Dorset Portfolio Management Office

Celoxis

Project Updates and Settings

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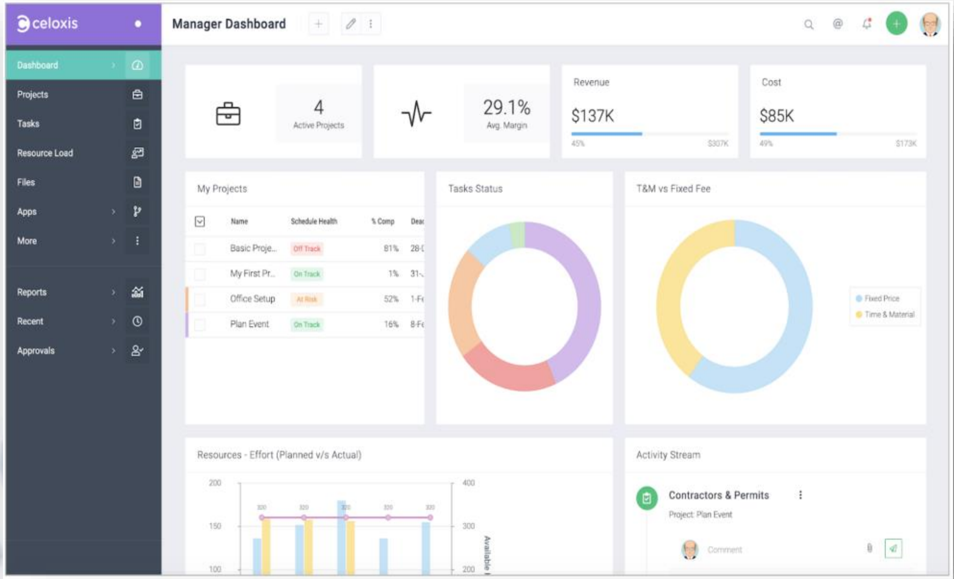
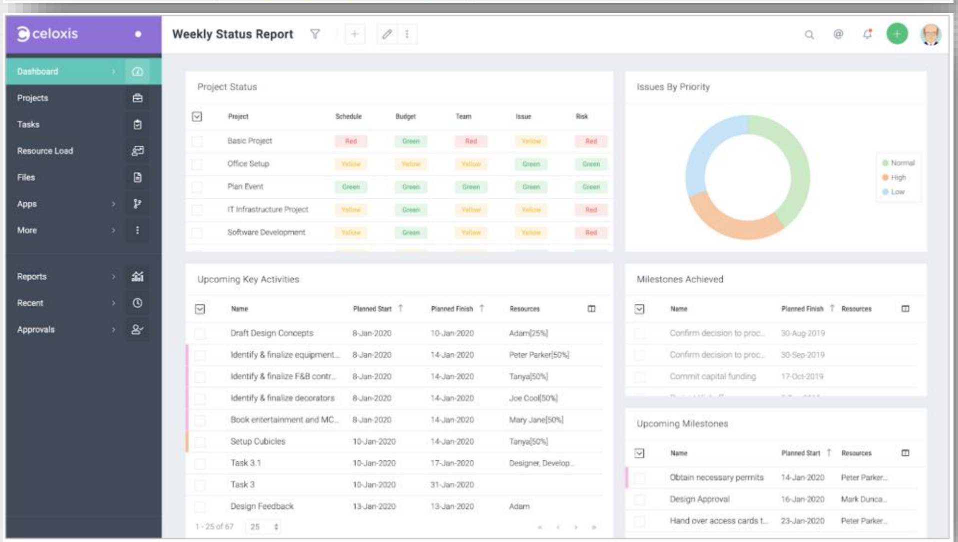


