

Overview

This Job Aid defines the steps to follow for tracking progress on an active project. 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 seven (7) core actions required for finalising the project plan. These are not sequential actions, and you may skip some based on your project delivery requirements.

1. Update schedule.
2. Validate key dates and deliverables.
3. Monitor project dates and artifacts.
4. Update project costs.
5. Align project resource requests to the project schedule.
6. Set KPIs and compose status narratives.
7. View and verify project status report.

Update schedule



Project Manager



Project execution tool

1. TRACK TASK PROGRESS

- a. Ensure the project tasks are current and update as appropriate for the tracking method based on your project execution tool.

Validate key dates and deliverables



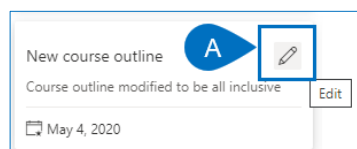
Project Manager



Projects – Key Dates and Deliverables tabs

1. UPDATE KEY DATES

- a. Open the **Key Dates** tab for the current project and compare the approved dates to the current 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.

New course outline

Save Save & Close Delete Refresh Share Email a Link

New course outline
Key Date

General Related

Name * New course outline

Date 04-May-20 **B**

Description Course outline modified to be all inclusive **C**

Status **At risk** **D**

Not set
On track
At risk
High risk
Done

2. UPDATE DELIVERABLES

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

Deliverables for Project **B** Edit Delete Deliverable

✓	Name	Category	Assigned To	Due Date	Status Reason
✓ A	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 **Description and Progress Update** fields to better describe the deliverable status.

Training Completion Certificate
Deliverable

Driver awareness training refresh Project

General Related

Name * Training Completion Certificate

Description --- **D**

Progress Update ---

Category Other

Assigned To Doug Brown

Due Date 24-Apr-20 **C**

Status Not Started

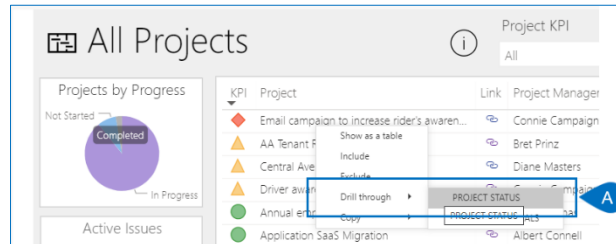
Monitor project dates and support items

Project Manager

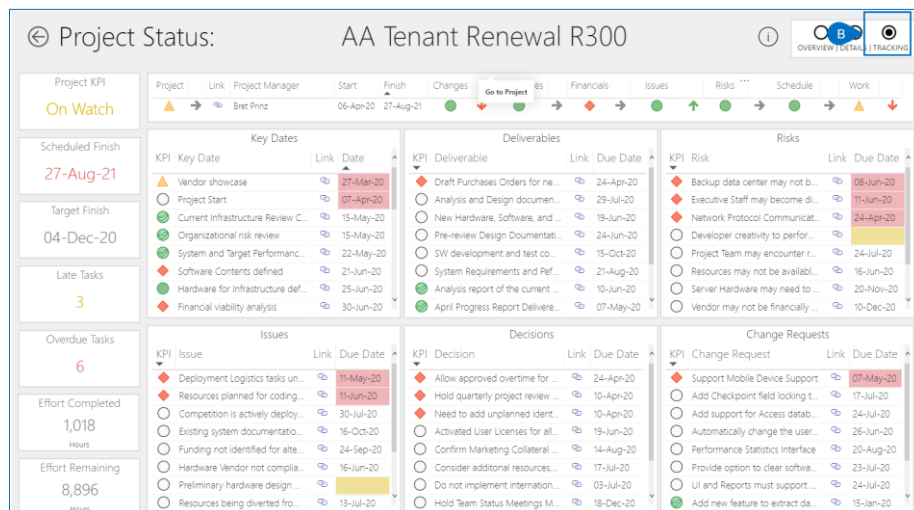
Projects – Insights – All Projects

1. REVIEW PROJECT PERFORMANCE

a. Right-mouse click on the current project and click Drill through and then select **Project Status**.

