Dorset Portfolio Management Office

Celoxis

Risks and Issues

Risks and Issues in Celoxis

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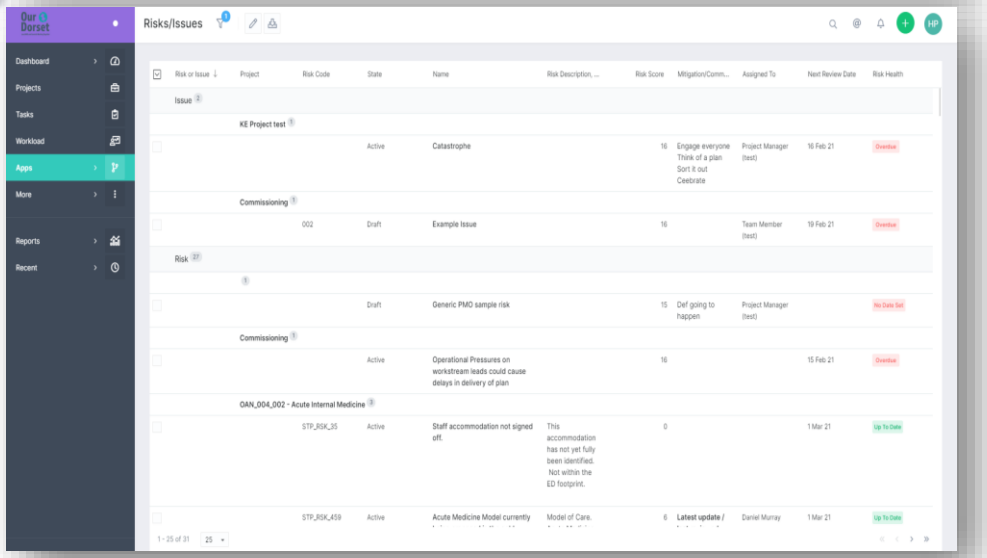
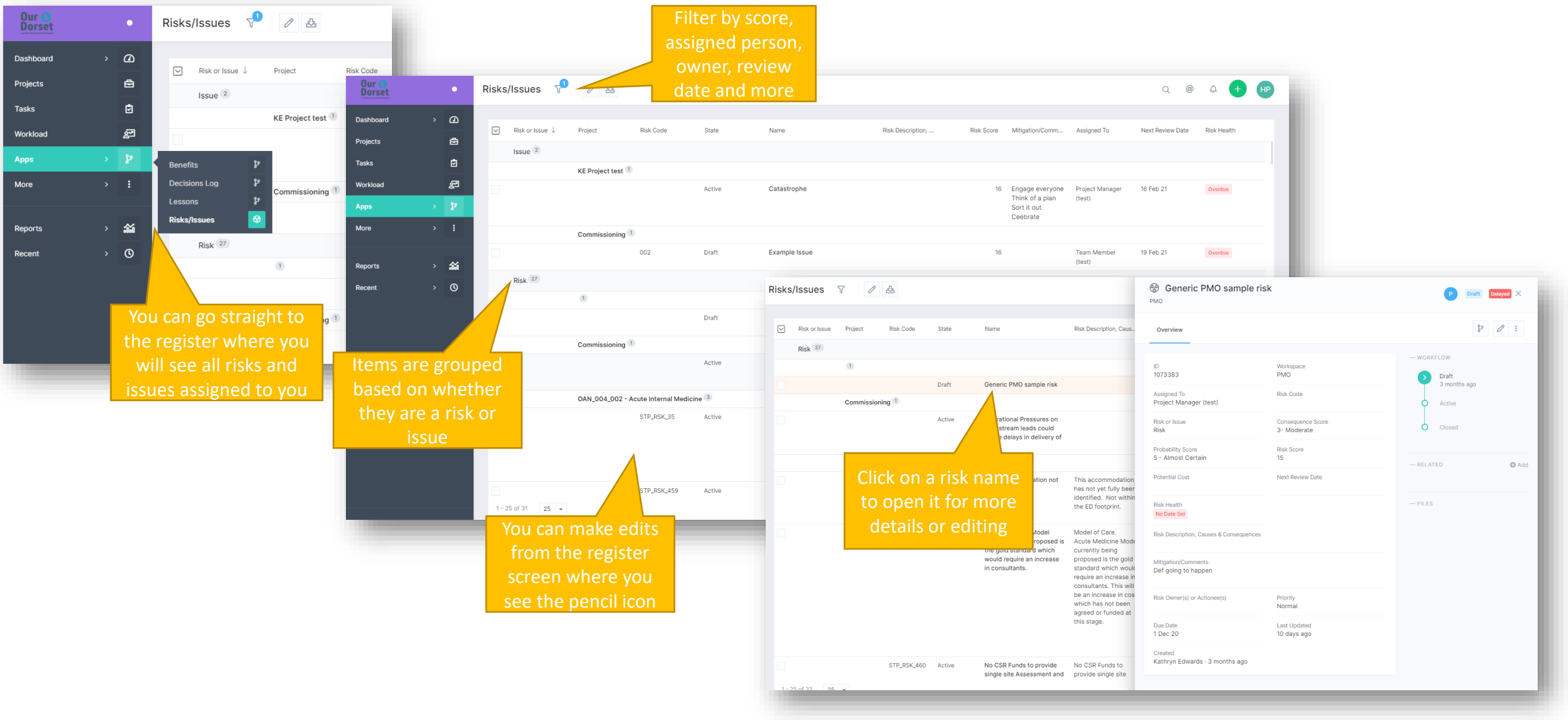
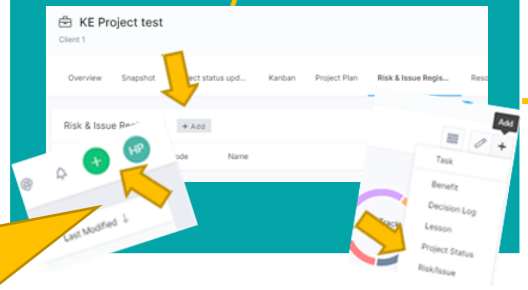


