Overview

This Job Aid defines the steps to follow for creating portfolios and programs in the platform.

Portfolios in the platform allow you to combine projects into either portfolios or programs. This allows you to define and control the details at the project level while also enabling big picture management for larger initiatives.

There are four (4) core actions for creating portfolios and programs. Only the first and last are mandatory.

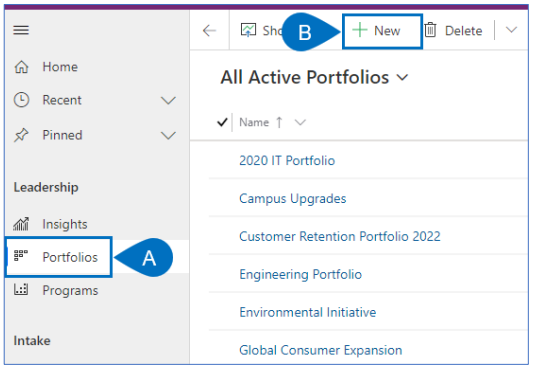
1. Documenting Charter/Business Case
2. Capturing Key Dates
3. Identifying Stakeholders
4. Adding related programs/projects

Documenting Charter/Business Case

Portfolio/Program Manager | Portfolios – Portfolio (or Program) - Details

1. CAPTURE THE CHARTER/BUSINESS CASE

a. Ensure you are in **Portfolios** and click **Portfolios** (or **Programs**) in the **Leadership** section.
b. Click **+ New** from the command bar.



c. Complete the Portfolio (or Program) pane with as much information as you have now.
d. The Portfolio (or Program) Name field is mandatory.

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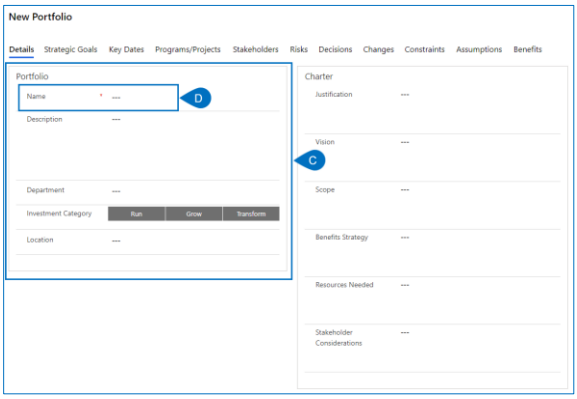
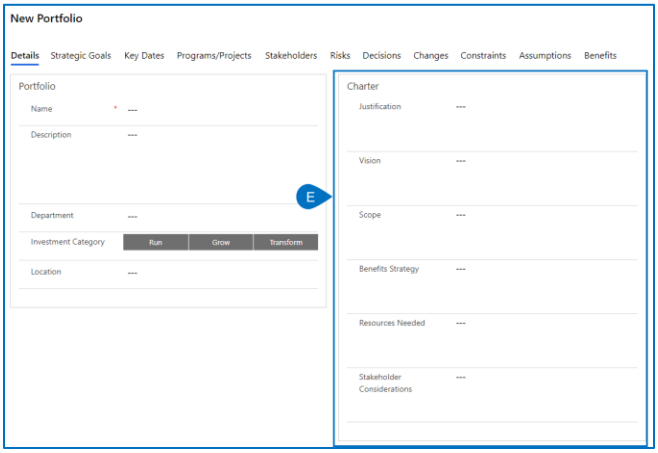
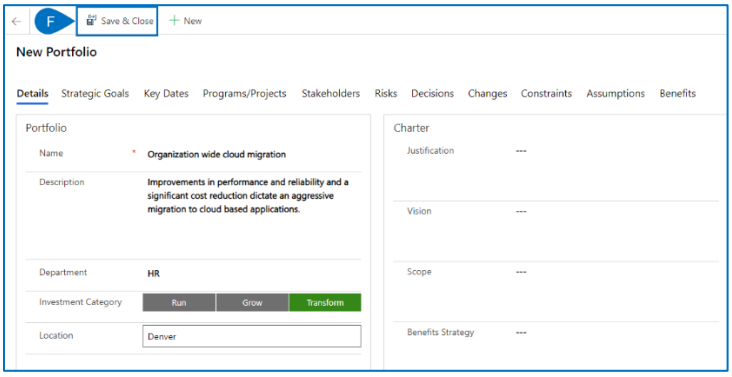


e. Similarly, complete the Charter (or Business Case) pane with the information currently available.



f. Click **Save** (or **Save & Close**) to create the Portfolio (Program).



