


# How to - Use the Idea Board

## What is an 'idea' in Jalapeno?

An idea, created in Jalapeno, is a proposed business change, improvement or innovation.

Once created, an idea can be developed through a lifecycle of stages during which it is described, evaluated, justified and delivered. As such, an idea is in fact the initial incarnation of a business outcome. For this reason, ideas are instances of the meta-class BUSINESSOUTCOME.

## Where can I create ideas in Jalapeno?

Ideas can be created by clicking on the lightbulb icon  shown in the top right corner of the Jalapeno window.

To better understand how to create ideas, view this [guide](#)

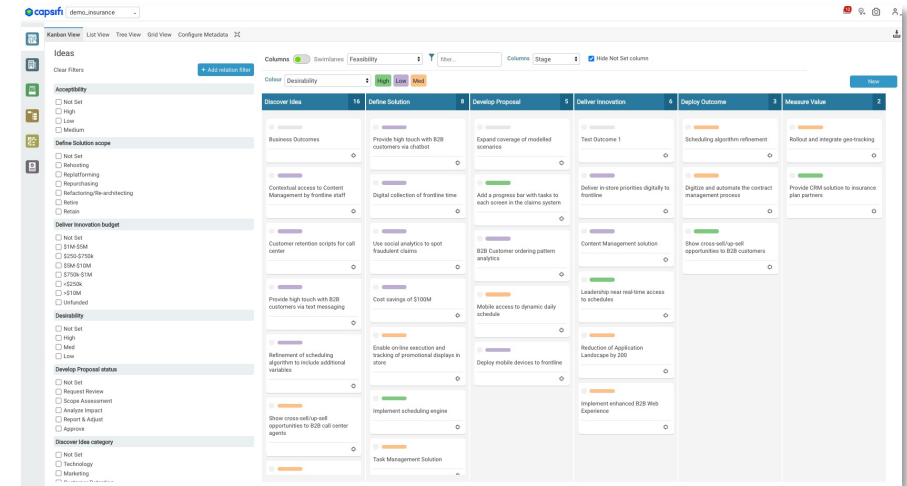
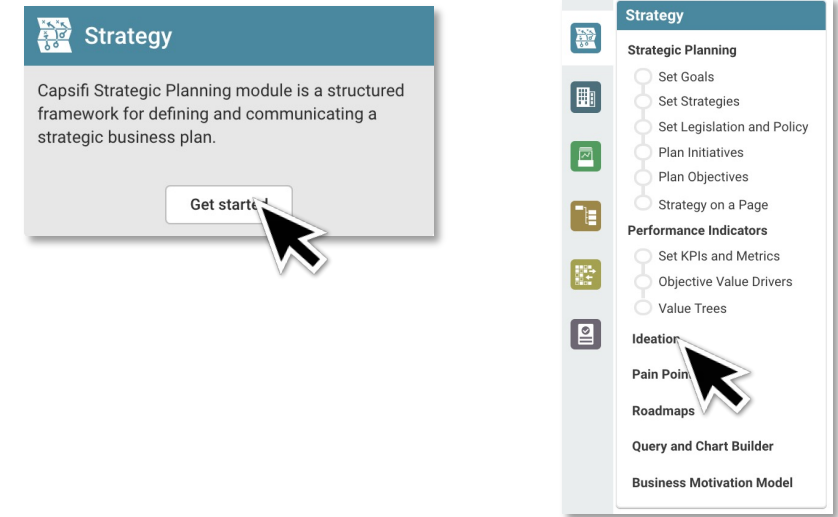
## How can I manage an idea through its lifecycle?

The *Idea Board* provides a view of ideas organized by lifecycle stage.

**Navigation Path:** Strategy > Ideation > Kanban Board

The Idea Board allows the viewer to;

- Filter, organize and color-code ideas according to their needs.
- Progress ideas through lifecycle stages to reflect their stage of development or maturation
- Add information to ideas as they are developed
- Record actions or decisions taken in relation to an idea
- Review the information captured for an idea at each of the lifecycle stages

