Collaborating on Portfolio and Program Support Items

👤 Portfolio /Program Manager   🔧 Portfolios

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of the platform in the classroom. While the examples used herein may be different from (or not available) in your organisation's the platform instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the platform.

Please note the Job Aid for **Collaborating on Portfolio and Program Support Items** within the platform Learning compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

Lab Exercise 1.	Create an Issue
Lab Exercise 2.	Create a Risk
Lab Exercise 3.	Create a Decision
Lab Exercise 4.	Create a Change Request
Lab Exercise 5.	Create a Constraint
Lab Exercise 6.	Create an Assumption
Lab Exercise 7.	Create a Lesson Learned

1. Create an Issue

Set A

Name	Not all Executives Available
Status	Active
Priority	Medium
Due Date	Select a date from the date picker 🗓
Description	Many of the executive staff may take vacations during the time we will need them to review the benefits package.

Set B

Name	Employees Without Adequate Office Space
Status	Active
Priority	Medium
Due Date	Select a date from the date picker 🗓
Description	We have approximately 25% of our employees that do not have the space to dedicate to an office

2.Create a Risk

Set A

Name	New Benefits Package Cost
Status	Active
Description	New benefits package may cost more than originally planned
Cost	$150,000
Inherent Likelihood	Likely
Inherent Consequence	Moderate
Mitigation Plan	Moderate
Mitigation Plan	Deploy new benefits package in phases
Outcome	Reduce benefits
Due Date	Select a date from the date picker ▦

Set B

Name	Employees Without Adequate Office Space
Status	Active
Description	We have approximately 25% of our employees that do not have the space to dedicate to an office
Cost	$0.00
Inherent Likelihood	Likely
Inherent Consequence	Moderate
Mitigation Plan	Moderate
Mitigation Plan	Impacted employees will need to continue working from onsite facilities
Outcome	Reduce benefits
Due Date	Select a date from the date picker ▦

ALTUS

3.Create a Decision

Set A

Name	Allow Staff to Continue to Work from Home
Description	Due to current health situation and other factors, the executive team will allow work from home for most staff
Priority	Medium
Due Date	Select a date from the date picker 🗓
Escalation Required	Yes
Escalation Manager	Select your own name
Decision Date	Select a date from the date picker 🗓
Assigned To	Select your own name
Status	Active

Set B

Name	Deployment
Description	A decision was made to deploy the new technology in a phased approach as a cost saving measure and to allow the first phase to serve as the test to assist with updating process and job aides as needed before moving onto the remaining groups
Priority	Medium
Due Date	Select a date from the date picker 🗓
Escalation Required	Yes
Escalation Manager	Select your own name
Decision Date	Select a date from the date picker 🗓
Assigned To	Select your own name
Status	Accepted

4.Create a Change Request

Set A

Name	Add Work From Home
Description	Add work from home as a benefit
Driven By	Business
Implementation Date	Select a date from the date picker 📅
Priority	High
Work Effort Estimate (Hours)	0
Work Effort Details	There will be no work provided by company staff
Duration Estimate (Hours)	20
Duration Estimate Details	It will take some time to get hardware
Resource Impacts	None
Impact on Other Projects	None
Assumptions	Staff will be as, or more, productive working from home
Due Date	Select a date from the date picker 📅
Cost Estimate	$75,0000
Cost Estimate Details	Make network and VPN improvements

Set B

Name	Phased Deployment
Description	Instead of one large implementation, we are requesting to change the schedule to accommodate a phased implementation
Driven By	Business, IT, Vendor
Implementation Date	Select a date from the date picker 📅

Priority	High
Work Effort Estimate (Hours)	40
Work Effort Details	Time needed to revise the plan and have it reviewed and approved
Duration Estimate (Hours)	10
Duration Estimate Details	Time for research, presenting, and gaining approval
Resource Impacts	One project manager and all approvers
Impact on Other Projects	This will impact other projects as it will take longer than anticipated causing the schedule to overlap with other projects currently on the roadmap
Assumptions	None
Due Date	Select a date from the date picker 📅
Cost Estimate	1,000
Cost Estimate Details	Labour

5.Create a Constraint

Set A

Name   Cost of Employee Benefit Package

Description   The cost of Employee Benefits in relation to total compensation

Category   Legal

Set B

Name   Blackout Periods

Description   Blackout Periods

Category   Financial

6.Create an Assumption

Set A

Name   Staff Will Be Satisfied With Benefits

Description   Benefits package will retain staff members

Category   Technology

Set B

Name   All Employees Can Work Remotely

Description   All employees can work remotely

Category   Technology

7. Create a Lesson Learned

Set A

Name	Participation in Survey
Category	Cost
Observation	Participation in surveys is usually not very good
Recommendation	Offer gifts for filling out survey
Lesson Learned	Staff is more likely to participate if there is something in it for them
Action Taken	Offered gift cards to participants

Set B

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