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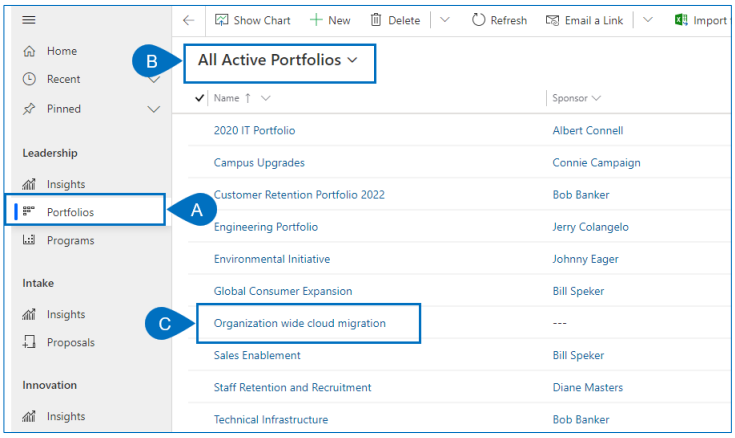
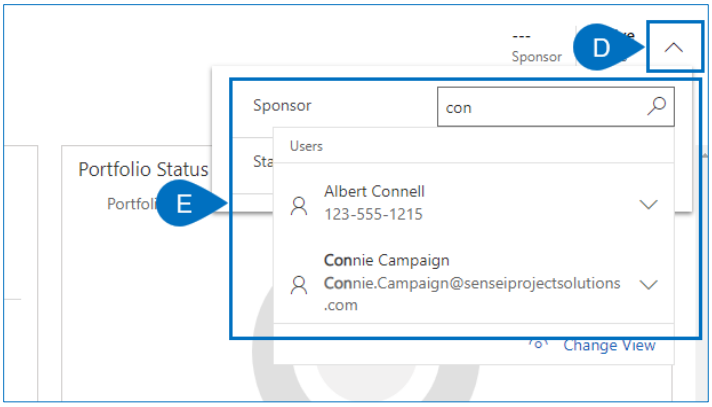
2. BUILD THE TEAM

a. Select **Portfolios** (or **Programs**) from the Site Map to display the list of Active Portfolios (Active Programs).
b. Adjust the view as needed to ensure the one you are looking for is displayed.
c. Select the Portfolio (or Program) to be updated.



d. Select the header.
e. Search for and select the **Sponsor**.



f. Click **Group Members**.
g. Search for and add members to the Microsoft 365 group.
h. Click **Create**.
i. Click **Save & Close** to finish.

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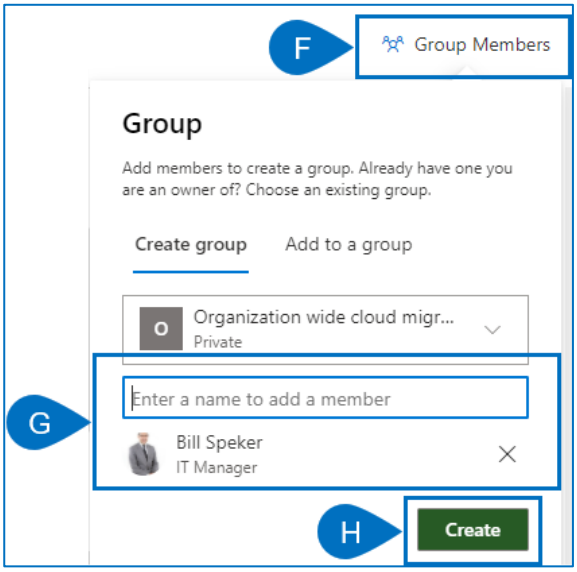