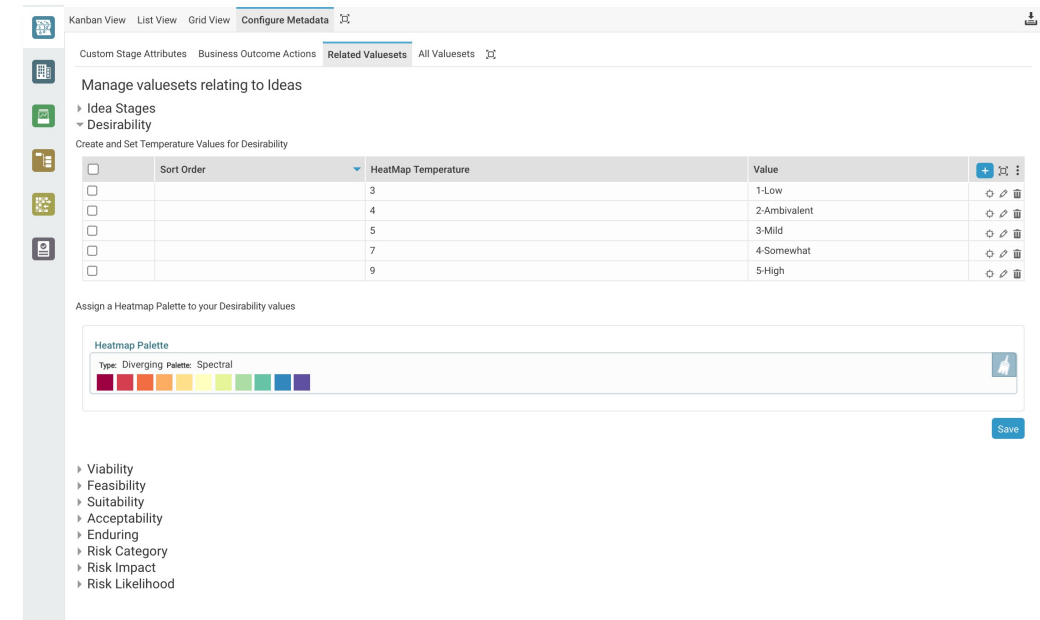


# How to - Use the Idea Board

## What parts of the idea board may be configured?

1. The stage names of the idea board may be changed, but the number of stages are fixed.
2. Additional custom attributes specific to each stage may be added to each stage.
3. The set of actions available for selection may be configured (action names and number of actions).
4. The values of classification metadata may be specified (names and colors for heat-mapping) for the following;
  - a. Desirability
  - b. Feasibility
  - c. Viability
  - d. Suitability
  - e. Acceptability
  - f. Enduring
  - g. Risk Category
  - h. Risk Impact
  - i. Risk Likelihood

Instructions on how to configure these areas are contained within this guide.



# How to - Use the Idea Board

## What is the lifecycle of a business outcome in Jalapeno?

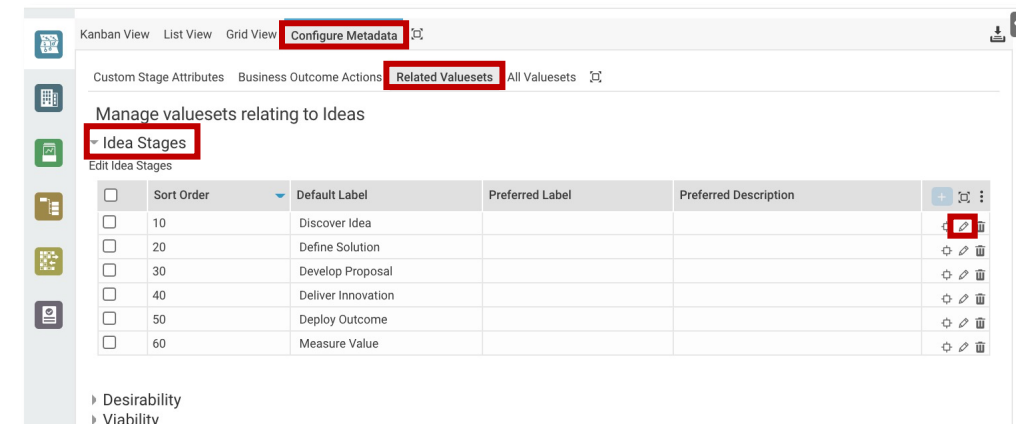
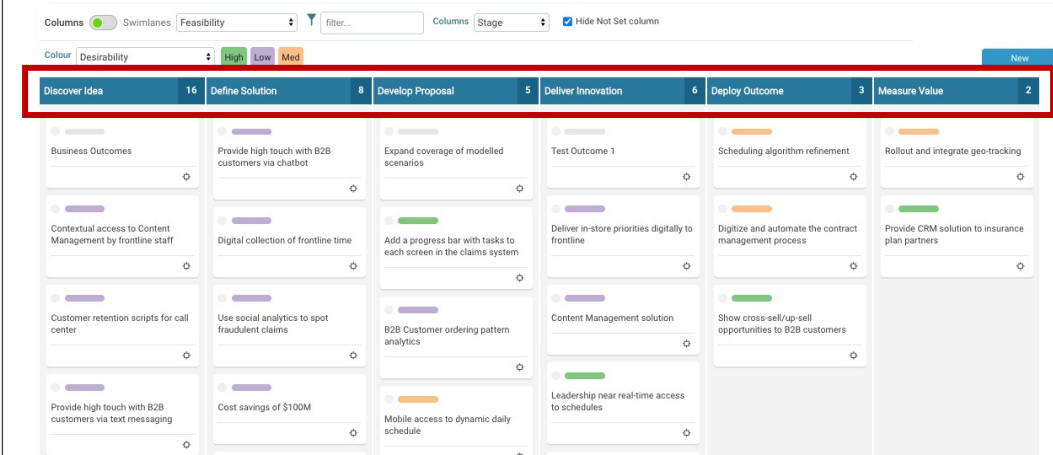
The business outcome lifecycle stages are outlined below. Lifecycle stage names may be edited but the number of stages cannot be modified.

