

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

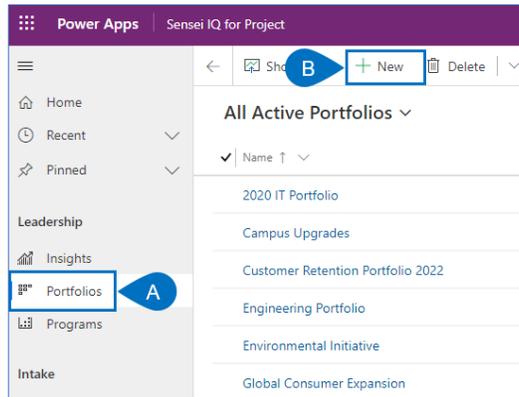
 Portfolio/Program Manager



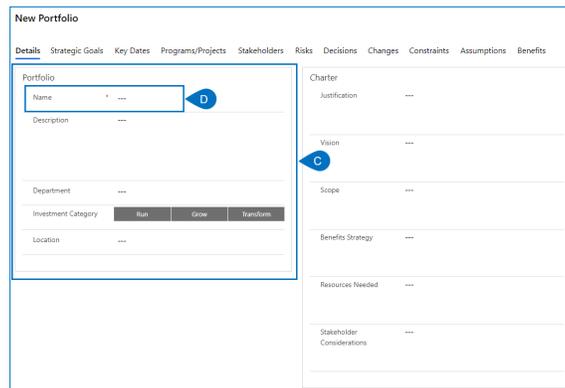
Portfolio IQ – Portfolio (or Program) - Details

### 1. CAPTURE THE CHARTER/BUSINESS CASE

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

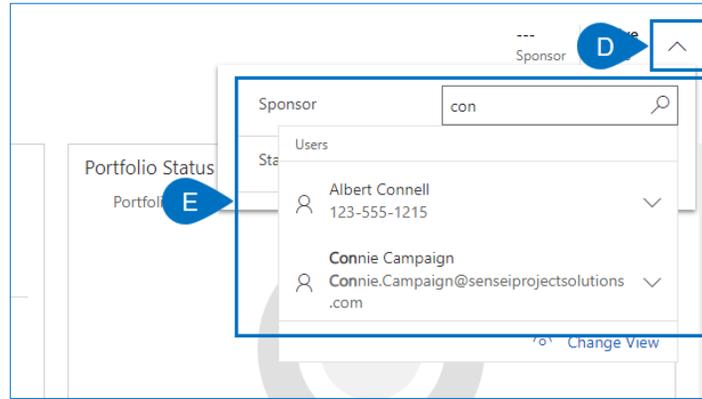
f. Click **Save** (or **Save & Close**) to create the Portfolio (Program).

## 2. BUILD THE TEAM

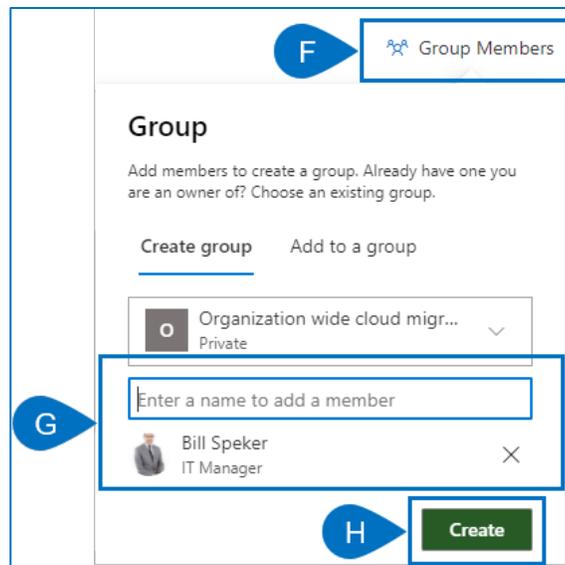
- Select **Portfolios** (or **Programs**) from the Site Map to display the list of Active Portfolios (Active Programs).
- Adjust the view as needed to ensure the one you are looking for is displayed.
- Select the Portfolio (or Program) to be updated.

Name	Sponsor
2020 IT Portfolio	Albert Connell
Campus Upgrades	Connie Campaign
Customer Retention Portfolio 2022	Bob Banker
Engineering Portfolio	Jerry Colangelo
Environmental Initiative	Johnny Eager
Global Consumer Expansion	Bill Speker
Organization wide cloud migration	---
Sales Enablement	Bill Speker
Staff Retention and Recruitment	Diane Masters
Technical Infrastructure	Bob Banker

- Select the header.
- Select the **Sponsor**.



