Understanding Portfolio/Program Status

👤 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 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 **Understanding Portfolio and Program Status** within the Learning section compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

Lab Exercise 1.   Setting Program KPIs and Composing Status Narratives

1. Setting Program KPIs and Composing Status Narratives

Set A

General

Status Date	Select the last day of the previous month from the date picker 📅
Project Status	Program has been approved and projects are being ramped up
Project KPI	On Track

KPI Breakdown

Deliverables KPI	On Track
Deliverables Status	Deliverables should be identified within the next 2 weeks
Schedule KPI	On Track
Schedule Status	Early stage of the program
Work KPI	On Track
Work Status	Detailed schedules under development
Financials KPI	On Track
Financials Status	Negotiation continues with the executive team to secure the needed funding for this program
Issues KPI	On Track
Issues Status	No issues yet
Risks KPI	On Track
Risks Status	Risks are being identified and categorised
Change Requests KPI	On Track
Change Requests Status	None to date

Set A

General

Status Date	Select the last day of the previous month from the date picker 📅
Project Status	This program is on watch due to a couple of budgeting delays and physical constraints.
Project KPI	On Watch

KPI Breakdown

Deliverables KPI	On Watch
Deliverables Status	Some priority deliverables are overdue.
Schedule KPI	Troubled
Schedule Status	Schedule is not on target.
Work KPI	On Watch
Work Status	Detailed schedules under review.
Financials KPI	On Watch
Financials Status	Cost overrun is being resolved with the finance department.
Issues KPI	On Watch
Issues Status	High priority issues have been identified.
Risks KPI	On Track
Risks Status	No outstanding risks in the current period.
Change Requests KPI	On Watch
Change Requests Status	Pending change requests are awaiting approval.

Set B

General

Status Date	Select the last day of the previous month from the date picker 📅
Project Status	Tracking as planned with some cost variance.
Project KPI	On Track

KPI Breakdown

Deliverables KPI	On Track
Deliverables Status	Tracking as planned
Schedule KPI	On Track
Schedule Status	Tracking as planned
Work KPI	On Track
Work Status	Tracking as planned
Financials KPI	On Track
Financials Status	Tracking as planned
Issues KPI	On Track
Issues Status	Tracking as planned
Risks KPI	On Track
Risks Status	Tracking as planned
Change Requests KPI	On Track
Change Requests Status	Tracking as planned

Set B

General

Status Date	Select the last day of the previous month from the date picker 🗓
Project Status	We continue to reduce scope to meet the budget and are close to getting back on track with a modified approach.
Project KPI	On Watch

KPI Breakdown

Deliverables KPI	On Watch
Deliverables Status	Deliverables are currently being reviewed.
Schedule KPI	On Watch
Schedule Status	Schedule variance is currently being reviewed.

Work KPI	On Watch
Work Status	Schedule Work variance is currently being reviewed.
Financials KPI	On Watch
Financials Status	Cost variance is currently being reviewed.
Issues KPI	On Track
Issues Status	Tracking as planned
Risks KPI	On Track
Risks Status	Tracking as planned
Change Requests KPI	On Track
Change Requests Status	Tracking as planned