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CREATE CHANGE

PM Induction Quick Reference Guide

Status Updates

Project Governance Office

Updated 8 February 2021

Document version

Version	Date	Comments
2.0	11/01/2021	2021 Reporting Dates added
2.1	08/02/2021	Updated January reporting dates

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

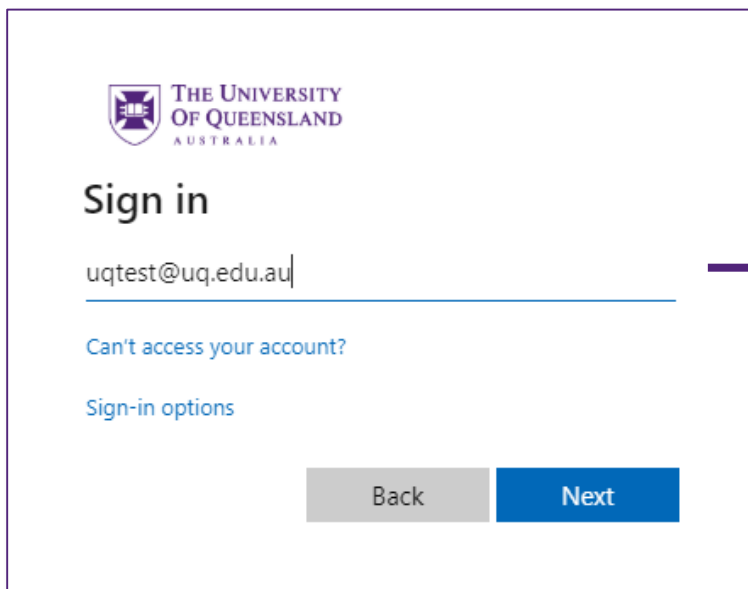
- You know the saying...
- You are accountable for data quality.
- Data quality means... accuracy, completeness, update status, relevance, consistency, reliability, appropriate presentation and tone, and accessibility.

- Key messages, evidence based, succinct



Log into ProTRAC

1. Navigate to <https://uq.sharepoint.com/sites/pwa-coo/>
2. Log in as below –



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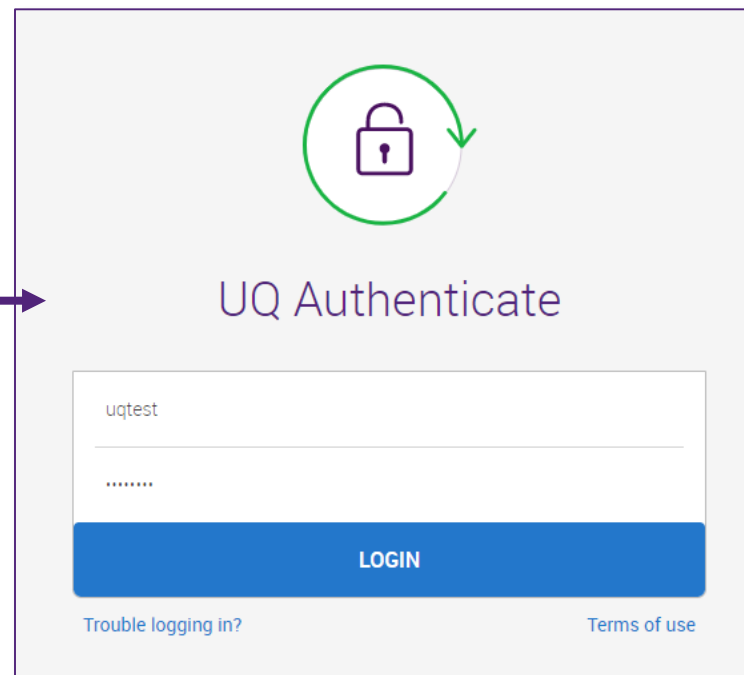
Sign in


uqtest@uq.edu.au

[Can't access your account?](#)

[Sign-in options](#)

