

Quick Start Guide

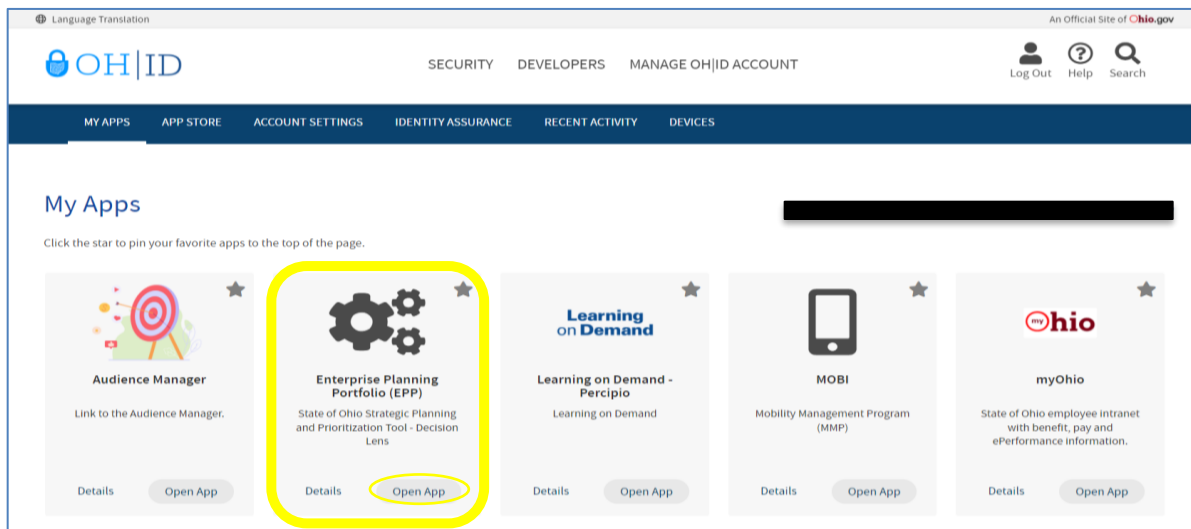
Adding and Updating Investment Data

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)

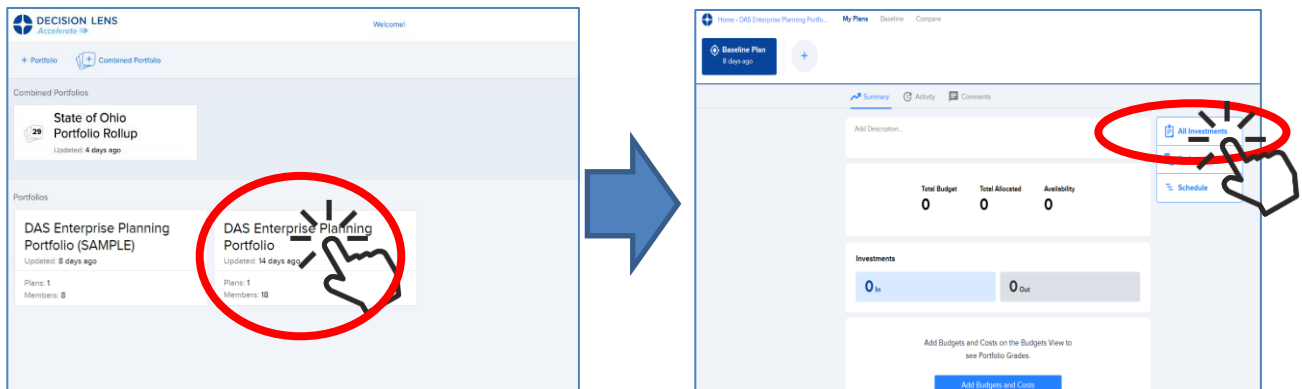
<https://ohid.ohio.gov>

Access your State of Ohio Applications via OHID.ohio.gov. On the My Apps page, choose the Enterprise Planning Portfolio (EPP) tile and click Open App.



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.



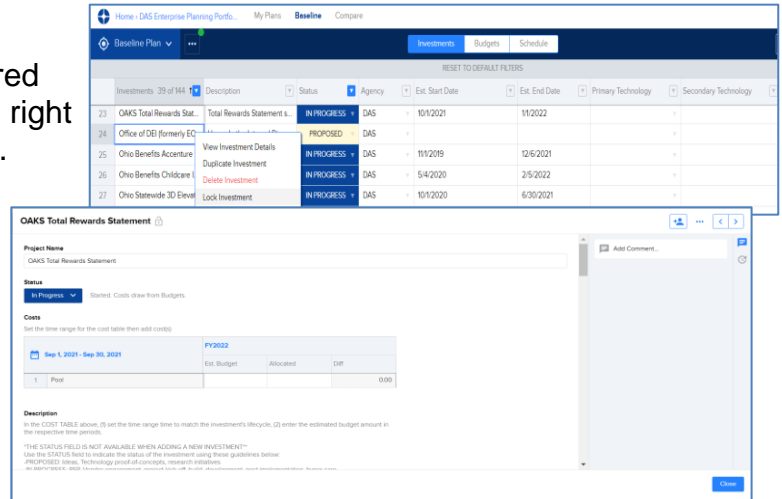
Step 3: Adding/Updating Investment Data (Owner, Participant, Contributor Role)

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.

