Overview

This Job Aid defines the steps to follow for tracking progress on an active portfolio or program. This Job Aid assumes that a portfolio (or program), complete with the appropriate support details, has been created in the platform Portfolios 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.

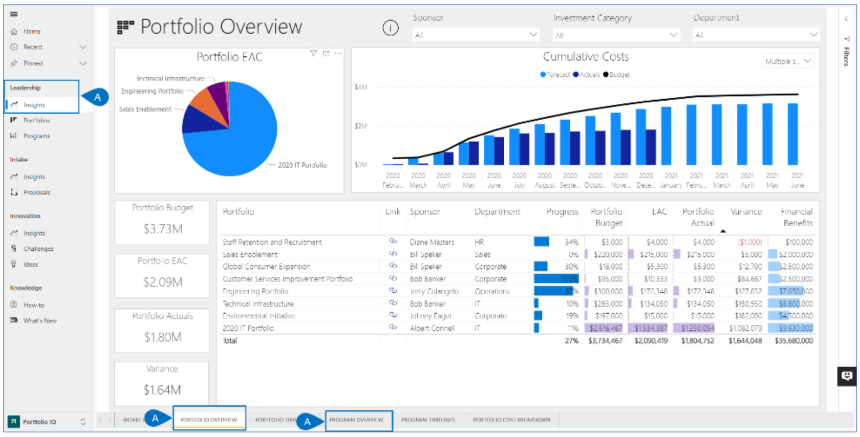
1. Understanding progress
2. Validating key dates
3. Setting Program KPIs and composing status narratives
4. Adjusting the portfolio/program

Understanding progress

Portfolio / Program Manager — Portfolios – Insights – Portfolio/Program Overview

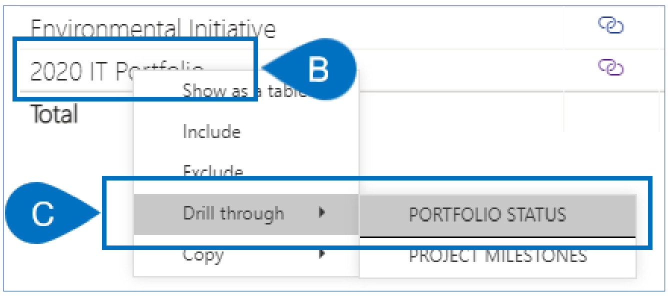
1. REVIEW PORTFOLIO LEADERSHIP INSIGHTS REPORTS

a. Select the **Portfolio (or Program) Overview** report from **Portfolio Leadership Insights**.

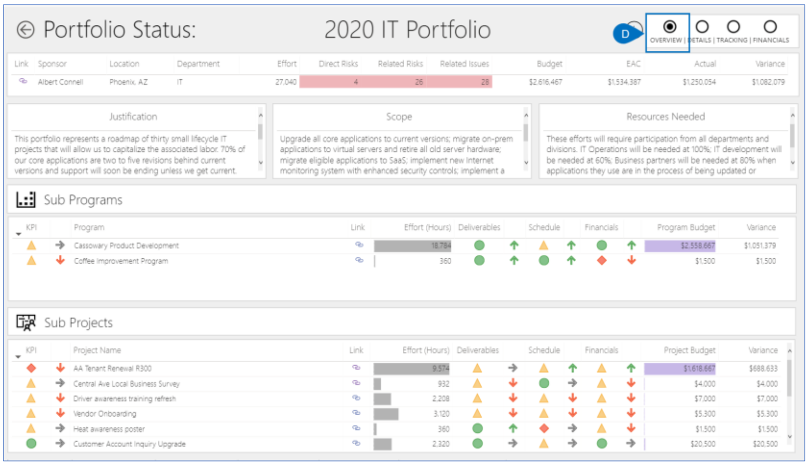


b. **Right-mouse click** on the appropriate Portfolio (or Program).

