pmo docs

Excel Templates Guides, Description, Download and installation.

Basic Lesson Learned Template

Lesson Learned Register

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	Type of Lesson	Cause/Trigger	Recommended Action	Raised By	Recommendations for Future Projects	Artifact	Status	Date Closed
D01	8/01/2021	Templates	Design Review	Agree on templates to use. Vendor or customer	Project Manager	Ensure this is in the assumptions of future contracts			
D02									
D03									
D04									
D05									
D06									
D07									
D08									
D09									
D10									
D11									
D12									
D13									
D14									
D15									
D16									
D17									
D18									
D19									
D20									
D21									
D22									
D23									
D24									
D25									

Description

A project document used to record knowledge gained during a project so that it can be used in the current project and for future projects. Capturing lessons learned should be an on-going effort throughout the life of the project

How to Use

ID

Give each Lesson Learnt a unique ID so that it can be tracked easily and cross referenced and included in reports on Lesson Learnt. Example: LL01, LL02, LL03...

Date Raised

This is the date the Lesson Learnt was raised.

Type of Lesson

Describe what the Lesson was related to within the project. (Templates) Templates used were not of sufficient quality as to provide the required detail.

Cause Trigger

Where was the Lesson first picked up? E.g. During a design review, first build of server or in review of requirements

Recommended Action

Agree during project kick off to review templates and processes for use in the project

Raised by

The person who raised the Lesson Learnt

Recommendations for Future Projects

How do we stop this from reoccurring? Raise in PIR, email to Manager outlining the Lesson learnt and action to remediate.

Artifact

This is the decision of the Lesson Learnt meeting, how is the Lesson recorded, email, signed Lesson Learnt Registe and where will it be located for further action.

Status

Here you enter the Status here, the Lesson is either accepted or rejected.

Date Closed

Here you enter the date the Lesson Learnt was closed.

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 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.
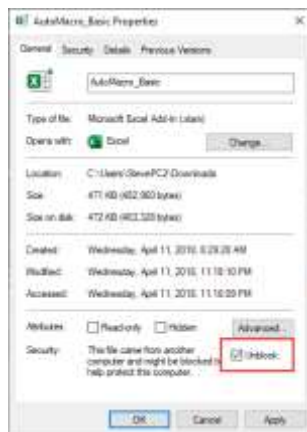
3. **This step in optional as the issue has been resolved in recent updates.**

   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**
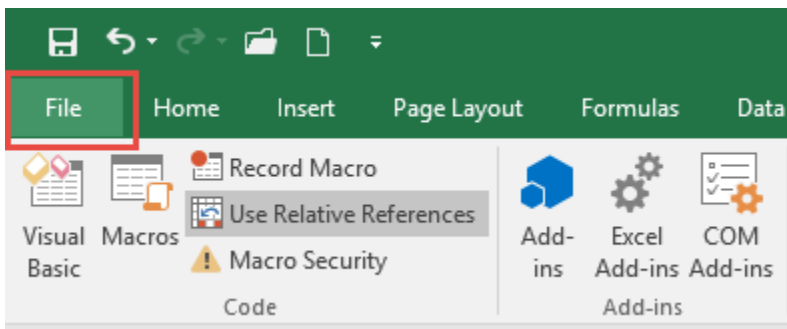
f.

g. Trusted Locations > Add New Location
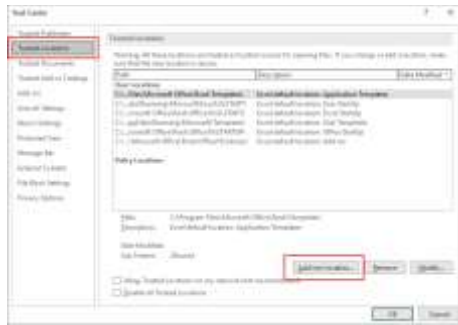
h.

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.

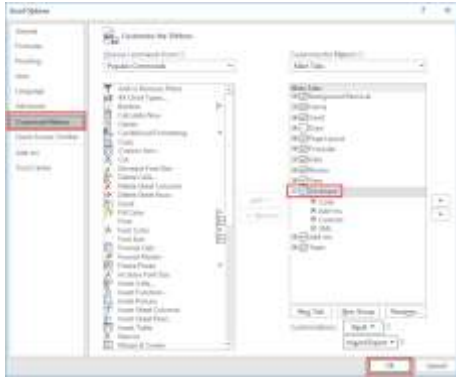a. If you don't see the Developer tab then follow these instructions: Add Developer Ribbon.

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.
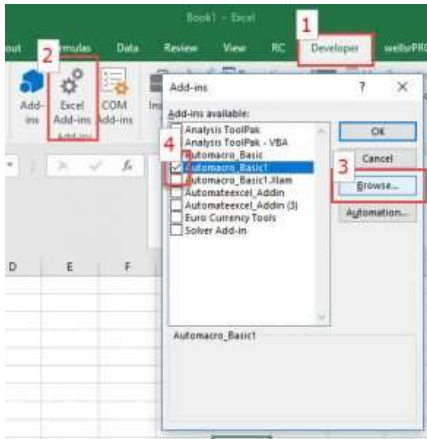
15.

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.