

Overview

This Job Aid defines the steps to follow for creating a new project in Sensei IQ.

All new projects should be created in Sensei IQ as opposed to Project for the web. This allows you to capture key high-level information about the project and most importantly define the Project Type.

There are four (4) core actions required for creating a new project. Define the project is a required action, the remaining 3 actions will be based on your project delivery requirements.

1. Define the project
2. Capture key dates
3. Identify deliverables
4. Record the project budget

Define the project



Project Manager



Project IQ – New Blank Project

1. DEFINE THE NEW PROJECT

- a. Ensure you are in **Project IQ**, click **Projects** in the **Leadership** section.
- b. Click **+ New Project** from the command bar.

The screenshot shows the Sensei IQ interface. On the left sidebar, the 'Projects' button is highlighted with a blue circle and labeled 'A'. At the top of the main content area, the '+ New Project' button is highlighted with a blue circle and labeled 'B'. Below the command bar, there is a table titled 'My Active Projects' with columns for Name, Start Date, Finish Date, and Earliest Start Date. The table contains several project entries, including 'Application SaaS Migration', 'Building Renovations', 'Cassowary Mobile App', 'Datacenter Redesign', 'Design and Implement NSP Go-to-Market', 'Eagle Mobile Phone Development', 'Employee Hardware Refresh', and 'Establish Services Division'.

- c. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the project in screens, reports, and dashboards
- d. Provide additional details about the project in the Description field.
- e. Select the **Project Type** based on organizational standards to define the type of project being created.

The screenshot shows the 'New Project' form. At the top, there are 'Save' and 'Save & Close' buttons. Below them is a status bar with 'New Project' and 'Active for less than one mi...' on the left, and 'Planning (< 1 Min)' on the right. The 'Details' section is expanded, showing a 'Summary' box with three fields: 'Name' (with a red asterisk), 'Description', and 'Project Type'. Callout C points to the 'Name' field, D points to the 'Description' field, and E points to the 'Project Type' field.

2. CREATE THE NEW PROJECT

- Select **Save** to create the project and apply the selected project type.

The screenshot shows the 'New Project' form after some data has been entered. The 'Name' field now contains 'Composite track engineering study'. The 'Description' field contains a longer text: 'Comprehensive engineering study to assess the viability of transitioning from all steel to composite tracks, with a focus on wear characteristics during the dry hot summer.' The 'Project Type' dropdown is set to 'Major Project'. Callout A points to the 'Save & Close' button.

3. DEFINE THE PROJECT SPONSOR

- Identify the individual who is the project sponsor as this field is used for filtering views and reports. Select the **Down arrow** in the **header** area.

The screenshot shows the 'Project Manager' field with a dropdown menu. The dropdown is currently set to 'Albert Connell'. Callout A points to the down arrow in the dropdown menu.

- Type the name in the **Project Sponsor** field (following your organization's naming policies) to find and click on their name select the appropriate individual.

The screenshot shows the 'Project Sponsor' field with a search results list. The search term 'conn' is entered in the search bar. The results list shows two options: 'Albert Connell' and 'Connie Campaign'. Callout B points to the search results list.

4. CAPTURE PROJECT DETAILS

- Complete the **Summary** and **Business Case** panes (or the appropriate forms defined by your organization's Project Type).

The screenshot shows the 'Composite track engineering study' project page. The top navigation bar includes 'Save', 'Save & Close', 'New Project', 'Open in Project', 'Refresh', 'Process', 'Share', 'Email a Link', and 'Run Report'. The project status is 'Active' and the project manager is 'Albert Connell'. The project is in the 'Planning' phase, with a progress bar showing 0% completion. The main content area is divided into three panes: 'Summary', 'Business Case', and 'Project Status'. The 'Summary' pane contains fields for Name, Description, Department, Scheduled Finish, Target Finish, Investment Category (Run, Grow, Transform), Location, and Project Type (Major Project). The 'Business Case' pane contains fields for Problem Statement, Business Benefits, Proposal Costs, Financial Benefits, and ROI (0.00). The 'Project Status' pane shows a circular progress indicator at 0% and a list of project tasks: Project, Change Requests, Schedule, Deliverables, Risks, Financials, Issues, and Work.

