цели



Предпланирование проекта

- Определить подробный масштаб проекта в виде бизнес-потребностей.
- Определение потребностей в ресурсах высокого уровня.
- Установить контрольные сроки проекта.

The screenshot displays the Rational Focal Point interface for project pre-planning. The main window shows the project 'Enhancement of Fraud Detection Tool' with the following details:

- Current State:** Pre plan project
- Transitions:** Ready for implementation approval
- General Information:** Enhancement of Fraud Detection Tool
- Initial Estimations:** Risk Assessment, Financial Information
- Scope:** Business Needs: 091:Real-Time Checks, 092:Automatic monitoring and alerts, 093:Authentication of client data, 094:GUI Refresh, 095:Access Rights
- Total Estimated:** 3 050 hours
- Resources:** 1 Developers - Enhancement of Fraud Detection Tool, 1 Project Managers - Enhancement of Fraud Detection Tool, 1 Testers - Enhancement of Fraud Detection Tool, 3 Developers - Enhancement of Fraud Detection Tool
- Estimated Total Resource Cost:** \$216 200
- Estimated Resource Man Hours:** 3 050
- Scheduling:** Duration: 14 Months, Target Start Date: 2010-07-17, Target Concept Date: 2010-09-30, Target Implementation Date: 2011-03-23, Target End Date: 2011-07-19, Delivery Date: 2011-08-31
- Element Information:** (Section header)

Red circles highlight the 'Scope', 'Resources', and 'Scheduling' sections, indicating key areas for project pre-planning.

Планирование финансирования и сравнение с бюджетом

Financials > Planned Last saved: - Info: -

Cell Input Menu ▾

Enhancement of Fraud Detection Tool	F	2010 Q2	G	2010 Q3	H	2010 Q4	I	2011 Q1	J	2011 Q2	K	2011 Q3	L	2011 Q4	M	2011 Q1
Expenditures	1	180900		83000		72000		56000		47000		0		0		
Capital Expenditures	Σ 2	2900		21000		27000		6000		14000		0		0		
Development	3	700		5000		4000		6000		14000						
Investments	4	2200		16000												
Operational Expenditures	Σ 5	178000		62000												
Resources	6	1000		1000												
Supplies	7	155000		4000												
R&D	8	22000		12000												
Benefits	Σ 9	275000		16000												
Cost Savings	10															
Cost Avoidance	11															
New Income	12	275000		16000												
Net Cash Flow	13	94100		77000												

Comparing (relative): Financials > Budget and Planned Last saved: - Info: -

Cell Input Menu ▾

Apollo	A	2009 Q1	B	2009 Q1	C	2009 Q1	D	2009 Q2	E	2009 Q2	F	2009 Q2	G	2009 Q3	H	2009 Q3
Expenditures	1	0		0		NaN		0		0		NaN		0		0
Capital Expenditures	Σ 2	0		0		105.714%		0		0		108.636%		0		0
Development	3	24000		25000		96.0%		15000		12000		125.0%		17000		18000
Investments	4	13000		10000		130.0%		8900		10000		89.0%		12000		10000
Operational Expenditures	Σ 5	24000		46000		52.174%		40000		75000		53.333%		53000		103000
Resources	6	20000		23000		86.957%		31000		41000		75.610%		40000		50000
Supplies	7	4000		18000		22.222%		6000		32000		18.750%		8000		45000
R&D	8	0		5000		0.0%		3000		2000		150.0%		5000		10000
benefits	Σ 9	0		0		NaN		0		0		NaN		0		0
Cost Savings	10	0		0		NaN		0		0		NaN		0		0
Cost Avoidance	11	0		0		NaN		0		0		NaN		0		0
New Income	12	0		0		NaN		0		0		NaN		0		0
Net Cash Flow	13	0		0		NaN		0		0		NaN		0		0

