



Project Status Updates

This worksheet is a supplement to Kolme University's [Project Status Updates](#) course. Project status updates are often used for project governance and for executive communication. This configuration will assist in providing users a method of providing project status updates and displaying those within a report.

Create a Project Status Update Form and Report:

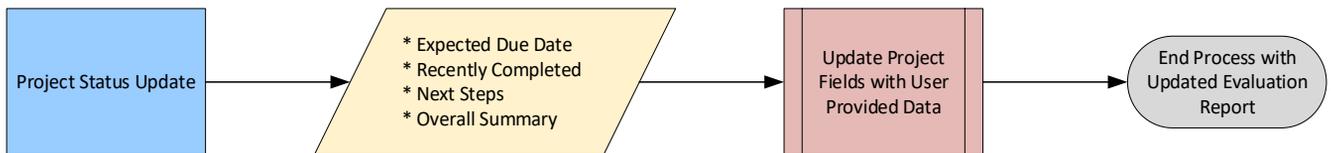
- Identify the required KPIs for the project updates.
- Prepare the environment for the project status update configuration
- Configure the project status custom action
- Create the project status update report
- Test & Confirm the results meet stakeholder needs.

Prerequisites

AdaptiveWork Environment

- ✓ AdaptiveWork environment - Sandbox recommended
- ✓ AdaptiveWork administrative access
- ✓ Usage quota allowing for 1 custom action and 4 custom fields
- ✓ Basic AdaptiveWork Technical Skills

Configuration Diagram:



Need Help?

Looking to learn more with these or other AdaptiveWork configurations? Check out our additional Kolme University courses and learning paths to gain in-depth knowledge or engage our experts: PPMAnswers@Kolmegroup.com

About Kolme University

Kolme University is the educational branch of Kolme Group, a team of experienced project and portfolio consultants who will help you triumph ahead of schedule.

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Project Status Updates: Components Configuration Lists

Configuration	Object	Name	Purpose
Custom Action	Project	Project Status Update	Launches a form for Project Managers to provide their project status update notes and pushes that data to the appropriate project fields.
Custom Field	Project	Expected Due Date	Captures the date that the project manager expects the project to complete
Custom Field	Project	Recently Completed	Text Area to capture the most recent activities of a project
Custom Field	Project	Next Steps	Text Area to capture the upcoming activities of a project
Standard Field	Project	Overall Summary	Current Overall Summary note from the Project Manager
Custom Field	Project	Project Status Last Update	Captures the date that the last project status update was performed

Use this section during the “Stop and Reflect” portion of the course to fill in your answers:

What KPIs need to be captured during a project status update?

➤ _____

How frequently should projects be updated?

➤ _____

Who is the audience for the Project Status Update report?

➤ _____
