



TASK UPDATE FOR PROJECT MANAGERS

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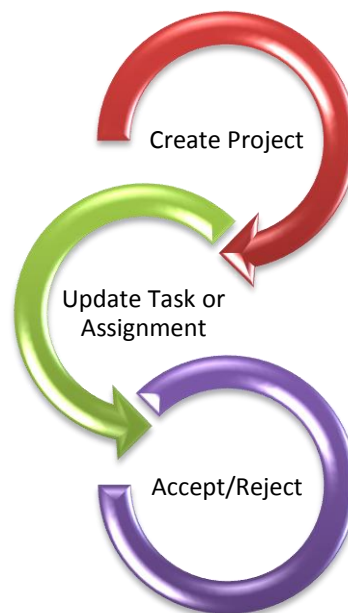
Chapter 1: Overview

Team members who do not need to alter project plans use Seavus Project Viewer™ to view the tasks they have been assigned. But wouldn't it be better to know the progress status of each task in real time as well?

Seavus Project Viewer™ is the only viewer for Microsoft® Project that provides a collaborative environment for project teams without server installation.

The process of sharing is very simple:

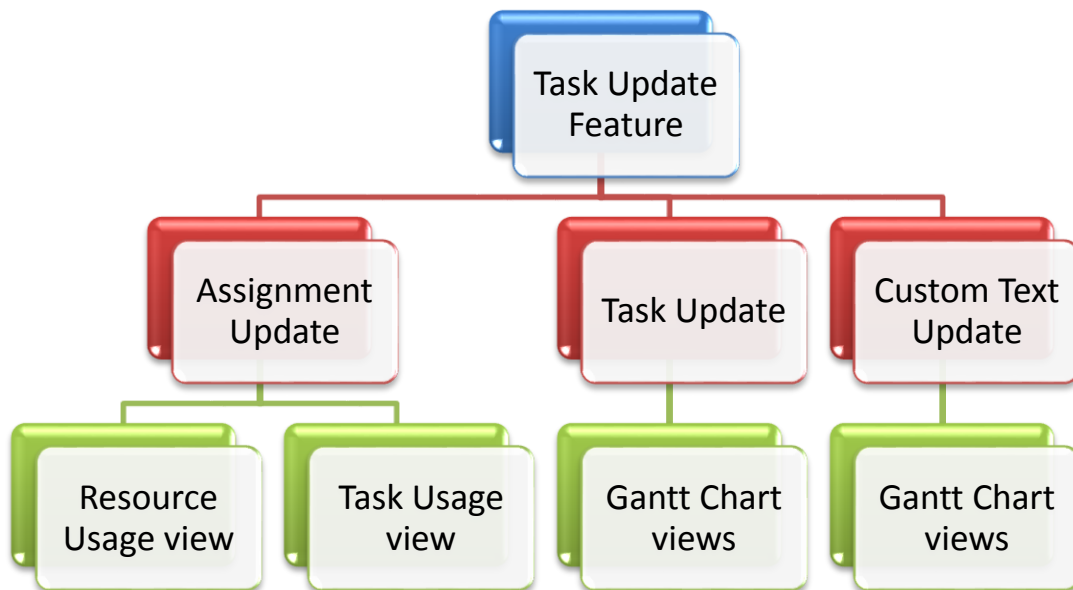
- The project manager creates a project plan in Microsoft® Project and uploads it on a shared location
- Team members open the project plan with Seavus Project Viewer™ and report task progress or assignment progress (% Completed, % Work Complete or Actual Work).
- The project manager then opens the project plan and accepts or rejects submitted task updates.



With this very simple task update process, teams can easily introduce a collaborative project environment where they can:

- Get real-time project status
- Continually evaluate team's performance
- Build knowledge for future projects

The project's categories that are available for updating are presented on the diagram below:



Assignment update

Team Members can update the assignments in the project plan using the Resource Usage or Task Usage view. Project Manager will view this updates using the "Get Updates" functionality in Microsoft Project that is already developed, accept or reject them and the project plan will be updated.

Task Update

Team Members can update the assignments in the project plan using the Gantt Chart view and the fields that are prepared for this purpose. Project Manager will view this updates using the "Show Updates in Gantt Chart" functionality in the Gantt Chart tablet that will be developed.

Chapter 2: Task Update Toolbar in MS® Project

In this section you will learn:

- ✓ Make project collaborative
- ✓ Receive project's updates

Introduction

In order to be able to use Task Update option in your Microsoft® Project, you need to have installed the Add-in for Microsoft® Project - Seavus Project Viewer™.

Task Update options in the Add-in for Microsoft® Project toolbar is an option available to the Project Managers that enables them to:




- Enable collaboration on the Project file (.mpp) they have created
- To receive task updates from the Team members on their assigned tasks
- Accept, Reject the received task updates and update the .mpp file by applying the changes

The .MPP file that will be collaborative must be saved on shared folder, accessible by both Project Manager and Team members. Both parties should have read/write privileges on the shared folder.

Collaboration ribbon

The collaboration ribbon in Microsoft® Project contains commands for converting the project file into collaboration one, receive the updates from the project's teams and choose the updating method.

