Project Management Step by Step Guide
Foreword

ADVISOR Enterprise is a Training Management System that drives training efficiency by (a) aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; (b) forecasting and comparing the costs of viable delivery options; (c) uncovering cost drivers; and (d) improving resource allocation. ADVISOR is built around the ADDIE model with the added flexibility of starting the analysis at any level. ADVISOR is made up of the following 6 modules that can be used separately or in any combination.

**Module #1 Training Analysis**

Analysis: To find out “who needs to be trained, on what and why”. Improves training decisions by identifying and prioritizing knowledge, skills and competencies needed by each job (position) to meet organization missions and goals. In addition to establishing a clear line of sight between employees' tasks and organization goals, ADVISOR assesses the need and priority for training using the Difficulty, Importance and Frequency (DIF) model. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis and Knowledge/Skill Gap Analysis].

**Module #2 Training Design**

Design: To find out “what is the most effective and economical way to deliver training”. Improves training decisions by rating the effectiveness as well as forecasting and comparing the costs of alternate blends of delivery options. In addition to maximizing training efficiency, ADVISOR minimizes costly errors by assessing the risks and impact of eLearning and training devices on learners, learning and organization. [Media Analysis, Cost Analysis and Training Plans].

**Module #3 Fidelity Analysis**

Develop: To find out the “fidelity requirements of training devices”. Determines the visual, tactile, olfactory, affective & auditory sensory cues requirements of training devices by taking into account who will use the training device; training requirements – i.e. the performance, enabling and learning objectives that will be addressed through the training device; synthetic environment requirements; and synthetic environment elements.

**Module #4 Resource Management**

Implementation: To find out “how much money and resources are needed”. Maximizes training efficiency by accurately forecasting and comparing budget, personnel and resources required for one or multiple training programs using various blends of delivery options. In addition to improving training decisions, ADVISOR facilitates project planning and resource management by forecasting money and resources needed to develop, deliver, administer, manage, maintain and support training programs over life cycle. [Forecast and Optimize Training Budgets, Personnel and Resources].

**Module #5 Project Management**

Implementation: To find out “how training should be implemented”. Keeps projects on time and within budget by developing program project plan, identifying critical paths/milestones, assigning personnel and resources as well as monitoring progress. In addition to anticipating potential problems and facilitating the implementation of corrective measures, ADVISOR improves resource allocation by tracking the utilization rates of personnel and resources. [Develop Project Plans and Track Progress].

**Module #6 Performance Analysis**

Evaluation: To find out “how training impacts performance and organizational goals”. Improves performance by zeroing in on the source of the problem and identifying solutions that produce the desired level of productivity. Moreover, ADVISOR highlights actions that will generate the greatest impact by assessing the feasibility of implementing plausible solutions as well as forecasting the costs, benefits and return on investment (ROI) of each intervention. [Performance Gap Analysis, Root Cause Analysis and Cost Benefit Analysis].
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Chapter 1: Project Management Overview

1.1 Introduction

Keeping projects on time and within budget is one of the greatest challenges for any project manager. To minimize delays and cost overruns, realistic project plans are needed to identify what needs to be done, when, and by whom; the time, money, personnel and resources needed for each task and phase; critical paths/milestones; interdependencies among various tasks - i.e., how delays in one task can impact others; and so forth. Since the best-laid plans can go awry, a tracking system is also critical for monitoring progress.

ADVISOR Enterprise is a web based project and resource management tool specifically designed for training managers. It forecasts time, money and resources needed to design, develop, administer, manage, deliver, maintain and support training programs; automatically generates project’s phases and tasks including time and money needed by each; facilitates the set-up of dependencies and constraints; speeds the development of project plan; manages the assignment of personnel and resources; as well as tracks progress in real time.

With viable project plans in hand and real time updates from the project team on hours worked and tasks completed, progress can be tracked, delays anticipated and corrective measures implemented to keep projects on-time and within budget. For more details, please refer to the Project Management User Guide. For info on basic functionality and how to configure ADVISOR in line with needs, please refer to the Configure ADVISOR Step by Step Guide. Remember that context sensitive help for each screen is also available by clicking the [Help] button.

