Overview

This Job Aid defines the steps to follow for creating a new project in Sensei IQ.

All new projects should be created in Sensei IQ. This allows you to capture key high-level information about the project and most importantly define the Project Type.

There are five (5) core actions required for creating a new project. Define the project is a required action, the remaining actions will be based on your project delivery requirements.

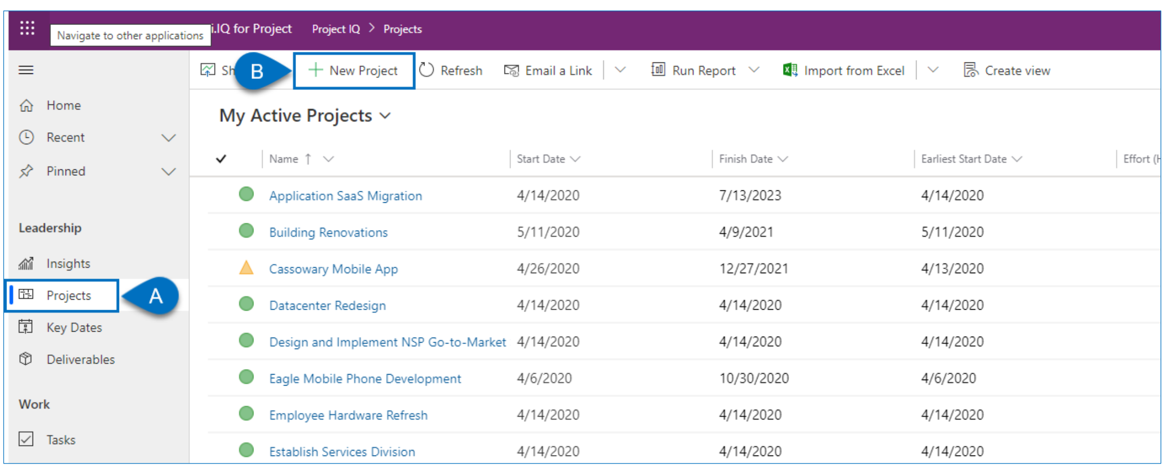
1. Define the project
2. Capture key dates
3. Identify deliverables
4. Create resource requests
5. Record the project budget

Define the project

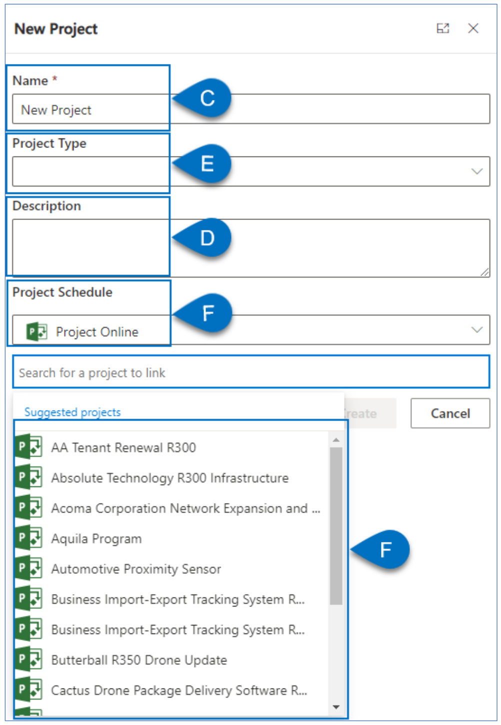
Project Manager | **Projects – New Blank Project**

1. DEFINE THE NEW PROJECT

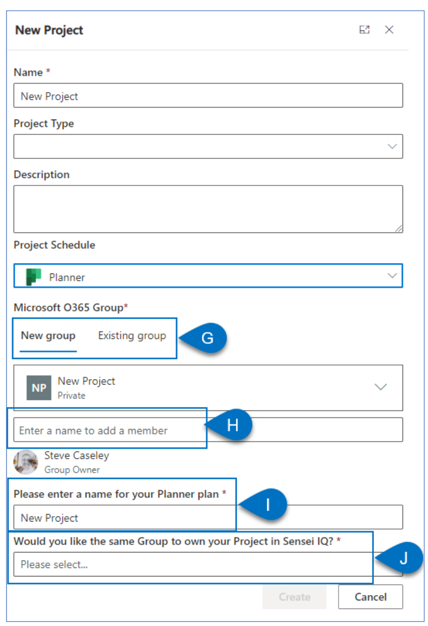
a. Ensure you are in the **Projects area** and click **Projects** in the **Leadership** section.
b. Click **+ New Project** from the command bar.



c. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the project in screens, reports, and dashboards.
d. Provide additional details about the project in the **Description** field.
e. Select the **Project Type** based on organizational standards to define the type of project being created.
f. Select the **Project Schedule** and **External Project** (if appropriate).

