

Project Reports and the PMBOK

One of the less well understood parts of the *PMBOK® Guide* since the 5th Edition has been the significant refinement in the way project data is transformed into useful project reports; mainly due to the way information is distributed in the *PMBOK*. This short article will map the flow.

The starting point is the flow of **Project Information**:

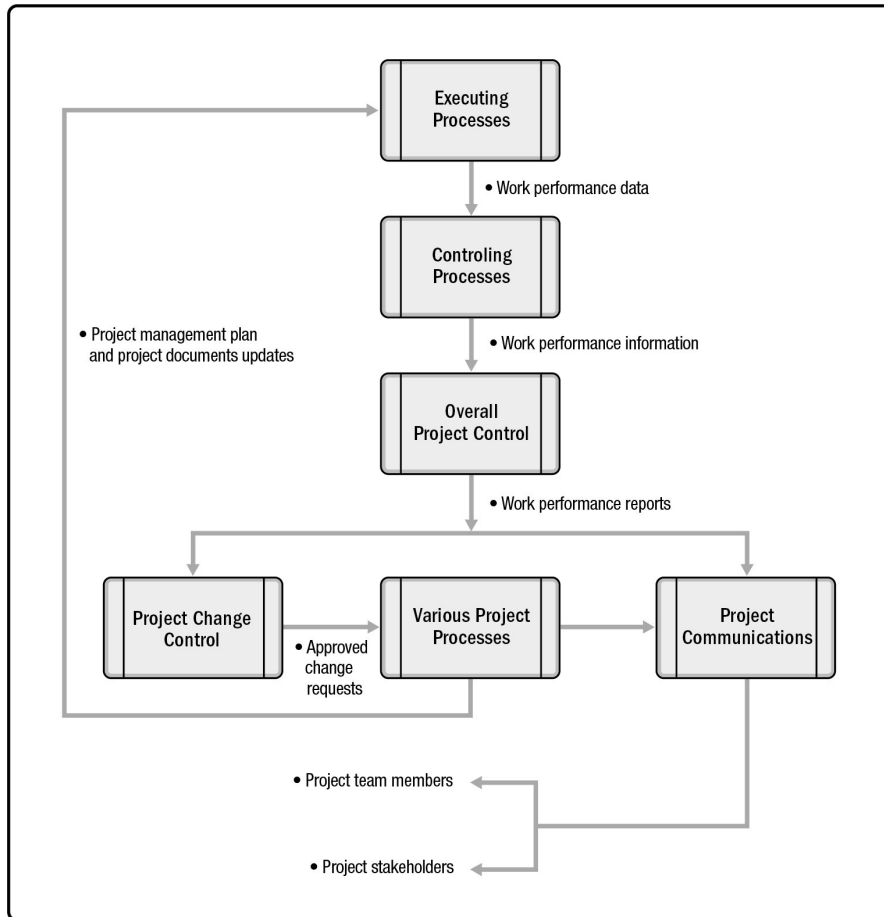


Figure 1-7 (Guide). Project Data, Information, and Report Flow

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This diagram recognises information changes in character as it is processed:

- Work performance data is the raw observations and measurements made during the execution of the project work. Data has little direct value.
- Work performance information is created when the data is analysed and assessed. Information is created by the analysis of the work performance data in context with what was planned and other management intentions. The resulting information is used to help control the work, and also forms the basis of project reports.

- Work performance reports are the physical or electronic representation of work performance information compiled in project documents and used for project decision making.
- Work performance reports are also distributed or made available through the project communication processes with the intention of influencing and informing the actions of stakeholders (both internal and external).

This overall flow is defined in more detail in each of the PMBOK's knowledge areas.

