Performance Management

User Guide

Changepoint PSA 2017

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1. Viewing Individual and Team Performance Results

About the individual performance portlets

You can view individual and team performance results in the performance portlets on your home page. Graphic representation of the data, color indicators and links to details allow you to quickly assess the results.

The following portlets display information about individual and team performance:

- **My Performance Chart** portlet – displays the results of metrics that are assigned to you directly or to a team that you belong to. For more information, see "Viewing your personal metric results" on page 5.
- **People Performance Management** portlet – displays the results of metrics of resources in your workgroup and in workgroups to which you have access. If you are a manager, you can see how your team is performing. For more information, see "Viewing metric results of your workgroups" on page 7.

Viewing your personal metric results

You can view your own metric results in the **My Performance Chart** portlet on your home page.

1. On your home page, expand the **My Performance Chart** portlet.
2. If required, filter the data you want to display.
   a. Click and select the IPM period.
   b. Click **Go**.

   The performance chart for the selected criteria appears.

Viewing trends of your performance

You can view trends of your performance over time.

1. On your home page, expand the **My Performance Chart** portlet.
2. In the results table, click the number in the **Actuals** column of a metric.

   The **Trend Analysis** view for the metric appears.

The blue line represents the targets set in your metric, and the orange line shows how you performed. The variance is the difference between target values and actual values. It is compared against the threshold to determine your performance status.

Entering data for a user-entered metric

You can enter data manually for your own performance results, or you can enter data that will be used to evaluate the performance of other resources.

1. On your home page, expand the **My Performance Chart** portlet.
2. Select a different reporting period, if required.
3. Do one of the following:
   - To enter data for yourself, click beside the metric name.
   - To enter data for another resource, click . In the **Inputs** view, click in the row of the resource.

   The **Result Tracking** dialog box appears.
4. In the **Description** field, type a description.
5. By default, the **Reference date** field displays the current date. Click and select another date, if required.
6. In the **Quantity** field, enter a value.
7. The **Units** field indicates the unit used for the quantity or amount.
8. Click **Save**.

Viewing user-entered data for an individual metric

1. On your home page, expand the **My Performance Chart** portlet.
2. In the results table, click the number in the **Actuals** column of a user-entered metric.

   The **Trend Analysis** view for the metric appears.
3. Click **Display actual data**.

   The **Inputs** view displays the data that was manually entered for the metric.

Viewing user-entered data for a team metric

1. On your home page, expand the **My Performance Chart** portlet.
2. In the results table, click the number in the **Actuals** column of a metric.

   The **Trend Analysis** view for the metric appears.
3. Click .
4. Click **Display actual data**.

   The **Inputs** view displays the data that was manually entered for the metric by resources selected for metric input.

Viewing metric results of your workgroups

1. On your home page, expand the **People Performance Management** portlet.
2. If required, filter the data you want to display.
   a. Click and select the reporting period and workgroups.
   b. To include all workgroups under your workgroup, select the **Include children** check box.
   c. Click **Go**.

   The result for the selected criteria appears.

2. Creating Portfolios

About portfolios

Project portfolios allow you to group and evaluate projects that have a common set of measurement criteria such as line of business, priority, campaign, and geographic or technological divisions.

You can further group project portfolios into *rollup* portfolios. A rollup portfolio is essentially a summarization of the data in the group of project portfolios. For example, project managers can create project portfolios to monitor their projects, and then create a rollup portfolio to provide an overall view of all their project work.

Project portfolios are made up of one or more projects and rollup portfolios are made up of one or more portfolios.

Accessing a portfolio category

Click **General** > **Portfolios**. The **Portfolios** tree view appears.

Creating a portfolio category

Portfolios are organized in portfolio categories.

1. Click **New** > **Portfolio category**.

   The **Create Portfolio Category** dialog box appears.

2. In the **Category** field, enter a name for the portfolio category.
3. In the **Description** field, enter a description for the portfolio category.
4. Click **Save**.

Editing a portfolio category

1. Access the portfolio category.
2. Make the necessary changes.
3. Click **Save**.

Deleting a portfolio category

You can only delete a portfolio category if it does not contain any portfolios.

1. Access the portfolio category.
2. Click **Delete**.
3. Click **OK** to confirm.

Accessing a portfolio

1. Click **General** > **Portfolios**.

   The **Portfolios** tree view appears.

2. Expand the tree view, and then click the portfolio.

   The portfolio profile appears.