Stage Order	Stage	Stage Description
1	<i>Discover Idea</i>	Describe your Idea in the form of a User Story and Align it with related business model concepts
2	<i>Define Solution</i>	Designate the Prioritization Scores for your Idea and identify Customer Values to aid Idea selection for further formalization
3	<i>Develop Proposal</i>	Develop a Business Case proposal for this Idea to gain acceptance into the delivery pipeline
4	<i>Deliver Innovation</i>	Plan and manage the deliverables for this Idea across various Sprints
5	<i>Deploy Outcome</i>	View and manage Outcomes of this Idea across various Initiatives, Programs and Projects
6	<i>Measure Value</i>	Demonstrate the measurable impact of the implemented Idea

(Note: the column “Not Set” is not considered as a lifecycle stage. Ideas occupying the “Not Set” column have an undefined lifecycle stage. The ‘Not Set’ column can be hidden/revealed using the checkbox ☒ Hide Not Set column )

## How do I change the idea lifecycle stage names?

1. Navigate to Idea Stages value set using the following path: Configure Metadata tab > Related Valuesets sub-tab > Idea Stages section.
2. Edit the default label in the relevant grid row by selecting the edit icon. ✎ Remember to save the row by clicking the save button at the end of the row 💾



# How to - Use the Idea Board

## What does the Idea Board show?

The Idea Board shows ideas as card items in a Kanban-style format. By default, the columns in the board represent the business outcome lifecycle stages. Ideas are located in their current lifecycle stage (column).

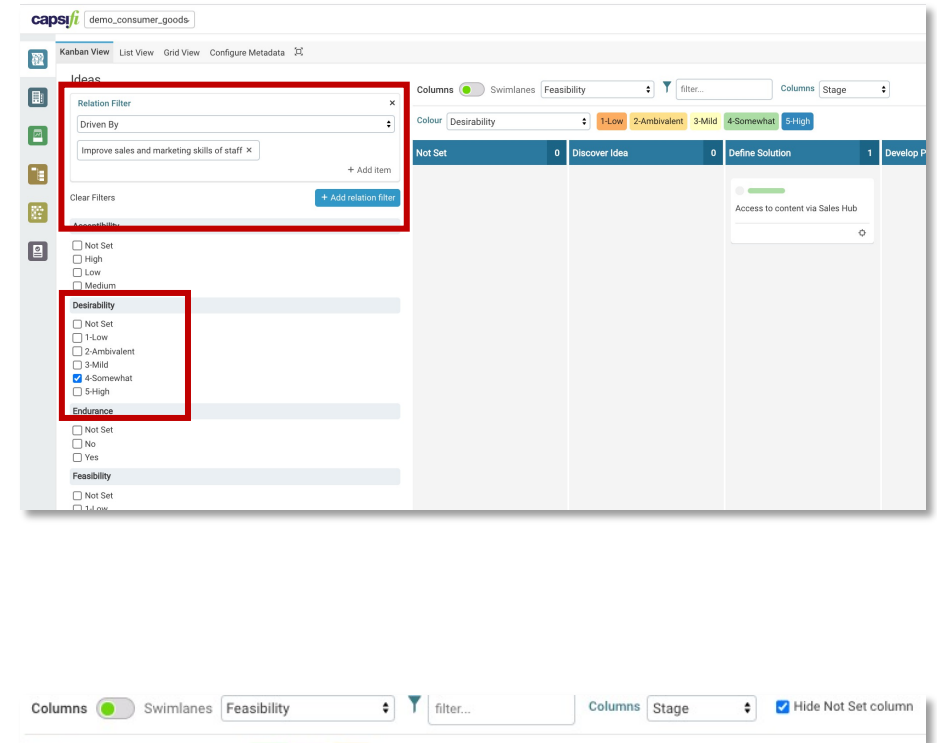
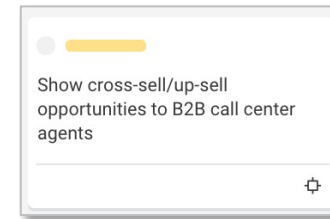
## How can I modify what the board shows?