➤ Обновить планируемое финансирование для проекта и сравнить его с бюджетом

Financials > Budget and Planned Last saved: - Info: -

Cell Input Menu ▾

Apollo	A	2009 Q1	B	2009 Q1	C	2009 Q1	D	2009 Q2	E	2009 Q2	F	2009 Q2	G	2009 Q3	H	2009 Q3
Expenditures	1	0		0		NaN		0		0		NaN		0		0
Capital Expenditures	Σ 2	0		0		105.714%		0		0		108.636%		0		0
Development	3	24000		25000		96.0%		15000		12000		125.0%		17000		18000
Investments	4	13000		10000		130.0%		8900		10000		89.0%		12000		10000
Operational Expenditures	Σ 5	24000		46000		52.174%		40000		75000		53.333%		53000		103000
Resources	6	20000		23000		86.957%		31000		41000		75.610%		40000		50000
Supplies	7	4000		18000		22.222%		6000		32000		18.750%		8000		45000
R&D	8	0		5000		0.0%		3000		2000		150.0%		5000		10000
benefits	Σ 9	0		0		NaN		0		0		NaN		0		0
Cost Savings	10	0		0		NaN		0		0		NaN		0		0
Cost Avoidance	11	0		0		NaN		0		0		NaN		0		0
New Income	12	0		0		NaN		0		0		NaN		0		0
Net Cash Flow	13	0		0		NaN		0		0		NaN		0		0

Бизнес потребности и потребности в ресурсах

The screenshot displays the Rational Focal Point interface for project pre-planning. The main window shows the 'Enhancement of Fraud Detection Tool' project with the following details:

- Current State:** Pre-plan project
- Transitions:** Ready for implementation approval
- General Information:** Links, Initial Estimations, Risk Assessment, Financial Information, Scope
- Business Needs:** 091:Real Time Checks, 092:Automatic monitoring and alerts, 093:Authentication of client data, 094:GUI Refresh, 095:Access Rights
- Total Estimated Man Hours:** 3 050 hours
- Resources:** Enhancement of Fraud Detection Tool, Developers - Enhancement of Fraud Detection Tool, Enhancement of Fraud Detection Tool, Enhancement of Fraud Detection Tool
- Estimated Resource Man Hours:** 3 553
- Scheduling:** Duration: 14 Months, Target Start Date: 2010-07-17, Target Concept Date: 2010-09-20, Target Implementation Date: 2011-03-23, Target End Date: 2011-07-12, Delivery Date: 2011-08-31
- Element Information:** Add Project Proposal, Add Business Need, Add Resource - Demand

An inset window titled 'Enter information about the new Resource, then click OK.' is open, showing fields for Title, Project, Resource Profile (set to Developers), and Estimations (Number of Resources: 3, Resource Start Date: 2010-06-07, Resource End Date: 2010-12-20, Days Per Week: 5, Hours Per Day: 8).

➤ Уточнить бизнес потребности и потребности в ресурсах по срокам и времени использования

Показ ресурсов

The screenshot displays the Rational Focal Point interface. The main window shows details for a resource named "3 Developers - Enhancement of Fraud Detection Tool".

General Information

- Number of Resources: 3
- Resource Start Date: 2010-10-01
- Resource End Date: 2011-03-23
- Days Per Week: 5
- Hours Per Day: 8
- Estimated Duration: 119 work days
- Resource Rate: \$160
- Resource Cost: \$57,120
- Man Hours: 2,040

Resource Need Per Month

Month	2010	2011	2012	2013	2014
January		350			
February		350			
March		300			
April					
May					
June					
July					
August					
September					
October		350			
November		350			
December		300			
Sum	0	1,000	1,000	0	

