Overview

This Job Aid defines the steps to follow for finalizing the project plan. This Job Aid is based on the assumption that a new project, complete with the appropriate support details, has been created in Project IQ and that the project schedule has been defined in Project for the web.

The following are four (4) core actions required for finalizing the project plan. These need not be sequential actions and you may skip some based on your project delivery requirements.

1. Validate Key Dates and Deliverables
2. Define the Financial forecast
3. Advance the project to the next stage
4. Add the project to Microsoft Teams

Validate Key Dates and Deliverables

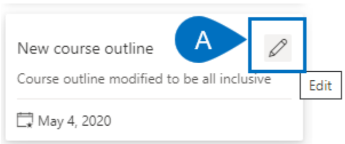
Project Manager

Project for the web – Grid or Timeline view

Project IQ – Key Dates and Deliverables tabs

1. UPDATE KEY DATES

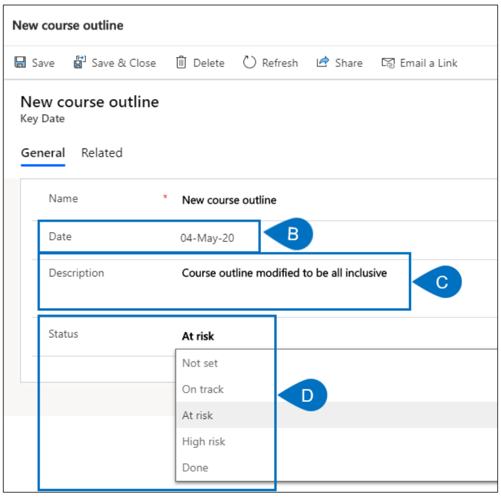
a. Open the **Key Dates** tab for the project and compare the approved dates to the current Project for the web schedule. If the approved Key Date is different than project schedule, select the **pencil** icon (or double click the Key Date card).



b. Update the **Date** to reflect the current schedule.

c. Add any additional details in the **Description** field to better describe the new key date.

d. Set the **Status** as appropriate based on how much the date has changed from the original expectation.



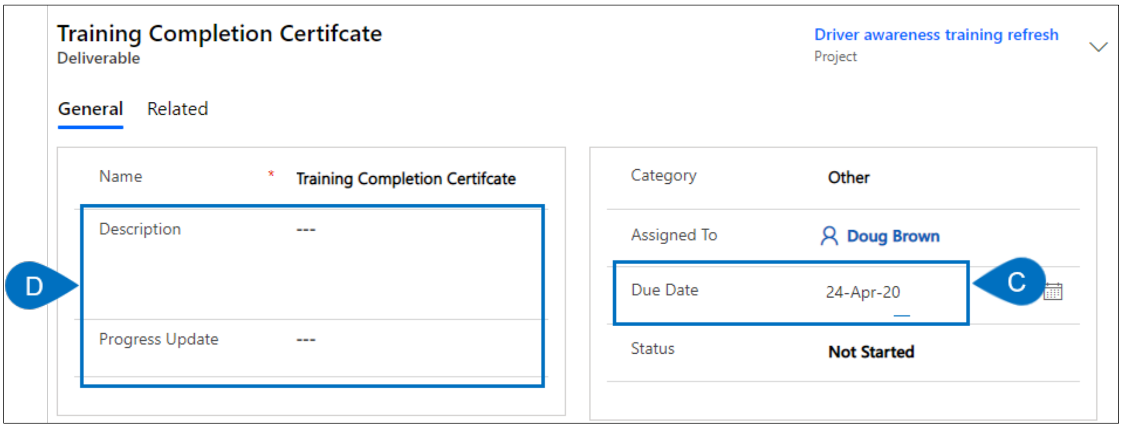
2. UPDATE DELIVERABLES

a. Open the **Deliverables** tab for the project and compare the approved dates to the current Project for the web schedule. If the approved Deliverable date is different than the project schedule, select the **Deliverable row**

b. Click **Edit** (or double click the Deliverable name).

c. Update the **Due Date** to reflect the current schedule.

d. Add any additional details in the **Progress Update** field to better describe the status of the deliverable.



