

## Creating a Project



Project Manager



Projects

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of the platform in the classroom. While the examples used herein may be different from (or not available) in your organisation's the platform instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the platform.

Please note the Job Aid for **Creating a New Project** within the platform learning compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

- Lab Exercise 1. Define the Project
- Lab Exercise 2. Capture Key Dates
- Lab Exercise 3. Identify Deliverables
- Lab Exercise 4. Record the Project Budget

# 1. Define the Project

## Set A - Details

### Summary Section

|                     |  |
|---------------------|--|
| Name                | Employee Hardware Refresh  |
| Description         | Provide employees with current technology that will allow seamless mobility. |
| Department          | Select from the list 🔍   |
| Scheduled Finish    | Locked field 🔒 – will automatically update from the schedule                 |
| Target Finish       | Select a date from the date picker 📅   |
| Investment Category | Transform  |
| Location            | Sydney NSW   |
| Project Type        | Select from the list 🔍   |

### Business Case Section

|                    |  |
|--------------------|--|
| Problem Statement  | Employee Hardware is obsolete, cumbersome, and tethers employees to their office desks |
| Business Benefits  | Employee efficiency gains; customer retention, increased revenue                       |
| Proposal Costs     | \$550,000.00   |
| Financial Benefits | \$1,800,000.00   |
| ROI                | Locked field 🔒 – will automatically calculate once form is saved                       |

### Header Section




|                   |  |
|-------------------|--|
| Status            | Active   |
| Portfolio/Program | Associate the project to a portfolio or a program record if any  |
| Project Manager   | Your name as the creator of the new project will appear here by default, you may change if required, however for training purposes retain your name. |

## Set B - Details


### Summary Section

|             |  |
|-------------|--|
| Name        | Application SaaS Migration   |
| Description | Determine which core applications can be migrated to SaaS and migrate each in a phased approach. |
| Department  | Select from the list 🔍   |

## Set A - Details

|                     |  |
|---------------------|--|
| Scheduled Finish    | Locked field  – will automatically update from the schedule |
| Target Finish       | Select a date from the date picker                          |
| Investment Category | Run  |
| Location            | Melbourne Vic  |
| Project Type        | Select from the list                                        |

## Business Case Section


|                    |  |
|--------------------|--|
| Problem Statement  | All our core applications are currently hosted on-prem. This requires a large data centre and a significant expense budget to maintain it. In addition, 80% of our core applications are several versions behind with some no longer supported.  |
| Business Benefits  | Reduced datacentre footprint; reduced expense budget; reduced hours spent on support allowing the technical team to focus on projects; guaranteed to keep applications up to date going forward; improved end user efficiency with newer features and functionality; decommissioning of workaround solutions that had become permanent |
| Proposal Costs     | \$1,800,000.00   |
| Financial Benefits | \$5,000,000.00   |
| ROI                | Locked field  – will automatically calculate once form is saved   |


## Header Section


|                   |  |
|-------------------|--|
| Status            | Active   |
| Portfolio/Program | Associate the project to a portfolio or a program record, if relevant  |
| Project Manager   | Your name as the creator of the new project will appear here by default, you may change if required, however for training purposes retain your name. |

## 2. Capture Key Dates


### Set A


|             |  |
|-------------|--|
| Name        | Currency Exchange Capability Available   |
| Date        | Select a date from the date picker  |
| Description | The ability to accept foreign currency seamlessly in our sales application   |
| Status      | ◆ High Risk  |


|             |  |
|-------------|--|
| Name        | Financial True-up  |
| Date        | Select a date from the date picker  |
| Description | Semi-annual financial review and reallocation of portfolio finances  |
| Status      | ◆ High Risk  |

|             |  |
|-------------|--|
| Name        | Improved Employee Morales  |
| Date        | Select a date from the date picker  |
| Description | Measurable improvement to employee morale  |
| Status      | ▲ At Risk  |

