

## Overview

This Job Aid defines the steps to follow for creating a new project in the platform.

All new projects should be created in the platform. 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



Projects – New Blank Project

### 1. DEFINE THE NEW PROJECT

- a. Ensure you are in **Projects** in the platform, click **Projects** in the **Leadership** section.
- b. Click + New Project from the command bar.

Name	Start Date	Finish Date	Earliest Start Date
Application SaaS Migration	4/14/2020	7/13/2023	4/14/2020
Building Renovations	5/11/2020	4/9/2021	5/11/2020
Cassowary Mobile App	4/26/2020	12/27/2021	4/13/2020
Datacenter Redesign	4/14/2020	4/14/2020	4/14/2020
Design and Implement NSP Go-to-Market	4/14/2020	4/14/2020	4/14/2020
Eagle Mobile Phone Development	4/6/2020	10/30/2020	4/6/2020
Employee Hardware Refresh	4/14/2020	4/14/2020	4/14/2020
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 organisational standards to define the type of project being created.
- f. Select the **Project Schedule** and **External Project** (if appropriate)

The 'New Project' dialog box is shown with the following fields and callouts:

- Name \***: A text input field containing 'New Project'. Callout **C** points to this field.
- Project Type**: A dropdown menu. Callout **E** points to this field.
- Description**: A text input field. Callout **D** points to this field.
- Project Schedule**: A dropdown menu showing 'Project Online'. Callout **F** points to this field.
- Suggested projects**: A list of project suggestions with a scroll bar. Callout **F** points to this list.

- 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 Project Name)
- j. Define whether the **same M365 group** should own both the **Project and Planner plan**.

The 'New Project' dialog box is shown with the following fields and callouts:

- Project Schedule**: A dropdown menu showing 'Planner'.
- Microsoft O365 Group\***: A section with 'New group' and 'Existing group' tabs. Callout **G** points to the 'New group' tab.
- Enter a name to add a member**: A text input field. Callout **H** points to this field.
- Please enter a name for your Planner plan \***: A text input field. Callout **I** points to this field.
- Would you like the same Group to own your Project in Sensei IQ? \***: A dropdown menu. Callout **J** points to this field.

## 2. CREATE THE NEW PROJECT

- Select **Save** to create the project and apply the selected project type.

## 3. DEFINE THE PROJECT SPONSOR

- 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.

- Type the name in the **Project Sponsor** field (following your organisation's naming policies) to find and click on their name select the appropriate individual.

#### 4. CAPTURE PROJECT DETAILS

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

The screenshot shows the Altus project management interface for a project named 'Composite track engineering study'. The interface is divided into several sections:

- Header:** Includes a toolbar with options like 'Save', 'Save & Close', 'New Project', 'Open in Project', 'Refresh', 'Process', 'Share', 'Email a Link', and 'Run Report'. It also shows the project status as 'Active' and the user 'Albert Connell' as the Project Manager.
- Project Progress:** A circular progress indicator shows '0%' completion.
- Project Effort:** A section showing '0h effort completed' and '0h effort remaining'.
- Summary Pane:** Contains fields for Name, Description, Department, Scheduled Finish, Target Finish, Investment Category (Run, Grow, Transform), Location, and Project Type (Major Project).
- Business Case Pane:** Contains fields for Problem Statement, Business Benefits, Proposal Costs, Financial Benefits, and ROI (0.00).
- Project Status:** A section showing various project metrics and a 'Group Members' button.

#### 5. DEFINE THE PROJECT TEAM

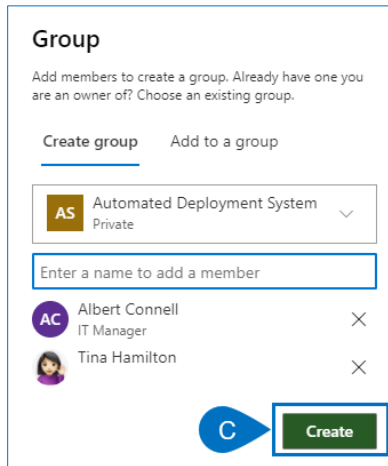
- Identify the **team members** by creating a Microsoft365 group specific to the project or associate the project to an existing group based on organisational policies by clicking on **Group Members**. If you **have synced the project with a Planner Plan**, the group **has already been defined**, but you should still **ensure all team members are included in the group**.



- Search for and **select the team members** for the project.

