

Overview

This Job Aid defines the steps to follow for finalising the project plan. This Job Aid assumes that a new project, complete with the appropriate support details, has been created in the platform and that the project schedule has been defined.

The following are six (6) core actions required for finalising the project plan. These need not be sequential actions and you may skip some based on your project delivery requirements.

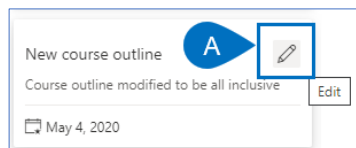
1. Validate Key Dates and Deliverables.
2. Define the Financial forecast.
3. Update resource requests.
4. Create the project baseline.
5. Advance the project to the next stage.
6. Add the project to Microsoft Teams.

Validate Key Dates and Deliverables

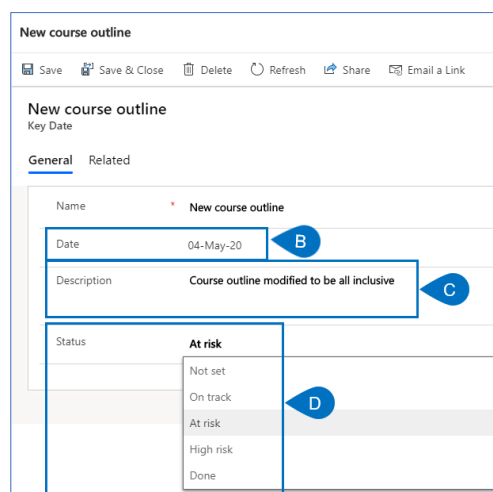
 Project Manager  Projects – Key Dates and Deliverables tabs

1. UPDATE KEY DATES

- a. From the **Information Grouping** tab, open the **Key Dates** tab for the project and compare the approved dates to the current Project for the web schedule. If the approved Key Date is different than project schedule, select the **pencil** icon (or double click the Key Date card).



- b. Update the **Date** to reflect the current schedule.
- c. Add any additional details in the **Description** field to better describe the new key date.
- d. Set the **Status** as appropriate based on how much the date has changed from the original expectation.

A screenshot of the 'New course outline' form. The form has a header with 'New course outline' and a 'Key Date' label. Below the header are tabs for 'General' and 'Related'. The 'General' tab is active. The form contains four main fields: 'Name' (with value 'New course outline'), 'Date' (with value '04-May-20'), 'Description' (with value 'Course outline modified to be all inclusive'), and 'Status' (with a dropdown menu open showing options: 'Not set', 'On track', 'At risk', 'High risk', and 'Done'). Blue circles labeled A, B, C, and D highlight the 'Name', 'Date', 'Description', and 'Status' fields respectively.

2. UPDATE DELIVERABLES

- From the **Tracking Grouping** tab, open the **Deliverables** tab for the project and compare the approved dates to the current Project for the web schedule. If the approved Deliverable date is different than the project schedule, select the **Deliverable** row.
- Click **Edit** (or double click the Deliverable name).

✓ Name	Category	Assigned To	Due Date	Status Reason
✓ Completion Certificate	Other	Doug Brown	24-Apr-20	Not Started

- Update the **Due Date** to reflect the current schedule.
- Add any additional details in the **Progress Update** field to better describe the status of the deliverable.

Training Completion Certificate
 Deliverable

Driver awareness training refresh
 Project

General | Related

Name * **Training Completion Certificate**
 Description ---
 Progress Update ---

Category **Other**
 Assigned To **Doug Brown**
 Due Date **24-Apr-20**
 Status **Not Started**

Define the financial forecast



Project Manager



Projects – Financials tab

1. CREATE THE PROJECT FORECAST

- From the **Information Grouping** tab, Click the **Financials** tab.
- Click **+ New Cost**.

