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

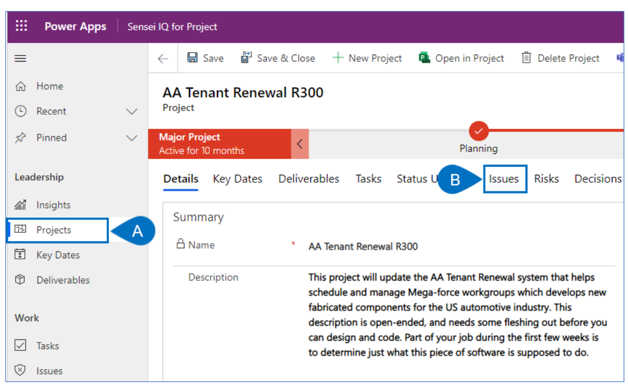
With the exception of managing project documents, the other 5 function in a similar fashion and if you are comfortable with one, you may not need to review the other components of this document.

Manage project issues

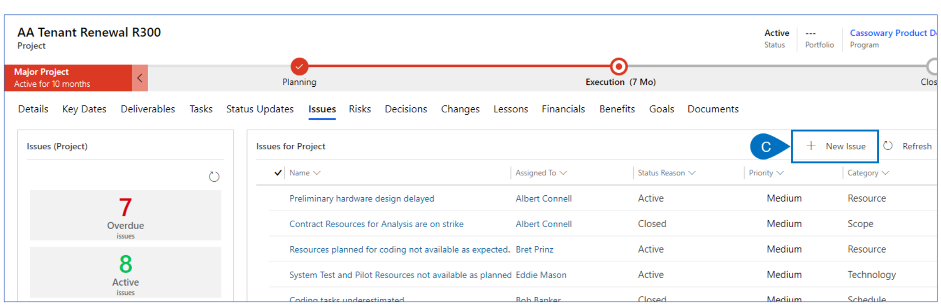
Project Manager **Project IQ – Issues tab**

1. CREATE NEW ISSUE

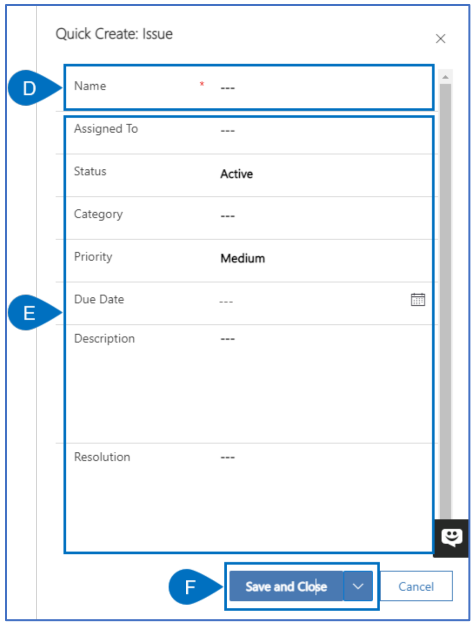
a. Ensure you have the appropriate project open in **Project IQ.**
b. Click the **Issues** tab.



c. Click **+New Issue.**

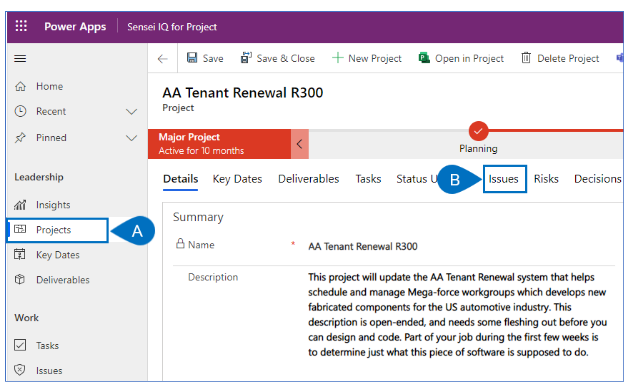


d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the issue in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.

