

Overview

This Job Aid defines the steps for team members to follow for collaborating on projects in Sensei IQ. This includes both tasks and artifacts, such as issues, risks, decisions, changes, lessons learned, and documents.

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

There are eight (8) collaboration entity job aids available to help you deliver your project.

- 1. Project collaboration in Teams
- 2. Updating project tasks
- 3. Manage project issues
- 4. Manage project risks
- 5. Track project decisions
- 6. Record and manage change requests
- 7. Maintain project documents
- 8. Capture lessons learned

Project collaboration in Teams

🖺 🛛 Team Member



Microsoft Teams

1. ACCESS A PROJECT IQ TEAM/CHANNEL

a. Find and open the **project team and channel** in Microsoft Teams.



b. Use standard Teams functionality, such as **Posts, Files, Wiki,** etc., to **collaborate** with other team members.





c. Leverage Project IQ tabs to connect with other project artifacts maintained in Project IQ.



Updating project tasks

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⁹ Work IQ – Insights

1. IDENTIFY AND UPDATE CURRENT WORK ASSIGNMENTS

a. Ensure you are in Work IQ, select **Insights**, and ensure you are on the **My Work** page.



- b. Review the tasks in the **1-Current** area on the report, with a focus on the **Red and Yellow tasks** as these are already late, or currently due.
- c. Click on the **link button** to open the task detail in the appropriate scheduling tool.

'lanning Window > Project > Assignment	KPI	Link
- 1-Current		
2021 Customer Support		
General Test Team Support		IQ
□ eCommerce Upgrade v2		
Define Application Requirements	•	IQ
Determine Project Scope	•	IQ
Draft preliminary software design	•	IQ
eCommerce Upgrade vAN		
Determine Project Scope	▶ ♦	ÎQ
Electronic Asset Tracking System		•
Backlog grooming		
Employee Satisfaction Survey		
Review feedback comments and update survey		
Expand all revenue fields		
QA	\circ	
UAT	\cap	



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Collaborating on projects

Work IQ – Insights

d. As appropriate, update the details to maintain the task's current status. Specifically, you should track your current progress by updating either the **% complete or the effort completed and effort fields**. You should also review and update as needed the **Finish date** to accurately reflect when you believe you can complete this task.

esign studies ^{aject Task}				
neral Resources	Dependencies Ch	nild Tasks Related		
Name	* Design studies			
Category				
Notes				
Start	1/18/2021			
Finish	* 3/1/2021			
Due Date				
Effort (Hours)	500.00			
Effort Completed (Hours)	275.00			
Percent Complete	55			

Manage project Issues

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1.

IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

a. Ensure you are in Work IQ, select **Insights**, and ensure you are on the **Issues** page.

III Power Apps	Sensei IQ	for Project	
=			
G Home	A	⊗ issues	
Recent	~ -		Issues by Priority
✓ Pinned	\sim		100000 09 1 1 101109
Sensei IQ			
ia) Home			
Work			
🔬 Insights	A	Mediu	т — 14 — High
Deliverables			
✓ Tasks			
⊗ Issues			
Risks			

- b. Review the issues on the report, with a focus on the **Red ones** as these are already late, or currently due.
- c. Click on the **link button** to open the issue details.

KPI ▼	lesue	Link
•	Coding tasks underestimated	P
	Deployment Logistics tasks underestimated	Q
	E Backorder	Q
•	Existing system documentation insufficient	P
•	Language Barrier	®
	Power outage at Data Center	P

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



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Collaborating on projects

	Preliminary hardwa	re design delayed			Program	AA Tenant Renewal R300 Project	~
	Name	* Preliminary hardware design delayed	Description				
	Assigned To	A Albert Connell					
	Status	Active					.
D	Category	Resource	Resolution	***			
	Priority	High Medium Low					
	Due Date	🖽					-

Manage project Risks

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³ Work IQ - Insights

1. IDENTIFY AND UPDATE CURRENT RISKS ASSIGNED TO YOU

a. Ensure you are in Work IQ, select **Insights**, and ensure you are on the **Risks** page.

III Power Apps Sensei IQ fo	Project
≡ ⊛ Home	⑦ Risks
③ Recent ∨ ☆ Pinned ∨	Risk Matrix
Sensei IQ 19) Home	Business Process Management Escalation Other Resource Schedule Technology
Work	e e e e e e e e e e e e e e e e e e e
Deliverables Tasks	2 2 0 0
S Issues	0 1 2 3 4 5
Se Decisions	Likelihood

- b. Review the risks on the report, with a focus on the **Red ones** as these are already late, or currently due.
- c. Click on the **link button** to open the risk details.



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



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Collaborating on projects

Developer creat	ivity t	o perform necessary development activity				Portfelio	Program	AA Tenant Renewal R300 Project	Benefit
Name		Developer creativity to perform necessary development activity		Description					
Assigned To		A Bret Prinz							
Status		Closed		Mitigation Plan					
Category		Technology							
Due Date			<u>80</u>	Contingency Plan					
Likelihood		Rare							
Consequence		Minor		Trigger Description					
Cost		\$5,000.00							
				Trigger	Date				

Track project Decisions

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1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

a. Ensure you are in Work IQ, select Insights, and ensure you are on the Decisions page.



