

Overview

This Job Aid defines the steps to follow for tracking progress on an active project. This Job Aid is based on the assumption that a new project, complete with the appropriate support details, has been created in Project IQ and that the project schedule has been defined in Project for the web.

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

- 1. Update schedule in Project for the web
- 2. Validate key dates and deliverables
- 3. Monitor project dates and artifacts
- 4. Update project costs
- 5. Set KPIs and compose status narratives
- 6. View and verify project status report

Update schedule in Project for the web

Project Manager

 $\stackrel{\mathcal{P}}{\longrightarrow}$ Project for the web – Project to be updated is open

1. TRACK TASK PROGRESS

a. Mark tasks as complete by clicking in the **circle**, in any view: Grid, Board, or Timeline.



b. Drag and drop a task to the Completed column in the Board/Progress view.

Apr 6, 2020 - Aug 27, 2	021		-		
Not started		In progress		Completed	
+ Add task		+ Add task		+ Add task	
15 days		O Proliminany cot	hunes decises	12 days 100%	
10/27	🚳 🔕 🐇 🗉	п	enere ocenyri	🗇 05/22 🛛 🍪 🐇 🕻	3
O Q3 - 2020 Re Finance 0 days	view Complete	12 days 50%	ه 🕹 😦 🚳	Review software environm	ent
10/19	Ą.		O Preliminary I	lardwäre-Software ··· 🕉 🚳	8
 Evaluate the data center s IT 	design within the pecifications	A	IT 0 days 50%	Review communications environment	
8 days	🚳 😑 🚴 回		10/06	9 days 100%	
Oraft prelimi design docum IT 0 days	nary infrastructure nent Complete			Review current infrastruct Complete IT	ure
				0 days 100%	



c. Ensure the **% complete** column is visible in the Grid view, and enter the updated % complete directly in the column.

Job Aid

	Project						
⟨3	AA T Apr 6, 20	enant Renewal R300 Grid Board Timeline 20 - Aug 27, 2021 —					
~		Name > % complete >					
	12	Review communications environment	0%				
	13 Review current infrastructure Complete						
	14 VIdentify Target Areas for Improvement						
	15	Review hardware - software environment	_				
	16	Review communications environment	0%				

d. In any view, click the **i icon** to open the task details pane and enter the updated status in the **% complete** field.

Identify Target Areas for Improvement Review hardware - software environment										
A. 🚯 🚳 🙁 🐇										
Add a note	Add a note									
Start	Finish									
06/11/2020	06/18/2020									
Duration 6 days	% Complete									
Bucket										

e. Ensure the **Effort completed** and **Effort remaining** columns are visible in the Grid view, and enter the updated **actual and remaining effort** directly in the columns. Updating Effort completed will automatically update Effort remaining based on the total **Effort** for the task. Updating Effort remaining will automatically update the total Effort.

	Project				
=	AA Tenant Rene	wal R300 Grid Board Timeline			
ŵ	Apr 6, 2020 - Aug 27, 2021	—			
~	Name \checkmark		Finish \checkmark	Effort remaining \checkmark	Effort completed \checkmark
	18 O Defi	ie system requirements	6/22/2020	166.4 hours	89.6 hours
	19 O Defi	te target performance metrics	7/8/2020	384 hours	0 hours
	20 O Syste	m Requirements and Target Performance Complete	7/8/2020		
	21 🔿 🗸 🗸 🗸	ew Current Market Solution Vendors	8/19/2020	960 hours	0 hours
	22 O H	ardware vendors	7/16/2020	A 192 hours	0 hours
	23 O So	ftware vendors	7/23/2020	160 hours	0 hours

f. Click the i icon, in any view, to open the task details pane and enter and enter the updated actual and remaining effort directly in the appropriate fields. Updating Effort completed will automatically update Effort remaining based on the total Effort for the task. Updating Effort remaining will automatically update the total Effort.

Identify Target Areas for Improvement Review communications environment A: Image: Areas for Improvement								
Add a note								
Start	Finish							
06/17/2020	06/22/2020							
Duration	% Complete							
3 days	0							
Bucket								
IT \checkmark								
Completed 0 hours B B Completed B Completed B Completed Co	ng Total rs = 96 hours							





Job Aid

0

a. Review the project schedule and update any project milestones that were completed in the current status period. Mark milestones as complete by clicking in the **circle**, in any view: Grid, Board, or Timeline.