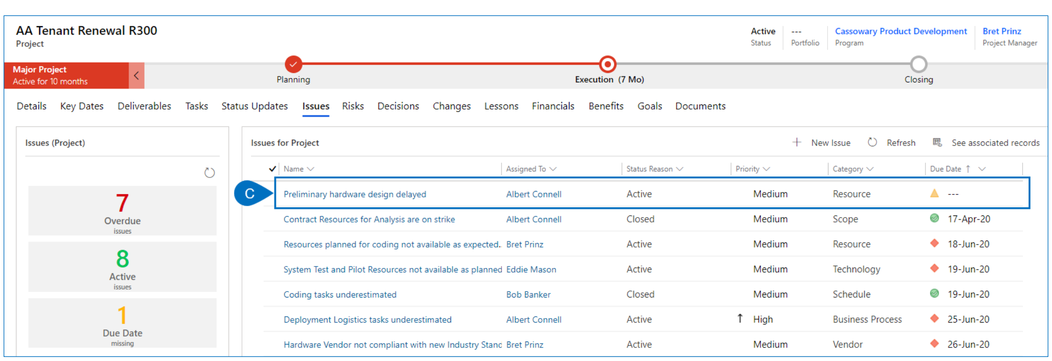


2. UPDATE ISSUES

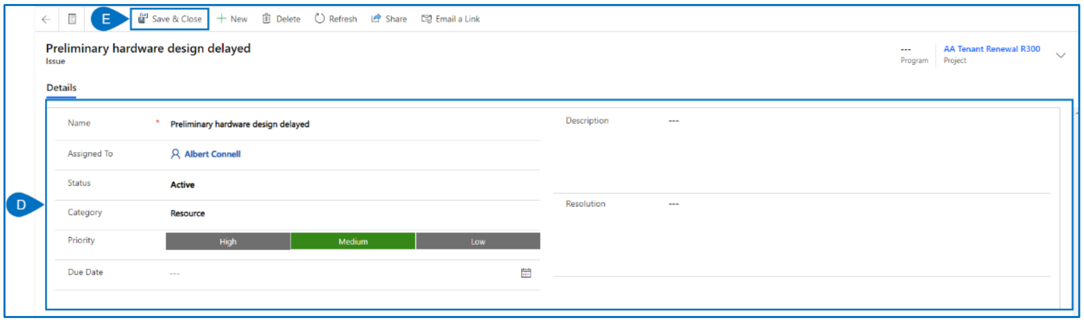
a. Ensure you have the appropriate project open in **Project IQ.**
b. Click the **Issues** tab.



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



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



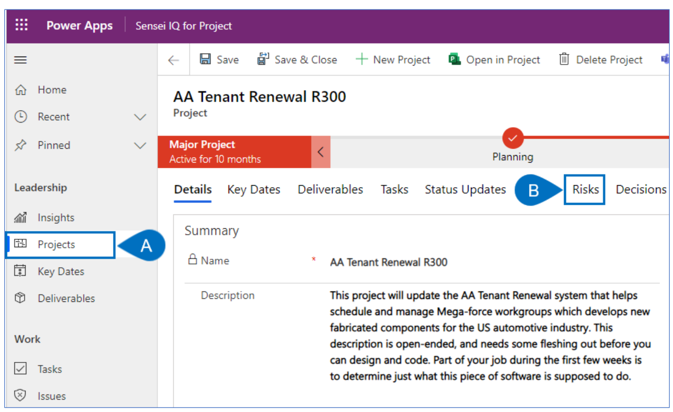
Manage project risks

Project Manager Project IQ – Risks tab

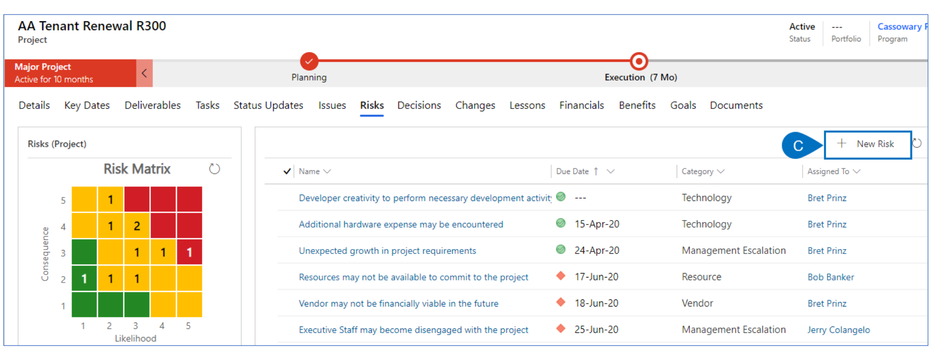
1. CREATE NEW RISK

a. Ensure you have the appropriate project open in **Project IQ.**

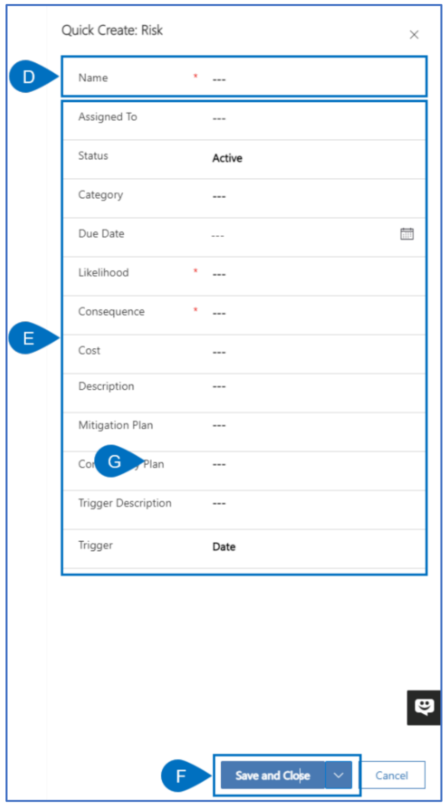
b. Click the **Risks** tab.



