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.

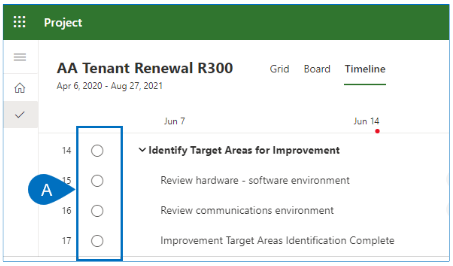
1. Update schedule in Project for the web
2. Validate key dates and deliverables
3. Monitor project dates and artifacts
4. Update project costs
5. Set KPIs and compose status narratives
6. View and verify project status report

Update schedule in Project for the web

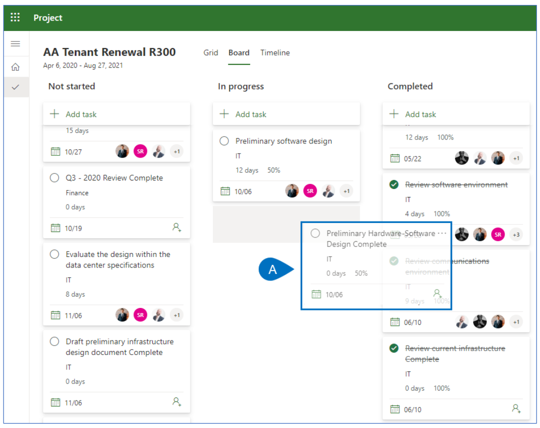
Project Manager | **Project for the web – Project to be updated is open**

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.



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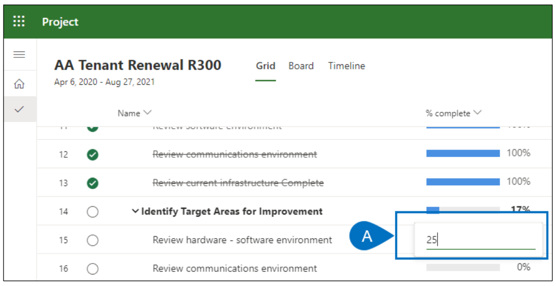
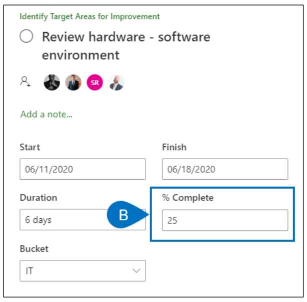
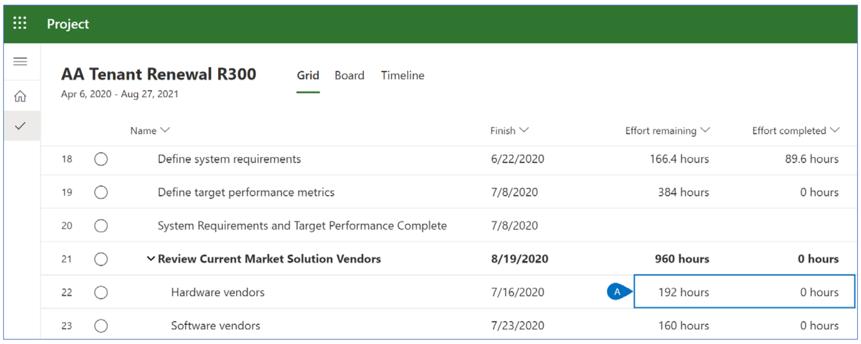
c. Ensure the **% complete** column is visible in the Grid view, and enter the updated % complete directly in the column.



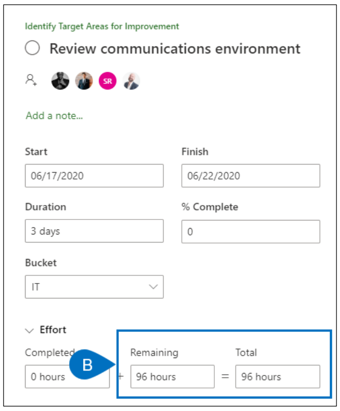
d. In any view, click the **i icon** to open the task details pane and enter the updated status in the **% complete** field.



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.



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.



