

## Overview

This Job Aid defines the three activities you may need to perform to maintain Portfolios or Programs.

## Changing the portfolio/program status

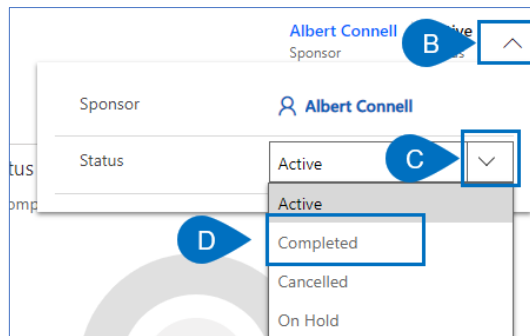


Portfolio/Program Manager



Portfolio IQ

- Open the Portfolio or Program.
- Select the **drop-down arrow** to open the Header.
- Select the drop-down for the status and select the **new status**.



## Manage support items associations

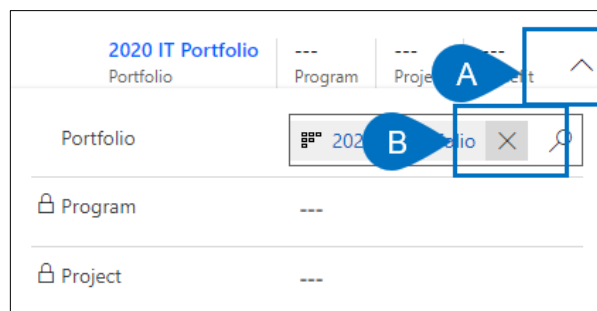


Portfolio/Program Manager

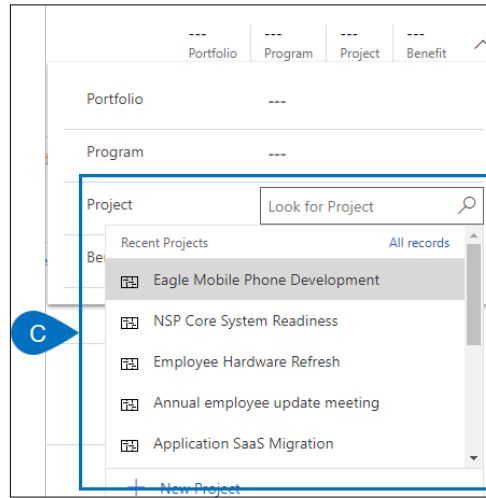


Portfolio IQ

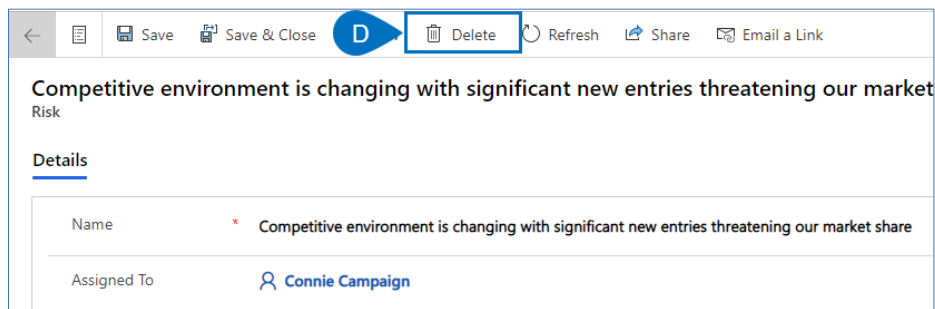
- For each support item (issue, risk, change request, etc.) you wish to change, open it in Sensei IQ and then click the **Header drop down** to open the **header**.
- A support item can be associated with at most a single project, program, or portfolio. Click **X** to remove the current association.



- c. Click the search icon to find the new project, program, or portfolio for the current item. Type the new portfolio, program, or project name, ensuring that the name is consistent with organizational standards and select the new association from the list.



