Excel Templates Guides, Description, Download and installation.

Basic Action Register

Action Register

pmo docs

Project Name:	<Add Detail Here>
Client Name:	<Add Detail Here>
Client Contact:	<Add Detail Here>

Project Code	<Add Detail Here>
Project Manger	<Add Detail Here>
Tech Lead	<Add Detail Here>

ID	Date Raised	Title	Description	Owner	Impact	Date Required	Notes	Status	Date Closed
A01	1/01/2021	Order Servers	Require 6 x Dell servers	Procurement	Medium	15/01/2021	01/01/21 - Emailed procurement to send PO to Dell for the 6 x servers	Open	
A02	1/01/2021	Onboard new resoruce	New tech lead assigned to project	Project Manager	High	1/01/2021	01/01/21 - New tech lead onboarded	Closed	1/01/2021
A03					Low				
A04									
A05									
A06									
A07									
A08									
A09									
A10									
A11									
A12									
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A23									
A24									
A25									

Description

An action register is a central place where the project manager can record all the different actions associated with the project, its owners, due dates, and other important information.

Action registers are also useful for individual project team members, especially if they are working on multiple projects with different project managers. It is a great way to show workload and availability if a central tool to manage this is not available.

How to Use

ID

Give each Action a unique ID so that it can be tracked easily and cross referenced for example in a Change Request or in a Risk or Issue Register. Example: AI01, AI02, AI03...

Date Raised

This is the date the Action was raised.

Title

This is where you give a title to the Action

Description

A clear description of the Action to be taken along with any relevant cross references, e.g. to a change request or issue

Owner

Here you enter the person’s name or Department who owns the Action.

Impact

Here you enter the impact this Action will have on the project. High Medium or Low

Date Required

Here you enter the date the required for the Action to be closed or updated

Notes

Here you enter the notes in relation to the Action, how it is progressing, if you are blocked or waiting on someone within the team to Action a related item before you can close yours. Always start with a date MM/DD/YY – add note

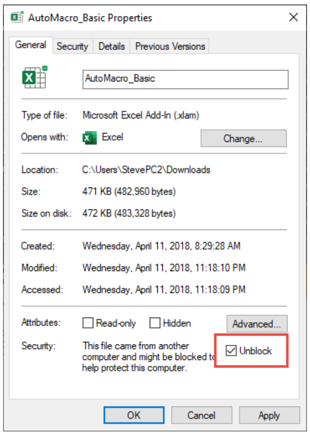
Status

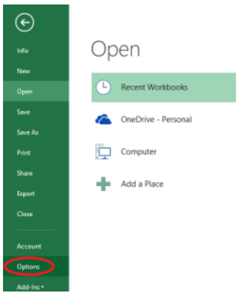
Here you enter the Status of the Action, either still Opened or Closed

Date Closed

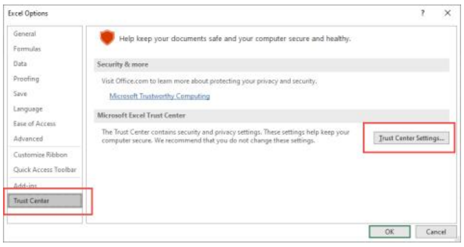
Here you enter the date the Action was closed. Can also be referenced in a report along with the Action ID.

How to install the Excel .xlam file (Add-in)

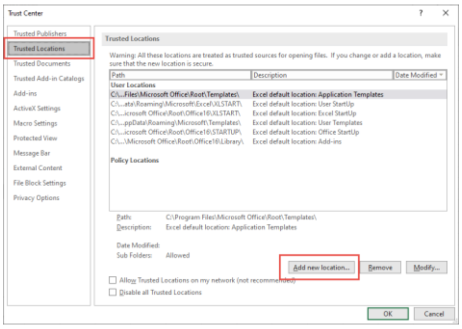
1. Save Add-in to Computer
    a. Make sure to download and save the add-in (.XLAM file) to your computer. Pick a folder that’s easy to find (E.g., My Documents\PMOdocs\xlam files)
2. Unblock the File
    a. After saving the file, locate the file in the Windows Explorer.
    b. Right-click the file and select Properties.
    c. Make sure the Unblock box is checked near the bottom of General Tab.
    d. 

