

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.

1. Manage project issues
2. Manage project risks
3. Track project decisions
4. Record and manage change requests
5. Capture lessons learned
6. 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



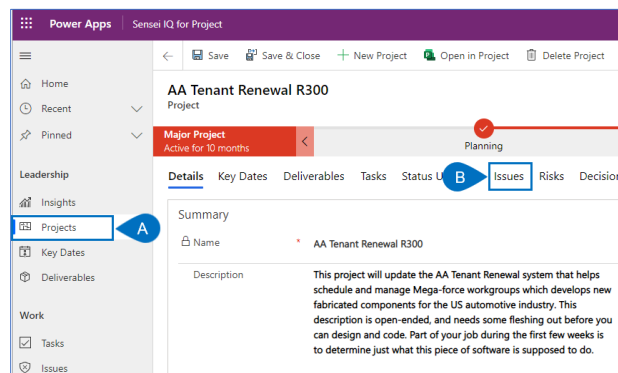
Project Manager



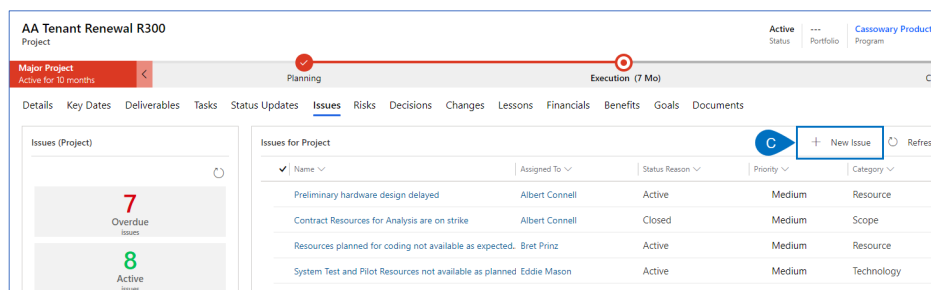
Project IQ – Issues tab

1. CREATE NEW ISSUE

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



- c. Click **+ New Issue**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Issue

Name * ---

Assigned To ---

Status Active

Category ---

Priority Medium

Due Date ---

Description ---

Resolution ---

Save and Close Cancel

2. UPDATE ISSUES

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

Power Apps | Sensei IQ for Project

AA Tenant Renewal R300 Project

Major Project Active for 10 months

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

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.

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

AA Tenant Renewal R300 Project

Active Status Portfolio Cassowary Product Development Bret Prinz Project Manager

Major Project Active for 10 months

Planning Execution (7 Mo) Closing

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

Issues (Project)

Issues for Project

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	Bret Prinz	Active		Medium	Resource	18-Jun-20
System Test and Pilot Resources not available as planned Eddie Mason	Eddie Mason	Active		Medium	Technology	19-Jun-20
Coding tasks underestimated Bob Banker	Bob Banker	Closed		Medium	Schedule	19-Jun-20
Deployment Logistics tasks underestimated Albert Connell	Albert Connell	Active		High	Business Process	25-Jun-20
Hardware Vendor not compliant with new Industry Stand. Bret Prinz	Bret Prinz	Active		Medium	Vendor	26-Jun-20

- d. Update any field, as required.
- e. 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.

- c. Click **+New Risk**.

Name	Due Date	Category	Assigned To
Developer creativity to perform necessary development activities	---	Technology	Bret Prinz
Additional hardware expense may be encountered	15-Apr-20	Technology	Bret Prinz
Unexpected growth in project requirements	24-Apr-20	Management Escalation	Bret Prinz
Resources may not be available to commit to the project	17-Jun-20	Resource	Bob Banker
Vendor may not be financially viable in the future	18-Jun-20	Vendor	Bret Prinz
Executive Staff may become disengaged with the project	25-Jun-20	Management Escalation	Jerry Colangelo

- d. 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.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

Quick Create: Risk

D Name *

Assigned To

Status Active

Category

Due Date

Likelihood *

E Consequence *

Cost

Description

Mitigation Plan

Contingency Plan

Trigger Description

Trigger Date

F Save and Close Cancel

2. UPDATE RISKS

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

Power Apps | Sensei IQ for Project

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AA Tenant Renewal R300 Project

Major Project Active for 10 months

Planning

Details Key Dates Deliverables Tasks Status Updates Risks Decisions

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

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Risks (Project)

