

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



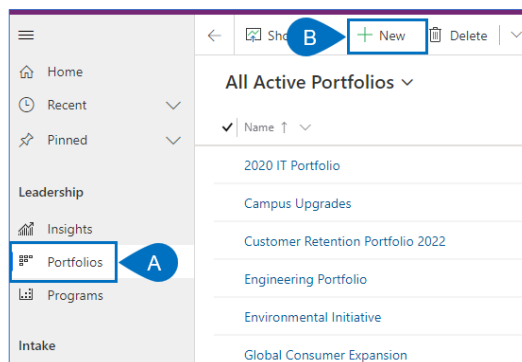
Portfolio/Program Manager



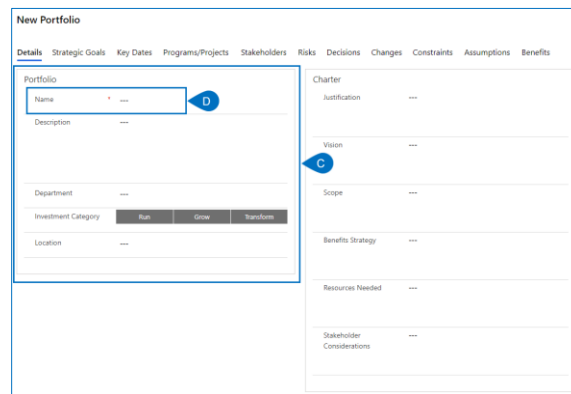
Portfolios – Portfolio (or Program) - Details

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.



New Portfolio

Details Strategic Goals Key Dates Programs/Projects Stakeholders Risks Decisions Changes Constraints Assumptions Benefits

Portfolio

Name D

Description

Department

Investment Category Run Grow Transform

Location

Charter

Justification

Vision

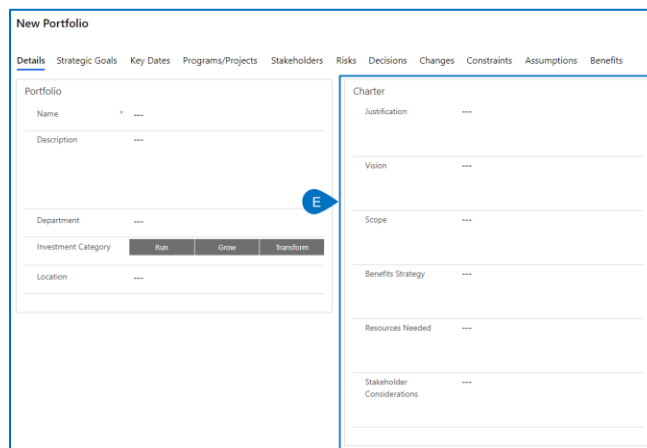
Scope

Benefits Strategy

Resources Needed

Stakeholder Considerations

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



New Portfolio

Details Strategic Goals Key Dates Programs/Projects Stakeholders Risks Decisions Changes Constraints Assumptions Benefits

Portfolio

Name

Description

Department

Investment Category Run Grow Transform

Location

Charter

Justification E

Vision

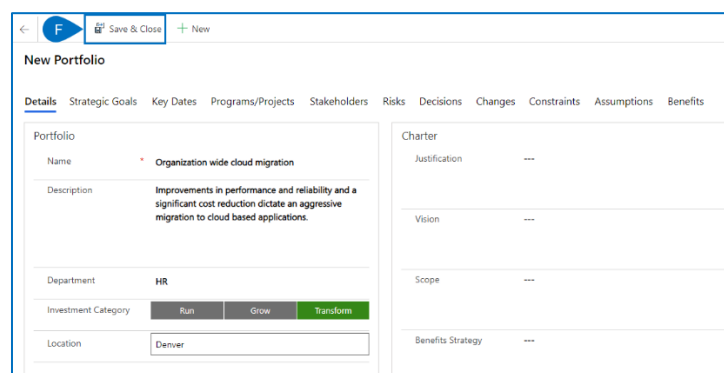
Scope

Benefits Strategy

Resources Needed

Stakeholder Considerations

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



New Portfolio

Details Strategic Goals Key Dates Programs/Projects Stakeholders Risks Decisions Changes Constraints Assumptions Benefits

