

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



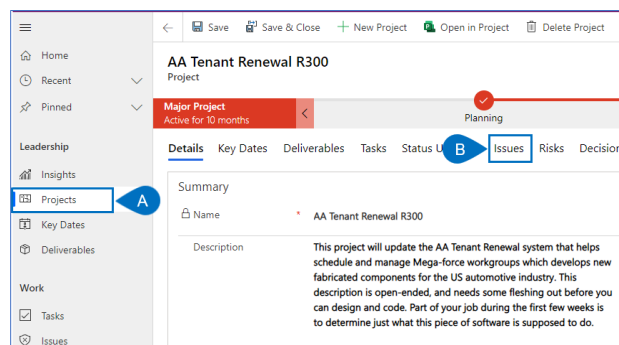
Project Manager



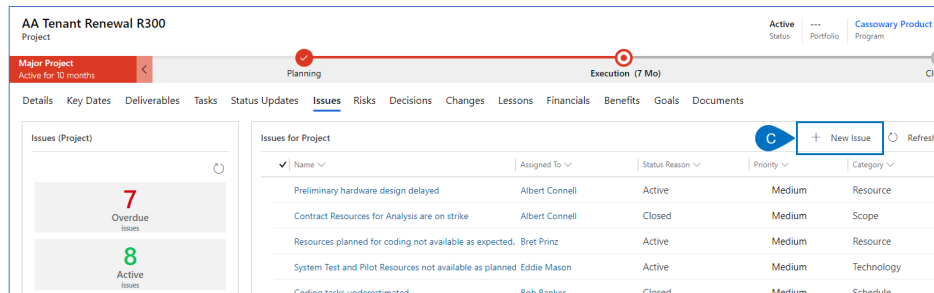
Projects – Issues tab

1. CREATE AN ISSUE

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



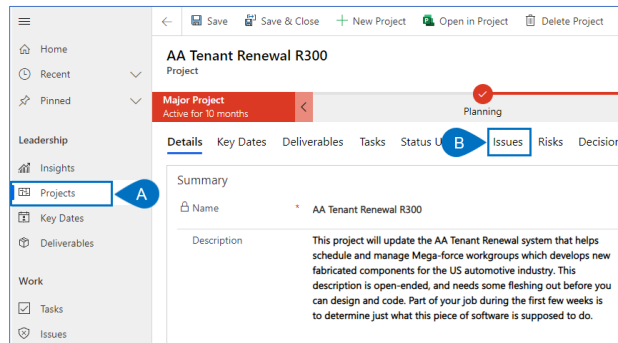
- c. Click **+ New Issue**.



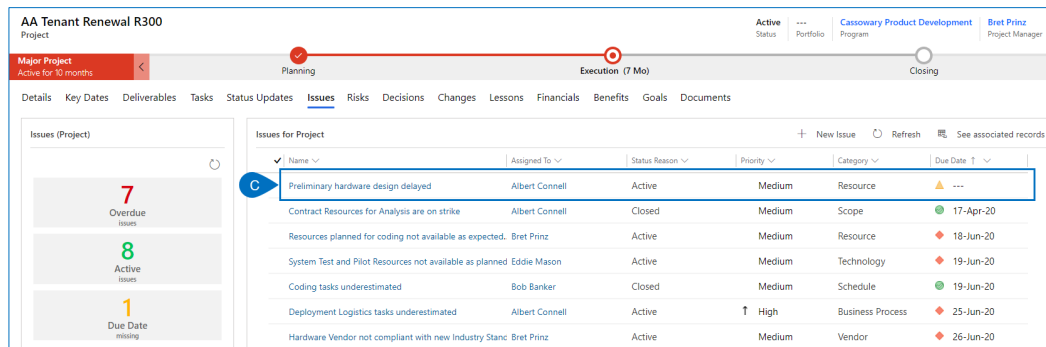
- Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the issue in screens, reports, and dashboards.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

