

Overview

This Job Aid defines the steps to follow for collaborating on portfolio and program support items, such as issues, risks, decisions, changes, constraints, assumptions, lessons learned, and documents, in Sensei IQ.

Based on organizational policies and your specific requirements, you may not use all these support items on your portfolio or program.

There are eight (8) collaboration components available to help you deliver your portfolios and programs, and each is addressed here.

- 1. Managing issues
- 2. Managing risks
- 3. Tracking decisions
- 4. Recording and managing change requests
- 5. Documenting constraints
- 6. Capturing assumptions
- 7. Capturing lessons learned
- 8. Managing documents

With the exception of managing project documents, the components function similarly and if you are comfortable with one, you may not need to review the other components of this document.

Managing issues

Program Manager

Portfolio IQ – Issues tab

1. CREATE NEW ISSUE

- a. Ensure you have the appropriate program open in **Portfolio IQ.**
- b. Click the **Issues** tab.

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Leadership 釽 Insights ም Portfolios		Program Name Cassowary Product Development		Business Case Overview	This program will provide for a mobile support app, the introduction of three new product lines to confine meeting the name of our	
Lui Programs Intake 釽 Insights	A	Description This program includes projects associated with the Cassowary line of Products.		Options	Customers, and reduce our raw material Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	10%

c. Click +New Issue.

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~	Name \vee	Assigned To \checkmark	Status Reason \vee	Priority \checkmark	Category \checkmark	Due D ↑
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	Account number format may have to change	Resource Constraint	Active	↑ High	Schedule	🔶 18-Au
	Environmental regulations recently changed, a	an Bob Banker	Active	1 High	Scope	30-Au

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Job Aid | Collaborating on portfolio and program support items

- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the issue in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.

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		Category		
		Priority	Medium	
E		Due Date		1
		Description		
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		Resolution		
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2. UPDATE ISSUES

- a. Ensure you have the appropriate program open in **Portfolio IQ.**
- b. Click the **Issues** tab.

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	Leadership			Program			Business Case	Program Status		
	渝 Insights			Name	* Cassowary Product Development		Overview	This program will provide for a mobile support		
Г	Portfolios		A	Description	This program includes projects associated with the Cassowary line of Products.			lines to continue meeting the needs of our customers, and reduce our raw material		
	Intake			,			Options	Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	10%	

c. Click on the **Issue** to be updated from the list.

Cassowary Product Development Program												2020 IT Portfolio Portfolio	Fred Sa Sponsor	mple	Active _{Status} ~
Details Strategic Goals Key Dates Pro	ojects	Status Updates	Stakeholders	Issues	Risks	Decisions	Changes	Constraints	Assumptions	Lessons Benefits	Documents			ጎድ 1 Gr	oup Member
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- d. Update any field, as required.
- e. Click Save & Close.

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Job Aid | Collaborating on portfolio and program support items

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	Ac Issu	count number forr	nat may have to change dur to privacy issues			Cassowary Product Development Customer Account Inquiry Upgrade Program Project
	De	tails				
		Name *	Account number format may have to change dur to privacy issues		Description	The account number currently has 4 characters of the customer's last name, privacy concerns suggest the account number should have no identifying information
		Assigned To	A Nate Auchter			Update - NA - Dec 5, the privacy officer will confirm, but they beleive this is not enough to cause
D		Status	Active			privacy concerns as no one can be uniquely identified by 4 characters of a last name.
		Category	Schedule		Resolution	
		Priority	High Medium Low			
		Due Date	18-Aug-20	Ē		

Managing risks

Portfolio/Program Manager



1. CREATE NEW RISK

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Risks** tab.

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Leadership 🟦 Insights 📽 Portfolios		Program Name Cassowary Product Development Description This program includes projects associated with the		Business Case Overview	This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our	
luil Programs Intake ណី Insights		Cassowary line of Products.		Options	customers, and reduce our raw material	10%

c. Click +New Risk.

Cassowary Product Development Program				2020 IT Portfolio Fred Sample Active Sponsor Status
Details Strategic Goals Key Dates Projects	Status Updates Stakeholders Issues Risks Decisions	Changes Constraints Assumptions Lessons	Benefits Documents	-
Matrix	Risks for Program	C	+ New Risk	🖱 Refresh 🔍 See associated records
Risk Matrix 🖒	✓ Name ∽	Assigned To \checkmark Status Reason \checkmark	Category ~	Due Date ↑ 🖂
5 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Staffing for the program	Steve Router Active	Resource	 29-Apr-20

- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the risk in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.

