Overview

This Job Aid defines the steps to follow for collaborating on project artifacts, such as issues, risks, decisions, changes, lessons learned, and documents, in the platform.

Based on organisational policies and your project's specific requirements, you may not use all these project artifacts on your project.

There are six (6) collaboration components available to help you deliver your projects, and each is addressed here.

1. Manage project issues.
2. Manage project risks.
3. Track project decisions.
4. Record and manage change requests.
5. Capture lessons learned.
6. Manage project documents.

Except for managing project documents, the other 5 functions are in a similar fashion and if you are comfortable with one, you may not need to review the other components of this document.

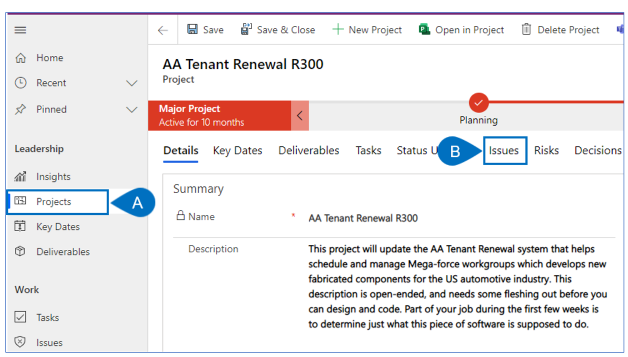
Manage project issues

Project Manager | Projects – Issues tab

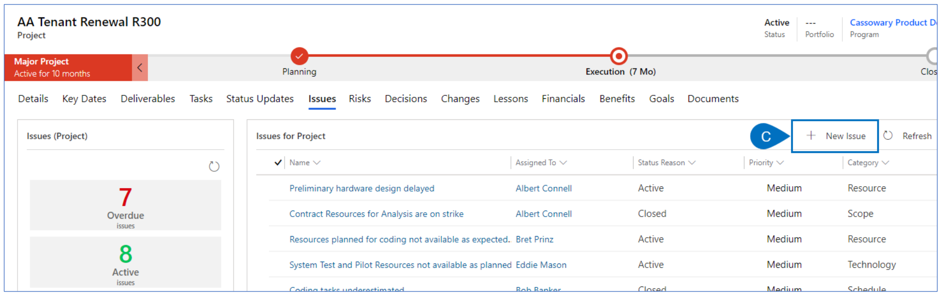
1. CREATE AN ISSUE

a. Ensure you have the appropriate project open in **Projects**.

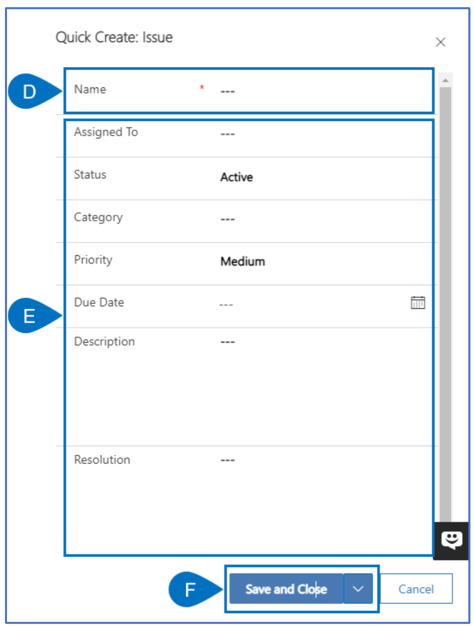
b. Click the **Issues** tab.



c. Click **+ New Issue**.

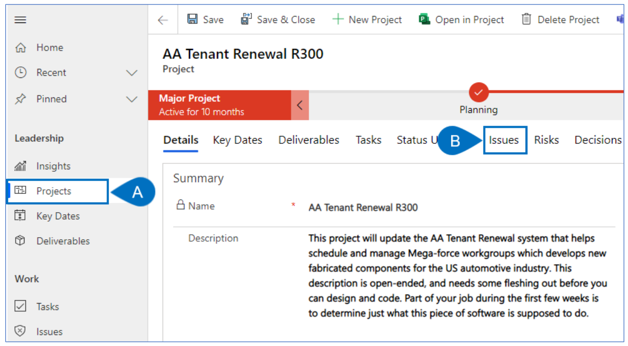


d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the issue in screens, reports, and dashboards.
e. Provide additional details in the remaining fields.
f. Click **Save and Close**.

