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.

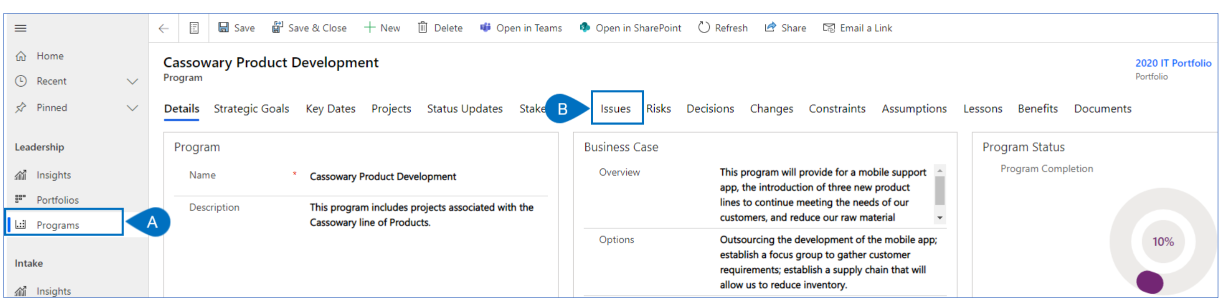
Managing issues

Program Manager

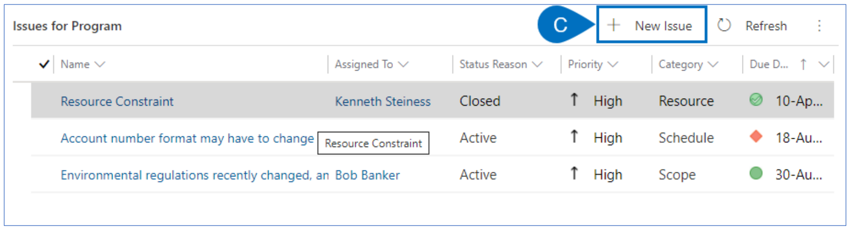
Portfolios – Issues tab

1. CREATE AN ISSUE

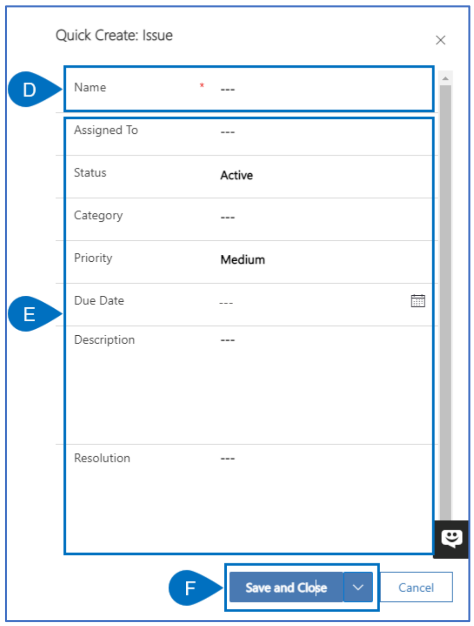
a. Ensure you have the appropriate program open in **Portfolios**.
b. Click the **Issues** tab.



c. Click **+ New Issue**.

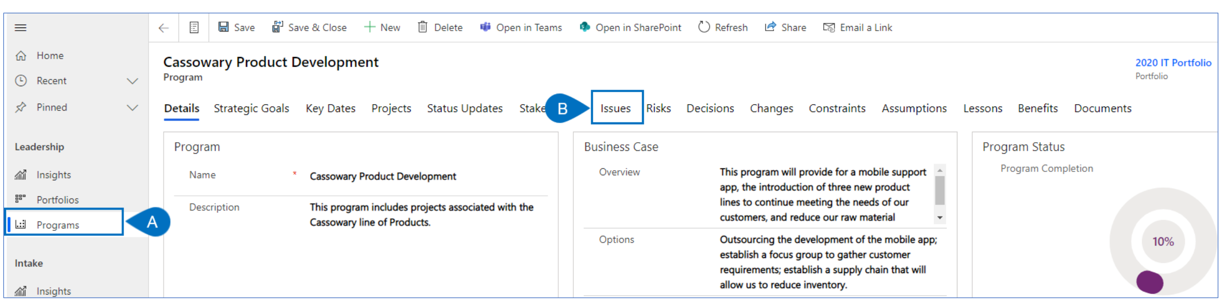


d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the issue in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.