1.2 Define Scope and Estimate Costs

Scope defines project requirements – i.e., the end results or deliverables. A major component of the Scope is the quality of the final product. For large projects, quality can have a significant impact on Time and/or Costs. The Scope of a training project is defined by the instructional goals; course length; trainees’ throughput; quality and frequency of graphics, audio and video; display, control, hardware, system, motion, audio and visual fidelity; delivery media, etc.

Based on course length, throughput, instructor to trainee ratio, attrition rate, development ratios, delivery media, rates paid for developers, managers, administrators, instructors, support and maintenance staff, and so forth, the effort and money needed to design, develop, administer, manage, deliver, maintain and support a training program is forecasted. Two approaches may be used to forecast training costs and resources. Details are provided in the Preliminary Analysis Step by Step Guide and Media Analysis Step by Step Guide; or the Training Design User Guide.
Chapter 2: Divide Project into Phases and Tasks

2.1 Introduction

Based on project scope, time and cost estimates, each project can be divided into Phases and Tasks that correspond to actions needed to setup, develop, deliver, support and maintain a training program. Budgetary costs and hours needed for each Phase can be retrieved from Course Analysis, if one has been conducted, and updated as needed.

Moreover, to maintain consistency and preserve data integrity, time and costs within each Phase can be harmonized with corresponding estimates generated under Course Analysis. In other words, should the time and/or cost requirements for the training program change, the time and funds allocated for the project plan can be updated accordingly.

2.2 Setup a New Project

To setup a project plan and monitor progress, i.e. to keep project on time and within budget:

Step 1: Click on the [Implement] tab, and click on the Projects folder.
Step 2: Click on the [Add] button.
Step 3: Input the Project Title, Start Date, the status of the project, etc. Data required by ADVISOR is identified by a red asterisk (*). Of course, the more data you provide, the better the results.
Step 4: Once all inputs are entered, click the [Save] button to create the project.

Notes:
➢ Once a project plan is defined, the entire schedule can be shifted (i.e., the Start and End Date of each Task) to the left or the right by the same number of days, by changing the Start Date, selecting yes for Change Tasks Date and clicking the [Save] button. The Start and End Date of each Task will be shifted by the following number of days: New Start Date – Current Start Date.
Only Projects “Underway” or “Pending” can be edited. Pending projects are not visible to team members (i.e., individuals assigned to various Tasks). “Completed” or “Cancelled” projects will appear to team members under the Completed Project folder in read only mode.

You may also share the analysis with colleagues (i.e., Users within the same Client) by clicking on the Sharing tab, placing checkmarks next to their names and clicking the Save button.

Once the project plan is completed or milestone reached, you can Archive the Project. This will create a duplicate copy of the project that can only be viewed in read only mode to preserve integrity. Changes to the current project will not impact archived data. To archive a project, click on the (project) node, then click on the Archive tab, input the Version Title and click Save. The date on which the archive was created is automatically saved.

You may view an archived version in read only mode, delete as well as recover (i.e., overwrite existing version) by clicking on the corresponding tabs. Of course, if a Project is deleted, all archived versions of the Project will be automatically deleted as well.

2.3 Link Project to Course Analysis

If a Course Analysis has been conducted (under the Course Analysis folder), you can link the Course to the Project to generate Phases needed to setup, develop, deliver, support and maintain the course – including the number of hours needed to complete each Phase and costs. To link a Course to a Project:

Step 1: Click on the (project title) node.
Step 2: Select Course Title under the Import Course field.
Step 3: Click [Save] to establish the link.
If the Project is linked to a Course, the Import Course Analysis node will appear. To import Course Analysis data:

**Step 4:** Click on Import Course Analysis node.

**Step 5:** Select data to be imported under the Delivery Option field.

**Step 6:** Click the [Save] button to setup Phases and allocate times and costs based on selected Delivery Option.

---

**Note:**
- Import will not impact Phases and Tasks that have been created under the Project. New Phases and Tasks will be added.

