Overview

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

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

There are three (3) core actions required for creating and managing proposals. Though defining resource requirements for proposals is optional, we do recommend doing so to ensure the organisation understands the level of effort that will be required to deliver the project if it is approved. The other two actions are mandatory.

1. Creating and maintaining proposals
2. Defining proposal resource requirements
3. Managing the proposal approval process
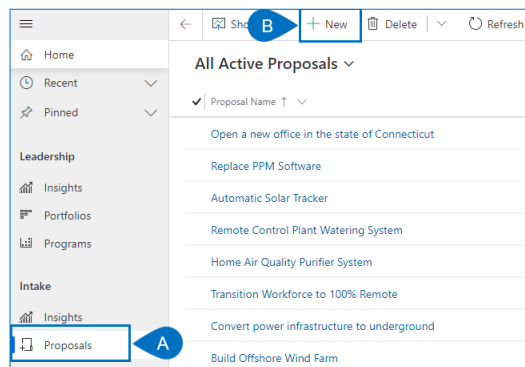
Creating and maintaining proposals

👤 Portfolio/Program Manager   🔧 Portfolios – New Proposal
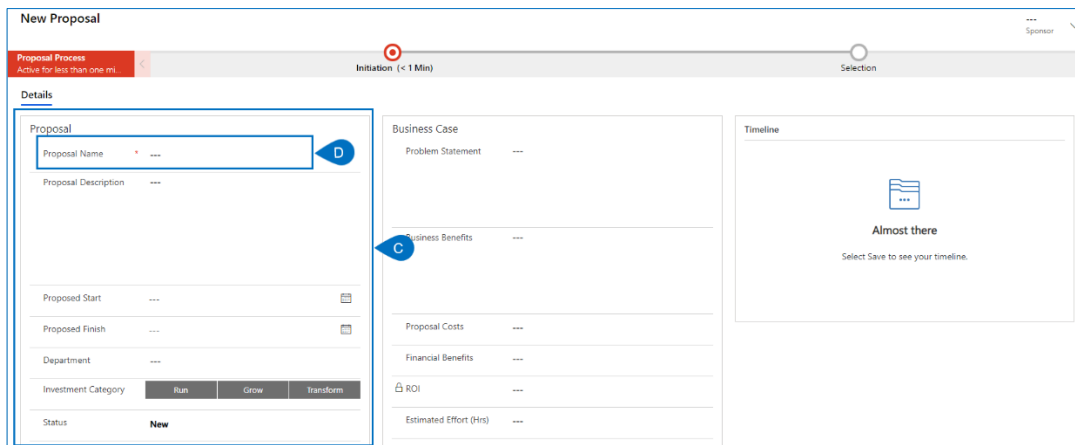
1. DEFINE THE NEW PROPOSAL

a. Ensure you are in **Portfolios** 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.
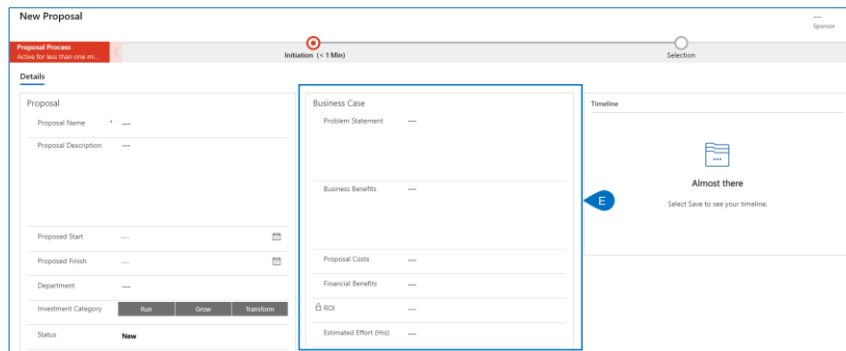
e. Similarly, complete the **Business Case pane** with the information currently available.
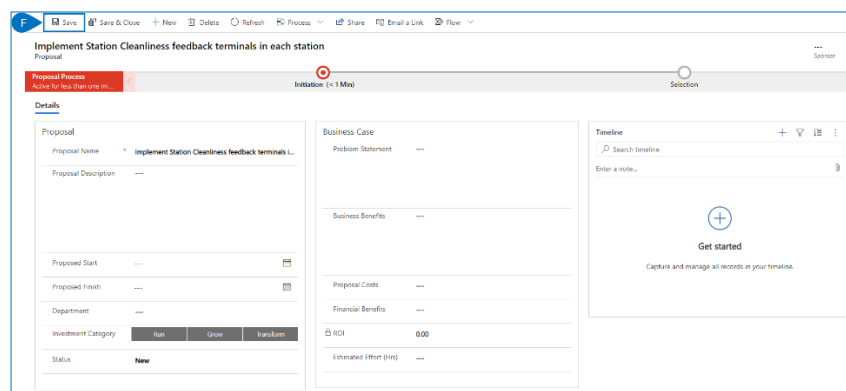
f. Click **Save** to create the Proposal and activate the **Timeline pane**.
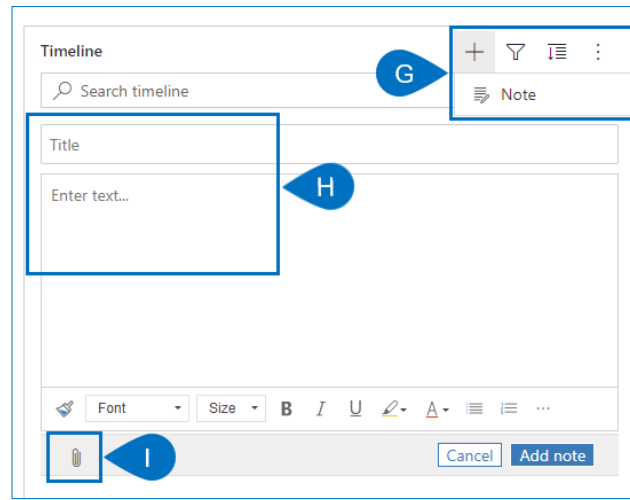
g. **Click + in the Timeline sub-ribbon** and then select **Note** to add a note.
h. Give the note a **Title and descriptive text** to describe the additional proposal content.
i. Click the **paper clip** to attach a file to the proposal.

