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**State of California**

**Department of Technology**

**IT Project Oversight Framework**

**Project Status Reports – Preparation Instructions**

**Statewide Information Management Manual – Section 45F**

**July 2016**

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## 4.3 Project Status Report Template (Sample)

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### CA - Project Management Methodology Status Reports

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Project Name:   
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_

Click on the section that you would like to complete.

Team Member to PM (for internal project use only)

Executive Project Status Report

Cost Tracking

Milestone Tracking

California Project Management Methodology Reference Manual  
Project Status Report Excerpt  
SIMM 17A Revisions

# CA - Project Management Methodology

## Status Reports

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Project Name:   
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_

Click on the section that you would like to complete.

Team Member to PM (for internal project use only)

Executive Project Status Report

Cost Tracking

Milestone Tracking

### 4.3 Project Status Report Instructions

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The Project Status Report (PSR) (see SIMM 45E) is designed to identify the minimum IT project status reporting from the Team Member, Project Manager, and/or Project Sponsor to other project participants and interested parties for both reportable and delegated IT projects. In addition, the PSR is designed to report Technology Agency-approved IT projects (i.e., those meeting the project reporting criteria as identified in the State Administrative Manual (SAM) Section 4819.37 to the Department of Technology based upon the reporting schedule as described in the Statewide Information Management Manual (SIMM) Section 05A.

Components of the PSR that must be submitted to the Department of Technology for reportable projects in the Excel format (not pdf) include:

- Executive Project Status Report
- Cost Tracking
- Milestone Tracking

Please see SIMM Section 05A for the reporting schedule.

The Team Member to Project Manager template is for internal agency use only and is not submitted to the Department of Technology.

The Status Report templates in the full Toolkit (SIMM 17C) remain, but their use is discontinued. Please always use the Project Status Report extract in SIMM 45E.

### 4.3.1 Status Report Entry Restrictions and Allowances

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*The Project Status Report extract (SIMM 45E) will allow users to expand the row height or column width so that additional information can be reported as needed. It is not necessary to Unprotect the templates; a password is required to do so to prevent the addition or deletion of rows and columns in all but the Milestone Tracking template (the Milestone Tracking template allows unlimited addition of rows). The Project Status Report extract does not allow any changes to formulas.*

*The above restrictions and allowances do not apply to the CA-PMM Toolkit in SIMM 17C, which is discontinued, only to the SIMM 45E Project Status Report extract.*

*The restrictions are designed to ensure that the Executive Status Report, Cost Tracking, and Milestone Tracking templates can be successfully automatically uploaded to the Department of Technology's Project Portfolio Management system and IT Project Tracking web site which is located at [http://www.cio.ca.gov/Government/IT\\_Policy/IT\\_Projects/](http://www.cio.ca.gov/Government/IT_Policy/IT_Projects/). The templates are submitted to the Department of Technology ITPOC; agencies are not required to upload documents to the portfolio system.*

### 4.3.2 Project Status Reporting

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To enable the project team to distribute timely information to stakeholders, regularly scheduled project status reports are developed. A Project Manager needs to focus not only on the current status but also what will take place in the near future. Knowing where a project is supposed to be is a tough question to answer, but essential in assessing how to proceed. Progress reviews often focus on what people *have* been busy doing instead of focusing on where they are, and what *remains* to be done. Project Managers *must* look ahead if they expect to avoid obstacles in their path. Looking ahead is the essence of successful project progress assessment and control.

Project teams need a simple, streamlined method of communicating status reports to various stakeholders throughout the life of a project. Status reports capture four snapshots to facilitate communication and document all project progress:

1. Team Member to Project Manager
2. Executive Project Status Report
3. Cost Tracking
4. Milestones

The Executive Project Status Report, Cost Tracking, and Milestones are submitted to the Department of Technology and are published on the Department of Technology's IT Project Tracking web site. Please see SIMM 05A for reporting schedules.

### 4.3.3 Team Member to Project Manager

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*Please see Section 4.3.1 for template change restrictions and allowances.*

This report is used on a weekly basis by team members to document their activities and identify any outstanding issues that require the team's attention. This report is intended for internal project/state

agency use only and is not submitted to the Department of Technology. The template includes the following information:

- Task or Deliverable – the name of the task or deliverable that is being reported on.
- Scheduled Completion Date – the last approved scheduled completion date.
- Actual Completion Date – the date the task or deliverable is actually completed.
- Issues – describe any open issues regarding this task or deliverable (unanswered questions, differences of opinion, etc.).
- Accomplished This Week – describe any significant work or pieces of work that were done.
- Planned/Scheduled Completion in Next Two Weeks – describe the tasks or deliverables that are scheduled to be completed in the next two weeks.
- Status Summary – provide a yes or no response and an explanation for all “no” responses.
  - Will all assigned tasks be accomplished by their due date?
  - Are there any planned tasks that won’t be completed?
  - Are there problems which affect your ability to accomplish assigned tasks?
  - Do you plan to take time off that is not currently scheduled?
- Status of Assigned Issues
  - Issue Number – unique identification number from the Issue Log
  - Description – provide a brief description of the issue
  - Due Date – provide the date that resolution needs to be in place
  - Status – describe what has been done to resolve the issue thus

Project Name: \_\_\_\_\_  
 OCIO Project #: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Reporting Period: From: \_\_\_\_\_ To: \_\_\_\_\_

Team Member to Project  
 Manager

*For internal project use only*

**Current Task Summary**

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
<b>Accomplished this week</b>			
<b>Planned/Scheduled Completion in Next Two Weeks</b>			
States Summary	Yes?	Explanation	
Will all assigned tasks be accomplished by their due date?			
Are there any planned tasks that won't be completed?			
Are there problems which affect your ability to accomplish assigned tasks?			
Do you plan to take time off that is not currently scheduled?			

**Status of Assigned Issues**

Issue #	Description	Due Date	Status