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.

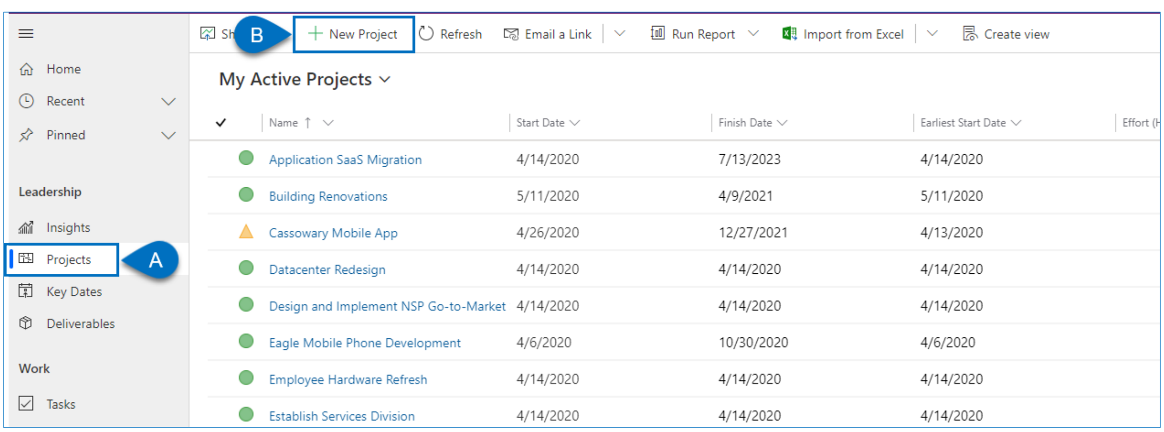
Define the project

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.



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)

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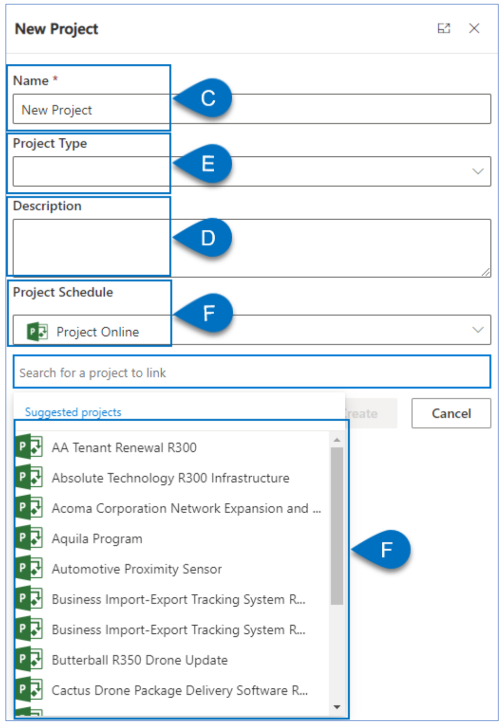
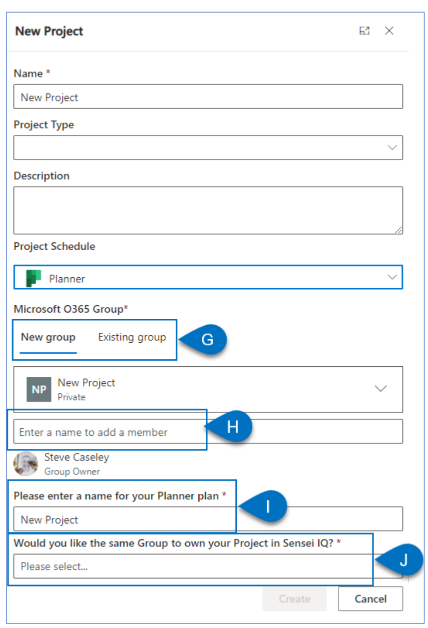


g. If the external project is **Planner, Create a new group** or **select an Existing Microsoft 365 group** for the project. If you use an **existing M365 group,** you can link to an **existing Planner plan or create a new one.**
h. **Add team members** to the M365 group.
i. Enter a **name for the Planner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



