## Overview

This Job Aid defines the steps to follow for creating and maintaining business challenges in the platform.

While creating and maintaining business challenges is optional, as you can always create proposals and/or projects directly in the platform, we recommend using Portfolios to create Business Challenges as they are the initial entry point into the project intake funnel, and they help define the scope and help validate that the resultant project results resolve the original business challenge.

There are three (3) core actions required for creating and maintaining business challenges. All are optional and can be completed as defined by organisational policies.

1. Creating and maintaining business challenges
2. Associating ideas with challenges
3. Managing the challenge process flow
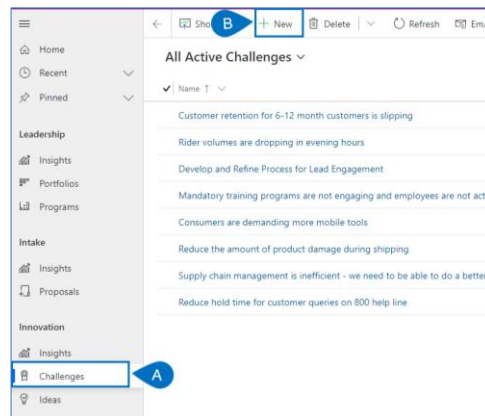
# Creating and maintaining Business Challenges

👤 Portfolio/Program Manager          🔧 Portfolios – Challenges
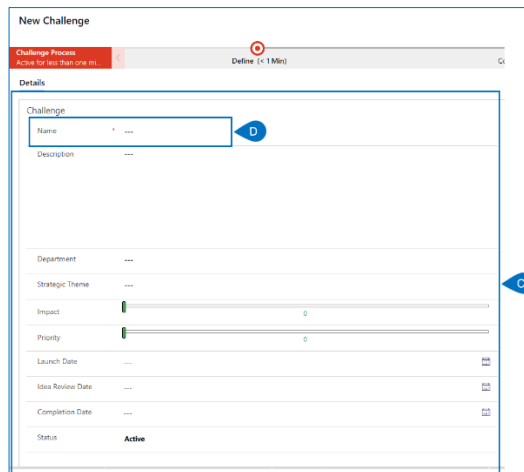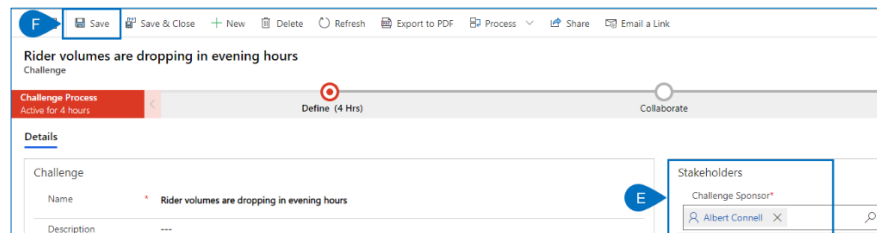
## 1. DEFINE THE NEW BUSINESS CHALLENGE

a. Ensure you are in **Portfolios** and click **Challenges** in the **Innovations** section.
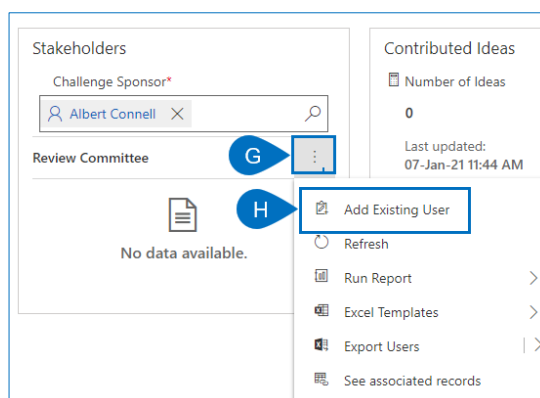b. Click **+ New** from the command bar.



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

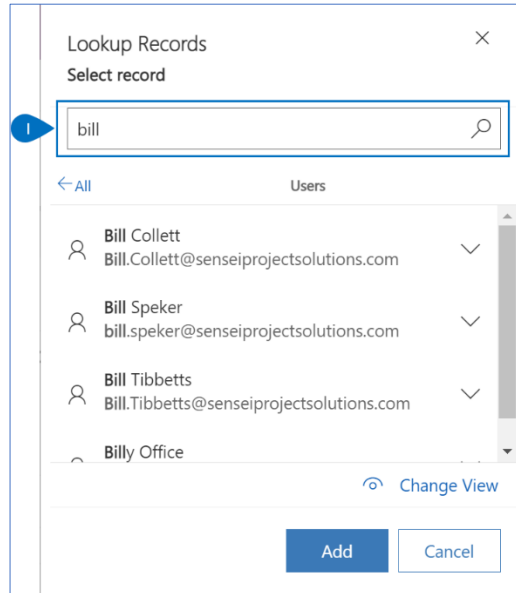e. Identify the **Challenge sponsor** in the Stakeholders pane.
f. Click **Save**.



