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 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 organization understands the level of effort that will be required to deliver the project if it is approved. The other two actions are mandatory.

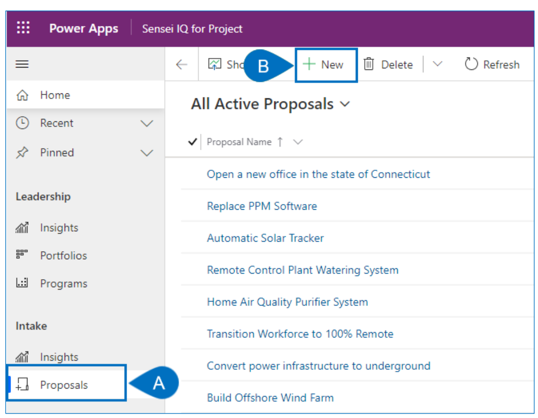
1. Creating and maintaining proposals
2. Defining proposal resource requirements
3. Managing the proposal approval process

Creating and maintaining proposals

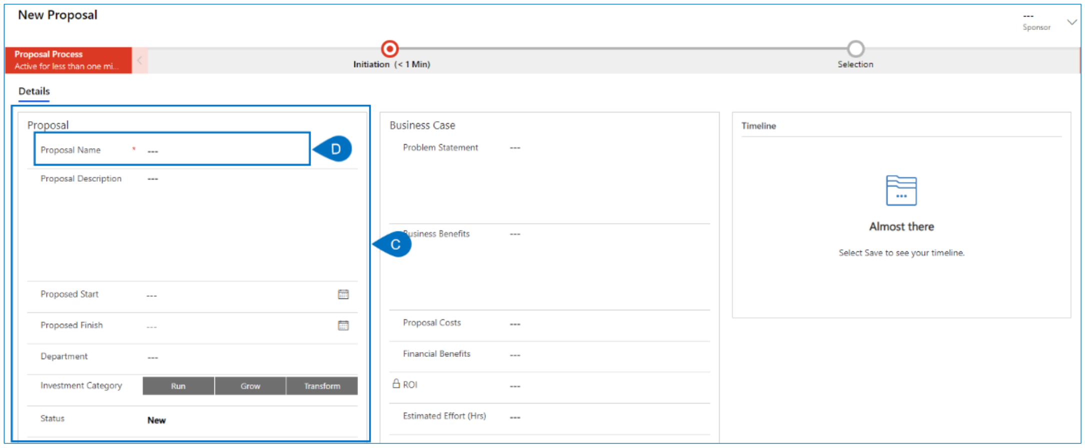
Portfolio/Program Manager **Portfolio – New Proposal**

1. DEFINE THE NEW PROPOSAL

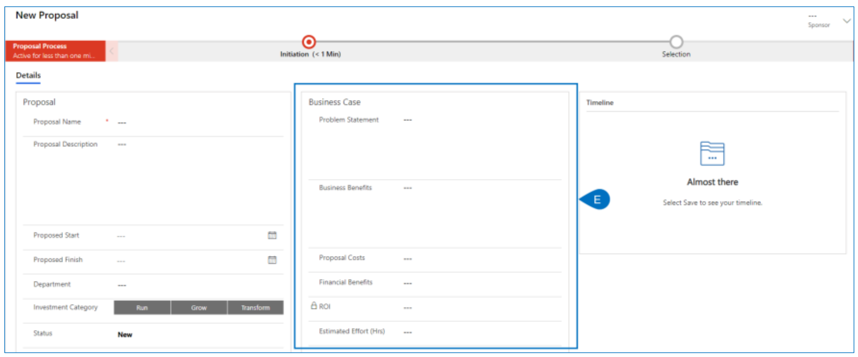
a. Ensure you are in **Portfolios,** and click **Proposals** in the **Intake** section.
b. Click **+ New** from the command bar.



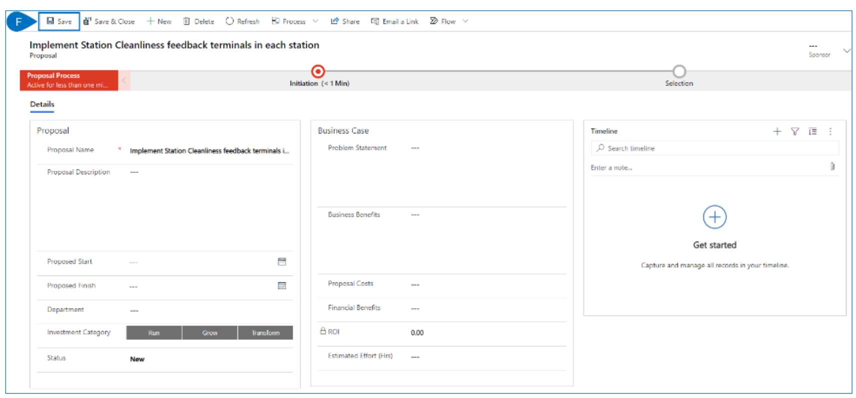
c. Complete the **Proposal pane** with as much information as you have now.
d. The **Proposal Name** field is mandatory.