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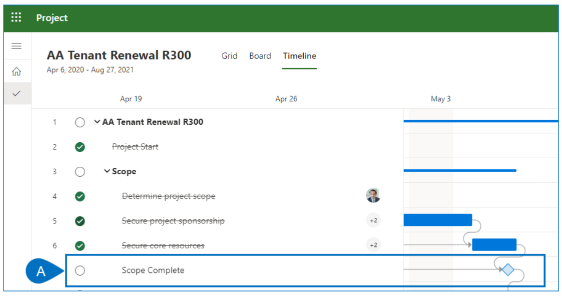
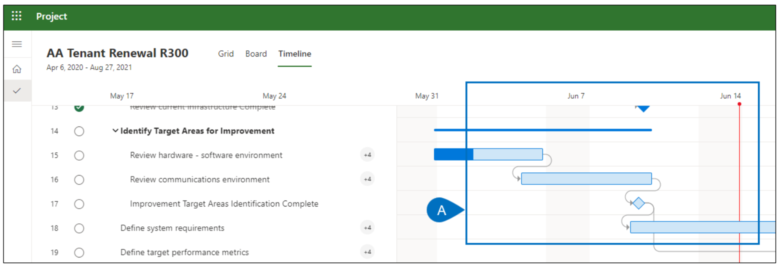
2. MARK MILESTONES AS COMPLETE

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.

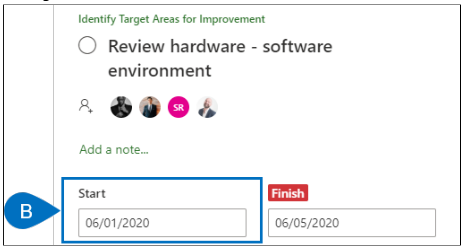


3. RESCHEDULE INCOMPLETE WORK IN THE PAST

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



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



Validate key dates and deliverables

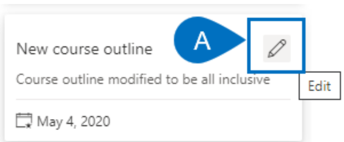
Project Manager

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).



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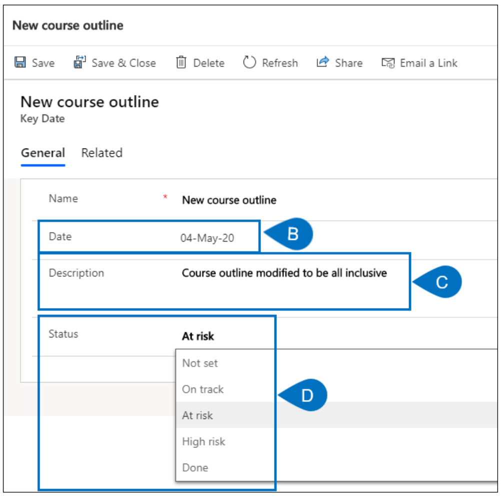
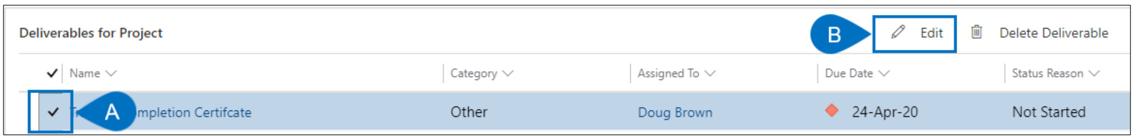
b. Update the **Date** to reflect the current schedule.
c. Add any additional details in the **Description** field to better describe the new key date.
d. Set the **Status** as appropriate based on how much the date has changed from the original expectation.

