

Overview

This Job Aid defines the steps to follow for collaborating on portfolio and program support items, such as issues, risks, decisions, changes, constraints, assumptions, lessons learned, and documents, in the platform.

Based on organisational policies and your specific requirements, you may not use all these support items on your portfolio or program.

There are eight (8) collaboration components available to help you deliver your portfolios and programs, and each is addressed here.

1. Managing issues
2. Managing risks
3. Tracking decisions
4. Recording and managing change requests
5. Documenting constraints
6. Capturing assumptions
7. Capturing lessons learned
8. Managing documents

Except for managing project documents, the components function similarly and if you are comfortable with one, you may not need to review the other components of this document.

Managing issues



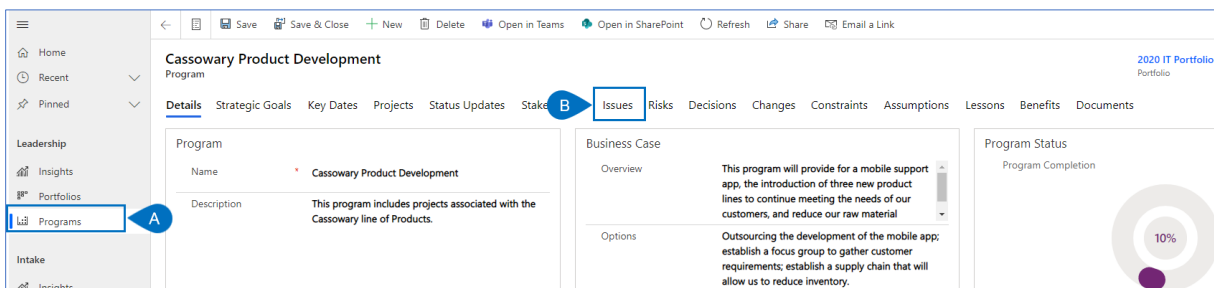
Program Manager



Portfolios – Issues tab

1. CREATE AN ISSUE

- a. Ensure you have the appropriate program open in **Portfolios**.
- b. Click the **Issues** tab.



- c. Click + **New Issue**.

Issues for Program

C + New Issue Refresh :

✓ Name ▾	Assigned To ▾	Status Reason ▾	Priority ▾	Category ▾	Due D... ↑ ▾
Resource Constraint	Kenneth Steiness	Closed	↑ High	Resource	10-Ap...
Account number format may have to change	Resource Constraint	Active	↑ High	Schedule	18-Au...
Environmental regulations recently changed, an	Bob Banker	Active	↑ High	Scope	30-Au...

- Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the issue in screens, reports, and dashboards.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Issue

D Name * ---

Assigned To ---

Status **Active**

Category ---

Priority **Medium**

E Due Date ---

Description ---

Resolution ---

F Save and Close Cancel

2. UPDATE ISSUES

- Ensure you have the appropriate program open in **Portfolios**.
- Click the **Issues** tab.

2020 IT Portfolio

Cassowary Product Development Program

A Programs B Issues Risks Decisions Changes Constraints Assumptions Lessons Benefits Documents

Program

Name * Cassowary Product Development

Description This program includes projects associated with the Cassowary line of Products.

Business Case

Overview This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material

Options Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.

Program Status

Program Completion

10%

- Click on the **Issue** to be updated from the list.

Name	Assigned To	Status	Reason	Priority	Category	Due Date
Resource Constraint	Kenneth Steiness	Active		High	Resource	10-Apr-20
Account number format may have to change due to privacy issues	Nate Auchter	Active		High	Schedule	18-Aug-20

- Update any field, as required.
- Click **Save & Close**.

Account number format may have to change due to privacy issues

Details

Name	Account number format may have to change due to privacy issues		
Assigned To	Nate Auchter		
Status	Active		
Category	Schedule		
Priority	<div>High</div> <div>Medium</div> <div>Low</div>		
Due Date	18-Aug-20		

Description

The account number currently has 4 characters of the customer's last name, privacy concerns suggest the account number should have no identifying information

Update - NA - Dec 5, the privacy officer will confirm, but they believe this is not enough to cause privacy concerns as no one can be uniquely identified by 4 characters of a last name.

Resolution

Managing risks



Portfolio/Program Manager



Portfolios – Risks tab

1. CREATE A RISK

- Ensure you have the appropriate portfolio or program open in **Portfolios**.
- Click the **Risks** tab.

Cassowary Product Development

Details Strategic Goals Key Dates Projects Status Updates Stakeholders **Risks** Decisions Changes Constraints Assumptions Lessons Benefits Documents

Program

Name: Cassowary Product Development

Description: This program includes projects associated with the Cassowary line of Products.

Business Case

Overview: This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material

Options: Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.

