

InPhase PMO

User Guide

Contents

Introduction	3
How to get around the Portal.....	3
Four areas of PMO.....	4
Go to My InPhase	5
Go to Reports.....	5
Details & Performance Analysis	5
Setting up a new project	7
Drafting the Project Initiation Document (PID).....	7
Building your Gantt.....	9
Project Finances.....	9
Benefits Score	10
Project Risks, Mitigating Actions	10
Project Update Narrative and Discussion.....	11
Submitting Project for approval	11
Revising if not approved.....	11
Approving a draft project	12
Updating an ‘Approved’ Project	13
Costings	13
Baseline	14
Project Quality.....	14
Project Gantt, Project Risks, Mitigating Actions, Benefits Score, Project Discussion	14
Project Issues.....	14
Cost Benefit Analysis	15
Using My InPhase	16
Updating within My InPhase	16
Projects Highlights.....	17
Managing your Programmes	18
Navigation and Sub-pages.....	18
PMO	19
Sub Pages.....	20
PMO Costs	20
PMO Risks	21
PMO Issues	21
Programme Status	23
Deactivated Projects.....	23
Using Reports for Organisation Unit Reporting	24
Report Description.....	24

Introduction

INPHASE PMO has been crafted to help your team improve project impact, increase benefits and reduce costs.

It gives you a single online portal to plan and approve projects, update, discuss and review them, re-plan where necessary, and improve the benefits forecast and achieved.

For team members, there is easy, real-time access to who else is planned to do, is progressing with or has completed certain tasks that impact on you. Your own task responsibilities come directly to your personal action list. You will be immediately notified of any changes made to the project plan or your own responsibilities. If you work on multiple projects, plans are collated personally so you can work out how you fit in everything you are accountable for this week, next week and every week.

For project managers, there is less time wasted chasing team members for updates, as every team member's update is available to you in real-time, without any re-entering. You can see what every team member knows is expected of them, and when. Reports are automatically generated, freeing your time to review challenges and impacts, discuss options on-line and set additional or adjusted tasks and deadlines.

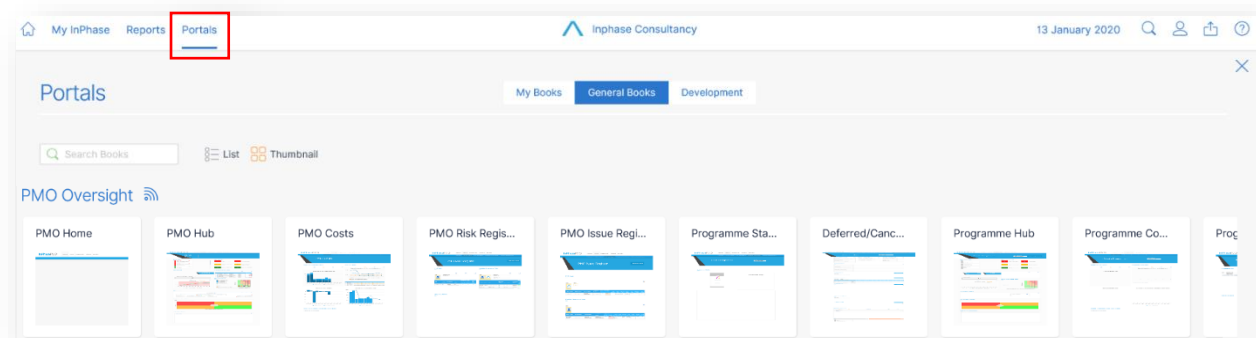
For Service Managers, the resources and cash costs, planned and achieved benefits of each project is always available to you, enabling real-time adjustments to improve impacts to your service.

For Directors, the assurance that each project underway is visible and the costs and benefits are apparent and being maximised. Accountability and progress governance is better than ever before, providing value for money assurance and improving agility to re-deploy focus and resource to changed priorities faster, delivering better organisation outcomes.

How to get around the Portal

Access the PMO from your PC, laptop or smart phone in your browser by logging in to your INPHASE website and selecting the PMO Oversight portal.

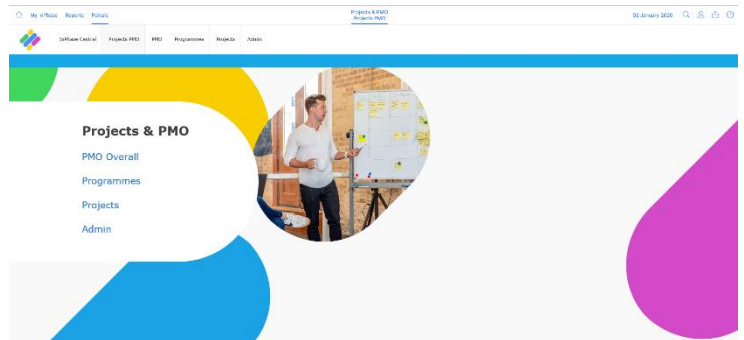
You can access the PMO portal Home page or go directly to any page by using the thumbnails or list in the Portals area, where you can search for a Portal by name and subscribe a specific portal to your My Books shortcuts.



Four areas of PMO

PMO App portal has four areas:

1. **PMO Overall** – all programmes
2. **Programmes** – for each programme
3. **Projects** – for each project
4. **Admin** – for administration.

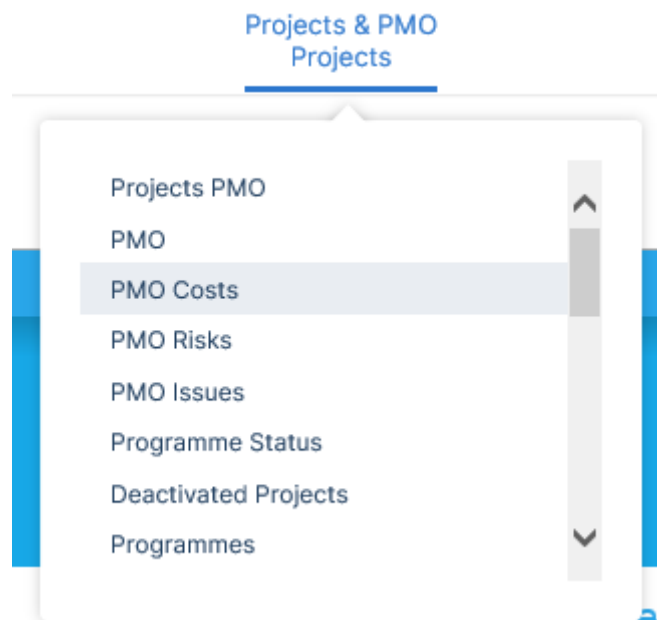


Just like any web site, use the menus at the top of the page to navigate through the PMO. Each area has sub-pages.

The Projects area has the most sub-pages, for drafting, approval, update, risks, issues, highlights and closure for each project.



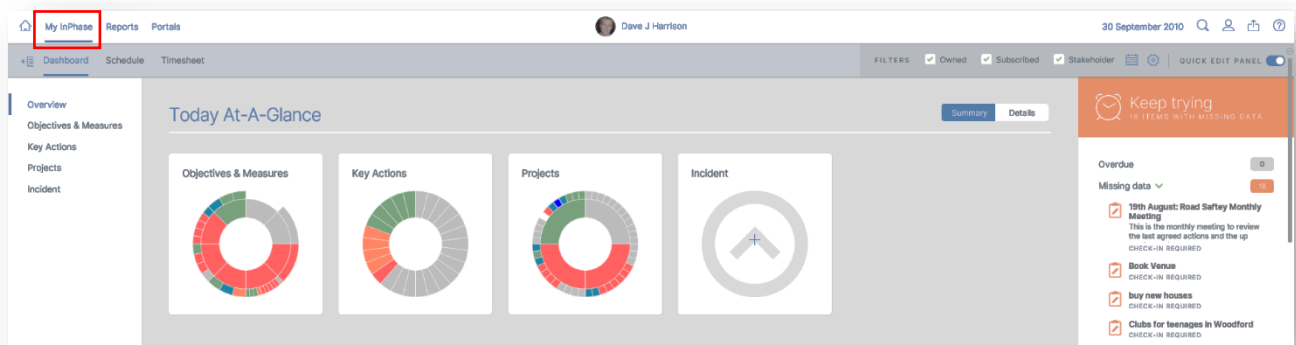
You can also navigate your way through the PMO using the drop-down page title at the top of the page.