### 2.4 Divide Project into Phases

#### Create a Phase

To divide a Project into Phases:

**Step 1:** Click on the Phases folder.

**Step 2:** Click on the [Add] button.

**Step 3:** Input the Phase Title, # of hours needed to complete the Phase, cost and sequence.

**Step 4:** Click the [Save] button to create the new Phase.
Edit Phases Created from Course Analysis

If the Project is linked to a Course (Section 2.3), then Phases corresponding to actions needed to setup, develop, deliver, support and maintain the course – including # of hours needed to complete as well as out of pocket expenses are automatically generated and presented in read only mode. To change the Work [hours] or Cost of the Phase:

**Step 1:** Click on [Import Course Analysis] node.
**Step 2:** Turn the cascade option off ✗.

**Step 3:** Click on the [phase] node you want to edit (Development node, for example).
**Step 4:** Update the Work [hours] and Cost.
**Step 5:** Click [Save] to save changes.

**Note:**
- If the Work [hours] or Cost for a Phase are modified under Project Management, you can restore the original estimates from Course Analysis by clicking on the [Import Course Analysis] node, turning the cascade function back on ✗ and clicking [Save].
2.5 Setup Tasks for Each Phase

Each Phase can be further divided into Tasks; and each Task can be assigned a % of the Phase Work (hours) and Costs. To create a new Task:

**Step 1:** Click on **next to the [phase] node to expand [Project Planning] node, for example), and click on the Tasks folder.
**Step 2:** Click on the [Add] button.
**Step 3:** Input the Task Title, % of total work allocated to task, % of total cost allocated to task, whether or not it is a milestone and its sequence.
**Step 4:** Click the [Save] button to create the Task.

**Implications:**
- To preserve data integrity, users cannot directly specify the Work [hours] and Costs for each Task. These values are computed based on the Work [hours] and Costs of the Phase and % allocated to each Task, as follows:
  - Work [hours] for Task = Work [hours] for Phase x Work [% of Total] for Task / Sum of Work [hours] [% of Total] for all Tasks
  - Cost for Task = Cost for Phase x Cost [% of Total] for Task / Sum of Cost [% of Total] for all Tasks

**Note:**
- Each Phase should have a minimum of one Task. The first Task is automatically created by ADVISOR if the Phase is generated from Course Analysis. You may of course edit Task title and corresponding parameters by clicking on the [task title], editing the parameters and clicking on the [Save] button.
2.6 Summary

To facilitate the management of Tasks within a Phase:

**Step 1:** Click on the [Summary] node to view a list of Tasks in a tabular format.

**Step 2:** Specify the Sequence, Work (% of total) and Cost (% of total) for each Task.

**Step 3:** Click the [Save] button to automatically compute and update the Work [hours] and Costs allocated to each Task.

**Step 4:** You may also view and edit all Phases and Tasks within a Project by clicking on the Project Plan tab on the [Phases] folder.
**Step 5:** Specify the Sequence, Work (% of total) and Cost (% of total) for each Task.

**Step 6:** Click the [Save] button to automatically compute and update the Work [hours] and Costs allocated to each Task.

### BNH ADVISOR PROJECT PLAN

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Chapter 3: Generate Project Plan

3.1 Introduction

With the time and costs needed to perform each Task in place, we are ready to develop the Project Plan. This involves identifying and defining task dependencies and constraints, setting up a schedule, as well as assigning personnel and resources. Details are provided in the following sections.

3.2 Define Dependencies

To ensure that the Project Plan is accurate and realistic as well as to enable project managers to anticipate the impact of delays on schedule, dependencies among Tasks can be defined. In other words, the order in which activities should be performed. For example, the “Instructional Design” Task can only commence after “Front End Analysis” has been completed. To setup dependencies:

Step 1: Click on next to the Plan folder and on the next to the Dependencies folder. To facilitate the setup of dependencies, all project Tasks (defined in Section 2.5) are presented.

Step 2: To specify Task dependencies, click on (task title), (Instructional Design, for example).

Step 3: Select the Dependency, and specify the Lead or Lag time, if required.

Step 4: Click the [Save] button.

