



Tracking Project Progress

 Project IQ

 Project Manager

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of **senseiIQ™** in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.

Please note the Job Aid for [Tracking Project Progress](#) within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.


- Lab Exercise 1.** Update Project Costs – Actuals
- Lab Exercise 2.** Set KPIs and Compose Status Narratives

1. Update Project Costs – Actuals

Set A – Hardware Budget

Name Big Routers


Amount \$15,000

Date Select August of the current year from the date picker 

Transaction Note Invoice 345321

Name Hardware


Amount \$15,000

Date Select September of the current year from the date picker 

Transaction Note Invoice 345325

Name Team Servers

Amount \$20,000


Date Select months of October until December of the current year from the date picker 

Transaction Note Invoice 345329, 345330, and 345331.

Set A – Labour Budget

Name Labour Expense


Amount \$20,000

Date Select August of the current year from the date picker 

Transaction Note Invoice 90765

Name Labour Expense


Amount \$20,000

Date Select September of the current year from the date picker 

Transaction Note Invoice 90766

Name Labour Expense

Amount \$20,000

Date Select the months October through to December of the current year from the date picker 



Transaction Note Invoice 90767, 90768, and 90769

Set B – Software Budget

Name Licenses


Amount \$15,000

Date Select August of the current year from the date picker 

Transaction Note Invoice 345367

Name Ongoing Costs

Amount \$15,000

Start Date Select September of the current year from the date picker 

Number of Months Invoice 345368

Set B – Travel Budget

Name Travel Expense


Amount \$20,000

Date Select August of the current year from the date picker 

Transaction Note Invoice 90778

Name Travel Expense


Amount \$20,000

Start Date Select September of the current year from the date picker 

Number of Months Invoice 90779

Name Travel Expense

Amount \$20,000


Date Select the months of October until December of the current year from the date picker 


Transaction Note Invoice 90780, 90781, and 90782



2. Set KPIs and Compose Status Narratives

Set A


Project KPI (Baseline)	On Track
Status Date	Select the last day of the previous month from the date picker 
Project Status	Project has been approved and schedule activities are being ramped up
Deliverables KPI	On Track
Deliverables Status	Deliverables should be identified within the next 2 weeks
Schedule KPI	On Track
Schedule Status	Early stage of the program
Work KPI	On Track
Work Status	Detailed schedules under development
Financials KPI	On Track
Financials Status	Negotiation continues with the executive team to secure the needed funding for this program
Issues KPI	On Track
Issues Status	No issues yet
Risks KPI	On Track
Risks Status	Risks are being identified and categorized
Change Requests KPI	On Track
Change Requests Status	None to date

Project KPI (Current)	On Watch
Status Date	Select the last day of the previous month from the date picker 
Project Status	This project is on watch due to a couple of budgeting delays and physical constraints
Deliverables KPI	On Watch




Deliverables Status	Some priority deliverables are overdue
Schedule KPI	Troubled
Schedule Status	Schedule is not on target
Work KPI	On Watch
Work Status	Detailed schedules under review
Financials KPI	On Watch
Financials Status	Cost overrun is being resolved with the finance department
Issues KPI	On Watch
Issues Status	High priority issues have been identified
Risks KPI	On Track
Risks Status	No outstanding risks in the current period
Change Requests KPI	On Watch
Change Requests Status	Pending change requests are awaiting approval

Set B

Project KPI (Baseline)	On Watch
Status Date	Select the last day of the previous month from the date picker 
Project Status	Tracking as planned with some cost variance
Deliverables KPI	On Track
Deliverables Status	Tracking as planned
Schedule KPI	On Track
Schedule Status	Tracking as planned
Work KPI	On Track
Work Status	Tracking as planned
Financials KPI	On Watch
Financials Status	Some cost variance



Issues KPI	On Track
Issues Status	Tracking as planned
Risks KPI	On Track
Risks Status	Tracking as planned
Change Requests KPI	On Track
Change Requests Status	Tracking as planned

Project KPI (Current)	On Watch
Status Date	Select the last day of the previous month from the date picker 
Project Status	We continue to reduce scope to meet the budget and are close to getting back on track with a modified approach
Deliverables KPI	On Watch
Deliverables Status	Deliverables are currently being reviewed
Schedule KPI	On Watch
Schedule Status	Schedule variance is currently being reviewed
Work KPI	On Watch
Work Status	Schedule work variance is currently being reviewed
Financials KPI	On Watch
Financials Status	Cost variance is currently being reviewed
Issues KPI	On Track
Issues Status	Tracking as planned
Risks KPI	On Track
Risks Status	Tracking as planned
Change Requests KPI	On Track
Change Requests Status	Tracking as planned