



opentext  
Project and  
Portfolio  
Management



# opentext Project and Portfolio Management User Guide

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**opentext Project and Portfolio Management**



## Product Usage Instructions

### **Demand Management:**

Consolidate and prioritize business demands effectively:

1. Gather visibility into ideas and demands using the centralized system.
2. Understand the demand on your organization by type to allocate resources efficiently.
3. Automate IT portfolio management and other business processes with the workflow process engine.
4. Consolidate, prioritize, and fulfill all requests, focusing on high-priority items for efficient delivery.

### **Project Management:**

Achieve real-time project visibility through collaborative project management:

1. Integrate project management and process control for seamless operations.
2. Enable staff collaboration on projects for improved efficiency.
3. Access real-time status updates on projects and investments.

## Frequently Asked Questions (FAQ):

- **Q: What are the key challenges addressed by OpenText Project and Portfolio Management?**

A: OpenText PPM helps in defining business objectives, ensuring consistent processes, planning and executing projects, managing resources effectively, allocating budgets, and tracking project costs.

- **Q: How does Demand Management work in OpenText Project and Portfolio Management?**

A: Demand Management in OpenText PPM provides visibility into business demands, automates processes through a workflow engine, prioritizes requests, and focuses on high-priority tasks for efficient delivery.

## Deliver higher value to your business

OpenText™ Project and Portfolio Management (PPM) helps organizations to track business demands and ideas, make better decisions to invest on the right portfolio of projects that are aligned with strategic priorities, and

collectively manage projects making sure they are delivered on time and within budget.

**However, as businesses grow and technology changes, you may be facing the following challenges:**

- Lack of visibility and control over the demands on your business
- Difficulty in allocating resources and budget to both strategic and operational activities
- Poor alignment with strategic business objectives
- Difficulty in meeting service levels
- Inability to measure, manage, and report on all the demands placed on each department within your organization
- Inability to provide accurate status on requests that have been made
- Any one of these challenges can result in delayed projects, bad business decisions, budget overruns, and frustrated stakeholders. Taken altogether, they can mean the difference between success and failure.
- Define business objectives in accordance with customer values, decide what to invest in.

- CIO/Portfolio Manager



- Ensure consistent processes across projects.

- PMO/Program Manager



- Plan, execute, and complete projects, and address issues, risks, and changes as they come up.

- Project Managers



- Get an accurate idea of resource availability and capacity and resources for projects. Assign resources to projects.

- Resource Managers



- Allocate budget to projects, and track forecast and actual costs of projects.

- Financial Managers



- Submit requests and report time on assigned tasks.

- Team members



Figure 1. Different people in your organization will use OpenText Project and Portfolio Management to achieve common goals.

You need to be able to look at your enterprise from the top-down or the bottom-up, and while different stakeholders, teams, and users will have different needs, that doesn't mean they have to work in different tools. OpenText Project and Portfolio Management combines consistent, controlled processes with the projects, programs, and portfolio data that's needed for organizational governance.

That's why the solution is built on core feature groups called modules that interact with each other to form a

comprehensive project and portfolio management tool for everything that's happening in your enterprise—from developing new software for customers to internal change management—each department, team, and process can use OpenText Project and Portfolio Management to achieve alignment with business strategy. In this paper, we'll cover the most important core modules in the solution, Demand Management, Project Management, Program Management, Portfolio Management, Financial Management, and Resource and Team Management.

## **Demand Management**

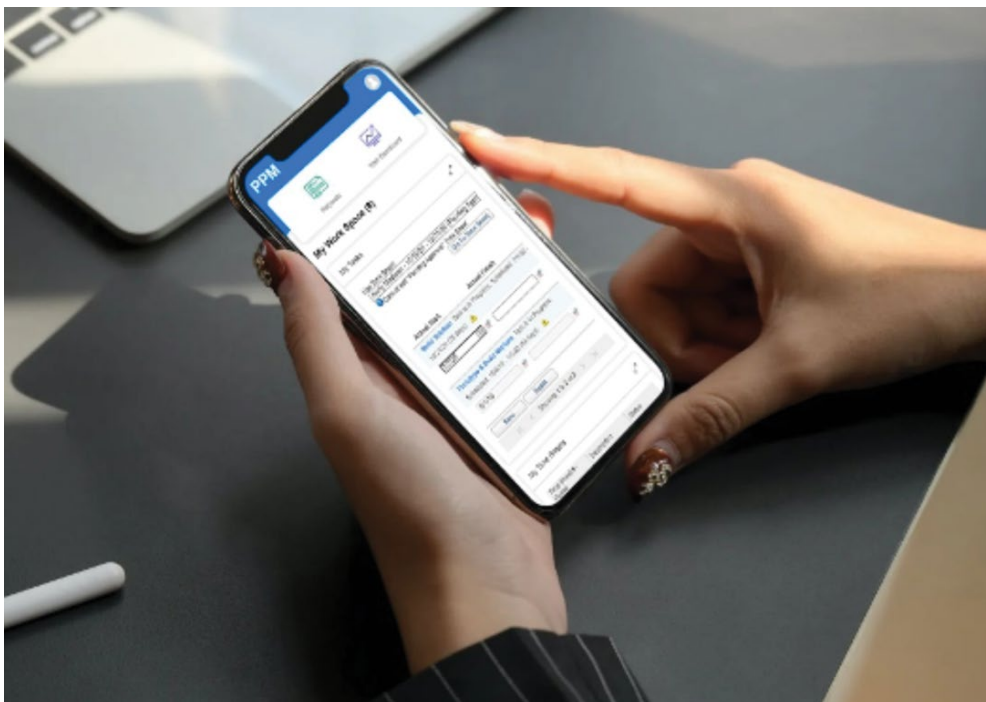
### **Consolidate and effectively prioritize your business demands**