2. UPDATE ISSUES

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

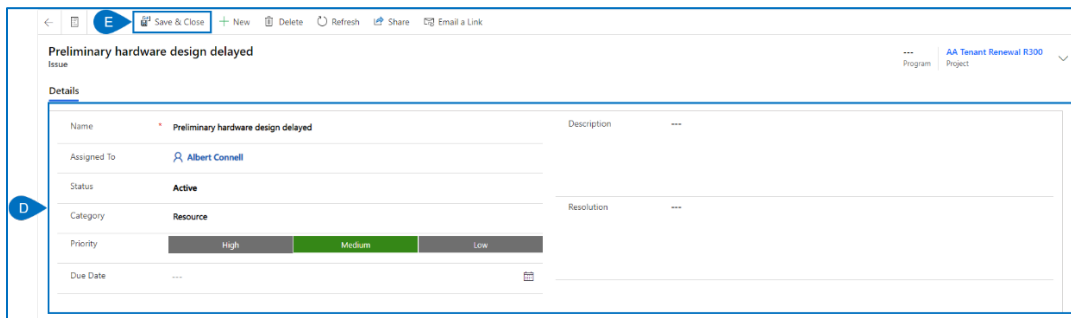


c. Click on the **Issue** to be updated from the list.



d. Update any field, as required.

e. Click **Save & Close**.



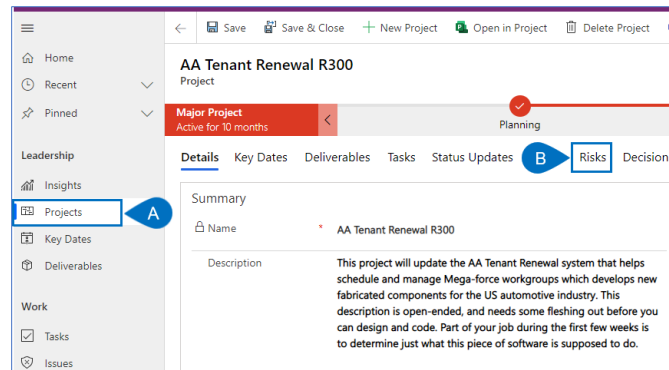
Manage project risks

 Project Manager

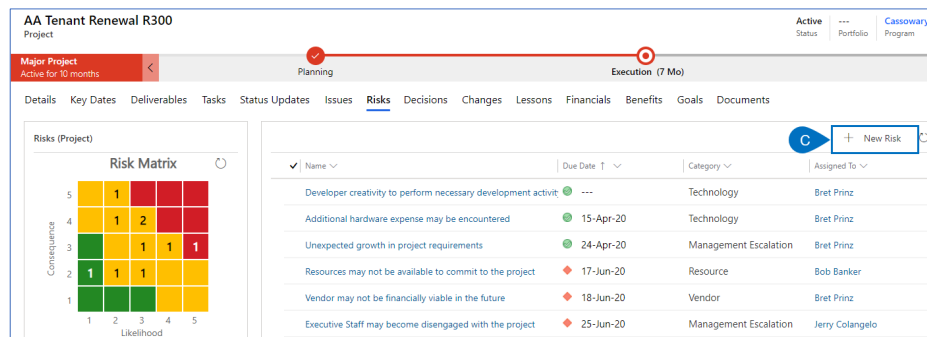
 Projects – Risks tab

1. CREATE A RISK

- Ensure you have the appropriate project open in **Projects**.
- Click the **Risks** tab.



- Click **+ New Risk**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Risk

| | | |
|---------------------|---|--------|
| Name | * | --- |
| Assigned To | | --- |
| Status | | Active |
| Category | | --- |
| Due Date | | --- |
| Likelihood | * | --- |
| Consequence | * | --- |
| Cost | | --- |
| Description | | --- |
| Mitigation Plan | | --- |
| Contingency Plan | | --- |
| Trigger Description | | --- |
| Trigger | | Date |

Save and Close Cancel

2. UPDATE RISKS

- Ensure you have the appropriate project open in **Projects**.
- Click the **Risks** tab.

AA Tenant Renewal R300

Project

Major Project Active for 10 months

Planning

Details Key Dates Deliverables Tasks Status Updates Risks Decisions

Summary

Name AA Tenant Renewal R300

Description This project will update the AA Tenant Renewal system that helps schedule and manage Mega-force workgroups which develops new fabricated components for the US automotive industry. This description is open-ended, and needs some fleshing out before you can design and code. Part of your job during the first few weeks is to determine just what this piece of software is supposed to do.