c. Click **+New Risk.**



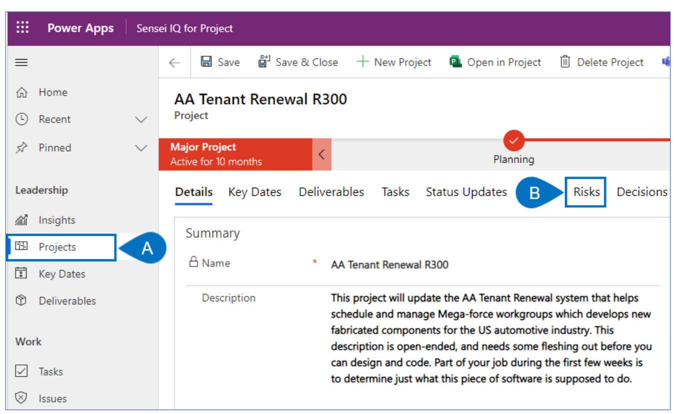
d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the risk in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.



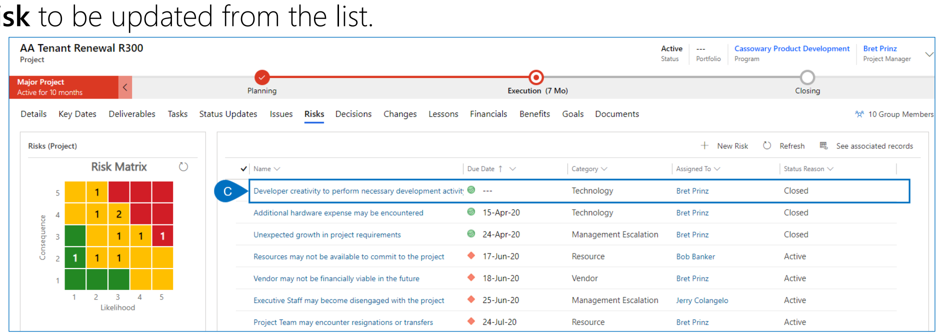
2. UPDATE RISKS

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Risks** tab.

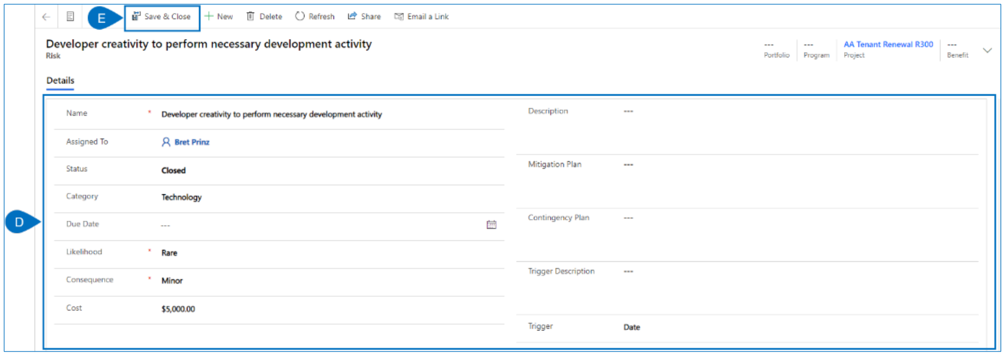


c. Click on the **Risk** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**



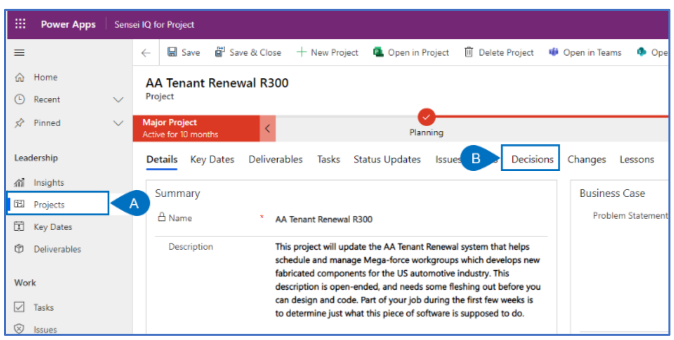
Track project decisions

Project Manager | Project IQ – Decisions tab

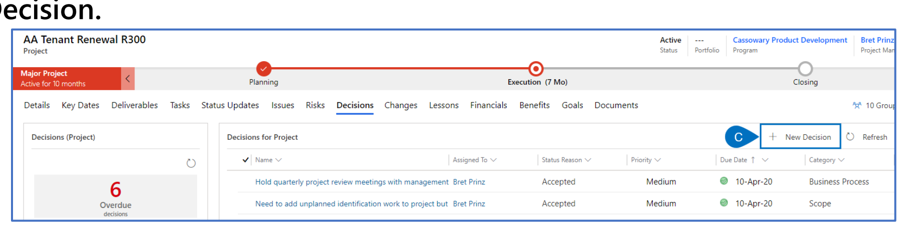
1. CREATE NEW DECISION

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Decisions** tab.