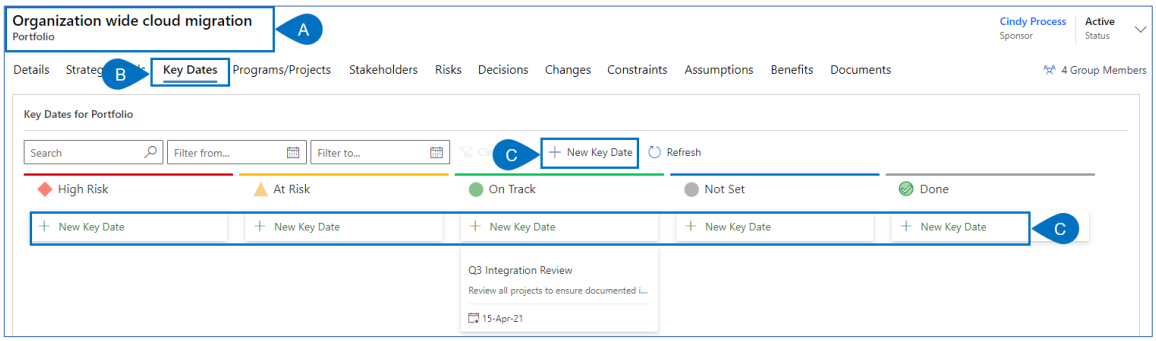
Capturing Key Dates

Portfolio/Program Manager

Portfolios– Portfolio (or Program) – Key Dates

1. CAPTURE KEY DATES

a. Ensure you have the appropriate portfolio (or program) open in **Portfolios**.
b. Click the **Key Dates** tab.
c. Click **+ New Key Date.**



d. Complete the **Quick Create Key Date** form and then click **Save and Close** from the bottom.

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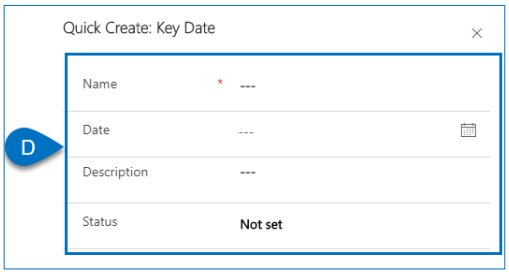
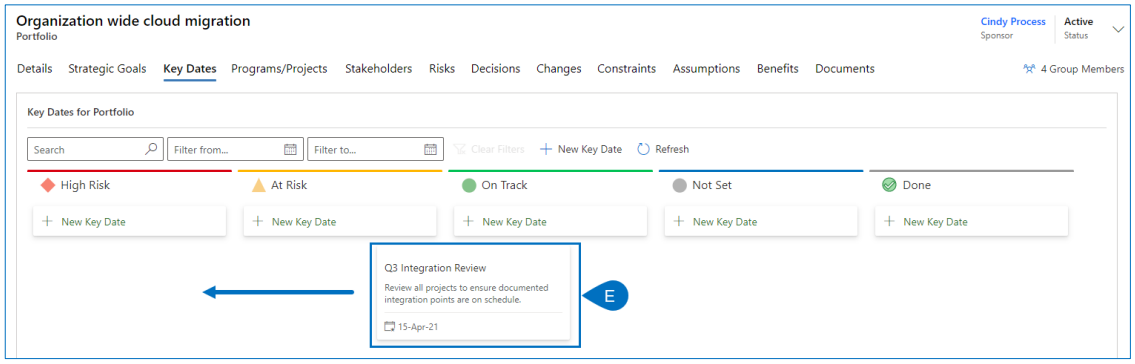


e. Set the status by dragging and dropping the **Key Dates** card to the appropriate **Status** column. If you used the **+ New Key Date** function under the appropriate KPI column this step is not necessary.