Program Status

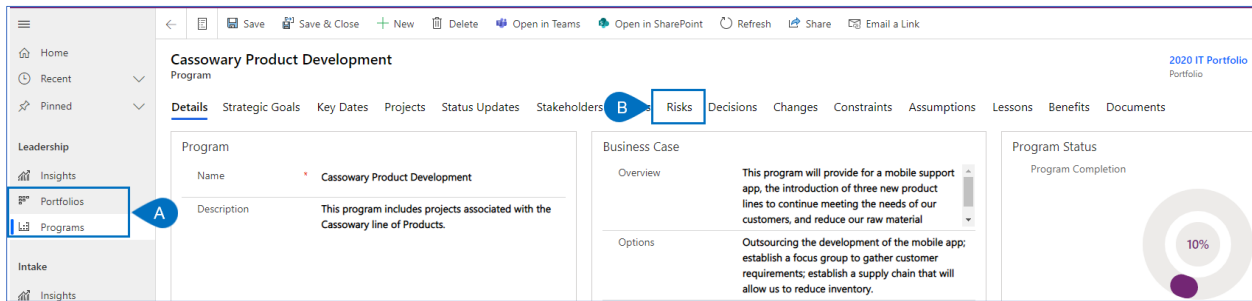
Program Completion: 10%

- Click **+ New Risk**.

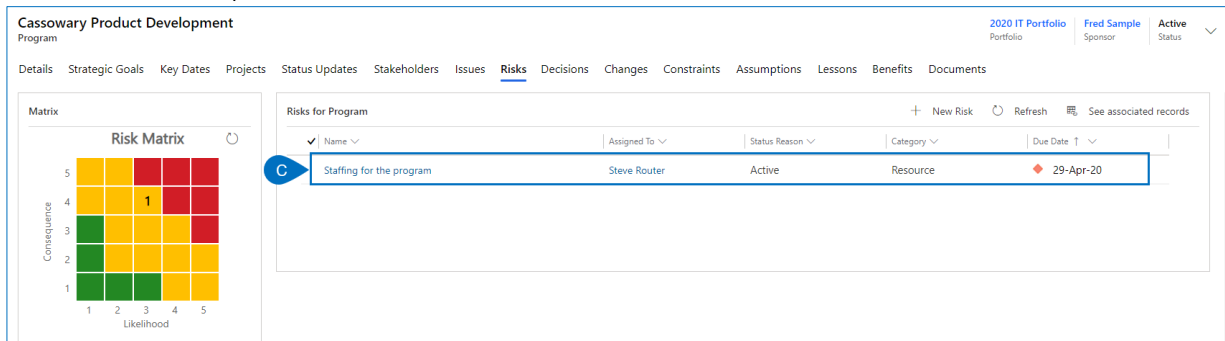
- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the risk in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

2. UPDATE RISKS

- a. Ensure you have the appropriate portfolio or program open in **Portfolios**.
- b. Click the **Risks** tab.

