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.

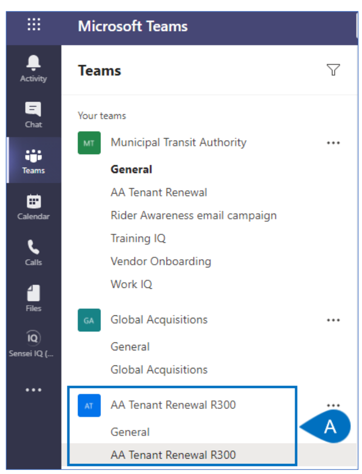
1. Project collaboration in Teams
2. Updating project tasks
3. Manage project issues
4. Manage project risks
5. Track project decisions
6. Record and manage change requests
7. Maintain project documents
8. Capture lessons learned

Project collaboration in Teams

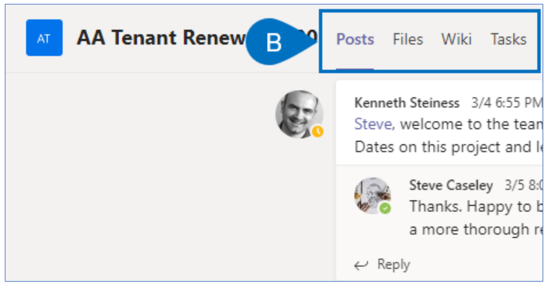
Team Member **Microsoft Teams**

1. ACCESS A PROJECT IQ TEAM/CHANNEL

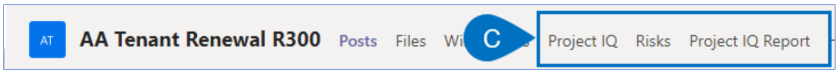
a. Find and open the **project team and channel** in Microsoft Teams.



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.

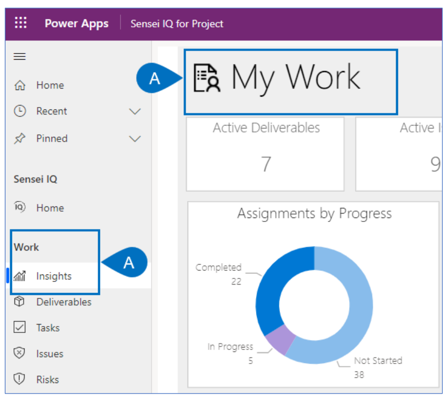


Updating project tasks

Team Member **Work IQ – Insights**

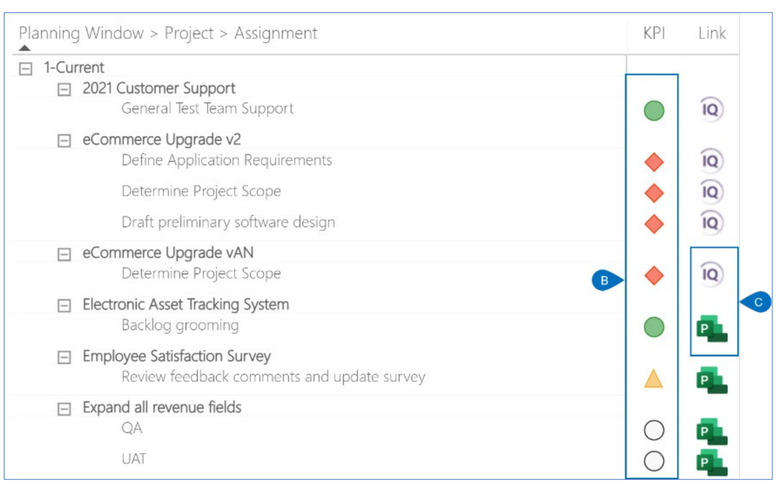
1. IDENTIFY AND UPDATE CURRENT WORK ASSIGNMENTS

