

Overview

This Job Aid defines the steps to follow for collaborating on project artifacts, such as issues, risks, decisions, changes, lessons learned, and documents, in Sensei IQ.

Based on organizational policies and your project's specific requirements, you may not use all these project artifacts on your project.

There are six (6) collaboration components available to help you deliver your projects, and each is addressed here.

- Manage project issues
- Manage project risks
- Track project decisions
- Record and manage change requests
- Capture lessons learned
- Manage project documents

With the exception of managing project documents, the other 5 function in a similar fashion and if you are comfortable with one, you may not need to review the other components of this document.

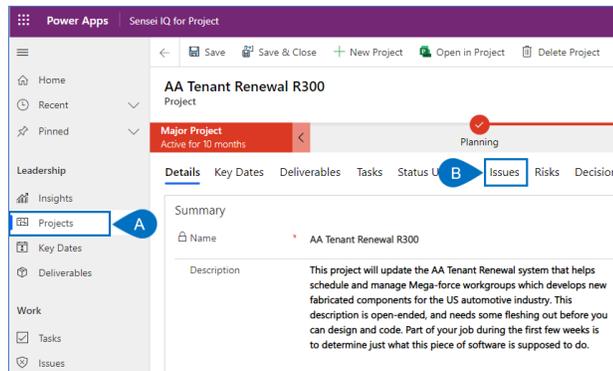
Manage project issues

 **Project Manager**

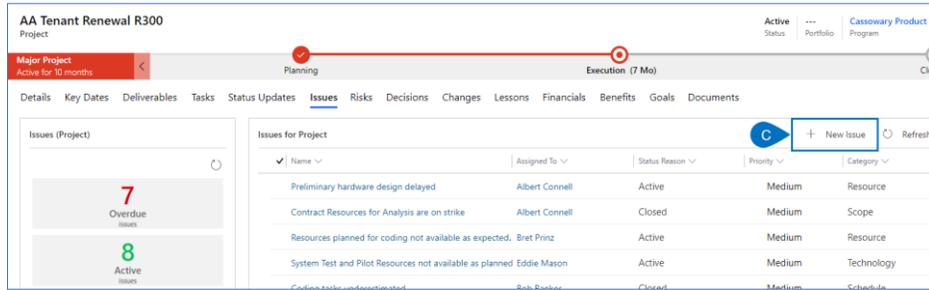
 **Project IQ – Issues tab**

1. CREATE NEW ISSUE

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Issues** tab.

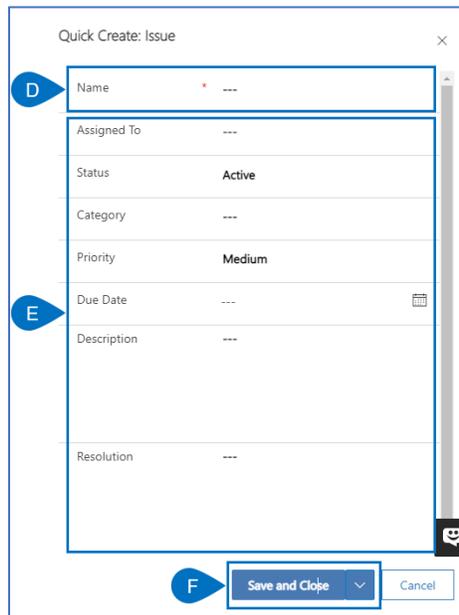


- d. Click **+New Issue**.



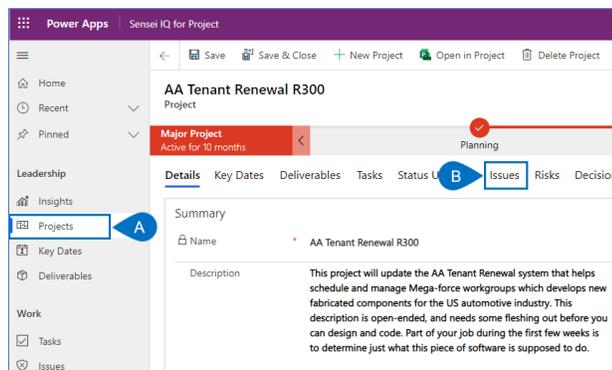
e.

