

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

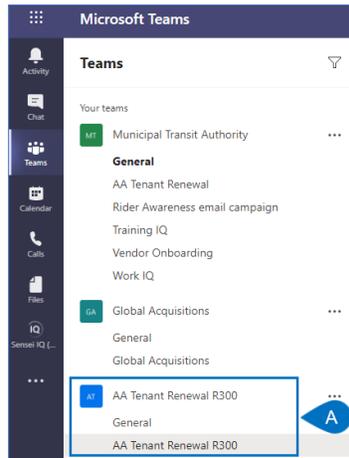
## Project collaboration in Teams

 **Team Member**

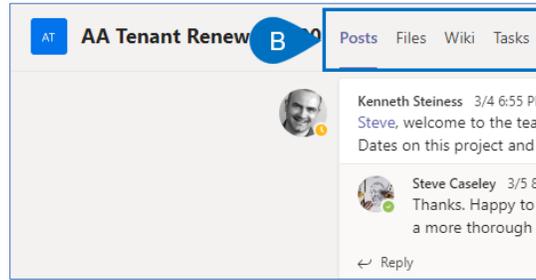
 **Microsoft Teams**

### 1. ACCESS A PROJECT IQ TEAM/CHANNEL

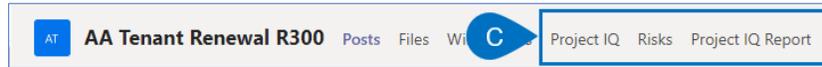
- a. Find and open the **project team and channel** in Microsoft Teams.



- 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.



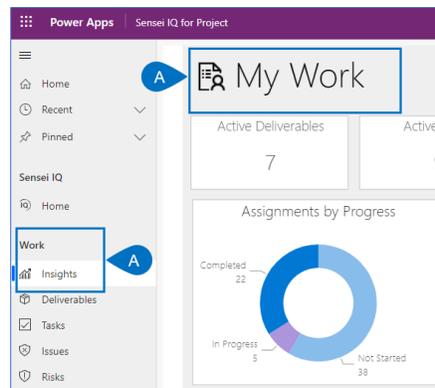
## Updating project tasks

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.

Planning Window > Project > Assignment	KPI	Link
1-Current		
2021 Customer Support General Test Team Support	<span style="color: green;">●</span>	
eCommerce Upgrade v2 Define Application Requirements	<span style="color: red;">◆</span>	
Determine Project Scope	<span style="color: red;">◆</span>	
Draft preliminary software design	<span style="color: red;">◆</span>	
eCommerce Upgrade vAN Determine Project Scope	<span style="color: red;">◆</span>	
Electronic Asset Tracking System Backlog grooming	<span style="color: green;">●</span>	
Employee Satisfaction Survey Review feedback comments and update survey	<span style="color: yellow;">▲</span>	
Expand all revenue fields QA	<span style="color: grey;">○</span>	
UAT	<span style="color: grey;">○</span>	

- 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.

Design studies		
Project Task		
General Resources Dependencies Child 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	