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

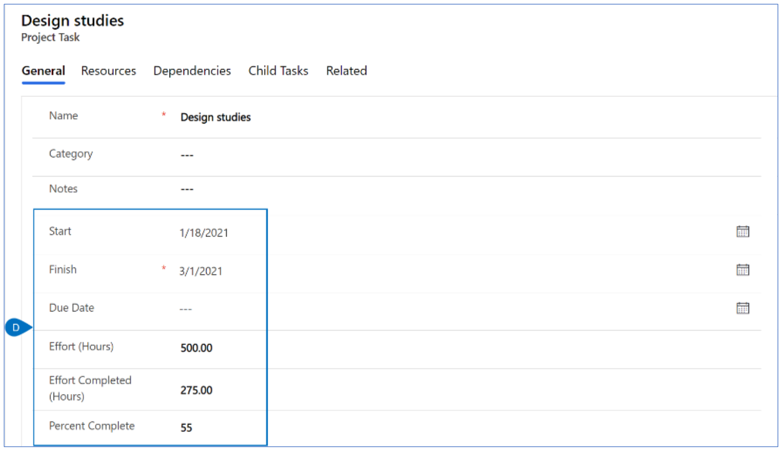


b. Review the tasks in the **1-Current** area on the report, with a focus on the **Red and Yellow tasks** as these are already late, or currently due.

c. Click on the **link button** to open the task detail in the appropriate scheduling tool.



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.

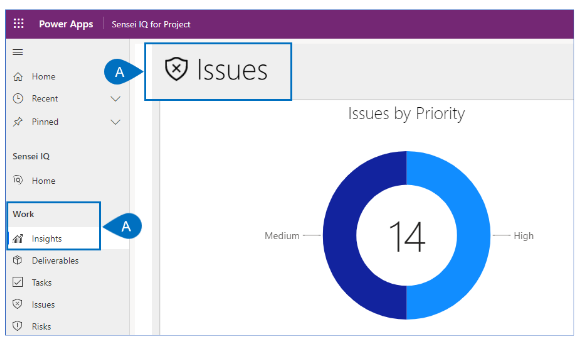


Manage project Issues

Team Member **Work IQ – Insights**

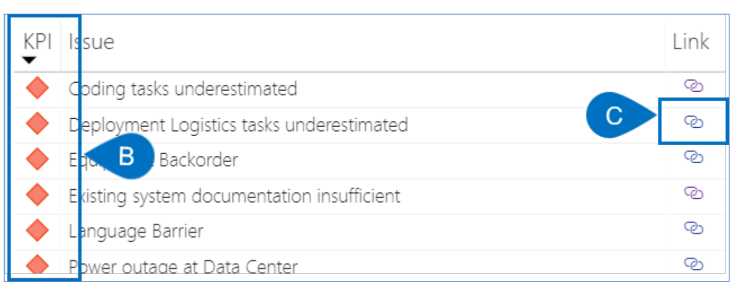
1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

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



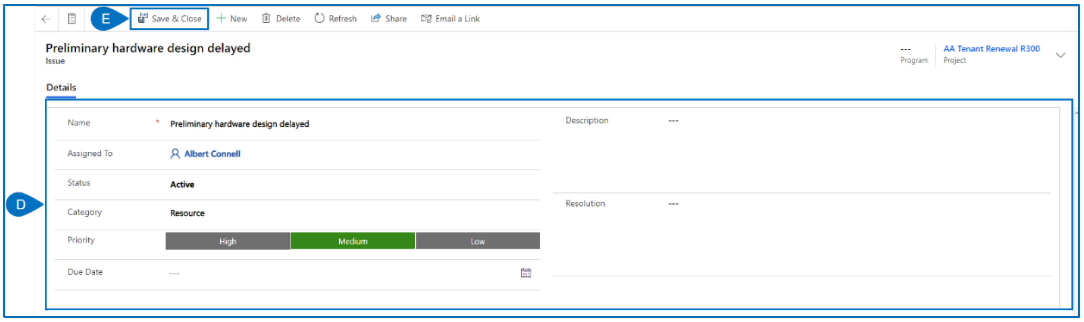
b. Review the issues on the report, with a focus on the **Red ones** as these are already late, or currently due.