Go to My InPhase

Use the top left menu to go to the My InPhase area where each user gets a personalised portal that brings together everything they personally need.

See separate Section 'Using My InPhase' (page 13) for details on what you can do from within My InPhase, including updating your Actions progress, your Projects measures, discussing how to improve results and actions to change and even creating new Actions.

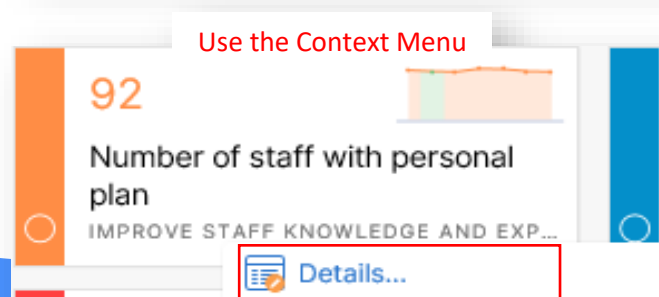
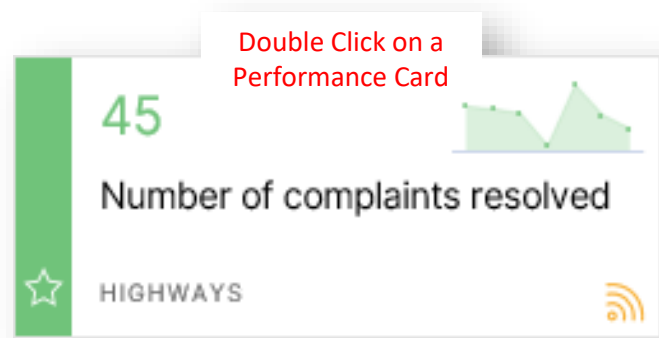










Go to Reports

Use the top left menu to go to the Standard Reports area where you can access the standard Reports for Projects, Actions, Issues and Risks for each Org. Unit. See Separate section on 'Using Reports' (page 14) for details on how to make best use of the standard Reports for each Org Unit.

Details & Performance Analysis

On any INPHASE Page, including PMO portal pages, and within My InPhase, and in Reports, as well as your own custom pages, you can access the Details and Performance Analysis pop-up from a Table cell, chart, performance card, sunburst or causal map by double-clicking or using the context menu (right click on the menu in Windows, or press and hold on touch devices like iPhone and iPad).



Activity	Details	Add Sub-Task	Owner	Update	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20
<input checked="" type="checkbox"/> Project Activity 1			Inphase Consultancy								
<input checked="" type="checkbox"/> Test Activity			Inphase Consultancy								



Double Click on a Table

YTD v Full FY Budget

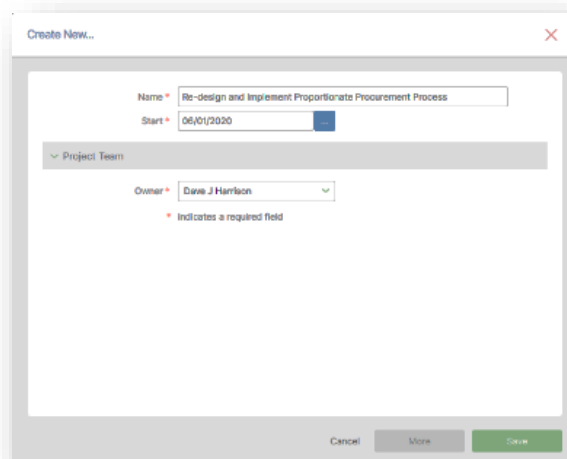
-£5,000 ★

Double Click on a Value

Setting up a new project

To create a new project, go to the Projects page and sub-page: Project Drafting.

Simply click on Create Project button (at the top of the page), give it a name, assign the Project Ownership, and Save.



An InPhase user at the Performance Manager Licence level or above can create new Projects.

Any level of user licence can be used to edit a Project once it has been created and ownership assigned by a Performance Manager level licence holder to that user.

Drafting the Project Initiation Document (PID)

Drafting a project in the PMO enables a user to fill out relevant information and details about a proposed project, to submit it for approval.

Tables for entering or selecting information for a project have 2 modes: 'data entry' mode and 'view mode'.

To select options or enter data, choose 'data entry' mode by selecting the icon in the top right corner of the table and then once you have entered your information, simply click the save icon and revert back to 'view mode'.

My InPhase Reports Portals Projects & PMO Project Drafting 02 January 2020

InPhase Central Projects PMO PMO Programmes Projects Admin

Project Drafting Approvals Updates Risks Issues Highlights Closure

My Project

Select Project
 My Project
 Create Project

Project Information

Reference	
Project Name	My Project
Linked Objective	Prevent Incidents that cause harm from happening_v2
Start Date	28/02/2020
Due Date	not set

Project Sign Off

Equality Impact Assessment	
Quality Impact Assessment	
Privacy Impact Assessment	
Has the PID been agreed?	no

Project Governance

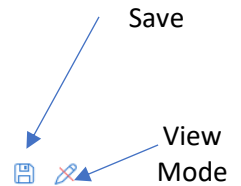
Senior Responsible Offer	
Project Sponsor	
Project Lead	
Project Team	
Project Update Owner	Dave J Harrison
Org Unit	Corporate Services

Project Information

Reference	
Project Name	- Select a Project -
Linked Objective	
Start Date	01/04/2017
Due Date	not set

Project Information

Reference	
Project Name	- Select a Project -
Linked Objective	...
Start Date	01/04/2017 ...
Due Date	not set ...



Top Tip:

You can leave the Project Drafting page and come back to it at any time and to continue filling in your details by browsing the project name from the dropdown on the page.

Create Project

Select Project

Proportionate Procurement Process

Select an option

- Select a Project -

Migrate Data

Recruit a new employee

Re-design and Implement Procurement Process

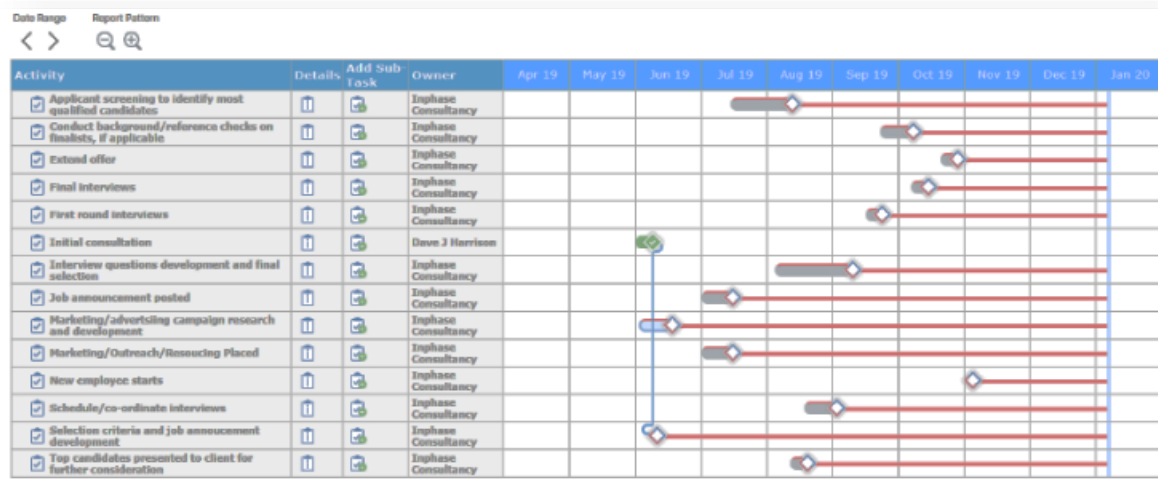
Re-design and Implement Proportionate Procurement Process

Building your Gantt

You can add activities/key actions to the selected project by clicking on 'Add Activity'. The following popup appears. Enabling you to enter in each activity for your new project plan.