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Job Aid | Collaborating on portfolio and program support items

	Quick Create: Risk			×	
D	Name	•			
	Assigned To				
	Status		Active		
	Category				
	Due Date				
	Likelihood	•			
	Consequence	•			
E	Cost				
	Description				
	Mitigation Plan				
	Cor G Plan				
	Trigger Description				
	Trigger		Date		
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2. UPDATE RISKS

- a. Ensure you have the appropriate portfolio or program open in **Portfolio IQ.**
- b. Click the Risks tab.

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Leadership	Program Business Case Program Status	
ഷ്ണ് Insights	Name Cassowary Product Development Overview This program will provide for a mobile support Program Completion	
88° Portfolios	A Description This program includes projects associated with the lines to continue meeting the needs of our customers, and reduce our raw material	
Programs	Cassowary line of Products. Options Outsourcing the development of the mobile app;	10%
Intake	estabilish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	

c. Click on the **Risk** to be updated from the list.

Cassov Program	wary Product Development												2020 IT Portfolio Portfolio	Fred Sample Sponsor	Active Status	\sim
Details	Strategic Goals Key Dates P	ects Status	Updates Stakeho	olders Issues	Risks	Decisions	Changes	Constraints	Assumptions	Lessons	Benefits	Documen	ts			
Matrix	x	Risks 1	or Program								+	New Risk	🖒 Refresh 🖩	8 See associate	d records	
	Risk Matrix	~	Name 🗸				Assigned To	~	Status Reason	~	Catego	ry 🗸	Due Date	t ~		
	5	С	Staffing for the prog	jram			Steve Rou	ter	Active		Resou	irce	29-/	Apr-20		
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	1 2 3 4 5 Likelihood															

- d. Update any field, as required.
- e. Click Save & Close

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S Ri	taffing for the pro	gram			Cassowary Product Development Portfolio Program Project	Benefit
	etails					
	Name	* Staffing for the program		Description	The PMO is experiencing problems finding adequate staff for this project	
	Assigned To	A Steve Router				
	Status	Active		Mitigation Plan	Use sub-contractors	
	Category	Resource				
D	Due Date	29-Apr-20		Contingency Plan	Delay one or more projects within the program until staff are available	
	Likelihood	* Possible				
	Consequence	* Major		Trigger Description	Individual project schedule slippage	
	Cost	\$75,000.00				
				Trigger	Tasks not completed	

Tracking decisions

Portfolio/Program Manager

1. CREATE NEW DECISION

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Decisions** tab.

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Leader	rship		F	rogram			Business Case	Program Status		
疝 In	nsights			Name	* Cassowary Product Development		Overview	This program will provide for a mobile support Program Completion Program Completion		
8°° Po	ortfolios			Description This program includes projects associated with the		lines to continue meeting the needs of our				
Liil Pr	rograms				Cassowary line of Products.		Ontions	customers, and reduce our raw material	100/	
Intake ឈំ In	nsights						Options	establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	10%	

c. Click +New Decision.

Cassowary Product Development Program										2 P	020 IT Portfolio ortfolio	Fred Sample Sponsor	Active Status
Details Strategic Goals Key Dates Pr	rojects	Status Updates Stake	eholders Issues F	Risks Decisi	ons Changes	Constraints	Assumptions	Lessons	Benefits	Documents		*	1 Group Membe
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1		Development ap	proach		Malcom Hamilto	on Activ	e	1 High		24-Apr-	20 Resou	irce	
Overdue decisions													

- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the decision in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.

Portfolio IQ – Decisions tab

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Name	*	
Description		
Status	Active	
Priority	Medium	
Due Date		
Category		
Escalation Required	No	
Escalation Manager		
Decision Date		
Approver		
Assigned To		

2. UPDATE DECISIONS

- a. Ensure you have the appropriate portfolio or program open in **Portfolio IQ.**
- b. Click the **Decisions** tab.

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Leadership		Program		Business Case		Program Status				
ش Insights ۳° Portfolios		Name Cassowary Product Development Description This program includes projects associated with Cassowary line of Products.	the	Overview	This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material	Program Completion				
Intake	1			Options	Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.		10%			

c. Click on the **Decision** to be updated from the list.

