pmo docs

Excel Templates Guides, Description, Download and installation.

SMB Action Register

Project Action Register

Created By pmo docs

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Identifier	Title	Date Raised	Description	Owner	Required Date	Updates	Status	Date Closed
A01	Engage pre sales for schedule review and amendment	16/08/2018	Request to Christine to assign Pre Sales to assist with schedules Oppty# number provided	Project Manager	17/08/2015	Request sent and approved - meeting set up	Open	
A02	Contract signed before end of month	16/08/2018	Contract needs to be sign as we are running up to fire season and may not be able to start the project proper	Client	28/08/2015	Need to follow up with client	Closed	16-Sep
A03	Request for additional resource	13/06/2021	Require additional resouce to complete a Scripting piece in this project	Project Manager	20/06/2021	16/06 - Request submitted to Resource Manager	Pending	
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Description

An action register is a central location 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...

Title

This is where you give a title to the Action

Date Raised

This is the date the Action was raised.

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.

Date Required

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

Updates

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

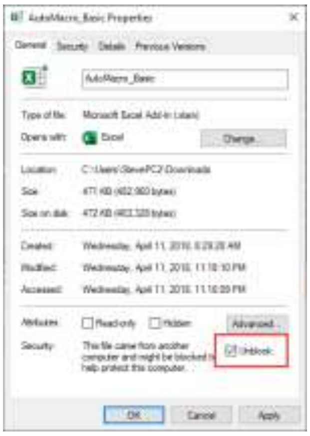
Status

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.

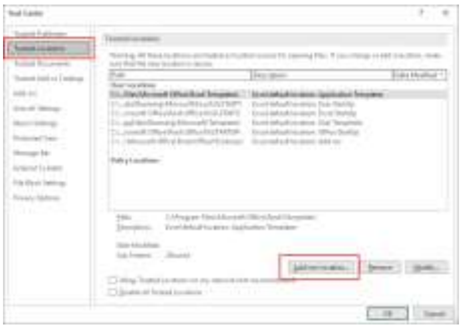
How to install the Excel .xlam file (Add-in)

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 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 for the add-in to work.
    c. Go to File > Options > Trust Centre > Trust Centre Settings… > Trusted Locations > Add New Location
    d. 

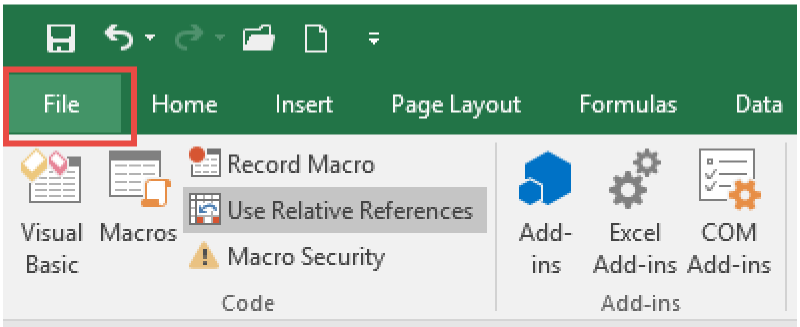
    e. **Trust Center > Trust Center Settings**

f. 

g. Trusted Locations > Add New Location

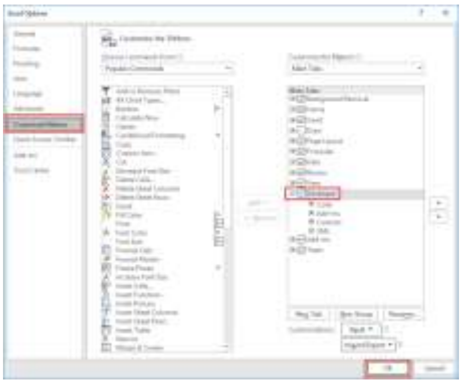
h. 

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)

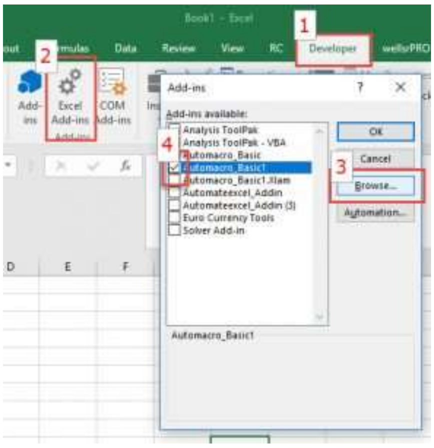
4. Make Sure the Developer Tab is Visible
5. 
   a. If you do not see the Developer Tab, then follow these instructions: Add Developer Ribbon.
6. Click File as shown below
7. 

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.