



IBM Rational Portfolio Manager

Highlights

- ***Extends visibility and control over portfolios and projects***
- ***Enables streamlined software delivery and lifecycle management***
- ***Improves governance through development accountability***

Prioritize and manage your IT investments in alignment with business goals

Software and systems portfolios are dynamic. Because portfolio health is affected by the direct and indirect dependencies between new and existing projects, conflicts inevitably arise between what's good for an individual project and what's good for overall portfolio success. To deal effectively with these conflicts, you need a holistic approach that integrates portfolio and program oversight with project lifecycle management. The resulting end-to-end visibility and control enable you to better manage your portfolio by:

- *Selecting projects and programs that are aligned with the organization's goals and strategies.*
- *Applying available resources to the highest-priority projects.*
- *Regularly assessing how the projects and programs are contributing to portfolio health.*
- *Taking action to keep the portfolio in compliance with business objectives.*

IBM Rational® Portfolio Manager software integrates project and portfolio management to help you put your business strategies into practice. Using the Rational Portfolio Manager application, you can align your business priorities, processes and people into one cohesive environment for a comprehensive view of your existing and proposed IT investments.

From opportunity identification and prioritization to requirements gathering and solution deployment, all specified stakeholders in the software and systems delivery process can see how funding aligns with business goals and how projects are performing relative to expected results. These stakeholders can cross levels and functional areas, including the line-of-business executives who drive business strategy; the software development program managers who enable that strategy; the project managers who are accountable for day-to-day project execution; and the individual team members who perform the work.

IBM provides this extended visibility into your technology projects. A top-down view enables you to monitor performance against financial objectives, resource commitments and skills inventories across programs and projects. A bottom-up view allows you to track project-level activities and results. You're able to make more coordinated and informed investment decisions based on objective data. You have the information you need to help ensure that IT investments are aligned with business priorities. And you can maintain this alignment through improved governance over project and process execution.

Improve decision making with enhanced visibility

IBM Rational Portfolio Manager software captures the details of project and proposal scope, schedules, finances and resources in a shared repository to support both portfolio planning and project execution. Key decision makers are able to set the desired investment balance of projects and people based on real-time information. Project managers can efficiently track project status, allocate resources, establish realistic schedules and address compliance with internal and external mandates. The entire organization remains synchronized with strategic objectives.

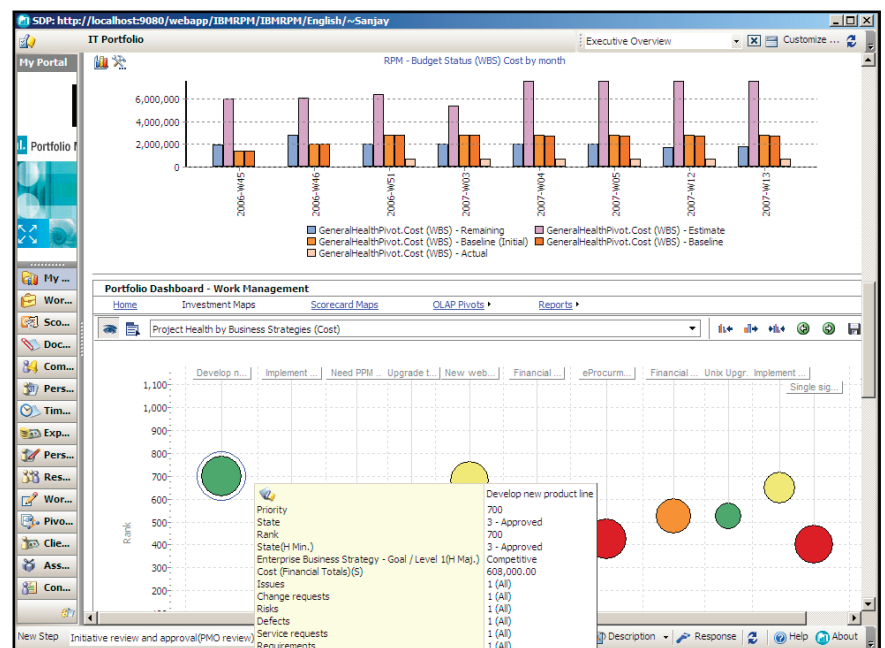
Comprehensive dashboard decision support

When evaluating the current project mix against new opportunities, it's vital to know whether the portfolio is meeting its objectives, as defined by the established business decision criteria. The assessment process needs to examine the performance of individual projects and the portfolio as a whole.

The comprehensive Rational Portfolio Manager dashboard captures and synthesizes complex project and portfolio metrics into a variety of formats, including investment bubble maps, scorecards, comparison tables and status reports. You can use these views and reports to analyze your portfolio health and value contribution based on the performance indicators you've established. For example, using the scorecard capabilities, you can assign each project threshold a status of green, yellow or red to see at a glance which projects are producing expected business results.

With Rational Portfolio Manager, Version 7.1 software, an optional relational database is available to integrate information, enabling you to perform trend analysis utilizing all the data sets on which you currently run pivots and reports. In addition, you can access standard reporting tools to perform ad hoc inquiries as required, without having to involve IT.

