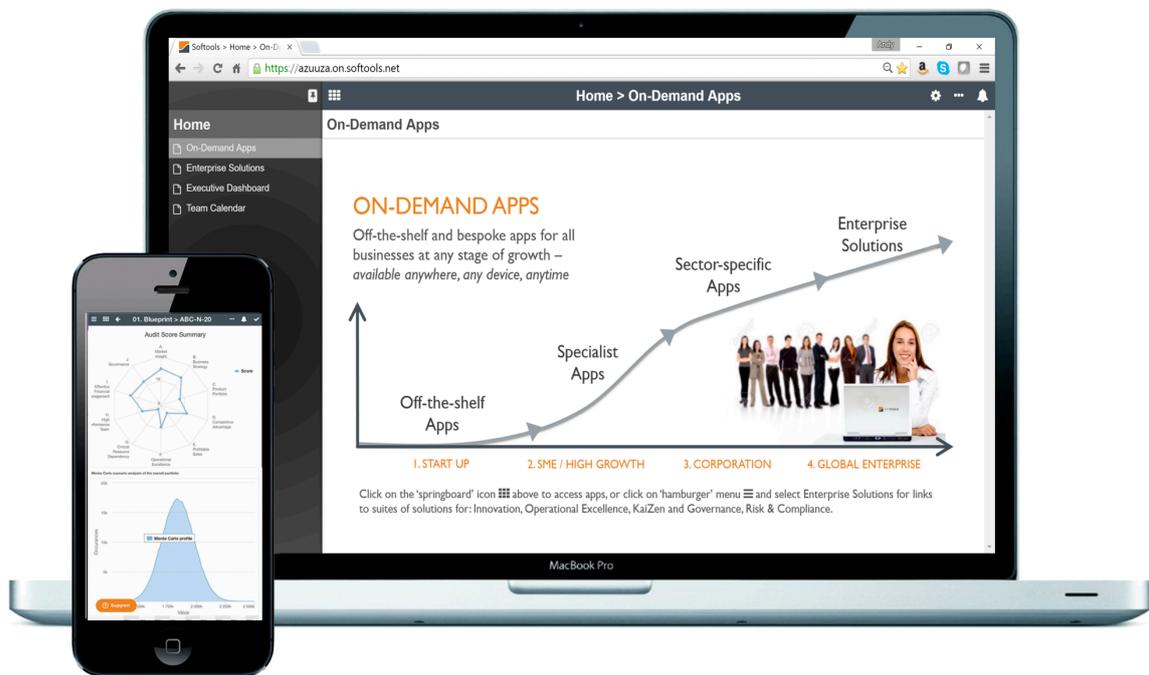




# PORTFOLIO MANAGER Apps Catalogue 2018



*Secure, scalable business apps running in the cloud*



# PORTFOLIO MANAGER



Portfolio Manager is a comprehensive suite of apps for managing multiple initiatives in any business. It provides a complete solution for Program and Project Managers to get visibility and control of all the key elements involved in the management of an organisation portfolio. The suite is based on a set of CORE and EXTENDED apps. The **Core** apps provide the essential tools to 1. Track and assess all new project ideas before approval as part of the project pipeline and 2. Guide project management planning to ensure all key information for every project is captured in order to manage each stage effectively from define to closure in a consistent way. This facilitates progress review and assessment of the outcomes and benefits achieved at any stage through snapshot summaries and dashboard views of status.

The **Extended** apps provide the means to cover all other processes needed to guide and sustain effective project management. Strategic context and alignment is ensured through a Blueprint app that confirms scope of the portfolio to clarify the boundaries of what will and what will not be included. Proper governance is assured by a Project Governance Routines app and a Project Review Boards app – establishing the means to maintain common and consistent practices through implementation. Performance against strategic goals and resolution of critical issues are completed by KPI and RAID apps. Organisation capability is systematically developed and reviewed via the Maturity Audit app. All key people resources required to meet skills/ knowledge requirements as well as definition of project roles are identified and managed through a Project Champions app.