Gain visibility into ideas and demands with a centralized system. See the demand placed on your organization by type, giving you an understanding of what kind of work is being asked of your skilled resources.

### **Address the most important IT demands**

In today's environment of growing demand and tight resources, it is difficult to track new work and be fully responsive to all new ideas and requests. How can you know whether your organization is working on the highest business priorities? How many systems do you use to collect, track, and resolve ideas and demand? How much visibility do you have into what everyone is working on? If you can't easily answer these questions, it may be because numerous "back-door" requests consume staff time without delivering appropriate business value, and often, no automated process exists to evaluate, prioritize, and resolve demand.

Demand Management in OpenText Project and Portfolio Management leverages a powerful workflow process engine that helps automate IT portfolio management and other business processes. This lets you consolidate, prioritize, and fulfill all requests, including strategic projects and operational activities. With better visibility and control, you can focus on the highest-priority requests and deliver on your commitments.



**Figure 2. Use OpenText Project and Portfolio Management for Mobile to review and complete requests.**

### **How Demand Management works**

End users complete a configurable and dynamic request form using a standard web browser. Each request type has an associated workflow, which specifies the process for reviewing, evaluating, prioritizing, scheduling, and approving the request. Based on the project and portfolio management workflow, the reviewer can assign the request to a person or team for scheduling and delivery. Notifications defined as part of the process can be activated at any step to indicate work that needs to be done, has not been done, or is being escalated, or for any other reason. A web-based dashboard delivers the real-time information as needed. Using a browser, managers can assign tasks, and staff can view and work on tasks assigned to them, while end users can check the status of

submitted requests.

## **Demand Management at a glance**

- **Shared demand repository:** Consolidates and stores all ideas and demands in a central repository for better reporting, visibility, and control.
- **Unlimited demand categories:** Lets you configure demand categories, such as business initiatives, business units, departments, applications, groups, and assignments to users and others to meet your organization's needs for reporting, scheduling, and more detailed management. You can store documents with demand requests, using built-in document management.
- **Demand scheduling and prioritization:** Lets you schedule requests by priority, date, contribution, or other metrics. You can adjust priorities to reflect current or expected business needs.
- **Drag-and-drop process modeling:** Allows you to adjust processes and create new processes in minutes to meet your specific business needs.
- **Complete audit trail:** Captures every change to every request for a complete, detailed audit trail.

## **Project Management**

Achieve real-time project visibility with collaborative project management This robust solution integrates project management and process control, allows your staff to collaborate on project management, and provides real-time visibility into project and investment status.

### **Accelerate project delivery**

Successful projects can make or break an organization. A recent study by the Project Management Institute (PMI) found that projects are two times more successful when proven project management practices are used.<sup>1</sup> OpenText Project and Portfolio Management provides you with the structure to use these proven project management practices and increase your project success rate. Unlike traditional project management software that only plans, schedules, and reports on project status, OpenText Project and Portfolio Management offers your project managers robust resource management functions, a task-level workflow to augment the work breakdown structure, and the ability to leverage best practice processes to accelerate project delivery.

The solution gives team members and stakeholders a platform for project collaboration and provides real-time visibility into resources, processes, status, and interproject dependencies. The software includes out-of-the-box project management tools and processes that help you effectively initiate projects; plan and track phases, milestones, and tasks; schedule and assign resources; and conduct high-level planning. Project status, milestones, and cost summaries are available from an included dashboard to keep your stakeholders informed and your projects on track, as shown in Figure 3 on the following page. 1 PMI, Pulse of the Profession 2019



**Figure 3. Track all your projects and record progress in one place.**

As tasks are assigned to resources, they automatically appear on each user's dashboard. As users update their status, information is automatically rolled up through the project hierarchy so that project managers and stakeholders see current project status in real time, anytime. Project Management also facilitates managing by exception. Color indicators identify project health by cost and schedule so you can easily identify problems. The Project Overview page becomes the "one-stop shop" for managing and assessing the health of the project, with details just a click away.

