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.

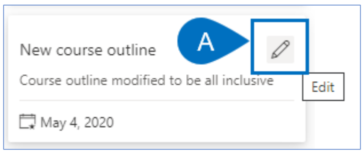
1. Validate Key Dates and Deliverables.
2. Define the Financial forecast.
3. Update resource requests.
4. Create the project baseline.
5. Advance the project to the next stage.
6. Add the project to Microsoft Teams.

Validate Key Dates and Deliverables

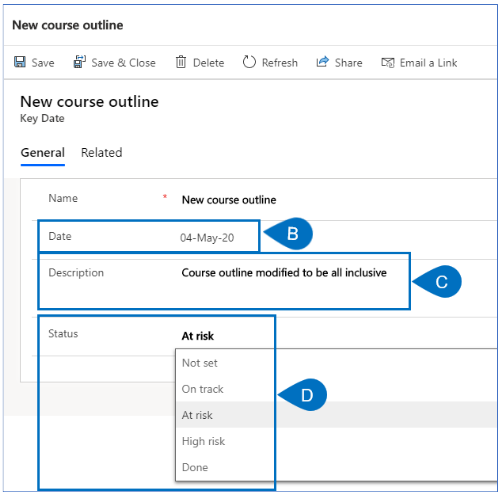
Project Manager | Projects – Key Dates and Deliverables tabs

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).

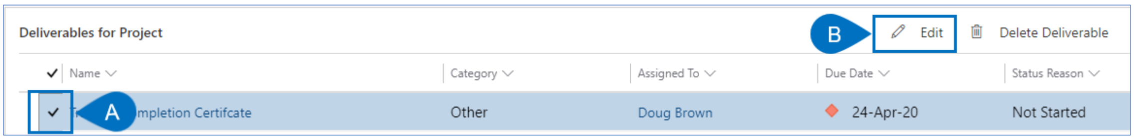


b. Update the **Date** to reflect the current schedule.
c. Add any additional details in the **Description** field to better describe the new key date.
d. Set the **Status** as appropriate based on how much the date has changed from the original expectation.

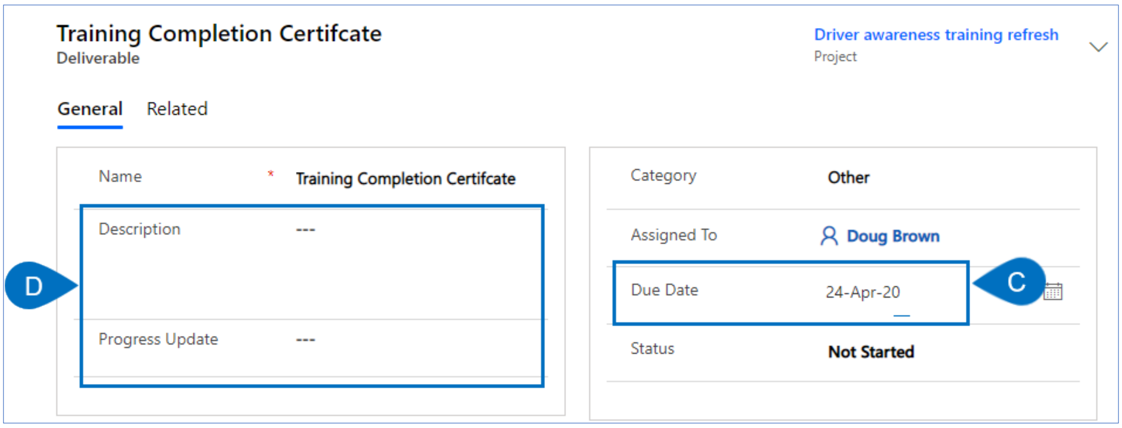


2. UPDATE DELIVERABLES

a. 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.
b. Click **Edit** (or double click the Deliverable name).



