



Accepting Task Updates in Project Online / Project Server 2016

By: Collin Quiring

This document explains the steps for a Project Manager to view and accept (or reject) task updates. This is for Project Online or for Project Server 2016. They both work the same.

When a task is update in a project file and you are the Project Manager you will have an approval available to you. In PWA, if you go to the Approvals section you will see the updates that have been sent to you.

To keep this example simple, we have only one resource that has updated two different tasks. In a normal scenario, you would have a batch of updates from multiple resources across multiple projects.

This is how my Approval screen appears initially:

Approval Type	Name ↑	Project	Update Type	Resource
<input type="checkbox"/> Status Update	Receive notice to proceed and s	Building Foundation	Task update	Collin Quiring
<input type="checkbox"/> Status Update	Submit bond and insurance doc	Building Foundation	Task update	Collin Quiring

I can see that the Resource updated two separate tasks for the “Building Foundation” project.

But, what was updated?

The quick and easy way to see what was updated is to scroll to the right until I see something in red (normally, we like the simple saying of “Green is good and Red is bad” when talking about indicators or font colors but in this screen it just indicates a change – not whether or not it is a good or bad change).

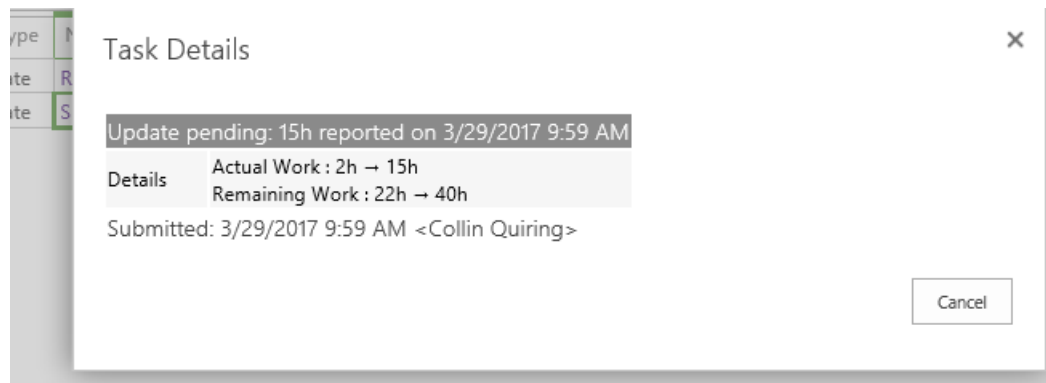


In this case, we see that the hours were changed.

	Start	Finish	Total	% Complete	Remaining Wor	Task
	4/3/2017	4/7/2017	15h	38%	25h	Gene
	4/5/2017	4/12/2017	15h	36%	27h	Gene

However, you might want to get a bit more detail about EXACTLY what was changed and what the field was prior to the update. This information can be obtained by selecting the task name. A Task Details pop up appears that will show what was changed.

In this case, we see that the Actual Work was updated from 2 to 15 hours and the Remaining Work was extended from 22 to 40 hours.



If you are wondering how this affected the overall schedule you can select the tasks that were updated for this schedule and then select the Preview Updates option from the ribbon.



SHOWSE APPROVALS

Accept Reject Preview Updates Scroll To Update

Outline Filter: No Filter Group By: No Group

From: 2/9/2015 Set Date To: 5/9/2015

Planned Overtime

Export to Excel Print

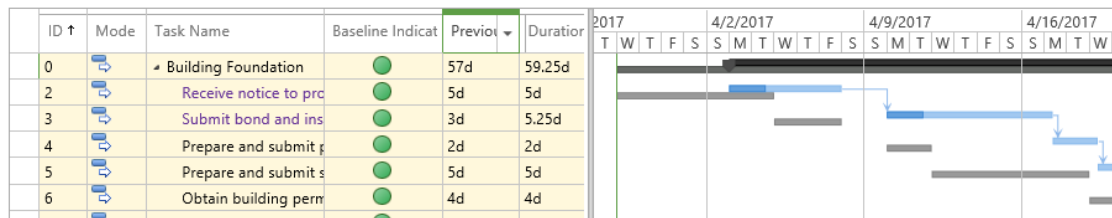
Actions Data Date Range Share Sho

Projects
 Approvals
 Tasks
 Timesheet

Approval Type	Name ↑	Project	Upda
<input checked="" type="checkbox"/>	Status Update	Receive notice to proceed and s	Building Foundation
<input checked="" type="checkbox"/>	Status Update	Submit bond and insurance doc	Building Foundation

This will open the preview of the schedule in a separate tab. In our case, because the task was extended, we can see how our overall schedule is no longer on time. The gray line is the visual representation of where the task was BEFORE the update and the blue line is where the task is AFTER the update (assuming we accept and publish this update as is). The dark blue is the amount of the task that is completed and the light blue is the incomplete part.

