

# Creating a Project Status Report

*USER GUIDE*

Office of Management &  
Enterprise Services

Information Services

October 2015



## Overview:

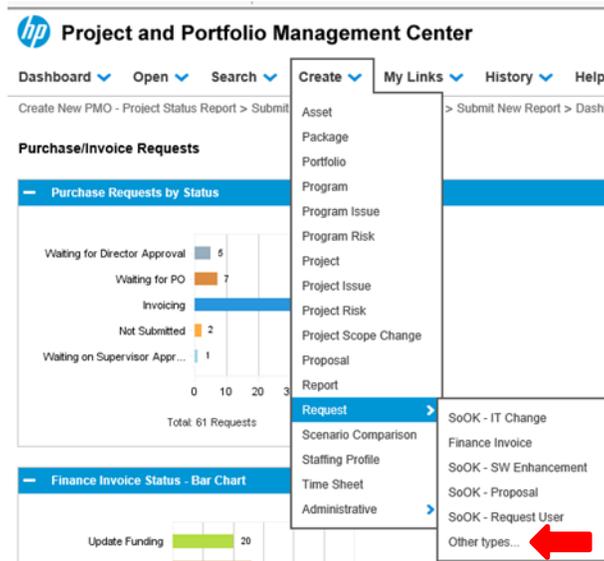
There is a two-step process to creating Project Status Reports:

**Step 1:** Set up the Project Status Report Request; you only need to do this once for each project. In that request, you will update the Project Information Section each week.

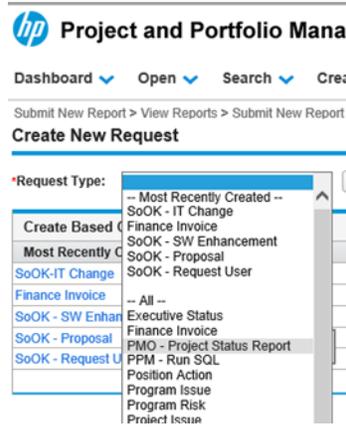
**Step 2:** Set up the Report Schedule; this will pull the information from the Project Status Request created in Step 1, along with the additional information for the issues, risks and scope changes as defined in the report parameters. You can set the report on a schedule to run automatically each week. By selecting **Send Email** and putting the Project Manager's name in the email, the Project Manager will get an email when the report runs with a link to the report. You can click the **View Report** link and it will open up, then you can save the report as a PDF to send out to your Stakeholders.

Project Managers must submit a weekly Project Status Report for each of their projects to their Stakeholders utilizing the PPM Tool Project Status Report.

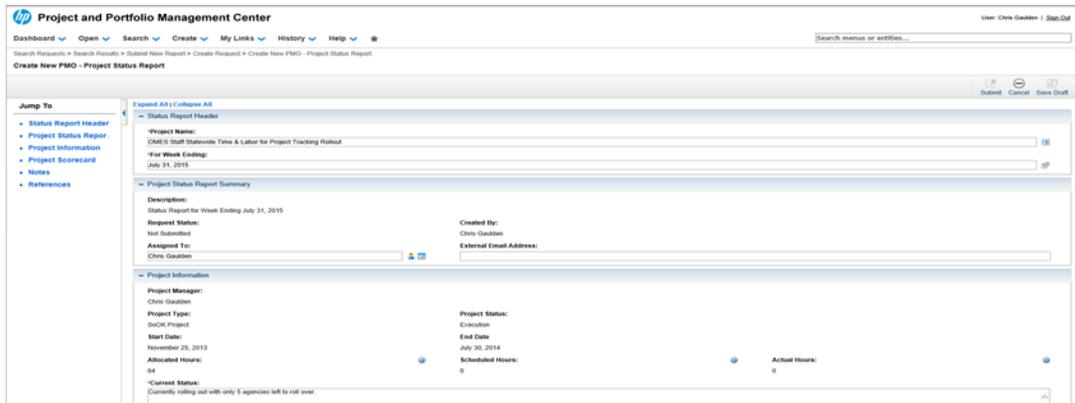
1. While logged into the PPM Tool, click the **Create** tab and select **Request** and **Other types**.



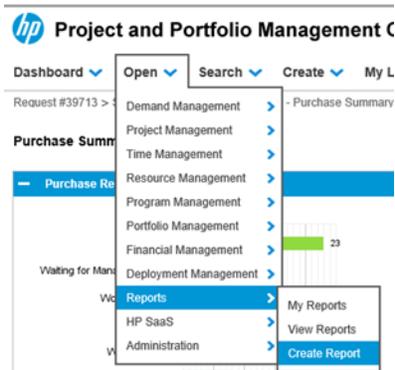
2. Select **PMO – Project Status Report** from the Request Type dropdown and click the **Create** button.



Complete the form and click the **Submit** button.