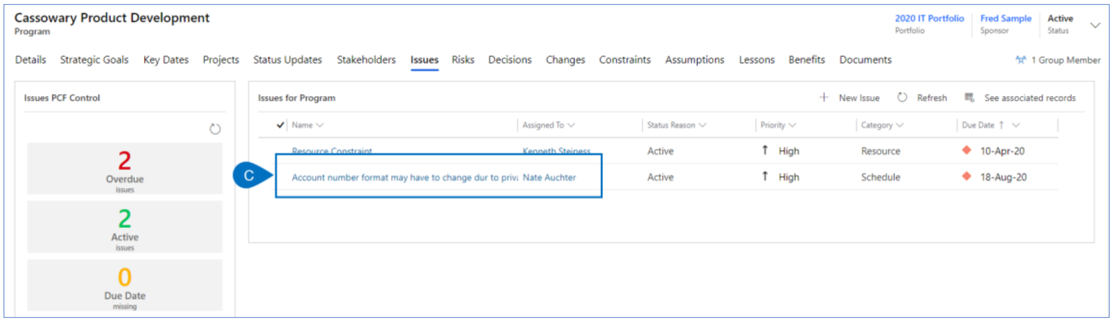


2. UPDATE ISSUES

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

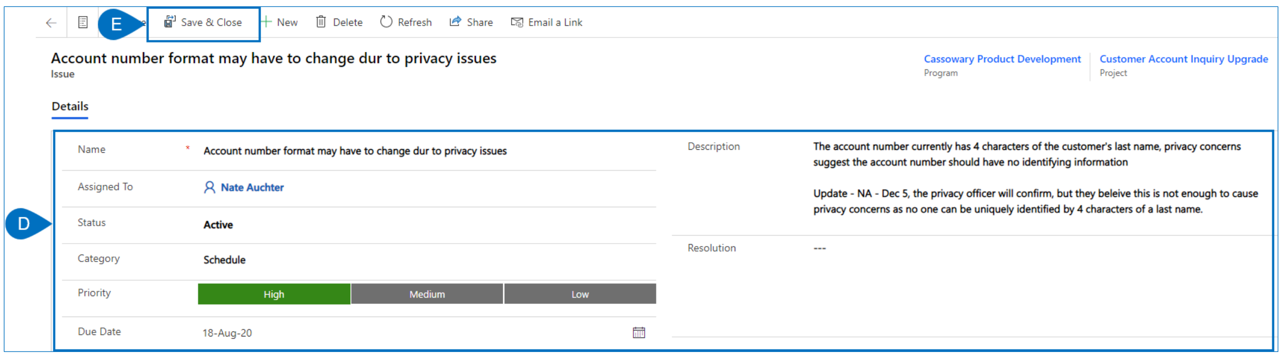


c. Click on the **Issue** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



Managing risks

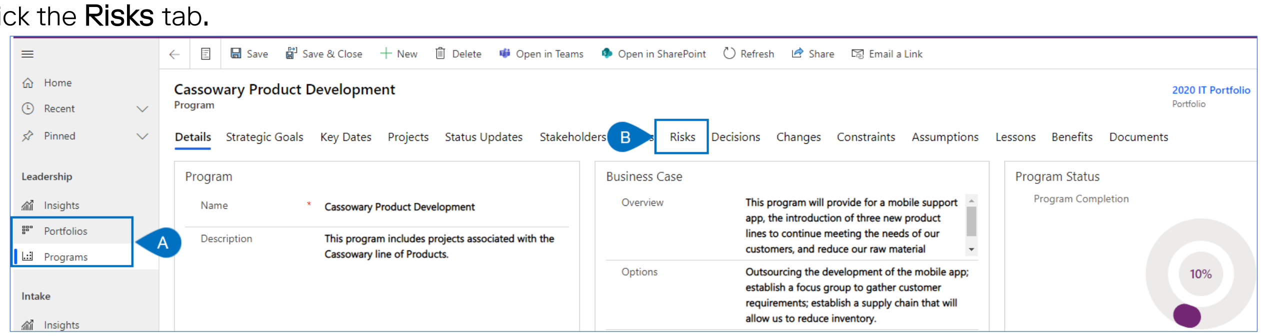
Portfolio/Program Manager

Portfolios – Risks tab

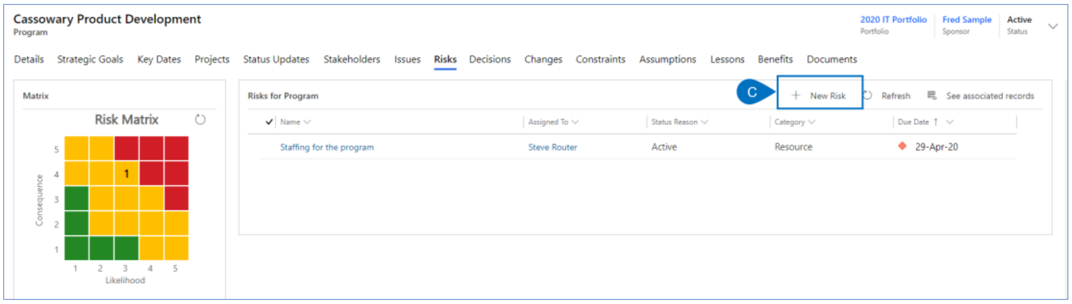
1. CREATE A RISK

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

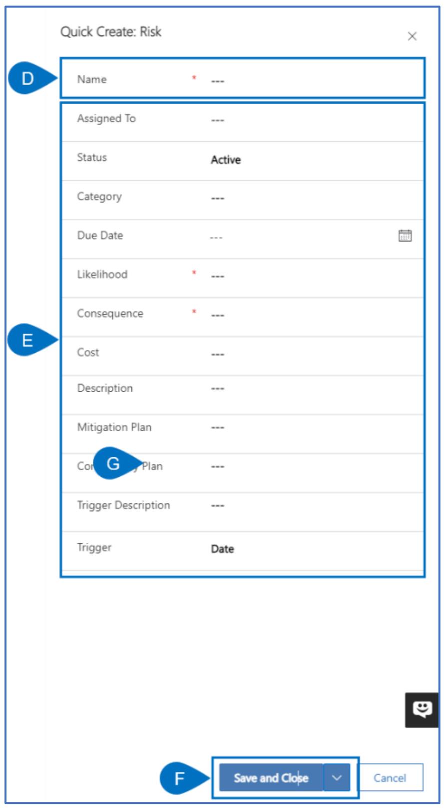
b. Click the **Risks** tab.



c. Click **+ New Risk.**



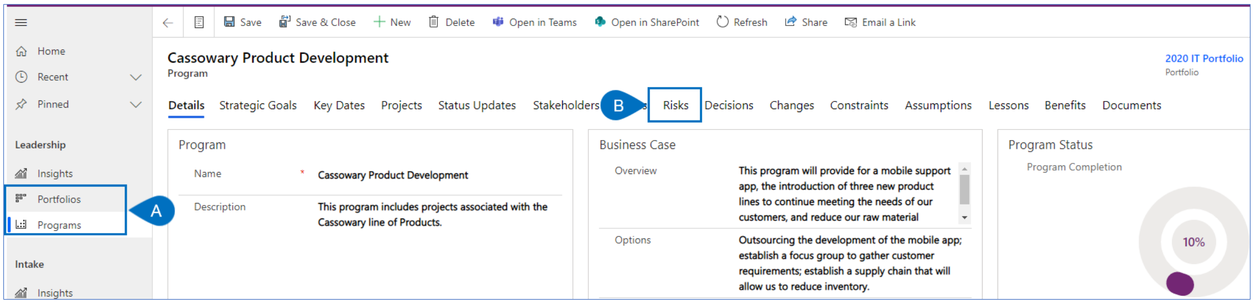
d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the risk in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.



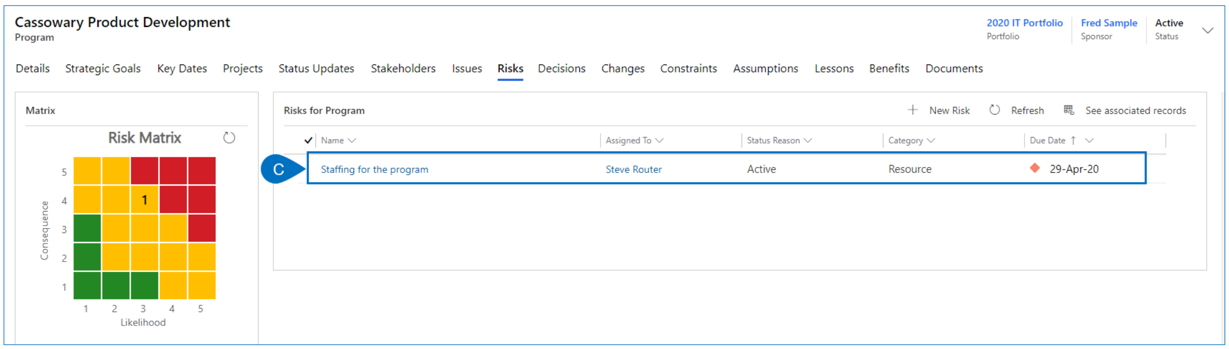
2. UPDATE RISKS

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

b. Click the **Risks** tab.