Add Activity

You can include dependency links, add sub-actions to multiple levels of detail, and view them in a Gantt timeline layout with a zoom functionality, periodicity, and a scroll option for time periods.



Project Finances

Enter planned Target costs in capital and revenue expenditure categories, which will aggregate automatically to a combined total project cost (this will be approved at a later stage).

Date Range Series
 < > Target/Plan

Measure	HAK												
	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	
PR01 Cost	~	~	~	~	~	~	~	~	~	~	~	~	
PR01.1 Capital Expenditure	~	~	~	~	~	~	~	~	~	~	£50	£20	£30
PR01.2 Revenue Expenditure	~	~	~	~	~	~	~	~	~	~	£10	£20	£10

Benefits Score

Each project can have an associated project benefits score. Using a scale of 1 -20 to estimate the annual financial or outcome-based benefits that the project will provide when completed as planned. The score is for relative comparison between projects, so only the relative score is important – not the absolute figure.

Example indicative planned annual benefit scale [listing even values for brevity]

Scale	Financial benefit	Quality or Performance Benefit Improve the quality of life with time saving or outcome improvement to noticeable, significant or life changing levels for a number of people per annum		
		noticeably	or significantly	or life-changing
2	£10k per annum value add-our minimum value project	10's of people	a few	n/a
4	£50k	100+ people	10's	n/a
6	£100k	250 + people	25+	n/a
8	£250k	500 + people	50+	n/a
10	£500k	1,000 + people	100	10's.
12	£1m	2,000 +	200+,	20+
14	£2m	4,000 +	400+,	40+
16	£4m	8,000 +	800+	80+
18	£10m	20,000	2,000+	200+
20	£20m+ pa value add	50,000 people per annum	5,000 people per annum	500 people per annum

Your PMO Director/Head of Strategy/Transformation may provide an organisation specific benefits score framework.

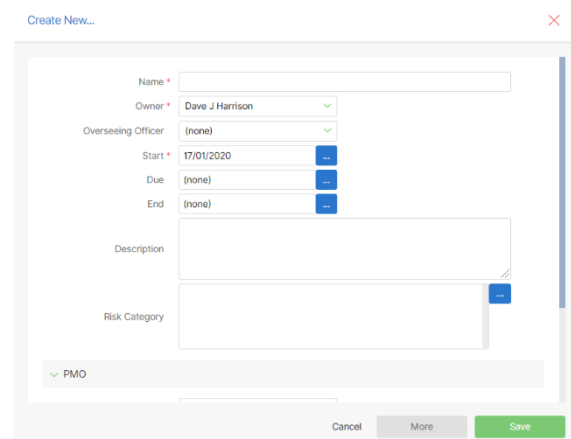
To view your cost benefit matrix there must be both an Actual Cost and an expected Benefit score for the same period. Update the expected Benefit score each period, just as you do the actual Cost.

The cost benefit analysis has a slicer for 12 periods of the financial year allowing the user to see both the latest cost benefit and progression so far of the project cost benefit over time. It is important to note that the PMO displays financial YTD costs and not project to date costs.

Project Risks, Mitigating Actions

Clicking on the 'Add Risk' button will present you with a pop-up form, on which you can add details of your new risk.

To have a project overall risk rating you must identify specific individual risks, which you rate for impact and likelihood. PMO calculates the specific risk rating (from impact and likelihood) and the combined project risk rating for you.



The screenshot shows a 'Create New...' modal form for adding a risk. The form contains the following fields and values:

- Name: (empty text input)
- Owner: Dave J Harrison (dropdown menu)
- Overseeing Officer: (none) (dropdown menu)
- Start: 17/01/2020 (calendar icon)
- Due: (none) (calendar icon)
- End: (none) (calendar icon)
- Description: (empty text area)
- Risk Category: (empty dropdown menu)

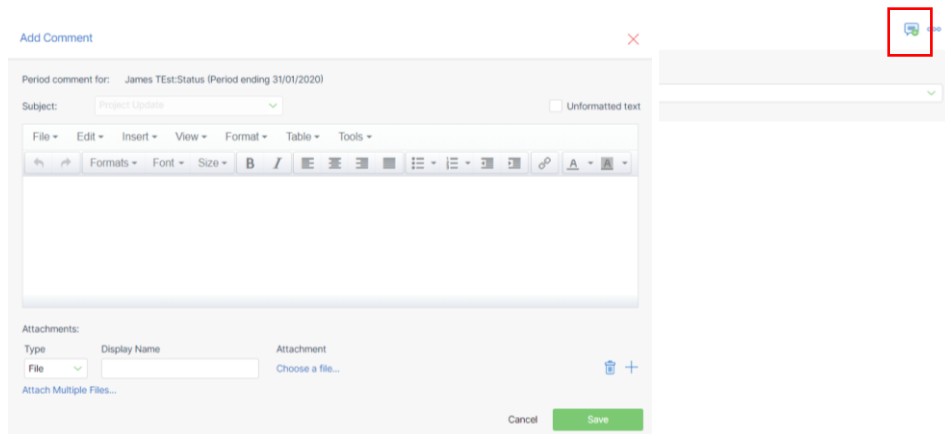
At the bottom of the form, there are three buttons: 'Cancel', 'More', and 'Save'.

Adding Mitigating Actions is the same as adding 'Activities' as described earlier in the user guide.

Project Update Narrative and Discussion

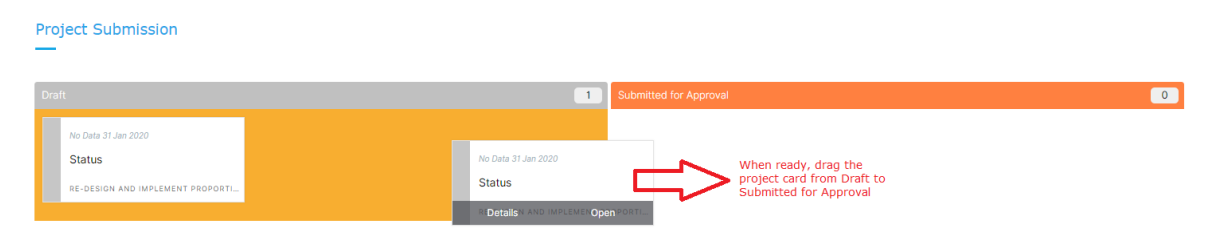
Discussions on this page will be associated to the Project overall. This can be used whilst drafting, and for discussion iterating between drafting and approval.

To Add a new discussion, click on the speech icon as highlighted below, which will then enable you to enter text for your project discussion, and link or append any documentation to the conversation.