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

Save & Close
New
Delete
Refresh
Share
Email a Link

Developer creativity to perform necessary development activity

Risk

Portfolio
Program
AA Tenant Renewal R300
Project
Benefit

Details

| | | | |
|-------------|--|---------------------|------|
| Name | Developer creativity to perform necessary development activity | Description | |
| Assigned To | Bret Prinz | Mitigation Plan | |
| Status | Closed | Contingency Plan | |
| Category | Technology | Trigger Description | |
| Due Date | | Trigger | Date |
| Likelihood | Rare | | |
| Consequence | Minor | | |
| Cost | \$5,000.00 | | |

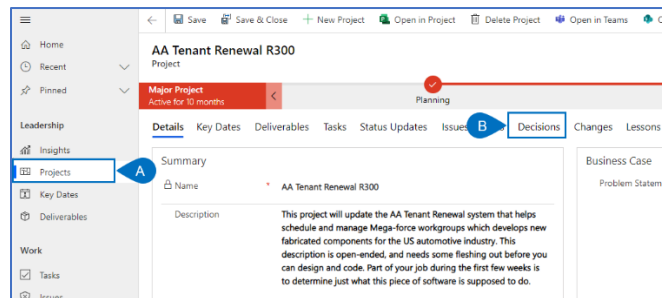
Track project decisions

Project Manager

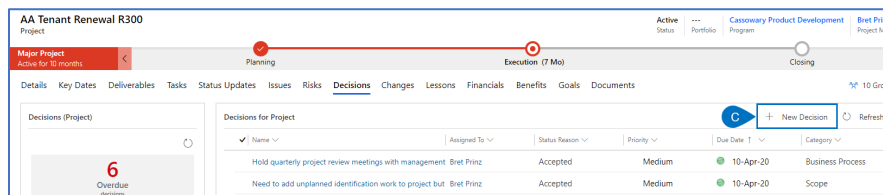
Projects – Decisions tab

1. CREATE A DECISION

- Ensure you have the appropriate project open in **Projects**.
- Click the **Decisions** tab.



- Click **+ New Decision**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Decision

D

Name

Description

Status

Priority

Due Date

E

Category

Escalation Required

Escalation Manager

Decision Date

Approver

Assigned To

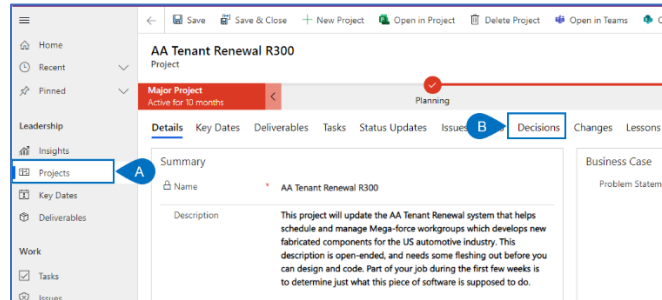
F

Save and Close

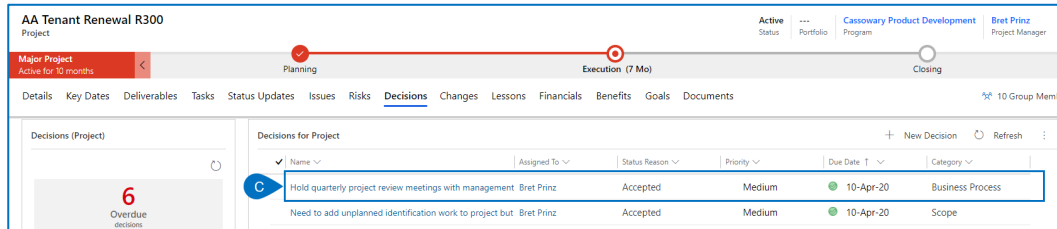
Cancel

2. UPDATE DECISIONS

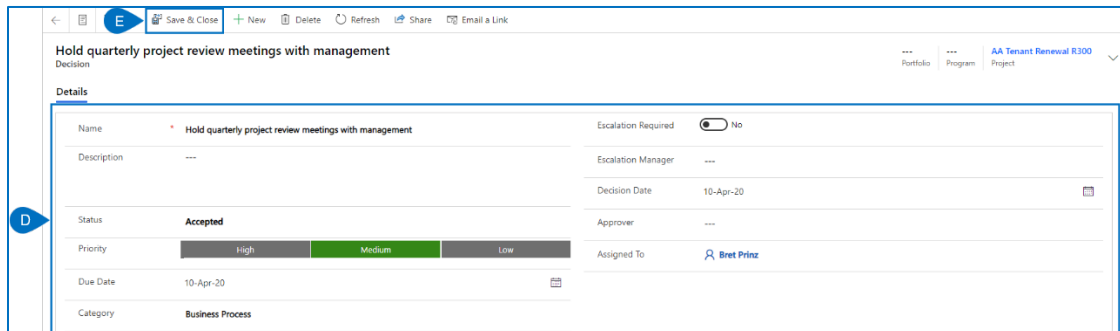
- Ensure you have the appropriate project open in **Projects**.
- Click the **Decisions** tab.