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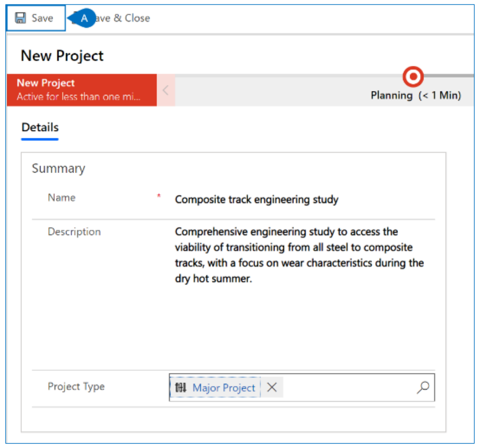
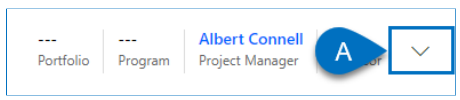
2. CREATE THE NEW PROJECT

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

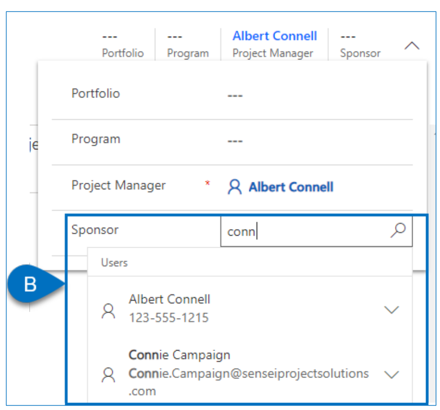


3. DEFINE THE PROJECT SPONSOR

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 organisation's naming policies) to find and click on their name select the appropriate individual.



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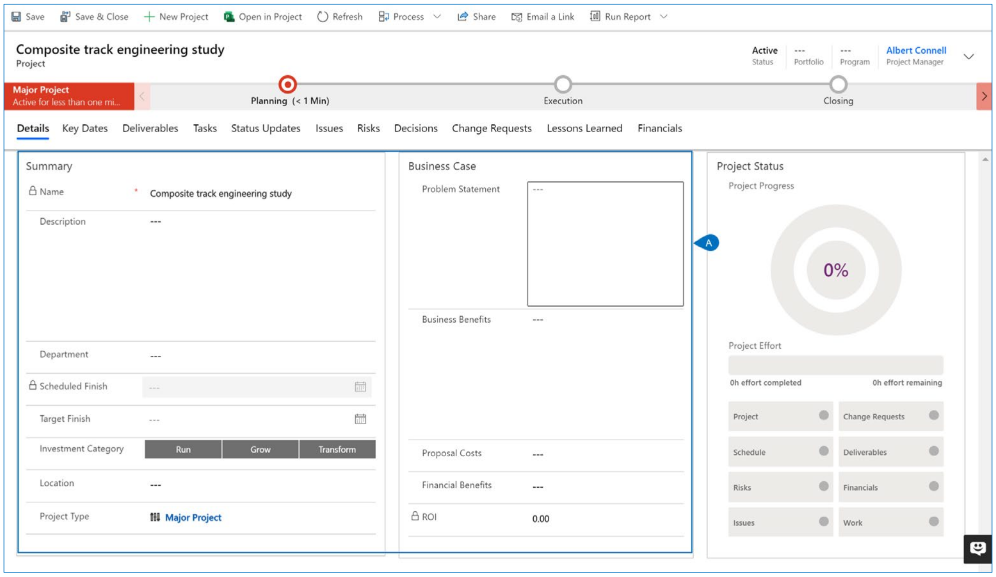
4. CAPTURE PROJECT DETAILS

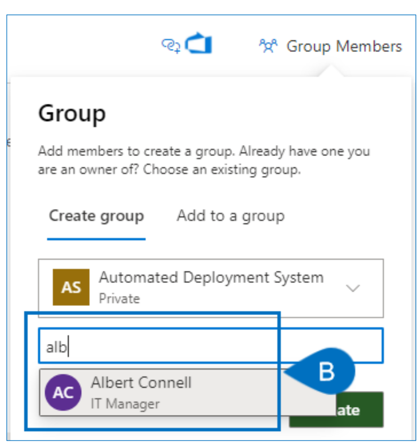
a. Complete the **Summary** and **Business Case** panes (or the appropriate forms defined by your organisation's Project Type).