Back Next





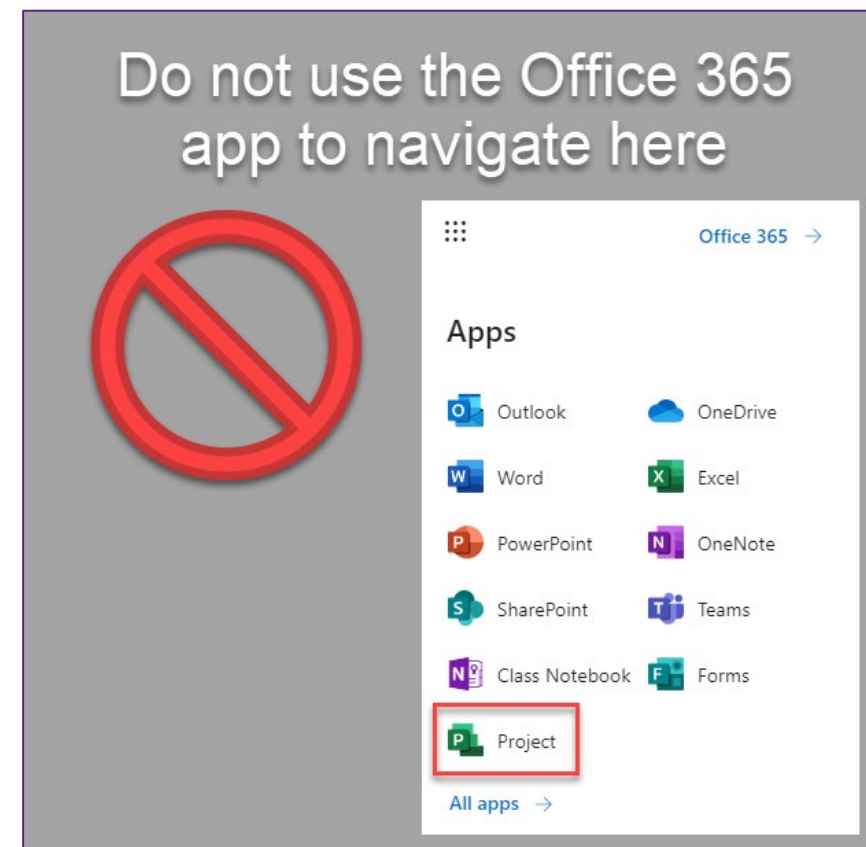
UQ Authenticate

uqtest

.....

LOGIN











[Trouble logging in?](#) [Terms of use](#)



