Demand Reporting Options

Quick Reference Guide

# Overview and PMO Dashboard

Overview

As a demand manager, there are several OOTB reports that can be utilized to help with the demand assessment process.

PMO Dashboard

Investment Portal

PMO Dashboard

The PMO Dashboard can be accessed by selecting **Self-Service > Dashboards** from the left-hand navigation and then choosing the PMO Dashboard.

The dashboard uses Performance Analytics to provide a trend of historical data as well as regular reports. It gives an overview of your investments, provides a pipeline view of upcoming intake and a calendar view of upcoming dates. It can be filtered by Business Unit, Portfolio, Portfolio Manager, Program, or Program Manager. The Pipeline and Data Quality tabs are most beneficial for Demand Managers.
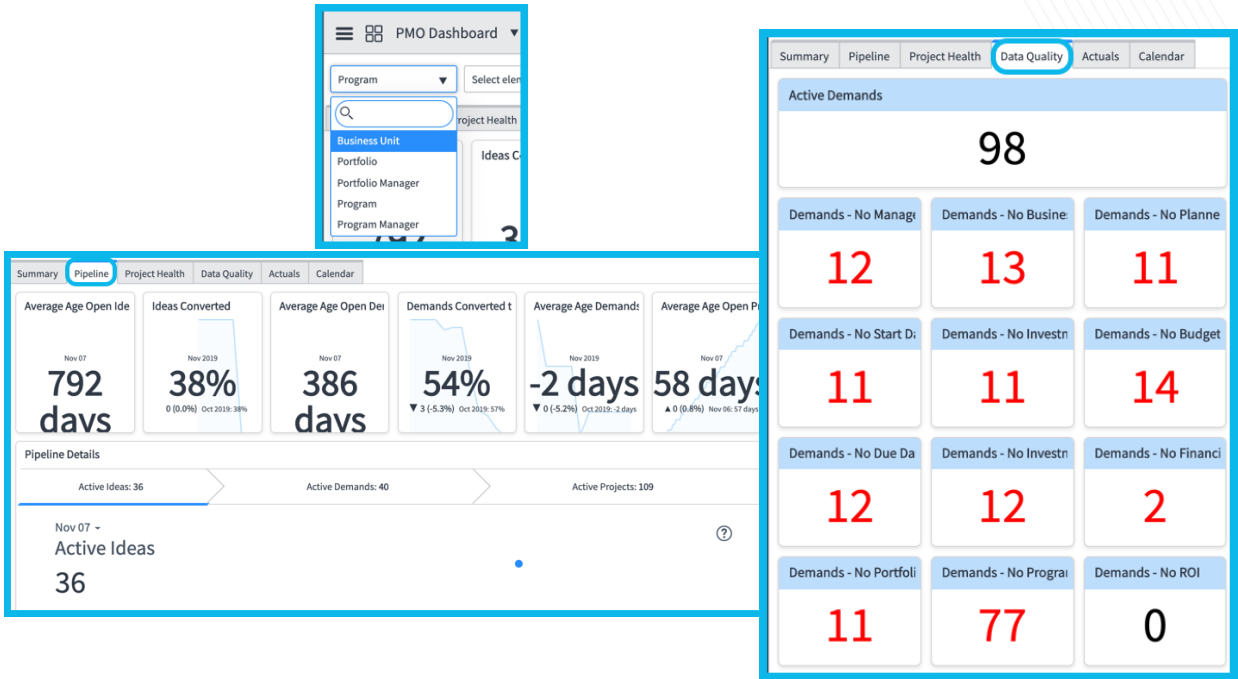
Investment Portal

Investment Portal

The Investment Portal gives you a comprehensive view of project and demand financials, deadlines, and other important metrics in an intuitive user interface that makes project and demand management more efficient. You can create an investment board through filter definition and share it with other stakeholders. Filtering makes it easy to surface information on the fly and for reporting.

Investment boards can be edited, copied, deleted, bookmarked, and shared with other members and groups.

The Investment Widgets on top provide a quick view into important metrics, such as total cost, actual cost, and budget. These widgets can be configured per investment board.

The tabs on bottom provide more in-depth details:

1. **Overview** – Summary details on demand and project form fields

2. **Timeline** – Provides details on key project milestones in a Gantt view.

3. **Financials** – Provides a detailed breakdown of project and demand costs based on cost plans associated to projects and demands.

