

TOPIC A

Enter Task Progress

As the project team works to complete tasks, you need to capture the status of the tasks in the project plan so that you can later effectively track and report your project's status. In this topic, you will enter progress on tasks and update the project plan.

Task Progress

Task progress is the progress information about a task that you need to capture to keep the project plan up-to-date when a project is in the execution phase. The task progress can include the percentage complete, the actual start date, and the actual or projected finish date of the task. When you update the progress on a task, Project may automatically update the amount of work completed and the associated cost depending on the task settings. Also, any successor tasks dependent on the task you are updating will be automatically rescheduled if they are set to auto-scheduled mode if the update causes a change in the dependency dates. For example, if you complete a task a day early, Project may assume that the next task that is supposed to start when that task finishes can also start a day early.

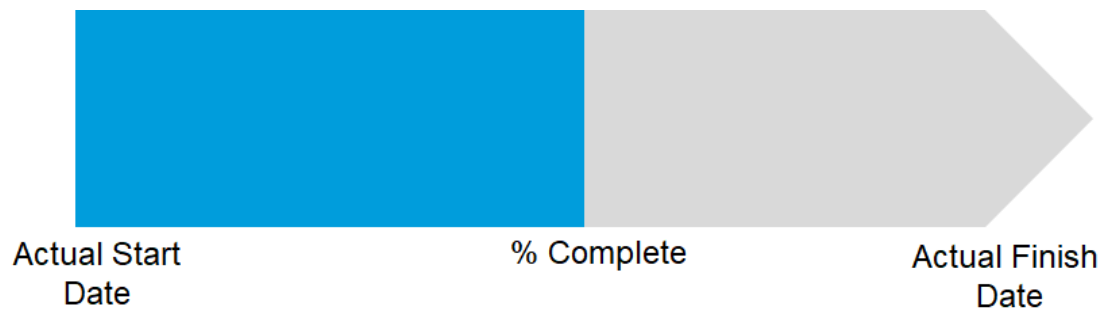


Figure 1–1: Task progress includes actual start and finish dates as well as percent complete.

The Status Date

The **status date** is a date that is used to check a project's status at a particular point in time. Typically, it is used to enter or view progress information on a date in the past, or used for forecasting. It can be specified on the **Project** tab on the ribbon. By default, the current date is used as the status date.

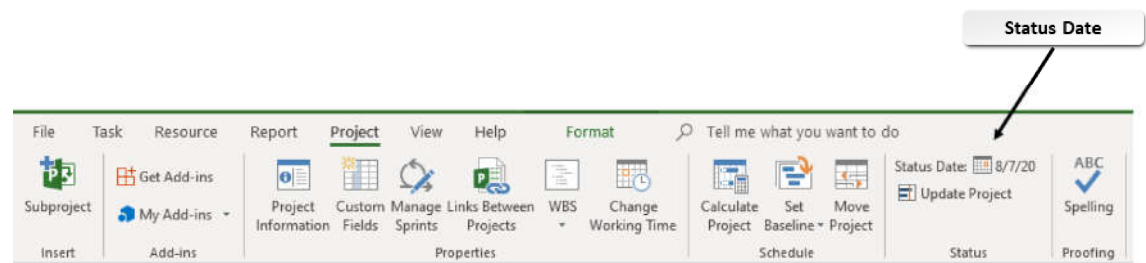


Figure 1–2: The status date on the Project tab.

The Status Date Dialog Box

The **Status Date** dialog box enables you to change the status date for the project. When you update task status, you can specify the status as of the current date or for a status date. A status date is a date that you specify for reporting on a project. If you don't set a status date, Project assumes that progress updates are relative to the current date. For example, if your team reports task status to you on Friday and you enter your updates for last week on Monday, you can set the status date to the date corresponding to last Friday so that your reporting and estimates are accurate. You can access the **Status Date** dialog box on the **Project** tab.

The Mark on Track Command

The **Mark on Track** command will update the selected tasks so that they are on schedule as of the status date. For example, if you have a task that lasts two weeks and as of the first week, you use the **Mark on Track** command to update it, Project will update the progress to 50% complete as of the status date you have set. You can select multiple tasks to quickly mark them as on track as of the status date. You can find the **Mark on Track** command on the **Task** tab.