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.
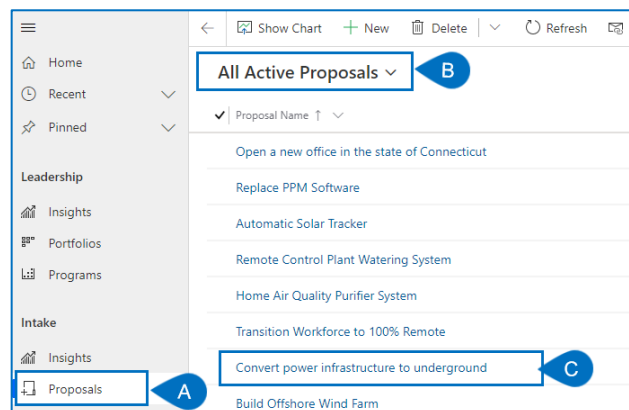c. **Select the proposal** to be updated.

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.

Defining proposal resource requirements

👤 Portfolio/Program Manager   🔧 Portfolios - Current Proposal – Resource Plan

1. **CREATE GENERIC RESOURCE REQUESTS**

a. Open the **Resource Plan** tab.

b. Search for and select the **Generic resources** with the skills that will be **required on the project** if the **proposal is approved.**

|

c. **On a time-period basis,** define the **number of hours** each generic resource will be required **to complete the project.** If **multiple resources** are required, ensure the number of hours **reflect the total effort to be completed.**

Details	Resource Plan	Override Sell Rates

| Requests by Primary Role	Visible Period Total ←	September 2022		October 2022		November 2022		December 2022	
	P	P	A	P	A	P	A	P	A
Totals	8,150.0	525.0	0.0	525.0	0.0	875.0	0.0	875.0	0.0
⌃ Marketing	600.0	75.0	0.0	75.0	0.0	75.0	0.0	75.0	0.0
Generic	600.	75		75		75		75	

d. Click **Save** from the at the bottom of the form when you are done.

Managing the proposal approval process

👤 Portfolio/Program Manager   🔧 Portfolios - 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.
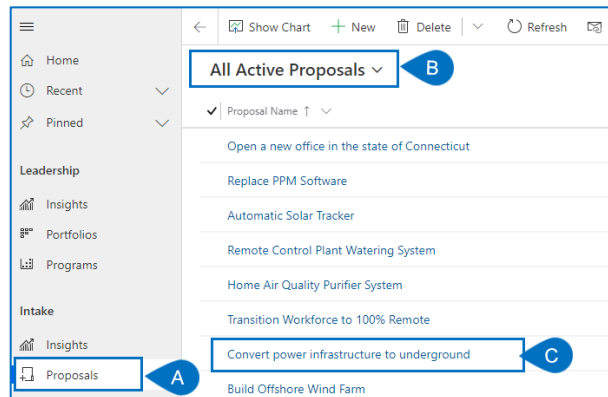
d. Click the **current stage.**
e. **Update the Stage** dropdown pane.
f. Click the **Next Stage/Finished button.**
g. Click **Save & Close.**