



Portfolio-Engineering
the right projects, done right

Project Log

A Tool for Tracking Chaos

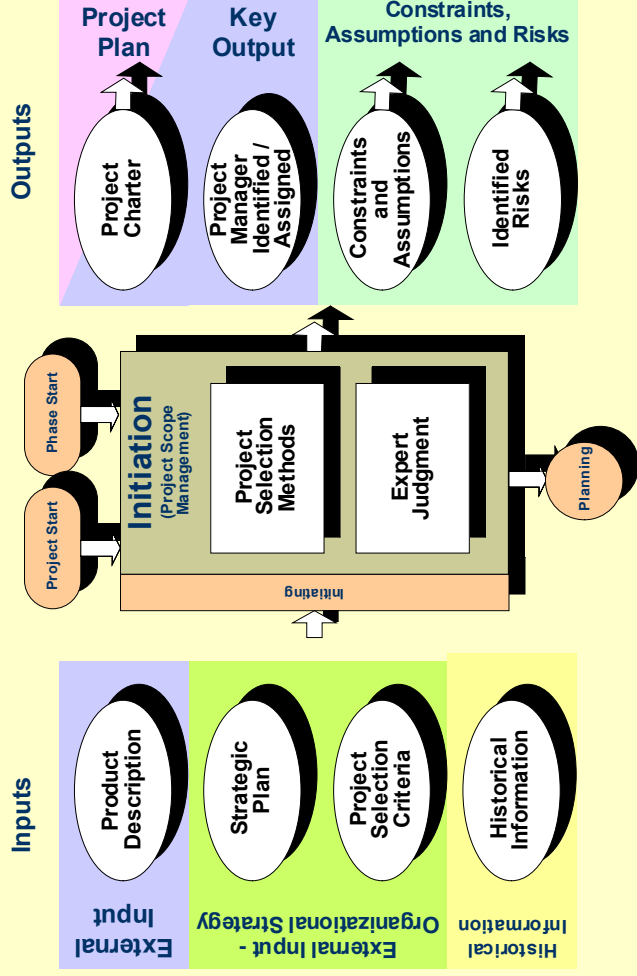
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Project Log

The Chaos Starts Early

The very first project management process, **Initiation**, produces a **Project Charter** which includes:

- **Constraints**
- **Assumptions**
- **Risks**



Project Log

Constraint

A constraint is a pre-defined limit, restriction or regulation that is assigned to a project team from an outside source such as the Project Sponsor or a government agency and is (generally) non-negotiable. Constraints are also generated by the project team as their project approach, estimates and decisions begins to generate limitations on team members or project activities.



Project Log

Assumption

An assumption is a statement that is presumed to be true so that progress can be made in project planning and execution. When a project team are faced with a number of options and require a decision to make progress but cannot access the appropriate responsible parties or do not have enough data to make an informed choice, they may make an assumption about the decision.

It is normal that major project documents such as the Charter or the Plan be accompanied by a number of assumptions on which they are based.



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Identified Risk

Risks are uncertain events that may affect a project in a positive or a negative way. Risks may be characterized as concerns, unknowns, assumptions, matters outside of the project team control (dependencies) and so on.

