

Overview

This Job Aid defines the steps for team members to follow for collaborating on projects in the platform. This includes both tasks and artifacts, such as issues, risks, decisions, changes, lessons learned, and documents.

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

There are eight (8) collaboration entity job aids available to help you deliver your project.

1. Project collaboration in Teams.
2. Updating project tasks.
3. Manage project issues.
4. Manage project risks.
5. Track project decisions.
6. Record and manage change requests.
7. Maintain project documents.
8. Capture lessons learned.

Project collaboration in Teams



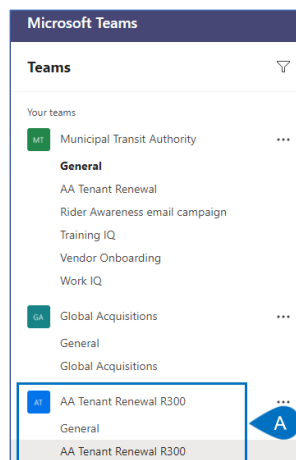
Team Member



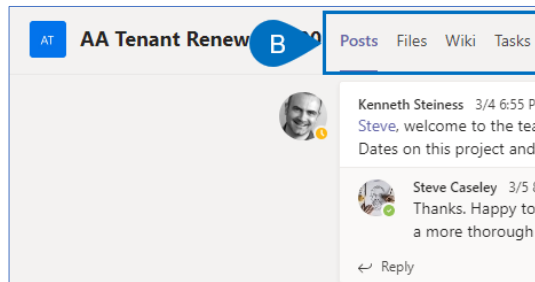
Microsoft Teams

1. ACCESS A PROJECT TEAM/CHANNEL

- a. Find and open the **project team and channel** in Microsoft Teams.



- b. Use standard Teams functionality, such as **Posts, Files, Wiki**, etc., to **collaborate** with other team members.



- c. Leverage the **Projects** tabs to connect with other project artifacts maintained in Projects.

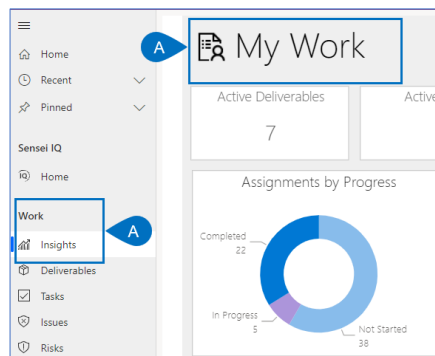
Updating project tasks

Team Member

Work – Insights

1. IDENTIFY AND UPDATE CURRENT WORK ASSIGNMENTS

- a. Ensure you are in Work, select **Insights**, and ensure you are on the **My Work** page.



- b. Review the tasks in the **1-Current** area on the report, with a focus on the **red and yellow tasks** as these are already late, or currently due.
- c. Click on the **link button** to open the task detail in the appropriate scheduling tool.

Planning Window > Project > Assignment		KPI	Link
1-Current			
2021 Customer Support	General Test Team Support		
eCommerce Upgrade v2	Define Application Requirements		
	Determine Project Scope		
	Draft preliminary software design		
eCommerce Upgrade vAN	Determine Project Scope		
Electronic Asset Tracking System	Backlog grooming		
Employee Satisfaction Survey	Review feedback comments and update survey		
Expand all revenue fields	QA		
	UAT		

- d. As appropriate, update the details to maintain the task's status. Specifically, you should track your current progress by updating either the **% complete** or the **effort completed** and **effort** fields. You should also review and update as needed the **Finish date** to accurately reflect when you believe you can complete this task.

Design studies

Project Task

General

Resources

Dependencies

Child Tasks

Related

Name

Design studies

Category

Notes

Start

1/18/2021

Finish

3/1/2021

Due Date

Effort (Hours)

500.00


Effort Completed (Hours)


275.00

Percent Complete

55

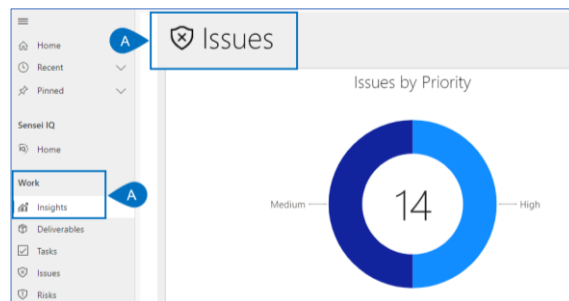
Manage project Issues

 Team Member













 Work – Insights

1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

- a. Ensure you are in Work, select **Insights**, and ensure you are on the Issues page.



- b. Review the issues on the report, with a focus on the **red ones** as these are already late, or currently due.
- c. Click on the **link button** to open the issue details.

KPI	Issue	Link
	Coding tasks underestimated	
	Deployment Logistics tasks underestimated	
	Equipment Backorder	
	Existing system documentation insufficient	
	Language Barrier	
	Power outage at Data Center	

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

Preliminary hardware design delayed
Issue

Details

Name: Preliminary hardware design delayed

Assigned To: Albert Connell

Status: Active

Category: Resource

Priority: High Medium Low

Due Date: ---

Save & Close

Manage project Risks

Team Member

Work - Insights

1. IDENTIFY AND UPDATE CURRENT RISKS ASSIGNED TO YOU

- a. Ensure you are in Work, select **Insights**, and ensure you are on the **Risks** page.