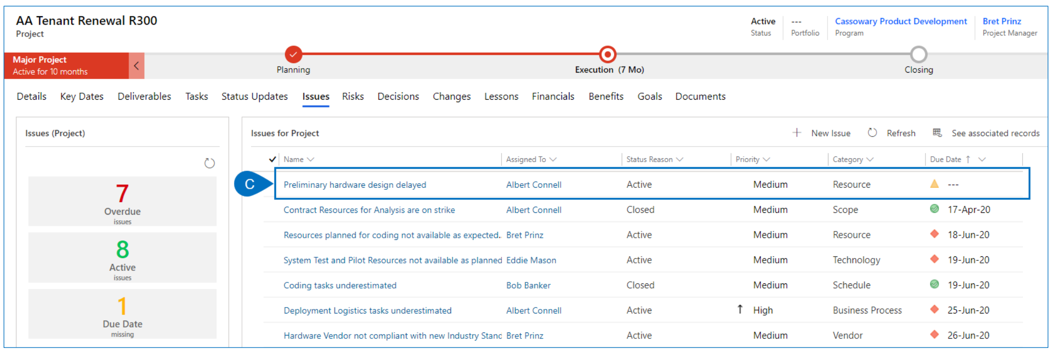


2. UPDATE ISSUES

a. Ensure you have the appropriate project open in **Projects**.
b. Click the **Issues** tab.

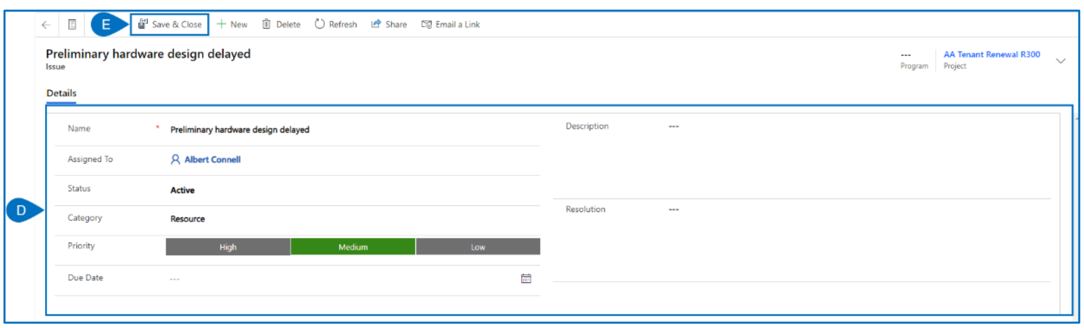


c. Click on the **Issue** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



Manage project risks

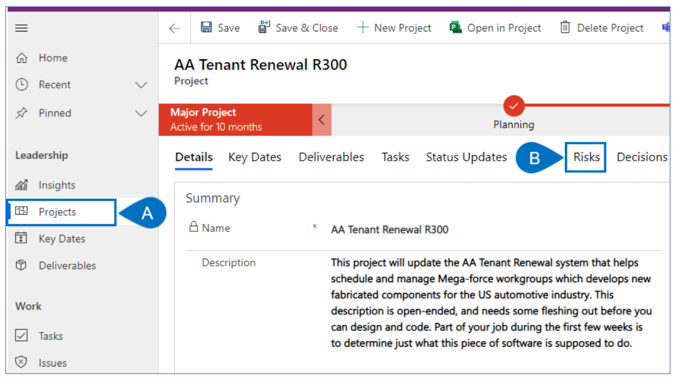
Project Manager

Projects – Risks tab

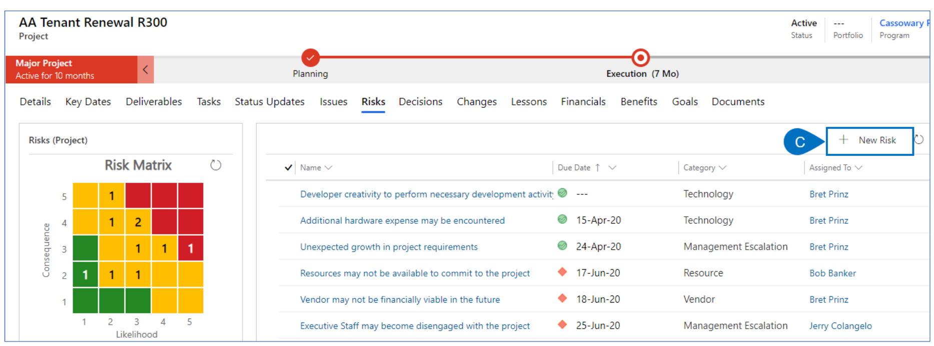
1. CREATE A RISK

a. Ensure you have the appropriate project open in **Projects.**

b. Click the **Risks** tab.



