

DDaT23039 – UKSBS Portfolio Tooling

Systems and Technical Specification

UK SBS PPM Tool	Must be Cloud, SaaS product	Must
Time management		Must
Record time	Able to capture users time against CI, Projects, Programmes and BAU	
Configurability	Ability to track time against different configurable like work type and resource type	
Usability	Easy and quick for users to capture activities and time	
Approvals	PMs or Change Owners have ability to approve time sheets as one activity, rather than individual approvals	
Access control	PMs or Change Owners can control the individuals recording time against their activity	
Demand & Resource management		Must
Resource capacity planning	use of scenarios to plan and analyse impacts for future portfolio, programmes and projects	
Project, Programme, Portfolio demand and scheduling	Add new ideas to portfolio planning	
Project, Programme, Portfolio demand and scheduling	Schedule Portfolios, Programmes and Projects to assess capacity of UK SBS and ability to deliver	
Prioritisation	Add in prioritisation criteria and weightings, then order Programmes and Projects into ranked order	
Task management		Should
Task Planning & Management	The ability to plan & manage work on a task basis	
Project planning and management		Should
Project Risk Management	Captures risks, issues and mitigations for projects. Is version controlled	
Financial Management	can capture all project costs at different stages (ROM, Forecasts, Actuals) and version control changes. Plan costs across financial years. Captures different funding streams for each element of a project	

Project collaboration	ability to collaborate with project team, share collateral
Templates	Able to create templates for business cases, impact assessment, PID
Dependencies	Captures dependencies between projects
Project planning	Create a project plan, iterate and share it
Benefit mapping	identification of benefits

Programme management		Should
Create Programmes	create various programmes with ability to capture metadata about each and identify projects that sit within a programme. Capture overall status of Programme	
Programme Risk Management	Captures risks, issues and mitigations for programmes. Is version controlled	
Financial Management	roll up CI, project costs into a programme view	
Programme collaboration	ability to collaborate with project team, share collateral	
Templates	Able to create templates for Programmes (Blueprint etc)	
Dependencies	Captures dependencies between projects and other programmes	
Programme planning	Create a programme plan, iterate and share it	
Benefit mapping	identification of benefits	

Portfolio management		Should
Create portfolios	create various portfolios with ability to capture metadata about each portfolio. Capture overall status of Portfolio	
Portfolio Risk Management	roll up project and programme risks. Also identify specific portfolio risks. Capture overall Risk status of portfolio	
Financial Management	roll up CI, project, programme costs into a portfolio view	
Portfolio collaboration	ability to collaborate with portfolio owner & team, share collateral	
Benefit mapping	identification of benefits	

Reporting services		Must
External reporting services	Must specify Powerbi as a reporting service	

Security and user management		Must
Account creation	capability of using Okta for user login	
Role based access	ability to set different access per role type	

Integration		Must
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API	API as standard to allow integrations to systems such as our Change Portal app	
Usability		Must
Workflow management	The product must have workflow capability that supports business process	
Import/Export	Must be able to import/export data from other systems	

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