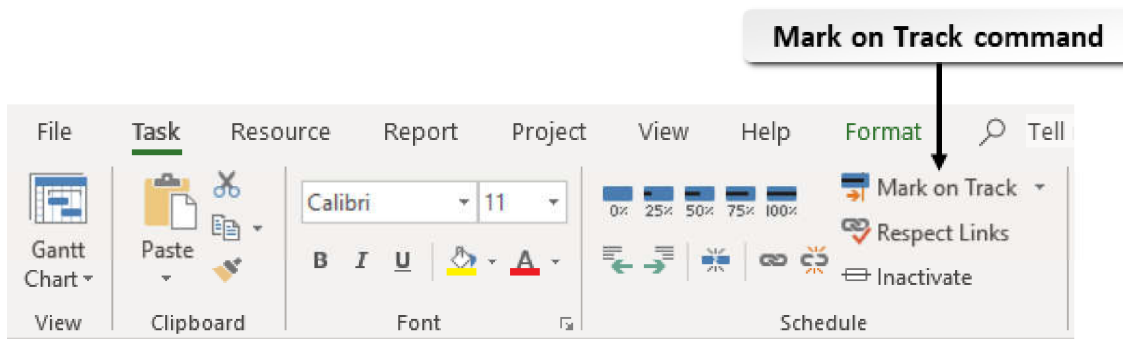


Figure 1–3: The Mark on Track command.

The Update Tasks Dialog Box

The **Update Tasks** dialog box gives you more control over updating a task. To prevent a delay in one task from affecting the entire project and to maintain an accurate record of the project's progress, you should update the actual start date for a task that does not start according to plan. Also, sometimes a task will start on schedule but finish before or after the planned date. In this case, you should update the actual finish date for the task because its finish date might affect the start date of other tasks. You can use the **Mark on Track** drop-down arrow to access the **Update Tasks** dialog box, to enter a task's actual start and finish dates.

Figure 1-4: Use the Update Tasks dialog box to update the status of tasks that are not on schedule.

The Tracking Table

The **Tracking** table allows you to track task progress. The table's default column headers offer several options to gather and display tracking-related information.

Column Header	Description
Act. Start	Actual Start. The date that a task actually began.
Act. Finish	Actual Finish. The date that a task was actually completed.
% Comp.	Percent Completed. The present status of a task, expressed as a percent of the task's duration.
Phys % Comp.	Physical Percent Completed. A percent complete value that can also be used to help calculate budgeted cost of work performed.
Act. Dur.	Actual Duration. The length of actual working time for the task up to this point.
Rem. Dur.	Remaining Duration. The amount of time necessary to complete the task.
Act. Cost	Actual Cost. The cost of the work that has been completed by resources connected with that task.
Act. Work	Actual Work. The amount of work that has already been completed by resources assigned to the tasks.

You can access the tracking table by selecting **View**→**Tables**, then selecting **Tracking**.

The Tracking Gantt Chart

The **Tracking Gantt** chart is displayed in the **Tracking Gantt** view. It displays the percentage of work completed per task. Demarcation of noncritical task bars and shading of critical task bars also indicate the amount of work completed. Gantt bars indicating progress for summary tasks and the project summary task are also visible. Actual progress can be compared to planned (baseline) progress, with actual progress shown as blue Gantt bars and baseline as black Gantt bars.