Submitting Project for approval

Once the project is ready to submit for approval, dragging the Project Submission card from the left to the right column will move the project into the Project Approval area.



Revising if not approved

The project may be commented upon and further revisions requested in the discussion area, or it may be approved, or rejected completely. If approved, the project will move to the Update area and be included in project and Programme reports. If rejected the project will move to a 'Deactivated' area in the PMO area.

NOTE - All changes to the Project, including submission and approval stage changes are recorded in a full audit trail including date, time, and the user making the change.

Approving a draft project

Once submitted for Approval a Project will appear in the Project Approval Area and can be selected for review, revision and approval, return to draft, or rejected completely.

The Approver can Approve the project by sliding the Status card to the right or send it back into drafting by sliding it to the left or can shut the project down by sliding it to Rejected.

When approving a Project, it must be linked to a selected Programme for its data to be included in that Programme's aggregated data and reports.

The screenshot illustrates the Project Approval workflow. At the top, a 'Project Approval State' bar shows four status categories: Draft (0), Submitted for Approval (1), Approved (0), and Rejected (0). Below this, a 'Status' card is shown with a red arrow pointing to the right, indicating the action of approving. The main interface displays a table with a 'Link to Programme' column. A red circle highlights the 'Link to Programme' button in the table header, and another red circle highlights the 'Link to Programme' button in the table row for 'DB Programme A'. A 'Select Items' dialog box is open, showing a list of programmes to link to, including 'Fire Improvement Programme', 'HAK - Programme Test for PR05', 'HAK Programme Test No 017', 'PW Prog 04', and 'pw pROG 05'. The dialog also includes a 'Filter' field, a 'Name' field, and a 'Select' button.

Updating an 'Approved' Project

Costings

During a project, there will be a need each period to update the project data; with cost actual, forecast and scheduling changes. When making a substantive change to a project cost or timescale you should discuss the change in advance with the project approver in accordance with your own management policy.

Costings can change during projects. Users may realise that the cost of the remaining periods may not be as much as initially planned, or it may be more than was originally approved. Both Forecast and Target can be changed at any point under "Projects" on the page: Project Updates (under Project Finance).

There are 3 costing measures:

1. PR01.1 Capital Expenditure
2. PR01.2 Revenue Expenditure

Which are added together as the

3. PR01 Cost.
The PR01 Cost measure will always be automatically calculated so you simply enter the Capital Expenditure along with your Revenue Expenditure and the total Cost will be calculated.

Report Range < >

		Improvement Project													
Measure		Mar 2019	Apr 2019	May 2019	Jun 2019	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020		
PR01 Cost	Actual	~	£2,084	£1,994	£2,094	£2,100	£2,225	£2,225	£12,970	£2,036					
	Forecast	~	£2,084	£1,994	£2,094	£2,100	£2,225	£2,225	£12,970	£2,036	£1,510	£2,400	£0		
	Target/Plan	~	£2,500	£2,500	£2,500	£2,500	£2,500	£2,500	£2,300	£2,200	£2,200	£310	£2,300	£0	
	Baseline	~	£2,500	£2,500	£2,500	£2,500	£2,500	£2,500	£2,300	£2,200	£2,200	£310	£300	£0	
PR01.1 Capital Expenditure	Actual	~	£1,995	£1,900	£2,000	£2,000	£2,100	£2,100	£11,850	£1,900					
	Forecast	~	£1,995	£1,900	£2,000	£2,000	£2,100	£2,100	£11,850	£1,900	£1,200	£2,100	£0		
	Target/Plan	~	£2,200	£2,200	£2,200	£2,200	£2,200	£2,000	£1,900	£1,900		£2,000			
	Baseline	~	£2,200	£2,200	£2,200	£2,200	£2,200	£2,000	£1,900	£1,900					
PR01.2 Revenue Expenditure	Actual	~	£89	£94	£94	£100	£125	£125	£1,120	£136					
	Forecast	~	£89	£94	£94	£100	£125	£125	£1,120	£136	£310	£300	£0		
	Target/Plan	~	£300	£300	£300	£300	£300	£300	£300	£300	£310	£300	£0		
	Baseline	~	£300	£300	£300	£300	£300	£300	£300	£300	£300				

There are three series associated with each cost measure.

During planning of the project, the initial target cost should be entered. This is the target budget that the Approver will be using to decide as to whether to approve, return for re-drafting or reject completely.

The baseline is a series that the project approver can save as a record of the target budget they have approved. This cannot be changed at a later stage. See next 'baseline' section for more details.

The target/plan will be the same as the baseline initially, however if you amend the target/plan later, it is always possible to compare actual and revised plan back to the original baseline.

The forecast can also be updated continuously, with new information and evaluation. It is best practise to update the forecast as early as possible when you expect a variation from planned costs, not just as you

approach a deadline! Forecast is updated by selecting 'Data Entry' and simply typing in your new figures in the relevant month(s).

The Forecast series is automatically updated with historic actual costs. This enables the forecast to year end to consider the historic actual values without the user needing to update the history. It is the best forward looking forecast not a record of what you historically forecast.

The Actual is what was actually spent in that month (time period) which can be entered in 'Data Entry' mode in the relevant month(s).

Baseline

During the life cycle of a Project, you might need to adjust your original planned costs that were agreed with your internal stakeholders. If you baseline the original approved project planned costs, you can retain this saved as a baseline reference plan, in addition to any subsequent changes to planned costs. This enables you to compare the actual costs with the original planned costs as well as any revised plan costs.

As you can see the baseline (series) function is set at the initial stage of approval a project. It allows users to keep track of how far (or close) the project costings have varied from the original approved plan.

Project Quality

Periodic RAG ratings can be given to assess the quality of the project, with the option to leave a comment – also periodically.

Project Gantt, Project Risks, Mitigating Actions, Benefits Score, Project Discussion


All these sections are identical to what is on the **Project Creation** page with the ability to provide updates in all these areas.

Project Issues

Any issues related to the project can be added here and updates made to the fields using the table. When the comment icon is selected a comment can be left against comment subject **issue update** (a newly created comment subject in Administrator)

Project Issues

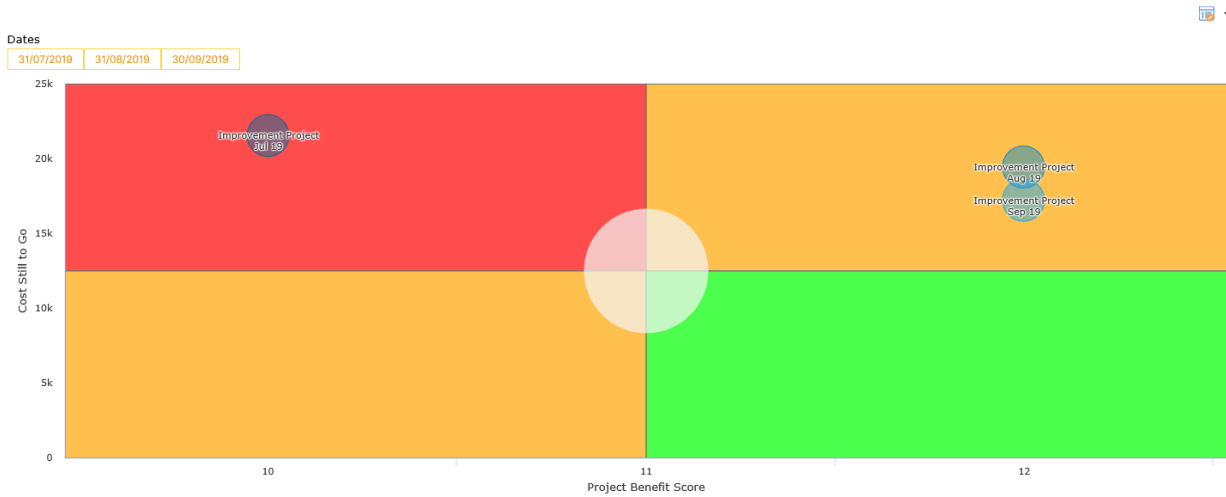
Add Issue

September 2019											
Issue Name	Issue Update	Rating	Issue Description	Issue Type	Severity	Escalation Status	Reported by	Issue Owner	Start Date	Resolution Date	Comment Update
Delivery of incorrect monitor sizes		Amber	We've received 2 incorrect monitors despite being invoices for 21" screens	Problem	Medium	De-Escalated to Project Manager	inphase support	Dave J Harrison	03/06/2019	not set	
Test issue January 2020	n/r	n/r		Request for Change	Medium	Not Escalated		Inphase Consultancy	10/01/2020	not set	n/r