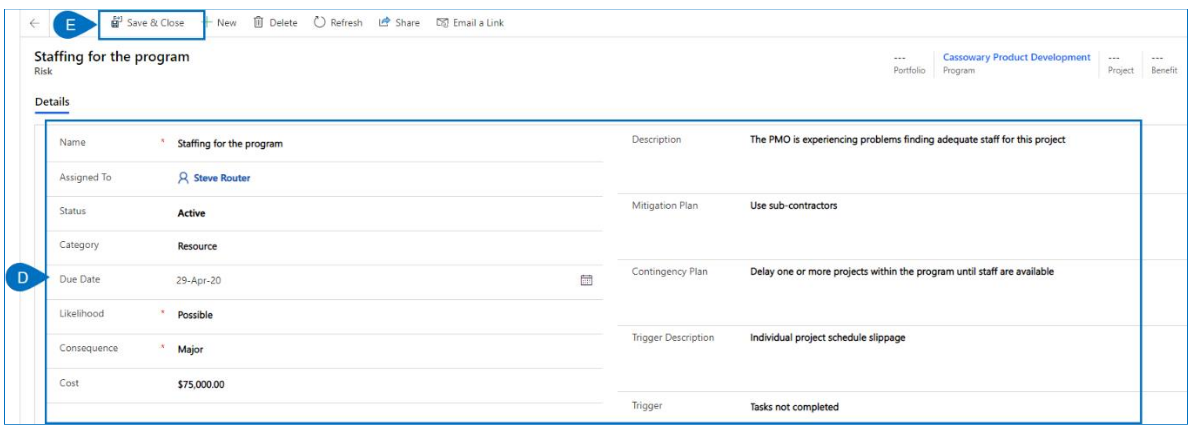


c. Click on the **Risk** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



Tracking decisions

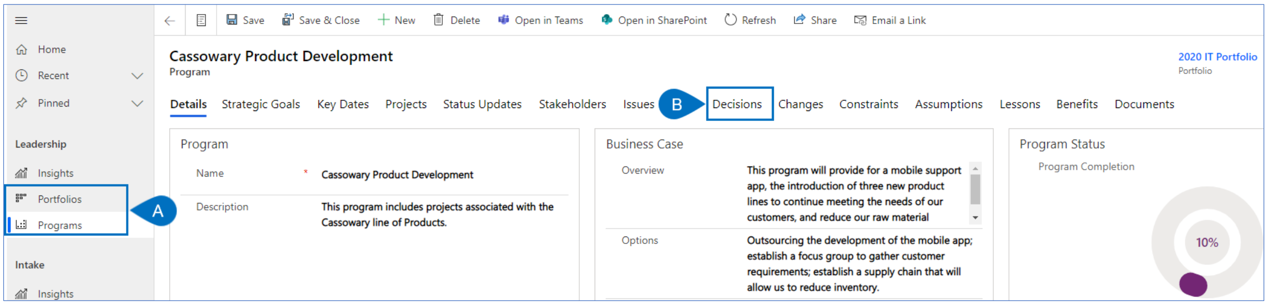
Portfolio/Program Manager

Portfolios – Decisions tab

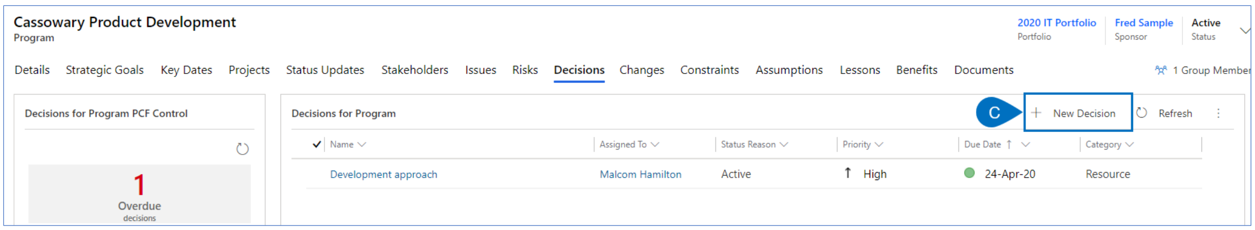
1. CREATE NEW DECISION

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

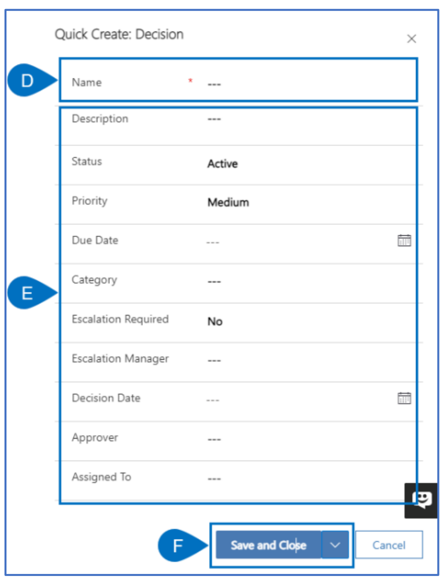
b. Click the **Decisions** tab.



c. Click **+ New Decision.**



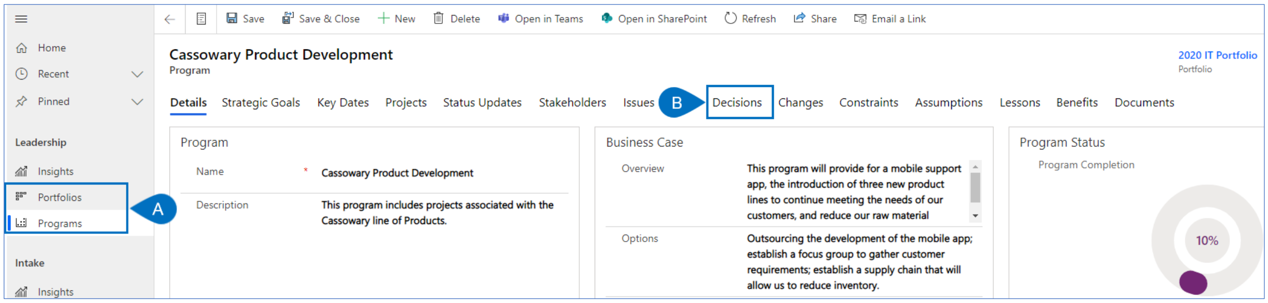
d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the decision in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close.**



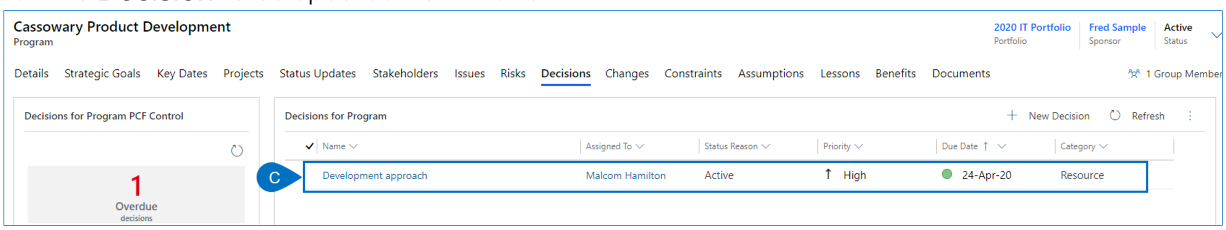
2. UPDATE DECISIONS

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

b. Click the **Decisions** tab.

