PORTFOLIO MANAGER

Apps Catalogue 2018

ON-DEMAND APPS
Off-the-shelf and bespoke apps for all businesses at any stage of growth – available anywhere, any device, anytime

Secure, scalable business apps running in the cloud
PORTFOLIO MANAGER is a suite of web / mobile ‘apps’ for managing all aspects of Program, Portfolio and Project

SOLUTION OVERVIEW

Portfolio Manager runs on the Softools secure and scalable web platform, and deliver an integrated suite of ‘apps’ that enable you to:
- Identify and capture opportunities for performance, process and product improvement (‘ideation’)  
- Assess, screen and prioritise opportunities against business, operational and financial criteria  
- Plan the activities, resources and budgets required for successful delivery of benefits – on-time and in-budget  
- Control progress and performance improvements from the go-live to project completion and benefits realisation – including the management of the team and the resolution of critical Issues and Risks

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<tr>
<th>BUSINESS CONTEXT</th>
<th>RETURN-ON-INVESTMENT</th>
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<td>Businesses in all sectors face increasing competition where margins are tight</td>
<td>Apps provide a common approach based on best industry practices – a complete solution from end-to-end</td>
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<td>Busy leaders are busy and constantly seek opportunities to manage more effectively and efficiently</td>
<td>Performance dashboards deliver real-time Executive visibility, control &amp; confidence</td>
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<td>But…. current IT systems are often poorly designed, based on old technologies, not integrated and difficult to use</td>
<td>The platform can be accessed from any device from PC and tablet to smartphone - anywhere, any time</td>
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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>| PROGRAM BLUEPRINT | 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. |
| IDEA FUNNEL | 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. |
| PROJECT PLAN | 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 local stage and gate processes such as DMAIC (Define-Measure-Analyse-Improve-Control). |
| PROJECT AUDIT | 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>
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<td><strong>PROJECT CHampions</strong></td>
<td>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.</td>
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<td><strong>PPM KPI Dashboard</strong></td>
<td>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).</td>
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<td><strong>Governance Routines</strong></td>
<td>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.</td>
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<td><strong>Project Review Boards</strong></td>
<td>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.</td>
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<td><strong>RAID Register</strong></td>
<td>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.</td>
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<td><strong>Program Knowledge Cube</strong></td>
<td>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.</td>
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<td><strong>Visual Dashboards</strong></td>
<td>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.</td>
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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:

KT-Softools 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 3rd 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 3rd 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 if 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 in 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).