- f. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the issue in screens, reports, and dashboards.
- g. Provide additional details in the remaining fields.
- h. Click **Save and Close**.



2. UPDATE ISSUES

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Issues** tab.



c.

- d. Click on the **Issue** to be updated from the list.

Name	Assigned To	Status Reason	Priority	Category	Due Date
Preliminary hardware design delayed	Albert Connell	Active	Medium	Resource	---
Contract Resources for Analysis are on strike	Albert Connell	Closed	Medium	Scope	17-Apr-20
Resources planned for coding not available as expected.	Bret Prinz	Active	Medium	Resource	18-Jun-20
System Test and Pilot Resources not available as planned.	Eddie Mason	Active	Medium	Technology	19-Jun-20
Coding tasks underestimated	Bob Banker	Closed	Medium	Schedule	19-Jun-20
Deployment Logistics tasks underestimated	Albert Connell	Active	High	Business Process	25-Jun-20
Hardware Vendor not compliant with new Industry Stanc	Bret Prinz	Active	Medium	Vendor	26-Jun-20

e.

- f. Update any field, as required.
- g. Click **Save & Close**.

Manage project risks

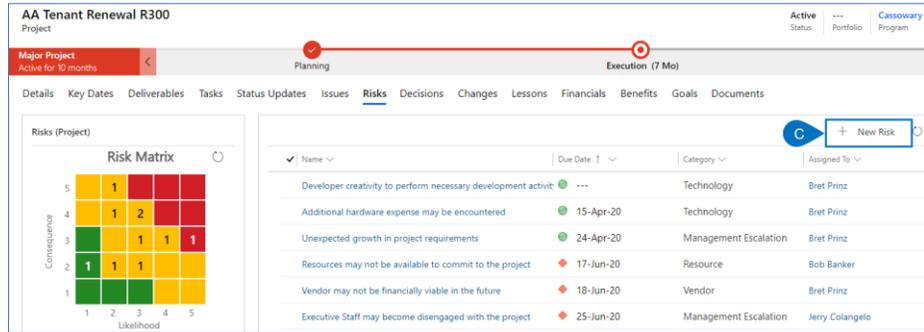
Project Manager

Project IQ – Risks tab

1. CREATE NEW RISK

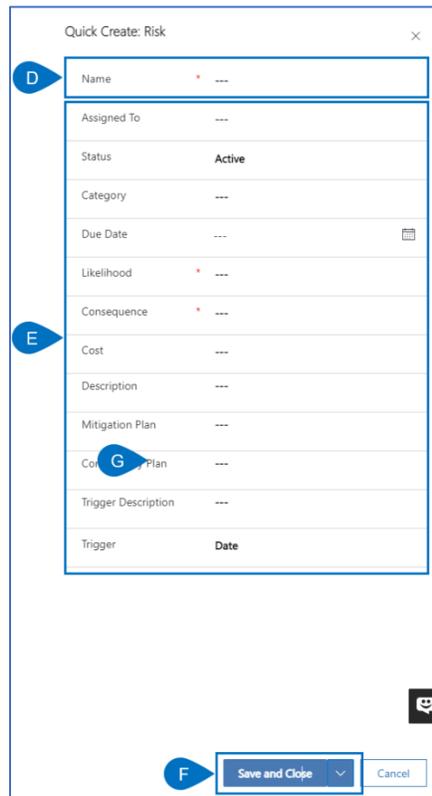
- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Risks** tab.

- d. Click **+ New Risk**.