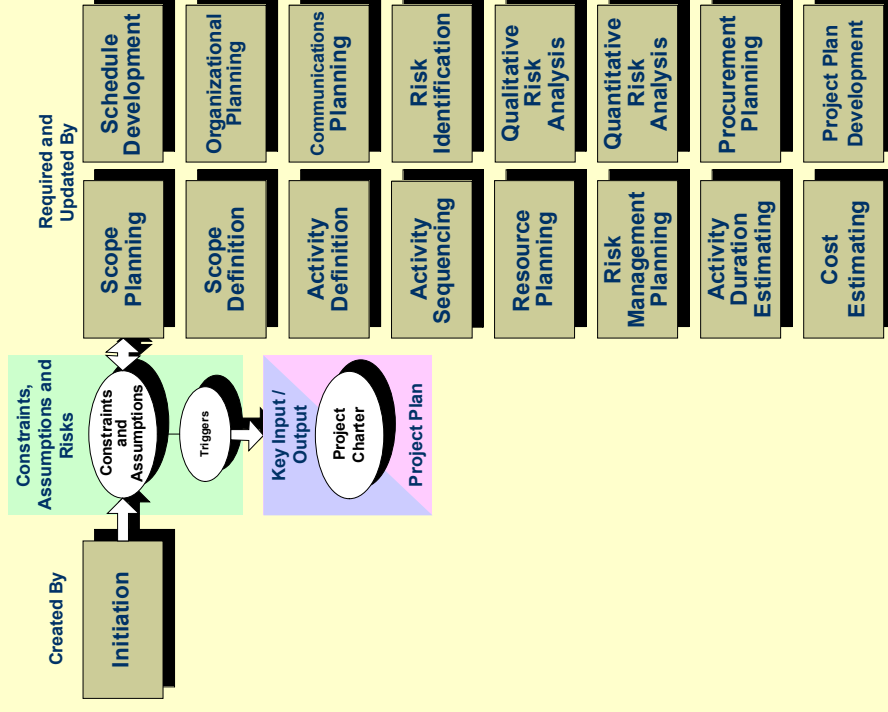
Each identified risk has two major attributes (that may be difficult to qualify or quantify), the probability of occurrence and the potential impact.

Project Log

Chaos Beyond the Charter

Constraints and assumptions continue to multiply after the Charter is approved.

Constraints and assumptions are inputs and/or outputs of 16 additional project management processes!

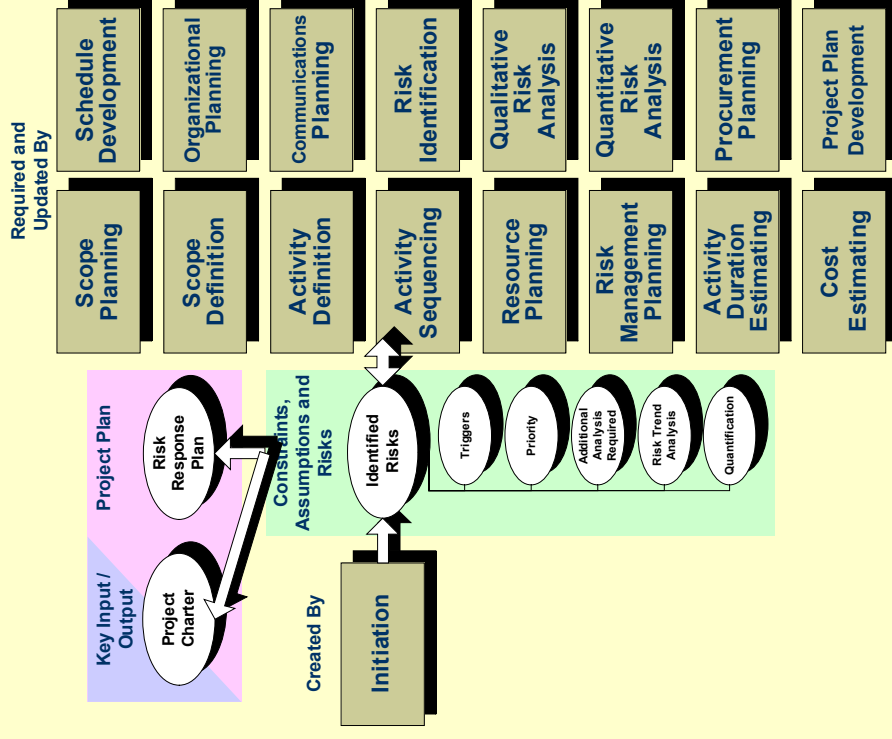


Project Log

Chaos Beyond the Charter

It is the same story over at the risk camp.

