

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.

New course ou	tline				
🖬 Save 📓 S	ave & Close	🗓 Delete	🖒 Refresh	🖄 Share	🖾 Email a Link
New cours Key Date	e outline				
General Rel	lated				
Name		New course	outline		
Date		04-May-20	В		
Descriptio	'n	Course out	ine modified t	o be all inclus	ive
Status		At risk			
		Not set			
		On track			
		At risk			
		High risk			
		Done			



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).

Deliverables for Project			B 🖉 Edit	📋 Delete Deliverable
\checkmark Name \checkmark	Category \checkmark	Assigned To \checkmark	Due Date \checkmark	Status Reason \checkmark
✓ ► A mpletion Certifcate	Other	Doug Brown	🔶 24-Apr-20	Not Started

- 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.

	Training Completion Certifcate	Driver awareness training refresh Project	
	General Related		
	Name * Training Completion Certifcate	Category	Other
	Description	Assigned To	
D		Due Date	24-Apr-20
	Progress Update	Status	Not Started

Define the financial forecast

👗 🛛 Project Manager

Project IQ – Financials tab

1. CREATE THE PROJECT FORECAST

- a. Click the **Financials** tab.
- b. Click +New Cost.

Comp Project	osite track	engineering	g study	Activ Status	e Portfolio	A Program Pr	Ibert Connell		
Major Pro Active for	oject 10 days	<	Planning (10 D)		Execution		Cle	osing
Details	Key Dates	Deliverables	Tasks Sta	atus Updates	Issues R	isks DA	Financ	ials	
		넁	Timeline 茸	Key dates Zoo	om —	-O Month 🕻) Refresh 🕂	Ne	+ New Cost
		Years						2020/	2021
		Months	Jul	Aug	Sep	Oct	Nov	Dec	Jan
~	Bu \$	idget 50K		\$3K	\$20K	\$12.5K	\$14.5K		
~	For	ecast \$0							
~	Ac	stual							
~	Var \$	iance 50K		\$3К	\$20K	\$12.5K	\$14.5K		

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



Completing the project plan

d. Click the Generate Transactions button.

New Cost			×
Please complet	e all requ	ired fields and ensure at least one valid transaction is	present.
Name *			
Financial Category	*		
Look for Financial	Catego	ry click to show available options	
Department			
			~
Note			
			li li
Transactions			
Only transactions with	a date ar	d a value will be saved.	
		D 🗏 Generate Transaction	ns + Add Transaction
Date		Forecast Actual	Note
		\$ \$	İ
Total:	_	\$0.00 \$0.00	
			ave and Close Cancel

- 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.

Generate Transactions $\qquad \qquad							
Enter a value to distribute evenly between monthly transactions betwee the two dates below.							
Amount to distribute							
\$ 65000							
Start date							
Tue Sep 01 2020			İ				
Number of months							
4			months				
	F	Generate	Cancel				

- 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**.

Transaction Only transactions	s with a	date an	d a valı	ue will be saved.	Generate Tra	nsactio		+ Add T	ransaction
Date				Forecast		Actual	Note	•	
01-Sep-20		G	\$	16250	\$				Ē
01-Oct-20	İ		\$	16250	\$				Ē
01-Nov-20	iii		\$	16250	\$				Ē
01-Dec-20			\$	16250	\$				Ē
			\$						Ē
Total:				\$65,000.00	-	\$0.00			

Advance the project to the next stage

	Project	Manager
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Q Job Aid

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



⁵ 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.

	Microsoft Teams	
Activity	IQ Sensei IQ IQ C	entral About
E Chat	Projects B	Portfolios Proposals
teams	Search	✓ Group By <none> ✓</none>
Calendar		Name \uparrow \vee
د	■ ® ■ <	AA Tenant Renewal R300
	a 🛛 📬 🏟	Annual employee update meeting
Files	a @ 🗰 🏟	Application SaaS Migration
IQ Sensei IQ	🔺 🔋 🤹	Assess the Current Ground Toxicity