

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. This allows you to capture key high-level information about the project and most importantly define the Project Type.

There are six (6) core actions required for creating a new project. Define the project is a required action, the remaining actions will be based on your project delivery requirements.

- 1. Define the project
- 2. Build project from an existing schedule or template
- 3. Capture key dates
- 4. Identify deliverables
- 5. Create resource requests
- 6. Record the project budget

Define the project

Project Manager

³ 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.

	Navigate to other applica	tions i.IQ for P	roject Project IQ > Projects			
=		🖾 SH 🖪	+ New Project 🖒 Refresh 🛛	🗐 Email a Link 🛛 🗸 🗐 Run Re	eport \vee 🛛 💐 Import from Excel	✓
ഹ	Home	My A	ctive Projects ~			
Ŀ	Recent 🗸	· · ·	,			
\$	Pinned 🗸	~	Name ↑ ∨	Start Date 🗸	Finish Date \lor	Earliest Start Date V Effort (H
		•	Application SaaS Migration	4/14/2020	7/13/2023	4/14/2020
Lead	dership	•	Building Renovations	5/11/2020	4/9/2021	5/11/2020
411Î	Insights		Cassowary Mobile App	4/26/2020	12/27/2021	4/13/2020
Ē	Projects A	•	Datacenter Redesign	4/14/2020	4/14/2020	4/14/2020
Ţ,	Key Dates		Design and Implement NSP Go-to-Market	4/14/2020	4/14/2020	4/14/2020
٢	Deliverables		sesginate implement hor do to market	1.1.2020		
			Eagle Mobile Phone Development	4/6/2020	10/30/2020	4/6/2020
Wor	'k	•	Employee Hardware Refresh	4/14/2020	4/14/2020	4/14/2020
\checkmark	Tasks		Establish Services Division	4/14/2020	4/14/2020	4/14/2020

- 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.
- f. Select the **Project Schedule** and **External Project** (if appropriate)





- g. If the external project is **Planner**, **Create a new group** or **select an Existing Microsoft 365 group** for the project. If you use an **existing M365 group** you can link to an **existing Planner plan or create a new one**.
- h. Add team members to the M365 group.
- i. Enter a name for the Planner Plan (defaults to the IQ Project Name)
- j. Define whether the same M365 group should own both the IQ Project and Planner plan.

New Project			62	×
Name *				
New Project				
Project Type				
				\sim
Description				
Project Schedule				/
Planner				\sim
Microsoft O365 Group*				
New group Existing group				
NP New Project Private				~
Enter a name to add a member				
Steve Caseley Group Owner				
Please enter a name for your Planner plan *				
New Project				
Would you like the same Group to own your	Project i	n Sensei IQ	*	
Please select				
		Country	6	

2. CREATE THE NEW PROJECT

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



🔚 Save 🔨 ave & Close	
New Project	
New Project Active for less than one mi	< Planning (< 1 Min)
Details	
Summary	
Name	* Composite track engineering study
Description	Comprehensive engineering study to access the viability of transitioning from all steel to composite tracks, with a focus on wear characteristics during the dry hot summer.
Project Type	HI Major Project X

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.

	 Portfolio Program	Albert Connell Project Manager Sponsor			
	Portfolio				
je	Program				
	Project Manager *	Albert Connell			
	Sponsor	conn , P			
	Users	_			
В	Albert Connell Albert Connell	~			
	Connie Campa A Connie.Campa .com	ign ign@senseiprojectsolutions ∨			

4. CAPTURE PROJECT DETAILS

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

omposite track eng	gineering study				Active Status Po	ortfolio Prog	gram Project Ma	onnell inager V
jor Project ive for less than one mi	< Planning (< 1 Min)			Execution		Closing		
etails Key Dates De	liverables Tasks Status Updates Issu	ues Risks	Decisions Change Reque	sts Lessons Learned Fir	nancials			
Summary	* Composite track engineering study		Business Case Problem Statement	***	Project Status Project Progress			
Description								
						0%		
			Business Benefits		_			
Department					Project Effort			
A Scheduled Finish					0h effort completed	1	0h effort rema	sining
Target Finish		Ē			Project	Cha	ange Requests	•
Investment Category	Run Grow Tra	nsform	Proposal Costs		Schedule	Del	liverables	•
Location			Financial Benefits		Risks	Final	ancials	•
			A no.					