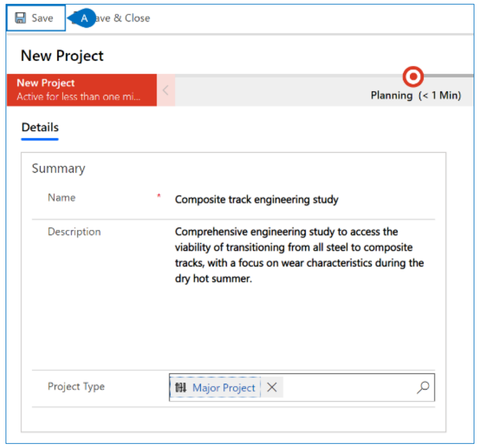


g. If the external project is **Planner**, **Create a new group** or **select an Existing Microsoft 365 group** for the project. If you use an **existing M365 group** you can link to an **existing Planner plan or create a new one**.
h. **Add team members** to the M365 group.
i. Enter a **name for the Planner Plan** (defaults to the IQ Project Name).
j. Define whether the **same M365 group** should own both the **IQ Project and Planner plan**.



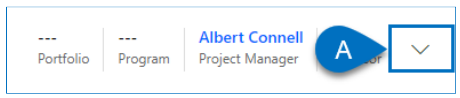
2. CREATE THE NEW PROJECT

a. Select Save to create the project and apply the selected project type.

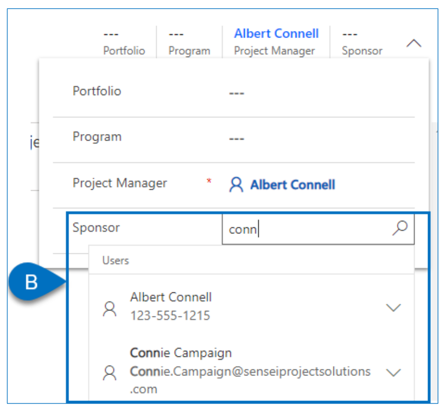


3. DEFINE THE PROJECT SPONSOR

a. Identify the individual who is the project sponsor as this field is used for filtering views and reports. Select the **Down arrow** in the **header** area.

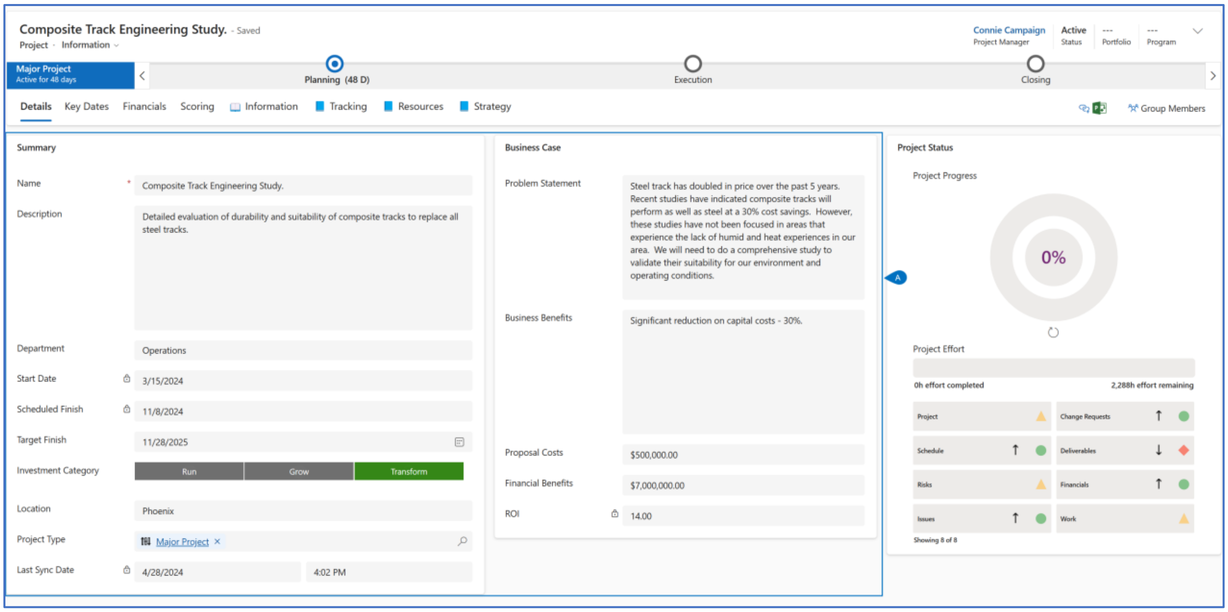


b. Type the name in the **Sponsor** field (following your organization's naming policies) to find and click on their name to select the appropriate individual.