c. Click on the **link button** to open the issue details.



d. Update any field, as required.

e. Click **Save & Close.**

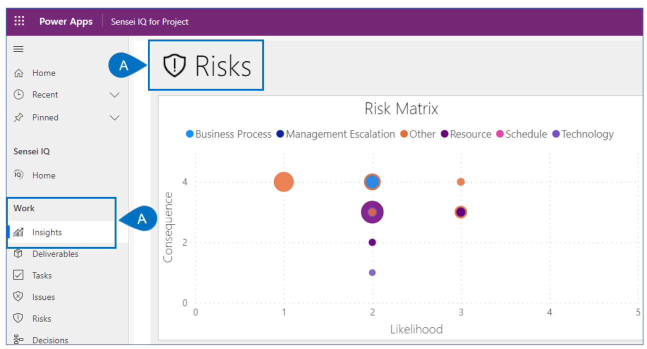


Manage project Risks

Team Member **Work IQ - Insights**

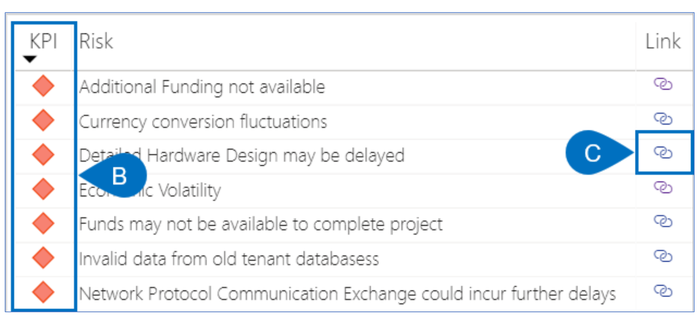
1. IDENTIFY AND UPDATE CURRENT RISKS ASSIGNED TO YOU

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



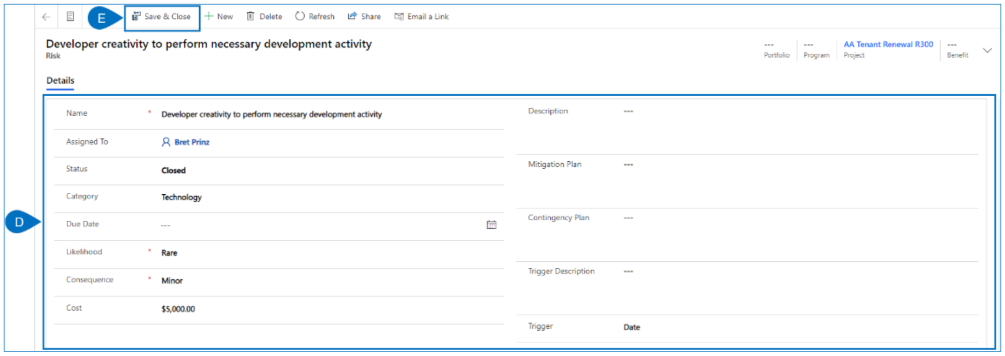
b. Review the risks on the report, with a focus on the **Red ones** as these are already late, or currently due.

c. Click on the **link button** to open the risk details.



d. Update any field, as required.