Composite track engineering study
 Project

Active Status | Portfolio | Program | **Albert Connell**
 Project Manager

Major Project
 Active for 10 days

Planning (10 D) | Execution | Closing

Details | Key Dates | Deliverables | Tasks | Status Updates | Issues | Risks | **Financials**

Timeline | Key dates | Zoom | Month | Refresh | **+ New Cost**

Years	Months	Jul	Aug	Sep	Oct	Nov	Dec	Jan
2020/2021								
✓ Budget	\$50K		\$3K	\$20K	\$12.5K	\$14.5K		
✓ Forecast	\$0							
✓ Actual	\$0							
✓ Variance	\$50K		\$3K	\$20K	\$12.5K	\$14.5K		

- Complete the **New Cost** form. The **Name** and **Financial Category** are mandatory.

- d. Click the **Generate Transactions** button.

New Cost

Please complete all required fields and ensure at least one valid transaction is present.

Name *

Financial Category *

Look for Financial Category... click to show available options

Department

Note

Transactions

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

Generate Transactions + Add Transaction

Date	Forecast	Actual	Note
	\$	\$	
Total:	\$0.00	\$0.00	

Save and Close Cancel

- e. Enter the **Amount to distribute** and the forecast **Start date** and **Number of months**.

- f. Next, click **Generate** to have the forecast spread across the desired dates.

Generate Transactions

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

Amount to distribute

\$ 65000

Start date

Tue Sep 01 2020

Number of months

4

months

Generate Cancel

- g. **Edit** any individual monthly amount to **contour the forecast**.
- h. Click **+ Add Transaction** to add additional months to the forecast.
- i. Enter the **Date** and **Forecast**.

Transactions

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

Generate Transactions + Add Transaction

Date	Forecast	Actual	Note
01-Sep-20	\$ 16250	\$	
01-Oct-20	\$ 16250	\$	
01-Nov-20	\$ 16250	\$	
01-Dec-20	\$ 16250	\$	
	\$		
Total:	\$65,000.00	\$0.00	

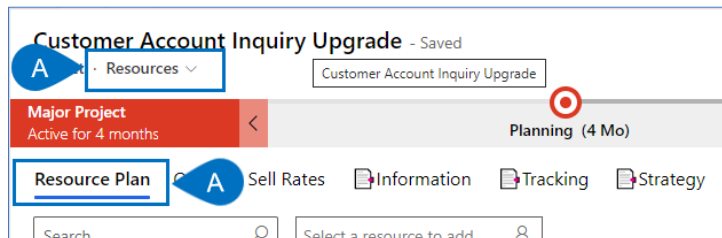
Update resource requests

 Project Manager

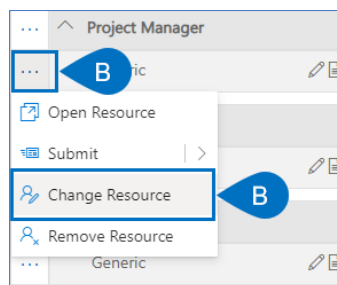
 Projects - Resource Plan tab

1. REPLACE PROPOSAL GENERIC RESOURCES WITH NAMED RESOURCES

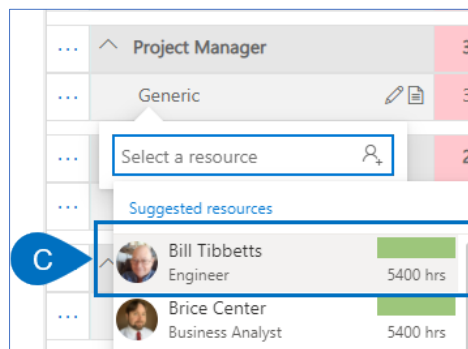
- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- b. Select the **ellipsis (...)** to the left of the **Generic Resource** name and select **Change Resource**.



- c. Select the **approved named resource** who will be assigned to your project. The **Resource Heatmap** to the right of each resource will help you **confirm the resource has availability** to work on your project.

