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.

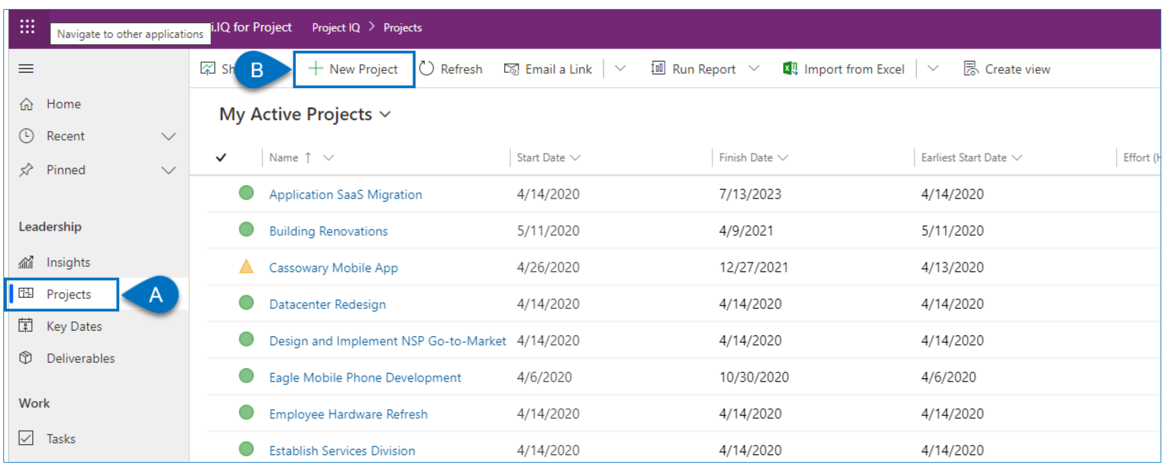
1. Define the project
2. Capture key dates
3. Identify deliverables
4. Record the project budget

Define the project

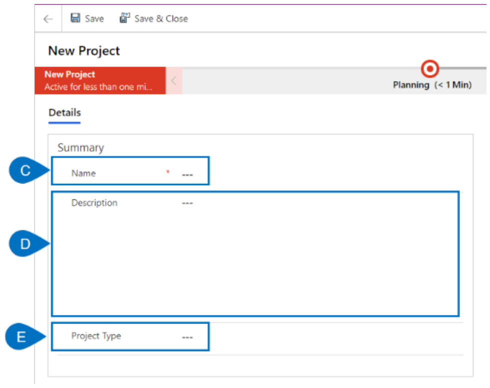
Project Manager **Project IQ – New Blank Project**

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.

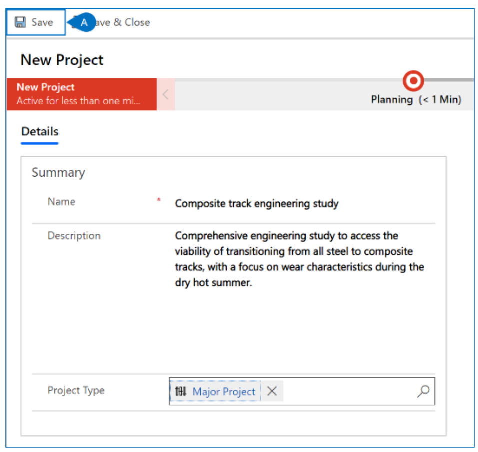


c. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the project in screens, reports, and dashboards
d. Provide additional details about the project in the Description field.
e. Select the **Project Type** based on organizational standards to define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



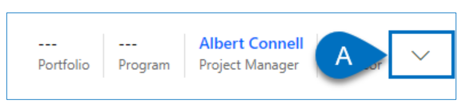
2. CREATE THE NEW PROJECT

a. Select Save to create the project and apply the selected project type.

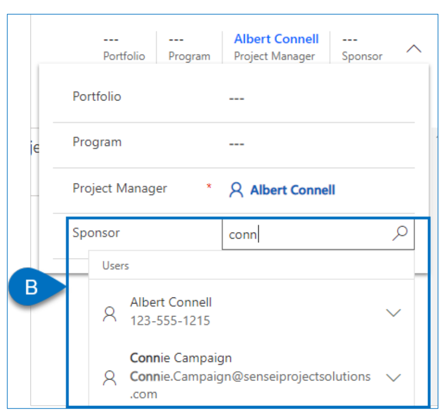


3. DEFINE THE PROJECT SPONSOR

a. 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.