Risk Matrix

Name	Due Date	Category	Assigned To	Status Reason
Developer creativity to perform necessary development activi		Technology	Bret Prinz	Closed
Additional hardware expense may be encountered	15-Apr-20	Technology	Bret Prinz	Closed
Uninspected growth in project requirements	24-Apr-20	Management Escalation	Bret Prinz	Closed
Resources may not be available to commit to the project	17-Jun-20	Resource	Bob Banker	Active
Vendor may not be financially viable in the future	18-Jun-20	Vendor	Bret Prinz	Active
Executive Staff may become disengaged with the project	25-Jun-20	Management Escalation	Jerry Colangelo	Active
Project Team may encounter resignations or transfers	24-Jul-20	Resource	Bret Prinz	Active

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

Developer creativity to perform necessary development activity
Risk

Details

Name	Developer creativity to perform necessary development activity	Description	---
Assigned To	Bret Prinz	Mitigation Plan	---
Status	Closed	Contingency Plan	---
Category	Technology	Trigger Description	---
Due Date	---	Trigger	Date
Likelihood	Rare		
Consequence	Minor		
Cost	\$5,000.00		

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.

Power Apps | Sensei IQ for Project

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- c. Click **+New Decision**.

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Decisions (Project)

6 Overdue decisions

Decisions for Project

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

+ New Decision Refresh

- d. 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.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

Quick Create: Decision

D Name * ---

Description ---

Status **Active**

Priority **Medium**

Due Date ---

E Category ---

Escalation Required **No**

Escalation Manager ---

Decision Date ---

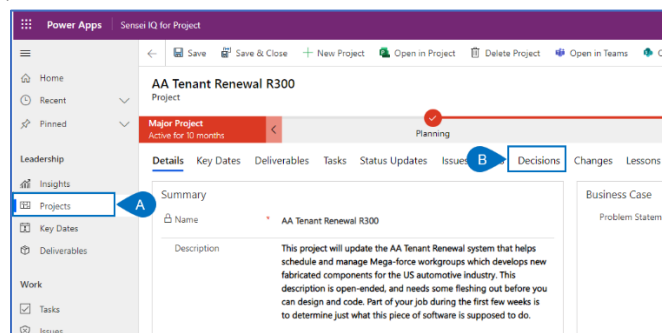
Approver ---

Assigned To ---

F Save and Close Cancel

2. UPDATE DECISIONS

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



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

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

Decisions (Project)

6 Overdue decisions

Decisions for Project

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

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

Hold quarterly project review meetings with management
Decision

Details

Name	Hold quarterly project review meetings with management	Escalation Required	No
Description	---	Escalation Manager	---
Status	Accepted	Decision Date	10-Apr-20
Priority	High Medium Low	Approver	---
Due Date	10-Apr-20	Assigned To	Bret Prinz
Category	Business Process		

Record and manage change requests

Project Manager

Project IQ – Changes tab

1. CREATE NEW CHANGE REQUEST

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

Summary

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- Click **+New Change Request**.

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Change Requests (Project)

Change Requests for Project

Name	Due Date	Category	Assigned To	Priority	Status Reason	Cost
Add new feature to extract data records based on re	15-Jan-20	Resource	Eddie Mason	Medium	New	

+ New Change Request

- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Change Request

D Name *

Description

Driven By

Implementation Date

Category

Priority **Medium**

Assigned To

Work Effort Estimate

E Work Effort Details

Cost Estimate

Cost Estimate Details

Duration Estimate

Duration Estimate Details

Resource Impacts

Impact on Other Projects

Assumptions

Approved / Rejected By

F Save and Close Cancel

2. UPDATE CHANGE REQUESTS

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

Power Apps | Sensei IQ for Project

AA Tenant Renewal R300 Project

Major Project Active for 10 months

Planning

A Projects

B Changes

Summary

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Business Case Problem Statement

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

AA Tenant Renewal R300 Project

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Cassowary Product Development Bret Prinz Project Manager

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

Change Requests (Project)

Change Requests for Project

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

C

- Update any field, as required.

e. Click **Save & Close**.

Capture lessons learned

Project Manager

Project IQ – Lessons tab

1. CREATE NEW LESSON LEARNED

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

c. Click **+New Lesson Learned**.

- 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.
- Provide additional details in the remaining fields.

