

Stakeholders

A stakeholder is an actor which takes part to a project. There are 2 kinds of stakeholders:

- The ones directly associated to an Initiative/Release (called direct Stakeholders)
- The ones related to the Portfolios of an Initiative/Release

Both kinds benefit the same capabilities (rights) on the Initiative/Release.

This sections focuses on the direct Stakeholders. The Stakeholders of the Portfolios are explained in the [Portfolio](#) page.

Attributes

A Stakeholder has the following set of attributes:

Field	Description
Full name	The actor which represents the Stakeholder
Role	The specific role of the actor for the Initiative/Release. The available roles depend of the Initiative/Release type.

Identity card

→ The [Initiative/Release's "view basic data" permission](#) is needed to display the Stakeholders' identity card.

The Stakeholders' identity cart is represented by:

- The list of direct Stakeholders with management capabilities (add, edit and delete)
- The list of Stakeholders of the Portfolios

The screenshot shows the 'Stakeholders' page in a CRM system. The left sidebar contains navigation items: Overview, Details, Financials, Stakeholders (highlighted), Governance, Delivery, Planning, Status reporting, and Integration. The main content area is titled 'CRM upgrades / Stakeholders' and shows 'Manager: Steven All'. There are two tables:

Stakeholders		
Name	Role	
Gustav Archi	Architect	edit delete
James Dev	Developer	edit delete
Bill Finance	Product manager	edit delete

Stakeholders of the portfolios		
Name	Role	Portfolio
Steven All	Product manager	Marketing Portfolio
Gustav Archi	Architect	Marketing Portfolio
Bill Finance	Product manager	Transformation Program
Suzan Pmo	Business analyst	Transformation Program

Stakeholder management

→ The [Initiative/Release's update permission](#) is needed to manage a stakeholder.

Add a Stakeholder

1. Go to the [Stakeholders identity card](#),
2. Click on the “Add” icon  inside the Stakeholders table,
3. Complete the Stakeholder's attributes and Save,
4. The new Stakeholder has been added.

It's not possible to add twice the same actor for the same role.

The available roles depend of the Initiative/Release type.

Edit a Stakeholder

Edit a Budget Line

1. Go to the [Stakeholders identity card](#),
2. Click on the “Edit” icon  for the wished Stakeholder,
3. Modify the Stakeholder's attributes and Save,
4. The Stakeholder has been updated.

Delete a Stakeholder

1. Go to the [Stakeholders identity card](#),
2. Click on the “Delete” icon  for the wished Stakeholder,
3. Confirm that you want to delete the Stakeholder. **A Stakeholder can not be restored once deleted. If you delete one by error, you will have to re-create it.**
4. The Stakeholder is deleted.

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