   Note: If the section contains more items than can be displayed on one page, click the forward/back buttons or select a specific page number and click the **Go to page** button to view the selected page.

Creating a portfolio

1. Click **New** > **Portfolio**.

   The **Create Portfolio** dialog box appears.

2. Click the **General** tab.
3. Complete the fields as required. For more information, see "Create/Edit Portfolio dialog, General tab options" on page 11.
4. To continue completing the portfolio, see the following topics:
   - "Adding a metric for portfolios" on page 12
   - "Adding a project to a project portfolio" on page 15
   - "Selecting custom stored procedures for portfolio health" on page 17
   - "Restricting access to a portfolio to specific resources" on page 11
5. Click **Save**.

Create/Edit Portfolio dialog, General tab options

Field	Description
Category list	Category of the portfolio.
Portfolio name field	Name of the portfolio.
Description field	Description of the portfolio.
Currency list	Currency to be used for the portfolio. All monetary target and actual amounts will be converted to and displayed in this currency.
Fiscal period list	Billing office that includes the fiscal periods that are used to filter portfolio data. Only portfolios with the same billing office can be included in the rollup portfolio. If a billing office is not selected and portfolios from more than one billing office are subsequently added to the rollup portfolio, the field cannot be edited.
Rollup portfolio check box	When selected, the portfolio is saved as a rollup portfolio. When cleared, the portfolio is saved as a project portfolio.

Restricting access to a portfolio to specific resources

By default, before any restrictions are applied to a portfolio, all resources have full access. You can restrict view and/or edit access to portfolios to specific resources or the resources in specific workgroups only. When you restrict access, only resources or workgroups that you specify can view or edit the portfolio.

1. Access the portfolio.
2. Click **Actions** > **Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click the **Access** tab.
4. To restrict view access, select the **Restrict view access to the following resources** check box.

5. To restrict edit access, select the **Restrict edit access to the following resources** check box.
6. To select individual resources:
   a. To select other resources and optionally add them to your preferred resources list, click **Manage Resources**.
   b. In the **Preferred resources** list, select the resources that you want to restrict access to.
   c. Move the resources to the appropriate view access list (or edit access list) by clicking the up arrow above (or the down arrow below) the **Preferred Resources** list.
7. To restrict access by all of the resources in one or more workgroups:
   a. Click **Workgroups**.
   b. In the **Workgroups** list, select the workgroups whose members you want to restrict access to.
   c. Move the workgroups to the appropriate view access list (or edit access list) by clicking the up arrow above (or the down arrow below) the **Workgroups** list.
   d. To add other workgroups to the list, click **Manage Workgroups**.

   Note: The **Manage Workgroups** dialog box does not indicate the workgroups that have previously been selected.
8. Click **Save**.

Adding a metric for portfolios

Portfolios use metrics with specific weighting to determine the importance of the metrics in the overall health of the portfolio. For more information, see About portfolio performance in the *Changepoint Administration Guide*.

Targets associated with a project metric type (cost, effort, schedule) are defined in the project plans and do not have to be redefined in portfolios.

1. Access the portfolio.
2. Click **Actions** > **Edit portfolio.**

   The **Edit Portfolio** dialog box appears.

3. Click the **Metrics** tab.
4. Complete the fields as required. For more information, see "Create/Edit Portfolio dialog, Metrics tab options" on page 13.
5. Click **Add**.

   The metric is added to the metrics table.
6. Click **Save**.

Create/Edit Portfolio dialog, Metrics tab options

Field	Description
Template name list	A project metric template.
Weighting field	Weighting percentage for the metric.
Target field	Numeric value for the target. Available for customer/peer metrics or user-entered metrics.
Item Target section	
Override target check box	When selected, the targets in the rollup portfolio override the targets in the individual portfolios that make up the rollup portfolio.
Target date field	Date value for the target. Available for date metrics only.
Target duration field	Number of days against which the variance is measured.
Item variance threshold list	Indicates if the target to be reached for each item is over or under a specified threshold.
Apply lower-level thresholds check box	When selected, the thresholds from the project portfolios are used.
Over/Under field **Under/Over** field	Minimum and maximum percentage for the item variance threshold.

Field	Description
Absolute Value check box	When selected, all variances over or under the threshold are considered.
Portfolio Target section	
Override target check box	When selected, the targets in the rollup portfolio override the targets in the individual portfolios that are included in the rollup portfolio.
Target date field	For date metrics, a target date field is shown in the **Item Target** section.
Target duration field	The target duration is the number of days against which the variance is measured.
Portfolio variance threshold list	Indicates if the goal to be reached for the portfolio is over or under a specified threshold.
Under and **Over** fields	Minimum and maximum percentage for the portfolio variance threshold.
Absolute value field	For rollup portfolios. If selected, forces the portfolio value to be a positive value.