Do not use the Office 365 app to navigate here

Office 365 →

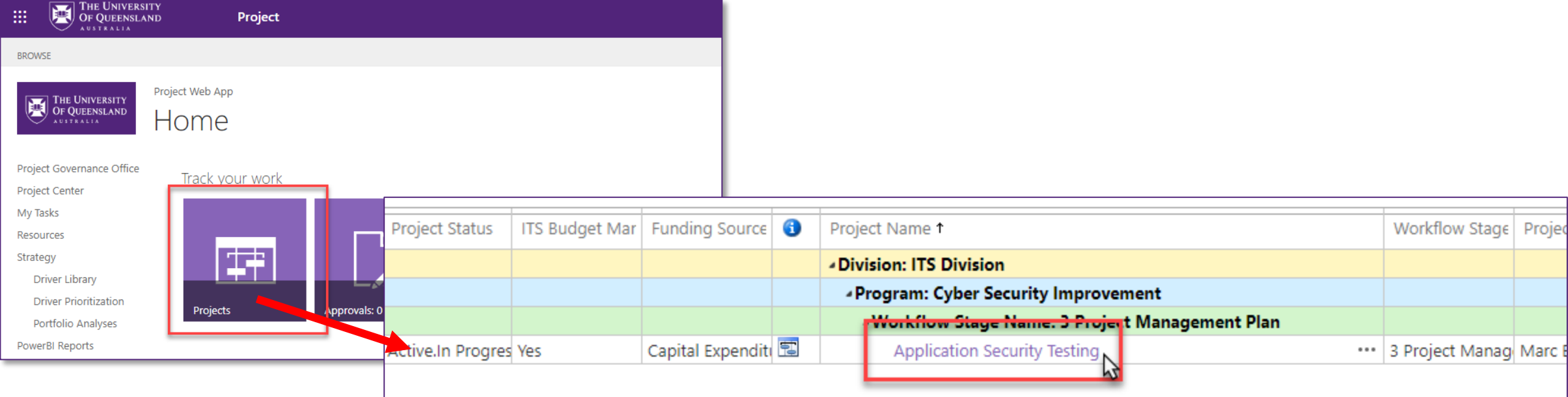
Apps

 Outlook	 OneDrive
 Word	 Excel
 PowerPoint	 OneNote
 SharePoint	 Teams
 Class Notebook	 Forms

Project

All apps →

Locate your project

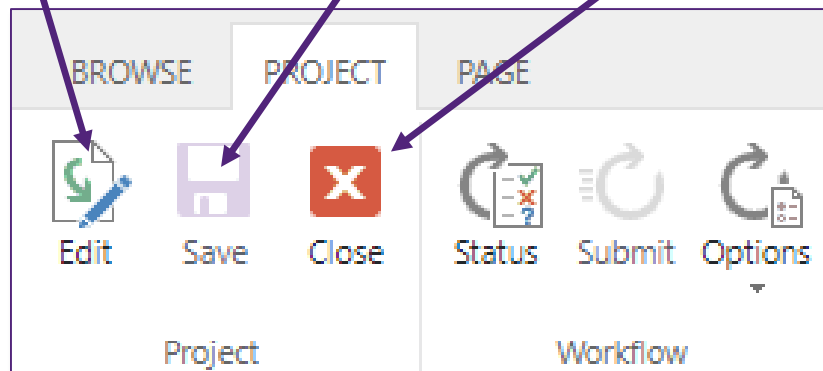


The screenshot shows the Project Web App interface. The left sidebar contains a navigation menu with the following items: Project Governance Office, Project Center, My Tasks, Resources, Strategy, Driver Library, Driver Prioritization, Portfolio Analyses, and PowerBI Reports. The 'Projects' link is highlighted with a red box. A red arrow points from this link to a table of projects. The table has columns for Project Status, ITS Budget Mar, Funding Source, Project Name, Workflow Stage, and Project Manager. The table contains several rows, including a row for 'Application Security Testing' which is highlighted with a red box. The table also shows hierarchical information such as 'Division: ITS Division' and 'Program: Cyber Security Improvement'.

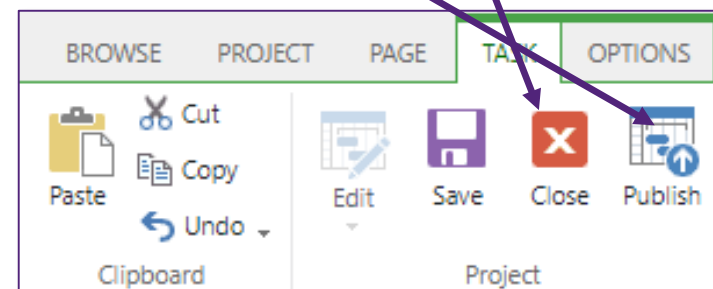
Project Status	ITS Budget Mar	Funding Source	Project Name ↑	Workflow Stage	Project Manager
			Division: ITS Division		
			Program: Cyber Security Improvement		
			Workflow Stage Name: 3 Project Management Plan		
Active.In Progress	Yes	Capital Expenditure	Application Security Testing	...	3 Project Manager