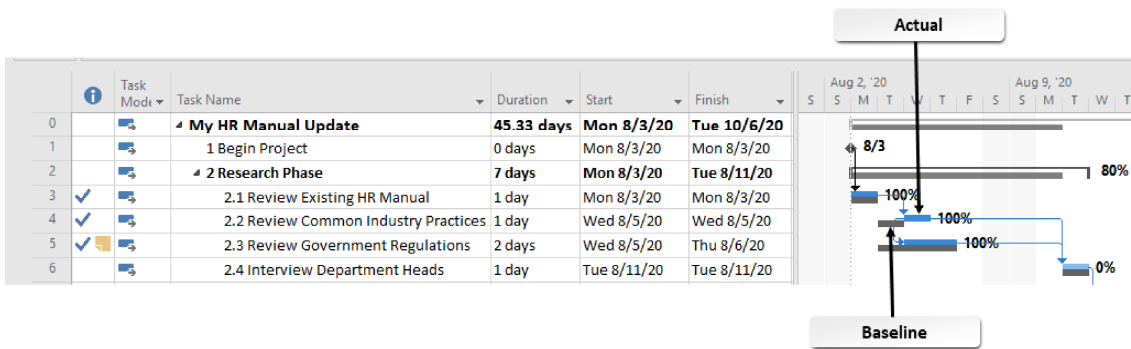


Figure 1–5: Progress information in the Tracking Gantt chart.

The Variance Table

The **Variance** table allows you to check whether your project is on track. The table's default column headers offer several options to gather and display tracking-related information.

Column Header	Description
Start	Actual or projected start date.
Finish	Actual or projected finish date.
Baseline Start	Planned start date as recorded in the Baseline table.
Baseline Finish	Planned finish date as recorded in the Baseline table.
Start Var.	Calculation of Start minus Baseline Start ; positive values are behind schedule.
Finish Var.	Calculation of Finish minus Baseline Finish ; positive values are behind schedule.

You can access the **Variance** table by selecting **View**→**Tables**, then selecting **Variance**.

The Duration, Cost, and Work Variances

Some common variances that project managers check are the duration, cost, and work variances. However, they are not available in the **Variance** table by default. To access these variances:

- For duration variance, add a **Duration Variance** column.
- For cost variance, choose **Tables**→**Cost**.
- For work variance, choose **Tables**→**Work**.

Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Enter Task Progress.

ACTIVITY 1–1

Entering Task Progress

Data File

C:\091099Data\Updating a Project Plan\HR Manual Update.mpp

Before You Begin

Microsoft Project is installed on your computer.

Scenario

You are a project manager for Greene City National Bank, a mid-sized financial institution with 26 branches in Greene City and surrounding towns. You are working on your first project, a training manual that will be used by the Human Resources Department to track the hiring and training of all bank employees.

Three months ago you prepared a project plan in Microsoft Project, and that plan has been approved by the HR Department manager and the Project Management Office (PMO). The project formally kicked off on August 3, 2020 and your team has completed its first week of work. You are ready to update the project plan with the team's accomplishments.




Note: This plan was created in the *Microsoft Project 2019 (On-Premise or Online Editions): Part 1* course, and it will serve as the basis for all activities in this Part 2 course.



Note: Detailed steps of activities are likely to vary as Microsoft issues digital updates.

1. Open Microsoft Project 2019.

- a) On the taskbar, select the **Project 2019** shortcut. 
- b) Verify that Microsoft Project opens.

2. Open the HR Manual Update.mpp project plan file.

- a) Select **File**→**Open**.
- b) Select **Browse**.
- c) In the **Open** dialog box, navigate to the **C:\091099Data\Updating a Project Plan** folder containing your class files.
- d) Select **HR Manual Update.mpp** and select **Open**.

3. Review the project plan.

- a) Note that the project begins on August 3, 2020, it finishes on October 8, 2020, and it has eight phases.
- b) Select **Project**→**Change Working Time**, and note that a custom calendar named **GCNB Standard Calendar** has been assigned to the project. The calendar has several holidays as exceptions, when the project team will not work. Select **Cancel** to close the **Change Working Time** dialog box.
- c) Scroll vertically to the bottom of the project plan, and note that the final project deliverables are a Human Resources manual that is printed, distributed to the bank employees, and posted to the bank extranet.

4. Set the status date to August 7, 2020.

- a) Select **Project→Status Date**.
- b) In the **Status Date** dialog box, in the **Select Date** field, enter **8/7/2020**, and then select **OK**.
Verify that the **Status Date** value is 8/7/20.