Investme...	Project Sponsor	OU1	OU2	Shared Services/Agency	Major Project
33 OAKS Total Rewards ...	Maggie Toal	SHRD	OTM	Shared Services	Yes
34 Office of DEI (formerl...	Jennifer Adair	ASD	DEI		
35 Ohio Benefits Accen...	Kris Hagberg	DIR		Shared Services	Yes
36 Ohio Benefits Childc...	Kris Hagberg	EOD	ESS	Shared Services	Yes
37 Ohio Statewide 3D E...	David Blackstone	GSD	ESS	Shared Services	Yes
38 Oracle Exadata Hard...	Steve Williams	HRD	ESS	Shared Services	Yes
		OCB	ISS	Shared Services	Yes
		OIT	ISD	Shared Services	No
		SHRD			

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)

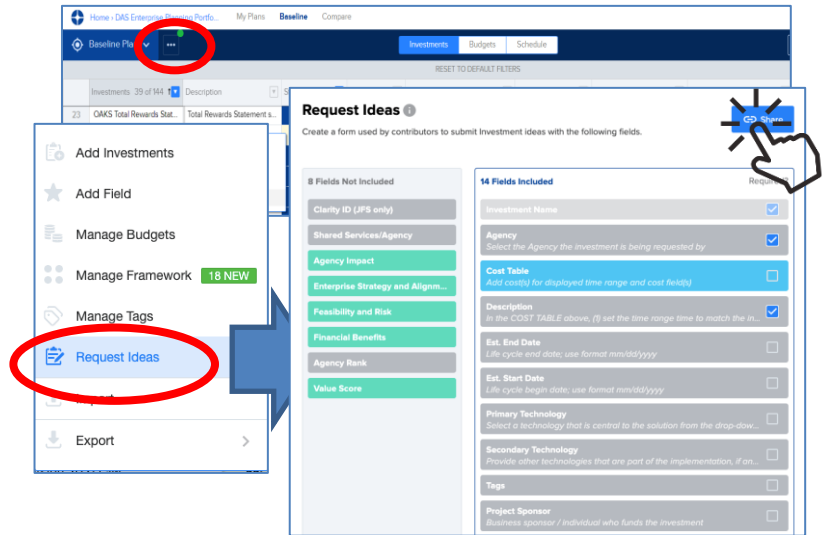
Prior to Stakeholders submitting new Investments, an Owner may use the Idea Engine to create a link that is used by stakeholders within the organization.

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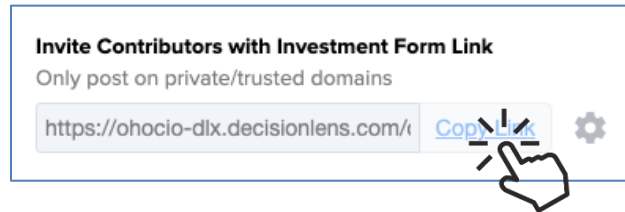
Step 1a: Create a Form Link

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.



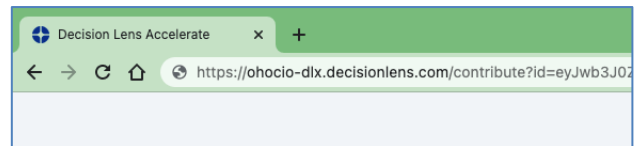
Step 1b: Share a Form Link

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.



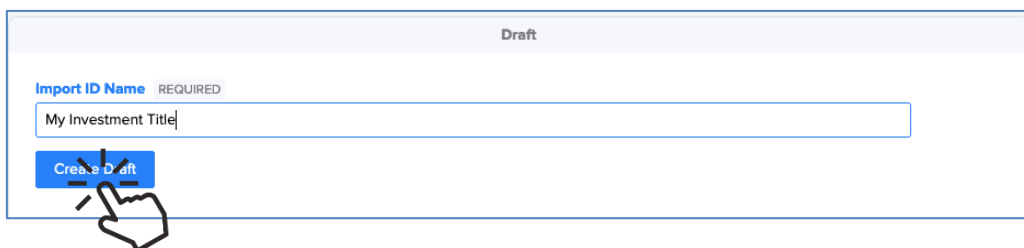
Step 2: Adding new Investments via a Form Link (Submitter)

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

The screenshot shows a web form titled 'Import IDs' with a breadcrumb 'My Investment Title'. The form is in 'Draft' status. A red box highlights the 'Submit as Proposed' button in the top right corner, with a hand cursor pointing to it. A large red oval highlights the main form fields. The fields include:

- Import ID Name** (REQUIRED): A text input field containing 'My Investment Title'.
- Agency** (REQUIRED): A dropdown menu with 'DAS' selected.
- Costs**: A table with columns for time range and cost field(s).

Jul 1, 2022 - Jun 30, 2023		FY2023
1	Pool	50,000.00

- Description** (REQUIRED): A text area with instructions on how to use the COST TABLE and STATUS field.
- Est. Start Date**: A text input field for the life cycle begin date.
- Est. End Date**: A text input field for the life cycle end date.
- Primary Technology**: A dropdown menu for selecting a technology.