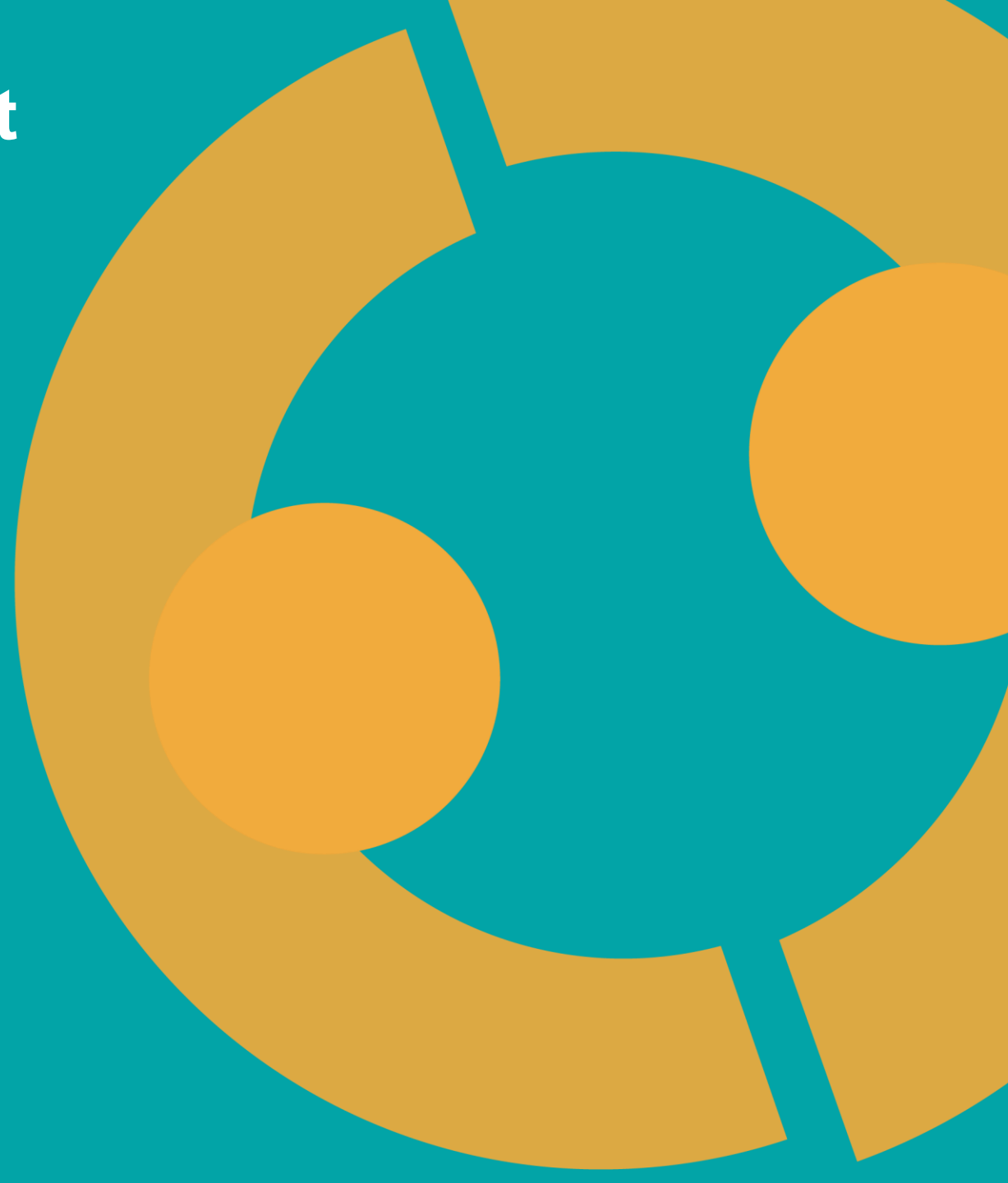


**Dorset Portfolio Management
Office**

Celoxis

**Project Updates and
Settings**



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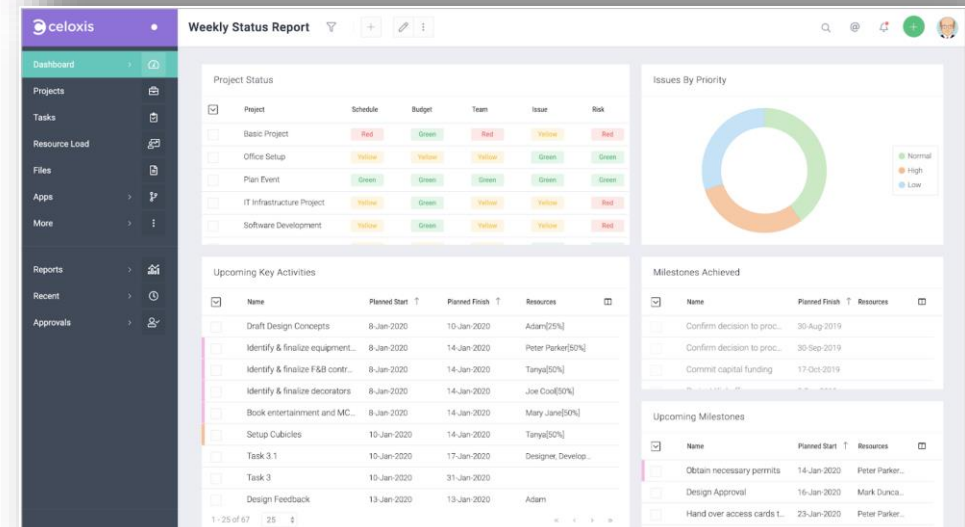
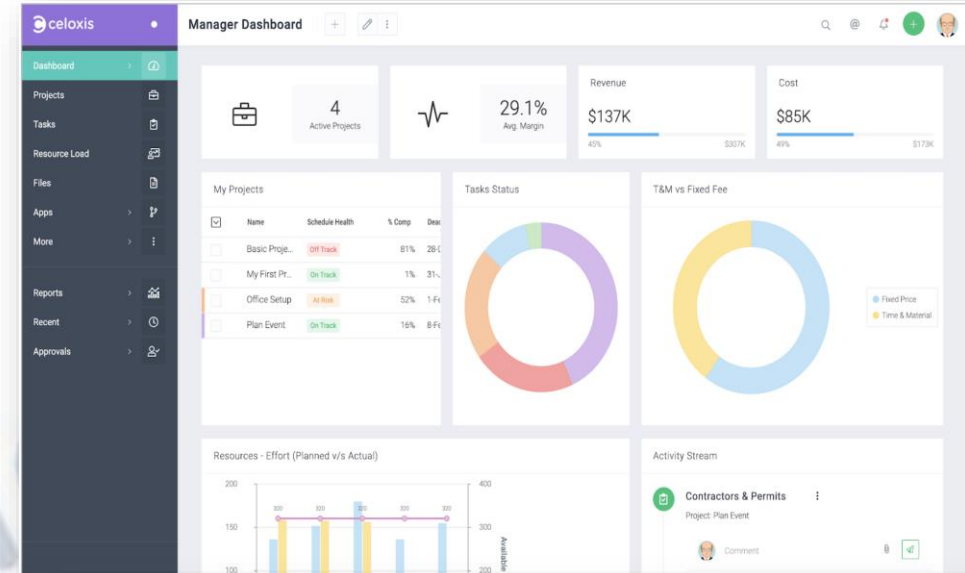
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Project Status Updates