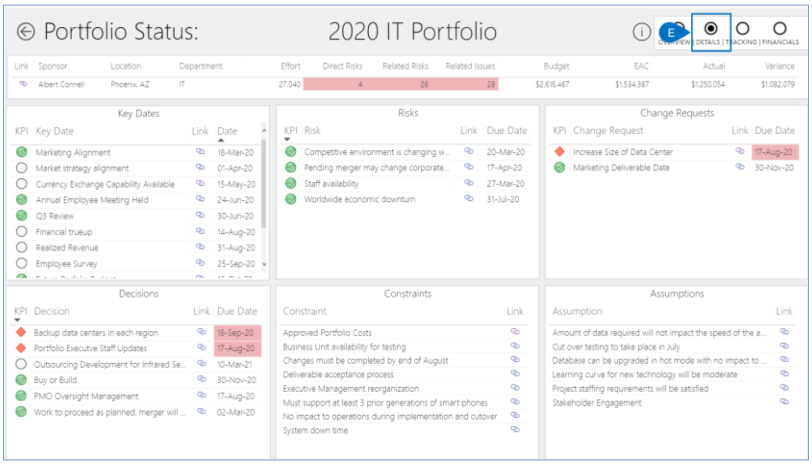
c. Select **Drill-through – Portfolio (or Program) Status.**



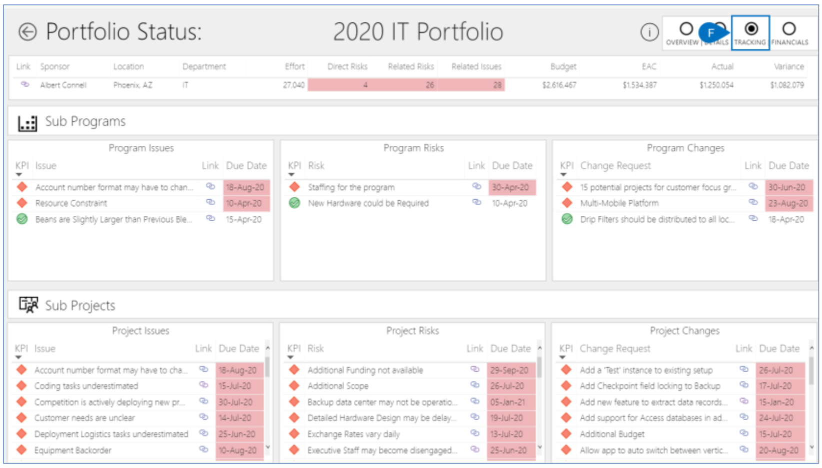
d. Review the **Overview** sub-page to understand the KPIs for all sub-programs and sub-projects and their impact on the Portfolio (or Program).



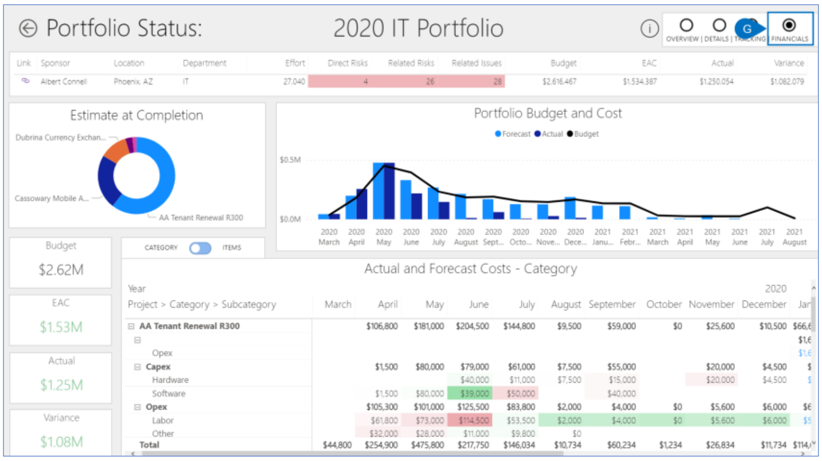
e. Review the **Details** sub-page to understand the status of all Portfolio (or Program) support items and their impact on the Portfolio (or Program).



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).

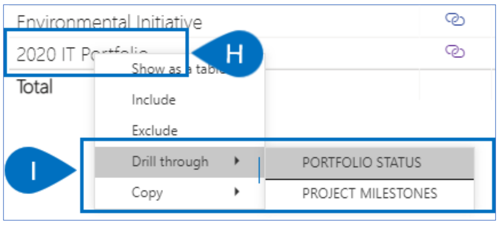


g. Review the **Financials** page to understand the overall financial picture of the Portfolio (or Program) based on the rollup of the financials from all the sub-projects.

