

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.

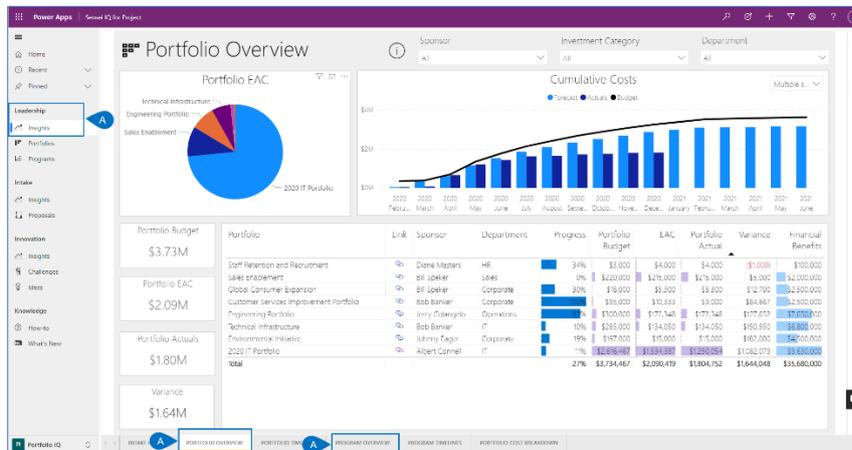
1. Understanding progress
2. Validating key dates
3. Setting Program KPIs and composing status narratives
4. Adjusting the portfolio/program

Understanding progress

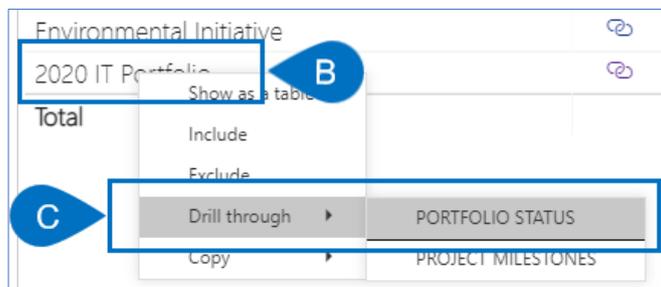
 **Portfolio / Program Manager**  **Portfolio IQ – Insights – Portfolio/Program Overview**

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).

Link	Sponsor	Location	Department	Effort	Direct Risks	Related Risks	Related Issues	Budget	EAC	Actual	Variance
	Albert Cornell	Phoenix, AZ	IT	27,040	4	26	28	\$2,616,467	\$1,934,387	\$1,250,054	\$1,082,079

KPI	Program	Link	Effort (Hours)	Deliverables	Schedule	Financials	Program Budget	Variance
	Casovary Product Development		18,784				\$2,558,667	\$1,051,379
	Coffee Improvement Program		360				\$1,500	\$1,500

KPI	Project Name	Link	Effort (hours)	Deliverables	Schedule	Financials	Project Budget	Variance
	AA Tenant Renewal R300		937				\$1,818,887	\$888,633
	Central Ave Local Business Survey		992				\$4,000	\$4,000
	Senior awareness training refresh		2,208				\$7,000	\$7,000
	Vendor Onboarding		2,120				\$5,300	\$5,300
	Heat awareness poster		360				\$1,500	\$1,500
	Customer Account Inquiry Upgrade		2,320				\$20,500	\$20,500

- 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).