The Risk and Issue Register



Adding Risks and Issues

3 ways to add:



Use the green 'Add' button on the home screens, the 'Add' button in the project screen, or the 'Add' button in the Risk & Issue Register tab

Name:

The system limits this to 120 characters so please shorten the risk titles to summarise into this shorter format (remaining info can go into the next field)

Risk Description, Causes & Consequences:

Describe the risk (what might normally have gone into the risk title) and add causes / consequences

The system has a very good audit trail history so all previous/over typed comments are saved and can be retrieved quite easily.

Mitigation/ Comments:

Add planned actions into here and then latest updates and comments. Each time you add a new update you can overtype the last reviewed comment with the new comment so that you don't end up with reams of comments

See suggested format here

Risk Owner/ Actionee:

There is an additional free text field for you to add executives/non system users as Risks Owners or Actionees. The risk assignee column remains in place and will need to be completed regardless of whether there is an additional risk owner

The default value for this is the project manager who will be assumed as the risk owner unless additional text is added to the Risk Owner/Actionee column

Priority / Due Date:

Optional / leave blank – these fields will not be reported on

Assigned to:

The default assignee/risk owner/actionee if no external person is identified in the free text field

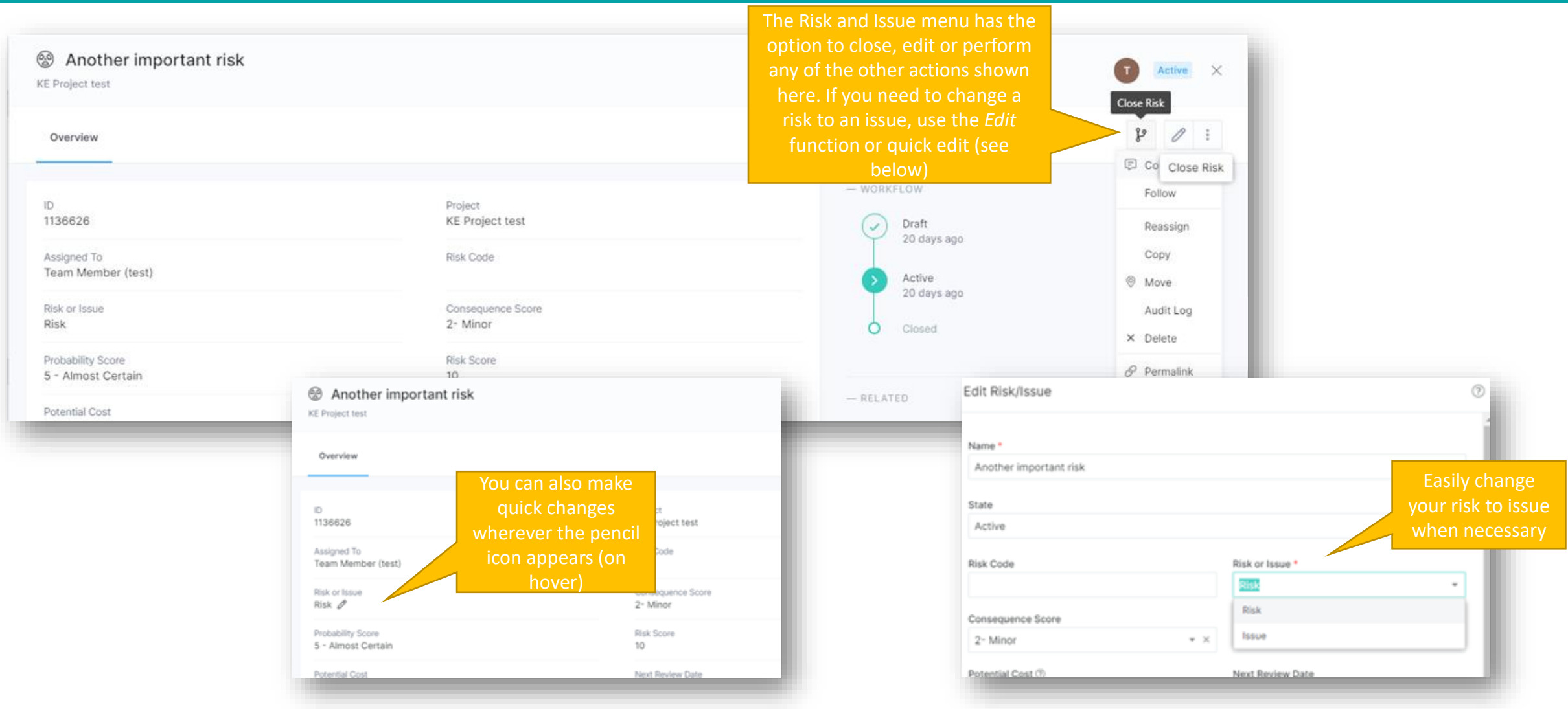
Description:

PLEASE LEAVE BLANK and use the Risk Description, Causes & Consequences field – this field will not be reported on