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

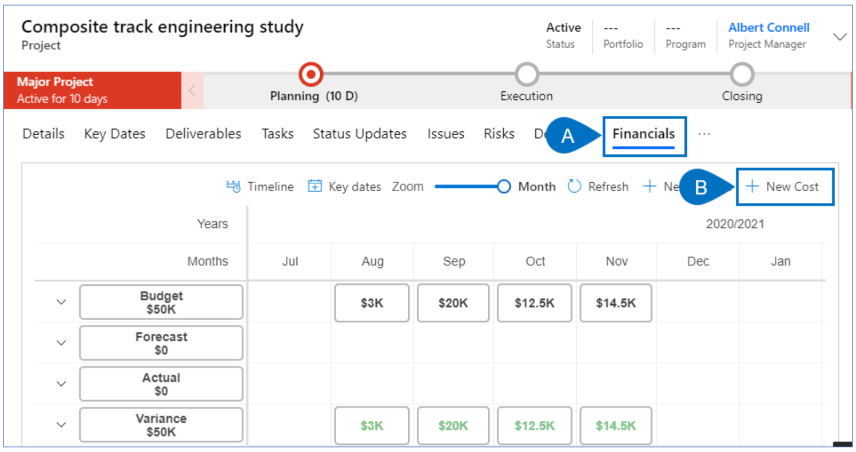


Define the financial forecast

Project Manager | Projects – Financials tab

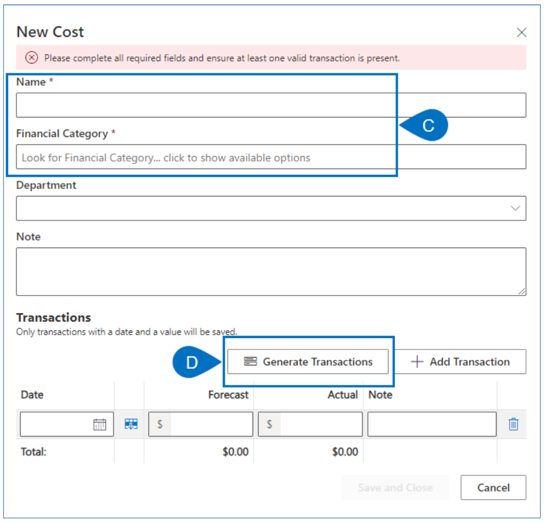
1. CREATE THE PROJECT FORECAST

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

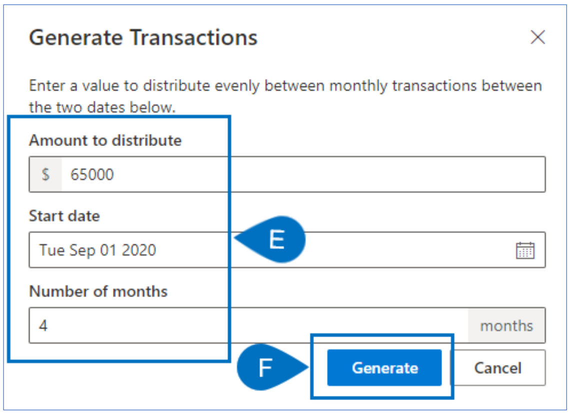


c. Complete the **New Cost** form. The **Name** and **Financial Category** are mandatory.

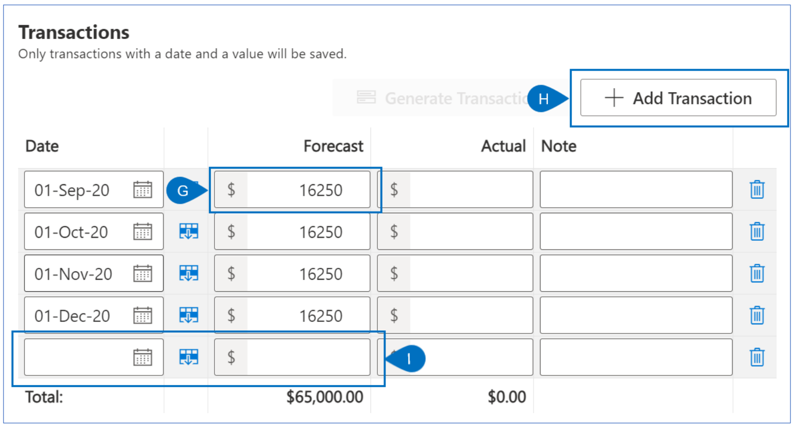
d. Click the **Generate Transactions** button.



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.



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.**

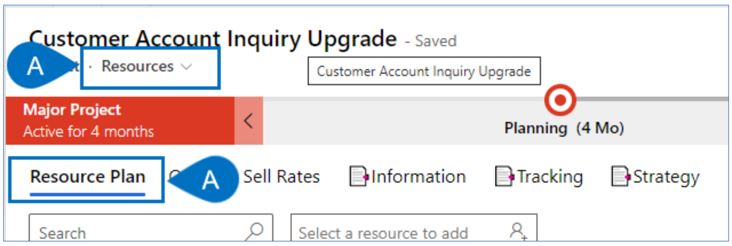


Update resource requests

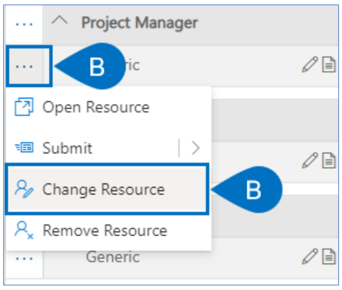
Project Manager | Projects - Resource Plan tab

1. REPLACE PROPOSAL GENERIC RESOURCES WITH NAMED RESOURCES

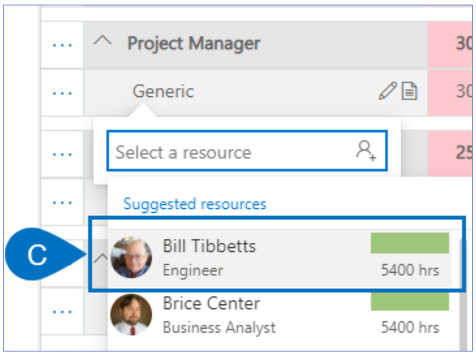
a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



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.