### **Project Management at a glance**

- Real-time monitoring and control: The solution provides real-time project visibility into your project resources, processes, status, and dependencies to improve communication, productivity, and speed of decision-making.
- Integrated projects and processes: In addition to standard baseline, milestone, critical-path, and project-template capabilities, the solution includes project methodologies to drive project execution, so participants are engaged at the appropriate time with the appropriate information. You can use out-of-the-box processes or create personalized ones to meet your specific needs.
- Direct integration to financial and resource management: Because this module is part of the OpenText Project and Portfolio Management solution, project management integrates to other key modules directly, such as financial management, resource management, and time management—allowing you to comprehensively manage your projects.
- Project collaboration: It supports inter-project dependencies to keep external tasks and projects from pushing deadlines without informing stakeholders of the changes because project status is continually updated in real time.

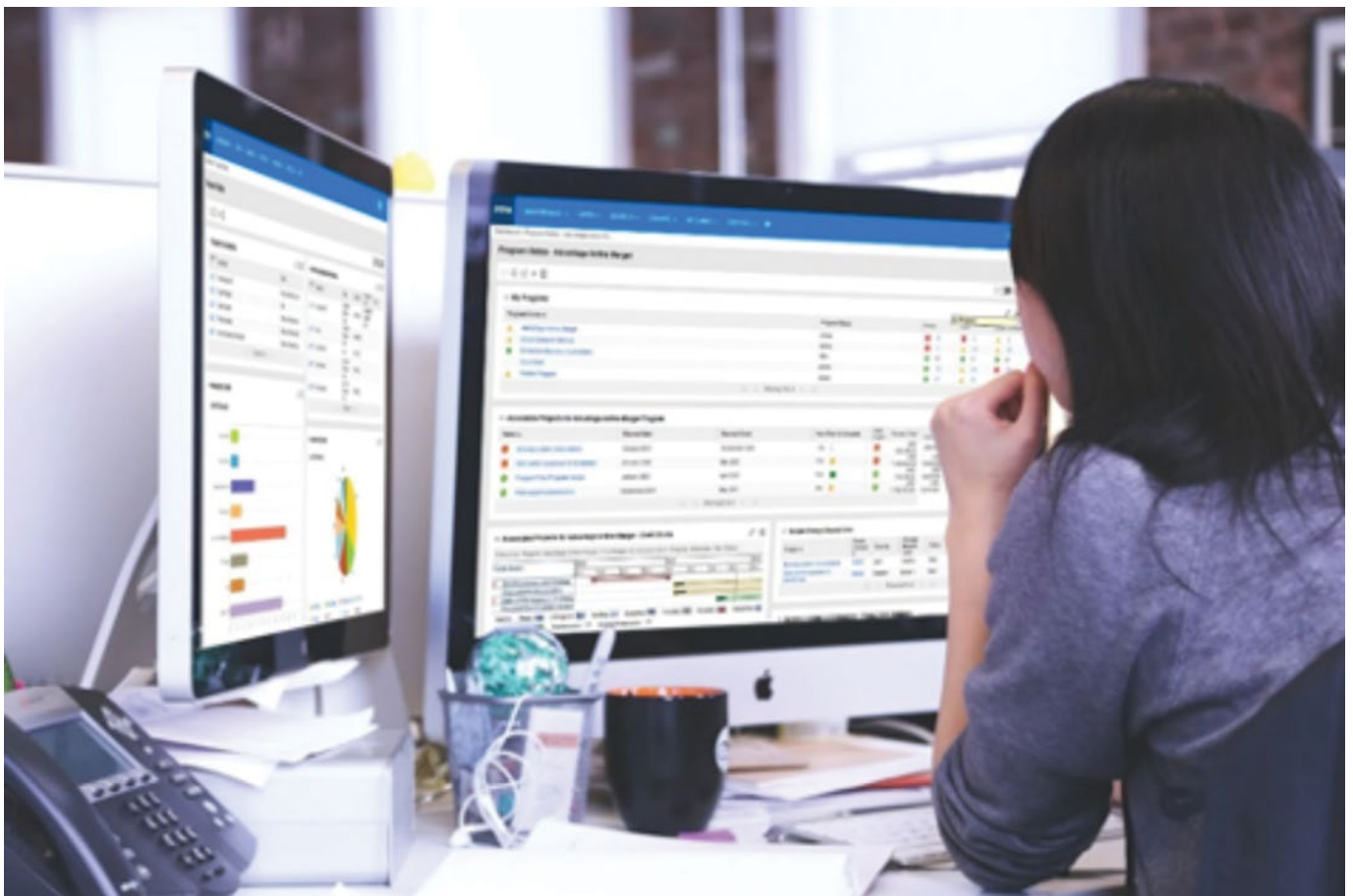
### **Program Management Govern the program lifecycle**

- OpenText Project and Portfolio Management provides simple, easy to understand status of program execution with in-depth details just a single click away.
- The Program Management module lets you collaboratively manage your programs from concept to completion. It automates processes for managing scope, risk, quality, issues, and schedules.