Identified risks are inputs and/or outputs of 16 additional project management processes!



Project Log

Action Items

No matter how well you plan and schedule the activities of your project, there are always going to be **high priority activities that dynamically arise**. These relatively small but **critical activities** are called Action Items to emphasize the need to complete them quickly.

A well defined action item includes the required result, a clear assignment of responsibility and a defined time frame in which it is to be completed or the status of the item updated.

Project Log

Issues

Issues are unexpected problems that have arisen during project planning or execution. By their very nature, issues need to be solved to allow for project advancement and completion.

Issues are more vague than Action Items in that they have not yet had responsibilities assigned to them nor can the expected output or result yet be defined. Issues will become Action Items but first they will require additional communication, information gathering and analysis before they can be solved or assigned to a particular party.



Project Log

Notes

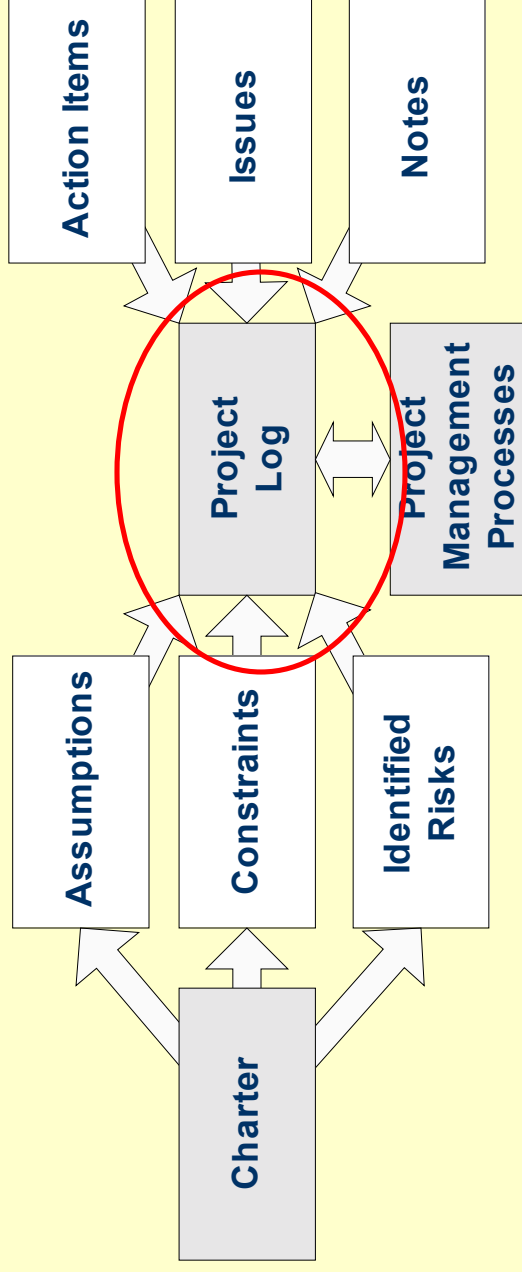
Notes are important facts that will impact future actions or decisions but do not yet have a home to make sure they are easily referenced when required.

Notes need to be maintained and made available for easy reference until they find their way into a permanent project document or record.



Project Log

Managing the Chaos



Instead of an Issue Log, a Risk Log, a Note Book and sorting through Charter and Plan Documents for other details, we recommend the **Project Log** as a **simple, highly functional organizational tool** To manage all items.