Link	Sponsor	Location	Department	Effort	Direct Risks	Related Risks	Related Issues	Budget	EAC	Actual	Variance
	Albert Cornell	Phoenix, AZ	IT	27,040	4	26	28	\$2,616,467	\$1,934,387	\$1,250,054	\$1,082,079

KPI	Key Date	Link	Date
	Marketing Alignment		18-Mar-20
	Market strategy alignment		01-Apr-20
	Currency Exchange Capability Available		15-May-20
	Annual Employee Meeting held		24-Jun-20
	Q3 Review		30-Jun-20
	Financial trueup		14-Aug-20
	Realized Revenue		31-Aug-20
	Employee Survey		25-Sep-20

KPI	Risk	Link	Due Date
	Competitive environment is changing w...		20-Mar-20
	Pending merger may change corporate...		17-Apr-20
	Staff availability		27-Mar-20
	Worldwide economic downturn		31-Jul-20

KPI	Change Request	Link	Due Date
	Increase Size of Data Center		17-Aug-20
	Marketing Deliverable Date		30-Nov-20

KPI	Decision	Link	Due Date
	Backup data centers in each region		18-Sep-20
	Portfolio Executive Staff Updates		17-Aug-20
	Outsourcing Development for Infrared Se...		10-Mar-21
	Buy or Build		30-Nov-20
	PMO Oversight Management		17-Aug-20
	Work to proceed as planned: merger will ...		02-Mar-20

Constraint	Link
Approved Portfolio Costs	
Business Unit availability for testing	
Changes must be completed by end of August	
Deliverable acceptance process	
Executive Management reorganization	
Must support at least 3 prior generations of smart phones	
No impact to operations during implementation and cutover	
System down time	

Assumption	Link
Amount of data required will not impact the speed of the a...	
Cut over testing to take place in July	
Database can be upgraded in hot mode with no impact to ...	
Learning curve for new technology will be moderate	
Project staffing requirements will be satisfied	
Stakeholder Engagement	

- 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).

Link	Sponsor	Location	Department	Effort	Direct Risks	Related Risks	Related Issues	Budget	EAC	Actual	Variance
	Albert Cornell	Phoenix, AZ	IT	27,040	4	26	28	\$2,616,467	\$1,934,387	\$1,250,054	\$1,082,079

KPI	Issue	Link	Due Date
	Account number format may have to chan...		18-Aug-20
	Resource Constraint		18-Apr-20
	Beans are Slightly Larger than Previous Bie...		15-Apr-20

KPI	Risk	Link	Due Date
	Staffing for the program		30-Apr-20
	New Hardware could be Required		10-Apr-20

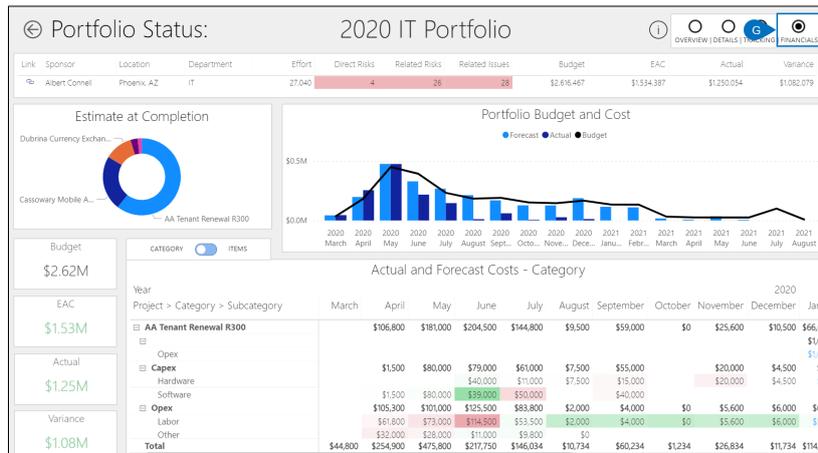
KPI	Change Request	Link	Due Date
	15 potential projects for customer focus gr...		30-Jun-20
	Multi-Mobile Platform		23-Aug-20
	Drip Filters should be distributed to all loc...		18-Apr-20

KPI	Issue	Link	Due Date
	Account number format may have to chan...		18-Aug-20
	Coding tasks underestimated		15-Jul-20
	Competition is actively deploying new pr...		30-Jul-20
	Customer needs are unclear		14-Jul-20
	Deployment Logistics tasks underestimated		25-Jun-20
	Equipment Backorder		10-Aug-20

