Project Management: how-to guide

IntraSync
November 20, 2026

Project Management is the hub where a precast producer runs each job from contract award to completion. It keeps the project register, milestones and health, follows pieces through production and onto shipping loads, and holds the coordination work (submittals, RFIs, change orders, tasks, risks and issues, status updates and documents) in one place.

Written for: Project manager, Project coordinator, Production manager, Shipping coordinator, Operations lead, Administrator.

In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.

In this guide

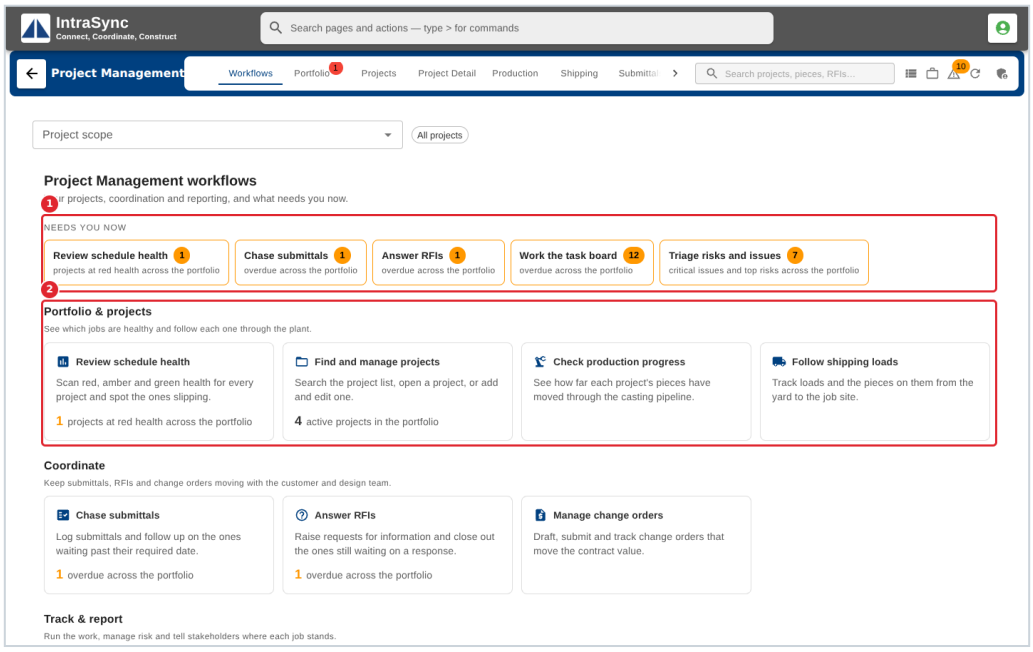
- 1. Find your way around the hub
- 2. Focus the hub on one project
- 3. Search for a project, piece, submittal, RFI or document
- 4. Check the health of every project
- 5. Create a project
- 6. Find, edit or delete a project
- 7. Read a project's detail
- 8. Add, complete and reforecast milestones
- 9. Track pieces through production
- 10. Plan a shipping load and mark it delivered
- 11. Log a submittal and record its return
- 12. Raise an RFI and record its answer
- 13. Raise and decide a change order
- 14. Work the task board
- 15. Log and close risks and issues
- 16. Post a status update
- 17. File a project document
- 18. Work through what needs attention
- 19. Check the module configuration and data health (administrators)
- 20. Maintain your company's product types (administrators)

1. Find your way around the hub

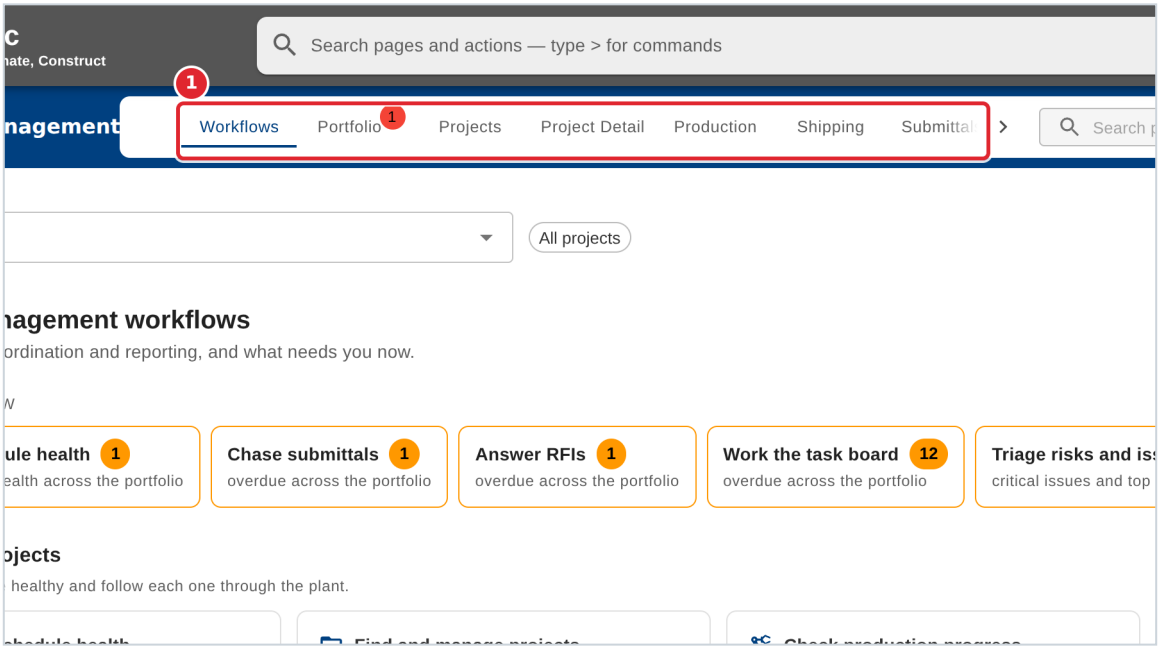
Start each day on the Workflows tab, which groups the hub's jobs by stage and puts what needs you first.

Before you start:

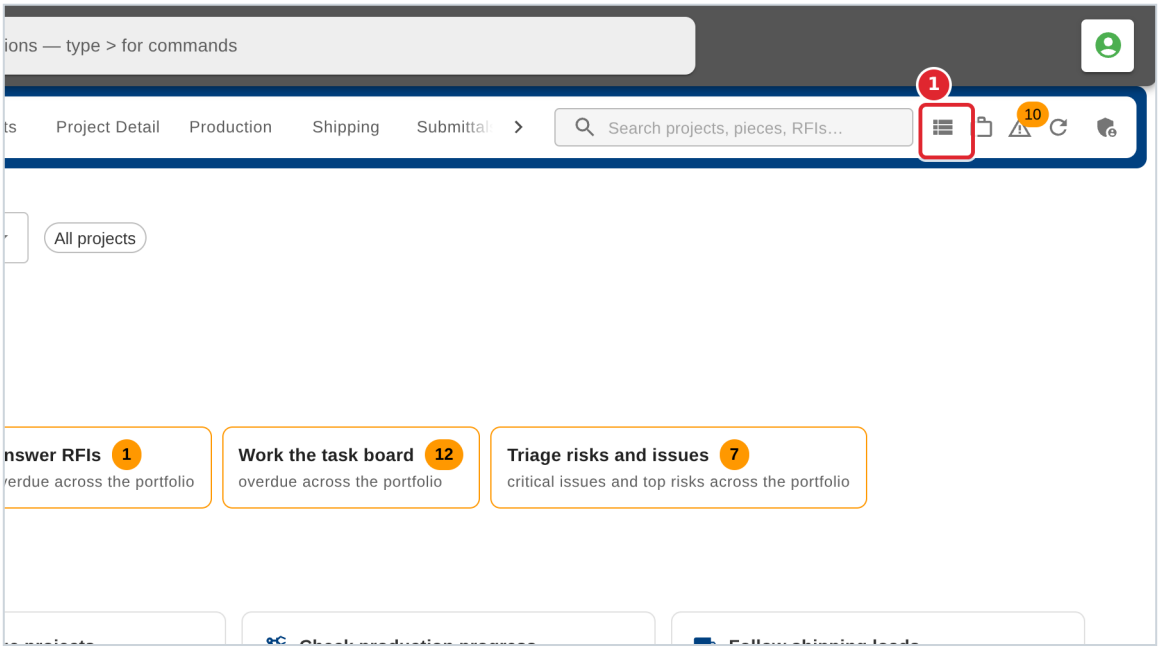
– You are signed in and have opened Project Management.



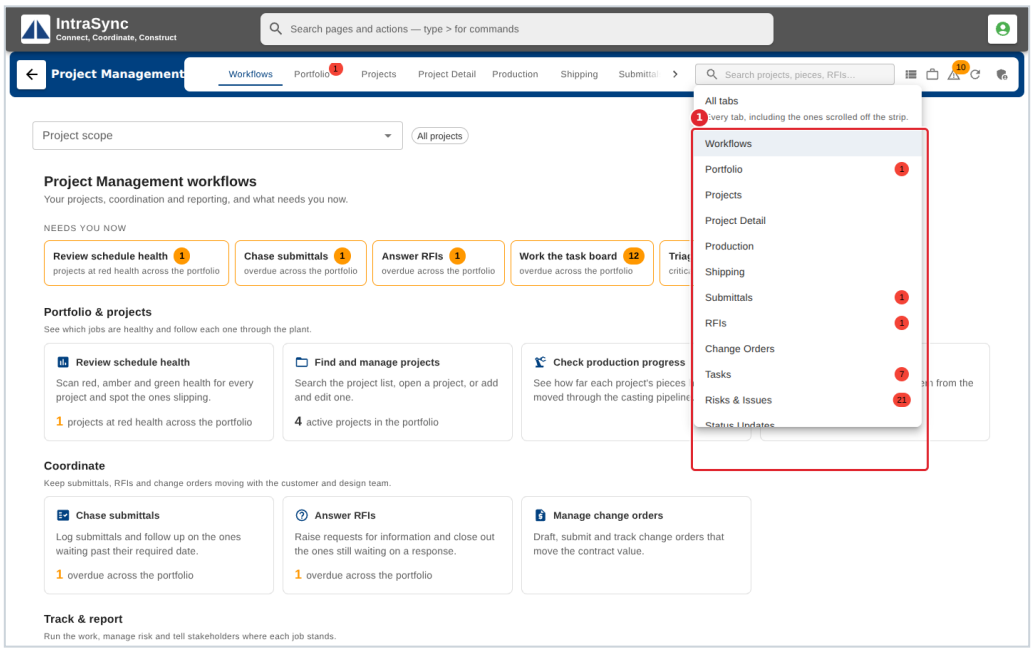
Step 1. Open Project Management. It opens on the Workflows tab.



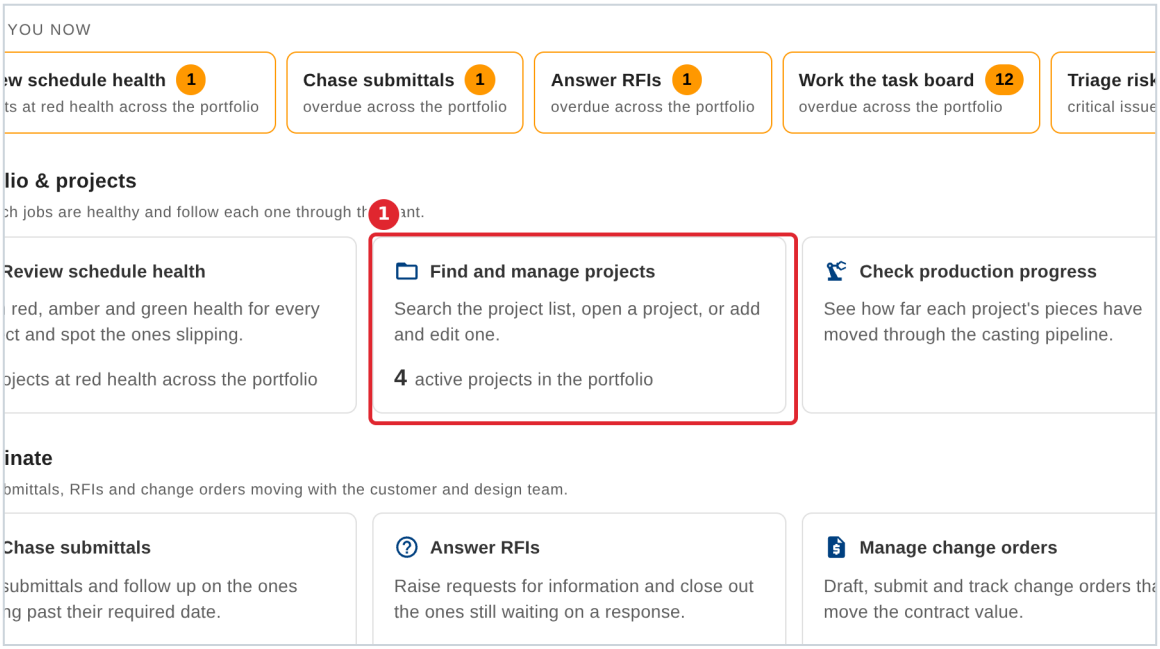
Step 2. Use the tab strip to move between the hub's areas.



Step 3. Select All tabs to see every tab, including the ones scrolled off the strip.



Step 4. Choose a tab from the list to open it.



Step 5. Select a workflow card to go straight to the tab that does that job.

Tips:

- The "Needs you now" strip counts only what is overdue or at risk. A card without a number simply opens its tab.
- On a narrow screen the tab strip becomes a Sections menu.

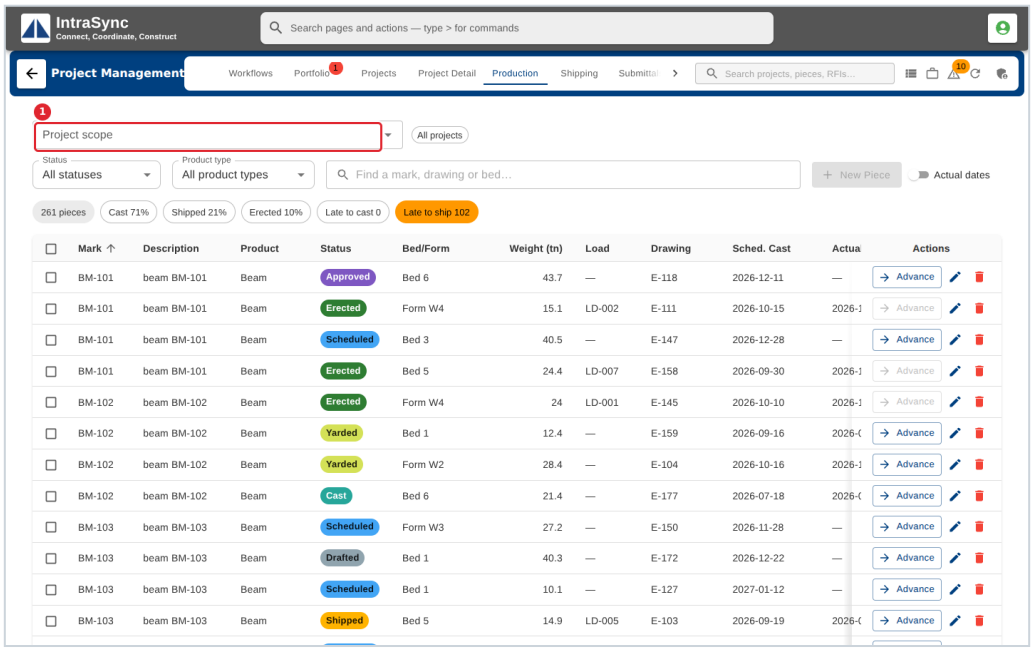
This is shown in the Project Management video at 0:03.

2. Focus the hub on one project

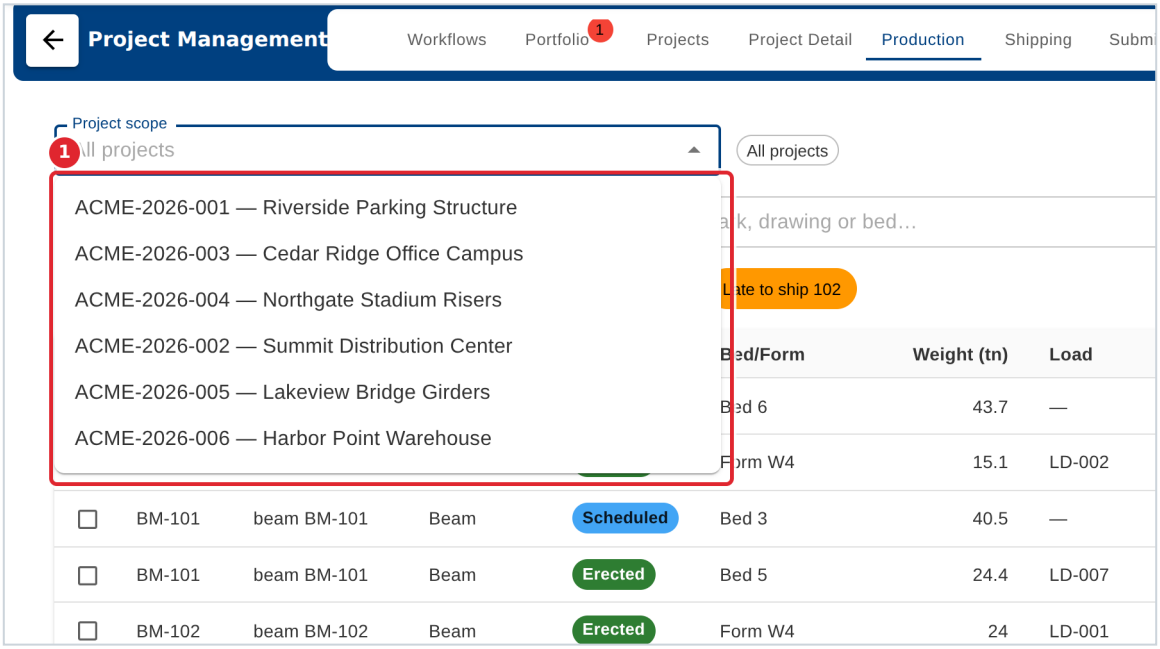
Scope the hub to one project so every tab shows only that project's records, and new records are filed against it.

Before you start:

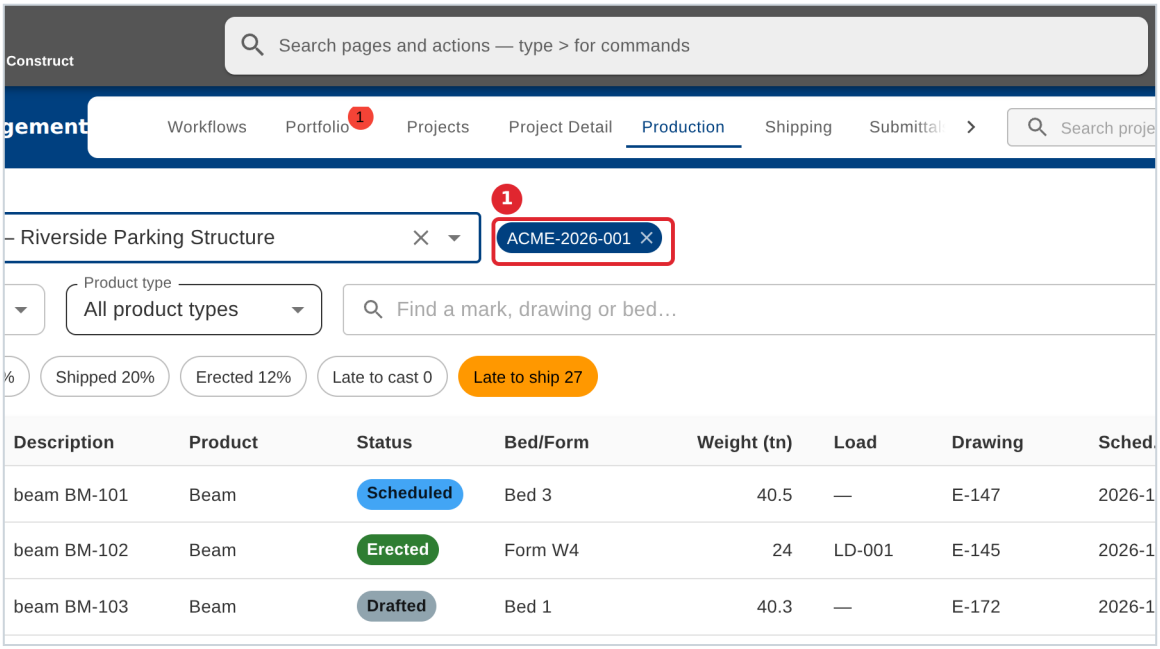
- The project exists on the Projects tab.



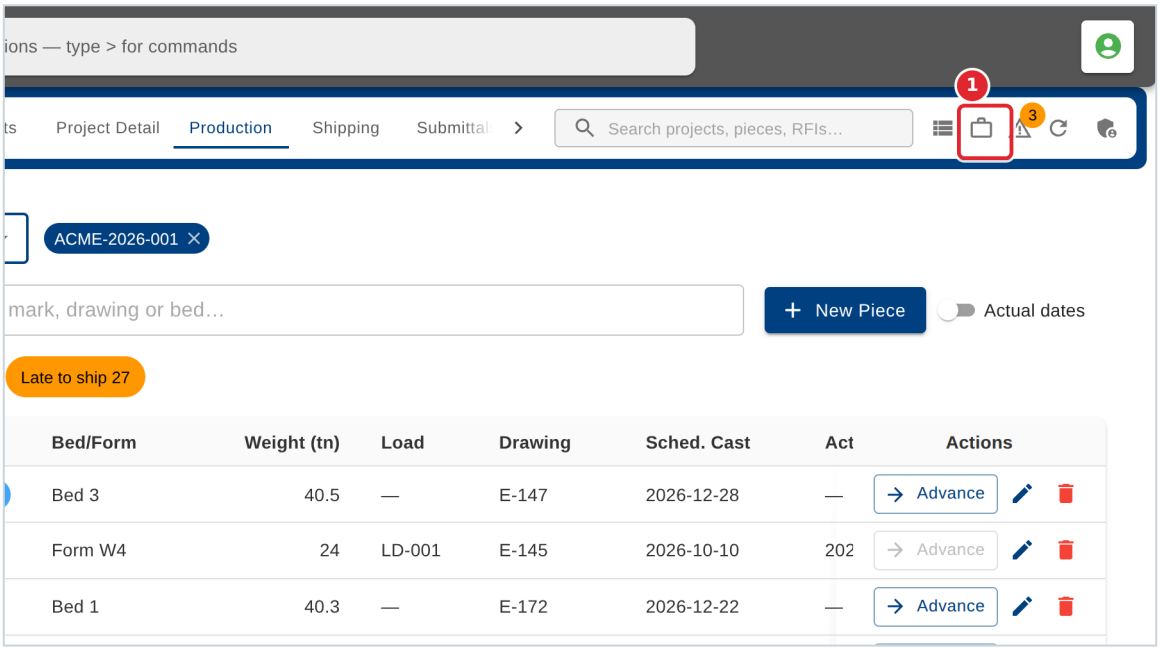
Step 1. On any tab that shows the Project scope field, select the field.



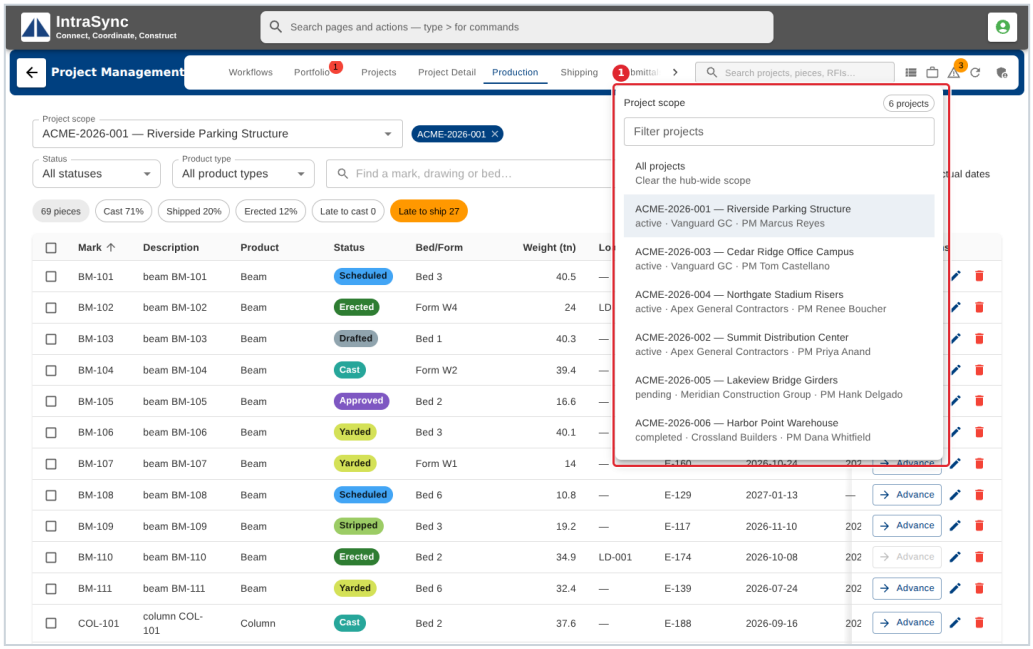
Step 2. Choose the project from the list, or type part of its number or name to narrow it.



Step 3. The chip shows the project in scope. Every tab now shows that project only. Select the cross on the chip to see all projects again.



Step 4. You can also set the scope from Project scope in the header.



Step 5. Filter the list, then choose a project, or choose All projects to clear the scope.

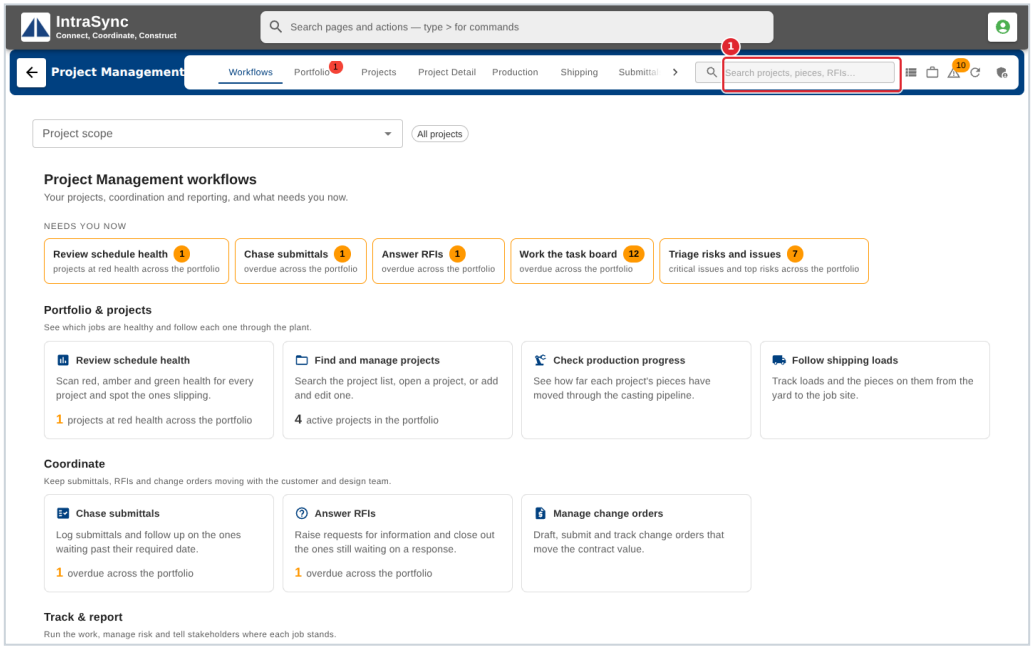
Tips:

- The scope stays as you move between tabs. Clear it to see every project again.
- Some actions need a project in scope: adding a piece, a load, a risk or an issue. Their buttons say so when none is chosen.
- Portfolio and Projects always show every project, so they have no Project scope field.

