

Overview

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

While creating and maintaining ideas is optional, as you can always create proposals and/or projects directly in the platform, we recommend using Portfolios 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 organisational 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 organisational policies.

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

Creating and maintaining Ideas



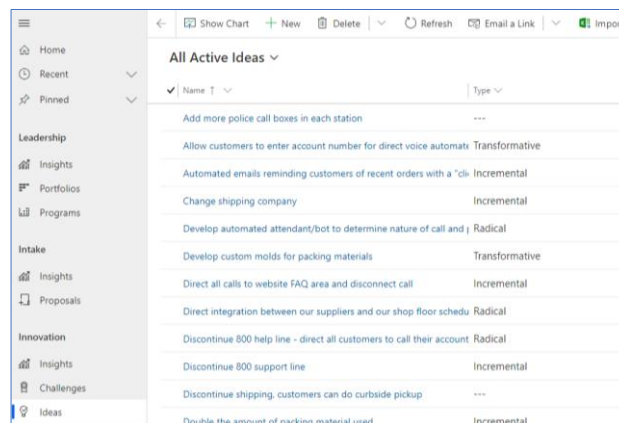
Portfolio/Program Manager



Portfolios – Ideas

1. DEFINE THE NEW IDEA

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



All Active Ideas	
Name	Type
Add more police call boxes in each station	---
Allow customers to enter account number for direct voice automate	Transformative
Automated emails reminding customers of recent orders with a "dis	Incremental
Change shipping company	Incremental
Develop automated attendant/bot to determine nature of call and y	Radical
Develop custom molds for packing materials	Transformative
Direct all calls to website FAQ area and disconnect call	Incremental
Direct integration between our suppliers and our shop floor schedu	Radical
Discontinue 800 help line - direct all customers to call their account	Radical
Discontinue 800 support line	Incremental
Discontinue shipping, customers can do curbside pickup	---
Double the amount of packing material used	Incremental

- 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



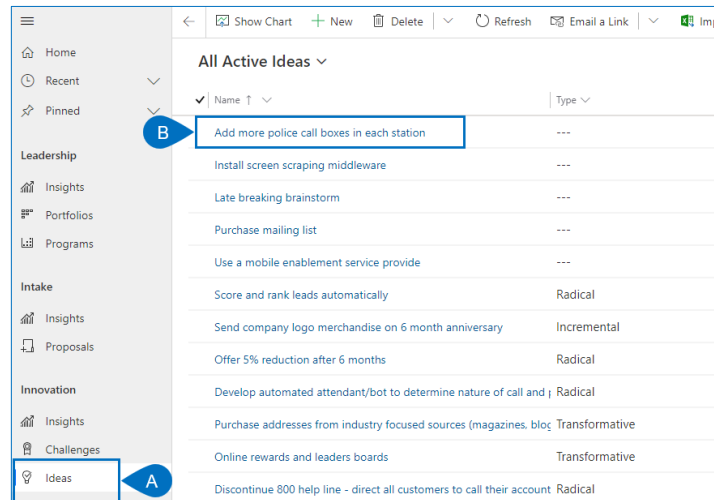
Portfolio/Program Manager



Portfolios- Idea – Process Flow

1. ADVANCE THE IDEA TO THE NEXT STAGE

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



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