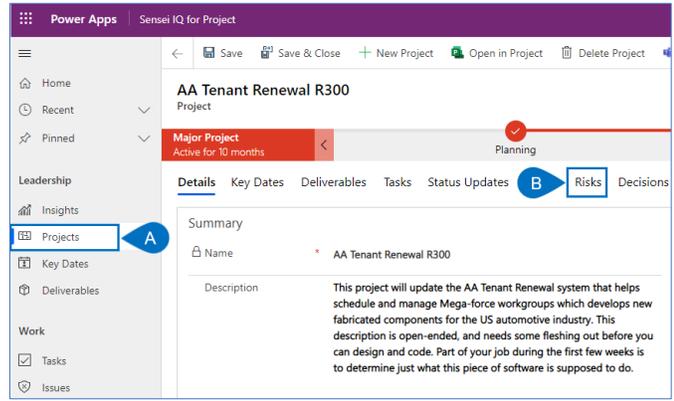
e.

- f. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the risk in screens, reports, and dashboards.
- g. Provide additional details in the remaining fields.
- h. Click **Save and Close**.



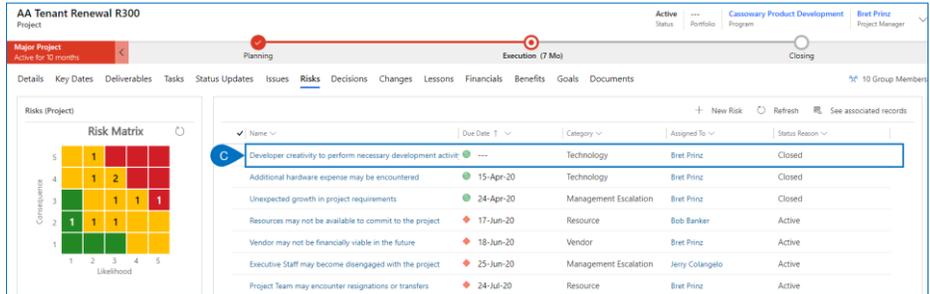
2. UPDATE RISKS

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Risks** tab.



c.

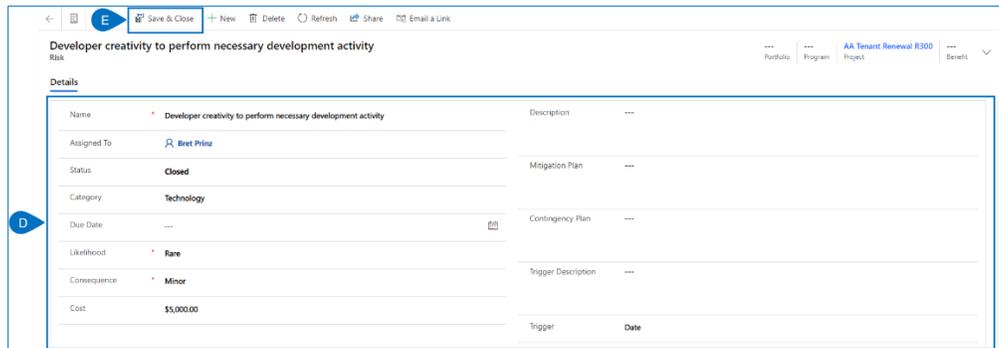
d. Click on the **Risk** to be updated from the list.



e.

f. Update any field, as required.

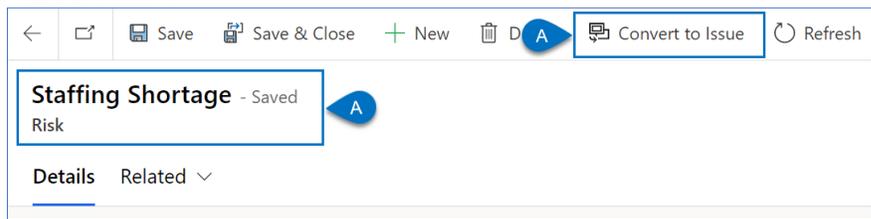
g. Click **Save & Close**



3. CONVERT RISK TO AN ISSUE

a. Ensure you have the **appropriate risk open**.

b. Click the **Convert to Issue** button.



