

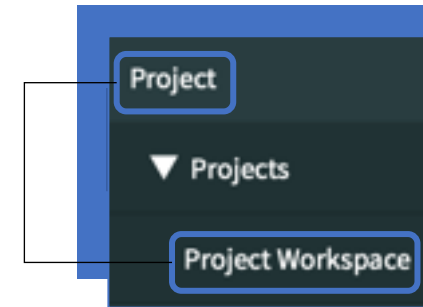


Using the Project Workspace

Quick Reference Guide

Creating a Business Case

- Project Managers can use **Project Workspace** to define, plan, track and monitor a project in a single location. PMs can also review status, exceptions and KPIs in the Workspace to take further actions for the project.
- My Projects Space displays projects as cards based on filter criteria. The workspace contains up to 200 most recently updated projects. Clicking a card opens the project in the project workspace on the **Analytics** tab.

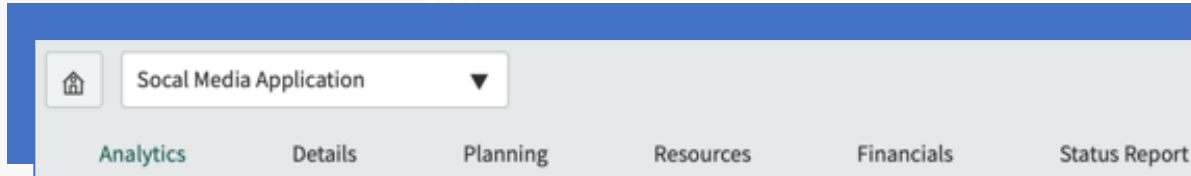


The screenshot displays the 'My Projects Space' interface. At the top, there's a header with the title 'My Projects Space' and a 'New Project' button. Below the header, a filter bar shows the current filter: 'Parent is empty > Active = true > Project manager = Paul Martin (Project Mgr)'. Two project cards are visible:

- Social Media Application**
2019-02-14 (A) • 2019-07-07
Work in Progress
Status: Red, Percent complete: 42.38%, Phase: Executing
Updates: 2 Risks, 3 Issues, 0 Actions, 15 Delayed tasks
Last missed milestone: 2019-06-20 - Execution Complete
- Idea pipeline management**
2019-01-15 (A) • 2019-06-07
Work in Progress
Status: Green, Percent complete: 85.71%, Phase: Executing
Updates: 0 Risks, 0 Issues, 0 Actions, 6 Delayed tasks
Last missed milestone: No last missed milestone

A callout box with an arrow pointing to the filter bar contains the text: 'To see only your projects, set the filter to display projects where Project Manager is <your name>'.

Creating a Business Case



The **Analytics** tab provides analytics on project aspects such as open risks, open issues, delayed milestones. You can also test progress on sprints and stories.

The **Details** tab opens the project form and enables you to define important aspects of the projects.

The **Planning** tab opens the project in the Planning Console. The tab also enables you to navigate to Project Workbench. Within the workbench you can also manage the agile process (stories, test phases and tasks)

The **Resources** tab enables you to find resources, create and manage the resource plans for the project and project tasks. The tab is only available to the project manager.

The **Financials** tab displays breakdowns of cost components of a project planned cost, estimated returns, allocated budget, cost plans and benefit plans. You can create and manage baselines from this tab to track changes occurring during the execution of the project.

The **Status Report** tab displays the project status report.