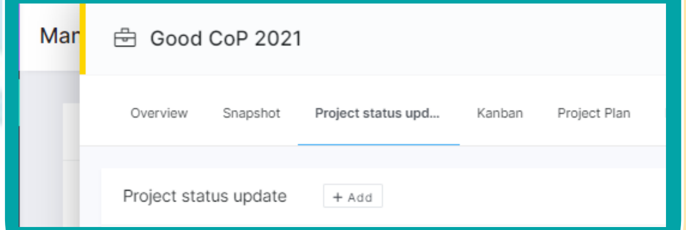


Project Status Updates >>>

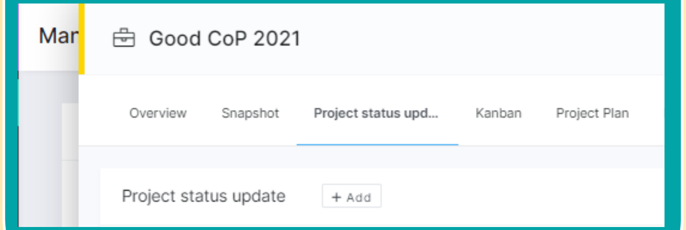
Project Status Updates

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

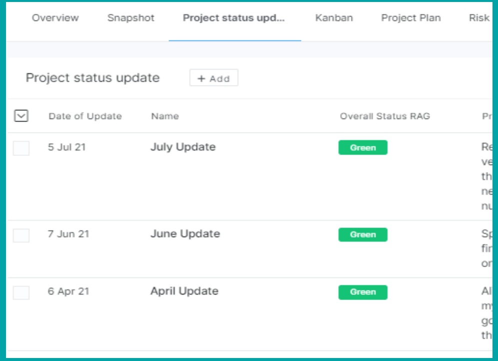
In the project screen, go to the 'Project Status Update' tab in the menu.