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



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



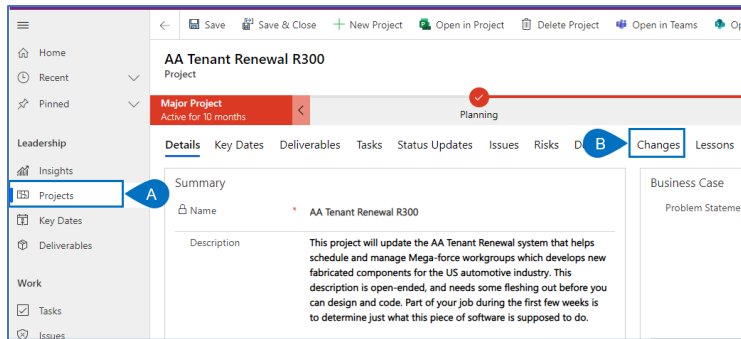
Record and manage change requests

Project Manager

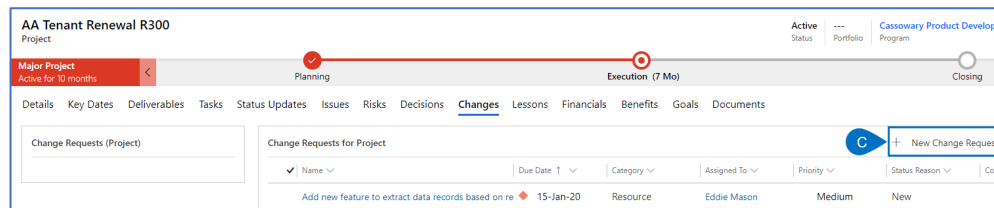
Projects – Changes tab

1. CREATE NEW CHANGE REQUEST

- Ensure you have the appropriate project open in **Projects**.
- Click the **Changes** tab.



- Click **+ New Change Request**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Change Request

D Name *

Description

Driven By

Implementation Date

Category

Priority **Medium**

Assigned To

Work Effort Estimate

E Work Effort Details

Cost Estimate

Cost Estimate Details

Duration Estimate

Duration Estimate Details

Resource Impacts

Impact on Other Projects

Assumptions

Approved / Rejected By

F Save and Close

Cancel

2. UPDATE CHANGE REQUESTS

- Ensure you have the appropriate project open in **Projects**.
- Click the **Changes** tab.

AA Tenant Renewal R300

Project

Major Project Active for 10 months

Planning

A Projects

B Changes

Summary

Name AA Tenant Renewal R300

Description This project will update the AA Tenant Renewal system that helps schedule and manage Mega-force workgroups which develops new fabricated components for the US automotive industry. This description is open-ended, and needs some fleshing out before you can design and code. Part of your job during the first few weeks is to determine just what this piece of software is supposed to do.

Business Case

Problem Statement

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

AA Tenant Renewal R300

Project

Active Status Portfolio Program

Cassowary Product Development

Bret Prinz Project Manager

Major Project Active for 10 months

Planning Execution (7 Mo) Closing

Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions **Changes** Lessons Financials Benefits Goals Documents

Change Requests (Project)

Change Requests for Project

+ New Change Request Refresh

| Name | Due Date | Category | Assigned To | Priority | Status Reason | Cost Estimate |
|--|-----------|----------|--------------|----------|---------------|---------------|
| Add new feature to extract data records based on re | 15-Jan-20 | Resource | Eddie Mason | Medium | New | --- |
| Evaluate need for additional Analysis of Current Envir | 13-Mar-20 | Schedule | Steve Router | Medium | Approved | \$0.00 |


C

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

The screenshot shows the Altus Change Request interface. At the top, a navigation bar contains buttons: Save & Close (highlighted with a blue box), New, Delete, Refresh, Share, and Email a Link. Below the navigation bar, the main content area displays a change request titled "Add new feature to extract data records based on record creation date." The form is divided into two columns. The left column contains fields for Name, Description, Driven By (Vendor), Implementation Date (14-Jan-20), Category (Resource), Priority (High, Medium, Low), Assigned To (Eddie Mason), Work Effort Estimate, Work Effort Details, Cost Estimate, and Cost Estimate Details. The right column contains fields for Duration Estimate, Duration Estimate Details, Resource Impacts, Impact on Other Projects, Assumptions, Approved / Rejected By, Approved / Rejected Date, Due Date (15-Jan-20), and Status (New). A blue box also highlights the "Save & Close" button in the top navigation bar.

