Welcome to the Enterprise Decision Support Solution and the Decision Lens software. This quick start guide is intended to walk Agency Point of Contacts (POCs) through the process on how to add and update investments in Decision Lens.

Step 1: Access Decision Lens/Enterprise Planning Portfolio (EPP)
https://ohid.ohio.gov/

Step 2: Go to the Investments screen (Data Studio)
After login; select your Portfolio tile and then select the “All Investments” option. This will take you to the Data Studio which is a spreadsheet view of your portfolio.

For assistance with Decision Lens, please email DAS.State.ITPlanning.Manager@das.ohio.gov
Step 3: Adding/Updating Investment Data (Owner, Participant, Contributor Role)

Step 3a: Method 1 – Form View
While in the Data Studio, navigate to the desired investment, and click three ellipses (···) to the right of the title and select View Investment Details. The Investment’s form view will open with all available fields displayed. Edit desired fields. When data updates are complete, click Close to return to the Data Studio.

NOTE: Using the Form View to make edits allows you to view the field descriptions.

Step 3b: Method 2 – Directly in Data Studio
To edit data fields for portfolio investments, scroll left or right to the desired cells. Make edits directly in the fields. There are various types of fields: text, numeric, drop-downs, and 1–5-star ratings. All edits are in real time and changes are made automatically.

Data Collection Through Standardized Intake Forms (Idea Engine)
Portfolio owners can automate and streamline their requirements/project data collection by utilizing the Intake Form and distributing to stakeholders to obtain Ideas.

Step 1: Setup the Intake Form (Owner)
Prior to Stakeholders submitting new Investments, an Owner may use the Idea Engine to create a link that is used by stakeholders within the organization.

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**Quick Start Guide**

**Adding and Updating Investment Data**

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**Step 1a: Create a Form Link**

From within the Data Studio, use the main drop-down (···) and select “Request Ideas”. This will open the Request Ideas setup screen. Drag the desired fields from the left section into the “Included” section that are to be completed by the submitter and designate fields as required or not required.

**Step 1b: Share a Form Link**

Click the “Share” link to open the Invite Contributors screen. Click “Copy Link” to copy a link to your clipboard and distribute this link to the submitter(s). The gear box will generate a new link, thus rendering the previous link no longer usable.

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**Step 2: Adding new Investments via a Form Link (Submitter)**

Adding a new Investment to a portfolio can be performed via the Idea Form using a link created by the portfolio owner. Obtain the form link from the Agency POC. Paste the Idea Form link in your browser (using Chrome, Firefox, or Edge).

**Step 2a: Enter Investment Title**

Enter a title for the new Investment. Click Create Draft. The Investment is now added to the portfolio with “DRAFT” status.
Step 2b: Populate Fields
Populate the remaining fields using the field descriptions to guide you. Fields are required or optional. When finished, click Submit as Proposed. The Investment will be added to the portfolio with “PROPOSED” status and be available in the workflow. To add another new Investment, paste the Idea Form link into the browser again and repeat the steps above.

Complete the Form