



IDEATION FOR PROJECT FOR THE WEB DOCUMENTATION AND SETUP INSTRUCTIONS

IDEATION FOR PROJECT FOR THE WEB SOLUTION OVERVIEW

Ideation for Project for the Web solution was designed for creating and managing business challenges within the organization; this solution allows team members to submit their ideas, requests, or suggestions for improvements within business challenges, and enables managers to create projects in Project for the Web from ideas selected for implementation.

PREREQUISITES

The following prerequisites are required for *deploying Ideation for Project for the Web* solution.

1. **Dataverse** environment – **Default** environment or a **non-Default Sandbox** or **Production** Dataverse environment.
2. **System Administrator** security role for this environment.
3. **Power Apps** license for the user who is deploying Ideation for Project for the Web solution.

The following prerequisites are required for *using Ideation for Project for the Web* solution.

1. **Power Apps** license.
2. **Project Plan 1** license (or higher) – only for those users who will be creating projects in MS Project for the Web.

SECURITY

Ideation for Project for the Web solution comes with two **custom security roles**.

Before a user can start working with Ideation for Project for the Web, they must be assigned one of the security roles:

- **BCI Manager** – users with this role can create and manage business challenges, create, and manage ideas and create projects from Selected ideas.
- **BCI Member** – users with this role can create ideas for Active business challenges.

NOTE: In addition to the custom security role, make sure that all users who work with the app have the standard **Basic User** security role assigned.

SETUP INSTRUCTIONS

Ideation for Project for the Web solution includes several components, follow the steps below to configure each of the components.

STEP 1: IMPORT SOLUTION

1. Open **Ideation for Project for the Web** solution page in AppSource and click **GET IT NOW**.
2. Provide contact information required by Microsoft and click **Continue**.
3. In Power Platform Admin Center in Install Ideation for Project for the Web solution **select the environment** into which Ideation for Project for the Web installation will be performed:
 - Default environment
 - Or a non-Default Production/Sandbox Dataverse environment

NOTE: Microsoft Project solution must be already deployed in the environment where Ideation for Project for the Web is being installed.

4. Check **I agree** checkboxes and click **Install**.
Wait for the installation process to complete.

STEP 2: ENSURE CLOUD FLOWS ARE TURNED ON

Perform the steps to update the flows **only** for the flows that have **OFF** status, if all flows are **ON**, steps to update the flows can be skipped.

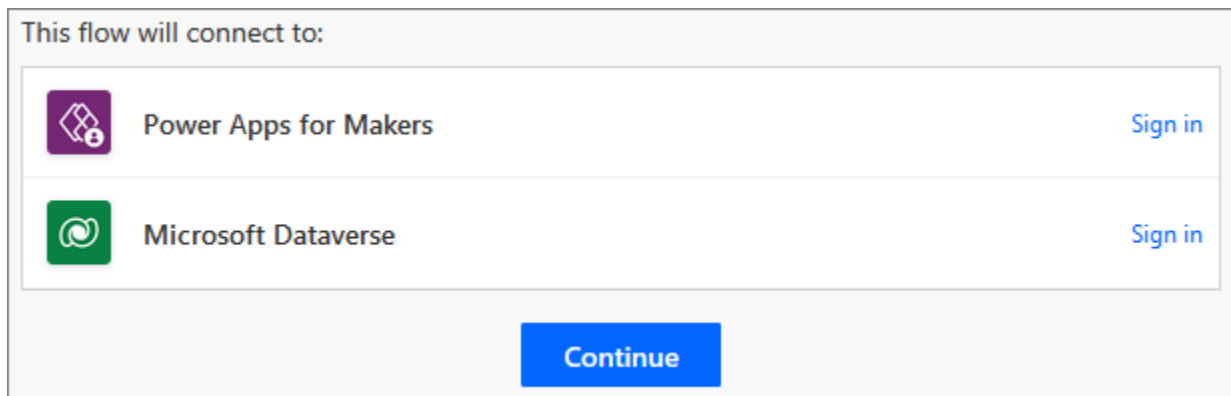
1. Sign into <https://make.powerapps.com>.