e. Click **Save & Close.**



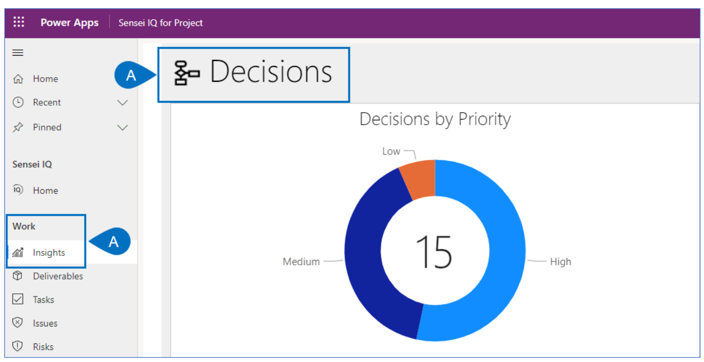
Track project Decisions

Team Member

Work IQ – Insights

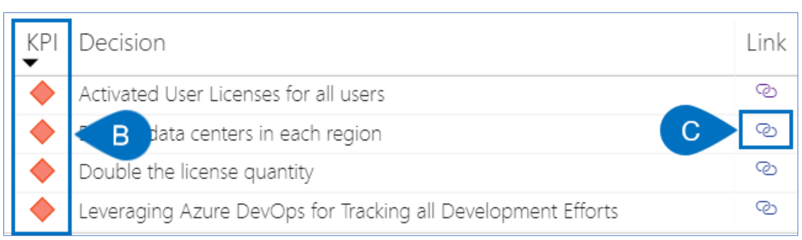
1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

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



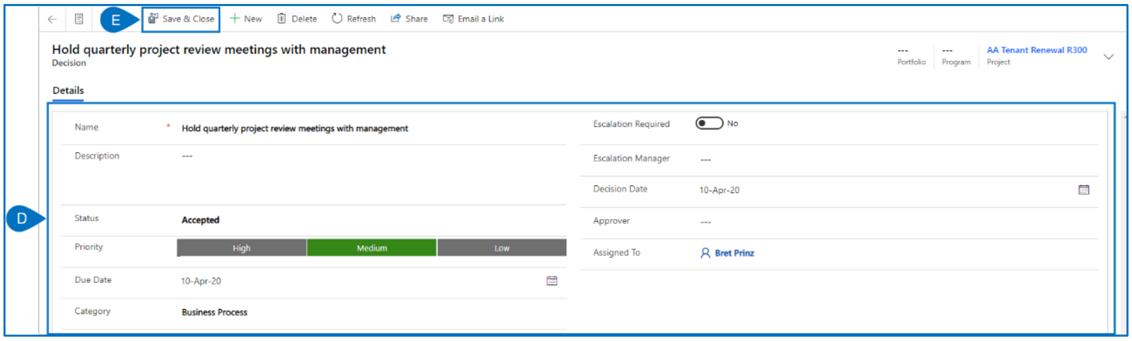
b. Review the decisions on the report, with a focus on the **Red ones** as these are already late, or currently due.

c. Click on the **link button** to open the decision details.



d. Update any field, as required.

