

Guide to Project Management Progress Reporting

What needs to be completed and why??

The Table below shows what should be completed per project and why so as to get an overview of the Project or Programme.

The following files are required per Project:-

File Type	Document/ Form	Page	
Word	Progress Report	Page 4	
Word	Resource Management Report	Page 4	
Excel	Risk & Issue Report	Page 5	
Visio/Word	Stakeholder Map	Page 5	

This guide is for use by anyone who wishes to use the Project Management Method electronic templates supplied by Flex Management Solutions to develop Project Management deliverables to the standards set by the Project Management Method. Basic knowledge of Windows and Microsoft Word is assumed.

1 GETTING STARTED

To use one of the templates, simply copy it from the drive, rename the file and move to your working directory. You can then update the document as you would a normal Word, Excel or Visio document (if you have).

2 USING WORD FACILITIES WITH THE TEMPLATES

The templates have been designed to help reduce the amount of effort needed to create the Project Management deliverables required by the method. The use of the templates will also ensure that deliverables produced by each project will have a standard look and feel.

A number of Word facilities have been used in the templates which will need to be understood if the templates are to be used effectively. If you are already familiar with these facilities, you will not need to refer to the remainder of this guide as the facilities have been used in a standard way.

The features that will need to be understood are as follows:

- Headers and Footers
- Heading styles and styles for text
- Table of Contents
- Word tables
- Fields

These are described in the following paragraphs. In some cases, the explanations are required to be able to use the templates. In other cases, an explanation has been given to help you understand why the document is behaving as it is.

2.1 Headers and Footers

Headers and footers are defined to run along the top and bottom of each page in a document to provide a context and referencing system for ease of navigation and to uniquely identify the document and version. The templates provided have already had headers and footers added but these will need to be updated when the document is developed.

As a general rule, wherever you see text enclosed in <>, you must replace it with text relevant to this particular document/form.

☞ To open the header or footer, select '**Header and Footer**' from the **View** menu. This will give you the header to update. You will also see a small toolbar appear as follows:



☞ To switch between the header and footer, click on the left-most button on this toolbar - you can now update the footer. To get back to your document, click on the 'Close' button.

Detailed guidance here is slightly different for documents or forms as follows:

In documents, headers are of the form:

<Company Logo>

Name of the Document

(Most of the Templates will already have a working Header or Logo inserted).

Project Name and Status should be updated to match the name of your project and the status of this document (e.g. Draft or Issued). The name of the document should not need to be changed.

Footers are of the form:

File location and filename

Page 1 of 1

Date

All forms have only been given footers (not headers). The standard footers should contain the name of the project. You will need to open the footer and type in your project name before you print the form.

2.2 Word tables

Word tables have been used extensively throughout the templates - particularly on the forms. In many cases, you will need to add extra lines (rows) to a table, either in the middle or at the end, to be able to add more information.

To insert a row in a table:

- ☞ If you want to insert a row in the middle of a table, put your cursor somewhere in the row **below** where you want the new row to be. Select **Table** from the menu bar and select **Insert Rows**. If you select two rows and then select this option, Word will insert two new rows and so on.
- ☞ If you want to insert a row at the end of a table, put your cursor in the very last cell of the table and press **Tab** - Word will add a new row to the end of the table.

When you create a new table, it is usually created without a border - i.e. the cells will be visible on the screen but the lines will not print out. Also, when you insert rows into a table, you may find that borders of new rows do not match the borders of existing rows. If you wish to add or change a border:

- ☞ Select the cells of the table around which you want to put a border.
- ☞ Select **Format** then **Borders and Shading** from the main menu.
- ☞ Select the style of border you want to apply and click on **OK**.

Hint - you can also add borders round text - simply select the text and follow the same instructions as for a table. (The lines below headers and above footers in the document templates were created this way.)

If a table has a heading row at the top, it is possible to make sure that the heading row appears on subsequent pages if the table becomes too long to fit on a single page. This has been done on a number of the forms templates so that you will not need to create new heading rows for each page. The way in which this is done is as follows:

- ☞ The row(s) required for the heading are selected and **Headings** is selected from the **Table** menu.

2.3 Fields

Fields are used in a number of the templates so it is useful to know what they are. It should not be necessary to know how to insert or update fields to be able to use the templates.

A field is a code that can be used to insert changeable information into a document such as the date or number of pages. Each time the document is changed, the field will take on the most recent information. Sometimes (as for the Table of Contents), a field will not be updated automatically - you may need to select it and press the F9 key to update it.