c.

d. **Update any fields** as needed and click **Save and Close**

Quick Create: Issue ✕

Name * **Staffing Shortage**

Assigned To Albert Connell

Status **Active**

Category **Resource** B

Priority **Medium**

Due Date --- 📅

Description **Staff are had to find and projected to get worse.**

Resolution ---

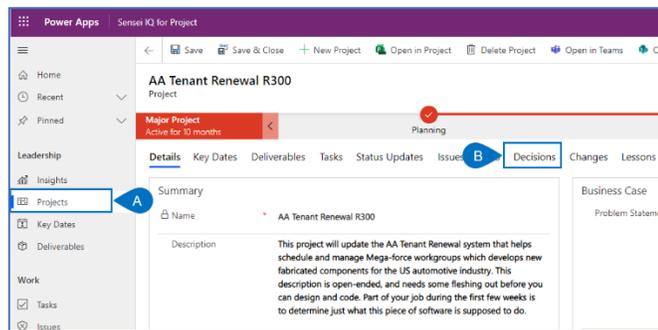
Track project decisions

Project Manager

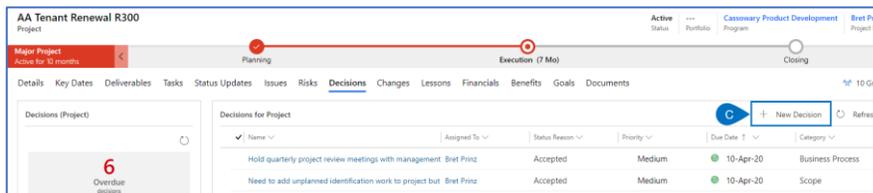
Project IQ – Decisions tab

1. CREATE NEW DECISION

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Decisions** tab.



- d. Click **+ New Decision**.



- e.
 - f. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the decision in screens, reports, and dashboards.
 - g. Provide additional details in the remaining fields.
 - h. Click **Save and Close**.

Quick Create: Decision

Name * ---

Description ---

Status **Active**

Priority **Medium**

Due Date ---

Category ---

Escalation Required **No**

Escalation Manager ---

Decision Date ---

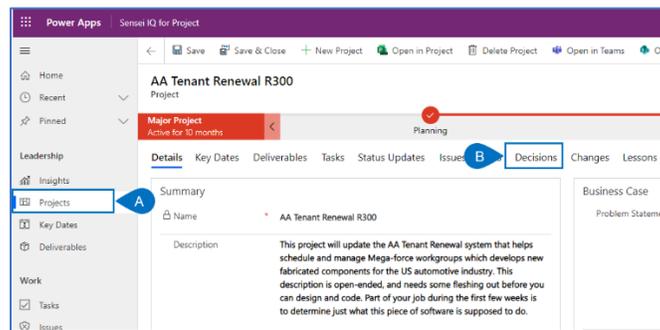
Approver ---

Assigned To ---

Save and Close Cancel

2. UPDATE DECISIONS

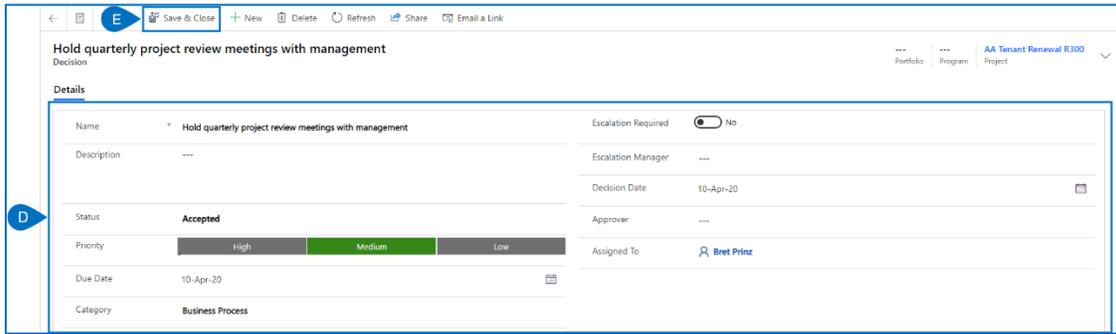
- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Decisions** tab.