Element Information

➤ График использования конкретного ресурса

Жесткое и мягкое резервирование ресурсов

Rational Focal Point Workspaces | Home | Preferences | Andrea | Help | Log Out

Display > Capacity Analysis IT Portfolio Management Conf

Booked and Soft booked

Resource Profile	Quantity	Sum: Resource Distribution Element							
Developers	12	2009	2010	2011	2012	2013	2014	500 Developers - Availability	
		January	-49 000	-56 700	-59 250	-59 600	-79 600	-59 600	5 Developers - Apollo
		February	-49 600	-68 600	-69 250	-69 600	-79 600	-59 600	150 Developers - Rho
		March	-40 600	-68 600	-69 278	-69 600	-79 600	-59 600	16 Developers - Fortuna
		April	-31 000	-68 600	-69 548	-69 600	-79 600	-59 600	10 Developers - Epsilon
		May	-31 000	-68 600	-69 548	-69 600	-79 600	-59 600	13 Developers - Nu
		June	-31 000	-69 600	-69 548	-69 600	-79 600	-59 600	6 Developers - Pi
		July	-30 220	-59 600	-59 570	-69 600	-79 600	-59 600	20 Developers - Omicron
		August	-19 170	-49 000	-49 000	-49 000	-49 000	-49 000	15 Developers - Jupiter
		September	-28 770	-59 600	-59 600	-59 600	-59 600	-59 600	20 Developers - Lambda
		October	-27 770	-59 250	-59 600	-59 600	-59 600	-59 600	3 Developers - Enhancement of...
		November	-28 300	-59 250	-59 600	-59 600	-59 600	-59 600	1 Developers - Enhancement of...
		December	-32 100	-48 700	-49 000	-49 000	-49 000	-49 000	
Sum		399 430	-736 100	-742 792	-754 000	-834 000	-694 000		
Process Manager	1	2009	2010	2011	2012	2013	2014	10 Process Manager - Availability...	
		January	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		February	10 000	10 000	10 000	10 000	10 000	10 000	
		March	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		April	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		May	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		June	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		July	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		August	-5 000	-5 000	-5 000	-5 000	-5 000	-5 000	
		September	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		October	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		November	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
		December	-10 000	-10 000	-10 000	-10 000	-10 000	-10 000	
Sum		115 000	-115 000	-115 000	-115 000	-115 000	-115 000		

Row: Resource Profile Column: --- None --- Cell: Sum: Resource Distribution Plain text Refresh

Утверждение проектов к реализации

- Посмотреть баланс проектов
- Провести анализ эффективности проектов
- Понять пути развития проектов

Primary Strategic Objective & NPV

Primary Strategic Objective	Quantity	Sum: NPV	Share
Adapt to New Technologies	1	299 853	13,7%
Innovation	1	1 106 225	50,5%
Manage Change	1	783 040	35,8%
Sum: 3		Sum: 2 189 118	