Cost Benefit Analysis

In order to view your cost benefit matrix there must be both an Actual Cost and an expected Benefit score for the same period. Update the expected Benefit score each period, just as you do the actual Cost. You can then see any movement over time of the cost to go (how much more do you still need to spend, to achieve what level of expected annual benefits).

Cost Benefit Analysis

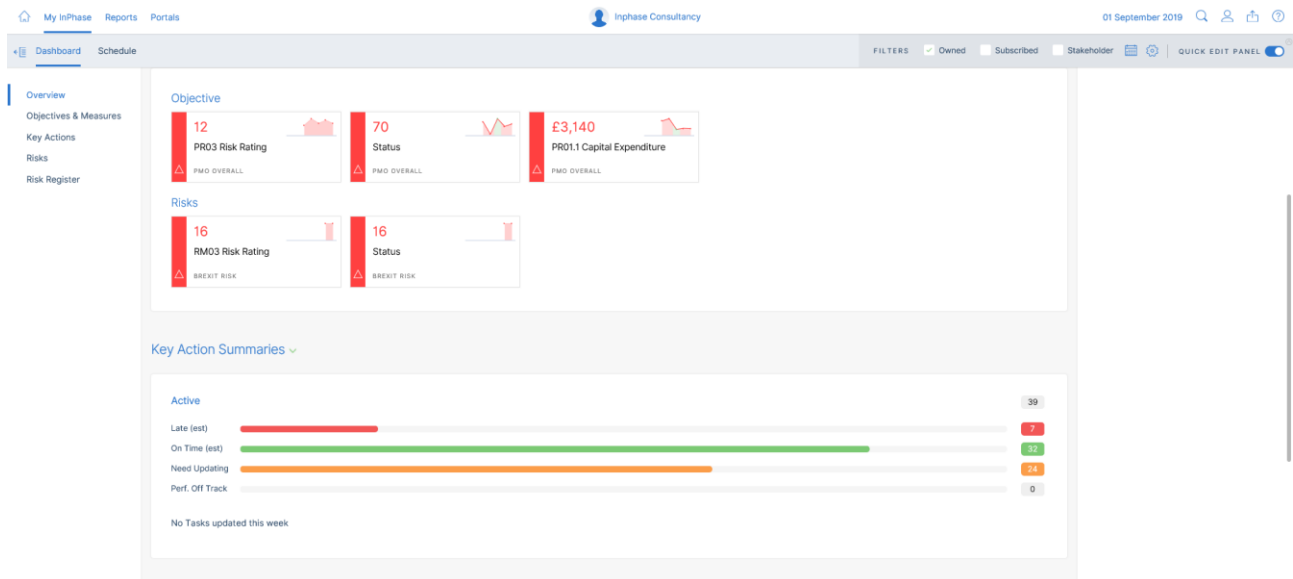


Using My InPhase

The left panel menu access dashboards on each type of information for the user.

The main panel contains the information, in sunbursts, critical exception alerts, performance cards and lists, badges.

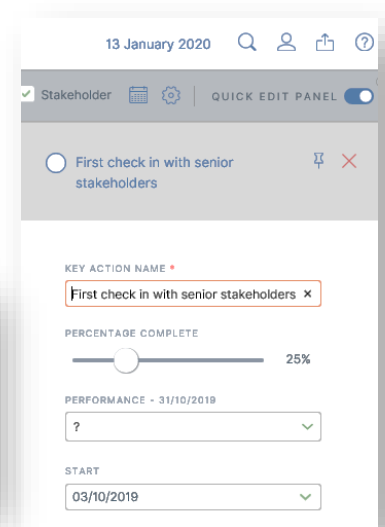
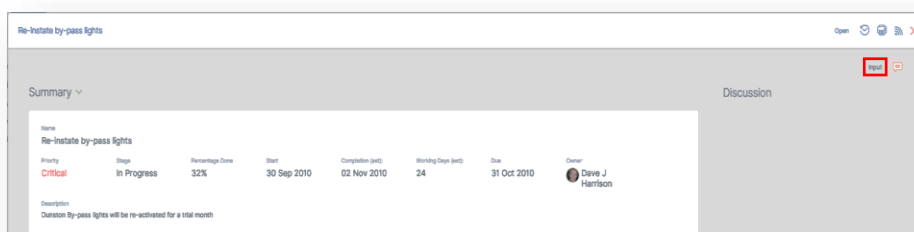
The right-hand panel in Overview provides a personal schedule for due, overdue and upcoming actions and measure updates, as well as any discussions on their actions.



Updating within My InPhase

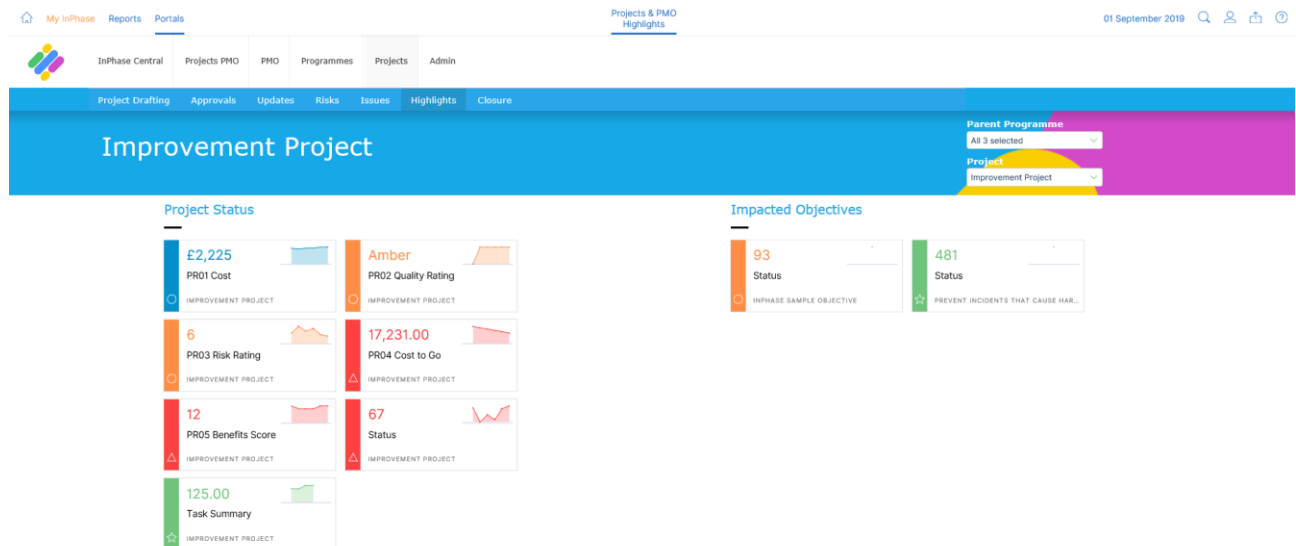
All users can update any Action, Projects, Risk, Issue or Measure of which they are the allocated owner, from within their My InPhase, as well as in the related Portal Page (such as the Project Updates page).