5. DEFINE THE PROJECT TEAM

a. 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.**

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



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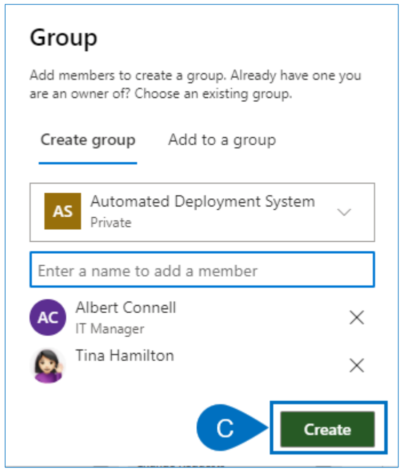
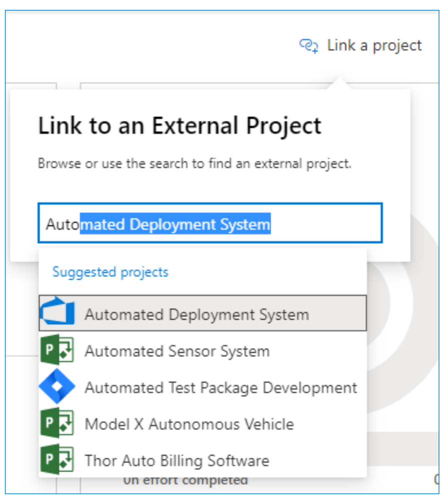
c. Click **Create** to create the new group.



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.**



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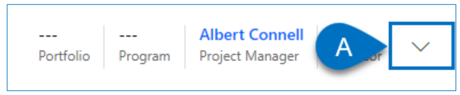
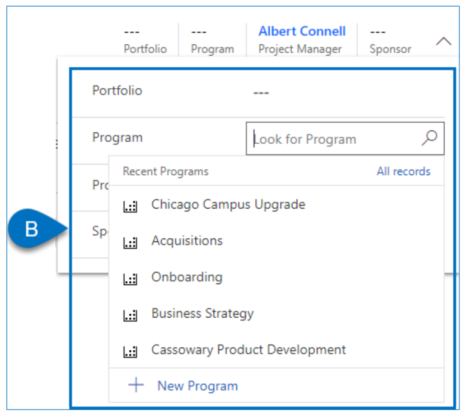
7. ASSOCIATE THE PROJECT WITH A PORTFOLIO OR PROGRAM (IF APPROPRIATE)

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.

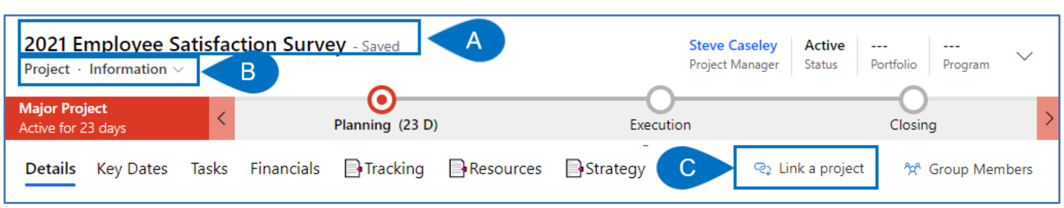


Build a project from a template

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**.