The following actions are available:

Feature	Description
 Make collaborative	Makes the project plan collaborative for the team members, in order updated of the tasks or assignments to be inserted.
 Get Updates	Receives the updated that are inserted for the tasks or assignments in the project plan by the team members and other project participant.
 Options	Opens up a dialog with configuration options for the application. In this dialog you can specify the updating method, custom field mapping and the process of receiving updated.
Help	Opens up the Contents menu of the context help, which lets you to navigate the entire help through the available categories organized in hierarchy

Select the Updating Method

The first things that should be done when working with is to choose the updating method. Since every company has its own policies regarding projects update, Task Update add-in contains the following update options:

- Update of % Complete
- Update of % Work Complete
- Update of Actual Work
- Update of Actual Start
- Update of Actual Finish
- Update of Actual Duration

Map Custom fields

Mapping the custom fields in Microsoft® Project is necessary in order to choose which fields will be presenting the values that are reported in Seavus Project Viewer™. The mapping process is performed in two cases:

- When starting to work with the Task Update method for first time (the custom fields are not defined);
- When the once defined fields have being put in use (containing data for the project plan).

To map the field for presenting the reported values follow the next procedure:

1. Select the Options feature;

2. In the Mapping tab, select the radio button before the Project's field that is used for task reporting:
 - a. In case you are working with the % Complete field, clicks the radio button in front of % Complete
 - b. Select the Project's custom field that will present the Reported % Complete (type: Number)
 - c. Select the Project's custom field that will present the Difference % Complete (type: Number)
 - d. Select the Project's custom field that will present the Graphical Indicator (type: Text)
3. Click on the Ok button

The look of the Map tab within the Options dialog is presented on Figure 1

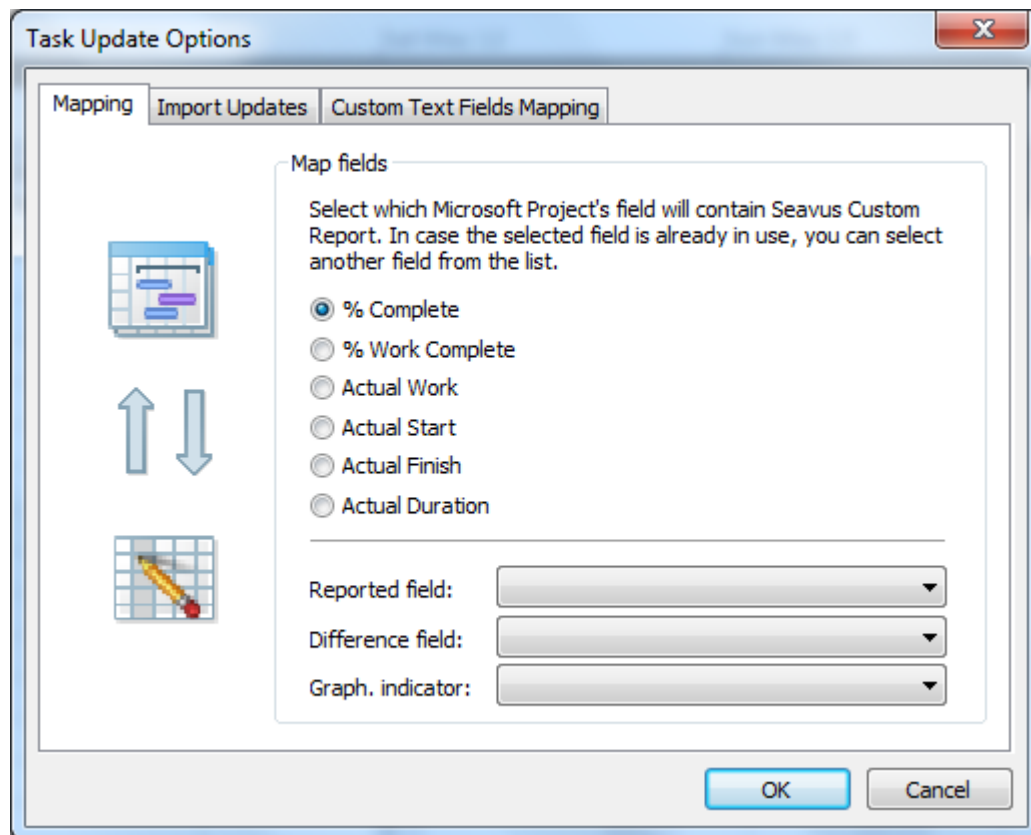


Figure 1. Map tab in Options dialog

Note: The same procedure is for % Work Complete, Actual Work, Actual Start, Actual Finish and Actual Duration fields.

Make your project Collaborative

First step that you need to do is to enable collaboration on your project file stored in shared folder.

To do that, open your file with Microsoft® Project that has previously installed the Add-in for Microsoft® Project with Task Update options and simply click on the Enable Collaboration icon in the toolbar in case for Microsoft® Project 2007 or Make Collaborative feature in the Add-Ins ribbon in case for Microsoft® Project 2016, as it is presented on Figure 2.