## PORTFOLIO MANAGER is a suite of web / mobile apps for managing all aspects of Program, Portfolio and Project Management

 <p><b>PROGRAM BLUEPRINT</b></p>	<p>The Program Blueprint provides a complete picture of the business context that will drive all PPM activity. Specifically, the app gives sharp focus on plans for all parts of the business in order to help determine the key change Programs and Projects required to achieve growth targets. The Blueprint also provides an assessment of the current maturity of the Project and Portfolio Management capabilities of the business unit.</p>
 <p><b>IDEA FUNNEL</b></p>	<p>The Ideas Funnel app provides a swift means to capture and assess any new concepts relating to products, processes and people that will contribute to the successful delivery of strategy. Key details about the value of the idea and source of the proposed change are recorded and used to provide information for any initial go/no go screening plus scale of resource and costs required.</p>
 <p><b>PROJECT PLAN</b></p>	<p>The Project Plan app provides the means to define and plan the projects identified as a result of any planning or assessment activity. These projects require planning time and resource to ensure that the goals in terms of time, cost and performance can be achieved. The app provides a simple and easy-to-use structure, for project leaders and teams, to help to plan and implement a project, as well as track delivery of the benefits. It also facilitates review through loca stage and gate processes such as DMAIC (Define-Measure-Analyse-Improve-Control).</p>
 <p><b>PROJECT AUDIT</b></p>	<p>The Project Audit App is used to gauge the current status of active projects against a key set of assumptions. This ensures comprehensive tracking of all projects on a routine (monthly) basis and allows needed changes to keep or get the project back on track to be made quickly and thereby optimise overall program and project delivery.</p>

 <p><b>PROJECT CHAMPIONS</b></p>	<p>The Project Champions app provides a full register of all the project resources by location and capability level to make sure that the business has the right people in the right place to achieve the PPM goals. It guides personal skills development planning and aligns this activity to the PPM resource requirements to make sure that people with the right skills are available for roles of Project Leaders, Sponsors and Champions.</p>
 <p><b>PPM KPI DASHBOARD</b></p>	<p>The PPM KPI dashboard app provides a summary of all the PPM performance outcomes by each of the KPIs. It is used for tracking and reviewing performance at Program or Portfolio level to gauge overall success against the Program Blueprint or roadmap. It monitors and reports on monthly indicators, compares them against expectations using a five-point scale to assess trends and current RAG status; where R is Red (major concerns and corrective action required), A is Amber (risks need to be monitored closely), and G is Green (on-track).</p>
 <p><b>GOVERNANCE ROUTINES</b></p>	<p>The Governance Routines app captures all the key information and outputs for each daily and weekly routine. These essential activities can be tracked by activity, process and location to facilitate review. Performance against KPIs is an integral part of this process and includes checklists by type of routine in order to quickly show current status and what actions are needed to ensure progress.</p>
 <p><b>PROJECT REVIEW BOARDS</b></p>	<p>The Project Review Boards app ensures Boards (or ‘Steering Committees’) have the right information presented in the right format to the right people (decision makers) to identify and take action to resolve program and project issues to ensure the time, cost and performance targets can be achieved. Information shows what is expected (target KPIs), what was actually delivered, and identifies specific areas where there is a gap between the two represented as Red or Amber indicators.</p>
 <p><b>RAID REGISTER</b></p>	<p>The RAID (Risks, Actions, Insights, Decisions) Register app is used to identify, manage, and resolve Issues. It is a core application for any business operation or project team, as it provides the basis for tracking performance improvement actions, collaborating across functions and key stakeholders, and sharing knowledge or insights.</p>
 <p><b>PROGRAM KNOWLEDGE CUBE</b></p>	<p>The Knowledge Cube app gives you a central repository – a ‘one-stop shop’ to review and use all of your in-company as well as external PPM expertise. It fosters the capability to make better use of this knowledge when it counts. Subject Matter Expertise across for PPM can be quickly accessed via the Knowledge Cube through a number of channels – expert voice; practitioners’ tips; articles; useful web links and a range of other sources. These sources make it easier for any user to retrieve vital information speedily to support their Project work.</p>
 <p><b>VISUAL DASHBOARDS</b></p>	<p>The Visual Dashboard is used for reporting on the performance of all programs and projects. It is used at the Project Review Board to report on key performance and progress data. Historically these Visual Dashboards were paper based, but increasingly are now configured to show real-time data in visual charts and dashboards available on any device from interactive LCD screens to tablets and smart phones.</p>

There are 100s of other PPM **ON-DEMAND APPS** .....if you don't see what you need, then please ask!

# CORE FEATURES

All apps reflect a common DNA – building blocks that deliver Executive visibility & control, and embed industry best practices across all teams:

WELCOME



KT-Softtools runs in a secure and scalable cloud

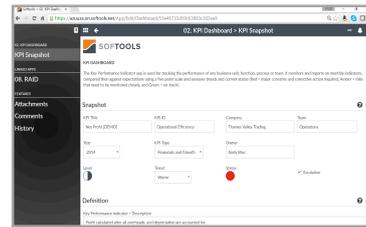
Security determines what you can see

Permissions will determine what you can do

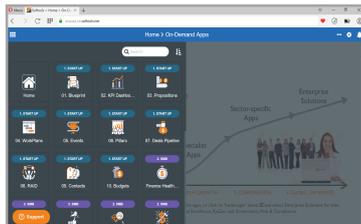
New sites set up in minutes

WEB FORMS

Web forms reflect the business process  
 Data input fields in Templates & web Forms  
 Input fields in any language and workflow  
 Data entered manually, via csv or via APIs