Click 'Add' to enter a new update for the reporting period

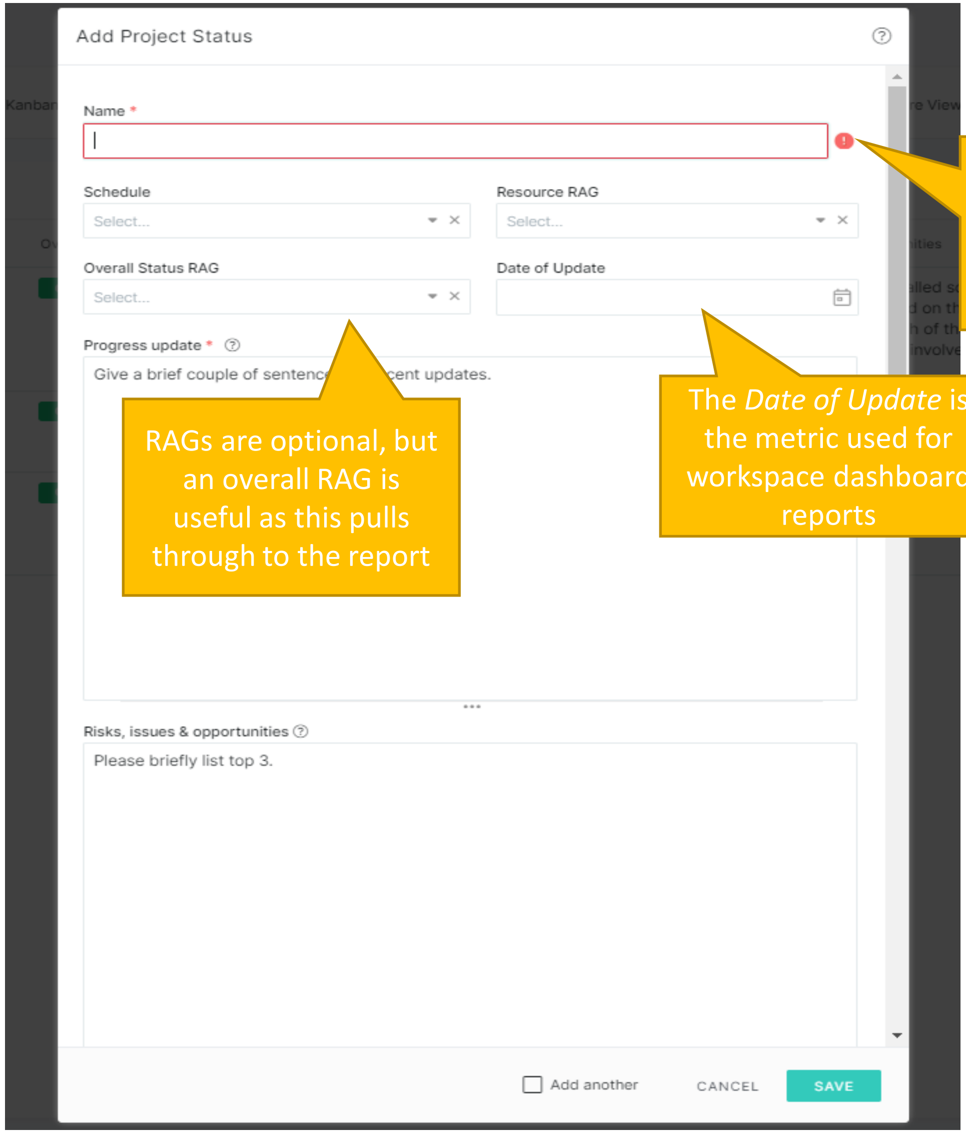


Or click on a previous update to add more information



How you enter updates can be relevant to your own reporting periods and needs

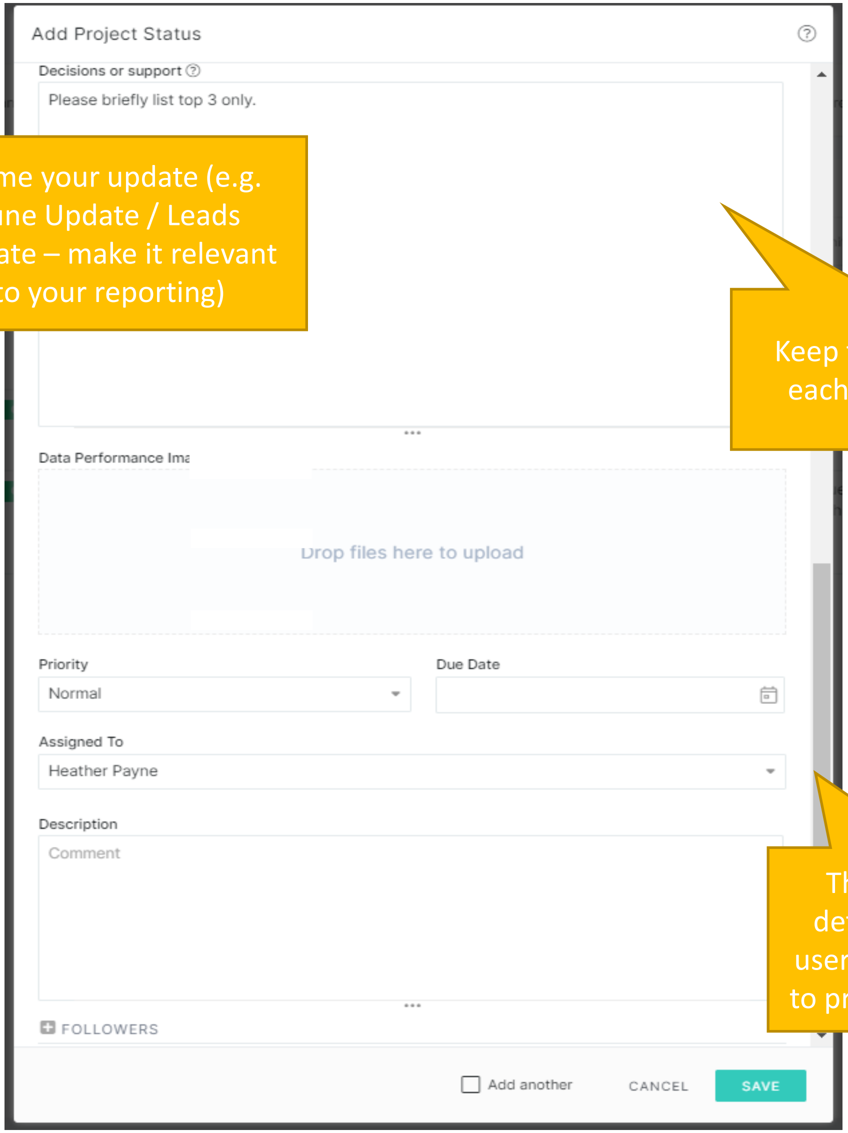
Entering A Status Update



RAGs are optional, but an overall RAG is useful as this pulls through to the report