### Set B

|             |  |
|-------------|--|
| Name        | Employee Survey  |
| Date        | Select a date from the date picker  |
| Description | Initial draft of employee survey of new projects   |
| Status      | ▲ At Risk  |



|             |  |
|-------------|--|
| Name        | Realised Revenue   |
| Date        | Select a date from the date picker  |
| Description | Forecasted revenue from the Driver Awareness Program realised  |
| Status      | ▲ At Risk  |



|      |  |
|------|--|
| Name | Quarterly Revenue Review   |
| Date | Select a date from the date picker  |



|             |                                 |
|-------------|---------------------------------|
| Description | Review ROI across the portfolio |
| Status      | ● Not Set                       |

### 3. Identify Deliverables

#### Set A

|                 |  |
|-----------------|--|
| Name            | Vendor Onboarding Packet   |
| Description     | Complete packet of forms, agreements, policies, and procedures   |
| Category        | Process Optimisation   |
| Assigned To     | Select your name or another user from the list  |
| Due Date        | Select a date from the date picker                |
| Status          | In Progress  |
| Progress Update | The materials for the packet are in progress   |

|                 |  |
|-----------------|--|
| Name            | Office Furniture Installed   |
| Description     | All office furniture and equipment installed at Chicago Campus   |
| Category        | Other  |
| Assigned To     | Select your name or another user from the list  |
| Due Date        | Select a date from the date picker                |
| Status          | In Progress  |
| Progress Update | Vendor assures us that that the furniture will be delivered on time  |

|                 |  |
|-----------------|--|
| Name            | Swag Bag   |
| Description     | Vendors are contributing items to give to our employees  |
| Category        | Cost Savings   |
| Assigned To     | Select your name or another user from the list  |
| Due Date        | Select a date from the date picker                |
| Status          | In Progress  |
| Progress Update | We have finalised our vendor list and sent initial requests  |

#### Set B

|             |  |
|-------------|--|
| Name        | Mobile App Requirements Document                           |
| Description | Maintain a document of the requirements for audit purposes |

|                 |  |
|-----------------|--|
| Category        | Process Optimisation                             |
| Assigned To     | Select your name or another user from the list 🔍 |
| Due Date        | Select a date from the date picker 📅             |
| Status          | In Progress                                      |
| Progress Update | We are just beginning the process                |

|                 |   |
|-----------------|---|
| Name            | Meeting Handouts  |
| Description     | A packet consisting of the meeting schedule, session agendas, and other event details |
| Category        | Other   |
| Assigned To     | Select your name or another user from the list 🔍                                      |
| Due Date        | Select a date from the date picker 📅  |
| Status          | Completed   |
| Progress Update | Meeting hand-outs have been printed and distributed                                   |

|                 |   |
|-----------------|---|
| Name            | Analysis Report of the Current HW, SW, and Comm                   |
| Description     | Complete analysis to determine what new features will be required |
| Category        | Process Optimisation  |
| Assigned To     | Select your name or another user from the list 🔍                  |
| Due Date        | Select a date from the date picker 📅                              |
| Status          | In Progress   |
| Progress Update | Expect to begin as planned in project                             |

4.Record the Project Budget

Set A

|                      |                                      |
|----------------------|--------------------------------------|
| Name                 | Hardware Budget                      |
| Financial Category   | Select from the list 🔍               |
| Amount to Distribute | \$900,000,000                        |
| Start Date           | Select a date from the date picker 📅 |
| Number of Months     | 12                                   |


|                      |                                      |
|----------------------|--------------------------------------|
| Name                 | Labour Budget                        |
| Financial Category   | Select from the list 🔍               |
| Amount to Distribute | \$850,000                            |
| Start Date           | Select a date from the date picker 📅 |
| Number of Months     | 12                                   |

Set B

|                      |                                      |
|----------------------|--------------------------------------|
| Name                 | Software Budget                      |
| Financial Category   | Select from the list 🔍               |
| Amount to Distribute | \$900,000,000                        |
| Start Date           | Select a date from the date picker 📅 |
| Number of Months     | 12                                   |

|                      |                        |
|----------------------|------------------------|
| Name                 | Travel Budget          |
| Financial Category   | Select from the list 🔍 |
| Amount to Distribute | \$850,000              |



Start Date                      Select a date from the date picker 

Number of  
Months                      12