

Overview

This Job Aid defines the steps to follow for tracking progress on an active portfolio or program. This Job Aid is based on the assumption that a portfolio (or program), complete with the appropriate support details, has been created in Portfolio IQ and that programs and/or projects have been associated with it to deliver the results expected by the stakeholders.

The following are four (4) core actions required for understanding portfolio/program status. These are not sequential actions, and you may skip some based on your requirements.

- 1. Understanding progress
- 2. Validating key dates
- 3. Setting Program KPIs and composing status narratives
- 4. Adjusting the portfolio/program

Understanding progress

Portfolio / Program Manager

Portfolio IQ – Insights – Portfolio/Program Overview

1. REVIEW PORTFOLIO LEADERSHIP INSIGHTS REPORTS

a. Select the Portfolio (or Program) Overview report from Portfolio Leadership Insights.



- b. Right-mouse click on the appropriate Portfolio (or Program).
- c. Select **Drill-through Portfolio (or Program) Status.**





d. Review the **Overview** sub-page to understand the KPIs for all sub-programs and sub-projects and their impact on the Portfolio (or Program).

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Link	Sponsor		Location	Department		Effort	Direct Risks	Related Risks	s Reli	ated Issues		Budget			EAC	Actua	l Varian	ce
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			Justification		^			Scope							Res	ources Needed		^
This proje our o versi	portfolio re acts that wil core applica ons and su	presents I allow u ations an pport wi	a roadmap of thir s to capitalize the a s two to five revisio Il soon be ending u	ty small lifecycle IT associated labor. 7096 o ns behind current inless we get current.	ē ,	Upgrad applicat migrate monito	e all core applicat ions to virtual ser eligible applicatio ing system with e	ions to current v vers and retire a ons to SaaS; imp nhanced securit	versions; all old ser plement r ty contro	migrate on-pr ver hardware; iew Internet is; implement a	em a	Thes divisi be n appli	e effo ions. I eedeo ication	rts will req T Operatio d at 60%: B hs they use	uire pa ins will lusines are in	erticipation from all de be needed at 100%; s partners will be nee the process of being	epartments and IT development wi ded at 80% when updated or	Ţ
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	->	Heat av	areness poster				95		360	•	1	•	->			\$1,500	\$1,500	
() →	Custom	er Account Inquiry U	pgrade			95		2.320		⇒		⇒		⇒	\$20.500	\$20,500	Y

e. Review the **Details** sub-page to understand the status of all Portfolio (or Program) support items and their impact on the Portfolio (or Program).



f. Review the **Tracking** sub-page to understand the status of support items for all sub-programs and sub-projects and their impact on the Portfolio (or Program).

	s:			2020	0 IT Por	tfol	io		(j			g FINANCIA
Link Sponsor Location D	epartme	ent	Effort	Direct Risks	Related Risks	Related Is	sues	Bud	get EAC	Actua	d	Variance
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Sub Programs												
Program Issues					Program Risks				Pro	gram Changes		
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Account number format may have to chan.		18-Aug-20	-	Staffing for the pro	igram	Ø	30-Apr-20		15 potential projects for	r customer focus gr		30-Jun-2
Resource Constraint	0	10-Apr-20	Ó	New Hardware cou	uld be Required	Ø	10-Apr-20		Multi-Mobile Platform		ø	23-Aug-
🛱 Sub Projects												
Sub Projects Project Issues					Project Risks				Pr	oject Changes		
Projects Project Issues	Link	Due Date 🔺	KPI	Risk	Project Risks	Link	Due Date	∧ K	Pr Pl Change Request	oject Changes	Link	Due Date
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g. Review the **Financials** page to understand the overall financial picture of the Portfolio (or Program) based on the rollup of the financials from all the sub-projects.



- h. Return to the **Portfolio (or Program) Overview report** and right-mouse click on the appropriate Portfolio (or Program).
- i. Select **Drill-through Project Milestones.**

Environm	ental Initiative	Q
2020 IT P	Show as a table	Q
Total	Include	
	Exclude	
	Drill through 🕨	PORTFOLIO STATUS
	Сору 🕨	PROJECT MILESTONES

j. Review the **Sub Project Milestones** sub-page to understand the status of all the project milestones and their impact on the Portfolio (or Program).