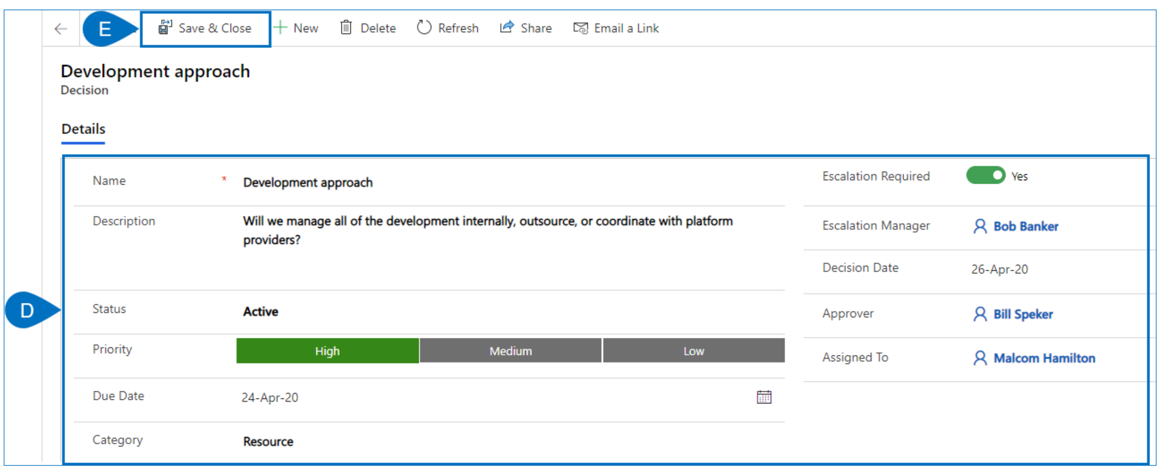


c. Click on the **Decision** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



Recording and managing change requests

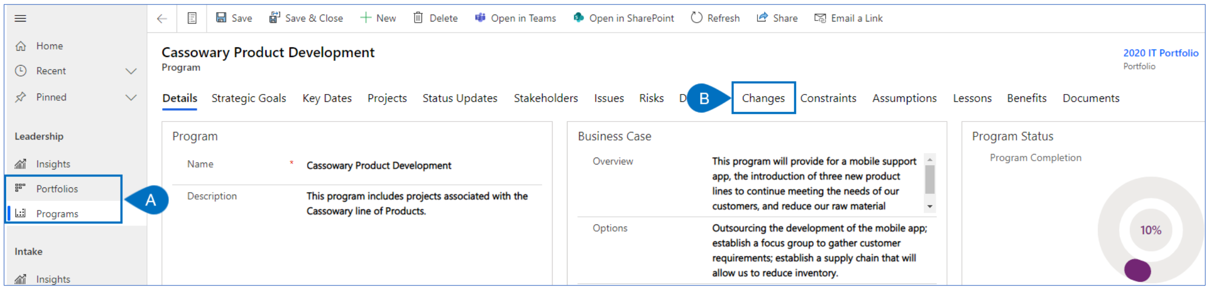
Portfolio/Program Manager

Portfolios – Changes tab

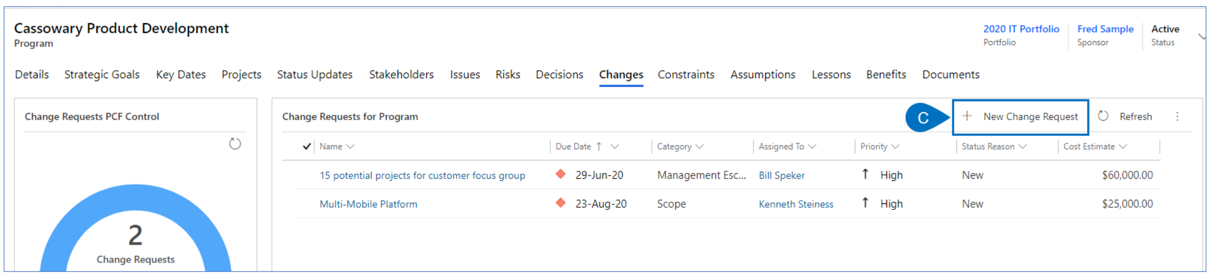
1. CREATE NEW CHANGE REQUEST

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

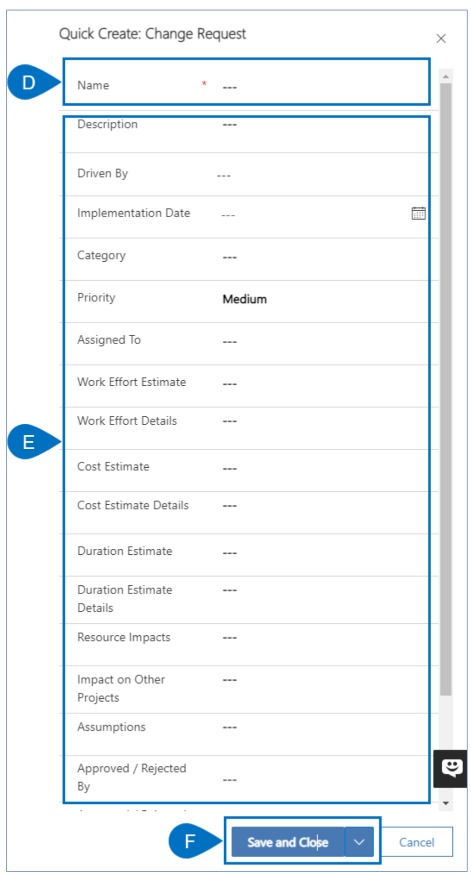
b. Click the **Changes** tab.



c. Click **+ New Change Request**.



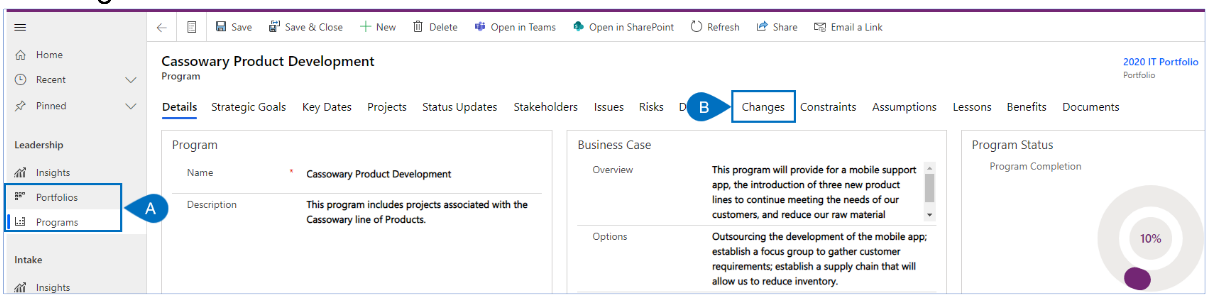
d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the change request in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close.**



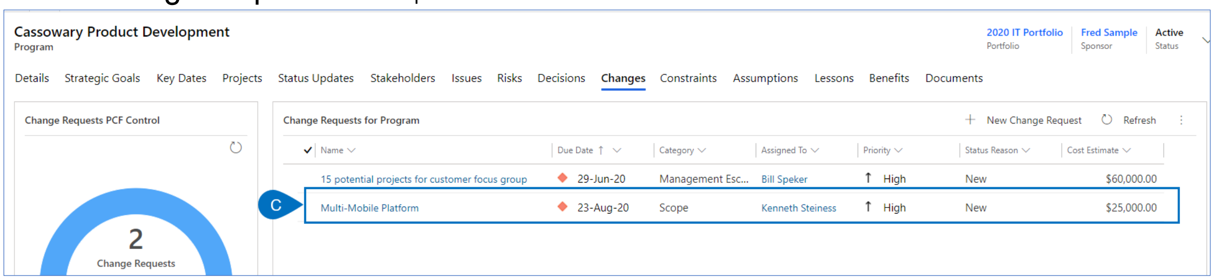
2. UPDATE CHANGE REQUESTS

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

b. Click the **Changes** tab.