The *Date of Update* is the metric used for workspace dashboard reports

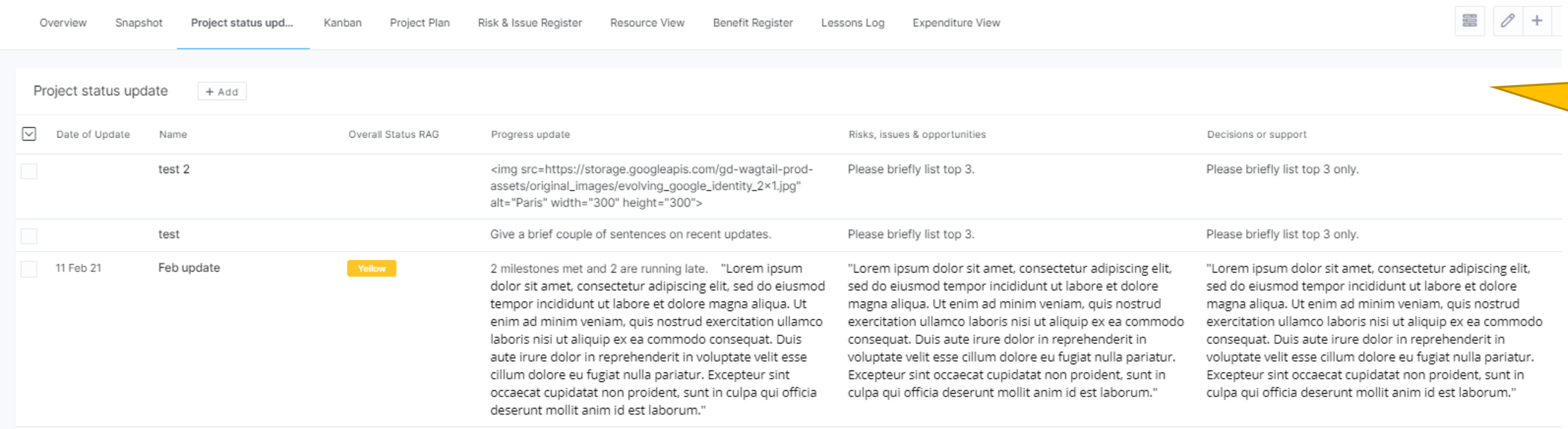
Name your update (e.g. June Update / Leads Update – make it relevant to your reporting)



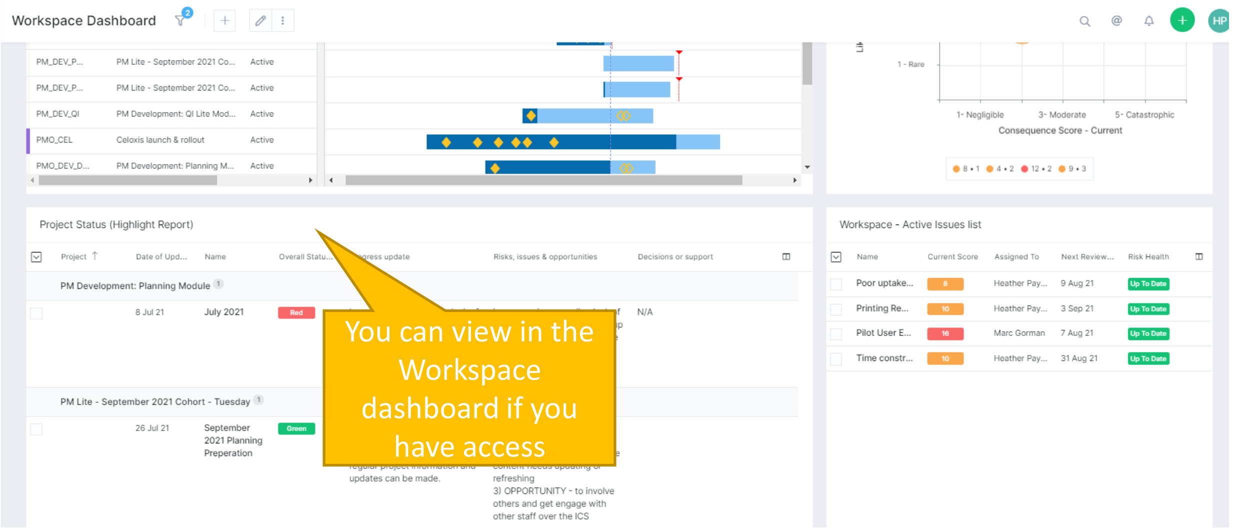
Keep things brief in each of the fields

The *Assigned To* will default to the running user, but can be changed to project team members