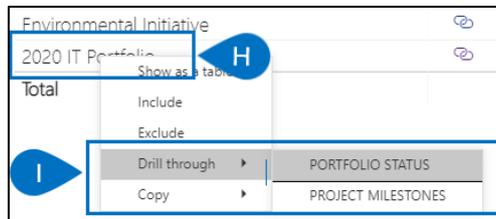
KPI	Risk	Link	Due Date
	Additional Funding not available		29-Sep-20
	Additional Scope		26-Jul-20
	Backup data center may not be operatio...		05-Jan-21
	Detailed Hardware Design may be delay...		19-Jul-20
	Exchange Rates vary daily		13-Jul-20
	Executive Staff may become disengaged...		25-Jun-20

KPI	Change Request	Link	Due Date
	Add a "test" instance to existing setup		28-Jul-20
	Add Checkpoint field locking to Backup		17-Jul-20
	Add new feature to extract data records...		15-Jan-20
	Add support for Access databases in ad...		24-Jul-20
	Additional Budget		15-Jul-20
	Allow app to auto switch between vertic...		20-Aug-20

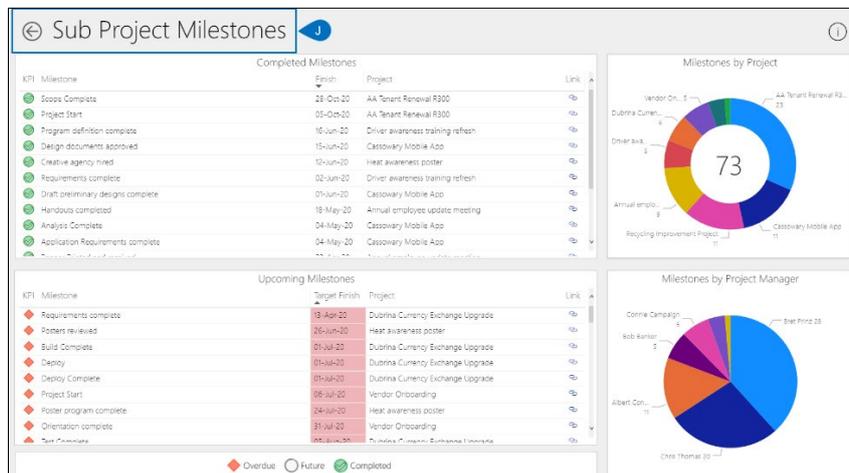
- g. Review the **Financials** page to understand the overall financial picture of the Portfolio (or Program) based on the rollup of the financials from all the sub-projects.



- 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**.



- 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).



Validating key dates

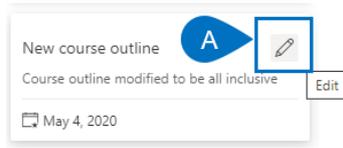
Portfolio / Program Manager



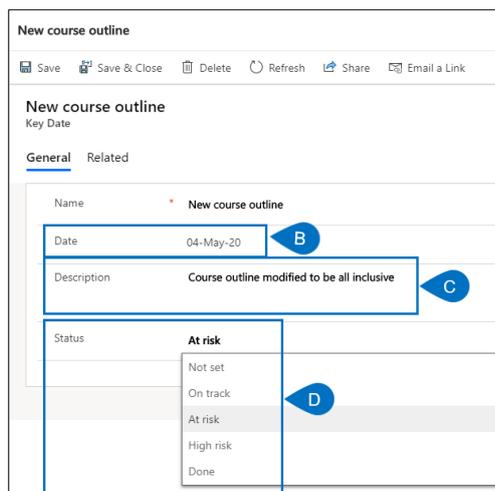
Portfolio IQ – Key Dates tab
Portfolio Leadership Insights

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.