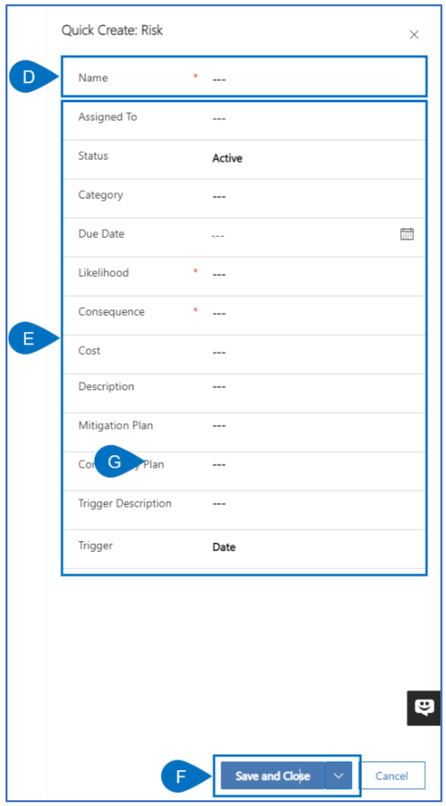
c. Click **+ New Risk.**



d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the risk in screens, reports, and dashboards.

e. Provide additional details in the remaining fields.

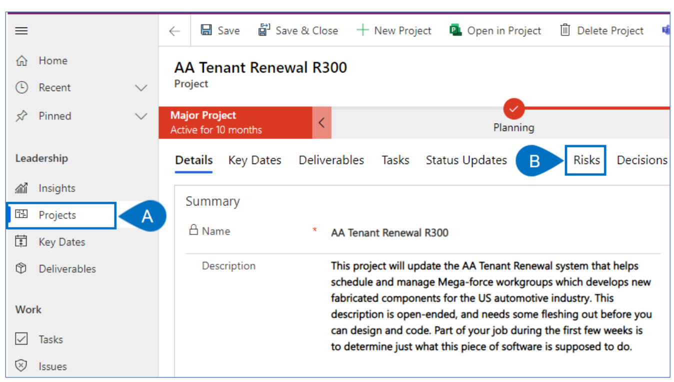
f. Click **Save and Close.**



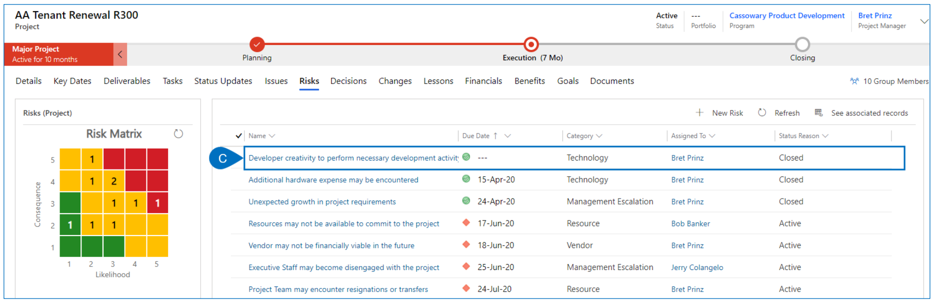
2. UPDATE RISKS

a. Ensure you have the appropriate project open in **Projects**.

b. Click the **Risks** tab.

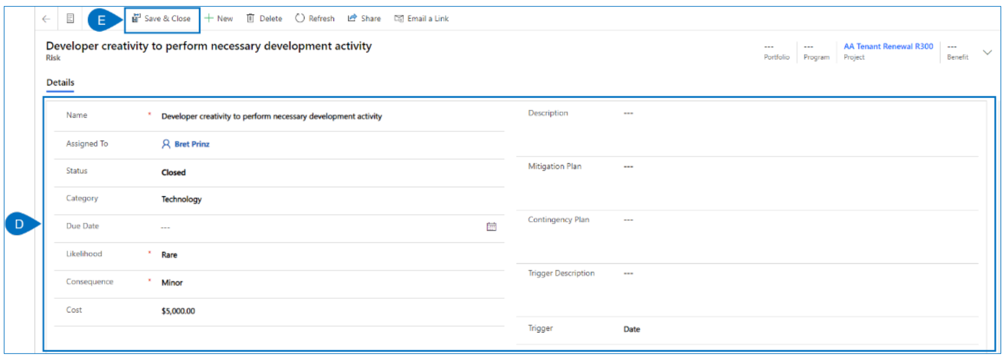


c. Click on the **Risk** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close.**



Track project decisions

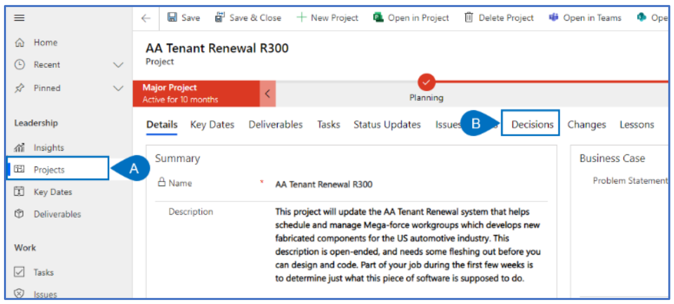
Project Manager

Projects – Decisions tab

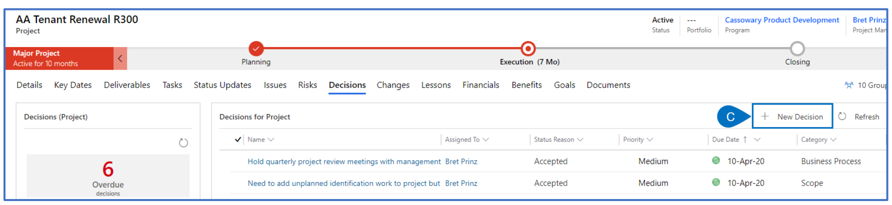
1. CREATE A DECISION

a. Ensure you have the appropriate project open in **Projects.**

b. Click the **Decisions** tab.