Ideas in the board can be filtered using the facet filters provided to the left of the board. Filtering can be via attribute values, and/or via the selected of related items.

(in the example shown on the right, the ideas have been filtered to show only those ideas related to the business driver “Improve sales and marketing skills of staff” and having a Desirability rating of “Somewhat”)


Above the board, controls are provided for the following;

- Selection of the property represented as columns in the board
- Enable / disable horizontal grouping of ideas in ‘swimlanes’
- Selection of the property to be used for ‘swimlane’ grouping
- Text-based filtering on related items where a relation property is selected in the column/swimlane selector
- Selection of the property to be surfaced as a colour on the idea cards
- Hide / show the ‘Not Set’ column



# How to - Use the Idea Board

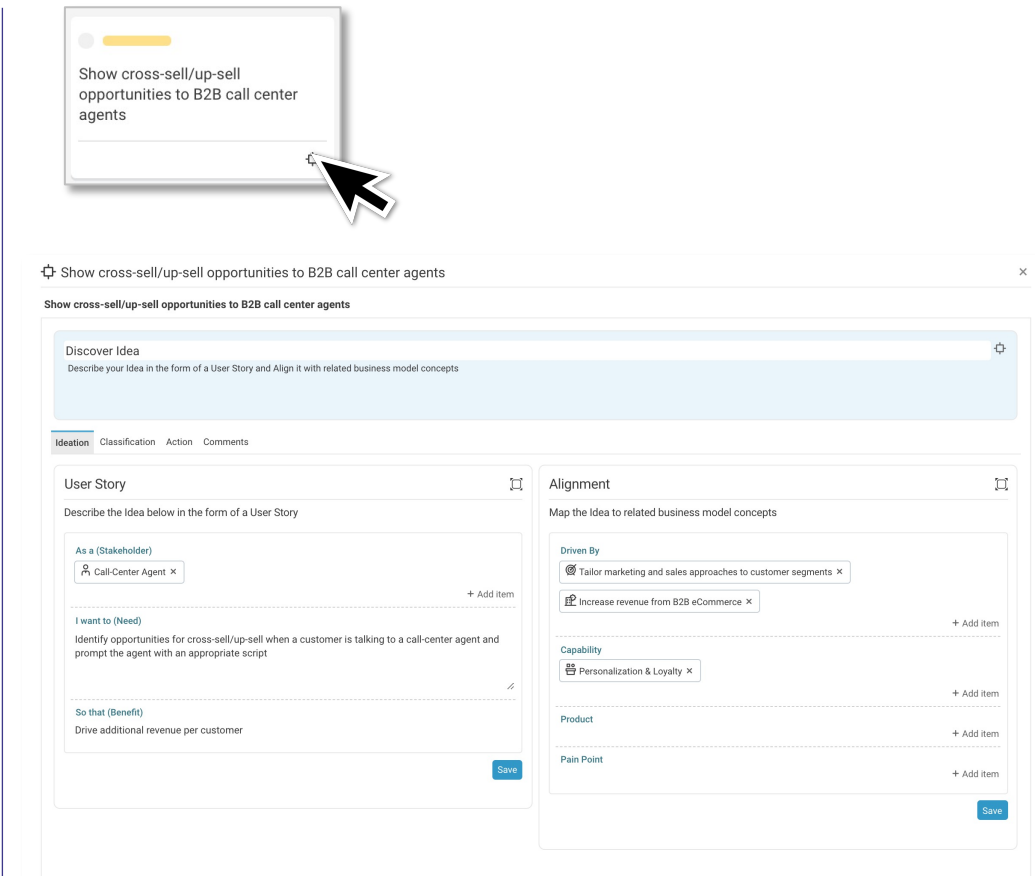
## How can I see the detail of an idea?

