

Overview

This Job Aid defines the steps to follow for finalizing the project plan. This Job Aid is based on the assumption that a new project, complete with the appropriate support details, has been created in Project IQ and that the project schedule has been defined.

The following are six (6) core actions required for finalizing the project plan. These need not be sequential actions and you may skip some based on your project delivery requirements.

1. Validate Key Dates and Deliverables
2. Update resource requests
3. Define the Financial forecast
4. Create the project baseline
5. Advance the project to the next stage
6. Add the project to Microsoft Teams

## Validate Key Dates and Deliverables

 Project Manager

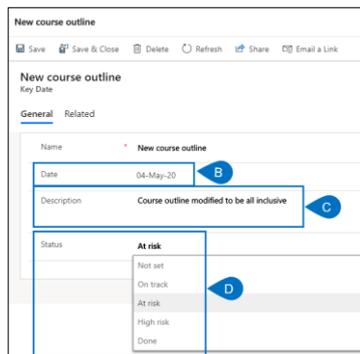
 Project – Key Dates and Deliverables tabs

### 1. UPDATE KEY DATES

- a. From the **Information Grouping** tab, open the **Key Dates** tab for the project and compare the approved dates to the current schedule. If the approved Key Date is different than project schedule, select the **pencil** icon (or double click the Key Date card).



- b. Update the **Date** to reflect the current schedule.
- c. Add any additional details in the **Description** field to better describe the new key date.
- d. Set the **Status** as appropriate based on how much the date has changed from the original expectation.



## 2. UPDATE DELIVERABLES

- a. From the **Tracking Grouping** tab, open the **Deliverables** tab for the project and compare the approved dates to the current Project for the web schedule. If the approved Deliverable date is different than the project schedule, select the **Deliverable row**
- b. Click **Edit** (or double click the Deliverable name).

Name	Category	Assigned To	Due Date	Status Reason
Completion Certificate	Other	Doug Brown	24-Apr-20	Not Started

- c. Update the **Due Date** to reflect the current schedule.
- d. Add any additional details in the **Progress Update** field to better describe the status of the deliverable.

**Training Completion Certificate**  
Deliverable

Driver awareness training refresh  
Project

**General** Related

Name	Training Completion Certificate
Description	---
Progress Update	---

Category	Other
Assigned To	Doug Brown
Due Date	24-Apr-20
Status	Not Started

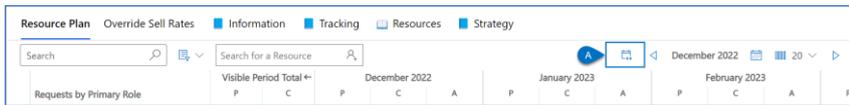
## Update resource requests

Project Manager

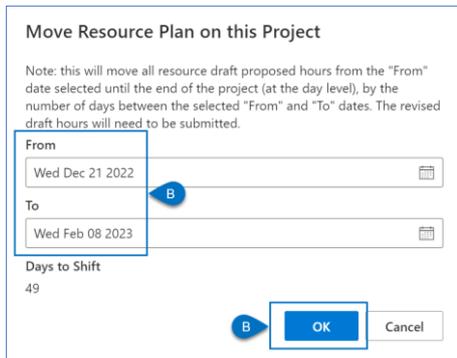
Project - Resource Plan tab

### 1. MOVE THE RESOURCE PLAN TO ALIGN TO THE UPDATED PROJECT SCHEDULE

- a. Select the Shift Resource Request button from the middle of the sub-ribbon to lift and shift the resource requests to reflect the new project start date as required.

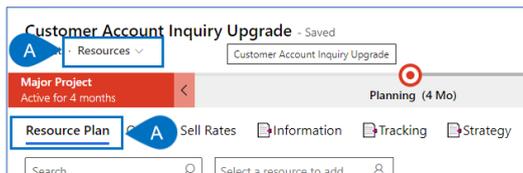


- b. Define the **original project start date** and the **revised start date** and click **OK**.

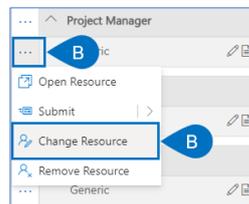


### 2. REPLACE PROPOSAL GENERIC RESOURCES WITH NAMED RESOURCES

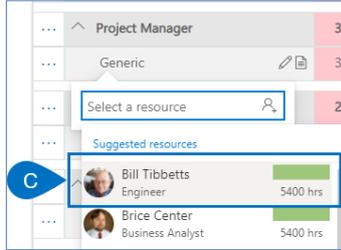
- c. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- d. Select the **ellipsis (...)** to the left of the **Generic Resource** name and select **Change Resource**.



- e. Select the **approved named resource** who will be assigned to your project. The **Resource Heatmap** to the right of each resource will help you **confirm the resource has availability** to work on your project.

