

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.

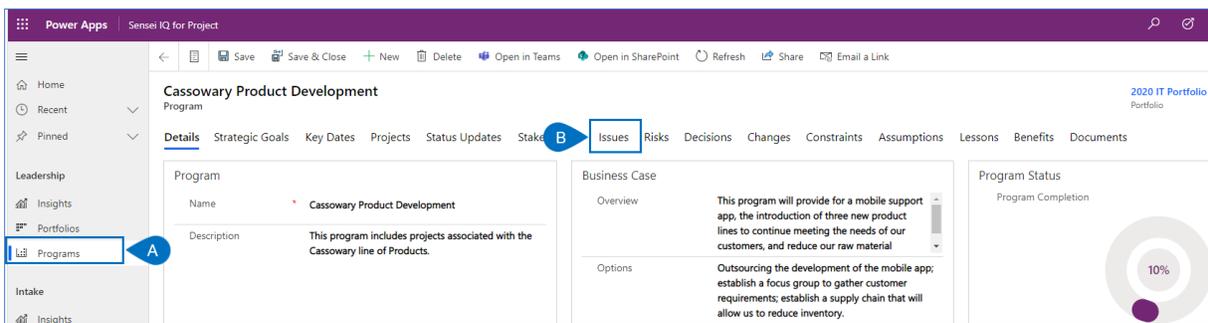
Managing issues

 Program Manager

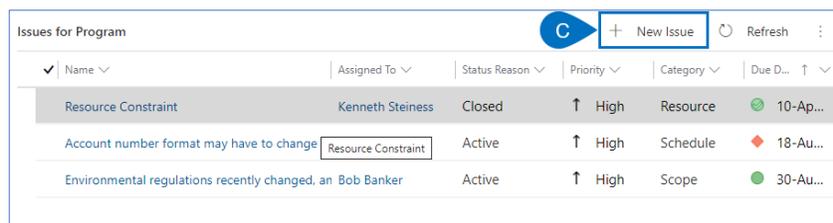
 Portfolio IQ – Issues tab

1. CREATE NEW ISSUE

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

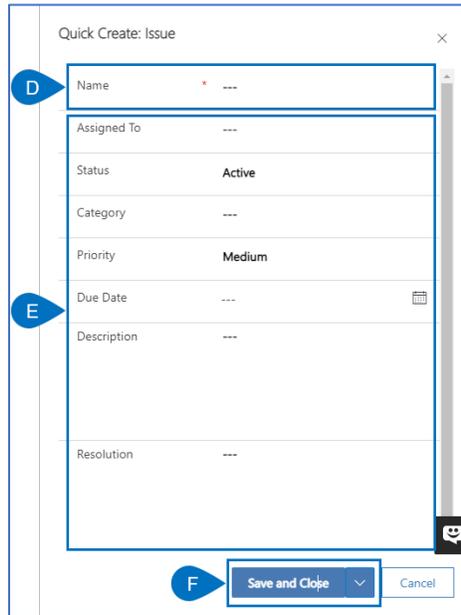


- c. Click **+New Issue**.



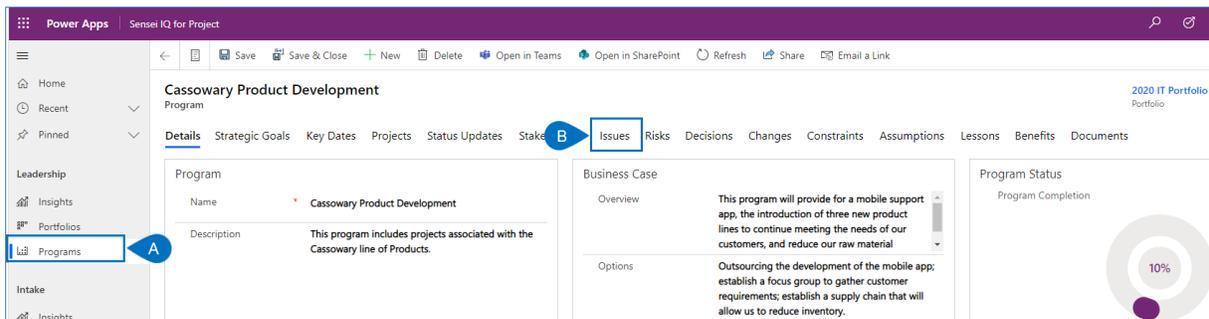
IQ Job Aid | Collaborating on portfolio and program support items

- 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**.