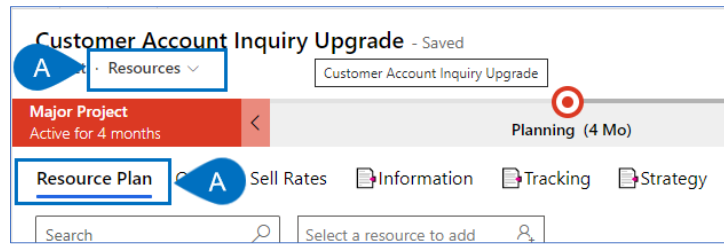


- d. Review and update the **Proposed values** per time-period to ensure they reflect the **current project requirements**.

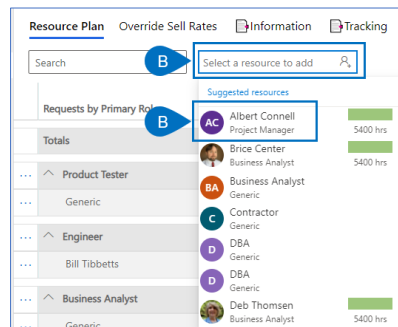
Requests by Primary Role	Visible Period Total ←		April 2022			May 2022			June 2022			July 2022			August 2022		
	P	C	P	C	A	P	C	A	P	C	A	P	C	A	P	C	A
Totals	725.0	0.0	75.0		168.0	175.0		176.0	175.0		176.0	175.0		168.0	125.0		184.0
^ Engineer	300.0	0.0	75.0		168.0	75.0		176.0	75.0		176.0	50.0		168.0	25.0		184.0
Bill Tibbetts	300.0				168.0	75		176.0	75		176.0	50		168.0	25		184.0

2. DEFINE NEW NAMED PROJECT RESOURCE REQUESTS

- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- b. Search for and select the **additional approved named resource** who will be assigned to your project.

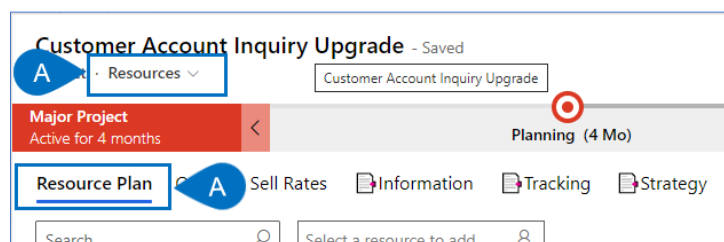


- c. On a time-period basis, define the **number of hours** you require this new resource on your project.

Requests by Primary Role	Visible Period Total ←		June 2022			July 2022			August 2022			September 2022		
	P	C	P	C	A	P	C	A	P	C	A	P	C	A
Totals	1,060.0	0.0	100.0		352.0	200.0		336.0	350.0		368.0	285.0		352.0
Product Tester	375.0	0.0			0.0			0.0	150.0		0.0	150.0		0.0
Generic	375.0								150			150		
Project Manager	85.0	0.0	25.0		176.0	25.0		168.0	25.0		184.0	10.0		176.0
Albert Connell	85.0		25		176.0	25		168.0	25		184.0	10		176.0

3. SUBMIT PROJECT RESOURCE REQUESTS

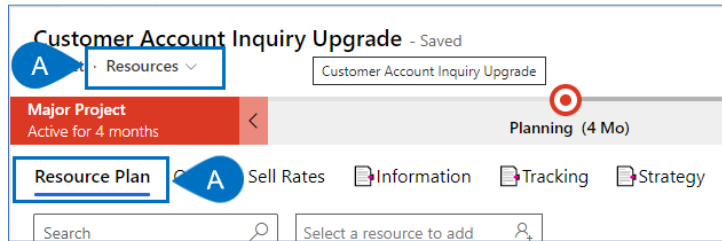
- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- b. Select Save and Submit at the bottom of the form to make all the resource request changes available to the appropriate resource managers.

4. ADJUST PROJECT BASED ON RESOURCE REQUEST REVIEW RESULTS

- a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



- b. Review the **approved resource requests** to identify any changes by Resource Management and be prepared to **adjust the project schedule** and/or **submit additional resource requests** as appropriate.