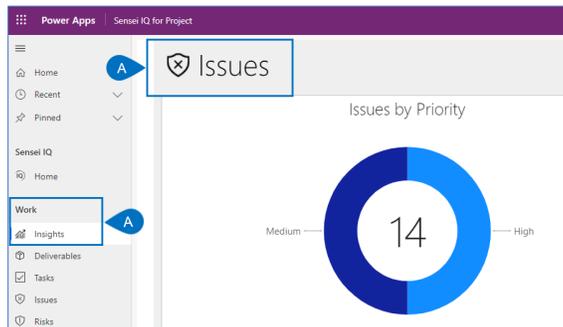
## Manage project Issues

Team Member

Work IQ – Insights

### 1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

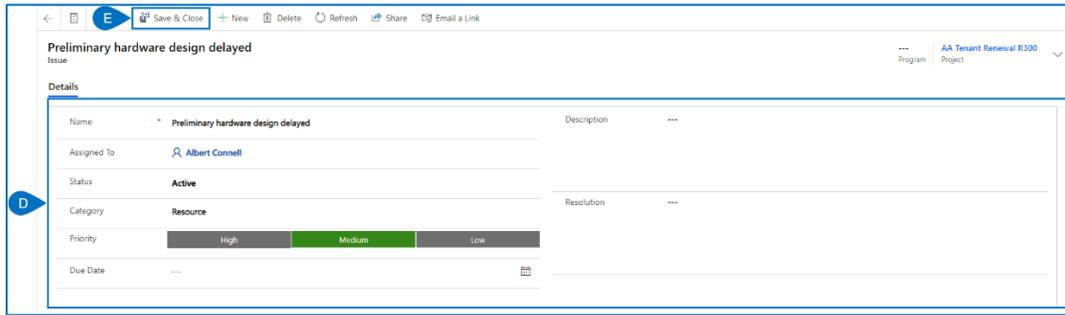
- a. Ensure you are in Work IQ, select **Insights**, and ensure you are on the **Issues** page.



- 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.

KPI	Issue	Link
	Coding tasks underestimated	
	Deployment Logistics tasks underestimated	
	Equipment Backorder	
	Existing system documentation insufficient	
	Language Barrier	
	Power outage at Data Center	

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



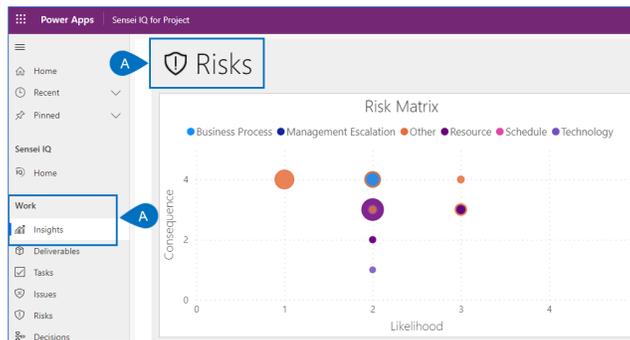
## Manage project Risks

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.



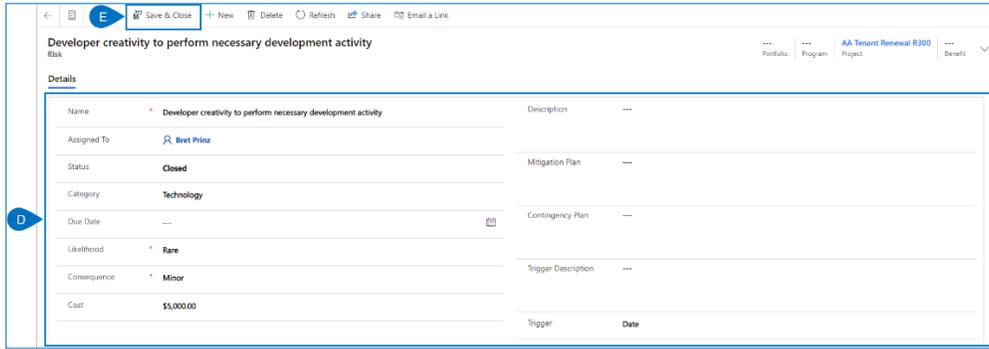
b. Review the risks on the report, with a focus on the **Red ones** as these are already late, or currently due.

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

KPI	Risk	Link
	Additional Funding not available	
	Currency conversion fluctuations	
	Detailed Hardware Design may be delayed	
	Economic Volatility	
	Funds may not be available to complete project	
	Invalid data from old tenant databasess	
	Network Protocol Communication Exchange could incur further delays	

d. Update any field, as required.

e. Click **Save & Close**.