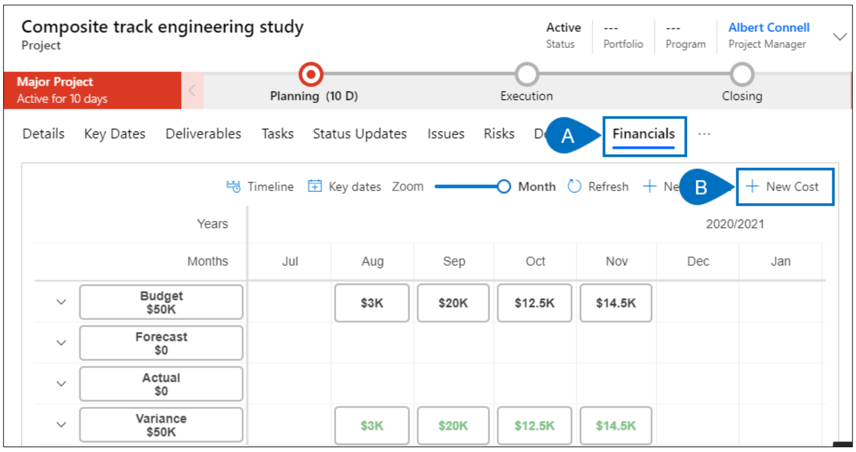
Define the financial forecast

Project Manager | **Project IQ – Financials tab**

1. CREATE THE PROJECT FORECAST

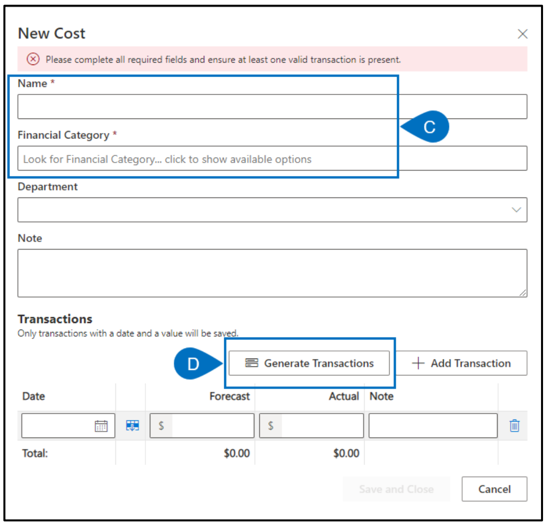
a. Click the **Financials** tab.

b. Click **+New Cost**.



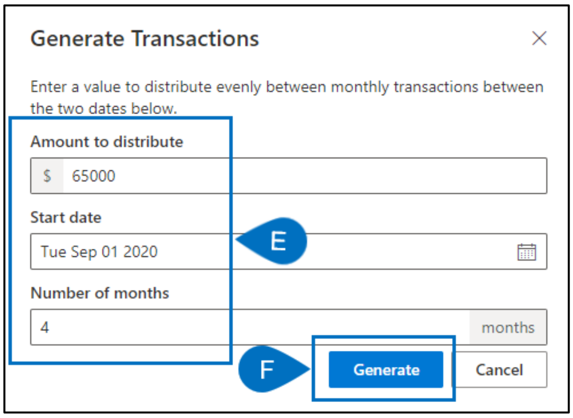
c. Complete the **New Cost** form. The **Name** and **Financial Category** are mandatory.

d. Click the **Generate Transactions** button.



e. Enter the **Amount to distribute** and the forecast **Start date** and **Number of months**

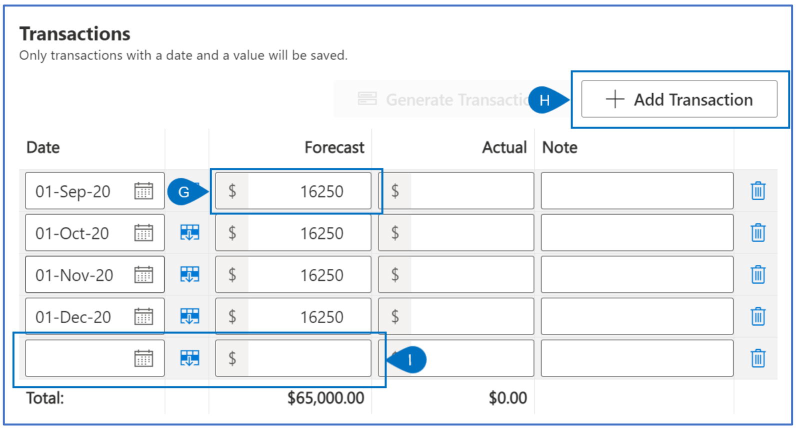
f. Next, click **Generate** to have the forecast spread across the desired dates.



g. **Edit** any individual monthly amount to **contour the forecast**.

h. Click **+ Add Transaction** to add additional months to the forecast.

i. Enter the **Date** and **Forecast**.

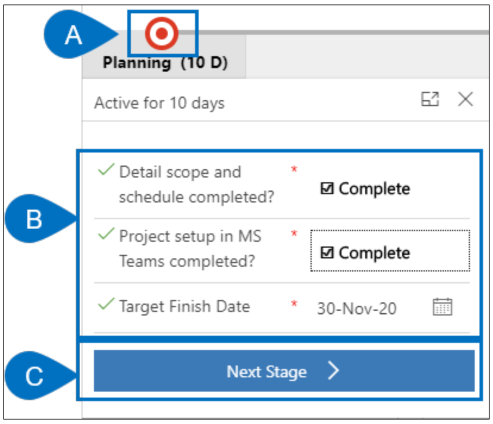


Advance the project to the next stage

Project Manager | **Project IQ**

1. ADVANCE THE PROJECT

a. Click on the current stage, which is identifiable by the **red dot/red circle** icon.
b. Validate that you have completed all the **checklist items**.
c. Next click **Next Stage** to advance the project.



Create a Microsoft Teams Channel for the project

Project Manager | **Sensei IQ**

1. SETUP TEAMS

a. Open Microsoft Teams and, select the **Sensei IQ** app from the navigation pane on the left.
b. Ensure you are on the **Projects** tab.
c. Select the **Teams** icon for your new project. This will create the appropriate Team and Channel and then open it in Teams.