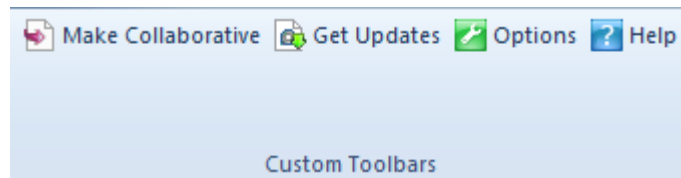


Figure 2.

Before making the project plan collaborative, project manager can select the updating method, i.e. which project categories will be updated:

- Tasks
- Assignments

The updating method can be selected in the lower part of the "Make Project Collaborative" dialog, as it is presented on Figure 3. For that purpose, perform the following steps:

1. Select the project plan that will be
2. From the Collaborative column select the "Yes" for introducing the project plan into collaborative mode.
3. From the Reporting mode column select the

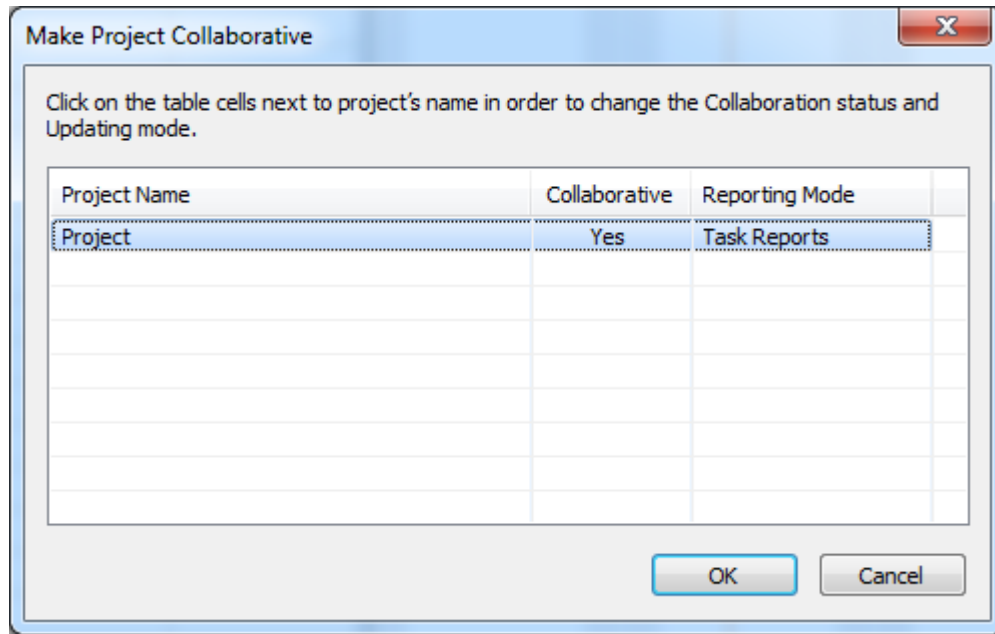


Figure 3. Make project collaborative


By enabling collaboration on your project file, your Team members that have installed Seavus Project Viewer™ with Task Update feature will be able to send updates about actual work they spent on the specific tasks or % Complete of the task.

Constraints using the Make Project Collaborative feature

During the process of making project collaborative, Microsoft® Project will pop-up message for saving the project file(s). Do not use this saving process if you want to:

1. Change the Microsoft® Project version when working with Master Project (example: Master project is created in Microsoft® Project 2007 and you want to re-save in version 2016)
2. When working with password protected files.

Processing received Task Updates

The Project Manager can view all newly received and untreated task updates from all Team members by clicking on the "Get Updates" icon  in the toolbar menu for in case for Microsoft® Project 2007/2003 or by clicking on the same action in the Add-Ins ribbon in case for Microsoft® Project 2016.

Receiving Assignment Updates

The Project Manager has several filtering options to get only the assignment updates that meet the desired criteria. The project manager can filter by:

- Project name
- Task name
- Resource name

The updates that will be accepted by the project manager, will be colored **green**, and those assignments that are rejected will be colored **red**.

Get Updates

Project Name: All Task Name: All Resource Name: All Status: Pending

Name	Date	Work	Act. Work	Ovt. Work	Act. Ovt. Work	Last % Work Comp.	Rep. % Work Comp.
task 1							
Unassigned						0%	10%
task 3							
r1						0%	30%

Mark Assignment as Completed

Select the most appropriate action for your plan:

☒ None (Default)
☐ Update % Work Complete
☐ Update Actual Finish

Comments

Team Member:

Project Manager:

Accept Reject Reset OK Cancel

Figure 4. Get Assignment Updates window in MS® Project

Project manager can insert comments regarding the accepted and rejected assignments and these comments will be available for reading to the team members.

Receiving Task Updates

Updating the project plan can be done using one of the following techniques:

- Using the “Get Updated” dialog, or
- Directly to be inserted in the Gantt table, and inside the Gantt chart project manager will perform the necessary changes

Receive Updates via dialog

When working with the Task Update method, the Project Manager has several filtering options to get only the updates that meet the desired criteria. The project manager can filter by:

- Project name
- Task name

The updates that will be accepted, will be colored **green**, and those assignments that are rejected will be colored **red**.

