Planning Gate Review and Approval

Project: Name

Document Date: March 24, 2025

INSTRUCTIONS

This is a Word Template provided by Altus to help you begin your journey of using Altus for Word.

Please feel free to edit this template and then get users to use this as a starting point when creating a document that meets your organisational need.

Some out-of-the-box Altus fields have already been connected to this document, so all you need to do is connect this document to your project and click **Update Data**. For instructions on how to do this, please see below.

This document contains the following:

* Green highlighted sections: indicate areas of the document that need to be entered manually and cannot be connected to data directly from Altus.
* Grey text: data from Altus that will be updated on Updates.

Pre-requisite:

If you haven’t already read the Altus for Word documentation, please take the time to do so now:

* Have Altus for Word Add-in installed; if you need to instal it, please read [this section in Altus docs](https://docs.altus.pro/solutions/AltusForWord/Index.html#installation).
* Have Altus for Word button in Microsoft Word Home toolbar; if you do not have it, please read [this section of Altus docs](https://docs.altus.pro/solutions/AltusForWord/Help.html#adding-the-altus-for-word-add-in-to-word).

How to proceed next:

1. Connect the Word document to Altus. To learn how to get started with connecting this document to an Altus Project please read [this section of Altus docs](https://docs.altus.pro/solutions/AltusForWord/Help.html#adding-the-altus-for-word-add-in-to-word).
2. Edit the Word document to add text and data from Altus. To learn how to add fields from your Altus record to this document please read this [section of Altus docs](https://docs.altus.pro/solutions/AltusForWord/Help.html#inserting-project-data-into-your-word-document).

Planning Gate Review and Approval

This document has been created with all the findings of the analysis of the Planning Phase of the project and has been created for gate review and approval.

|  |  |
| --- | --- |
| Project Name: | Name |
| Project Sponsor: | Sponsor |
| Project Manager: | Project Manager |
| Issue Date: |  |
| Author: |  |

Reviewed By

|  |  |  |
| --- | --- | --- |
| Reviewer Name | Role | Date |
|  |  |  |
|  |  |  |

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Author | Revision Details |
|  |  |  |  |
|  |  |  |  |

Document Approval

|  |  |  |
| --- | --- | --- |
| Approver Name | Approver Title/Role | |
| [Name] | [Role] | |
| **Signature:** | | **Date:** |

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# Project Performance

## Planning Stage Gate Checklist

Enter a summary here of how the project has measured up against the deliverables and benefits.

|  |  |
| --- | --- |
| Current Stage | Current Stage |
| Scope and Schedule | Scope and schedule |
| Target Finish Date | Target Finish |

## Estimated Timeframe

|  |  |
| --- | --- |
| Project Start | Start Date |
| Baseline Project Start | Baseline Start |
| Project Finish | Finish Date |
| Baseline Project Finish | Baseline Finish |

## Project Progress

The following project effort has been recorded as part of the project:

|  |  |
| --- | --- |
| Baseline Total Effort (hours) | Baseline Effort (Hours) |
| Forecast Total Effort (hours) | Effort (Total) |
| Variance (hours) | Effort Variance (Hours) |
|  |  |
| Effort Completed (hours) | Effort Completed |
| Effort Remaining (hours) | Effort Remaining |
| Project % Complete | % Complete % |

## Project Finances

The following project finances were completed as part of the project:

|  |  |
| --- | --- |
| Project Budget | Financials: Total Budget |
| Project Forecast | Financials: Total Forecast |
| Project Actual Spend | Financials: Total Actual |

## Status Update History

The following Status Updates have been recorded for this project:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Status Date | Project KPI | Deliverables KPI | Schedule KPI | Financials KPI | Work KPI | Issues KPI | Risks KPI | Change Requests KPI |
|  |  |  |  |  |  |  |  |  |

# Project Registers

## Change Requests

The following Change Requests have been raised for this project:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ID | Name | Priority | Assigned To | Category | Due Date | Status Reason |
|  |  |  |  |  |  |  |

## Project Deliverables

The following project deliverables are included in this project:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ID | Name | Category | Assigned To | Due Date | Status Reason |
|  |  |  |  |  |  |

## Project Decisions

The following project decisions were recorded as part of this project:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Category | Assigned To | Due Date | Priority | Status Reason |
|  |  |  |  |  |  |

## Risks

The following risks have been raised for this project:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ID | Name | Assigned To | Due Date | Risk Score | Category | Status Reason |
|  |  |  |  |  |  |  |

## Issues

The following issues have been raised for this project:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ID | Name | Description | Assigned To | Due Date | Priority | Status Reason |
|  |  |  |  |  |  |  |

## Benefits

The following benefits have been associated with this project:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Name | Description | Goal | Department | Sponsor | Start | Finish |
|  |  |  |  |  |  |  |