Version 3.2 rev b

Quick instruction to Project charter & POP

To get started

The file ”Project Charter & POP” is a macro activated Excel template, which means that you got to have the security level in Excel at ”medium” (in order to be able accept to activate macros), otherwise you cannot use the full potential of the file.

The file is made for Microsoft Office Excel 2007.

All sheets except ”Gantt&MS” are protected, e.g. you cannot write into cells that are not supposed to be edit. It is not possible to change the row height, column width, or cell size. However, most cells adjust to show all text if you write more lines than the original cell size allows for. The cell “Main project objective” on sheet “Proj.Charter” does not adjust, as it is a merge of several cells (limitation in Excel). The sheets “Org.” and “Status” lack dynamic cells.

If you would like to change a protected sheet (e.g. making a cell larger) you have to temporarily remove the protection.

Create a new copy of the file by double-click the template. When a new file is created (and macros are activated) a pop-up window is opened where you are supposed to write general project information and choose which sheets you would like to use. Then click ”OK” and you are asked to choose a name for your new project-file and where to store it. The project name that you have typed in is used as a suggestion for the file name. Preferable you store the file in your project folder.

Now you can start adding information about your project.

Sheets

Show and hide sheets

When you create a new document from the template the most common sheets are chosen, all other sheets are unchecked. If you from the start know which sheets you would like to use, you can mark/unmark the all sheets immediately (see above). If you after some time realize that you need to use a sheets that is hidden, go to the sheets ”Proj.Charter” and click the button ”Open project information and work sheets” (at the top right). Then the pop-up window will open and you can choose which sheets to use.

Proj.Charter

The project information in the sheets header will be filled in automatically. If you would like to change anything you have to open the pop-up window ”Open project information and work sheets”.

Write information about ”Background”, ”Business Objectives”, etc. Note that the ”Flexibility matrix” only must have each alternative ”Time”, ”Cost” and ”Result” once. This selection shall be made together with the Project sponsor to get a guidance of prioritization when there is a conflict between any of them.

Rev.history

Here you note what has been updated between different versions of the document. Hint: save each version of the document by a unique version name, e.g. Project ver 1.0, Project ver 1.1 etc.

Stakeholders

Write Name/Group, Role, and Expectations. Mark if the stakeholder is Result/Realization, Primary/Secondary/Tertiary, and Positive/Neutral/Negative by choosing from the drop-down list in the cell.

Func.str

Here you put your Functional breakdown structure.

The easiest way to edit the SmartArt object is to write and change directly in the list between the figure (it usually becomes visible when you mark the SmartArt object). However if the list doesn’t show click the little box with two arrows (see picture at right).

Del.str

Here you put your Delivery breakdown structure.

The easiest way to edit the SmartArt object is to write and change directly in the list between the figure (it usually becomes visible when you mark the SmartArt object). However if the list doesn’t show click the little box with two arrows (see picture at right).

(WBS) Work Breakdown Structure

Here you put your Work breakdown structure.

The easiest way to edit the SmartArt object is to write and change directly in the list between the figure (it usually becomes visible when you mark the SmartArt object). However if the list doesn’t show click the little box with two arrows (see picture at right).

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Org.

Name all persons of the project organization. If you don't know the name, state the organizational unit or the competence needed by the person.

Resource plan

Star by ”Clear and generate a new sheet”. Note name and role for each project member and who their manager is. For each person you note the time allocated for your project, the time actually spent for the project, and the estimated time needed to complete their tasks in the project.

Com.plan

In the upper part you state primary stakeholders and how you plan to communicate with them.

In the lower part you list how the project internal communication is planned to be. E.g. different types of meetings, reviews, distribution of information etc.

Gantt&MS

Star by giving all activities, milestones, and gates a number and a name. Also choose from the drop-down list in column ”Type” what type it is. State the number of calendar days (work days + weekend days) for each activity. **Note**: milestones and gates must have duration 0. Note the start date (in the format 2010-07-31) for the activity, milestone, or gate. The end date is automatically calculated by the duration. If you set the start date to the value of another activity's and date, the activities will be related. E.g. in cell ”F18” you write ”=G17+1”.

Click on ”Update chart” to update the Gantt-chart at the right.

Click on “Hide/Show additional information” if you would like to hide or show column H-L.

Adjust print area (see excel manual) if any part of the time plan is missing when printing the sheet.

Risks

Here you put all identified risks including probability and consequence.

Note: List all risks without any empty rows between them. Then the drop-down menus at the next sheet will work.

(risk)Actions

Choose which risk that needs a measure by choosing from the drop-down list in the cells of column ”Risk description”. Note the suggested measure, cost for it, and if it shall be realized. Don't forget to update probability and consequence at previous sheet for each risk.

Budget

Before the project gets the budget approved, use the column ”Prognosis today->End” for the estimated budget. When the project gets its budget approved (at G3), move it to ”Budget Original (at Start)”. If the project later on gets a revised approved budget this shall be placed under ”Budget Actual agreed”. NOTE! The original budget shall be left as it was.

At reporting note what the project should have used (according to agreed budget) until today under ”Budget Start->today”. The actual outcome is noted under ”Actual Start->today”. Under ”Prognosis today->End” note the estimated remaining cost/hours in order to complete the project.

Status

At the top you note news and important results. Under ”Status & Prognosis“ you note deviations from the plan considering Project Objectives and human resources. Budget and Result/Prognosis for cost and human resources are automatically copied from the ”Budget” sheet. If that sheet is not used and you would like to write these values manually the sheet protection must be removed. Important milestones and major risks shall also be listed. Finalize by describing main activities that are planned and any other comments or need for support.

To do

Here you note and follow up actions/issues.

Decision log

Here you note internal project decisions.

Change log

Here you note formal changes of the project, which will affect the project charter (time, cost, project objectives). These decisions must be made by the sponsor.

Advanced – to change the template

To change the template you must use the right button of the mouse (right-click) and choose ”Open”.

If you would like a sheet to be hidden as default, e.g. not being visible when a new document is created, you right-click at the sheets tag (at the bottom) and choose ”Hide” in the menu.
If you would like a sheet to be visible as default, you right-click at the sheets tag (at the bottom) and choose ”Show” in the menu. Then you choose sheet and press OK.

When you open the template another sheet called ”Admin” is shown. In this sheet you can change the names for different choices in the drop-down menus. **Note:** You cannot add or move choices, but only change the name in an existing cell.