	Project	t				
=	AA	Tena	nt Renewal R300	Grid Board Timeline		
ŵ	Apr 6	2020 -)	Aug 27, 2021			
~			Apr 19	Apr 26		May 3
	1	$^{\circ}$	~ AA Tenant Renewal R30	10	-	
	2	۲	Project-Start			
	3	0	~ Scope			
	4	0	Determine project s	cope	8	
	5	5 Secure-project-sponsorship				5
	6	ø	Secure core resourc	es	+2	
	A	0	Scope Complete			

3. RESCHEDULE INCOMPLETE WORK IN THE PAST

a. In the Timeline view, search for light blue Gantt bars to the left of the current date.

-	Project												
=	AA	Tenar	t Renewal R300 Grid	Board Timeline									
ŵ	Apr 6, 2020 - Aug 27, 2021												
~			May 17	May 24		May 31	Jun 7	Jun 14					
	15	9	newew corrent initiastructure	complete				~					
	14	0	✓ Identify Target Areas for Impr	ovement									
	15	0	Review hardware - software e	nvironment	+4								
	16	0	Review communications envir	onment	+4		F						
	17	0	Improvement Target Areas Id	entification Complete				\sim					
	18	0	Define system requirements		+4			✓					
	19	0	Define target performance metr	ics	+4								

b. Drag the timeline bar to reschedule this work to begin (continue) no earlier than the current date.



Validate key dates and deliverables

Project Manager

Project IQ – Key Dates and Deliverables tabs
 Project for the web - Project to be updated is open

1. UPDATE KEY DATES

a. Open the **Key Dates** tab for the current 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.

New	cours	se outline				
屇 Sa	ave	🖁 Save & Close	🗓 Delete	🖔 Refresh	🖄 Share	🖾 Email a Link
Ne _{Key}	W CC Date	ourse outline				
Ger	neral	Related				
	Nam	ie *	New course	e outline		
	Date	2	04-May-20	В		
	Desc	ription	Course out	line modified t	o be all inclus	ive
1	State	ıs	At risk			
			Not set			
			On track			
			At risk			
			High risk			
			Done			

2. UPDATE DELIVERABLES

- a. Open the **Deliverables** tab for the current 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).

Deliverables for Project			B 🖉 Edit	🗓 Delete Deliverable
✓ Name ∨	Category \smallsetminus	Assigned To \checkmark	Due Date \checkmark	Status Reason \smallsetminus
✓ ► A mpletion Certifcate	Other	Doug Brown	🔶 24-Apr-20	Not Started

- c. Update the **Due Date** to reflect the current schedule.
- d. Add any additional details in the **Description and Progress Update** fields to better describe the deliverable status.

1	raining Completion Certifcate			Driver awareness training refresh Project
0	Seneral Related			
	Name * Training Completion Certifcate		Category	Other
	Description	-	Assigned To	
D			Due Date	24-Apr-20
	Progress Update		Status	Not Started
	1			

Monitor project dates and support items

Project Manager

Project IQ – Insights – All Projects

Tracking project progress

1. REVIEW PROJECT PERFORMANCE

Job Aid

IQ

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



b. Click on the Tracking radio button.

