

Overview

This Job Aid defines the steps to follow for creating portfolios and programs in Sensei IQ.

Portfolio IQ allows you to combine projects into either portfolios or programs. This allows you to define and control the details at the project level while also enabling big picture management for larger initiatives.

There are four (4) core actions for creating portfolios and programs. Only the first and last are mandatory.

- 1. Documenting Charter/Business Case
- 2. Capturing Key Dates
- 3. Identifying Stakeholders
- 4. Adding related programs/projects

Documenting Charter/Business Case

Portfolio/Program Manager

Portfolio IQ – Portfolio (or Program) - Details

1. CAPTURE THE CHARTER/BUSINESS CASE

a. Ensure you are in Portfolio IQ, and click Portfolios (or Programs) in the Leadership section.

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b. Click + **New** from the command bar.



- c. Complete the Portfolio (or Program) pane with as much information as you have now.
- d. The Portfolio (or Program) Name field is mandatory.



e. Similarly, complete the Charter (or Business Case) pane with the information currently available.





f. Click Save (or Save & Close) to create the Portfolio (Program).

ि हिंग Save 8 lew Portfolio	Close + New			
etails Strategic Goals	Key Dates Programs/Projects Stakeholders	Risks Decisions Chang	es Constraints Assumption	ons Benefits
Portfolio		Charter		
Name	Organization wide cloud migration	Justification		
Description	Improvements in performance and reliability and a significant cost reduction dictate an aggressive			
	migration to cloud based applications.	Vision		
Department	HR	Scope		
Investment Category	Run Grow Transform			
Location	Denver	Benefits Strategy		

2. BUILD THE TEAM

- a. Select **Portfolios** (or **Programs**) from the Site Map to display the list of Active Portfolios (Active Programs).
- b. Adjust the view as needed to ensure the one you are looking for is displayed.
- c. Select the Portfolio (or Program) to be updated.



- d. Select the header.
- e. Search for and select the **Sponsor**.



Creating Portfolios and Programs



- f. Click Group Members.
- g. Search for and add members to the Microsoft 365 group.
- h. Click Create.
- i. Click Save & Close to finish.



Capturing Key Dates

Portfolio/Program Manager

⁹⁹ Portfolio IQ – Portfolio (or Program) – Key Dates

1. CAPTURE KEY DATES

- a. Ensure you have the appropriate portfolio (or program) open in Portfolio IQ.
- b. Click the Key Dates tab.
- c. Click +New Key Date.



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Organization wide cloud migration				Cindy Process Sponsor Status
Details Strateg B Key Dates Programs/Projects Stakeho	lders Risks Decisions Changes Cons	traints Assumptions Benefits	Documents	☆ 4 Group Members
Key Dates for Portfolio				
Search \mathcal{P} Filter from 🛅 Filter to	📰 😪 🕞 🕒 🕂 New Key Date	🕐 Refresh		
♦ High Risk ▲ At Risk	On Track	Not Set	🧭 Done	
+ New Key Date + New Key Date	+ New Key Date	+ New Key Date	+ New Key Date	
	Q3 Integration Review Review all projects to ensure documente	li		
	□ 15-Apr-21			

d. Complete the **Quick Create Key Date** form and then click **Save and Close** from the bottom.



e. Set the status by dragging and dropping the **Key Dates** card to the appropriate **Status** column. If you used the **+New Key Date** under the appropriate KPI column this step is not necessary.

etails Strategic Goals Key Dat	es Programs/Projects Stake	holders Risks Decisions Changes Constr	aints Assumptions Benefits	Documents 🏘 4 Group 1
ey Dates for Portfolio				
Search \mathcal{P} Filter f	rom 🛅 Filter to	📾 🕆 Clear Filters 🕂 New Key Date	🕐 Refresh	
🔶 High Risk	🔺 At Risk	On Track	Not Set	😡 Done
+ New Key Date	+ New Key Date	+ New Key Date	+ New Key Date	+ New Key Date
	←	Q3 Integration Review Review all projects to ensure documented integration points are on schedule.		

Identifying Stakeholders

- Portfolio/Program Manager
- Portfolio IQ Portfolio (or Program) Stakeholders

1. IDENTIFY STAKEHOLDERS

- f. Ensure you have the appropriate portfolio (or program) open in Portfolio IQ.
- g. Click the **Stakeholders** tab.
- h. Click +New Stakeholder.