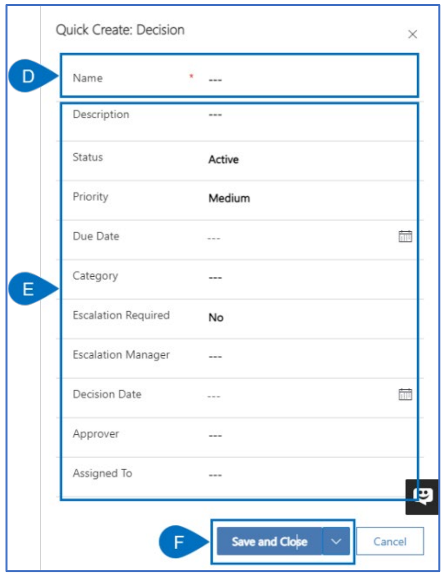
c. Click **+New Decision.**



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.

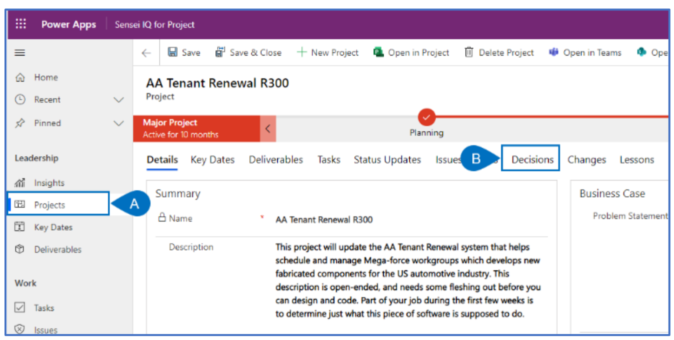
f. Click **Save and Close**.



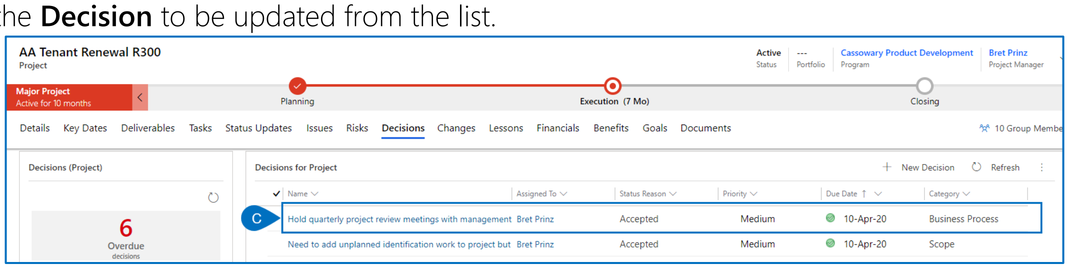
2. UPDATE DECISIONS

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Decisions** tab.

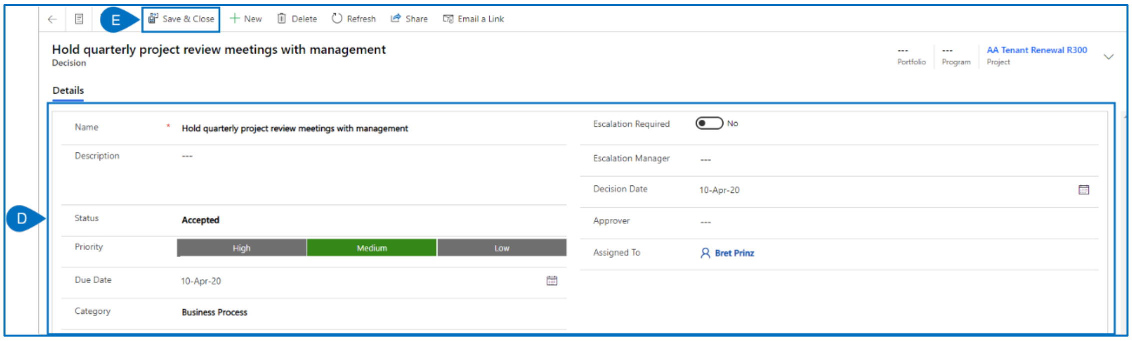


c. Click on the **Decision** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