Updates can be made by either double clicking on the item and opening the performance analysis Details pop-up and selecting Input, or by opening the Details or Notebook from the context menu (right mouse) or activating the Quick Edit panel on the right-hand side of the page and clicking once on the item.



Projects Highlights

The Project Highlight page enables you to view the scope of the project with its main key summary points. Some of the data entry tables displayed when creating a new project have been included on the highlights page which enables the user to amend these details (such as sponsor) if necessary, during the project.



The screenshot displays the 'Improvement Project' highlights page. At the top, there is a navigation bar with 'My InPhase', 'Reports', and 'Portals'. Below this, a secondary navigation bar includes 'InPhase Central', 'Projects PMO', 'PMO', 'Programmes', 'Projects', and 'Admin'. The main content area is titled 'Improvement Project' and features a dropdown menu for 'Parent Programme' (set to 'All 3 selected') and another for 'Project' (set to 'Improvement Project').

The 'Project Status' section contains several key metrics:

- £2,225** PR01 Cost (Improvement Project)
- Amber** PR02 Quality Rating (Improvement Project)
- 6** PR03 Risk Rating (Improvement Project)
- 17,231.00** PR04 Cost to Go (Improvement Project)
- 12** PR05 Benefits Score (Improvement Project)
- 67** Status (Improvement Project)
- 125.00** Task Summary (Improvement Project)

The 'Impacted Objectives' section shows two objectives:

- 93** Status (INPHASE SAMPLE OBJECTIVE)
- 481** Status (PREVENT INCIDENTS THAT CAUSE HAR...)

Managing your Programmes

The structure within PMO is that you create projects at the lowest level in a hierarchy. Multiple projects make up a programme and multiple programmes are supported within the PMO.

Navigation and Sub-pages

To view your Programmes in the PMO, navigate yourself to the 'Programmes' page. This page is split into sub-pages:

1. Programme Costs
 - a. This sub-page shows you the costing involved for the Selected Programme overall and all of its projects
 - b. This page also includes variance from budget for each project, project manually entered forecasts and access to statistical regression and forecast. Statistical forecasts are useful if the programme has been running for a 2-3 year or longer period and is expected to have a regular on-going cost trend.
2. Programme Risks

This page shows the Programme level Risks, and the escalated Project level risks which sit inside the selected programme.

Programme Risks

Owner: | Overseeing Officer: All 2 selected | Project: All 1 selected

Programme	Risk	Add Mitigating Actions	Risk Owner	Escalation Status	September 2019		
					RM01 Risk Impact Rating	RM02 Risk Likelihood Rating	RM03 Risk Rating Rating
Fire Improvement Programme	Test Programme Risk October		Inphase Consultancy	Not Escalated	n/r	n/r	n/r
	Brexit Risk		Inphase Consultancy	Not Escalated	5	4	20

Escalated Project Risks

Owner: | Overseeing Officer: All 1 selected

Project Name	Add Mitigating Actions	Risk	Risk Owner	Escalation Status	September 2019		
					RM01 Risk Impact Rating	RM02 Risk Likelihood Rating	RM03 Risk Rating Rating
Daphne - Test Project 2		Test Risk Escalation	Dave J Harrison	Escalated to Programme Board			
		October Created Risk	Inphase Consultancy	Escalated to Programme Board	n/r	n/r	n/r
DB - Test Project Office		DB Project Risk	James Walker	Escalated to Programme Board	4	2	8
		DB Test Risk November	Inphase Consultancy	Escalated to Programme Board	n/r	n/r	n/r

Clicking on a Risk in the top Tables will focus the lower Mitigating Actions Table for that Risk.

3. Programme Issues
 - a. Displays all the Programme level issues and the escalated issues from all the projects within a programme.

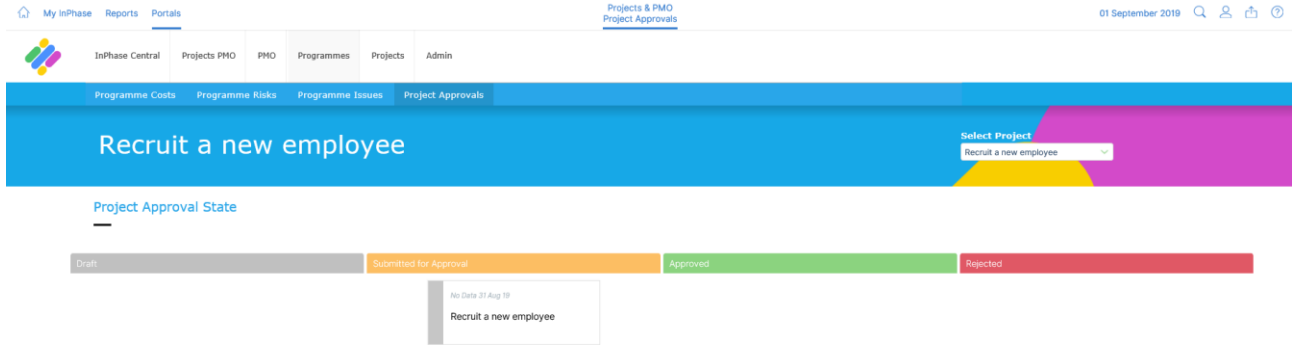
Programme Level Issues

Owner: | Rating: Blank

30 Sep 2019										
Issue Name	Rating	Severity	Issue Description	Issue Type	Escalation Status	Reported by	Issue Owner	Start Date	Resolution Date	Issue Update
Amber Medium	~	Medium		Off Specification	Not Escalated		John User	23/01/2020	not set	~
Green Low	~	Low			Not Escalated		Dave J Harrison	01/10/2019	not set	~
Short stock of PPE	~	High			Not Escalated		Dave J Harrison	01/12/2019	not set	~

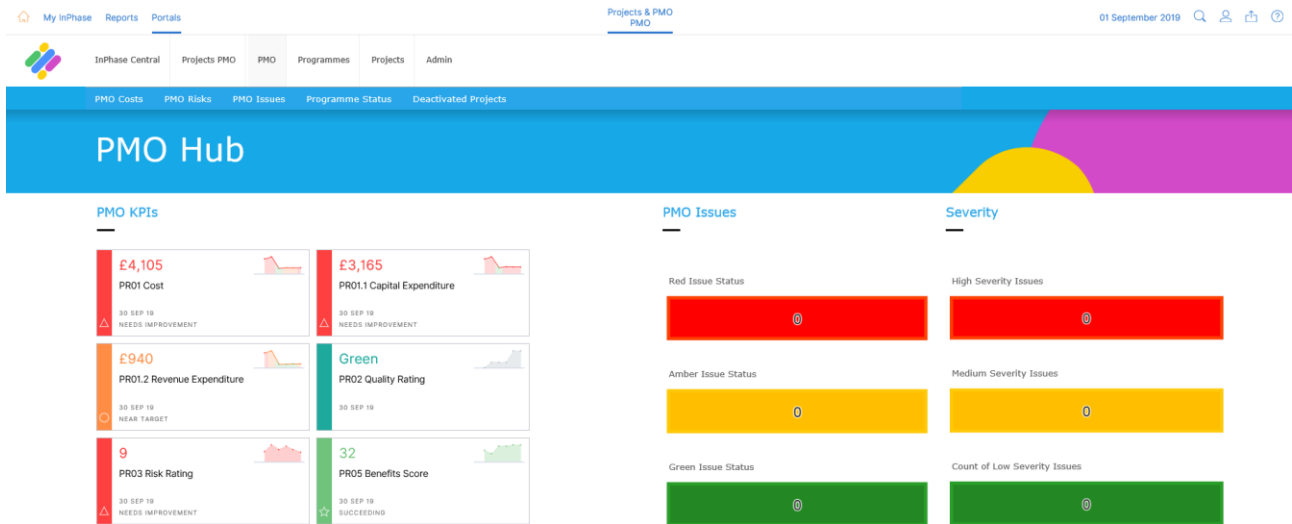
4. Project Approvals

This 'Projects Approvals' page appears in both the "Programmes" and the "Projects" sections for ease of access for both when the Programme Manager needs to approve projects, and in "Projects" for when a Project Manager has authority to approve a project.