2. In the top header, open the **Environments** menu and select the environment into which Ideation for Project for the Web was installed.
3. On the left navigation, click the **Solutions** menu item.
4. Click **Ideation for Project for the Web** solution to open it, select **Cloud Flows** from the sub-menu and make sure all the flows have **ON** status.

If all the flows have **ON** status, proceed to the next section – **Step 3: Share Canvas Apps**.

If any of the flows have **OFF** status, proceed with the steps below for each of the flows with OFF status:

5. Click on the flow with OFF status and open it.
6. Click **Edit** on the toolbar.
7. Click **Continue** on the step **This flow will connect to:**



8. Click **Save**, wait for the save process to complete and close the tab with the flow.
9. For the flow that has **OFF** status, click 3 dots then **Turn On**, wait for the flow to get turned on.

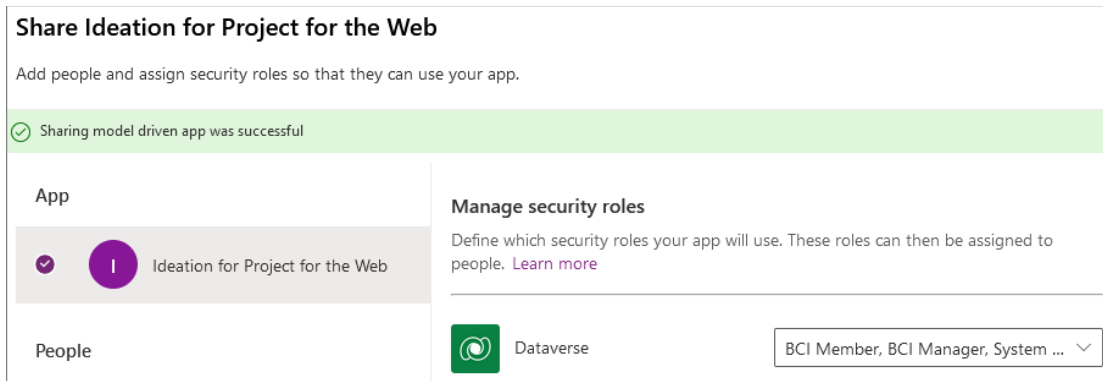
STEP 3: SHARE CANVAS APPS

1. Go back to the **Solutions** list.
2. Open **Ideation for Project for the Web** solution from the list and select **Apps** from the sub-menu.
3. Share each of the **Canvas** apps present in Ideation for Project for the Web solution with all users who should have access to Ideation for Project for the Web.

NOTE: A good practice would be to use a **Security Group** for sharing Canvas apps. Using a Security Group, instead of adding each user individually will help to reduce manual work.

STEP 4: DEFINE SECURITY ROLES FOR IDEATION FOR PROJECT FOR THE WEB MODEL-DRIVEN APP

1. Click 3 dots next to the **Ideation for Project for the Web** model-driven app to open the context menu and select **Share** from this menu.
2. In the **Share Ideation for Project for the Web** select **Ideation for Project for the Web** app and in the **Manage security roles** section select **BCI Manager** and **BCI Member** custom security roles and click **Share**:



STEP 5: ASSIGN SECURITY ROLES

1. Go back to the environment in <https://make.powerapps.com>.
2. Press **Gear** button on the top right and select **Admin center** from the menu.
3. In the **Power Platform Admin center > Environments** click on the environment where Ideation for Project for the Web solution is installed.
4. In the **Access** section click See all for **Security roles**.
5. On the **Security roles** page click on the **BCI Manager** role, click **Add people** on the toolbar and add all users/teams who will need **Manager access** to Ideation for Project for the Web.
6. Click **Add** to apply the changes.
7. Then go back to the Security roles list, click on the **BCI Member** role, click **Add people** on the toolbar and add all users/teams who will need **Member access** to Ideation for Project for the Web.
8. Click **Add** to apply the changes.