- c. Click on the **Decision** to be updated from the list.

Name	Assigned To	Status Reason	Priority	Due Date	Category
Hold quarterly project review meetings with management Bret Prinz	Bret Prinz	Accepted	Medium	10-Apr-20	Business Process
Need to add unplanned identification work to project but Bret Prinz	Bret Prinz	Accepted	Medium	10-Apr-20	Scope

- d. Update any field, as required.
- e. Click **Save & Close**.



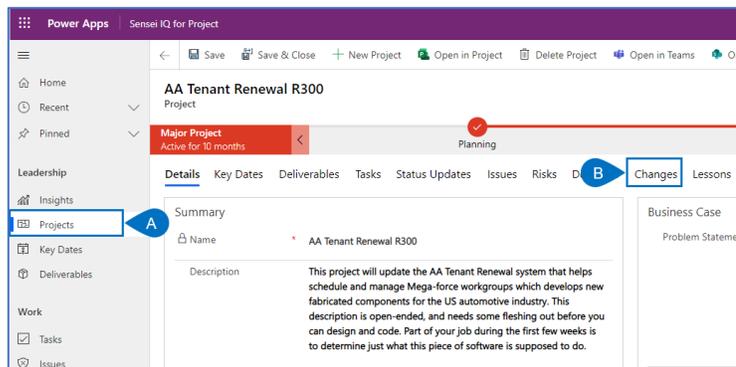
Record and manage change requests

Project Manager

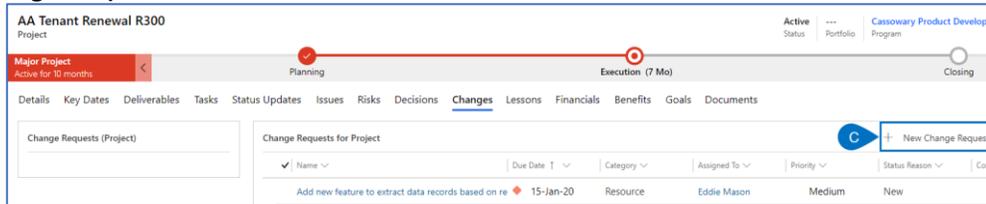
Project IQ – Changes tab

1. CREATE NEW CHANGE REQUEST

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Changes** tab.



- c. Click **+ New Change Request**.



- e.
 - f. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the Change Request in screens, reports, and dashboards.
 - g. Provide additional details in the remaining fields.
 - h. Click **Save and Close**.

i.

2. UPDATE CHANGE REQUESTS

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Changes** tab.

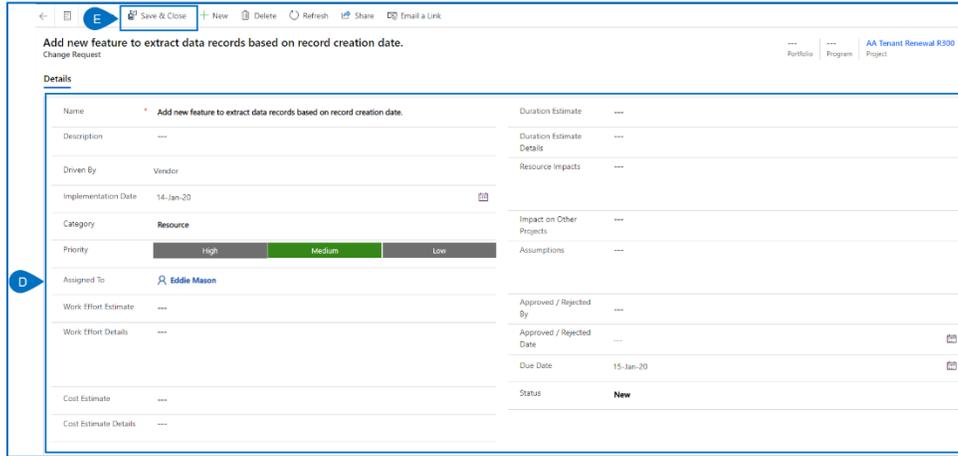
c.