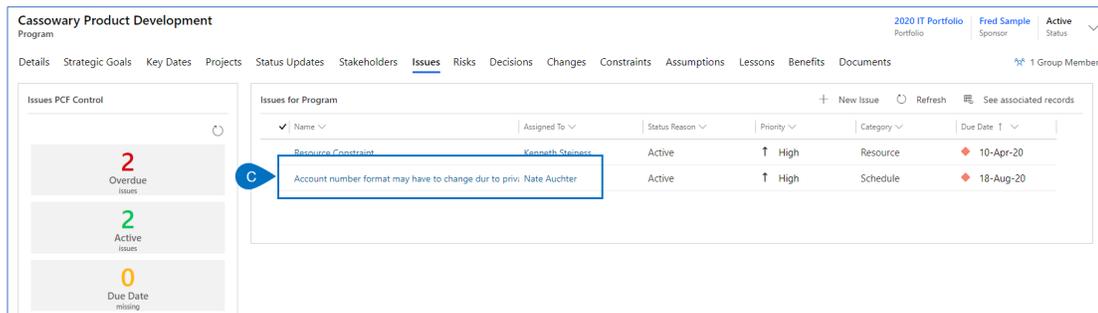


2. UPDATE ISSUES

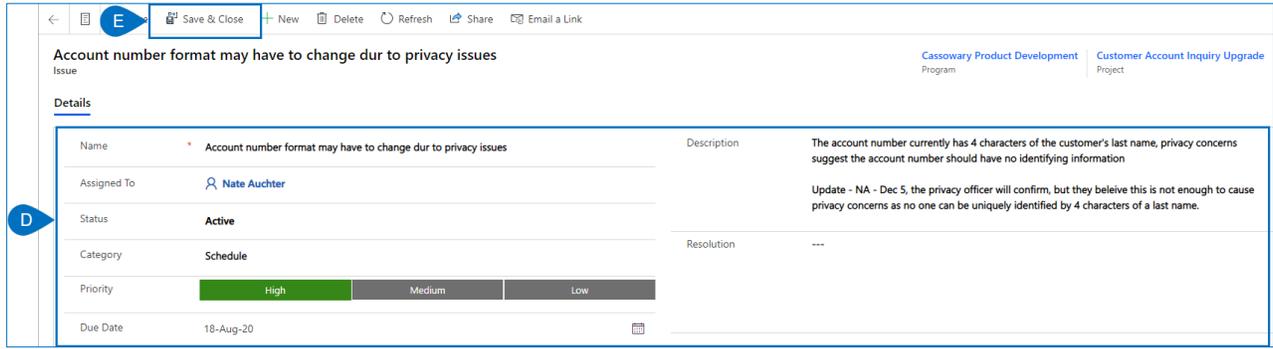
- a. Ensure you have the appropriate program open in **Portfolio IQ**.
- b. Click the **Issues** tab.