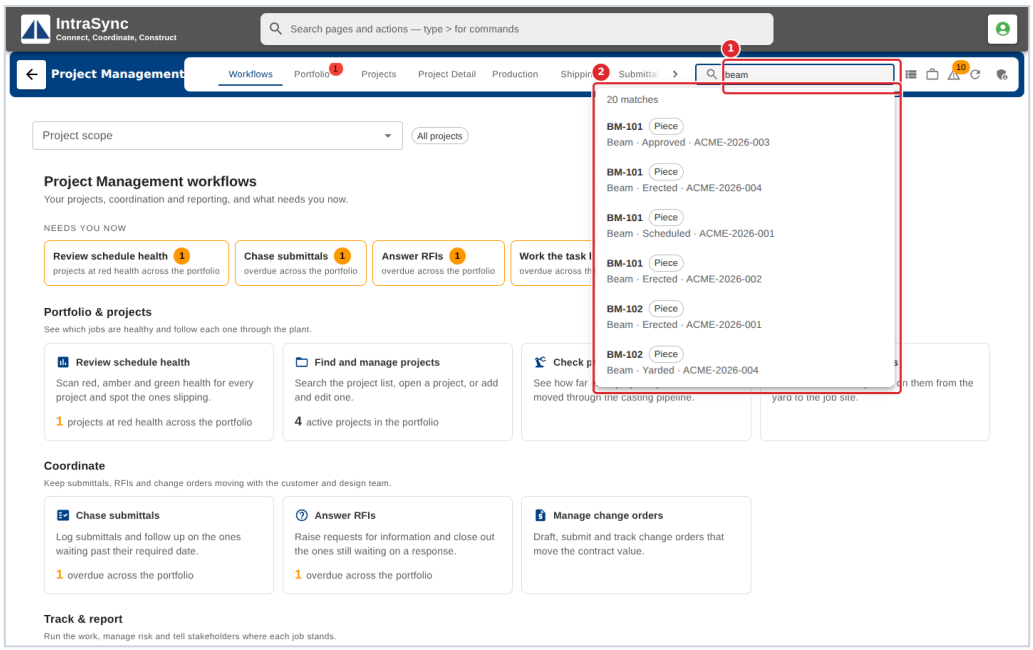
This is shown in the Project Management video at 0:30.

3. Search for a project, piece, submittal, RFI or document

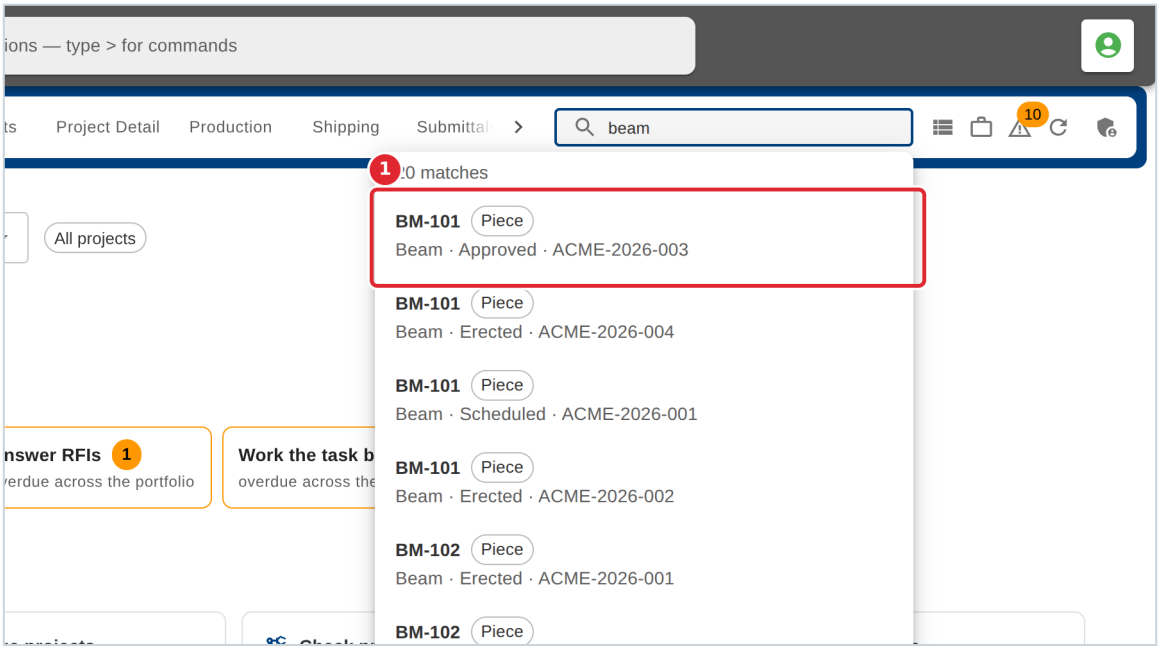
Jump straight to a record when you know a number, a mark or part of a name.



Step 1. Select the search box in the hub header.



Step 2. Type at least two characters. Matching projects, pieces, submittals, RFIs and documents appear, each marked with what it is.



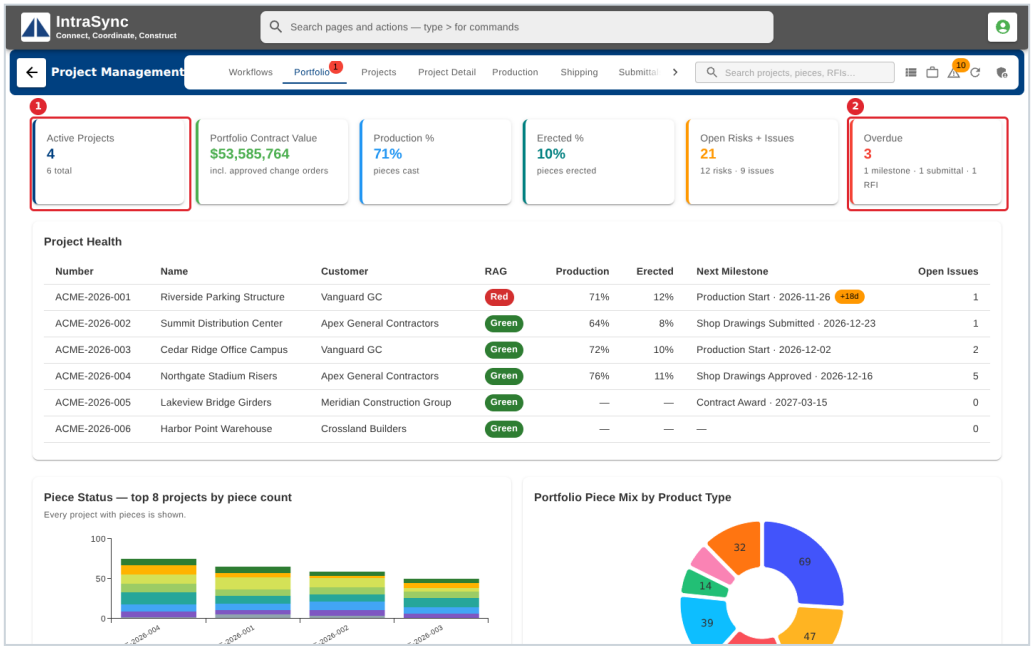
Step 3. Select a result. The hub scopes to its project and opens the tab that holds it.

Tips:

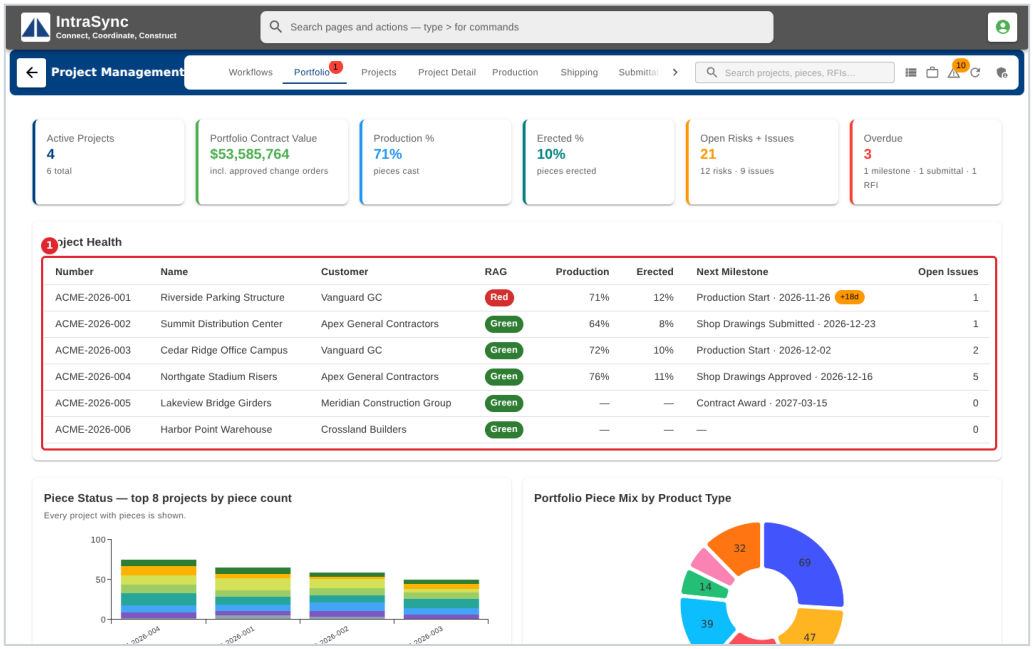
- Search looks at project numbers and names, piece marks and drawings, submittal and RFI numbers, and document names.
- When nothing matches, the results say so; check the spelling or try fewer characters.

4. Check the health of every project

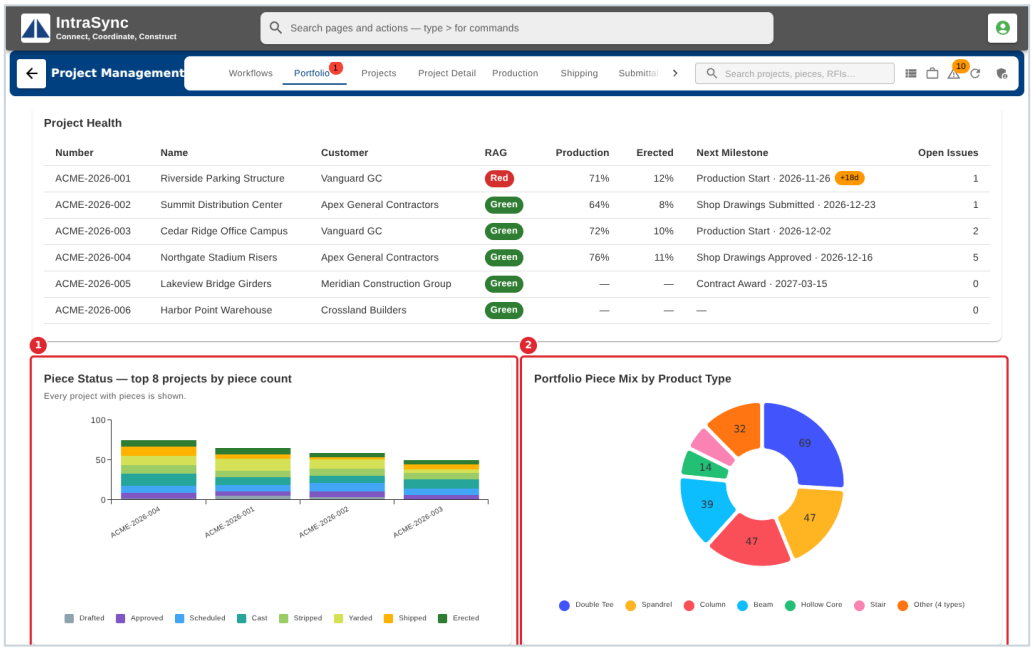
See at a glance which projects are on track and which are slipping, before you open any of them.



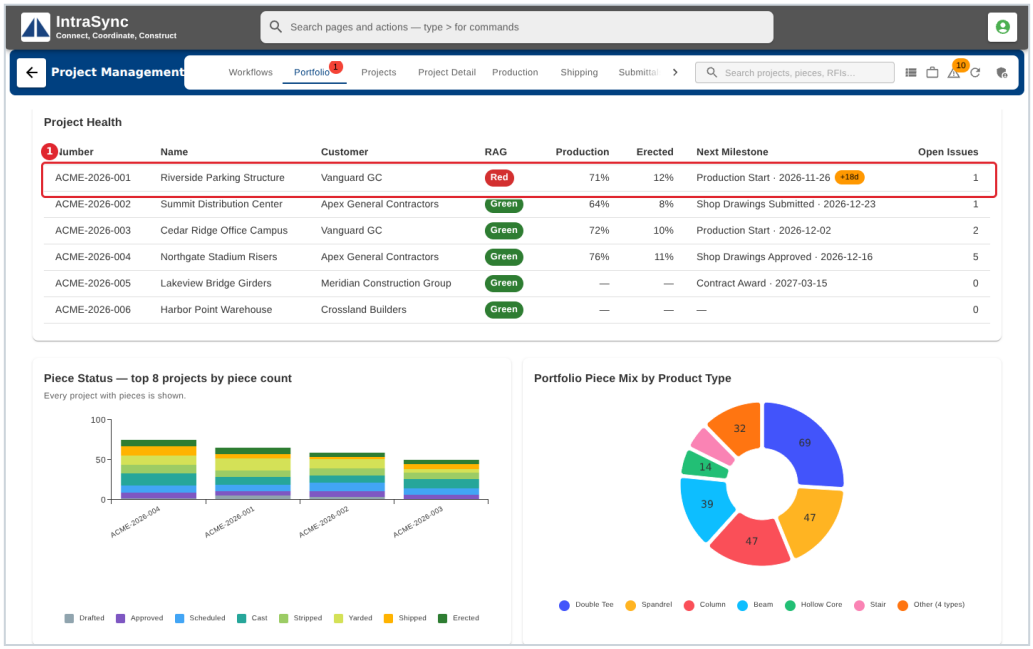
Step 1. Open the Portfolio tab. The cards across the top total every project: active projects, contract value, production and erection progress, open risks and issues, and overdue milestones.



Step 2. Read the Project Health table: one row per project, with its red, amber or green status, progress and next milestone.



Step 3. Scroll down for the piece status of the largest projects and the mix of product types across the portfolio.



Step 4. Select a row to open that project on the Project Detail tab.

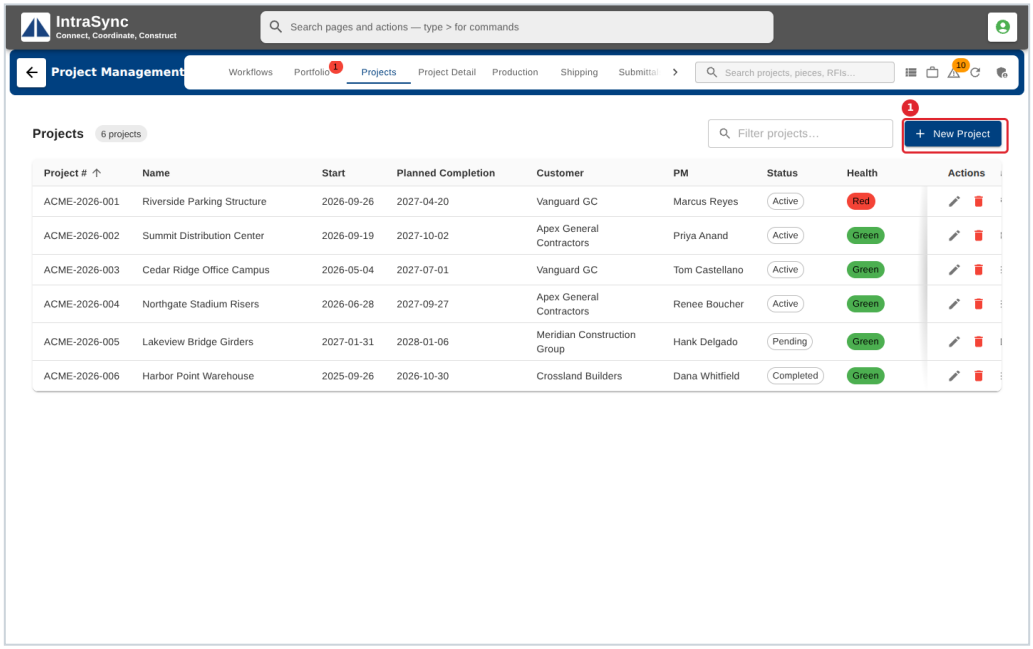
Tips:

- A project turns amber or red from its worst milestone slip, or from open critical issues. An administrator can see the exact thresholds under Module configuration.
- Production and erection percentages come from the pieces logged on the Production tab. A project with no pieces shows a dash.

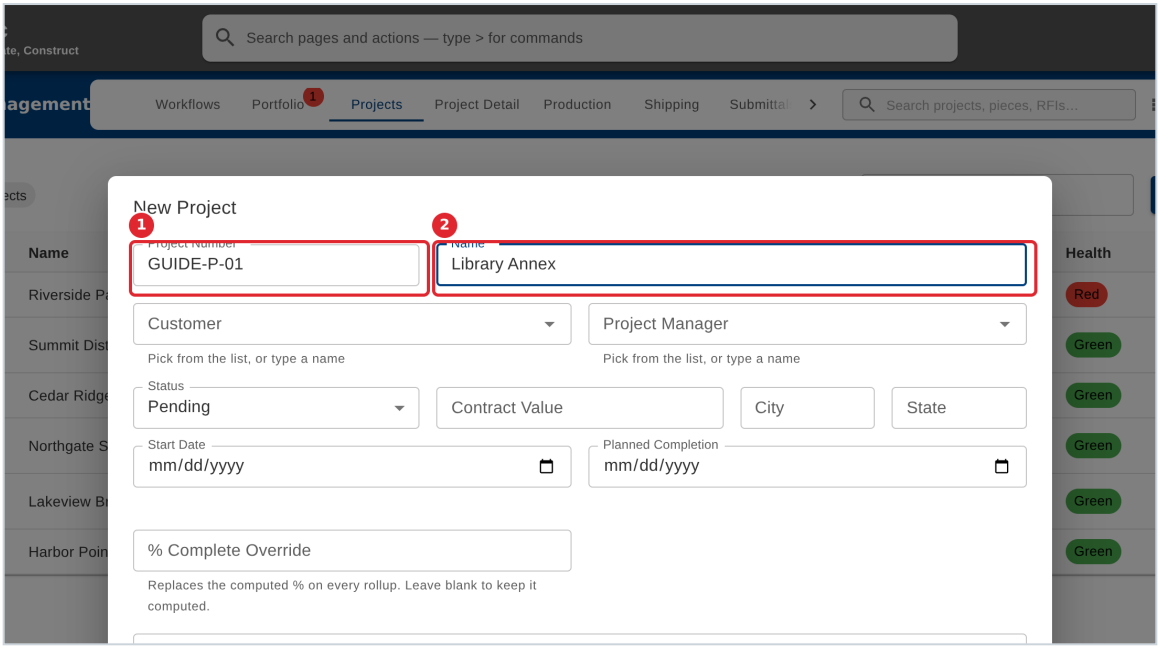
This is shown in the Project Management video at 0:08.

5. Create a project

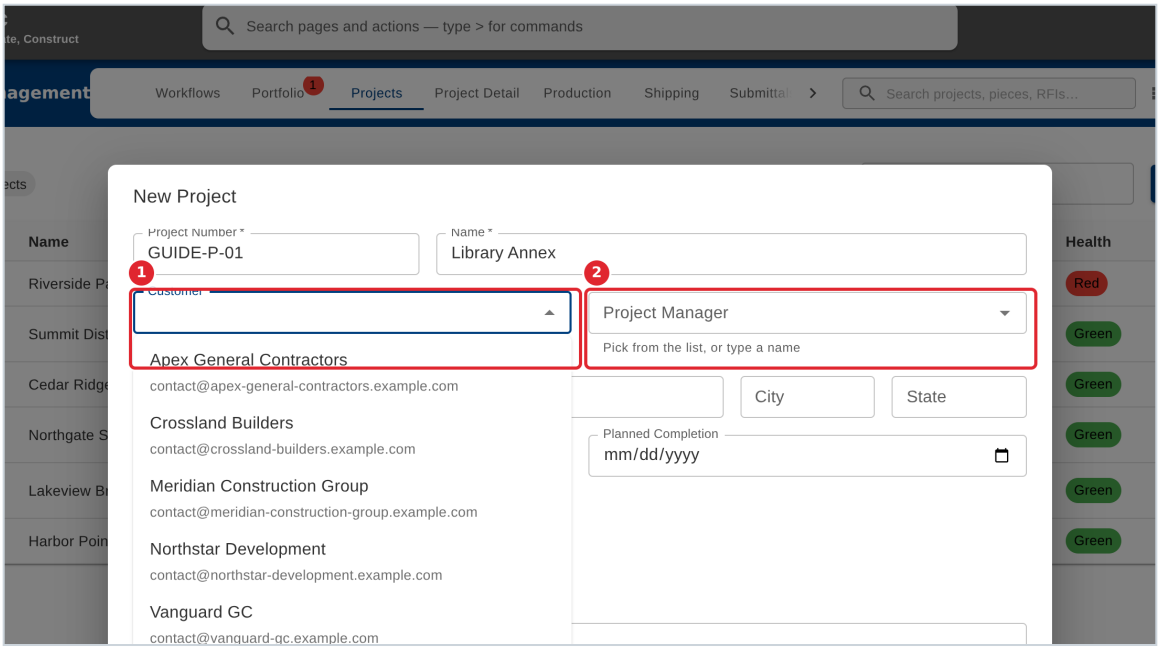
Add a new job to the register so its milestones, pieces, loads and coordination records have a home.



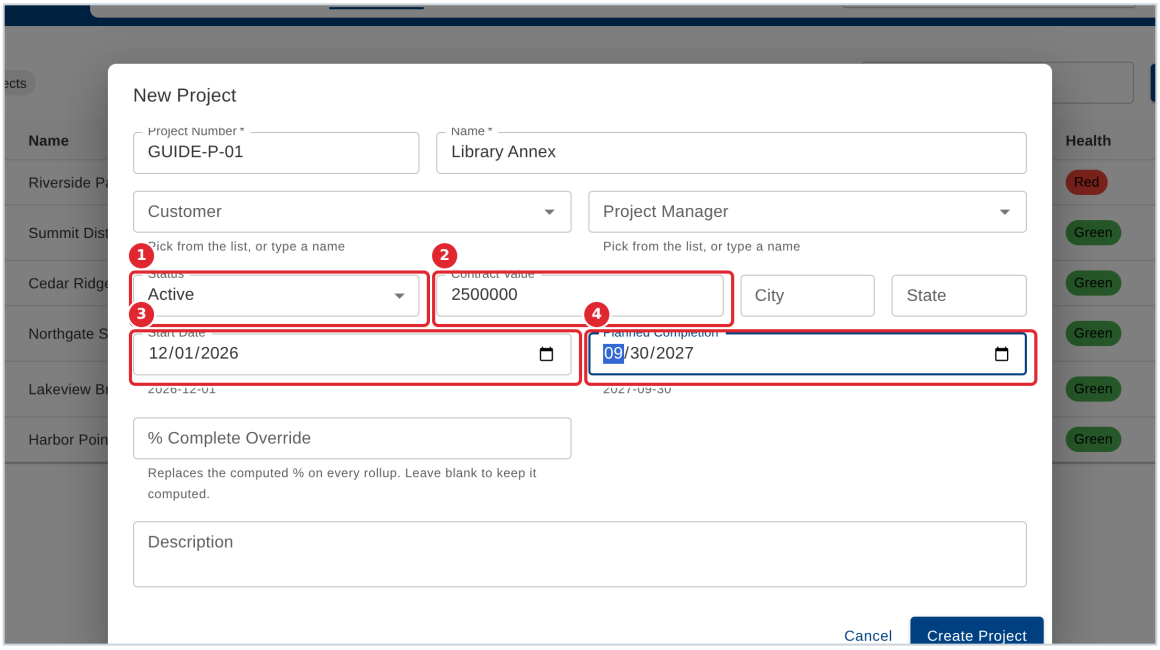
Step 1. Open the Projects tab and select New Project.



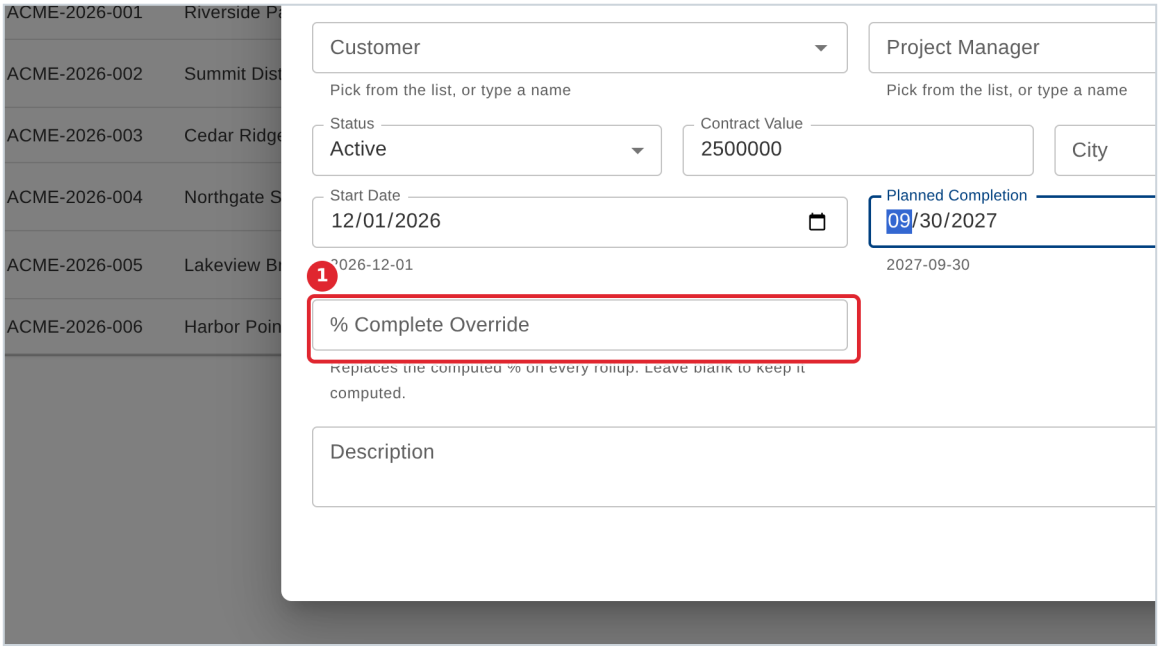
Step 2. Enter the Project Number and the Name. Both are required.