### **Optimize the value of your Program Management Office (PMO)**

Delivering complex programs on time and on budget is a major challenge for any organization. Having complex but interrelated projects make it so a program manager is virtually guaranteed to face resource and process issues. Organizations need to know which programs are in trouble at any given time and how to get those programs back on track.

The Program Management module is an excellent way to optimize the value your PMO delivers to your business while reducing risk. From large programs to individual projects and tasks across your portfolio, Program Management improves your PMO governance and execution.



**Figure 4. Best-practice PMO processes let you model and enforce corporate PMO standards while keeping your stakeholders and team members aligned at every step.**

At a glance, program managers as well as business sponsors, program directors, project managers and other interested individuals can see how every program member project is executing across multiple critical success factors. Status reports are a way of life for project and program managers. Compiling the data for these reports can be tedious and time consuming. The solution automates this data collection process and frees up time for more meaningful activity. Project and program participants and stakeholders each have individualized dashboards that provide real time information covering issues, risks, scope change and financial information. When additional data is needed a simple, single mouse click exposes needed details. This easy access to data lets you act directly on the information reducing the time associated with approvals, status updates and priority changes. Projects that comprise a program will have interdependencies. Program Management helps you track these interdependencies by linking tasks or even entire projects that affect another particular project or task. A powerful scheduling engine automatically takes these dependencies into account to keep project views up to date, letting you make appropriate tradeoffs, using real-time information across projects in the program.

## **Program Management at a glance**

- Automate complex PMO processes: Provide for and enforce processes for managing programs, scope changes, risks, issues, schedules, resources, releases and costs.
- Out-of-the-box best-practice processes: Offer best-practice processes right out of the box so you can implement them quickly. You can also adapt and extend these processes using a simple drag-and-drop interface.
- Visibility and controls across projects: Provide real-time information that lets your project managers monitor complex, multi project programs and drill into current project details at any time.
- Collaboration and stakeholder alignment: Provide visibility into critical success factors across programs, projects and operational type activities. Stage gate program and project lifecycles enable collaborative decisions on what takes priority.
- Provide the structure and processes for managing scope changes, risk, quality, issues, schedules, resources, releases and costs: You select which features to use out of the box, without losing the ability to adapt and extend these processes as your business changes.
- Add and change processes with the drag-and-drop process modeler of Project and Portfolio Management: Includes an out-of-the-box program initiation process to get you started. Build forms to specify what data is required, requisite approval steps, and established program dashboards for visibility and real-time status. The process then verifies that required data is collected and that approvals and change requests are appropriately handled.
- Establish program financials, schedules and resources as part of the initiation process: Projects and project plans can be tied to a program for detailed work breakdown structures, tasks, resource management or summary milestone reporting.

## **Portfolio Management**

- Make smart portfolio investment decisions
- Portfolio Management in OpenText Project and Portfolio Management provides the real-time governance process you need for effective portfolio management to reduce costs and increase efficiency.

## **Reduce costs and increase efficiency through effective portfolio management decisions**

- Competition for resources is fiercer than ever today in most companies— probably including yours. How can organizations prioritize the needs of different business units and other internal customers? How can they make tough decisions about what to take on? And how do they share those decisions with their business leaders? From the day-to-day maintenance work to the new initiatives that grow and transform your business, this module lets business stakeholders collaboratively govern the entire corporate portfolio with objective prioritizations and multiple levels of input, review, and approval.
- With the Portfolio Management module, you can align corporate investments to business strategy. As projects are proposed and resource requirements are identified within the portfolio, your business executives can prioritize their work and provide stakeholders with better estimates of when the work will be completed. The Portfolio Management module supports hierarchical portfolios that give executives and managers the flexibility to set up and review the corporate portfolio to reflect their organizational and reporting requirements.
- Additionally, you can add backlog items to your portfolio and view those portfolio items in a drag-and-drop

Kanban board or in a timeline roadmap view.

- Real-time budgetary information and program, and project-health status indicators offer timely visibility into actual status against the forecasted plan. You can drill into these details to review specific details at the portfolio, sub-portfolio, program, project, or asset level.



**Figure 5. Real-time views: The Portfolio Management dashboard displays portfolio management information, giving your IT and business leaders realtime views of portfolio performance to support dynamic decision-making.**

### **Model the ideal mix**

Determining the ideal mix of proposed projects, active projects, and operational work to fund in any particular year is difficult. The Portfolio Management module lets you define unlimited what-if scenarios, creating the ideal mix of projects, proposals, and other work. You can model changes to dates, budgets, or resources to meet your goals, whether they are strategic alignment, return on investment, net present value, benefit realization, capacity, skill availability, or a combination of these or other factors.