5. Mark tasks as on track.

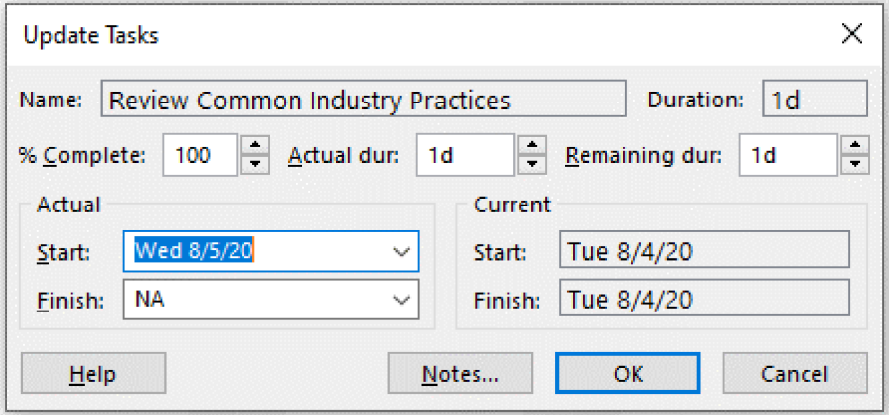
- a) In the **Task Entry** table, select Task 1 **Begin Project**.
- b) On the ribbon, select **Task→Mark on Track**.
- c) In a similar fashion, mark Task 2.1 **Review Existing HR Manual** as on track.

Verify that check marks appear in the **Indicators** column indicating that the tasks are complete, and that a dark blue bar is in the center of the Gantt bar for Task 2.1.

6. Update progress on the other tasks that the team worked on during the week. Both tasks started one day late, and one of them took one day less than planned.

- a) In the **Task Entry** table, select Task 2.2 **Review Common Industry Practices**.
- b) Select the **Mark on Track** drop-down arrow.
- c) Select **Update Tasks**.
- d) In the **Update Tasks** dialog box, make the following entries:
 - % Complete: **100**
 - Actual Start: **8/5/20**

 **Note:** You only need to make entries for the values that changed; Project will update the others.



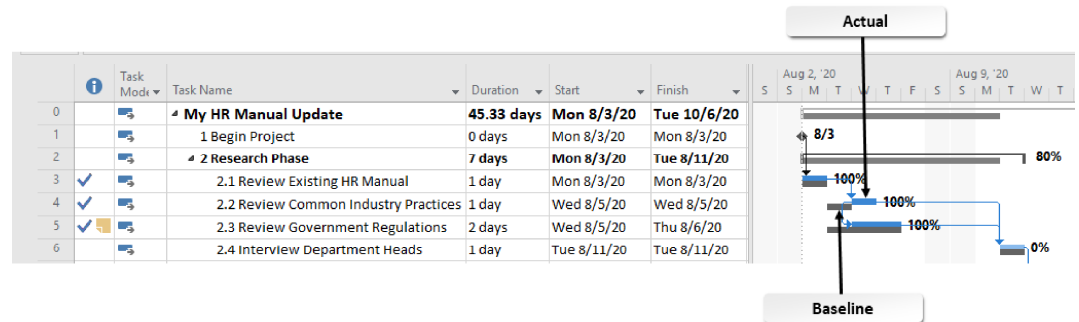
- e) Select **OK**.
- f) In the **Task Entry** table, select Task 2.3 **Review Government Regulations**.
- g) On the ribbon, select the **Mark on Track** drop-down arrow.
- h) Select **Update Tasks**.
- i) In the **Update Tasks** dialog box, make the following entries:
 - % Complete: **100**
 - Actual dur: **2d**
- j) Select **OK**.

7. View the project's progress in the Tracking Gantt chart.

- a) Right-click the left edge of the **Gantt chart** and select **Tracking Gantt**.

- b) Select **Begin Project**, then select **Task→Scroll to Task**.

Note that as of the status date, the **Research Phase** is 80 percent complete and three of the four subtasks have been completed.



8. Save your changes as *My HR Manual Update.mpp*

- Select **File→Save As**.
- Select **Browse** and then navigate to **C:\091099Data\Updating a Project Plan**.
- In the **File name** field, enter **My HR Manual Update** and then select **Save**. Leave the file open.