Portfolio Workbench Overview

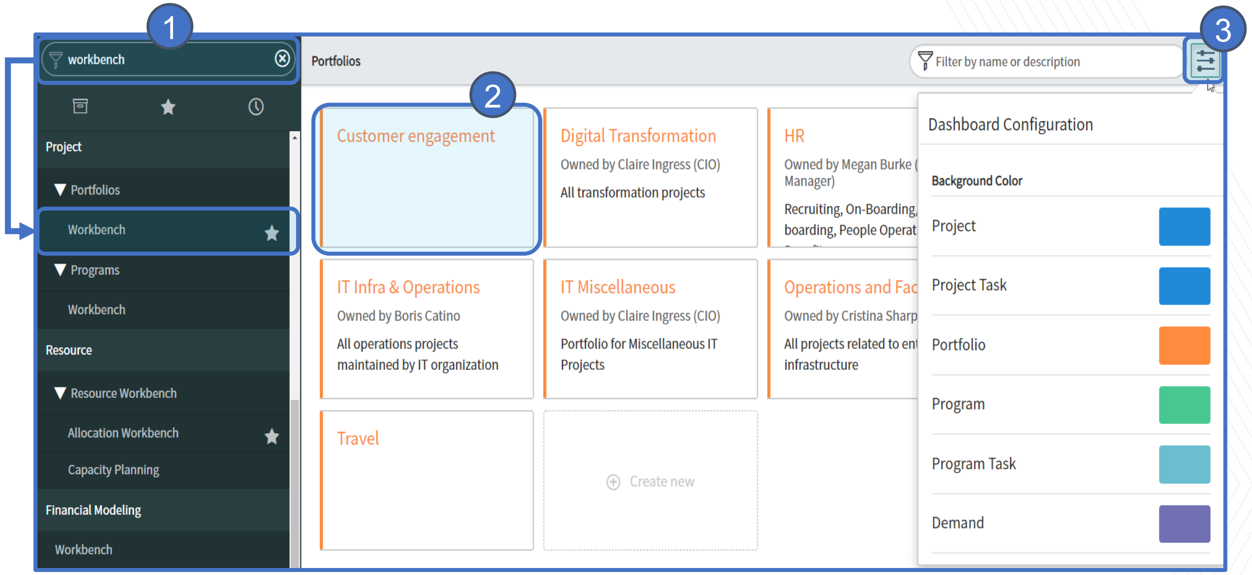
Quick Reference Guide

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.

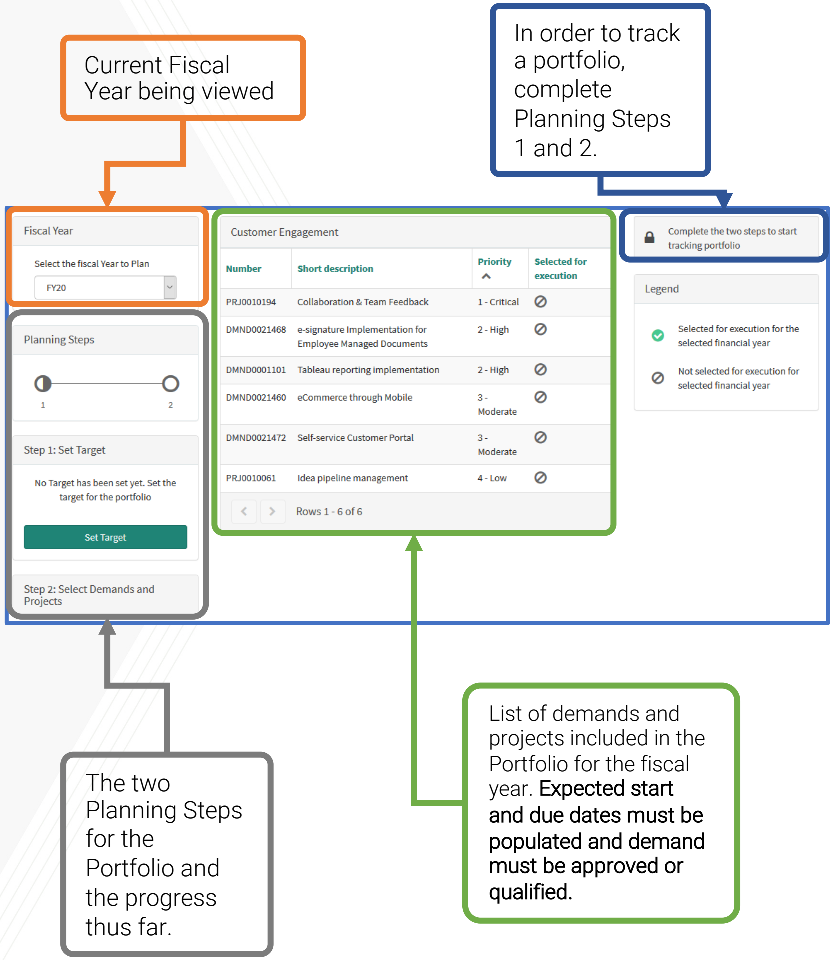
3. In the top right, click the configuration icon to select the colors for projects, tasks, Portfolios, and so on. The workbench uses these colors to display the items in the Portfolio in the Gantt chart in timeline view.