Notes:

- Three types of dependencies may be specified:
  - Finish to Start: Implies that the Task can only Start after this Task Ends
  - Start to Start: Implies that the Task can only Start after this Task Starts
  - Finish to Finish: Implies that the Task can only End after this Task Ends

- The dependency can be further qualified with Lead or Lag time. For example, if a Task can only Start 7 days after another Task is Finished, then in addition to specifying Finish to Start, input 7 under Lag Time [days]. If on the other hand, the Task can Start 10 days prior to the Finishing of another Task, then input 10 days under Lead Time [days].
3.3 Identify Constraints

To ensure that the Project Plan is accurate and realistic, as well as to enable project managers to anticipate potential problems, time constraints on various Tasks can be defined. To setup a constraint:

**Step 1:** Click on the [Constraint] node.
**Step 2:** Input the Constraint Type and Constraint Date.
**Step 3:** Click [Save] to save Constraints.

**Notes:**
- The following constraints can be defined for each Task:
  - As Soon As Possible. If the Task should be completed as soon as possible – a desired outcome with no impact on the schedule.
  - As Late As Possible. If the Task should be finished as late as possible – a desired outcome with no impact on the schedule.
  - Finish no Earlier Then. If the Task End Date should finish after the specified Constraint Date.
  - Finish no Later Then. If the Task End Date should finish before the specified Constraint Date.
  - Must Finish On. If the Task End Date should finish on or before the specified Constraint Date.
  - Must Start On. If the Task Start Date must begin on or before the specified Constraint Date.
  - Start No Earlier Then. If the Task Start Date must begin after the specified Constraint Date.
  - Start No Later Then. If the Task Start Date must begin before the specified Constraint Date.

**Implications:**
- When setting-up the schedule (Section 3.4), ADVISOR validates the Start and End Date of each Task against dependencies and constraints to ensure that all requirements are met.
3.4 Setup Schedule

Specify Start and End Dates

To create a Schedule:

Step 1: Click on the Schedule node.
Step 2: Input the Start and End Dates of each Task.
Step 3: Click [Save] to create the Project Schedule.

The Start and End Dates of each Task are validated against dependencies (Section 3.2) and constraints (Section 3.3). The schedule will only generate if all dates comply with dependencies and constraints. If there is a conflict, ADVISOR generates a list of violations or alerts, as shown below.
Auto Generate Start and End Dates

To facilitate the creation of a Schedule that meets dependencies and constraints. To generate:

**Step 1:** Click on the [Auto Generate] tab.
**Step 2:** Place checkmark next to Generate Schedule in line with Dependencies and Constraints field.
**Step 3:** Click [Save] to generate the Project Schedule.

**Notes:**
- [Auto Generate] takes into account:
  - Project Start Date
  - Time Required to Perform each Task
  - Time Off (i.e., weekends and holidays)
  - Constraints
  - Dependencies
  - Conflicts

- The Start and End Dates of each Task may be edited by clicking on the Schedule tab, making the required changes and clicking [Save].

- **Regenerate Schedule** option is also provided under dependencies (Section 3.2) and constraints (Section 3.3) when new dependencies and constraints that conflict with existing schedule are added.

- Duration Discrepancy is automatically calculated by ADVISOR by comparing Original Start and End Dates of Tasks with Actual Start and End Dates.
3.5 Assign Personnel & Resources

Once the timeline, effort and cost of each Task have been defined, personnel and resources needed to complete each Task can be assigned. To assign Personnel and Resources:

**Step 1:** Click on next to the Assign Personnel & Resources folder. All Project Tasks (defined in Section 2.5) are presented.

**Step 2:** Click on the (task) node to display Task’s Start and End Dates, # of hours required to complete and allocated budget under the [General] tab.

![Assign Personnel & Resources](image-url)
Assign Personnel

Step 3: Click on the [Personnel] tab. Individuals (Users) assigned to the same Client as this Project and classified as Project Team Members are presented (Chapter 4, Configure ADVISOR Step by Step Guide).

Step 4: To assign individuals to a Task, indicate the % of Work [Hours] to be completed by each individual. For example, if the Task requires 40 hours to complete and one individual is expected to perform all the work, then assign 100% under Work [% of Total]. If on the other hand, two individuals are needed to perform this Task and the work is divided equally between them, (i.e., 20 hours each), then assign 50% under Work [% of Total] for each individual.