- d. To delete a support item, open it in Sensei IQ and click **Delete** in the ribbon.



## Deleting a Portfolio/Program

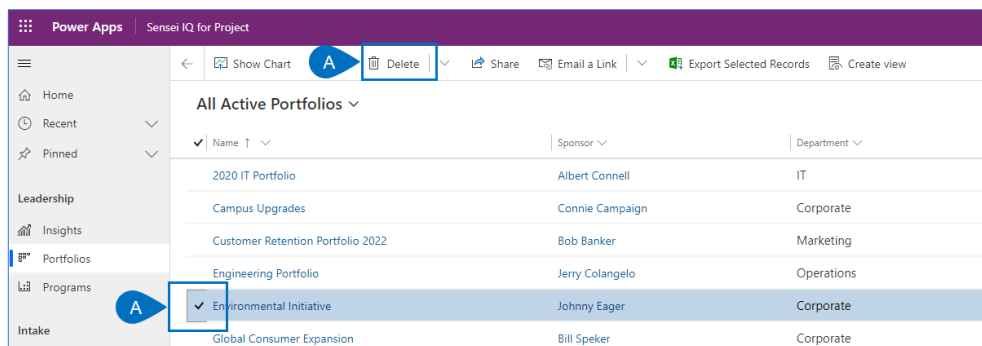


Portfolio/Program Manager

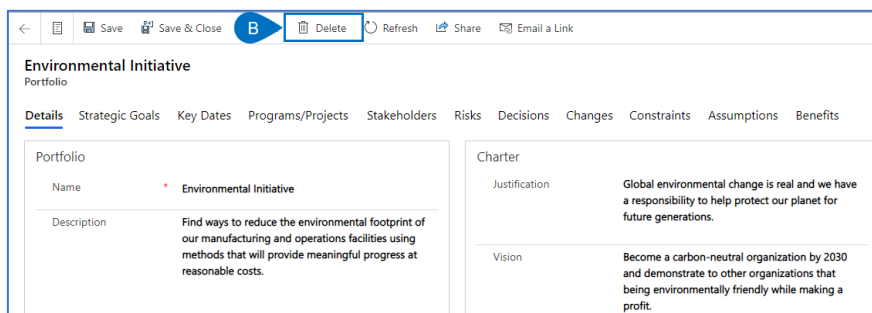


Portfolio IQ

- a. Select the portfolio/program from the list and click **Delete** from the ribbon. You should ensure that all support items have been associated with a different initiative or deleted prior to deleting the portfolio/program.



- b. Or open the portfolio/program in Portfolio IQ and select **Delete** from the ribbon.



The screenshot shows the Portfolio IQ application interface. At the top, there is a ribbon with several buttons: a back arrow, a document icon, 'Save', 'Save & Close', a blue button with a white 'B', 'Delete' (highlighted with a red box), 'Refresh', 'Share', and 'Email a Link'. Below the ribbon, the main content area is titled 'Environmental Initiative' and 'Portfolio'. A horizontal menu bar contains the following tabs: 'Details' (selected), 'Strategic Goals', 'Key Dates', 'Programs/Projects', 'Stakeholders', 'Risks', 'Decisions', 'Changes', 'Constraints', 'Assumptions', and 'Benefits'. The 'Details' tab is active, showing a form with two main sections: 'Portfolio' and 'Charter'. The 'Portfolio' section has two fields: 'Name' with the value 'Environmental Initiative' and a red asterisk, and 'Description' with the text 'Find ways to reduce the environmental footprint of our manufacturing and operations facilities using methods that will provide meaningful progress at reasonable costs.' The 'Charter' section has two fields: 'Justification' with the text 'Global environmental change is real and we have a responsibility to help protect our planet for future generations.' and 'Vision' with the text 'Become a carbon-neutral organization by 2030 and demonstrate to other organizations that being environmentally friendly while making a profit.'