Overview

This Job Aid defines the steps to follow for creating and managing proposals in Sensei IQ.

While creating and managing proposals is optional, as you can always create projects directly in Project IQ, we recommend using Portfolio IQ to create and ultimately approve proposals as it helps ensure that organizational resources are focused on the proposals/projects that deliver the most value to the organization.

There are two (2) core actions required for creating and managing proposals, and both are mandatory.

1. Creating and maintaining proposals
2. Managing the proposal approval process
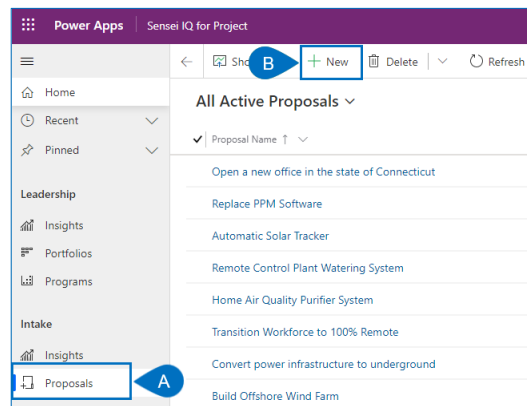
Creating and maintaining proposals

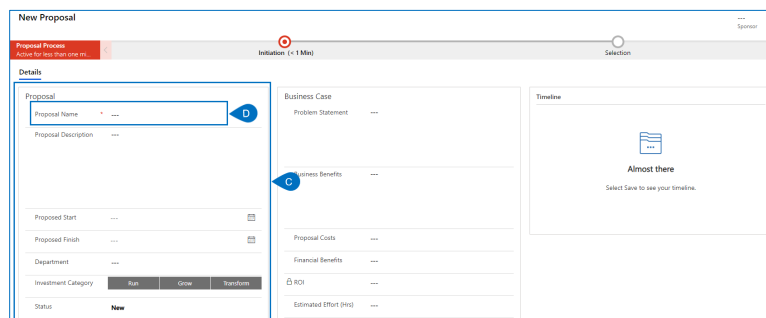👤 **Portfolio/Program Manager**   🔧 **Portfolio IQ – New Proposal**

1. DEFINE THE NEW PROPOSAL

a. Ensure you are in **Portfolio IQ,** and click **Proposals** in the **Intake** section.

b. Click **+ New** from the command bar.

c. Complete the **Proposal pane** with as much information as you have now.

d. The **Proposal Name** field is mandatory.

e. Similarly, complete the **Busines Case pane** with the information currently available.

f. **Click Save** to create the Proposal and activate the **Timeline pane**.

g. **Click + in the Timeline sub-ribbon** and then select Note to add a note.
h. Give the note a **Title and descriptive text** to describe the additional proposal content.
i. Click the **paper clip** to attach a file to the proposal.

2. UPDATE AN EXISTING PROPOSAL

a. Select **Proposals** from the **Site Map** to display the list of Active proposals.
b. **Adjust the view** as needed to ensure the proposal you are looking for is displayed.
c. **Select the proposal** to be updated.
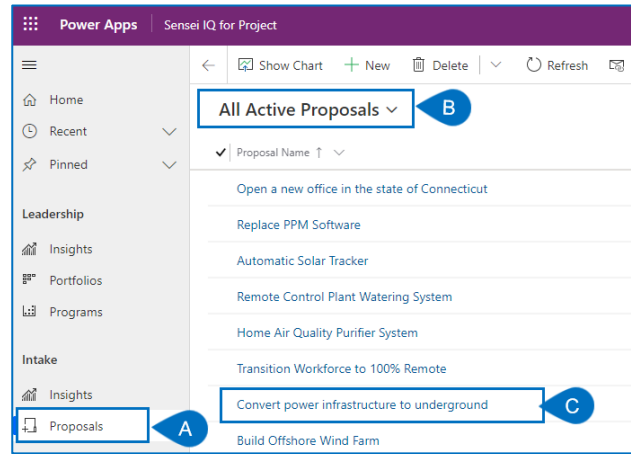
d. **Update any field** on the proposal.
e. **Click + in the Timeline** sub-ribbon, then select Note to add a note.
f. Click **Save and Close** when done.
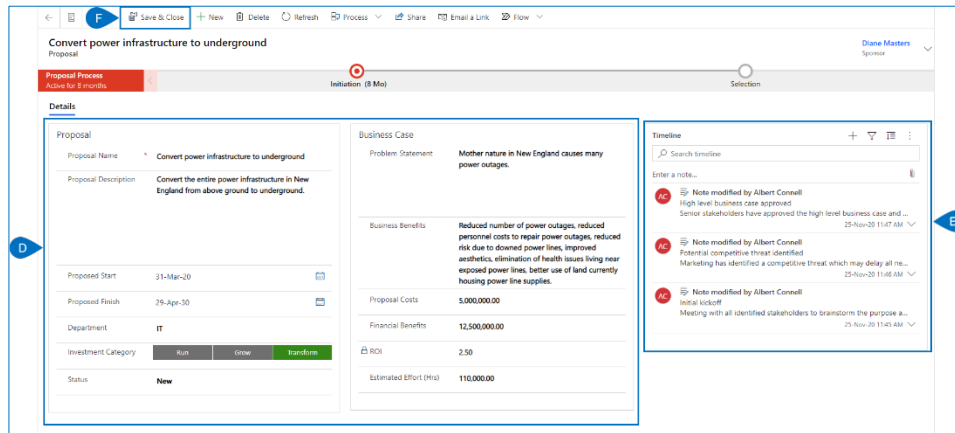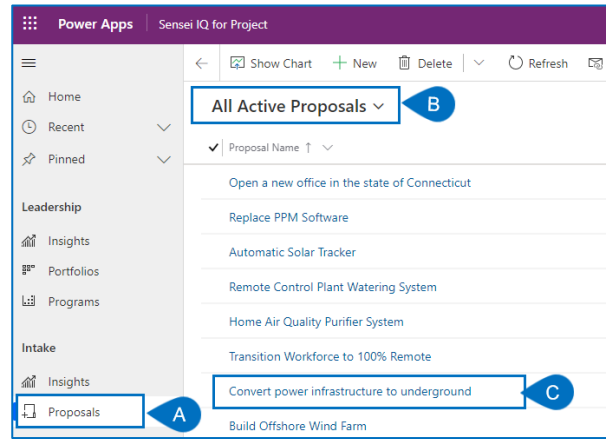

Managing the proposal approval process

👤 **Portfolio/Program Manager**   🔧 **Portfolio IQ - Current Proposal – Process Flow**

1. ADVANCE THE PROPOSAL TO THE NEXT STAGE

a. Select **Proposals** from the **Site Map** to display the list of Active proposals.
b. **Adjust the view** as needed to ensure the proposal you are looking for is displayed.
c. **Select the proposal** to be updated.

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