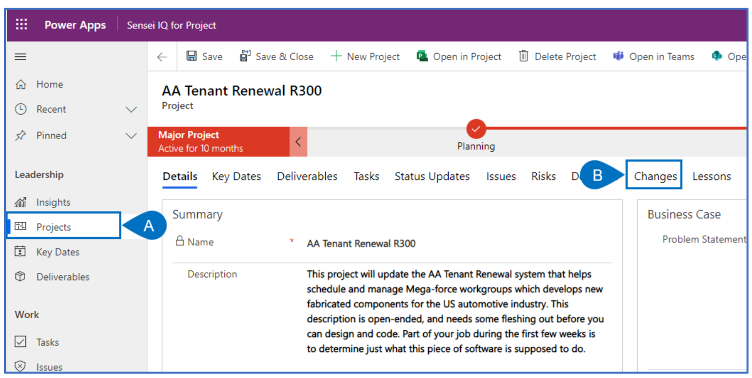
Record and manage change requests

Project Manager — Project IQ – Changes tab

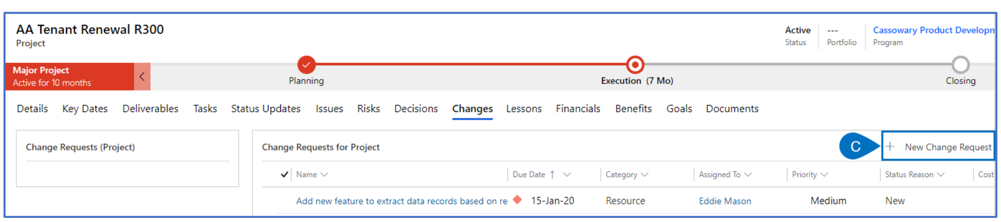
1. CREATE NEW CHANGE REQUEST

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Changes** tab.



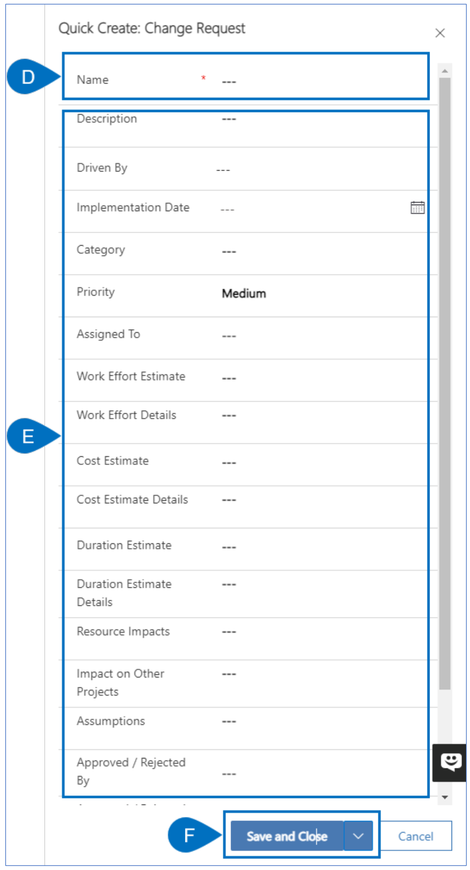
c. Click **+New Change Request.**



d. 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.

e. Provide additional details in the remaining fields.

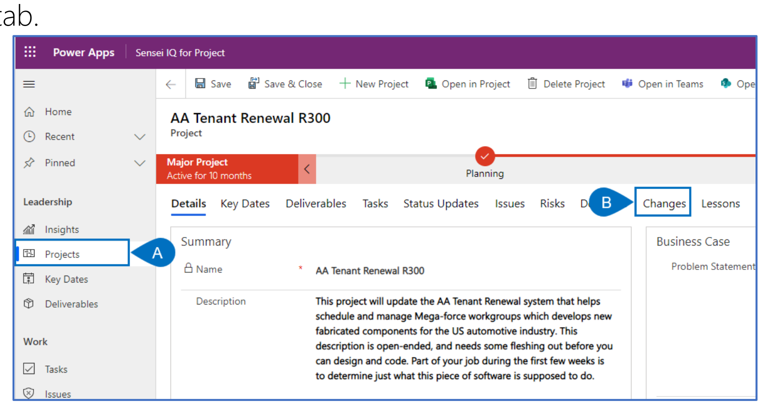
f. Click **Save and Close**.



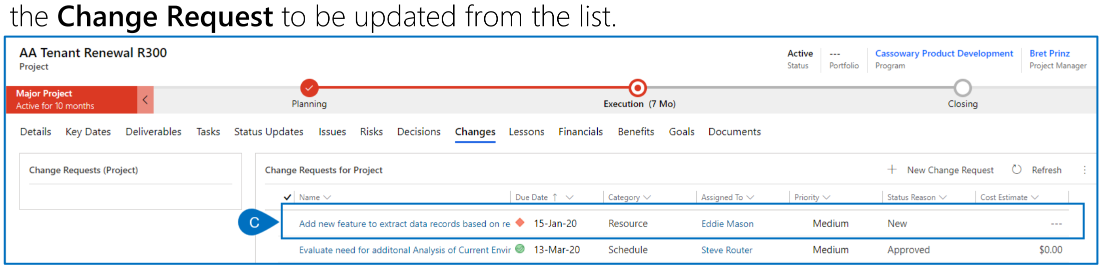
2. UPDATE CHANGE REQUESTS

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Changes** tab.

