Progress Reports

Create a Progress Report

Once the Project Status is Cleanup/Construction, the Consultant, Applicant, Co-Owner, or Primary Contact will create a Progress Report with updates about the progress on the Project and submit it to PLIA for approval.

Navigate to the Project record, scroll down to Progress Reports and click 'New'.

Complete the following fields:

- Completed Activities
- Deviations from Required Tasks
- Deviations from Scope of Work
- Deviations from Schedule
- Future Deliverables

Save.

To allow the Owner/Consultant to view or edit the report **before** it's submitted to PLIA, click the icon under 'Owner' and select the corresponding Owner/Consultant user you would like to grant access to.

Click Change Owner.

Click on the Progress Report you just created.

Click Submit. Click Save.

When a Progress Report is submitted for approval by PLIA, Project Planner users will receive an email with a link to the report.

Clone a Monthly Progress Report

The Clone button can be used to simplify creation of multiple similar Monthly Progress Reports.

To clone a Monthly Progress Report, navigate to an existing Progress Report and click Clone.

Click Edit. Update the following fields:

- Completed Activities
- Deviations from Required Tasks
- Deviations from Scope of Work
- Deviations from Schedule
- Future Deliverables

Save.