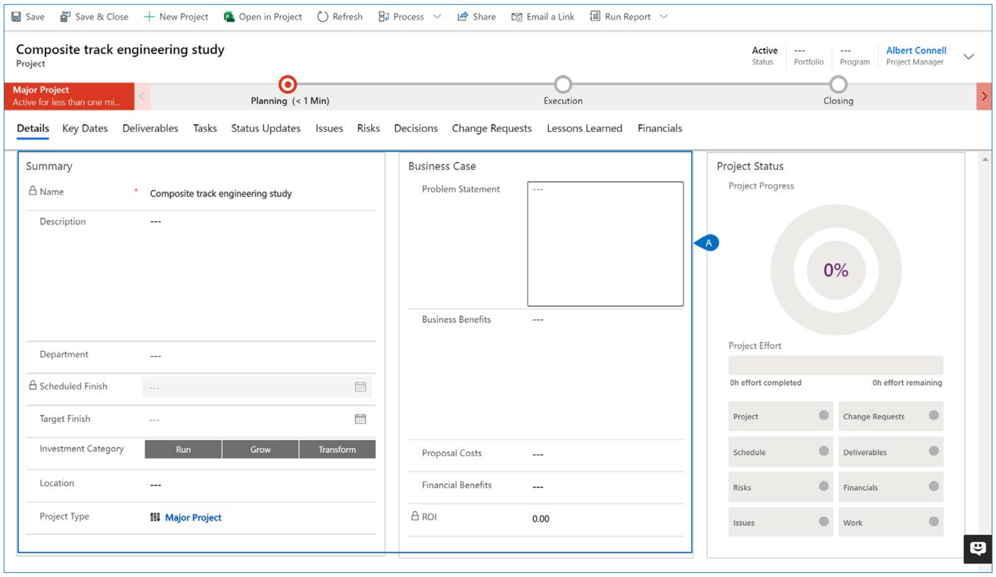


b. Type the name in the **Project Sponsor** field (following your organization's naming policies) to find and click on their name select the appropriate individual.



4. CAPTURE PROJECT DETAILS

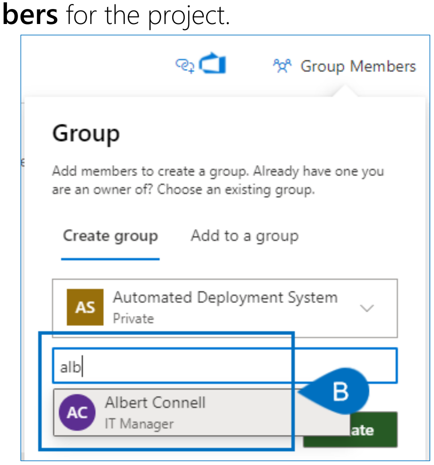
a. Complete the **Summary** and **Business Case** panes (or the appropriate forms defined by your organization's Project Type).



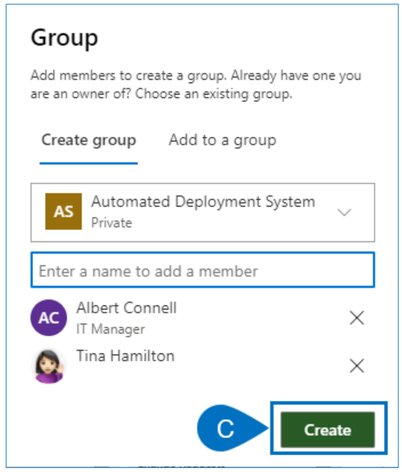
5. DEFINE THE PROJECT TEAM

a. 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**.

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



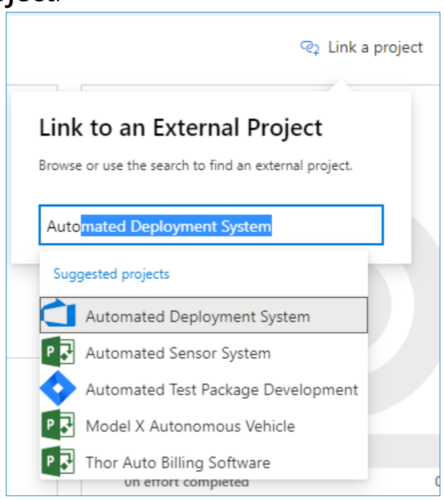
c. Click **Create** to create the new group.