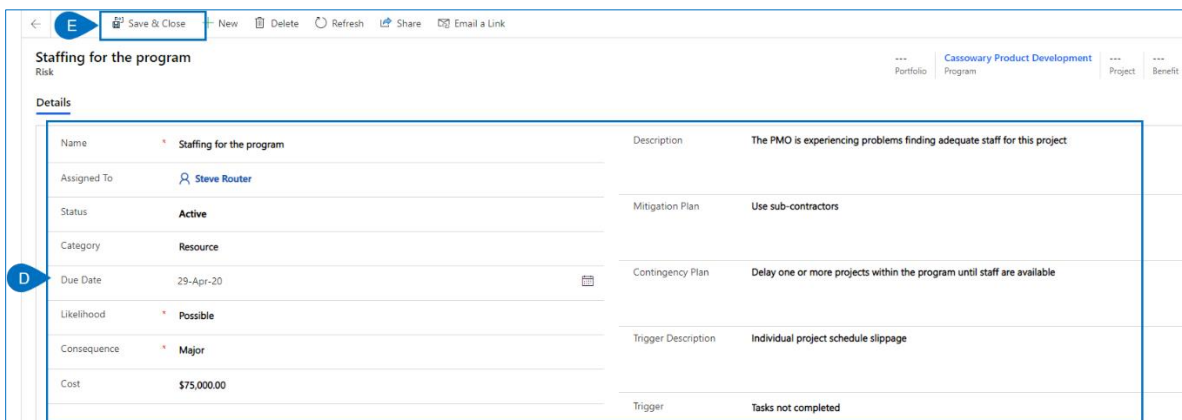


c. Click on the **Risk** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



Tracking decisions



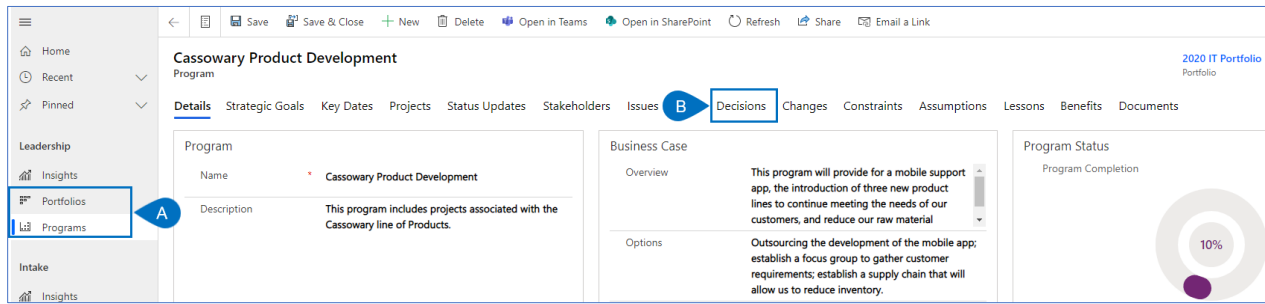
Portfolio/Program Manager



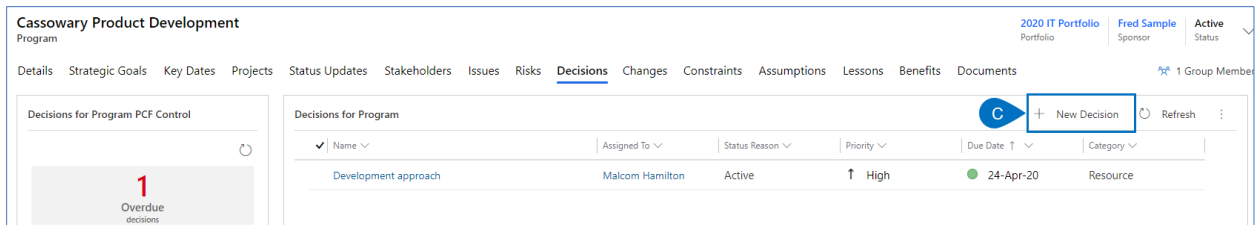
Portfolios – Decisions tab

1. CREATE NEW DECISION

- Ensure you have the appropriate portfolio or program open in **Portfolios**.
- Click the **Decisions** tab.



c. Click **+ New Decision**.



- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the decision in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

Quick Create: Decision

D

Name

Description

Status

Active

Priority

Medium

Due Date

E

Category

Escalation Required

No

Escalation Manager

Decision Date

Approver

Assigned To

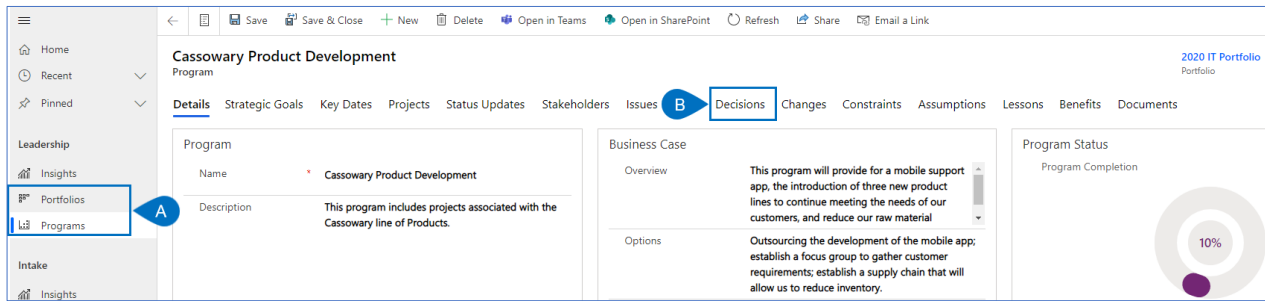
F

Save and Close

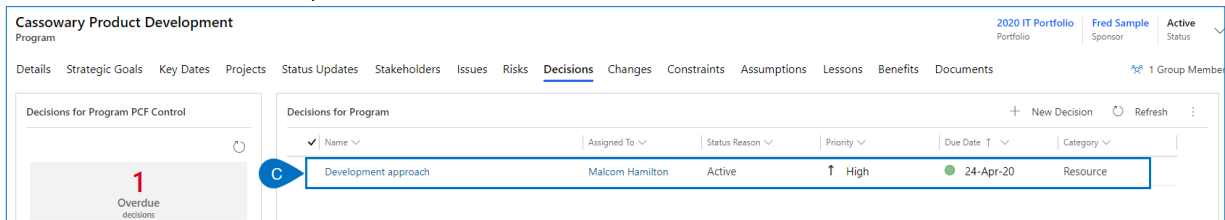
Cancel

2. UPDATE DECISIONS

- a. Ensure you have the appropriate portfolio or program open in **Portfolios**.
- b. Click the **Decisions** tab.