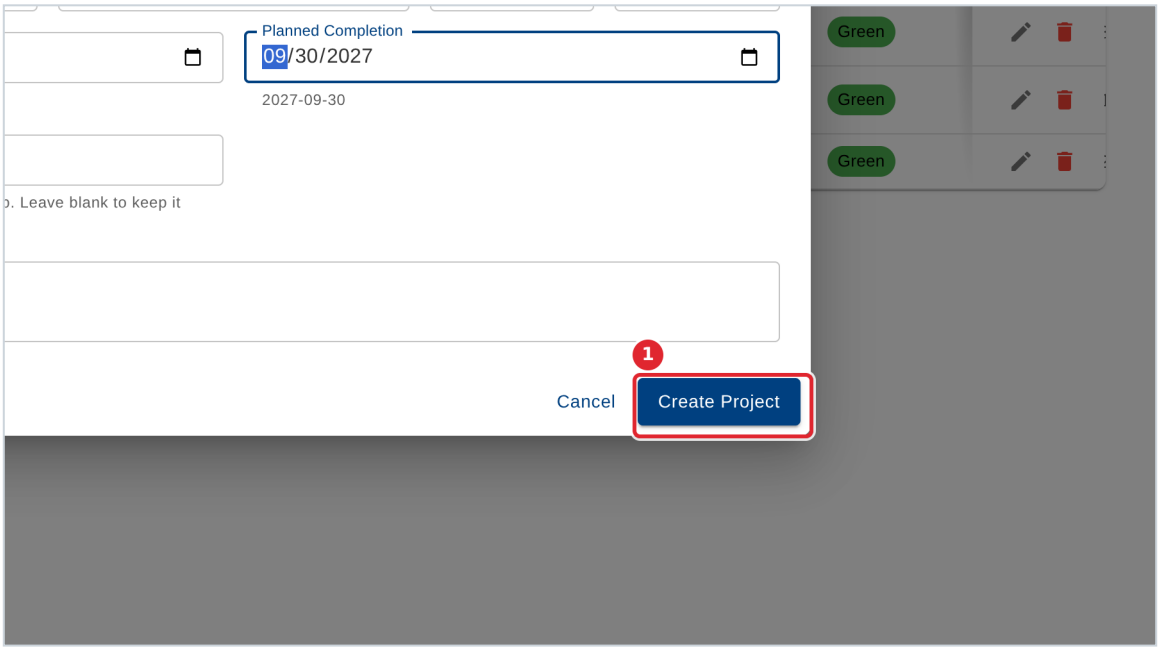
Step 3. Pick the Customer and the Project Manager from their lists, or type a name.



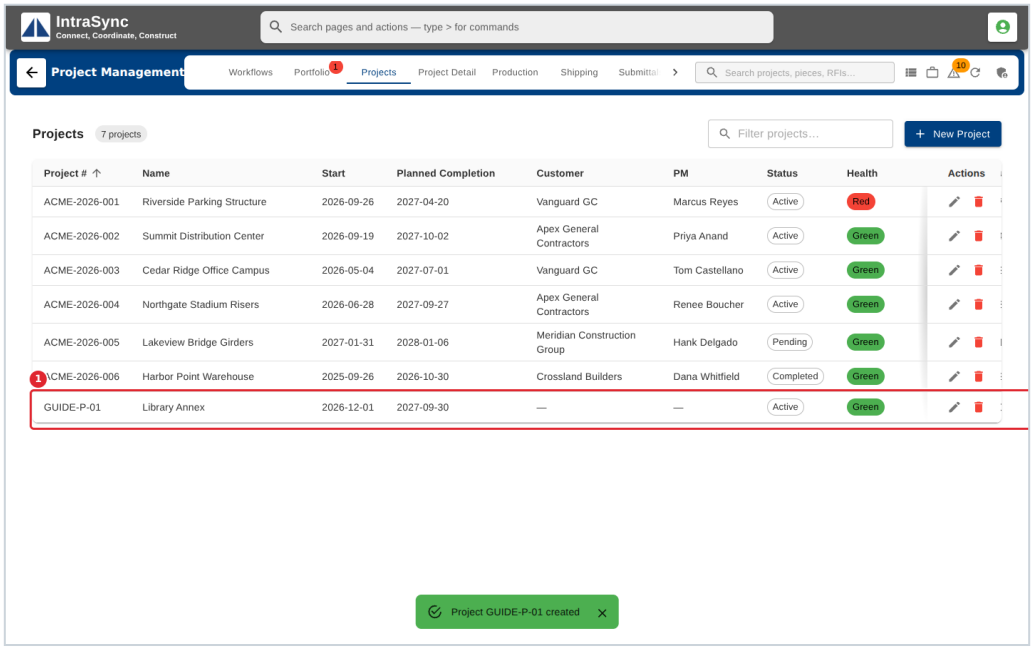
Step 4. Set the Status, the Contract Value, the location and the Start Date and Planned Completion.



Step 5. Leave % Complete Override blank to let the hub compute progress from the pieces. Enter a number only to replace it.



Step 6. Select Create Project.



Step 7. The project joins the register.

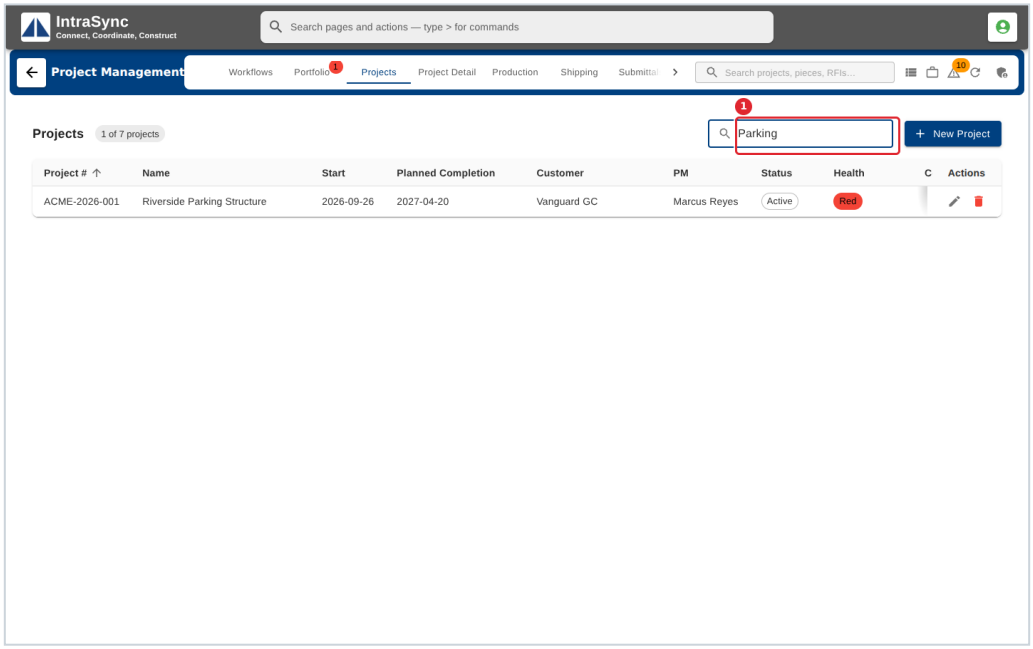
Tips:

- Project Number and Name are required; Create Project stays unavailable until both are filled in.
- % Complete Override accepts a number from 0 to 100. Leave it blank to keep the computed percentage.
- If you close the form with unsaved changes, the hub asks before discarding them.

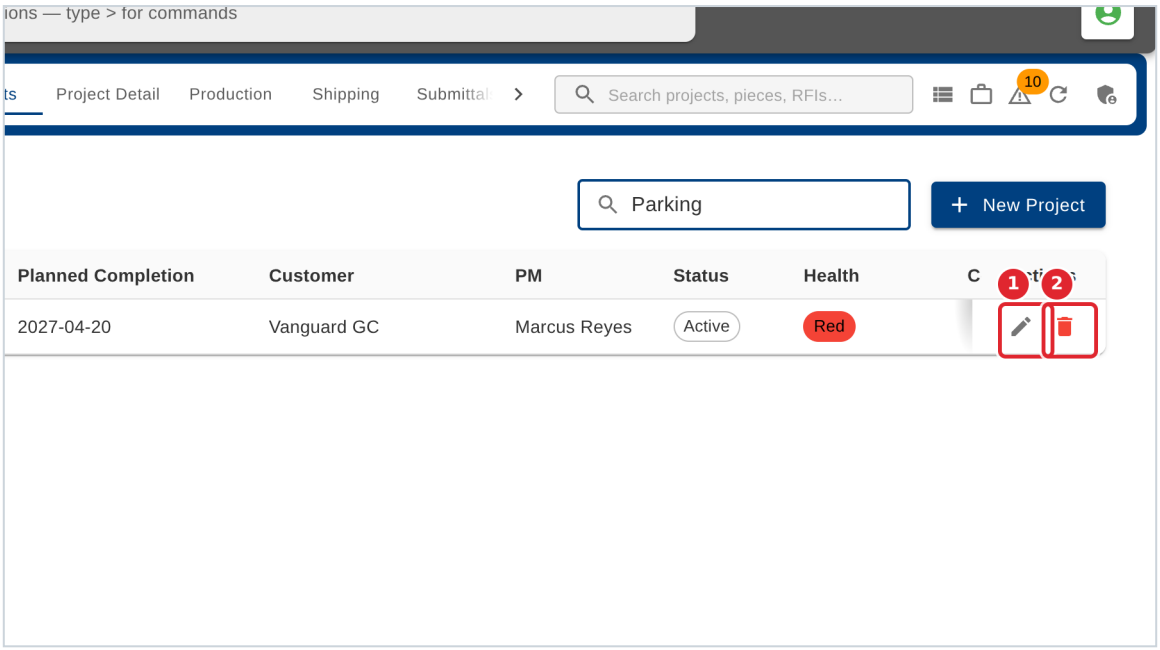
This is shown in the Project Management video at 0:21.

6. Find, edit or delete a project

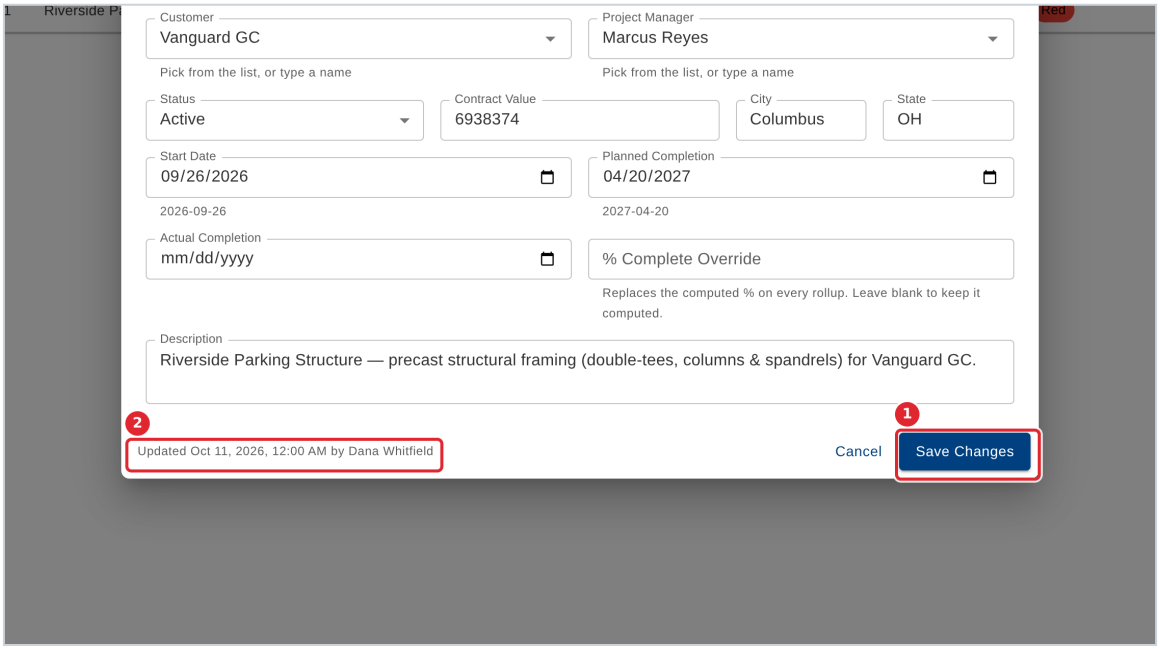
Keep the register accurate as a job's customer, dates, value or status change.



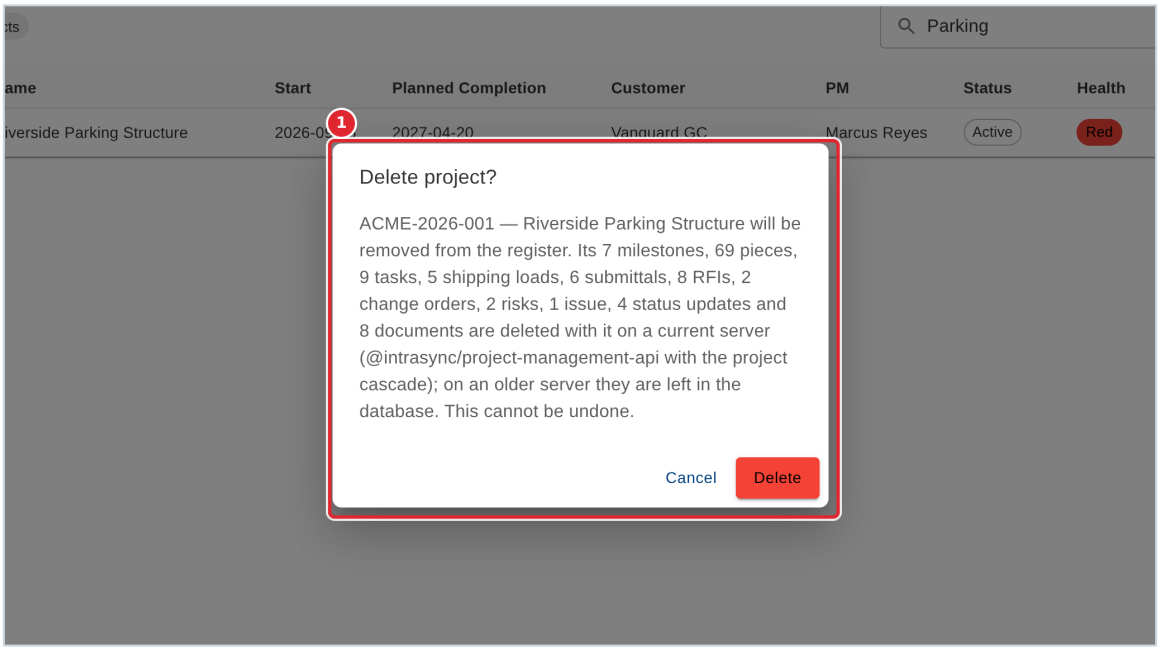
Step 1. On the Projects tab, type in Filter projects to narrow the register by number, name or customer.



Step 2. Use the pencil to edit a project, or the bin to delete it. Select the row itself to open its detail.



Step 3. Change what you need and select Save Changes. The footer shows who last changed the project, and when.



Step 4. Deleting asks you to confirm and names what else belongs to the project. It cannot be undone.

Tips:

- Selecting a row (not its buttons) opens the project on the Project Detail tab.
- Deleting a project cannot be undone. Check the confirmation, which lists the records that belong to it.

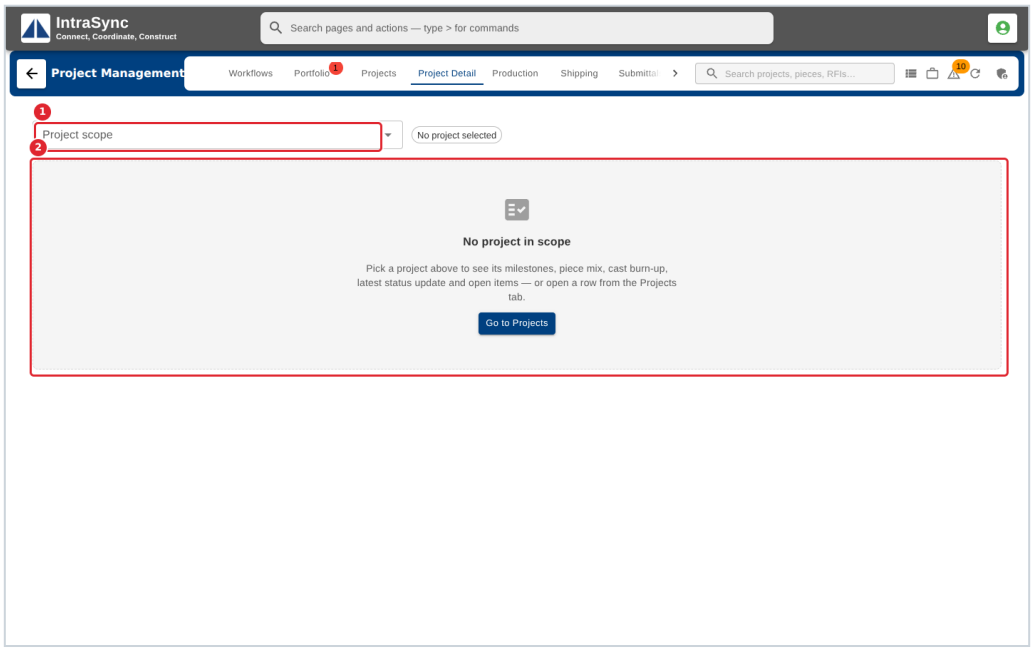
This is shown in the Project Management video at 0:17.

7. Read a project's detail

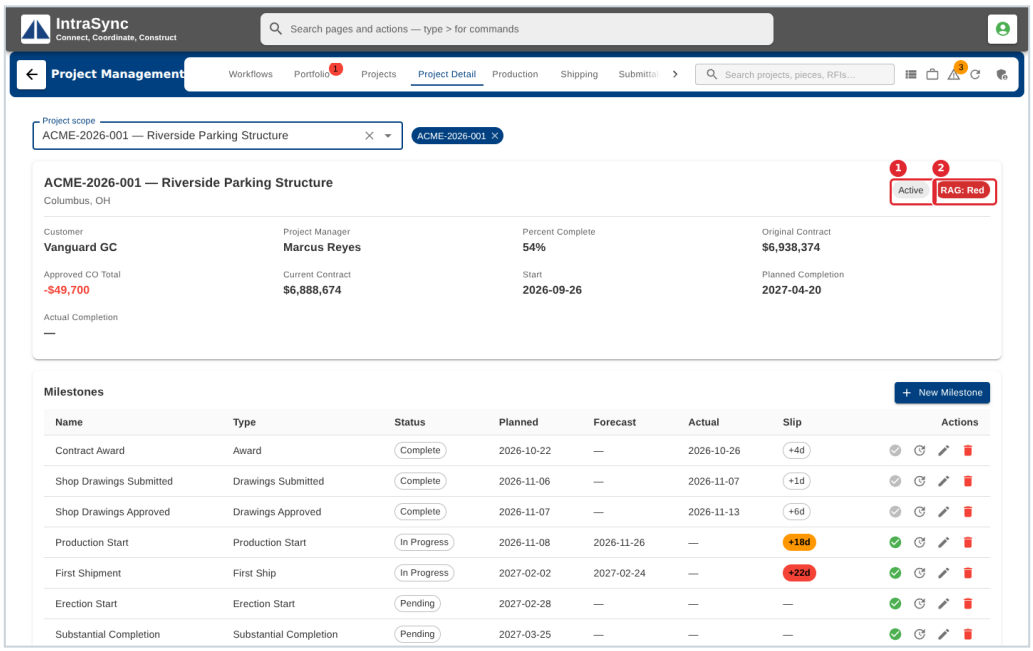
See one project's contract, health, milestones, production progress, latest status and open items on one page.

Before you start:

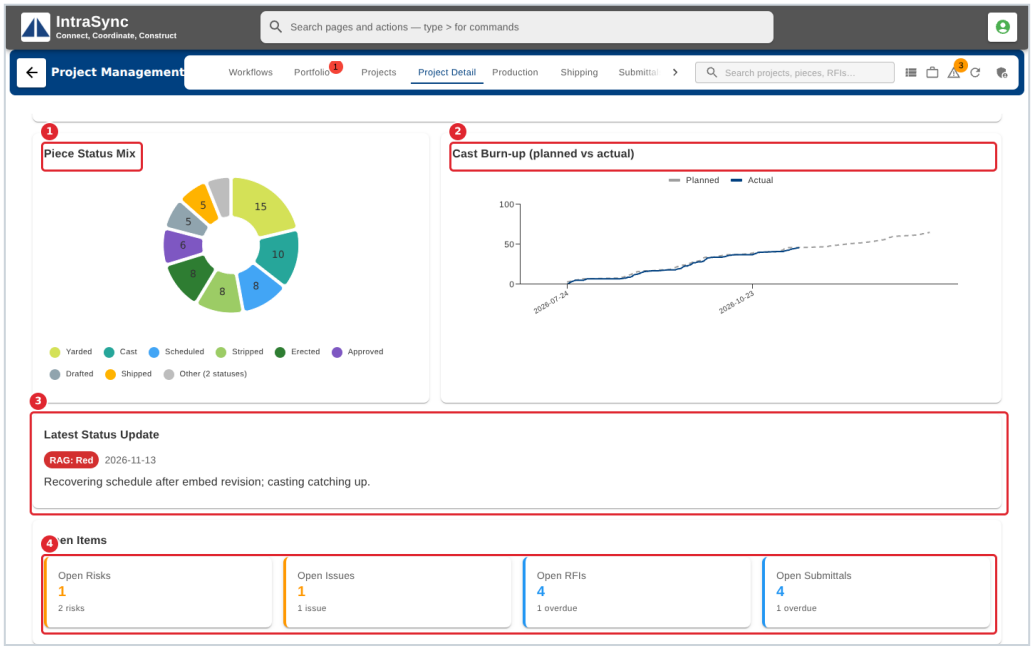
– Choose the project in the Project scope field, or select its row on the Projects or Portfolio tab.



Step 1. Open the Project Detail tab. With no project in scope it asks you to pick one.



Step 2. Choose the project. The header shows its status, its red, amber or green health, and the contract figures, including approved change orders.



Step 3. Further down: the piece status mix, the cast burn-up against plan, the latest status update and the open items.

Tips:

- Current Contract is the original contract plus approved change orders.
- The charts fill in once pieces are logged on the Production tab, and the latest status appears once a status update is posted.

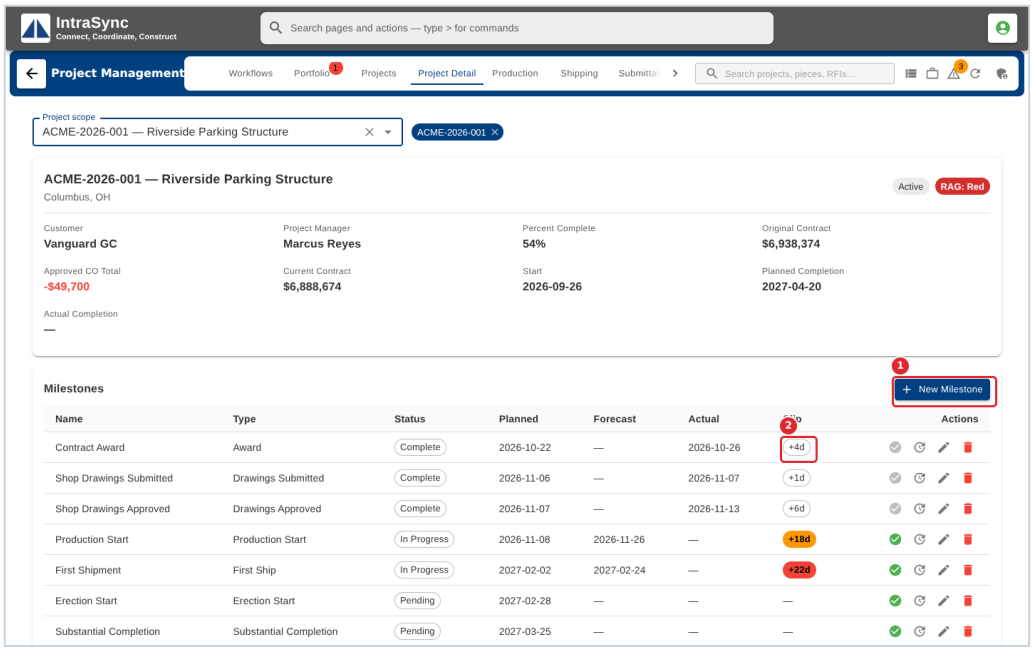
This is shown in the Project Management video at 0:35.

8. Add, complete and reforecast milestones

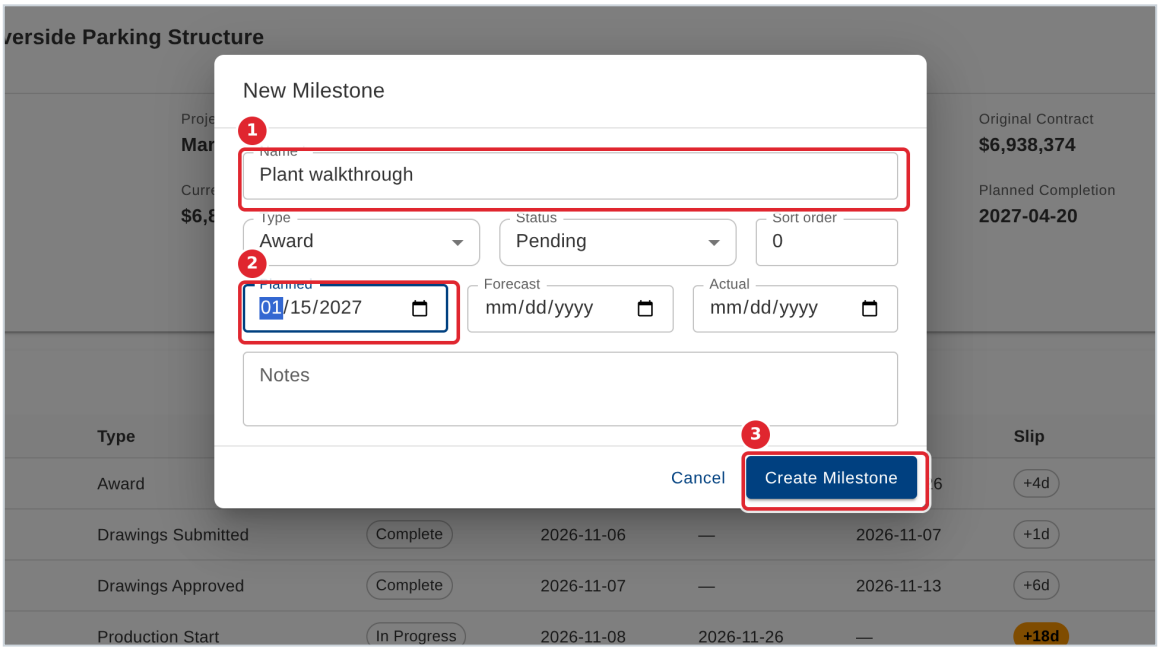
Milestones drive the project's red, amber or green health, its slip badges and the portfolio's overdue count.

