

Document Template

The Vendor-Free IT Community.



MONTHLY PROJECT MANAGEMENT REPORT

This is an example of a Project Portfolio Management (PPM) summary outlining the status of company projects.

9 Pages 20-1179

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MONTHLY PROJECT MANAGEMENT REPORT

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PROJECT SUMMARY

ACTIVE PROJECT MANAGEMENT LEAD PROJECTS

Project Category	Project Request #	Project Name	% Complete	Project Phase	Project Priority	Hours Reported	Expected Completion Date
Active - Org Level	P-10802	Project 1	50%	Build	1	4,264	
Active - Org Level	P – 14602	Project 2	25%	Design	2	59	
Active - Org Level	P – 14702	Project 3	0%	Initiate	3	52	

PROJECTS – CLOSE PHASE

Project Category	Project Request #	Project Name	% Complete	Project Phase	Project Priority	Hours Reported	Expected Completion Date
(A project in the Close Phase is winding down its execution work; however, it is still active until it has been fully transitioned to production)							

PROJECTS ON HOLD

Project Category	Project Request #	Project Name	% Complete	Project Phase	Project Priority	Hours Reported	Expected Completion Date
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On Hold- Org Level	P-9902	Project 4	25%	Build	4	302	N/A
On Hold- Org Level	P-11701	Project 5	0%	Ideation	6	0	N/A
On Hold- Org Level	P-10803	Project 6	50%	Build	3	364	TBD

PROJECT CHANGES

Project # and Name	Changes
P-10802 Project !	- Updated timeline due to Resource limitations
	-

(Quick Note: Gantt chart and status reports below are using the traffic light effect to represent current status at each milestone and project status. See definitions below)

Colors	Meaning
Red	Behind schedule with little opportunity to catch up, timeline adjustments will be needed
Yellow	Behind schedule but recoverable
Green	On schedule
XXXXXXXXXXXX	Behind schedule with an Unknown timeline TBD

STATUS UPDATES

P-10802 PROJECT INITIATIVE

Status Report (From 5/13 – 6/10)				
Project Name & Project Number: P-10802				
Project Priority:	1	Project Manager:	PM!	
Start Date:	11/19	Project Phase:	Phase 3: Build	
Expected Completion Date:	11/1	Project Hours to Date:	4,264	
Overall Status	Scope	Resources	Schedule	Duration (days):
R	Y	R	R	937
Project Status Summary	<u>High Level Project Update:</u> Update Summary <u>Overall Project Update:</u> No project updates			
Project Accomplishments:	- Enter Text			
Issues:	Critical issues 1. Sample - Resources availability is limited and progress is slowed 2. Most recent test files are 13 months old – may be an unreliable source of information with that large of a gap between testing and live data sets <hr/> -			
Next Steps:	- Review & Validate reports recommended by dept 1 - Review & Validate reports recommended by dept 2 - RACI document to be finalized, shared and accepted with appropriate stakeholders			
Project Timeline (Milestones):	- Reports Completion; 11/26 (complete) - Additional Requested Completion; 1/7 (complete) - System Changes Completion; 2/1 (incomplete) - Toolkit Implementation; 5/31 (incomplete) - Changes Completion; 8/17 (incomplete)			

	<i>*Adjusted Timeline Date per Project Plan documentation</i>
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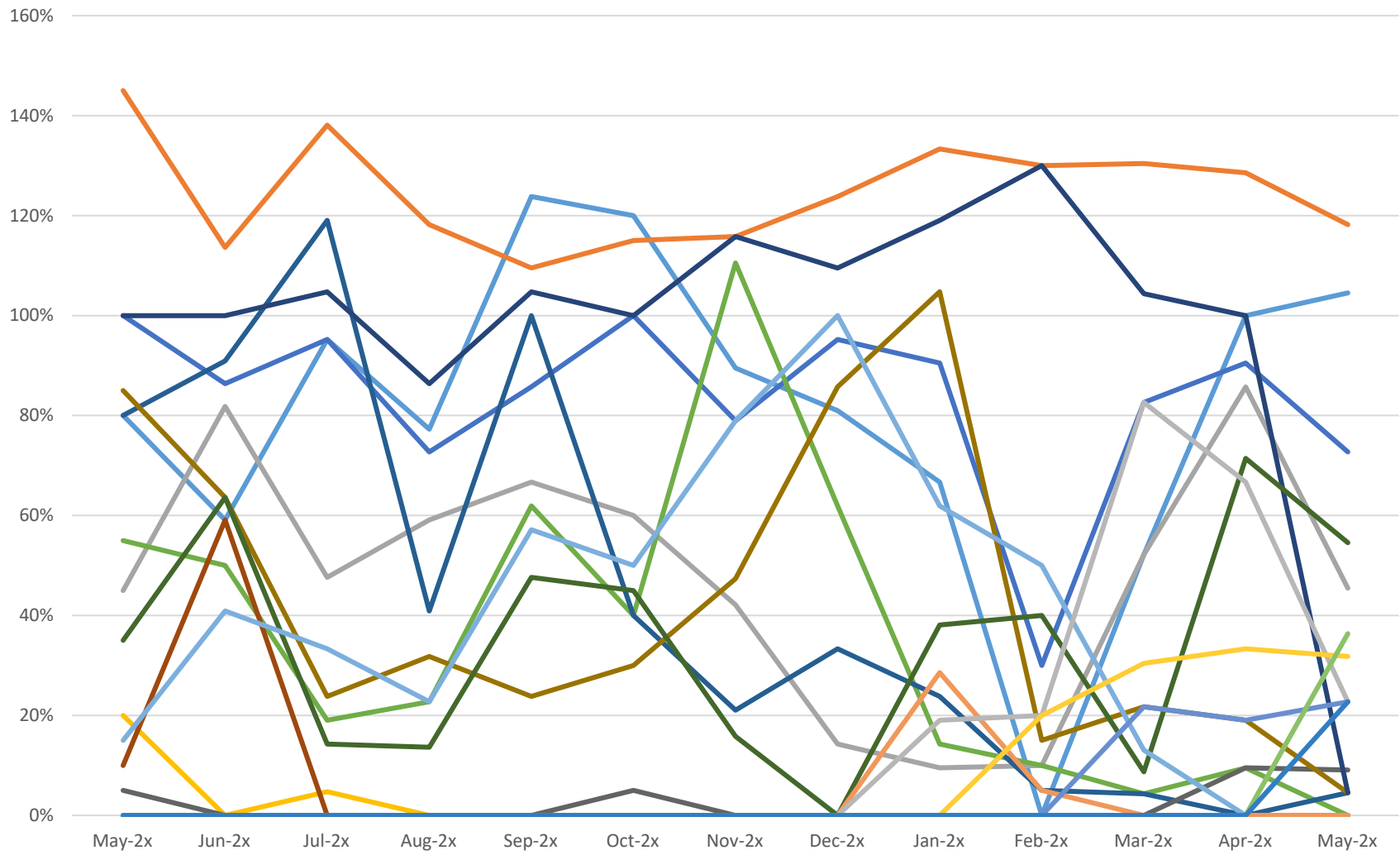
PROJECT 1 INITIATIVES HOURS REPORTED BY FUNCTION