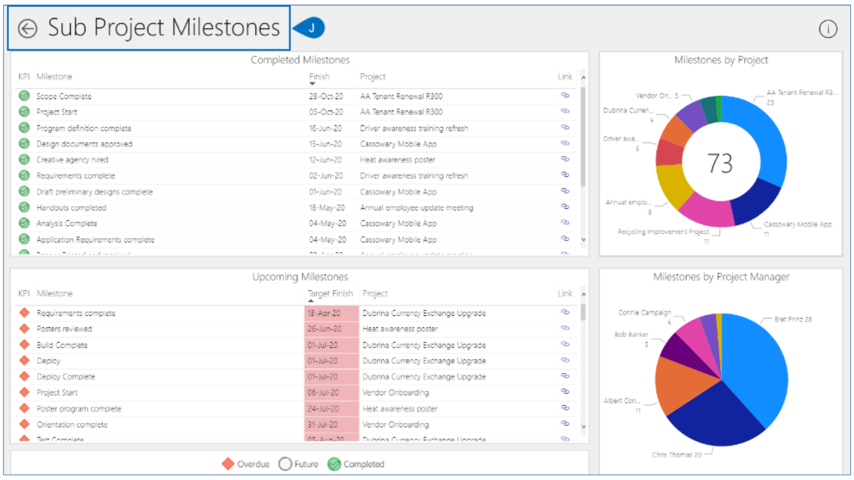


h. Return to the **Portfolio (or Program) Overview report** and right-mouse click on the appropriate Portfolio (or Program).

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

Portfolios – Key Dates tab

Portfolio Leadership Insights

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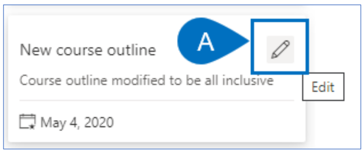
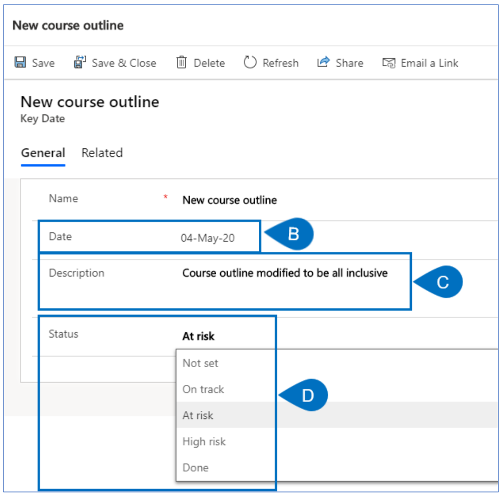
1. UPDATE KEY DATES

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.



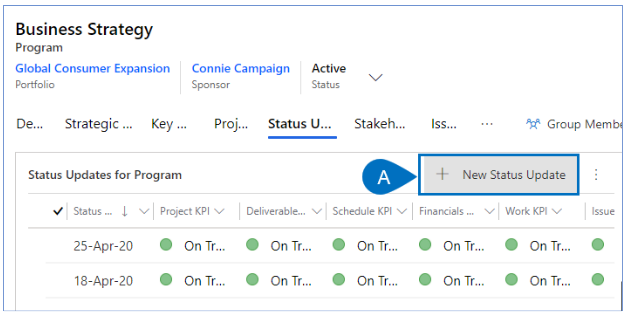
Setting Program KPIs and composing status narratives

Program Manager

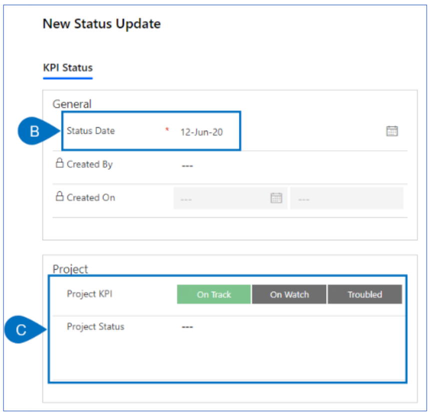
Portfolios – Status Updates

1. SET KPIS AND RECORD STATUS NARRATIVE

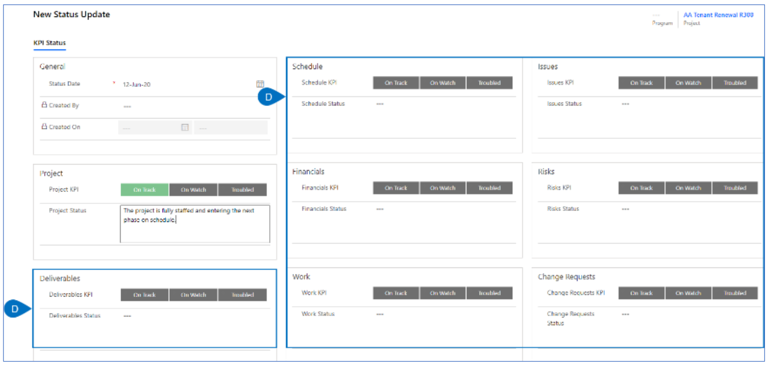
a. Open the **Status Updates** tab for the current program and click **+ New Status Update.**



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 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.