Before you start:

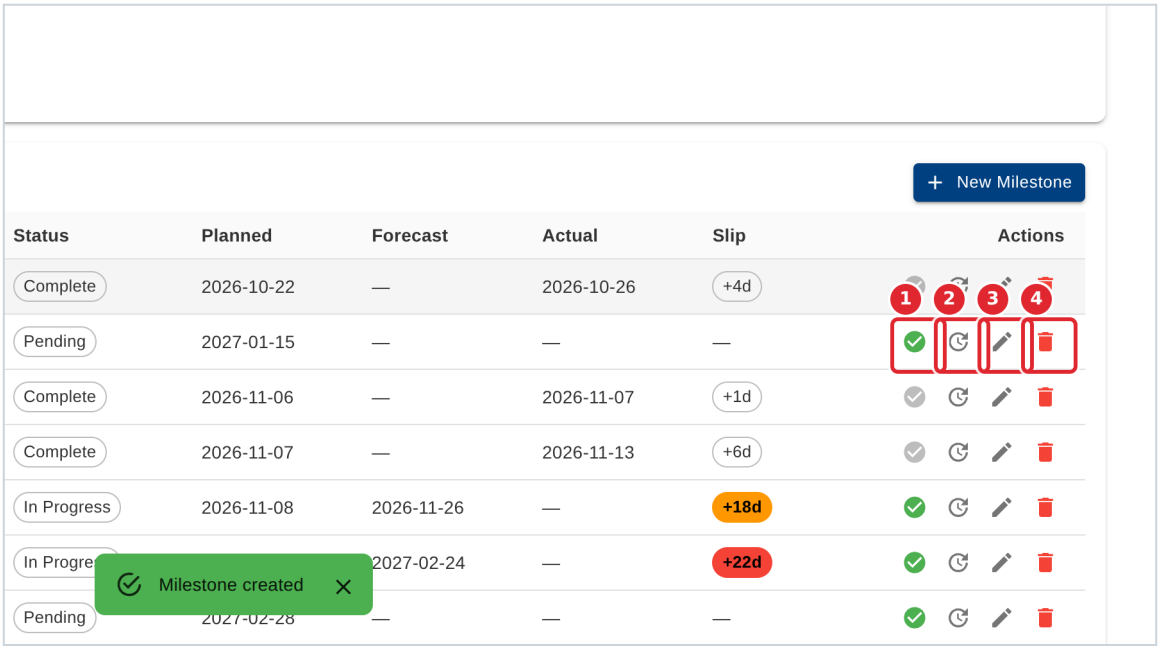
– A project is in scope on the Project Detail tab.



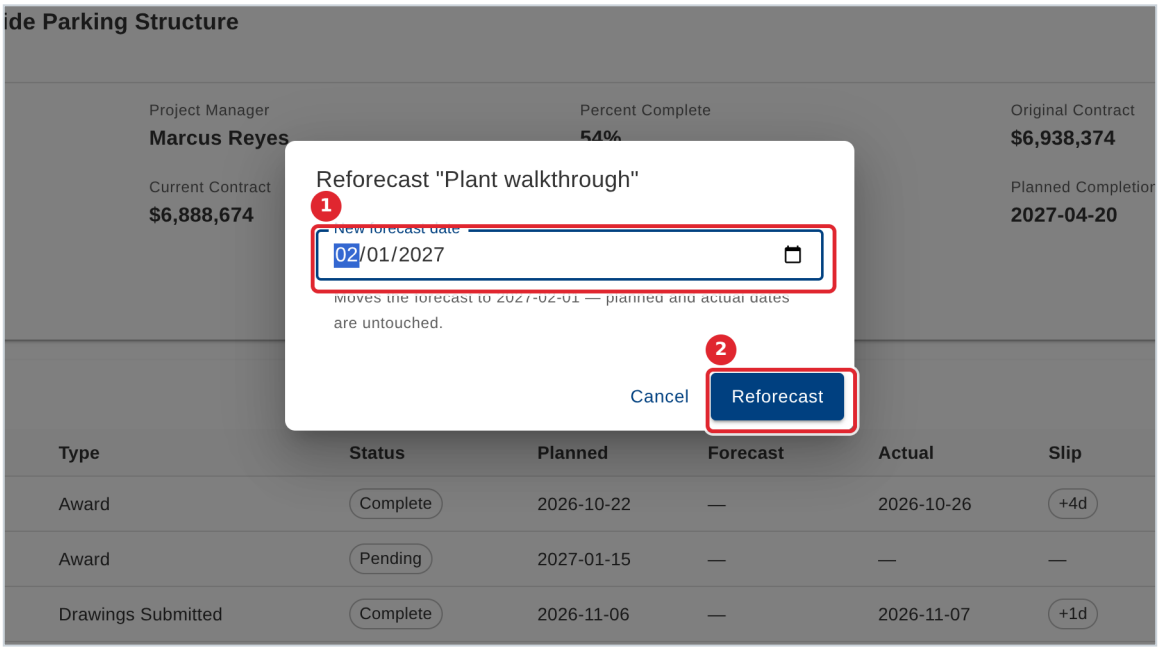
Step 1. On Project Detail, find the Milestones card. The Slip column shows how many days each milestone runs behind plan.



Step 2. Select New Milestone. Enter the Name (required), the Type, the Status and the Planned date, then select Create Milestone.



Step 3. On each row: mark the milestone complete (it records today as the actual date), reforecast it, edit it or delete it.



Step 4. To reforecast, enter the New forecast date and select Reforecast. The planned and actual dates stay as they were.

Tips:

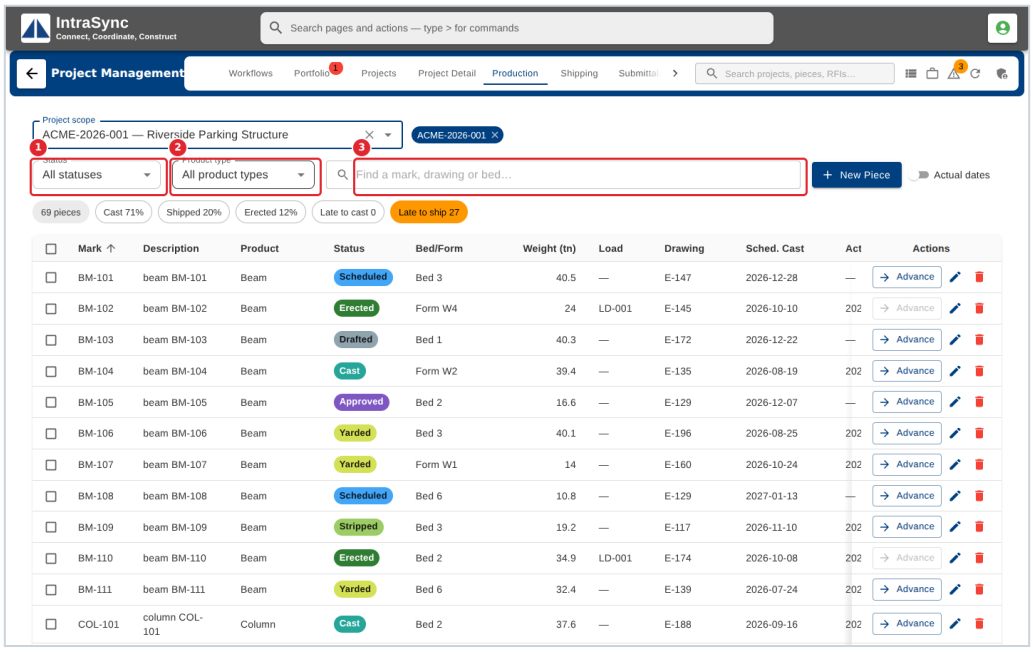
- The Name is required; the save button stays unavailable until it is filled in.
- A slip badge turns amber, then red, as a milestone falls further behind plan. Hover the badge to see the thresholds your company uses.
- Mark complete sets the status to Complete and today's date as the actual date.

9. Track pieces through production

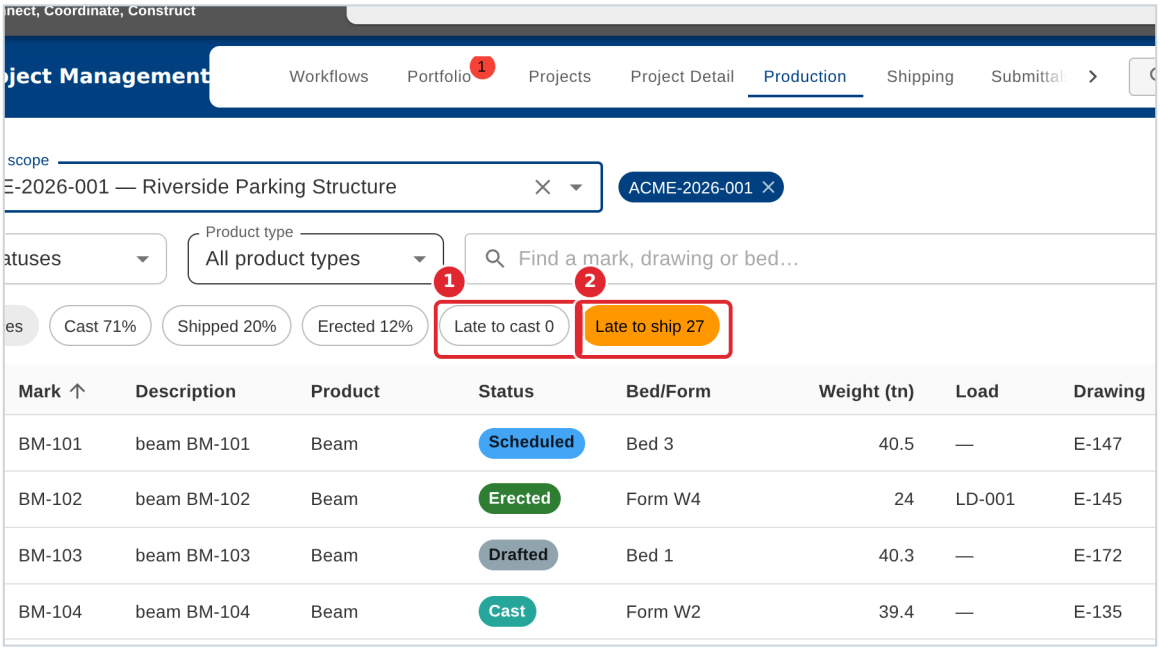
Follow every piece from drafting through casting, yarding and shipping to erection, and spot the late ones.

Before you start:

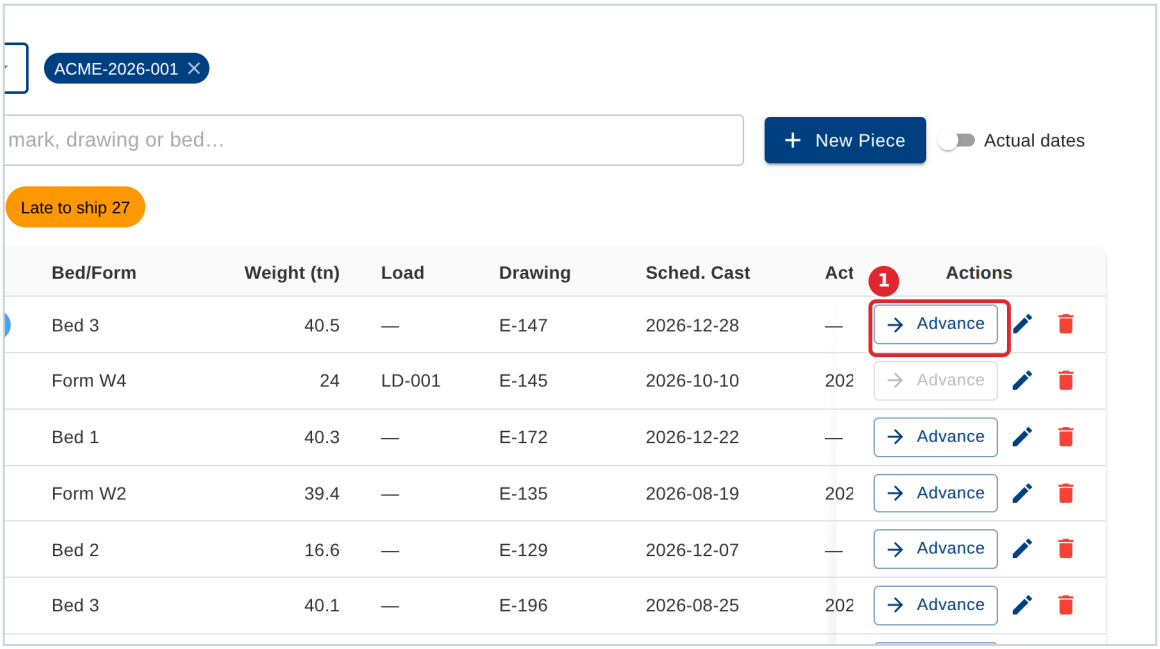
– A project is in scope to add pieces. The list itself works across all projects.



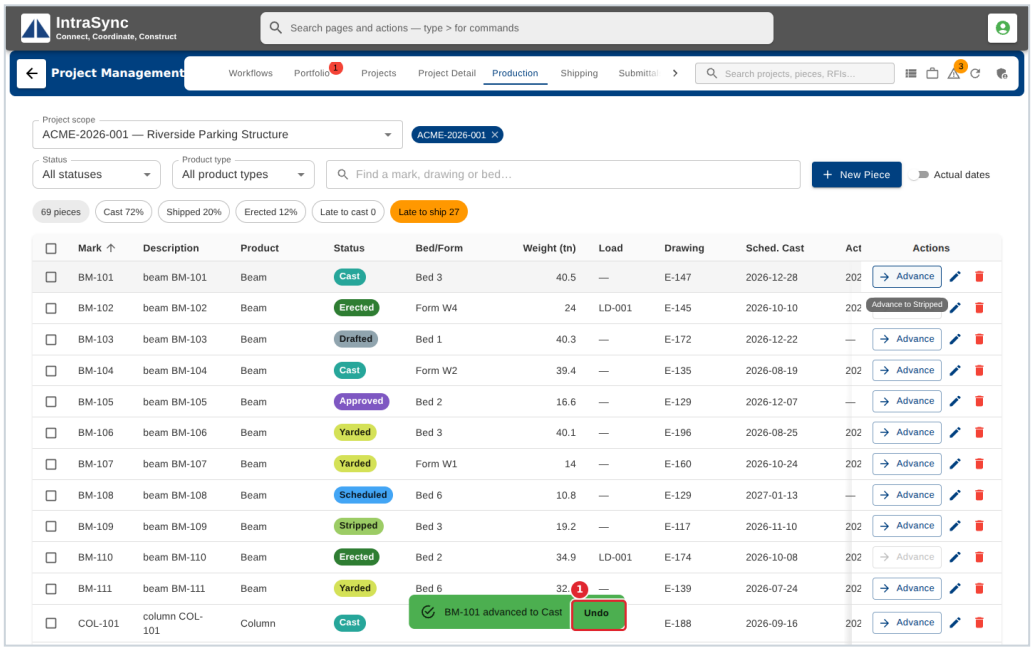
Step 1. Open the Production tab with a project in scope. Filter the pieces by Status or Product type, or find a mark, drawing or bed.



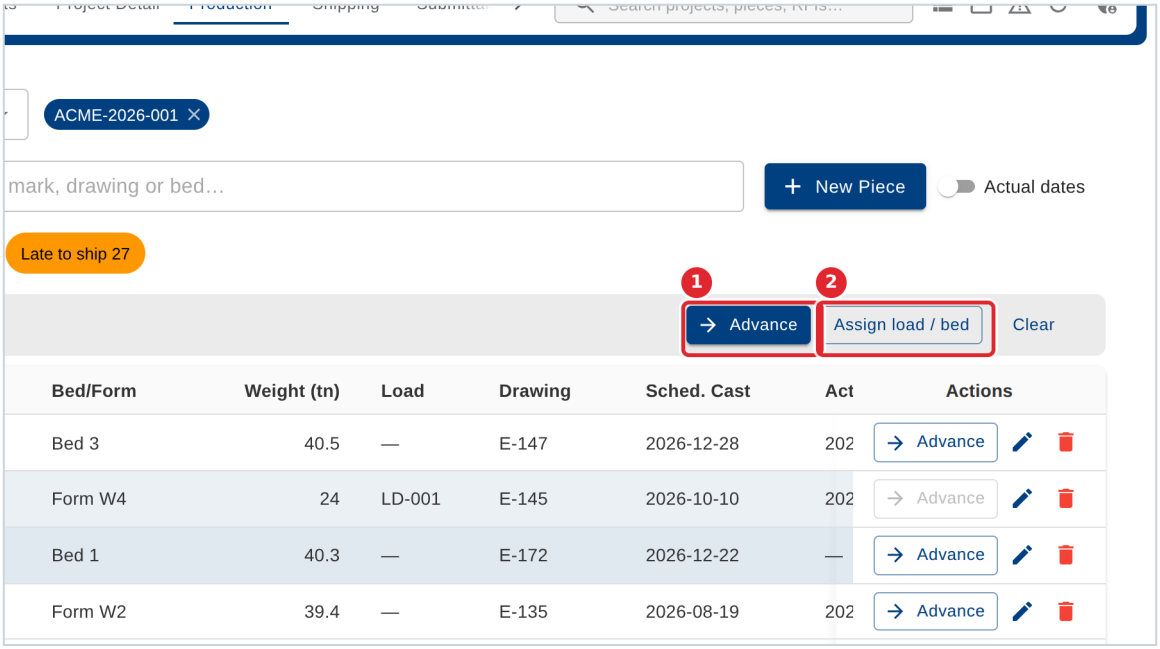
Step 2. The chips show the share cast, shipped and erected. Select Late to cast or Late to ship to see only the pieces running late.



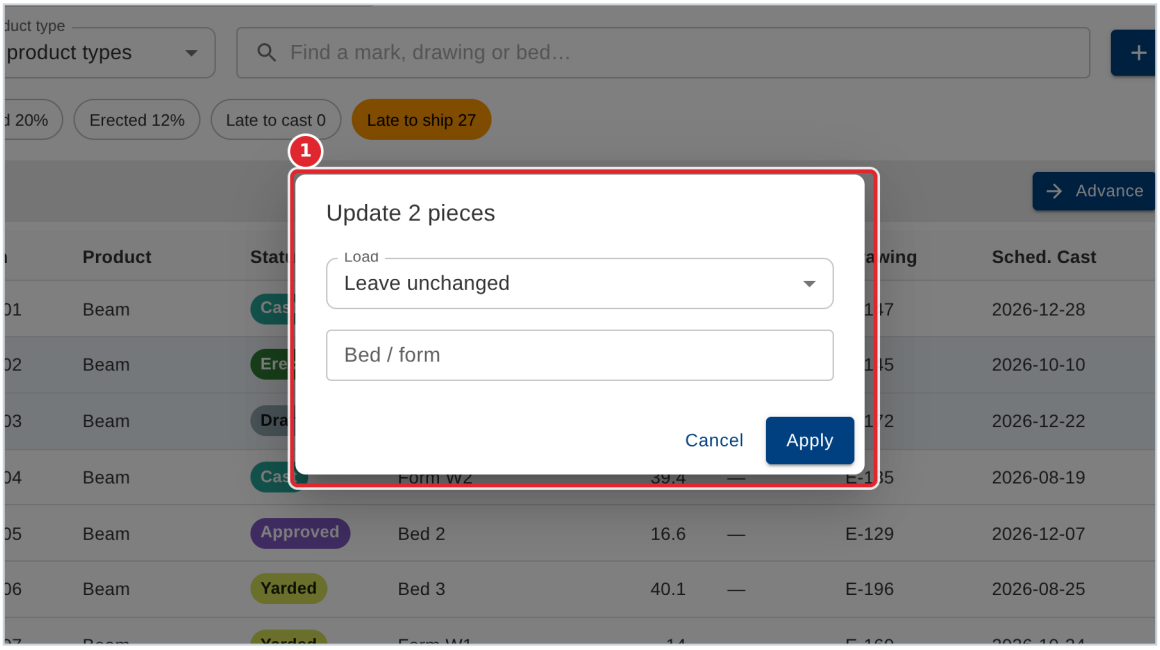
Step 3. Select Advance on a row to move the piece to its next stage. Moving to cast, shipped or erected records today's date, and the message offers Undo.



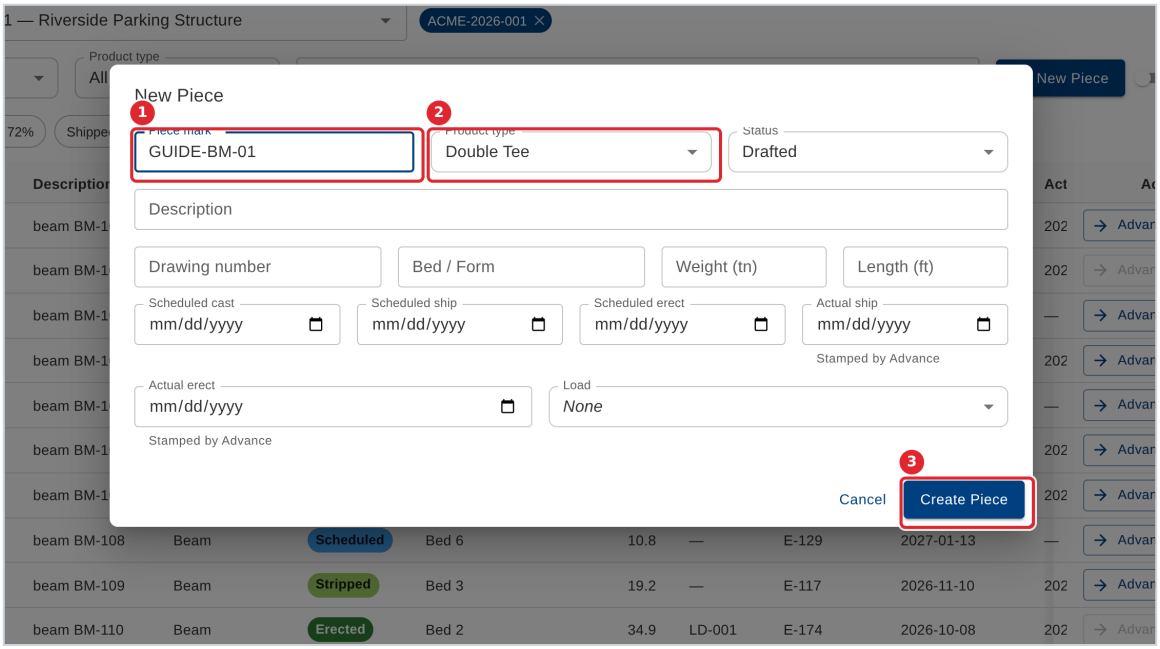
Step 4. Select Undo in the message if you advanced the wrong piece.



Step 5. Tick several pieces to work on them together: Advance them all, or Assign load / bed.



Step 6. In the update dialog, choose a Load or type a Bed / form, then select Apply. Leave a field as it is to keep each piece's own value.



Step 7. To add a piece, select New Piece. Enter the Piece mark (required), its product type, status, drawing, bed, size and scheduled dates, then select Create Piece.

Tips:

- A piece on hold or rejected cannot be advanced.
- The Actual dates switch adds the recorded actual dates to the table, beside the scheduled ones.
- The piece mark is required on a new piece.

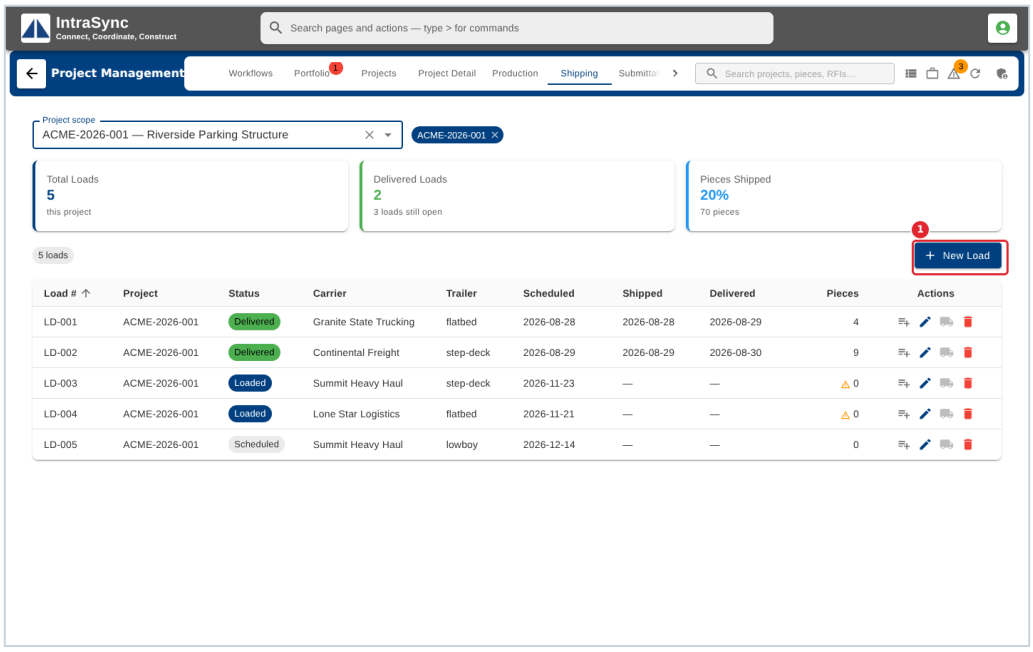
This is shown in the Project Management video at 0:45.

10. Plan a shipping load and mark it delivered

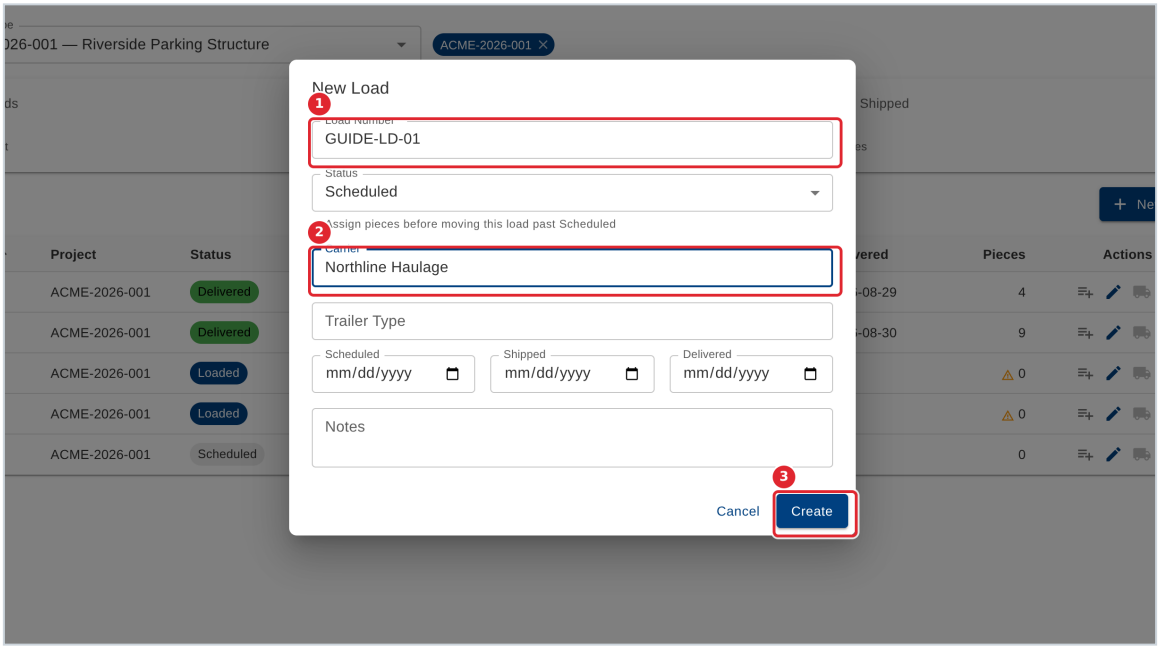
Group pieces onto loads, track each load to the job site, and keep shipped and delivered counts right.

