pmodocs

Excel Templates Guides, Description, Download and installation.

Basic RAID Template (Risk – Action – Issue – Decision)

RAID Register

RAID Register Summary

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>

Open Risks	1	**Open Actions**	1
Closed Risks	1	**Closed Actions**	1

Risk	**Total**	2	**Actions**	**Total**	2
	High	1		**High**	1
	Medium	1		**Medium**	1
	Low	0		**Low**	0

Open Issues	1	**Open Decisions**	1
Closed Issues	1	**Closed Decisions**	1

Issues	**Total**	2	**Decisions**	**Total**	1
	High	1		**High**	0
	Medium	0		**Medium**	0
	Low	1		**Low**	1

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RISK

Risk 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 1-2-3-4-5	Impact 1-2-3-4-5	Risk Rating	Mitigation	Owner	Status	Notes	Date Closed
R01	1/01/2021	Resource Availability	Resources currently not booked	4.00	4.00	High	Send request to Resource Manger	Project Manger	Open	01/01 - Ensure resources are available	
R02	2/01/2021	Telecom Delivery Date	Telecom vendor unable to deliver as per scheduled date	3.00	4.00	Medium	Escalate to Telecom Account Manager	Project Manger	Closed	01/01 - Telecom account manager was able to assist in getting more resources assigned internally	1/02/2021
R03											
R04											
R05											
R06											
R07											
R08											
R09											
R10											
R11											
R12											
R13											
R14											
R15											
R16											
R17											
R18											
R19											
R20											
R21											
R22											
R23											
R24											
R25											

ACTION

Action 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	Owner	Impact	Date Required	Notes	Status	Date Closed
A01	1/01/2021	Order Servers	Require 6 x Dell servers	Procurement	High	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 resource	New tech lead assigned to project	Project Manager	Medium	1/01/2021	01/01/21 - New tech lead onboarded	Closed	1/01/2021
A03									
A04									
A05									
A06									
A07									
A08									
A09									
A10									
A11									
A12									
A13									
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A16									
A17									
A18									
A19									
A20									
A21									
A22									
A23									
A24									
A25									

ISSUE

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	Low	Mitigate	Bring in third party organisation or Contractor	Project Manager	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 is now owned by the Telecom vendor and has to provide	Project Manager	Open	02/01 - Telecom account manager preparing mitigation plan for review and approval	
IS03										
IS04										
IS05										
IS06										
IS07										
IS08										
IS09										
IS10										
IS11										
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IS24										
IS25										

DECISION

Decisions 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 By	Title	Description	Impact	Approved By	Date Approved	Artifact	Status	Date Closed
D01	8/01/2021	PM	Migration Date	Date the migration is to be started	Low	Customer SteerCo	12/01/2021	Email to Vendor PM	Closed	14/01/2021
D02										
D03										
D04										
D05										
D06										
D07										
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D25										

Description

A RAID log is a simple, effective project management tool to organise a project by tracking risks, actions, issues, and decisions in the one log. The right level of detail needs to be determined for the RAID log, dependent upon the project so that it is an effective tool for audits, governance, and oversight of the project. It is a dynamic document that is constantly maintained throughout the project.

How to Use

ID

Give each Risk a unique ID so that it can be tracked easily and cross referenced for example in a Change Request or in an Issue Register. Example: R01, R02, R03...

Date Raised

This is the date the Risk was raised.

Title

This is where you give a title to the Risk, also add why it is considered a risk and provide any impact in the description

Description

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

Probability

Here you rate the probability of the Risk coming to fruition. Rate from One to Five. One being the lower end of the scale

Impact

Here you enter the impact this Risk will have on the project. Rate from One to Five. One being the lower end of the scale

Risk Rating

This is calculated field base on the Probability and Impact ratings you provide for the project. The ratings are Low, Medium, and High

Mitigation

Here you enter the mitigation for the risk. The mitigation is required to stop the Risk from coming to fruition. If the Risk does come to fruition, close the Risk, and raise it as an Issue.

Owner

Here you enter the person's name or Department who owns the risk.

Status

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

Notes

Here you enter the notes in relation to the Risk, 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 – then add note

Date Closed

Here you enter the date the Risk was closed.

Action Register

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.

Issue Register

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.

