



This guide contains assessment overview pages from three assessors: John Haines (Project manager), Sarah Jones (Programme manager) and Peter Miller (Portfolio manager) who all work for a company called Brooke Bicycles. All three have completed and shared capability maturity assessments on a number of projects, programmes and portfolios.

The assessment overview page is effectively the ‘home page’ for your assessments. Once you have logged in, you can click on ‘assessments overview’ at the top of the screen to access the page.



The screen below is John Haines overview page and shows that he has assessed three projects. At the top of the page are two buttons (marked 1 and 2) that allow you to create a new assessment or invite a colleague to contribute an assessment that will be merged with one of yours.



Assessment	Type	Owner	Available actions	Consolidate	Report
▶ Columbus project	Project	Me	Resume Settings Del		
└ Columbus project	Project (Full)	Peter Miller		ON	
└ Columbus project	Project (Full)	Sarah Jones		ON	
Shackleton project	Project	Me	Resume Settings Del		
Amundsen project	Project	Me	Resume Settings Del		
└ Amundsen project	Project (Full)	Sarah Jones		ON	

Some other features of this page are:

- The Columbus project is highlighted because this was the last one that John was working on. As well as the coloured highlight this project has a triangular arrow ▶ against its name.

Assessment overview page

4. If John wants to resume the assessment he would click here. This may be to update some of the answers based on recent improvements in the management of the project. These would be immediately reflected in the project reports.
5. This button allows John to revisit the parameters he set up when creating his assessment. He could choose to change the topics he wants to assess or perhaps change the context settings to benchmark against different parts of the database.
6. This button allows John to delete this project from his list of assessments.
7. The report icon shows multiple pages because there are multiple assessments for this project.

Assessment	Type	Owner	Available actions	Consolidate	Report
▶ Columbus project	Project	Me	Resume Settings Del		
↳ Columbus project	Project (Full)	Peter Miller		<input type="checkbox"/>	
↳ Columbus project	Project (Full)	Sarah Jones		<input type="checkbox"/>	

John has invited Peter Miller and Sarah Jones to assess the Columbus project. They have shared their assessments with John so that he can produce a report that takes all three people's views into account.

John can choose to switch these component assessments on and off. The report will only reflect his own assessment plus the contributed assessments that are switched 'on'. In the example above, he has switched off both contributing assessments so that the report only reflects his own views of the project.

The Columbus project is part of the Magellan programme and the programme manager, Sarah Jones, assessed the project in her capacity as the project sponsor.

Sarah has set up an assessment for the Magellan programme. She has assessed it herself and invited others to contribute. Her assessment overview page is shown below.

Assessments overview

Create a new assessment Invite a colleague to contribute..

Assessment	Type	Owner	Available actions	Consolidate	Report
▶ Columbus project	Project	Me	Resume Settings Del		
Magellan programme	Programme	Me	Resume Settings Del		
← Columbus project	Project (Full)	John Haines		<input checked="" type="checkbox"/>	
← Shackleton project	Project (Full)	John Haines		<input checked="" type="checkbox"/>	
← Magellan programme	Programme (Full)	Peter Miller		<input checked="" type="checkbox"/>	
Brooke bicycles portfolio	Portfolio	Me	Resume Settings Del		
Amundsen project	Project	Me	Resume Settings Del		

There are four assessments in total for Magellan. Two of these (from Sarah and Peter Miller) assess the management of the programme. The other two are component projects – Columbus and Shackleton. Both were contributed by John Haines.

In the screen above, the report will consolidate the programme management level assessments with the component projects according to the Praxis consolidation principles. If Sarah wants a report based on the management of the programme without the component projects being taken into account, she simply needs to switch off the project assessments as shown below:

Assessments overview

Create a new assessment Invite a colleague to contribute..

Assessment	Type	Owner	Available actions	Consolidate	Report
▶ Columbus project	Project	Me	Resume Settings Del		
Magellan programme	Programme	Me	Resume Settings Del		
← Columbus project	Project (Full)	John Haines		<input type="checkbox"/>	
← Shackleton project	Project (Full)	John Haines		<input type="checkbox"/>	
← Magellan programme	Programme (Full)	Peter Miller		<input checked="" type="checkbox"/>	
Brooke bicycles portfolio	Portfolio	Me	Resume Settings Del		
Amundsen project	Project	Me	Resume Settings Del		

Finally, we come to Peter Miller. Peter owns the Brooke Bicycles portfolio. He has assessed the portfolio himself and also asked Sarah to assess it. He has then invited Sarah and John to contribute the Magellan programme and the Amundsen project respectively.

Peter’s overview page is shown below:

Assessments overview							
Create a new assessment			Invite a colleague to contribute...				
Assessment	Type	Owner	Available actions			Consolidate	Report
Columbus project	Project	Me	Resume	Settings	Del		
Magellan programme	Programme	Me	Resume	Settings	Del		
▶ Brooke bicycles portfolio	Portfolio	Me	Resume	Settings	Del		
← Brooke bicycles portfolio	Portfolio (Full)	Sarah Jones				<input checked="" type="checkbox"/>	
← Amundsen project	Project (Full)	John Haines				<input checked="" type="checkbox"/>	
← Magellan programme	Programme (Full)	Sarah Jones				<input checked="" type="checkbox"/>	

He can choose to include or exclude assessments in exactly the same way as before.



When Peter includes the Magellan programme in his portfolio report he is also including Magellan’s component projects.

The Praxis approach allows you to perform a full 360° assessment of any project, programme or portfolio. There is no limit on the number of assessments you can include and combine, and you can use the on/off buttons to analyse views of managers, sponsors, team members and stakeholders.