- f. Click **Save and Close**.

Quick Create: Lesson Learned

Name * ---

Category ---

Status **Active**

Observation ---

Recommendation ---

Lesson Learned ---

Action Taken ---

Save and Close Cancel

2. UPDATE LESSONS LEARNED

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

Power Apps Sensei IQ for Project

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Business Case Problem Statement

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

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Lessons Learned for Project + New Lesson Learned

Name	Created By	Category
Long meetings can be counter productive	OSUS 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

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

Long meetings can be counter productive

Lesson Learned

Details

Name	Long meetings can be counter productive	Observation	---
Category	Business Process	Recommendation	---
		Lesson Learned	---
		Action Taken	---

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.

Power Apps Sensei IQ for Project

AA Tenant Renewal R300

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Business Case

Problem Statement Megaforce tenants need to be integrated into our corporate environment for use by all product demonstrators.

Business Benefits Common operations for all groups and departments

- Click **+Upload**.

AA Tenant Renewal R300

Project

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Project Documents

Search Upload Open in SharePoint Refresh Show as List

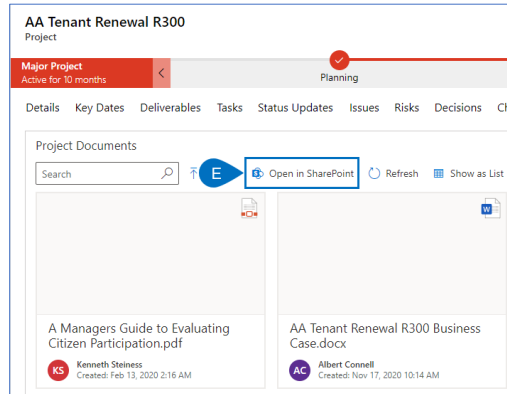
A Managers Guide to Evaluating Citizen Participation.pdf

Kenneth Steiness Created: Feb 13, 2020 2:16 AM

AA Tenant Renewal R300 Business Case.docx

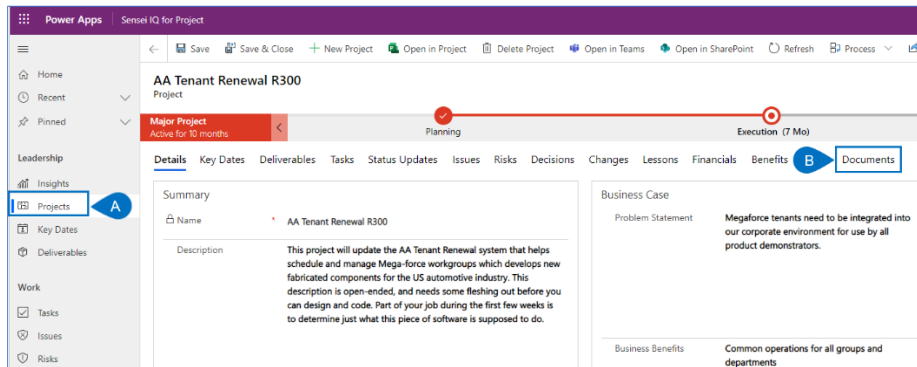
Albert Connell Created: Nov 17, 2020 10:14 AM

- 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.

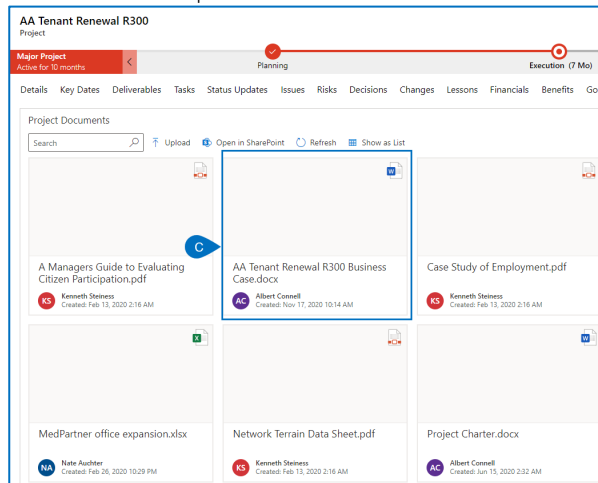


2. VIEW OR UPDATE EXISTING DOCUMENTS

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



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



- 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.