Project Log

No.	Type	Classification	Priority	Orig.	Inits.	Description	Resp.	Apprv.	Consult	Inform	Status	Notes
1	Action Item	Architecture	1 - High	4/3	G.B.	Need J.C. to review system architecture	G.B.	J.C.		T.J., R.B.	Open	J.C. vacation till 4/10
2	Risk	3 rd Party Controls	2 - Med	4/4	G.B.	Reports of Beta program not going very smoothly, may delay release of version 1.0	G.B.		R.B.	T.J.	Contingency	Have estimates underway of staying with pervious supplier controls
3	Note	Contact	3 - Low	4/4	G.B.	J.C. vacation contact number				G.B.	N/A	323 432-3224
4	Constraint	Architecture	1 - High	4/7	C.M.	Vendor must have architecture approved by 4/9 due to conference	G.B.				Open	See item 5
5	Action Item	Architecture	1 - High	4/7	G.B.	Contact J.C., get address and courier architecture to vacation spot	G.B.				Closed	Architecture couriered over-night to J.C.
6												
7												
8												
9												
10												
11												

The Project Log is a simple Microsoft Excel spreadsheet.



Project Log

Project Log Columns

No.

Gives each row a unique number for reference.

Type

Dropdown that differentiates between Action Item, Assumption, Risk, Issue, Note and Constraint

Classification

A free-form text entry column for you to be able to group entries by subject in ways that are logical for your project.

No.	Type	Classification	Priority	Orig.	Inits.	Description	Resp.	Apprv.	Consult	Inform	Status	Notes
1	Action Item	Architecture	1-High	4/3	G.B.	Need J.C. to review system	G.B.	J.C.		T.J., R.B.	Open	J.C. review on 4/4
2	Risk	3rd Party Cont'd	2-Med	4/4	G.B.	Review contract for 2nd party	G.B.	R.B.	T.J.		Contingency	4/7
3	Note	Contract	3-Low	4/4	G.B.	J.C. variable contract number			G.B.		N/A	See item 4
4	Assumption	Architecture	1-High	4/7	C.M.	Vendor to be approved by 4/4	G.B.				Open	See item 5
5	Action Item	Architecture	1-High	4/7	G.B.	Contract for 2nd party to be reviewed by 4/4	G.B.				Closed	4/7
6												
7												
8												
9												
10												
11												



Project Log

Project Log Columns

Priority

Dropdown choice of 1 – High, 2 – Med and 3 – Low based on criticality.

Orig. / Inits.

The date the item was originated and the initials of the originator.

Description

A free-form text entry column to describe the item in detail.

No.	Type	Classification	Priority	Orig.	Inits.	Description	Resp.	Apprv.	Consult	Inform	Status	Notes
1	Admin	Architecture	1-High	4/3	G.B.	Need J.C. to review version	G.B.	J.C.		T.J.	Open	J.C. review on 1/18
2	Task	3D FAD	2-Med	4/4	G.B.	Review 3D FAD for 2007	G.B.	R.B.	T.J.	R.B.	Contingency	Review 3D FAD on 1/18 Review 3D FAD on 1/18 Review 3D FAD on 1/18
3	Note	Contract	3-Low	4/4	G.B.	J.C. version number				G.B.	N/A	See item 4
4	Contract	Architecture	1-High	4/7	C.M.	Vendor approval for 2007	G.B.				Open	See item 4
5	Admin	Architecture	1-High	4/7	G.B.	Vendor approval for 2007	G.B.				Closed	Architectural contract on 1/18 Architectural contract on 1/18 Architectural contract on 1/18
6												
7												
8												
9												
10												
11												



Project Log

Project Log Columns

Resp. / Apprv. / Consult / Inform

RACI style section for adding initials of those who will be responsible, need to approve, should be consulted with or informed while following up on this entry.

Status

The current status (many dropdown choices) and date of the latest status change.

Notes

A free-form text entry column to describe information related to the current status – including closure details.