⊖ Project	Status:	AA Te	enant Renewal R300				
Project KPI	Project Link Project Manager	Start Fin	ish Changes Gate Burlant les Financials Issue	Risks Schedule Work			
On Watch	🔺 🌩 🔏 Bret Prinz	06-Apr-20 27-	Aug-21 🔍 🔶 🔶 🔶	$\uparrow \bullet \rightarrow \bullet \rightarrow \land \checkmark$			
Scheduled Finish	Key Dates		Deliverables	Risks			
Scheduled Thilan	KPI Key Date	Link Date	KPI Deliverable Link Due Date *	KPI Risk Link Due Dat			
27-Aug-21	A Vendor showcase	© 27-Mar-20	Draft Purchases Orders for ne 24-Apr-20	 Backup data center may not b. 9 08-lup-20 			
	Project Start	© 07-Apr-20	Analysis and Design documen Sec. 29-Jul-20	Executive Staff may become di			
Target Finish	Current Infrastructure Review C	© 15-May-20	New Hardware Software and 19-lun-20	Network Protocol Communicat 24-Apr-21			
04 Dec 20	Organizational risk review	@ 15-May-20	Pre-review Design Doumentati @ 24-Jun-20	Developer creativity to perfor			
04-Dec-20	System and Target Performanc	22-May-20	SW development and test co @ 15-Oct-20	Project Team may encounter r 24-lul-20			
Late Tasks	Software Contents defined	21-Jun-20	System Requirements and Ref 21-Aug-20	Resources may not be availabl 16-lun-20			
Late lasks	Hardware for Infrastructure def	@ 25-Jun-20	Analysis report of the current @ 10-Jun-20	O Server Hardware may need to @ 20-Nov-2			
3	Financial viability analysis	@ 30-Jun-20	April Progress Report Delivere 🐵 07-May-20 *	Vendor may not be financially @ 10-Dec-2			
Overdue Tasks	Issues		Decisions	Change Requests			
overade lasto	KPI Issue	Link Due Date	KPI Decision Link Due Date *	KPI Change Request Link Due Dat			
6	Deployment Logistics tasks un	@ 11-May-20	Allow approved overtime for 24-Apr-20	Support Mobile Device Support @ 07-May-2			
	 Resources planned for coding 	© 11-Jun-20	Hold quarterly project review 🐵 10-Apr-20	Add Checkpoint field locking t 🐵 17-Jul-20			
Effort Completed	Competition is actively deploy	30-Jul-20	Need to add unplanned ident @ 10-Apr-20	Add support for Access datab @ 24-Jul-20			
1,018	Existing system documentatio	16-Oct-20	Activated User Licenses for all @ 19-Jun-20	Automatically change the user 26-Jun-20			
Hours	O Funding not identified for alte	@ 24-Sep-20	🔘 Confirm Marketing Collateral 🤏 14-Aug-20	Performance Statistics Interface 20-Aug-2			
Effort Remaining	O Hardware Vendor not complia	👁 16-Jun-20	O Consider additonal resources, 🤏 17-Jul-20	Provide option to clear softwa 23-Jul-20			
0 006	O Preliminary hardware design	@	O Do not implement internation @ 03-Jul-20	O UI and Reports must support 🐵 24-Jul-20			
0,090	Resources being diverted fro	@ 13-Jul-20	O Hold Team Status Meetings M., @ 18-Dec-20	Add new feature to extract da @ 15-Jan-20			

- 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 in order to take corrective actions and rectify project delivery challenges.

© Project	Ten	ant Renewa	I R.	300		() C) IEW DI			
Project KPI On Watch	Project Link Project Manager ▲ ◆ • Bret Prinz	Start 06-Apr-20	inish 7-Aug-2	Changes Go to Project	Fina	ncials Issu	ies	Risks Schedule	⇒	Work
Scheduled Finish	Key Dates KPI Key Date	Link Date] [Deliverable:	Link	Due Date	КРІ	Risks Risk	Link	Due Date 🔺
27-Aug-21	Vendor showcase	27-Mar-20		Draft Purchases Orders for ne Analysis and Design documen	ବ	24-Apr 29-Jul-20	•	Backup data center may not b Executive Staff may become di	ବ ବ	08-Jun-20 11-Jun-20
04-Dec-20	Current Infrastructure Review C Organizational risk review System and Target Performanc	 15-May-20 15-May-20 22-May-20 		New Hardware, Software, and . Pre-review Design Dougent. SW development and terror.	ବ	19-Jun-20 24-Jun-20 15-Oct-20	000	Network Protocol Communicat Developer creativity to perfor Project Team may encounter r	6 6	24-Apr-20 24-Jul-20
Late Tasks	Software Contents defined Hardware for Infrastructure def	 21-Jun-20 25-Jun-20 30 km 20 		System Requirements and Pef Analysis report of the current	9 9 6	21-Aug-20 10-Jun-20	000	Resources may not be availabl Server Hardware may need to	9 6	16-Jun-20 20-Nov-20
Overdue Tasks	Issues	List Due Date		Decisions		Due Deter		Change Reques	ts	Due Date
6 C	Deployment Logistics tasks un Resources planned for coding	 Due Date 11-May- 11-Jun-20 		Allow approved overtime for Hold quarterly project review	CLITIK CO CP	24-Apr-20	•	Support Mobile Device Support	ପ୍ର ଡୁ	07-May-20
Effort Completed 1,018	Competition is actively deploy Existing system documentatio	 30-Jul-20 16-Oct-20 	Į	Need to add unplanned ident.	୍ଦ୍ର ବ	10-Apr-20 19-Jun-20	00	Add support for Access datab Automatically change the user	ର ଡ	24-Jul-20 26-Jun-20
Effort Remaining	Funding not identified for alte Hardware Vendor not complia Realiminance bardware design	 24-Sep-20 16-Jun-20 		Confirm Marketing Collateral Consider additonal resources,	9 9	14-Aug-20 17-Jul-20	000	Performance Statistics Interface Provide option to clear softwa	9 6 9	20-Aug-20 23-Jul-20
8,896 Hours	Resources being diverted fro	13-Jul-20	ř	 Hold Team Status Meetings M. 	@	18-Dec-20	0	Add new feature to extract da	୍ଚ	15-Jan-20