Step 5: Indicate to whom the budget will be allocated by specifying the Cost [% of Total] for each individual.

Step 6: Input RSVP date to prompt team members to accept/reject assigned Tasks by the specified date.

Step 7: Click the [Save] button to save Personnel assignments.

Notes:

- To find out whether an individual is available to perform the Task, click on their [Calendar].

- To find out whether an individual has the necessary skills and attributes to perform the Task, click on their [Skills/Attributes].

- If an RSVP date has been assigned, the Task Status will display as “Pending” until it has been accepted or declined. Once accepted, the Status will change to “Accepted”. If the Task is declined, the Status will be updated to “Declined”.
Assign Resources

Step 8: Click on the [Resources] tab.

Step 9: To assign resources to the Task, indicate the number of hours needed under the Time [hours] column.

Step 10: Input RSVP Date if confirmation from Resource Manager is needed by a specific date.

Step 11: Click the [Save] button to save Resources assignments.

Note:
- Only Resources listed under Client’s [Inventory] folder are displayed. For details refer to ADVISOR Project Management User Guide.
- To find out whether the Resource is available, click on its [Calendar].
- To determine whether the Resource is suitable for the Task, click its [Description].
- If an RSVP date has been assigned, the Resource Status will display as “Pending” until it has been approved or declined by Resource Manager. Once approved, the Status will change to “Approved”. If the request is declined, the Status will be updated to “Declined”.
Email Notifications

Once individuals and resources are assigned to all Tasks, email notifications can be automatically generated and sent to each project team member and Resource Manager with relevant project details, and request for confirmation. To send email notifications:

**Step 12:** Click on the **Email Notification** node.

**Step 13:** Place checkmark next to the Notify project personnel & resource managers of changes field.

**Step 14:** Click [Save] to send email notifications.

**Notes:**
- The **Email Notification** node will only appear if new personnel and/or resources are assigned to a Task or if the timeline, effort or budgets for a Task that has been previously assigned to an individual has been modified.
- Once email notifications are sent, the **Email Notification** node disappears.
3.6 Generate Project Plan

To generate a Project Plan:

**Step 1:** Click on the [Project Plan] node.

**Step 2:** Specify the time period that you would like to examine as well as the level of details – i.e., daily or monthly.

**Step 3:** Click the [Save] button to generate the Project Plan.

The Project Plan for the specified time period is presented in a new window.

**Step 4:** You may export the report to Word, by clicking the [Generate Word Doc] button (top left corner). To return to ADVISOR, close the Report window.

**Notes:**
- The status of tasks is color coded as follows: Approved (green), Declined (red) or Pending (grey).
- Time off (i.e., weekends, holidays, etc.) for Client is indicated with vertical grey lines.
- % of work hours required to complete the Task is indicated after the individual’s name. It is computed as follows: # of Hours Required to Complete Task / # of Work Hours Available during the time period. In other words, 100% indicates that all of the individual’s working hours are needed to complete this task. Over 100% indicates that the individual will need to work overtime to meet obligations.
Chapter 4: Monitor Progress

4.1 Introduction

Once Project Plan is finalized, execution can begin. Keeping the project on-time and within budget requires a solid Project Plan as well as rigorous monitoring to anticipate and mitigate potential delays and cost overruns. The process used by ADVISOR to monitor progress is presented in this chapter.

4.2 Data Capture and Review

Since data from all users is stored in a centralized database, once a project team member updates the status of a Task, hours worked, money spent, % of work completed and so forth, the project details are automatically updated and compared to Project Plan to identify potential delays and cost overruns. To illustrate, a simple scenario is presented below.

**Project Manager:**

**Step 1:** Assigns Task to Mike Smith, an instructional designer.
**Instructional Designer (Mike Smith):**

**Step 2:** Can view Projects assigned to him in Step 1 by clicking on next to [Pending Project] folder under the [Personalize] tab (once he signs into ADVISOR).