5. DEFINE THE PROJECT TEAM

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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. If you have synced the project with a Planner Plan, the group has already been defined, but you should still ensure all team members are included in the group.



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

eş 📥 🦘	Group Members
Group	
Add members to create a group. Alrea are an owner of? Choose an existing gr	dy have one you oup.
Create group Add to a grou	ıp
AS Automated Deployment Private	System 🗸
alb	
Albert Connell IT Manager	Bate

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





- 6. LINK THE PROJECT WITH AN EXTERNAL EXECUTION TOOL (IF APPROPRIATE AND NOT ALREADY DONE AS PART OF NEW PROJECT)
- 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.





Build project from template

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Project IQ – Current Project - Tasks

- 1. LINK THE PROJECT TO AN EXTERNAL EXECUTION TOOL (IF NOT ALREADY DONE IN DEFINE THE PROJECT SECTION)
- a. Ensure you have the appropriate project open in **Project IQ.**
- b. Ensure you are on the **Information Grouping** tab.
- c. Click Link a project.

Ľ	, ejee	••										
	2021 E Project	mployee S	atisfac	tion Surve B	ev - Saved	A		Steve Caseley Project Manager	Active Status	Portfolio	Program	~
	Major Pro Active for 2	ject 23 days	<		Planning (23 D))	Executio	'n		Closin	g	>
	Details	Key Dates	Tasks	Financials	Tracking	Resources	Strategy	C 😪 Lir	nk a projec	t ^A X ^A	Group Mem	bers

d. Search for and **select the appropriate project**. (As Planner plans do not support many of the standard date, effort, duration and dependency principles, **Planner plans should not be used**)



2. REMOVE EXTERNAL TOOL LINK BUT KEEP TASKS

a. Ensure you've waited at least five minutes to ensure all the tasks from the execution tool have synced to your new project, **select the link icon** to the immediate left of the external tool icon.



b. Select the X to remove the link.



- c. Ensure Leave tasks in place is selected.
- d. Click Accept.



3. ADD TASK DEPENDENCIES

a. Add **appropriate dependencies** by clicking and dragging from the **ending circle on the predecessor task** to the **beginning circle of the successor task**.

		Nov	07, 2	2021					Nov	/ 14, 3	2021		
5	6	7	8	9	10	11	12	13	14	15	16	17	18
denti	fy wor	kshop	parti	cipant	s	0%							ŀ.
	Se	hedu	A		s 🌑	10%							

- 4. REPLACE EXTERNAL RESOURCES WITH NAMED RESOURCES
- a. Right mouse click on the task you need to replace the resource.
- b. Select Task Information



- c. Go to the Resources tab
- d. Click New Resource Assignment



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Project Kickoff - Unsaved Project Task		
C Resources Dependencies Child T	ks	
		D + New Resource Assign
\checkmark Resource \checkmark	Units \vee	Is External \vee
Albert Connell (Project for the Web)		Yes

e. Search for and select the new enterprise resource.

Quick Create:	Resource Assignment	×
Resource		<u>م</u>
Unit	Bookable Resources	
	Albert Connell	

- f. Select the external tool synchronized resource.
- g. Click Delete Resource Assignment.



Capture Key Dates

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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.

l ajor Project ctive for less than one mi	<	Planning (< 1 Min)	Execution	
De B Key Dates De	liverables Tas	ks Status Updates Issues F	isks Decisions Change Requests Lessons Learned Financials	
Key Dates for Project				
Key Dates for Project	P Filter from	Filter to	🛅 🈨 Clear i 💽 🕂 New Key Date 💍 Refresh	

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

(Quick Create: Key Date		×				
	Name *	×					
D	Date						
	Description						
	Status	Not set					

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.