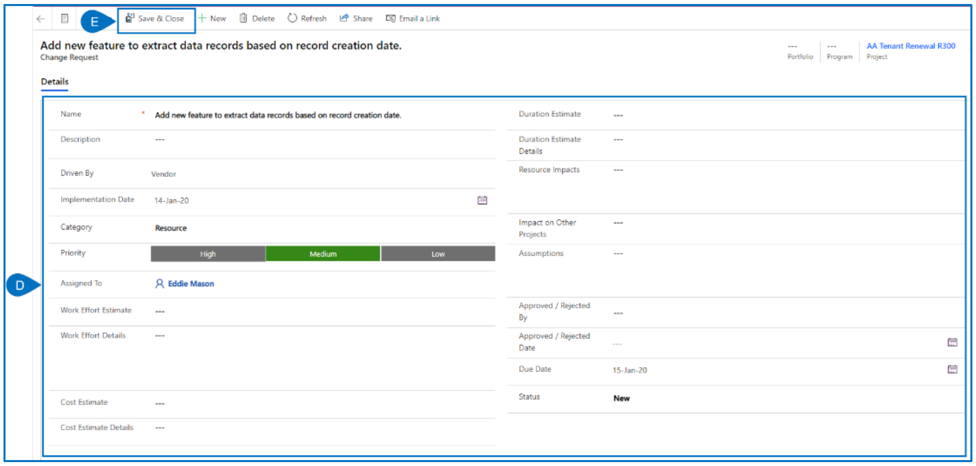


c. Click on the **Change Request** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



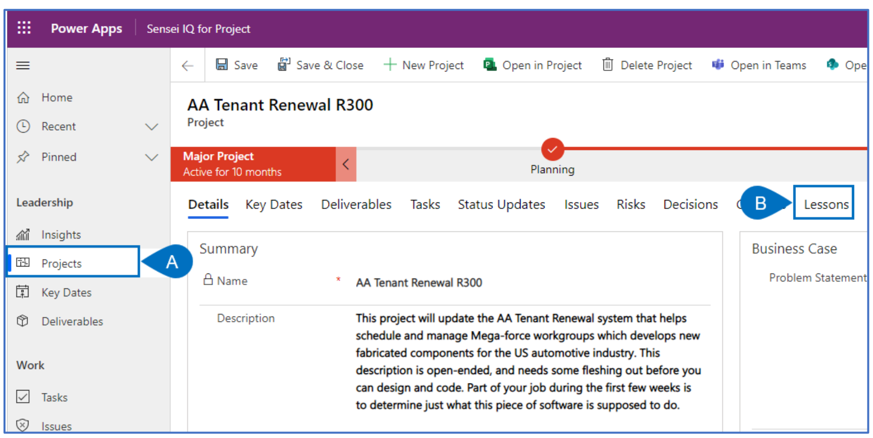
Capture lessons learned

Project Manager | Project IQ – Lessons tab

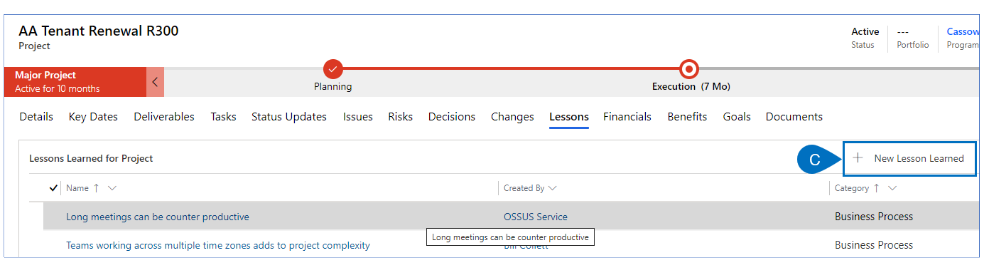
1. CREATE NEW LESSON LEARNED

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Lessons** tab.



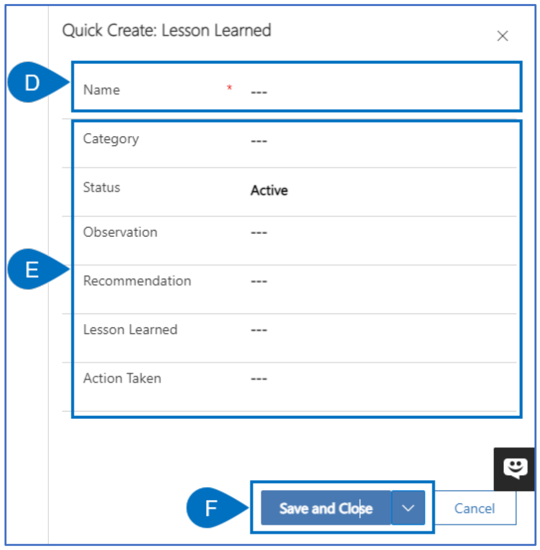
c. Click **+New Lesson Learned.**



d. 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.

e. Provide additional details in the remaining fields.