You can also see the impact of accelerating an important initiative or retiring a low-value asset. The powerful optimization engine churns through every combination of portfolio management options to recommend the ideal mix. You can further define the optimization criteria by defining targets for spending against business objectives, project class, or asset class. You can flag regulatory or compliance projects so that they are included, regardless of their contribution to the overall portfolio value. You can also identify project dependencies to determine whether the ideal mix is achievable. Once the information is optimized, you can modify the portfolio further before accepting the recommendation. Visualizations highlight any discrepancies between an optimal portfolio and the current portfolio.

### **Portfolio Management at a glance**

- The Portfolio Management module provides: The processes, entities, and analysis to manage your corporate

portfolio.

- Govern processes and provide consistency across your enterprise: Automated processes enforce required information so that it is available and consistent across pending or proposed projects, active projects, and applications in production.
- Collect real-time information: Include quantitative data (such as financial budgets and forecasts, resources, and schedules), along with qualitative information (such as strategic fit, alignment, and complexity) for apples-to-apples comparisons across the portfolio.
- Hierarchical portfolios give you flexibility: Provide business units with information that map to their unique requirements. Portfolio Management hierarchies provide flexibility to view the corporate portfolio in multiple ways to meet unique reporting requirements.
- Reduce manual data entry in standalone reporting tools: Your executives can see the portfolio's real-time status and get immediate access to detailed information to support their decision-making.
- Portfolio Management optimization capabilities: The system automatically suggests the ideal mix of proposed projects and other work based on user-defined or constraint-based criteria.

## **Financial Management**

### **Detailed financial management from end to end**

Financial Management manages your company's portfolio with real-time visibility into financial performance, from budgeting through the collection of actual costs.

### **Track investments and gain benefits**

Few organizations operate with "blank checks" these days. Limited budgets require tough decisions on what organizations commit to: Focused projects that increase business value, optimized service delivery, and reduced costs. To make the best decisions, managers need real-time visibility into budgets and actual costs. But that's not enough for success. They also need simultaneous visibility into the project, program or portfolio progress, status, and value being realized from these investments. In other words, for both projects that keep the business running and initiatives that grow and transform the business. The Financial Management module provides all of this.

The Financial Management module helps manage your company's portfolio of proposals, projects, applications, and operational activities with real-time visibility into financial performance. It gives you the information and processes required for making effective portfolio management decisions, from top-down planning of project and program budgets—that includes forecasted costs—through to the capture of actual costs as work is performed.



**Figure 6. Track planned and actual costs across multiple projects, programs, and portfolios.**

One of the keys to governing financial controls effectively across your portfolio is ready access to the budgeted plan of record and actual/forecasted costs. Financial trending and comparisons are available with OpenText Project and Portfolio Management software point-in-time snapshots of the financial summary information. This gives you the requisite real-time visibility needed to analyze approved spend and forecasted costs, and quickly determine if a whole portfolio or programs and projects are at risk of going over budget.

### How the Financial Management module works

The Financial Management module provides real-time visibility into plan of record budgets, forecasted and actual costs (both labor/non-labor and capital expense/operating expense), programs, projects, risks, and overall demand—without costly integrations to multiple data sources. Costs can be managed in any currency. Budgets are created for labor costs and non-labor charges as well as capital and operational expenditures. Financial snapshots are available to track and report on changes throughout the lifecycle of the investment. Dashboards elevate visibility into projects with capital expenditures, clearly identifying risk and exposure. Actual labor hours from time sheets, project entries, or staffing profiles combine with defined resource rates by skill set, individual, or other rules to calculate actual labor costs, using flexible cost rates by resource, project, type of work, date range, and more.

The Financial Management module not only provides detailed views of project health, it also helps you establish and manage the budgeting lifecycle—from project proposal, justification, and review to project initiation, execution, deployment, benefits realization, and maintenance. Costs are calculated automatically where possible and otherwise entered manually through an intuitive interface to take advantage of existing financial system investments.

### Financial Management at a glance

- Visibility and financial governance controls provide a real-time investment summary that presents accurate, financial details throughout the portfolio lifecycle, enabling your organization to align IT initiatives with business goals, manage costs by exception, and improve the accuracy of forecasts.
- Strategic and operational activities become the touchstone for monitoring cost performance of all business

operations. Business stakeholders see in real time the value that the Project Management Office (PMO) delivers.

- SOP 98-1 support uses a built-in capitalization method to reduce capitalization errors and uses built-in portlets to bring needed visibility and control.
- Earned value analysis automatically tracks and calculates earned value, including both labor and non-labor metrics. Because this analysis is performed automatically for you, your organization can begin managing by earned value without the time and expense traditionally required to capture and calculate necessary values.
- Breadth of financial coverage establishes and manages budgets (with both capital and expense items), expected and realized benefits, risks and risk probabilities, forecasted actual cost calculations, actual plus forecast-to-budget comparisons, and visual monitors of financial performance to enable real-time analysis of cost of service and defensible chargebacks.
- Real-time, 24x7 information is offered through the OpenText Project and Portfolio Management dashboard.