	Completed Milestones			Milestones by Project
(PI Milestone	Finish	Project	Link 🔺	
Scope Complete	28-Oct-20	AA Tenant Renewal R300	6	Vendor On., 5
Project Start	05-Oct-20	AA Tenant Renewal R300	2	Dubrina Curren
Program definition complete	16-Jun-20	Driver awareness training refresh	6	
Design documents approved	15-Jun-20	Cassowary Mobile App	2	Driver ava
Creative agency hired	12-Jun-20	Heat awareness poster	9	73
Requirements complete	02-Jun-20	Driver awareness training refresh	0	
Draft preliminary designs complete	01+Jun+20	Cassowary Mobile App	9	
Handouts completed	18-May-20	Annual employee update meeting	9	Amual emplo.
Analysis Complete	04-May-20	Cassowary Mobile App	6	Cassowary Mobile
Application Requirements complete	04-May-20	Cassowary Mobile App	0 v	Necycling Improvement Project 11
🙈	** * **		~	
	Upcoming Milestones			Milestones by Project Manager
CPI Milestone	Target Finish	Project	Link 🔺	
Requirements complete	13-Apr-20	Dubrina Currency Exchange Upgrade	0	Connie Campaign
Posters reviewed	26-Jun-20	Heat awareness poster	2	Seb Baster
Build Complete	01-Jul-20	Dubrina Currency Exchange Upgrade	0	5
Deploy	01-Jul-20	Dubrina Currency Exchange Upgrade	9	
Deploy Complete	01-Jul-20	Dubrina Currency Exchange Upgrade	9	
Project Start	06-Jul-20	Vendor Onboarding	9	
Poster program complete	24+Jul+20	Heat awareness poster	9	Albert Con.
 Orientation complete 	31-Jul-20	Vendor Onboarding	е ,	
📥 Tast Complete	05-420	Dubéna Currance Rechanna Linorada	0	

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Validating key dates



Portfolio IQ – Key Dates tab Portfolio Leadership Insights



1. UPDATE KEY DATES

a. Open the **Key Dates** tab for the current portfolio (or program) and compare the approved dates to the current Leadership insights status report. If the approved Key Date is different than report, select the **pencil** icon (or double click the Key Date card).



- b. Update the **Date** to reflect the current report.
- c. Add any additional details in the **Description** field to better describe the new Key Date.
- d. Set the **Status** as appropriate based on how much the date has changed from the original expectation.

lew cou	irse outline					
🖬 Save	🛱 Save & Close	🗓 Delete	🖔 Refresh	🖻 Share	🕼 Email a Link	
New o	ourse outline					
Genera	l Related					
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De	scription	Course out	tline modified t	o be all inclus	sive C)
Sta	atus	At risk				
		Not set				
		On track				
		At risk				
		High risk				
		Done				

Setting Program KPIs and composing status narratives

👗 🛛 Program Manager

Portfolio IQ – Status Updates

1. SET KPIS AND RECORD STATUS NARRATIVE

a. Open the Status Updates tab for the current program and click + New Status Update.

Business Strategy Program						
Global Consumer Expansion Portfolio	Connie Campaign Sponsor	n Active Status	\checkmark			
De Strategic Key	. Proj Sta	itus U	Stakeh Is	s	ትድ Group	Memb
Status Updates for Program			A	+ New Sta	itus Update	:
✓ Status ↓ ∨ Proje	ct KPI 🗸 Delivera	ble $\lor $ Scher	dule KPI 🗸 Fina	ncials 🗸	Work KPI 🗸	Issue
25-Apr-20	On Tr 🔍 Or	n Tr 🛛 🔍	On Tr 🛛 🔍	On Tr	On Tr	•



- b. Create a **new program status update** for the current period. Ensure the **Status Date** is set to reflect the status period end date.
- c. Define the **overall program status**. Set the **Program KPI** and provide a clear and concise narrative to describe the current status of the program.