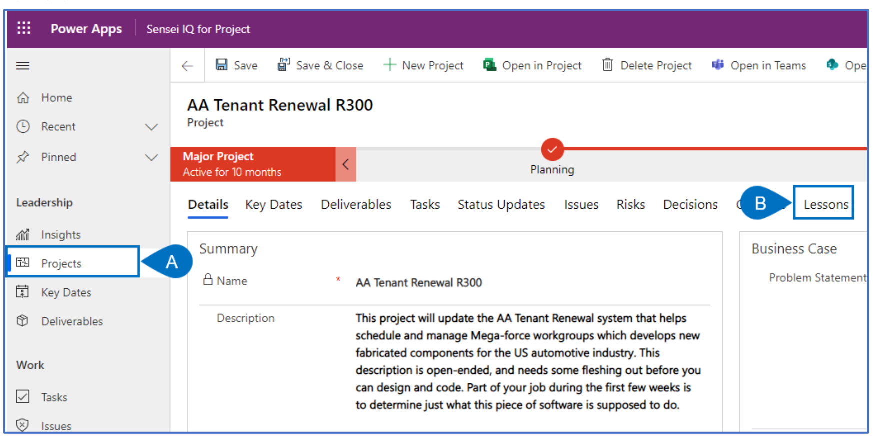
f. Click **Save and Close**.



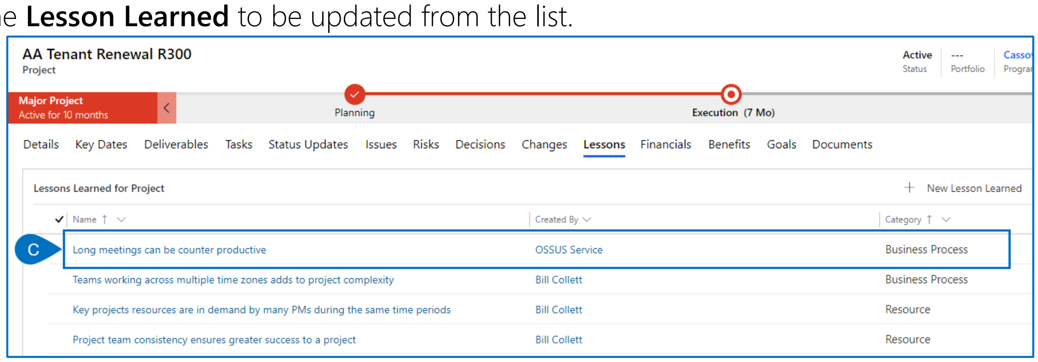
2. UPDATE LESSONS LEARNED

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Lessons** tab.

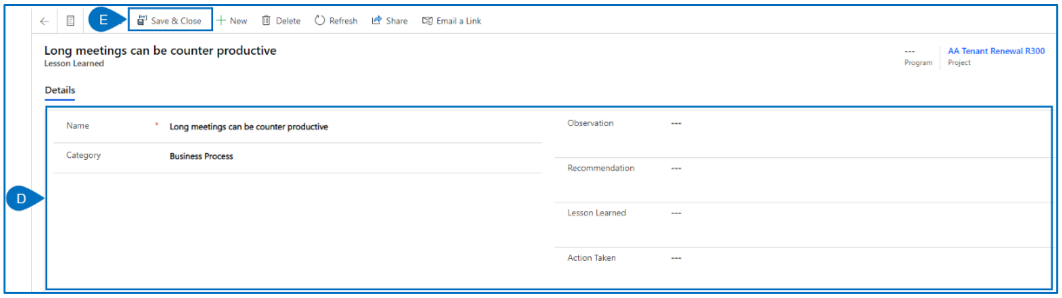


c. Click on the **Lesson Learned** to be updated from the list.



d. Update any field, as required.

e. Click Save & Close.



Manage project documents

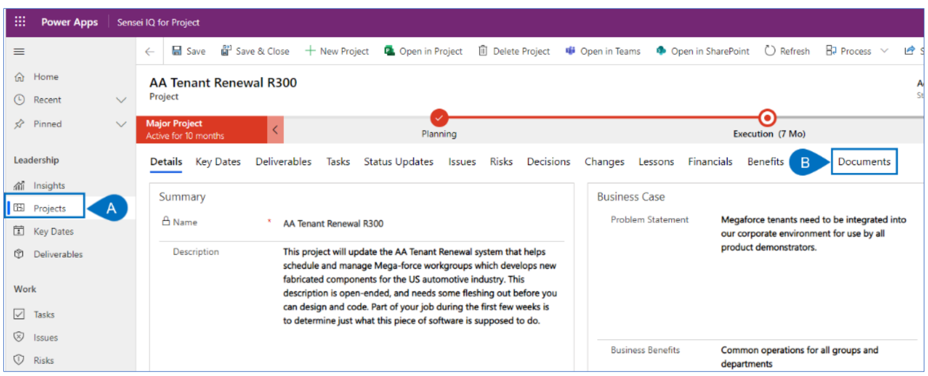
Project Manager

Project IQ – Documents tab

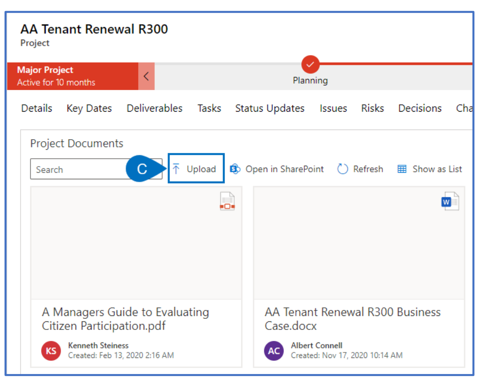
1. UPLOAD NEW DOCUMENTS

a. Ensure you have the appropriate project open in **Project IQ.**

b. Click the **Documents** tab.