The look of the Task Updating dialog is presented on Figure 5.

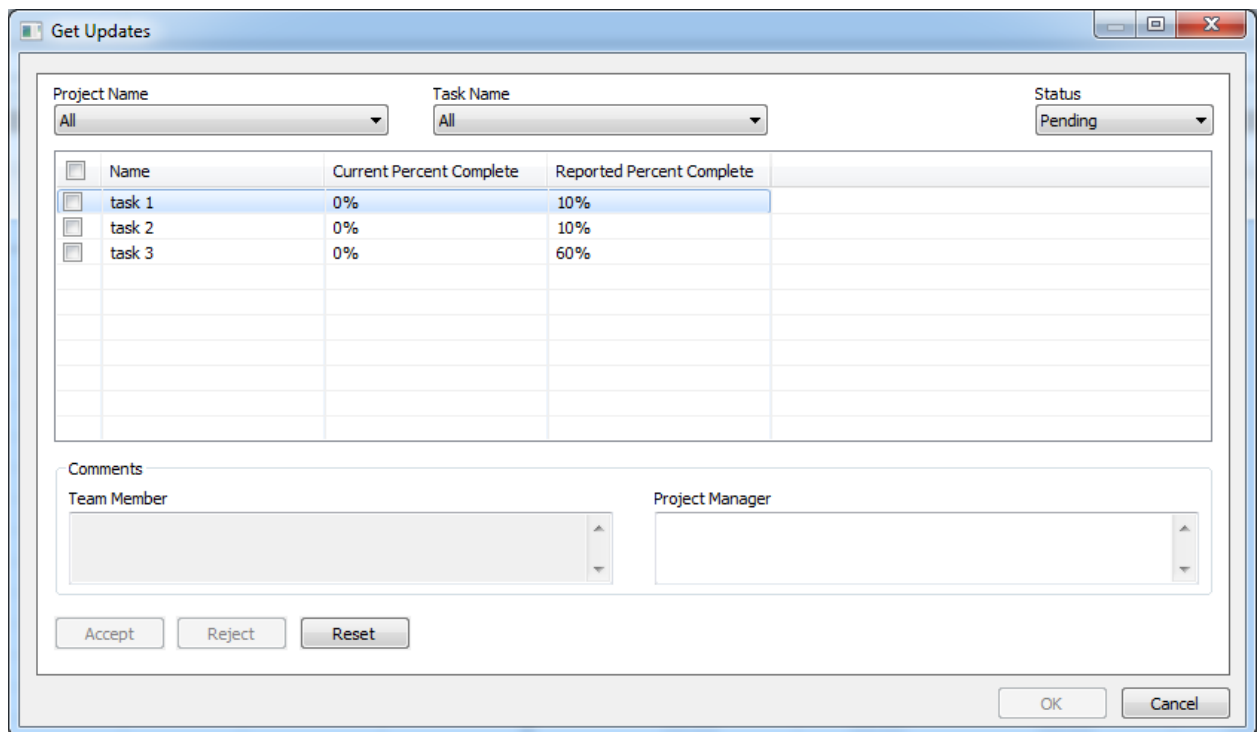


Figure 5. Get Task Updates window in MS® Project

View Updates in Gantt table

When working with the second technique, project manager will view 3 columns in the Entry table in the Gantt Chart:

- Reported field;
- Difference field;
- Graphical Indicators.

Reported field – contains the values that are reported by the team members using the Task Update feature in Seavus Project Viewer™.

Reported field Difference – gives numerical difference between the Reported value and the value from the project plan.

Graphical Indicators – gives visual presentation of the difference between the Reported value and the value from the project plan.

After clicking on the “Get Updated” feature, the updates will be placed directly in the Gantt table.

Import Updates

Import Updates feature, located in the Import Updated tab from the Options windows, allows you to buy-pass the Get Update dialog and directly import in Gantt table.

When the check-box in front of the feature is selected, the updated will be presented in the “Get Updated” dialog, where project manager can decide which updates will be accepted and which one will be rejected.

