

**Dorset Portfolio
Management Office**

Celoxis

Action Plan



Action Plan in Celoxis

Contents

The Action Plan App

Adding Actions

Updating Actions

Recommended Use

Click to jump to a section

Use the 'Home' button to come back here

Area of activity/workstream	Action code	Name	Actioned / Lead	Action RAG	Due Date	Update/Comments
Framework	PMO_FW_SEP21	Sept 2021 - Templates / Framework updates	CC	On track	30 Sep 21	
	PMO_FW_BPV	BPV options template & guidance	KE	On track		Update 29 Revised template forwarded MD Guidance to following to
	PMO_FW_COMM5	Tools/templates - Communications guide	CC	At Risk	30 Sep 21	
PMO	PM_DEV_PLAN	Detailed Planning and Scheduling Pilot	Lead: Marc Corman Actionee: Nick Casey	On track	20 Aug 21	08/07/21 - planned for Activity with Project Plan vaccine in U 08/08/21 - Session had Feedback to schedule for changes to week.
	PMO_CEL_FP	Celoxis forward planning	HP	On track	27 Aug 21	
	PMO_COMM5	PMO Comms & Engagement plan	HP	On track	30 Jul 21	
	PMO_GLOS	Compare/update PM Lite & PMO glossaries	CC	On track	1 Sep 21	
	PM_DEV_Benefits	Benefits Management	NC	On track		
	PM_DEV_LITE	PM Lite - June Cohort	Michelle Wilkins	On track		Delivery of Cohort will 16th July 21

Tools/templates - Communications guide

Overview

ID: 1275856
Workspace: PMO
Assigned To: Cara Cross
Area of activity/workstream: Framework

Action Required / Objectives:

- Allocate resource / time
- Develop content for deliverables
- Peer review
- Launch for Sept framework updates

Deliverables:

- Comms & engagement plan guidance - how to develop/fill in a comms plan template
- Example comms plan
- Guide to Comms & engagement - general techniques / tips / methods of communication etc.

Resources Needed: CC / tba

Impact / Outcomes:

Adding Actions >>>>

The Action Plan App

The screenshot shows the 'Our Dorset' Action Plan app interface. On the left is a navigation menu with options like Dashboard, Projects, Tasks, Workload, Apps, More, and Reports. The main area displays a table of action items grouped by workstream (Week 1 and PMO). A callout points to the filter icons above the table, another to the 'Action Plan' menu item, a third to the 'Celoxis forward planning' action item, and a fourth to the detailed view of that action. A fifth callout points to a report icon in the top right.

Area of activity/workstream	Action code	Name	Actionee / Lead	Action RAG	Due Date	Update/Comments
Week 1	A1	Availability confirmation of presenters/facilitators	Michelle to follow up and notify confirmation to all the team.	Future	14 Aug 21	Confirmation that everyone knows what is expected of them and what they will be covering.
PMO	PM_DEV_PLAN	Detailed Planning and Scheduling Pilot	Lead: Marc Gorman Actionee: Nick Casey	On track	20 Aug	
PMO	PMO_CEL_FP	Celoxis forward planning				
PMO	PMO_BC_WS	Business Case workshops				
PMO	PMO_ProjHealth	Project Health Checks				
PMO	PMO_COMMS	Comms & Engagement				
PMO	PMO_GLOS	Prepare/update PM Lite & I				
PMO	PM_DEV_Benefits	Benefits Management				

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

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

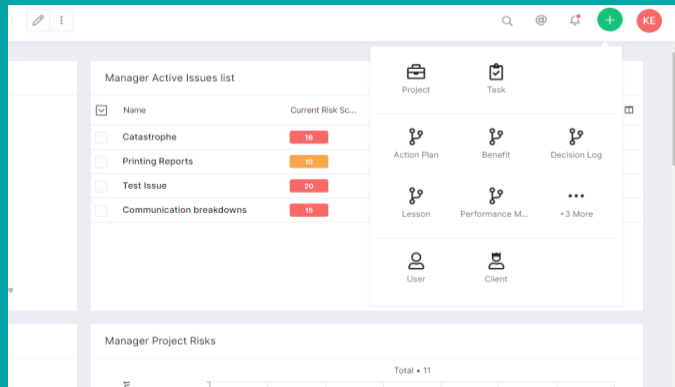
There is also a report that you can run named *Action Plan Report*. This includes all columns of data that have been input. You can filter on various options

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

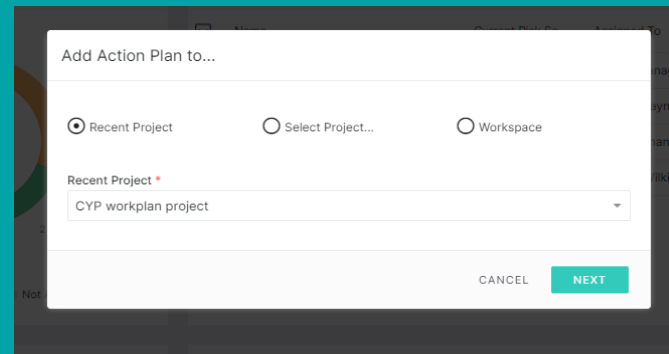
Adding Actions

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

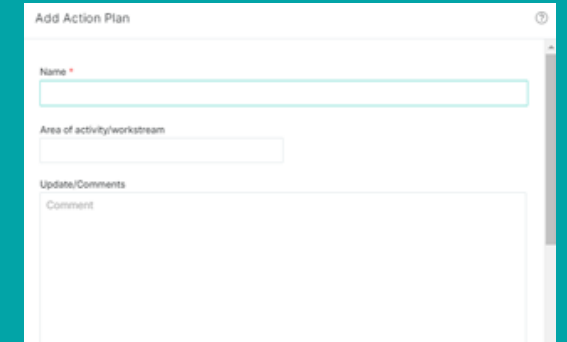
Click the '+' icon and then select *Action Plan*



Select the relevant Project or Workspace you want to add to



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



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

Updating Actions

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

Make quick edits wherever you see the pencil appear on hover

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

12/07 -

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

PMO Comms & Engagement plan

Overview

ID: 1275855

Assigned To: Heather Payne

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

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.

Recommended Use

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