- 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

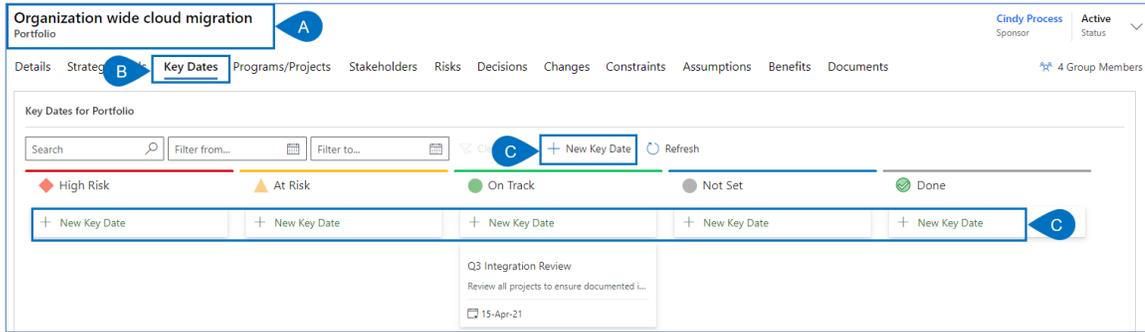
 **Portfolio/Program Manager**



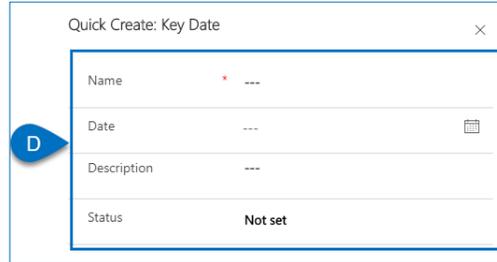
**Portfolio IQ – Portfolio (or Program) – Key Dates**

### 1. CAPTURE KEY DATES

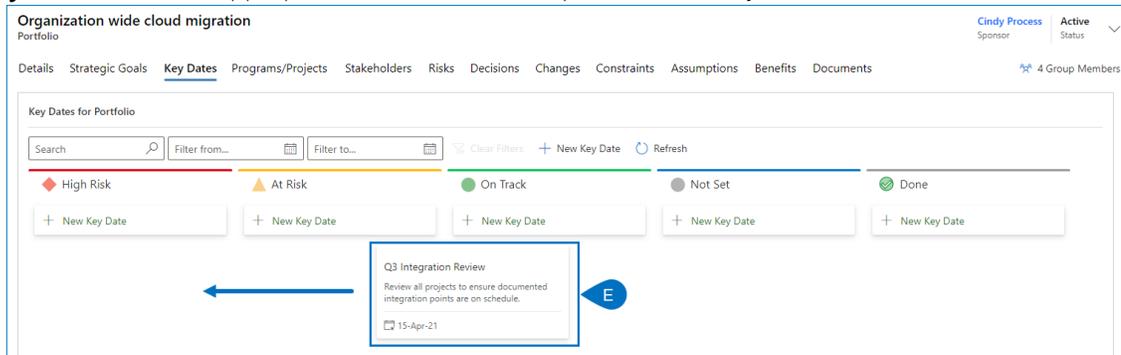
- a. Ensure you have the appropriate portfolio (or program) open in **Portfolio IQ**.
- b. Click the **Key Dates** tab.
- c. Click **+New Key Date**.



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.



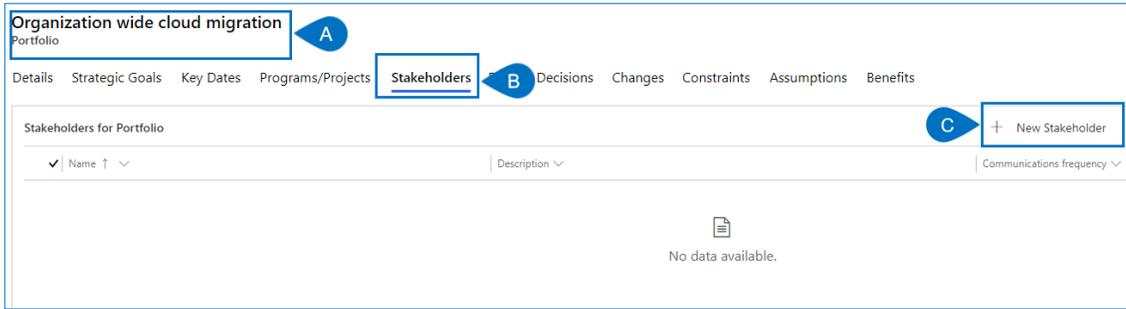
## Identifying Stakeholders

 **Portfolio/Program Manager**

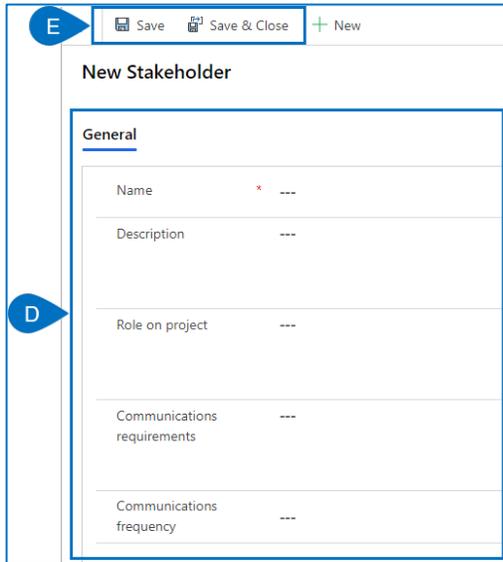
 **Portfolio IQ – Portfolio (or Program) – Stakeholders**