- b. Review the decisions on the report, with a focus on the **Red ones** as these are already late, or currently due.
- c. Click on the **link button** to open the decision details.



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

		🔐 Save & Close 🕂 New 🔋 Delete 🕐 Refresh 🖻 Share Di Email a Link			
	Hold quarterly p	roject review meetings with management			Portfolio Program Project V
	Details				
	Name	* Hold quarterly project review meetings with management	Escalation Required	No No	
	Description		Escalation Manager		
			Decision Date	10-Apr-20	
D	Status	Accepted	Approver		
	Priority	High Medium Low	Assigned To	A Bret Prinz	
	Due Date	10-Apr-20			
	Category	Business Process			

Record and manage Change Requests

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1. IDENTIFY AND UPDATE CURRENT CHANGE REQUESTS ASSIGNED TO YOU

a. Ensure you are in Work IQ, select Insights, and ensure you are on the Change Requests page.

III Power Apps	Sensei IQ 1	for Project				
=		a c		acta		
合 Home	A	PC	nange kequ	iests		
C Recent	\sim					
🖈 Pinned	\sim		Change Requests by	Duration and V	/ork Effort Chang	je
			● Other ● Resource ●	Schedule	chnology Vendor 	
Sensei IQ		() ()				
9 Home		four				
	_	± 40K				
Work		ang				
🔊 Insights		t c				
Deliverables		JU 20K				
🗹 Tasks		ž :				
⊗ Issues		N N				
① Risks		0	50	100	150	200
				Duration Change (D.	avs)	

- b. Review the change requests on the report, with a focus on the **Red ones** as these are already late, or currently due.
- c. Click on the **link button** to open the change request details.

KPI ▼	Change Request	Link
•	Add another country	Q
	Ad Budget	Q
	Allow screen resolutions to change automaically C	®
٠	Customer Experience Center Date Change	®
٠	Do not retrofit noise control to existing plant	Q

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

[🥖] Work IQ – Insights



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Collaborating on projects

Add new feature to Change Request Details	extract data records based on record creation date.				Portfolio Program Project
Name	⁶ Add new feature to extract data records based on record creation date.		Duration Estimate		
Description			Duration Estimate Details		
Driven By	Vendor		Resource Impacts		
Implementation Date	14-Jan-20	60			
Category	Resource		Impact on Other Projects		
Priority	High Medium Low		Assumptions		
Assigned To	A Eddle Mason				
Work Effort Estimate	***		Approved / Rejected By		
Work Effort Details			Approved / Rejected Date		
			Due Date	15-Jan-20	
Cost Estimate			Status	New	
Cost Estimate Details					

Capture Lessons Learned

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1. CREATE NEW LESSON LEARNED

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

	Power Apps	Sens	sei IQ for Project
=			Handreiche Gestellt und des Gestellt
ଜ	Home		AA Tenant Renewal R300
٩	Recent	\sim	Project
\$2	Pinned	\sim	Major Project Image: Comparison of the second
Lea	dership		Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions B Lessons
ഫ്	Insights		Summary Business Case
69	Projects		A Device of the second se
Ħ	Key Dates		AA Tenant Renewal R300 Problem statem
٢	Deliverables		Description This project will update the AA Tenant Renewal system that helps schedule and manage Mega-force workgroups which develops new
Wo	rk		fabricated components for the US automotive industry. This description is open-ended, and needs some fleshing out before you
	Tasks		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.
$\overline{\otimes}$	lecuos		

c. Click +New Lesson Learned.

AA Tenant Renew	wal R300									~			Active Status	 Portfolio	Cassow Program
Major Project Active for 10 months	<		Plan	ning					E	ecution (7	Mo)				
Details Key Dates	Deliverables	Tasks	Status Updates	Issues	Risks	Decisions	Changes	Lessons	Financials	Benefits	Goals	Documents			
Lessons Learned for	Project											С	+ Ne	w Lesson Le	earned
\checkmark Name \uparrow \checkmark							Created B	у ~					Category ↑	~	
Long meeting	gs can be counter	productiv	e				OSSUS S	ervice					Business P	rocess	
Teams workin	ng across multiple	time zone	s adds to project co	mplexity		Long meeting	gs can be count	er productive					Business P	rocess	

- d. Fill in the **Name field**. This field 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.



	C	Quick Create: Lesson L	earned	×
D		Name	*	
		Category		
		Status	Active	
		Observation		
E		Recommendation		
		Lesson Learned		
	_	Action Taken		
	-			
		G	Save and Cloke	
		U		ncer

2. UPDATE LESSONS LEARNED

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

E Power Apps	Sens	ei IQ for Project							
=		← 🔚 Save 🛱 Sav	ve & Close 🛛 + New Project 🤹 Open in Project 🛍 Delete Project 🌵 Open in Teams 🄹 Ope						
份 Home		AA Tenant Renew	val R300						
Recent	\sim	Project							
🖈 Pinned	~	Major Project Active for 10 months	< Planning						
Leadership		Details Key Dates	Deliverables Tasks Status Updates Issues Risks Decisions B Lessons						
渝 Insights	_	Summary	Business Case						
E Projects									
🛱 Key Dates		🗅 Name	* AA Tenant Renewal R300 Problem Statement						
Deliverables		Description	Description This project will update the AA Tenant Renewal system that helps schedule and manage Mega-force workgroups which develops new						
Work			fabricated components for the US automotive industry. This description is open-ended, and needs some fleshing out before you						
🗹 Tasks			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.						
⊗ Issues									

c. Select the Lesson Learned to be updated from the list.