4. CAPTURE PROJECT DETAILS

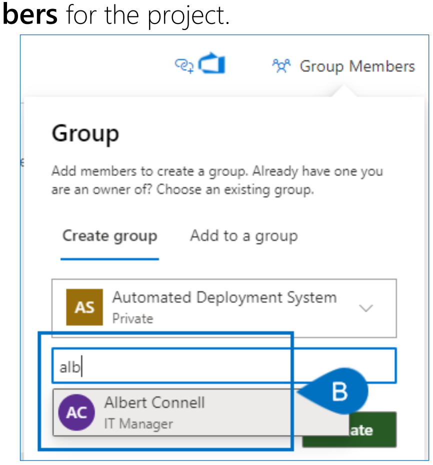
a. Complete the **Summary** and **Business Case** panes (or the appropriate forms defined by your organization's Project Type).



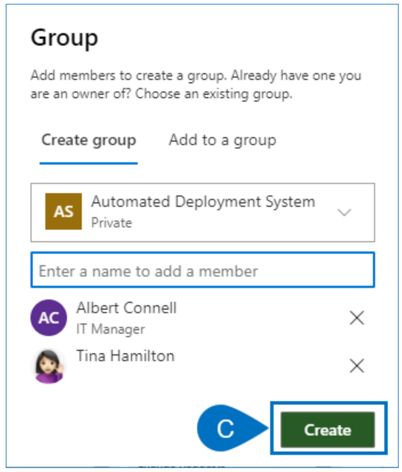
5. DEFINE THE PROJECT TEAM

a. Identify the **team members** by creating a Microsoft 365 group specific to the project, or associate the project to an existing group based on organizational policies by clicking on **Group Members**. If you **have synced the project with a Planner Plan**, the group **has already been defined**, but you should still **ensure all team members are included in the group.**

b. Search for and **select the team members** for the project.



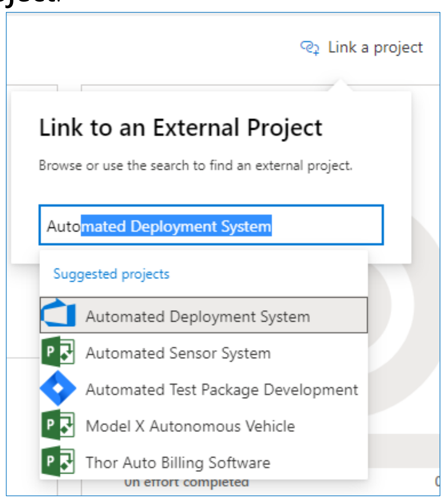
c. Click **Create** to create the new group.



6. LINK THE PROJECT WITH AN EXTERNAL EXECUTION TOOL (IF APPROPRIATE AND NOT ALREADY DONE AS PART OF NEW PROJECT)

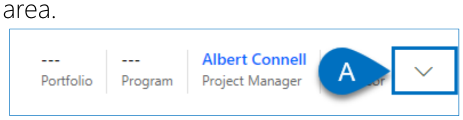
a. Click **Link a project**.

b. Search for and **select the external project**.

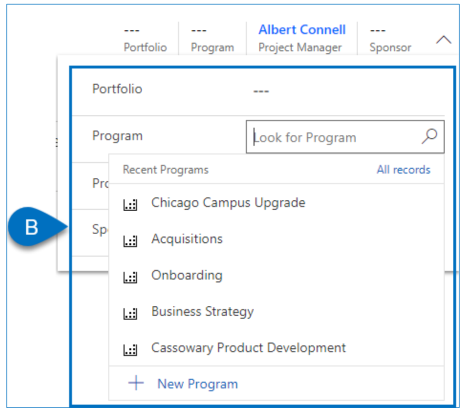


7. ASSOCIATE THE PROJECT WITH A PORTFOLIO OR PROGRAM (IF APPROPRIATE)

a. Select the **Down arrow** in the **header** area.



b. Select the **Portfolio** or **Program** from the drop-down lists. If required, you can create a new one at this time.