Decision Register

How to Use

ID

Give each Decision a unique ID so that it can be tracked easily and cross referenced if required in a Change Request or in a Risk or Issue Register. Example: D01, D02 etc...

Date

This is the date the Decision was entered into the Decision Register.

Raised By

This is the name of the person who requested the Decision.

Title

This is where you give a title to the Decision. E.g., Decision required on which version of an application to install

Description

A clear description of the Decision required.

Impact

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

Approved By

This is the name of the Person or body (SteerCo) that has made the decision

Date Approved

Here you enter the date the Decision was made.

Artifact

This is essential, need to have a signed document, or email approval so it can be referenced if required.

Status

Is the Decision still pending, waiting on further up the chain approvals or is it closed, change the status here.

Date Closed

Enter the date the decision 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.g., My Documents\Excel 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.
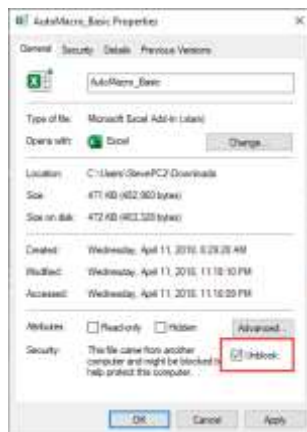
3. **This step in optional as the issue has been resolved in recent updates.**

   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 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
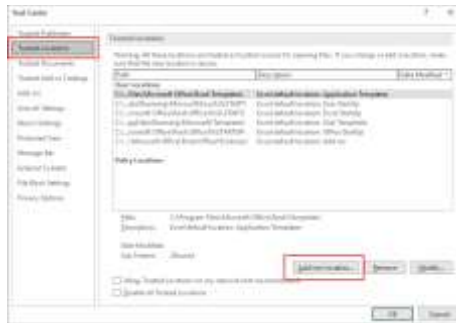
h.

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)
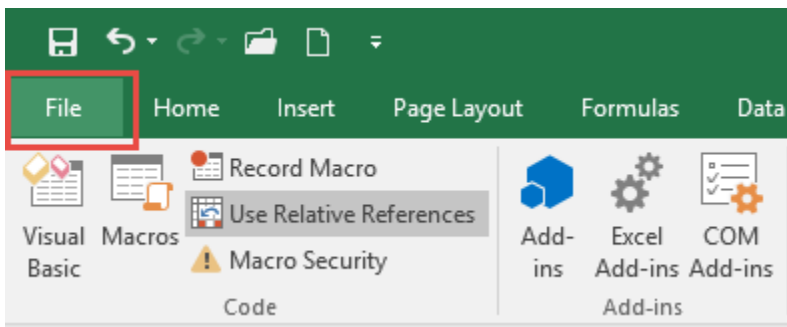
4. Make Sure the Developer Tab is Visible

5.

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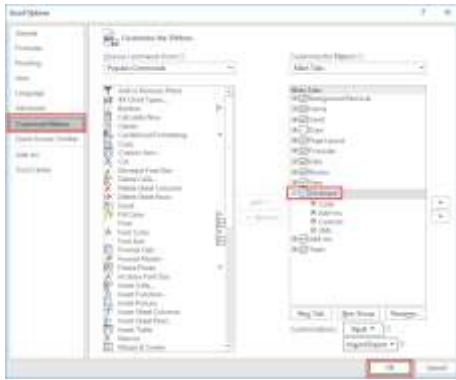
6. Click File as shown below

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\Excel Files)

    b. Once your file appears inside the Add-in Box, ensure you enable the check box per picture below.
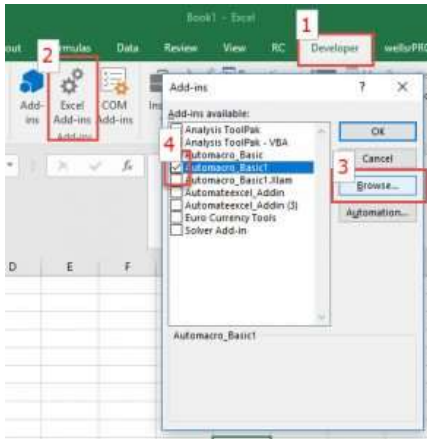
15.

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.