



Basic Project Creation via a Custom Action

This worksheet is a supplement to Kolme University's Basic Project Creation via a Custom Action. In this course, we are solving the business need of – I need a more controlled way to manage the creation of a new project, than what is provided to me in out-of-the-box add/edit forms.

Basic Project Creation via a Custom Action Steps:

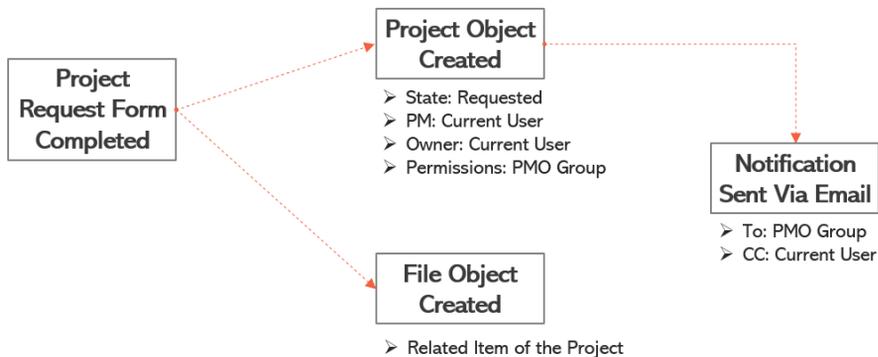
- Configure a Project Request Form.
- Test & Confirm the Project Object has been created successfully per the configuration.
- Test & Confirm the File Object has been created and related to the Project Object
- Configure the notification email.
- Test & Confirm the email is sent successfully to the correct audience.

Prerequisites

AdaptiveWork Environment

- ✓ AdaptiveWork environment - Sandbox recommended
- ✓ AdaptiveWork administrative access
- ✓ Usage quota allowing for one custom action
- ✓ One user group in your system
- ✓ Basic AdaptiveWork Technical Skills
- ✓ You have completed the AdaptiveWork foundation training.

Configuration Diagram:



Components Configuration Lists

Configuration Type	Name	Purpose
Organizational Custom Action	New Project Intake Form	Creates a new project object in the system, attaches a file, and sends a notification email to a specified audience.



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Use this section during the “Stop and Reflect” portion of the course to fill in your answers:

What user input fields would your stakeholders prefer? How many is too many?

➤ _____

What would be the desired state for the Project Object to be set to within the configuration?

➤ _____

What enhancements to the Project Request Form configuration would be best for your stakeholders? What feedback have you heard before?

➤ _____

What Departments (User Groups) would be the best to receive a notification at your company? Do different departments require different forms and/or notifications?

➤ _____

What other information would be beneficial for them to receive in the email? Is the email going to licensed users?

➤ _____

Need Help?

Looking to learn more with these or other AdaptiveWork configurations? Check out our additional Kolme University courses and learning paths to gain in-depth knowledge or engage our experts: PPMAnswers@Kolmegroup.com

About Kolme University

Kolme University is the educational branch of Kolme Group, a team of experienced project and portfolio consultants who will help you triumph ahead of schedule.

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