PM Induction Quick Reference Guide

Status Updates

Project Governance Office
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 –

Sign in

uqtest@uq.edu.au

Can’t access your account?

Sign-in options

UQ Authenticate

Do not use the Office 365 app to navigate here
Locate your project

- 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

Remember to keep saving your work as often as possible!

TASK ribbon

(when editing Schedule)
Monthly Reporting Requirements Checklist

1. Status Update
2. Verification of finances (Financials)
3. Project Schedule

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

- 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.
Project Schedule

- Navigate to the project Schedule page
- If changes are required, update and publish your schedule

TASK ribbon
(when editing Schedule)
Reminders

✓ 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.
## 2020 Monthly Reporting Deadlines

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<thead>
<tr>
<th>Reporting Month</th>
<th>Deadline</th>
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<tbody>
<tr>
<td>January</td>
<td>14 February 2020</td>
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<tr>
<td>February</td>
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<td>March</td>
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