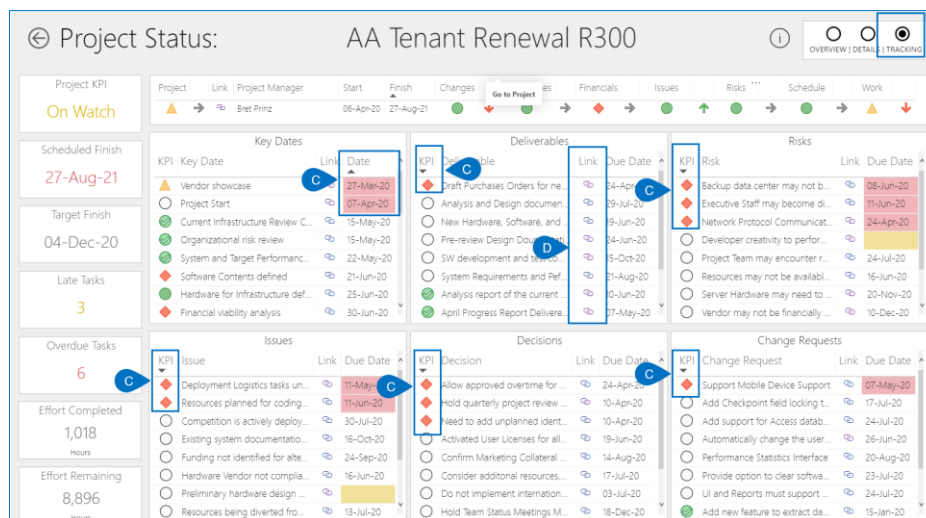


b. Click on the Tracking radio button.



c. Review each section of this report to identify late dates and artifacts. The default sort in each list is by KPI ensuring the troubled items are visible at the top of the list.

d. Click the link icon to access the details of an item to take corrective actions and rectify project delivery challenges.



Update project costs



Project Manager



Projects – Financials tab

1. RECORD ACTUALS AND UPDATE PROJECT FORECASTS

- Open the **Financials** tab for the current project.
- Select the Forecast card for the month you are updating actual costs.

AA Tenant Renewal R300
Project
Active Status Portfolio Casowary Product Development Bret Prinz Project Manager

Major Project Active for 4 months

Details Key Dates Deliverables Tasks Status Updates Issues Financials

Timeline Key dates Zoom Month Refresh + New Budget + New Cost

Years	Months	Jun	Jul	Aug	Sep	Oct
Budget	\$229.4K	\$32K	\$32K	\$12K	\$12K	\$62K
Forecast	\$765.6K	\$528.3K	\$62.3K	\$71.5K	\$11.5K	\$16K
Actual	\$699.4K	\$514K	\$88K	\$0	\$0	\$0
Variance	-\$656.2K	-\$486.3K	-\$20.3K	-\$59.5K	\$500	\$46K

- Enter the actual costs by line.

Cost for Period: September 2020

Search + New Cost

Category/Name	Date	Forecast	Actual	Transaction Note	Budget	Variance
Capex		\$3,500.00	\$0.00		\$8,000.00	\$4,500.00
Hardware	30 Sep 2020	\$ 1000	\$			
Labor - Contract	20 Sep 2020	\$ 1500	\$			
Software	20 Sep 2020	\$ 1000	\$			
Opex		\$8,000.00	\$0.00		\$4,000.00	-\$4,000.00
Labor	30 Sep 2020	\$ 6000	\$			
Travel	30 Sep 2020	\$ 2000	\$			
Totals:		\$11,500.00	\$0.00		\$12,000.00	\$500.00

- Review and update any remaining forecast values to align to the project schedule.

Composite track engineering study
Project
Major Project Active for 29 days

Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions Change Requests Lessons Learned Financials Documents

Timeline Key dates Zoom

Years	Months	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Budget	\$659.2K	\$142.7K	\$142.7K	\$142.7K	\$142.7K	\$142.7K	\$142.7K		
Forecast	\$87.9K	\$128K	\$128K	\$128K	\$128K	\$128K	\$128K	\$128K	
Actual	\$92.5K	\$17.5K	\$79K						
Variance	-\$18.8K	\$142.7K	\$17.7K	\$17.7K	\$17.7K	\$17.7K	\$17.7K	-\$128K	-\$128K

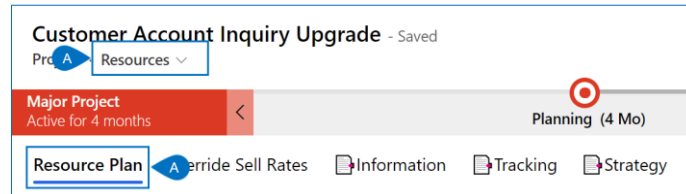
Align project requests to the project schedule

 Project Manager

 Projects

1. UPDATE ENTERPRISE PROJECT RESOURCE REQUESTS

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



- b. Align the resource request to the project schedule by **adjusting the requested hours in the P for Proposed column for each time-period** and **extend the duration** of the requests as needed to align to the project schedule.