Viewing Updates



You can view by opening the project and going to *Project Status Update*

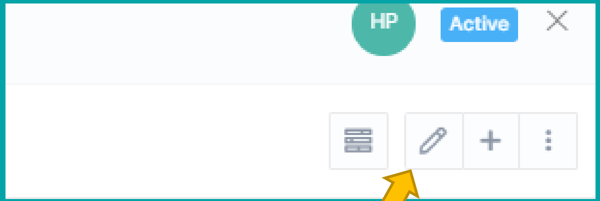


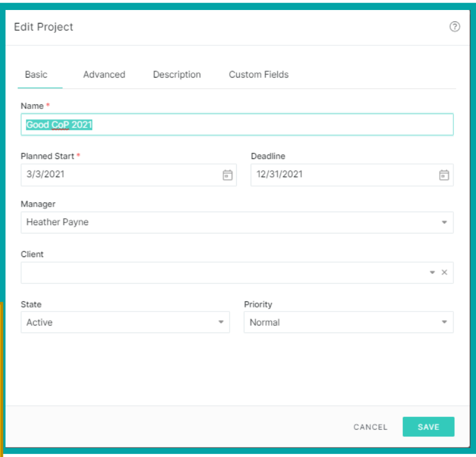
You can view in the Workspace dashboard if you have access

You can also run the *Project Status (Highlight Report)* to view all of your own project status updates. This report cannot be filtered but can be sorted by project or date of update

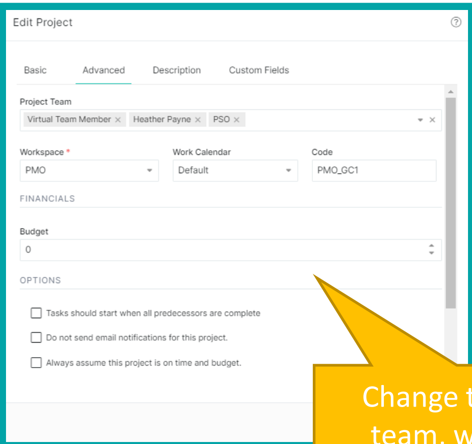
Edit Project Information

Use the *Edit* button in the top right corner of the project screen

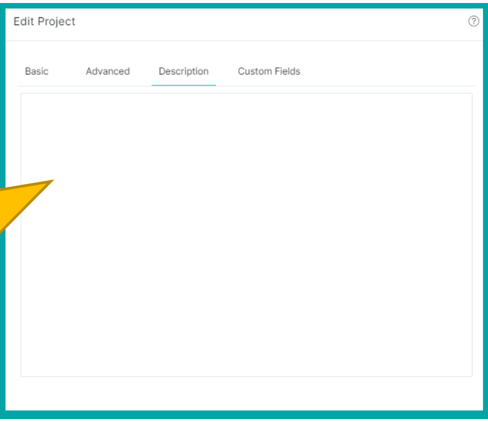




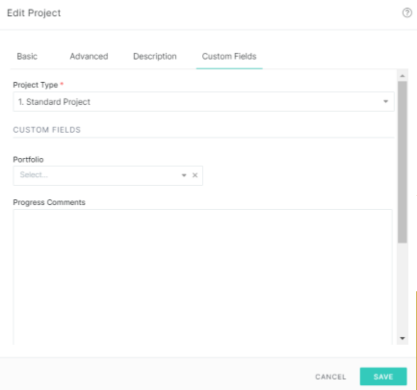
Change the project name, deadline, state and more under the *Basic* tab



Change the project team, workspace, project code and more under the *Advanced* tab



Use the *Description* tab to add your project description, objectives or any other additional information you would like to record



Add your project to a Portfolio and/or Directorate. Please do not change the *Project Type* or add to *Progress Comments*