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



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



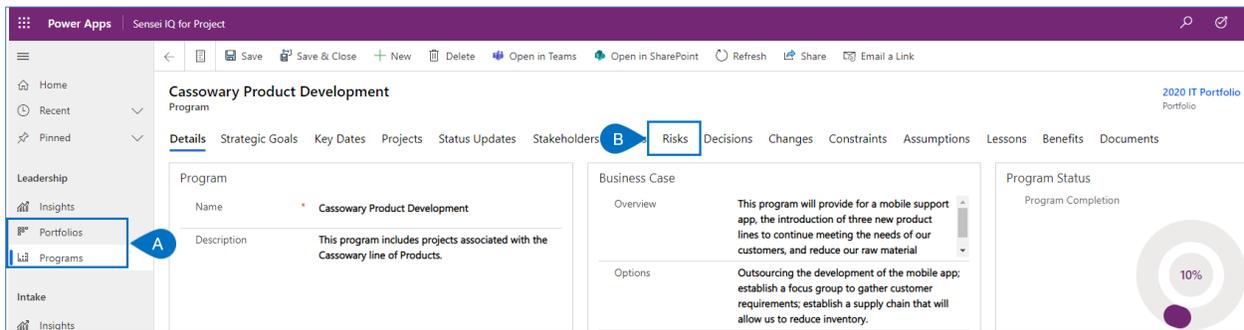
Managing risks

Portfolio/Program Manager

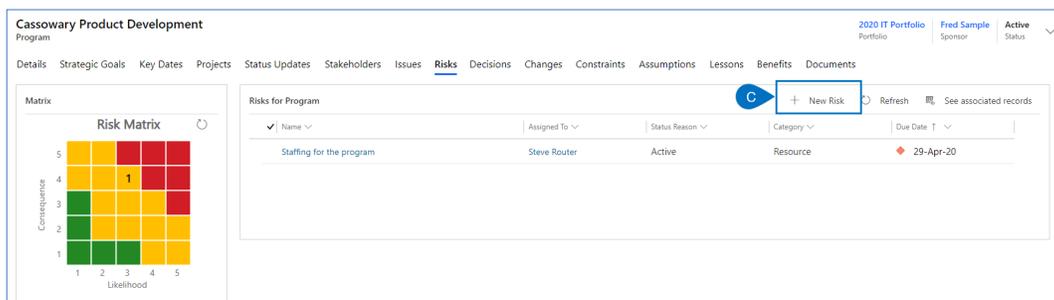
Portfolio IQ – Risks tab

1. CREATE NEW RISK

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



- Click **+New Risk**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

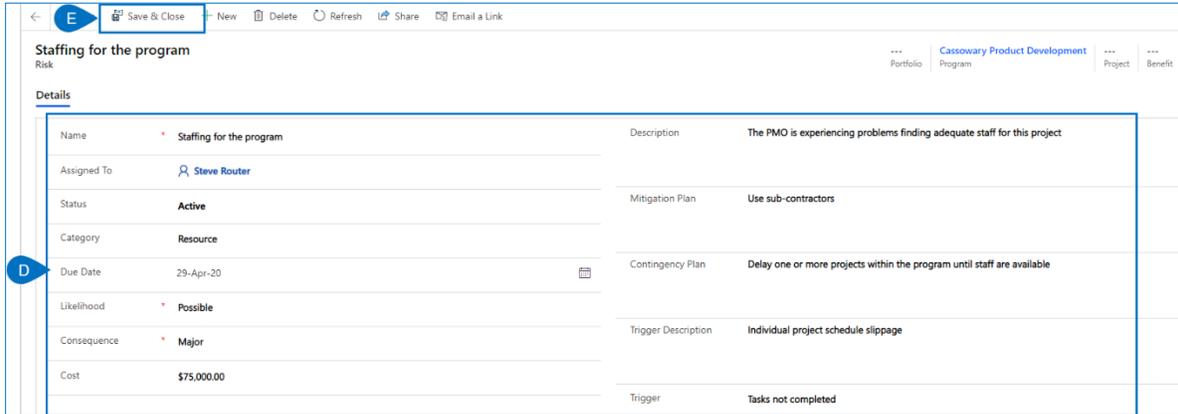
2. UPDATE RISKS

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

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

IQ Job Aid | Collaborating on portfolio and program support items

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



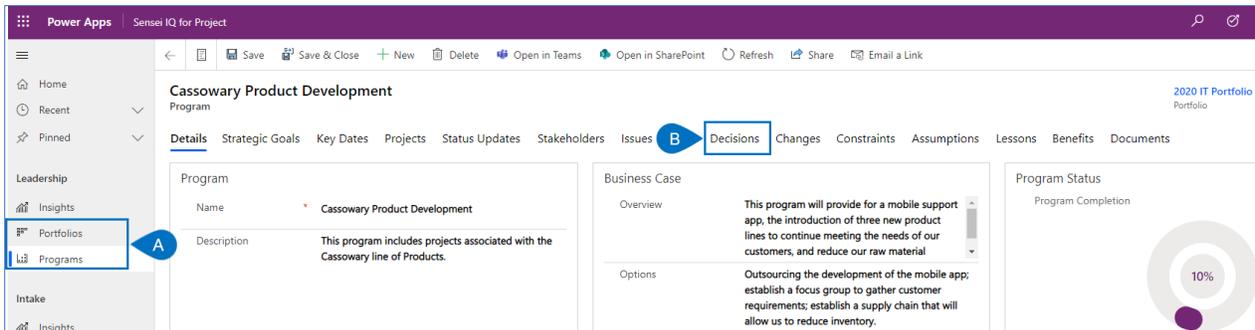
Tracking decisions

 Portfolio/Program Manager

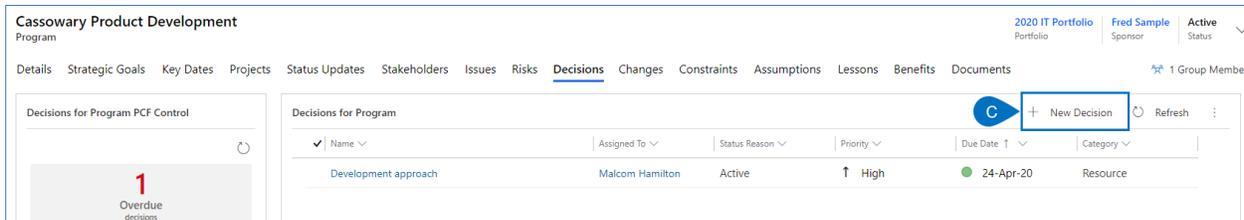
 Portfolio IQ – Decisions tab

1. CREATE NEW DECISION

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



- c. Click **+New Decision**.



- 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**.

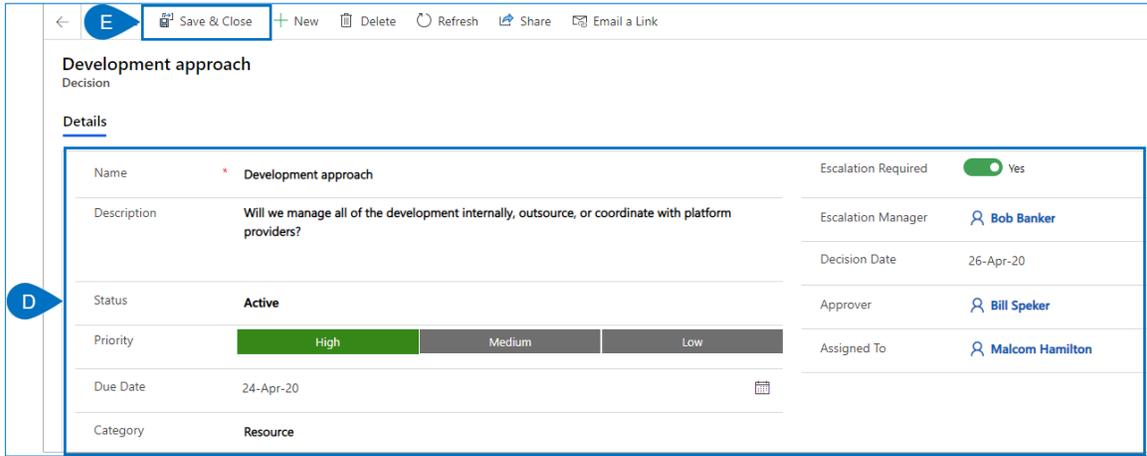
2. UPDATE DECISIONS

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

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

Name	Assigned To	Status Reason	Priority	Due Date	Category
Development approach	Malcom Hamilton	Active	High	24-Apr-20	Resource