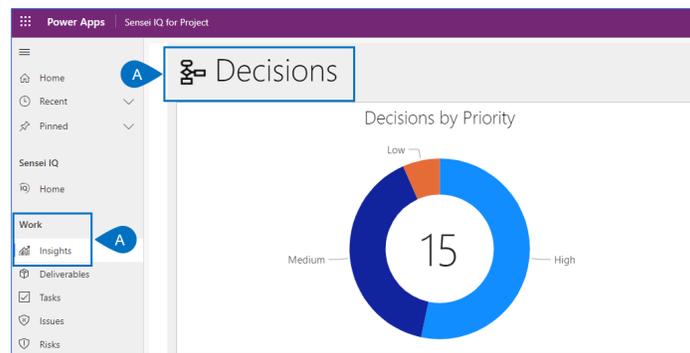
## Track project Decisions

Team Member

Work IQ – Insights

### 1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

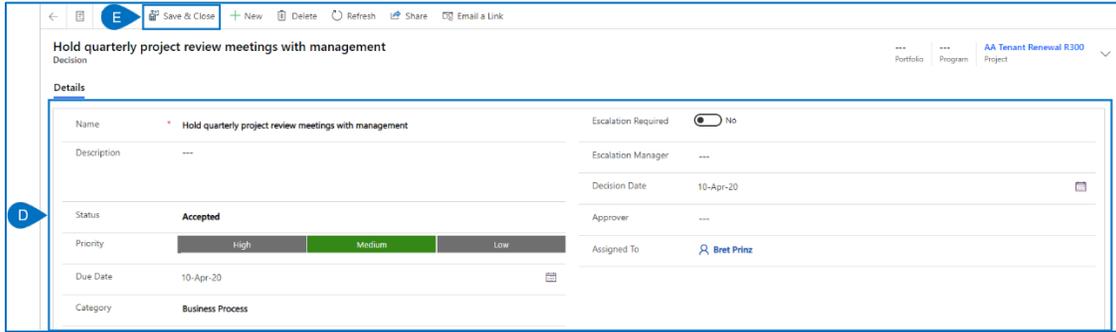
a. Ensure you are in Work IQ, select **Insights**, and ensure you are on the **Decisions** page.



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.

KPI	Decision	Link
	Activated User Licenses for all users	
	data centers in each region	
	Double the license quantity	
	Leveraging Azure DevOps for Tracking all Development Efforts	

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



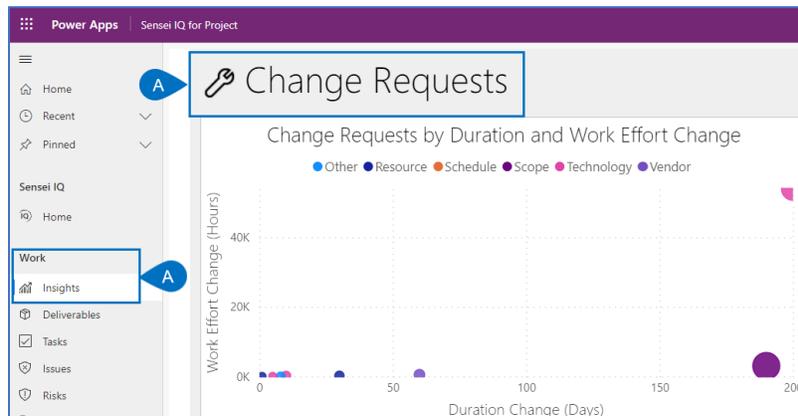
## Record and manage Change Requests

Team Member

Work IQ – Insights

### 1. IDENTIFY AND UPDATE CURRENT CHANGE REQUESTS ASSIGNED TO YOU

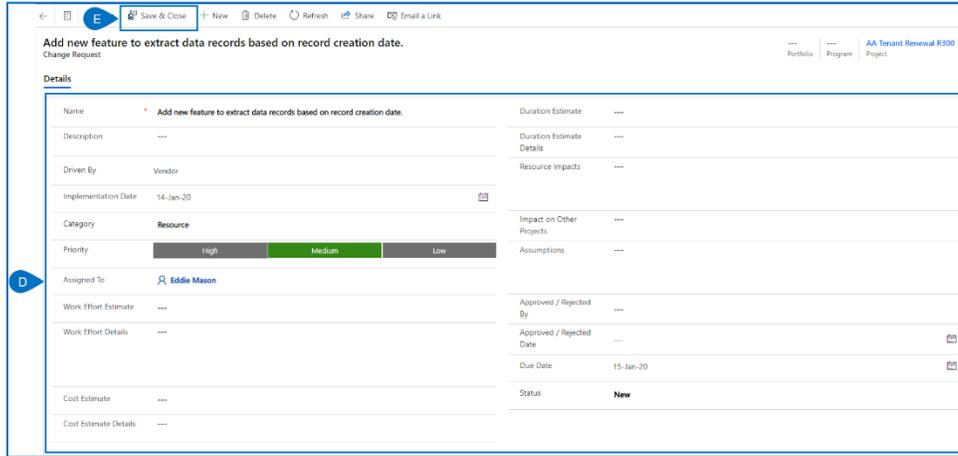
a. Ensure you are in Work IQ, select **Insights**, and ensure you are on the **Change Requests** page.