The screenshot shows the 'Group Members' dialog box. It has a title bar with 'Group Members' and a search icon. The main content area is titled 'Group' and contains the text: 'Add members to create a group. Already have one you are an owner of? Choose an existing group.' Below this, there are two tabs: 'Create group' and 'Add to a group'. The 'Create group' tab is selected. It shows a dropdown menu with 'AS Automated Deployment System Private' selected. Below the dropdown, there is a search bar with the text 'alb'. A list of search results is shown below the search bar, including 'Albert Connell IT Manager'. A blue circular icon with the letter 'B' is positioned next to the search results.

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



**Group**

Add members to create a group. Already have one you are an owner of? Choose an existing group.

**Create group**   Add to a group

AS Automated Deployment System  
Private

Enter a name to add a member

AC Albert Connell  
IT Manager

Tina Hamilton

C Create

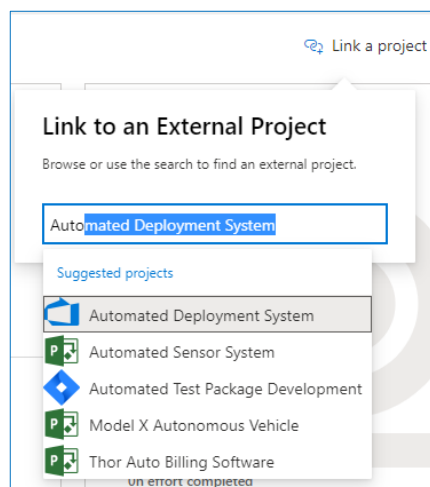
## 6. LINK THE PROJECT WITH AN EXTERNAL EXECUTION TOOL (IF APPROPRIATE AND NOT ALREADY DONE AS PART OF NEW PROJECT)

- a. Click **Link a project**.



Link a project   Add Members

- b. Search for and **select the external project**.



Link a project

**Link to an External Project**

Browse or use the search to find an external project.

Automated Deployment System

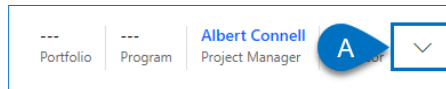
Suggested projects

- Automated Deployment System
- Automated Sensor System
- Automated Test Package Development
- Model X Autonomous Vehicle
- Thor Auto Billing Software

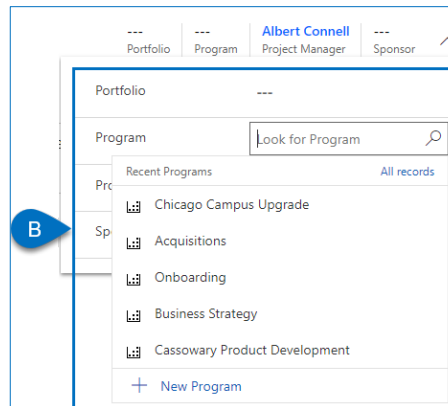
an error completed

## 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 a project from a template



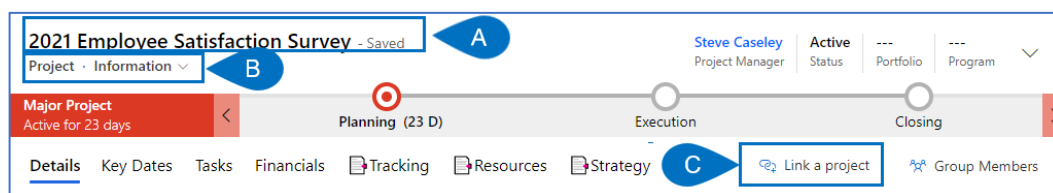
Project Manager



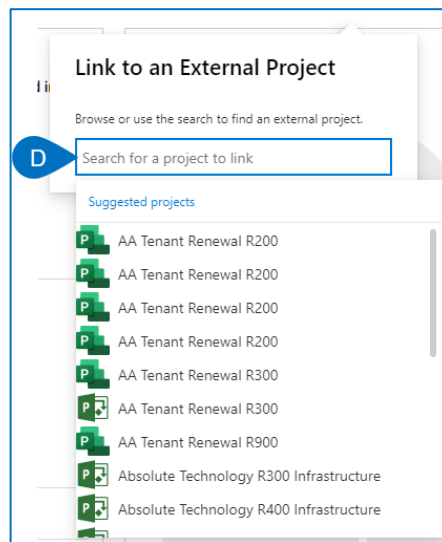
Projects – Current Project - Tasks

### 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 the platform.  
b. Ensure you are on the **Information Grouping** tab.  
c. Click **Link a project**.