About adding and removing portfolio items

You can add or remove portfolio items (projects or other portfolios) to or from a portfolio manually.

You can also set up a portfolio so that items are added and/or removed automatically based on filter criteria that you define. Items that match the filter criteria are automatically added, and items that no longer match the criteria are automatically removed.

> **Warning:** If you set up items to be added automatically, the portfolio can grow very large over time. A warning message is displayed to inform you that the amount of data increases the portfolio data calculation time. If this occurs, you must refine the filter criteria.

Adding or removing projects to or from portfolios only affect evaluations from the current period forward.

Adding a project to a project portfolio

You must first define filter criteria to determine which projects you can add to a portfolio. You can filter by project, scenario or SQL statement.

1. Access the project portfolio.
2. Click **Actions** > **Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click the **Items** tab.
4. In the **Select a filter** list, select the filter option.
5. Select the filter criteria.
6. Click **Go**.

   The items that match the filter criteria appear.
7. Do one of the following:
   - To apply an equal weighting to all items, in the column, click the row of each project.
   - To apply different weighting to each project, click in each row of the **Weighting** column and enter the weighting.
8. To automatically add new items that match the filter criteria to the portfolio, select the **Auto-add** check box.
9. To automatically remove items that no longer match the filter criteria from the portfolio, select the **Auto-remove** check box.
10. Click **Save**.

Adding a project portfolio to a rollup portfolio

You filter criteria to determine which portfolios you can add to a rollup portfolio. You can filter by portfolio, or SQL statement.

1. Access the rollup portfolio.
2. Click **Actions** > **Edit portfolio.**

   The **Edit Portfolio** dialog box appears.

3. Click the **Items** tab.
4. To filter the list of portfolios to be added to a rollup portfolio, select the criteria in one or more fields.
5. Click **Go**.

   The tab displays the items that match the filter criteria.
6. Do one of the following:
   - To apply an equal weighting to all items, in the column, click the row of each project.
   - To apply different weighting to each project, click in each row of the **Weighting** column and enter the weighting. To change these weighting values to equal weighting for all projects, click .
7. To automatically add new items that match the filter criteria to your rollup portfolio, select the **Auto-add** check box.
8. To automatically remove items that no longer match the filter criteria from your rollup portfolio, select the **Auto-remove** check box.
9. Click **Save**.

Overriding metric thresholds for projects in portfolios

By default, the thresholds set for each metric are applied to each project in a portfolio. You can override these thresholds for individual portfolios which require specific thresholds not defined in the original metric. You can, for example, define lower thresholds for strategically important projects.

1. Access the portfolio.
2. Click **Actions** > **Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click the **Metrics** tab.
4. Click the metric in the table.

5. Make the necessary changes. For more information, see "Create/Edit Portfolio dialog, Metrics tab options" on page 13.
6. To validate the changes, click **Update**.
7. Click **Save**.

Overriding metric thresholds for portfolios in rollup portfolios

By default, the thresholds set for the metrics used in rollup portfolios are applied to each project in the rollup portfolio. However, you can override these default thresholds and use the thresholds from individual project portfolios instead.

1. Access the portfolio.
2. Click **Actions > Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click the **Metrics** tab.
4. Click a metric in the table.
5. Make the necessary changes. For more information, see "Create/Edit Portfolio dialog, Metrics tab options" on page 13.
6. To validate the changes, click **Update**.
7. Click **Save**.

Selecting custom stored procedures for portfolio health

If you use custom stored procedures to monitor portfolio items, you can select the custom stored procedure to override the standard health calculation for portfolio items and the overall health of portfolios.

1. Access the portfolio.
2. Click **Actions > Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click the **Health** tab.
4. In the **Portfolio item health** list, select the custom stored procedure to monitor the health of portfolio items.

5. In the **Portfolio overall health** list, select the custom stored procedure to monitor the overall health of the portfolio.
6. Click **Save**.

About editing portfolios

After a portfolio has been saved, you can change the item filter criteria, add or remove items, change the weightings of the items included in the portfolio or change the metric weighting on the portfolio. You can also edit metric thresholds for an item, and edit the information in the code and text fields.