- 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



PROJECT ribbon



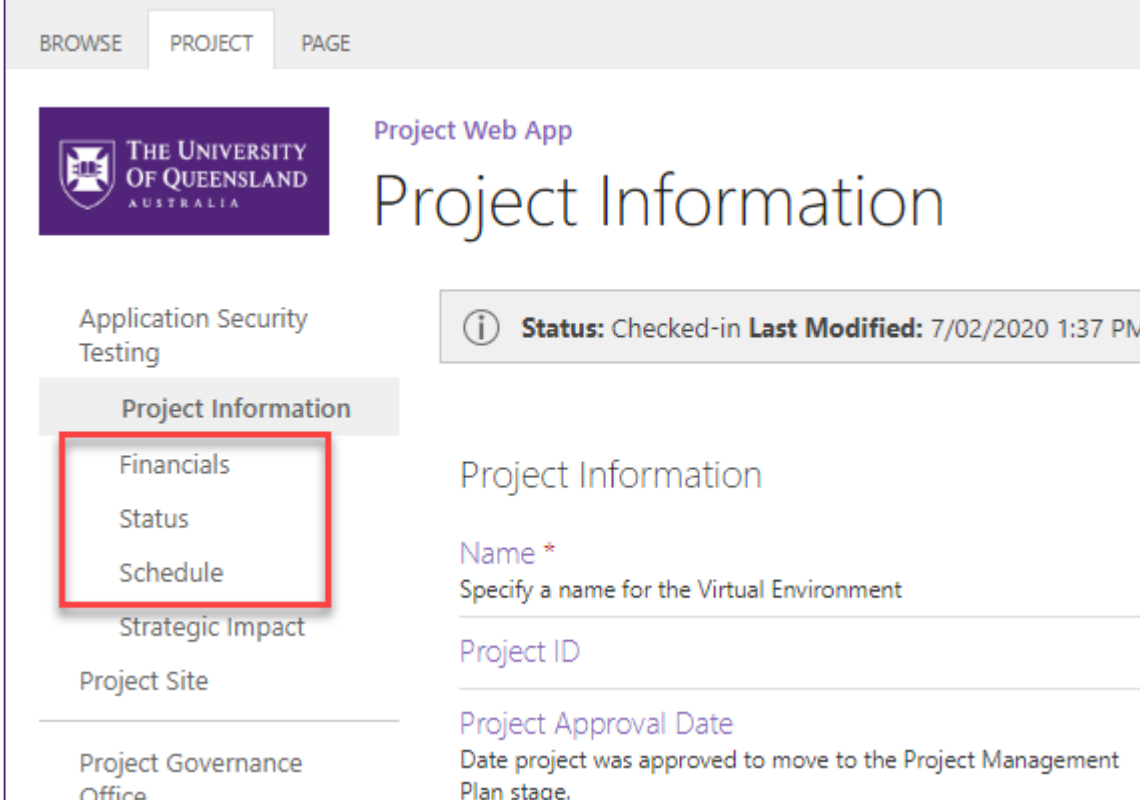
TASK ribbon
(when editing Schedule)



Remember to keep saving your work as often as possible!

Monthly Reporting Requirements Checklist

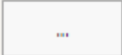
1. Status Update
2. Verification of finances (Financials)
3. Project Schedule
 - a) End Date
 - b) % Complete
 - c) Milestones





The screenshot displays the 'Project Web App' interface. At the top, there are navigation tabs for 'BROWSE', 'PROJECT', and 'PAGE'. The main header includes the University of Queensland logo and the text 'Project Web App' and 'Project Information'. Below the header, there is a status bar indicating 'Status: Checked-in' and 'Last Modified: 7/02/2020 1:37 PM'. A sidebar menu on the left lists various project-related items: 'Application Security Testing', 'Project Information' (highlighted with a red box), 'Financials', 'Status', 'Schedule', 'Strategic Impact', 'Project Site', and 'Project Governance Office'. The main content area on the right shows the 'Project Information' form with fields for 'Name *' (with a subtext 'Specify a name for the Virtual Environment'), 'Project ID', and 'Project Approval Date' (with a subtext 'Date project was approved to move to the Project Management Plan stage.').