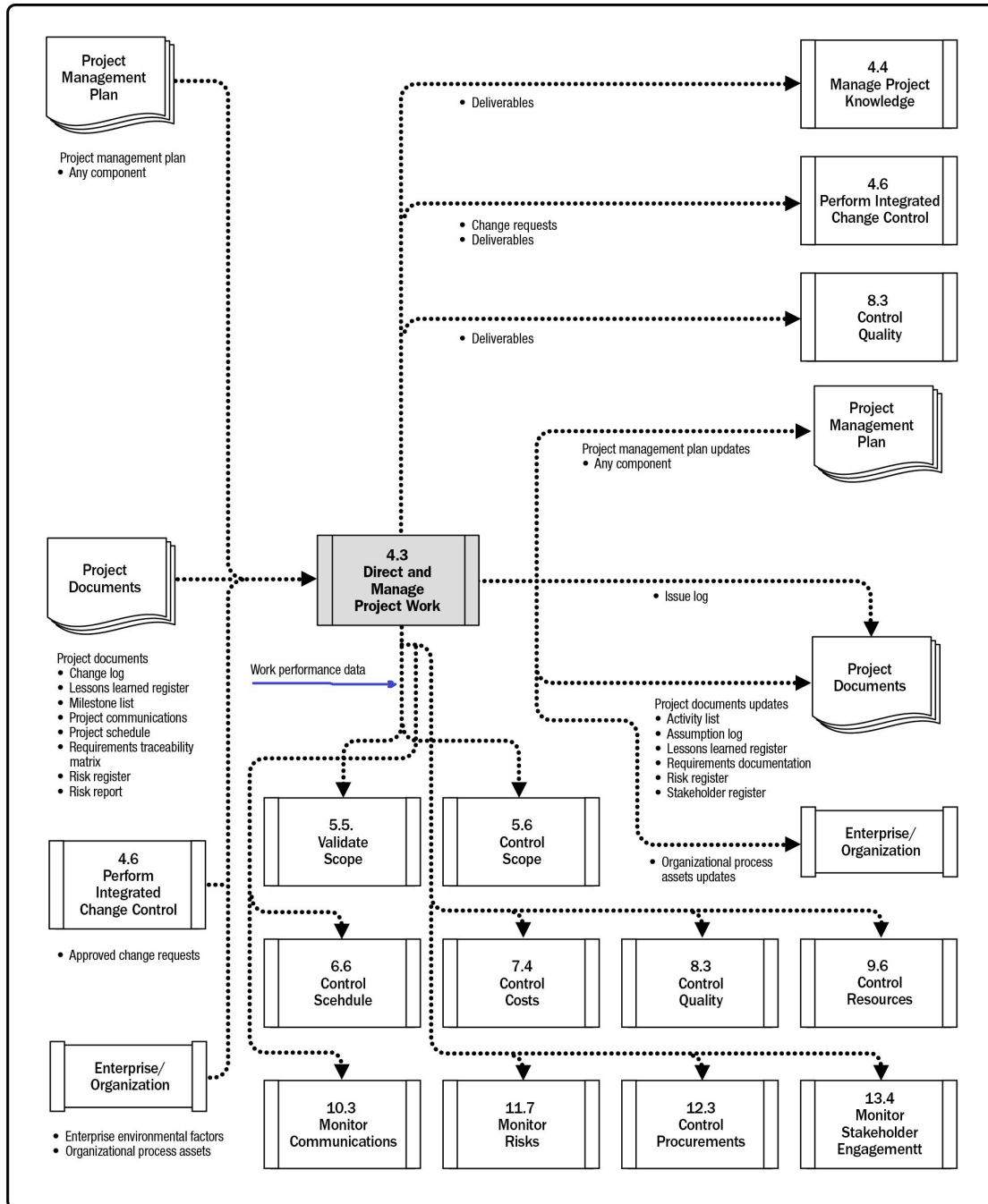


Figure 4-7 (Guide). Direct and Manage Project Work: Data Flow Diagram

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The performance of project activities and work creates ‘work performance data’. This is primarily the function of process **4.3 Direct and Manage Project work**, but other processes also create ‘work performance data’. This data is transferred to the relevant controlling processes for analysis.