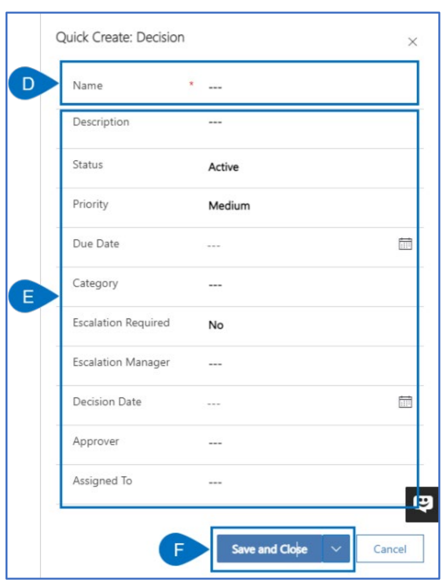
c. Click **+ New Decision.**



d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the decision in screens, reports, and dashboards.

e. Provide additional details in the remaining fields.

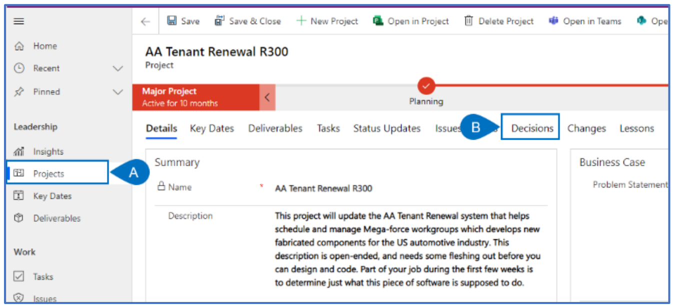
f. Click **Save and Close.**



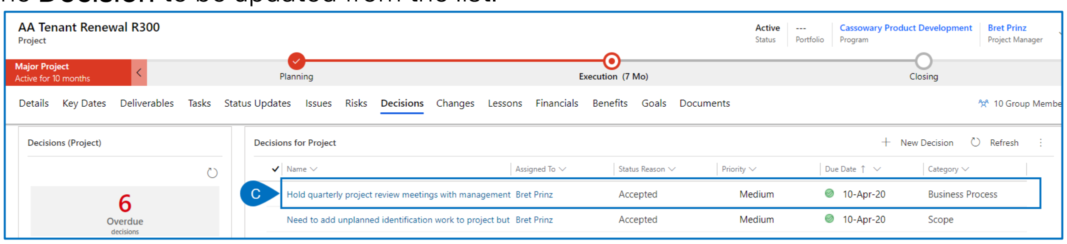
2. UPDATE DECISIONS

a. Ensure you have the appropriate project open in **Projects**.

b. Click the **Decisions** tab.

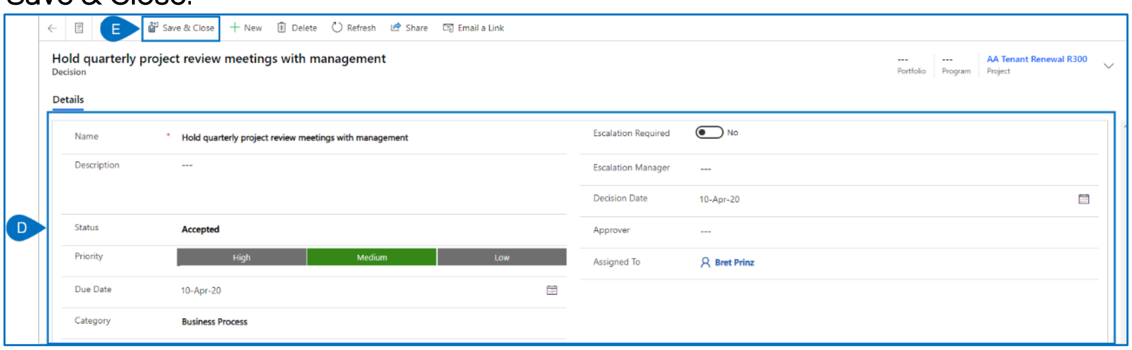


c. Click on the **Decision** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