Portfolio

Name

Description

Department

Investment Category Run Grow Transform

Location

Charter

Justification

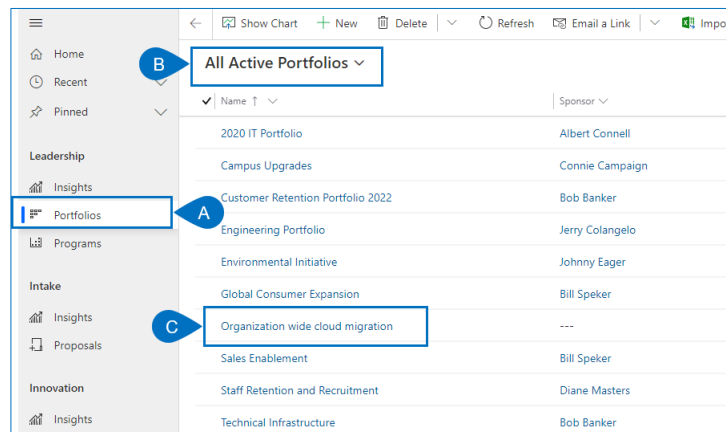
Vision

Scope

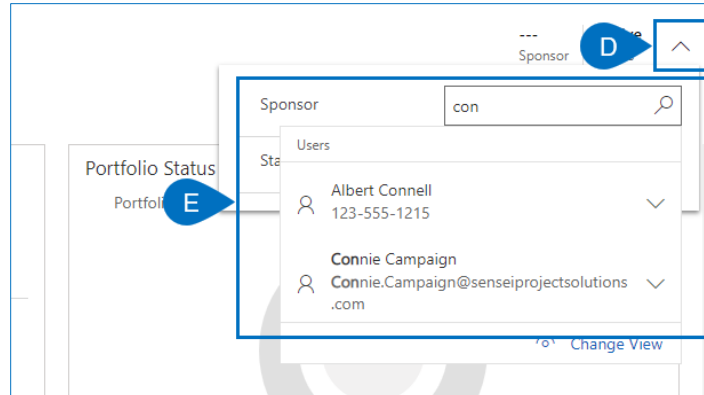
Benefits Strategy

2. BUILD THE TEAM

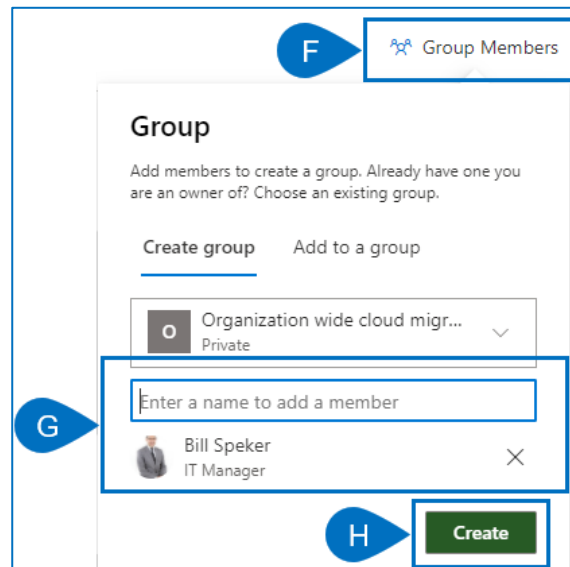
- Select **Portfolios** (or **Programs**) from the Site Map to display the list of Active Portfolios (Active Programs).
- Adjust the view as needed to ensure the one you are looking for is displayed.
- Select the Portfolio (or Program) to be updated.



- Select the header.
- Search for and select the **Sponsor**.



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

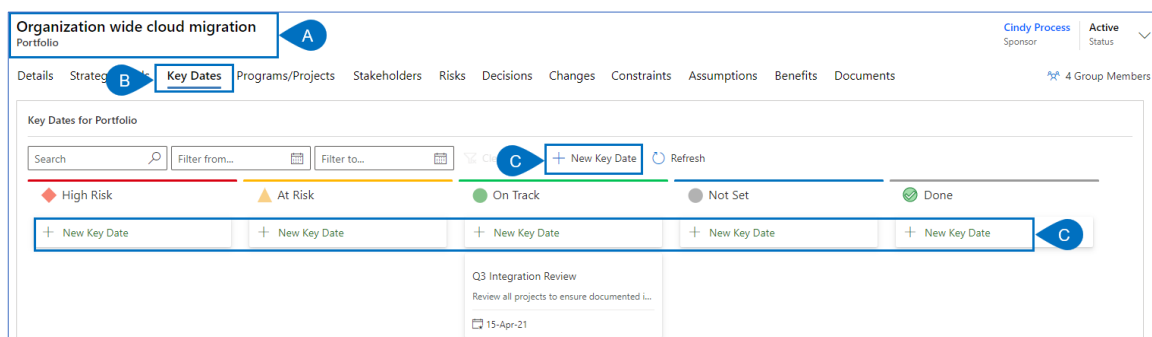


Capturing Key Dates

Portfolio/Program Manager Portfolios– Portfolio (or Program) – Key Dates

1. CAPTURE KEY DATES

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



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

Quick Create: Key Date

Name	---
Date	---
Description	---
Status	Not set

- 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.