Before you start:

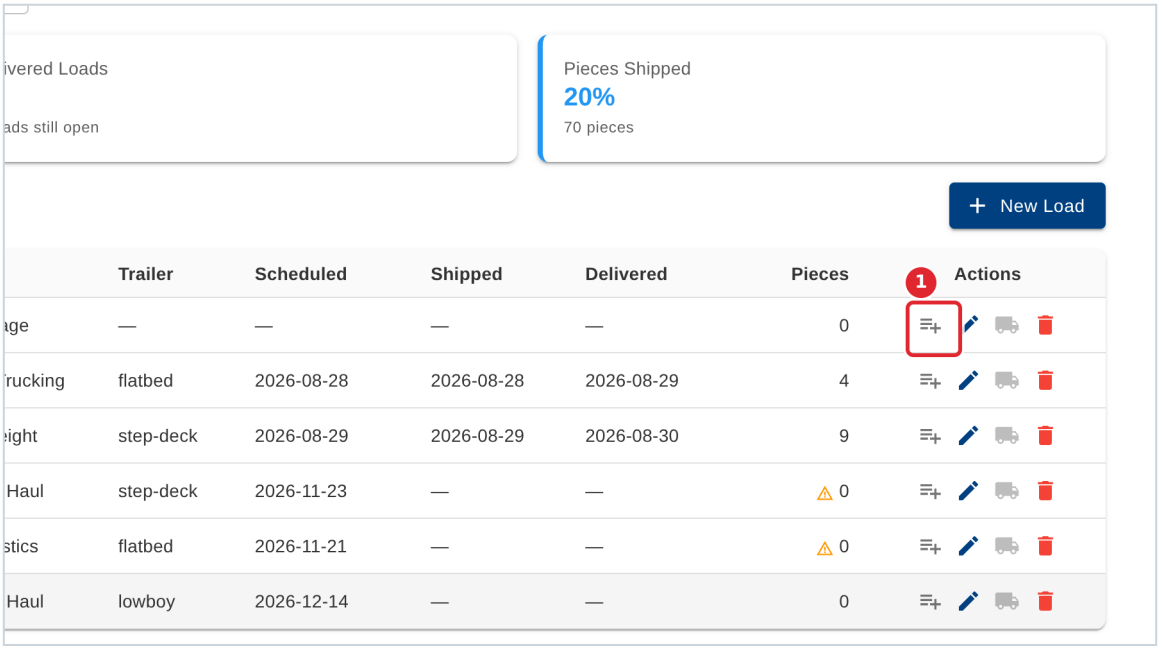
– A project is in scope, and its pieces are on the Production tab.



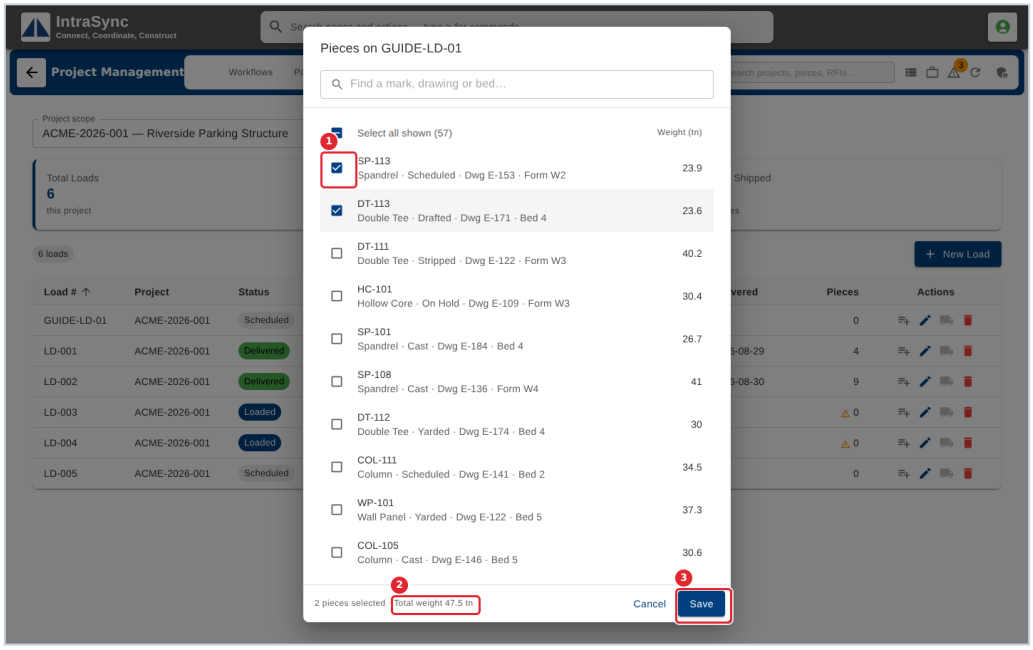
Step 1. Open the Shipping tab with a project in scope and select New Load.



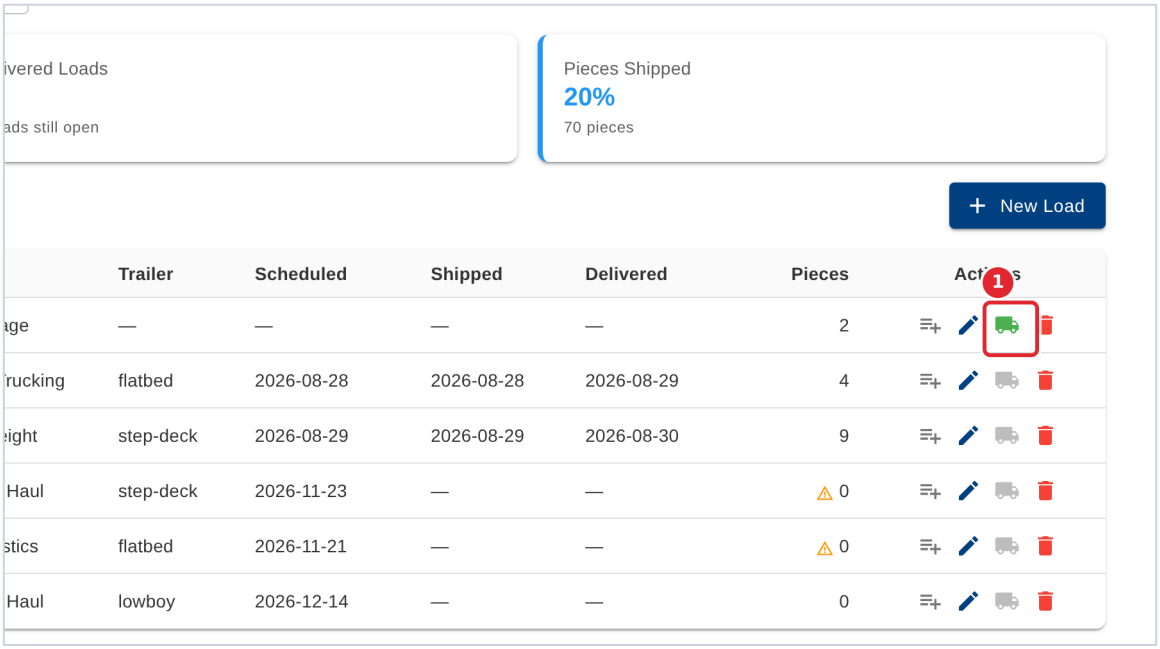
Step 2. Enter the Load Number (required), the Carrier, the Trailer Type and the Scheduled date, then select Create. A new load starts as Scheduled.



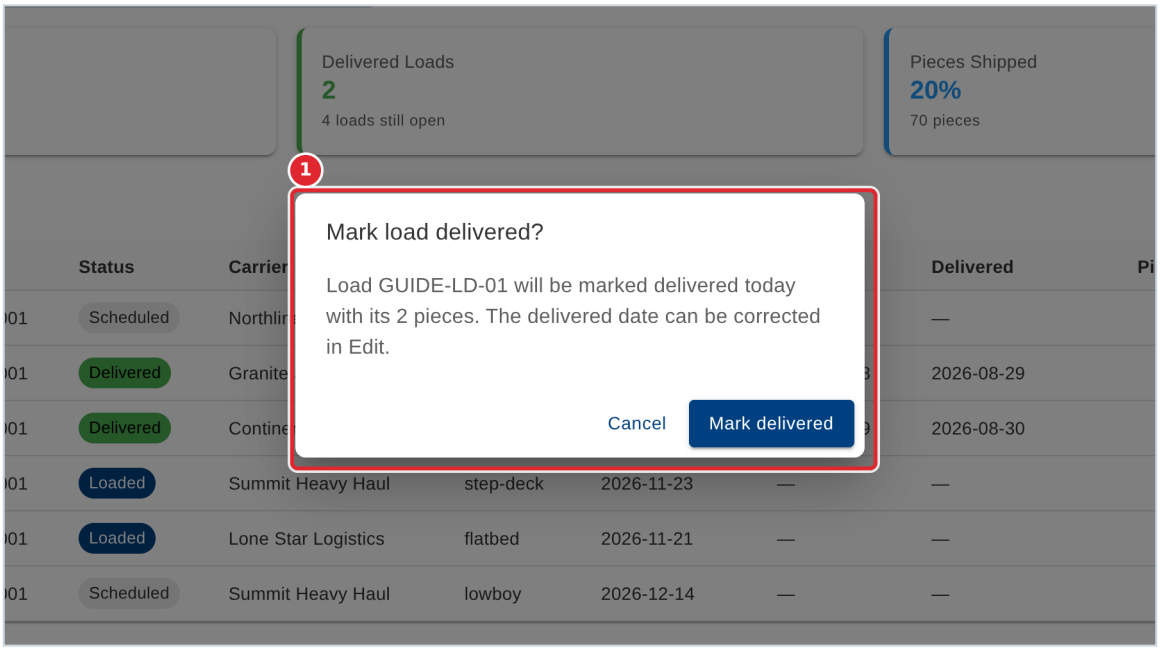
Step 3. On the new load's row, select Assign pieces to this load.



Step 4. Tick the pieces going on the load, filtering the list if it is long. The total weight of the ticked pieces shows at the bottom. Select Save.



Step 5. When the load arrives, select Mark delivered (the truck) on its row and confirm. A load with no pieces on it cannot be marked delivered.



Step 6. Confirm to mark the load delivered.

Tips:

- A load with no pieces stays Scheduled until pieces are assigned, and cannot be marked delivered.
- A piece already on another load is not offered; free it from its current load first.

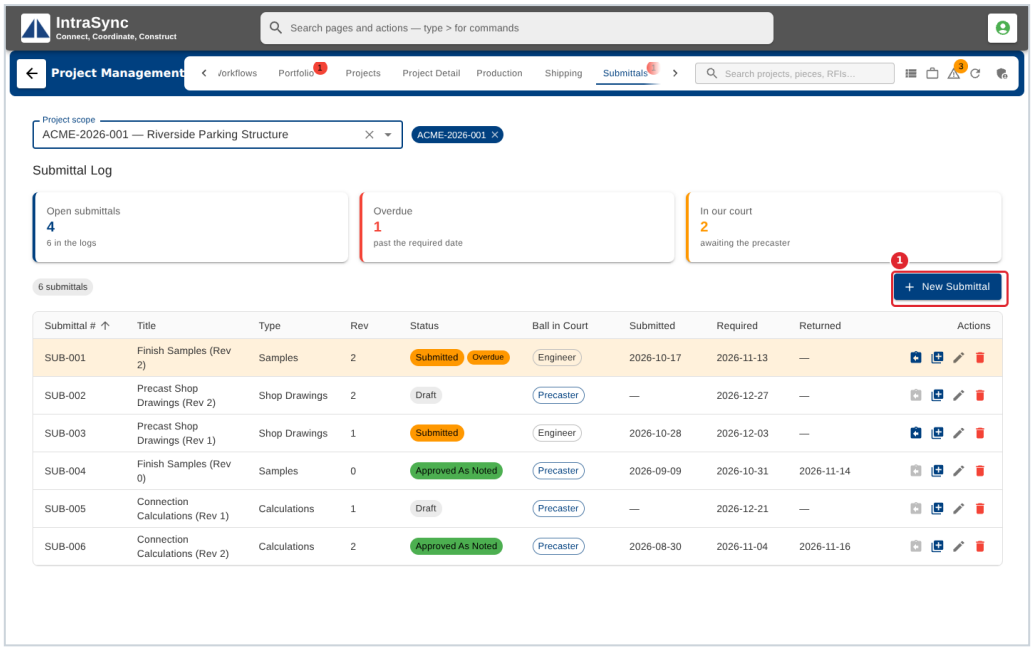
This is shown in the Project Management video at 0:52.

11. Log a submittal and record its return

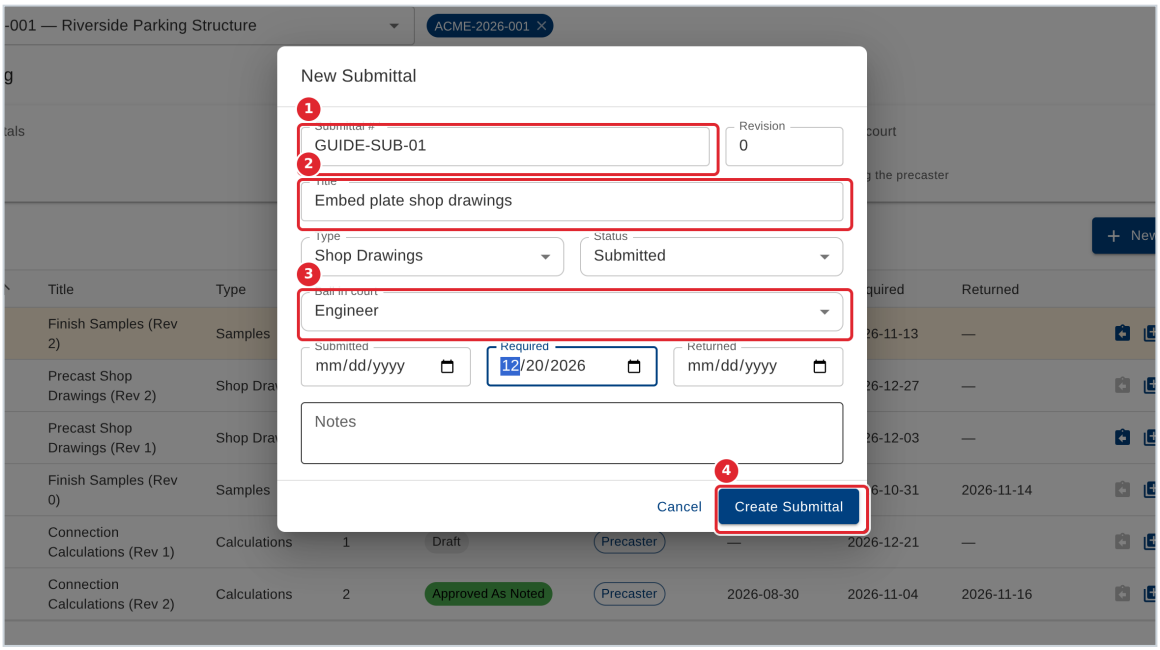
Keep a log of what has gone out for approval, who has it, and what came back.

Before you start:

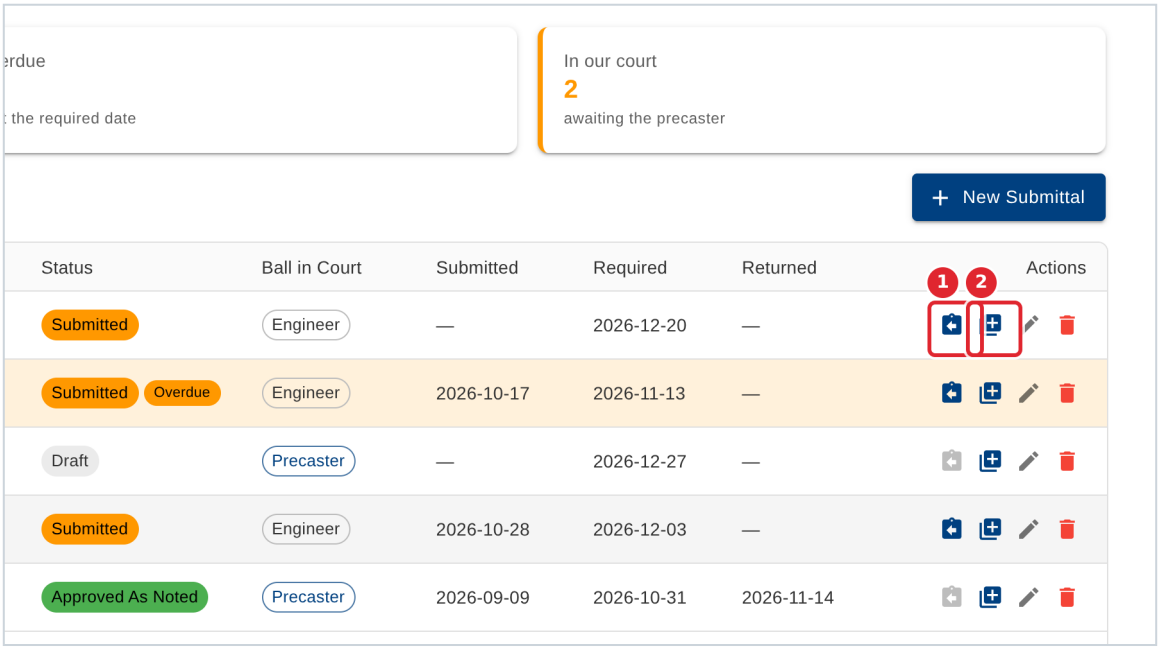
– A project is in scope, or choose the project in the form.



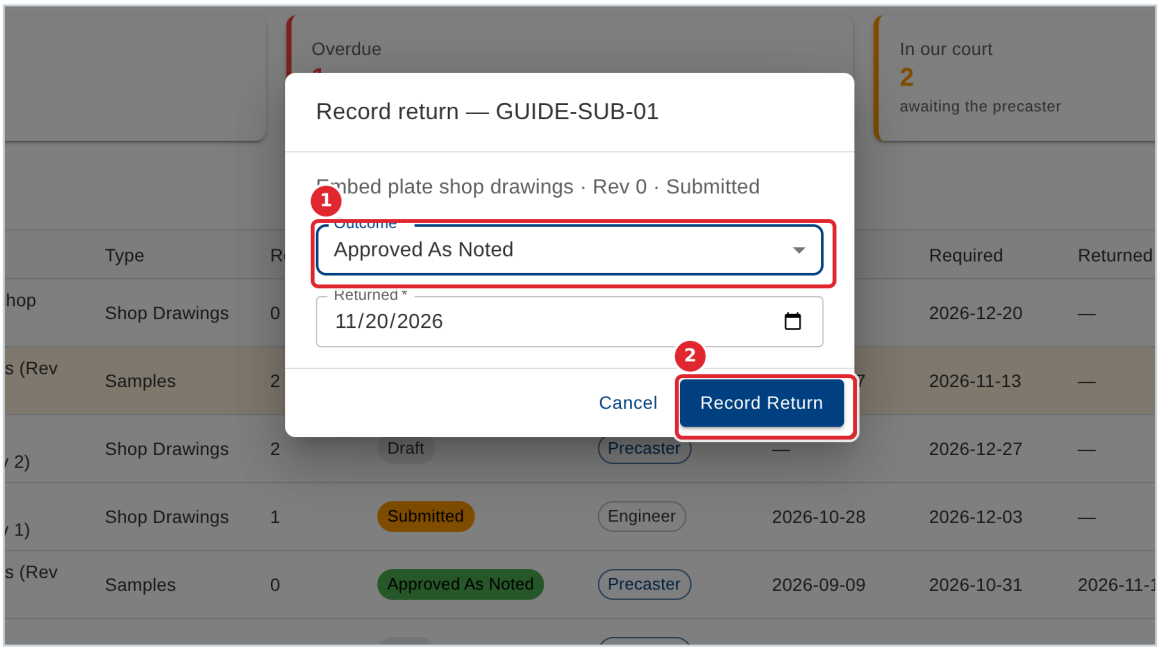
Step 1. Open the Submittals tab. The cards count open submittals, the overdue ones and the ones in your court. Select New Submittal.



Step 2. Enter the Submittal # and Title (both required), the Type and Status, who has the Ball in court, and the Required date. Select Create Submittal.



Step 3. When the reviewer sends it back, select Record the reviewer's return on its row. Use New revision to resubmit it as the next revision.



Step 4. Choose the Outcome, check the Returned date, and select Record Return.

Tips:

- Submittal #, Title and, when no project is in scope, Project are required.
- The outcome of a return can be Approved, Approved As Noted, Revise Resubmit or Rejected.
- A submittal past its Required date shows an Overdue chip and is counted in the Overdue card.

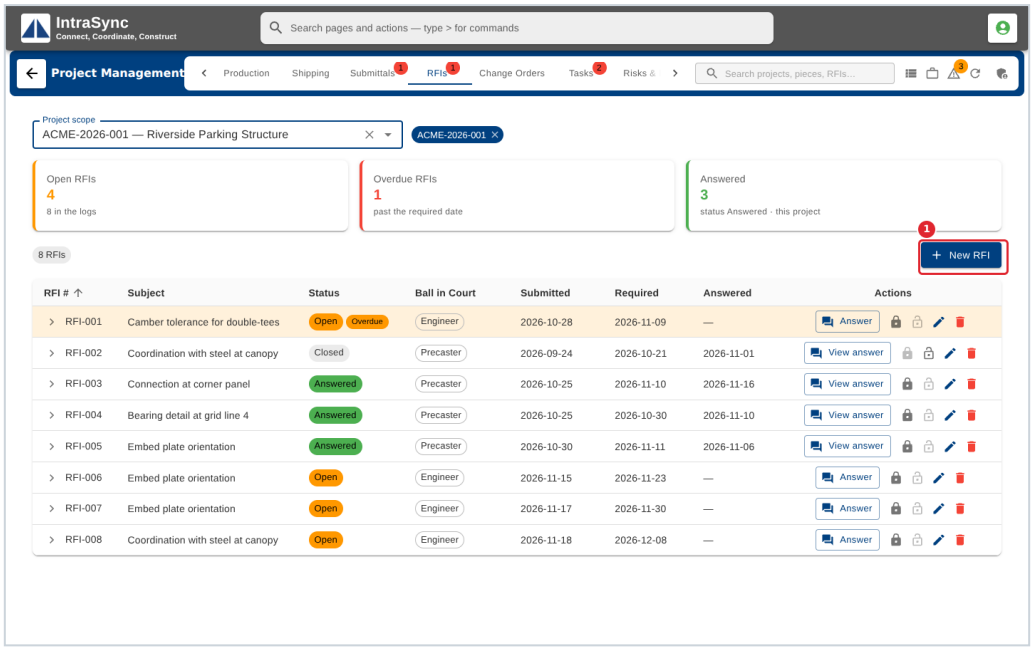
This is shown in the Project Management video at 0:55.

12. Raise an RFI and record its answer

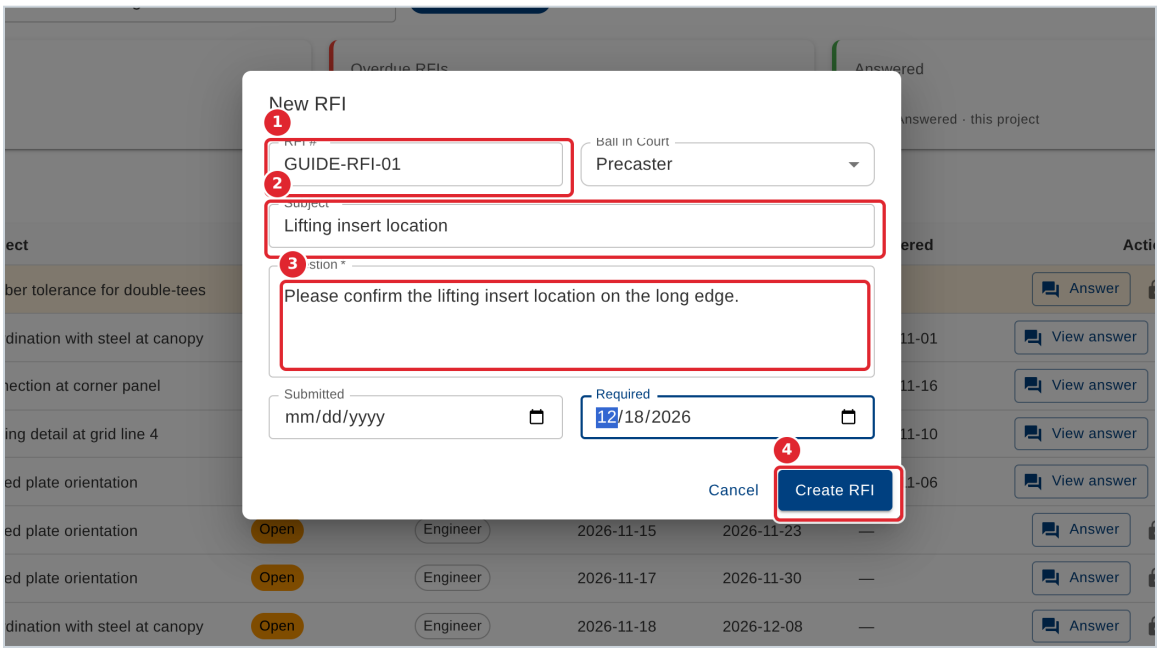
Track each request for information from question to answer, and see who owes the next move.

Before you start:

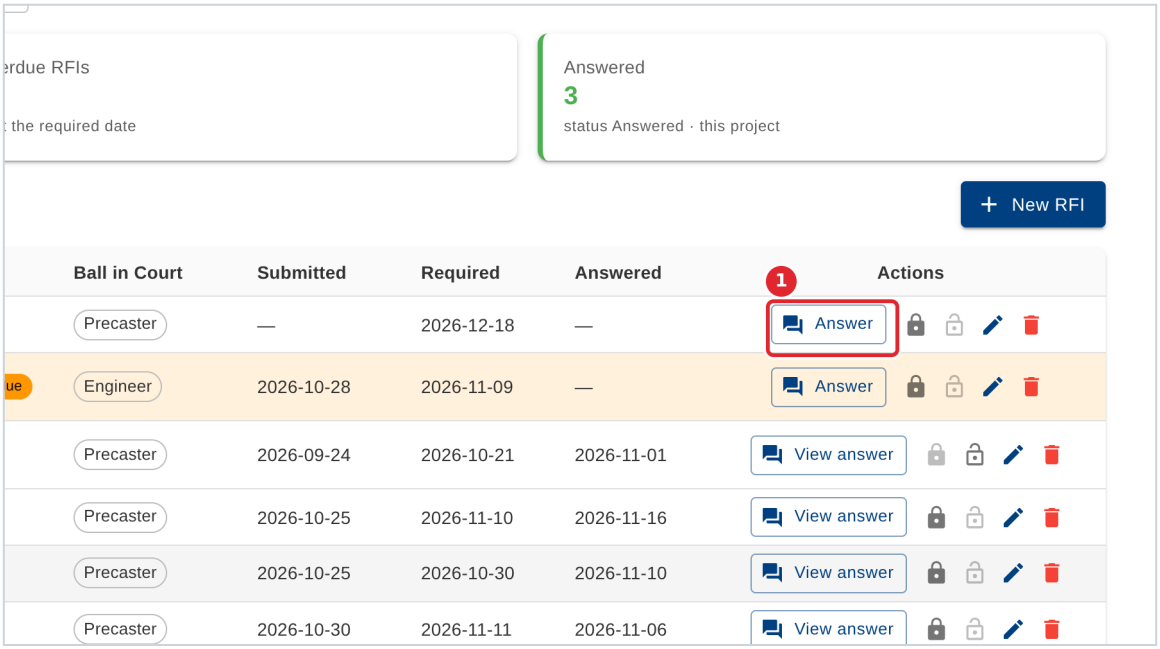
– A project is in scope, or choose the project in the form.