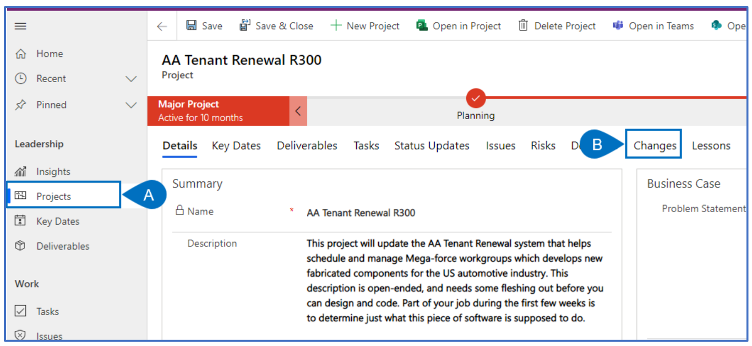
Record and manage change requests

Project Manager Projects – Changes tab

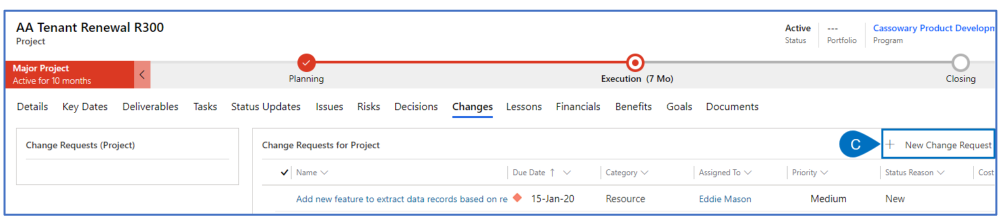
1. CREATE NEW CHANGE REQUEST

a. Ensure you have the appropriate project open in **Projects.**

b. Click the **Changes** tab.



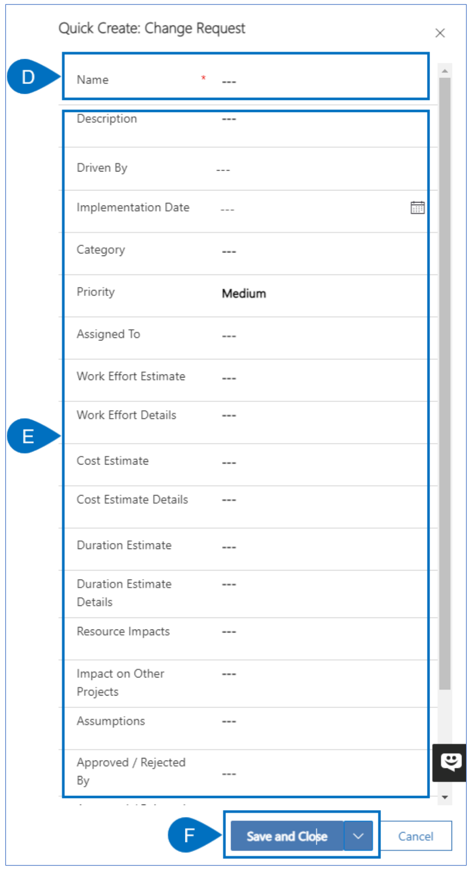
c. Click **+ New Change Request.**



d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the Change Request in screens, reports, and dashboards.

e. Provide additional details in the remaining fields.

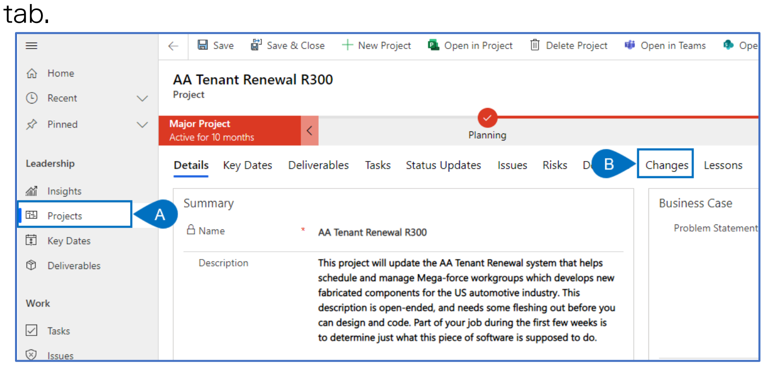
f. Click **Save and Close.**



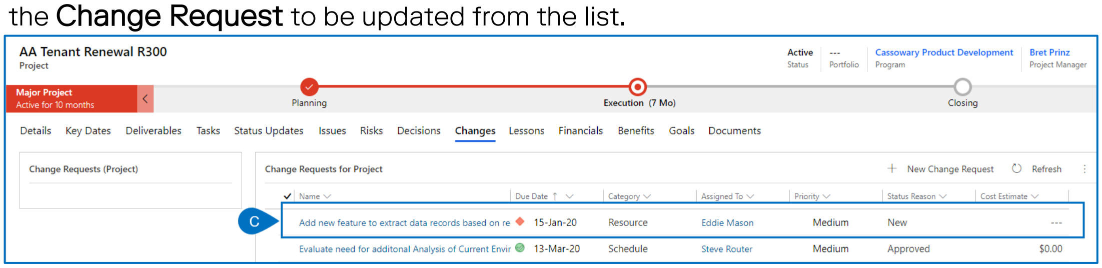
2. UPDATE CHANGE REQUESTS

a. Ensure you have the appropriate project open in **Projects**.

