

# Deltek WelcomPortfolio™

## Analyzing the Project Portfolio to Maximize Returns

### DELTEK WELCOMPORTFOLIO HELPS YOU:

- Capture key project information from across the organization
- Choose the right number of projects based on available resources
- Identify redundant project effort
- Gain visibility into key performance indicators
- Align projects with strategic goals
- Choose the right mix of projects to maximize returns

Managing project portfolios requires that executives have access to consistent and accurate information about all projects in their organization. However, project information is often scattered across different systems, departments and business units. It is difficult to consolidate to get an accurate understanding of how these projects affect overall company profitability. The result is inefficient resource allocation and a convoluted project selection process that makes it harder to reach strategic and financial goals.

### A PROJECT PORTFOLIO ANALYSIS TOOL TO OPTIMIZE PROJECT SELECTION AND RESOURCE ALLOCATION

Organizations that are looking to improve profits by balancing risks and rewards across its projects more effectively need software that consolidates project information from multiple systems in real time to provide a centralized, comprehensive view of project information to employees at all levels. They need a system that helps project managers identify and reduce overused, duplicate or wasted resources and helps executives make objective project selection decisions based on true project value.

Deltek WelcomPortfolio provides comprehensive portfolio analysis capabilities to help project-focused companies invest in those projects that best fit overall business strategy. Deltek WelcomPortfolio helps companies consolidate

key information from multiple project systems and apply a structured process and objective analyses to make better decisions about resource allocations and when to take on new project initiatives.

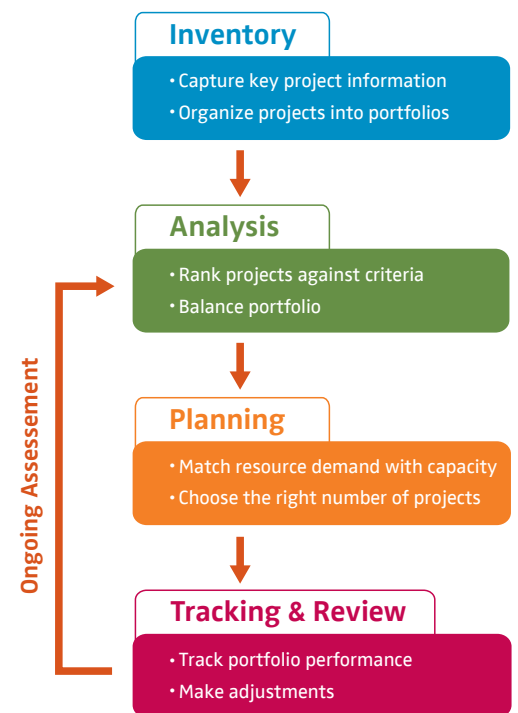


Figure 1: WelcomPortfolio is based on a structured process of continual improvement

## THE DELTEK WELCOMPORFOLIO ADVANTAGE

**Facilitates Consistent Project Selection Process** — With Deltek WelcomPortfolio, organizations avoid project selection decisions that depend on opinions or company politics. Deltek WelcomPortfolio incorporates a structured, continual improvement process that takes inventory of current project portfolios to rank each against the optimal portfolio balance. Using those same criteria, new projects are assessed to objectively determine how well they support that balance and whether or not they should be added to the portfolio.

**Optimizes the Use of Resources** — The efficient allocation of company resources helps determine how well organizations meet project schedules, cost objectives, and financial targets. Deltek WelcomPortfolio helps project-focused organizations quickly identify and reduce over utilized, duplicate or underutilized resources, and consistently avoid cost and schedule overruns. This comprehensive planning capability allows organizations to implement the best mix of resources based on current and future demands.

**Accurately Assesses Current Project and Portfolio Values** — In one central location, Deltek WelcomPortfolio provides employees at all levels of an organization with consistent information regarding projects across all portfolios. Built in adapters consolidate project metrics from other systems to help users accurately evaluate the progress of ongoing projects, assess the value of potential projects, and plan for future resource capacity requirements.

**Aligns Projects with Overall Strategy** — Organizations that select projects based on objective financial measurements rather than opinions are more likely to realize strategic goals. Deltek WelcomPortfolio provides an overall view of the projects within a portfolio based on user-defined criteria such as Return on Investment (ROI), Net Present Value (NPV), Payback Period, Risk Score or Market Growth, which helps these organizations invest in projects that, taken together, produce an optimal return.

## KEY FEATURES AND BENEFITS

### CENTRALIZED, CONTINUOUS PROJECT AND PORTFOLIO PERFORMANCE TRACKING

Employees have access to aggregated information about all projects in a central repository. Organizations can group projects into portfolios and automatically roll individual project results up to the portfolio level in real-time.

- **Project Workbook** — Provides users with an overview of each project that identifies initial business case metrics such as ROI and NPV.
- **Portfolio Workbook** — Consolidates project information from each project workbook based on project portfolio groups. Includes summary information about each portfolio such as ROI and spending targets to help project managers and executives quickly assess and compare portfolio performance.
- **Project Adapters** — Unique project adapters allow users to dynamically update any item in the project and portfolio workbooks from the project results held in popular project management applications like Deltek Open Plan™, Deltek Cobra™, Microsoft® Project and Primavera® ensuring access to the most accurate and current project data.