e. Click **Save & Close.**

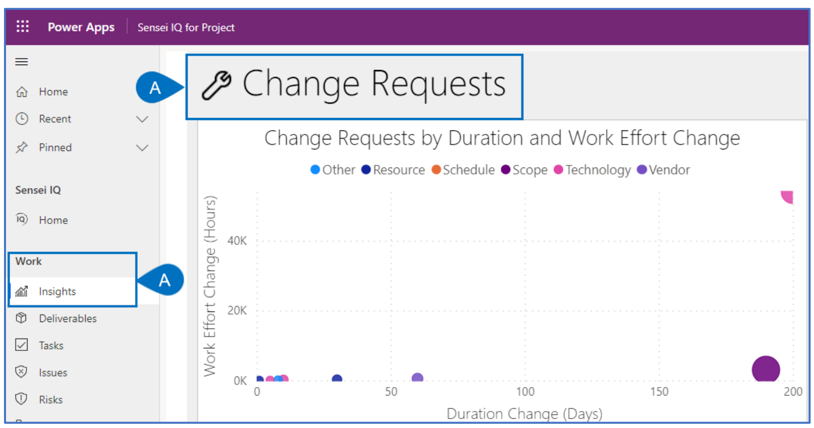


Record and manage Change Requests

Team Member **Work IQ – Insights**

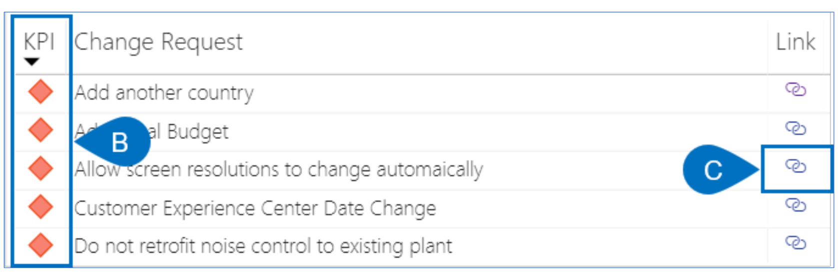
1. IDENTIFY AND UPDATE CURRENT CHANGE REQUESTS ASSIGNED TO YOU

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



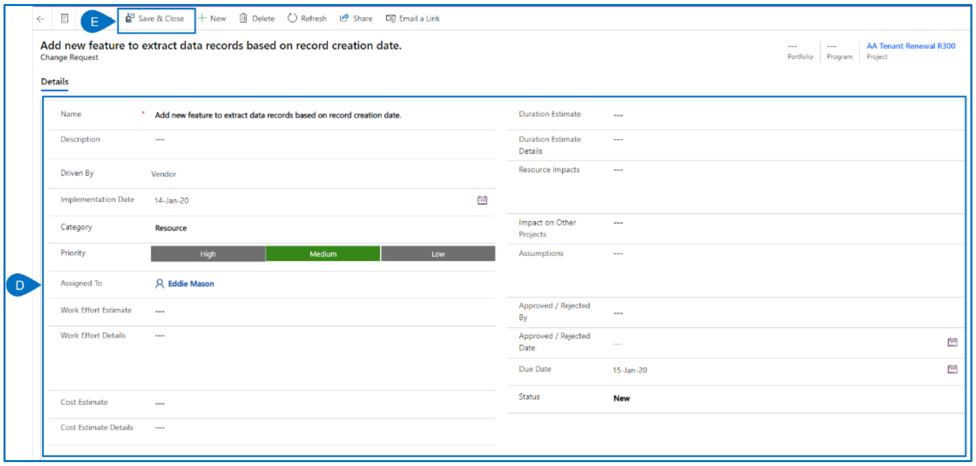
b. Review the change requests on the report, with a focus on the **Red ones** as these are already late, or currently due.

c. Click on the **link button** to open the change request details.



d. Update any field, as required.