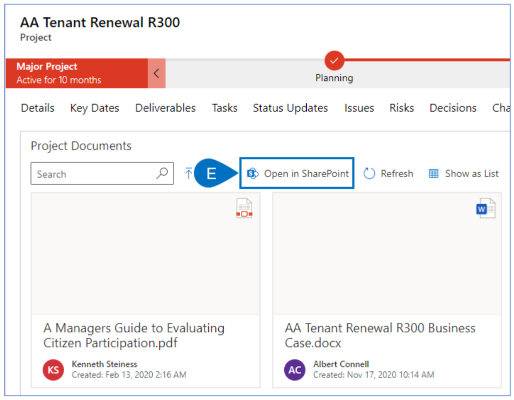


c. Click **+Upload.**



d. **Browse and select** the new document to be added to the project repository.

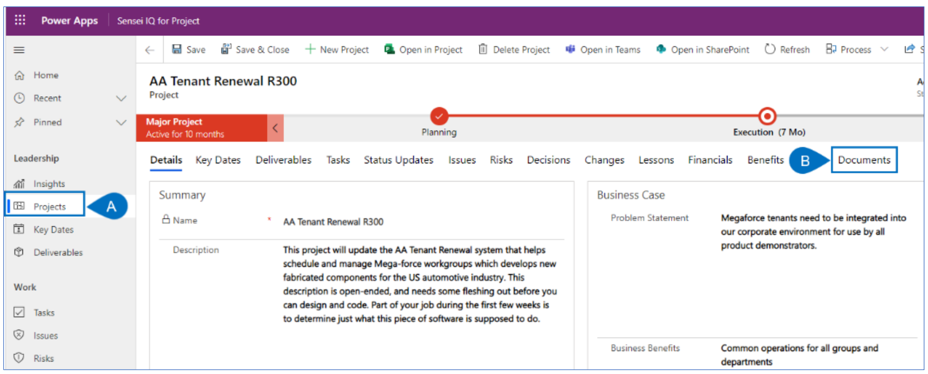
e. Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.



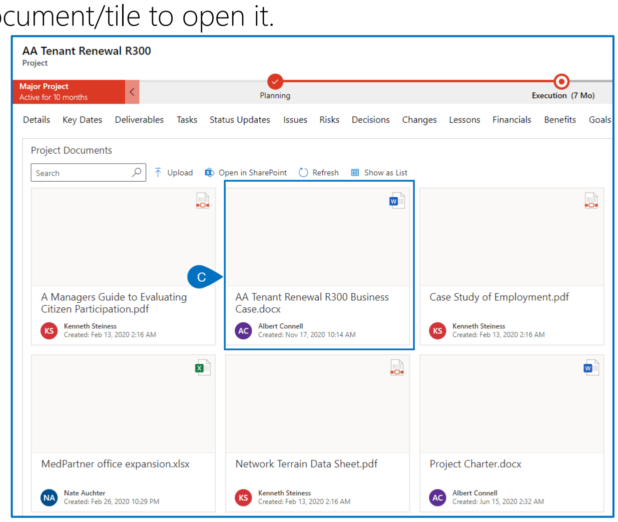
2. VIEW OR UPDATE EXISTING DOCUMENTS

a. Ensure you have the appropriate project open in **Project IQ.**

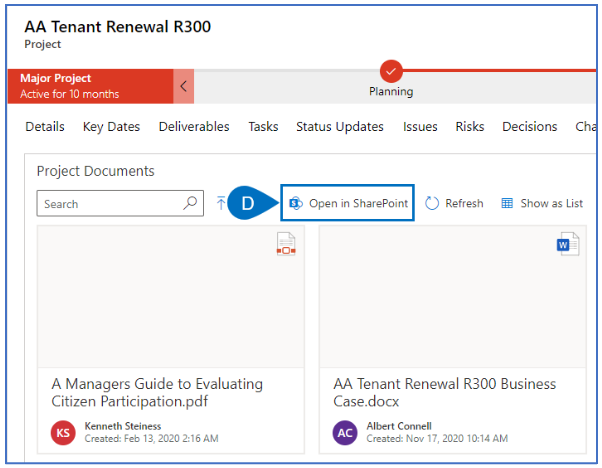
b. Click the **Documents** tab.



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



d. 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.


AA Tenant Renewal R300
Project
Major Project
Active for 10 months
Planning
Details
Key Dates
Deliverables
Tasks
Status Updates
Issues
Risks
Decisions
Project Documents
Search
D
Open in SharePoint
Refresh
Show as List
A Managers Guide to Evaluating Citizen Participation.pdf
KS
Kenneth Steiness
Created: Feb 13, 2020 2:16 AM
AA Tenant Renewal R300 Business Case.docx
AC
Albert Connell
Created: Nov 17, 2020 10:14 AM