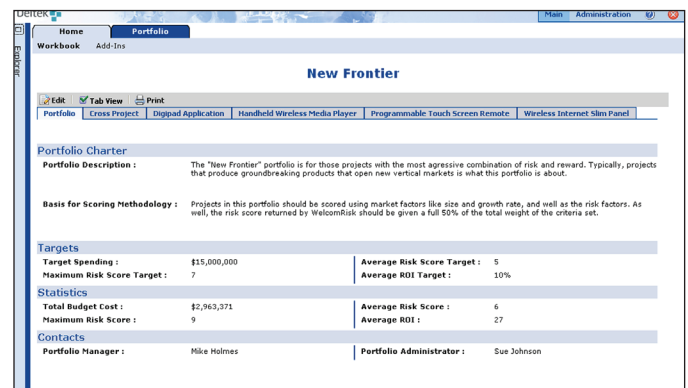


Figure 2: Project/Portfolio Workbook

### MORE OBJECTIVE PROJECT DECISIONS

Comprehensive scoring capabilities allow project managers to create weighted criteria that are used to objectively rank current and potential projects allowing project managers and executives to easily compare individual and overall project performance against a consistent set of relevant criteria.

- **User-definable Scoring Criteria** — Users can define customized scoring criteria based on qualitative, quantitative and discrete values that are linked to and updated with project metrics from external project management tools such as project risk scores from Deltek WelcomRisk™ or internal metrics held in the project and portfolio workbooks.

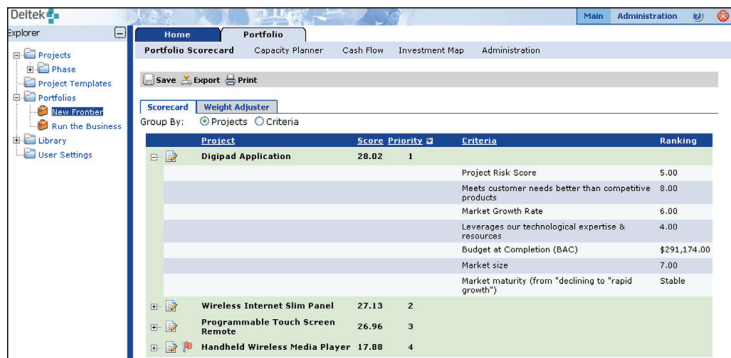


Figure 3: Weighted Scoring Criteria

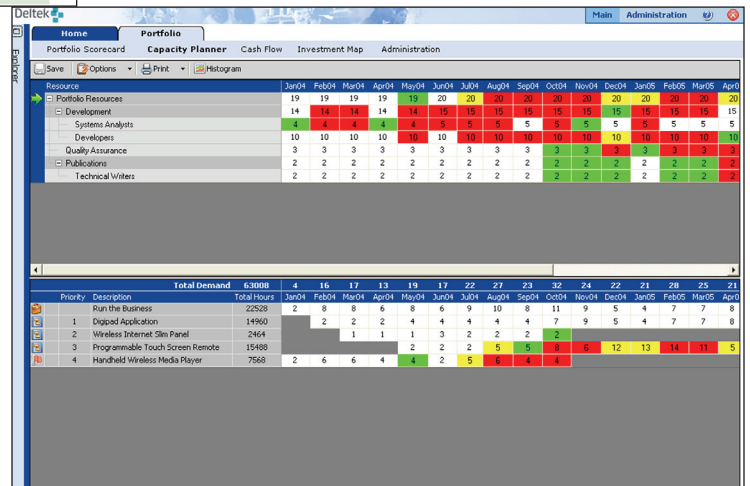
- **Weighted Criterion Sets** — Allows users to combine and weight project criteria to accommodate the relative priorities of competing business goals. Executives can feel confident that strategic priorities are automatically and implicitly considered in project selection and resource allocation decisions.
- **Scoring Wizard** — Provides project managers with a user-friendly wizard that applies the criterion sets to each project consistently in order to accurately rank all projects within the portfolio.
- **Portfolio Scorecard** — Users have access to a one page summary that helps project managers and executives easily evaluate projects within a portfolio and compare rankings of ongoing and potential projects.

### MORE EFFICIENT, EFFECTIVE CAPACITY PLANNING

Capacity planning capabilities help organizations match resource requirements with ongoing project demands. Project managers can verify that there are enough resources available at all times to efficiently fulfill project objectives.

- **Project Planner** — Users are able to define project phases and resource requirements in a time-based grid making it easy for project managers to create accurate capacity plans for new project initiatives.
- **Resource Planner** — Allows project managers to accommodate resource constraints based on the hierarchical structure of project resources. Users save time and reduce errors by importing resource structures from Deltek Open Plan, Microsoft Project and Primavera.
- **Interactive Capacity Planner** — Provides project managers with an interactive view of resource under-or-over-utilization, which is used to quickly adjust project schedules or resources and resolve constraints in real-time.

Figure 4: Capacity Planner



Backed by professional implementation services, Deltek WelcomPortfolio™ is helping many project-focused organizations select the right projects and utilize its resources more effectively through its proven project portfolio analysis capabilities.

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Deltek is a global leader dedicated to delivering enterprise management software that meets the unique needs of project-focused organizations. With over two decades of experience, Deltek enables companies to maximize profitability and productivity, integrating all aspects of their businesses. More than 11,000 customers worldwide rely on Deltek to streamline operations, improve performance and win more business.

## SUPPORTED APPLICATION SERVER SOFTWARE PLATFORM

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Microsoft® .NET Framework 1.1  
Windows® 2000, XP, 2003

## SUPPORTED WEB SERVER SOFTWARE PLATFORM

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Internet Information Server 5.1 (IIS) or Higher  
Windows® 2000, XP, 2003

## CLIENT BROWSER SOFTWARE PLATFORM

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Client Browser Software Platform  
Microsoft Internet Explorer 6® or Higher  
Windows® (Microsoft® .NET Framework 1.1 is Required)

## DATABASE TYPE PLATFORM

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Oracle® 8i, Oracle 9i, Oracle 10g  
Windows® NT, 2000, 2003, XP  
Microsoft SQL Server® 2000  
UNIX