Þ

Update project costs

Project Manager

Project IQ – Financials tab



1. RECORD ACTUALS AND UPDATE PROJECT FORECASTS

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

AA Ten Project Active Status	ant Renewa Cass Portfolio Progr	al R300 owary Prod	luct Deve	elopment E	Bret Prinz Project Manager	~		
Major Proj Active for 4	ect months	<	Pla	anning	Exec	ution (47 D)		Closing
Details	Key Dates	Deliverabl	es Ta	sks Status	Updates Is	sues Financ	ials …	
	🗟 Timeline	🔁 Key dat Years	es Zoor	Today 15 Jun	🔿 Month Č) Refresh +	New Budget	+ New Cost
		Months		Jun	Jul	Aug	Sep	Oct
~	Bud \$229	get .4K		\$32K	\$32K	\$12K	\$12K	\$62K
~	Fore \$765	ast .6K	<	\$528.3K	\$52.3K	\$71.5K	\$11.5K	\$16K
~	Act \$699	ual .4K		\$514K	\$88K	B	\$0	\$0
~	Varia -\$536	nce 5.2K	к	-\$496.3K	-\$20.3K	-\$59.5K	\$500	\$46K

c. Enter the actual costs by line.

Sea	rch	,P + New	Cost						
	Category/Name	Date		Forecast		Actual	Transaction Note	Budget	Variance
	Capex			\$3,500.00		\$0.00		\$8,000.00	\$4,500.00
o	Hardware	30 Sep 2020🖽	s	1000	s				
0	Labor - Contract	20 Sep 2020	s	1500	s				
o	Software	20 Sep 2020	s	1000	s				
	Opex	C		\$8,000.00		\$0.00		\$4,000.00	-\$4,000.00
o	Labor	30 Sep 2020	s	6000	s				
o	Travel	30 Sep 2020	s	2000	s				
	Totals:			\$11,500.00		\$0.00		\$12,000.00	\$500.0

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

			0					_	
jor Pro	ject < 29 days <		Planning (S D	2)			Evec	ution	
rtails	Key Dates Deliverables	Tasks Status	Updates Issue	s Risks De	cisions Change	Requests Less	sons Learned	Financials Doci	uments
								🖽 Timeline 🚦	Key dates Zoo
	Years	international internationa International international int					203	20/2021	
	Months	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
	Budget \$856.2K	\$142.7K	\$142.7K	\$142.7K	\$142.7K	\$142.7K	\$142.7K		
\sim					\$195K	\$125K	\$125K	\$125K	\$125K
v	Forecast \$875K		\$125K	\$1 D	VILUIT		VILOIC		
~ ~ ~	Forecast \$875K Actual \$92.5K		\$125K \$17.5K	\$1 \$75K			01201		

Set KPIs and compose status narratives

着 🛛 Project Manager

Project IQ – 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 current status of the project.