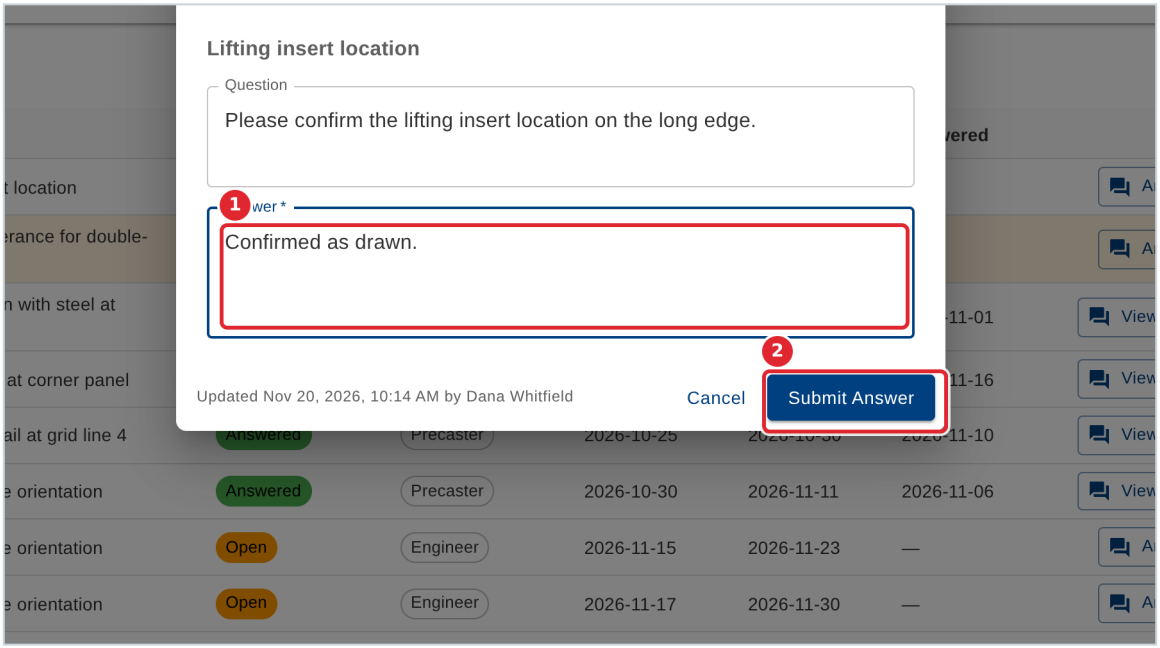
Step 1. Open the RFIs tab. The cards count open, overdue and answered RFIs. Select New RFI to raise one.



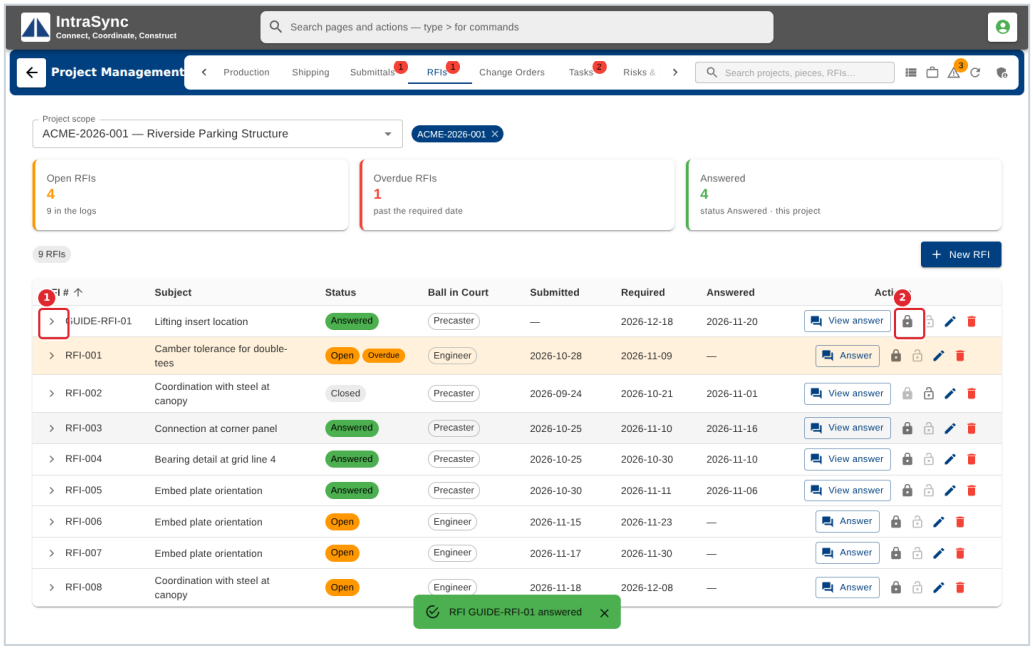
Step 2. Enter the RFI #, the Subject and the Question (all required), who has the Ball in Court, and the Required date. Select Create RFI.



Step 3. When the answer comes in, select Answer on the RFI's row.



Step 4. Type the Answer under the question and select Submit Answer.



Step 5. Open the row's arrow to read the question and answer. Select Close RFI (the padlock) when nothing more is needed; you can reopen it later.

Tips:

- RFI #, Subject and Question are required.
- An answered RFI shows View answer instead of Answer, where the answer can be read or corrected.

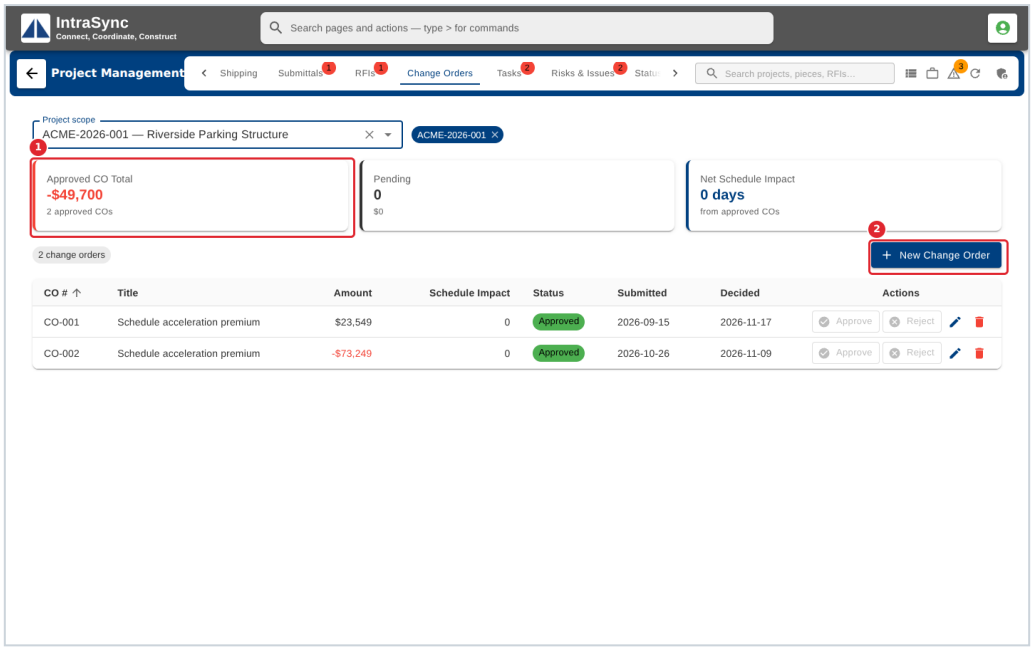
This is shown in the Project Management video at 0:59.

13. Raise and decide a change order

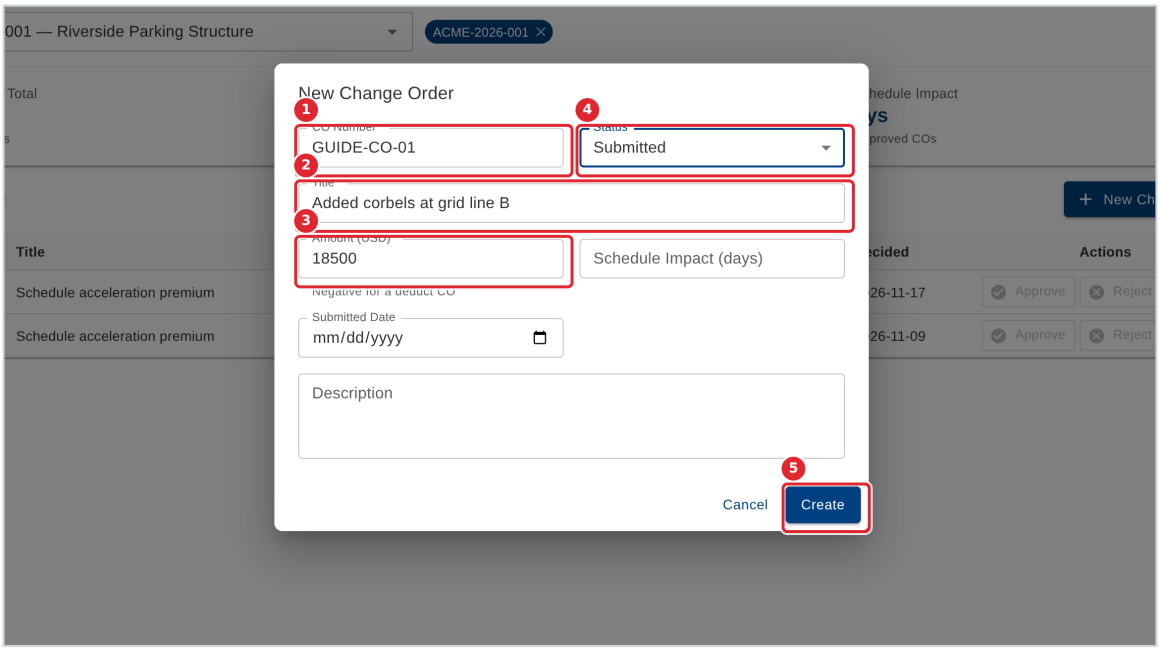
Record changes to the work with their cost and schedule impact, and approve or reject them.

Before you start:

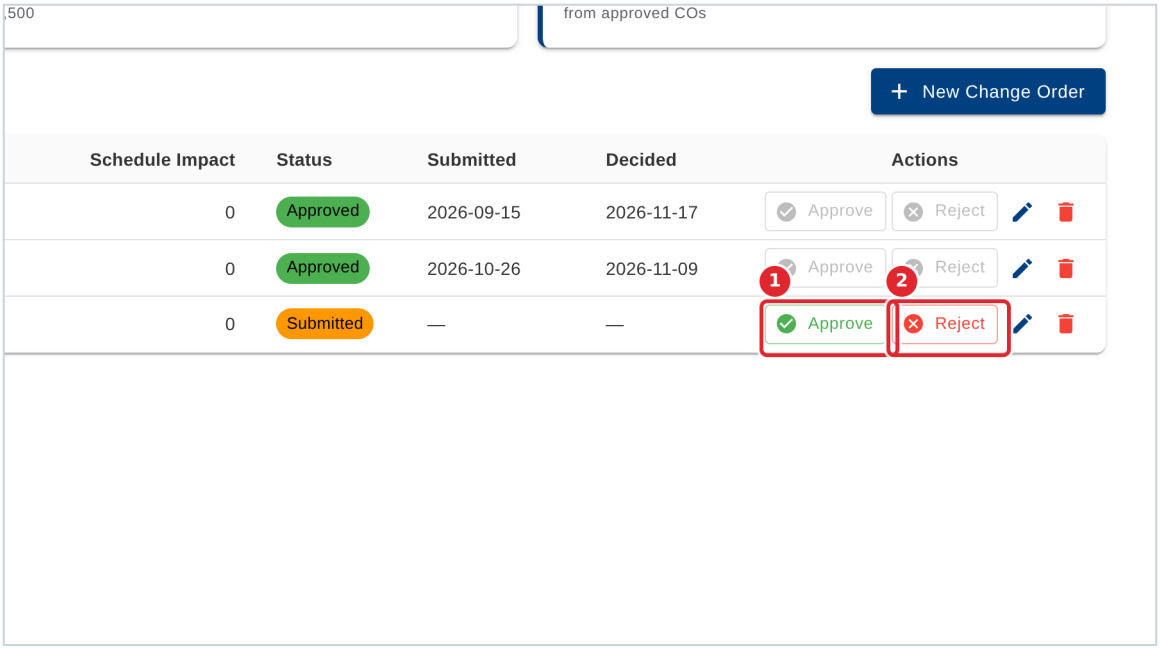
– A project is in scope, or choose the project in the form.



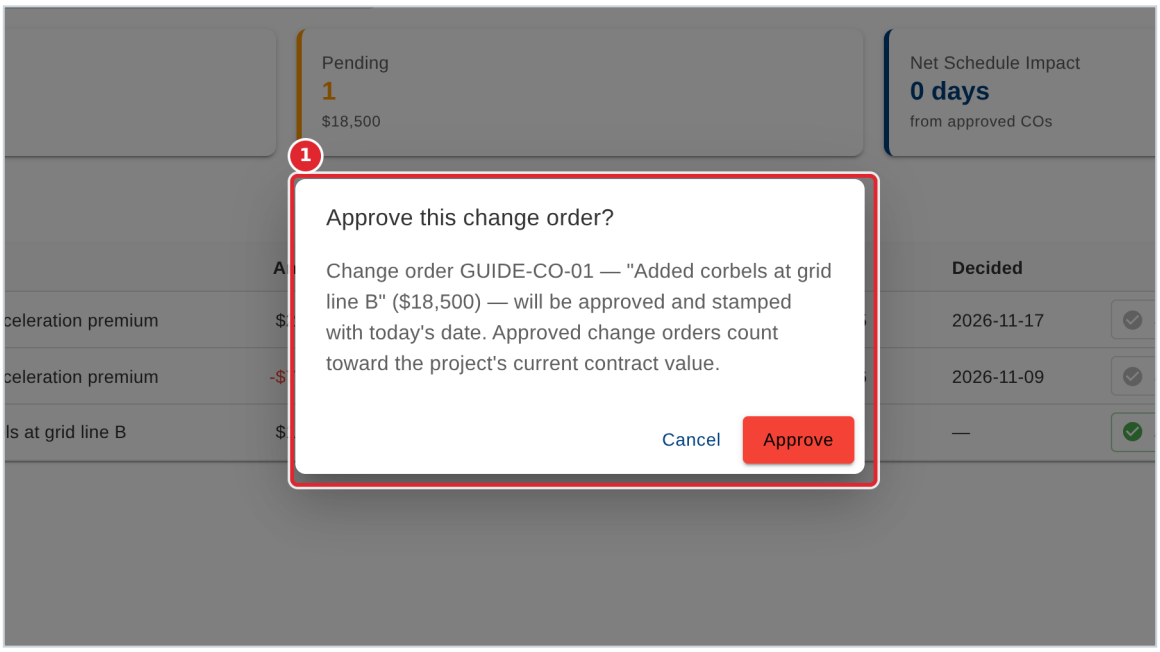
Step 1. Open the Change Orders tab. The cards total the approved change orders, the pending ones and the net schedule impact. Select New Change Order.



Step 2. Enter the CO Number, the Title and the Amount (all required; a negative amount is a deduct), the Status and any schedule impact in days. Select Create.



Step 3. A submitted change order can be decided: select Approve or Reject on its row.



Step 4. Confirm. The decision is dated today, and an approved amount moves into the project's current contract.

Tips:

- CO Number, Title and Amount are required. Enter a negative amount for a deduct.
- Only a submitted change order can be approved or rejected.
- Approved change orders add up into the project's Approved CO Total and its current contract.

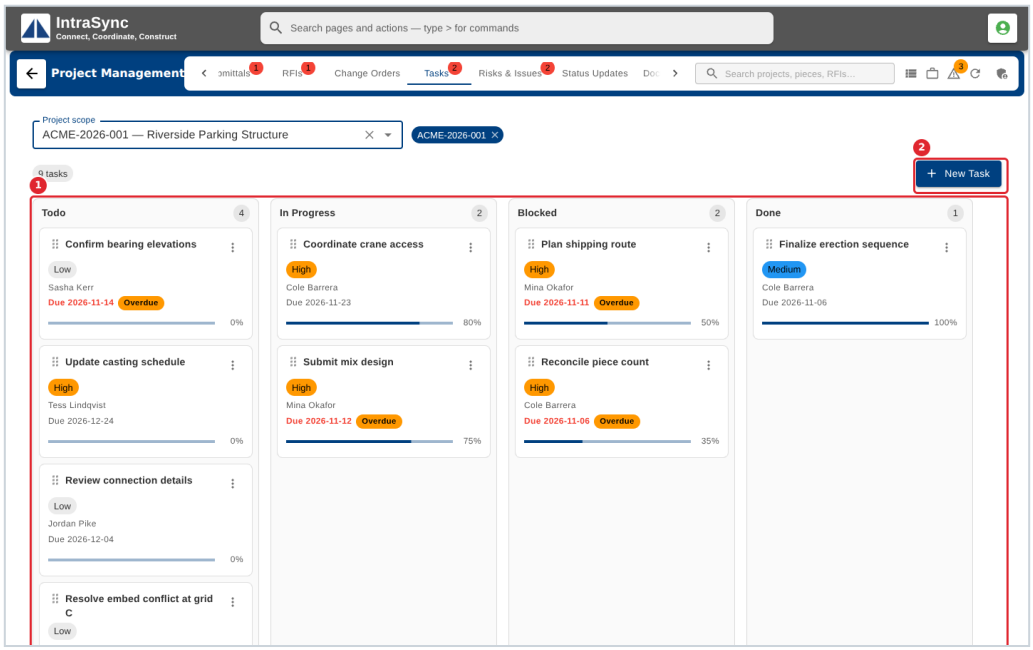
This is shown in the Project Management video at 1:02.

14. Work the task board

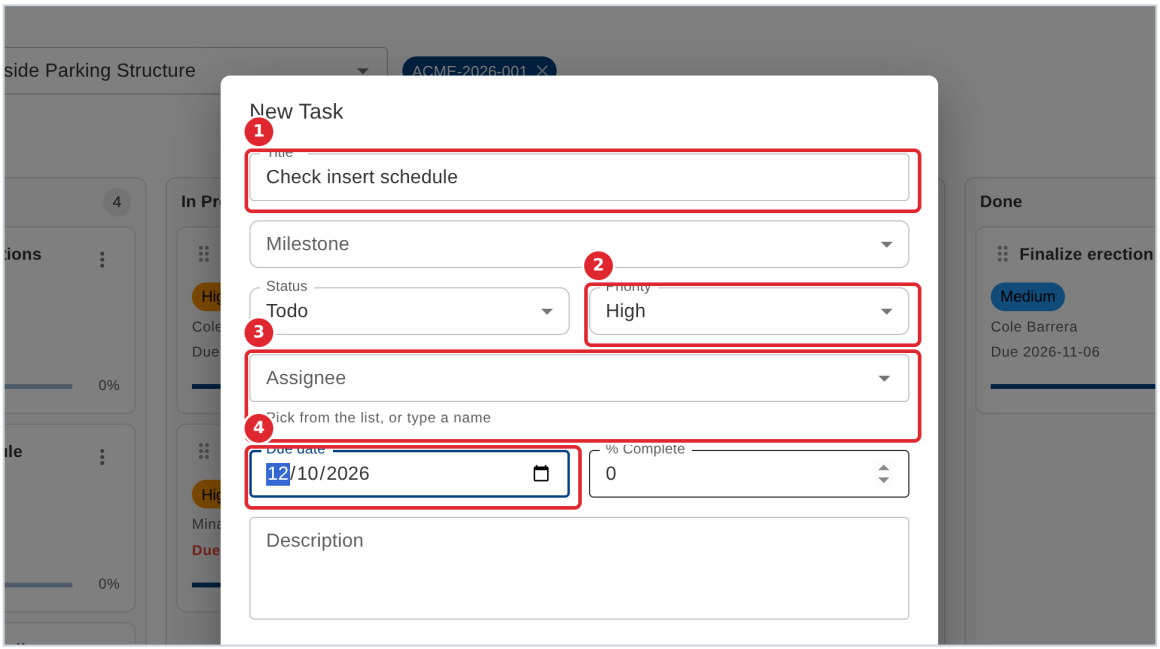
Assign the project's tasks, set their priority and due date, and move them across the board as work progresses.

Before you start:

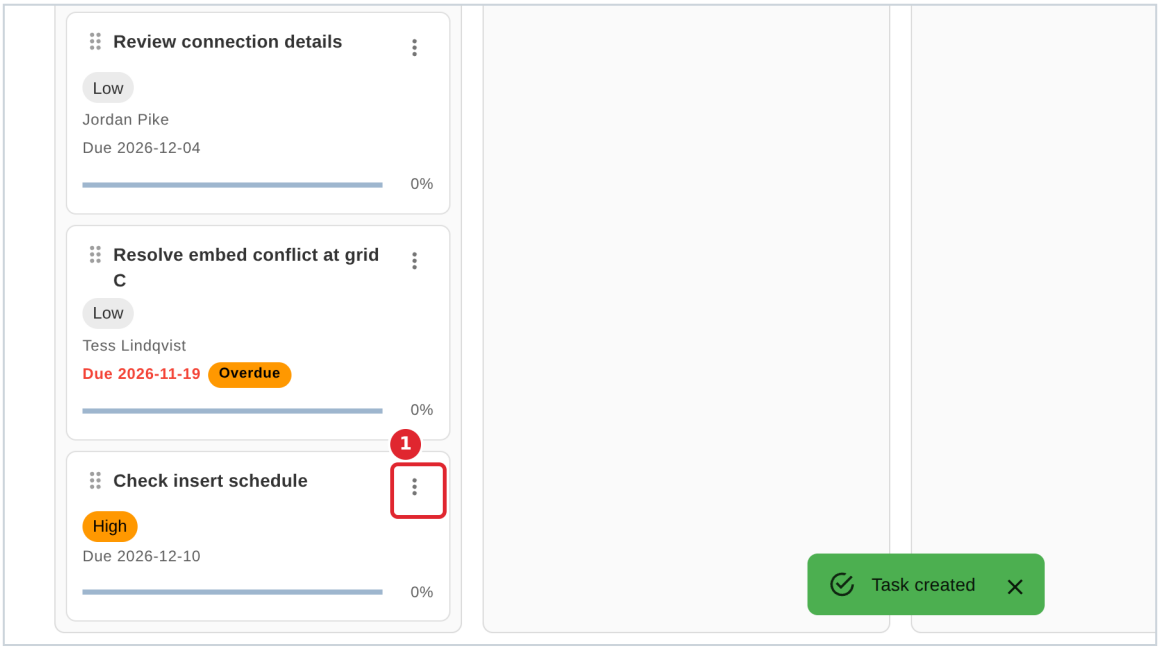
– A project is in scope to see its tasks.



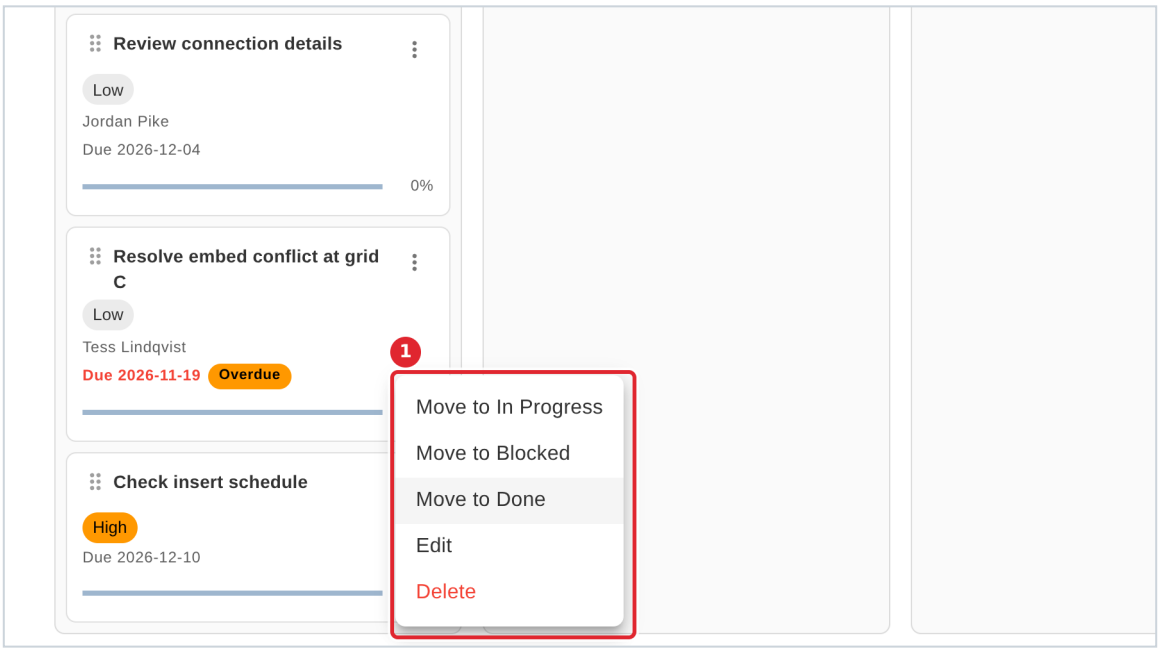
Step 1. Open the Tasks tab. Tasks sit in four columns: Todo, In Progress, Blocked and Done. Select New Task.



Step 2. Enter the Title (required), then the Priority, the Assignee (pick from the list, or type a name), the Due date and the % Complete. Select Create.



Step 3. To move a task, drag its card to another column, or open the card's menu.



Step 4. Choose Move to and the column, or Edit or Delete.

Tips:

- The Title is required.
- When editing a task you can add several assignees with a role and an allocation; those changes save at once.
- A task past its due date shows as overdue on its card.

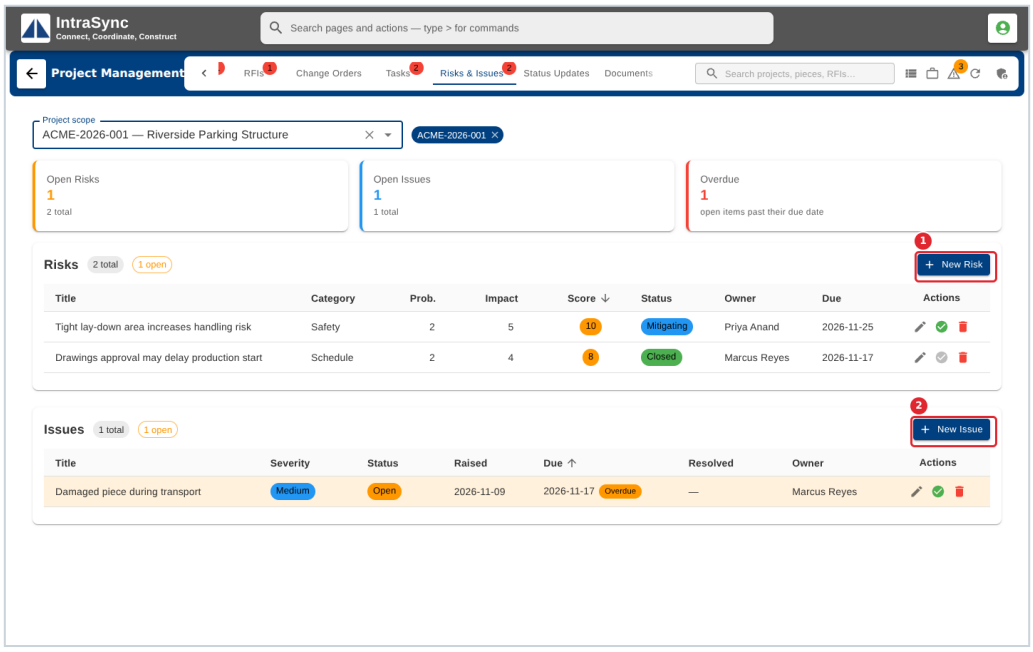
This is shown in the Project Management video at 1:06.