No.	Type	Classification	Priority	Orig.	Init.	Description	Resp.	Apprv.	Consult	Inform	Status	Notes
1	Admin	Architecture	1-High	4/3	G.B.	Need J.C. to review system	G.B.	J.C.	T.J.	R.B.	Open	J.C. review on 4/3
2	Task	3D FAD/2D Cont'd	2-Med	4/4	G.B.	Request for program for 3D rendering of building	G.B.	R.B.	T.J.	R.B.	Contingency	4/7
3	Notes	Contract	3-Low	4/4	G.B.	J.C. review contract number	G.B.		G.B.		N/A	see details
4	Issued	Architecture	1-High	4/7	C.M.	Vendor proposals for site work	G.B.				Open	See item 5
5	Admin	Architecture	1-High	4/7	G.B.	Contract for building site work	G.B.				Closed	4/7
6												
7												
8												
9												
10												
11												

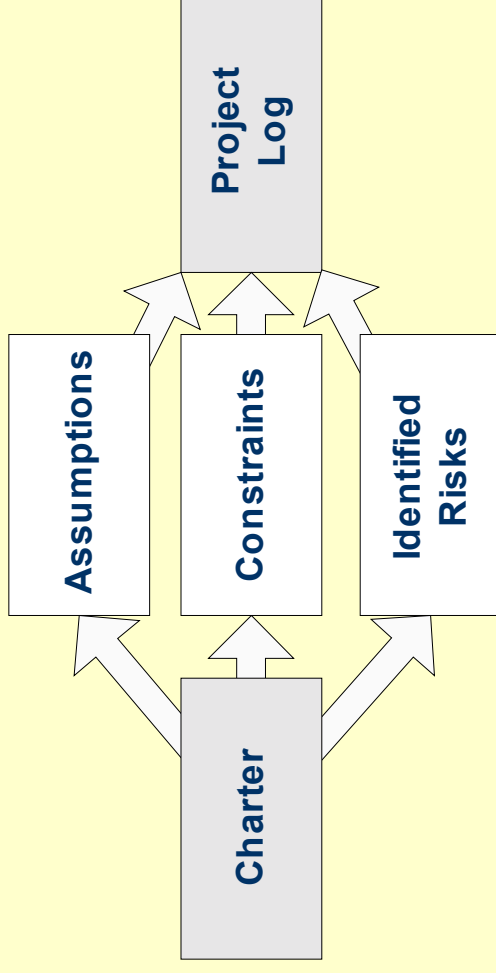


Project Log

Using the Project Log

At the beginning of Project Planning open the Project Log document template and make a copy of it to be used by your Project Team.

Copy all Constraints, Assumptions and Identified Risks from the Project Charter into the Project Log.

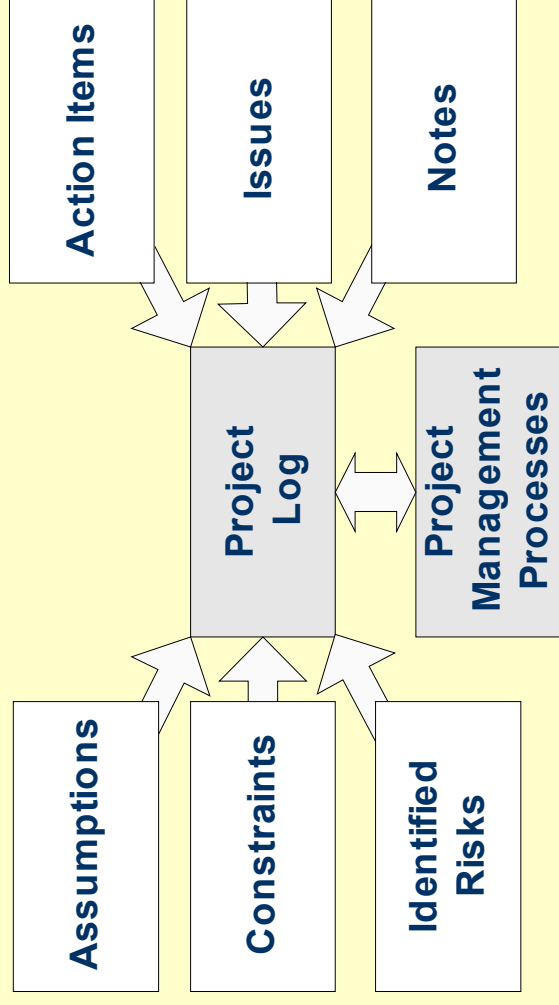


Project Log

Using the Project Log

When new project issues, action items and the like arise, enter them promptly in the Project Log.