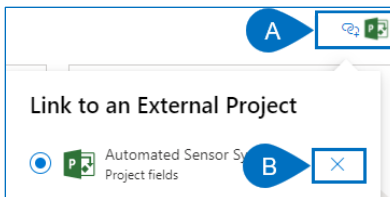


- d. Search for and **select the appropriate project**.

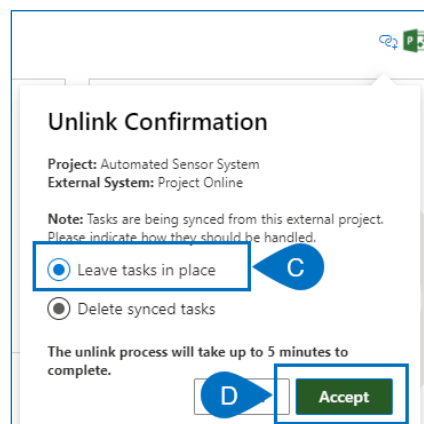


## 2. REMOVE EXTERNAL TOOL LINK BUT KEEP TASKS

- 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.

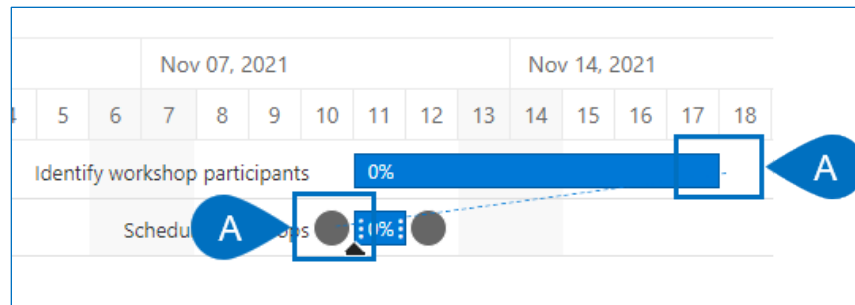


- c. Ensure **Leave tasks in place** is selected.
- d. Click **Accept**.



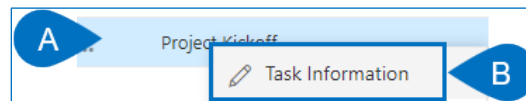
## 3. ADD TASK DEPENDENCIES

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

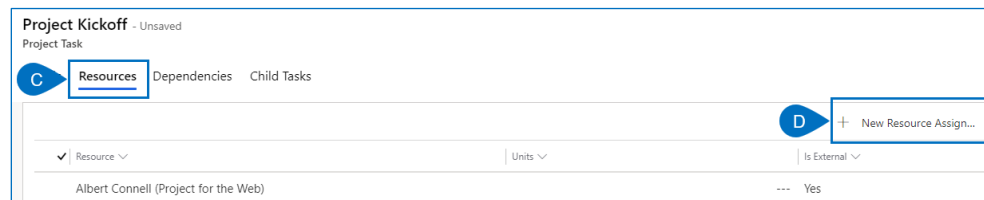


#### 4. REPLACE EXTERNAL RESOURCES WITH NAMED RESOURCES

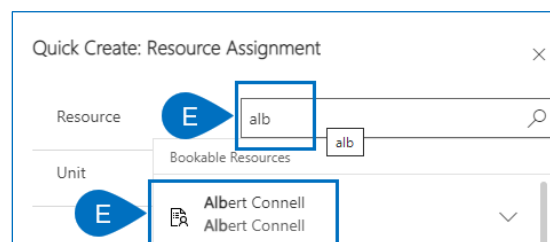
- Right-mouse click** on the task you need to replace the resource.
- Select **Task Information**



