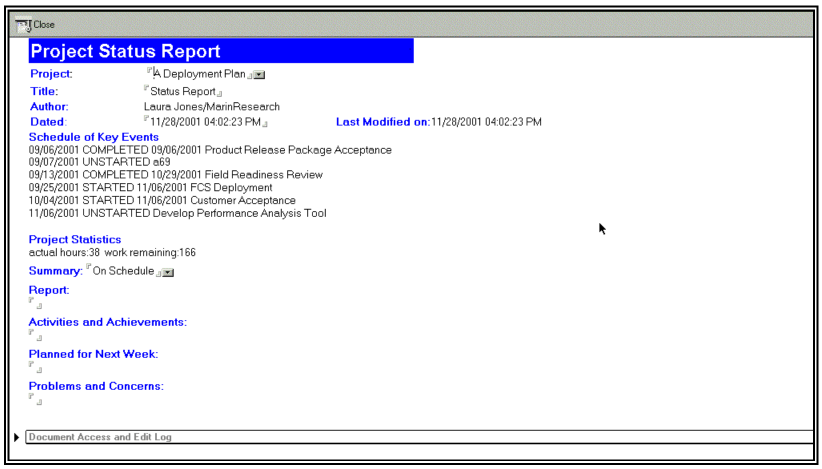
Using Status Reports

Project Status Reports

Creating a Status Report

To create a project status report, click on the Status action button at the top the project profile form.



Notes Project Status Report

Title

This will be defaulted to "Status Report". You may change this to be more specific as needed.

Author

This will be preset with the name of the person composing the report.

Dated

This will be preset with the date that the report is created, but can be changed if the report is for a specific prior period (such as a month end).

Schedule Of Key Events

Note: This is not displayed while editing when using a web browser. It will be shown after the document is submitted and redisplayed.

This is created automatically when the status report is opened and the project is selected.   This shows the current status of each key event in your project.

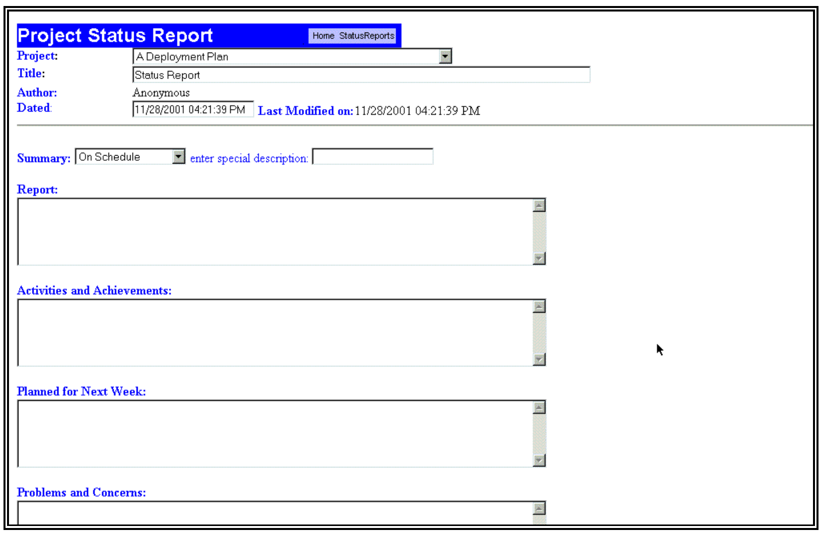
When project name is first set, or changed and the cursor is moved this list is updated.

Open Issues and Risks

This lists up to 20 open issues and risks associated with this project and their due dates.

Project Statistics

This shows the actual hours and work remaining as of the time the report is created. Like the previous item, this is not displayed while editing when using a web browser. It will be shown after the document is submitted and redisplayed.



Web Project Status Report Form, File Attachment and access control items are not shown

Summary

The summary field has a list box of short project status descriptions including "On schedule", "Ahead of schedule", "Slipped but stable". This short description is displayed in the status reports view.

The choices that appear in this list are preset by your system administrator in the Repository Administration form.

Report

This is the primary statement of your situation.

Activities and Achievements

This is a list of what you have done since the last report.

Planned for Next Week

This is a list of your short term objectives. (In some cases this will be for more than a week.)

Problems and Concerns

This is a list of problems that you are facing. Note that, if these are project specific concerns, they should be raised as issues.

Once this document has been saved, it will appear in the status reports view, which is grouped by program and project, then by date of report.

Key Questions

This is a list of diagnostic questions that every project leader should be able to answer. A [Yes/No] selector is provided for each. Next to each is a place to provide a short explanation if answer is No.

Note that this list can be customized for your organization rather easily.

Have the Project objectives changed?

Have the assumptions in the project charter changed?

Has the deliverable scope changed?

Has the cost changed?

Is the project being impacted by external factors?

Are there review and approval problems?

Are there problems affecting the project team's ability to perform the work?

Are there staffing problems?

Participant Status Reports

A Participant Status report is a form used to record the current accomplishments of a person, either in whole, or in the context of a single project.

Participant Status Reports are created using the Status action on the participant profile form, or using the "Create a Participant Status Report" link that appears on the response page of a submitted web timesheet.

When using this form from a web browser, if the document is created by using the links found on either the participant profile or timesheet, then the contents of the "Report", "Activities", and "Problems" fields will be pre loaded from the last such report by that person. The previous "Plan for next week" becomes the "Current "Activities."

The Participant Status Report shows "[Select]" when the form is opened so that the user must select a participant if one was not preselected by the choice of open action links.

Participant Name

Select the participant from the list provided if not preselected.

Title

This will be defaulted to "Status Report". You may change this to be more specific as needed.

Author

This will be preset with the name of the person composing the report.

Dated

This will be preset with the date that the report is created, but can be changed if the report is for a specific prior period (such as a month end).

For Project

If this is a complete report for the participant, then it should be set to ALL. Otherwise, create separate reports for each project and select the project name from the list provided.

Report Body

Report

This is the primary statement of your situation.

Activities and Achievements

This is a list of what you have done since the last report.

Planned for Next Week

This is a list of your short term objectives. (In some cases this will be for more than a week.)

Problems and Concerns

This is a list of problems that you are facing. Note that, if these are project specific concerns, they should be raised as issues.