15. Log and close risks and issues

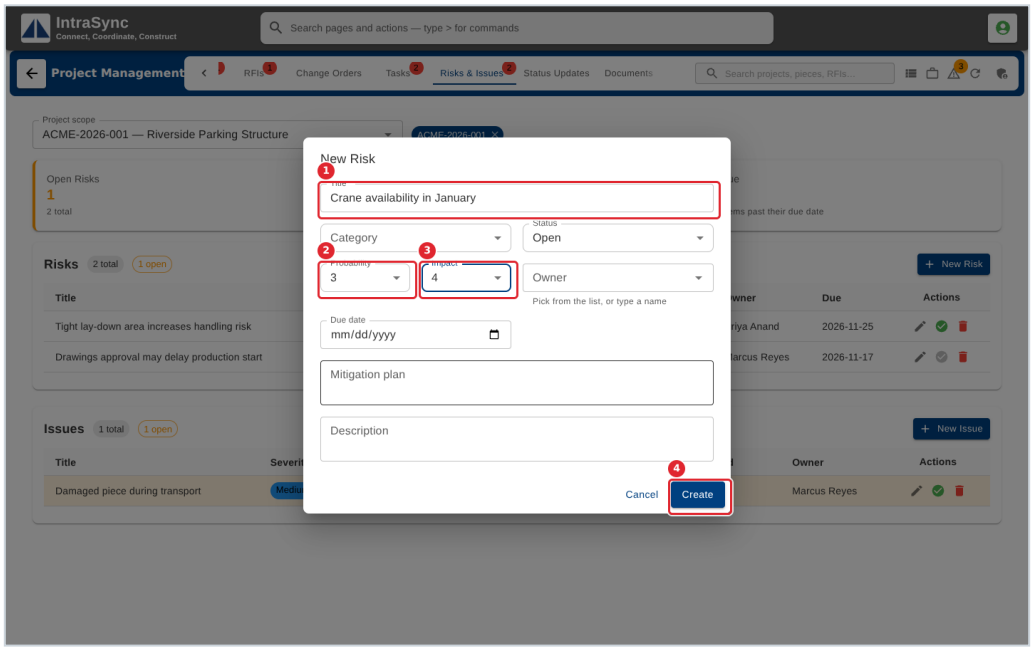
Keep what could go wrong and what already has in one place, with an owner and a due date for each.

Before you start:

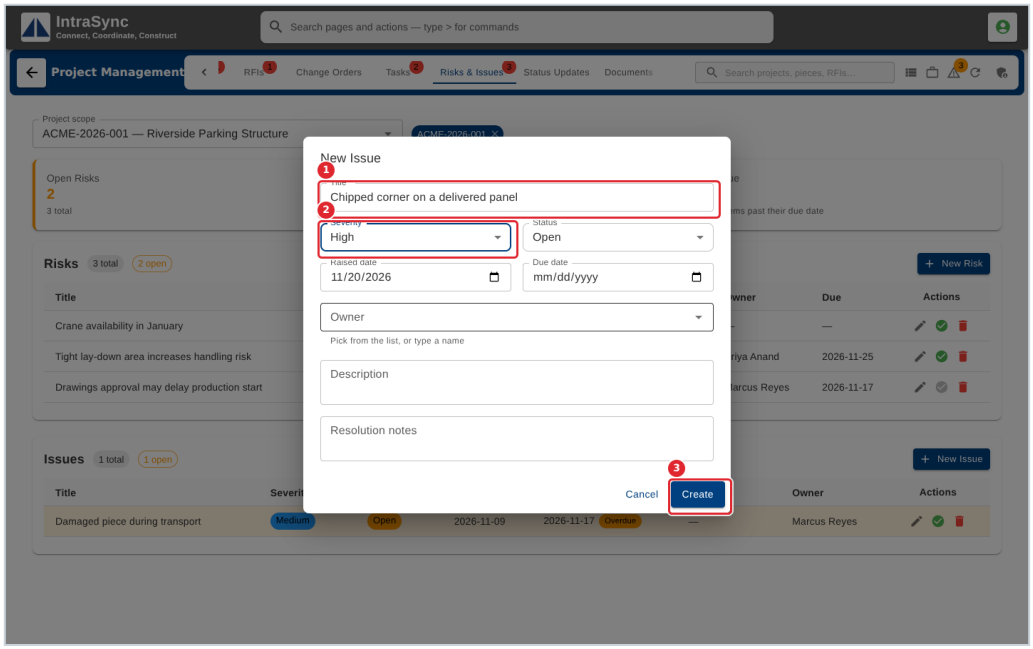
– A project is in scope. Adding a risk or an issue needs one.



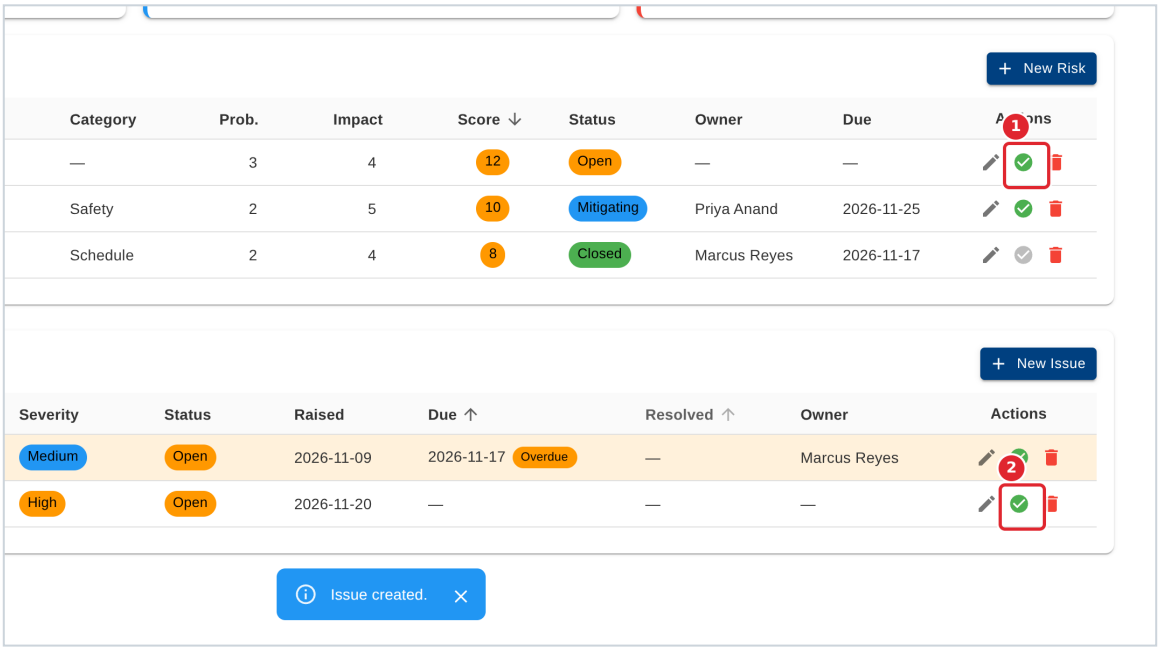
Step 1. Open the Risks & Issues tab with a project in scope. Risks are what could go wrong; issues are what already has. Select New Risk.



Step 2. Enter the Title (required), the Category, and the Probability and Impact from one to five. Their product is the risk's score. Add an Owner, a Due date and a Mitigation plan, then select Create.



Step 3. For an issue, select New Issue. Enter the Title (required), the Severity, the Raised and Due dates and the Owner, then select Create.



Step 4. When a risk has passed, select Close risk (the green tick) on its row. When an issue is fixed, select Resolve issue, the green tick on its row.

Tips:

- The Title is required for both.
- A risk's score is its probability times its impact; high-exposure open risks appear under Needs attention.
- Closing a risk or resolving an issue happens at once, with no confirmation.

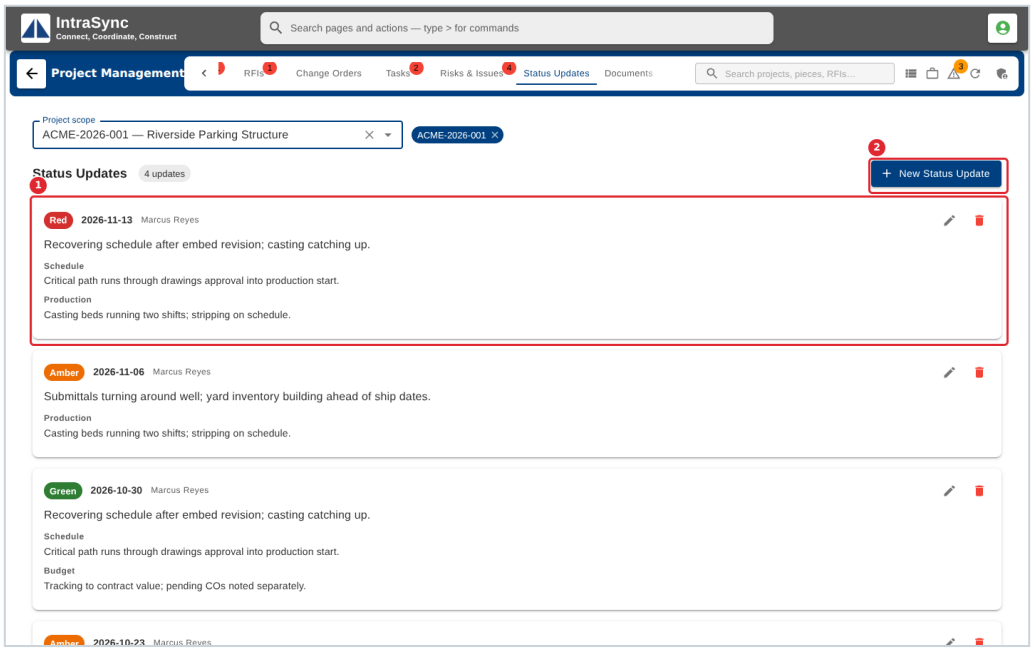
This is shown in the Project Management video at 1:09.

16. Post a status update

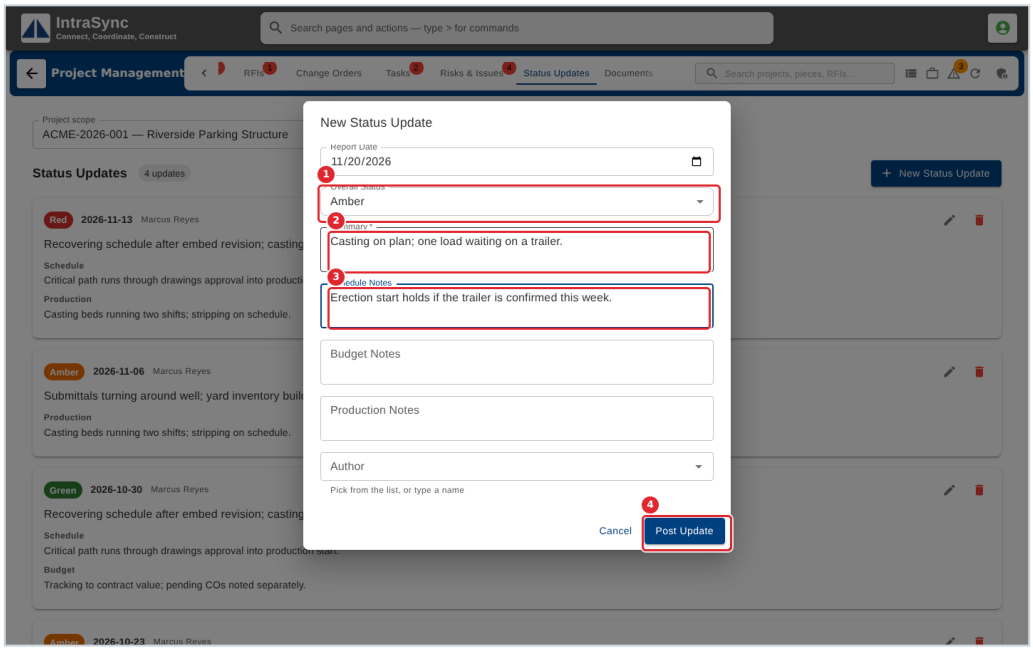
Report each project's overall status with a summary and any schedule, budget or production notes worth flagging.

Before you start:

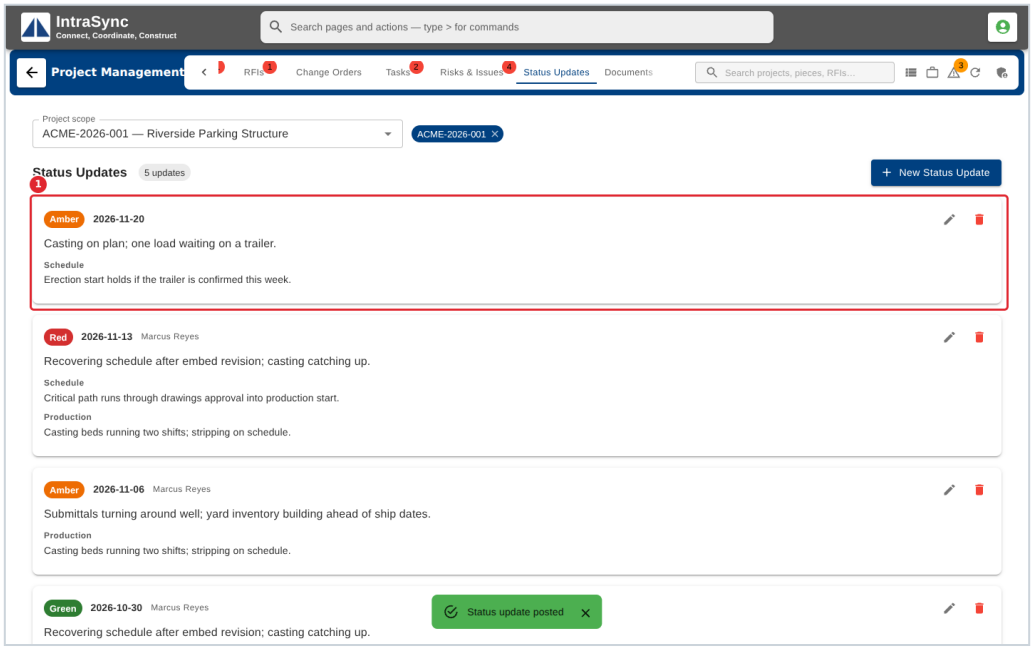
- A project is in scope, or choose the project in the form.



Step 1. Open the Status Updates tab with a project in scope. The feed shows each update, newest first. Select New Status Update.



Step 2. Check the Report Date, choose the Overall Status (green, amber or red), write the Summary (required) and any Schedule, Budget or Production notes, then select Post Update.



Step 3. The update leads the feed, and Project Detail shows it as the latest status.

Tips:

- The Summary is required, and Project when no project is in scope.
- The Report Date starts as today. Change it when you write up an earlier week.

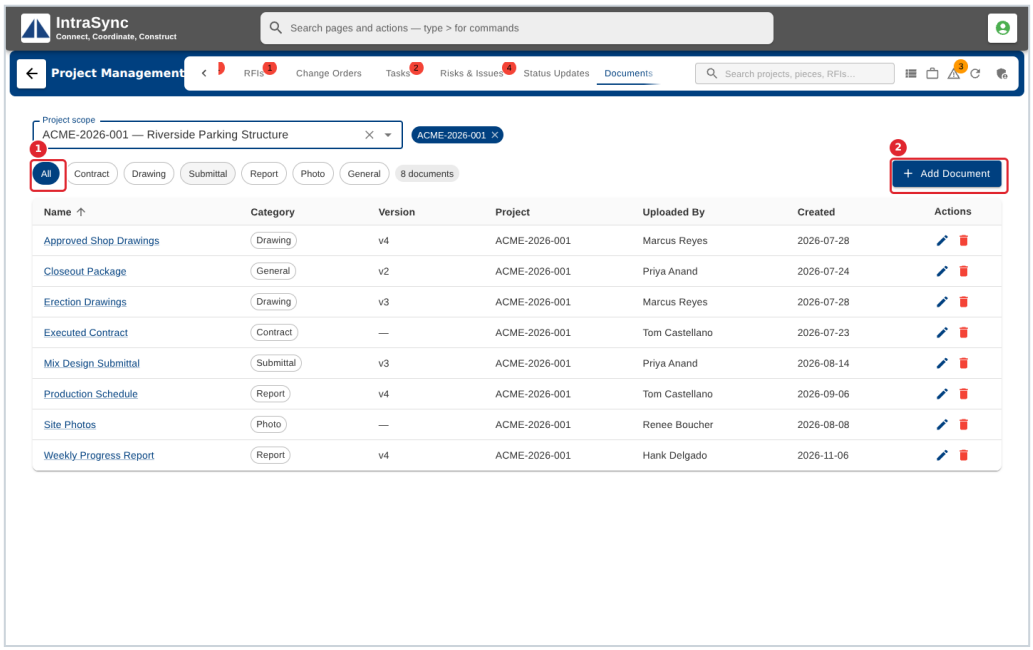
This is shown in the Project Management video at 1:13.

17. File a project document

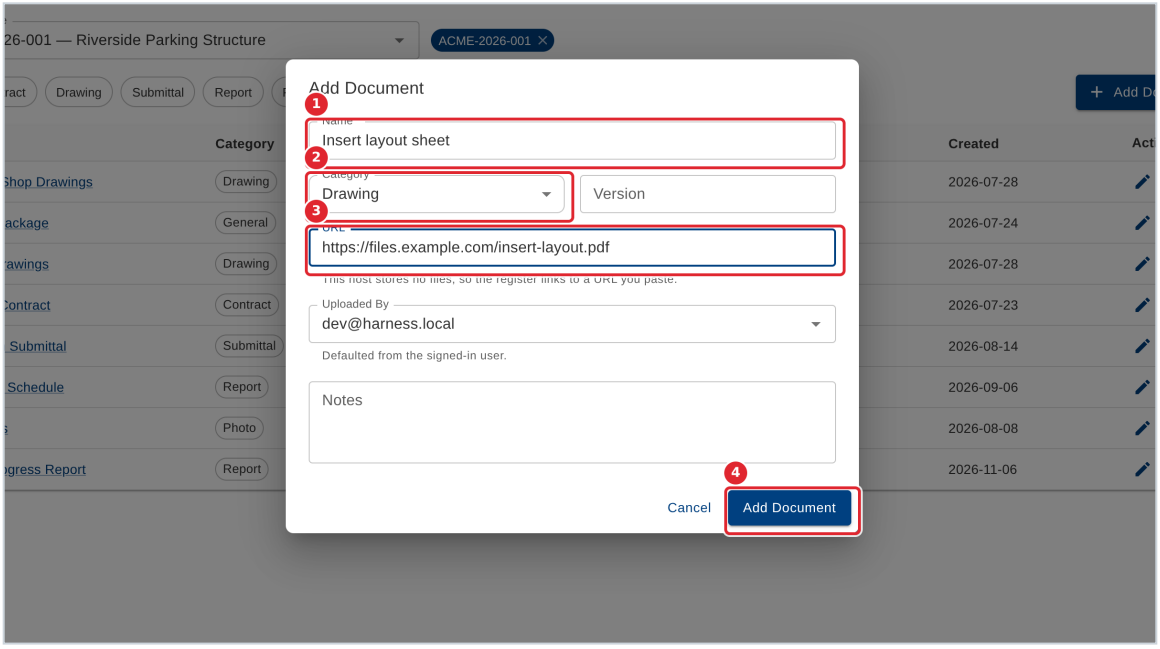
Keep contracts, drawings, submittal packages, reports and photos in one register so the whole team works from the same version.

Before you start:

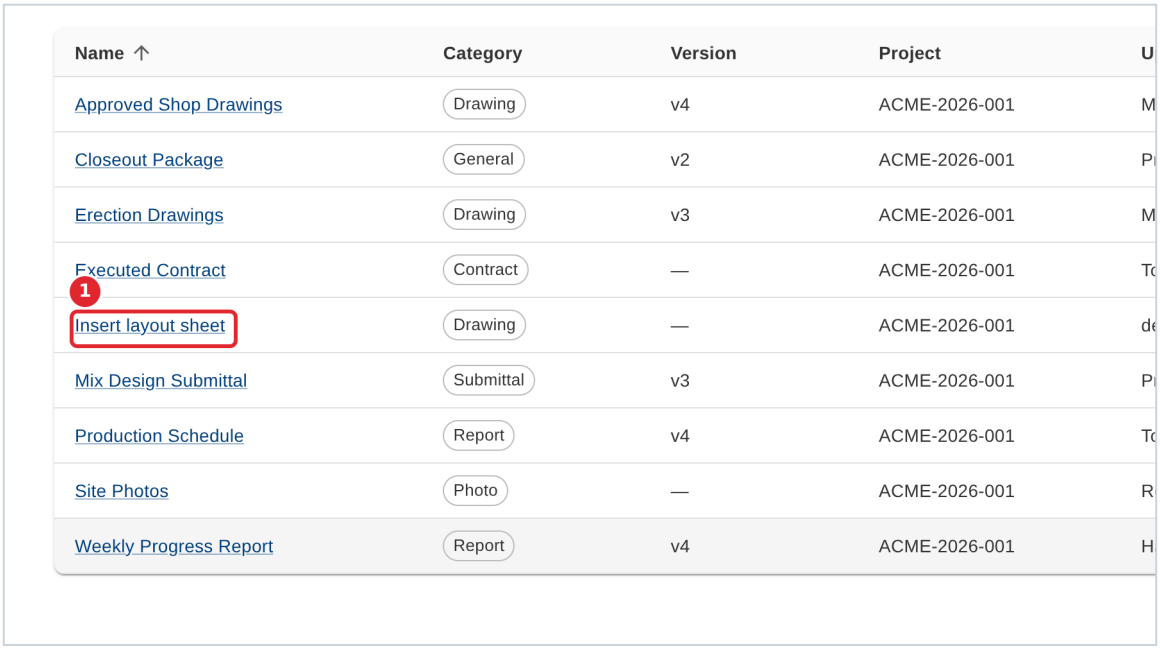
– A project is in scope, or choose the project in the form.



Step 1. Open the Documents tab. Use the category chips to show one kind of document. Select Add Document.



Step 2. Enter the Name (required), the Category and the Version. Where your system has no file store, paste the document's web address. Select Add Document.



Step 3. The document's name in the register opens it.

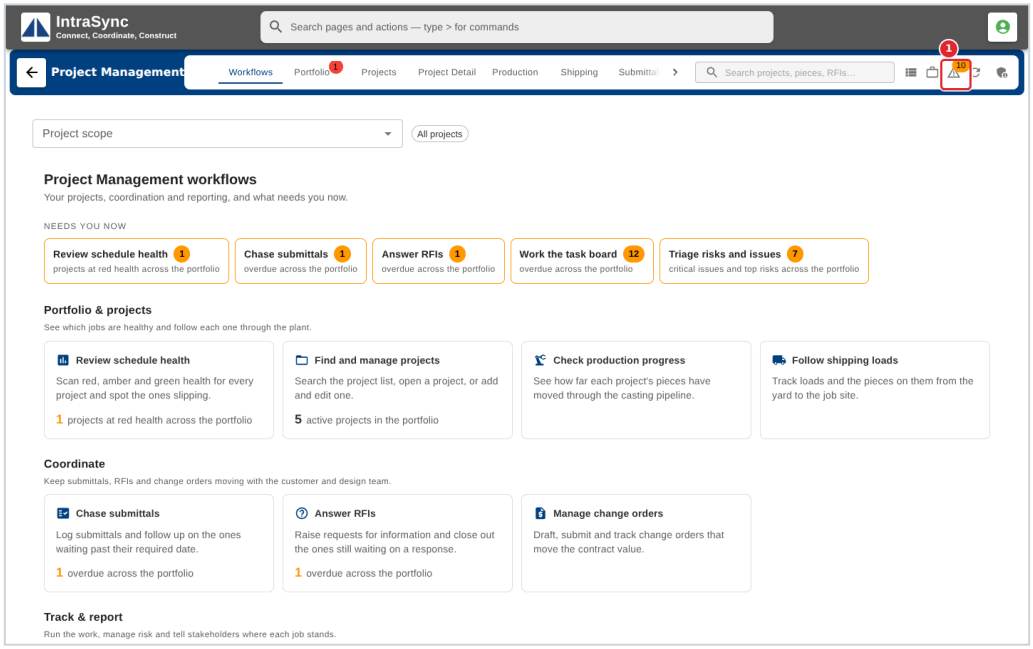
Tips:

- The Name is required ("Name is required").
- A web address must start with http: or https:, or be a relative path; anything else is refused with a message saying so.
- Deleting a document removes it from the register only.

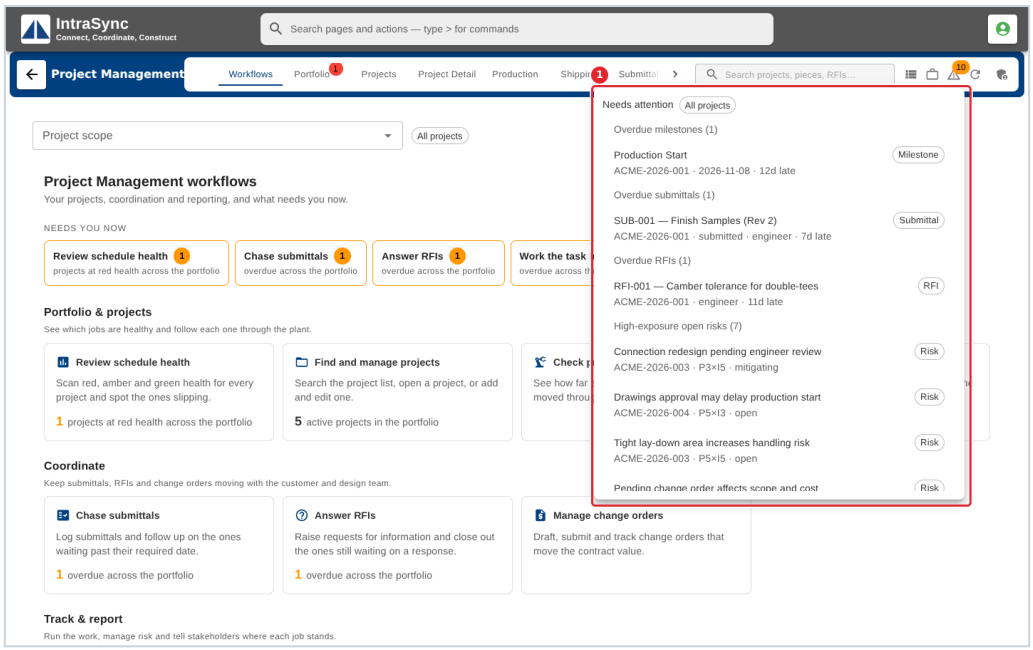
This is shown in the Project Management video at 1:16.