- d. Click on the **Change Request** to be updated from the list.

Name	Due Date	Category	Assigned To	Priority	Status Reason	Cost Estimate
Add new feature to extract data records based on re	15-Jan-20	Resource	Eddie Mason	Medium	New	---
Evaluate need for additional Analysis of Current Envir	13-Mar-20	Schedule	Steve Router	Medium	Approved	\$0.00

e.

- f. Update any field, as required.
- g. Click **Save & Close**.



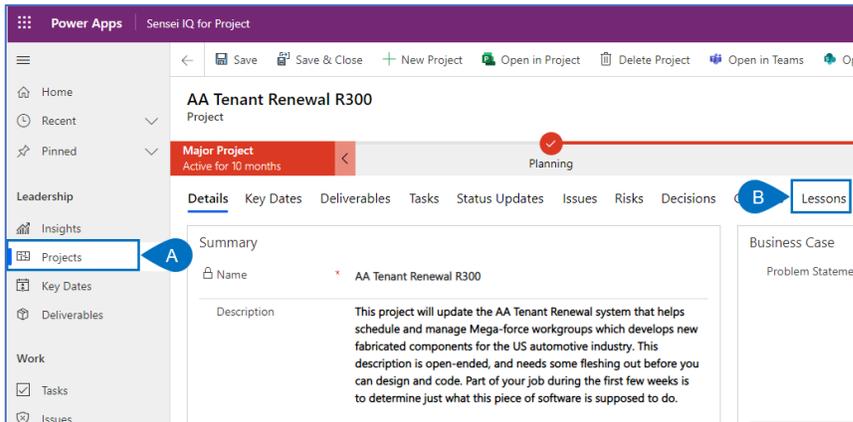
Capture lessons learned

Project Manager

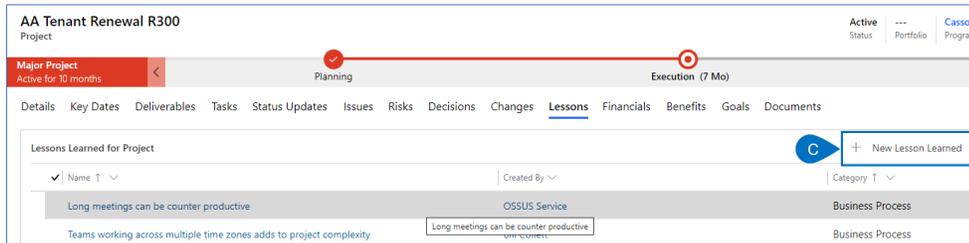
Project IQ – Lessons tab

1. CREATE NEW LESSON LEARNED

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Lessons** tab.



- d. Click **+New Lesson Learned**.



- e.
 - f. Fill in the Name field. It is mandatory and it should be clear and concise to help users identify the Lesson Learned in screens, reports, and dashboards.
 - g. Provide additional details in the remaining fields.
 - h. Click **Save and Close**.

Quick Create: Lesson Learned

Name * ---

Category ---

Status Active

Observation ---

Recommendation ---

Lesson Learned ---

Action Taken ---

Save and Close Cancel

i.

2. UPDATE LESSONS LEARNED

- Ensure you have the appropriate project open in **Project IQ**.
- Click the **Lessons** tab.

Power Apps Sensei IQ for Project

AA Tenant Renewal R300 Project

Major Project Active for 10 months Planning

Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions **Lessons**

Summary

Name * AA Tenant Renewal R300

Description This project will update the AA Tenant Renewal system that helps schedule and manage Mega-force workgroups which develops new fabricated components for the US automotive industry. This description is open-ended, and needs some fleshing out before you can design and code. Part of your job during the first few weeks is to determine just what this piece of software is supposed to do.