Georgia Tech
CREATING THE NEXT

Portfolio Workbench Overview

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



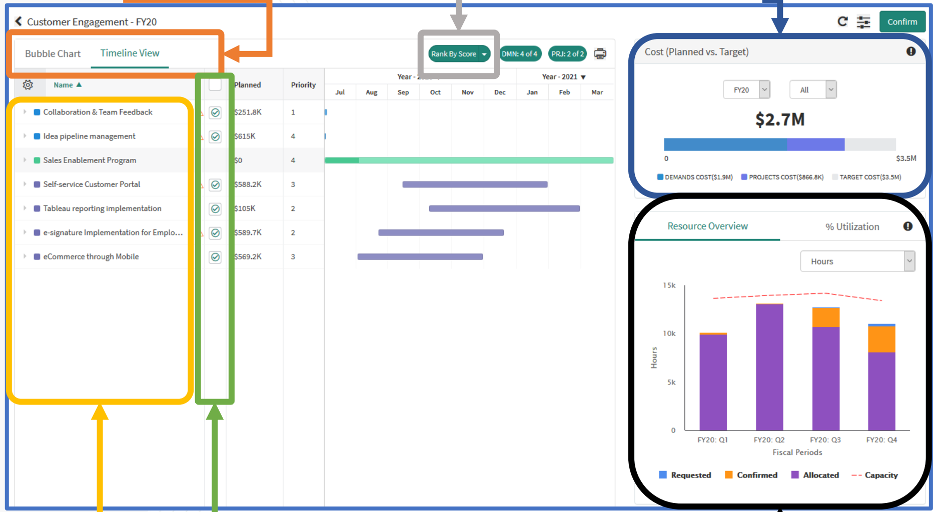
Portfolio Workbench Overview

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

Current Fiscal Year being viewed

Ranking and sorting options

Cost Graph representing planned costs for all selected investments as compared to the portfolio target



List of demands and projects included in the Portfolio

Check/ Uncheck boxes to include/exclude investments from the portfolio for the fiscal year