To view the detail for an idea, click on the icon  on the idea card. A dialog will open indicating the lifecycle stage for the idea and containing multiple tabs. The tabs presented depend on the current lifecycle stage for the idea, with the following tabs being available for all lifecycle stages;

<i>Classification</i>	Shows any customer attributes configured for this idea stage.
<i>Action</i>	Shows a summary of actions taken for the idea, allows the capture of an action for the idea within the current stage
<i>Comments</i>	Shows all comments recorded for the idea
<i>Flashback*</i>	Shows a summary of information captured do date for the idea

\* The *Flashback* tab is not available in the lifecycle stage *Discover Idea*.

(Note: the column “Not Set” is not considered as a lifecycle stage. Ideas occupying the “Not Set” column have an undefined lifecycle stage)

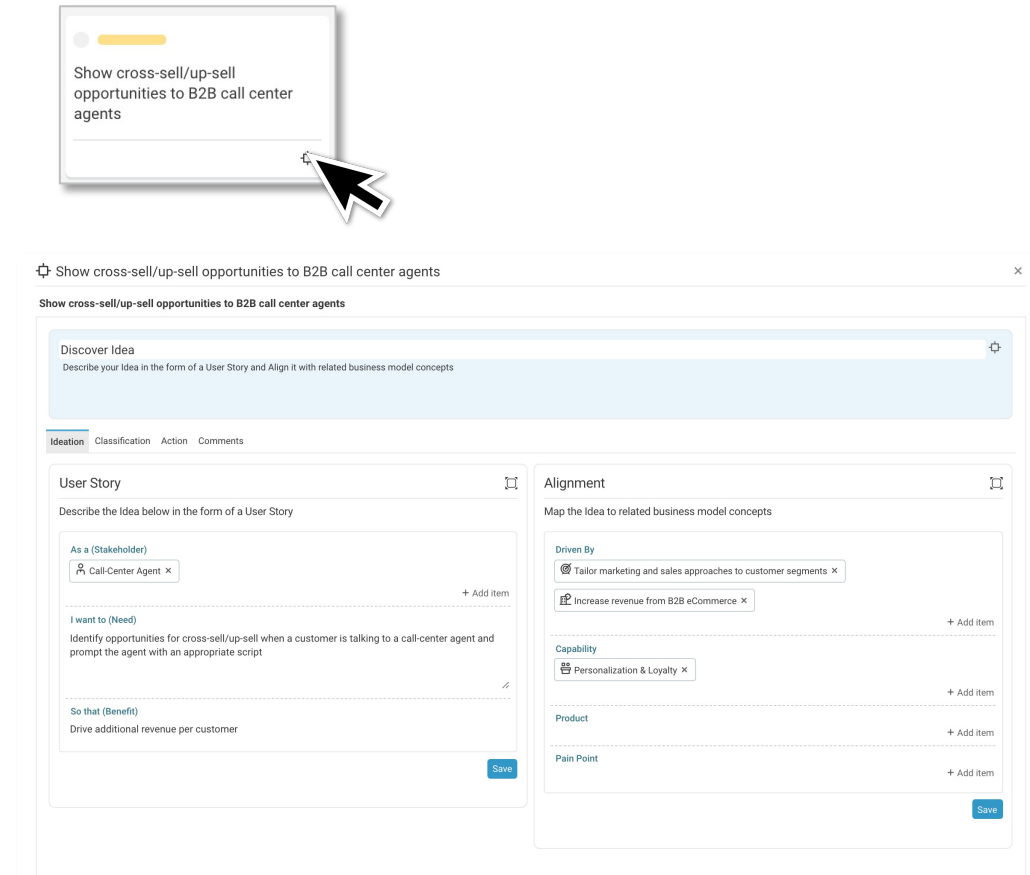


# How to - Use the Idea Board

## What bearing does the lifecycle stage have on the ideas in that stage?

The lifecycle stage in which an idea is situated determines the set of information that can be captured and viewed for the idea when the idea is inspected.

