

AT A GLANCE

Deltek WelcomPortfolio™ Features

Deltek WelcomPortfolio is a project portfolio analysis tool that provides a structured approach to evaluating, selecting, and prioritizing projects so that resources are always invested in the right projects — those that best fit with current business strategy.

PROJECT WORKBOOKS

- An overview of each project
- Information entered manually or dynamically linked to existing data in other tools

PORTFOLIO WORKBOOKS

- Project metric information summarized for each portfolio
- Central repository of comparable project information
- Content consolidation of each project workbook
- Print in a tabular format, selecting which columns will show
- Output goes to either the browser or Excel®

SCORING AND PRIORITIZING PROJECTS

- With a user-friendly scoring wizard, rank projects by a unique, weighted set of criteria for each type of portfolio
- Summarize project scores in a portfolio scorecard
- Use a common set of criteria across multiple portfolios
- Determine how many of your resources are required to meet the demands of your projects
- Easily create custom criteria to reflect project and organizational environment

INVESTMENT MAPS AND CHARTS

- With investment charts, view your relative spending across all portfolios
- Analyze project balance from a variety of different perspectives
- With the investment pie chart, get an accurate picture of overall spending patterns across the enterprise
- With the investment map, make an accurate assessment of balance across a portfolio

COST/BENEFIT ANALYSIS

- Cost/benefit analysis capabilities remove the guesswork in assessing metrics like return on investment (ROI)
- Financial calculator yields key financial indicators including: ROI, Payback period, Net present value and Internal rate of return
- Cash flow values are generated based on resources assigned to the project

CAPACITY PLANNING

- Determine the right number of projects based on effective capacity planning
- Quickly and easily create high-level plans by estimating time-phased resource requirements against the high-level project phases
- Exclude demand from selected projects (e.g., put a project on hold) and include demand from other portfolios
- For ongoing projects, bring in resource demand and availability from an external tool
- See total hours, cost, or revenue for each line item
- Import resource breakdown structures (RBS) from external applications
- With the capacity planner, interactively compare project-level resource demand with global resource capacity
- Perform what-if analyses by dragging entire projects or specific resource usage backwards or forwards in time to resolve conflicts or test alternative scenarios
- Import resource information from scheduling tools such as Deltek Open Plan™, Microsoft Project®, Primavera® P3e®, or P3e/cTM

RESOURCE TYPES

- Time-phase direct cost and revenue to manage resource hours more effectively
- Filter, summarize, or group resource hours for easier management
- Control the quantity type displayed with options like hours, staffing heads, factored hours, and factored staffing heads
- Include non-labor type resources within the project plan

INTEGRATION

- Stand-alone product for portfolio analysis and project selection
- Import or manually enter project and resource information from external systems
- Export project plans to new or existing Deltek Open Plan™ or Microsoft® Project schedule
- Directly enter scoring criteria or pull in scoring criteria from the external tools in which the projects are managed
- Deltek WelcomPortfolio includes project adapters to the following applications: Deltek Open Plan, Primavera® P3e 3.5x, Deltek Cobra™ 4.x, Primavera P3e/c and Microsoft Project 200x
- Create custom adapters to link to virtually any product that uses a SQL data source

.NET FRAMEWORK

- Users can add custom views and functionality to meet the needs or preferences of the organization
- Reports are in a central location and can be saved by the user. This makes reports easy to find and share with other users
- The filtering feature allows for creating complex filtering statements which can be created for one user or shared by all
- Users can elect to receive email notifications when certain events occur relative to their job function. For example, if an assigned activity or task status reaches a predefined threshold, or an issue is raised, you will automatically receive a notification

PERFORMANCE TRACKING

- Dynamically connect to project metrics from project management tools to update project workbook items and replace manual estimates
- The portfolio scorecard for a project in progress may reveal: Cost data from Deltek Cobra, Schedule and resource data from Deltek Open Plan, Microsoft Project, P3e, or P3e/c, Risk scores from Deltek WelcomRisk™ and Financial data from your accounting system

SECURITY

- With named-user access, control exactly what information individual users can see and what they can do with that information
- Combine strict data security and ease of administration with: Encrypted user information, Support for Secure Socket Layer (SSL) across a network and Integration with other security systems such as LDAP or Active Directory
- Three-tier system of users, groups and roles
- Granular security – applicable to every action within the product
- Users may belong to more than one group
- Users and/or groups may inherit a role in a project

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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.

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