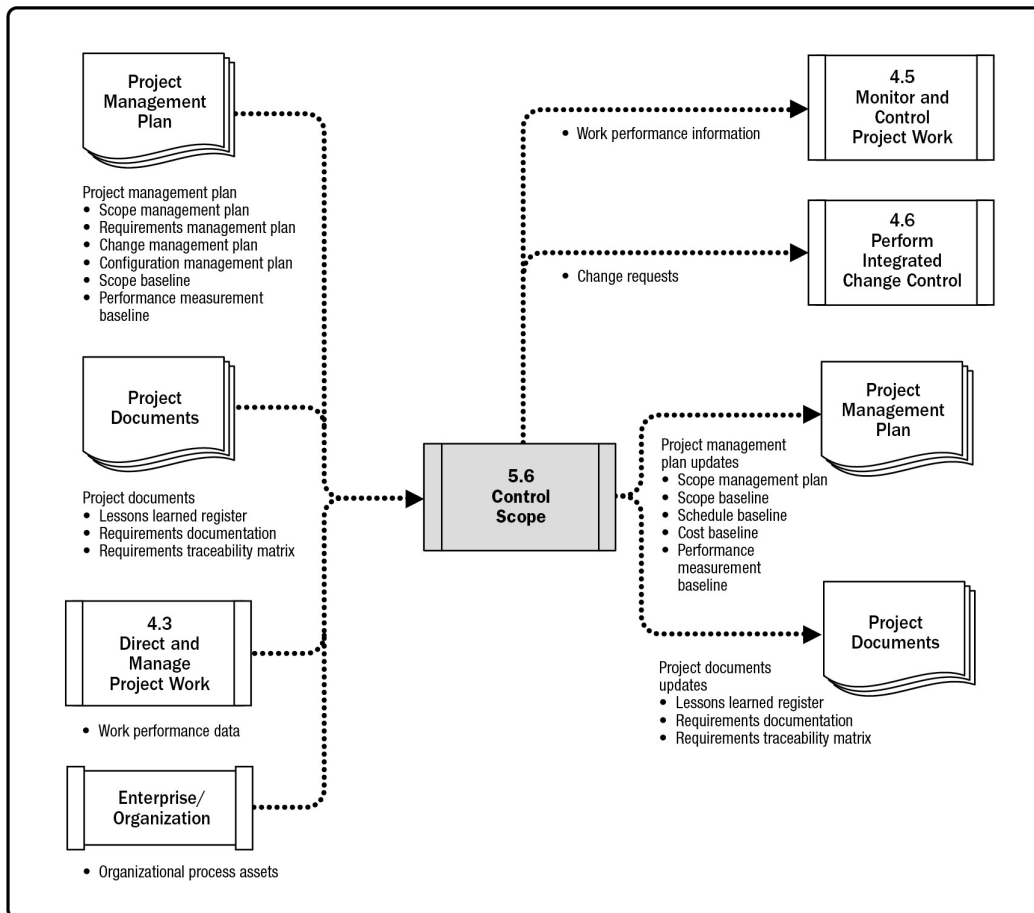


Figure 5-18 (Guide). Control Scope: Data Flow Diagram

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In each knowledge area, the monitoring and controlling process, in this example **5.6 Control Scope**, analyses and assesses the data in the context of what was planned and expected¹. The resulting information is used to help control the work and is consolidated to form the project reports.

These nine sets of specific work performance information pertaining to scope, time, cost, etc., are brought together in process **4.5 Monitor and Control Project Work**, to produce work performance reports as an output. The consolidated information in these reports has a number of uses:

- The information is of course used for internal project management purposes.
- It also forms a key element of the project’s stakeholder communication (see below).

¹ For more on **converting data into information** see: https://www.mosaicprojects.com.au/Mag_Articles/SA1054_Data_to_Wisdom.pdf

- Another key element within this process is knowledge management, the gathering and using of lessons learned within the project and the wider organisation; this aspect is discussed in our White Paper: Lessons Learned².
- Providing an audit trail of the project’s progress for archiving in the organisation’s process assets.