## **Resource and Team Management**

### **Gain complete visibility and control over resource supply and demand**

Effectively measure resource capacity and efficiency, both from top-down planning through bottom-up execution. Resource and Team Management balance your resource supply, giving you full visibility and control over resource utilization.

### **Traditional, Agile, or hybrid resource management**

Get real-time visibility and control over your resources. Skilled workers are more important than ever to the success of your business. Putting the right people on the right projects is often the difference between meeting the needs of the business and falling short. Plus, tight budgets punish resourcing mistakes that delay important investment projects and reduce worker productivity. As the Agile methodology spreads, it's also important to be able to have the flexibility to manage traditional, hybrid, and agile projects in the same place.

The OpenText Project and Portfolio Management Resource Management module responds to these challenges. It helps you answer key questions, such as:

- Is too much of my capacity consumed by ad hoc projects vs. strategic projects or routine operational activities?
- Am I effectively using my most valuable resources?
- When will I have suitably skilled resources to start that strategic project?
- Do I need to look externally for a short while to fill important resourcing needs?

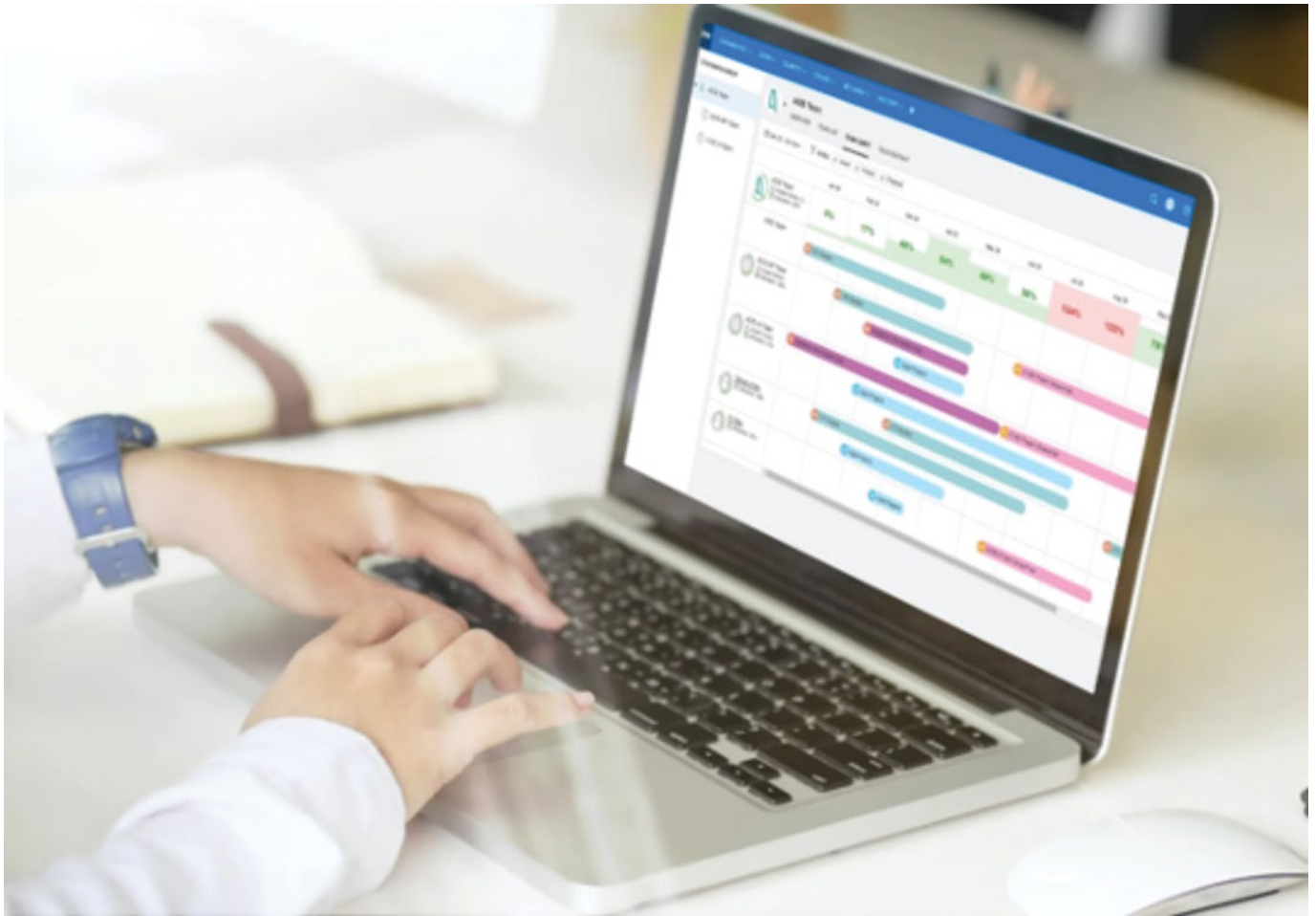
The Resource Management module provides a holistic and real-time picture of resource supply, including resource roles, skills, and skill levels, across the entire organization. It also captures demands for those resources from projects and operational activities that drive your business in real time, providing up-to-date visibility into what resources and skills are required and when. To fulfill demand, you can allocate resources by name, position, role, or group, and then track resource allocations against any work item. And, it supports any development method that is used: whether Agile or Waterfall.

