Dorset Portfolio Management Office

Celoxis

Action Plan

Contents

The Action Plan App

Click to jump to a section

Adding Actions

Updating Actions

Use the 'Home' button to come back here

Recommended Use

Filter by code, actionee/lead, whether it is open and workspace

There is also a report that you can run named *Action Plan Report*. This includes all columns of data that have been input. You can filter on various options

You can go straight to the register where you will see all actions assigned to you

Click on an action name to open it for more details or editing

Items are grouped by workstream and you can make edits from the Action Plan screen where you see the pencil icon

Adding Actions

We enter monthly status updates for PMO projects as this is our reporting period

Click the '+' icon and then select *Action Plan*
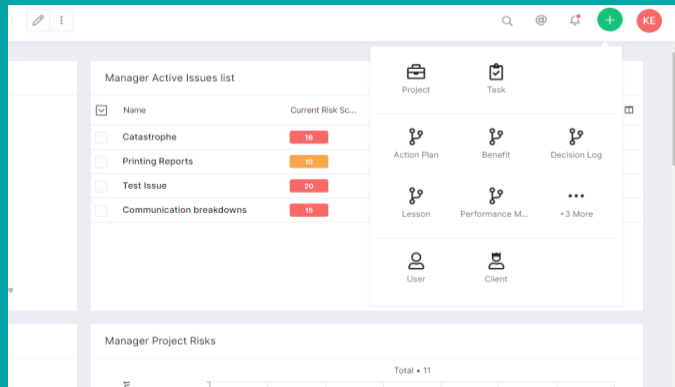
Select the relevant Project or Workspace you want to add to

Add Action Plan to...

○ Recent Project   ○ Select Project...   ○ Workspace

Recent Project *
CYP workplan project

CANCEL   NEXT
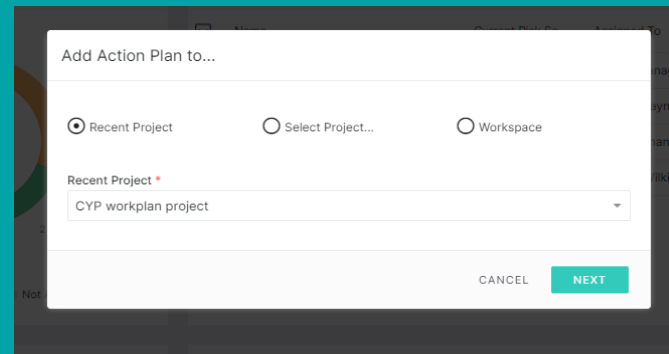
Enter as much information as you need to and press *Save*

Add Action Plan

Name *

Area of activity/workstream

Update/Comments

Comment
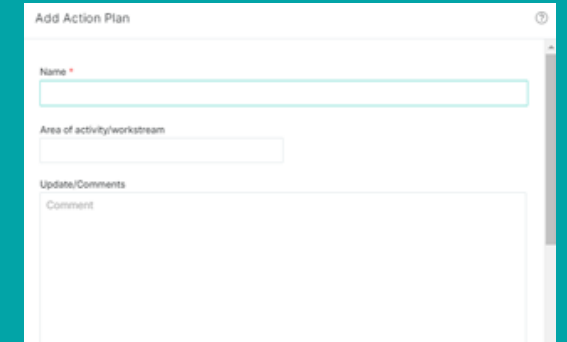
There are only a small number of required fields – Actions can be as detailed as you need them to be

Make quick edits wherever you see the pencil appear on hover

PMO_COMMS | PMO Comms & Engagement pla | HP | On track | 30 Jul 21

- ~~Development of a comms & engagement strategy/plan for the PMO team~~
- ~~Bring to team meeting for peer review / input~~
- Build plan into schedule / comms & engagement calendar spreadsheet

PMO Comms & Engagement plan
PMO

Open Delay

Overview

ID
1275855

Workspace
PMO

Assigned To
Heather Payne

Portfolio

Area of activity/workstream
PMO

Update/Comments

Action Required / Objectives
- ~~Development of a comms & engagement strategy/plan for the PMO team~~
- ~~Bring to team meeting for peer review / input~~
- Build plan into schedule / comms & engagement calendar spreadsheet

Deliverables

Resources Needed
HP

Impact / Outcomes

Potential Risks
Time to complete

Action RAG
On track

Actionee / Lead
HP

Action code

Priority

— WORKFLOW

Open
a month ago

Closed

— RELATED

On track
- ~~Development of a comms & engagement strategy/plan for the PMO team~~
- ~~Bring to team meeting for peer review / input~~
- Build plan into schedule / comms & engagement calendar spreadsheet

B I U S T! ▪ ≡

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Highlight any text to bring up a menu. Use the *Strikethrough* function to show actions have been completed

12/07 -

Click on the action plan *Name* to open the plan in full. You can make edits to all sections here. You can also close the action plan in the top right corner.

It can be confusing having different planning options available,
but Action Plans are optional. We recommend the following:

Project Plan

- Milestones
- High-level or key tasks that enable the project to progress
- Formal document

Action Plan

- Tasks required to achieve key tasks and milestones in the project
- Tasks that sit outside of a project
- Can be used for BAU

To Do List

- Itemised list of actions needed
- Items that sit outside of a project
- Can be used for BAU