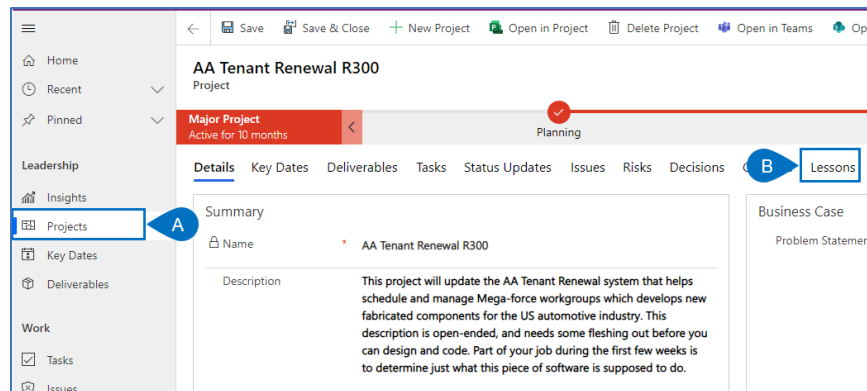
Capture lessons learned

 Project Manager

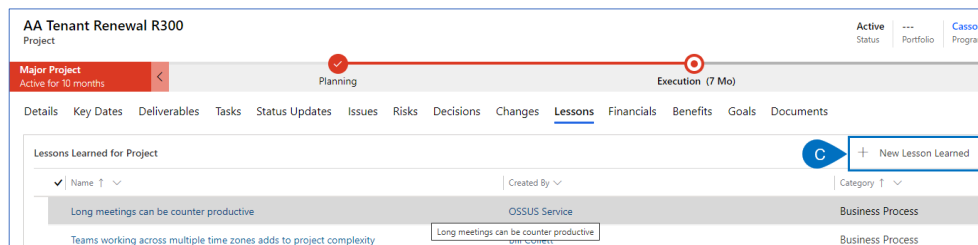
 Projects – Lessons tab

1. CREATE NEW LESSON LEARNED

- Ensure you have the appropriate project open in **Projects**.
- Click the **Lessons** tab.



- Click **+ New Lesson Learned**.



- 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.
- Provide additional details in the remaining fields.
- Click **Save and Close**.

Quick Create: Lesson Learned

D

Name

*

E

Category

Status

Active

Observation

Recommendation

Lesson Learned

Action Taken

F

Save and Close

Cancel

2. UPDATE LESSONS LEARNED

- Ensure you have the appropriate project open in **Projects**.
- Click the **Lessons** tab.

Home

Recent

Pinned

Leadership

Insights

Projects

Key Dates

Deliverables

Work

Tasks

Issues

AA Tenant Renewal R300

Project

Major Project

Active for 10 months

Planning

Details

Key Dates

Deliverables

Tasks

Status Updates

Issues

Risks

Decisions

Lessons

Business Case

Problem Statement

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

AA Tenant Renewal R300

Project

Active

Status

Portfolio

Cassio

Progress

Major Project

Active for 10 months

Planning

Execution (7 Mo)