Capture Key Dates

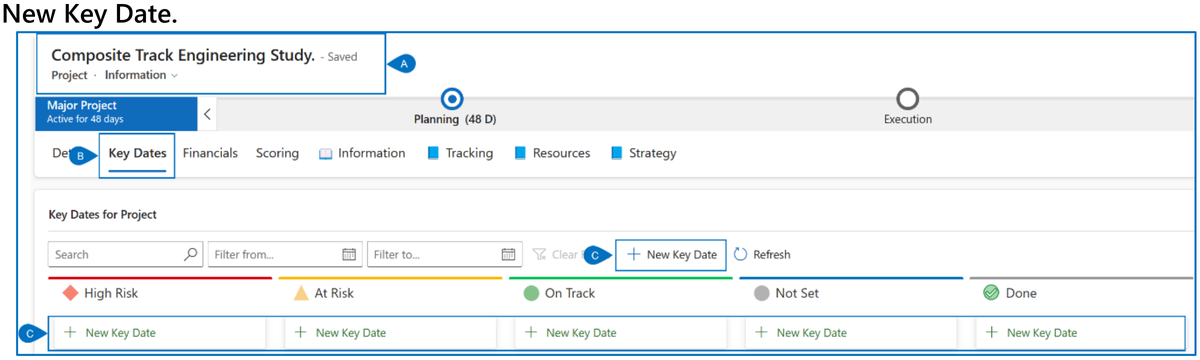
Project Manager **Projects – Current Project – Key Dates**

1. CAPTURE KEY DATES

a. Ensure you have the appropriate project open in the **Projects area.**

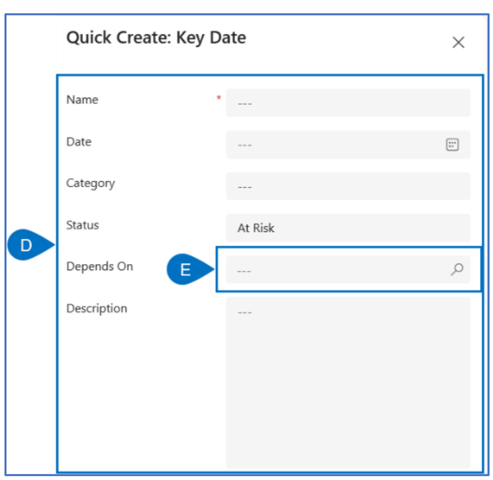
b. Click the **Key Dates** tab.

c. Click **+New Key Date.**



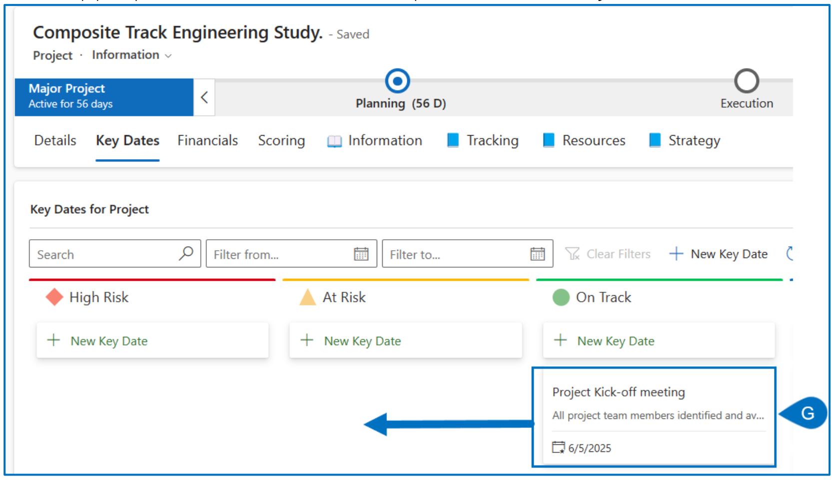
d. Complete the **Quick Create Key Date** form with the **Name**, Stakeholder **expected Date**, **Category**, **Status** and **Description**.

e. If appropriate, search for the **Key Date** that this **Key Date depends on**.



f. and then click **Save and Close** from the bottom.

g. Set the status by dragging and dropping the **Key Dates** card to the appropriate **Status** column. If you used the **+New Key Date** under the appropriate KPI column this step is not necessary.