Organization wide cloud migration
Portfolio

Details Strategic Goals **Key Dates** Programs/Projects Stakeholders Risks Decisions Changes Constraints Assumptions Benefits Documents

4 Group Members

Key Dates for Portfolio

Search Filter from... Filter to... Clear Filters + New Key Date Refresh

High Risk	At Risk	On Track	Not Set	Done
+ New Key Date	+ New Key Date	+ New Key Date	+ New Key Date	+ New Key Date

Q3 Integration Review
Review all projects to ensure documented integration points are on schedule.
15-Apr-21

Identifying Stakeholders

 Portfolio/Program Manager  Portfolios – Portfolio (or Program) – Stakeholders

1. IDENTIFY STAKEHOLDERS

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

Organization wide cloud migration
Portfolio

Details Strategic Goals Key Dates Programs/Projects **Stakeholders** Decisions Changes Constraints Assumptions Benefits

Stakeholders for Portfolio

+ New Stakeholder

✓ Name ↑ Description ↓ Communications frequency ↓

No data available.

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

Adding related programs/projects



Portfolio/Program Manager



Portfolios – Portfolio (or Program) – Programs/Projects

Projects – Project Header

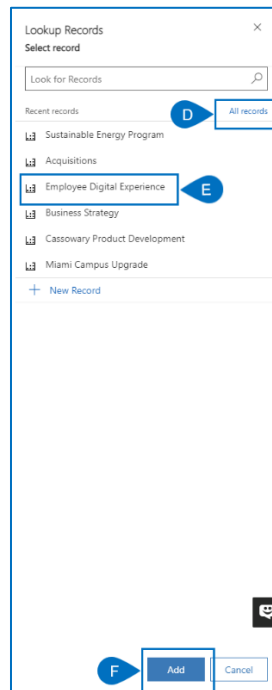
Portfolios – Program Header

1. ADD RELATED PROGRAMS/PROJECTS

- Ensure you have the appropriate portfolio (or program) open in **Portfolios**.
- Click the **Programs/Projects** (or **Projects**) tab.
- Click **Add Existing Program** (or **Add Existing Project**).

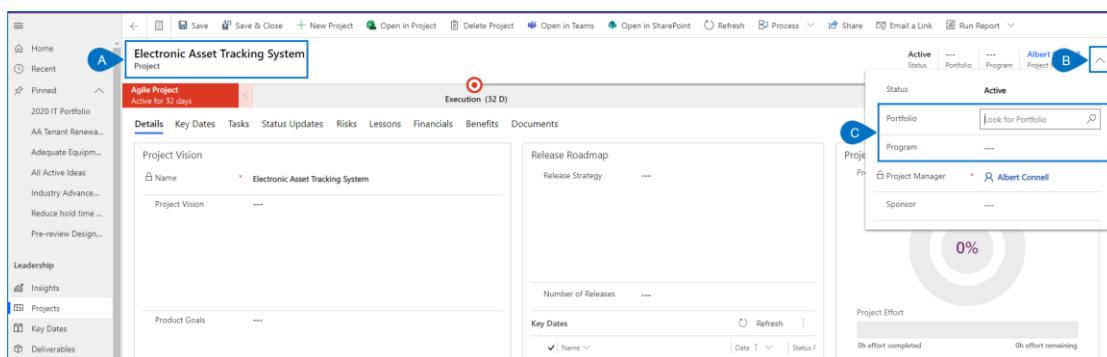
- Click **All records** if the record you are looking for is not shown.
- Select the appropriate **Program (or Project)**.

- 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**.

Sustainable Energy Program

Program

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

Program

Name **Sustainable Energy Program**

Description **This program involves all projects related to creating or maintaining sustainable energy products.**

Start Date 25-Mar-20

Finish Date 30-Dec-21

Department **IT**

Investment Category **Run** **Grow** **Transform**

Business Case

Overview ---

Options ---

Benefits and Disbenefits ---

Justification ---

Major Risks and ---

Program Status

Sponsor **Francis Luzuriaga**

Program Comp. **Active**

0%

Program Effort

0% effort completed 0% effort remaining

Program KPI Summary

Project **Change Requests**

Schedule **Deliverables**

Francis Luzuriaga
Portfolio Sponsor