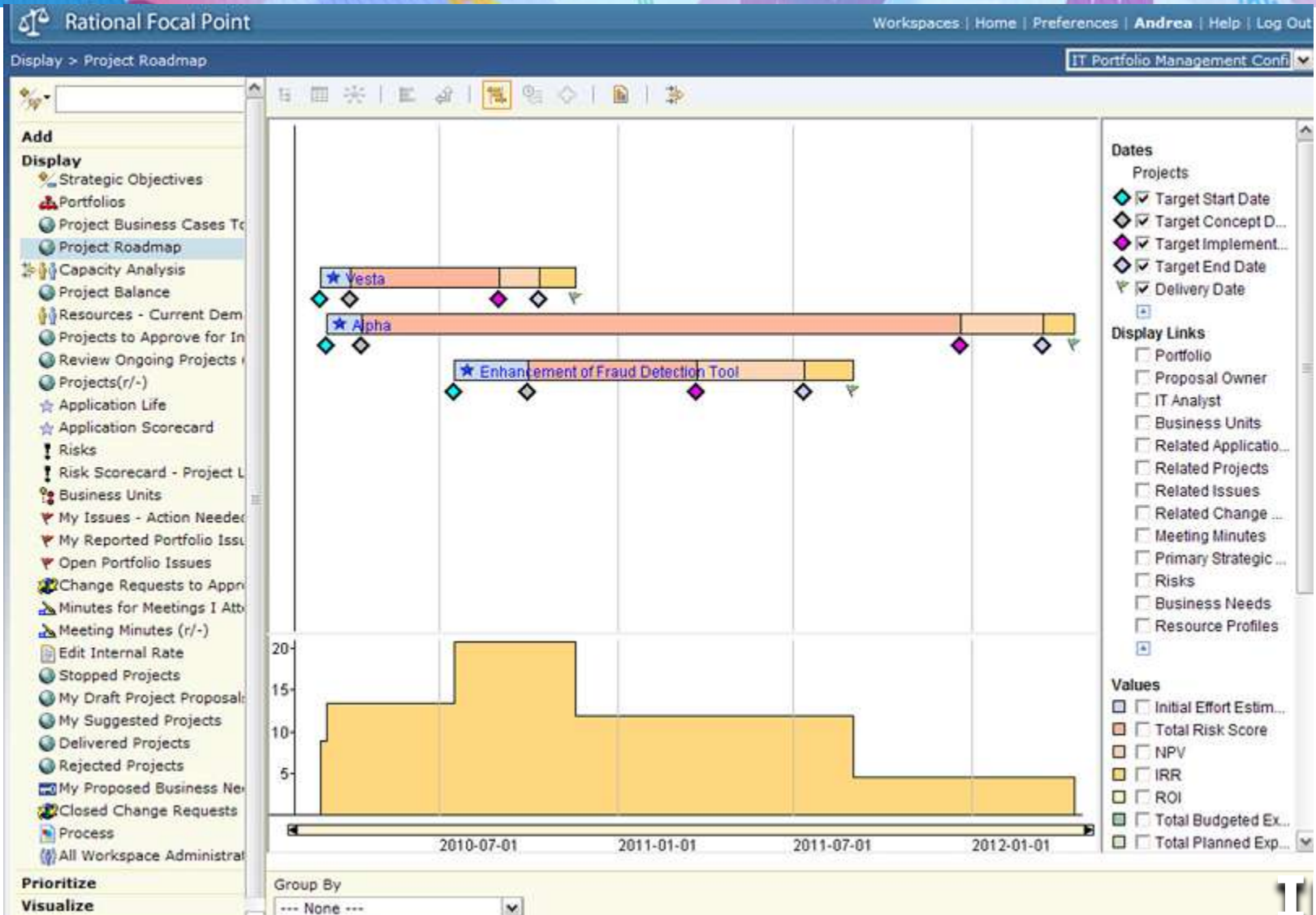
Type & Total Budgeted Expenses

Type	Quantity	Sum: Total Budgeted Expenses	Share
-select-	0	0	0,0%
Strategic	2	2 214 300	62,7%
Cost reduction	1	1 320 000	37,3%
Revenue generation	0	0	0,0%
Mandatory	0	0	0,0%
Sum: 3		Sum: 3 534 300	

Portfolio & NPV

Portfolio	Quantity	Sum: NPV	Share
Business Operation	1	703 040	32,6%
Infrastructure	2	1 406 078	64,2%

Путевая карта проекта



Контроль осуществления проекта

Rational Focal Point Workspaces | Home | Preferences | Eric | Help | Log Out

Display > Review Ongoing Projects (r/-) IT Portfolio Management Conf

Overall

Title	Type	Portfolio	Primary Strategic Objective	Total Risk Score	NPV	Completeness (%)	Planned Expenses Overrun
Apollo	Cost reduction	Business Operation	Save Cost	43	\$398 533	100 %	
Enhancement of Fraud Detection Tool	Strategic	Infrastructure	Adapt to New Technologies	34	\$299 853	12 %	
Epsilon	Strategic	Business Operation	Save Cost	0	\$1 538 256	0 %	
Fortuna	Strategic	Infrastructure	Manage Change	20	\$-2 002	45 %	
Jupiter	Cost reduction	Infrastructure	Save Cost	23	\$0	100 %	
Lambda	Strategic	Business Operation	Adapt to New Technologies	40	\$439 132	0 %	
Nu	Cost reduction	Infrastructure	Innovation	15	\$0	81 %	
Omicron	Cost reduction	External Applications	Increase Efficiency	16	\$0	4 %	

Add

Display

- ☆ Applications(r/-)
- My Proposed Business Needs
- Business Needs - Planned an
- Business Needs Ready to Be
- Business Needs
- My Change Requests - Action
- Closed Change Requests
- Proposed Change Requests
- Change Requests(r/-)
- Strategic Objectives (r/-)
- Process
- My Issues - Action Needed
- My Reported Issues
- All Issues (r/-)
- All Workspace Administrators
- Portfolios(r/-)
- My Suggested Projects
- Create Project in Project Cor
- Projects Under Implementati
- Review Ongoing Projects (r/-)
- Delivered Projects
- My Draft Project Proposals
- Projects(r/-)
- Projects On Hold
- Project Pre-Planning
- Project Roadmap
- Rejected Projects
- Stopped Projects
- Resource Profiles
- Resources
- Risks