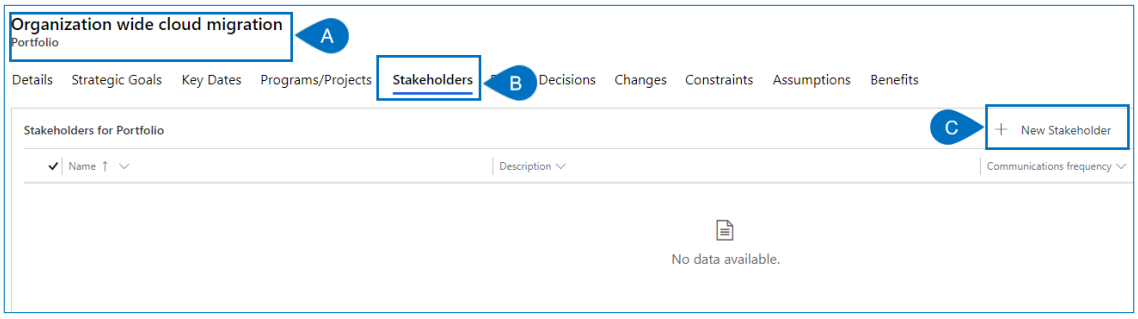
Identifying Stakeholders

Portfolio/Program Manager

Portfolios – Portfolio (or Program) – Stakeholders

1. IDENTIFY STAKEHOLDERS

a. Ensure you have the appropriate portfolio (or program) open in **Portfolios**.
b. Click the **Stakeholders** tab.
c. Click **+ New Stakeholder**.



d. Complete the **New Stakeholder** form.
e. Click **Save & Close** to finish.

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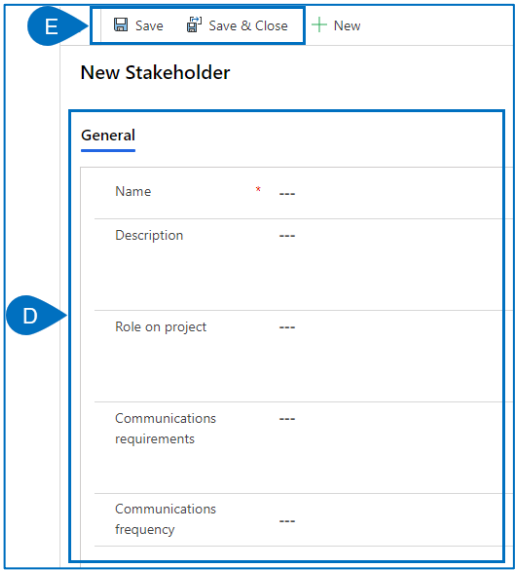


Adding related programs/projects

Portfolio/Program Manager

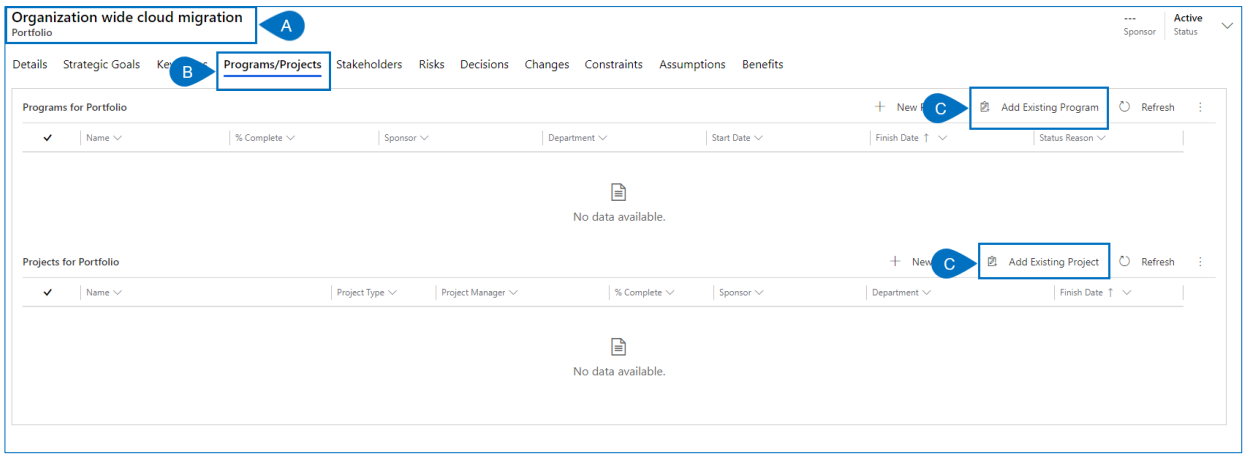
Portfolios – Portfolio (or Program) – Programs/Projects
Projects – Project Header
Portfolios – Program Header

1. ADD RELATED PROGRAMS/PROJECTS

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

b. Click the **Programs/Projects** (or **Projects**) tab.

c. Click **Add Existing Program** (or **Add Existing Project**).



d. Click **All records** if the record you are looking for is not shown.

e. Select the appropriate **Program (or Project)**.