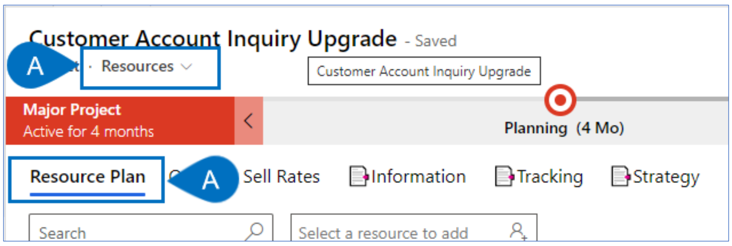


d. Review and update the **Proposed values** per time-period to ensure they reflect the **current project requirements.**

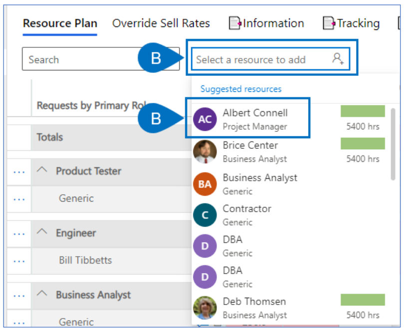
Requests by Primary Role	Visible Period Total		April 2022			May 2022			June 2022			July 2022			August 2022		
	P	C	P	C	A	P	C	A	P	C	A	P	C	A	P	C	A
Totals	725.0	0.0	75.0		168.0	175.0		176.0	175.0		176.0	175.0		168.0	125.0		184.0
Engineer	300.0	0.0	75.0		168.0	75.0		176.0	75.0		176.0	50.0		168.0	25.0		184.0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

2. DEFINE NEW NAMED PROJECT RESOURCE REQUESTS

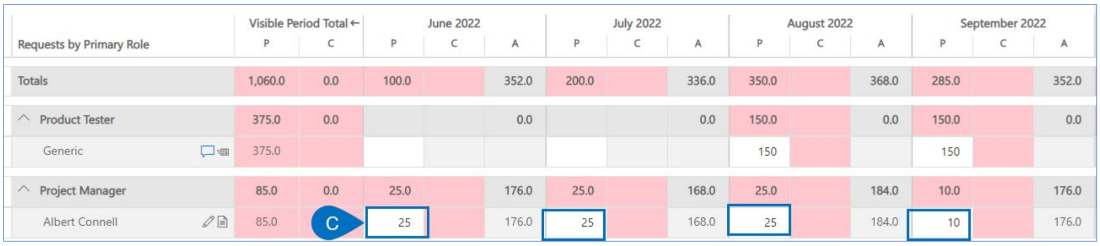
a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



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



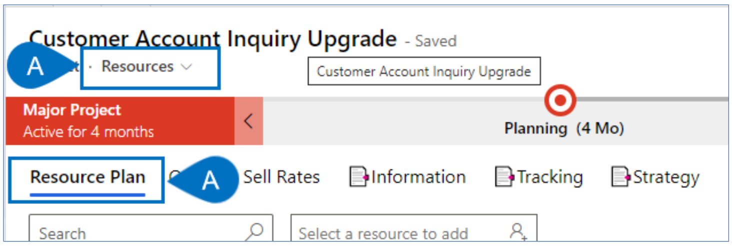
c. **On a time-period basis**, define the **number of hours** you require this new resource on your project.



Requests by Primary Role	Visible Period Total P	Visible Period Total C	June 2022 P	June 2022 C	June 2022 A	July 2022 P	July 2022 C	July 2022 A	August 2022 P	August 2022 C	August 2022 A	September 2022 P	September 2022 C	September 2022 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	C	25		176.0	25		168.0	25		184.0	10		176.0

3. SUBMIT PROJECT RESOURCE REQUESTS

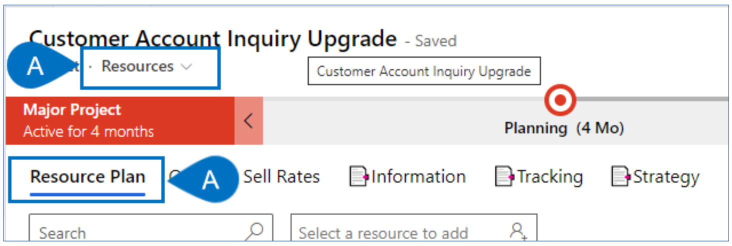
a. From the **Resources Grouping** tab, open the **Resource Plan** tab.



