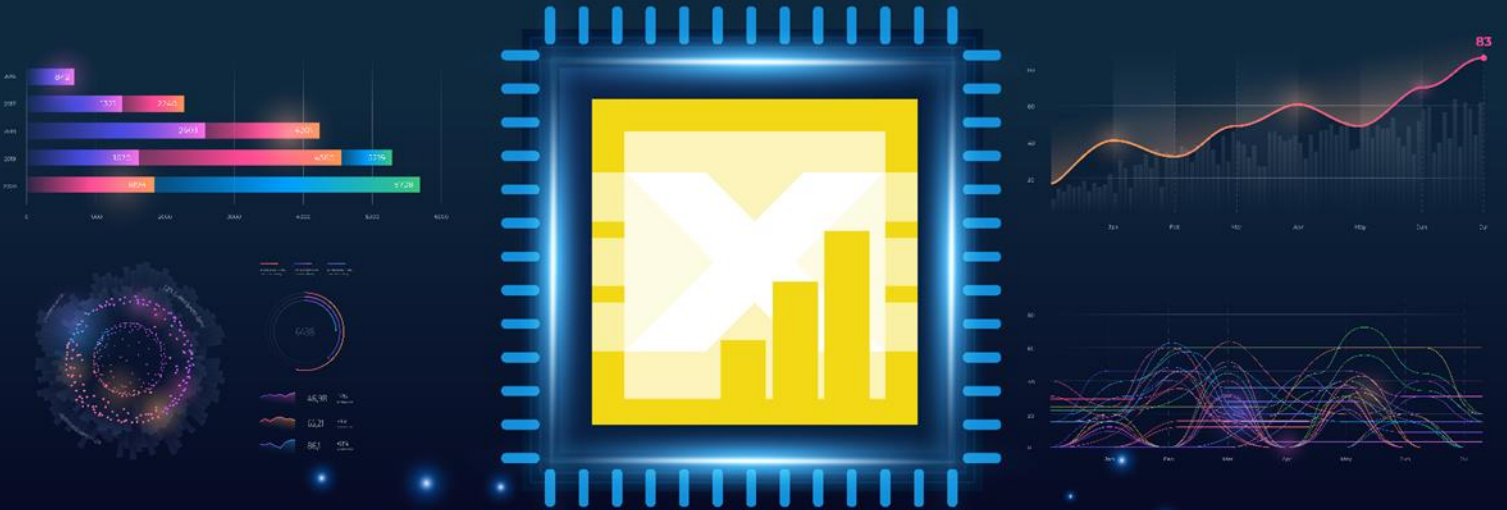




BEXEL PORTFOLIO MANAGER



Instructions



cloud-based solutions

BEXEL Portfolio Manager 1.0 instructions

01. Publish project to BEXEL Portfolio Manager

To publish the project to BEXEL Portfolio Manager, please install BEXEL Portfolio Publisher add-in.

Installation for the BEXEL Manager platform is available within the [BEXEL User Area](#), within the Add-ins folder. After downloading, unzip the file and run install.bat ***Please close the BEXEL Manager application before running the installation process.

After installation, run BEXEL Manager and open the project to publish data to Portfolio Manager.



Save the project

Please save the project in BEXEL Manager before publishing the data to BEXEL Portfolio Manager



Publishing Data check results

To include Data check results into published data, please run Data Checker before the publishing process to BEXEL Portfolio Manager. The latest version of the Data checker is available in the [BEXEL User Area](#), within the Add-ins folder.

- Clicking on the Publisher button, within the Add-ins ribbon, define the **Project Name** (only required for publishing the initial version of the project. Publisher will automatically recognize the Project Name for all future versions).