N	ew Status Update	9		
KF	PI Status			
	General			
В	Status Date	* 12-Jun-20		
	Created By			
	🛆 Created On			
	Project			
	Project KPI	On Track	On Watch	Troubled
C	Project Status			

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

New Status Updat	e				Program Project
KPI Status					
General		Schedule		Issues	
Status Date	* 12-Jun-20	Schedule KPI	On Tack On Watch Trouble	d Issues KPI	On Task On Watch Tout
🗄 Created By		Schedule Status		issues Status	***
🗄 Created On					
Broject		Financials		Hisks	
Project KP1	On Track On Wetch Trackled	Financials KPI	On Track On Watch Trouble	I Ripks KPI	On Track On Watch True
Project Status	The project is fully staffed and entering the next phase on schedule	Financials Status		Risks Status	***
	1				
Deliverables		Work		Change Requests	
Deliverables KPI	On look On Wetch Troubled	Work KPI	On Isack On Welch Insuble	1 Change Requests KP	On Track On Welch Tra
Deliverables Status		Work Status		Change Requests Status	

View and verify project status report

Project Manager

🤌 Project IQ

1. REVIEW AND VERIFY THE PROJECT IQ STATUS REPORT

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

۲	🖬 s	ave 🛱 Sa	ive & Close	+ New Proje	ect 🛛 💁 Open in Pro	iject 🛛 📫 Oper	i in Teams 📢	Open in SharePoint	🖒 Refresh 🛛 🗄	🗘 Process 🗸 🗸	🖻 Share	🕼 Email a Link	🔟 Run Report 🖂	
A Pi	A Ten	ant Rene	wal R300									Activ	Run on Selected Records	
Ma Ac	ajor Proje tive for 4	ect months	<		Plann	ning			Exe	ecution (47 D)				Closing
D	etails	Key Dates	Deliverabl	es Tasks	Status Updates	Issues Risks	Decisions	Change Requests	Lessons Learn	ed Financi	ils Docum	ients		



b. 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 Project IQ and/or Project for the web to ensure that the status report is accurate and consistent with the project's status.

	· >	ÞI	Ö	⊚	100%	~		e e			
								15-Jun-2020			
ProjectQ PROJECT STATUS REPORT											
AA Tenant Renewal R300											
Project Manager Bret Prinz	B	Sponsor ob Meh	rin		Current S Executi	age on		% Complete 9%			
Project status	Project status										
Project KPI		Schedule			Risks			Issues			
		٠			•			•			
Change Requests		Deliverabl	es		Financia	als		Work			
•		٠	• •					A			
Status Date: 07-Jun+2020											
Our biggest challenge is the internal work as a result. We i	delayed sign- nave verbal aj	off on fun pprovals, b	ding. This is	s delayin; t need th	g our vendo e signed pa	rs on-boa perwork.	arding and als	io pushing the			
Start Date			Targe	et Finish			Scheo	duled Finish			
06-Apr-202	0		04-De	ec-20	20		27-A	ug-2021			
Total Effort			Effort (omplete	d		Effort	Remaining			
9,914			1,	292			8	,622			

2. REVIEW AND VERIFY THE INSIGHTS STATUS REPORT

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

	rtc		Project KPI
LEI AIT FTOJEC	_15	\bigcirc	All
Projects by Progress	KPI Project	Link	Project Manager
Not Started	Email campaign to increase	rider's awaren 👁	Connie Campaign
Completed	AA Tenant F Show as a tal	ble	Bret Prinz
	Central Ave	e	Diane Masters
In Progress	A Driver awan Drill through	PROJECT STA	
	Annual entr		TUE ALS DA
Active Issues	Application SaaS Migration	e	Albert Connell

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 Project IQ and/or Project for the web to ensure that the status report is accurate and consistent with the project's status.

© Project	Status: Email campaign to	increas	se rider's awareness	B O O O OVERVIEW DETAILS TRACKING
Project KPI	Project Link Project Manager Start Finish C	hanges Delive	rables Financials Issues Risks	Schedule Work
Troubled	🔶 🌩 🐵 Connie Campaign 17-Feb-20 19-Aug-20	▲ → ◀	• • • • • • •	$\psi \Leftrightarrow \Rightarrow \blacklozenge \psi$
Scheduled Finish	Current Project Status 03-May-20		Previous Project Status 20-Dec-19	% Complete
19-Aug-20	This project is significantly behind. Our sponsor has requested a meeting part week to review and revise the timeline			
Target Finish				2206
19-Aug-20				Z 370
15-Aug-20				
Late Tasks	KPI Milestone	Finish	KPL Milestone	Planned Finish
2	Email campaign defined		Campaign launched	19-Aug-20
Overdue Tasks				
7				
Effort Completed				
536 Hours				
Effort Remaining				
1,512				
Hours				