Customer Account Inquiry Upgrade - Saved

Project · Resources

Major Project

Active for 4 months

Planning (4 Mo)

Execution

Resource Plan

Override Sell Rates

Information

Tracking

Strategy

Search

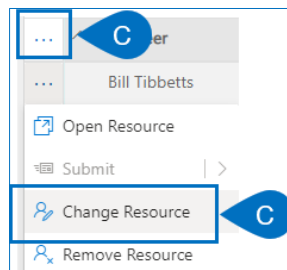
Select a resource to add

June 2022

31

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	1,030.0	100.0	75.0	629.0	200.0	190.0	482.0	350.0	355.0	381.0	285.0	285.0	419.0
Product Tester	375.0	375.0			176.0			168.0	150.0	150.0	34.0	150.0	150.0	26.0
Generic	375.0								150			150		
Tina Hamilton		375.0			176.0			168.0		150.0	34.0		150.0	26.0
Engineer	350.0	320.0	75.0	60.0	116.0	75.0	60.0	108.0	75.0	75.0	109.0	75.0	75.0	101.0
Bill Tibbetts	350.0	320.0	75	60.0	116.0	75	60.0	108.0	75	75.0	109.0	75	75.0	101.0
Business Analyst	250.0	250.0			176.0	100.0	100.0	68.0	100.0	100.0	84.0	50.0	50.0	126.0
Generic	250.0					100			100			50		
Randy Reporter		250.0			176.0		100.0	68.0		100.0	84.0		50.0	126.0
Project Manager	85.0	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	85.0	25	15.0	161.0	25	30.0	138.0	25	30.0	154.0	10	10.0	166.0

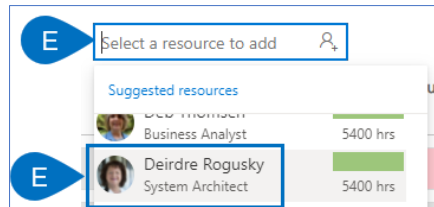
- c. **Replace** an existing resource by clicking the **ellipsis** to the left of the resource to be replaced and select **Change Resource** and search for and select the replacement resource.



- d. **Adjust the hours** required for the replacement resource per time-period in the **P for Proposed** column.

Requests by Primary Role	Visible Period Total ←		June 2022			July 2022			August 2022			September 2022			October 2022		
	P	C	P	C	A	P	C	A	P	C	A	P	C	A	P	C	A
Deliverables	1,060.0	710.0	100.0	15.0	689.0	200.0	130.0	542.0	350.0	280.0	456.0	285.0	210.0	494.0	125.0	75.0	597.0
Product Tester	375.0	375.0			176.0			168.0	150.0	150.0	34.0	150.0	150.0	26.0	75.0	75.0	93.0
Engineer	350.0	0.0	75.0		176.0	75.0		168.0	75.0		184.0	75.0		176.0	50.0		168.0
Nate Auchter	350.0		75		176.0	75		168.0	75		184.0	75		176.0	50		168.0

- e. **Add new resources** as needed by searching for and selecting them using the **second search box**.

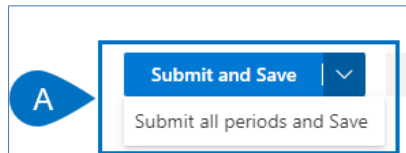


- f. **Define the hours** requested for the new resource per time-period in the **P for Proposed** column.

Requests by Primary Role	Visible Period Total ←		June 2022			July 2022			August 2022			September 2022			October 2022		
	P	C	P	C	A	P	C	A	P	C	A	P	C	A	P	C	A
Totals	1,060.0	710.0	100.0	15.0	865.0	200.0	130.0	710.0	350.0	280.0	640.0	285.0	210.0	670.0	125.0	75.0	765.0
Product Tester	375.0	375.0			176.0			168.0	150.0	150.0	34.0	150.0	150.0	26.0	75.0	75.0	93.0
System Architect	0.0	0.0			176.0			168.0			184.0			176.0			168.0
Deirdre Rogusky	0.0				176.0			168.0			184.0			176.0			168.0

2. SUBMIT PROJECT RESOURCE REQUESTS

- a. Once you have completed all resource request updates, click **Submit and Save** from the bottom right-hand corner of the form. If you have project resource requests that are not currently visible on the form, you should use the drop-down arrow and select **Submit all periods and Save**.



3. ADJUST PROJECT BASED ON RESOURCE REQUEST REVIEW RESULTS

- a. Once the resource managers review and update the resource requests, you should then **review and validate** that all requests have been approved in the **C for Committed** column via the green shading or rejected/changed via the red shading. You should validate that you can be successful delivering the project based on the approved requests or work with your stakeholders and the resource managers to replan the project to satisfy both the project's requirements and the availability of resources to complete the project work.