When editing rollup portfolios:

- After you add portfolios to a rollup portfolio and save the rollup portfolio, you can update or delete metrics, but you cannot add new metrics.
- The **Items** tab displays the SQL query of the portfolio selection criteria.
- If no fiscal period is specified for the rollup portfolio at the time it is saved, and portfolios with projects associated to different billing offices are added to the rollup portfolio, you cannot edit the **Fiscal period** field. Only portfolios with the same fiscal period specified in the rollup portfolio are available to be added to the rollup portfolio.

Editing item filter criteria for a portfolio

1. Access the portfolio.
2. Click the **Items** tab.
3. In the **Select a filter** list, select the filter option.
4. Redefine the selection criteria of the items included in the portfolio.
5. Click **Save**.

Removing an item from a portfolio

If the **Auto-remove** check box is selected, the items that no longer match the filter criteria will automatically be removed from the portfolio. If the check box is cleared, you must remove the items manually.

1. Access the portfolio.
2. Click **Actions** > **Edit portfolio.**

The **Edit Portfolio** dialog box appears.

3. Click the **Items** tab.
4. Clear the check box in the first column for the item that you want to remove.
5. Click **Save**.

Removing a metric from a portfolio

When you remove a metric from a portfolio, it is removed from all items in the portfolio. You cannot delete metrics from a project portfolio that is included in a rollup portfolio.

1. Access the portfolio.
2. Click **Actions > Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click the **Metrics** tab.
4. Select a metric in the table and click the **Delete** button.
5. Adjust the weightings of the remaining metrics so the weightings equal 100%.
6. Click **Save**.

   If weightings do not equal 100% as a result of deletions, a message appears reminding you that weightings must equal 100%.

Deleting a portfolio

1. Access the portfolio.
2. Click **Actions > Edit portfolio.**

   The **Edit Portfolio** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

3. Accessing Portfolios

About the portfolio profile

The portfolio profile is a report of the performance of a portfolio and its items, based on assigned metrics and weightings. Colored performance indicators allow you to quickly assess the health of the portfolio.

Performance overview of portfolio items

The **Project and metric status** (for project portfolios) or **Item and metric status** (for rollup portfolios) sections display the performance status of the portfolio items for all assigned metrics.

Column or Icon	Description
Project or Portfolio item	Name of the project or portfolio item.
Current phase	Latest phase for which there is actual time for a task as of the last project rollup.
Current Status	Status of the project.
Competitor	Indicates that there is a competitor for the opportunity.
Weighting	Weighting of the item in the portfolio.

Portfolio summary

The **Portfolio summary** section displays the overall health for the portfolio items and the actual data for all assigned metrics. The following table defines the rows in the section:

Row	Definition
Project actuals	Sum of the actual data for each item in the portfolio. For rating metrics, an average is displayed. For user-defined metrics, a sum or an average is displayed, depending on the rollup method specified in the metric template.
Engagement request actuals	The sum of actual request time for engagements related to the portfolio. If the request does not have a project selected, cost or effort is based on request time booked to engagements that are associated with the projects in the portfolio.
Total actuals	The project actuals plus engagements request actuals.
Portfolio target	The sum of all item targets in the portfolio (for cost, billing and effort). • For schedule metrics, it is the maximum target value (such as, the latest end-date target). • For rating metrics, it is the average target value (such as, average rating target for all the projects). • For user-entered metrics, the rollup method (sum or average) specified for the metric template is used.
Portfolio variance	The total actuals minus the portfolio target. The numbers are color-coded to indicate the performance status.

Filtering the data on the portfolio profile

You can filter the data to display only a subset of the portfolio information that displays on the profile.

1. Access the portfolio profile.
2. Click **Actions** > **View** > **Data filter**.

   The **Data Filter** dialog box appears.
3. In the **Fiscal year** and **Fiscal period** lists, select the fiscal periods.
4. In the **Project status** field, select the status of the projects you want to view.

5. Click **Go**.

   The profile displays the data that matches the filter criteria.

Working with portfolios in the Portfolio Performance Management portlet

1. Access the portfolio.
2. Do one of the following:
   a. Click **Actions** > **Add to portlet**.

      The portfolio is added to the portlet.

   b. Click **Actions** > **Remove from portlet**.

      The portfolio is removed from the portlet.

4. Analyzing Portfolio Performance Results

About the portfolio score card

The portfolio score card displays the overall health of each item in a portfolio and a breakdown of the metric information (actual, target, variance and weighting) and results for all items in the portfolio.