**Step 3:** Can view Tasks assigned to him under each Project by clicking on the [project] node.

**Step 4:** Can accept or decline each assignment, by clicking on User Consent field and selecting response.

**Step 5:** Can notify the Project Manager of his decision by clicking [Save].

**Notes:**

- If Team Member requires approval from Supervisor (individual they report to) to accept assignments, then the Supervisor is also notified when Project Tasks are assigned to their subordinates. In this case, Supervisor’s approval will also be required before an assignment can be accepted. In other words, both Team Member and Supervisor can decline the assignment.

- Once the Team Member accepts or declines the assignment, the project will be automatically moved under the [Projects] folder or [Declined Projects] folder, accordingly. Moreover, the Status of the Tasks assigned to the Team Member (Step 1) will be updated and the Project Manager will be notified.

If the Instructional Designer (Mike Smith) accepted the Task, the Project is moved under the [Projects] folder. He can then periodically update the # of hours worked, money spent, % completed and Status of each Task, as follows:

**Step 6:** Click on next to the [Projects] folder and click the [project] node.

**Step 7:** Input # of hours worked, money spent, % completed, status and lock selections, as needed.

**Step 8:** Click [Save] to update the Project.
**Project Manager:**

**Step 9:** Once data is updated by the Instructional Designer (Mike Smith) and other team members (Steps 5 and 8), the Project Manager can review Project’s Status by clicking on next to the Track folder and clicking on the Progress node.

**Step 10:** Project Manager may also, Accept or Reject completed Tasks or Cancel Tasks that are no longer relevant under the Sign Off field. Once a Task is Accepted or Cancelled, it will be automatically moved to the Completed Projects folder and presented in read only mode to Team Members.

**Step 11:** Click [Save] to save responses.

**Instructional Designer (Mike Smith):**

**Step 12:** Once the Task’s Sign Off Status (Step 11) is updated by the Project Manager, the Instructional Designer (Mike Smith), can view the Status by clicking on the (project title) node under the Projects or Completed Projects folders.

**Note:** Once Project Task is completed, accepted or cancelled by Project Manager, it will be automatically moved to the Completed Projects folder and presented in read only mode. In other words, no further effort from the Instructional Designer (Mike Smith) will be needed.
### 4.3 Project Status Report

**Step 1:** To find out the status of a Project including Tasks that are on, ahead or behind schedule, click on the [Project Status] node under the [Track] folder.

**Step 2:** Specify the time period that you would like to examine as well as the level of details – i.e., daily or monthly.

**Step 3:** Click [Save] to generate the Project Status Report.

The Project Status for the specified period is presented in a new window.

<table>
<thead>
<tr>
<th>Task</th>
<th>Hours Planned</th>
<th>Hours Worked</th>
<th>Disparity</th>
<th>% Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brainstorm</td>
<td>56</td>
<td>31</td>
<td>12</td>
<td>60%</td>
</tr>
<tr>
<td>Activities</td>
<td>36</td>
<td>18</td>
<td>-18</td>
<td>50%</td>
</tr>
<tr>
<td>John Adams</td>
<td>11</td>
<td>2</td>
<td>10</td>
<td>100%</td>
</tr>
<tr>
<td>Larry Bird</td>
<td>11</td>
<td>1</td>
<td>10</td>
<td>100%</td>
</tr>
<tr>
<td>Mark Smith</td>
<td>11</td>
<td>0</td>
<td>11</td>
<td>0%</td>
</tr>
<tr>
<td>Mike Smith</td>
<td>11</td>
<td>0</td>
<td>11</td>
<td>0%</td>
</tr>
<tr>
<td>Create Project Plan</td>
<td>26</td>
<td>18</td>
<td>-8</td>
<td>80%</td>
</tr>
<tr>
<td>John Adams</td>
<td>11</td>
<td>9</td>
<td>2</td>
<td>20%</td>
</tr>
<tr>
<td>Larry Bird</td>
<td>23</td>
<td>20</td>
<td>3</td>
<td>80%</td>
</tr>
<tr>
<td>Mark Smith</td>
<td>10</td>
<td>0</td>
<td>10</td>
<td>0%</td>
</tr>
<tr>
<td>Needs Assessment</td>
<td>30</td>
<td>10</td>
<td>20</td>
<td>70%</td>
</tr>
<tr>
<td>John Adams</td>
<td>22</td>
<td>20</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>Larry Bird</td>
<td>11</td>
<td>10</td>
<td>1</td>
<td>90%</td>
</tr>
<tr>
<td>Mark Smith</td>
<td>11</td>
<td>0</td>
<td>11</td>
<td>0%</td>
</tr>
<tr>
<td>Mike Smith</td>
<td>11</td>
<td>0</td>
<td>11</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Notes:
- Phases as well as corresponding hours planned, worked, etc. are presented in blue.
- The progress bars of Tasks that are ahead of schedule are shown in green; the number of hours the Task is ahead of schedule is indicated under the Disparity column along with % Completed. In the example above, the Brainstorm Task is 2 hours ahead of schedule.
- The progress bars of Tasks that are behind schedule are shown in red; and the number of hours the Task is behind schedule is indicated under the Disparity column as well.
4.4 Export to MS Project