e. Click **Save & Close.**



Capture Lessons Learned

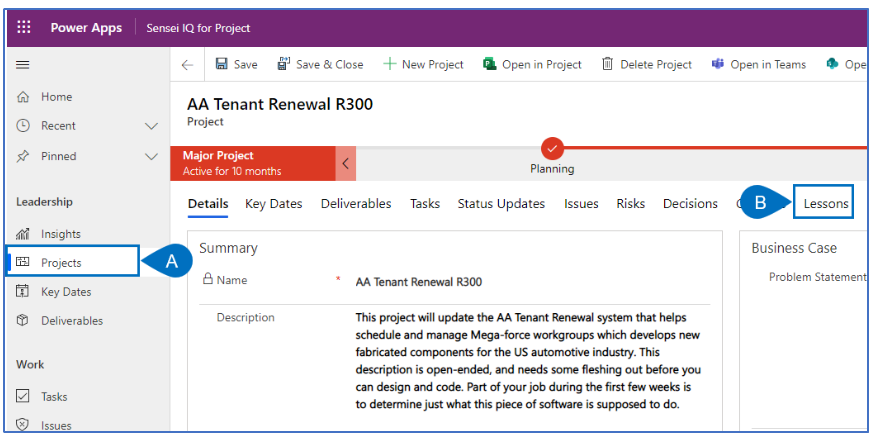
Team Member

Project IQ – Lessons tab

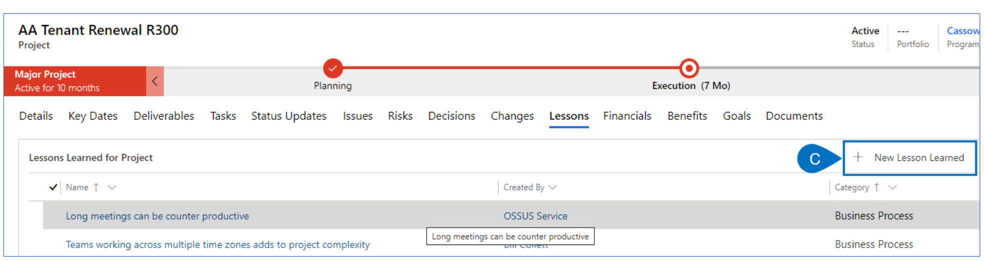
1. CREATE NEW LESSON LEARNED

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

b. Click the **Lessons** tab.



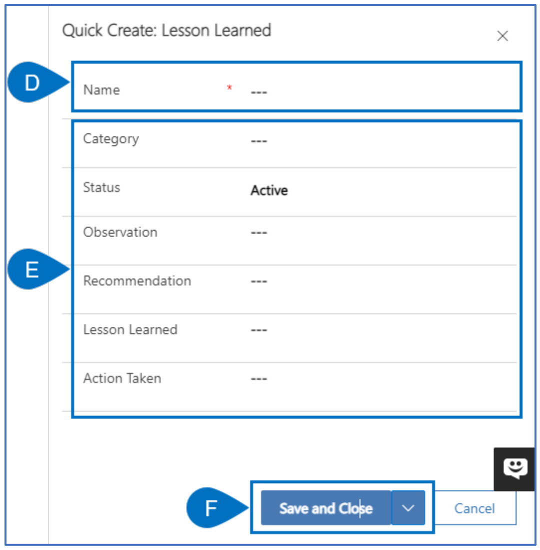
c. Click **+New Lesson Learned.**



d. Fill in the Name field. 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.

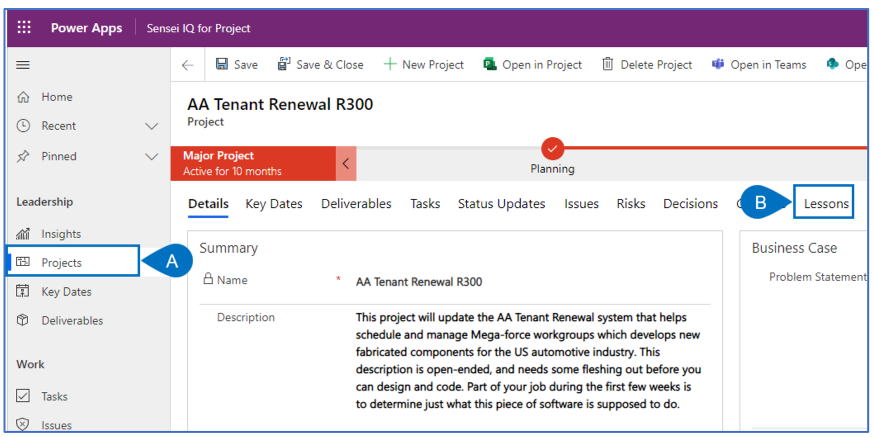
f. Click **Save and Close**.