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.

KPI	Change Request	Link
	Add another country	
	Adjust Budget	
	Allow screen resolutions to change automatically	
	Customer Experience Center Date Change	
	Do not retrofit noise control to existing plant	

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



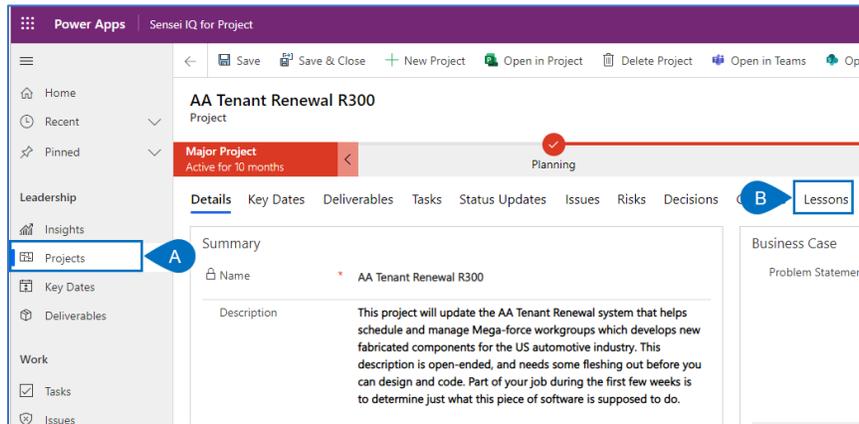
## Capture Lessons Learned

Team Member

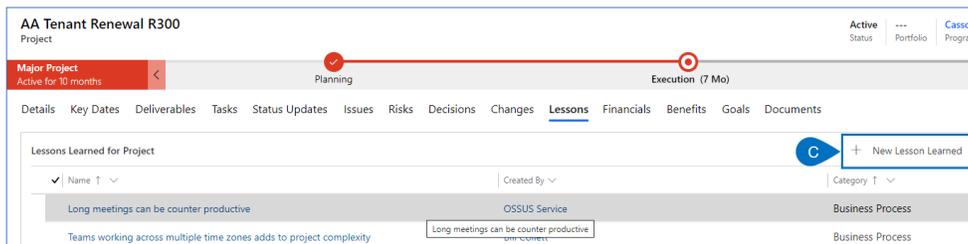
Project IQ – Lessons tab

### 1. CREATE NEW LESSON LEARNED

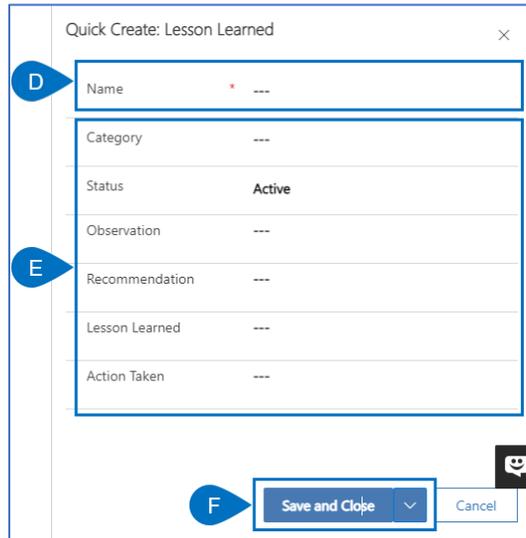
- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Lessons** tab.



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

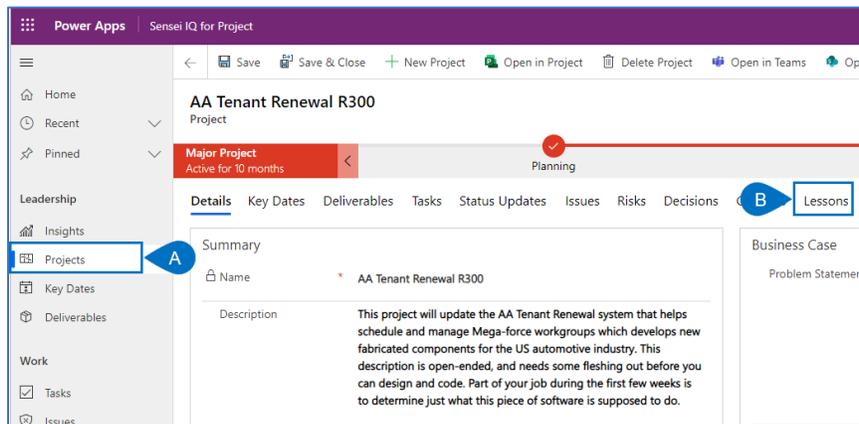


- d. Fill in the **Name** field. This field is mandatory, and it should be clear and concise to help users identify the Lesson Learned in screens, reports, and dashboards.
- e. Provide additional details in the remaining fields.
- f. Click **Save and Close**.