Requests by Primary Role	Visible Period Total ←		June 2022			July 2022			August 2022			September 2022			October 2022		
	P	C	P	C	A	P	C	A	P	C	A	P	C	A	P	C	A
Totals	1,060.0	1,060.0	100.0	90.0	790.0	200.0	205.0	635.0	350.0	355.0	565.0	285.0	285.0	595.0	125.0	125.0	715.0
System Architect	0.0	0.0			176.0			168.0			184.0			176.0			168.0
Product Tester	375.0	375.0			176.0			168.0	150.0	150.0	34.0	150.0	150.0	26.0	75.0	75.0	93.0
Engineer	350.0	350.0	75.0	75.0	101.0	75.0	75.0	93.0	75.0	75.0	109.0	75.0	75.0	101.0	50.0	50.0	118.0
Nate Auchter	350.0	350.0	75.0		101.0	75		93.0	75		109.0	75		101.0	50		118.0

Set KPIs and compose status narratives



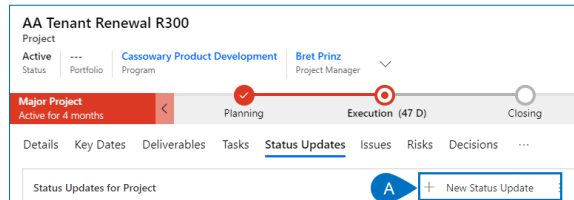
Project Manager



Projects – Status Updates

1. SET KPIS AND RECORD STATUS NARRATIVE

- a. Open the **Status Updates** tab for the current project and click **+ New Status Update**.



- b. Create a new project status update for the current period. Ensure the Status Date is set to reflect the status period end date.
- c. Define the overall project status. Set the Project KPI and provide a clear and concise narrative to describe the status of the project.

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

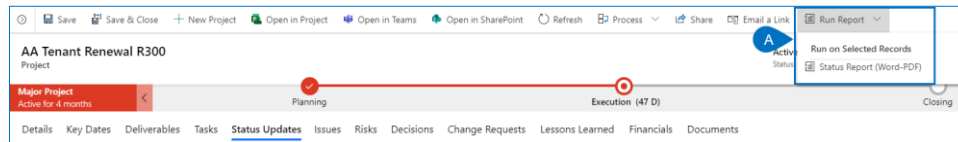
View and verify project status report

 Project Manager

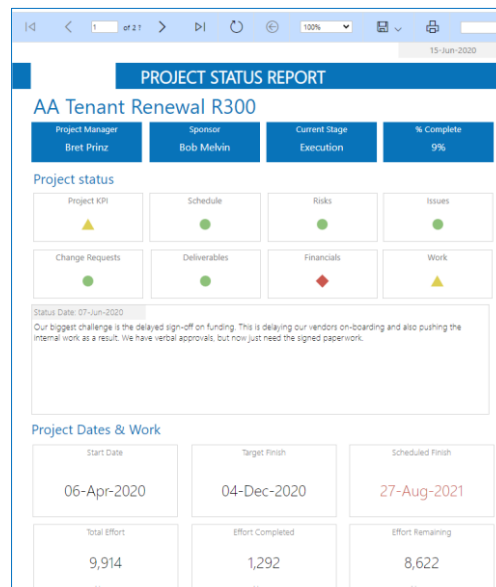
 Projects

1. REVIEW AND VERIFY THE PROJECT STATUS REPORT

- Select **Run Report** from the command bar. Select the appropriate style of status report from the list.

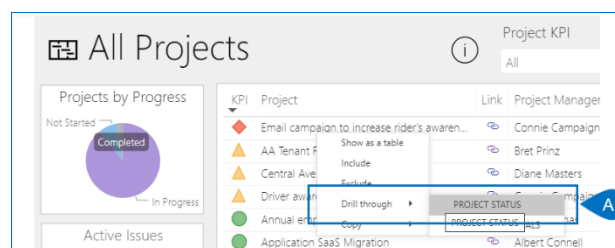


- Review the project status report and validate that the status report delivers the appropriate message to the project stakeholders. If changes are needed, return to the platform and/or the schedule to ensure that the status report is accurate and consistent with the project's status.



2. REVIEW AND VERIFY THE INSIGHTS STATUS REPORT

- From Projects Insights, All Projects report, right mouse click on the current project, click Drill through, and then select **Project Status**.



- b. Review the three pages (Overview, Details, and Tracking) and validate that the status report delivers the appropriate message to the project stakeholders. If changes are needed, return to Projects and/or the schedule to ensure that the status report is accurate and consistent with the project's status.