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



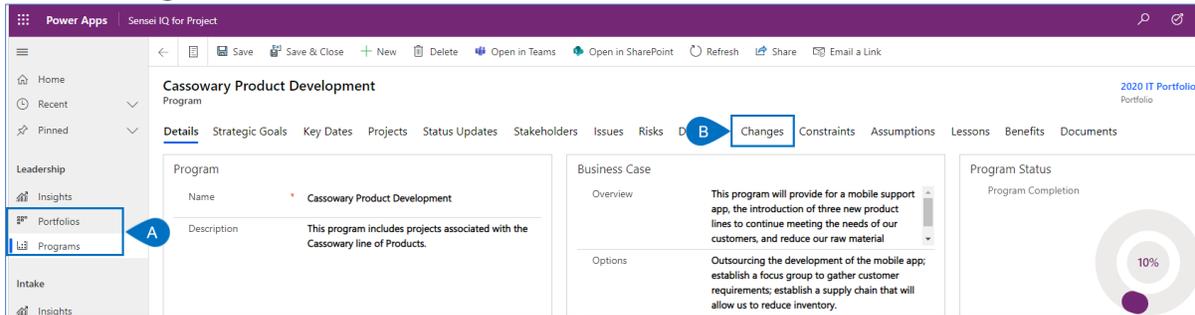
Recording and managing change requests

Portfolio/Program Manager

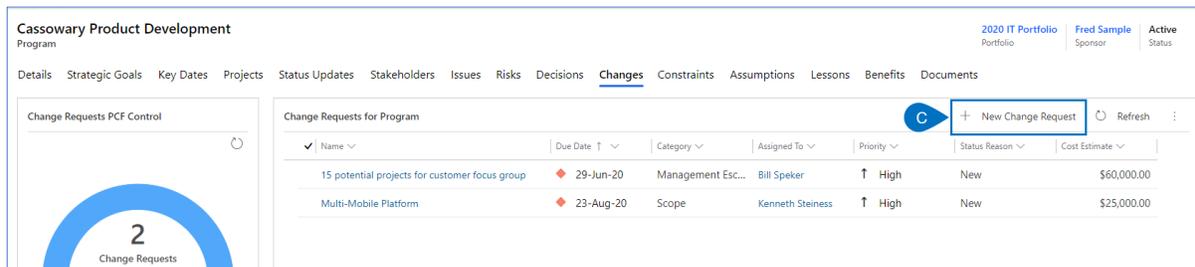
Portfolio IQ – Changes tab

1. CREATE NEW CHANGE REQUEST

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



- Click **+New Change Request**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Change Request

Name * ...

Description ...

Driven By ...

Implementation Date ...

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 ...

Save and Close Cancel

2. UPDATE CHANGE REQUESTS

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

Power Apps Sensei IQ for Project

Cassowary Product Development Program

2020 IT Portfolio Portfolio

Details Strategic Goals Key Dates Projects Status Updates Stakeholders Issues Risks **Changes** Constraints Assumptions Lessons Benefits Documents

Program Name: Cassowary Product Development

Description: This program includes projects associated with the Cassowary line of Products.

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.

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.

Program Status: Program Completion 10%

- Click on the **Change Request** to be updated from the list.

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 Assumptions Lessons Benefits Documents

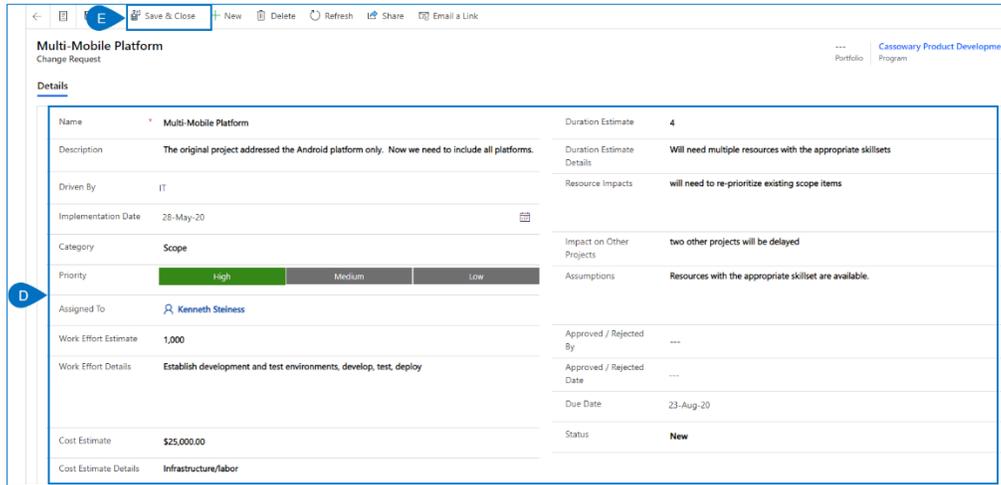
Change Requests PCF Control

Change Requests for Program

Name	Due Date	Category	Assigned To	Priority	Status Reason	Cost Estimate
15 potential projects for customer focus group	29-Jun-20	Management Esc...	Bill Speker	High	New	\$60,000.00
Multi-Mobile Platform	23-Aug-20	Scope	Kenneth Steiness	High	New	\$25,000.00

- Update any field, as required.

e. Click **Save & Close**.