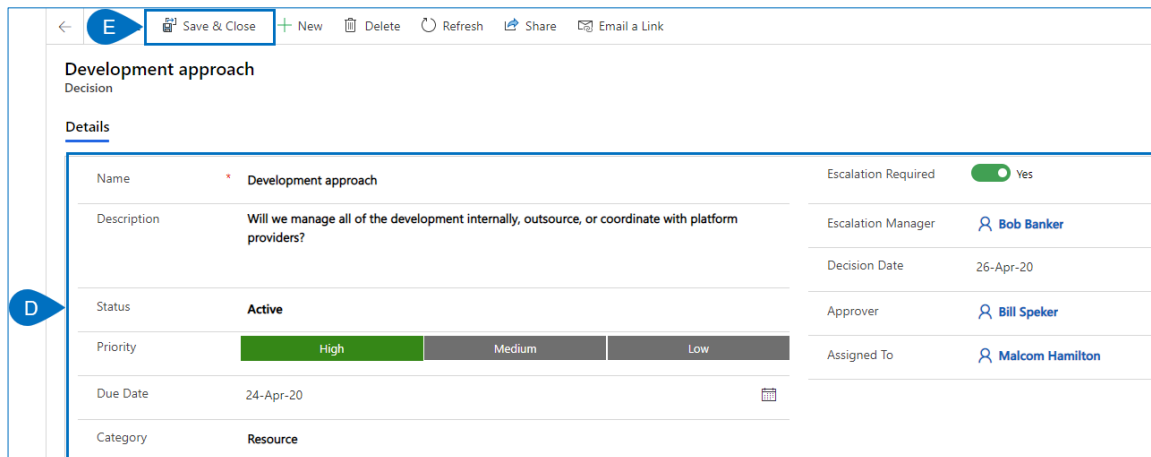


c. Click on the **Decision** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



Recording and managing change requests



Portfolio/Program Manager

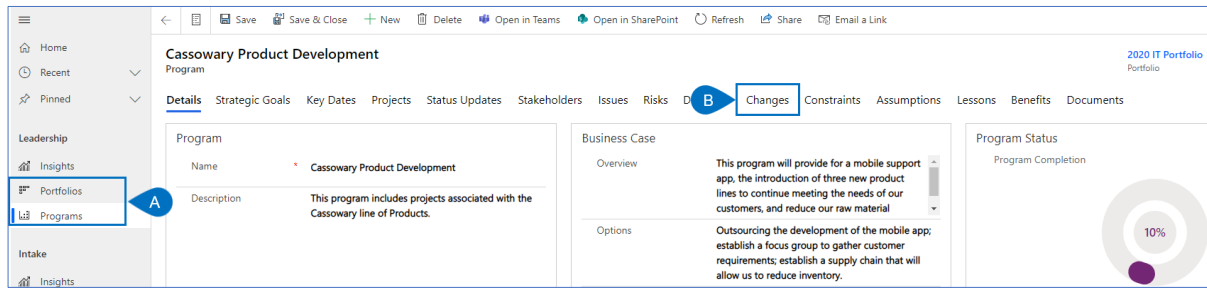


Portfolios – Changes tab

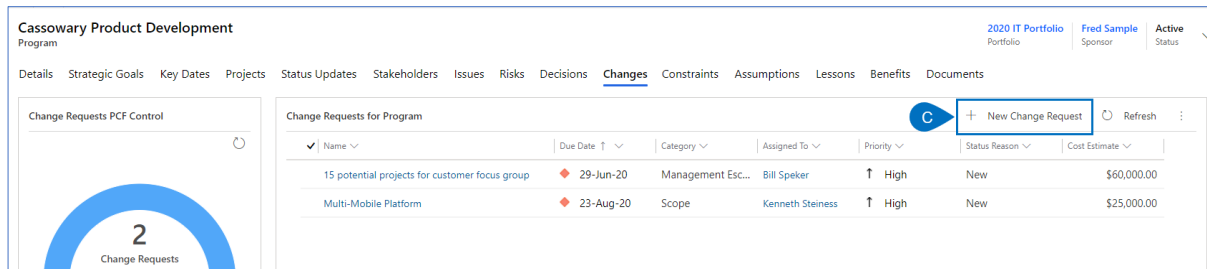
1. CREATE NEW CHANGE REQUEST

a. Ensure you have the appropriate portfolio or program open in **Portfolios**.

b. Click the **Changes** tab.



c. Click + New Change Request.



- Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the change request in screens, reports, and dashboards.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Change Request