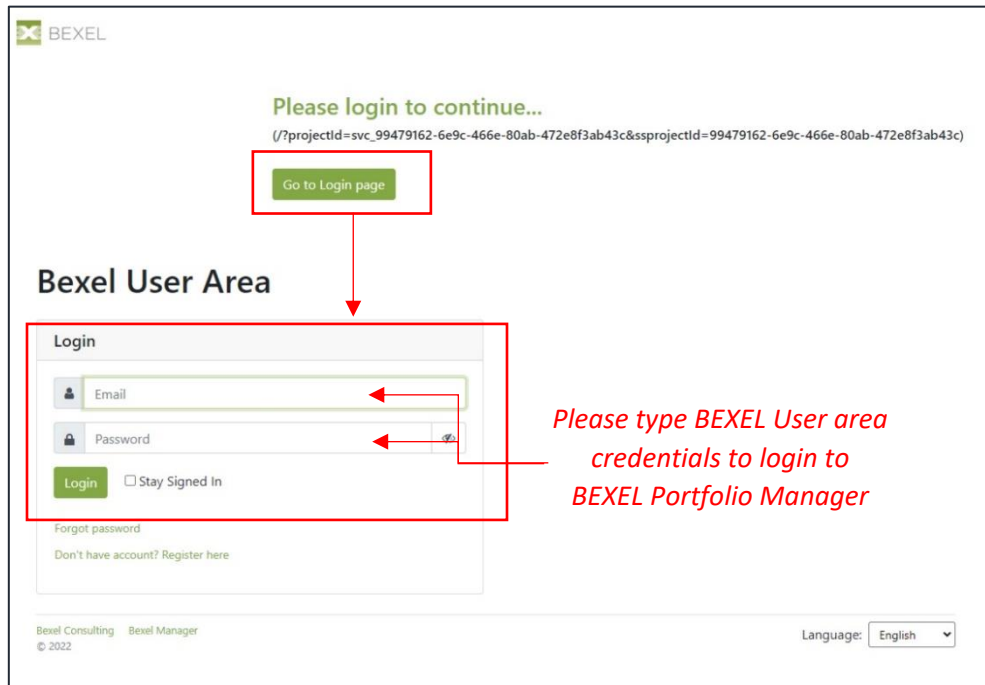
Project Version Name

The **Project Version Name** will be the same as the Project Version Name in the BEXEL Manager. To specify the project version name, save it as the project and rename the version within the BEXEL Manager.

- After the publish is successfully finished, by clicking on the **Yes** button, automatically go to [the BEXEL Portfolio Manager page](#) in the browser with the published project version.

02. Login instructions

Please login to BEXEL Portfolio Manager using credentials for BEXEL User Area.



Picture 01: Login to BEXEL Portfolio Manager

03. BEXEL Portfolio Manager Overview

- Access link opens **Overall projects analysis** page
- Overall projects analysis page provides general cross-project analytics on multi-project and multi-version levels:
 - Within **Select a view** dropdown list, choose desired analysis type within Model explorer, Clash detection, IDS Checks, Cost, Schedule, and Earned Value. *Single project* extension is focused on multi-version dashboards for one project.
- Multi Projects page provides more detailed cross-project analytics on multi-project and multi-version levels:
 - Within the **Projects** dropdown list choose projects and their versions for analysis.
 - Within the **Analytic type** choose the report category available for chosen projects and versions, and within the **Report** dropdown list choose desired report.
- On the left side of the screen is the main menu with **Indicator** and **Display settings (chart type and chart settings)** – chart legend, chart rotation, visibility of report table, etc.)
- **Sorting** and **filtering** projects, versions, and KPI data are available by clicking on the filter icon within the Report table.
- Editing predefined pivot report table is available on option **Show Field Chooser**, on the right-top corner above the report table. Next to this option is the **Export to Excel** button.
- To save the Report chart as a **PNG, PDF, or SVG** file, click on Exporting button in the right-top corner above the Chart.
- **Full-screen mode** is available in the top-right corner of the window

04. Authorization

Because of the sensitive nature of the project data, it is necessary to manage users' access. Within **the *Project Management*** tab, you can configure access rights for each published project, manage versions, and add or remove users and define their roles and permissions. All published data will be visible only to you and the users to whom you gave access rights and who have a BEXEL Portfolio license.