

# Creating a New Project

 Project IQ

 Project Manager

**Instructions:** Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of **senseiIQ™** in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.





Please note the Job Aid for [Creating a New Project](#) within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

- Lab Exercise 1.** Define the Project
- Lab Exercise 2.** Capture Key Dates
- Lab Exercise 3.** Identify Deliverables
- Lab Exercise 4.** Record the Project Budget


# 1. Define the Project

## Set A - Details

### Summary Section

<b>Name</b>	Employee Hardware Refresh
<b>Description</b>	Provide employees with current technology that will allow seamless mobility.
<b>Department</b>	Select from the list 
<b>Scheduled Finish</b>	Locked field  – will automatically update from the schedule
<b>Target Finish</b>	Select a date from the date picker 
<b>Investment Category</b>	Transform
<b>Location</b>	Sydney NSW
<b>Project Type</b>	Select from the list 

### Business Case Section


<b>Problem Statement</b>	Employee Hardware is obsolete, cumbersome, and tethers employees to their office desks
<b>Business Benefits</b>	Employee efficiency gains; customer retention, increased revenue
<b>Proposal Costs</b>	\$550,000.00
<b>Financial Benefits</b>	\$1,800,000.00
<b>ROI</b>	Locked field  – will automatically calculate once form is saved

### Header Section




<b>Status</b>	Active
<b>Portfolio/Program</b>	Associate the project to a portfolio or a program record if any
<b>Project Manager</b>	Your name as the creator of the new project will appear here by default, you may change if required, however for training purposes retain your name.

## Set B - Details


### Summary Section

<b>Name</b>	Application SaaS Migration
<b>Description</b>	Determine which core applications can be migrated to SaaS and migrate each in a phased approach.
<b>Department</b>	Select from the list 

## Set A - Details

<b>Scheduled Finish</b>	Locked field  – will automatically update from the schedule
<b>Target Finish</b>	Select a date from the date picker 
<b>Investment Category</b>	Run
<b>Location</b>	Melbourne Vic
<b>Project Type</b>	Select from the list 

## Business Case Section

<b>Problem Statement</b>	All our core applications are currently hosted on-prem. This requires a large data center and a significant expense budget to maintain it. In addition, 80% of our core applications are several versions behind with some no longer supported.
<b>Business Benefits</b>	Reduced datacentre footprint; reduced expense budget; reduced hours spent on support allowing the technical team to focus on projects; guarantee to keep applications up-to-date going forward; improved end user efficiency with newer features and functionality; decommissioning of workaround solutions that had become permanent
<b>Proposal Costs</b>	\$1,800,000.00
<b>Financial Benefits</b>	\$5,000,000.00
<b>ROI</b>	Locked field  – will automatically calculate once form is saved


## Header Section


<b>Status</b>	Active
<b>Portfolio/Program</b>	Associate the project to a portfolio or a program record, if any
<b>Project Manager</b>	Your name as the creator of the new project will appear here by default, you may change if required, however for training purposes retain your name.




## 2. Capture Key Dates


### Set A


Name	Currency Exchange Capability Available
Date	Select a date from the date picker 
Description	The ability to accept foreign currency seamlessly in our sales application
Status	◆ High Risk


Name	Financial True-up
Date	Select a date from the date picker 
Description	Semi-annual financial review and reallocation of portfolio finances
Status	◆ High Risk

Name	Improved Employee Morales
Date	Select a date from the date picker 
Description	Measurable improvement to employee morale
Status	▲ At Risk

### Set B

Name	Employee Survey
Date	Select a date from the date picker 
Description	Initial draft of employee survey of new projects
Status	▲ At Risk

Name	Realized Revenue
Date	Select a date from the date picker 
Description	Forecasted revenue from the Driver Awareness Program realized
Status	▲ At Risk

Name	Quarterly Revenue Review
Date	Select a date from the date picker 
Description	Review ROI across the portfolio





Status



● Not Set





### 3. Identify Deliverables

#### Set A

Name	Vendor Onboarding Packet
Description	Complete packet of forms, agreements, policies, and procedures
Category	Process Optimization
Assigned To	Select your name or another user from the list 
Due Date	Select a date from the date picker 
Status	In Progress
Progress Update	The materials for the packet are in progress



Name	Office Furniture Installed
Description	All office furniture and equipment installed at Chicago Campus
Category	Other
Assigned To	Select your name or another user from the list 
Due Date	Select a date from the date picker 
Status	In Progress
Progress Update	Vendor assures us that that the furniture will be delivered on time



Name	Swag Bag
Description	Vendors are contributing items to give to our employees
Category	Cost Savings
Assigned To	Select your name or another user from the list 
Due Date	Select a date from the date picker 
Status	In Progress
Progress Update	We have finalized our vendor list and sent initial requests



#### Set B

Name	Mobile App Requirements Document
Description	Maintain a document of the requirements for audit purposes





Category	Process Optimization
Assigned To	Select your name or another user from the list 
Due Date	Select a date from the date picker 
Status	In Progress
Progress Update	We are just beginning the process



Name	Meeting Handouts
Description	A packet consisting of the meeting schedule, session agendas, and other event details
Category	Other
Assigned To	Select your name or another user from the list 
Due Date	Select a date from the date picker 
Status	Completed
Progress Update	Meeting hand-outs have been printed and distributed

Name	Analysis Report of the Current HW, SW, and Comm
Description	Complete analysis to determine what new features will be required
Category	Process Optimization
Assigned To	Select your name or another user from the list 
Due Date	Select a date from the date picker 
Status	In Progress
Progress Update	Expect to begin as planned in project



## 4. Record the Project Budget


### Set A

Name	Hardware Budget
Financial Category	Select from the list 
Amount to Distribute	\$900,000,000
Start Date	Select a date from the date picker 
Number of Months	12

Name	Labor Budget
Financial Category	Select from the list 
Amount to Distribute	\$850,000
Start Date	Select a date from the date picker 
Number of Months	12

### Set B


Name	Software Budget
Financial Category	Select from the list 
Amount to Distribute	\$900,000,000
Start Date	Select a date from the date picker 
Number of Months	12

Name	Travel Budget
Financial Category	Select from the list 
Amount to Distribute	\$850,000





Start Date

Select a date from the date picker 

Number of  
Months

12