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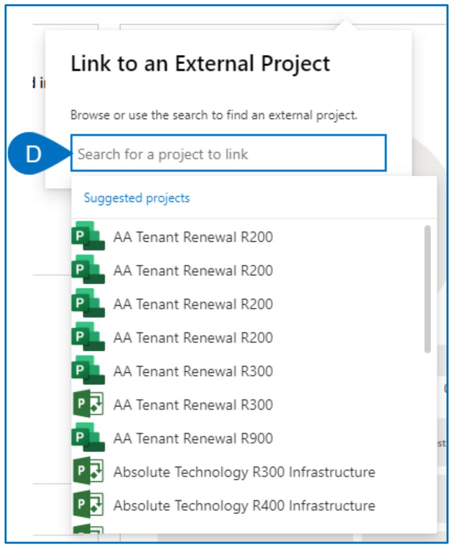
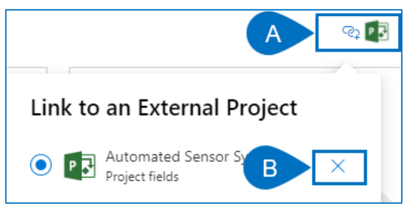
d. Search for and **select the appropriate project.**

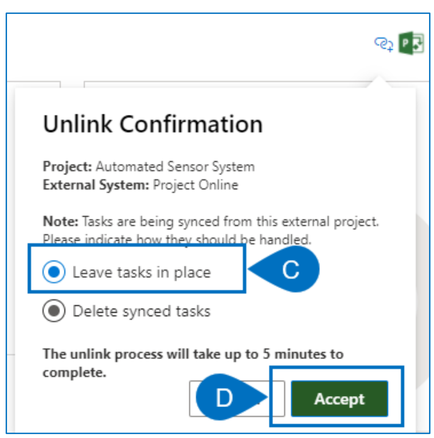


2. REMOVE EXTERNAL TOOL LINK BUT KEEP TASKS

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.

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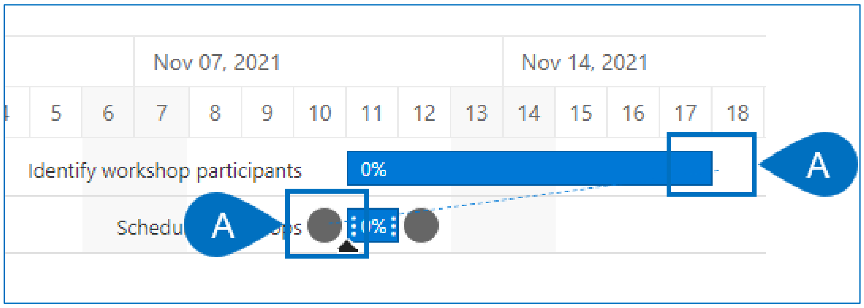
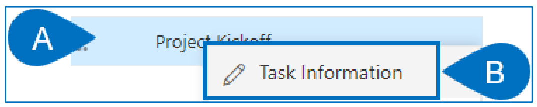


4. REPLACE EXTERNAL RESOURCES WITH NAMED RESOURCES

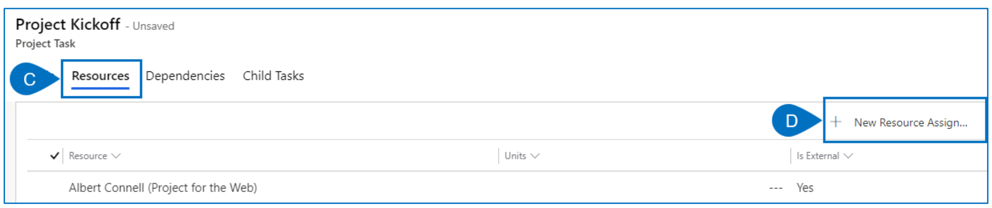
a. **Right-mouse click** on the task you need to replace the resource.