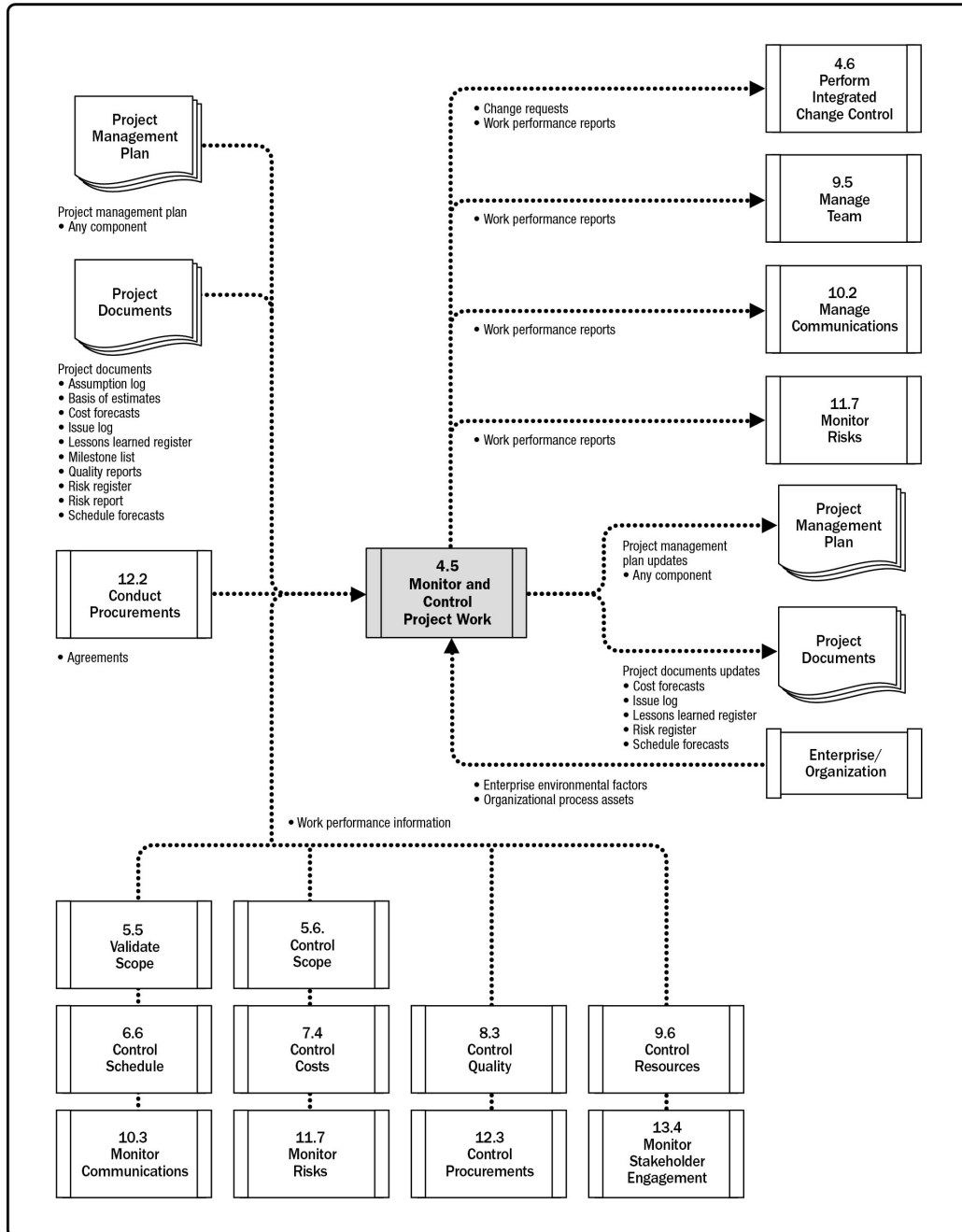


Figure 4-11 (Guide). Monitor and Control Project Work: Data Flow Diagram

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² For more on **Lessons Learned** see:

https://www.mosaicprojects.com.au/WhitePapers/WP1004_Lessons_Learned.pdf



Process **10.2 Manage Communications** receives the work performance reports as an input, and uses communication technology, models and methods to create, disseminate, store and ultimately dispose of performance reports and other project communications developed from the information contained in the reports.