NOTE: Make sure to assign **only one role** to each specific user, do not assign both roles to one user.

***NOTE:** It is also possible to assign a custom security role to a **Team** instead of an individual user. It would be a good practice to create teams for BCI Managers role and for BCI Members role, assign appropriate roles to these teams, and further add/remove users to the teams as necessary.*

Congrats! Ideation for Project for the Web app is ready for use now.

*Review the **User Guide** section to get information on how to create and manage business challenges, ideas and how to create projects in Project for the Web from the ideas.*

Ideation for Project for the Web solution was designed for creating and managing challenges within the organization, this solution allows team members to submit their ideas, project requests, change requests or suggestions for improvements within business challenges.

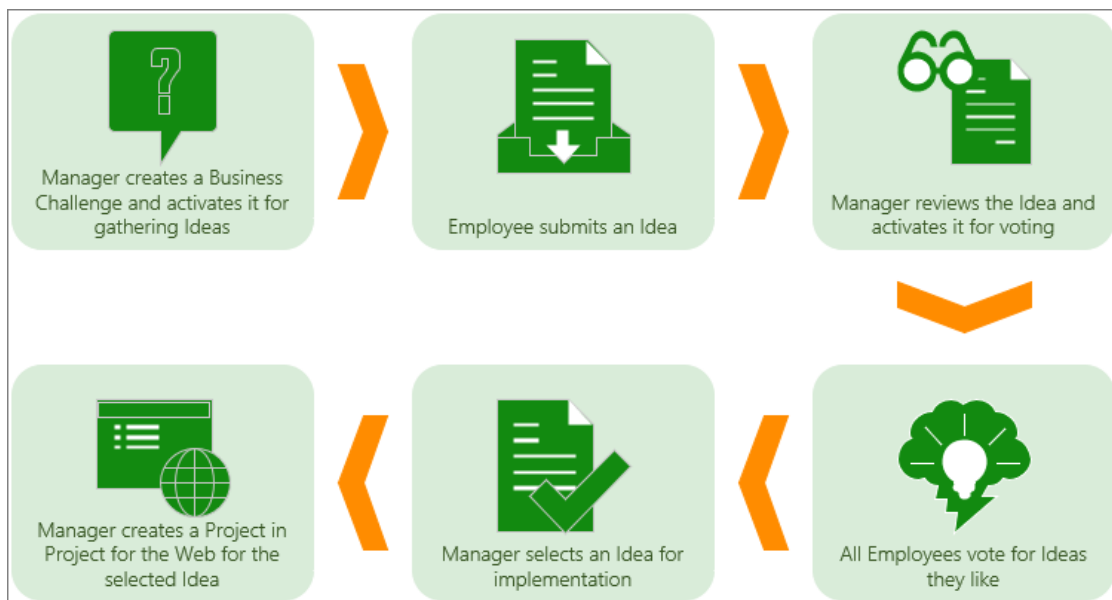
Ideation for Project for the Web solution is a platform that would let anyone in the organization submit new ideas, suggest improvements, request changes, or propose new projects and products.

We will review how to create a new business challenge, how to add ideas to it, manage these ideas and create projects out of the most reasonable ideas.

NOTE: Only users with **BCI Manager** role can create and manage business challenges, as well as change ideas statuses and create projects from ideas. Users with **BCI Member** role can submit ideas for business challenges with Active status. Projects that managers create out of the ideas, get created in Project for the Web, therefore, Project Plan 1 license (or higher) must be assigned to work with Project for the Web. Users who only submit ideas do not require Project Plan license assigned.