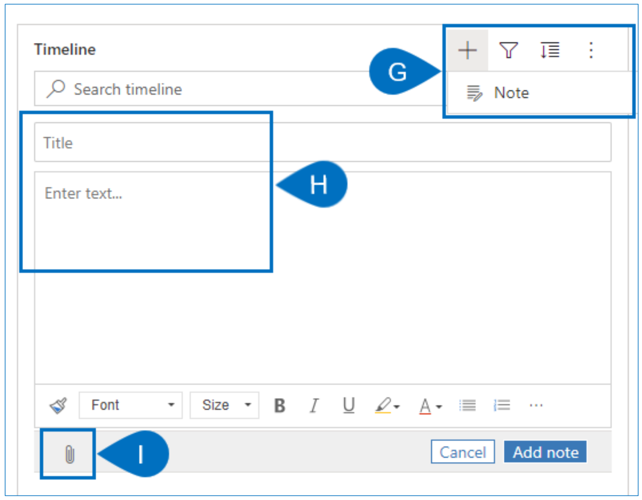
e. Similarly, complete the **Business Case pane** with the information currently available.



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

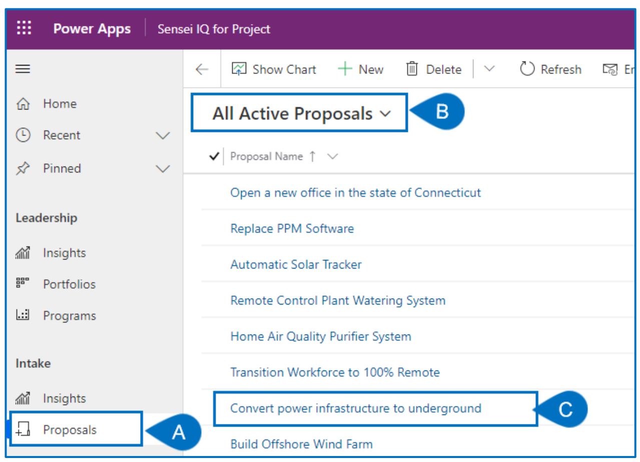


g. **Click + in the Timeline sub-ribbon** and then select **Note** to add a note.
h. Give the note a **Title and descriptive text** to describe the additional proposal content.
i. Click the **paper clip** to attach a file to the proposal.

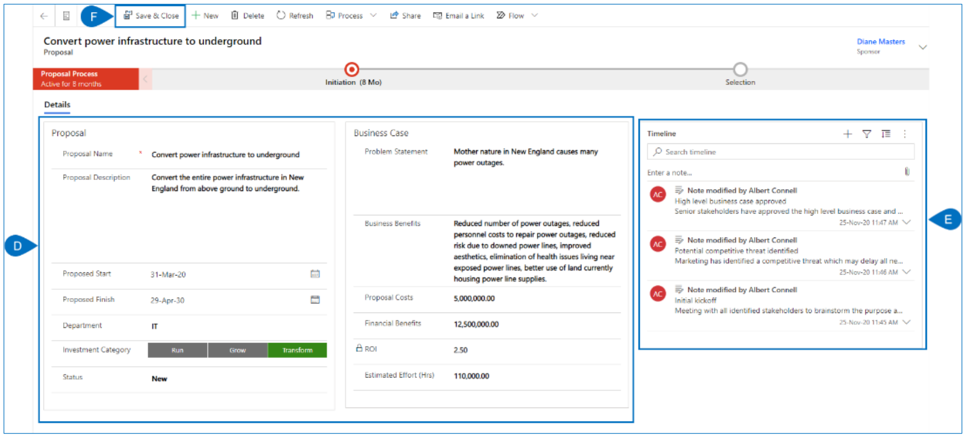


2. UPDATE AN EXISTING PROPOSAL

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.