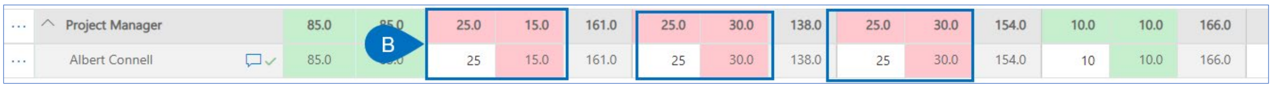
b. Select Save and Submit at the bottom of the form to make all the resource request changes available to the appropriate resource managers.

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.



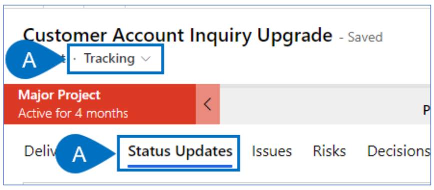
Create the project baseline

Project Manager

Projects – Status Updates

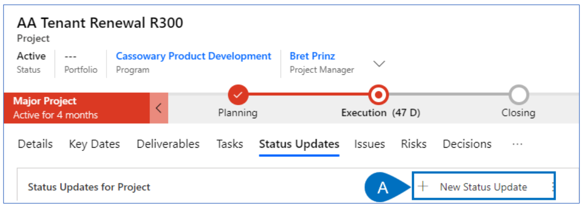
1. CREATE THE PROJECT BASELINE

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

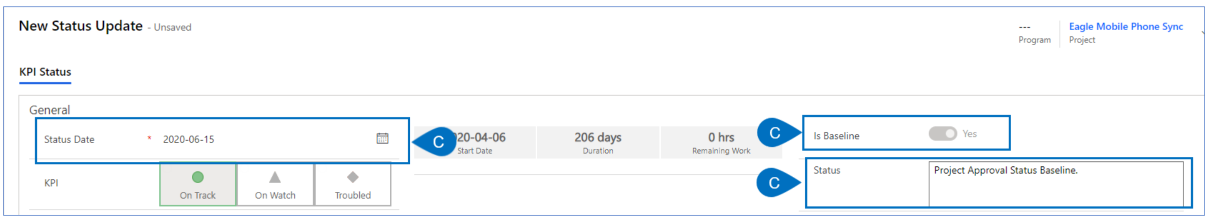


2. SET KPIS AND RECORD STATUS NARRATIVE

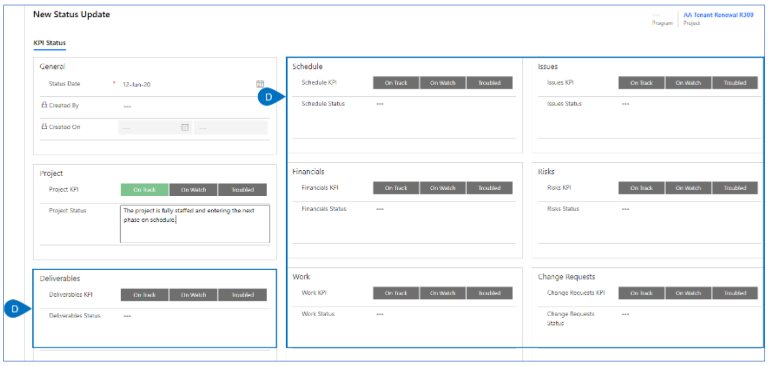
b. On the **Status Updates** tab for the current project, click **+ New Status Update.**



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.



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



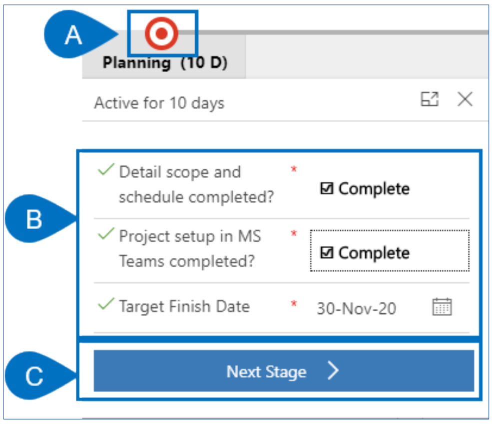
Advance the project to the next stage

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.



Create a Microsoft Teams Channel for the project

Project Manager | the platform

1. SETUP TEAMS

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