## Document version

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.0</td>
<td>14/02/2022</td>
<td>2022 Reporting Dates added</td>
</tr>
<tr>
<td>3.1</td>
<td>10/04/2022</td>
<td>Guidance amended to introduce new ProTRAC Financial Module</td>
</tr>
</tbody>
</table>
Monthly Status Reporting

To support project reporting to the Chief Operating Officer (COO), the Project Governance Office (PGO) requires Project Managers to complete monthly updates of their project’s status.

The status update should be kept in line with your steering committee reports. Please use the Status page within your project record.

The Project Performance and Monitoring Criteria and Tolerances are available within the page for ease of reference (see Guidance Notes), and are also available on the Project Governance website (UQ login required).

The PGO take a snapshot of the data within the Status Update fields to support historical reports, so remove excess data and leave only your recent update.
Data quality

• You know the saying…
• You are accountable for data quality.
• Data quality means… accuracy, completeness, update status, relevance, consistency, reliability, appropriate presentation and tone, and accessibility.

• Key messages, evidence based, succinct
Log into ProTRAC

1. Navigate to https://uq.sharepoint.com/sites/pwa-coo/
2. Log in as below –
• You should be able to view the projects you are Project Manager of (view and edit access), and projects you are a team member of (read-only access).

• If you cannot locate your project, please email pgo@uq.edu.au for assistance.

• Select the Project hyperlink to access the project record
Project editing workflow

Edit (check out) → Save → Close (check in)

PROJECT ribbon

Remember to keep saving your work as often as possible!

Publish (schedule) → Close (check in)

TASK ribbon (when editing Schedule)
Monthly Reporting Requirements Checklist

1. Verification of finances (including forecasts)
2. Status Update
3. Project Schedule
   a) End Date
   b) % Complete
   c) Milestones

[Image of ProTRAC Project Information]

Status Update

- Navigate to project **Status page**
- Under Project ribbon, click Edit
- To update the performance indicator, click the button and select the appropriate indicator (i.e. Red, Amber, Green)
- Repeat for each Project Performance criterion, and complete commentary where required
- Save
Verification of Finances - Actuals

*Note: use of this module is for projects with an existing UniFi project code/s. If your project is Operationally funded, bypass this step*

- Navigate to the **ProTRAC Financial Module**
- View your financial summary via the Summary tab, and check your actuals transactions
- If there are any inconsistencies, please email pgo@uq.edu.au

Resources (UQ login required) –

- QRG - Navigation (PDF, 307KB)
- QRG - Export financial summary report (PDF, 307KB)
- QRG - View and download transaction details (PDF, 340KB)
Verification of Finances - Forecasts

Note: use of this module is for projects with an existing UniFi project code/s. If your project is Operationally funded, bypass this step

• Update your forecast against purchase orders and blank entries in the ProTRAC Financial Module
• Enter new purchase forecasts (including labour)

Resources (UQ login required) –

QRG - Update forecast against purchase orders and blanks (PDF, 289KB)
QRG - Enter a purchase forecast (PDF, 295KB)
QRG - Enter a labour forecast (PDF, 383KB)
Maintaining your schedule in ProTRAC

The Project Governance Office requires Project Managers to complete the following within the Schedule detail page of their project record –

• **Start and End Dates**
• **% Complete**
• **Key Milestones** (as defined in your Project Management Plan)
• **Proactive updates of project milestone health status**

A default Schedule is prepopulated in all project records, however Project Managers may choose to amend this schedule as they see fit, ensuring the above minimum requirements are met.

A detailed Scheduling guide is available on the [PGO ProTRAC website](https://www.pgo.com/protrac).
At a minimum, the following information should be kept up-to-date within the Schedule page of your
ProTRAC project record –
1. Project end date (if it has changed)
2. % Complete
3. Any milestones and their health (recommended)
## PSR Example

### Project Overview

<table>
<thead>
<tr>
<th>Project ID</th>
<th>PROJ VRT_00162</th>
<th>Phase</th>
<th>4 Execution</th>
</tr>
</thead>
</table>

### Project Performance

#### Key Aspects

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Previous Period</th>
<th>Current Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>G</td>
<td>A</td>
</tr>
<tr>
<td>Budget</td>
<td>G</td>
<td>G</td>
</tr>
<tr>
<td>Scope</td>
<td>R</td>
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<tr>
<td>Risks</td>
<td>G</td>
<td>G</td>
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<tr>
<td>Issues</td>
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<td>Quality</td>
<td>G</td>
<td>G</td>
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<tr>
<td>Resources</td>
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<td>G</td>
</tr>
<tr>
<td>Stakeholder Engagement</td>
<td>G</td>
<td>G</td>
</tr>
<tr>
<td>Change Management</td>
<td>G</td>
<td>G</td>
</tr>
<tr>
<td>Benefits Realisation</td>
<td>G</td>
<td>G</td>
</tr>
</tbody>
</table>

**Commentary on Performance Aspects**

- Delays and resource issues related to COVID-19. Resources have been reallocated elsewhere.

### Financial Overview

<table>
<thead>
<tr>
<th>Source</th>
<th>Original Budget</th>
<th>Current Approved Budget</th>
<th>Estimate at Completion Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life to Date Actuals</td>
<td>$650,000</td>
<td>$650,000</td>
<td>$271,797</td>
</tr>
</tbody>
</table>

### Schedule Overview

- **Forecast End Date:** 31-Dec-21
- **% Complete:** 25%

### Milestones

- 16-Jun-21: Milestone 1
- 15-Aug-21: Milestone 2
- 31-Dec-21: Project Complete

### Project Timeline

- Milestone timeline

---

Previous period status (RAG)

Current status (RAG)

Project Forecast End Date

% Complete

Milestone timeline
Reminders

✓ **Do not update any fields marked Portfolio/PGO Use Only.**

✓ Ensure you complete all fields as appropriate. Reportable fields that are empty will present as blank on PGO reports, resulting in delays.

✓ Ensure you have access to all projects within ProTRAC that you are responsible for managing. If you cannot see a project you are responsible for, email pgo@uq.edu.au immediately.

✓ Pay attention to character limits on some fields.

✓ Ensure updates are kept to key messages, are evidence based and succinct.

✓ Be cautious of copying and pasting from existing documents as can cause rendering issues and requires manual correction.

✓ The PGO take monthly snapshots to support historical reports, so please remove excess data and leave only your recent update.

✓ Align your update with that provided to your Steering Committee.
## 2022 Monthly Reporting Deadlines

<table>
<thead>
<tr>
<th>Reporting Month</th>
<th>Deadline (Working Day 10)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>16 February 2022</td>
</tr>
<tr>
<td>February</td>
<td>14 March 2022</td>
</tr>
<tr>
<td>March</td>
<td>14 April 2022</td>
</tr>
<tr>
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<td>13 May 2022</td>
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<tr>
<td>October</td>
<td>14 November 2022</td>
</tr>
<tr>
<td>November</td>
<td>14 December 2022</td>
</tr>
</tbody>
</table>

*Reporting deadline may differ from 10th working day due to public holiday/s and/or internal University processing times.