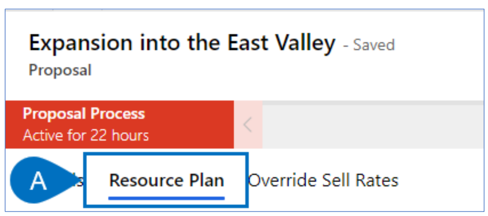


Defining proposal resource requirements

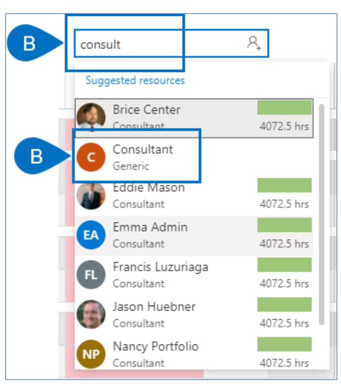
Portfolio/Program Manager **Portfolio - Current Proposal – Resource Plan**

1. CREATE GENERIC RESOURCE REQUESTS

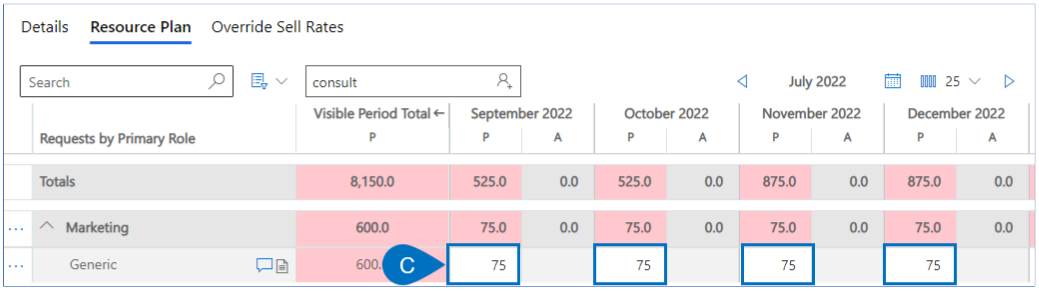
a. Open the **Resource Plan** tab.



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**.



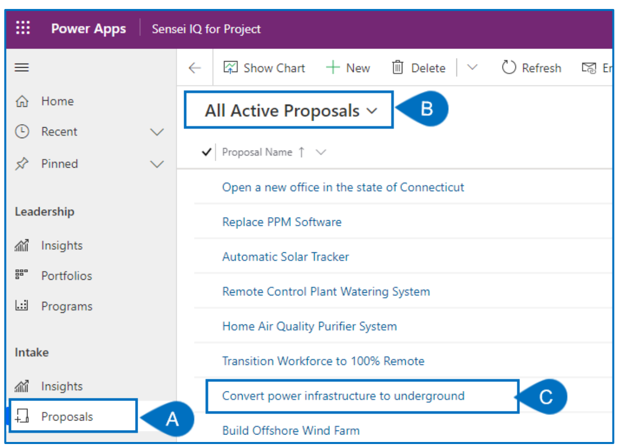
d. Click **Save** from the at the bottom of the form when you are done.

Managing the proposal approval process

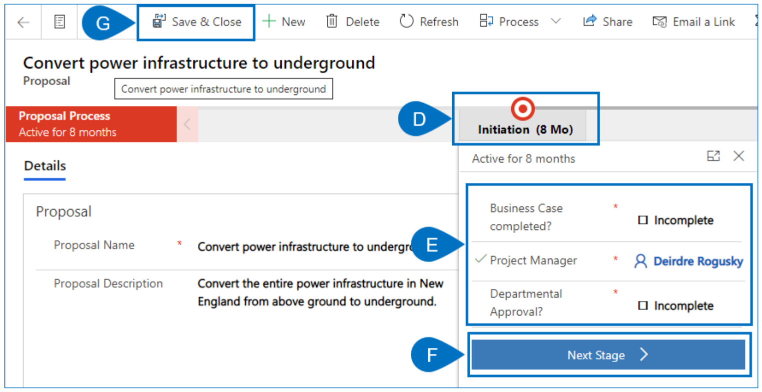
Portfolio/Program Manager — **Portfolio - Current Proposal – Process Flow**

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**.


G
Save & Close
New
Delete
Refresh
Process
Share
Email a Link
Convert power infrastructure to underground
Proposal
Convert power infrastructure to underground
Proposal Process
Active for 8 months
D
Initiation (8 Mo)
Details
Active for 8 months
Proposal
Proposal Name
Convert power infrastructure to undergr
E
Proposal Description
Convert the entire power infrastructure in New England from above ground to underground.
Business Case completed?
Incomplete
Project Manager
Deirdre Rogusky
Departmental Approval?
Incomplete
F
Next Stage