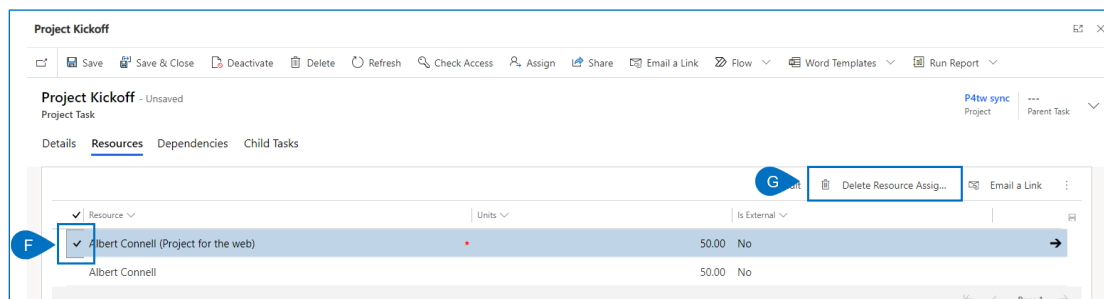
- Go to the **Resources** tab.
- Click **New Resource Assignment**



- Search for and **select the new enterprise resource**.



- Select** the external tool synchronised resource.
- Click **Delete Resource Assignment**.





# Capture Key Dates



Project Manager



Projects – Current Project – Key Dates

## 1. CAPTURE KEY DATES

- Ensure you have the appropriate project open in the platform.
- Click the **Key Dates** tab.
- Click **+ New Key Date**.

- Complete the **Quick Create: Key Date** form and then click **Save and Close**.

- 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.

## Identify Deliverables



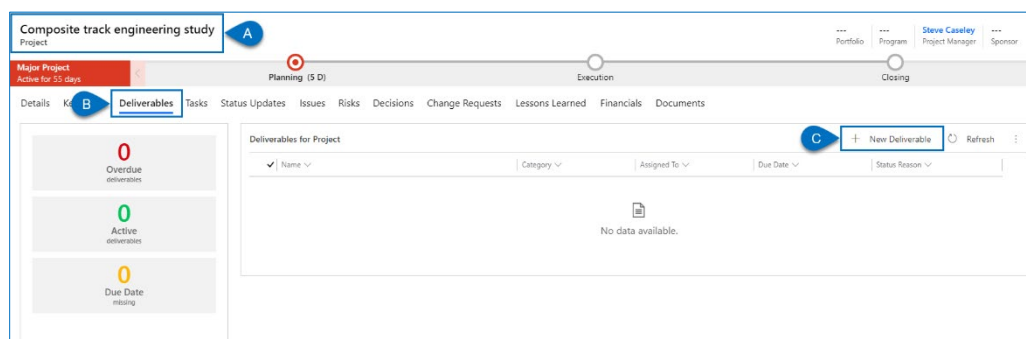
Project Manager



Projects – Current Project – Deliverables

### 1. IDENTIFY DELIVERABLES

- Ensure you have the appropriate project open in the platform.
- Click the **Deliverables** tab.
- Click **+ New Deliverable**.



- Complete the **Quick Create: Key Date** form and then click **Save and Close**.

Quick Create: Deliverable

Name \* ---

Description ---

Progress Update ---

Category ---

Assigned To ---

Due Date ---

Status **In Progress**

## Create Resource Requests



Project Manager



Projects – Current Project – Resource Plan

### 1. CREATE GENERIC RESOURCE REQUESTS

- Ensure you have the appropriate project open in the platform.
- Ensure you are on the **Resources** Grouping tab and select **Resource Plan**.

- c. Use the **Select a Resource** 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.

Requests by Primary Role	Visible Period Total ←		February 2021			March 2021			April 2021			May 2021	
	P	C	P	C	A	P	C	A	P	C	A	P	C
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	325.0					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



Project Manager



Projects – Current Project - Financials

## 1. CREATE THE PROJECT BUDGET

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

- 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 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.

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

**New Budget**

Please ensure all transactions have a date selected and a value entered.

Name \*

Financial Category \*

Department

Note

**Transactions**

Only transactions with a date and a value will be saved.

Generate Transactions + Add Transaction

Date	Budget	Note
	\$	
Total:	\$0.00	

Save and 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.

**Generate Transactions**

Enter a value to distribute evenly between monthly transactions between the two dates below.

Amount to distribute

Start date

End date

Generate Cancel

- 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 single amount to be entered or need to enter varied amounts.
- j. Enter the **date** and **amount**.

**Transactions**

Only transactions with a date and a value will be saved.

Generate + Add Transaction

Date	Budget	Note
1 Jul 2020	\$ 10000	
1 Aug 2020	\$ 10000	
1 Sep 2020	\$ 10000	
1 Oct 2020	\$ 10000	
1 Nov 2020	\$ 10000	
Total:	\$50,000.00	