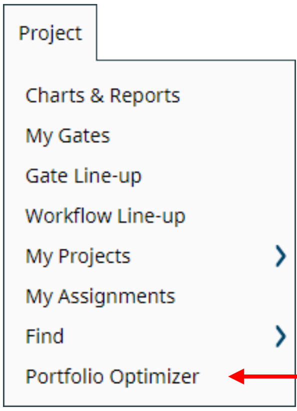
Accolade Portfolio Optimization Quick Reference

Accessing Portfolio Optimizer



Install and start Portfolio Optimizer directly from Accolade if you run Microsoft Edge, Microsoft Internet Explorer, or Google Chrome with the Click Once add-in installed.

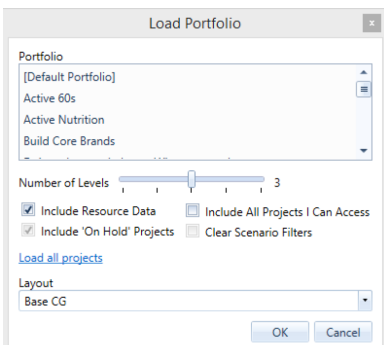
Or start Portfolio Optimizer from the Windows **Start** menu after it is installed.

Loading Data into Portfolio Optimizer

Portfolio - The current, live data for projects in Accolade.

Scenario - A saved copy, like a snapshot, of portfolio data.

Your user rights determine what type of data you can load into Portfolio Optimizer

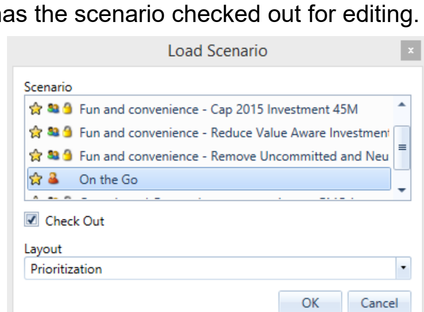


Loading Portfolio Data

1. From the **File** menu, select **Load from Server > Portfolio**.
2. Select the portfolio.
3. For single project portfolios, select the level within the portfolio hierarchy to load.
4. Select the data to include.
5. Select the screen layout to apply.
6. Click **OK**.

Loading Scenario Data

1. From the **File** menu, select **Load from Server > Scenario**.
2. Select the scenario to load.
   - Scenarios that only you and selected editors can load.
   - Shared scenarios that all users with Load Scenario rights can load.
   - Another user has the scenario checked out for editing.

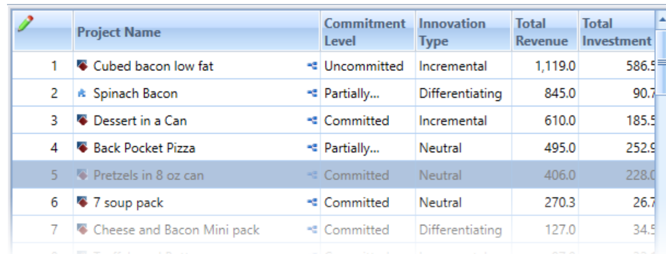


3. To modify the scenario and save it with the same name, select the **Check Out** check box.
4. Select the screen layout to apply.
5. Click **OK**.

Portfolio Optimizer Components

Project Grid

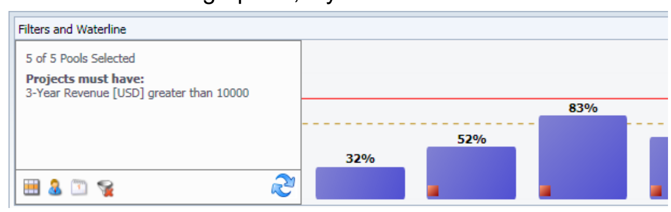
Projects available in the loaded portfolio or scenario.



- Click to edit the project information.

Filters and Waterlines

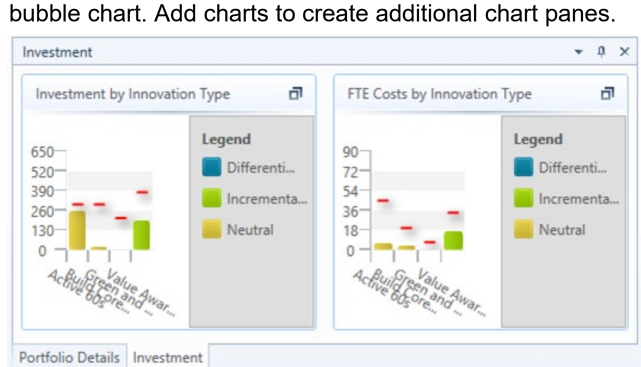
The list of applied filters, buttons to access filter options, and resource demand graphics, if you load resource data.



- Filter the projects displayed.
- Refine the resource pools displayed.
- Refine the resource demands displayed by date.
- Remove all selected filters.
- Refreshes resource calculations.