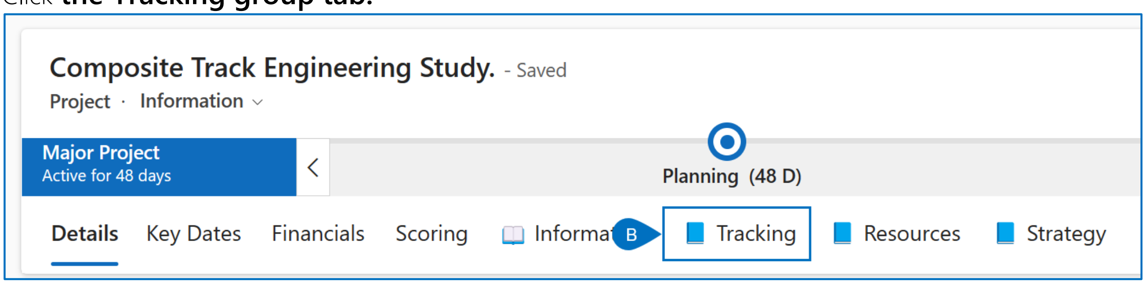
Identify Deliverables

Project Manager | **Projects – Current Project – Deliverables**

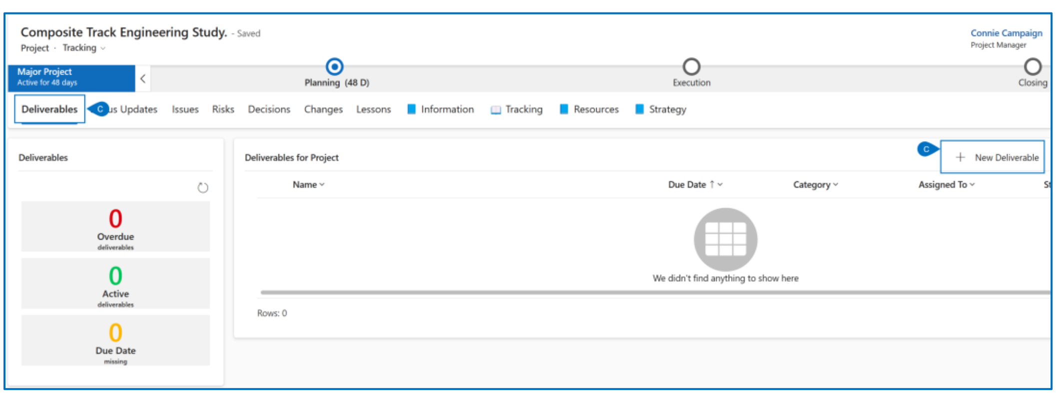
1. IDENTIFY DELIVERABLES

a. Ensure you have the appropriate project open in the **Projects area.**

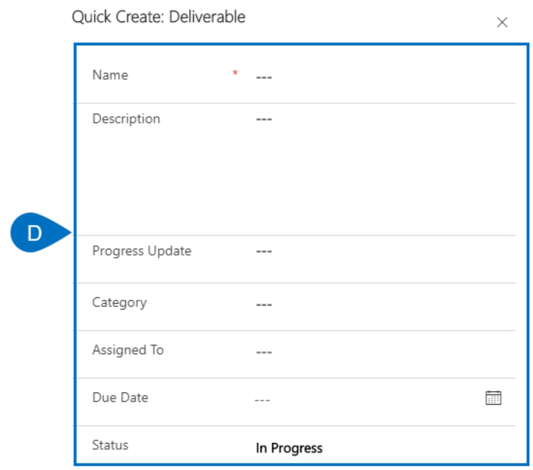
b. Click **the Tracking group tab.**



c. Ensure you are on the **Deliverables** tab and then Click **+New Deliverable.**



d. Complete the **Quick Create Deliverable** form and then click **Save and Close** from the bottom.