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

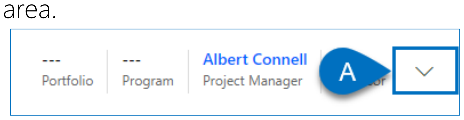
a. Click **Link a project**.

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

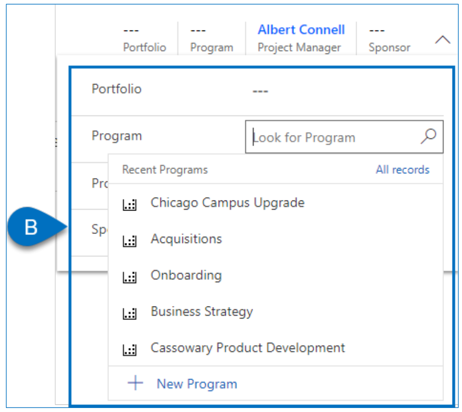


7. ASSOCIATE THE PROJECT WITH A PORTFOLIO OR PROGRAM (IF APPROPRIATE)

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



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

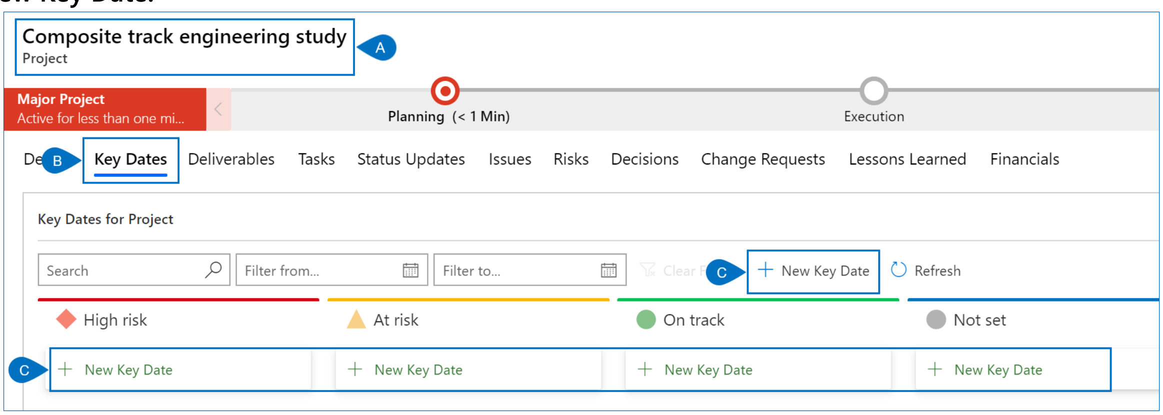


Capture Key Dates

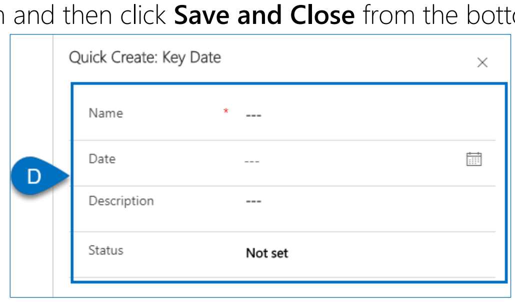
Project Manager — **Project IQ – Current Project – Key Dates**

1. CAPTURE KEY DATES

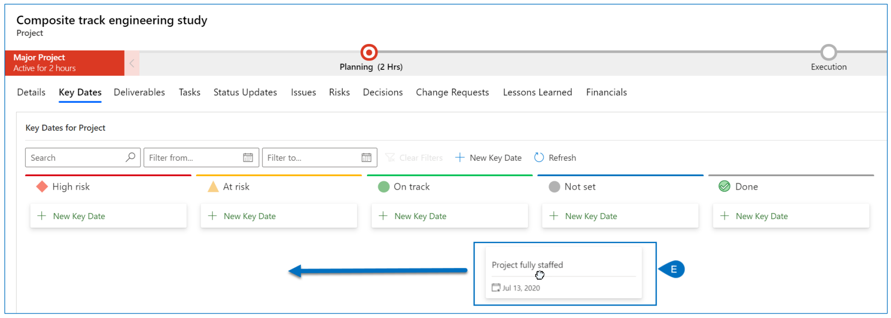
a. Ensure you have the appropriate project open in **Project IQ.**
b. Click the **Key Dates** tab.
c. Click **+New Key Date.**



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



e. 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.