Details

Key Dates

Deliverables

Tasks

Status Updates

Issues

Risks

Decisions

Changes

Lessons

Financials

Benefits

Goals

Documents

Lessons Learned for Project

+ New Lesson Learned

C

Long meetings can be counter productive

OSSUS Service

Business Process

Teams working across multiple time zones adds to project complexity

Bill Collett

Business Process

Key projects resources are in demand by many PMs during the same time periods

Bill Collett

Resource

Project team consistency ensures greater success to a project

Bill Collett

Resource

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

E

Save & Close

New

Delete

Refresh

Share

Email a Link

Long meetings can be counter productive

Lesson Learned

--- AA Tenant Renewal R300

Program Project

D

Details

Name

Long meetings can be counter productive

Category

Business Process

Observation


Recommendation

Lesson Learned

Action Taken

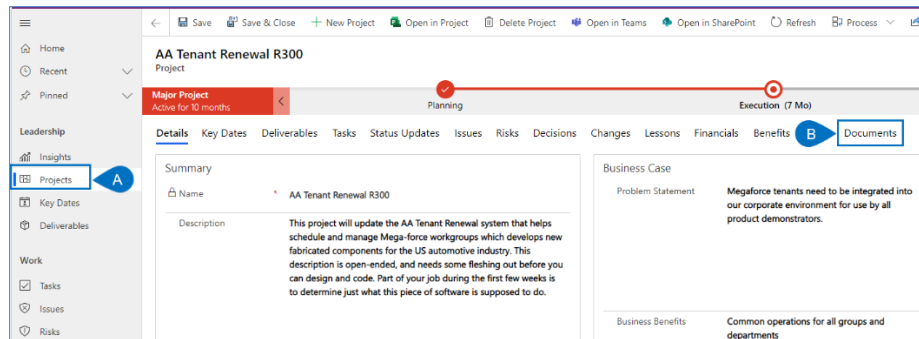
Manage project documents

 Project Manager

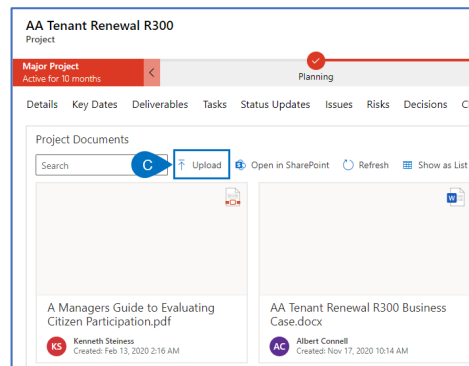
 Projects – Documents tab

1. UPLOAD NEW DOCUMENTS

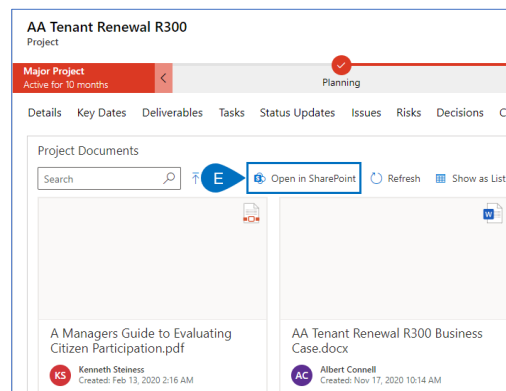
- Ensure you have the appropriate project open in **Projects**.
- Click the **Documents** tab.



- Click **+ Upload**.

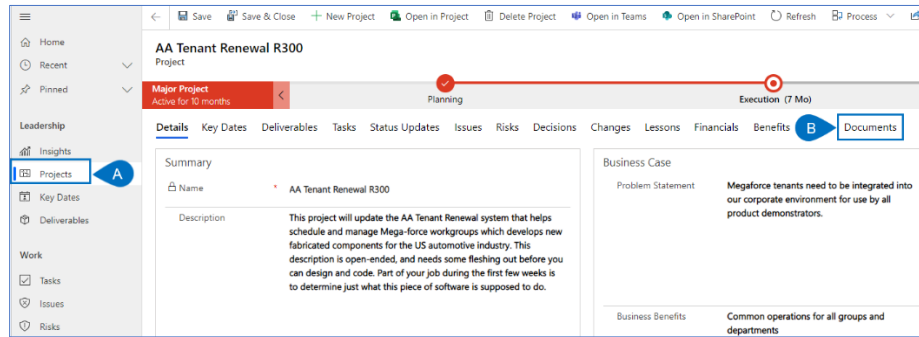


- Browse and select** the new document to be added to the project repository.
- Alternatively, you can click on **Open in SharePoint** to work directly in SharePoint for more document management functionality, including working with folders and creating new documents from scratch.

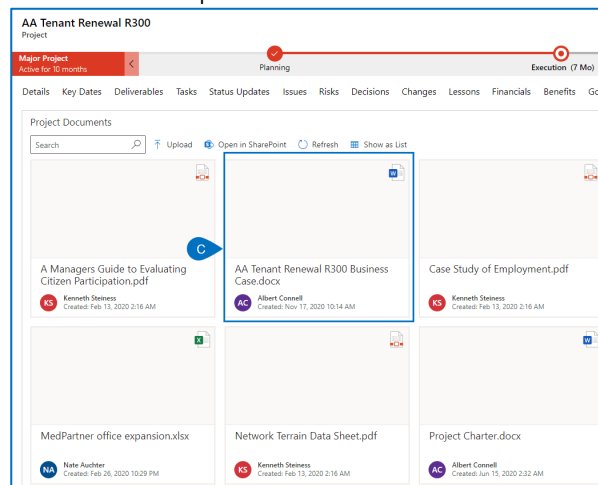


2. VIEW OR UPDATE EXISTING DOCUMENTS

- Ensure you have the appropriate project open in **Projects**.
- Click the **Documents** tab.



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



- 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.