D

Name

Description

Driven By

Implementation Date

Category

Priority

Assigned To

Work Effort Estimate

Work Effort Details

Cost Estimate

Cost Estimate Details

Duration Estimate

Duration Estimate Details

Resource Impacts

Impact on Other Projects

Assumptions

Approved / Rejected By

E

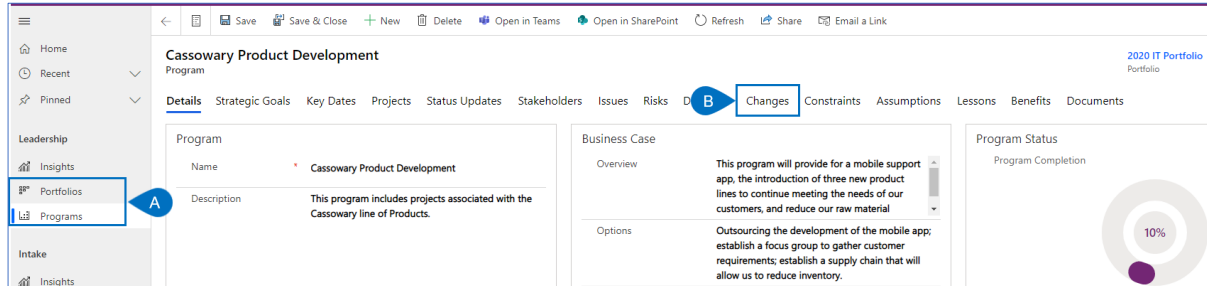
F

Save and Close

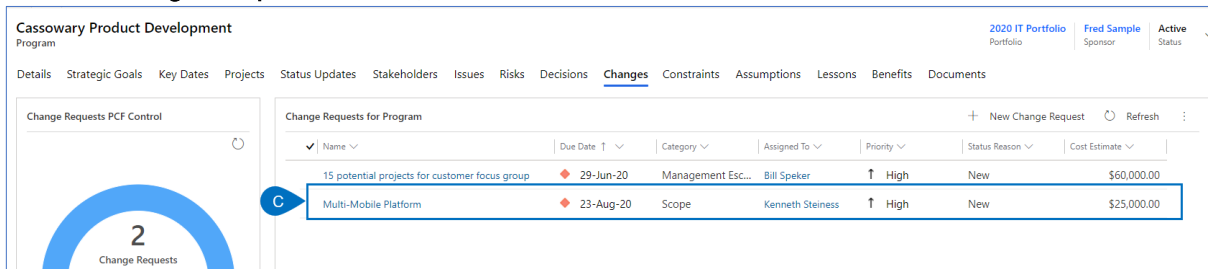
Cancel

2. UPDATE CHANGE REQUESTS

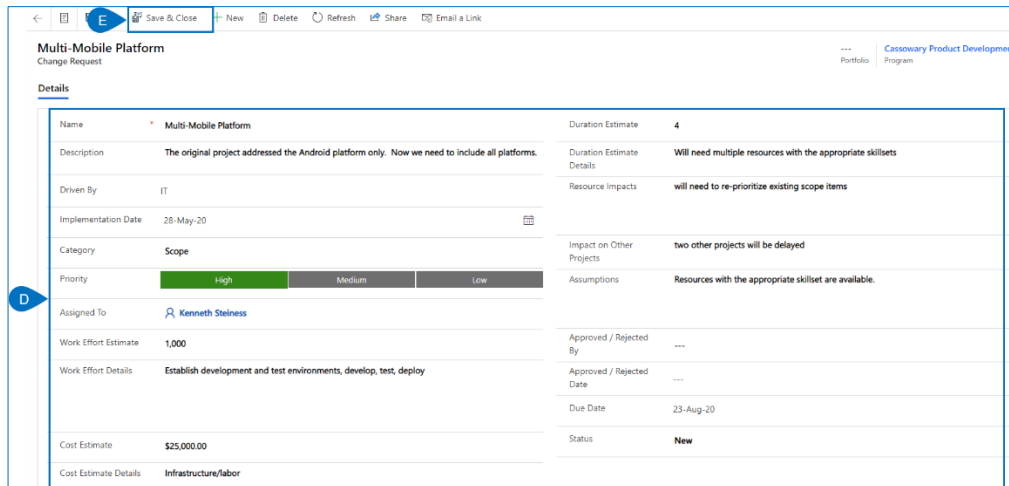
- Ensure you have the appropriate portfolio or program open in **Portfolios**.
- Click the **Changes** tab.



- Click on the **Change Request** to be updated from the list.



- Update any field, as required.
- Click **Save & Close**.



Documenting constraints



Portfolio/Program Manager

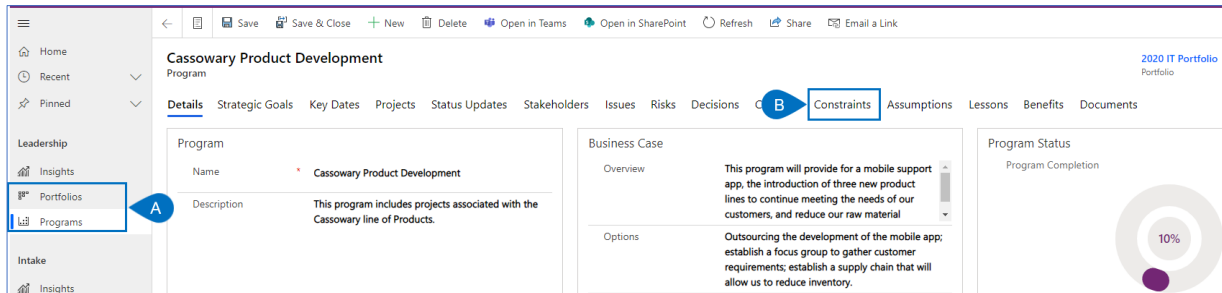


Portfolios – Constraints tab

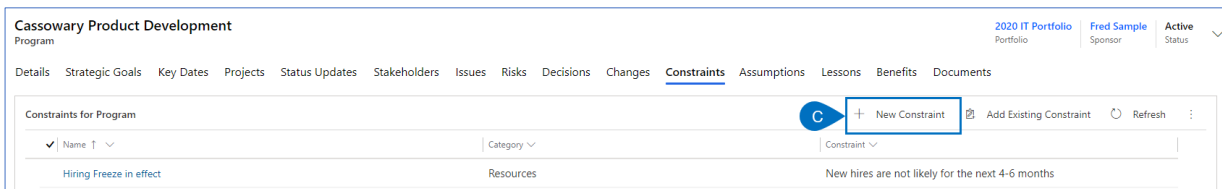
1. CREATE NEW CONSTRAINT

- Ensure you have the appropriate portfolio or program open in **Portfolios**.