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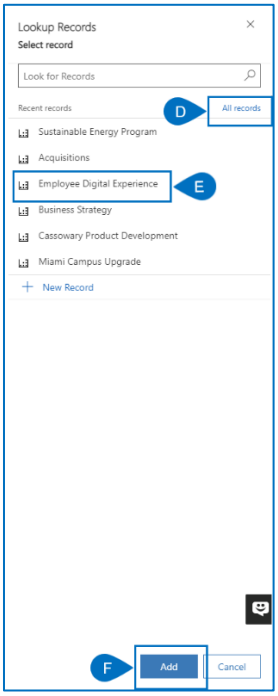
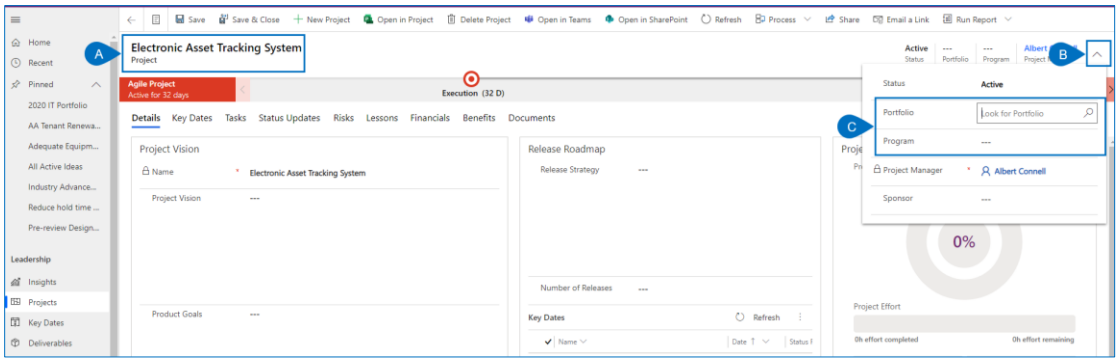
f. Click Add.
g. Click Save & Close.



2. RELATE PROJECTS TO A PORTFOLIO/PROGRAM

a. Ensure you have the appropriate project open in **Projects**.
b. Open the **Project header**.
c. Search for and select the **appropriate Portfolio (Program).**



3. RELATE PROGRAMS TO A PORTFOLIO

a. Ensure you have the appropriate program open in **Portfolios**.
b. Open the **Program header**.
c. Search for and select the **appropriate Portfolio.**

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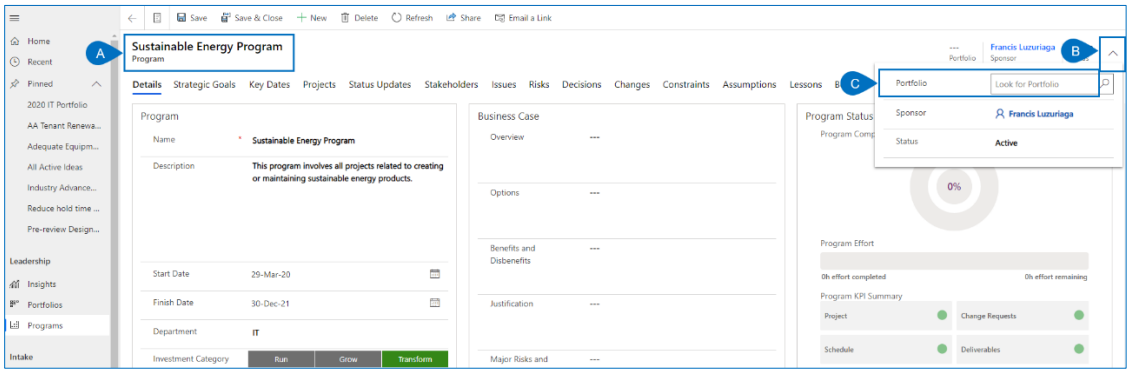

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