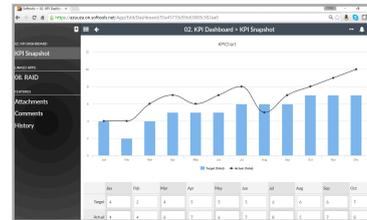
SPRINGBOARD



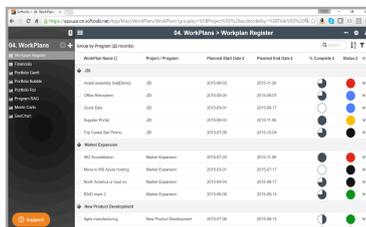
Single point of access for apps  
 Custom apps available on request  
 Administrator menu options  
 App Builder menu options

CHARTS

Data views in a graphical format  
 All charts enable drill-down to detail  
 All chart types supported  
 Charts at a record or portfolio level



REPORTS



Standard real-time view of your data  
 Basis of performance reviews  
 Agile search & grouping capability  
 Quick edit & drill-down to detail

DASHBOARDS

Visual Dashboards with multiple charts  
 Executive visibility, control & confidence  
 Stand alone or linked to other systems  
 Option for auto-feed from IOT devices



# KEY FACTS

## ACCESS

Access to the platform is via any modern browser (IE11, Edge, Chrome, Safari, Firefox, Opera+). The platform is mobile-optimised and so can be accessed on any device from PCs and tablets to Smartphones. Off-line capability is enabled using csv export and import routines, or linked-in native apps.

## APPS COMPLEXITY

Applications can range from simple list-based stand-alone apps (e.g. Risk Register), to complex apps (e.g. Supply Chain Assessment) that are linked together, driven by workflow and synchronised to 3<sup>rd</sup> party systems via APIs.

## APP BUILD

Certified AppBuilders use the integrated AppStudio to design, configure and deploy apps using a systematic process in hours and with zero coding.

## BUSINESS CONTINUITY

The platform is used by many of the world's leading organisations and Governments, and so data is always held in a secure encrypted environment, controlled by clients and exported at any time.

## DATA INPUT

CSV import is used to complete a one-off migration of client data during set-up. Then data is entered into the platform in 3 ways: 1) manual data input, 2) export / import via csv, and 3) real-time data synchronisation with 3<sup>rd</sup> party systems via WebHooks / APIs.

## DATA VALIDATION

Data field parameters and logic based on field type will validate data input is consistent and complete. Specific fields can be set to be mandatory. Specific input forms can be visible or hidden using workflow based on user team or field values.

## INFRASTRUCTURE

The platform is deployed in a web hosting environment as single-tenant or multi-tenant. Our default hosting partner is MS Azure and so deployments are instantly secure, scalable and stable.

## INTEGRATION

The Softools API is a JSON-based (JavaScript Object Notation) RESTful API with authentication via "OAuth

2.0 Resource Owner Password" flow with support for refresh tokens.

## LANGUAGES

The platform is configured to enable the dynamic translation feature in modern web-browsers (e.g. Google Translate). This allows users in different regions & countries to work on a common platform in their own language. It is also possible for App Builders to 'hard code' all system labels in local languages.

## PERFORMANCE

Speed of access is largely determined by the bandwidth of local wireless & wired network connections or via 3G & 4G mobile networks. The size of the app will also determine how much data is transferred and will impact speed, as will the proximity of the database to the user (latency). Dramatic advances in web technology continue to enable faster data transfer speeds globally, and the potential to work off-line.

## SCALE

The platform can scale from 1 app and user to 1,000s of apps and over 1,000,000 users for a single client.

## SECURITY

Softools is used by banking, military and nuclear organisations world-wide and can be locked down to any level. Access to the platform is on a named user basis which determines what a user can see (security) and what they can do (permissions). Single Sign-On (SSO) is available as an option.

## SUPPORT

Users gain first line support from on-screen help. Second line support is provided by internal Administrators. Third line support is provided to certified Administrators via phone, email and WebEx.

## TRAINING

Users and App Builders are trained via webinars or in workshops using an 'action learning' approach:

**Level 1** - Basic User (2 hours)

**Level 2** - Super-Users / Administrators (+2 hours)

**Level 3** - Site Administrators (+2 hours)

**Level 4** - Basic App Builders (+ 1 day), and

**Level 5** - Advanced App Builders (+ 2 days).