b. Select **Task Information**

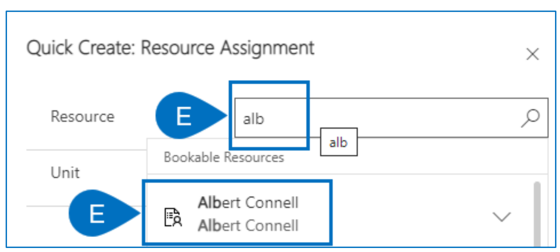


c. Go to the **Resources** tab.

d. Click **New Resource Assignment**

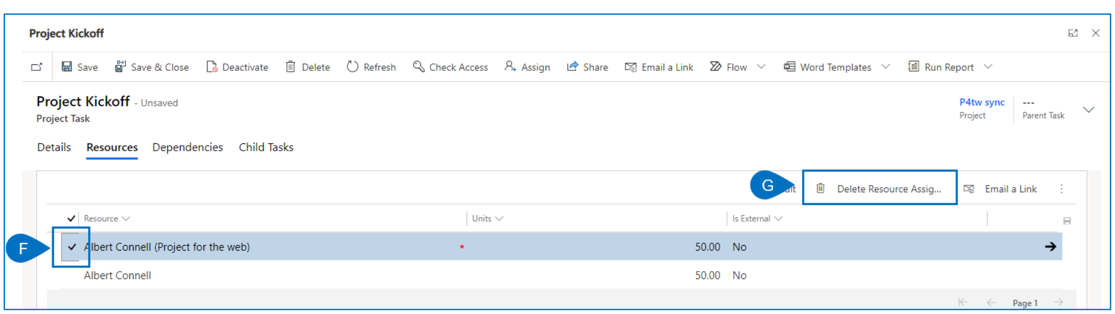


e. Search for and **select the new enterprise resource.**



f. **Select** the external tool synchronised resource.

g. Click **Delete Resource Assignment.**



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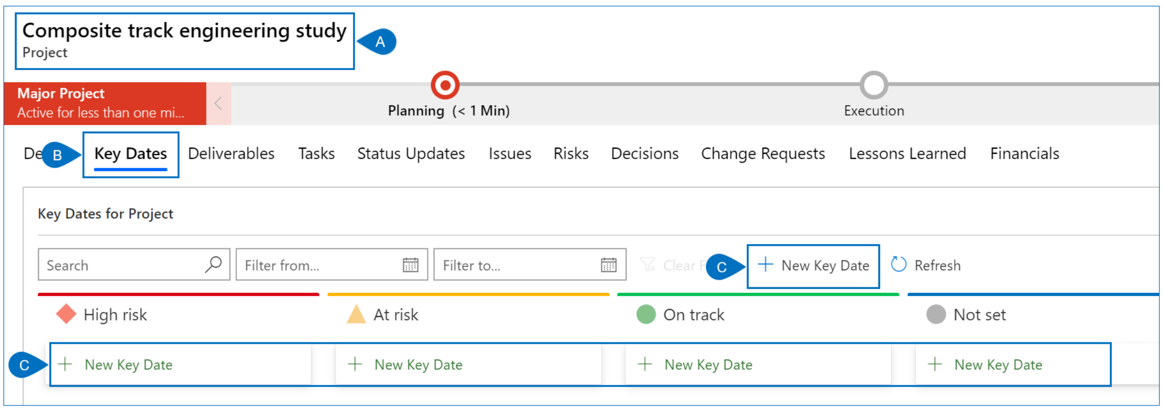
Capture Key Dates

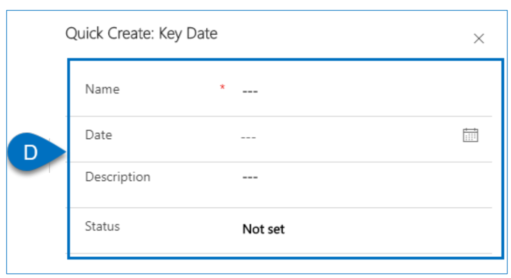
Project Manager — Projects – Current Project – Key Dates