3. Click the **Open** tab and select **Reports** and then **Create Report**.



4. Select **Project Management** from the Report Category dropdown.

Select Report by Category

Report Category: **Select Category**

- Select Category
- Administrative
- Deployment Management
- Demand Management
- Financial Management
- Portfolio Management
- Program Management
- Project Management**
- Resource Management
- Time Management
- Extension

5. A list of available reports will display. Select **PMO – Project Status Report**.

Select Report by Category

Report Category: **Project Management**

Baseline Comparison Report	Compare current schedule to a Baseline or compare Baselines
Project Cost Breakdown	This Report shows the costs for the Project and the Activities with which the costs are associated. Labor and Non-Labor costs are included in the totals.
Project Cost Details	View Cost Details for a Project
ODOT - Project Status Report	
<b>PMO - Project Status Report</b>	Project Status Report that Captures Work Plan Statistics, Issues, Risks, Scope Changes and the Latest Project Status Narrative
PMO-Project Status Report Short	Project Status Report that Captures Work Plan Statistics, Issues, Risks, Scope Changes and the Latest Project Status Narrative

6. In the window that appears, select the Project Name you submitted and enter your report parameters. Then click the **Submit** button.

**hp Project and Portfolio Management Center**

Submit Report: PMO - Project Status Report

**Submit**

**Report Parameters**

\*Project Name:

\*Risk Statuses:

\*Issue Statuses:

\*Scope Change Statuses:

Include Critical Priority Issues/Risks/Changes?  Yes  No

Include High Priority Issues/Risks/Changes?  Yes  No

Include Normal Priority Issues/Risks/Changes?  Yes  No

Include Low Priority Issues/Risks/Changes?  Yes  No

\*Issues/Risks/Changes Closed in the Last x Weeks:

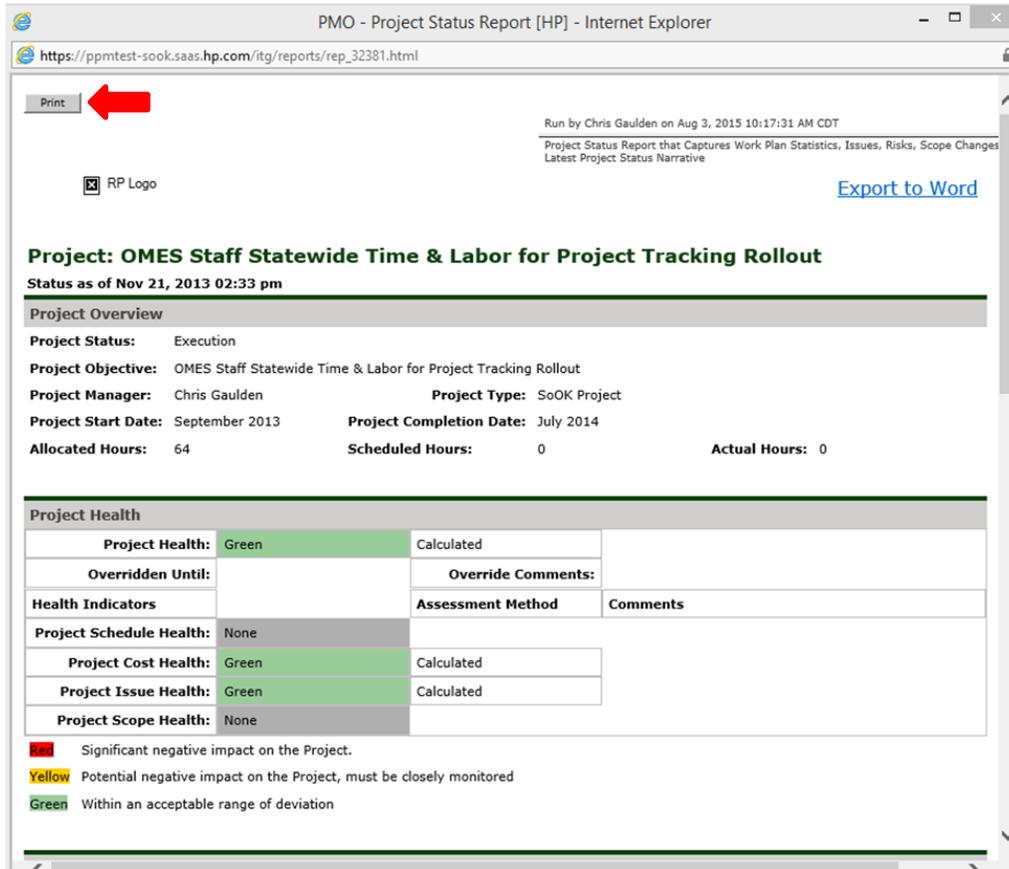
Only Show Major Milestones?  Yes  No

**Scheduling and Output Options**

Run Report Immediately

Run Report On:   Repeat Every  Hours  Until

- Once the report is finished processing, a printout of the report will appear on the screen. Click the **Print** button. Change the Printer Name to **PDFCreator** or **CutePDF Writer** and click the **Print** or **OK** button to save the report as a PDF.



- Email the PDF to the project's Stakeholders and send a carbon copy to the email address, [ISProjectStatus@omes.ok.gov](mailto:ISProjectStatus@omes.ok.gov), as well as upload it to the References section of your project. This must be sent weekly by close of business (COB) Friday.