

Overview

This Job Aid defines the steps to follow for creating and maintaining Ideas in Sensei IQ

While creating and maintaining ideas is optional, as you can always create proposals and/or projects directly in Sensei IQ, we recommend using Portfolio IQ to create ideas to record all potential solutions for a business challenge or simply as a list of potential new projects. Capturing and recording ideas supports a strong organizational memory and ensures that good ideas are not forgotten.

There are two (2) core actions required for creating and maintaining ideas. Both are optional and can be completed as defined by organizational policies.

1. Creating and maintaining ideas
2. Managing the idea process flow

Creating and maintaining Ideas

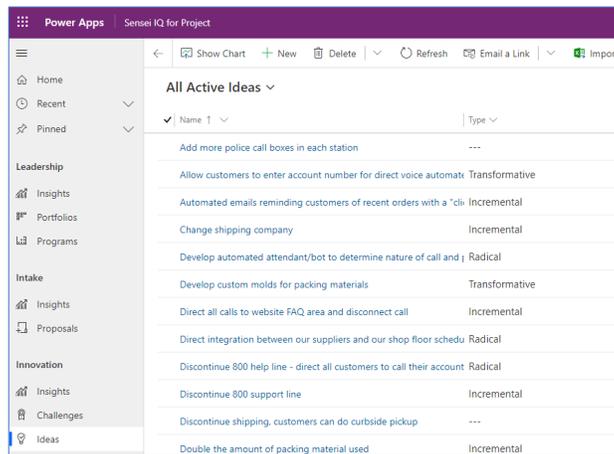
 **Portfolio/Program Manager**



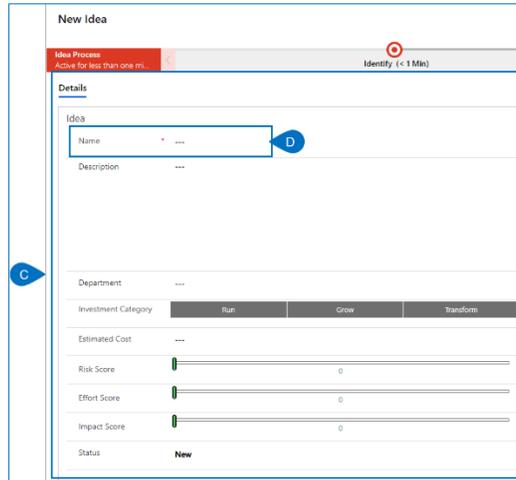
Portfolio IQ – Ideas

1. DEFINE THE NEW IDEA

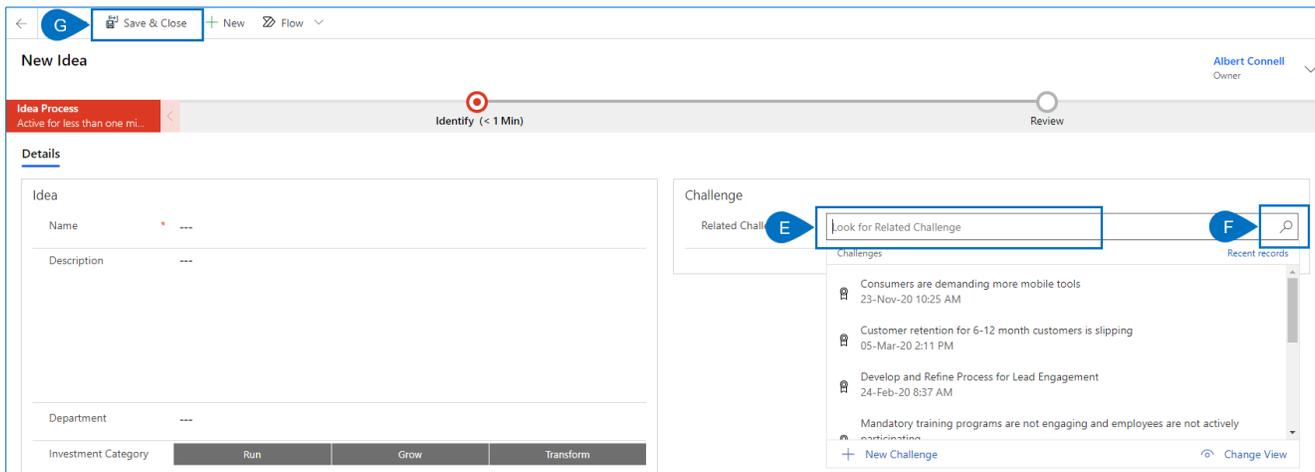
- a. Ensure you are in **Portfolio IQ**, and click **Ideas** in the **Innovations** section.
- b. Click **+ New** from the command bar.



- c. Complete the **Idea pane** with as much information as you have now.
- d. The Idea **Name field is mandatory**.



- e. If appropriate, mouse over **the Related Challenge** field to associate the Idea with a Business Challenge.
- f. **Search for and select** the appropriate Business Challenge.
- g. Click **Save & Close**.



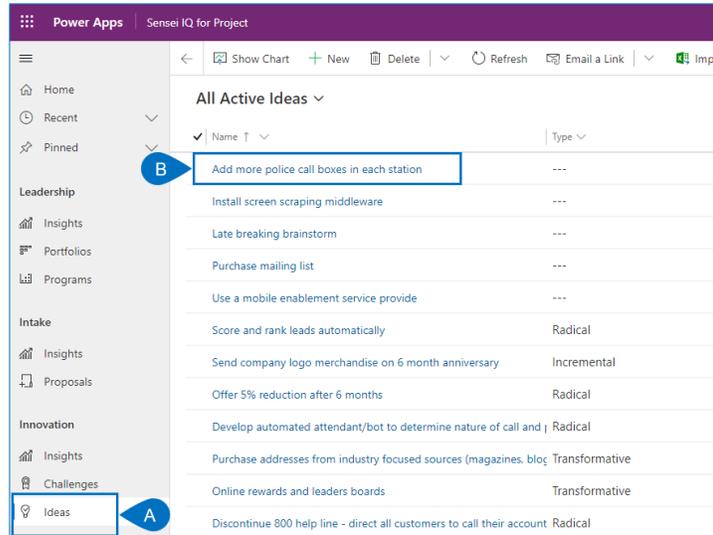
Managing the Idea process flow

 Portfolio/Program Manager

 Portfolio IQ - Idea – Process Flow

1. ADVANCE THE IDEA TO THE NEXT STAGE

- a. Ensure you are in **Portfolio IQ**, and click **Ideas** in the **Innovations** section.
- b. Select the appropriate **Idea** to be updated.



- c. Click the **current stage**.
- d. Update the **Stage** dropdown pane.
- e. Click the **Next Stage/Finished** button.
- f. Click **Save & Close**.