Information

Maximum number of elements per page

50

Export Review Ongoing Projects (r/-) Update Projects

Контроль осуществления проекта

Rational Focal Point
Display - Review Ongoing Projects (1/1)

Schedule

Proj.	Implementation Status	Completeness (%)	Report On Schedule	Project On Target	Budget On Target	Total Actual Max. Cost	Days	Forecasted Response Time (Days)	Duration	Report Start Date	Report End Date	Overall End Date	Overall End Date	Delivery Date
Enhancement of Fraud Detection Tool	Started	12 %	🟡	🟡	🟡	1 044 hours	1 044	0.353	11 Months	2009-07-23	2010-03-23	2010-01-23	2010-01-23	2010-08-31
Enforce	Planned	0 %	🟡	🟡	🟡	6 hours	0 days	0.848	0 Months	-	-	-	-	-
Support	Completed	100 %	🟢	🟢	🟢	11 420 hours	113	26.600	18 Months	2009-08-18	2009-02-18	2009-02-18	2009-02-18	2009-01-13
Support	Completed	100 %	🟢	🟢	🟢	0 hours	0 days	0.243	0 Months	-	-	-	-	2010-03-18
En	Being Tested	81 %	🟡	🟡	🟡	3 774 hours	1 200	13.800	9 Months	2009-03-18	2009-03-18	2009-03-18	2009-03-18	2009-12-20
Support	Being Planned	4 %	🟡	🟡	🟡	6 413 hours	852	47.538	9 Months	2009-03-18	2009-03-18	2009-03-18	2009-03-18	2009-12-19

Maximum number of elements per page: 30

Export Review Ongoing Projects (1/1) Update Projects Free View Sorting

Rational Focal Point
Display - Review Ongoing Projects (1/1)

Business

Title	Portfolio	Project Owner	Business Unit	Business Application	Primary Business Objective	Business Feasibility	Total Risk Score	Number of Open High Priority Issues	Project Budget Delay	Business Needs
Applis	Business Operation	Nathan	SUI	B-Planner	Save Cost	25 - Excellent	43	🟡	🟡	<ul style="list-style-type: none"> 252: Perform Tests 254: Perform upgrade 255: create backup 256: fix errors 257: Products
Enhancement of Fraud Detection Tool	Infrastructure	Usher	SUI	Fraud Detection Tool	Adapt to New Technologies	10 - Excellent	24	🟡	🟡	<ul style="list-style-type: none"> 251: Back-Flow Checks 252: Automatic Monitoring and Alerts 253: Enhancement of Search Sds 254: Sds Refactor 255: Access Rights
Enforce	Business Operation	Harald	SUI	-	Save Cost	19 - Excellent	0	🟡	🟡	<ul style="list-style-type: none"> 151: Business Need 152: Business Need 153: Business Need 154: Business Need 155: Business Need 156: Business Need 157: Business Need 158: Business Need 159: Business Need 160: Business Need 161: Business Need 162: Business Need
Enforce	Infrastructure	Sofa	SUI	Inventory System	Manage Change	22 - Excellent	20	🟡	🟡	<ul style="list-style-type: none"> 151: Business Need 152: Business Need 153: Business Need 154: Business Need 155: Business Need 156: Business Need 157: Business Need 158: Business Need 159: Business Need 160: Business Need 161: Business Need 162: Business Need

Maximum number of elements per page: 50

Export Review Ongoing Projects (1/1) Update Projects Free View Sorting

- Planned Expenses Overrun 🟢
- Used Budget vs Completeness % 🟢
- Number of Open High Priority Issues 🟢
- Project On Schedule 🟢
- Project Progress on Target 🟢
- Project Scope Delay 🟢