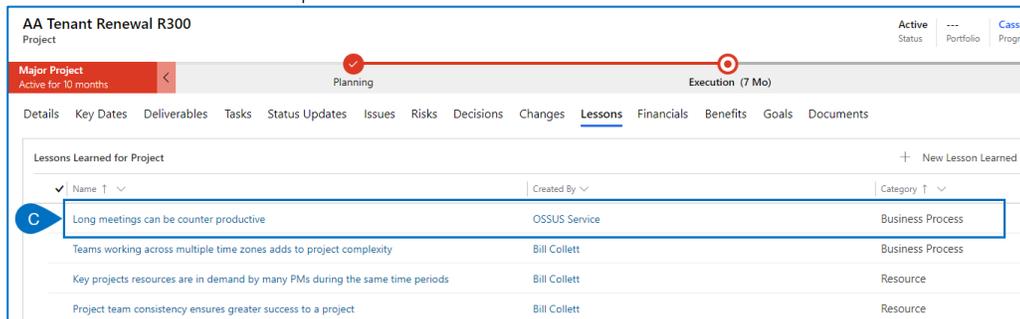


## 2. UPDATE LESSONS LEARNED

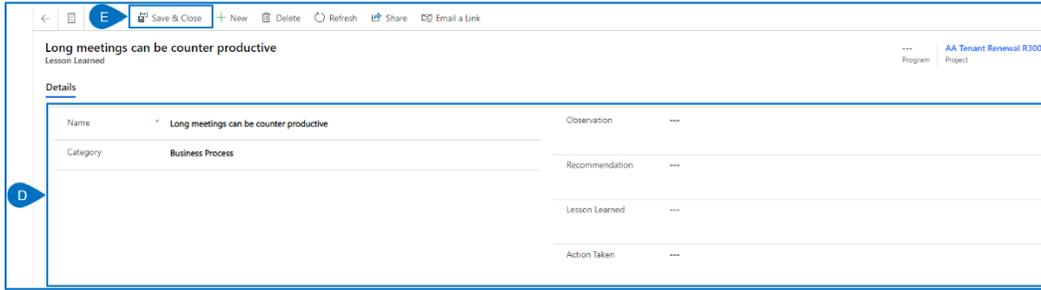
- a. Ensure you have the appropriate project open in **Project IQ**.
- b. Click the **Lessons** tab.