g. Click on the **ellipsis** below the Stakeholder header.
h. Select **Add Existing User.**

i.  Search for and add the **challenge review committee members**.



j.  Click **Add** and then **Save and Close**.
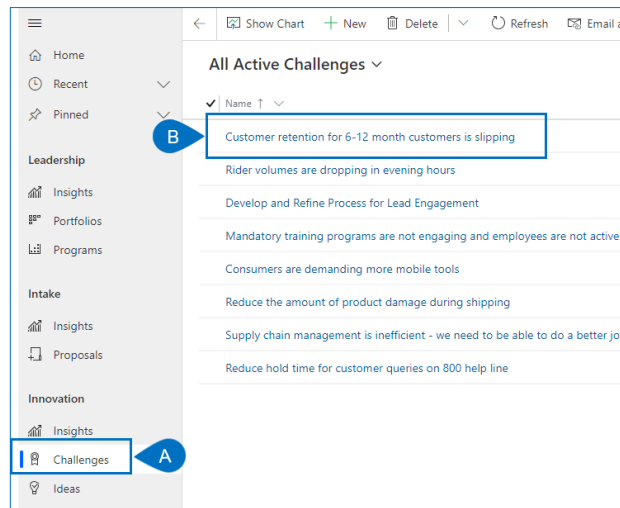
## Associating Ideas with Challenges

Portfolio/Program Manager                    Portfolios - Challenges
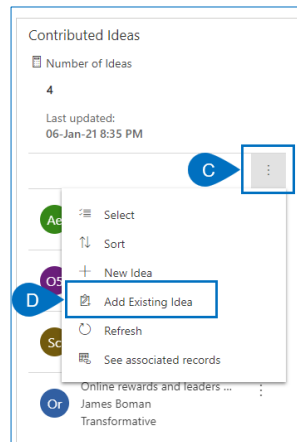
1.  ASSOCIATE IDEAS WITH CHALLANGES
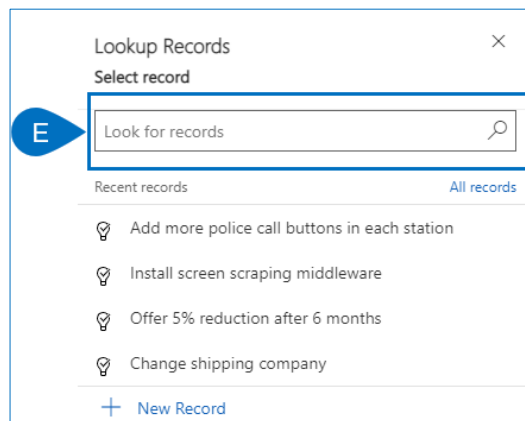
a.  Ensure you are in **Portfolios** and click **Challenges** in the **Innovations** section.
b.  Select the appropriate **Business Challenge** to be updated.

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c. Click the **ellipsis** under the **Contributed Ideas** pane header.
d. Select **Add Existing Idea.**



e. Search for and **add the appropriate Ideas**.

a. Click **Add** and then **Save and Close**.

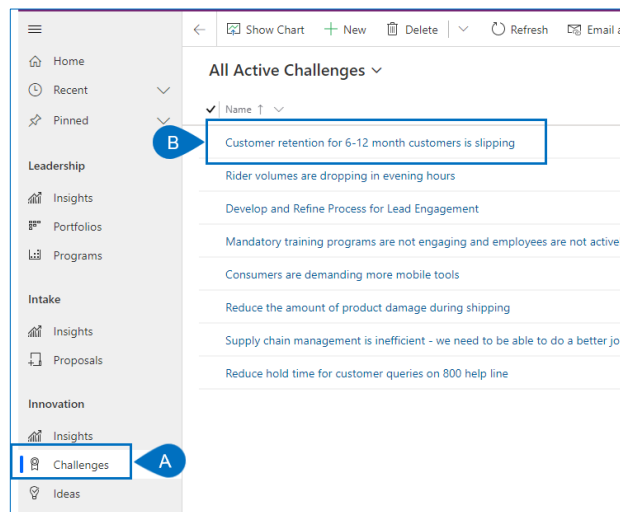## Managing the Challenge process flow

Portfolio/Program Manager

Portfolios -Challenge – Process Flow

### 1. ADVANCE THE BUSINESS CHALLENGE TO THE NEXT STAGE

a. Ensure you are in **Portfolios** and click **Challenges** in the **Innovations** section.
b. Select the appropriate **Business Challenge** 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**.