



Project Management Advanced Diploma



Computers & PM – Josephine Coffey

Computers & PM – Week 3

- Overview of Computers & Project Management
- Guidelines for Procuring PM Software
- **Project Management using MS Office applications**

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PM using MS Office Applications

PM Component	MS Application	Description
Business Case / Project Mandate / Project Brief templates	MS Word & MS Excel	Simple reusable templates in Word & Excel. - Excel for the financials - Project Status reports
Risk Logs	MS Excel	- Calculate Inherent Risk, effect of mitigation/control, Residual Risk - Track progress, actions, ownership
Issue Logs	MS Excel	Same as for Risk Log. - Tracking completion/status of risks that become issues
Project Budgets	MS Excel	- Also use vendor estimates (e.g. via RFP responses)

PM using MS Office Applications

PM Component	MS Application	Description
Project Diaries & Resource Schedules	MS Outlook, MS Excel	For recording events/due dates etc., a spreadsheet can suffice. Also: - MS Outlook allows the simple use of a calendar and also the assignment of tasks (with reminders).
WBS	MS Excel, MS Outlook, MS Visio	Tasks/products can be listed in Excel, MS Outlook again for assignment and reminders

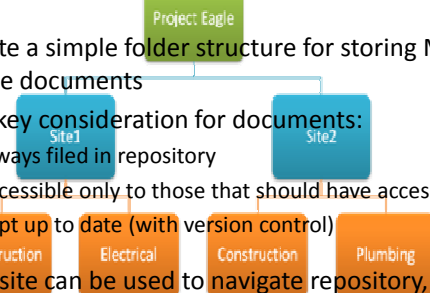
Note: a low cost PM software app may be purchased to use along with MS Office to allow an organisation to learn what it really needs from a PM system.

Level 1: Storage & Location

- **Document repository** - shared, formalised location for the storage or saving of files for a specified purpose
- Consider the organisation's needs:
 - Is Project Integration & Control function required?
 - Are version control procedures required?
 - Organisation's Project/Programme structure

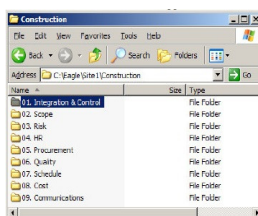
Level 1: Storage & Location

- Create a simple folder structure for storing MS Office documents
- The key consideration for documents:
 - Always filed in repository
 - Accessible only to those that should have access
 - Kept up to date (with version control)
- Website can be used to navigate repository, also Project Intranet used to publish links

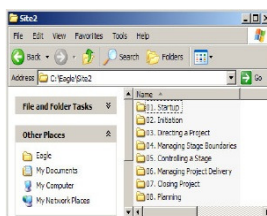


Level 2: Standard folders

Based on PMBOK areas:



Based on PRINCE2 areas:



No difference – you can structure your project share to suit your PM approach, methodology etc

Naming Conventions & Version Control

- Naming convention – files saved in a consistent manner e.g Work breakdown structure for project Eagle...
 - Project Name* - Eagle
 - Sub-project* - Site1
 - Workstream* - Construction
 - File Content* - WBS
 - File type* - XLS (excel)
 - File Name:* - WBS_111023Final_EagleSite1Construction.xls
- Date format YYMMDD – documents sorted by date
- Also Include 'version number' or approval status (Final)
- 'Baseline' maintained using version control

Document Control

- Document Details

Title: Project Plan

Project: Eagle

Version: Signed Off

Date: 23/10/2011

Author: J. Kelly

- Document Version History / Change Control

Document History			
Version	Author/Reviewer	Date	Comments
V1.0	J. Kelly	23/11/11	Initial version
V1.1	J. Kelly	23/01/12	Added more explanations
V1.2	J. Kelly	30/01/12	Final

Approval History			
Version	Approvers	Date	Comments
V1.2	A. Approver	30/01/12	Signed Off

Security & Protection

Security & Protection

- Network permissions: control access rights
- Track Changes: records alterations to files
- Password Protection: restrict opening/altering documents

More Advanced Doc Repositories

- Including MS SharePoint & Lotus Notes

PM Template Review – MS Office

- [Project Business Case](#)
- [Project Plan](#)
- [Risk Log](#)
- Issue Log
- Project Diaries & Project Schedules

PM Template Review – MS Office

- [Project Budgets](#)
- Project Organisation Structures
- [Work Breakdown Structure](#)
- [Highlight Report & Project Status Report](#)

Summary

- Document Repository created based on organisations needs
- Revision & Approval History specified and maintained
- MS Office templates available for most PM components

Questions

- What are the benefits of using PM software?
- What are the common components of a PM tool?
- Discuss the process required to select a PM software product.
- Discuss the storage of project documentation when specific PM software is not being used?