Fields are used in the following places:

<i>Field</i>	<i>Ref</i>	<i>Where used</i>
The name of this file	Filename	In the footer of every document (not form)
Page Number	#	In the footer of every document and form
Number of pages in document	NumPages	In the footer of every document (not form)

There should be no need to amend these fields - they will update themselves automatically. However, if you delete a field accidentally, you may wish to know how to insert a new field. This is done as follows:

- ☞ For Filename and NumPages, select **Insert** then **Field**. Scroll down until you find the field you require.
- ☞ For the page number in the footer, click on **#** on the header/footer toolbar.

3 PROJECT PROGRESS REPORT

The Project Progress Report is in a Word template this is to report all progress on the Project by either recording deliverables that are in progress, behind schedule or delivered on time.

There are also different ways of reporting the status of the Project:-

Milestones – Critical Timeline (Date) by which the Project is assessed to be on time or late

Deliverables – A Deliverable is a task or activity that is delivered to the business for example a Database is required by an area and IT have a task in their plan which says “Database Go-Live” this is a deliverable to the business.

Risks & Issues – This Risk and Issue section in the Highlight Report is just to highlight particular Risk and Issues for that particular week and any other Risk and Issues must be put in to the Risk and Issue specific report as detailed below.

Critical Success Factors – These are Milestones, Deliverables or anything that progresses the Project on time and thus a Critical Success.

Outlook for Next Period – This should be a brief bullet pointed view of work to do in the next period for example Deliverables, Milestones or Tasks/Activities that are planned to be completed for next period.

Please also ensure that the following are also completed to ensure the form has been completed with all of the relevant information required by Project/Programme Management for tracking purposes:-

- **Project Manager**
- **Project Sponsor**
- **Date of Report**
- **Current Report Number**

4 RESOURCE MANAGEMENT REPORT

The Resource Management Report is to highlight resourcing issues that arise and try to resolve them by going through the forms criteria so as to not only get the right resource but to also see if there is already a resource within the PCT that fits the criteria.

Again the standard information must be completed such as:-

- **Project Name**
- **Project Manger**
- **Role Name**
- **Length of Time Required**

After the initial Blank Form in the Resource Management Report file there are some examples of the type of Responsibilities, Main Activities and Requirements for a Senior User, Project Manager, Team Manager, Project Support/Administrator and a Project Consultant that should give you and good idea of what is required on the form.

Any other information that is required should be entered into the Additional Information box.

5 RISK AND ISSUE LOGS

The worksheets in the Risk and Issue spreadsheet show the format for risk and issue logs for the Programme/Project Management.

To raise an issue or risk at Programme/Project level insert a new line in the appropriate worksheet with the details of your Risk/Issue and send it to the appropriate Manager/Administrator of whom will acknowledge upon receipt and keep you informed of progress.

These definitions are MSP compliant.

The purpose of the Risk and Issues Log is so that you can see the current risks and issues and provides examples of how the format should work.

You will no doubt note the gaps (i.e. there are not many owners identified, and more information is required to score some of the risks) - this is demonstrating that the logs are always a working document, and the only reason for maintaining them is to frequently review and take any necessary actions.

MSP also stipulates that risk management and issue resolution strategies need to be developed. Draft versions will be available shortly. These will address reviewing, reporting, two-way information flow, linkages with other Programmes/Projects etc.

Definition: Risks are things that may happen at some time in the future and require positive management to reduce their likelihood of happening, their impact on the programme, or both.

Programme level risks are risks that may impact the Programme/Project and need Managing at Programme Level - either because several Projects have raised the Risk, or the Risk lies in interdependencies between Projects.

Definition: Issues are things that are happening now that are affecting the programme in some way and need to be actively dealt with and resolved. Risks, should they occur, become issues.

Programme level Issues are Issues that are impacting the programme and need managing at programme level - either because several projects are affected, or the Issue lies in interdependencies between Projects.

6 STAKEHOLDER MAPS

The Stakeholder Maps are to give an instant overview of who is involved in the Project/Programme and at what level. If the Stakeholder Maps are filled out correctly you will be able to see who the main resources are within the Project for example the Project Manger, the Sponsor etc and whether they are Accountable, Responsible, Consulted or Informed by the Project Board.

The Stakeholder Map should contain the Board/Project Members to ensure that all communications are going to the right people and to also ensure that if there are parts of the Project that require a particular section to get involved and/or deliver part of the Project they must be aware of current status and what is planned.