New	Status Updat	te		
KPI Sta	itus			
Gene	eral			
B St	atus Date	* 12-Jun-20		
⊖ cr	eated By			
A cr	eated On			
Proje	ect			
Pr	oject KPI	On Track	On Watch	Troubled
C Pr	oject Status			

d. Set **the KPI and provide a status narrative** for the other relevant status areas based on your stakeholders' information requirements.

New Status Update	8				AA Tonant Renewa Program Project
KPI Status					
General		Schedule		Issues	
Status Date	* 12-Jun-20	Schedule KPI	On Track On Watch Troubled	Issues KPI	On Track On Watch Traue
🗄 Created By		Schedule Status		Issues Status	
🗄 Created On					
Project		Financials		Risks	
Project I/PI	On Tank On Wetch Treated	Financials KPI	On Track On Watch Troubled	Ripks KPI	On Track On Watch Trout
Project Status	The project is fally staffed and entering the next phase on schedule.	Financials Status		Ricks Status	***
Deliverables		Work		Change Requests	
Deliverables KPI	On lock On Weth Insubled	Work KPI	On Track On Watch Troubled	Change Requests KPI	On linek On Welch I tou
Deliverables Status		Work Status		Change Requests Status	
L					

Adjusting the portfolio / program

Portfolio / Program Manager

Portfolio IQ – Programs/Projects tab

1. ADD A NEW SUPPORTING PROGRAM OR PROJECT

- a. Select the **Programs/Projects tab**.
- b. Select Add Existing Program or Add Existing Project as appropriate.

2020 Portfolio	T Portfolio										Albert Sponsor
Details	Strategic G	als KA	Programs/Projects	Stakeholders R	isks Decisions	Changes Constra	ints Assumptions	Benefits	Documents		
Progra	ams for Portfoli									+ New B	创 Add Existing Program
~	Name 🗸		$\%$ Complete \backsim	Sponsor \	/	Department \lor	Sta	rt Date \checkmark		Finish Date $\uparrow~~\lor$	Status Reason ∨
	A Cassow	ry Product Developm	ner 📃	Fred Sam	ple	Marketing	29	-Mar-20		30-Dec-20	Active
	🔺 Coffee I	nprovement Program	1 1	Bob Mel	in	Operations	31	-Mar-20		28-Jan-21	Active
Projec	ts for Portfolio									+ NB.ct	🖄 Add Existing Project
~	Name 🗸			Project Type \lor	Project Manager \lor	%	Complete \lor S	ponsor \vee		Department \lor	Finish Date ↑
	Annual	employee update me	eting	Major Project	Chris Thomas		J	erry Colangelo		Corporate	18-Aug-20



c. Search for and select the appropriate program (or project) from the list.



2. REMOVE A SUPPORTING PROGRAM OR PROJECT

- a. Select the **Program/Project tab.**
- b. Select the **Program** (or Project) you wish to delete from the list.

2020 IT Portfolio	T Portfolio					
Details	Strategic Goals Ke	A Programs/Project	s Stakeholders R	isks Decisions	Changes Constraints	Assumptions Benefits Docume
Program	ms for Portfolio					
~	Name 🗸	% Complete \vee	Sponsor 🗸		Department \lor	Start Date \lor
	A Cassowary Product D	evelopmen	Fred Sam	ple	Marketing	29-Mar-20
	A Coffee Improvement	Program	Bob Melv	in	Operations	31-Mar-20
Projects	s for Portfolio					
~	Name 🗸		Project Type 🗸	Project Manager 🛇	 % Completion 	ete 🗸 🔰 Sponsor 🗸
в	Annual employee up	date meeting	Major Project	Chris Thomas		Jerry Colangelo
	Driver awareness trai	ning refresh	Major Project	Connie Campaig	jn 📃	Bob Brenly
	Recycling Improvement	ent Project	Major Project	Chris Thomas		Bob Melvin

- c. After confirming this is the correct record, select the **header drop down.**
- d. Click **X** to remove the association to a Portfolio (or Program).

Active Status	2020 IT Portfolio Portfolio		 Program	Chri Proje C	s _
Statu	s	,	Active		
Portfo	olio D		📲 2020 IT	Portfolio 🗙	٦
A Prog	ram				
🔒 Proje	ct Manager *		久 Chris Th	omas	
Spon	sor		႙ Jerry Co	blangelo	