Excel Templates Guides, Description, Download and installation.

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

RAID Register

RAID Register

Risk Register | Action Register | Issue Register | Decision Register

pmo docs

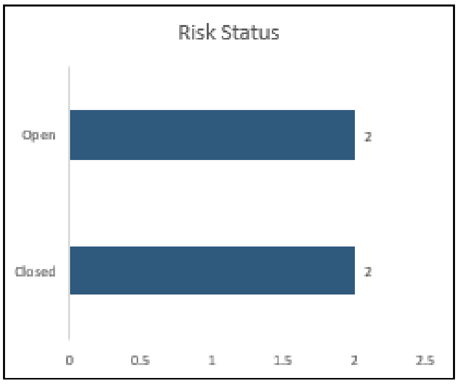
Your Company Name

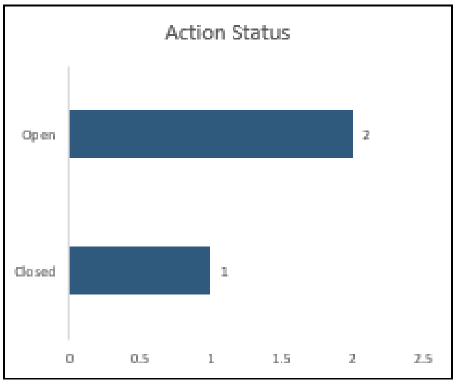
Your company Details

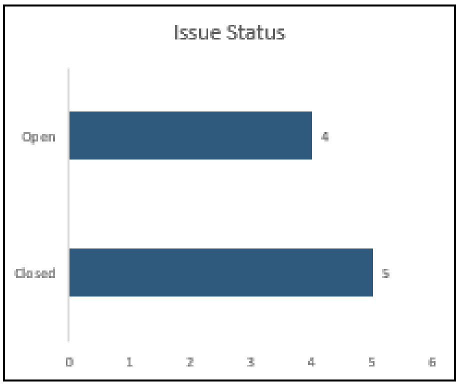
Project Information	
Client Name:	<Fill in Details>
Client Contact:	<Fill in Details>
Project Name:	<Fill in Details>
Project Code:	<Fill in Details>
Project Manager:	<Fill in Details>

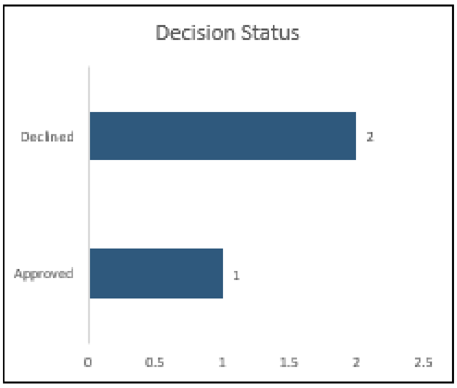
How to use

1. Add your company logo to the cover page
2. Add your company name to the name box
3. Add your company details, address, email and web address
4. Use the LoV tab to add additional items to the drop down list. Just add name to bottom of table it will auto updat
5. Fill in the project details



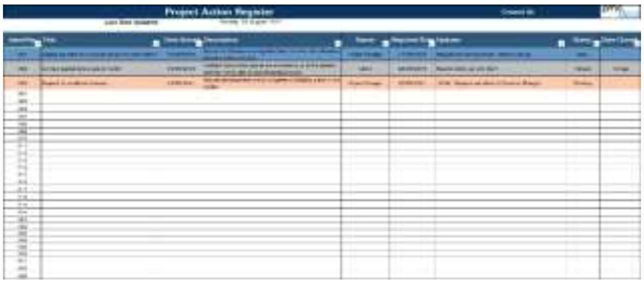






RISK

ACTION



ISSUE

DECISION

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.

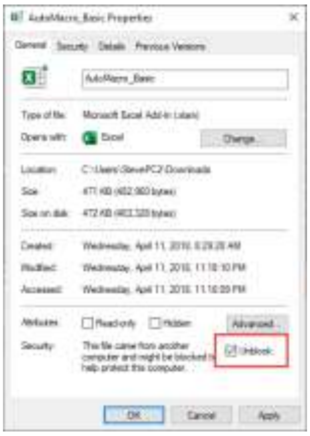
Status

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)

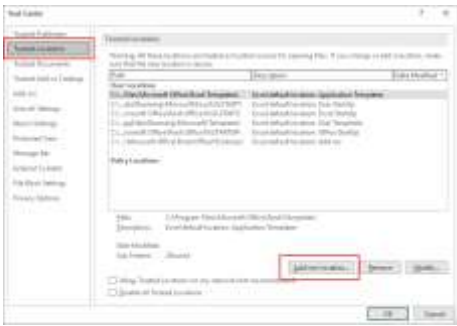
1. Save Add-in to Computer
    a. Make sure to download and save the add-in (.XLAM file) to your computer. Pick a folder that is easy to find (E.g., My Documents\Excel Files)
2. Unblock the File.
    a. After saving the file, locate the file in the Windows Explorer.
    b. Right-click the file and select 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. 

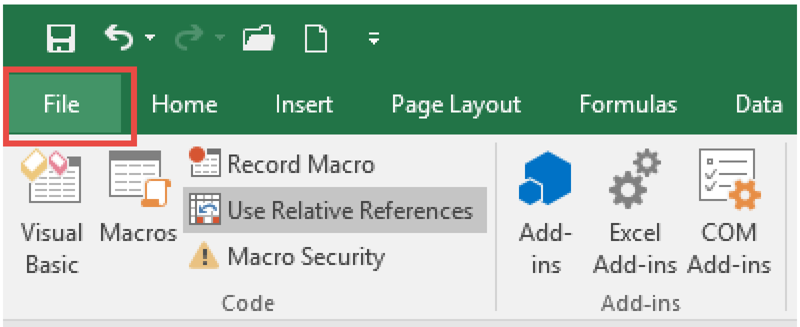
g. Trusted Locations > Add New Location

h. 

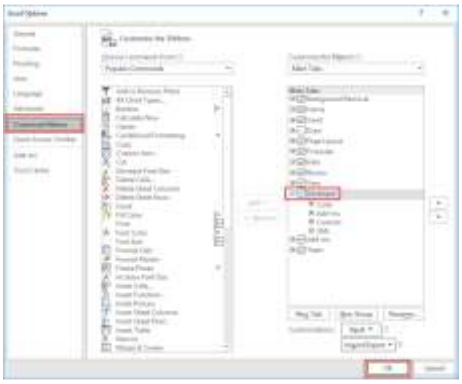
i. Add New Location: Browse to the file location containing your add-in (or you can move your add-in file to one of the existing Trusted Locations)

4. Make Sure the Developer Tab is Visible
5. 

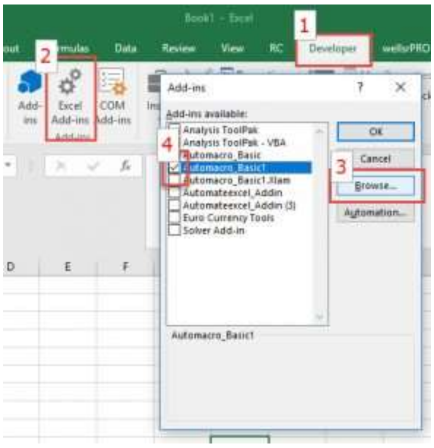
   a. If you do not see the Developer Tab, then follow these instructions: Add Developer Ribbon.

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\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.