Cassov Program	vary Product D	evelopme	ent											:	2020 IT Portfolio Portfolio	Fred Sample Sponsor	Active Status
Details	Strategic Goals	Key Dates	Projects	Status Updates	Stakeholders	Issues I	Risks	Decisions	Changes	Constraints	Assumptions	Lessons	Benefits	Documents		5 2	1 Group Membe
Decisio	ns for Program PCF 0	Control		Decisions for Pro	gram										+ New Decisi	on 💍 Ref	resh :
			Ö	\checkmark Name \lor				Ass	gned To \checkmark	Status	Reason 🗸	$ _{\rm Priority} \lor$		Due Date ↑	∽ ∣ Cate	gory 🗸	
	1			C Develop	ment approach			Ma	lcom Hamilt	on Activ	e	1 High		24-Apr	-20 Res	ource	
	Overdu	e															

- d. Update any field, as required.
- e. Click Save & Close.

D	evelopment ap	proach				
De	ecision etails					
Ī	Name	* Development approach			Escalation Required	Yes
	Description	Will we manage all of the develop	ment internally, outsource, or coo	ordinate with platform	Escalation Manager	A Bob Banker
					Decision Date	26-Apr-20
	Status	Active			Approver	A Bill Speker
	Priority	High	Medium	Low	Assigned To	A Malcom Hamilton
	Due Date	24-Apr-20		Ē		
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Recording and managing change requests

Portfolio/Program Manager

Portfolio IQ – Changes tab

1. CREATE NEW CHANGE REQUEST

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the Changes tab.

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ь	eadership		Progra	m			Business Case		Program Status		
41	Insights		Nan	Name Cassowary Product Development			Overview Th	This program will provide for a mobile support	Program Completion		
85	Portfolios	A	Des	cription	This program includes projects ass	ociated with the		lines to continue meeting the needs of our			
Ŀ	Programs				Cassowary line of Products.		Ontinge	Customers, and reduce our raw material			
Ir	ntake						Options	establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.		10%	

c. Click +New Change Request.

Cassowary Product Development Program						2020 IT Portfolio Portfolio	Fred Sample Sponsor	Active Status
Details Strategic Goals Key Dates Projects	Status Updates Stakeholders Issues Risks	Decisions Changes	Constraints Ass	sumptions Lessons	Benefits	Documents		
Change Requests PCF Control	Change Requests for Program					C + New Change Reque	st 🖱 Refresh	n E
C	\checkmark Name \checkmark	Due Date ↑ 🗸	Category ~	Assigned To \checkmark	Priority \sim	Status Reason 🗸 🛛 C	ost Estimate \vee	
	15 potential projects for customer focus group	29-Jun-20	Management Esc	. Bill Speker	1 High	New	\$60,000.00)
	Multi-Mobile Platform	23-Aug-20	Scope	Kenneth Steiness	1 High	New	\$25,000.00)
2								
Change Requests								

- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the change request in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.

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Job Aid | Collaborating on portfolio and program support items

Name	*	
Description		
Driven By		
Implementation Date		Ē
Category		
Priority	Medium	
Assigned To		
Work Effort Estimate		
Work Effort Details		
Cost Estimate		
Cost Estimate Details		
Duration Estimate		
Duration Estimate Details		
Resource Impacts		
Impact on Other Projects		
Assumptions		
Approved / Rejected By		

2. UPDATE CHANGE REQUESTS

- a. Ensure you have the appropriate portfolio or program open in **Portfolio IQ.**
- b. Click the **Changes** tab.

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Leadership	Program	Business Case	Program Status						
ẩ Insights ₽° Portfolios	Name * Cassowary Product Development	Overview This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the peeds of our	Program Completion						
Lill Programs	Description This program includes projects associated with the Cassowary line of Products.	customers, and reduce our raw material							
Intake		Options Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	10%						

c. Click on the Change Request to be updated from the list.

Cassowary Product Development Program					2020 IT Portfolio Portfolio	Fred Sample Active Sponsor Status
Details Strategic Goals Key Dates Projects	Status Updates Stakeholders Issues Risks	Decisions Changes Const	raints Assumptions Lesson	s Benefits Do	ocuments	
Change Requests PCF Control	Change Requests for Program				+ New Change Requ	Jest 🖔 Refresh 🗄
0	✓ Name ∨	Due Date ↑ 🖂 Catego	y ∽ Assigned To ∽	Priority \checkmark	Status Reason \lor	Cost Estimate 🗸
	15 potential projects for customer focus group	29-Jun-20 Mana	gement Esc Bill Speker	1 High	New	\$60,000.00
	C Multi-Mobile Platform	23-Aug-20 Scope	Kenneth Steiness	↑ High	New	\$25,000.00
2						
Change Requests						

d. Update any field, as required.

e. Click Save & Close.