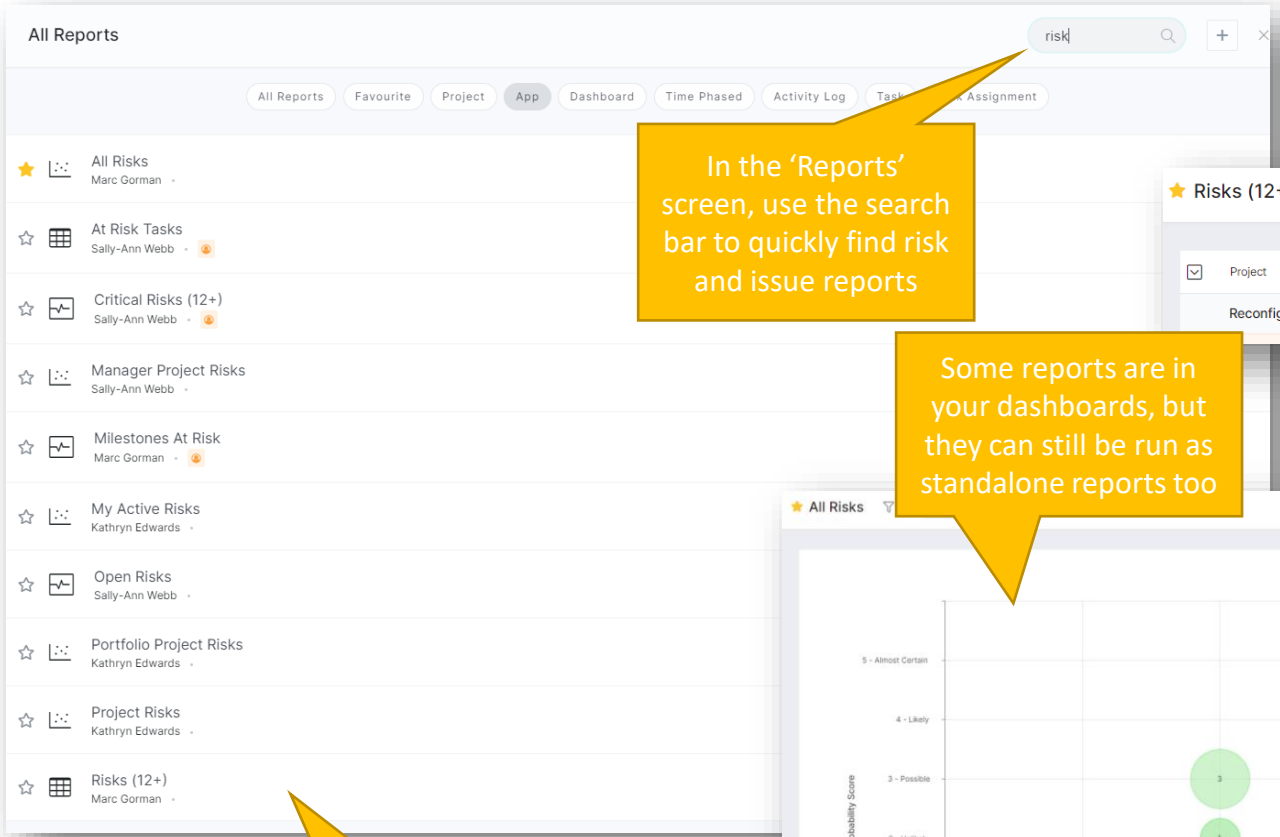
Remember to 'Activate' your risk or issue to make it live.

Risk and Issue Workflow >>>

Risk and Issue Workflow

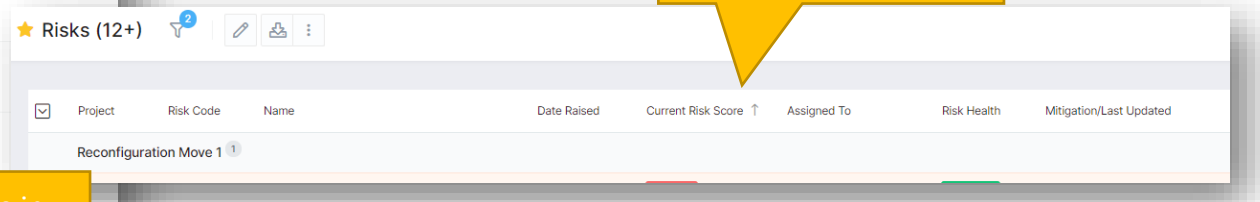


Risk & Issue Reports



In the 'Reports' screen, use the search bar to quickly find risk and issue reports

You can adjust column widths to show the information in a more user-friendly format