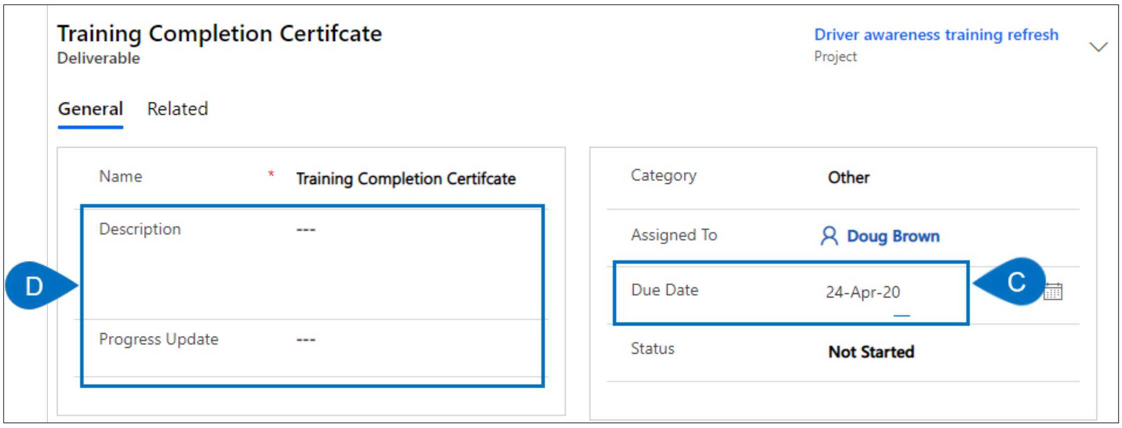


2. UPDATE DELIVERABLES

a. 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).



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.



Monitor project dates and support items

Project Manager **Project IQ – Insights – All Projects**

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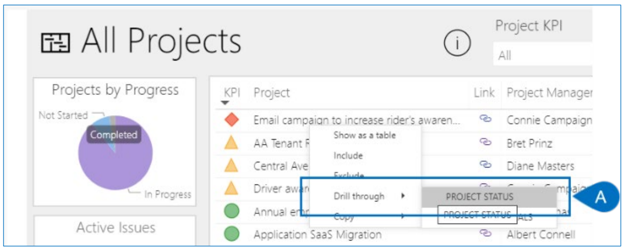
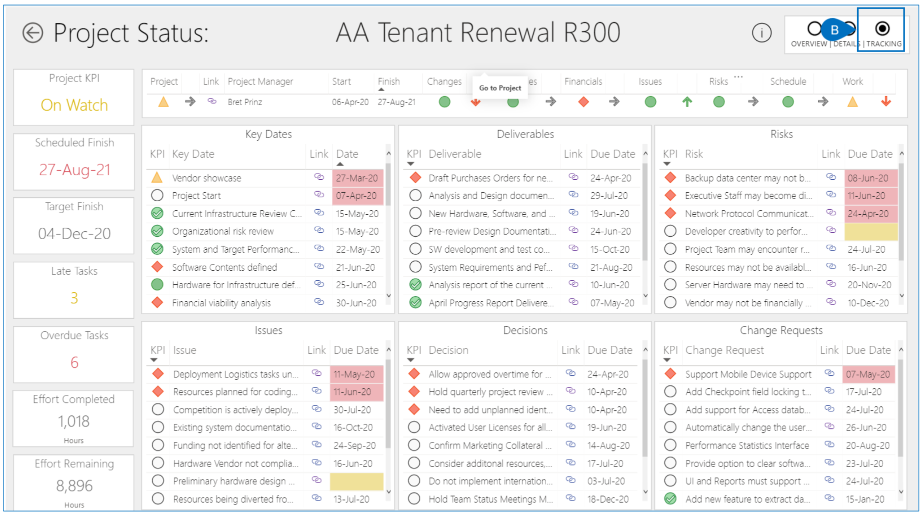
1. REVIEW PROJECT PERFORMANCE

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

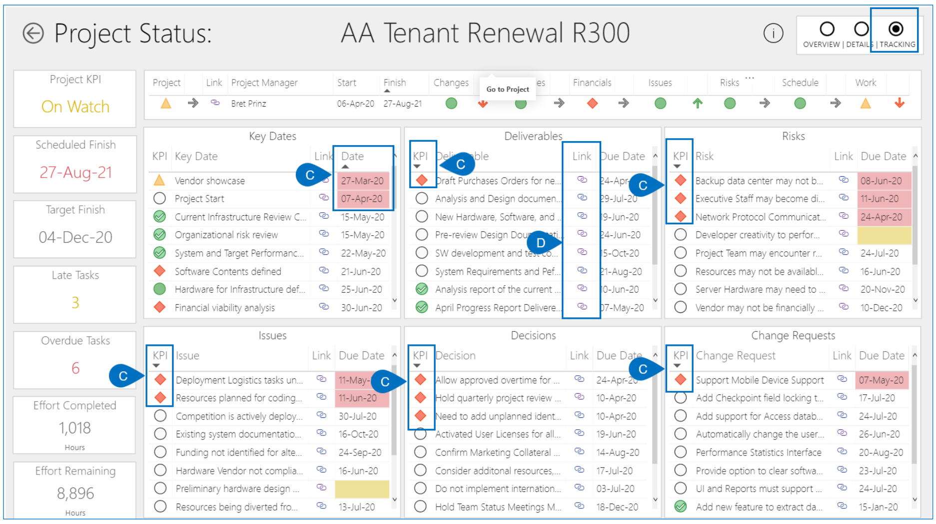


b. Click on the Tracking radio button.