<https://governance-risk.uq.edu.au/functions-and-services/project-governance/reporting/monthly-reporting-requirements-checklist>



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

Project Overall Status

Name *	<input type="text" value="Test project"/>
Overall Status Overall performance status of the program/project. (Reportable)	<input type="text" value="Green"/> 
Forecast Finish Date Forecast finish date. (Reportable)	<input type="text" value="27/03/2020 8:00 AM"/> 
Percent Complete Please enter a value between 0 and 100 to represent work complete. (Reportable)	<input type="text" value="95"/>
Performance Commentary Please provide key messages only for your program/project update. Note: Limit 400 characters. (Reportable)	<input type="text" value="Test commentary"/>

Project Performance (Current Status)

Schedule Status Schedule performance indicator. (Reportable)	<input type="text" value="Green"/> 
	<div style="border: 1px solid #ccc; padding: 5px;"><input type="text" value="Search"/> </div> <div style="border: 2px solid red; padding: 5px; margin-top: 5px;"><p>Red - Tolerance Exceeded Amber - Within Tolerance - Requires Attention Green - Within Tolerance</p></div>

Verification of Finances

- Navigate to the project **Financials page**
- Verify your project financials via the PowerBI report embedded at the bottom of the page (login may be required)
- If you are unable to verify the finances (i.e. the figures do not match), contact your local Management Accountant (MA) for assistance. Contact the [Central Finance Advisory team](#) if you do not know who your MA is.

Projects Financial Commentary

Financial Commentary

Financial commentary for future reference.

Ongoing Operational Costs

Please capture the amount, sponsor and other related information.

FINANCIAL OVERVIEW	
Likely Pipeline Cost	
Approved Project Budget	\$396,000
Approved Planned Financial Benefits	
Project Forecast	\$396,000
Year 1	
Year 2	
Year 3	
Beyond Year 3	
Total Project Actuals	\$386,657
Unspent Approved Project Budget	-\$76,657
Total Original Approved FY Budget	\$0
Current FY Approved Budget	\$0
Current FY Forecast	\$0
YTD Actuals	-\$90,000
YTD Unspent Commitments	\$86,000
Current FY Budget Spent %	

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**

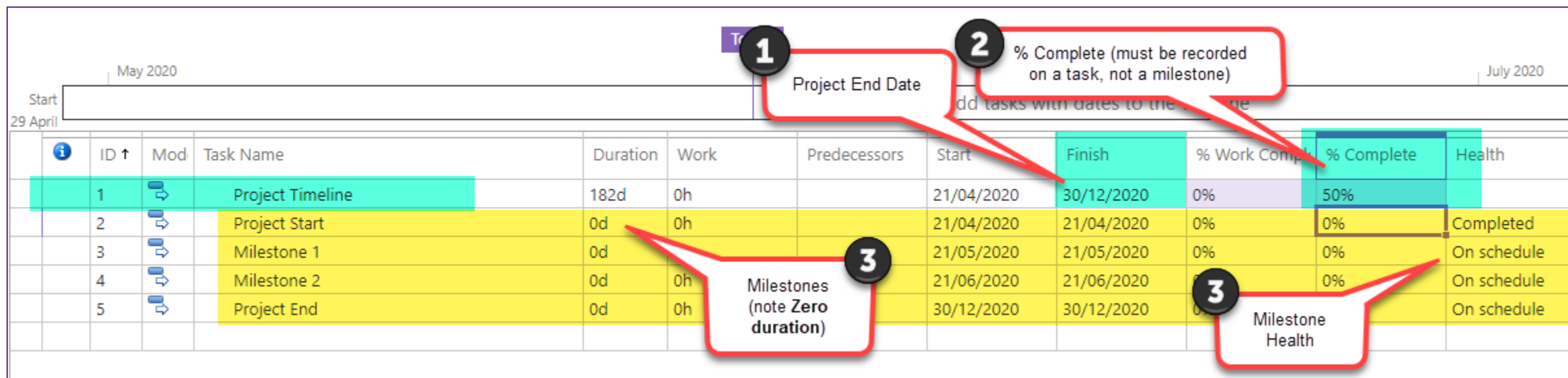
A default Schedule is prepopulated in all project records, however Project Managers may choose to amend this schedule as they see fit, ensuring the above minimum requirements are met.

A detailed Scheduling guide is available on the [PGO ProTRAC website](#).

PGO Minimum Requirements – Monthly Reporting

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)



The screenshot shows a project schedule interface with a table of tasks. Three callouts highlight specific reporting requirements:

- Callout 1:** Points to the 'Project End Date' field in the task details bar, indicating that the project end date must be updated.
- Callout 2:** Points to the '% Complete' column in the task table, noting that this percentage must be recorded on a task, not a milestone.
- Callout 3:** Points to the 'Milestone Health' column in the task table, indicating that milestones should be tracked for their health status.