The look of the Map tab within the Options dialog is presented on Figure 6

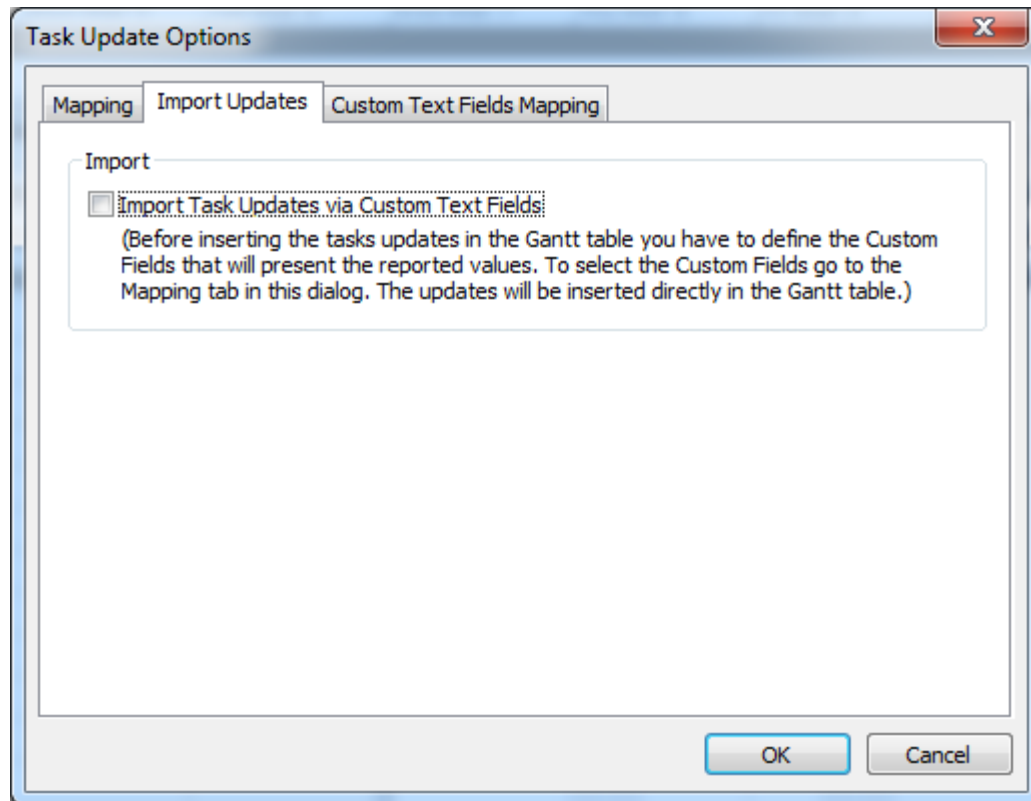


Figure 6. Import Updated tab

Custom Text Fields Mapping

Beside updating % Complete, % Work Complete, Actual Start, Actual Finish, Actual Work and Actual Duration, Project Manager can set three additional fields that can be used for communication with the working team. These fields, from "Text" type can contain any type of information that can be useful for the project manager to get the real overview of the project's progress.

Project Manager can ask from the team members, beside the values for the % Complete for every task, to enter the status for the tasks that they are working on. The workflow for using the Custom Text fields together with updating task's progress in Gantt Chart view will be:

1. Project Manager wants to know the status and the % Completeness of project's tasks
2. From the Mapping tab, the % Complete radio button is selected and the following fields are mapped:
 - a. "Text 1" for Reported field

- b. "Text 2" for Difference field
- c. "Text 3" for Graphical indicator
- 3. From the Custom Text Fields Mapping tab, the following field is mapped:
 - a. "Text 4" for Status field
- 4. When opening the project plan into Seavus Project Viewer™, Team members for "% Complete" will enter numbers, while in the Custom Text fields they will enter the status of the task. Example: On time, Late...

The look of the Map tab within the Options dialog is presented on Figure 7.

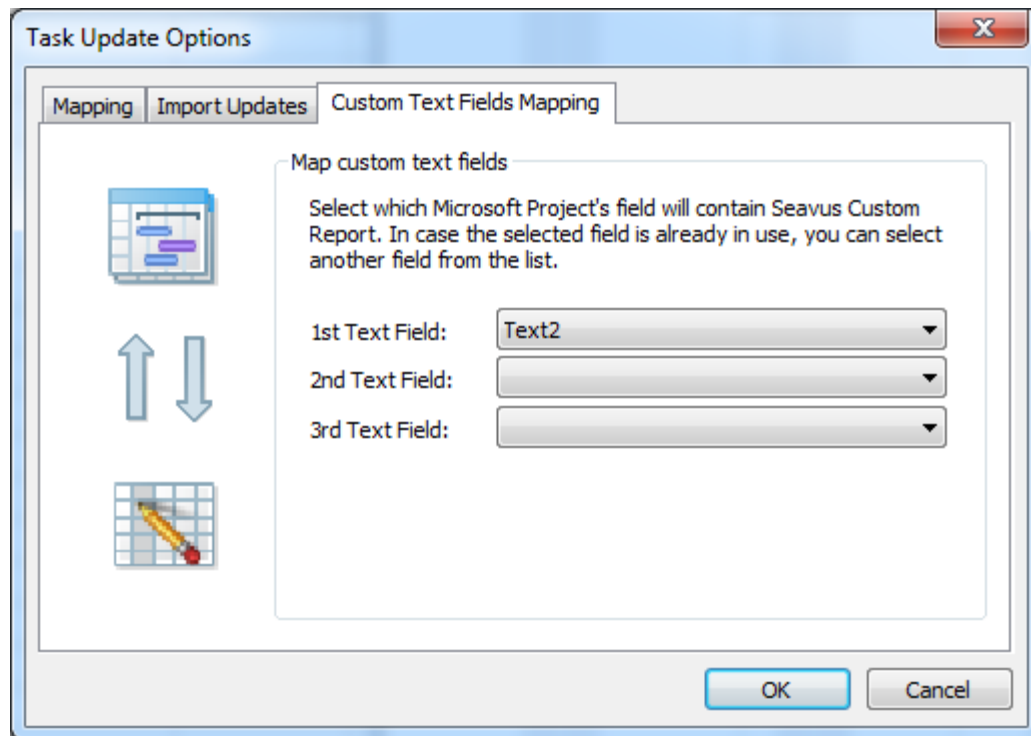


Figure 7. Custom Text fields mapping tab

Chapter 3: Example for making project plan collaborative

In this section you will learn:

- ✓ How to make project plan collaborative

Introduction

In this chapter, the process of making project plan collaborative will be presented.