Additionally, Rational Portfolio Manager software integrates with IBM Rational ProjectConsole™ software to expand trend analysis for a more accurate assessment of general project health. This integration allows you to include relevant data from other sources, such as IBM Rational ClearQuest® and IBM Rational RequisitePro® software, as well as third-party tools. You can gain a more holistic picture of what's going on with early warning capabilities that use trending data on all the elements impacting the projects in your portfolio.



The Rational Portfolio Manager dashboard captures and expresses complex project metrics, helping you analyze portfolio health and value contribution.

Capacity and resource management across geographically distributed teams

Proper resource management begins with understanding your current resource utilizations and available skills at the organizational level. Consolidating projects into a single repository helps you gain the visibility needed for optimal allocation of your human and technology assets. You're able to determine whether current and planned resources are adequate for achieving portfolio and project objectives, and you can assess current and future needs. In addition, you can quickly identify resource surpluses or shortages, and formulate redistribution plans.

Essentially, you have a global reservation system of resources based on demand and supply. For example, if a project requires English-speaking people with Linux® skills, you can initiate a search across all available resources, or focus on developers already assigned to the project. In this way, you can quickly and efficiently distribute individual and team workloads, and help ensure that critical resources are working on high-priority projects.

Integrated project financial management and time and expense reporting

Once projects are approved and funded, project managers are able to estimate capital costs and consumable budgets, and then phase these estimates across the life of the project. Project managers can select, plan and budget for projects and programs annually and periodically.

Top-down budgeting is linked to automated, bottom-up reporting of expenditures including time, expenses, assets and depreciation. To facilitate the capture and tracking of incurred and committed expenses, project team members can enter time and expense information against appropriate accounting charge codes via an intuitive Web time and expense entry and reporting interface. Rational Portfolio Manager software calculates the remaining expense budget for each charge code and displays the associated budget variance. At any time, you can have the most current information for project and portfolio monitoring and management.

Streamline software delivery and lifecycle management

Rational Portfolio Manager software provides you with the framework to move smoothly from high-priority ideas and initiatives into measurable programs and projects. You're able to leverage and reuse optimized engagement models, project plans, process templates and work products with drag-and-drop ease—helping to ramp up new projects quickly. And, because these models, plan templates and work products are designed to help address complex, geographically distributed development operations, you're equipped to enforce your governance policies and best-practices processes consistently and efficiently across the project team—no matter where team members are located.

Reusable method content and process definitions

Rational Portfolio Manager software integrates with IBM Rational Method Composer software to help you quickly scope projects with reusable objects and process templates that you can use out of the box or customize to address a diverse set of project needs and development styles. The IBM Rational solution uniquely separates reusable core method content from process definitions. This separation helps maximize your flexibility to tailor processes as organizational and individual project needs dictate. You're able to support different types of development efforts, adapting the process to the size and distribution of the project team; to the disparate systems and complexity of the applications being developed; and to compliance requirements.

Automated best-practice processes

Integration with Rational Method Composer software enables you to enforce consistent performance worldwide through automation of repeatable, best-practice processes. This process predictability and control helps improve manageability throughout the project lifecycle.



Manage risks and issues proactively

Rational Portfolio Manager software provides a central location for risk documentation. Each identified risk event is described and measured based on its impact, probability and precision rankings in the provided Risk Ranking Matrix.

When risk events occur, the identified risk owner is automatically notified via e-mail. The owner can then set closure criteria describing what must happen in order for the risk to be mitigated. In this way, issues pertaining to the project are identified, logged and responded to by generating actions that are tracked to completion.

Accelerate success with IBM services

IBM Rational software is supported by an extensive worldwide staff of professional services consultants who bring years of experience to help you lay a solid foundation for successful software development projects. You can

engage IBM professional services for a variety of scenarios—from large-scale customized consulting projects that are tailored to meet your organization's unique needs, to short-term assistance with a single challenge.

For more information

To learn more about how IBM Rational Portfolio Manager software can help you govern and manage software and systems delivery in alignment with business goals, visit:

ibm.com/software/rational/offerings

© Copyright IBM Corporation 2007

IBM Corporation
Software Group
Route 100
Somers, NY 10589
U.S.A.

Produced in the United States of America
06-07
All Rights Reserved

ClearQuest, IBM, the IBM logo, ProjectConsole, Rational and RequisitePro are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries or both.

Linux is a registered trademark of Linus Torvalds in the United States, other countries or both.

Other company, product and service names may be trademarks or service marks of others.

The information contained in this documentation is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this documentation, it is provided "as is" without warranty of any kind, express or implied. In addition, this information is based on IBM's current product plans and strategy, which are subject to change by IBM without notice. IBM shall not be responsible for any damages arising out of the use of, or otherwise related to, this documentation or any other documentation. Nothing contained in this documentation is intended to, nor shall have the effect of, creating any warranties or representations from IBM (or its suppliers or licensors), or altering the terms and conditions of the applicable license agreement governing the use of IBM software.