When you need to review items, such as during a project status meeting, use Excel's sort feature to order the items appropriately for easy use.



Project Log

Sorting the Project Log

- To sort, click on the empty box just above the row numbers (or press Ctrl-A) to **highlight every cell in the spreadsheet.**
- Click on **Data and Sort** (or Alt-D, S) to bring up the sort function.
- Select the “**My list has header row**” radio button (Alt-R).
- Choose an **appropriate primary and secondary sort criteria** (see next page) and click OK.



Project Log

Sorting and Filtering the Project Log

Primary Sort	Secondary Sort	Additional Sort	Purpose
Priority	Status	None	To review items in progress such as during a status meeting. The high priority items will be displayed first and they will be grouped by the various possible status conditions.
Classification	Priority	Status	To review items relating to a particular subject area - as defined by the project team.
Type	Status	None	To collect the items by Issues, Assumptions and so forth. This can be useful for cutting and pasting from Excel into Microsoft Word to create Status Reports.

Turn on the AutoFilter function (Data, Filter, AutoFilter) to easily filter on any of the column headings.



Project Log

Managing Issues

As swiftly as possible, turn “Open” issues into Action Items. Action Items could include coordinating a meeting for further discussion or analyzing alternatives to prepare to make a decision.

When Action Items have been determined and added to the Project Log, change the status of the Issue to “In Progress” and in the notes refer to the Action Items by reference number.

Continue this process until the Action Items bring a resolution to the Issue. The Issue can then be marked “Closed” .



Project Log

Managing Action Items

Action Items start out as “Unassigned”. Once they have been assigned, update the status to “Open” .

If there is evidence that the Action Item is being addressed, update the status to “In Progress” .

If the responsible party provides an update on the item add the details to the notes column and change the status to “Updated” .

When completed, update the status to “Closed” . After a little time has passed, closed items can be copied to another sheet to remove clutter from the main sheet. Old items should not be deleted. They will be useful during project reviews.



Project Log

Managing Assumptions

Assumptions are recorded with an “Unassigned” status. Once they have been assigned to a responsible party, update the status to “Open” .

The person assigned to an assumption has the job of verifying the accuracy or continued validity of the assumption. If the assumption is verified it gets marked as “Confirmed” which is like “Closed” for assumptions.

If / when the assumption becomes invalid, the status gets updated as “Invalidated” and the priority gets updated to High. An assumption that has not held up is managed as an issue that needs to become a series of Action Items. Action Items may include re-planning.

An assumption that cannot be confirmed for a long period of time is better managed as a risk. An assumption may also be a criteria for change and trigger the change management system.

Project Log

Managing Identified Risks

Risks Assumptions are recorded with an “Unassigned” status. Once they have been assigned to a responsible party, update the status to “Open” .

The person assigned to a risk needs to decide how to handle it. Risks can be:

- Transferred (Out-sourced, insured)
- Mitigated (Reduced in likelihood or impact)
- Accepted (Passively – despite awareness nothing is done)
- Accepted (Actively – contingency or fallback plan is devised and allowed for in schedule and budget)
- Avoided (Approach is changed to avoid risk entirely)

Once the decision is made, the notes column holds the details and the status is updated with the risk response selected.



Project Log

Managing Constraints

Constraints are recorded with an “Unassigned” status. Once they have been assigned to a responsible party, update the status to “Open”.

Constraints are managed like Issues in that they spawn a number of action items. Action Items may include re-planning, adding deadlines to schedules, analyzing the budget, triggering the change management system and so forth.

When the constraint has been reliably acknowledged in the project plan and execution, it can be marked as closed.



Project Log

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