Rational Focal Point
Display - Review Ongoing Projects (1/1)

Financial

Title	BV	ROI	Total Budgeted Expenses	Total Planned Expenses	Total Actual Expenses	Total Budgeted Benefits	Total Planned Benefits	Total Actual Benefits	Planned Progress Overrun	Overall Budget vs Completeness %
Applis	690 200	18 %	179 200	157 500	89 700	1 042 000	1 122 900	122 700	🟡	🟡
Enhancement of Fraud Detection Tool	690 200	18 %	179 200	157 500	89 700	1 042 000	1 122 900	122 700	🟡	🟡
Enforce	81 500	206.53 %	6 270 000	6 460 000	10 114 000	6 460 000	6 800 000	6 927 000	🟡	🟡
Enforce	0 000	0 %	0 000	0 000	0 000	0 000	0 000	0 000	🟡	🟡
Support	80	0 %	0 %	0	0	0	0	0	🟡	🟡
Support	80	0 %	0 %	0	0	0	0	0	🟡	🟡
Enforce	80	0 %	0 %	0	0	0	0	0	🟡	🟡
Enforce	80	0 %	0 %	0	0	0	0	0	🟡	🟡

Maximum number of elements per page: 30

Export Review Ongoing Projects (1/1) Update Projects

Контроль осуществления проекта Финансы портфеля

Portfolio Financials								
Title	Accumulated Investments	Total NPV - Ongoing Projects	Projects - Budgeted Benefits	Projects - Planned Benefits	Projects - Actual Benefits	Projects - Budgeted Expenses	Projects - Planned Expenses	Projects - Actual Expenses
Business Operation	\$37 819 991	\$9 292 589	\$24 659 000	\$18 093 900	\$10 069 700	\$11 716 300	\$11 132 000	\$16 192 700
External Applications	\$10 241 787	\$4 030 889	\$12 053 020	\$9 201 155	\$442 197	\$5 103 500	\$5 015 875	\$754 778
Infrastructure	\$16 049 257	\$30 028 426	\$88 313 480	\$86 982 480	\$67 005 700	\$30 717 351	\$37 391 340	\$25 658 549

Portfolio Health					
Title	Project Expenses Overrun	Red Lights in Ongoing Projects	Open High Priority Issues	Portfolio Level Risk Score	Project Level Risk Score
Business Operation					
External Applications					
Infrastructure					

Deviation Expected vs Actual		
Title	Deviation Benefits (%)	Deviation Expenses (%)
Business Operation		

Контроль осуществления проекта

Projects with Overrun Planned Expenses		
Title	Project State	Portfolio
Apollo	Approved for implementation	Business Operation
Epsilon	Approved for implementation	Business Operation



Open High Priority Portfolio Risks				
Title	Portfolios	Approach	Probability	Consequence
Budget overrun	Infrastructure	Mitigate	10 - Very High	7 - High
Poor project management	Infrastructure	Accept	1 - Low	4 - Medium
Low quality project deliverables	External Applications	Watch	4 - Medium	1 - Low
Possibility to impair benefits	External Applications	Mitigate	7 - High	4 - Medium
Budget cuts	Business Operation	Watch	1 - Low	4 - Medium
Overambitious plans	Business Operation	Accept	1 - Low	1 - Low
Unacceptable NPV	Business Operation	Mitigate	10 - Very High	10 - Very High
Lacking resource availability	Business Operation	Mitigate	10 - Very High	7 - High
Poor application of best practice	External Applications	Mitigate	4 - Medium	7 - High
Failing execution of strategy	Infrastructure	Watch	4 - Medium	1 - Low
Changed strategy	External Applications	Accept	4 - Medium	1 - Low
High expectancy - Low result	Business Operation	Watch	1 - Low	4 - Medium

Прогресс на контрольных точках

Непрерывность и измеряемые улучшения

Анализ данных

Изучение возможностей



To be clarified	1	2,1%
On hold	3	6,4%
Stopped	1	2,1%
Rejected	2	4,3%
Delete	2	4,3%
Sum:	47	

Вопросы?

SIBIS
ПАРТНЕРСТВО РАДИ УСПЕХА