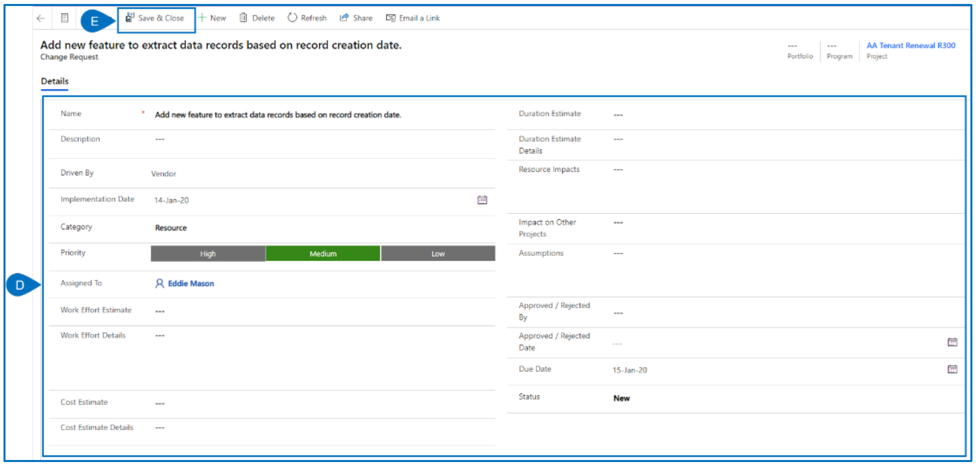
b. Click the **Changes** tab.



c. Click on the **Change Request** to be updated from the list.



d. Update any field, as required.
e. Click **Save & Close**.



Capture lessons learned

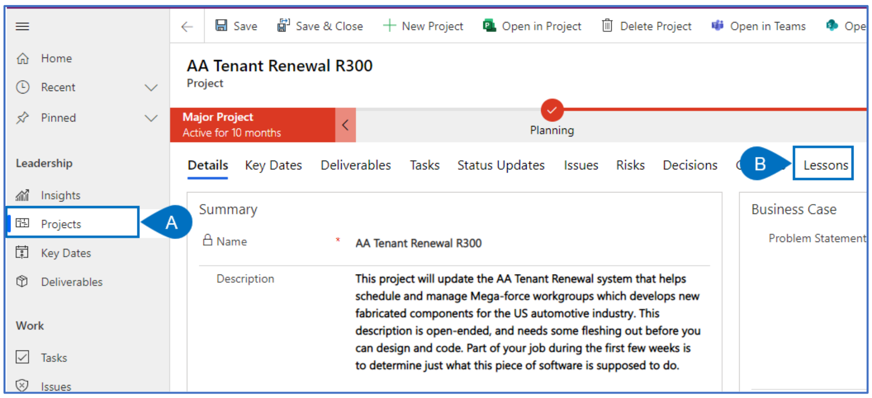
Project Manager

Projects – Lessons tab

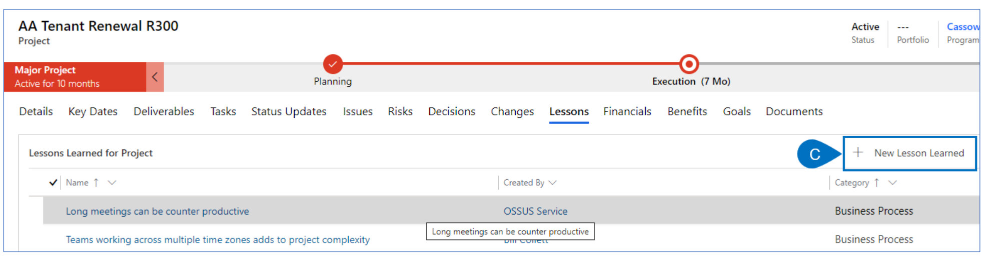
1. CREATE NEW LESSON LEARNED

a. Ensure you have the appropriate project open in **Projects.**

b. Click the **Lessons** tab.



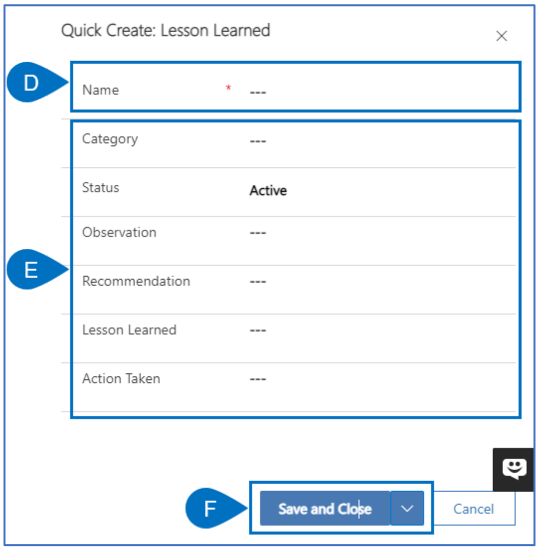
c. Click **+ New Lesson Learned.**



d. Fill in the Name field. It is mandatory and it should be clear and concise to help users identify the Lesson Learned in screens, reports, and dashboards.

e. Provide additional details in the remaining fields.