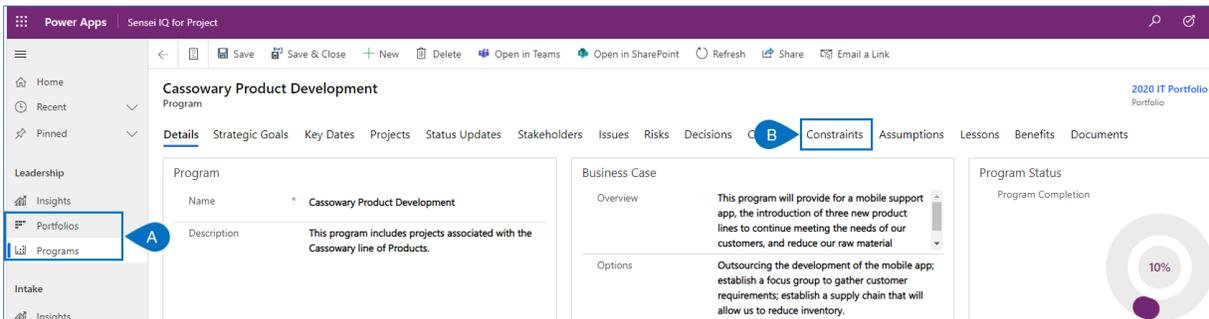
Documenting constraints

Portfolio/Program Manager

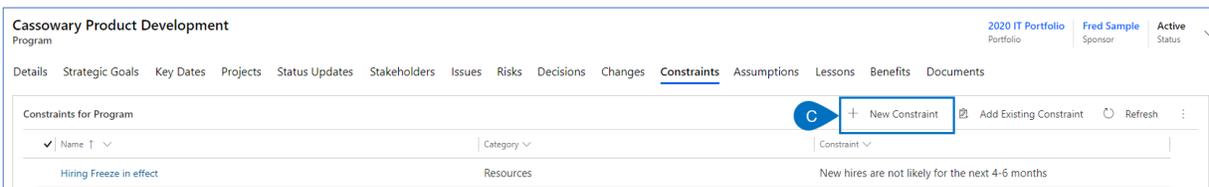
Portfolio IQ – Constraints tab

1. CREATE NEW CONSTRAINT

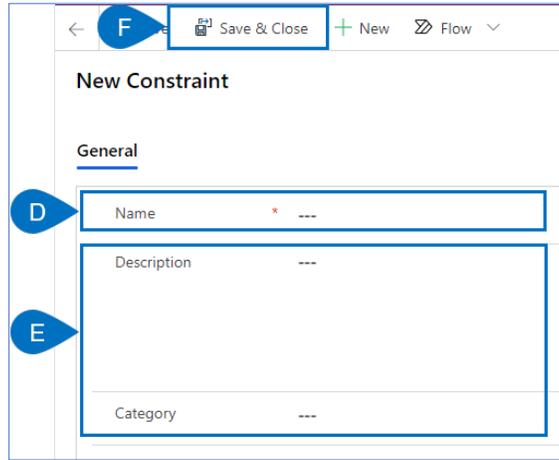
- Ensure you have the appropriate portfolio or program open in **Portfolio IQ**.
- Click the **Constraints** tab.



c. Click **+New Constraint**.

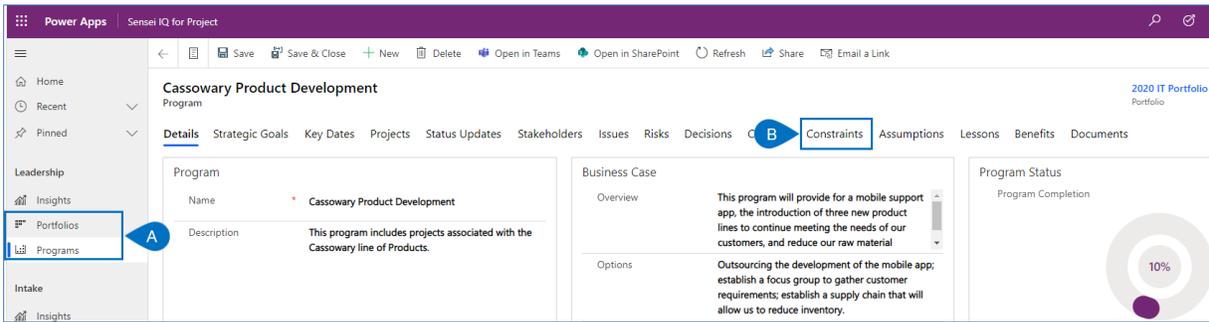


- Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the constraint in screens, reports, and dashboards.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

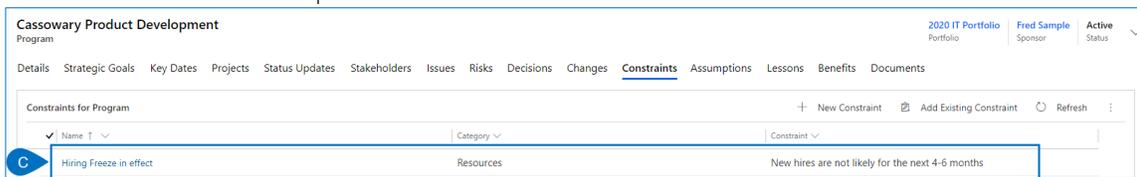


2. UPDATE CONSTRAINTS

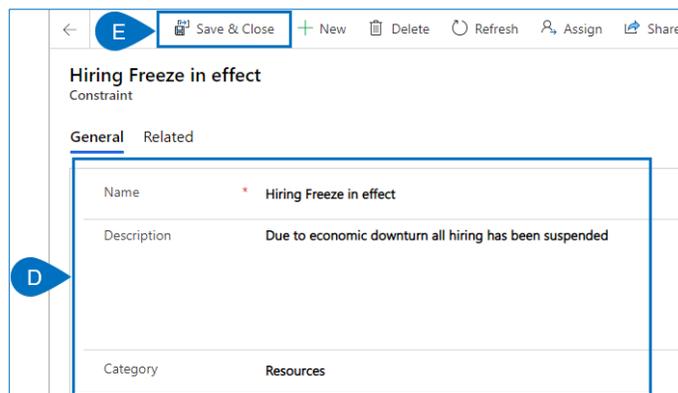
- Ensure you have the appropriate portfolio or program open in **Portfolio IQ**.
- Click the **Constraints** tab.



