

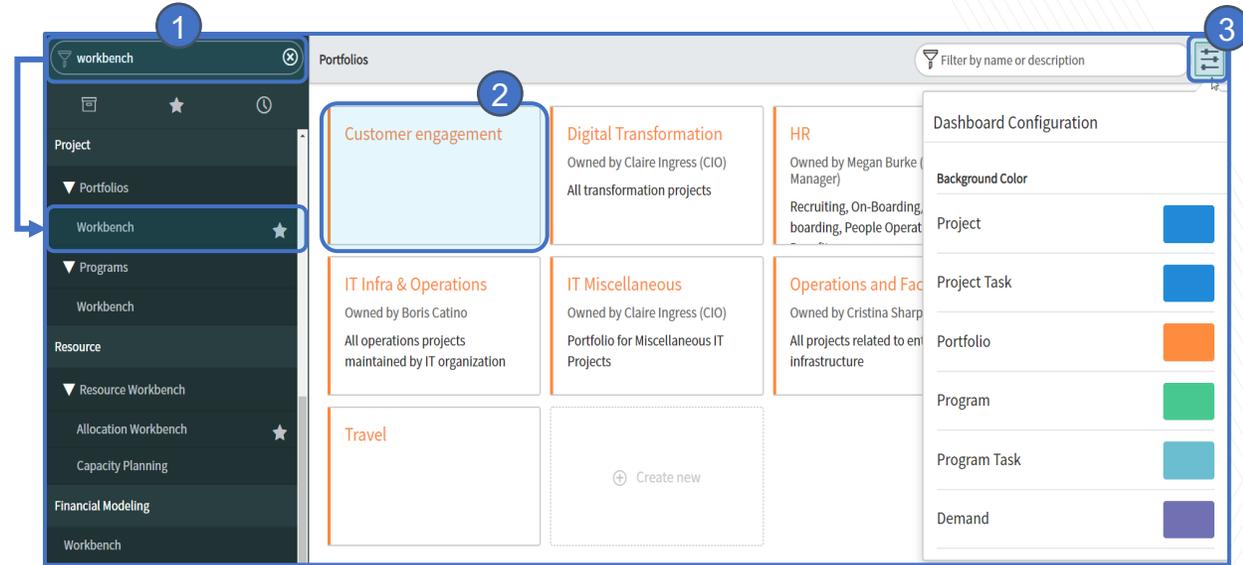


Portfolio Workbench Overview

Quick Reference Guide

Portfolio Workbench Overview

1. In the Application navigator, enter **Workbench** and follow the path **Project> Portfolio** to select Portfolio Workbench.
2. You will see a card of all the available Portfolios to view.
3. In the top right, click the configuration icon to select the colors for projects, tasks, Portfolios, and so on. The workbench uses these colors to display the items in the Portfolio in the Gantt chart in timeline view.



Portfolio Workbench Overview

Upon opening a Portfolio **that has not been planned** yet for the displayed fiscal year, you will see the following screen:

The screenshot shows the Portfolio Workbench interface for a portfolio that has not been planned for the current fiscal year. The interface is divided into several sections:

- Fiscal Year:** A dropdown menu showing 'FY20'. A callout box points to this section with the text: "Current Fiscal Year being viewed".
- Planning Steps:** A progress indicator showing two steps. Step 1 is 'Set Target' and Step 2 is 'Select Demands and Projects'. A callout box points to this section with the text: "The two Planning Steps for the Portfolio and the progress thus far."
- Customer Engagement Table:** A table listing demands and projects. A callout box points to this table with the text: "List of demands and projects included in the Portfolio for the fiscal year. **Expected start and due dates must be populated and demand must be approved or qualified.**"
- Legend:** A legend indicating that a green checkmark means 'Selected for execution for the selected financial year' and a grey checkmark means 'Not selected for execution for selected financial year'. A callout box points to this legend with the text: "In order to track a portfolio, complete Planning Steps 1 and 2."
- Message:** A message at the top right of the table area states: "Complete the two steps to start tracking portfolio".

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

Portfolio Workbench Overview

Below is an overview of **Step 2** when planning the portfolio for the current fiscal year:

The screenshot shows the 'Customer Engagement - FY20' interface. It includes a list of demands and projects on the left, a central table with columns for Name, Planned, Priority, and months (Jul-Mar), and two charts on the right: 'Cost (Planned vs. Target)' and 'Resource Overview'. Callouts provide detailed explanations of these elements.

- Current Fiscal Year being viewed**: Points to the 'FY20' dropdown in the top left.
- Ranking and sorting options**: Points to the 'Rank By Score' dropdown in the top center.
- Cost Graph representing planned costs for all selected investments as compared to the portfolio target**: Points to the 'Cost (Planned vs. Target)' chart, which shows a planned cost of \$2.7M against a target of \$3.5M.
- List of demands and projects included in the Portfolio**: Points to the list on the left, including items like 'Collaboration & Team Feedback', 'Idea pipeline management', and 'Self-service Customer Portal'.
- Check/ Uncheck boxes to include/exclude investments from the portfolio for the fiscal year**: Points to the checkboxes in the list.
- Resource histogram and % Utilization Chart representing requested, confirmed, allocated resource plans for selected investments**: Points to the 'Resource Overview' chart, which shows utilization across four fiscal periods (FY20-Q1 to Q4) with categories for Requested, Confirmed, and Allocated resources.

Portfolio Workbench Overview

Upon opening a Portfolio that **has been planned** for the displayed fiscal year, you will see the following screen:

The screenshot shows the Portfolio Workbench interface for a 'Customer Engagement' portfolio. It includes a 'Fiscal Year' selector set to 'FY20', a 'Planning Steps' section with two completed steps, a table of demands and projects, and a 'Track Portfolio' button. Callouts provide context for these elements.

Callout 1: Current Fiscal Year being viewed (points to the Fiscal Year dropdown)

Callout 2: Opens the Track Portfolio view to monitor the progress of the portfolio (points to the Track Portfolio button)

Callout 3: List of demands and projects included in the Portfolio for the fiscal year. Green checkmarks indicate the investment has been selected (approved) for execution for the displayed fiscal year. (points to the table)

Callout 4: The two Planning Steps for the Portfolio and progress thus far (points to the Planning Steps section)

| 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

Legend:
✓ Selected for execution for the selected financial year
⊘ Not selected for execution for selected financial year

Portfolio Workbench Overview

Below is the **Track Portfolio** view (accessible once Step 2 is completed):

Timeline and Project KPI (status report) views

Cost and Resource tracking summaries, as well as a Risk/ Issue/ Change list

List of approved (confirmed) investments

Detail columns and GANTT for selected investments

| Name | Planned | Actual | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct |
|--|----------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Collaboration & Team Feedback | \$251.8K | \$84K | | | | | | | | | | | | |
| Idea pipeline management | \$615K | \$460K | | | | | | | | | | | | |
| Self-service Customer Portal | \$588.2K | \$0 | | | | | | | | | | | | |
| Tableau reporting implementation | \$105K | \$0 | | | | | | | | | | | | |
| e-signature Implementation for Employee... | \$589.7K | \$0 | | | | | | | | | | | | |
| eCommerce through Mobile | \$569.2K | \$0 | | | | | | | | | | | | |

Cost (Planned vs. Actual)

Resource (Allocated vs. Actual)

Risks Issues Changes

| Short description | Priority |
|-----------------------|----------|
| May need External SME | 4 - Low |