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Organi ^{Portfolio}	ization wide cl	oud migra	ition								
Details	Strategic Goals	Key Dates	Programs/Projects	Stakeholders	BDecisions	Changes	Constraints	Assumptions	Benefits		
Stakeho	olders for Portfolio									C	+ New Stakeholder
~	Name î 🗸				Description \lor						Communications frequency \vee
						1	No data availa	ole.			

- i. Complete the **New Stakeholder** form.
- j. Click Save & Close to finish.

E	🖌 🖬 Save & Close 🕂 New
	New Stakeholder
	General
D	Name *
	Description
	Role on project
	Communications requirements
	Communications frequency

Adding related programs/projects

Portfolio/Program Manager

Portfolio IQ -Portfolio (or Program) – Programs/Projects

Project IQ – Project Header

Portfolio IQ – Program Header

1. ADD RELATED PROGRAMS/PROJECTS

- a. Ensure you have the appropriate portfolio (or program) open in Portfolio IQ.
- b. Click the Programs/Projects (or Projects) tab.
- c. Click Add Existing Program (or Add Existing Project).



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Creating Portfolios and Programs

Organization wide clo Portfolio	ud migration						Sponsor	Active Status
Details Strategic Goals	Ke Programs/Projects Stakeholders	Risks Decisions Changes	Constraints Assum	ptions Benefits				
Programs for Portfolio					+ New F 🕑 🖄	Add Existing Program	C Refrest	n i
✓ Name ∨	% Complete 🗸 Spon	isor ∨ Departm	ent \lor	Start Date \checkmark	Finish Date 🏌 🗸	Status Reason \vee		
		N	o data available.					
Projects for Portfolio					+ New C 🖄	Add Existing Project	🖒 Refresi	n :
Projects for Portfolio	Project Type \checkmark	Project Manager \vee	% Complete ∨	Sponsor V	+ New C	Add Existing Project Kinish Date ↑	© Refresi	n :

- d. Click All records if the record you are looking for is not shown.
- e. Select the appropriate **Program (or Project)**.
- f. Click Add.
- g. Click Save & Close.

Loc Sele	okup Records × ect record
Lo	ook for Records
Rec	ent records D All records
Ш	Sustainable Energy Program
놰	Acquisitions
놰	Employee Digital Experience
Lil.	Business Strategy
Lil.	Cassowary Product Development
Ŀ	Miami Campus Upgrade
+	New Record
	ę
	F Add Cancel

2. RELATE PROJECTS TO A PORTFOLIO/PROGRAM

- a. Ensure you have the appropriate project open in **Project IQ.**
- b. Open the **Project header.**
- c. Search for and select the appropriate Portfolio (Program).

Creating Portfolios and Programs



3. RELATE PROGRAMS TO A PORTFOLIO

- a. Ensure you have the appropriate program open in Portfolio IQ.
- b. Open the **Program header.**

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c. Search for and select the appropriate Portfolio

III Power Apps Sen	sei IQ for Project												
=	← 🗄 🖬 Save 🛱 Sa	ave & Close 🕂 New 🗊 Delete 🔿 Refresh 🛛	🛃 Sh	are 🛛 🕄 Email a Link									
Home Recent	Sustainable Energy P Program	rogram								 Portfolio	o Sponsor	riaga B	
🖉 Pinned 🔨	Details Strategic Goals	Key Dates Projects Status Updates Stake	holde	rs Issues Risks I	Decisions Changes	Constraints	Assumptions	Lessons BC	Portfolio		Look for Pe	artfolio	- P
2020 IT Portfolio	Program			Business Case				Program Status	Sponsor		A Francis	Luzuriaga	
Adequate Equipm	Name	Sustainable Energy Program		Overview				Program Comp	Status		Active		
All Active Ideas	Description	This program involves all projects related to creating or maintaining sustainable energy products.							-				_
Industry Advance				Options						0%			
Pre-review Design													
Loo doo bio				Benefits and				Program Effort					
Leadership 疝 Insights	Start Date	29-Mar-20		Disperients				Oh effort complet	ed		Oh	effort remaining	9
8º Portfolios	Finish Date	30-Dec-21		Justification				Program KPI Su	mmary				
E Programs	Department	π						Project		Cha	inge Kequests	•	
Intake	Investment Category	Run Grow Transform		Major Risks and				Schedule		Deli	iverables	٠	