Project	Total Reported Hrs.
Project	4,264
Branch Ops	30
Card Ops	2
Data Analytics	2.5
IT Core	477
IT Infrastructure	4
Lending	368
PMO	3,366
Risk	15

Repeat for each project

WORK INTENSITY IN [year]

12 month Rolling Project View 20xx - 20xx



CURRENT ACTIVE INITIATIVES THROUGHOUT THE ORGANIZATION

most Active Initiatives throughout the Organization

Quarter	Project Status	Task Name	Project Ending	Position	Project Lead	Description/Position Statement	Start	Finish	Term	Project Phase	Jan	Feb	Aug	Sep	Oct	Nov	Dec
10002	Active	Project Name	1-LAOS	Lending			10/1/2022	3/31/2023	20	Phase 2							
10002	Active	Project Name	1-LAOS	Branch			10/1/2022	6/15/2023	20	Phase 1 Initiate							
10002	Active	Project Name	1-LAOS	HR			10/1/2022	9/15/2023	20	Phase 4 Close							
14002	Active	Project Name	1-LAOS	Lending			6/15/2022	7/15/2023	20	Phase 1 Initiate							
11708	Active	Project Name	1-LAOS	Card Ops				7/30/2022	20	Phase 3 Build							
11702	Active	Project Name	1-LAOS	Deposit Ops			1/1/2023	1/1/2023	2	Phase 3 Build							
14702	Active	Project Name	2 - Maintenance (End of Life)	Info Tech			6/15/2022	12/31/2022	7	Phase 1 Initiate							
	Active	Project Name	3 - Regulatory	Accounting			2/15/2023	5/30/2023	2	Phase 2							
12302	Active	Project Name	4 - Departmental	Data Analytics			11/1/2022	7/1/2023	5	Phase 3 Build							
14202	Active	Project Name	4 - Departmental	Facilities			3/15/2023	3/31/2023	28	Phase 2							
14102	Active	Project Name	4 - Departmental	Facilities			3/15/2023	10/15/2023	20	Phase 3							
12101	Active	Project Name	4 - Departmental	Info Tech			11/1/2022	12/15/2022	20	Phase 3 Build							
	Active	Project Name	4 - Departmental	Mortgage			3/15/2023	6/15/2023	20	Phase 1 Initiate							
11801	Active	Project Name	4 - Departmental	Branch Ops			11/1/2022	7/1/2023	20	Phase 1 Initiate							
	Active	Project Name	4 - Departmental	Compliance & Risk			11/1/2022	10/31/2023	20	Phase 1 Initiate							
14002	Active	Project Name	4 - Departmental	HR			11/1/2022	3/31/2023	20	Phase 2							
11704	Active	Project Name	4 - Departmental	Lending / Branch Ops			1/1/2023	1/1/2023	2	Phase 2							
	Active	Project Name	1-LAOS	Mortgage			6/1/2022	3/1/2023	20	Phase 2							
	Active	Project Name	1-LAOS	Lending / Branch Ops			3/1/2022	12/31/2022	20	Phase 1 Initiate							
	Active	Project Name	3 - Regulatory	Card Ops			1/1/2023	8/31/2023	2	Phase 2							
	Active	Project Name	4 - Departmental	Lending			1/1/2023	1/1/2023	2	Phase 1 Initiate							
	Active	Project Name	4 - Departmental	Branch Ops				12/31/2022	2	Phase 3 Build							
	Active	Project Name	4 - Departmental	Marketing			6/15/2022	1/1/2023	2	Phase 1 Initiate							

NUMBER OF PENDING INITIATIVES BY FUNCTION

Departments	20__	20__	20__	Unknown	Total
Department 1	1	2		2	5
Department 2	3	5	3	7	18
Department 3		1		1	2
Department 4				5	5
Department 5	1			1	2
Department 6	2	6		1	9
Total	51	38	12	45	146