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



Update project costs

Project Manager | **Project IQ – Financials tab**

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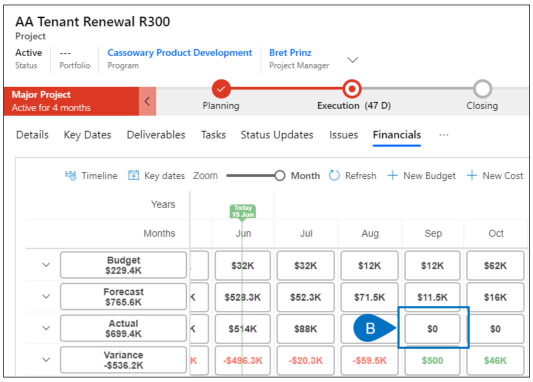
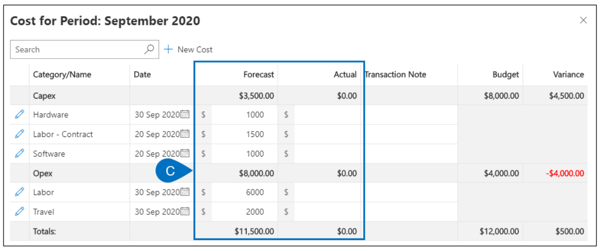
1. RECORD ACTUALS AND UPDATE PROJECT FORECASTS

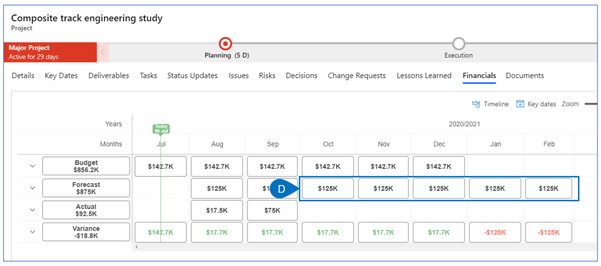
a. Open the **Financials** tab for the current project.
b. Select the Forecast card for the month you are updating actual costs.



c. Enter the actual costs by line.



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

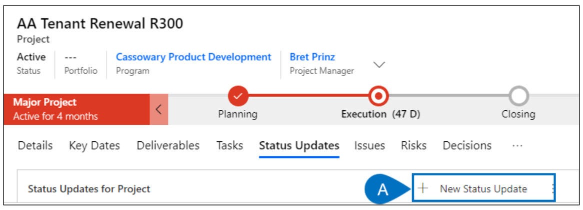


Set KPIs and compose status narratives

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.**



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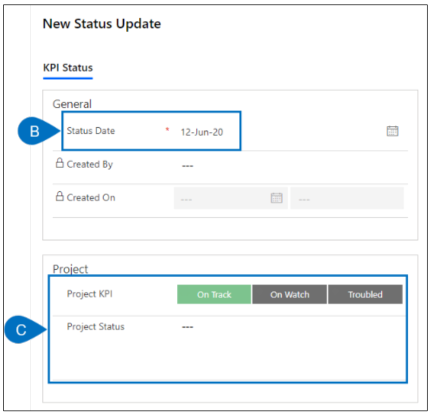
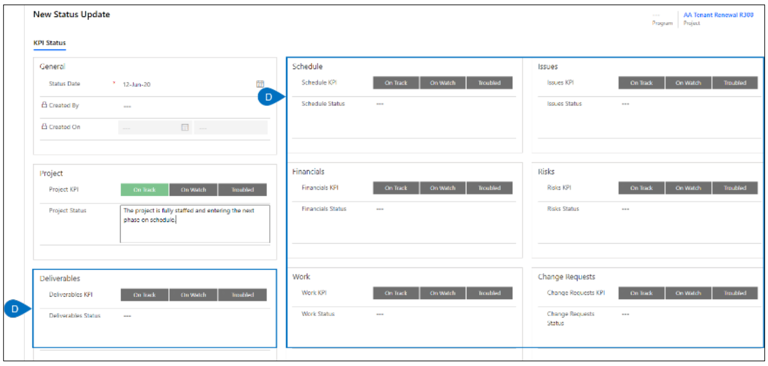
b. Create a new project status update for the current period. Ensure the Status Date is set to reflect the status period end date.