5. DEFINE THE PROJECT TEAM

- Identify the **team members** by creating a Microsoft365 group specific to the project or associate the project to an existing group based on organizational policies by clicking on **Group Members**.



- Search for and **select the team members** for the project.

The screenshot shows the 'Group Members' interface. It has a 'Group' section with the text 'Add members to create a group. Already have one you are an owner of? Choose an existing group.' Below this are two tabs: 'Create group' and 'Add to a group'. Under 'Create group', there is a dropdown menu showing 'Automated Deployment System' and 'Private'. Below the dropdown is a search bar with the text 'alb'. A list of search results is shown below the search bar, including 'Albert Connell' (IT Manager) and 'Albert Connell' (IT Manager). A callout bubble 'B' points to the 'Albert Connell' (IT Manager) entry.

- Click **Create** to create the new group.

Group

Add members to create a group. Already have one you are an owner of? Choose an existing group.

Create group Add to a group

AS Automated Deployment System Private

Enter a name to add a member

AC Albert Connell IT Manager

Tina Hamilton

C Create

6. LINK THE PROJECT WITH AN EXTERNAL EXECUTION TOOL (IF APPROPRIATE)

- Click **Link a project**.

Link a project

A

- Search for and **select the external project**.

Link a project

Link to an External Project

Browse or use the search to find an external project.

Automated Deployment System

Suggested projects

Automated Deployment System

Automated Sensor System

Automated Test Package Development

Model X Autonomous Vehicle

Thor Auto Billing Software

A

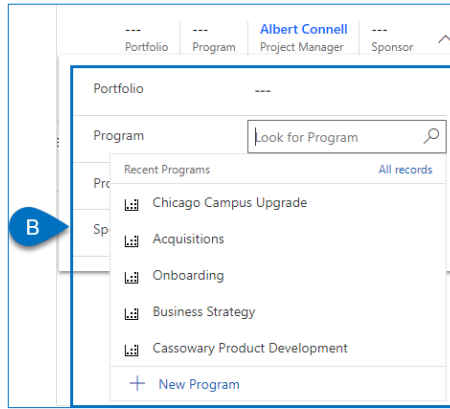
7. ASSOCIATE THE PROJECT WITH A PORTFOLIO OR PROGRAM (IF APPROPRIATE)

- Select the **Down arrow** in the **header** area.

Portfolio Program Albert Connell Project Manager

A

- Select the **Portfolio** or **Program** from the drop-down lists. If required, you can create a new one at this time.



Capture Key Dates



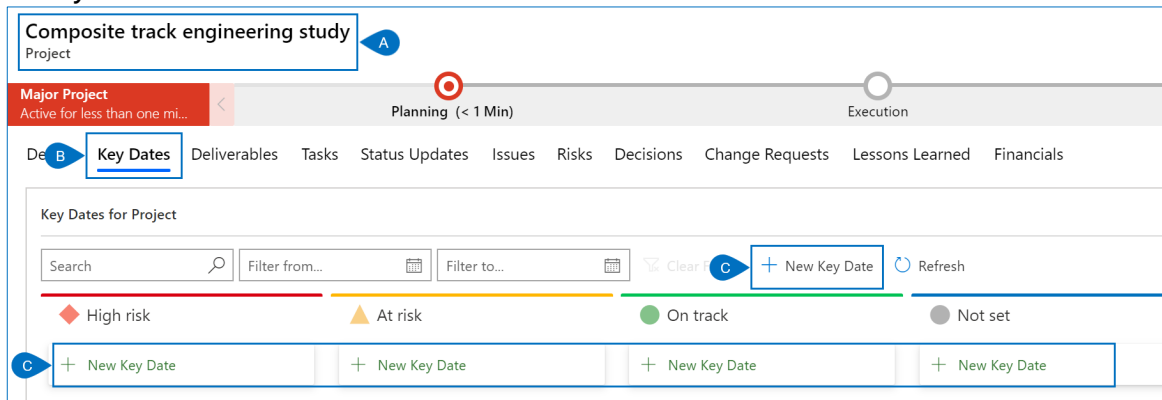
Project Manager



Project IQ – Current Project – Key Dates

1. CAPTURE KEY DATES

- Ensure you have the appropriate project open in **Project IQ**.
- Click the **Key Dates** tab.
- Click **+New Key Date**.