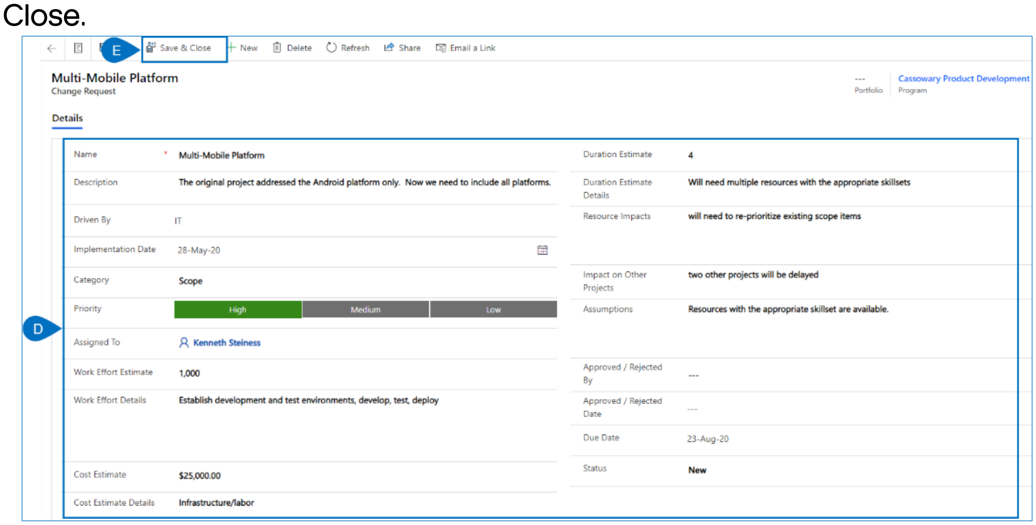


c. Click on the **Change Request** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



Documenting constraints

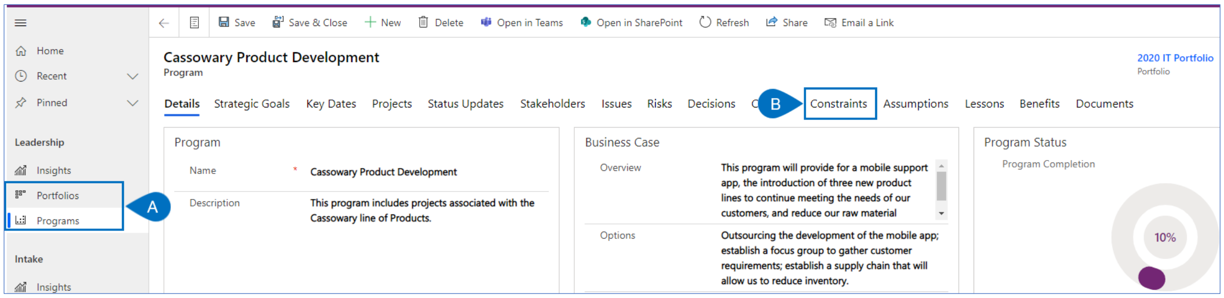
Portfolio/Program Manager

Portfolios – Constraints tab

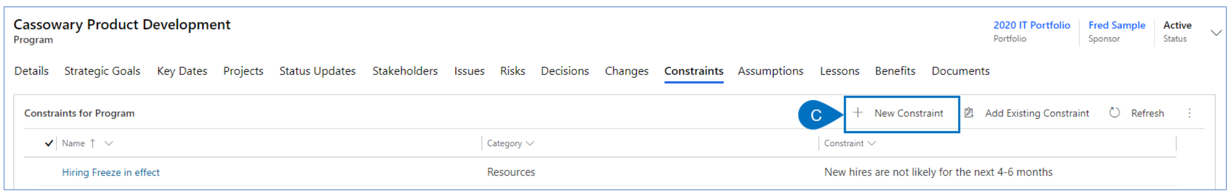
1. CREATE NEW CONSTRAINT

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

b. Click the **Constraints** tab.



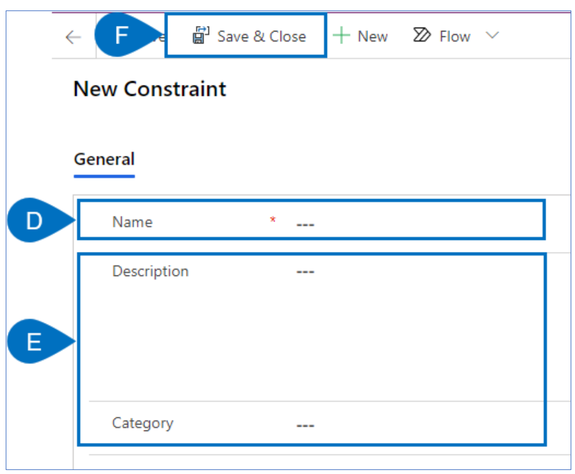
c. Click **+ New Constraint.**



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.