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.



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

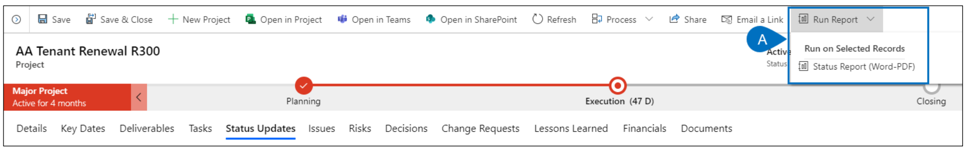


View and verify project status report

Project Manager **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.



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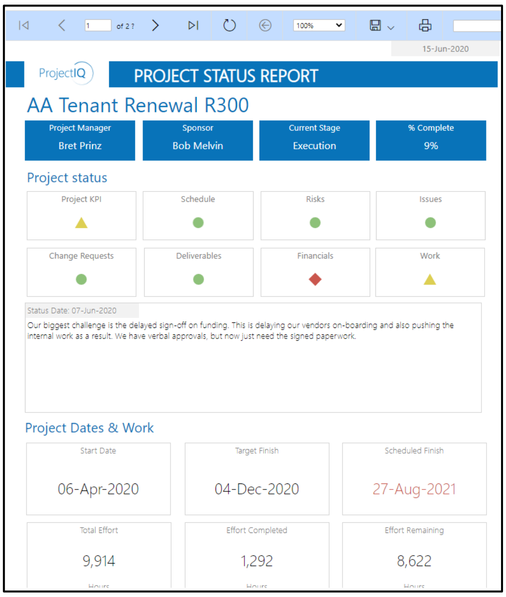
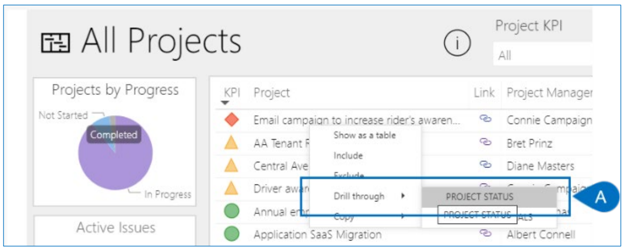
b. Review the project status report and validate that the status report delivers the appropriate message to the project stakeholders. If changes are needed, return to Project IQ and/or Project for the web to ensure that the status report is accurate and consistent with the project's status.

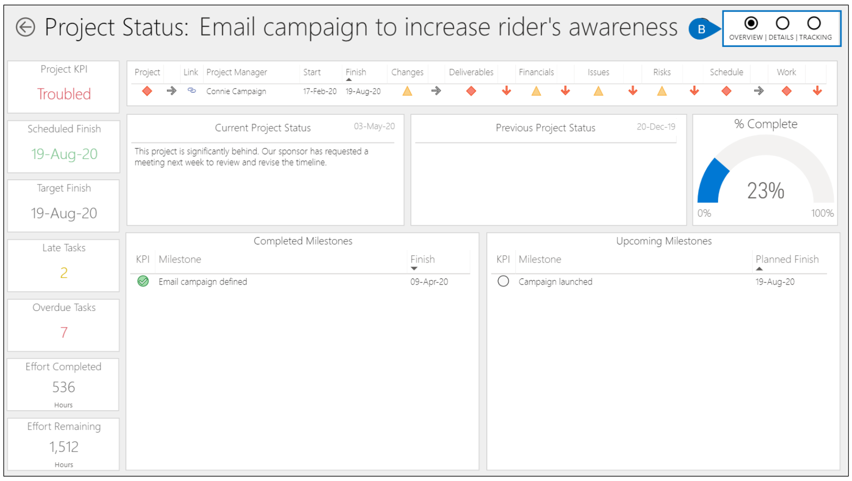


2. REVIEW AND VERIFY THE INSIGHTS STATUS REPORT

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



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.



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