Business Case Problem Statement

c.

- Click on the **Lesson Learned** to be updated from the list.

AA Tenant Renewal R300 Project

Active Status Portfolio Program

Major Project Active for 10 months Planning Execution (7 Mo)

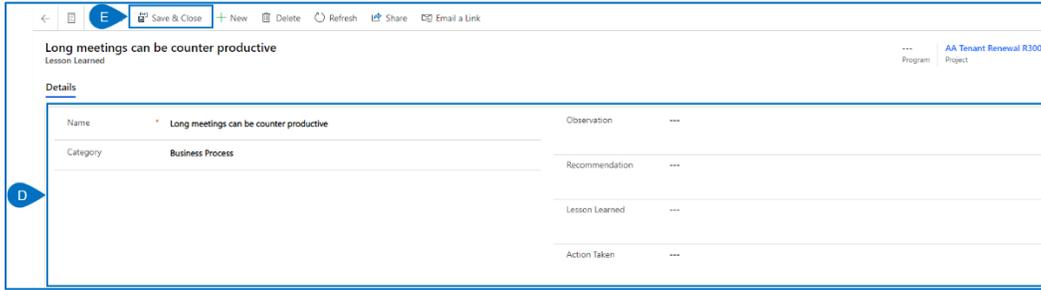
Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions **Lessons** Financials Benefits Goals Documents

Lessons Learned for Project + New Lesson Learned

Name	Created By	Category
Long meetings can be counter productive	OSSUS Service	Business Process
Teams working across multiple time zones adds to project complexity	Bill Collett	Business Process
Key projects resources are in demand by many PMs during the same time periods	Bill Collett	Resource
Project team consistency ensures greater success to a project	Bill Collett	Resource

e.

- Update any field, as required.
- Click Save & Close.



