

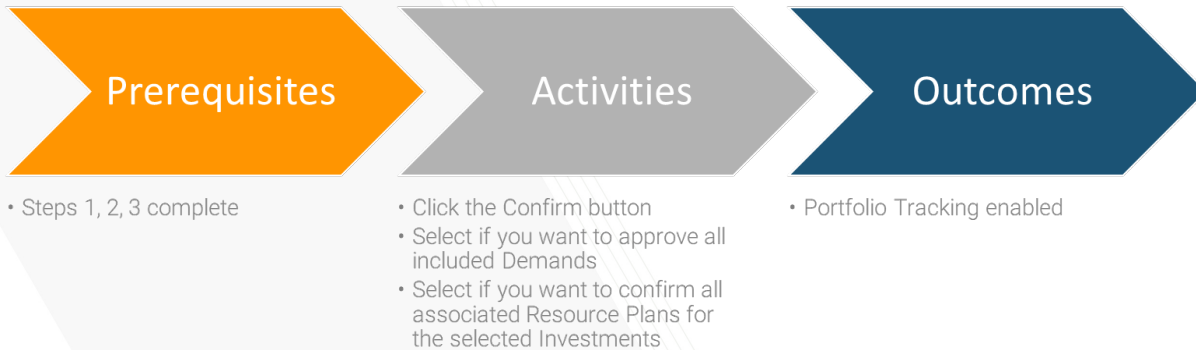


# Step 2c – Confirming the Portfolio

Quick Reference Guide

# Confirming the Portfolio

The Workflow for Step 4 of the Portfolio Management process is as follows:



When confirming a Portfolio, there are a few options that need to be considered. Below is a summary of the options and the impacts.

## Approve All Selected Demands

This option appears when the Confirm button is used (see next page). When selected, the system will automatically change the state of all Demands with the Planning flag as true. This is recommended if you have quite a few Demands and saves the manual effort to change the state for each.

## Confirm Resources for Selected Demands and Projects

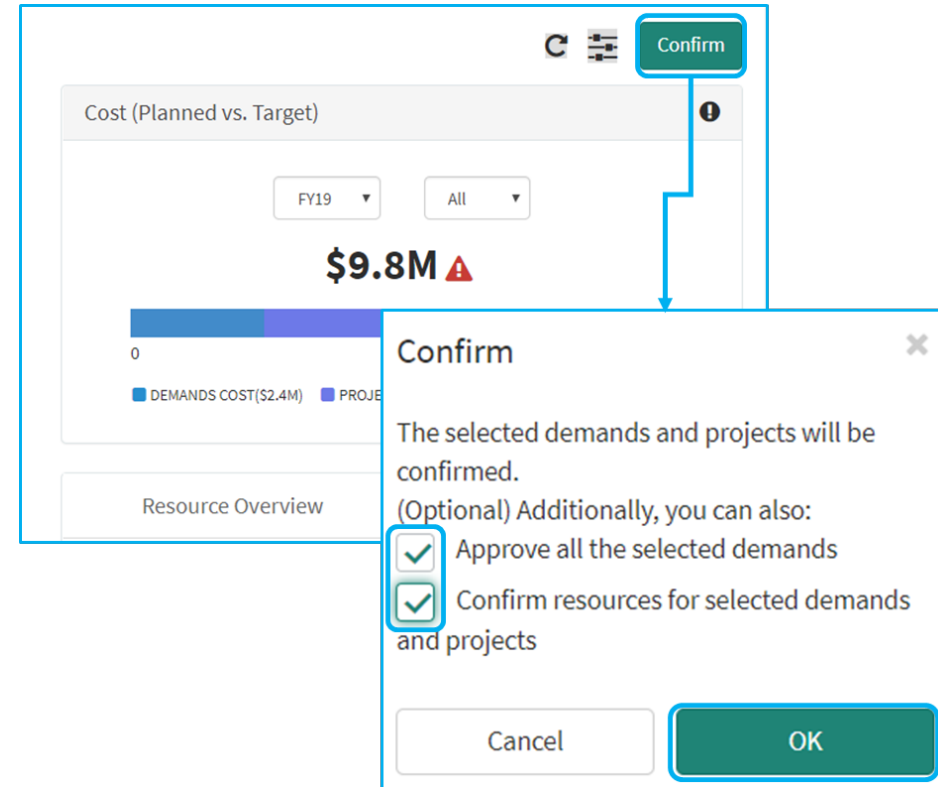
This option appears when the Confirm button is used (see next page). When selected, the system will confirm all Resource Plans of the selected Demands and Projects of the Portfolio. It is not recommended that this feature be used as the system assigns resources automatically. Assignment of resources should be done when the project is ready for staffing and be done through the Allocation Workbench