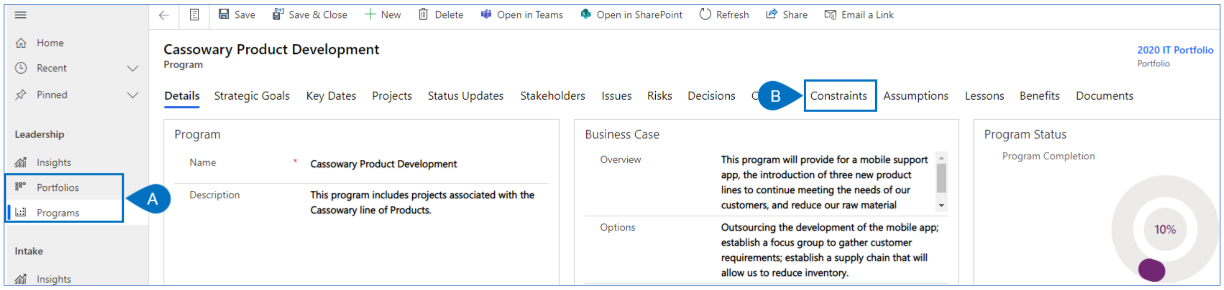
f. Click **Save and Close.**



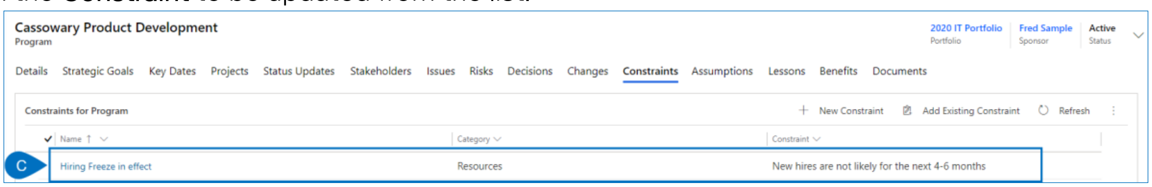
2. UPDATE CONSTRAINTS

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

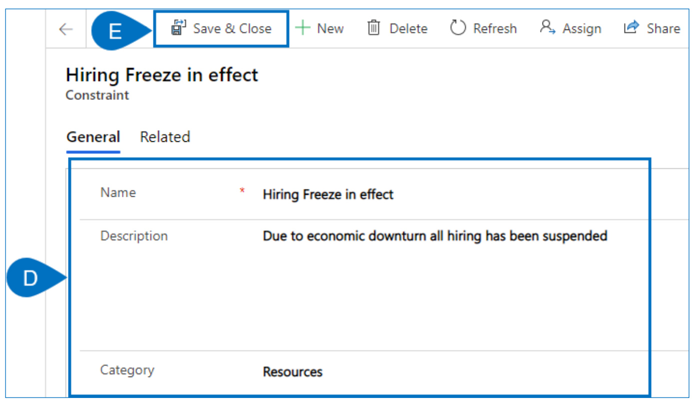
b. Click the **Constraints** tab.



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



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



Capturing assumptions

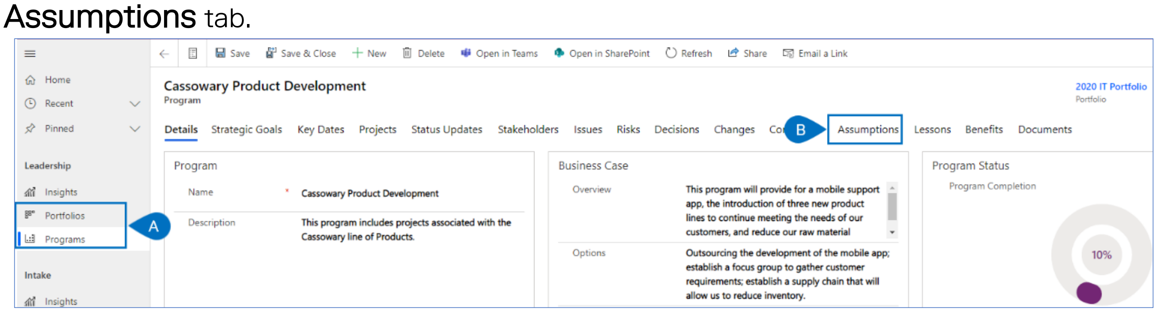
Portfolio/Program Manager

Portfolios – Assumptions tab

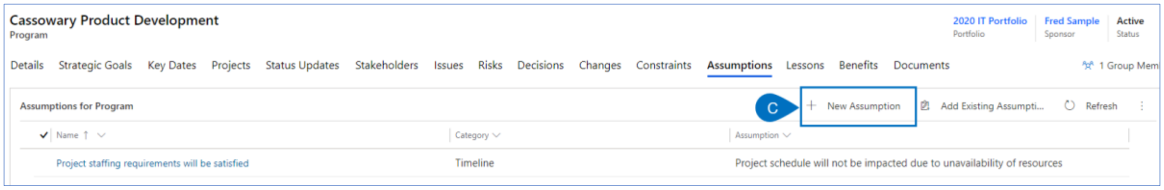
1. CREATE NEW ASSUMPTION

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

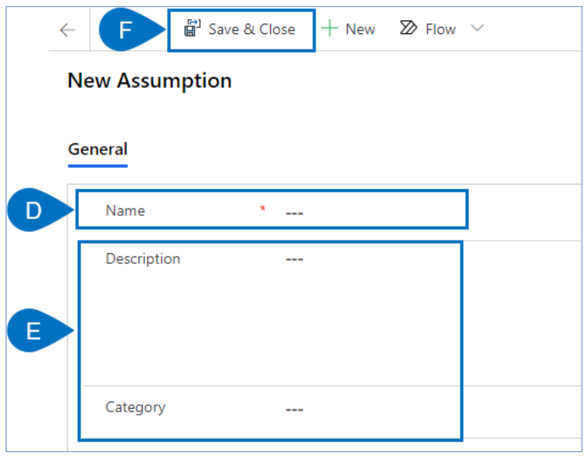
b. Click the **Assumptions** tab.



c. Click **+ New Assumption**.

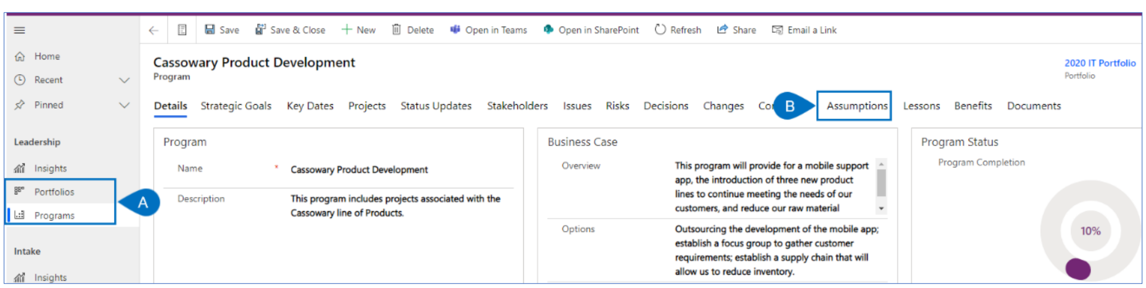


d. Fill in the **Name** field. It is mandatory and should be clear and concise to help users identify the assumption in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.