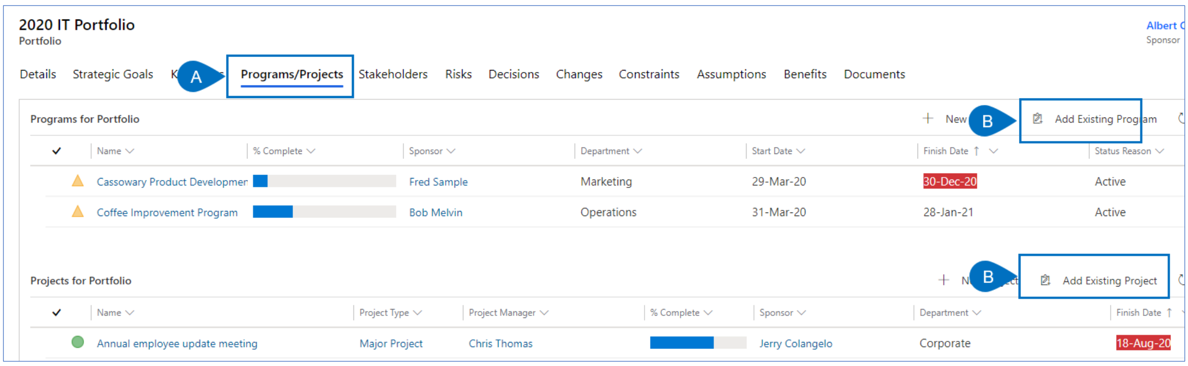
Adjusting the portfolio / program

Portfolio / Program Manager

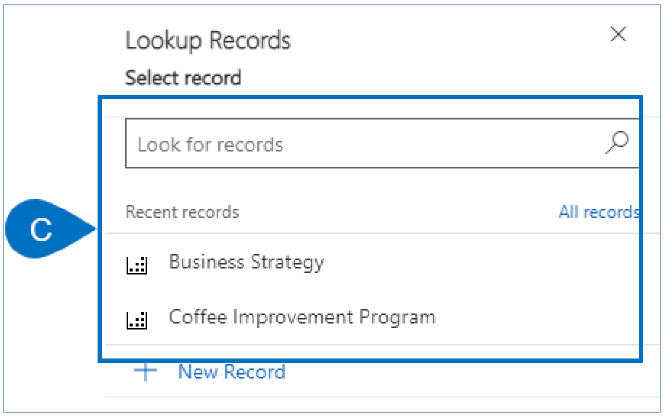
Portfolios – Programs/Projects tab

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.

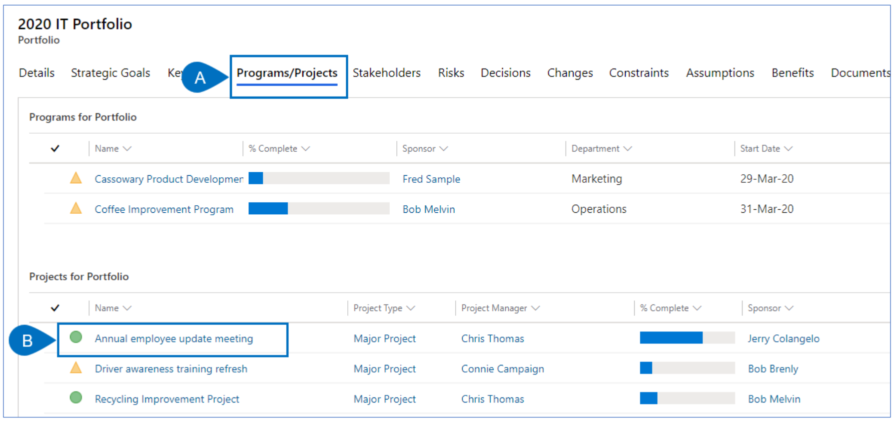


c. Search for and **select the appropriate program** (or project) from the list.



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).