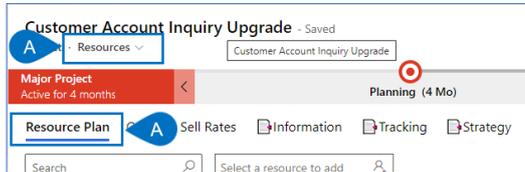


- f. Review and update the **Proposed values** per time period to ensure they reflect the **current project requirements**.

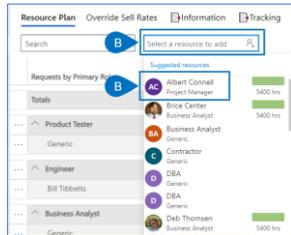
Requests by Primary Role	Visible Period Total		April 2022		May 2022		June 2022		July 2022		August 2022	
	P	C	P	A	P	A	P	A	P	A	P	A
Totals	725.0	0.0	75.0	168.0	175.0	176.0	175.0	176.0	175.0	168.0	125.0	184.0
Engineer	300.0	0.0	75.0	168.0	75.0	176.0	75.0	176.0	50.0	168.0	25.0	184.0
Bill Tibbetts	300.0	0.0	75	168.0	75	176.0	75	176.0	50	168.0	25	184.0

### 3. DEFINE NEW NAMED PROJECT RESOURCE REQUESTS

- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- b. Search for and select the **additional approved named resource** who will be assigned to your project.

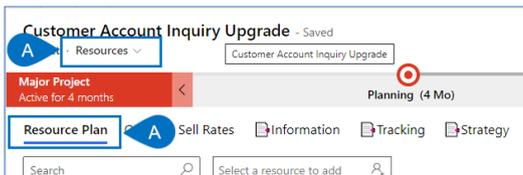


- c. **On a time period basis**, define the **number of hours** you require this new resource on your project.

Requests by Primary Role	Visible Period Total		June 2022		July 2022		August 2022		September 2022	
	P	C	P	A	P	A	P	A	P	A
Totals	1,060.0	0.0	100.0	352.0	200.0	336.0	350.0	368.0	285.0	352.0
Product Tester	375.0	0.0		0.0		0.0	150.0	0.0	150.0	0.0
Generic	375.0	0.0					150		150	
Project Manager	85.0	0.0	25.0	176.0	25.0	168.0	25.0	184.0	10.0	176.0
Albert Connell	85.0	0.0	25	176.0	25	168.0	25	184.0	10	176.0

**4. SUBMIT PROJECT RESOURCE REQUESTS**

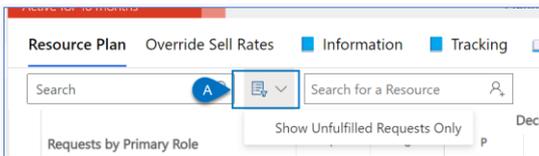
- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- b. Select **Save and Submit** at the bottom of the form to make all the resource request changes available to the **appropriate resource managers**.

**5. IDENTIFY UNFULFILLED RESOURCE REQUESTS**

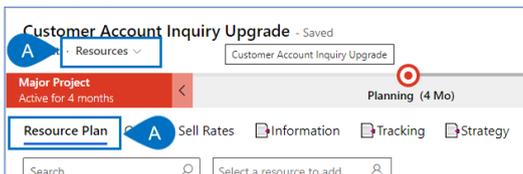
- a. Select the **Unfulfilled Resource Request** button from the left side of the sub-ribbon to **filter the resource request list for any generic resources** requests that don't have an **associated named resource**.



- b. **Work with the resource managers** to get all generic resource requests assigned to named resources.

**6. ADJUST PROJECT BASED ON RESOURCE REQUEST REVIEW RESULTS**

- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



Commented [TK1]: Please correct the numbering here, as I think it should continue from the previous item

- b. Review the **approved resource requests** to identify any changes by Resource Management and be prepared to **adjust the project schedule** and/or **submit additional resource requests** as appropriate.

...	Project Manager	85.0	25.0	15.0	161.0	25.0	30.0	138.0	25.0	30.0	154.0	10.0	10.0	166.0
...	Albert Connell	85.0	25	15.0	161.0	25	30.0	138.0	25	30.0	154.0	10	10.0	166.0

Define the financial forecast

Project Manager

Project – Financials tab

1. CREATE THE PROJECT FORECAST

- a. From the **Information Grouping** tab, Click the **Financials** tab.
- a. Click **+New Cost**.

Cost Category	Overall Total	December 2022	January 2023	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023
<b>Totals</b>									
Budget	\$200,000								
Forecast	\$152,175								
Actual	\$0								
Variance	\$200,000								
<b>Capex</b>									
Budget	\$75,000								
Forecast	\$65,000								
Actual	\$0								
Variance	\$75,000								
<b>Opex</b>									
Budget	\$125,000								
Forecast	\$87,175								
Actual	\$0								
Variance	\$125,000								

- b. Complete the **New Cost** form. The **Name** and **Financial Category** are mandatory.
- c. Click the **Generate Transactions** button.