To export Project Plan to MS Project:

**Step 1:** Click on the Export node.
**Step 2:** Right click on “project.mpx”, and select Save Target As.
**Step 3:** Specify the file name and directory and click [Save].

**Note:**
- If MS Project is installed on your computer, you can open the Project Plan in MS Project by clicking on “project.mpx” link.
Chapter 5: Generate Reports

5.1 Personnel/Resource Allocation

To find out the planned utilization rates of various personnel and resources – i.e., whether we have the personnel and resources needed to undertake ongoing and upcoming projects? The planned utilization rate is based on the number of hours assigned to project team members on various projects relative to the number of available work hours. To generate Personnel/Resource Allocation report:

**Step 1:** Click on Reports tab. Next, click on next to the Manage Projects, Personnel & Resources folder and click on the Personnel/Resources Allocation folder.  
**Step 2:** Click on the [Add] button.  
**Step 3:** Input the Report Title, Select By (Personnel or Resources) and the Client that the report is assigned to.  
**Step 4:** Click [Save] to advance to the next screen.

Step 5: To compute the utilization rates of project team members within a specific time period, input the Start and End Dates, the Client and whether personnel within Sub Divisions should also be included. You may filter personnel further by Skill and/or Attribute. For example, limit the report to Instructional Designers or Project Managers with a Top Secret clearance.

**Step 6:** Click [Save] to generate Personnel Utilization rate.
The report is presented in html format, in a new window.

**Step 7:** You may export the report to Excel by clicking the [Generate Excel] button (top left corner).

**Step 8:** To view a daily breakdown of the utilization rates of a specific individual, click on the individual’s name.
To return to ADVISOR, close the Report window.

**Mark Smith**

**February 2018**

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1 Hours: 2.08 Rate: 29.73%</td>
<td>2 Hours: 2.38 Rate: 29.73%</td>
<td></td>
</tr>
<tr>
<td>4 Hours: 0 Rate:</td>
<td>5 Hours: 2.08 Rate: 29.73%</td>
<td>6 Hours: 2.08 Rate: 29.73%</td>
<td>7 Hours: 2.38 Rate: 29.73%</td>
<td>8 Hours: 4.04 Rate: 57.69%</td>
<td>9 Hours: 4.62 Rate: 57.69%</td>
<td>10 Hours: 0 Rate:</td>
</tr>
<tr>
<td>11 Hours: 0 Rate:</td>
<td>12 Hours: 4.04 Rate: 57.69%</td>
<td>13 Hours: 4.04 Rate: 57.69%</td>
<td>14 Hours: 4.62 Rate: 57.69%</td>
<td>15 Hours: 4.04 Rate: 57.69%</td>
<td>16 Hours: 4.62 Rate: 57.69%</td>
<td>17 Hours: 0 Rate:</td>
</tr>
<tr>
<td>18 Hours: 0 Rate:</td>
<td>19 Hours: 2.08 Rate: 29.73%</td>
<td>20 Hours: 2.08 Rate: 29.73%</td>
<td>21 Hours: 2.38 Rate: 29.73%</td>
<td>22 Hours: 2.08 Rate: 29.73%</td>
<td>23 Hours: 2.38 Rate: 29.73%</td>
<td>24 Hours: 0 Rate:</td>
</tr>
<tr>
<td>25 Hours: 0 Rate:</td>
<td>26 Hours: 1.08 Rate: 15.44%</td>
<td>27 Hours: 1.08 Rate: 15.44%</td>
<td>28 Hours: 1.24 Rate: 15.44%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**March 2018**

