Adding & Updating Project Indicators

Definitions

Indicator (project): Information about a project presented in a consistent format that points to a current project status, trend, or need for action. Each project indicator comprises measurable actions that affect the overall indicator. Providing progress updates on each action allows project managers to report on indicator trends.

Leading indicator: This type of indicator can be measured before a task is complete, with the intention of working toward a measurable goal.

Lagging indicator: This type of indicator can be measured after a task is complete, to see if a goal has been achieved.

Icons in this job aid

Steps

Open the Project Indicator Template

2. Click Work to open the Work Menu.

3. In the Work menu, show Work, select the work (project) you need, then choose Work and Resource Management in the action menu.
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4. Change Column Set to **00 – Indicator Updates**.

Add Indicators to the Template

1. Double-click inside a **Lagging Indicator** cell to edit its title.

2. Double-click inside a **Leading Indicator** cell to edit its title.

3. Repeat until all indicators are added.

   See the definitions at the top of this job aid if you need help determining whether an indicator is leading or lagging.
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4. Double-click in the **Indicator Measure** column for each indicator to choose the data type your action measures.

   ![Indicator Measure Table]

5. Double-click in the **Indicator Baseline Start Value** column to update your baseline for this action.

   ![Baseline Start Value Table]

6. Double-click in the **Indicator Target Value** column to update your target for this action.

   ![Target Value Table]

Each template comes with two leading and two lagging indicators by default, each with three update rows. To add more indicators, follow the section below. If this is sufficient, proceed to the section called **Updating Indicator Progress**.
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Creating Additional Indicators in the Template

The easiest way to add a new indicator with corresponding actions to the template is to copy and paste from the template. Follow these steps.

1. Click to highlight the row you want to copy, either a Lagging Indicator or a Leading indicator.

   ![Lagging Indicator row highlighted](image1)

2. Right click in the highlighted row, then click the **Copy** icon.

   ![Copy icon](image2)

3. Right click in the Phase row of the indicator you copied, and click **Paste**.

   ![Paste icon](image3)

4. Your new Indicator section appears as part of your project template. Edit the indicator using the steps above.

Repeat the steps in the above sections above as needed to capture all of the project’s indicators and measured actions.
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Update Indicator Progress

1. Once your indicators and baseline values are added, you can update indicator progress as needed by returning to the Work and Resource Management screen.

2. Each indicator comes with 3 lines for updates by default. You can double click to change the name of each update, but you may leave them at their default values of “Update 1,” “Update 2,” and “Update 3.”

3. When you need to update indicator progress, double-click in the Date of Indicator Update column to note the date of the progress update. Double-click in the Indicator Measure Value column to update the progress.

4. Close the Work and Resource Management screen when progress updates are complete.