PMO

The PMO hub is designed for Programme Director and other senior team members and to give the broadest overview. By viewing performance at this level, you have an oversight as to how the organisation is performing in projects across the organisation in a real-time view.



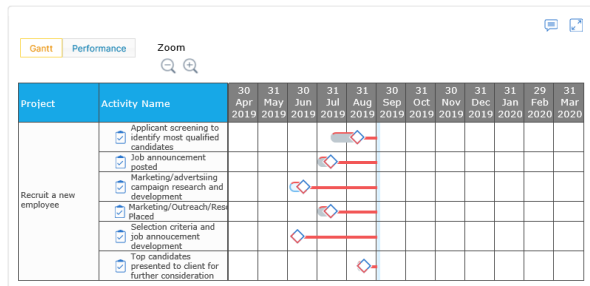
PMO Finance

Actual Cost YTD	Full FY Target	YTD v Full FY Target
£61,468	£148,239	-£86,771 ★

Number of Programmes where Actual Cost YTD higher than Target Cost YTD

1

Overdue Project Tasks



In the lower section of the page, you can see the overall status, and the key metrics of each Programme, as well as the comparative cost-to-go v benefit matrix.

Double clicking on data, cards, or visualisations, or using the right context menu, enables you to access the Performance Details pop-up, which has extensive information and access to drill-down and impacted (drill-up) capabilities.

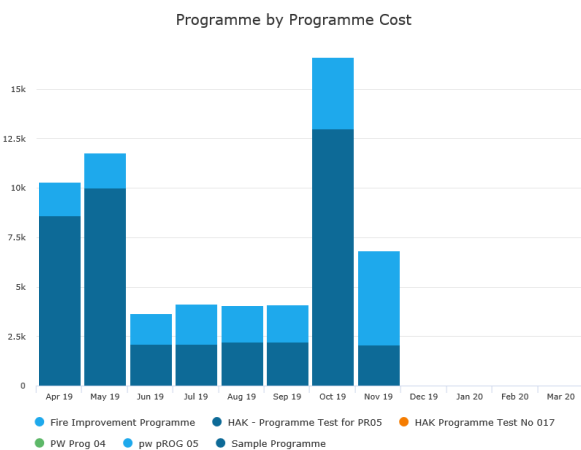
Sub Pages

Consistently with “Projects” and the “Programmes”, the PMO Hub has subpages.

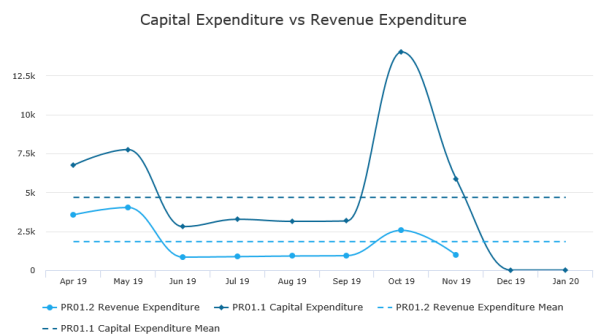
PMO Costs

Cost page displays overall cost for all programmes, composition of total by programme, breakdown by Capex v Revex , variance against budget by programme by period, actual target and forecast performance, and identifies any Programmes currently over YTD budget actual v target cost.

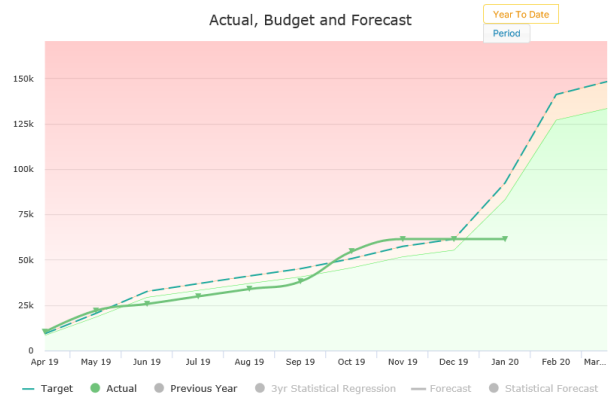
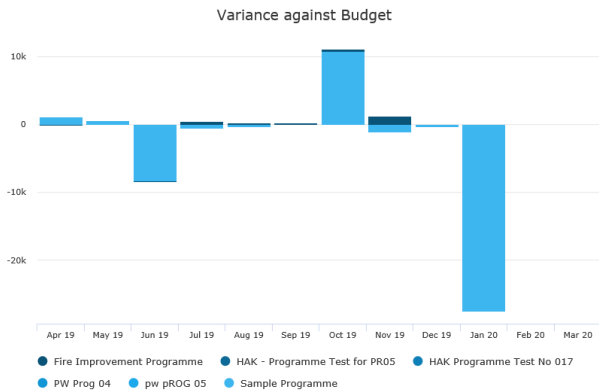
Programme Cost Breakdown



PMO Cost Detail



Capex vs Revex	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20
PR01.2 Revenue Expenditure	£3,559	£4,034	£844	£875	£915	£940	£2,570	£971		
PR01.1 Capital Expenditure	£6,745	£7,750	£2,800	£3,275	£3,140	£3,165	£14,020	£5,845	£10	£10
PR01 Cost	£10,304	£11,784	£3,644	£4,150	£4,055	£4,105	£16,590	£6,816	£10	£10



PMO Risks

This page shows the PMO level Risks, and the escalated Programme level risks which sit inside the selected programme.

Clicking on a Risk in the top Tables will focus the lower Mitigating Actions Table for that Risk.

PMO Risks

Owner: Dave, Inphase, Inphase

Overseeing Officer: All 1 selected

Risk	Mitigating Actions	Risk Owner	Escalation Status	September 2019		
				RM01 Risk Impact Rating	RM02 Risk Likelihood Rating	RM03 Risk Rating
HAK Test 3	Inphase Consultancy	Inphase	Not Escalated	n/r	n/r	n/r
High level disagreement		Dave J Harrison	Escalated to PMO Board	n/r	n/r	n/r
Test PMO Risk	Inphase Consultancy2	Inphase	Not Escalated	n/r	n/r	n/r

Escalated Programme Risks

Owner: Dave, Inphase

Project Name: All 2 selected

Overseeing Officer: All 1 selected

Project Name	Risk	Mitigating Actions	Risk Owner	Escalation Status	September 2019		
					RM01 Risk Impact Rating	RM02 Risk Likelihood Rating	RM03 Risk Rating
DB - Test Project	DB Project Risk 2		Dave J Harrison	Escalated to PMO Board	1	2	2
DB October Project	October Risk		Inphase Consultancy	Escalated to PMO Board	n/r	n/r	n/r

PMO Issues

Contains all the Programme level issues and the escalated issues from all the projects within a programme. New Issues raised can be entered on this page.