Create Project plan

First step in this example is to create project plan. In order, to better explain the key steps and the entire process of assign-update-approve, the project plan will be small plan with 15 tasks and 8 resources.

The look of the example project plan is presented on the image below:

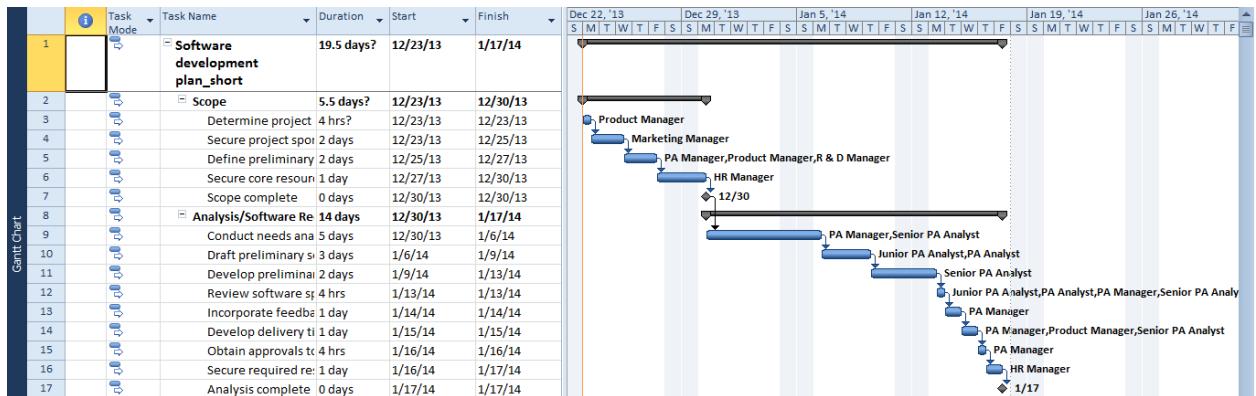

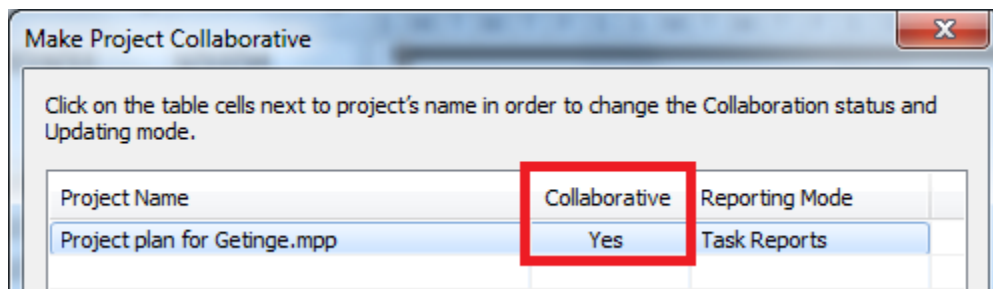


Figure 8. Project plan

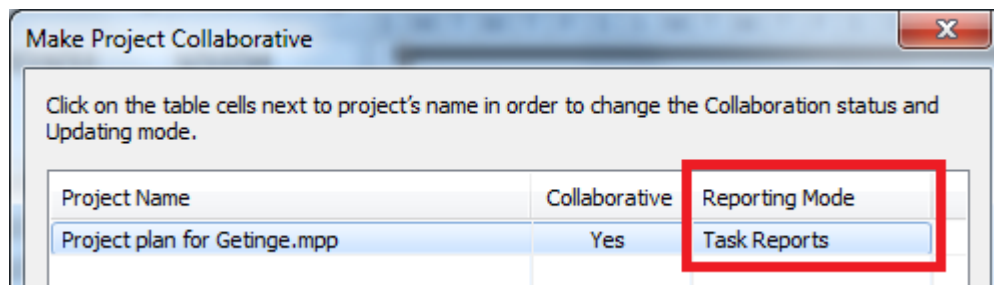
Make Project Plan collaborative

The next step is to make the project plan collaborative, which can be done in several steps:

1. Go to the Add-ins ribbon in Microsoft® Project and click on the  "Make Collaborative" feature.
2. Click on the cell in the "Collaborative" column. The value will be changed from "No" into "Yes". This means that team members can report updates for project's assignments or tasks.