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



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



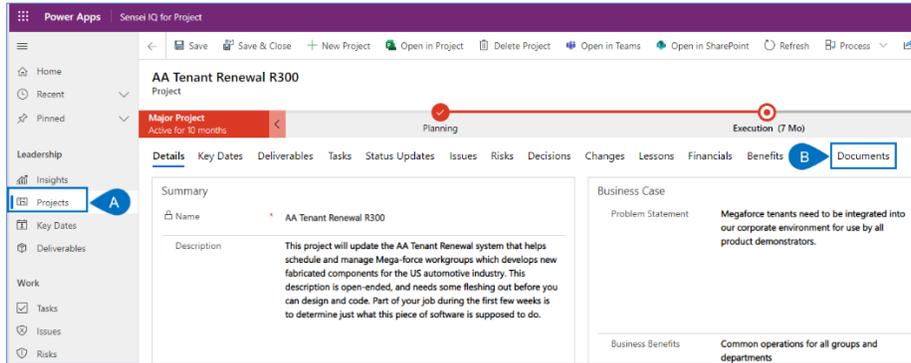
# Manage Project Documents

Team Member

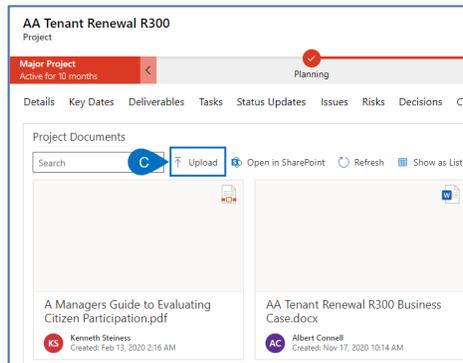
Project IQ – Documents tab

## 1. UPLOAD NEW DOCUMENTS

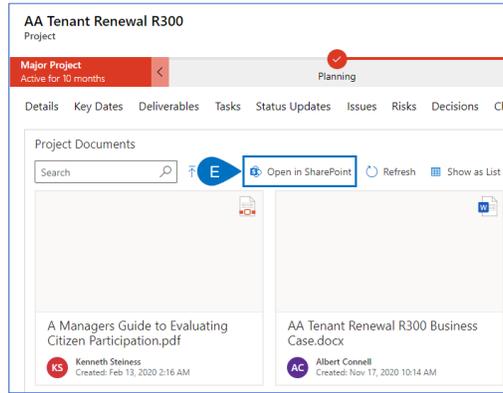
- Ensure you have the appropriate project open in **Project IQ**.
- Click the **Documents** tab.



- Click **+Upload**.

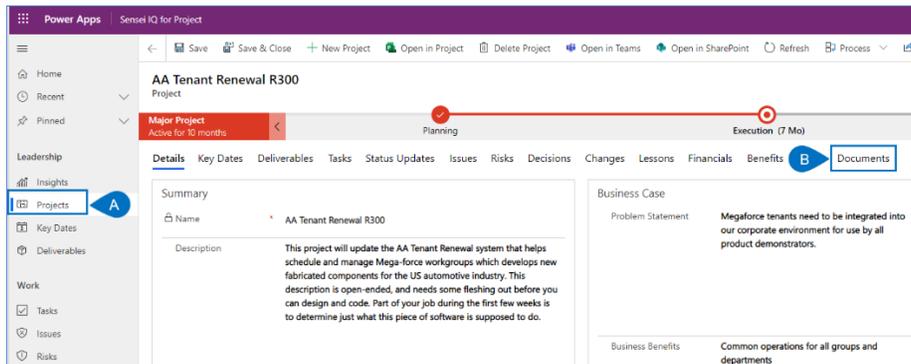


- Browse and select** the new document to be added to the project repository.
- Alternatively, you can click on **Open in SharePoint** to edit the document in native SharePoint. This gives you more document management functionality, including working with folders and creating new documents from scratch.

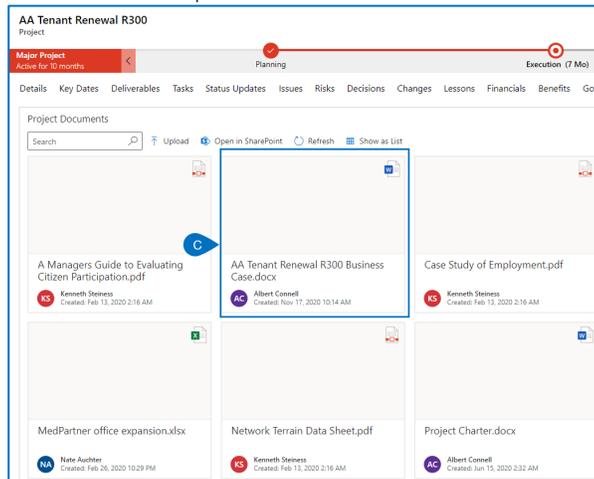


## 2. VIEW OR UPDATE EXISTING DOCUMENTS

- 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.

The screenshot displays a project management interface for a project titled "AA Tenant Renewal R300". The interface includes a navigation bar with tabs for "Details", "Key Dates", "Deliverables", "Tasks", "Status Updates", "Issues", "Risks", "Decisions", and "Change". A "Project Documents" section is visible, featuring a search bar and a list of documents. Two document thumbnails are shown: "A Managers Guide to Evaluating Citizen Participation.pdf" by Kenneth Steiness, created on Feb 13, 2020 at 2:16 AM, and "AA Tenant Renewal R300 Business Case.docx" by Albert Connell, created on Nov 17, 2020 at 10:14 AM. A blue callout box highlights the "Open in SharePoint" button above the second document thumbnail.