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



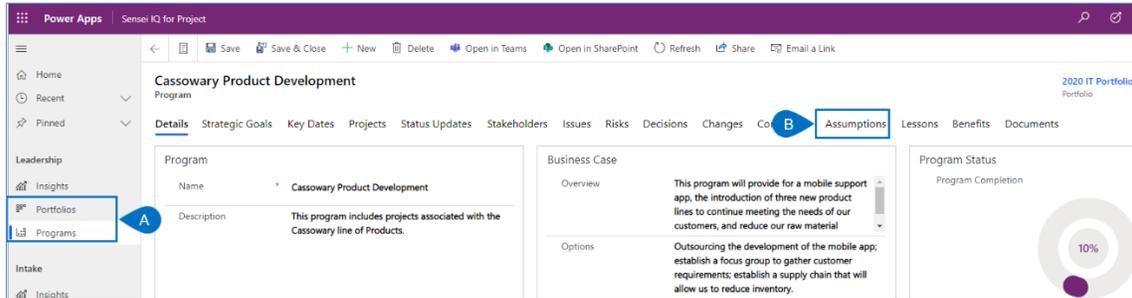
- Update any field, as required.
- Click **Save & Close**.



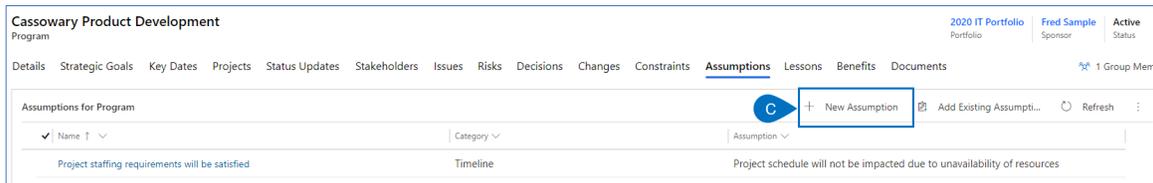
Capturing assumptions

1. CREATE NEW ASSUMPTION

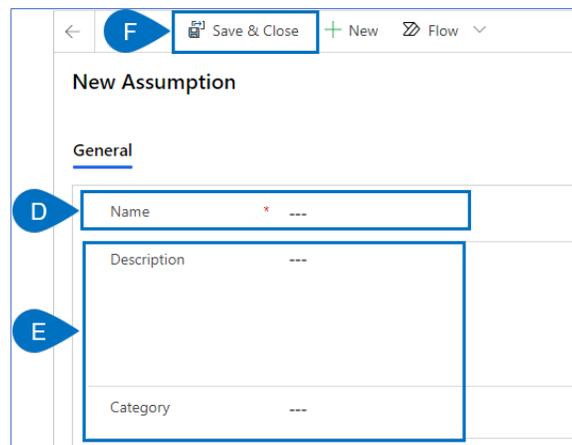
- Ensure you have the appropriate portfolio or program open in **Portfolio IQ**.
- Click the **Assumptions** tab.



- Click +New Assumption.

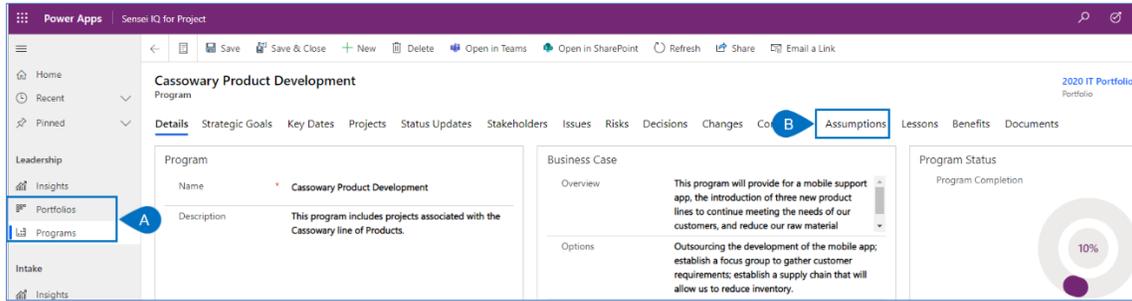


- Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the assumption in screens, reports, and dashboards.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

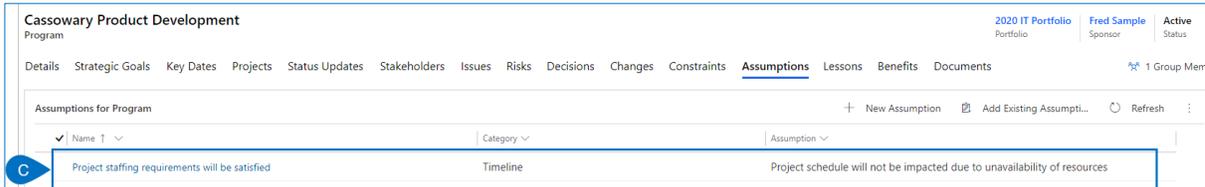


2. UPDATE ASSUMPTIONS

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

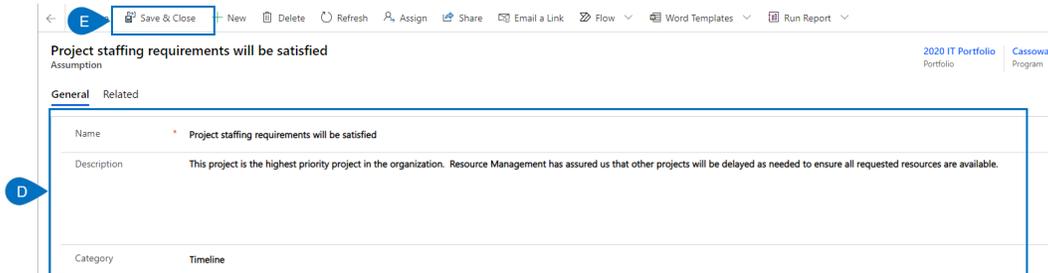


c. Click on the **Assumption** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