IDEATION FOR PROJECT FOR THE WEB - WORKFLOW

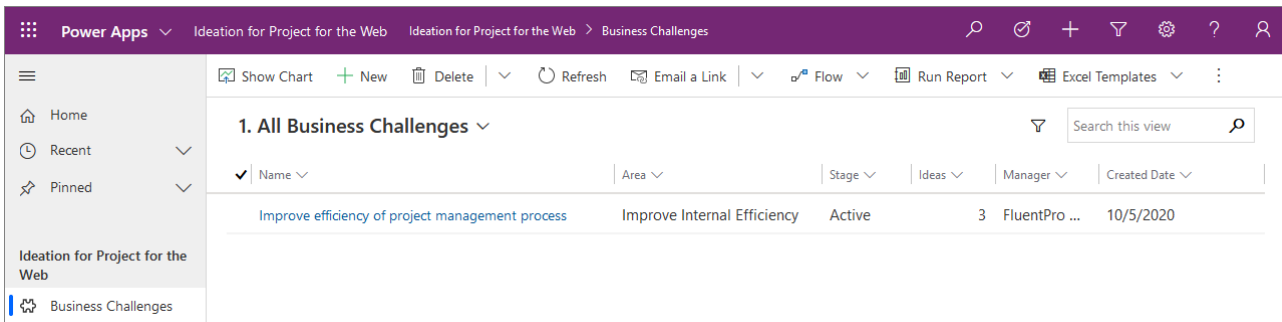
The following workflow represents the process of working with the **Ideation for Project for the Web** solution – from proposing a business challenge to capturing, liking, and selecting ideas and creating projects for implementation in Project for the Web from the most promising ideas.



BUSINESS CHALLENGES SECTION

Business challenges section displays the list of challenges based on the selected view:

- All Business Challenges – all challenges created in the app
- Active Business Challenges – challenges at the Active stage
- My Business Challenges – challenges where Manager is set to the current user
- Draft Business Challenges – challenges at the Draft stage
- Closed Business Challenges – challenges at the Closed stage



CREATING A NEW CHALLENGE

To **create a new business challenge**, perform the following:

1. In the **Business Challenges** section click **New** on the toolbar.
2. Provide Business Challenge name, select the Area to which this Business Challenge is related, enter a Description, and select the Stage – Draft, Active or Closed.
3. Click **Save** to complete the creation process.

NOTE: The challenges are created at the **Draft** stage by default. Users cannot submit ideas for the challenges that are at the Draft stage. As soon as the challenge stage is set to **Active**, users can review this challenge and post their ideas to it.

Manager field is auto set to the user account of the person who created the challenge. **Created Date** field is auto set to the date & time when the challenge was created.

Save Save & Close + New Deactivate Delete Refresh Assign Share Email a Link Flow

Improve efficiency of project management process

Business Challenge

General Related

Name	* Improve efficiency of project management process
Area	Improve Internal Efficiency
Description	Organization is looking how to improve efficiency of project management process.
Stage	Active
Manager	* FluentPro
Created Date	10/5/2020 3:20 PM

IDEAS SECTION

Ideas section displays the list of ideas based on the selected view:

- All Ideas – all ideas created in the app
- Active Ideas – ideas at the Active stage
- My Ideas – ideas where Submitter is set to the current user
- Selected Ideas – ideas at the Selected stage
- Not Selected Ideas – ideas at the Not Selected stage
- Decision Matrix – Idea Score and Impact, Risk, Cost, Revenue and Efforts values for each idea

Power Apps Ideation for Project for the Web Ideation for Project for the Web > Ideas

Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates

1. All Ideas Search this view

Name	Related Business Challenge	Stage	Votes	Submitter	Created Date
Training PMs	Improve efficiency of project management process	Draft	---	FluentPro ...	10/5/2020
Implement a better management tool	Improve efficiency of project management process	Active	1	FluentPro ...	10/5/2020
Implement a better change management protocol	Improve efficiency of project management process	Selected	1	FluentPro ...	10/5/2020