Example of overall health calculation

The overall health of a portfolio item is based on the metric indicators multiplied by its weighting:

Metric indicators – Green = 1, Yellow = 2, Red = 3

Metric weighting by item:

- Cost metric – weighting is 35%, yellow
- Effort metric – weighting is 25%, red
- Schedule metric – weighting is 40%, green

The overall health is:

Cost (2*.35) + Effort (3*.25) + Schedule (1*.40) = 1.85 (Yellow)

The logic is as follows:

- If the result is greater than 0 and less than or equal to 1, the performance status = Green
- If the result is greater than 1 and less than or equal to 2, the performance status = Yellow
- If the result is greater than 2 and less than or equal to 3, the performance status = Red
- If there is no result, no performance status is displayed.

Accessing the score card of a portfolio

1. Access the portfolio.
2. Click **Actions** > **View** > **Score card**.

   The score card of the portfolio appears.

Accessing the score card of a portfolio item

1. Access the portfolio.
2. Expand the **Project and metric status** (for project portfolios) or the **Item and metric status** (for rollup portfolios) section.
3. Click the colored performance indicator in the row of a specific item.

   The score card of the item appears.

Viewing a metric profile

You can display the metric profile for any of the metrics added to the project portfolio or rollup portfolio. The metric profile displays general information about the metric and shows the thresholds and status for each project in the project portfolio or rollup portfolio.

1. Access the portfolio.
2. Expand the **Project and metric status** (for project portfolios) or the **Item and metric status** (for rollup portfolios) section.
3. Select the column heading for the metric you want to display.

   The metric profile appears.

Creating a metric knowledge item

You can add knowledge items to metrics added to portfolios. Knowledge items are listed in the **Related knowledge** section of the score card.

1. Access the score card of a portfolio item.
2. In the row of the metric, click .

   The **Create Knowledge Item** dialog box appears.
3. Complete the fields as required. For more information, see "Create/Edit Knowledge Item dialog, General tab options" in the *User Basics User Guide*.

About the portfolio what-if analysis

The what-if analysis functionality allows you to evaluate alternative possibilities for a portfolio.

For example, if your organization aims to reduce costs, you can filter high cost projects to evaluate the cost level for the remaining projects in the portfolio. You can then create a new portfolio or scenario, to be analyzed at a later date, with only the remaining projects. Portfolios and scenarios created from a what-if analysis are linked to the original portfolio, so that you can refer back to the original data, if needed.

For each project or project portfolio, the what-if analysis view displays the target, actuals and variance for each metric.

Accessing the what-if analysis view

1. Access the portfolio.
2. Click **Actions** > **View** > **What-if analysis**.

   The **What-if analysis** view appears.

Creating a portfolio from a what-if analysis

You can create a project portfolio or rollup portfolio from the results of a what-if analysis. The new portfolio contains all the information of the original portfolio (metrics, weightings, thresholds) but includes only the items that you selected in the what-if analysis.

1. Access the what-if analysis view.
2. Select the rows of the items that you want to include.
3. Do one of the following:
   - To create a project portfolio, click **Actions** > **Create** > **Project portfolio**.
   - To create a rollup portfolio, click **Actions** > **Create** > **Rollup portfolio**.

   The **Edit Portfolio** dialog box appears.
4. Complete the fields as required. For more information, see "Creating a portfolio" on page 10.
5. Click **Save**.

Creating a scenario from a what-if analysis

You can create a portfolio scenario from the results of the what-if analysis. Portfolio scenarios display in the **Scenario** section on the portfolio profile view.

1. Access the what-if analysis view.

2. Select the rows of the items that you want to include.
3. Click **Actions** > **Create** > **Scenario**.

   The **Scenario** view appears.
4. Complete the fields as required. For more information, see "Scenario view options" on page 28.
5. Click **Actions** > **Save**.

Scenario view options

Fields	Description
Scenario name field	Name of the scenario.
Description field	Description of the scenario.
Benefits field	Benefits of the scenario.
Risks field	Risks of the scenario.
Sponsor type-ahead field	Resource who is backing the portfolio.

Accessing a portfolio scenario

1. Access the portfolio.
2. Expand the **Scenario** section.
3. In the **Scenario** column, click the scenario.

   The scenario appears.

Accessing the project Gantt chart for portfolio projects

The portfolio Gantt chart provides a rolled up summary of the project budget, based on the forecast schedule information for the project.

1. Access the portfolio.
2. Click **Actions** > **View** > **Gantt chart**.

   The Gantt chart appears in a new window.

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