- b. Click the **Constraints** tab.



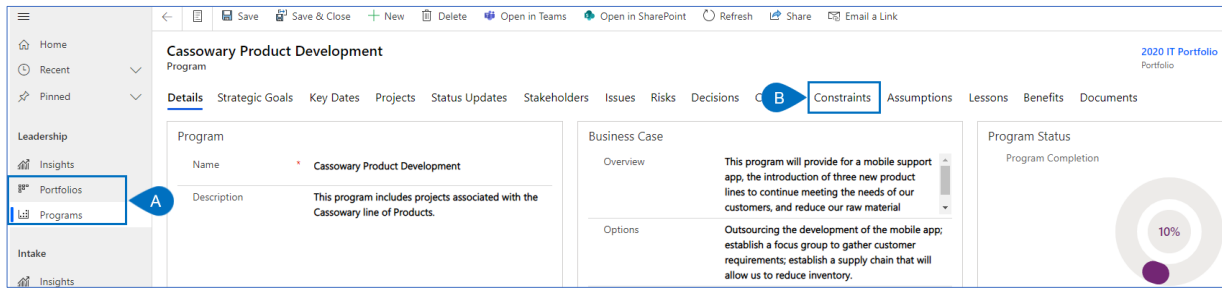
- c. Click **+ New Constraint**.



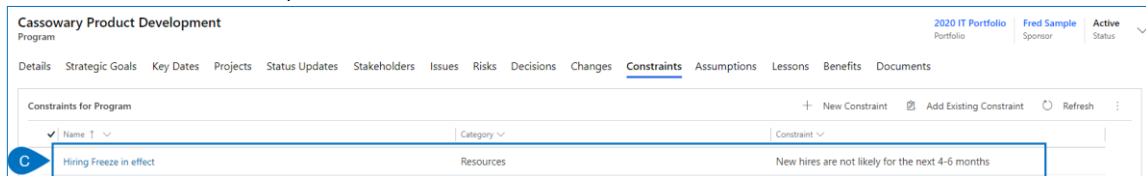
- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the constraint in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

2. UPDATE CONSTRAINTS

- a. Ensure you have the appropriate portfolio or program open in **Portfolios**.
- b. Click the **Constraints** tab.

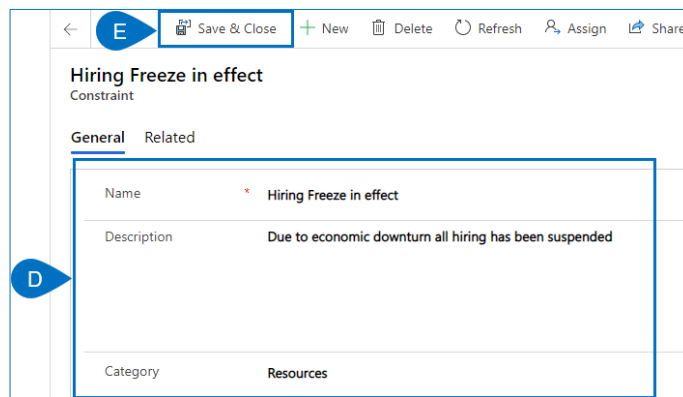


c. Click on the **Constraint** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