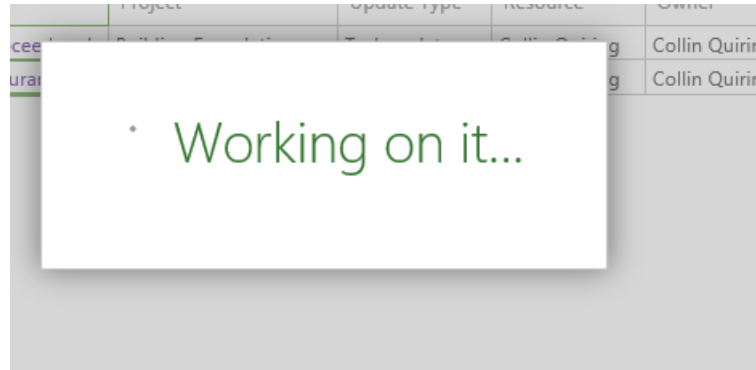
This shows what the plan will look like if you accept the selected task update requests.



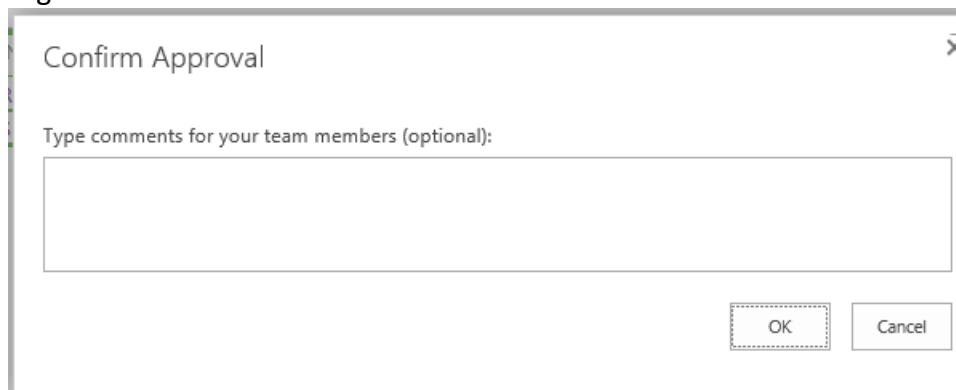
After reviewing the updates effects on your project’s schedule, you can close this tab.

To actually Accept (or Reject) the update(s), just select the updates and click on Accept from the ribbon.

You should see the Working on it box



Then, you will probably see the Confirm Approval box. This is where you can type comments that will be sent to all the resources that made the updates – this is NOT a single task note or comment – this is for the updates that you are accepting or rejecting.

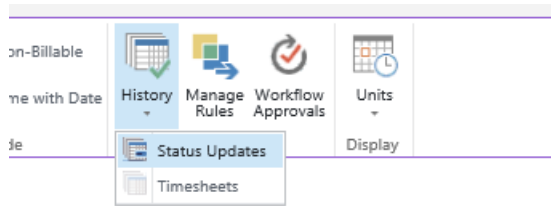


If you choose to enter nothing, just select OK. (Selecting cancel means that nothing happens and your update starts over and you have to re-select Accept.)

Once you have accepted Approvals you will see a message in the Approval box saying you have no new approvals at this time.

There are no new approvals to review at this time. If you have published your plan and still do not see approvals, have your resources submit updates from "Tasks" or "Timesheet."

YOU ARE NOT YET DONE. You have accepted (or rejected) the update but it still needs to be published. The easiest way to publish and without having to open up Project Professional is to stay in the Approval screen, select History from the ribbon and then select Status Updates:



If you still do not see approvals, have your resources submit updates

A new screen will open showing the Status Updates History page.
Note – if you see Pending as the status, that just means that the update is still in the queue.

	Approval Date	Action	Status	Info	Task Name
<input type="checkbox"/>	3/29/2017 10:15	Accepted	Pending	These task updates	Receive nc
<input type="checkbox"/>	3/29/2017 10:15	Accepted	Pending	These task updates	Submit bo

Once you see the Status of "Unpublished" you can select the updates you want to publish and you can select Publish from the ribbon.



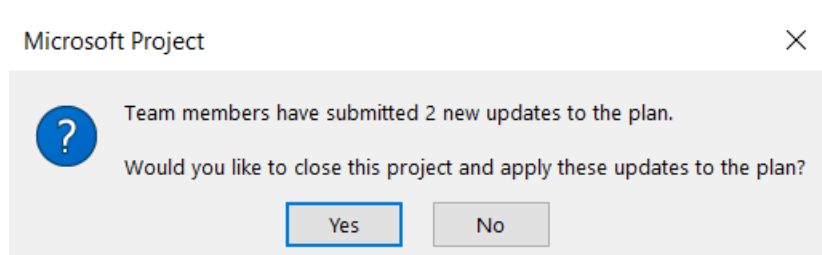
	Approval Date	Action	Status	Info	Task Name
<input type="checkbox"/>	3/29/2017 10:15	Accepted	Unpublished	Incomplete	Receive
<input type="checkbox"/>	3/29/2017 10:15	Accepted	Unpublished	Incomplete	Submit

Note – seeing an info column of “Incomplete” just means that the task is not completed, it does not mean anything in regards to the update process.

After you select the tasks you want to publish and you select Publish from the ribbon you will see a message stating the Status and Publish Submitted.

One more variable – what happens is somebody does an update and you open Project Professional before you go through the PWA approval screens?

Well, when you open Professional, you will get a pop up box with a message telling you that you have Team member updates.



And, when you select Yes to do the updates, the Approval center page will open for you and in Professional you will receive a message that tells you to finish you updates there and then come back.