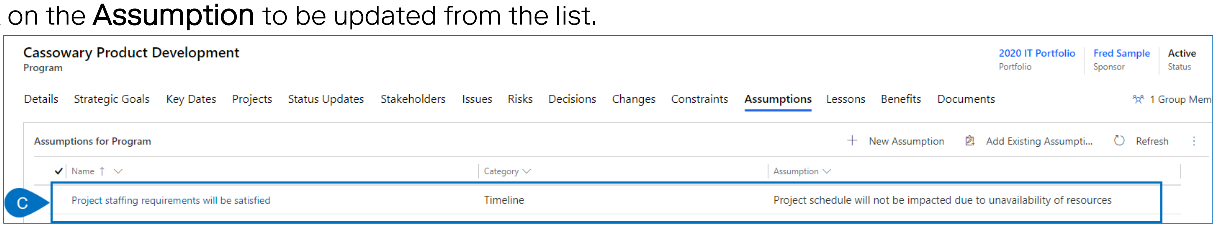


2. UPDATE ASSUMPTIONS

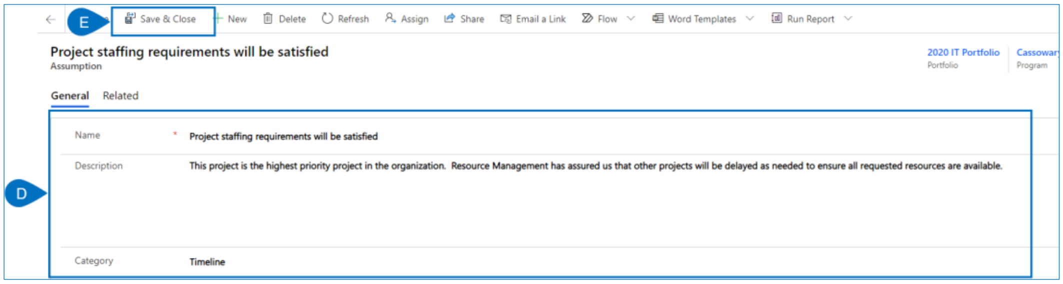
a. Ensure you have the appropriate portfolio or program open in **Portfolios**.
b. Click the **Assumptions** tab.



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



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



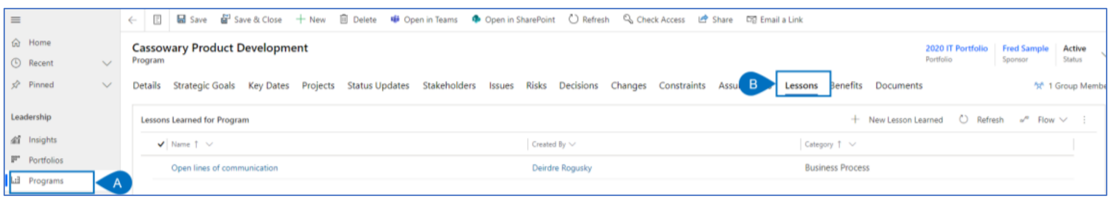
Capturing lessons learned

Program Manager

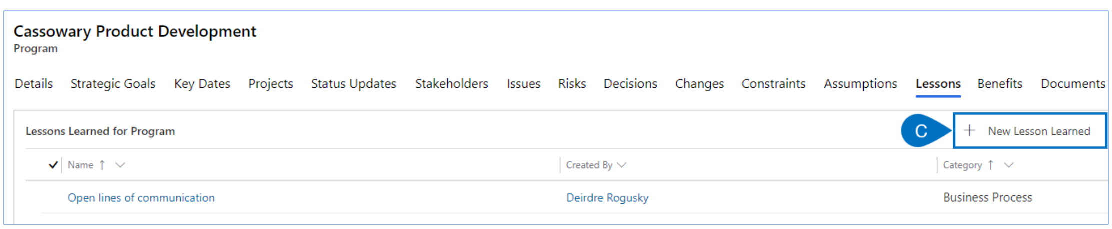
Portfolios – Lessons tab

1. CREATE NEW LESSON LEARNED

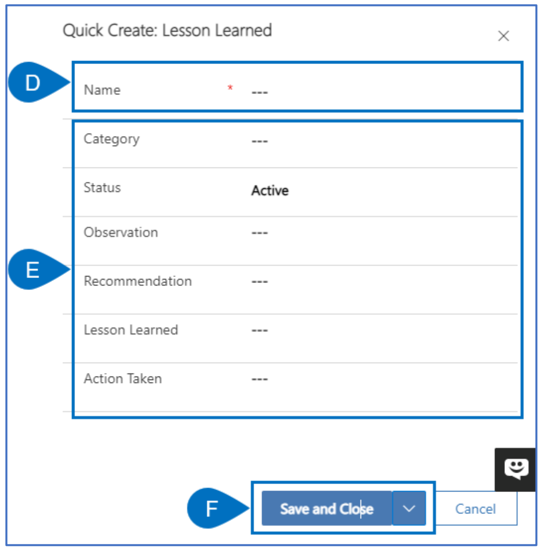
a. Ensure you have the appropriate program open in **Portfolios**.
b. Click the **Lessons** tab.



c. Click **+ New Lesson Learned.**



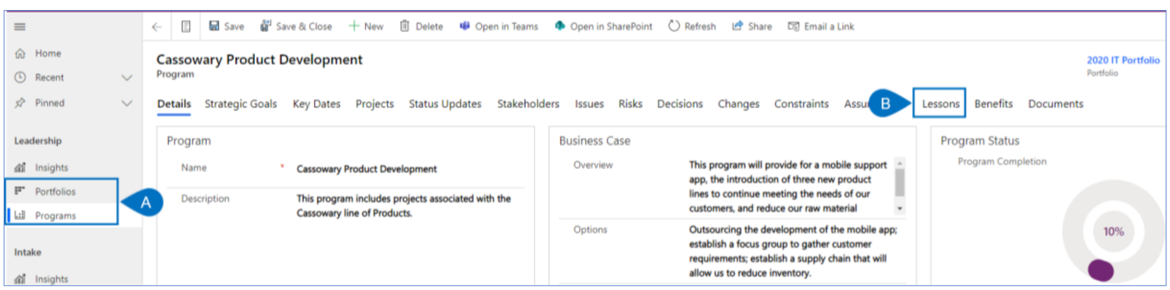
d. Fill in the Name field. It is mandatory and should be clear and concise to help users identify the lesson learned in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.



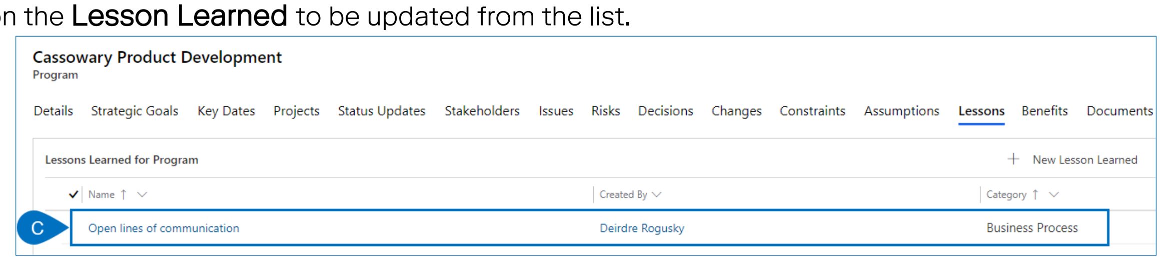
2. UPDATE LESSONS LEARNED

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

b. Click the **Lessons** tab.