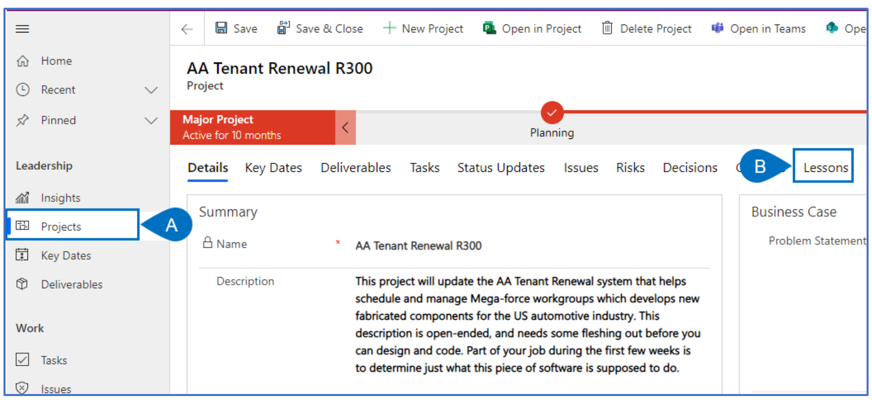
f. Click **Save and Close.**



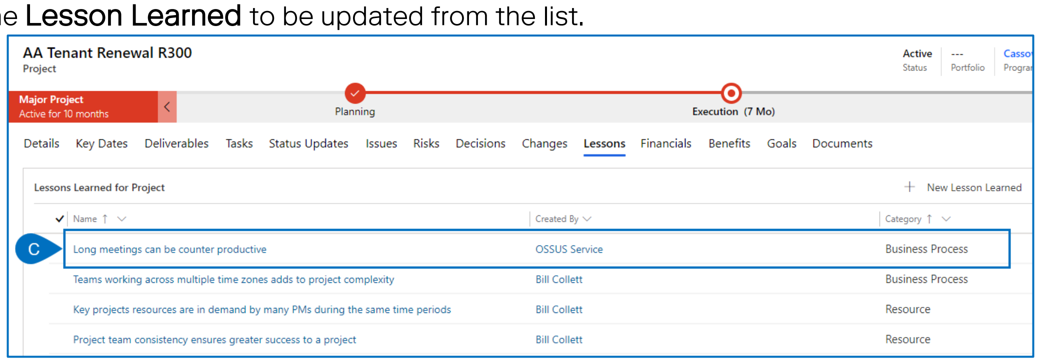
2. UPDATE LESSONS LEARNED

a. Ensure you have the appropriate project open in **Projects**.

b. Click the **Lessons** tab.

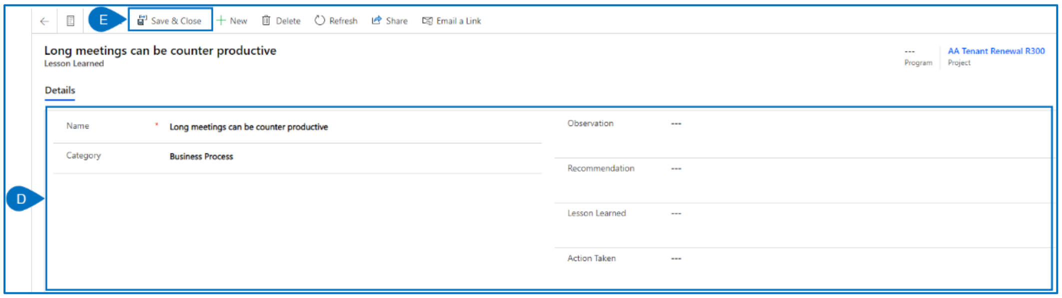


c. Click on the **Lesson Learned** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.