18. Work through what needs attention

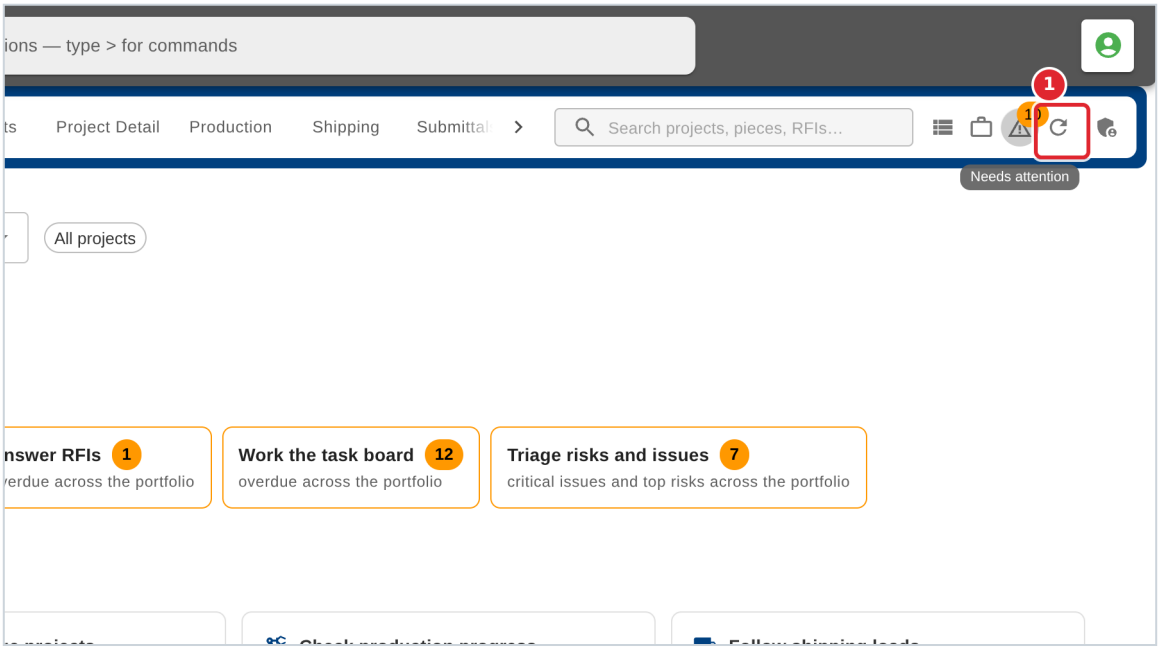
See everything overdue or critical across the projects in scope, and open each one where it is fixed.



Step 1. The warning icon in the header counts what is overdue or critical. Select it.



Step 2. The list groups overdue milestones, submittals and RFIs, open critical issues and high-exposure risks. Select a row to open it on its tab.



Step 3. Select Refresh data to reload everything. Its tooltip says when the data was last updated.

Tips:

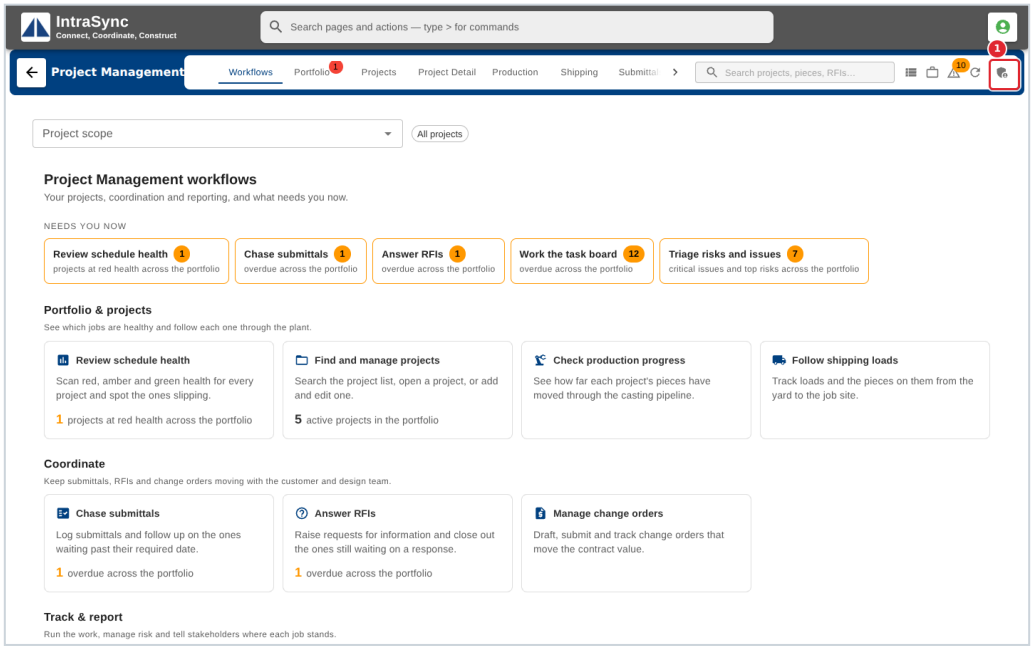
- When nothing is overdue or critical, the list says so.
- If a refresh cannot reach every source, a message says how many did not respond.

19. Check the module configuration and data health (administrators)

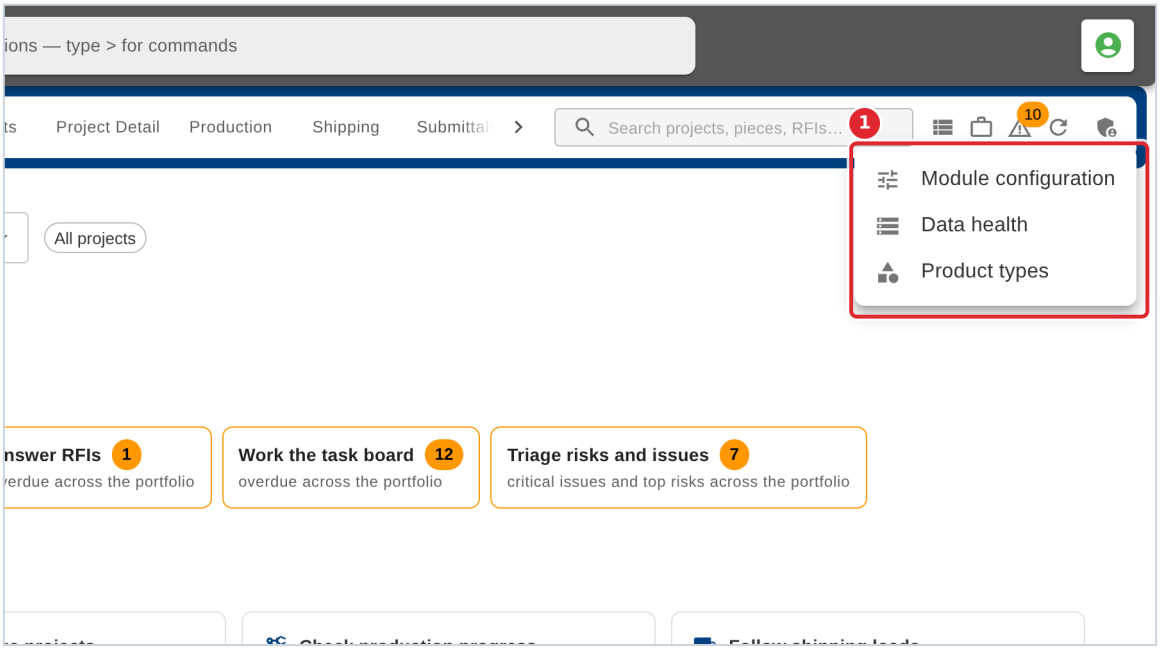
Confirm how the hub is set up for your company, and check that every data source has loaded.

Before you start:

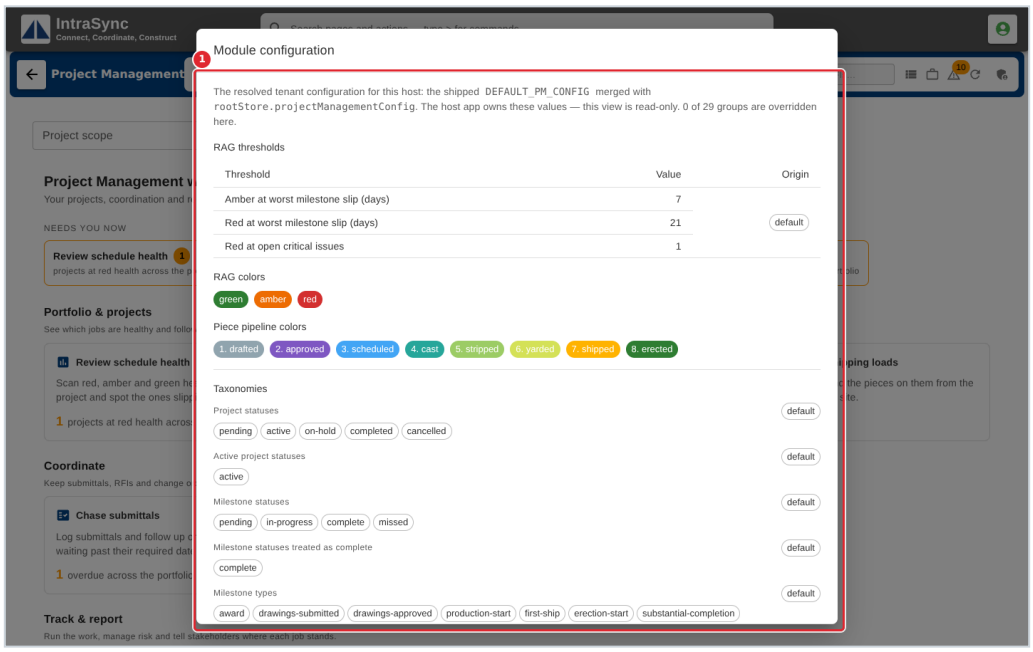
- You are an administrator. The admin button does not appear for other users.



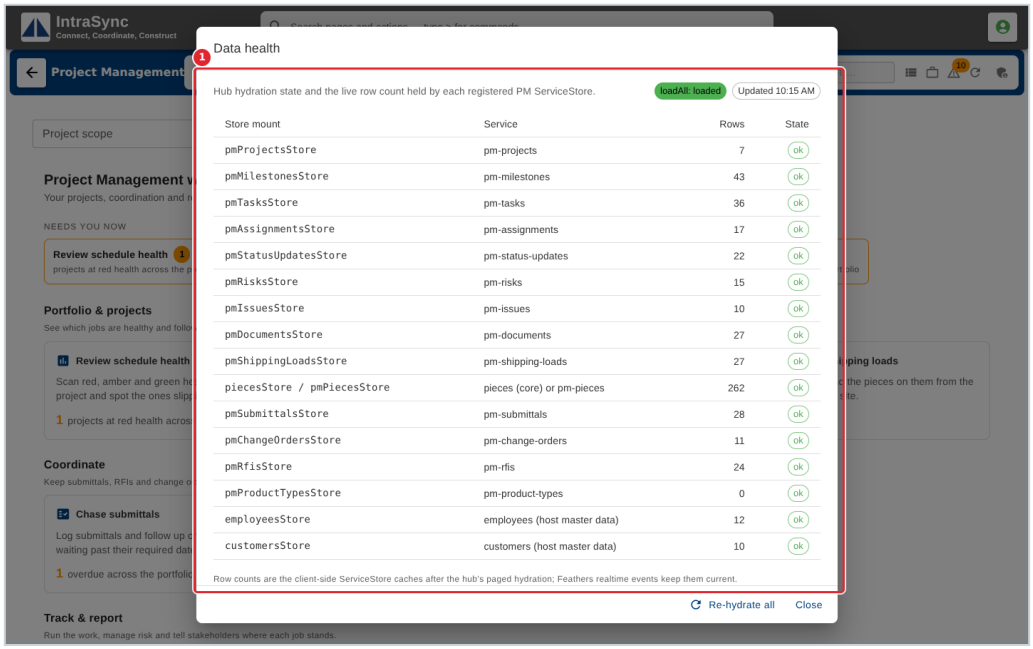
Step 1. Administrators see an admin button at the right of the header. Select it.



Step 2. Choose Module configuration or Data health.



Step 3. Module configuration shows the thresholds that turn a project amber or red, the colours, and the lists the hub offers. It is read-only: your system's administrator sets these values.



Step 4. Data health lists each data source with its row count and state. Select Re-hydrate all to load everything again.

Tips:

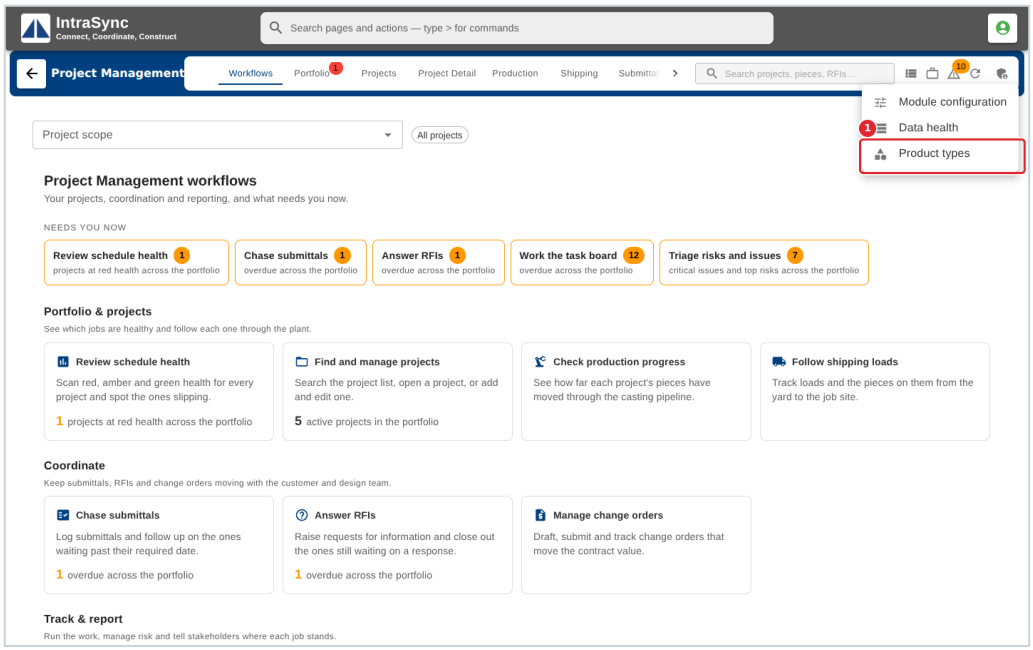
- Module configuration is read-only here. To change a threshold or a list, ask whoever administers your system. Product types are the exception: your company keeps its own list under Admin > Product types, and Module configuration says which list is in use.
- A data source marked with an error in Data health explains a tab that looks empty.

20. Maintain your company's product types (administrators)

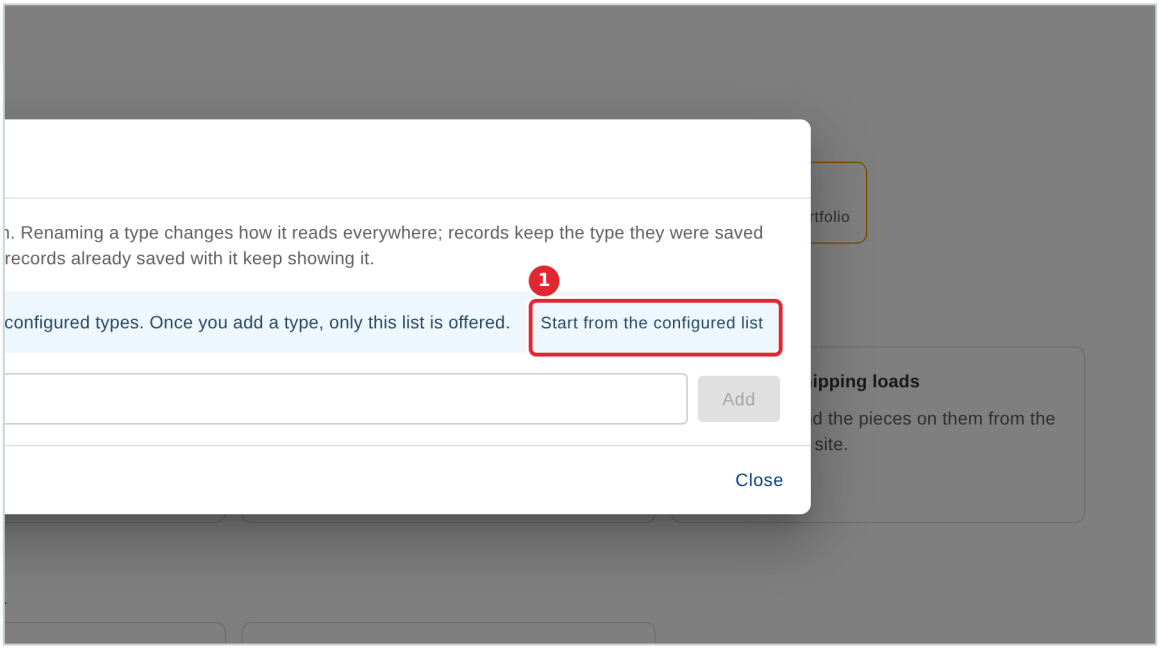
Keep the list of product types your team picks from when it adds or edits a piece, named and ordered the way your plant talks about its products.

Before you start:

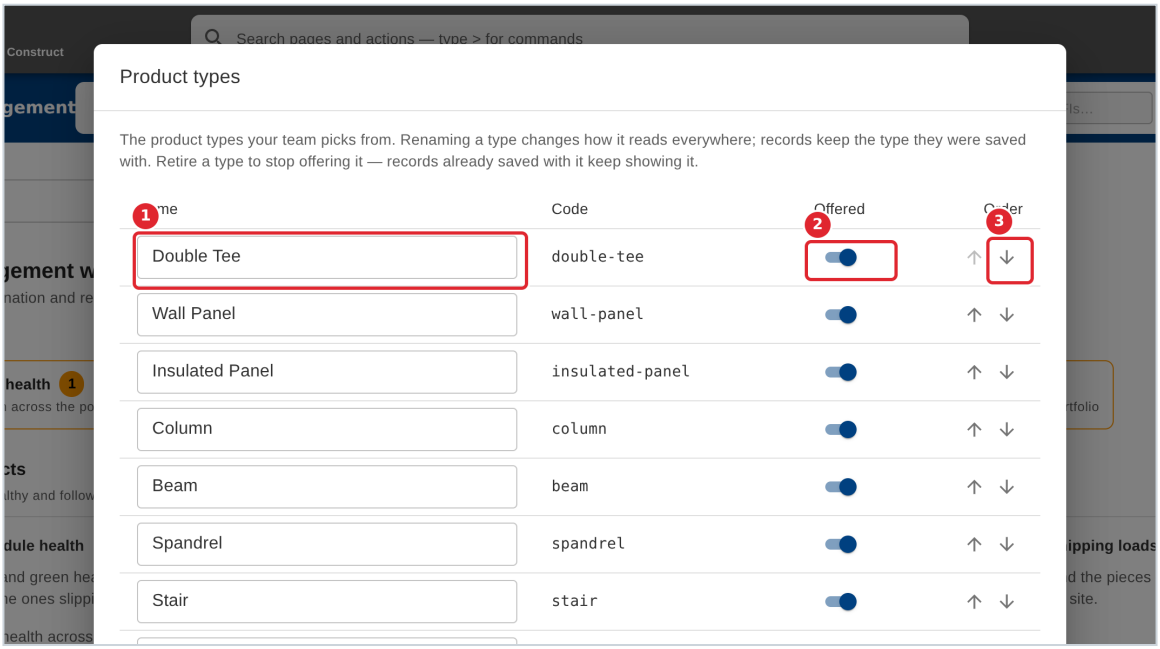
– You are an administrator. The admin button does not appear for other users.



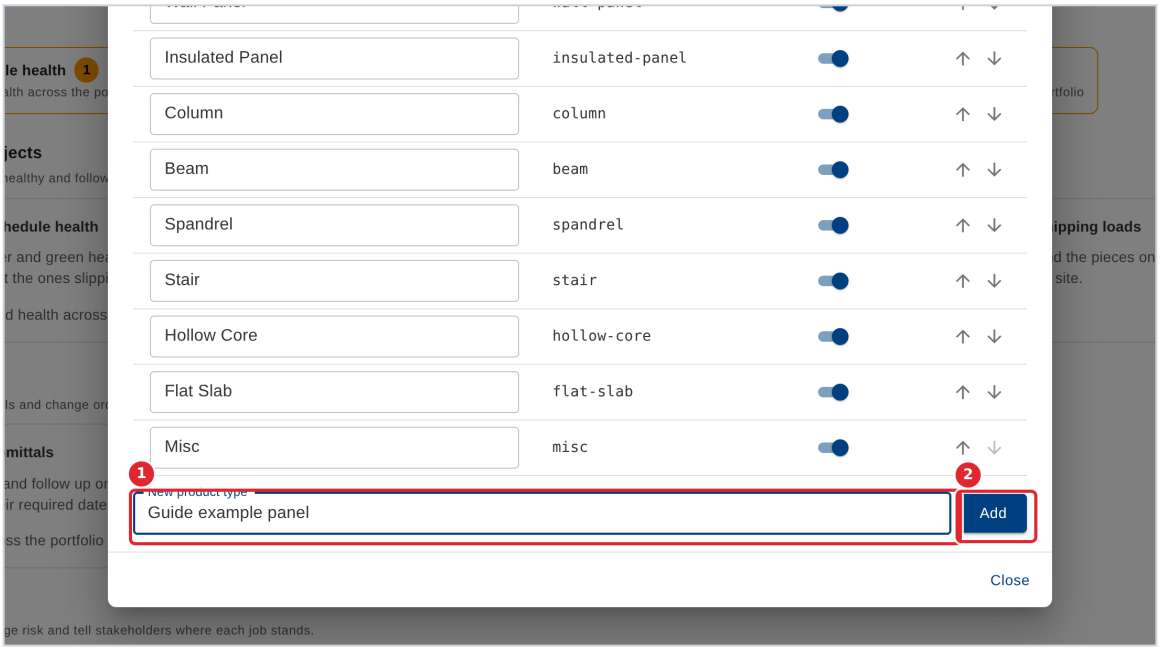
Step 1. Select the admin button at the right of the header, then choose Product types.



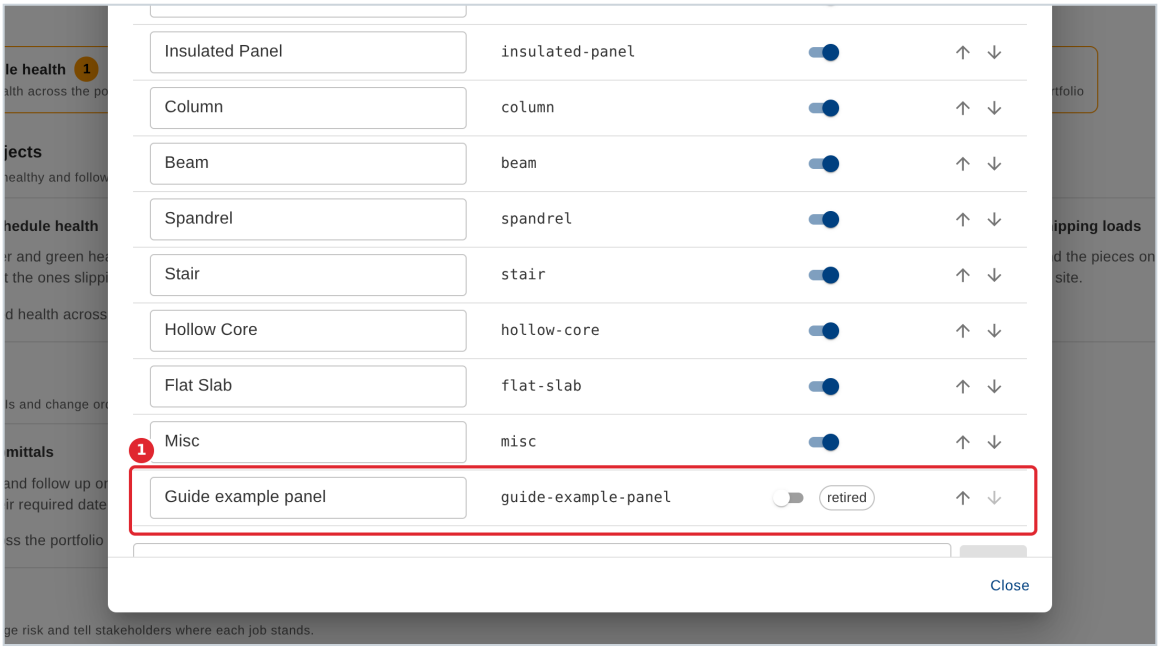
Step 2. Until your company has a list of its own, the pickers offer the configured types. Select Start from the configured list to copy them in as your first types.



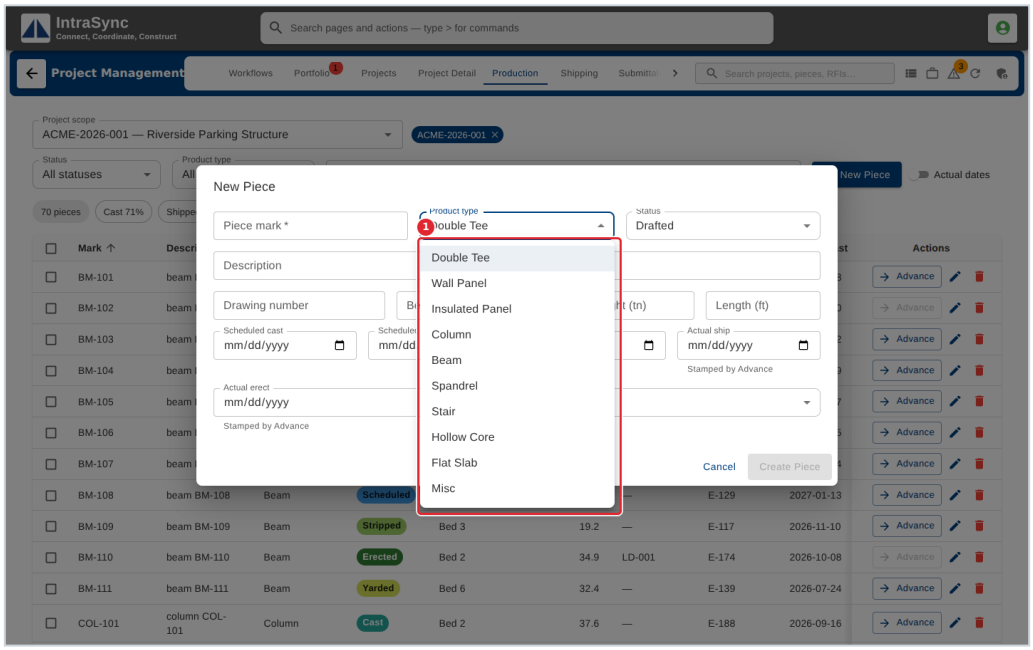
Step 3. Each type has a name you can change, a code saved on records, an Offered switch and arrows to set its place in the pickers. To rename a type, edit its name and press Enter.



Step 4. To add a type, enter its name in New product type and select Add. It goes to the bottom of the list.



Step 5. To stop offering a type, turn its Offered switch off. It is marked retired, and records already saved with it keep showing it. Turn the switch on again to restore it.



Step 6. Every product-type picker in the hub, such as the one on a new piece, now offers your list in your order. Retired types are not offered.

Tips:

- Until your company adds its first type, the pickers offer the configured list. Once your list has a type in it, only your list is offered.
- Renaming a type changes how it reads everywhere, including on pieces already saved with it. The pieces themselves are not changed.
- There is no delete. Retire a type instead: it is no longer offered, and records saved with it keep showing it.
- A new name that matches a type you already have, retired ones included, is refused. Rename or restore that type instead.
- If every type is retired, the pickers offer none. Restore one or add a new type.

This is shown in the Project Management video at 1:20.

Glossary

- RAG: Red, amber or green: a project's overall health, from its milestone slip and open critical issues.
- Scope: The one project the hub is focused on. With no scope, tabs show every project.
- Slip: How many days a milestone's forecast or actual date runs behind its planned date.
- Submittal: A drawing, sample, calculation or product data sent out for approval.
- Ball in court: Who has to act next on a submittal or RFI.
- RFI: A request for information: a question to the design team or customer, and its answer.
- Change order: A recorded change to the work, with its cost and schedule impact. Approved ones change the contract value.
- Load: A group of pieces shipped together on one trailer.