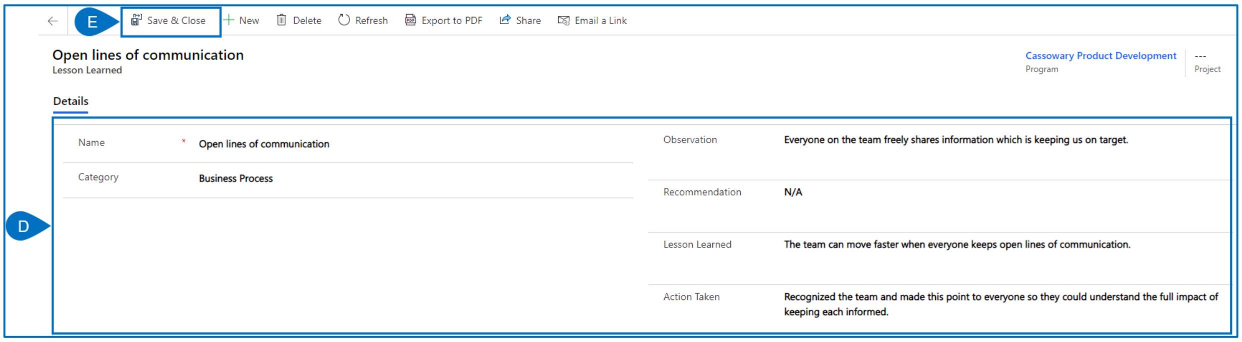


c. Click on the **Lesson Learned** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



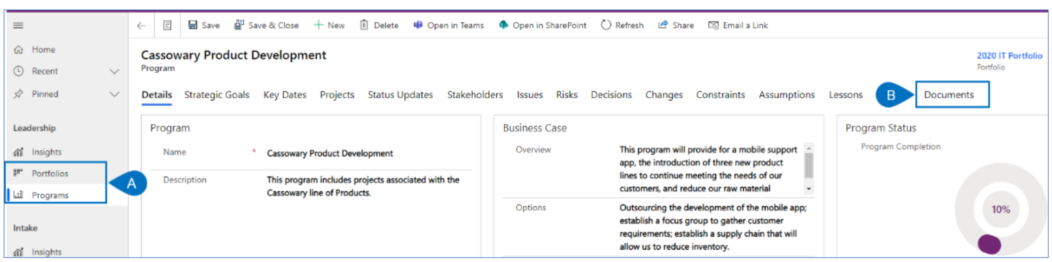
Managing documents

Portfolio/Program Manager

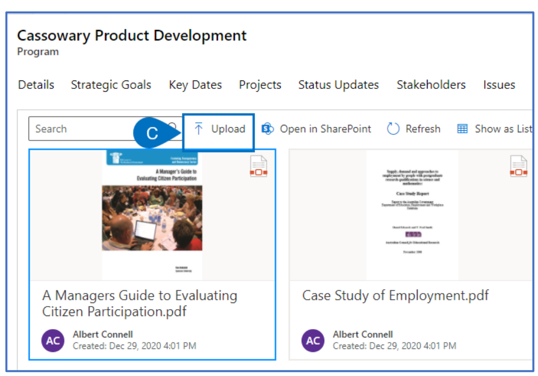
Portfolios – Documents tab

1. UPLOAD NEW DOCUMENTS

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

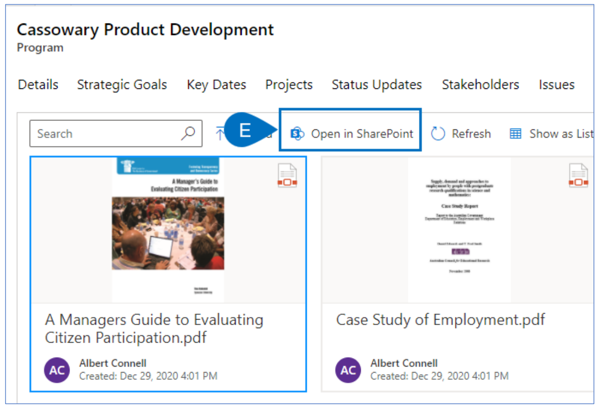


c. Click **Upload**.



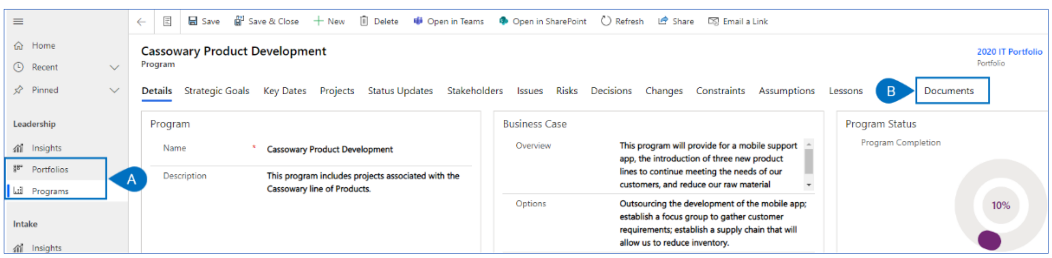
d. **Browse and select** the new document to be added to the repository.

e. 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.

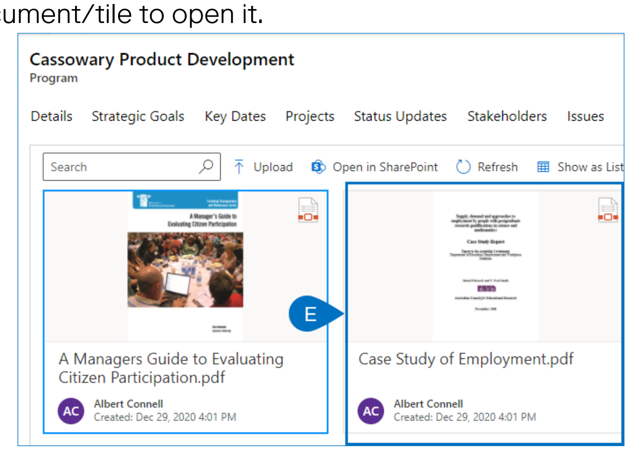


2. VIEW OR UPDATE EXISTING DOCUMENTS

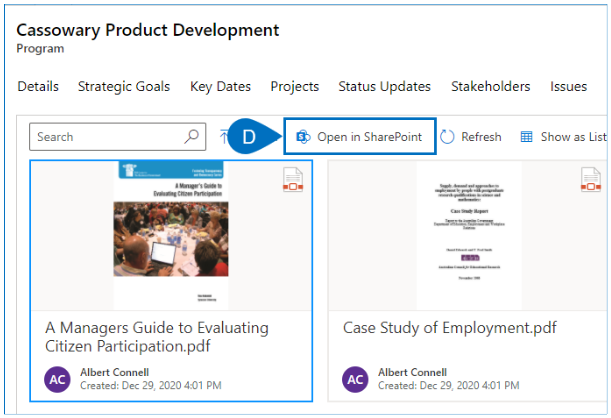
a. Ensure you have the appropriate portfolio or program open in **Portfolios.**
b. Click the **Documents** tab.



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



d. 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
Search
D
Open in SharePoint
Refresh
Show as List
A Managers Guide to Evaluating Citizen Participation.pdf
AC
Albert Connell
Created: Dec 29, 2020 4:01 PM
Case Study of Employment.pdf
AC
Albert Connell
Created: Dec 29, 2020 4:01 PM