## Create Project(s) on Confirming Demands from Portfolio Workbench

This option is a system setting configured under the Preferences – Project navigation item. When set to true, Projects are automatically created when the Demands are approved through the Approve Demands selection outlined above. It is not recommended that this is used as Projects should not be created from a Demand until it is ready to begin execution.

# Confirming the Portfolio

Once Demands and Projects have been selected for execution and all planned, budget and target amounts have been updated, the Portfolio is ready to be **confirmed**. In order to do this, click the **Confirm** button and make the appropriate selections.



# Confirming the Portfolio

Once complete, the Portfolio is ready for tracking and the **Track Portfolio** link appears on the first page of the Portfolio Workbench.

Fiscal Year

Select the fiscal Year to Plan

FY20

Planning Steps

1

2

Step 1: Revise Target

\$3.5M

Step 2: Select Demands and Projects

\$2.7M

Customer Engagement

Number	Short description	Priority	Selected for execution
PRJ0010194	Collaboration & Team Feedback	1 - Critical	✓
DMND0001101	Tableau reporting implementation	2 - High	✓
DMND0021468	e-signature Implementation for Employee Managed Documents	2 - High	✓
DMND0021460	eCommerce through Mobile	3 - Moderate	✓
DMND0021472	Self-service Customer Portal	3 - Moderate	✓
PRJ0010061	Idea pipeline management	4 - Low	✓

Rows 1 - 6 of 6

Track Portfolio

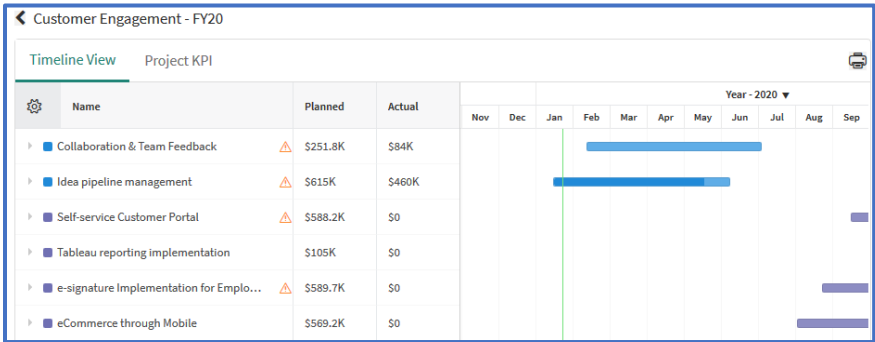
Legend

Selected for execution for the selected financial year

Not selected for execution for selected financial year

## Track Portfolio View

The Track Portfolio View looks slightly different than the **Step 2** portfolio view. On the left, the **Timeline View** shows a column and GANTT view of the **confirmed** investments in the Portfolio.



# Confirming the Portfolio

The Project KPI view shows Red-Yellow-Green from the most recent status reports of the Projects in the portfolio. You can click on the Project name to go to the most recent status report, and you can hover over any of the icons to see the detail that was entered by the project manager.

The graphs on the right show up-to-date portfolio level information on Costs, Resources, and Risks/ Issues/ Changes.

**Note:** It is recommended to use the **Investment Portal** to track portfolio progress and status. The Investment Portal is much more comprehensive and customizable as compared to the Track Portfolio views in the Portfolio Workbench.

Timeline ViewProject KPI

Name	Overall	Schedule	Cost	Resources	Scope
Collaboration & Team Feedback	!	✓	⚠	✓	✓
Idea pipeline management	!	!	!	!	!

The cost has escalated due to increased scope. Reducing the scope of work will help reduce the cost and be within budget.