Composite track engineering stu Project	dy	•		0
Major Project Active for 2 hours	Planni	og (2 Hrs)		Execution
Details Key Dates Deliverables Tas	s Status Updates Issues Risks	Decisions Change Requests Lessor	ns Learned Financials	
Key Dates for Project				
Search \mathcal{P} Filter from	Filter to	📰 🐨 Clear Filters 🕂 New Key Date	🖒 Refresh	
🔶 High risk	🔺 At risk	On track	Not set	🕘 Done
+ New Key Date	+ New Key Date	+ New Key Date	+ New Key Date	+ New Key Date
		Project ful	lly staffed O 020	

Identify Deliverables

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Project IQ – Current Project – Deliverables

1. IDENTIFY DELIVERABLES

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



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Composite track engineering study Project			Portfolio Program Project Manager Sponsor
Major Project Active for 55 days	Planning (5 D)	Execution	Closing
Details K	Status Updates Issues Risks Decisions	Change Requests Lessons Learned Financials Doci	uments
0	Deliverables for Project		C + New Deliverable O Refresh :
Overdue	✓ Name ∽	Category \sim Assigned T	o ∨ Due Date ∨ Status Reason ∨
0		Ð	
Active		No data available	
0			
Due Date missing			

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

(Quick Create: Delivera	ble	×
	Name	*	
	Description		
	Progress Update		
	Category		
	Assigned To		
	Due Date		i
	Status	In Progress	

Create Resource Requests

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Project IQ – Current Project – Resource Plan

1. CREATE GENERIC RESOURCE REQUESTS

- a. Ensure you have the appropriate project open in Project IQ.
- b. Ensure you are on the **Resources Grouping** tab and select **Resource Plan**.
- c. Use the **Select a Resource** to add search box and **find the generic resource** you want to request for the new project.





2. DEFINE GENERIC RESOURCE REQUIREMENTS

a. Enter the number of hours requested per displayed time period for each generic resource.

	1	Visible Pe	riod Total ←		February 202	1		March 2021	1		April 2021		Î	May 2021
Requests by Primary Role		P	с	Ρ	С	Α	P	с	A	Ρ	С	Α	Р	С
Totals		325.0	0.0			0.0	125.0		0.0	125.0		0.0	75.0	
^ Project Manager		325.0	0.0			0.0	125.0		0.0	125.0		0.0	75.0	
Generic	00	325.0				A	125			125			75	

3. SUBMIT RESOURCE REQUESTS FOR REVIEW AND APPROVAL

a. Once all requests have been defined, click Submit and Save to submit the resource requests.

Record the project budget

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Project IQ – Current Project - Financials

1. CREATE THE PROJECT BUDGET

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

Comp Project	osite track	engineering	ı study	A					Active Status	 Portfolio	Program	Albert Connell Project Manager	\sim
Major Pro Active for	oject 8 days	<		Planning (8 D)				Execution			Closir	ng	
Details	Key Dates	Deliverables	Tasks	Status Updates	Issues	Risks	Decisions	Change Requests	Lessons L	B	inancials	Documents	
					Hi Ti	meline	🗄 Key dates	Zoom ———————————————————————————————————	Month 🕐	C H	New Budg	get + New Cos	t

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.



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

	New Budget			×
	Please ensure all trans	actions have a date selected	d and a value entered.	
	Name *			
	Hardware			
	Financial Category *			
	Opex			
D	Department			
	IT			~
	Note			
	Transactions			
	Only transactions with a date a	nd a value will be saved.		1
			B Generate Transactions	+ Add Transaction
	Date	Budget	Note	
		3		
	Total	\$0.00		
				d Close Cancel

- 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.

Amount to distribute	
Start date	
End date	mcel

- 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**.