### **Plan and schedule resources from the top-down or bottom-up**

The Resource Management module makes it easy to plan and schedule your resources. Staffing profiles capture high-level resource requirements from a position or role perspective, allowing you to forecast demand at a high level before schedule or assignment details are known. Resource pools are used to model resource supply by company, division, group, or program. For example, using both staffing profiles and resource pools, you can easily identify the need for more Java developers, marketing resources, or database administrators before you worry about whom to assign to a project six or 12 months in the future—improving overall planning and decision-making.

Staffing profiles also help you to evaluate new project requests quickly (and adjust their scope) without spending

weeks on detailed project planning. And once projects or activities are approved, you can build detailed assignments that specify the exact resources and dates for a set of tasks or activities and search for the most suitable resource based on different criteria. The transition from top-down planning to bottom-up scheduling is seamless. Similarly, in Agile environments, resources can be assigned to teams that are assembled to complete the projects together. Agile team leaders then assign resources in stand-up meetings, within the system, or however they normally make assignments. Then Agile team members can input time spent on activities to provide accurate financial reports and milestone updates to executive management.



**Figure 7. Quickly assess your team's assignments and workload with the Team Management Dashboard.**

### **Resource Management at a glance**

Individual resources with roles, skills, proficiencies, work calendars, rates, and productivity metrics are entered into the system or maintained through LDAP. Resource pools, including Agile teams, reflecting groups of resource supply are created to meet demand from staffing profiles, project plans, and operational activities. Easy-to-use resource pool search capabilities make it easy for you to quickly identify and staff the right resources, in traditional or Agile working environments. Automatic real-time updates and an enforced process help you keep resource allocations and utilizations up to date for effective high-level resource budgeting and detailed project planning, execution, deployment, and benefits realization. And unlike other systems, the Resource Management module provides real-time visibility into capacity, assignments, utilization, programs, projects, costs, and overall IT demand in traditional and Agile environments—without the need for costly integrations to multiple data sources. Resource Management gives you the power to increase the value your resources deliver to the business.

### **Resource and Team Management at a glance**

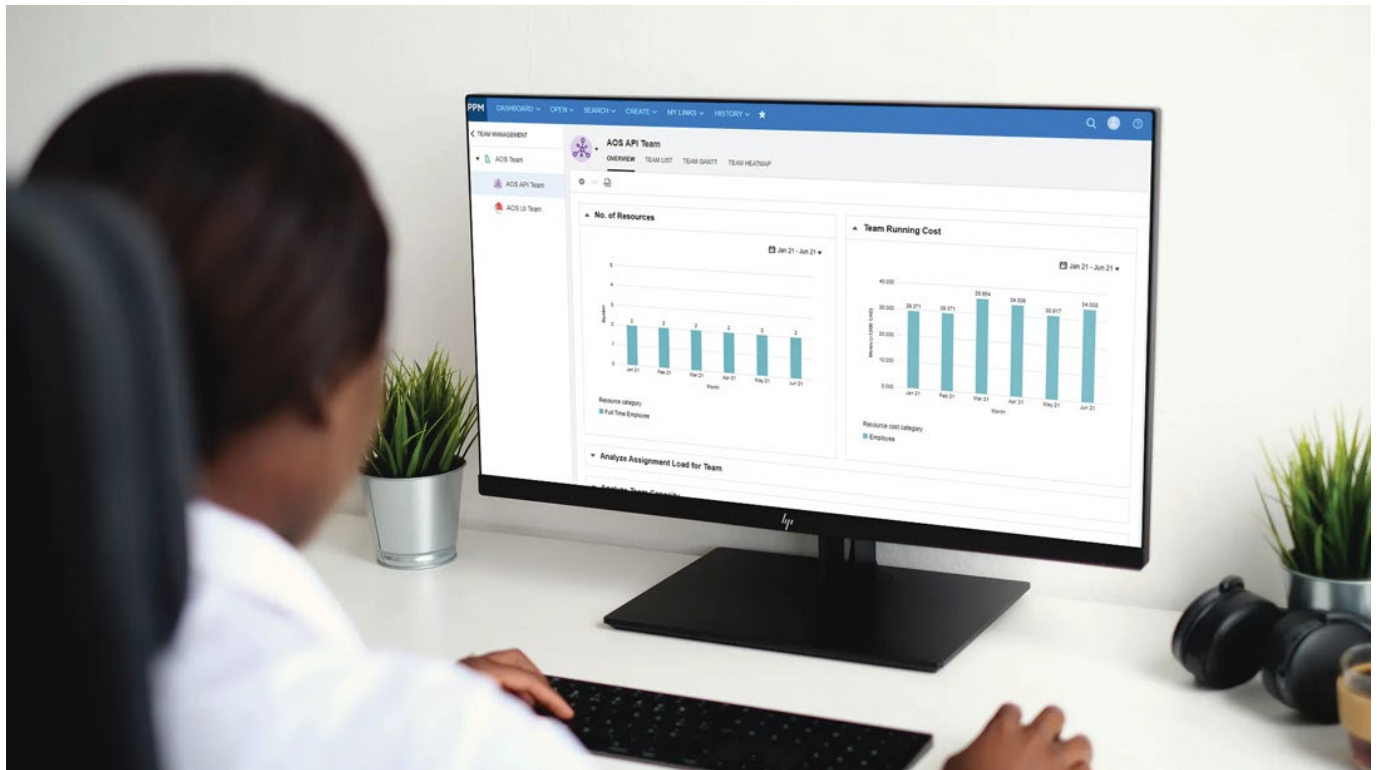
- Top-down and bottom-up support: Forecasts resource demand by roles for portfolio planning, then transitions through resource requests to detailed task and request assignments.
- Resource visibility: Provides supply and demand visibility into resources and resource roles and skill levels across the organization.