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N Cł	lulti-Mobile Platfor ange Request etails	m		Cassowary Product Developm Portfolio Program	en'
					1
	Name *	Multi-Mobile Platform	Duration Estimate	4	
	Description	The original project addressed the Android platform only. Now we need to include all platforms.	Duration Estimate Details	Will need multiple resources with the appropriate skillsets	
	Driven By	π	Resource Impacts	will need to re-prioritize existing scope items	
	Implementation Date	28-May-20			
	Category	Scope	Impact on Other Projects	two other projects will be delayed	
	Priority	High Medium Low	Assumptions	Resources with the appropriate skillset are available.	
D	Assigned To	R Kenneth Steiness			
	Work Effort Estimate	1,000	Approved / Rejected By		
	Work Effort Details	Establish development and test environments, develop, test, deploy	Approved / Rejected Date		
			Due Date	23-Aug-20	
	Cost Estimate	\$25,000.00	Status	New	
	Cost Estimate Details	Infrastructure/labor			

Documenting constraints

Portfolio/Program Manager

1. CREATE NEW CONSTRAINT

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the Constraints tab.

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Leadership 소개 Insights IF* Portfoli	ts	A	Program Name Description	* Cassowary Product Development This program includes projects associated with the	Business Case Overview	This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material	Program Status Program Completion	
Intake	ts			cassowary line of Froducts.	Options	Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.		10%

c. Click +New Constraint.

Ca Pro	assowary Product Dev	elopment													2020 IT Portfolio Portfolio	Fred Sample Sponsor	Active	, ~
De	tails Strategic Goals Ke	ey Dates Pro	jects Status Updates	Stakeholders	Issues	Risks	Decisions	Changes	Constraints	Assumption	is Less	ons I	Benefits	Documer	its			
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	\checkmark Name \uparrow \checkmark				Ca	stegory 🗸	,				Cons	straint \vee						
	Hiring Freeze in effect				Re	esource	s				Nev	w hires a	are not likel	y for the n	ext 4-6 months			

- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the constraint in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.

Portfolio IQ – Constraints tab



2. UPDATE CONSTRAINTS

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Constraints** tab.

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Leadership 4월 Insights ም Portfolios	Program Name Cassowary Product Development Description This program includes projects associated with the Cassowary line of Products.	Business Case Program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material v	
Intake		Options Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	10%

c. Click on the **Constraint** to be updated from the list.

Casso Program	wary Product Development		2020 IT Portfolio Fred Sample Active Sponsor Status
Details	Strategic Goals Key Dates Projects Status Updates	Stakeholders Issues Risks Decisions Changes	raints Assumptions Lessons Benefits Documents
Cons	traints for Program		+ New Constraint 🖄 Add Existing Constraint 🖒 Refresh 🗄
	Name ↑ ∨	Category \checkmark	Constraint \lor
C	Hiring Freeze in effect	Resources	New hires are not likely for the next 4-6 months

- d. Update any field, as required.
- e. Click Save & Close.



Capturing assumptions

👗 🛛 Portfolio/Program Manager

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Portfolio IQ – Assumptions tab

1. CREATE NEW ASSUMPTION

- a. Ensure you have the appropriate portfolio or program open in **Portfolio IQ.**
- b. Click the Assumptions tab.

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Leadership		Program			Business Case					Program Status		
ណ៍ Insights		Name *	Cassowary Product Development		Overview	This program	m will provide for	r a mobile support		Program Complet	tion	
88° Portfolios		Description	This program includes projects associated with the			lines to cont	itinue meeting the	e needs of our				
🖽 Programs			Cassowary line of Products.			customers, a	and reduce our re	aw material 🔹				
Intake ओं Insights					Options	Outsourcing establish a f requirement allow us to r	g the development focus group to ga its; establish a sup reduce inventory.	nt of the mobile app; ather customer oply chain that will				10%

c. Click +New Assumption.

Cassowary Product Development Program		2020 IT Portfolio Portfolio	Fred Sample Active Sponsor Status
Details Strategic Goals Key Dates Projects Status Updates Stakeholders I	ssues Risks Decisions Changes Constraints	Assumptions Lessons Benefits Documents	ትድ 1 Group Mem
Assumptions for Program		C + New Assumption 🖄 Add Existing Assumpt	ti 🖒 Refresh 🗄
✓ Name ↑ ∨	Category >>	Assumption \vee	
Project staffing requirements will be satisfied	Timeline	Project schedule will not be impacted due to unavailability of rese	ources

- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the assumption in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.



2. UPDATE ASSUMPTIONS

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Assumptions** tab.