Capturing assumptions



Portfolio/Program Manager

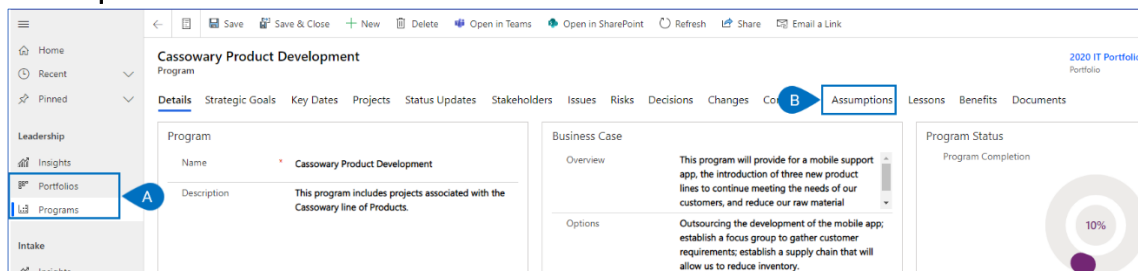


Portfolios – Assumptions tab

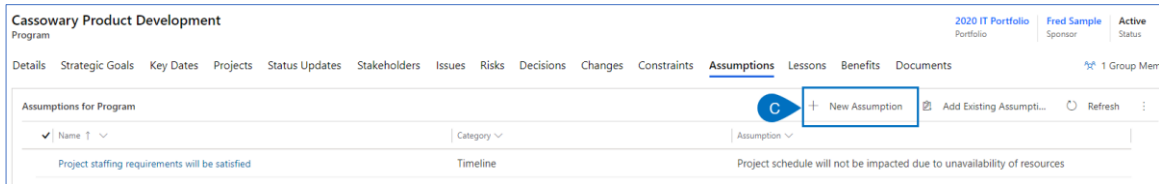
1. CREATE NEW ASSUMPTION

a. Ensure you have the appropriate portfolio or program open in **Portfolios**.

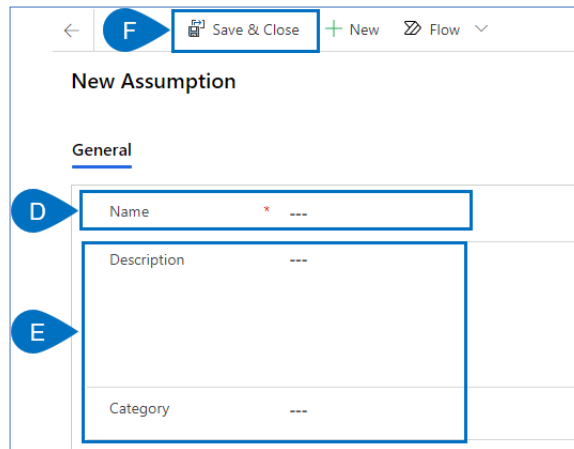
b. Click the **Assumptions** tab.



- c. Click **+ New Assumption**.

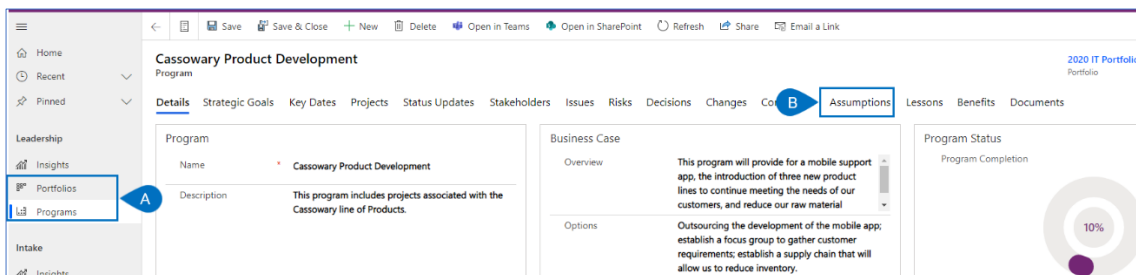


- d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the assumption in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

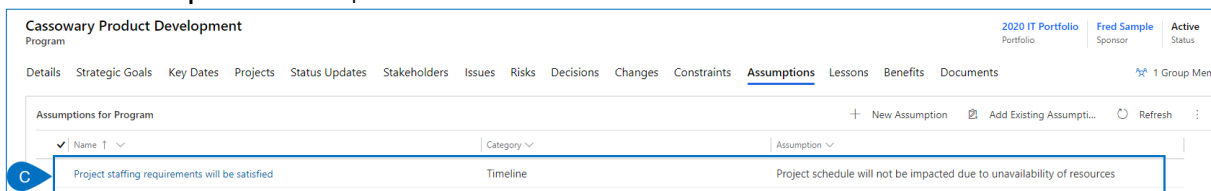


2. UPDATE ASSUMPTIONS

- a. Ensure you have the appropriate portfolio or program open in **Portfolios**.
- b. Click the **Assumptions** tab.



- c. Click on the **Assumption** to be updated from the list.



- d. Update any field, as required.
- e. Click **Save & Close**.

Capturing lessons learned



Program Manager



Portfolios – Lessons tab

1. CREATE NEW LESSON LEARNED

- Ensure you have the appropriate program open in **Portfolios**.
- Click the **Lessons** tab.

- Click **+ New Lesson Learned**.

- Fill in the Name field. It is mandatory and should be clear and concise to help users identify the lesson learned in screens, reports, and dashboards.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Lesson Learned

D Name * ---

Category ---

Status **Active**

E Observation ---

Recommendation ---

Lesson Learned ---

Action Taken ---

F Save and Close Cancel

2. UPDATE LESSONS LEARNED

- Ensure you have the appropriate portfolio or program open in **Portfolios**.
- Click the **Lessons** tab.

The screenshot shows the 'Cassowary Product Development' program page. The 'Lessons' tab is highlighted with a blue box and labeled 'B'. The 'Portfolios' menu item is highlighted with a blue box and labeled 'A'.

- Click on the **Lesson Learned** to be updated from the list.

The screenshot shows the 'Lessons Learned for Program' section. A table lists lessons learned, with the first row highlighted by a blue box and labeled 'C'.