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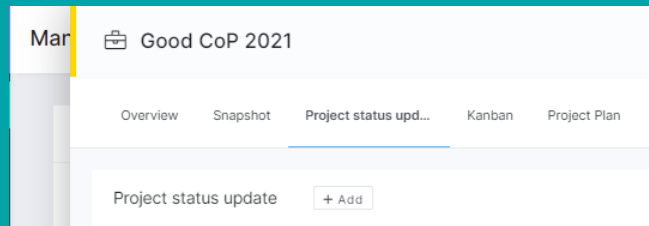


Project Status Updates >>>

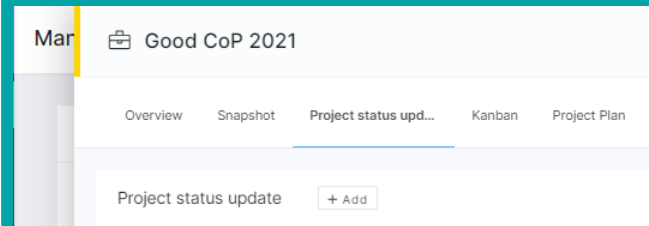
Project Status Updates

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

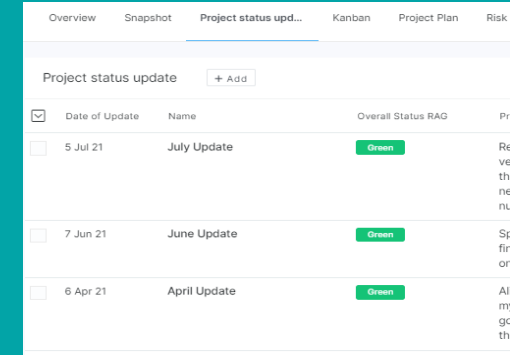
In the project screen, go to the 'Project Status Update' tab in the menu.