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1 Hours: 1.08 Rate: 15.44%</td>
<td>2 Hours: 1.24 Rate: 15.44%</td>
<td></td>
</tr>
<tr>
<td>4 Hours: 0 Rate:</td>
<td>5 Hours: 1.08 Rate: 15.44%</td>
<td>6 Hours: 1.08 Rate: 15.44%</td>
<td>7 Hours: 1.24 Rate: 15.44%</td>
<td>8 Hours: 1.08 Rate: 15.44%</td>
<td>9 Hours: 1.24 Rate: 15.44%</td>
<td>10 Hours: 0 Rate:</td>
</tr>
<tr>
<td>11 Hours: 0 Rate:</td>
<td>12 Hours: 1.08 Rate: 15.44%</td>
<td>13 Hours: 1.08 Rate: 15.44%</td>
<td>14 Hours: 1.24 Rate: 15.44%</td>
<td>15 Hours: 1.08 Rate: 15.44%</td>
<td>16 Hours: 1.24 Rate: 15.44%</td>
<td>17 Hours: 0 Rate:</td>
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<tr>
<td>18 Hours: 0 Rate:</td>
<td>19 Hours: 1.08 Rate: 15.44%</td>
<td>20 Hours: 1.08 Rate: 15.44%</td>
<td>21 Hours: 1.24 Rate: 15.44%</td>
<td>22 Hours: 1.08 Rate: 15.44%</td>
<td>23 Hours: 1.24 Rate: 15.44%</td>
<td>24 Hours: 0 Rate:</td>
</tr>
<tr>
<td>25 Hours: 0 Rate:</td>
<td>26 Hours: 1.08 Rate: 15.44%</td>
<td>27 Hours: 1.08 Rate: 15.44%</td>
<td>28 Hours: 1.24 Rate: 15.44%</td>
<td>29 Hours: 1.08 Rate: 15.44%</td>
<td>30 Hours: 1.24 Rate: 15.44%</td>
<td>31 Hours: 0 Rate:</td>
</tr>
</tbody>
</table>

**Notes:**
- 100% utilization rate is the optimal state – i.e., all available work hours are allocated to specific projects. Above 100% implies that assigned work exceeds available work hours – in other words, individual would have to work overtime or additional personnel are needed to meet commitments.
5.2 Personnel Calendar

To find out who is doing what at any given time – including projects/tasks assigned to them, time off, and so forth, etc. To generate:

**Step 1:** Click on next to the Manage Projects, Personnel & Resources folder and click on the Personnel Calendar folder.

**Step 2:** Click on the [Add] button.

**Step 3:** Input the Report Title, Select By (i.e., Personnel or Client) and the Client that the report is assigned to.

**Step 4:** Click [Save] to advance to the next screen.

**Step 5:** Input the Start and End Dates for the desired time period, and select individuals to be included in report.

**Step 6:** Click [Save] to generate.
Step 7: You can export the report to Word by clicking the [Generate Word Doc] button (top left corner).

Step 8: To return to ADVISOR, close the Report window.
5.3 Projects Status

To find out the status of multiple projects within any time period. To generate:

**Step 1:** Click on next to the Manage Projects, Personnel & Resources folder and click on the Projects Status folder.

**Step 2:** Click on the [Add] button.

**Step 3:** Input the Report Title, Select By (i.e., Project or Client) and the Client that the report is assigned to.

**Step 4:** Click [Save] to advance to the next screen.

**Step 5:** Input the Start and End Dates for the desired time period and select Projects to be included in the report.

**Step 6:** Click [Save] to generate.
Step 7: You can export the report to Word by clicking the [Generate Word Doc] button (top left corner).

Step 8: To return to ADVISOR, close the Report window.