The widgets on top and columns on the bottom can also be configured to meet your needs. To access the Investment Portal, just enter **Investment Portal** in the left-hand navigation.
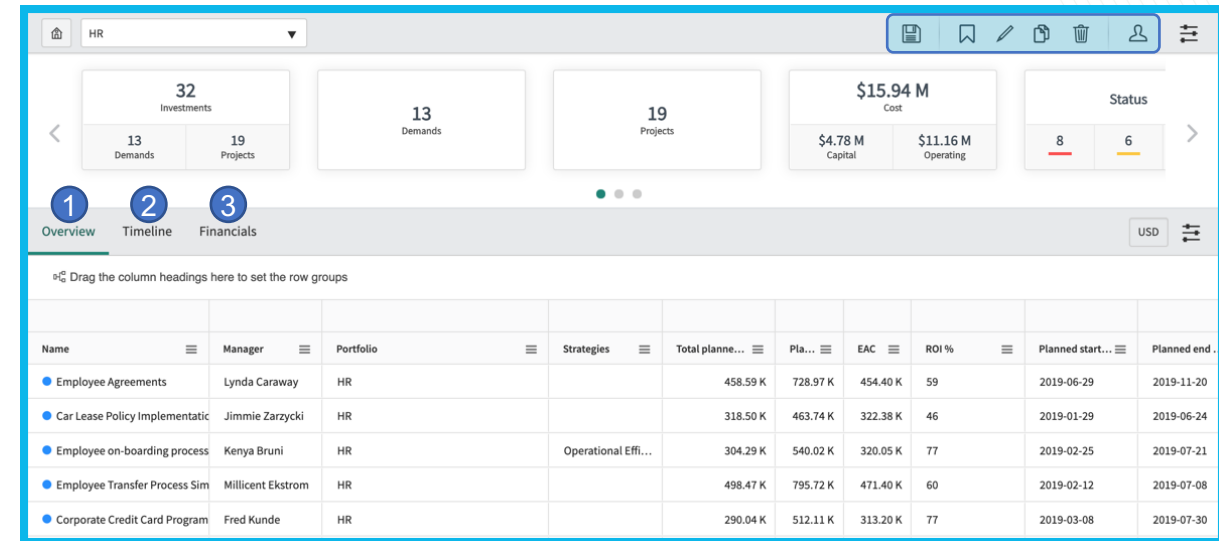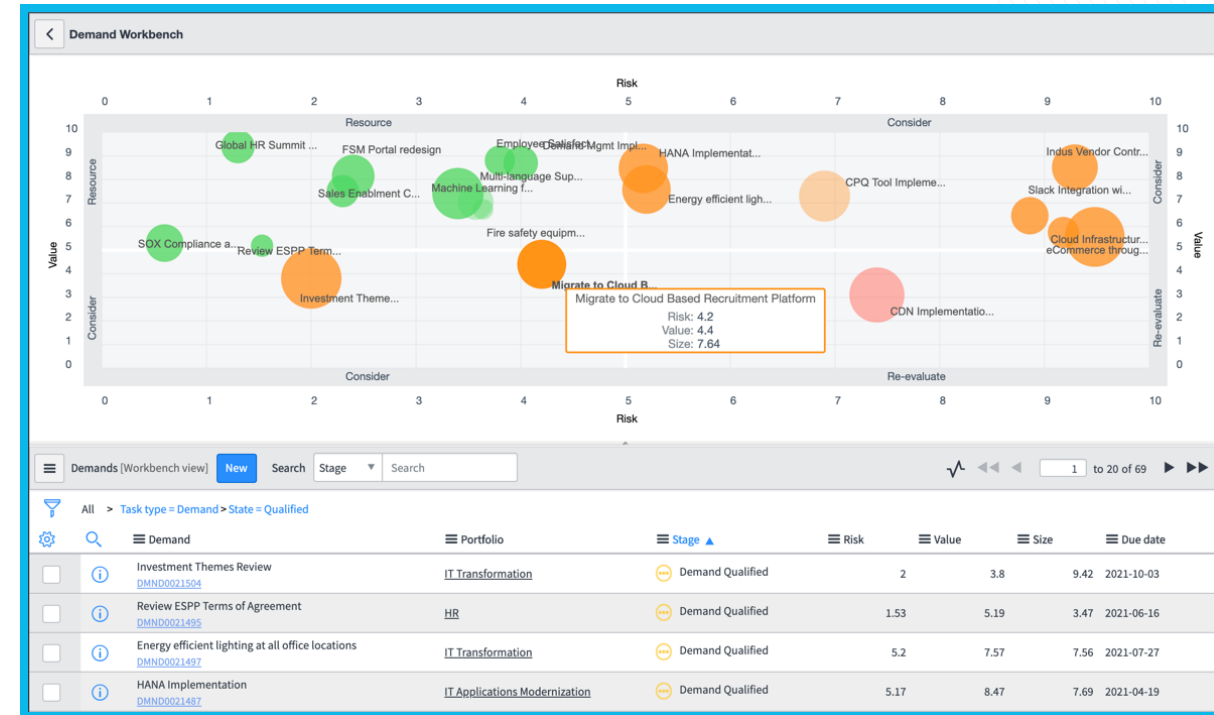
Demand Workbench

Demand Workbench

The demand workbench provides a central location for viewing and assessing business demands, and makes it easy to manage demands by presenting multiple interactive views of demand information on one page. The workbench is split into two panes: the top pane presents an interactive bubble chart for assessing demands and the bottom pane displays the demand details in a list view.

By default, the workbench displays demands **screened by stakeholders** or **qualified by the demand manager**. With the Demand Manager role, you can use the workbench to:

- View, evaluate, and update demands

- Create demands

- Create artifacts from demands, including projects, enhancements, changes, and defects

To access the Demand Workbench enter **Demand Workbench** in the left-hand navigation.

Demand Workbench

Roadmap

- The Roadmap can be accessed by entering Roadmap in the left-hand navigation and selecting **Demand > Roadmap**.

- The Roadmap is a Timeline Visualization that shows all **Demands by due date** segregated by Portfolio. The timeline visualizations come in two varieties:

1. A printable two-dimensional (2D) view where activities are grouped by month.

2. A three-dimensional (3D) view where activities are grouped in lanes.