📋 Portfolio — From Request to Delivery

Kadratis Cheat Sheet

Request → Analyze & Score → Approve → Project → Deliver

① Submit a Request

Portfolio → Requests → + New Request

Field	What to enter	Example
Name	Clear, concise title	CRM Migration
Source	Where it came from	Sales department
Category	Type of initiative	New Application
Requestor	Who is asking	Jane Doe
Target Delivery Date	When is this needed?	2026-06-01

Summary tab: use the managed **Purpose** document to explain the need and expected outcome.

> 💡 Keep it lean — deeper analysis, linked knowledge, and supporting evidence can come later. The goal is to get the request into governed intake. New requests start in **Pending Review**.

② Analyze & Score

Open request → work across the **Analysis** and **Scoring** tabs

Analysis

Capture **Impacted Business Processes**, a 7-dimension **Feasibility Review**, **Risks & Mitigations**, and the formal **Analysis Recommendation**.

Feasibility (7 dimensions)

Technical Feasibility · Integration & Compatibility · Infrastructure Needs · Security & Compliance · Resource & Skills · Delivery Constraints · Change Management.

Scoring

Weighted priority criteria are configured in **Portfolio → Settings**. Kadratis calculates the score automatically, and some tenants use mandatory bypass for must-do work.

Analysis Recommendation: a short verdict that is published into **Activity** as the formal decision record.

> ⚠️ **Don't score alone.** Committee: IT Functional + IT Technical + Cybersecurity + Business. One person's score = opinion. A committee's score = decision framework.

③ Approve & Convert

- Review scoring, feasibility, and the recommendation
- Use **Candidate**, **On Hold**, or **Rejected** while the request is still under review
- Set status to **Approved** when it is ready for delivery
- Click **Convert to Project** and confirm name, planned dates, and starting effort

> 💡 Transparent scoring means you can answer "why was my request rejected?" with data, not opinions.

④ Set Up the Project

Open project from **Portfolio → Projects**

Project Properties sidebar

Role	Purpose
Business Sponsor	Accountable for business outcomes
IT Sponsor	Removes delivery blockers and backs the initiative
IT Lead	Drives IT delivery
Business Lead	Drives business readiness & adoption
IT / Business Contributors	Team members doing the work

> ⚠️ Contributors must be set up in **Portfolio → Contributors** with team, availability (days/month), and skills. Without this, capacity planning and roadmap generation won't work.

Progress tab: validate IT Effort (MD) + Business Effort (MD), then allocate work across the team.

Timeline tab: Apply a Phase Template for instant scaffolding, or set dates manually.

Summary / Activity: keep the overall project picture and decision trail visible while the sidebar stays available.

⑤ Track Execution

Progress & Status

- **Execution Progress** slider (0–100%) on Progress tab
- Typical flow: Waiting List / Planned → In Progress → In Testing → Done (also: On Hold, Cancelled)

Time Logging

Progress tab (overhead) + **Tasks** (task-specific time).

> ⚠️ **Time logging powers the roadmap.** Logged time → historical capacity → accurate scheduling. Without it, you're guessing. Log weekly, even rough entries.

⑥ Structure (Advanced)

Phases — logical stages (Analysis, Dev, Test, Deploy). Use templates or create manually.

Tasks — assignable work items with priority, due date, time logging.

Milestones — key checkpoints visible on timeline and reports.

> 💡 Start simple. Add structure only when the project needs it.

The Bigger Picture

Automatic Roadmap — Effort estimates + contributor availability + historical time data = auto-scheduled project timeline. No more manual Gantt charts.

Capacity Heatmaps — See who's overloaded and who has bandwidth, across teams and time periods. Prevents the "5 projects at 100%" trap.

Bottleneck Analysis — When projects compete for the same people or skills, Kadratis highlights it before it becomes a crisis.

Executive Reporting — Scores, status, progress, budget, and timeline roll up into portfolio-level dashboards. No PowerPoint needed.

Quick Reference

I want to…	Go to…
Submit a new idea	Portfolio → Requests → + New
Score a request	Open request → Analysis + Scoring
Set the project team	Open project → Project Properties sidebar → Team
See the project pipeline	Portfolio → Planning
Check team capacity	Portfolio → Planning → Capacity view
Log time on a project	Open project → Progress tab or Tasks
Generate a roadmap	Portfolio → Planning → Generate
View reports	Portfolio → Reporting
Configure scoring weights	Portfolio → Settings
Set up contributors	Portfolio → Contributors