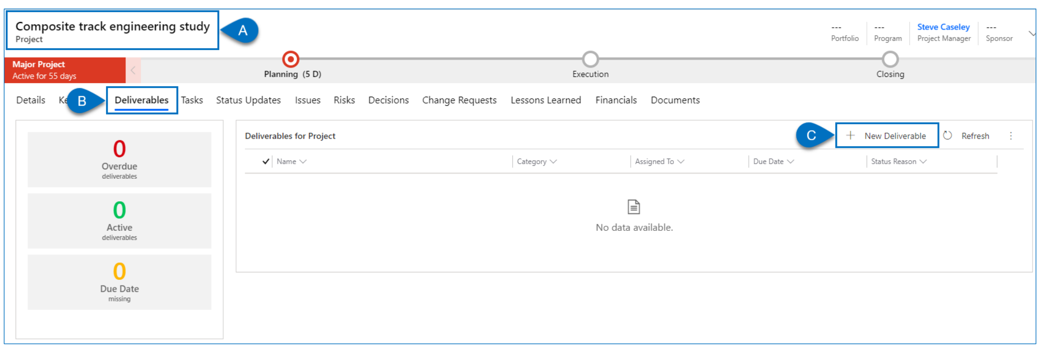


Identify Deliverables

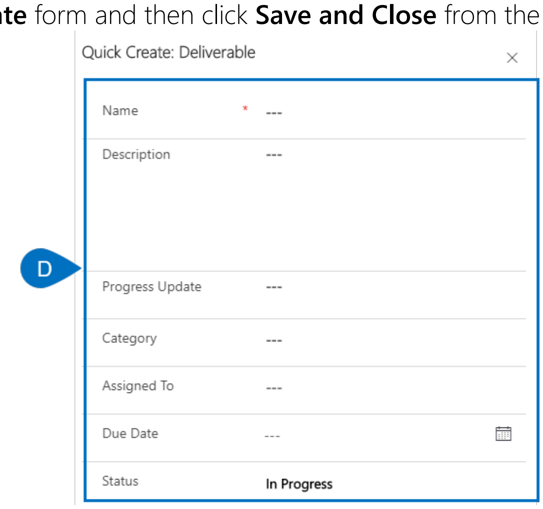
Project Manager **Project IQ – Current Project – Deliverables**

2. IDENTIFY DELIVERABLES

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



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

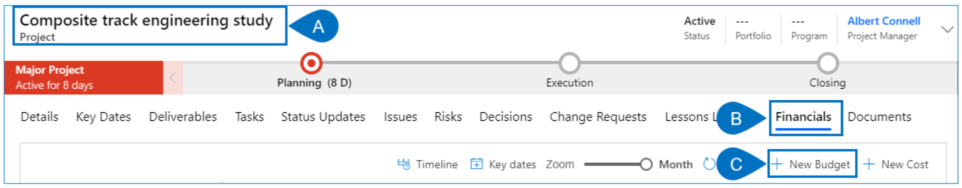


Record the project budget

Project Manager **Project IQ – Current Project - Financials**

3. CREATE THE PROJECT BUDGET

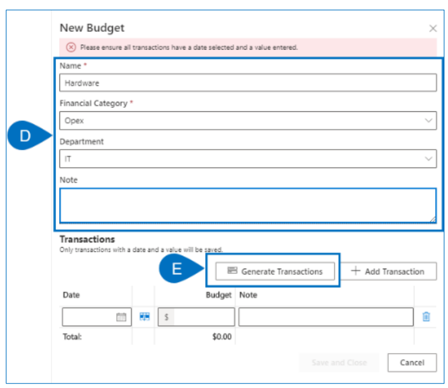
a. Ensure you have the appropriate project open in **Project IQ.**
b. Click the **Financials** tab.
c. Click **+New Budget.**



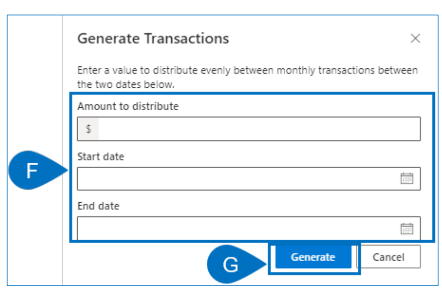
d. Complete the **New Budget** form. The **Name** and **Financial Category** fields are mandatory

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.

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



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



h. **Edit** any individual monthly budget amount to **contour the budget.**
i. 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**.