- Complete the **Quick Create Key Date** form and then click **Save and Close** from the bottom.

Quick Create: Key Date

Name

Date

Description

Status

*

Not set

- Set the status by dragging and dropping the **Key Dates** card to the appropriate **Status** column. If you used the **+New Key Date** under the appropriate KPI column this step is not necessary.

Identify Deliverables



Project Manager



Project IQ – Current Project – Deliverables


2. IDENTIFY DELIVERABLES

- Ensure you have the appropriate project open in **Project IQ**.
- Click the **Deliverables** tab.
- Click **+New Deliverable**.

- Complete the **Quick Create Key Date** form and then click **Save and Close** from the bottom.

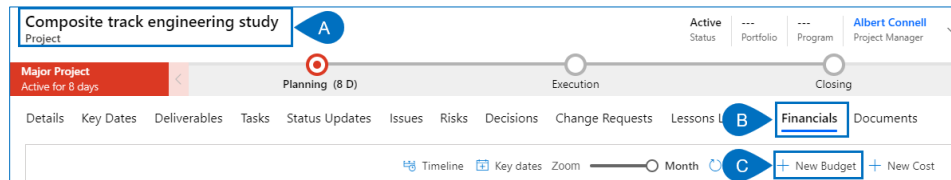
Record the project budget

 Project Manager

 Project IQ – Current Project - Financials

3. CREATE THE PROJECT BUDGET

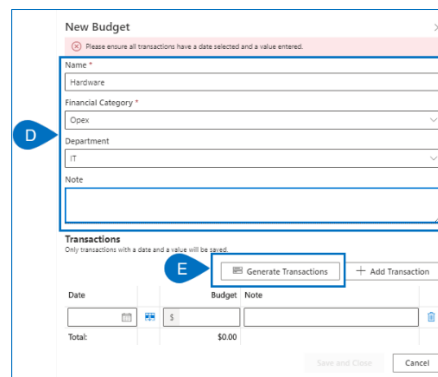
- Ensure you have the appropriate project open in **Project IQ**.
- Click the **Financials** tab.
- Click **+New Budget**.



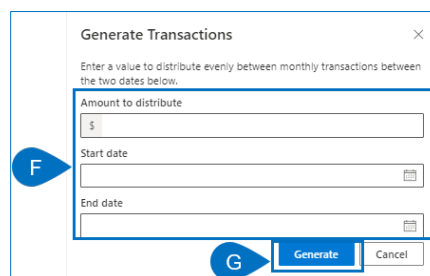
- Complete the **New Budget** form. The **Name** and **Financial Category** fields are mandatory

There are two methods to enter budgets depending on the data you need to enter. Generate Transactions with will allow you to spread a budget amount evenly over a set period of months which can be contoured afterward. Or you can add budget line items individually by entering the data in the transaction lines directly and using +Add Transaction to add additional lines.

- Click the **Generate Transactions** button if you have a set dollar amount that needs to be spread evenly over a number of months.



- Enter the **approved budget amount** and the budget **start** and **end dates**.
- Click **Generate** to have the budget amount spread across the desired dates.



- Edit** any individual monthly budget amount to **contour the budget**.
- Or, Click **+ Add Transaction** to add additional months to the budget. This can also be done without using the Generate option if you have a one time amount to be entered or need to enter varied amounts.

j. Enter the **date** and **amount**.

Transactions
Only transactions with a date and a value will be saved.

Generate + Add Transaction

Date	Budget	Note
1 Jul 2020 H	\$ 10000	
1 Aug 2020 📅	\$ 10000	
1 Sep 2020 📅	\$ 10000	
1 Oct 2020 📅	\$ 10000	
1 Nov 2020 📅	\$ 10000	
📅	\$	
Total:		\$50,000.00

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