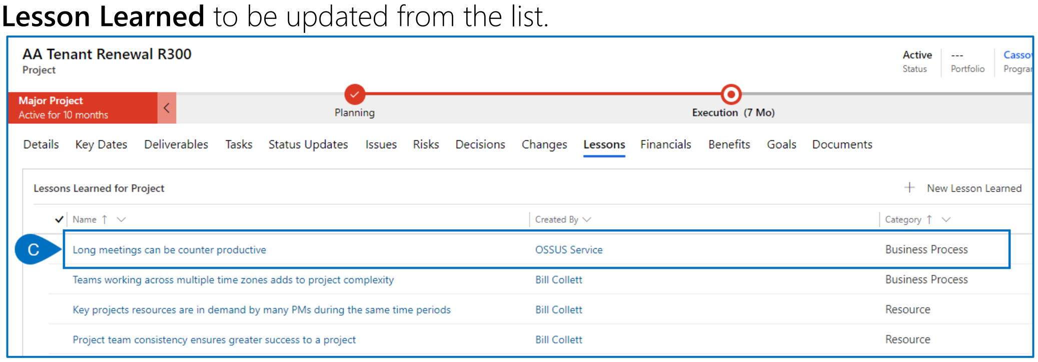
2. UPDATE LESSONS LEARNED

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

b. Click the **Lessons** tab.

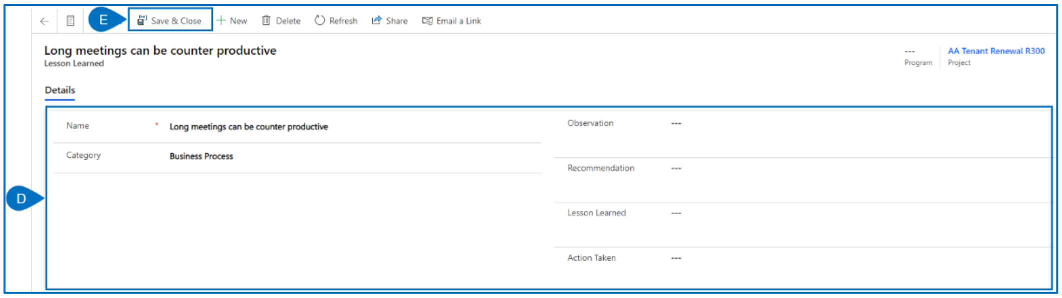


c. Select the **Lesson Learned** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



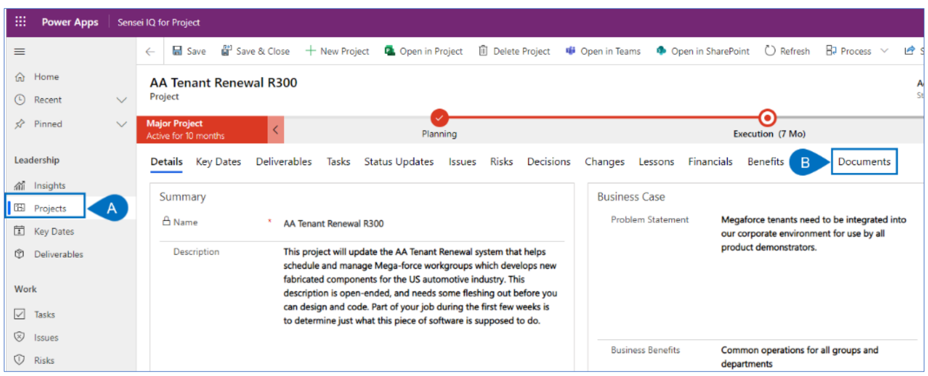
Manage Project Documents

Team Member | Project IQ – Documents tab

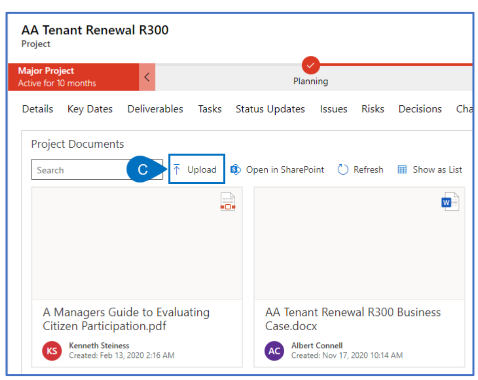
1. UPLOAD NEW DOCUMENTS

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

b. Click the **Documents** tab.