3. **This step is optional as the issue has been resolved in recent updates.**
    a. Trust the File Location
    b. In July 2016, Microsoft added a security update that requires you to add the .XLAM file location as a Trusted Location in order for the add-in to work.
    c. Go to File > Options > Trust Centre > Trust Centre Settings… > Trusted Locations > Add New Location
    d. 

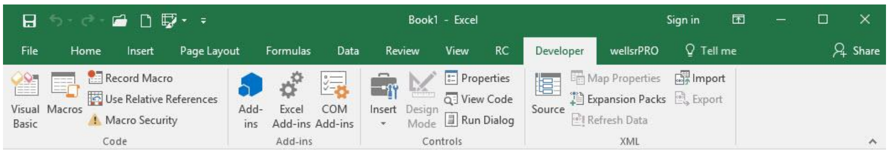
    e. **Trust Center > Trust Center Settings**

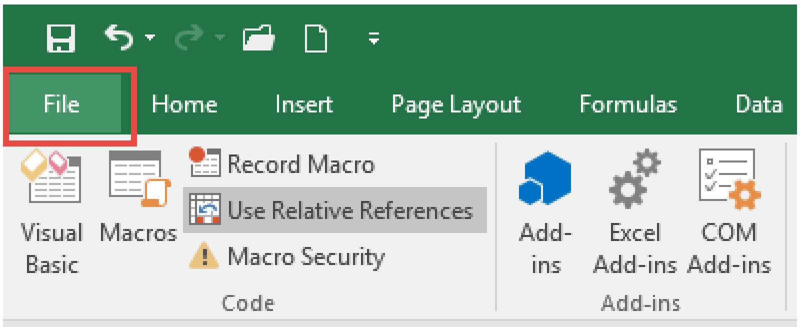
f. 

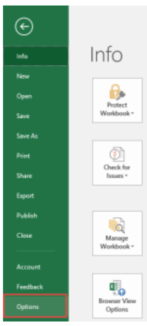
g. Trusted Locations > Add New Location

h. 

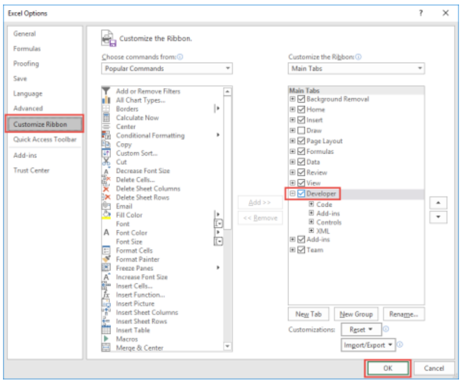
i. Add New Location: Browse to the file location containing your add-in (or you can move your add-in file to one of the existing Trusted Locations)

4. Make Sure the Developer Tab is Visible
5. 

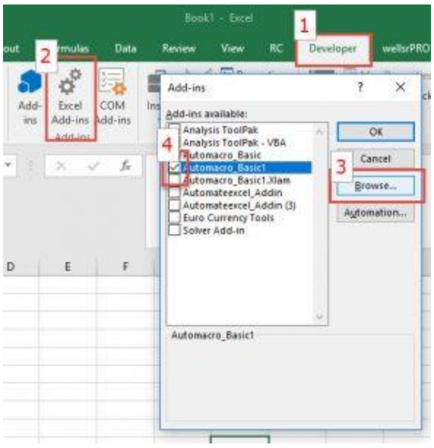
   a. If you don't see the Developer Tab then follow these instructions: Add Developer Ribbon.
6. Click File as shown below
7. 

8. Click Options
9. 

10. In the left-hand pane, click Customise Ribbon.

11. 

12. Click the developer check box and click ok at the bottom.
13. Once you have the Developer Tab appearing on the ribbon
14. Browse to File.
    a. Go to Developer > Excel Add-ins > Select Browse and navigate to your file (E.g., My Documents\PMOdocs\xlam files)
    b. Once your file appears inside the Add-in Box, ensure you enable the check box per picture below.

15. 

16. Make sure the add-in has a check mark next to it and click OK.
17. Your add-in is now installed! And the customised tab will now appear on the Ribbon.