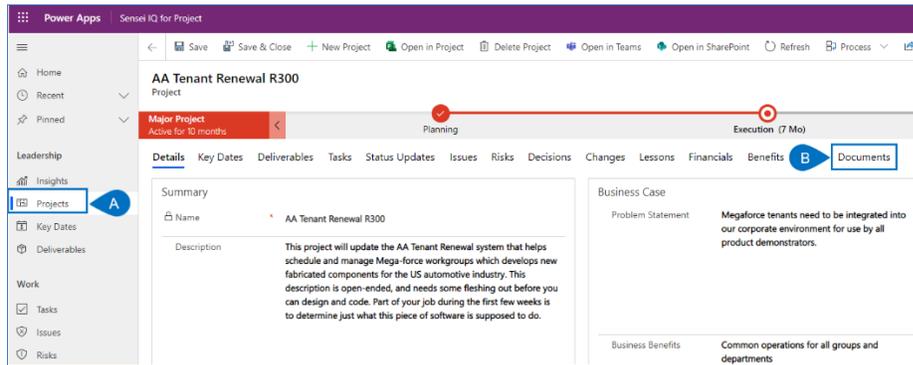
Manage project documents

Project Manager

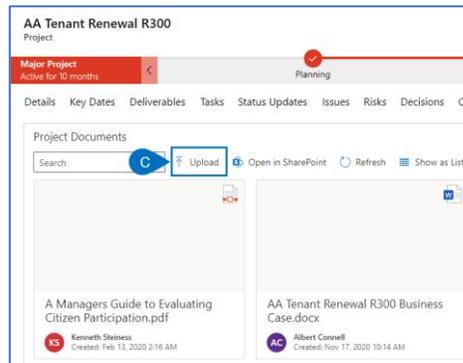
Project IQ – Documents tab

1. UPLOAD NEW DOCUMENTS

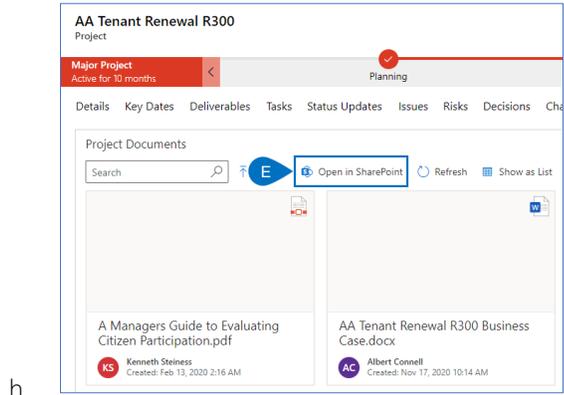
- Ensure you have the appropriate project open in **Project IQ**.
- Click the **Documents** tab.



- Click **+Upload**.



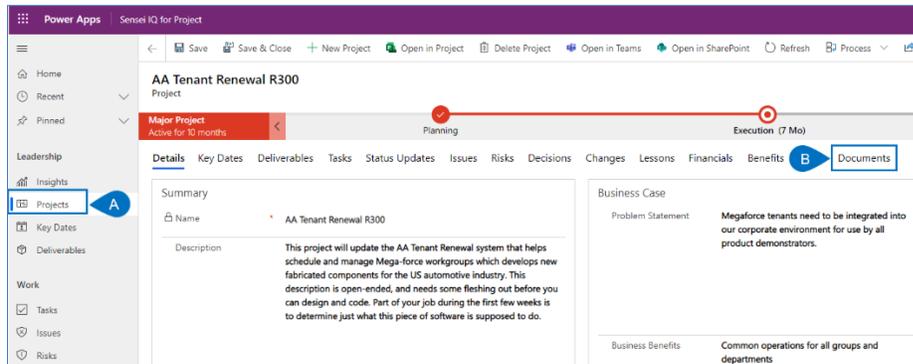
- Browse and select** the new document to be added to the project repository.
- Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.



h.

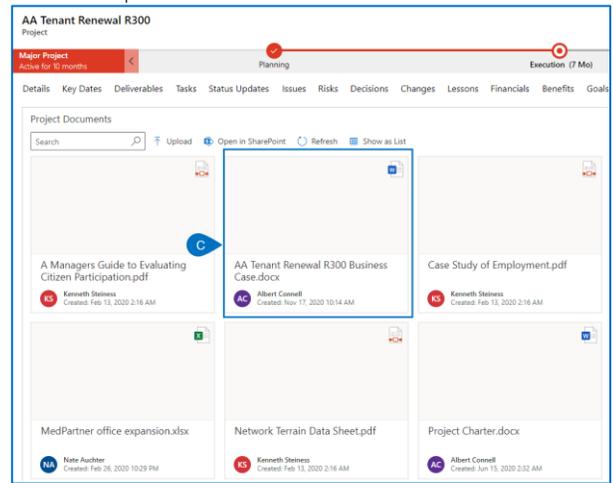
2. VIEW OR UPDATE EXISTING DOCUMENTS

- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Documents** tab.



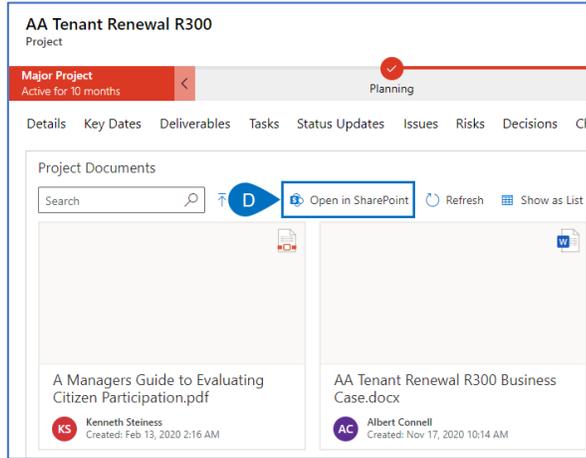
c.

- d. Click on the appropriate document/tile to open it.



e.

- f. Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.



g.