HOW TO - Monitoring Officer - Project Monitoring Actions

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1. The *Monitoring Officer* is the person responsible for collecting data for the project. In most cases this will be the Project Engineer who is also responsible for collating data for the fortnightly project report. If the project is at a *Planning and Investigation* or *Design* stage, then this may differ.

2. When you first click on the record you should see a series of fields for which you need to enter data for. NB// To save you time, some of these values will be carried across from the previous month's report and will need to be updated.

3. See the Field Descriptions Section for more details about what data should be entered for which field. When the data is entered select 'Save'.

4. Add Photos – you should add photos that show the progress or issues that are discussed in the 'Commentary on Progress' and 'Issues and Recommendations' section. This will provide evidence of what is being stated in the report. See the Add Photos to Project Monitoring Records article for a guide on how to do this.

5. If there is a Contract Monitoring record (in most cases there is), then update this also and select Save.

6. Finally, you will need to open the Monitoring Actions record and, if you are happy with the information you have entered for both the Project and Contract Monitoring record, then turn the 'Monitoring Completed' button to Yes and select Save.

7. This will trigger an email to be sent to the Approving Officer (most likely the PWM) with an attachment of the data in Draft Report format which they will use to perform their review. The Monitoring Officer will also be sent this email as a 'cc'. If the Approving Officer would like changes to be made, they may ask the Monitoring Officer to perform these or do these themselves.