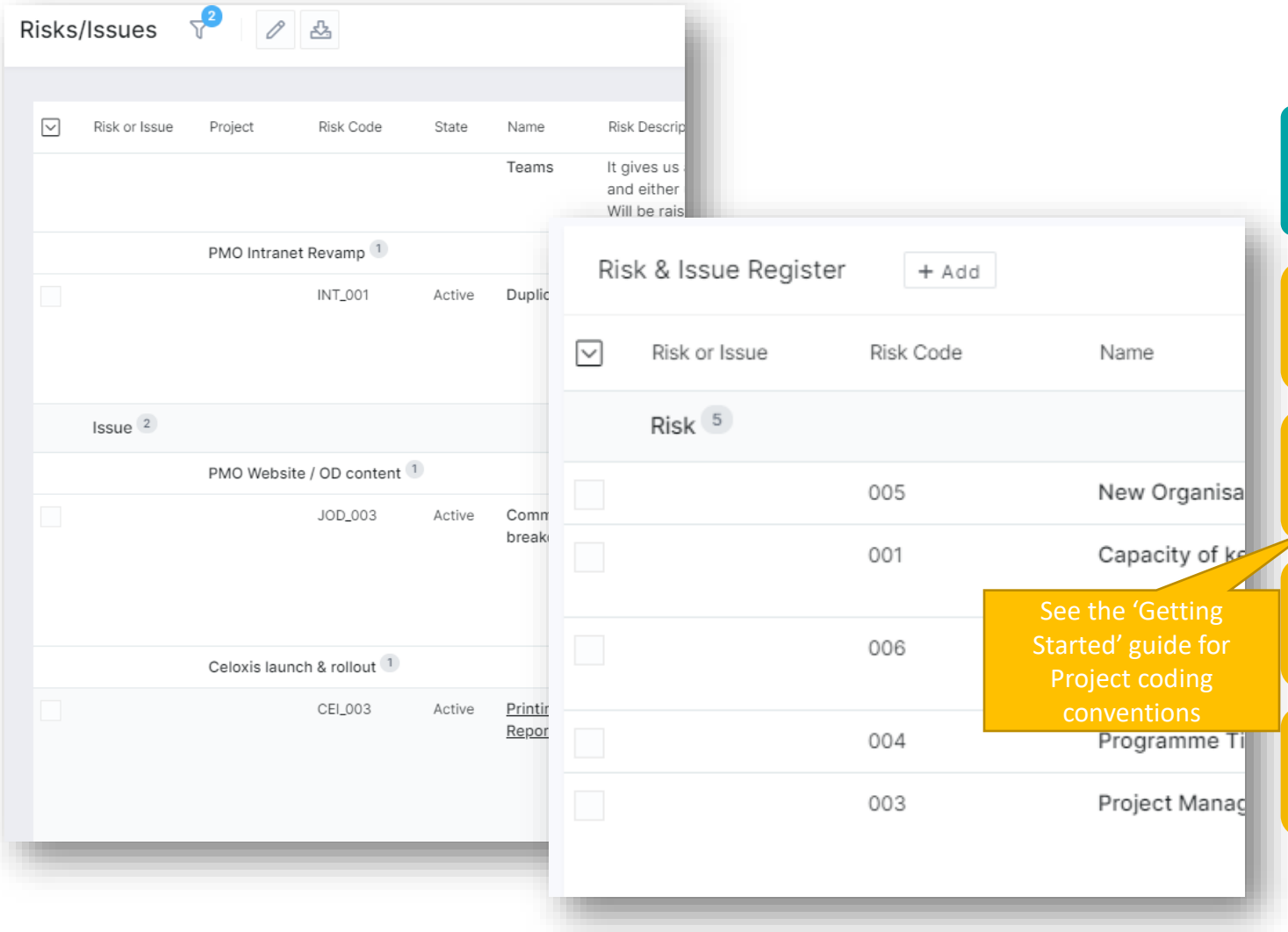
Some reports are in your dashboards, but they can still be run as standalone reports too

Remember, you can star or 'favourite' reports which you will use most often

All reports can be printed to PDF, HTML or Image formats. You can also print your Risk & Issue Register from within projects

Risk Codes >>>

Risk Codes



See the 'Getting Started' guide for Project coding conventions

Coding Conventions

- Keep it short and simple
- If using letters, use letters related to the project code
- Use numbers in a sequential pattern, for example 01, 02, 03 or 001, 002, 003
- You can combine letters and numbers or simply use numbers

FAQs and Appendix >>>

FAQs and Appendix

Why is nothing showing on my reports or dashboards?

- Look for the filter icon and ensure you only have necessary filters on, otherwise click 'Clear' to see all available results

Why are my project health indicators not showing?

- Check that your project state is 'Active'. Health indicators do not show in 'Draft' state

I made some changes but my status calculations have not changed.

- Click the 'Recalculate Projections' button in the project screens to update status

Do I need to follow the exact process for adding risks and issues?

- Yes, to ensure the relevant information can be reported on and maintain consistency across the system

Is there more training available for myself or my team?

- Contact the PMO to discuss your training and user needs, or alternatively join our Teams channel where we post all our updates

Risk/ Issue suggesting mitigation format:

Mitigation/Comments

Last Reviewed - 06/08/20: Start was delayed due to Covid. Impacted by loss of beds due to CCU space being given over to ITU. 8 week pilot currently in progress to assess impact.

Planned Actions: To discuss the change in pathway with the clinical site team and ensure that a SOP is produced and agreed with the operational delivery team at RBH.