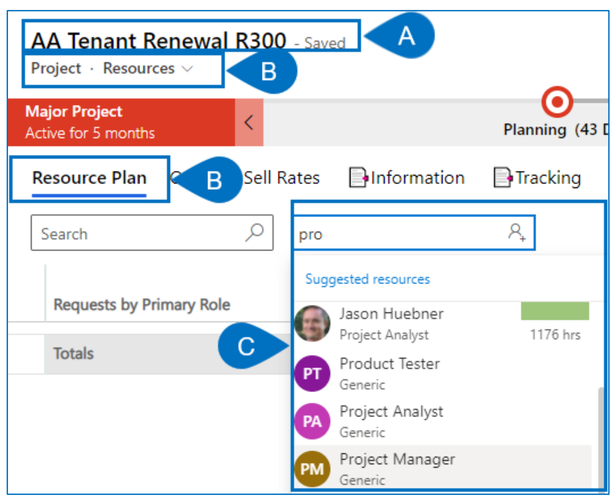


Create Resource Requests

Project Manager **Projects – Current Project – Resource Plan**

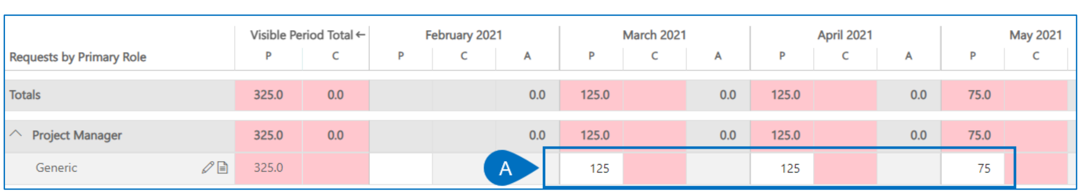
1. CREATE GENERIC RESOURCE REQUESTS

a. Ensure you have the appropriate project open in the **Projects area.**
b. Ensure you are on the **Resources grouping** tab and select **Resource Plan**.
c. Use the **Select a Resource** search box and **find the generic resource** you want to request for the new project.



2. DEFINE GENERIC RESOURCE REQUIREMENTS

a. Enter the **number of hours requested** per displayed time period for each generic resource.



3. SUBMIT RESOURCE REQUESTS FOR REVIEW AND APPROVAL

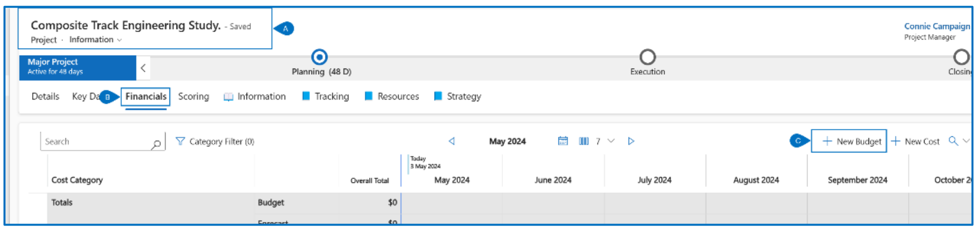
a. Once all requests have been defined, click Submit and Save to submit the resource requests.

Record the project budget

Project Manager **Projects – Current Project - Financials**

1. CREATE THE PROJECT BUDGET

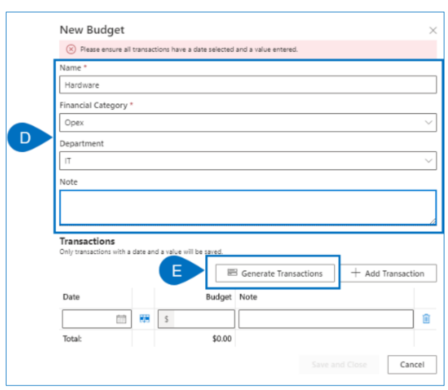
a. Ensure you have the appropriate project open in the **Projects area.**
b. Click the **Financials** tab.
c. Click **+New Budget.**



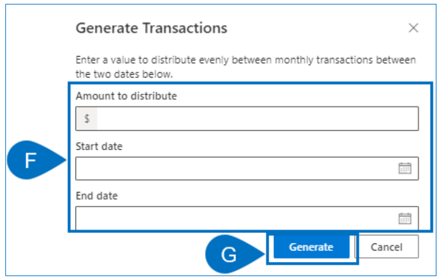
d. Complete the **New Budget** form. The **Name** and **Financial Category** fields are mandatory.

There are two methods to enter budgets depending on the data you need to enter. Generate Transactions will allow you to spread a budget amount evenly over a set period of months which can be contoured afterward. Or you can add budget line items individually by entering the data in the transaction lines directly and using +Add Transaction to add additional lines.

e. Click the **Generate Transactions** button if you have a set dollar amount that needs to be spread evenly over a number of months.



f. Enter the **approved budget amount** and the budget **start** and **end dates**.
g. Click **Generate** to have the budget amount spread across the desired dates.



h. **Edit** any individual monthly budget amount to **contour the budget.**

i. Or, Click **+ Add Transaction** to add additional months to the budget. This can also be done without using the Generate option if you have a one time amount to be entered or need to enter varied amounts.

j. Enter the **date** and **amount**.