3. Since team members will update % Complete of the assignments, the Reporting mode will be set as "Task Report"




4. Once the collaboration and reporting mode are set, you can click on the "Ok" button.

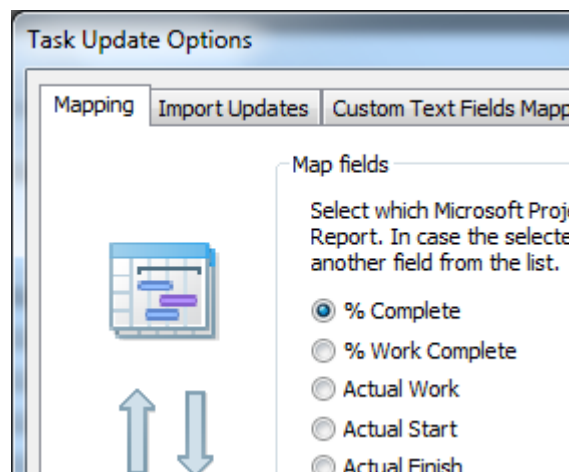
Select the Update method

Once the project plan is collaborative, the next step is to choose the update method. As mentioned in the beginning of this section, all team members will update "% Complete" of the tasks.

The presented process is the same for any update method, no matter whether the project manager chooses to update "% Complete" or "Actual Work" of the tasks.

The process is as follow:

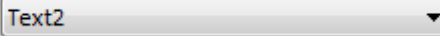
1. In the "Ad-ins" ribbon click on the "Options" button .
2. In the "Task Update Options" select the "Mapping" tab



3. In the "Map field" section select the radio button in front of the appropriate updating method. In this example, the "% Complete" radio button will be selected.
4. In the "Reported field" drop-down list select the Microsoft® Project's field that will contain updated from Seavus Project Viewer™. In this example, the "Text 1" will be selected.

Reported field: Text1 ▼

5. In the "Difference field" drop-down list select the Microsoft® Project's field that will contain updated from Seavus Project Viewer. In this example, the "Text 2" will be selected.

Difference field: 

6. In the “Graphical Indicator” drop-down list select the Microsoft® Project’s field that will contain updated from Seavus Project Viewer™. In this example, the “Text 3” will be selected.

Graph. indicator: 

Distribute the project plan

After performing all these steps, you can place the project file on shared location where all team member have access. Common practice in the project management is to receive the updates at the end of the business day.

Chapter 4: Example for receiving updates

In this section you will learn:

- ✓ Make project collaborative
- ✓ Receive project's updates

Introduction

In order to receive the updates using the Task Update option in your Microsoft® Project, your team members must insert updates for their tasks or assignments. The updates can be accepted or rejected, depends from the manager's opinion and the real status of the project tasks.

Getting updates - % Complete

Once the updates are inserted by the team members, project managers can upload the tasks or assignment progress and analyze the current status of the project.

For that purpose, follow the next instructions:

1. Open the project plan that should be updated
2. From the "Add-ins" ribbon click on the "Get Updates" feature
3. In the newly opened dialog select which tasks updates will be accepted.
 - a. In case project manager accepts the updates than the task will be colored green.

<input type="checkbox"/>	Name	Current Percent Complete	Reported Percent Complete
<input checked="" type="checkbox"/>	Determine project scope	22%	100%

- b. In case the updated is rejected, then it will be colored red.

<input type="checkbox"/>	Name	Current Percent Complete	Reported Percent Complete
<input type="checkbox"/>	Determine project scope	22%	100%

4. The accepted and rejected tasks are presented on the image below.

Project Name: All Task Name: All Status: Pending

<input type="checkbox"/>	Name	Current Percent Complete	Reported Percent Complete	Current Actual Start	Reported Actual Start
<input type="checkbox"/>	Determine project scope	22%	100%		
<input type="checkbox"/>	Secure project sponsorship	0%	0%		
<input type="checkbox"/>	Define preliminary resources	50%	100%		
<input type="checkbox"/>	Secure core resources			NA	01/01/1970 01:00 AM
<input type="checkbox"/>	Conduct needs analysis	0%	25%		
<input type="checkbox"/>	Draft preliminary softwar...	0%	40%		
<input type="checkbox"/>	Develop preliminary budget	0%	55%		
<input type="checkbox"/>	Review software specific...	0%	98%		
<input type="checkbox"/>	Incorporate feedback on ...	0%	100%		

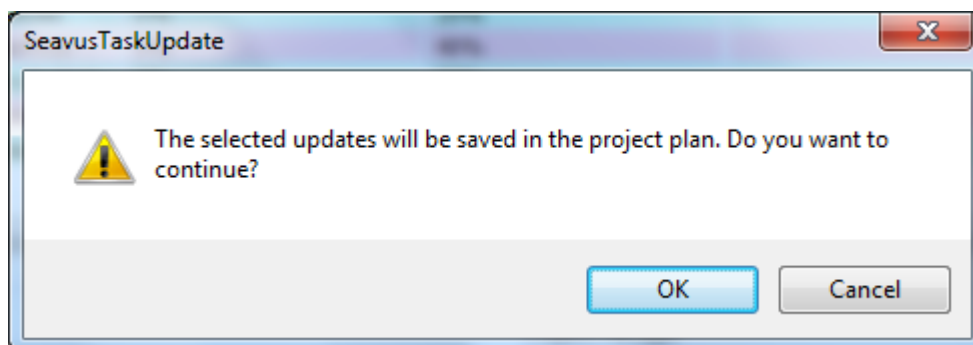
Comments

Team Member:

Project Manager:

Accept Reject Reset OK Cancel

5. After accepting and rejecting the updates and hitting the Ok button, the application will display notification window, where the project manager has to approve the continuity of the information flow.



