Overview

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

Changing the portfolio/program status
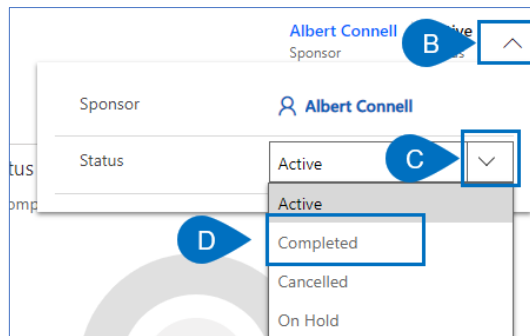
👤 **Portfolio/Program Manager** 🔧 **Portfolio IQ**

  a. Open the Portfolio or Program.
  b. Select the **drop-down arrow** to open the Header.
  c. Select the drop-down for the status and select the **new status**.
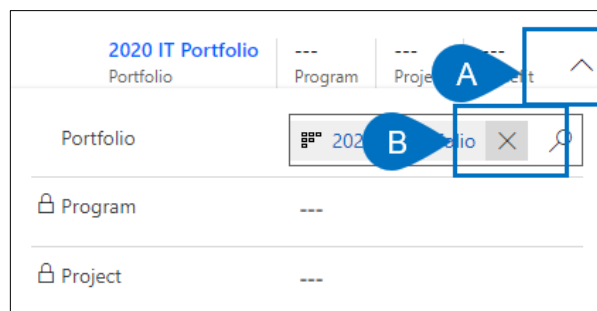
Manage support items associations

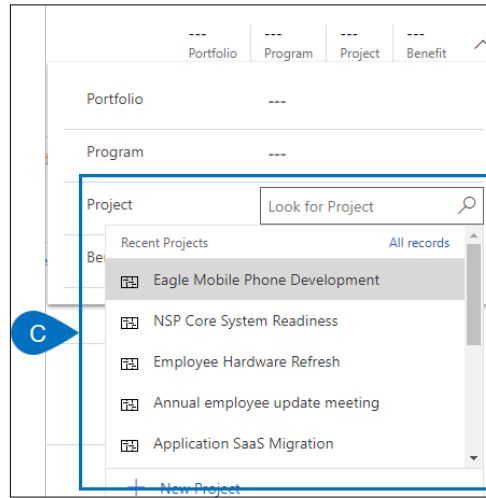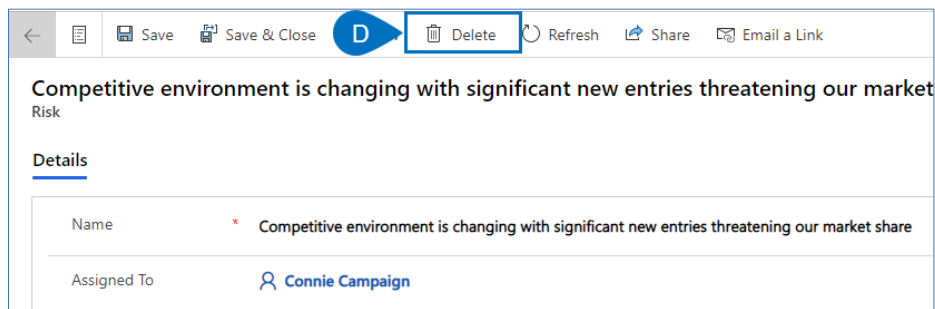👤 **Portfolio/Program Manager** 🔧 **Portfolio IQ**

  a. 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**.
  b. 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.
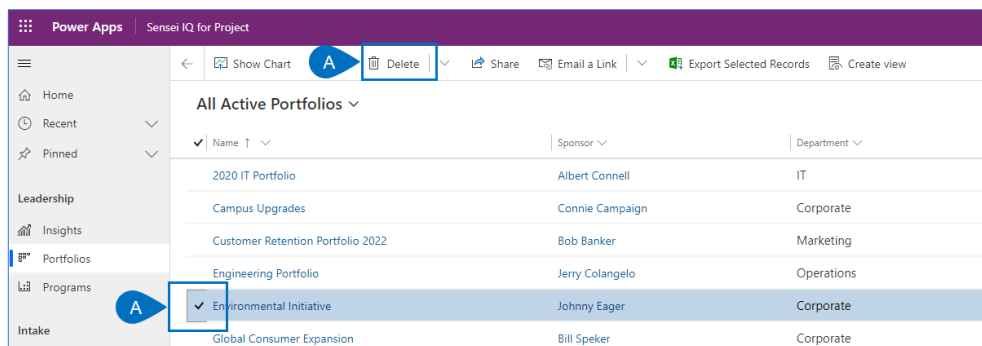

Deleting a Portfolio/Program
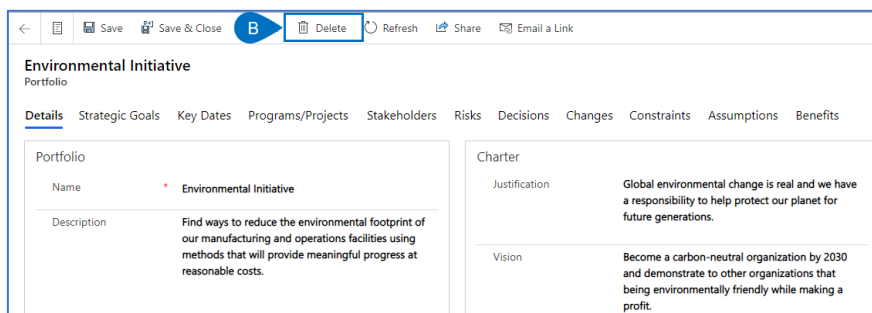
Portfolio/Program Manager   **Portfolio IQ**

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.