Lifecycle Stage	Tab	Tab Purpose
Discover Idea	Ideation	Articulate the idea, the need it addresses, and how it aligns to other business model elements
Define Solution	Priority Scoring	Rating of the idea to allow comparison against alternatives
	Customer Value	Show the impact of the idea on existing value propositions and offerings
Develop Proposal	Summary	Framing of the idea as an outline business case
	Scope	The work packages (epics) identified as the scope of work to deliver the business outcome
	Schedule	Presents a roadmap view of the planned work
	Team	Lists the individuals assigned to the implementation of the idea
	Estimation	Breakdown of the estimated and actual costs for implementation of the idea
Deliver Innovation	Delivery Plan	Sequencing of planned work relating to the idea
	Delivery Progress	A view of the current status of implementation work
Deploy Outcome	Project Summary	Summary view of the project implementing the idea
	Related Value Streams	Overview of the impacted value stream(s)
	Related Processes	Overview of impacted process(es)
Measure Value	No stage-specific tabs	n/a



✦ Show cross-sell/up-sell opportunities to B2B call center agents

Show cross-sell/up-sell opportunities to B2B call center agents

Discover Idea  
Describe your idea in the form of a User Story and Align it with related business model concepts

Ideation Classification Action Comments

User Story  
Describe the Idea below in the form of a User Story

As a (Stakeholder)  
Call-Center Agent x + Add item

I want to (Need)  
Identify opportunities for cross-sell/up-sell when a customer is talking to a call-center agent and prompt the agent with an appropriate script

So that (Benefit)  
Drive additional revenue per customer

Alignment  
Map the idea to related business model concepts

Driven By  
Tailor marketing and sales approaches to customer segments x  
Increase revenue from B2B eCommerce x + Add item

Capability  
Personalization & Loyalty x + Add item


Product + Add item

Pain Point + Add item

Save

# How to - Use the Idea Board

## How can I move an idea from one stage to another?


An idea may be moved between stages by click+drag on the icon  on the idea card.

## How can I record a decision taken for a given idea?

To record a decision taken on an idea, click on the icon  shown on the idea card.

In the dialog displayed, select the *Action* tab.

Under the header *Add Stage Action*, select the Stage and Action values that reflect the decision being recorded.

Click on the button  to save the action

(Note: the set of available actions must first have been configured – see the following page in this guide)

## How can I see what actions/decisions have been recorded for a selected idea?

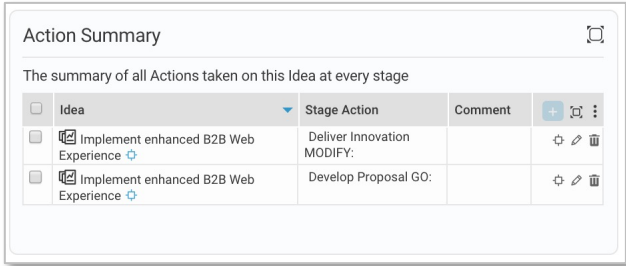
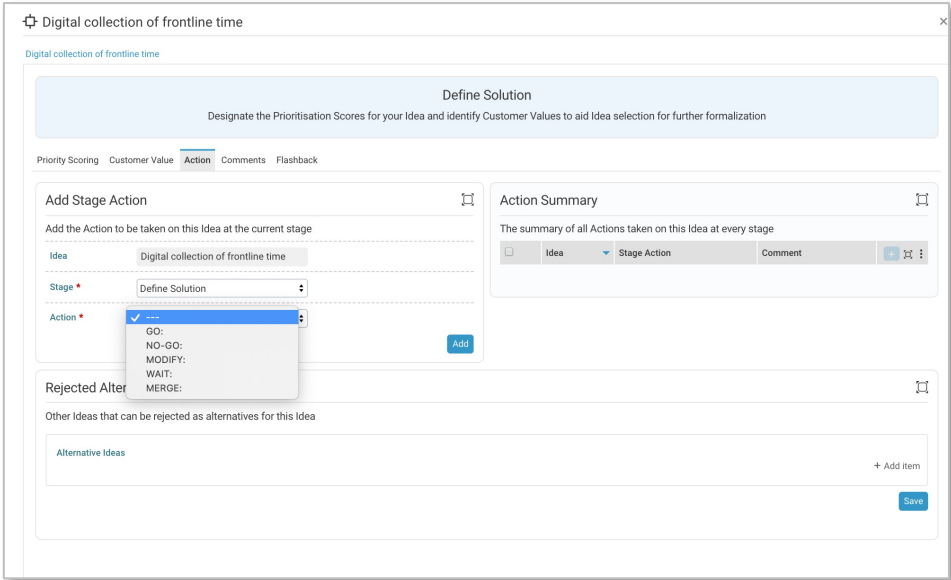
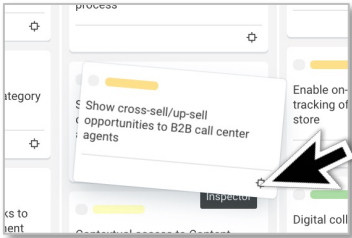
To record a decision taken on an idea, click on the icon  shown on the idea card.