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Leadership		Program		Business Case		Program Status	
ភាវី Insights		Name	* Cassowary Product Development	Overview	This program will provide for a mobile support ^ app, the introduction of three new product	Program Completion	
88° Portfolios	A	Description	This program includes projects associated with the Cassowary line of Products.		lines to continue meeting the needs of our customers, and reduce our raw material *		
Intake				Options	Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.		10%

c. Click on the Assumption to be updated from the list.

Cassowary Product Development Program		2020 IT Portfolio Fred Sample Active Portfolio Sponsor Status
Details Strategic Goals Key Dates Projects Status Updates Stakeholders Issue	s Risks Decisions Changes Constraints Assumptions I	Lessons Benefits Documents 🛠 1 Group Men
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Project staffing requirements will be satisfied	imeline Project sche	edule will not be impacted due to unavailability of resources

- d. Update any field, as required.
- e. Click Save & Close.

Pr	roject staffing re	quirements will be satisfied	2020 IT Portfolio Portfolio	Cassowar Program
Ge	eneral Related			_
	Name	* Project staffing requirements will be satisfied		
	Description	This project is the highest priority project in the organization. Resource Management has assured us that other projects will be delayed as needed to ensure all requer	sted resources are available.	

Capturing lessons learned

Program Manager

Portfolio IQ – Lessons tab

1. CREATE NEW LESSON LEARNED

- a. Ensure you have the appropriate program open in Portfolio IQ.
- b. Click the **Lessons** tab.

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🕍 Insights		✔ Name ↑ ∨ Created By ∨ Ca	itegory † 🗸
I ^{a*} Portfolios		Open lines of communication Deirdre Rogusky BL	usiness Process
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c. Click +New Lesson Learned.



	Cassowary Product Development Program														
	Details	Strategic Goals	Key Dates	Projects	Status Updates	Stakeholders	Issues	Risks	Decisions	Changes	Constraints	Assumptions	Lessons	Benefits	Documents
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	0	Open lines of comn	nunication					Deird	re Rogusky				Busi	ness Process	;
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- d. Fill in the Name field. It is mandatory and should be clear and concise to help users identify the lesson learned in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click Save and Close.

	Quick Create: Less	on Learned	×
D	Name	*	
	Category		
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	Observation		
E	Recommendation)	
	Lesson Learned		
	Action Taken		
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2. UPDATE LESSONS LEARNED

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Lessons** tab.

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Leadership வி Insights		Program Name * Cassowary Product Development	Business Case Overview	P This program will provide for a mobile support	Program Status Program Completion	
Portfolios		Description This program includes projects associated with the Cassowary line of Products.	Ortions	app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material Cutterwise the daminament of the matrix		
Intake			options	establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.		10%

c. Click on the Lesson Learned to be updated from the list.

Cassowary Product Development Program														
Details	Strategic Goals	Key Dates	Projects	Status Updates	Stakeholders	Issues	Risks	Decisions	Changes	Constraints	Assumptions	Lessons	Benefits	Documents
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d. Update any field, as required.



e. Click Save & Close.

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	Open lines of communication Lesson Learned		Cassowary Product Development Project
	Name * Open lines of communication	Observation	Everyone on the team freely shares information which is keeping us on target.
	Category Business Process	Recommendation	N/A
		Lesson Learned	The team can move faster when everyone keeps open lines of communication.
		Action Taken	Recognized the team and made this point to everyone so they could understand the full impact of keeping each informed.

Managing documents

Portfolio/Program Manager



1. UPLOAD NEW DOCUMENTS

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Documents** tab.

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G Home ③ Recent ∨ ☆ Pinned ∨	Cassowary Product Development Program Details Strategic Goals Key Dates Projects Status Updates Stakeh	olders Issues Risks Decisions Changes Constraints Assumptions Lessons 🖪	2020 IT Portfolio Portfolio Documents
Leadership Al Insights I ^{pe} Portfolios	Program Name Cassowary Product Development Description This program includes projects associated with the Operating of Denerativities of Denerativitities of Denerativities of Denerativities of Denerativities of	Business Case Program SI provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our curdomers, and feduce our wina material -	atus Completion
Intake	Constraintly Bill OF FTUDUCS.	Options Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.	10%

c. Click Upload.



- d. Browse and select the new document to be added to the repository.
- e. Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.





2. VIEW OR UPDATE EXISTING DOCUMENTS

- a. Ensure you have the appropriate portfolio or program open in Portfolio IQ.
- b. Click the **Documents** tab.



c. Click on the appropriate document/tile to open it.



d. Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.