Capturing lessons learned

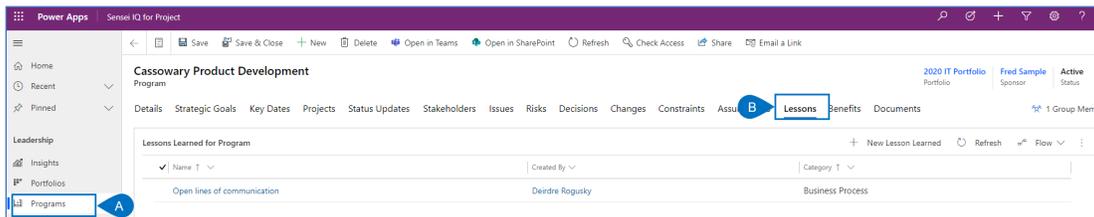
 Program Manager

 Portfolio IQ – Lessons tab

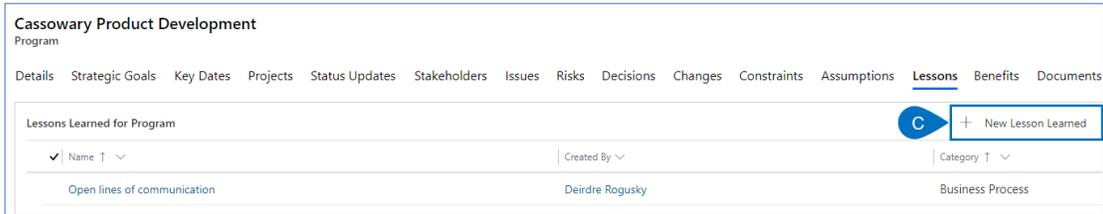
1. CREATE NEW LESSON LEARNED

a. Ensure you have the appropriate program open in **Portfolio IQ**.

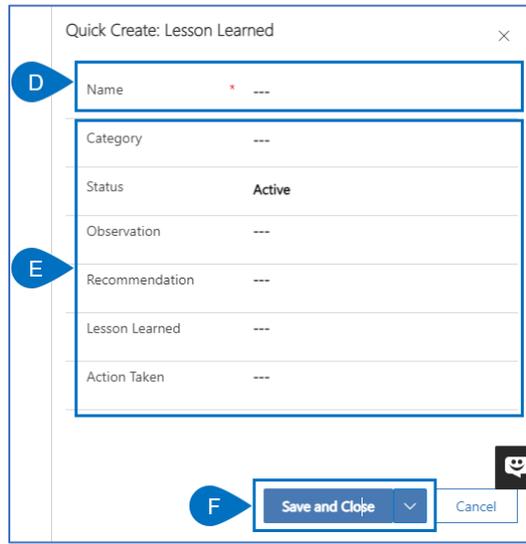
b. Click the **Lessons** tab.



c. Click **+New Lesson Learned**.

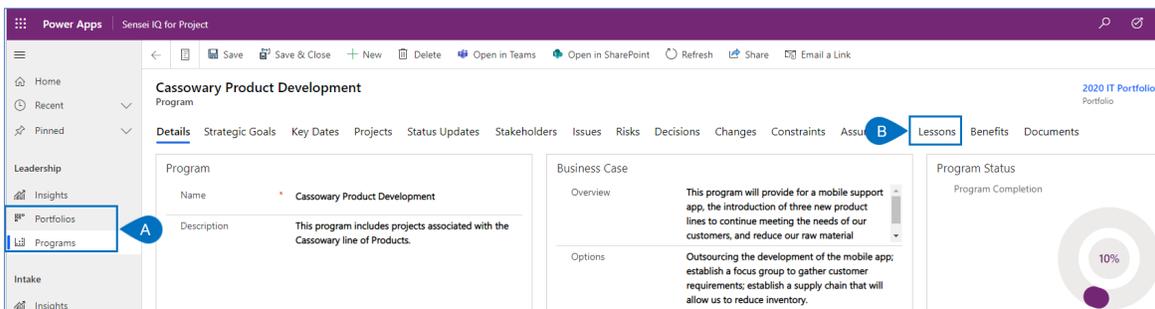


- d. Fill in the Name field. It is mandatory and should be clear and concise to help users identify the lesson learned in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

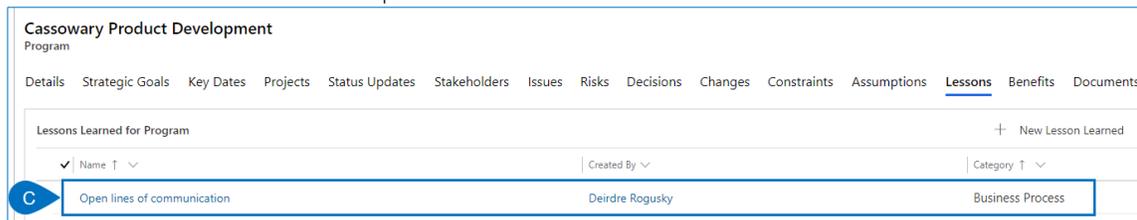


2. UPDATE LESSONS LEARNED

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

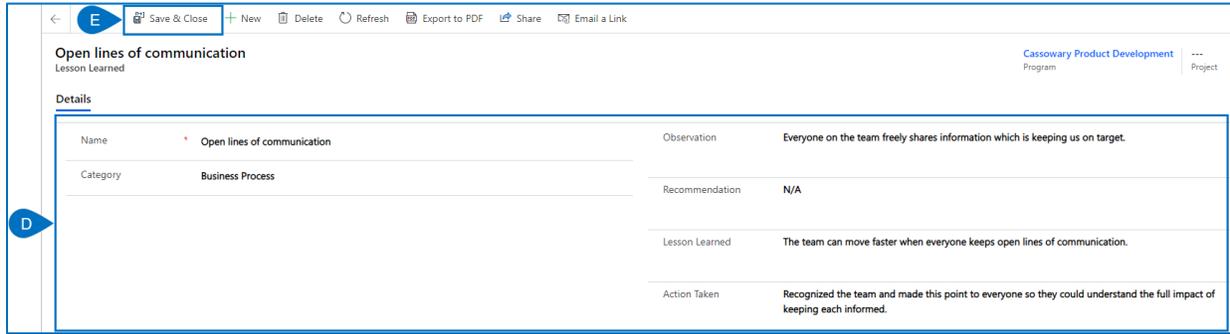


- c. Click on the **Lesson Learned** to be updated from the list.