PMO Issue Register

Create PMO Issue

PMO Issues



Owner



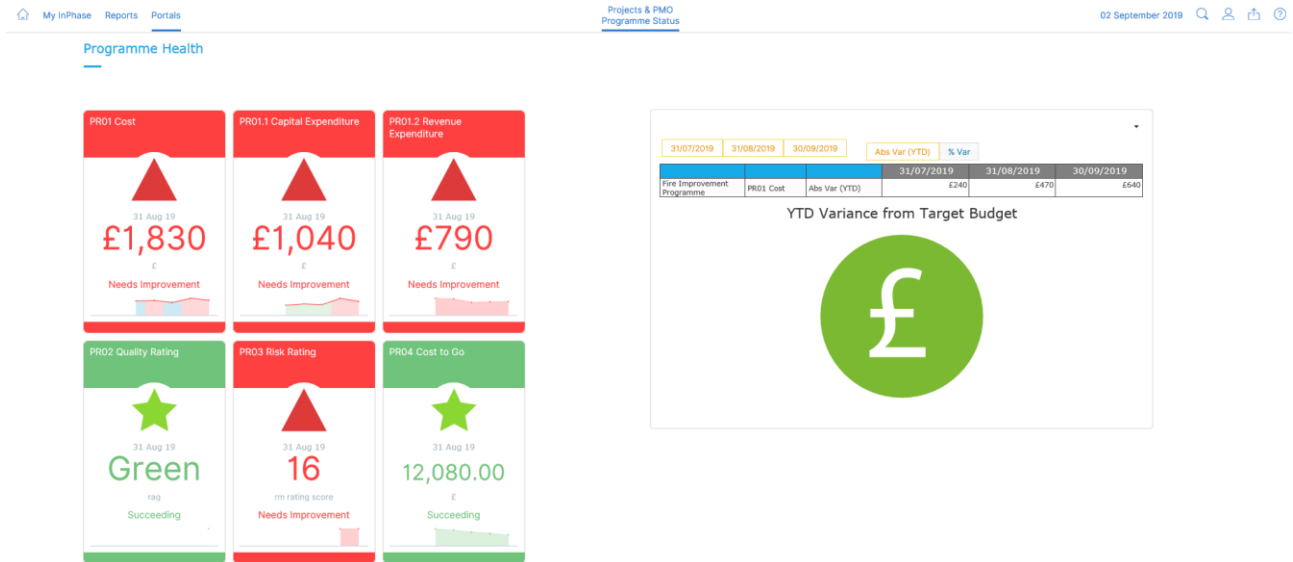
Rating

Blank

September 2019												
Project Name	Issue Name	Issue Owner	Escalation Status	Rating	Severity	Issue Description	Issue Type	Reported by	Issue Owner	Start Date	Resolution Date	Issue Update
	Amber	John User	Not Escalated	~	Low				John User	01/12/2019	not set	~
	HAK PMO Overall Issue 1	Inphase Consultancy	Not Escalated	~	Low				Inphase Consultancy	13/01/2020	not set	~
	New PMO system is slow to be procured	Dave J Harrison	Not Escalated	~	Low				Dave J Harrison	22/01/2020	not set	~
PMO Overall	PMO Issue test 1	Inphase Consultancy	Not Escalated	~	Low		Off Specification	System System	Inphase Consultancy	01/10/2019	not set	~
	PMO Test - Issue Test	Inphase Consultancy2	Not Escalated	~	Low				Inphase Consultancy2	14/01/2020	not set	~
	RED	Dave J Harrison	Not Escalated	~	Low				Dave J Harrison	02/11/2019	not set	~

Programme Status

Programme Status provides the current and recent trend in overall performance of each selected Programme, the current Variance from financial budget and the stages of the projects in the Programme



Deactivated Projects

When proposing new projects, there is an approval process involved. If any projects are deactivated, including Rejected from approval, or cancelled or deferred once approved they will be moved to this page in case a high-level decision is made to reverse those decisions.

Project Information

Reference	
Project Name	- Select a Project -
Linked Programme	Sample Programme
Linked Objective	
Start Date	01/04/2017
Due Date	not set

Project Sign Off

Equality Impact Assessment	
Quality Impact Assessment	
Privacy Impact Assessment	
Has the PID been agreed?	no

Project Governance

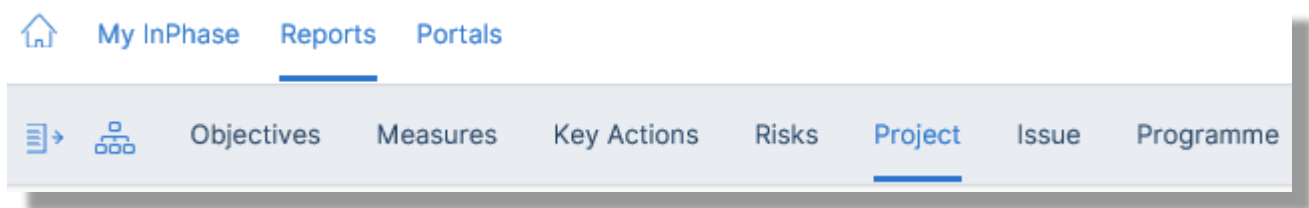
Senior Responsible Offer	
Project Sponsor	System System
Project Lead	
Project Team	
Project Owner	Model Administrator
Org Unit	Corporate

Using Reports for Organisation Unit Reporting

Report Description

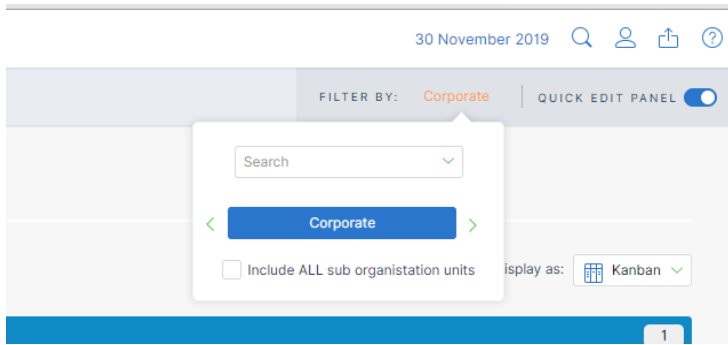
Within the standard 'Reports', you can access a list of pre-built reports saving you the time and effort in creating them yourself. The table below shows the name of each report with a small description.

Each report can be utilised for your project reporting by simply selecting the entity 'Project' as shown below in the screenshot.



Report Name	Description
All	This will show all entities
Trends and Actions	A report that shows your objectives linked to current performance over time, with any associated actions
Overview	A summary for all entities
Worst Performing	The entities which are furthest away from target
Ranked by Poor Performance	All red ranked entities (dependant on the type of performance scheme)
Critical for last 3 periods	Constantly performing bad for last 3 reporting periods
All High Priority	Entities usually will have a level of priority associated – this will show all high priority
Best Performing	All entities performing well
Performance Ranked	Entities ranked by how well their performance is
All Performing Well	Meeting targets
Continuously Performing Well	Constant period of hitting targets and good performance
Missing Data	Any entities which require data will be listed
Quartile Ranked	Ranked for each 25%
Most improved	The entities which have increased in performance the most
Ended	Entities which are no longer active but still stored in the system
By Stage	Most entities will have a stage: in progress, completed etc. This lists them by stage
By Priority	List all entities by priority
By Owner	Owners displayed with their objectives

You can filter the report on specific Organisation Units by selecting from the Org filter.



You can see the Org structure by selecting form the Organogram icon on the left