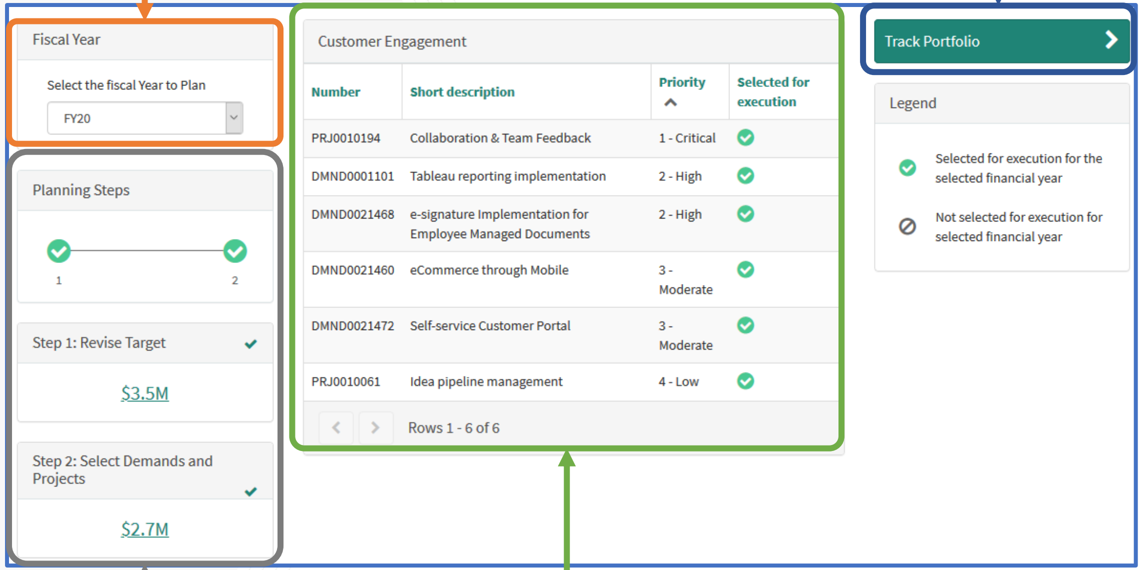
Resource histogram and % Utilization Chart representing requested, confirmed, allocated resource plans for selected investments

Portfolio Workbench Overview

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

Current Fiscal Year being viewed

Opens the Track Portfolio view to monitor the progress of the portfolio



The two Planning Steps for the Portfolio and progress thus far

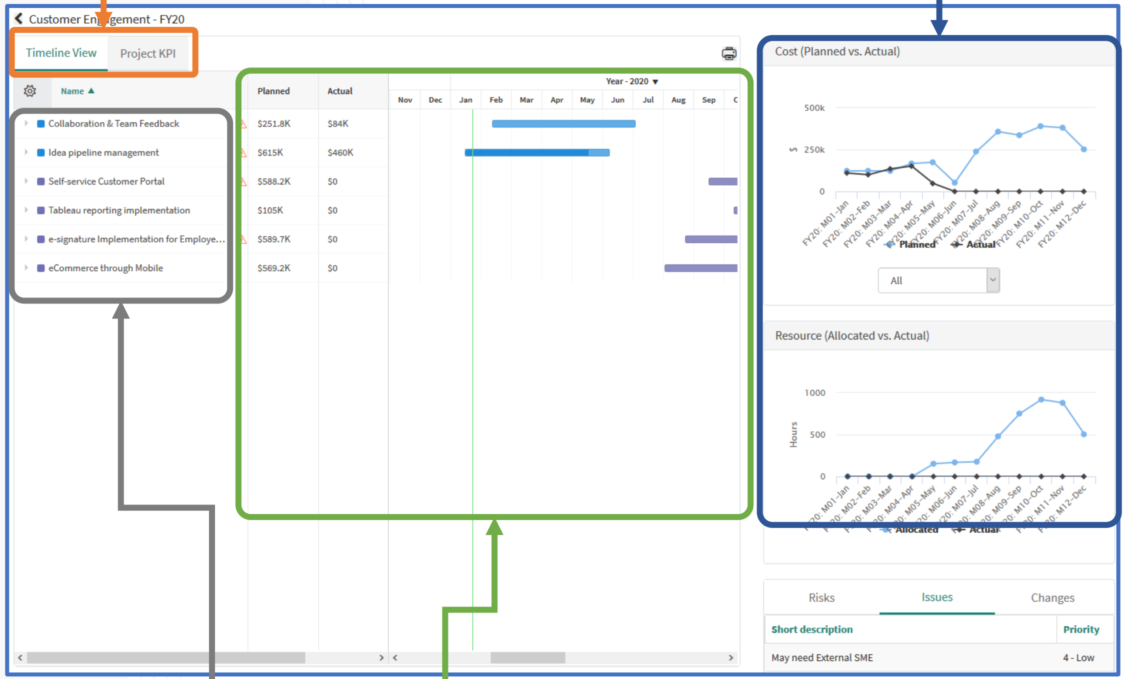
List of demands and projects included in the Portfolio for the fiscal year. Green checkmarks indicate the investment has been selected (approved) for execution for the displayed fiscal year.

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

Georgia Tech
CREATING THE NEXT