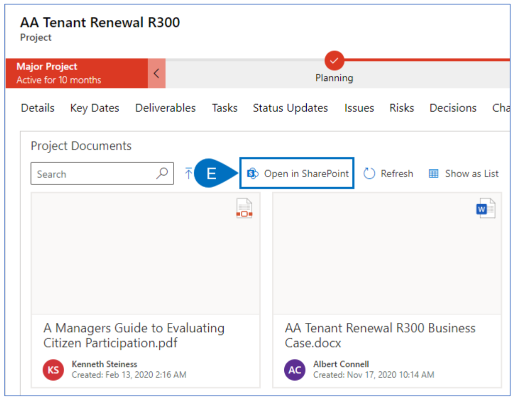


c. Click **+Upload.**



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

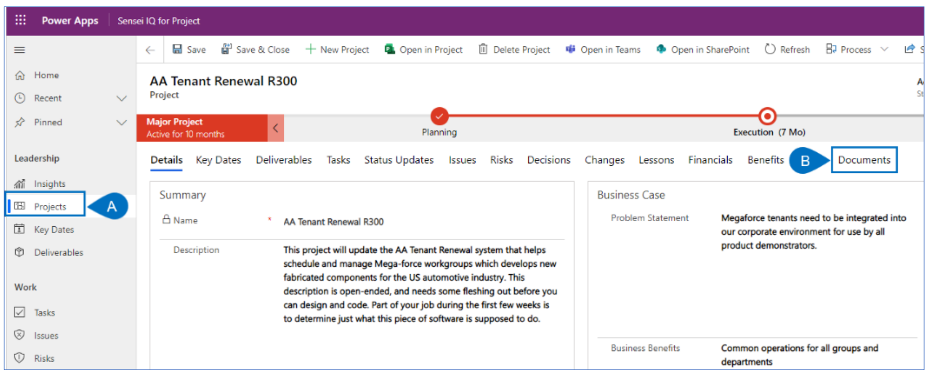
e. Alternatively, you can click on **Open in SharePoint** to edit the document in native SharePoint. This gives you more document management functionality, including working with folders and creating new documents from scratch.



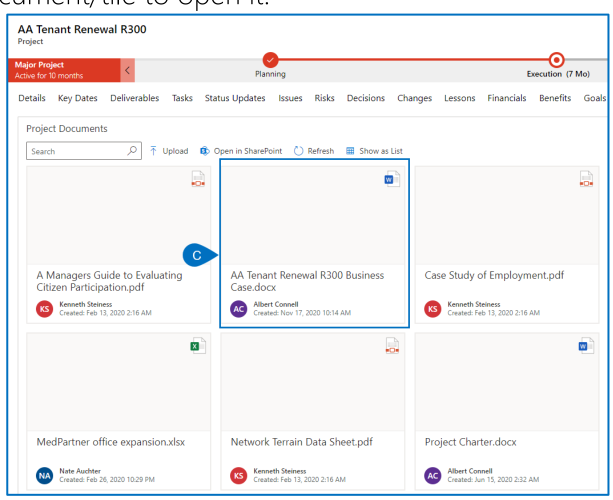
2. VIEW OR UPDATE EXISTING DOCUMENTS

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

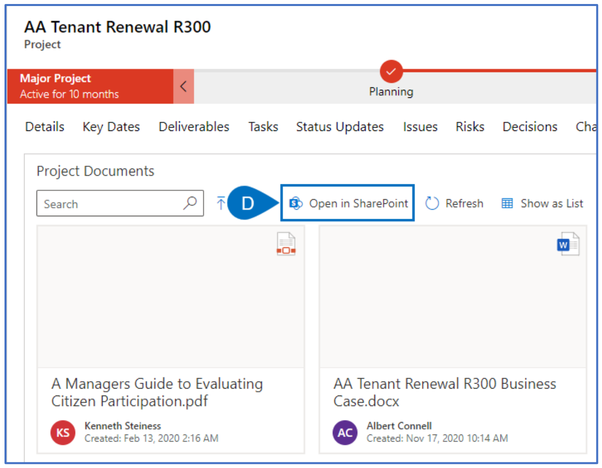
b. Click the **Documents** tab.



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



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.


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