In the dialog displayed, select the *Action* tab

Under the header *Action Summary*, previously recorded decisions for the idea are listed.

## Is there an interdependency between moving an idea card between stages, and recording an action against the idea?




In the current version of the Idea Board, the two operations are independent.





# How to - Use the Idea Board

## How do I add custom attributes specific to each stage?

1. Navigate to the Configure Metadata tab > Custom Stage Attributes subtab.
2. Select the stage for which you'd like to define a custom stage attribute.
3. Using the grid select the add row  button to add a row into the table. Each row represents a single custom stage attribute.
4. Enter a label, an optional description for the attribute and a range (the format of the attribute). Click the save button  at the end of the row.
5. To edit a custom stage attribute that has already been created, repeat steps 1 – 2, select the edit icon  at the end of the row which you would like to edit and repeat step 4.

To better understand how to use grids within Jalapeno, view this [guide](#).

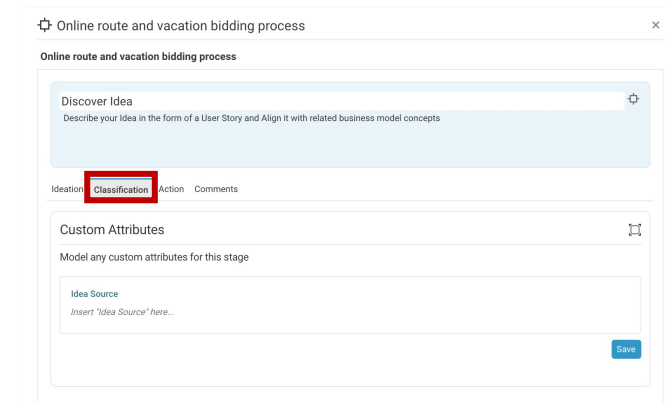
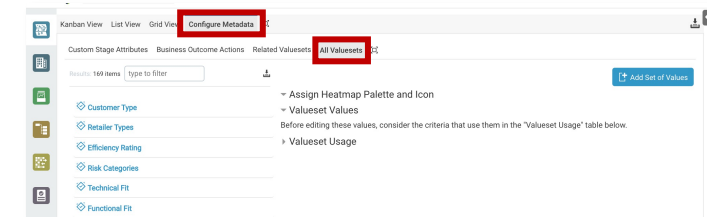
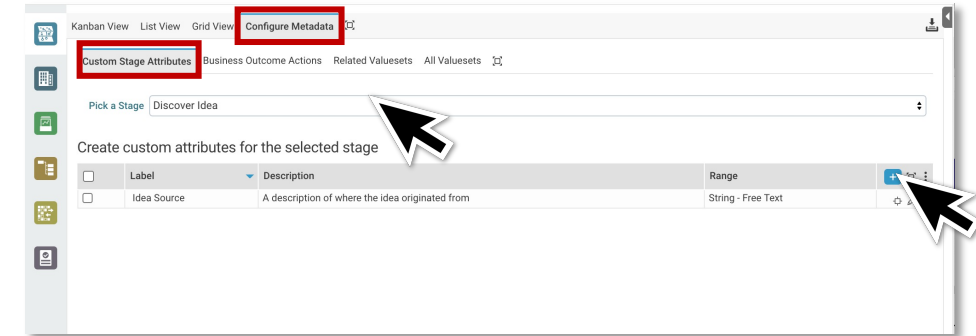
## Can a custom attribute be a selectable and heat-mappable value?

Yes. You may select a value set as a range of a custom attribute. Value sets may be maintained in the All Valuesets subtab. To navigate to the All Valuesets subtab, go to Configure Metadata tab > All Valuesets subtab.

For information on how to use value sets, view this [guide](#).

