Excel Templates Guides, Description, Download and installation.

Basic Issue Template

Issue Register

Issue Register

Project Name:	<Add Detail Here>	**Project Code**	<Add Detail Here>
Client Name:	<Add Detail Here>	**Project Manger**	<Add Detail Here>
Client Contact:	<Add Detail Here>	**Tech Lead**	<Add Detail Here>

ID	Date Raised	Title	Description	Probability	Impact Response	Impact Response Plan	Response Owner	Status	Notes	Date Closed
IS01	1/01/2021	Resource Not available	Resource not able to join the project for 3 weeks	Medium	Share	Bring in third party organisation or Contractor	Project Manger	Closed	01/01 - Procurement requesting quotes, received and reviewed and contractor onboarded	1/01/2021
IS02	2/01/2021	Telecom Delivery Date	Telecom vendor unable to deliver as per scheduled date	High	Transfer	This issue in now owned by the Telecom vendor and has to provide	Project Manger	Open	02/01 - Telecom account manager preparing mitigation plan for review and approval	
IS03										
IS04										
IS05										
IS06										
IS07										
IS08										
IS09										
IS10										
IS11										
IS12										
IS13										
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IS17										
IS18										
IS19										
IS20										
IS21										
IS22										
IS23										
IS24										
IS25										

Description

The Issue Register captures and keeps track of all formal issues. It is regularly monitored by the Project Manager throughout the project. The purpose of the Issue Register is to capture and maintain information on all the formal issues, informal issues are normally placed in the Daily Log by the Project Manager

How to Use

ID

Give each Issue a unique ID so that it can be tracked easily and cross referenced for example in a Status Report. Numbering Example: IS01, IS02, IS03...

Date Raised

This is the date the Issue was raised and first entered into the Issue Register.

Title

In this column, provide a Title for the Issue. If this is a Risk that has been elevated to an Issue, keep the same name, and close the Risk.

Description

Provide a clear description of the Issue here and how it is impacting the project.

Probability

Rate the Probable impact this Issue will have on the project, as an example, Low Medium, High or Critical.

Impact Response

Rate the response of the Impact. Will the project Accept the Issue, Share the Issue, Transfer the Issue or Mitigate the issue.

Impact Response Plan

Describe the response plan here. E.g. If you are going to Share the issue, your plan could be to bring in third party to assist in resolution as they have expertise to resolve issues like this.

Response Owner

Here you enter the person’s name or Department who owns the Issue, they will also be responsible for reporting on its progress.

Status

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

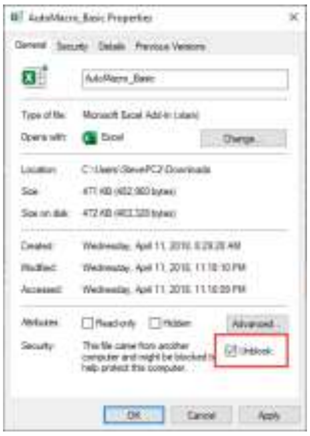
Notes

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

Date Closed

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

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

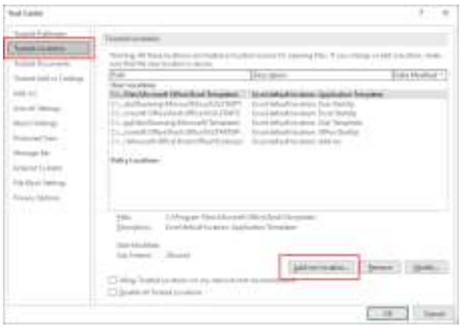
1. Save Add-in to Computer
    a. Make sure to download and save the add-in (.XLAM file) to your computer. Pick a folder that is easy to find (E.g., My Documents\PMOdocs\xlam files)
2. Unblock the File.
    a. After saving the file, locate the file in the Windows Explorer.
    b. Right-click the file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

3. **This step in 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 Centre > Trust Centre Settings**

f. 

g. Trusted Locations > Add New Location

h. 

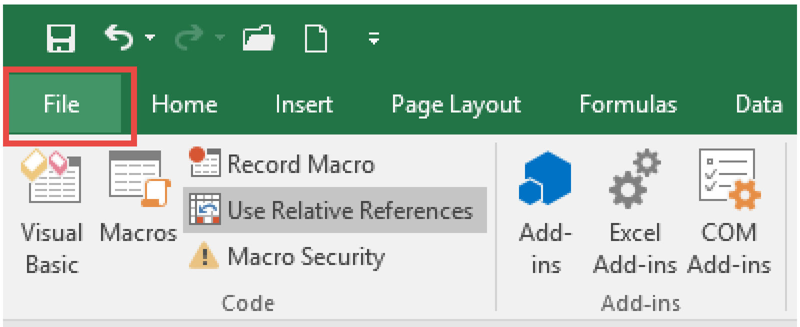
i. Add New Location: Browse to the file location containing your add-in (or you can move your add-in file to one of the existing Trusted Locations)

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.

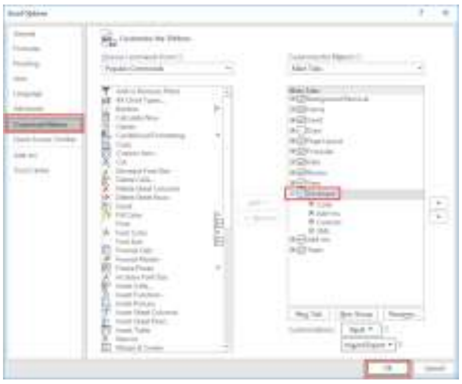
6. Click File as shown below

7. 

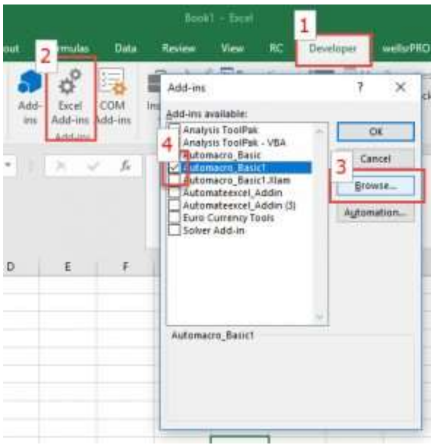
8. Click Options

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.