**PROJECT WEEKLY STATUS REPORT**

1. **SCOPE**

This Quality Work Instruction (QWI) defines the Enterprise Project Management Office (EPMO) procedure to review, assess and document progress on Information Technology (IT) Projects within the [0300-0300-005-B PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open).

1. **OWNER**
   1. The Enterprise Project Management Office (EPMO) Director owns this procedure. No changes, additions or alterations may be made without the owner’s written approval.
2. **REFERENCE DOCUMENTS**

|  |  |
| --- | --- |
| **DOCUMENT IDENTIFICATION** | **DOCUMENT TITLE** |
| [EPMO RECORDS PER CHAPTER 121 & 132](http://stateschedules.ncdcr.gov/Schedules/Office%20of%20the%20Governor/Office%20of%20Information%20Technology%20Services/Enterprise%20Technology%20Project%20Management%20Office/GovOff_EnterpriseTechProjMgn.pdf) | PROGRAM RECORDS RETENTION & DISPOSTION SCHEDULE |
| 0100-0800-010-B | **FORMS AND RECORDS CONTROL** |
| 0300-0300-005-B | [PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open) |
| 0800-0800-005-B | [QUALITY ASSURANCE PROCESS](https://it.nc.gov/media/307/open) |
| 0810-0810-005-B | [QUALITY CONTROL PROCESS](https://it.nc.gov/media/308/open) |

1. **ASSOCIATED FORMS**

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| --- | --- |
| **FORMS IDENTIFICATION** | **FORM TITLE** |
| 0300-0370-005-D | [PROJECT WEEKLY STATUS REPORT](https://it.nc.gov/media/1033/open) |
| 0810-0810-005-D | [QUALITY CONTROL DECISION POINTS](https://it.nc.gov/media/309/open) |

1. **DEFINITIONS**

* NONE

1. **PROCEDURE**
   1. The Project Manager (PM) uses the Touchdown System to create the Project Weekly Status Report. The PM will complete the report prior to close of business on Friday of each week. The Project Weekly Status Report is not required for the ‘Lite” project type. *The PM will complete the report prior to close of business on Thursday if Friday is a holiday.*

**NOTE**: *The Project Weekly Status Report is completed as a project detail page in the Touchdown System, but these forms can be used by Project Managers as a template.*

* 1. In the project schedule (plan), the PM updates the project schedule (plan), the percent of work complete for scheduled tasks, and start/end dates as required.
  2. The PM enters project assessment date, which is typically the Friday when the weekly status report is completed.
  3. The PM lists accomplishments for the current reporting period, and plans for the next reporting period.
  4. The PM assesses the overall project performance as red/yellow/green and provides a summary justification in the PM Assessment block.
  5. When the indicator for Cost Performance and/or Schedule Performance is “red”, “yellow” or “blue, or there is a Scope variance, the PM will identify the Root Cause Category and provide a summary explanation in Root Cause Explanation block.
  6. When the indicator for Cost Performance and/or Schedule Performance is “red” or “yellow” or there is a Scope variance, the PM will identify the Corrective Action Plan to get the indicator(s) back to “green”.
  7. The External Actual Costs will be entered automatically from the North Carolina Accounting System (NCAS) or the SAP Financial System.
  8. For agencies using NCAS, the PM will enter the Agency Personnel Actual Costs. This is the lifetime to date total.
  9. The PM will review any issues and risks and update as needed.
  10. The Project Management Advisor (PMA) reviews the updated project schedule(plan) and Project Weekly Status Report by close of business the following Monday, or close of business on the next business day if Friday and/or Monday is a holiday. The PMA assesses the overall project performance as red/yellow/green and provides a summary justification in the PMA Assessment block.
  11. The EPMO will archive the completed [0300-0370-005-D PROJECT WEEKLY STATUS REPORT](https://it.nc.gov/media/1033/open) in the EPMO Records Center.

1. **RECORDS**
   1. Unless otherwise specified in this procedure, Records shall be maintained in accordance **with 0100-0800-010-B FORMS AND RECORDS CONTROL**.
2. **REASON FOR CHANGE**
   1. Change EPMO Manager to EPMO Director.
   2. Added input on project assessment date.
   3. Added new fields, Root Cause and Root Cause Explanation.
   4. Added External Actual Costs explanation.
   5. Added Agency Personnel Actual Costs explanation.
   6. Change Weekly Status Report to be stored in the EPMO Records Center.
   7. Added Corrective Action Plan explanation.