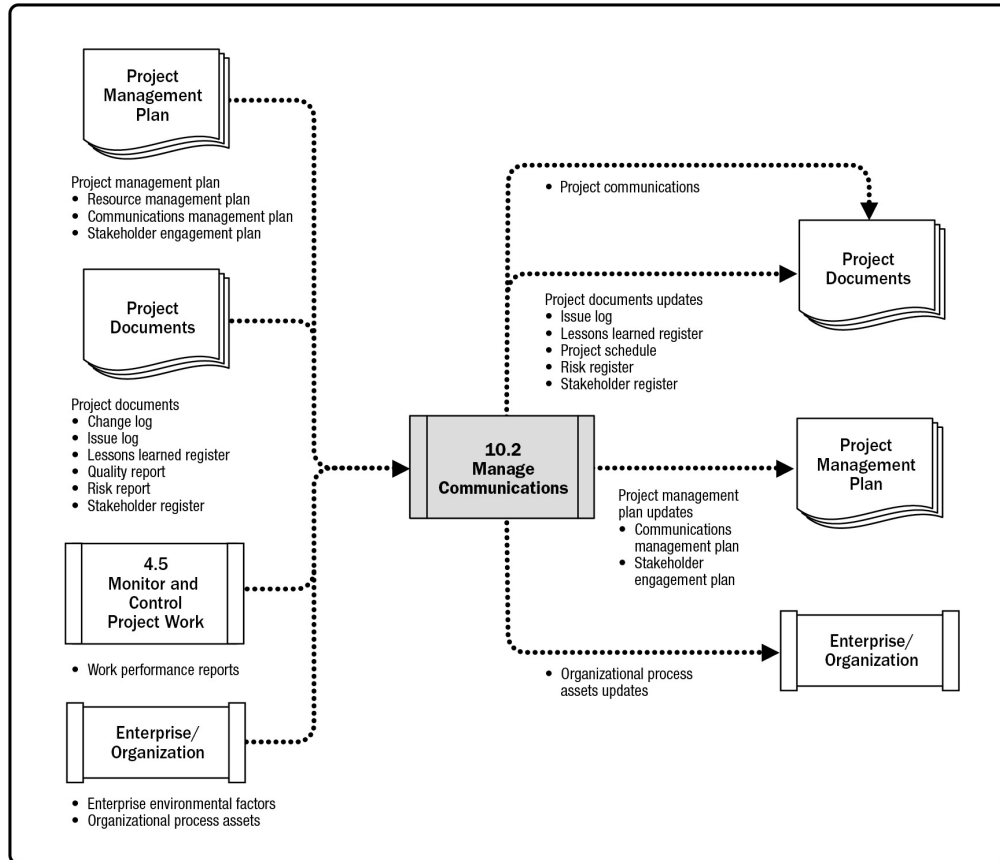


Figure 10-6 (Guide). Manage Communications: Data Flow Diagram

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The art of effective communication is getting the right information to the right stakeholder, in the right format at the right time! For more on this see: ***The three types of stakeholder communication***³.

³ **Three types of stakeholder communication:**

https://www.mosaicprojects.com.au/Mag_Articles/SA1020_Three_types_stakeholder_communication.pdf

Conclusion



***Data is not information,
information is not knowledge,
knowledge is not understanding,
understanding is not wisdom.***

Clifford Stoll

Overall, the *PMBOK® Guide* 6th Edition has got the flow from raw data to useful reports (processed information) fairly well defined; the only challenge is knowing where to look! Hopefully the 6th Edition will do a better job of 'joining up the dots'.

The subsequent challenge of gaining insight and knowledge through understanding the structured information contained in the reports and then using that understanding to make wise decisions is down to you!

The progress to *wisdom* is helped by concise analysis and effective report design, but also depends on the attitude and aptitude of the person receiving the information. Whilst various aspects of analysis are discussed, the key communication skills of information presentation and document design⁴ are largely missing from this version of the *PMBOK® Guide*.

First Published 20th Oct. 2014 – **Augmented and Updated**



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⁴ For more on **document design** see: https://www.mosaicprojects.com.au/WhitePapers/WP1065_Page_Layout.pdf