Name	Stage	Votes	Impact Status	Risk Status	Cost Status	Revenue St...	Efforts Status	Idea Score	Submitter	Created Date
Training PMS	Draft	---	N/A	N/A	N/A	N/A	N/A	6	FluentPro ...	10/5/2020
Implement a better management tool	Active	1	Medium	Very Low	Low	High	Very Low	9	FluentPro ...	10/5/2020
Implement a better change management	Selected	1	Very High	Low	Low	Medium	Low	8	FluentPro ...	10/5/2020

CREATING A NEW IDEA

To **create a new idea**, perform the following:

1. In the Ideas section click **New** on the toolbar.
2. Provide the following details for your new Idea:
 - a. Enter Name
 - b. Enter Description
 - c. Select a Related Business Challenge from the drop-down
NOTE: only Active business challenges are available in this drop-down.
 - d. Enter Benefits
 - e. Specify Business Priority using the slider
 - f. Enter Expected Effort (hrs)
 - g. Enter Expected Cost (\$)
 - h. Enter Cost Justification
 - i. Enter Expected Benefit (\$)
 - j. Enter Benefit Justification
NOTE: all Ideas are created at Draft stage by default, only user with BCI Manager can change the idea stage.
3. Click **Save**.

After a Draft idea is saved, Decision Matrix section appears.

Decision Matrix section - helps to make decisions as for ideas efficiency and benefits for your organization. You can set Impact, Risk, Cost, Revenue and Efforts values for your idea and based on the given values manager will decide whether it is worth to continue with this idea.

The screenshot shows a user interface for adjusting idea parameters. It features five horizontal sliders, each with a circular knob. From top to bottom, the sliders are labeled: Impact (set to Very Low), Risk (set to Low), Cost (set to Medium), Revenue (set to High), and Efforts (set to Very High). Below the sliders, the 'Idea Score' is displayed as '1'. A small lock icon is visible in the bottom-left corner of the interface.

Idea Score will be calculated automatically based on Impact, Risk, Efforts, Cost and Revenue values.

The following formula is used for Idea Score calculation:

$$\text{Idea Score} = \text{Impact}[0\dots5] - \text{Risk}[-2\dots3] - \text{Efforts}[-2\dots3] - \text{Cost}[-2\dots3] + \text{Revenue}[0\dots5]$$

Save the Idea after specifying Risk, Cost, Revenue and Efforts values.

MANAGING AN IDEA

Users with **BCI Manager** security role can **manage ideas** – edit ideas, including the Stage, delete ideas if necessary.

Available sections in the **Idea Details** form depend on the idea stage:

- **Draft** stage – default stage at which each idea is created. Main details and Decision Matrix sections are available.
- **Active** stage – select this stage from the drop-down and save the idea when idea is ready for voting.
- **Selected** stage – select this stage from the drop-down and save the idea when idea is selected for implementation and project creation.

- **Not Selected** stage – select this stage from the drop-down and save the idea, if idea is not selected for implementation and voting is no longer necessary.

VOTING FOR AN ACTIVE IDEA

When idea is moved to the **Active** stage, **Votes** section in the Idea Details appears enabling each team member to **vote for the ideas** they like:

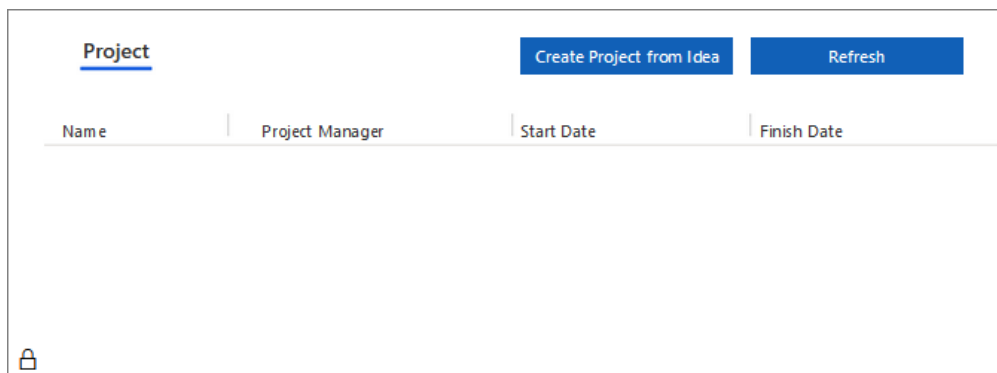


Click **Like** to vote for the idea.