- b. Review the risks on the report, with a focus on the **red ones** as these are already late, or currently due.
- c. Click on the **link button** to open the risk details.

KPI	Risk	Link
◆	Additional Funding not available	Link
◆	Currency conversion fluctuations	Link
◆	Detailed Hardware Design may be delayed	Link
◆	Economic Volatility	Link
◆	Funds may not be available to complete project	Link
◆	Invalid data from old tenant databasess	Link
◆	Network Protocol Communication Exchange could incur further delays	Link

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

The screenshot shows a risk management interface. At the top, there's a toolbar with buttons like 'Save & Close', 'New', 'Delete', 'Refresh', 'Share', and 'Email a Link'. Below this, the title 'Developer creativity to perform necessary development activity' is displayed. The main area is divided into two columns. The left column contains fields for 'Assigned To' (Bret Prinz), 'Status' (Closed), 'Category' (Technology), 'Due Date' (empty), 'Likelihood' (Rare), 'Consequence' (Minor), and 'Cost' (\$5,000.00). The right column contains fields for 'Description', 'Mitigation Plan', 'Contingency Plan', 'Trigger Description', and 'Trigger' (Date). A blue circle with the letter 'D' is placed over the 'Due Date' field.

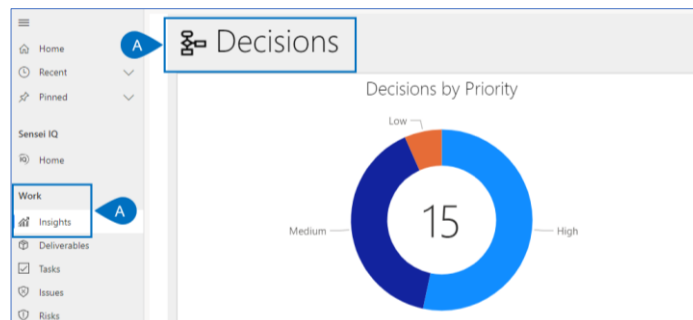
Track project Decisions

Team Member

Work – Insights

1. IDENTIFY AND UPDATE CURRENT ISSUES ASSIGNED TO YOU

- Ensure you are in Work, select **Insights**, and ensure you are on the **Decisions** page.



- Review the decisions on the report, with a focus on the **red ones** as these are already late, or currently due.
- Click on the **link button** to open the decision details.

KPI	Decision	Link
	Activated User Licenses for all users	
	data centers in each region	
	Double the license quantity	
	Leveraging Azure DevOps for Tracking all Development Efforts	

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

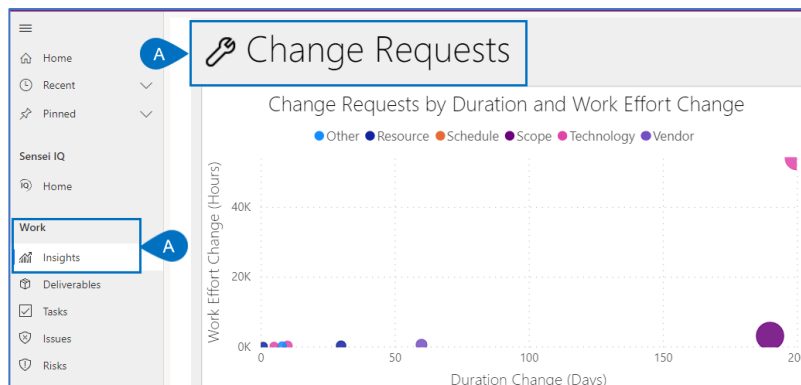
Record and manage Change Requests

Team Member

Work – Insights

1. IDENTIFY AND UPDATE CURRENT CHANGE REQUESTS ASSIGNED TO YOU

- Ensure you are in Work, select **Insights**, and ensure you are on the **Change Requests** page.



- Review the change requests on the report, with a focus on the **red ones** as these are already late, or currently due.
- Click on the **link button** to open the change request details.

KPI	Change Request	Link
	Add another country	
	Adjust Budget	
	Allow screen resolutions to change automatically	
	Customer Experience Center Date Change	
	Do not retrofit noise control to existing plant	

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

Change Request

Add new feature to extract data records based on record creation date.

Details

Name	Add new feature to extract data records based on record creation date.	Duration Estimate	---
Description	---	Duration Estimate Details	---
Driven By	Vendor	Resource Impacts	---
Implementation Date	14-Jan-20	Impact on Other Projects	---
Category	Resource	Assumptions	---
Priority	High Medium Low	Approved / Rejected By	---
Assigned To	Eddie Mason	Approved / Rejected Date	---
Work Effort Estimate	---	Due Date	15-Jan-20
Work Effort Details	---	Status	New
Cost Estimate	---		
Cost Estimate Details	---		

Capture Lessons Learned



Team Member



Projects – Lessons tab

1. CREATE NEW LESSON LEARNED

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

AA Tenant Renewal R300 Project

Major Project Active for 10 months

Planning

Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions Lessons

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 **+ New Lesson Learned**.