1. CAPTURE KEY DATES

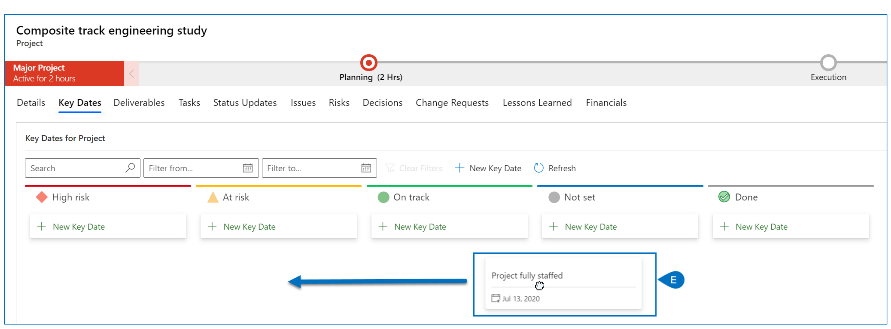
a. Ensure you have the appropriate project open in the platform.
b. Click the **Key Dates** tab.
c. Click **+ New Key Date.**



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



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.



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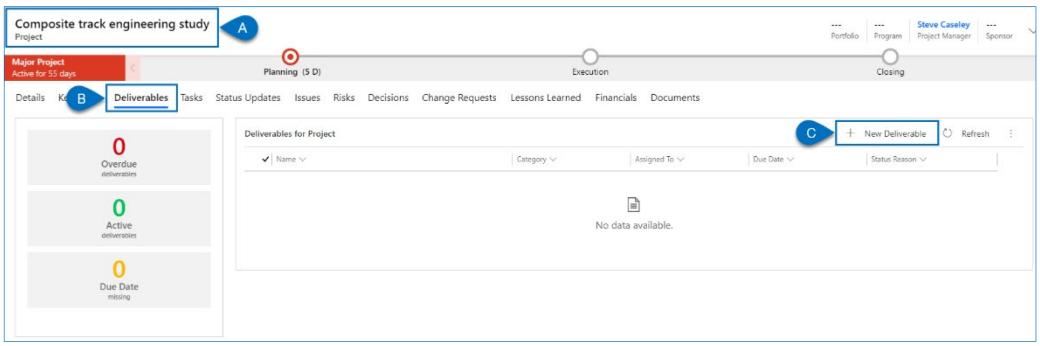
Identify Deliverables

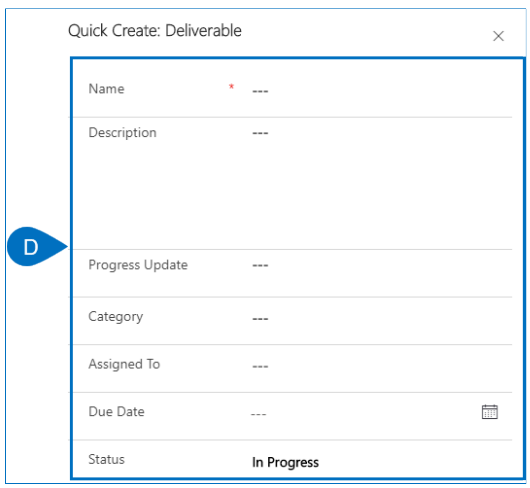
Project Manager Projects – Current Project – Deliverables