AA Te Project	enant Renev	wal R300												Active Status	Portfolio	Casso Progra
Major Pr Active fo	r oject r 10 months	<		Planr	ning					E	xecution (7	Mo)				
Details	Key Dates	Deliverables	Tasks	Status Updates	Issues	Risks	Decisions	Changes	Lessons	Financials	Benefits	Goals	Documents			
Lesso	ons Learned for F	Project												+ N	ew Lesson L	earned
	\bullet Name $\uparrow \lor$							Created B	By ∨					Category ↑	\sim	
C	Long meeting	gs can be counter	productiv	e				OSSUS	Service					Business F	rocess	
	Teams workin	ng across multiple	time zone	es adds to project cor	nplexity			Bill Coll	ett					Business F	rocess	_
	Key projects r	resources are in d	emand by	many PMs during th	e same tin	ne period	s	Bill Colle	ett					Resource		
	Project team	consistency ensu	res greater	success to a project				Bill Colle	ett					Resource		

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



*	- 🗉 🕒 🖆 s	ave & Close 🕂 New 🔟 Delete 🖒 Refresh 🖻 Share 🖾 Email a Link			
	Long meetings can l	be counter productive		 Program	AA Tenant Renewal R300 Project
	Details				
	Name	Long meetings can be counter productive	Observation		
	Category	Business Process	Decommondation		
			Recommendation		
			Lesson Learned		
			Action Taken		

Manage Project Documents

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1. UPLOAD NEW DOCUMENTS

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

-	Power Apps	Sens	ei IQ for Project						
=			← 🗟 Save 🍪 Save & Close 🕂 New Project 🔹 Open in Project 🗈 Delete Project 🖷	🖡 Open in Teams 🔹 Open in SharePoint 🖒 Refresh 🛛 Process 🗸 🖻 S					
ŵ	Home		AA Tenant Renewal R300	A					
C	Recent	\sim	Project	SI					
\$P	Pinned	\sim	Major Project Active for 10 months Planning	Execution (7 Mo)					
Lead	lership		Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions	Changes Lessons Financials Benefits B Documents					
ณ์	Insights								
E)	Projects	A	Summary	Business Case					
Ē	Key Dates		AA Tenant Renewal R300	Problem Statement Megaforce tenants need to be integrated into our corporate environment for use by all					
٢	Deliverables		Description This project will update the AA Tenant Renewal system that helps	product demonstrators.					
Wor	k		schedule and manage Mega-lorce workgroups which develops new fabricated components for the US automotive industry. This description is open-ended, and needs some fleshing out before you						
	Tasks		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						
\otimes	Issues								
\bigcirc	Risks			Business Benefits Common operations for all groups and departments					

c. Click +Upload.

Active for 1	ject 0 months	<	< Planning							
Details	Key Dates	Deliverables	Tasks	Status	Updates	Issues	Risks	Decisions	C	
Projec	t Document	s								
Search	h	C T	Jpload	🚯 Oper	in SharePo	oint 🕐	Refresh	Show as	List	
AN	Anagers G	uide to Evalua	ting		AA Tenar	nt Renew	/al R300	J Business		
A N Citi	lanagers G zen Particip	uide to Evalua ation.pdf	ting	1	AA Tenar Case.doc	nt Renew x	/al R300) Business		

- d. Browse and select the new document to be added to the project repository.
- e. Alternatively, you can click on **Open in SharePoint** to edit the document in native SharePoint. This gives you 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.

AA Tenant Renewal R300		
ajor Project <	Planning	Execution (7 Mo)
Details Key Dates Deliverables Task	s Status Updates Issues Risks Decisions C	Changes Lessons Financials Benefits Goa
Project Documents		
Search 🔎 🕇 Upload	🚯 Open in SharePoint 💍 Refresh 🖩 Show as Lis	t
	C	
A Managers Guide to Evaluating	AA Tenant Renewal R300 Business	Case Study of Employment.pdf
Kenneth Steiness	Albert Connell	Kenneth Steiness
Created: Feb 13, 2020 2:10 AM	Chatted: Nov 17, 2020 T0:14 AM	Created: Peb 15, 2020 210 AM
	•	
MedPartner office expansion.xlsx	Network Terrain Data Sheet.pdf	Project Charter.docx
Nate Auchter	Kenneth Steiness	Albert Connell

d. Alternatively, you can click on **Open in SharePoint** to edit the document in native SharePoint. This gives you more document management functionality, including working with folders and creating new documents from scratch.