NOTE: Any user with BCI Manager or BCI Member security role can vote once for each idea.

CREATING A PROJECT FROM AN IDEA

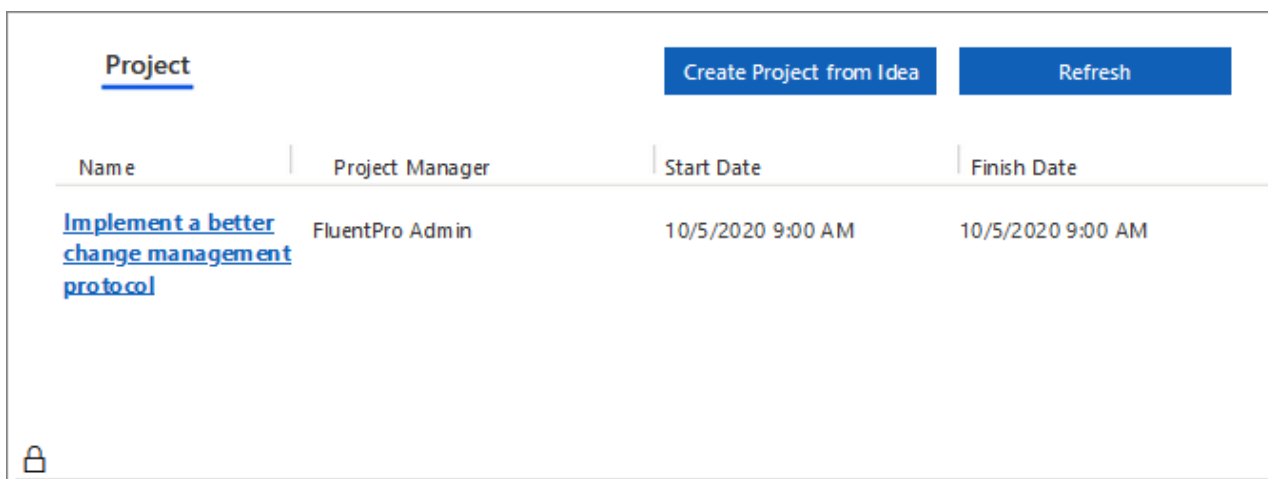
When idea is moved to the **Selected** stage, **Project** section in the **Idea Details** appears enabling the manager to **create a project in Project for the Web** from this idea:



Click **Create Project from Idea** button to create a project in Project for the Web.

Click **Refresh** button if project information did not appear in the table after several seconds after clicking Create Project for Idea button.

Project Name field will be populated with the Idea Name value, Project Manager field will be populated with the Project creator name.



The screenshot shows a web interface for project management. At the top left, there is a tab labeled "Project". To the right of the tab are two blue buttons: "Create Project from Idea" and "Refresh". Below the buttons is a table with the following columns: "Name", "Project Manager", "Start Date", and "Finish Date". The table contains one row of data. The "Name" column contains a blue hyperlink: "Implement a better change management protocol". The "Project Manager" column contains the text "FluentPro Admin". The "Start Date" column contains "10/5/2020 9:00 AM". The "Finish Date" column contains "10/5/2020 9:00 AM". In the bottom left corner of the table area, there is a small lock icon.

Name	Project Manager	Start Date	Finish Date
Implement a better change management protocol	FluentPro Admin	10/5/2020 9:00 AM	10/5/2020 9:00 AM

Click on the **project name** link to open the project in **Project for the Web**.