### 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**.



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

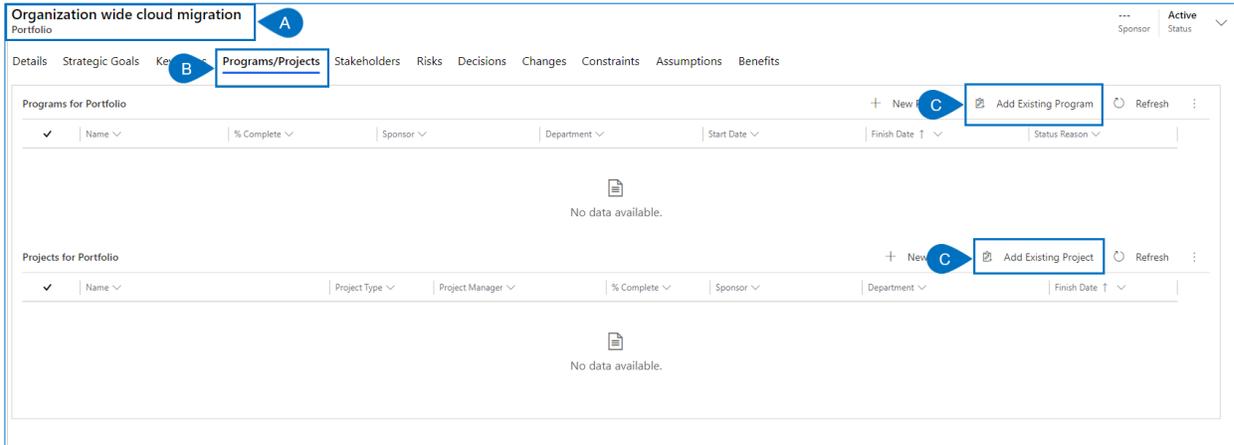


## Adding related programs/projects

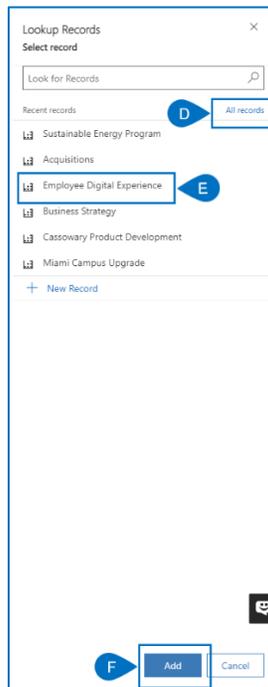
-  **Portfolio/Program Manager**
-  **Project IQ – Project Header**
- Portfolio IQ -Portfolio (or Program) – Programs/Projects**  
**Portfolio IQ – Program Header**

### 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)**.

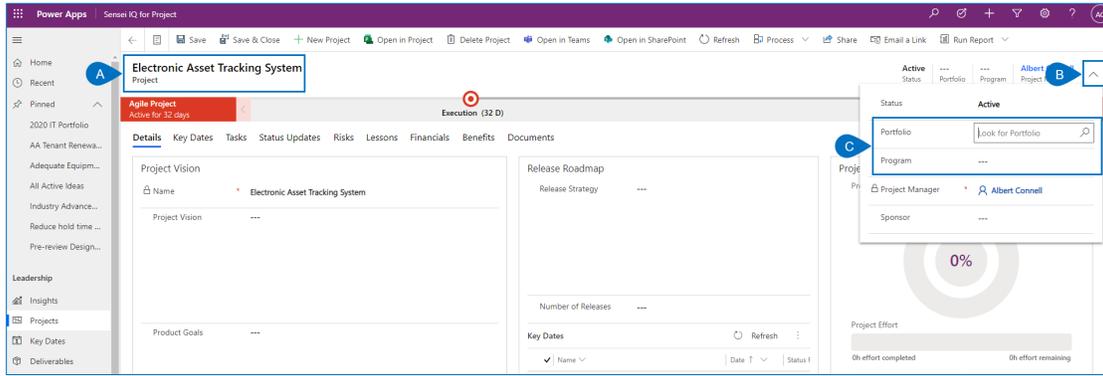


- d. Click **All records** if the record you are looking for is not shown.
- e. Select the appropriate **Program (or Project)**.
- f. Click **Add**.
- g. Click **Save & Close**.



## 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)**.



### 3. RELATE PROGRAMS TO A PORTFOLIO

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