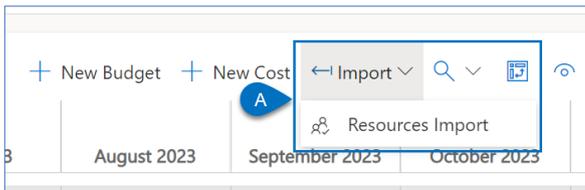
- d. Enter the **Amount to distribute** and the forecast **Start date** and **Number of months**
- e. Next, click **Generate** to have the forecast spread across the desired dates.

- f. **Edit** any individual monthly amount to **contour the forecast**.
- g. Click **+ Add Transaction** to add additional months to the forecast.
- h. Enter the **Date** and **Forecast**.

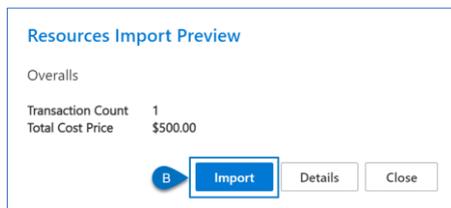
Date	Forecast	Actual	Note
01-Sep-20	\$ 16250	\$	
01-Oct-20	\$ 16250	\$	
01-Nov-20	\$ 16250	\$	
01-Dec-20	\$ 16250	\$	
	\$		
<b>Total:</b>	<b>\$65,000.00</b>	<b>\$0.00</b>	

## 2. IMPORT RESOURCE REQUESTS

- a. Click **+Import** and then **Resources Import**



- b. Review the **import preview** and then click **Import**

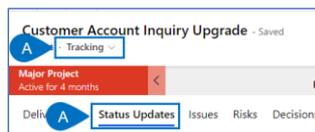


- c. Review the details and **update or remove imported financials** as needed following the instructions above.

## Create the project baseline

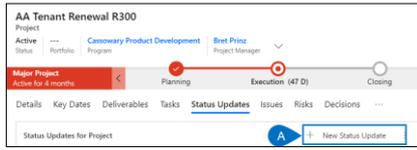
### 1. CREATE THE PROJECT BASELINE

- a. From the **Tracking Grouping** tab, open the **Status Updates** tab.

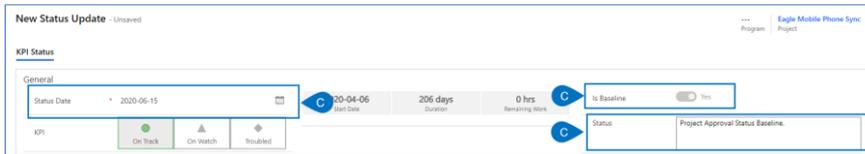


2. SET KPIS AND RECORD STATUS NARRATIVE

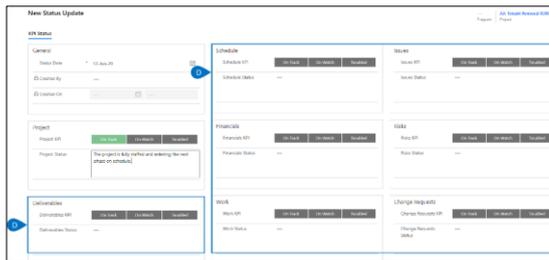
- b. On the **Status Updates** tab for the current project, click **+ New Status Update**.



- c. Create a **new project status update** to reflect the initiation of the new project and to **set the project baseline**. Ensure that the **Is Baseline is set to Yes**. Ensure the **Status Date** is set to reflect the project initiation date.



- d. Set the KPI and provide a status narrative for the other relevant status areas based on your project stakeholders' information requirements.



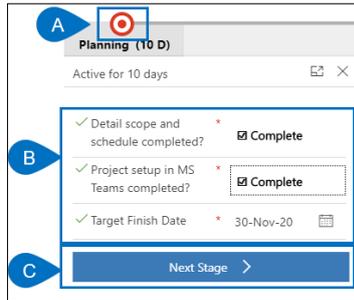
Advance the project to the next stage

Project Manager

Project IQ

### 1. ADVANCE THE PROJECT

- a. Click on the current stage, which is identifiable by the **red dot/red circle** icon.
- b. Validate that you have completed all the **checklist items**.
- c. Next click **Next Stage** to advance the project.



## Create a Microsoft Teams Channel for the project

Project Manager

Sensei IQ

### 1. SETUP TEAMS

- a. Open Microsoft Teams and, select the **Sensei IQ** app from the navigation pane on the left.
- b. Ensure you are on the **Projects** tab.
- c. Select the **Teams** icon for your new project. This will create the appropriate Team and Channel and then open it in Teams.