...	Project Manager	85.0	25.0	15.0	161.0	25.0	30.0	138.0	25.0	30.0	154.0	10.0	10.0	166.0
...	Albert Connell	85.0	25	15.0	161.0	25	30.0	138.0	25	30.0	154.0	10	10.0	166.0

Create the project baseline



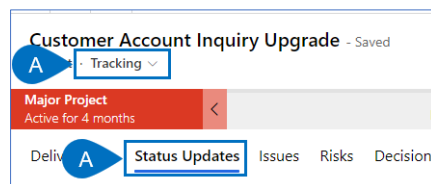
Project Manager



Projects – Status Updates

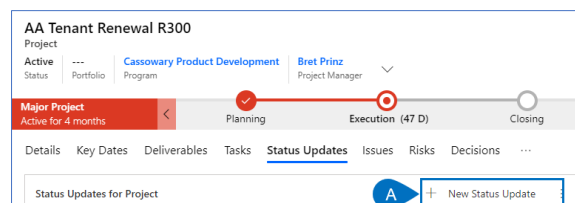
1. CREATE THE PROJECT BASELINE

- a. From the **Tracking Grouping** tab, open the **Status Updates** tab.



2. SET KPIS AND RECORD STATUS NARRATIVE

- b. On the **Status Updates** tab for the current project, click **+ New Status Update**.



- c. Create a **new project status update** to reflect the initiation of the new project and to **set the project baseline**. Ensure that the **Is Baseline** is set to **Yes**. Ensure the Status Date is set to reflect the project initiation date.

New Status Update - Unsaved

Program

Eagle Mobile Phone Sync

Project

KPI Status

General

Status Date

2020-06-15

20-04-06

Start Date

206 days

Duration

0 hrs

Remaining Work

Is Baseline

Yes

Status

Project Approval Status Baseline.

KPI

On Track

On Watch

Troubled

- d. Set the KPI and provide a status narrative for the other relevant status areas based on your project stakeholders' information requirements.

The screenshot shows the 'New Status Update' form. It has a top bar with 'New Status Update' and a user profile. The form is organized into a grid of sections, each with a KPI field and a status dropdown. The sections are: General (Status Date, Created By, Created On), Project (Project KPI, Project Status), Deliverables (Deliverables KPI, Deliverables Status), Schedule (Schedule KPI, Schedule Status), Financials (Financials KPI, Financials Status), Work (Work KPI, Work Status), Issues (Issues KPI, Issues Status), Risks (Risks KPI, Risks Status), and Change Requests (Change Requests KPI, Change Requests Status). A blue circle with the letter 'D' is positioned over the 'Project Status' dropdown menu.

Advance the project to the next stage



Project Manager



Projects


1. ADVANCE THE PROJECT

- a. Click on the current stage, which is identifiable by the **red dot/red circle** icon.
- b. Validate that you have completed all the **checklist items**.
- c. Next click **Next Stage** to advance the project.

The screenshot shows the 'Planning (10 D)' stage. At the top, there's a stage header with a red target icon and the text 'Planning (10 D)'. Below it, it says 'Active for 10 days'. A checklist is displayed with three items: 'Detail scope and schedule completed?' (marked Complete), 'Project setup in MS Teams completed?' (marked Complete), and 'Target Finish Date' (30-Nov-20). At the bottom, there's a blue button labeled 'Next Stage' with a right arrow. Three blue callout circles are present: 'A' points to the stage header, 'B' points to the checklist, and 'C' points to the 'Next Stage' button.

Create a Microsoft Teams Channel for the project

 Project Manager

 the platform

1. SETUP TEAMS

- Open Microsoft Teams and, select the platform app from the navigation pane on the left.
- Ensure you are on the **Projects** tab.
- Select the **Teams** icon for your new project. This will create the appropriate Team and Channel and then open it in Teams.

