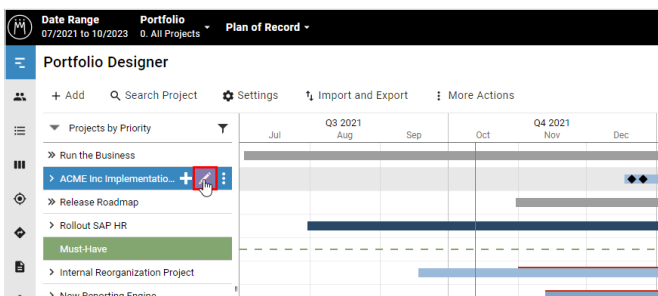**MEISTERPLAN**

Your Quick Guide to Project Manager Tasks in Meisterplan

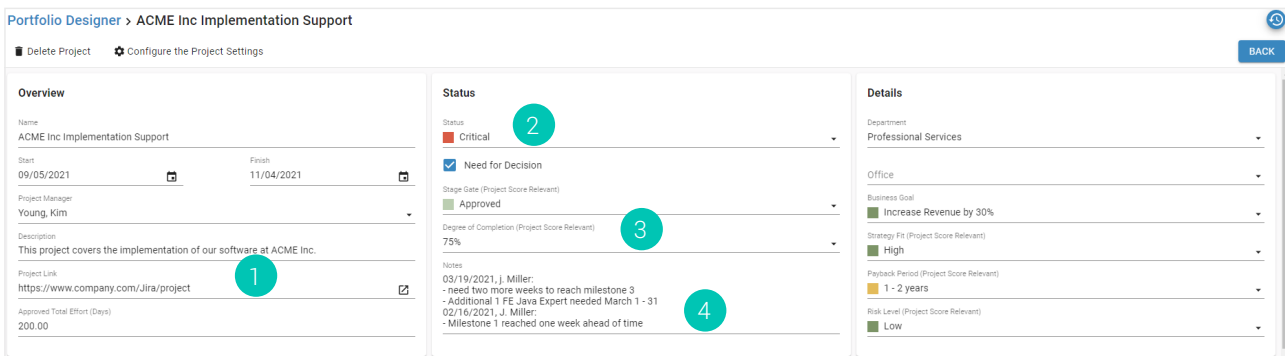## Updating the Status and Requirements of Your Projects

Give management visiblity into project updates and needs.

Where to Start

Locate your projects in the main dashboard (Portfolio Designer) in Meisterplan. Click on the **pencil icon** next to the project that needs to be updated.

What to Do

1. **Project Link (optional):** Link a URL to your project plan or status report (e.g., link to a project in MS Project Online, Jira, or another project management tool).

2. **Status:** Choose the status of your project, e.g., red-critical, yellow-needs attention, green-no issues, (actual values depend on your specific configuration). This lets the project coordinator know which projects need attention. Click on **Need for Decision** if a decision needs to be made about the project..

3. **Degree of Completion:** This communicates how close your project is to completion.

4. **Notes:**
   - Initially document resource requirements for new projects during the planning phase.
   - Document resource and project schedule change requests as needed for active projects.
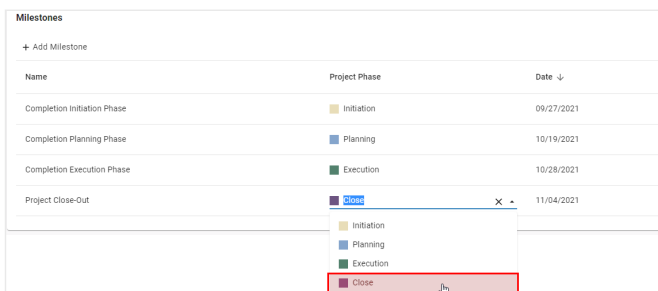
How to Work with Milestones and Project Phases

Milestones give a visual overview of a project's progress and can pinpoint when requirements will change.
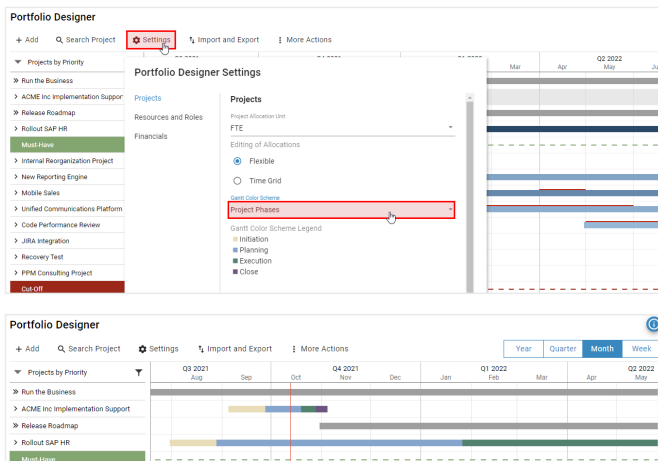
Add Milestones
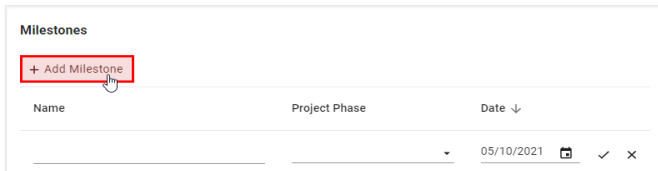
Go to the Milestones tab, to add milestones to your project and choose the dates when the milestones should be reached.

Link Milestones to Project Phases

Link your milestones to project phases to visually identify different phases, which can be referred to when requesting resources.

Visualize Project Phases

Under **Settings** choose **Project Phases** as the Gantt Color Scheme to visualize your project phases based on the milestones set.

> **!**
>
> **Please note:**
>
> Your Meisterplan user rights may vary as they are set by your administrator.