Name	Created By	Category
Open lines of communication	Deirdre Rogusky	Business Process

- Update any field, as required.
- Click **Save & Close**.

Open lines of communication
Lesson Learned

Details

Name	* Open lines of communication	Observation	Everyone on the team freely shares information which is keeping us on target.
Category	Business Process	Recommendation	N/A
		Lesson Learned	The team can move faster when everyone keeps open lines of communication.
		Action Taken	Recognized the team and made this point to everyone so they could understand the full impact of keeping each informed.

Managing documents



Portfolio/Program Manager



Portfolios – Documents tab

1. UPLOAD NEW DOCUMENTS

- Ensure you have the appropriate portfolio or program open in **Portfolios**.
- Click the **Documents** tab.

Cassowary Product Development
Program

Details Strategic Goals Key Dates Projects Status Updates Stakeholders Issues Risks Decisions Changes Constraints Assumptions Lessons **Documents**

Program

Name	* Cassowary Product Development
Description	This program includes projects associated with the Cassowary line of Products.

Business Case

Overview

This program will provide for a mobile support app, the introduction of three new product lines to continue meeting the needs of our customers, and reduce our raw material

Options

Outsourcing the development of the mobile app; establish a focus group to gather customer requirements; establish a supply chain that will allow us to reduce inventory.

Program Status

Program Completion

10%

- Click **Upload**.

Cassowary Product Development
Program

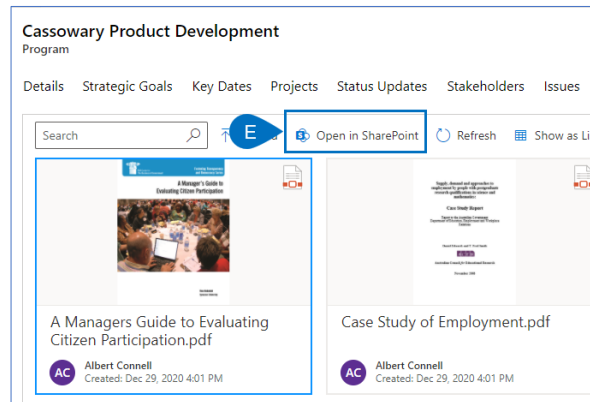
Details Strategic Goals Key Dates Projects Status Updates Stakeholders Issues

Search **Upload** Open in SharePoint Refresh Show as List

A Managers Guide to Evaluating Citizen Participation.pdf
Albert Connell
Created: Dec 29, 2020 4:01 PM

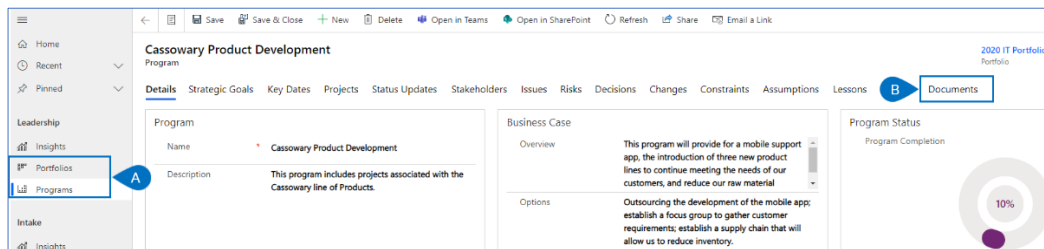
Case Study of Employment.pdf
Albert Connell
Created: Dec 29, 2020 4:01 PM

- Browse and select** the new document to be added to the repository.
- Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.

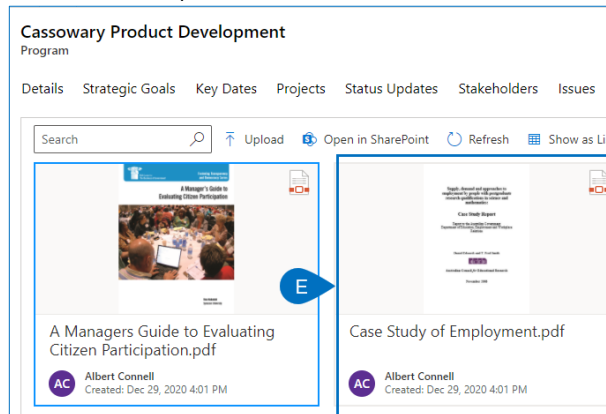


2. VIEW OR UPDATE EXISTING DOCUMENTS

- Ensure you have the appropriate portfolio or program open in **Portfolios**.
- Click the **Documents** tab.



- Click on the appropriate document/tile to open it.



- Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.

Cassowary Product Development Program

[Details](#)
[Strategic Goals](#)
[Key Dates](#)
[Projects](#)
[Status Updates](#)
[Stakeholders](#)
[Issues](#)

Open in SharePoint
Refresh
Show as List

A Manager's Guide to Evaluating Citizen Participation

Albert Connell
Created: Dec 29, 2020 4:01 PM

Case Study of Employment.pdf

Albert Connell
Created: Dec 29, 2020 4:01 PM