1. IDENTIFY DELIVERABLES

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



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



Create Resource Requests

Project Manager Projects – Current Project – Resource Plan

1. CREATE GENERIC RESOURCE REQUESTS

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

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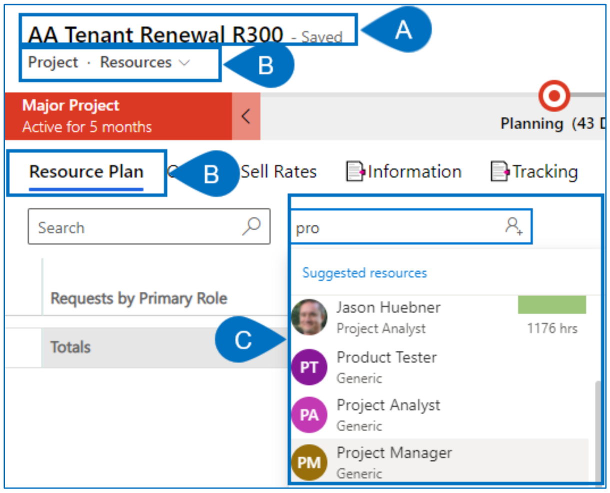
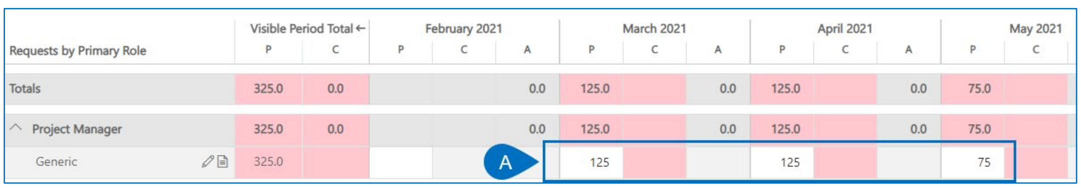
c. Use the **Select a Resource** search box and find the **generic resource** you want to request for the new project.



2. DEFINE GENERIC RESOURCE REQUIREMENTS

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



3. SUBMIT RESOURCE REQUESTS FOR REVIEW AND APPROVAL

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

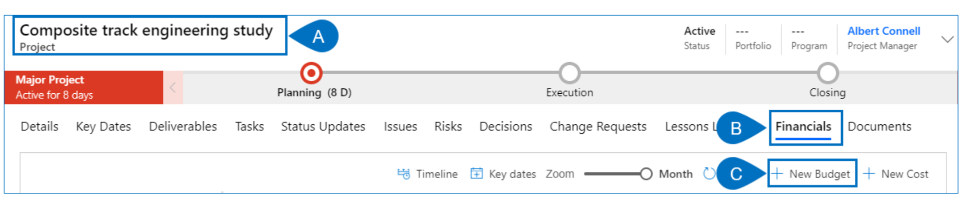
Record the project budget

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.

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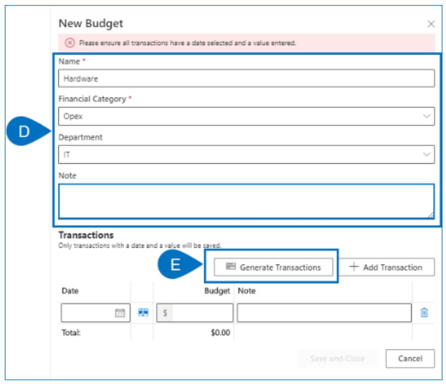
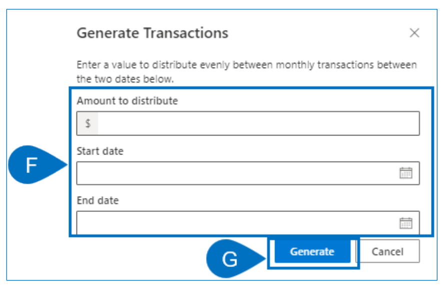
There are two methods to enter budgets depending on the data you need to enter. Generate Transactions with will allow you to spread a budget amount evenly over a set period of months which can be contoured afterward. Or you can add budget line items individually by entering the data in the transaction lines directly and using +Add Transaction to add additional lines.

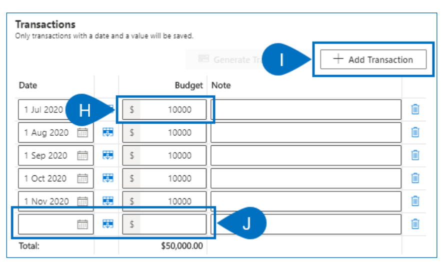
e. Click the **Generate Transactions** button if you have a set dollar amount that needs to be spread evenly over several months.



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.



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**.



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