ID ↑	Mod	Task Name	Duration	Work	Predecessors	Start	Finish	% Work Compl	% Complete	Health
1		Project Timeline	182d	0h		21/04/2020	30/12/2020	0%	50%	
2		Project Start	0d	0h		21/04/2020	21/04/2020	0%	0%	Completed
3		Milestone 1	0d	0h		21/05/2020	21/05/2020	0%	0%	On schedule
4		Milestone 2	0d	0h		21/06/2020	21/06/2020	0%	0%	On schedule
5		Project End	0d	0h		30/12/2020	30/12/2020	0%	0%	On schedule

PSR Example

PROJECT
PGO TEST PROJECT

(Blank) PROGRAM MANAGER | Suresh Chand SPONSOR | [Owner] PROJECT OWNER | [Manager] PROJECT MANAGER

PORTFOLIO
Chief Operating Officer (COO)

PROGRAM
(Blank)

PGO Test UNIFI PROJECT ID | Proj_VRT_00162 PROJECT IDENTIFIER

ASSURANCE PLANNED
(Blank)
Next scheduled date (Blank)

ASSURANCE COMPLETED
(Blank)
Last completed date (Blank)

CURRENT OVERALL STATUS
15/05/2020 20/03/2020 21/04/2020
A A G G
21/04/2020 PROJECT START DATE | 10/07/2020 PROJECT FINISH DATE

PERFORMANCE CRITERIA	15/05/2020	Current	REASON FOR AMBER OR RED IN CURRENT REPORTING PERIOD AND PROPOSED ACTIONS TO GREEN:
Schedule	R	R	Demand and resource issues relating to COVID-19. Resources deployed elsewhere.
Budget	G	G	
Scope	G	G	
Risks	G	G	
Issues	G	G	
Quality	A	A	
Resources	R	R	
Stakeholder Engagement	G	G	
Change Management	G	G	
Benefits Realisation	G	G	

FINANCIAL SNAPSHOT

Pipeline Cost	Original Total Approved Budget (at BC)	Current Total Approved Budget	Total Project Forecast	Total Project Actuals

Current FY Approved Budget	Current FY Forecast	YTD Actuals	Current FY Commitments	Current FY Budget Spent %

PROJECT COMMENTARY

WORK ACCOMPLISHED (This Period)
Closure report in progress.

WORK PLANNED (Next Period)
Review Benefits Realisation.

PGMF Stage	Original Finish Date	Forecast Finish Date	% Completed
4 Execution	18/06/2020	10/07/2020	73

UPCOMING MILESTONES	Forecast Finish Date	Health
Project Start Date	21/04/2020	Not Specified
PMP Milestone (e.g. PMP approved)	21/05/2020	Completed
Execution Milestone 1 (e.g. Testing Program Pass)	20/06/2020	On schedule
Execution Milestone 2 (e.g. Go-Live)	26/06/2020	Blocked
Closure Milestone 1 (e.g. transition to BAU complete)	7/07/2020	Late
Closure Milestone 2 (e.g. Closure Report approved)	8/07/2020	Late
Project End Date	10/07/2020	Not Specified

Previous period status (RAG)

Current status (RAG)

Project end date

Milestones and milestone health status

Project end date

% Complete

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.

2021 Monthly Reporting Deadlines

Reporting Month	Deadline (Working Day 9)	Snapshot Date
January*	19 February 2021	19 February 2021
February	11 March 2021	12 March 2021
March*	14 April 2021	15 April 2021
April*	13 May 2021	14 May 2021
May	11 June 2021	14 June 2021
June	13 July 2021	14 July 2021
July	12 August 2021	13 August 2021
August	13 September 2021	14 September 2021
September	13 October 2021	14 October 2021
October	11 November 2021	12 November 2021
November	13 December 2021	14 December 2021

**Reporting deadline may differ from 9th working day due to public holiday/s.*