Charts and Reports

One or more panes that contains a chart, such as a pie chart or bubble chart. Add charts to create additional chart panes.



Other Panes

Portfolio Details - Displays information about the portfolio. Use this pane to enter or update a portfolio description that is saved with the portfolio when you save as a scenario.

Project Details - Displays project, demand, and project link information for the currently selected project in the project grid.

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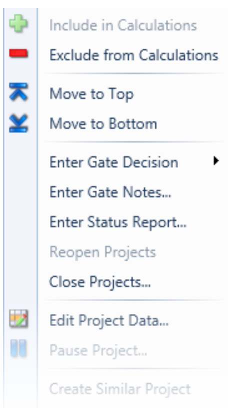
Updating Project Data

Selecting Metrics to Display in the Project Grid

- From the **View** menu, select **Columns**.
- Right-click the header row in the project grid and choose **Select Columns**.
- Use the other filters shown on the other side of this card under **Filters and Waterlines**.

Entering Gate Decisions, Notes, and Status Reports



Right-click a project row to access additional options to:

- Enter gate decisions and notes.
- Enter a project status report.
- Close or reopen a project.
- Access a single project's details

Showing Column Totals

1. From the **View** menu, select **Show Totals**.

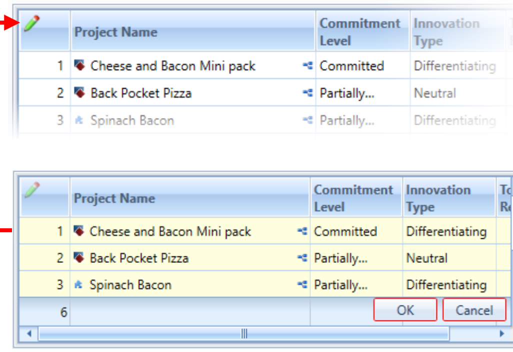
The project count includes active, visible projects, those that are not crossed or grayed out, and projects not filtered out, on hold, or canceled.

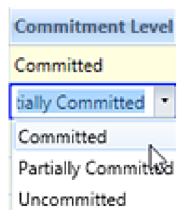
Freezing Columns for Horizontal Scrolling

Right-click the heading row of the data column in the grid and select **Freeze Scroll Here**. The selected column and all the columns to the left are frozen.

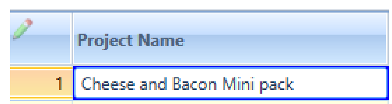
Editing Project Metrics and Metadata Details

Click to place the project grid in edit mode.





Click in a field to enter text or to access list options. Work left to right in the grid if your company uses cascading metrics.



Make changes and click **OK** to exit edit mode.

Project Grid Navigation Shortcut Keys

Arrow key in any direction - Moves focus one cell.

CTRL+HOME - Moves cell focus to upper left cell.

CTRL+SHIFT+arrow key - Moves focus to first or last cell in the column or row.

CTRL+A - Selects all cells in the project grid.

CTRL+click - Selects a row.

SHIFT+click two rows - Selects a block of rows.

CTRL+scrolling the mouse wheel - Zooms in or out.

CTRL+plus key - Zooms in.

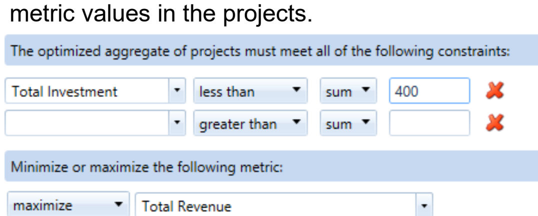
CTRL+minus/dash key - Zooms out.

CTRL+0 - Returns zoom to 100%.

CTRL+Z - Undoes the last edits made.

Optimizing Scenarios

1. *(Optional)* Filter the projects to optimize, or right click a project and select **Require in Optimization** to ensure the project is included, or **Exclude from Calculations** to remove the project from the optimization.
2. From the **Edit** menu, select **Optimize**.
3. Select the criteria a project must meet to be included in the optimized set of projects.
4. Enter a value to compare to the sum or average of the metric values in the projects.



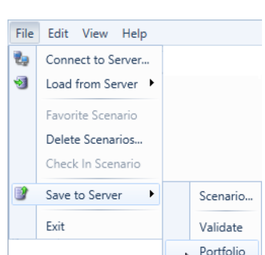
5. Select whether to minimize or maximize the selected piece of data.
6. Click **OK** to begin the optimization.

Saving Scenarios and Committing Data

Saving Scenarios

You must have Save Scenario rights to save a scenario

1. From the **File** menu, select **Save to Server > Scenario**.
2. Provide a name that identifies the use and the data provided in the scenario.
3. Select users that can modify or delete the scenario and click ➕ to add their name to the list.
4. Select the **Share with other users** check box to make this scenario available to other users with Load Scenario rights to Portfolio Optimizer.
5. Click **OK** to save the scenario.



Committing Data to Accolade

You must have Save Portfolio rights to save updates to Accolade.

1. From the **File** menu, select **Save to Server > Portfolio**.