- **Agile Team Management:** Allows you the flexibility to create and manage Agile work teams and capture output in terms of milestones or detailed work assignments.
- **Resource search:** Along with resource attributes, helps you find the most suitable resource to assign to a specific project, task or operational activity service request.
- **Optimized resource effectiveness:** Provides the visibility and processes to allocate resources to the highest-priority activities across groups.
- **Real-time transactions:** Captures the transactions that drive IT in real time, so resource utilization and status are up to date.

## OpenText Project and Portfolio Management

### A complete solution

Choose the delivery option that is best for you OpenText Project and Portfolio Management is offered as a Software as a Service (SaaS) or an in-house project and portfolio management solution. You benefit from the flexibility to jump-start your implementation using our SaaS solution and migrate in-house when and if you choose to. Plus, OpenText best practices are provided whether you opt for our SaaS solution for faster time-to-value and lower total cost of ownership (TCO) or for an in-house implementation backed by an expert team of consultants.



**Figure 8.** The Team Overview page lets you track team-level metrics with powerful data portals.

### Integrate with existing tools

You can integrate the solution with your existing enterprise tools through web services or our ready-to-use integrations with solutions such as OpenText™ Application Quality Management, OpenText™ Software Delivery Management, and others.

### OpenText Project and Portfolio Management at a glance

- **Robust data insight:** Focus on what matters. From top-down or bottom-up analytics, the solution provides hundreds of portlets with robust data to align corporate investments with business strategy.

- Value-driven portfolio: Create portfolios that add faster value to your business. Monitor with smart KPIs and take advantage of what-if scenarios to determine the right mix of deliverables versus investments.
- Enterprise Agile ready: Manage hybrid projects (legacy or Agile). The solution integrates out-of-the-box with the most popular Agile tools including OpenText Software Delivery Management, CA Rally, Jira, VersionOne and others.

## Comprehensive training

OpenText provides a comprehensive curriculum of Software and Project and Portfolio Management courses to provide the training you need to realize the full potential of your solutions, increase your network optimization and responsiveness, and achieve better return on your investments. With more than 30 years of experience in meeting complex education challenges worldwide, OpenText knows training. This experience, coupled with unique insights into Software products, positions us to deliver the optimum training experience. For more information about these and other educational courses, visit: [opentext.com/services](https://opentext.com/services).

## OpenText Services


### Get the most from your software investment

OpenText provides high-quality software services that address all aspects of your software application lifecycle needs. With OpenText, you have access to standards-based, modular, multi-platform software coupled with global services and support. The wide range of service offerings—from online self-solve support to proactive mission-critical services—enables you to choose the services that best match your business needs.

- For an overview of OpenText software services, visit [opentext.com/services/success-services](https://opentext.com/services/success-services).
- Learn more at [opentext.com/products/project-and-portfolio-management](https://opentext.com/products/project-and-portfolio-management) [opentext.com](https://opentext.com).

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## Documents / Resources

	<p><a href="#">opentext Project and Portfolio Management</a> [pdf] User Guide 262-000154-001, Project and Portfolio Management, Portfolio Management, Management</p>
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## References

- [User Manual](#)

[Manuals+](#), [Privacy Policy](#)

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