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



Or click on a previous update to add more information



A screenshot of the project status update list. It shows a table with columns: 'Date of Update', 'Name', and 'Overall Status RAG'. There are three rows of updates, each with a 'Green' status indicator.

Date of Update	Name	Overall Status RAG
5 Jul 21	July Update	Green
7 Jun 21	June Update	Green
6 Apr 21	April Update	Green

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

Entering A Status Update

Add Project Status

Name *

Schedule

Resource RAG

Overall Status RAG

Date of Update

Progress update * ?

Risks, issues & opportunities ?

Buttons: Add another, CANCEL, SAVE

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)

Add Project Status

Decisions or support ?

Data Performance Im

Priority

Due Date

Assigned To

Description

Buttons: Add another, CANCEL, SAVE

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

Overview Snapshot **Project status upd...** Kanban Project Plan Risk & Issue Register Resource View Benefit Register Lessons Log Expenditure View

Project status update + Add

<input checked="" type="checkbox"/>	Date of Update	Name	Overall Status RAG	Progress update	Risks, issues & opportunities	Decisions or support
<input type="checkbox"/>		test 2			Please briefly list top 3.	Please briefly list top 3 only.
<input type="checkbox"/>		test		Give a brief couple of sentences on recent updates.	Please briefly list top 3.	Please briefly list top 3 only.
<input type="checkbox"/>	11 Feb 21	Feb update	Yellow	2 milestones met and 2 are running late. "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."	"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."	"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

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

Workspace Dashboard

Project Status (Highlight Report)

<input checked="" type="checkbox"/>	Project	Date of Upd...	Name	Overall Sta...	Progress update	Risks, issues & opportunities	Decisions or support
<input type="checkbox"/>	PM Development: Planning Module	8 Jul 21	July 2021	Red			N/A
<input type="checkbox"/>	PM Lite - September 2021 Cohort - Tuesday	26 Jul 21	September 2021 Planning Preparation	Green			

Workspace - Active Issues list

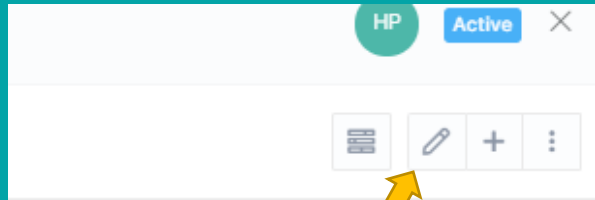
<input checked="" type="checkbox"/>	Name	Current Score	Assigned To	Next Review...	Risk Health
<input type="checkbox"/>	Poor uptake...	3	Heather Pay...	9 Aug 21	Up To Date
<input type="checkbox"/>	Printing Re...	10	Heather Pay...	3 Sep 21	Up To Date
<input type="checkbox"/>	Pilot User E...	10	Marc Gorman	7 Aug 21	Up To Date
<input type="checkbox"/>	Time constr...	10	Heather Pay...	31 Aug 21	Up To Date

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

A screenshot of the 'Edit Project' form, Basic tab. The form has four tabs: Basic, Advanced, Description, and Custom Fields. The Basic tab is active. Fields include: Name (Good COP 2021), Planned Start (3/3/2021), Deadline (12/31/2021), Manager (Heather Payne), Client, State (Active), and Priority (Normal). There are CANCEL and SAVE buttons at the bottom.

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

A screenshot of the 'Edit Project' form, Advanced tab. Fields include: Project Team (Virtual Team Member x Heather Payne x PSO x), Workspace (PMO), Work Calendar (Default), Code (PMO_GC1), Budget (0), and OPTIONS (checkboxes for task dependencies, email notifications, and on-time/budget assumptions). There are CANCEL and SAVE buttons at the bottom.

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

A screenshot of the 'Edit Project' form, Description tab. The Description tab is active, and the main area is a large empty text box for entering project details. There are CANCEL and SAVE buttons at the bottom.

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

A screenshot of the 'Edit Project' form, Custom Fields tab. Fields include: Project Type (1. Standard Project), Portfolio (Select...), and Progress Comments (a large text area). There are CANCEL and SAVE buttons at the bottom.