E
Save & Close
New
Delete
Refresh
Share
Email a Link
Long meetings can be counter productive
Lesson Learned
Program
AA Tenant Renewal R300
Project
Details
D
Name
Long meetings can be counter productive
Category
Business Process
Observation
Recommendation
Lesson Learned
Action Taken

Manage project documents

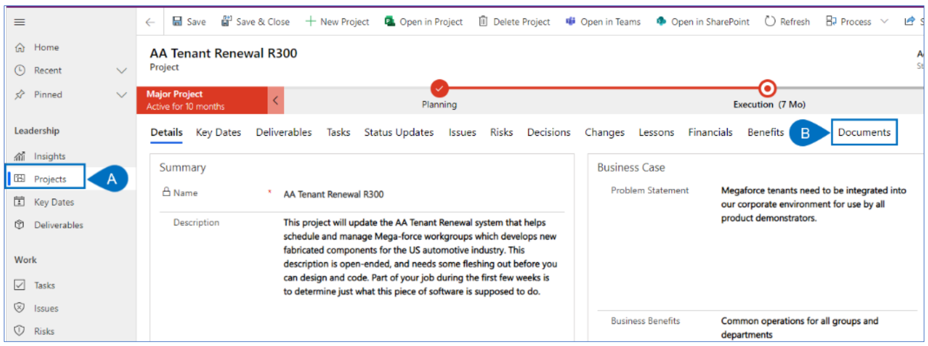
Project Manager

Projects – Documents tab

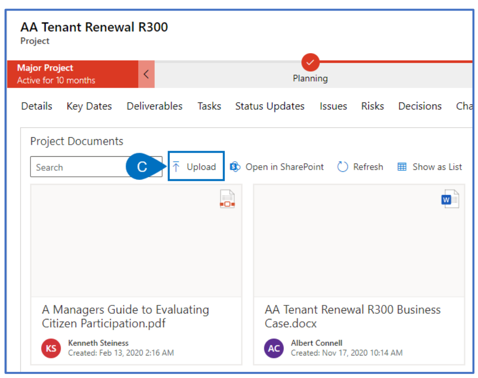
1. UPLOAD NEW DOCUMENTS

a. Ensure you have the appropriate project open in **Projects**.

b. Click the **Documents** tab.

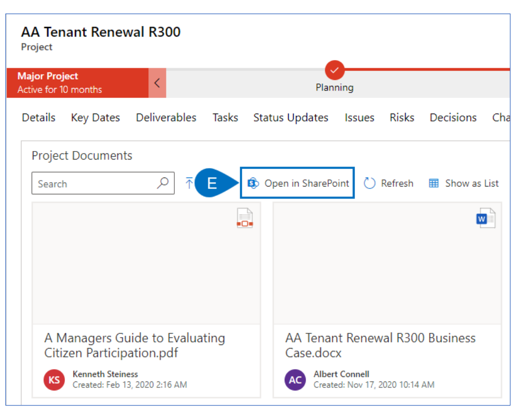


c. Click **+ Upload**.



d. **Browse and select** the new document to be added to the project repository.

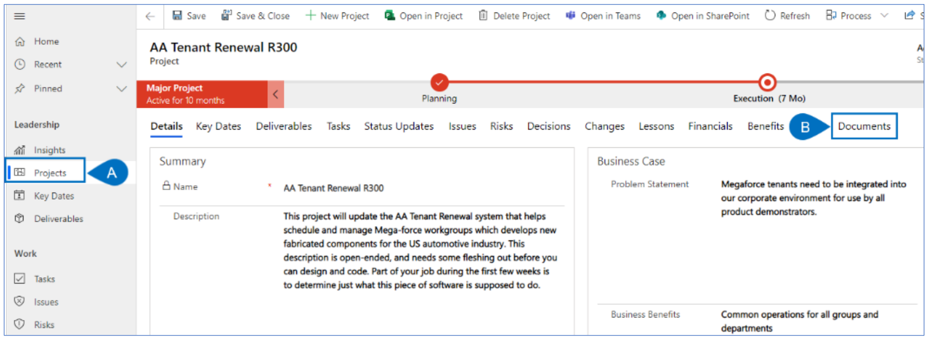
e. Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.



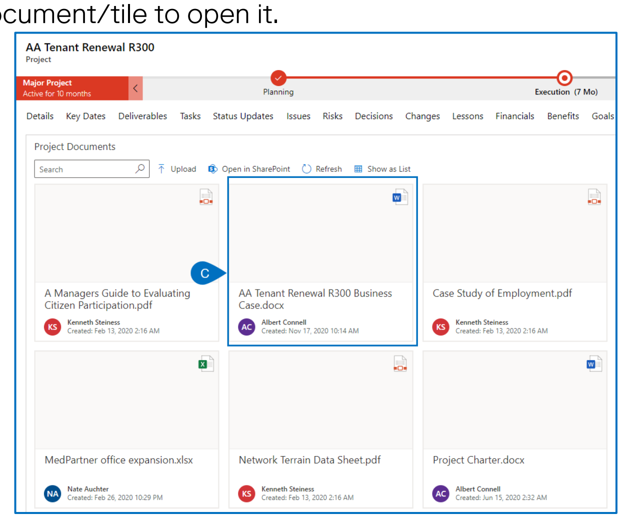
2. VIEW OR UPDATE EXISTING DOCUMENTS

a. Ensure you have the appropriate project open in **Projects**.

b. Click the **Documents** tab.



c. Click on the appropriate document/tile to open it.



d. Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.