After these steps, the project plan will be updated with the latest information from the team members, it can be undertaken for financial or scheduling analysis, while the updating cycle continues with the same processes that are described above.

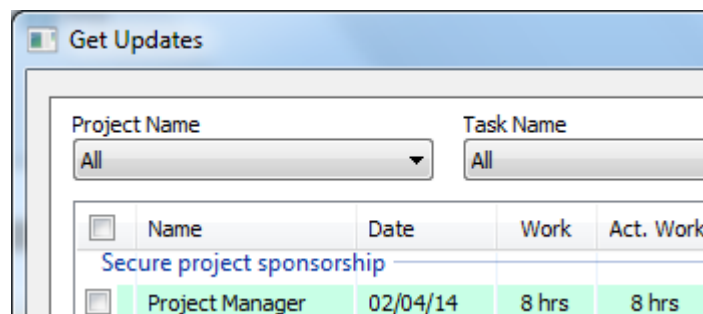
Note: The process of receiving task updates where team members updates % Work Complete, Actual Start, Actual Finish and Actual Duration is similar with the presented one.

Getting updated – Actual Work

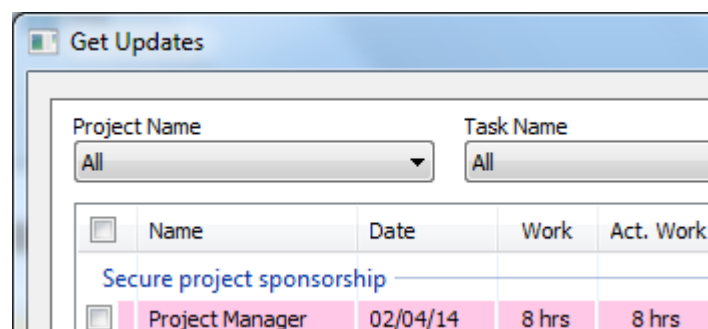
Getting updates for the “Actual Work”, is very similar to the process of updating the % Complete method. The only difference is in the “Get Updates” dialog.

For that purpose, follow the next instructions:

1. Open the project plan that should be updated
2. From the “Add-ins” ribbon click on the “Get Updates” feature
3. In the newly opened dialog select which assignment updates will be accepted.
 - a. In case project manager accepts the updates than the assignment will be colored green.



- b. In case the updated is rejected, then it will be colored red.



The accepted and rejected tasks are presented on the image below.

Get Updates

Project Name: All Task Name: All Resource Name: All Status: Pending

<input type="checkbox"/>	Name	Date	Work	Act. Work	Ovt. Work	Act. Ovt. Work	Last % Work Comp.	Rep. % Work Comp.
Secure project sponsorship								
<input type="checkbox"/>	Project Manager	02/04/14	8 hrs	8 hrs				
<input type="checkbox"/>	Project Manager	02/05/14	8 hrs	8 hrs				
Define preliminary resources								
<input type="checkbox"/>	Project Manager	02/07/14	8 hrs	8 hrs				
<input type="checkbox"/>	Project Manager	02/10/14	8 hrs	8 hrs				
Secure core resources								
<input type="checkbox"/>	HR Manager	02/11/14	8 hrs	8 hrs				
<input type="checkbox"/>	HR Manager	02/12/14	8 hrs	8 hrs				

Mark Assignment as Completed

Select the most appropriate action for your plan:

☒ None (Default)
☐ Update % Work Complete
☐ Update Actual Finish

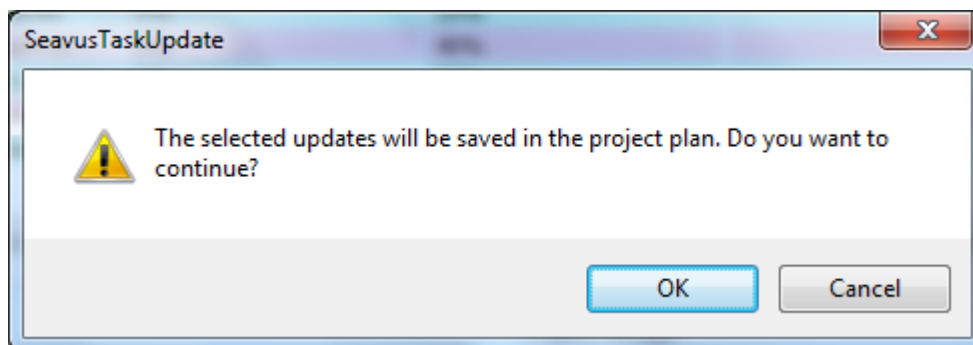
Comments

Team Member:

Project Manager:

Accept Reject Reset OK Cancel

- After accepting and rejecting the updates and hitting the Ok button, the application will display notification window, where the project manager has to approve the continuity of the information flow.



After these steps, the project plan will be updated with the latest information from the team members, it can be undertaken for financial or scheduling analysis, while the updating cycle continues with the same processes that are described above.

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