AA Tenant Renewal R300 Project

Active Status Portfolio Program

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

Name	Created By	Category
Long meetings can be counter productive	OSSUS Service	Business Process
Teams working across multiple time zones adds to project complexity	Long meetings can be counter productive	Business Process

- Fill in the **Name** field. This field 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.

- f. Click **Save and Close**.

Quick Create: Lesson Learned

Name * ---

Category ---

Status **Active**

Observation ---

Recommendation ---

Lesson Learned ---

Action Taken ---

Save and Close Cancel

2. UPDATE LESSONS LEARNED

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

AA Tenant Renewal R300

Project

Major Project Active for 10 months

Planning

Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions **Lessons**

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

- c. Select the **Lesson Learned** to be updated from the list.

AA Tenant Renewal R300

Project

Active Status Portfolio Program

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

Name	Created By	Category
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

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

Long meetings can be counter productive

Lesson Learned

Details

Name	Long meetings can be counter productive	Observation	---
Category	Business Process	Recommendation	---
		Lesson Learned	---
		Action Taken	---

AA Tenant Renewal R300
Program Project

Manage Project Documents



Team Member



Projects – Documents tab

1. UPLOAD NEW DOCUMENTS

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

AA Tenant Renewal R300
Project

Major Project
Active for 10 months

Planning

Execution (7 Mo)

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

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 Megaforce tenants need to be integrated into our corporate environment for use by all product demonstrators.

Business Benefits Common operations for all groups and departments

- Click **+ Upload**.

AA Tenant Renewal R300
Project

Major Project
Active for 10 months

Planning

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

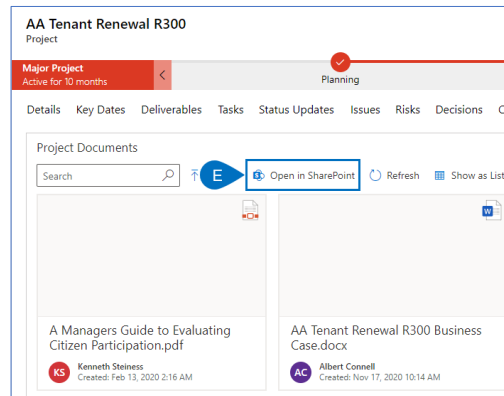
Project Documents

Search Upload Open in SharePoint Refresh Show as List

A Managers Guide to Evaluating Citizen Participation.pdf
Kenneth Stetson
Created: Feb 13, 2020 2:16 AM

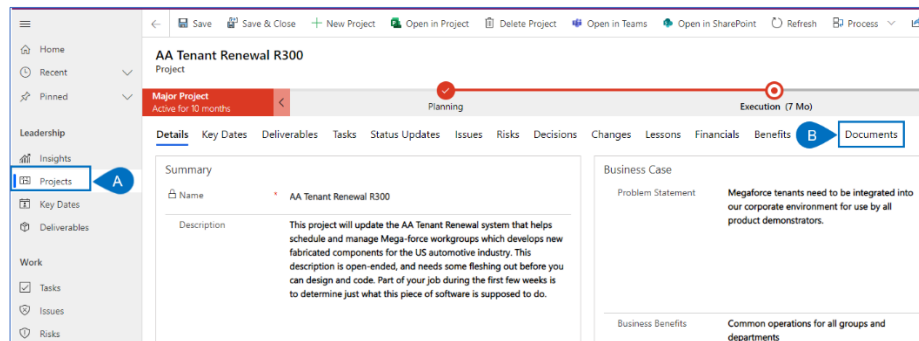
AA Tenant Renewal R300 Business Case.docx
Albert Corwell
Created: Nov 17, 2020 10:14 AM

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

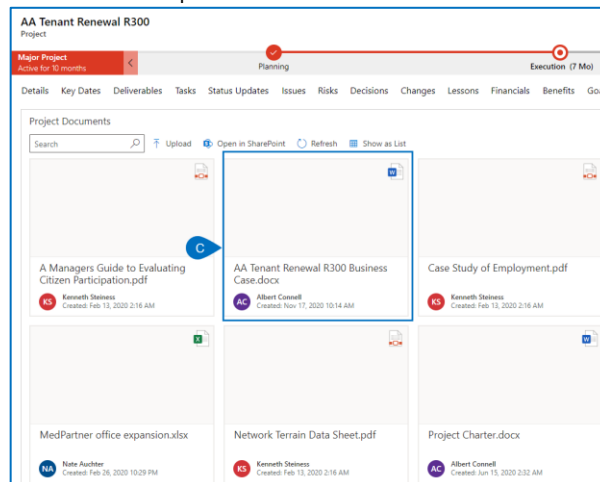


2. VIEW OR UPDATE EXISTING DOCUMENTS

- 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 edit the document in native SharePoint. This gives you more document management functionality, including working with folders and creating new documents from scratch.