## Where can I view and update the custom attributes in each idea?

The Classification tab with each idea will display the custom attributes that have been set up for the lifecycle stage in which the idea is found. If no custom attributes have been set up, the Custom Attributes tab will be blank.





# How to - Use the Idea Board


## How do I configure the values by which I want to categorize my ideas?

Jalapeno provides a number of criteria against which ideas can be scored or categorized.


Initially, the values for each of the criteria are undefined. This is to allow you to define values that reflect your organization's way-of-working.


To define the sets of values, navigate to the Configure tab within the Manage Ideas area.

**Navigation Path:** Strategic Planning > Transformation Planning > Manage Ideas > Configure

An expandable header is shown for each criteria. Expanding a criteria displays a data entry grid. Use the  button to add values (one value per row). The grid columns are as follows;

Sort Order	Numeric value that dictates the order of the values in lists
Heatmap Temperature	Numeric value that maps the value to the selected heatmap palette
Value	The label of the value that will be seen by users.

Below the grid, use the  icon to select a color palette to use with the set of values.

Click on the  button to save the configuration.

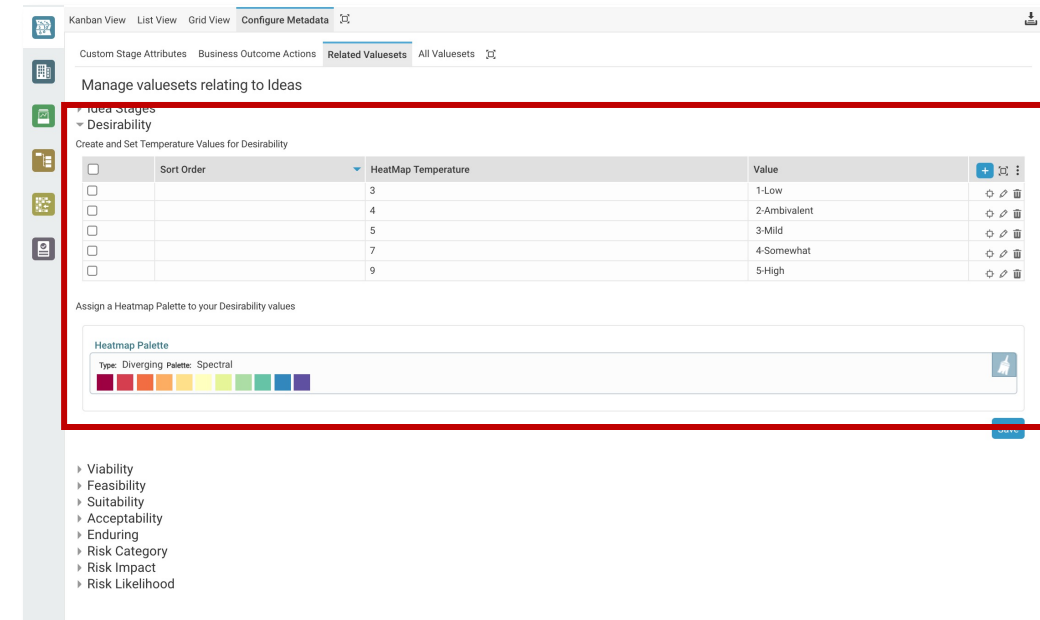
## Is it possible to add new categorization properties (idea meta-data)?

In the current version of the Idea Board, it is not possible to add further categorization properties for display in the Idea Board, or the Idea inspector dialog.

## General Guidance

To better understand how to use value sets, view this [guide](#).

To better understand how to use grids within Jalapeno, view this [guide](#).



# How to - Use the Idea Board

## How do I configure the set of actions that can be recorded against my ideas?

Initially, the set of actions for ideas are undefined. This is to allow you to define actions that reflect your organization’s way-of-working.




To define the actions, navigate to:

Configure Metadata tab > Business Outcome Actions sub-tab.

In the displayed grid, use the  icon to add one new row per action.

For each action, specify a label, a description and an optional sort order.

Label	The name of the action that will be seen by users
Description	The description of the action that will be seen by users
Sort Order	(integer) The order in which the actions will be displayed in the selectable drop-down list. In the absence of a sort order value, the values in the drop-down list will be sorted alphabetically.

Click on the  button to save the new row.  
To edit an existing entry select the edit icon  at the end of the row, make the change and then click the save button .

### General Guidance

To better understand how to use grids within Jalapeno, view this [guide](#).