- d. Update any field, as required.

e. Click **Save & Close**.



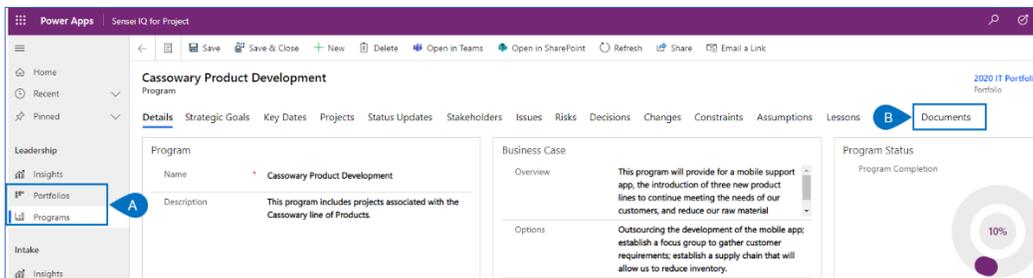
Managing documents

Portfolio/Program Manager

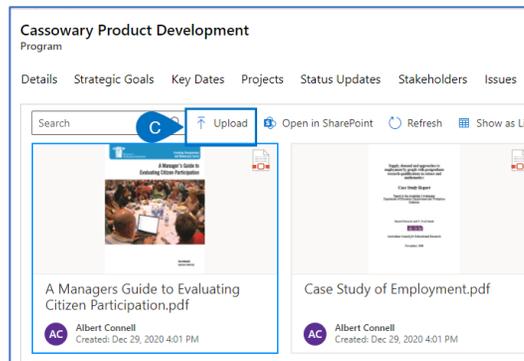
Portfolio IQ – Documents tab

1. UPLOAD NEW DOCUMENTS

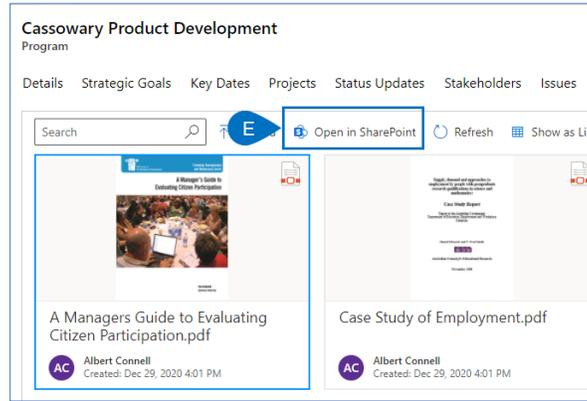
- Ensure you have the appropriate portfolio or program open in **Portfolio IQ**.
- Click the **Documents** tab.



c. Click **Upload**.

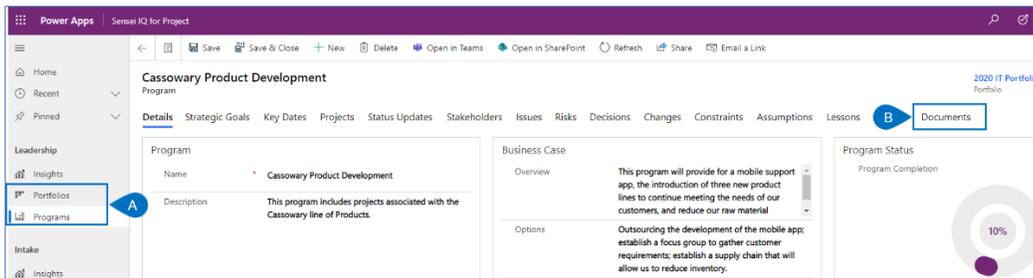


- Browse and select** the new document to be added to the repository.
- Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.

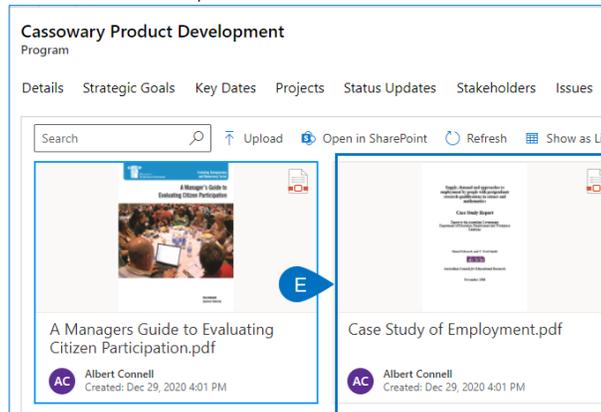


2. VIEW OR UPDATE EXISTING DOCUMENTS

- 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.

Cassowary Product Development
Program

Details Strategic Goals Key Dates Projects Status Updates Stakeholders Issues

Search  **D**  Open in SharePoint  Refresh  Show as List

 <p>A Managers Guide to Evaluating Citizen Participation.pdf Albert Connell Created: Dec 29, 2020 4:01 PM</p>	 <p>Case Study of Employment.pdf Albert Connell Created: Dec 29, 2020 4:01 PM</p>
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