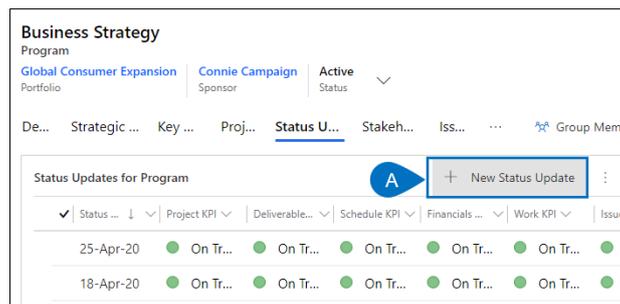
Setting Program KPIs and composing status narratives

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**.



- 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.

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

Adjusting the portfolio / program

Portfolio / Program Manager

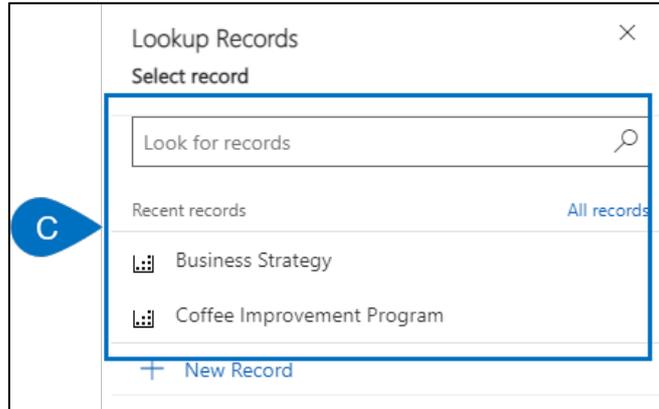
Portfolio IQ – Programs/Projects tab

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.

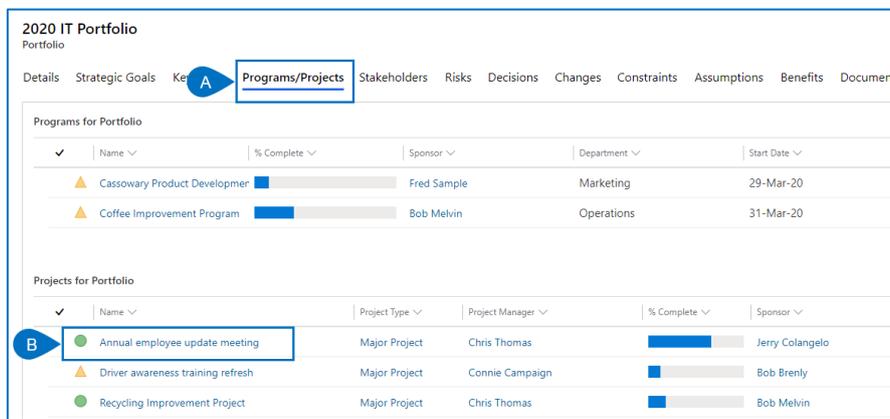
2020 IT Portfolio							
Portfolio							
Details Strategic Goals KPI A Programs/Projects Stakeholders Risks Decisions Changes Constraints Assumptions Benefits Documents							
Programs for Portfolio + New B Add Existing Program							
✓	Name	% Complete	Sponsor	Department	Start Date	Finish Date	Status Reason
▲	Cassowary Product Developer	<div style="width: 50%;"></div>	Fred Sample	Marketing	29-Mar-20	30-Dec-20	Active
▲	Coffee Improvement Program	<div style="width: 100%;"></div>	Bob Melvin	Operations	31-Mar-20	28-Jan-21	Active
Projects for Portfolio + New B Add Existing Project							
✓	Name	Project Type	Project Manager	% Complete	Sponsor	Department	Finish Date
●	Annual employee update meeting	Major Project	Chris Thomas	<div style="width: 100%;"></div>	Jerry 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.



- 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).

