

Project Control Reporting

Managing Scheduling Team Efforts

Schedule Creation:

The purpose of a schedule is to accurately reflect the “Project Plan”. The Project Plan is the direction of actions that a project manager plans to take to accomplish the project goal.

- The Project Schedule will reflect the tasks necessary to accomplish the project.
- The Project Schedule will create a timeline in which these tasks will be accomplished.
- The Project Schedule can create a cost model for budgeting purposes.

Schedule Creation:

Steps in Creating a Schedule:

1. Contact the Project Manager to discuss project plans.
2. Review the Project Definition or Statement of Work (SOW).
3. Retrieve schedule templates from Project Control Toolbox.
4. Construct WBS.
5. Drill out WBS to create “high level” or “macro” schedule.
6. Drill out high level (macro) schedule to task level schedule.
7. Assign duration, work, and resources to schedule.
8. Baseline schedule and begin maintenance and reporting.

Schedule Creation:

Contacting the Project Manager

This is the opportunity to set the scope of work to be performed by Project Control.

Scope setting includes:

- Project description and receipt of Project Definition
- Project responsibilities
- Conveyance of Project Control reporting capabilities and examples
- Understanding of Project Control processes
- Get to know each other and build foundation of teamwork

Schedule Creation:

Reviewing The Project Definition

The Project Definition is the Project Manager's contract with the customer, detailing the agreed upon objectives of the project.

A Project Definition will:

- List the overall objective of the project
- State key deliverables
- List the scope of work (What will be performed as well as what will *not be performed*)
- State the project timeline for project completion
- Give key constraints for deliverables and/or tasks
- List key risk issues and their mitigations

Schedule Creation:

Reviewing The Project Definition

The Project Definition is vital to understanding the needs of the Project Schedule.

- The lists of deliverables from the Project Definition should translate directly to the deliverables of the schedule.
- The scope statement will guide the tasks that are required.
- Constraints can determine timelines and work levels.
- Risks indicate milestone tasks that need to be confirmed before work can continue

Schedule Creation:

Schedule Templates

Use the schedule templates that are residing in the Project Control repositories. (AM/PM Toolbox, workgroup serve, etc.)

There are three Project Management templates: Major, intermediate, and minor projects.

Each template has the appropriate tasks for the project management section of a schedule.

Combine this with project framework templates to start a WBS

Use the templates to convey to the project managers proper scheduling structure.

Project Control

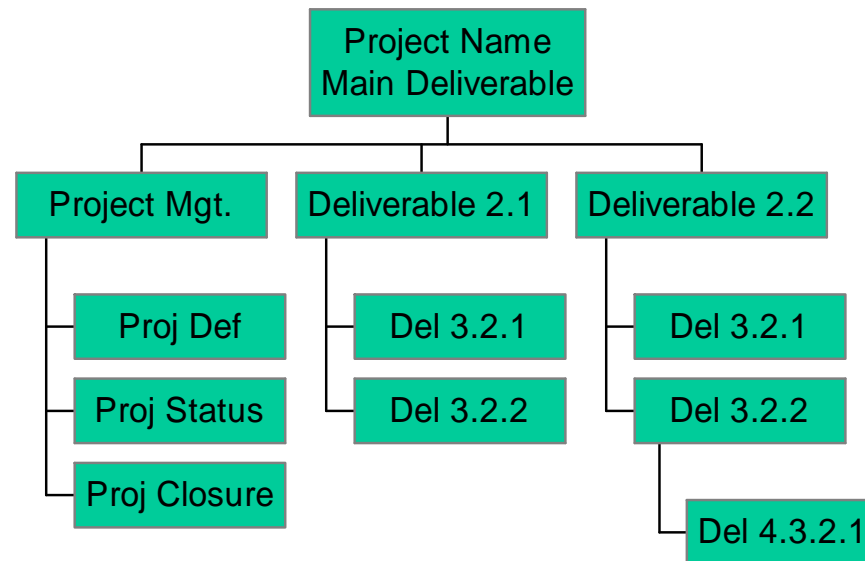
Schedule Creation:

Creating a WBS

A Work Breakdown Structure (WBS) is a high-level Org Chart view of the project deliverables.

WBS elements should come from the deliverables section of the Project Definition

The WBS generally does not need to go more than four levels in depth



Schedule Creation:

Creating a Schedule

Once the WBS has been reviewed and approved, a schedule can be created.

Some tips to remember:

- Review schedule templates in Project Control repositories to find reusable schedule parts
- Confirm any constraints of time and budgets with the PM
- Use a “What are We to Do” vs. a “What are We Doing”. This keeps you on a high-level deliverables track, and helps from getting bogged down detailing every task
- Use Verbs for tasks, Nouns for summary task deliverables

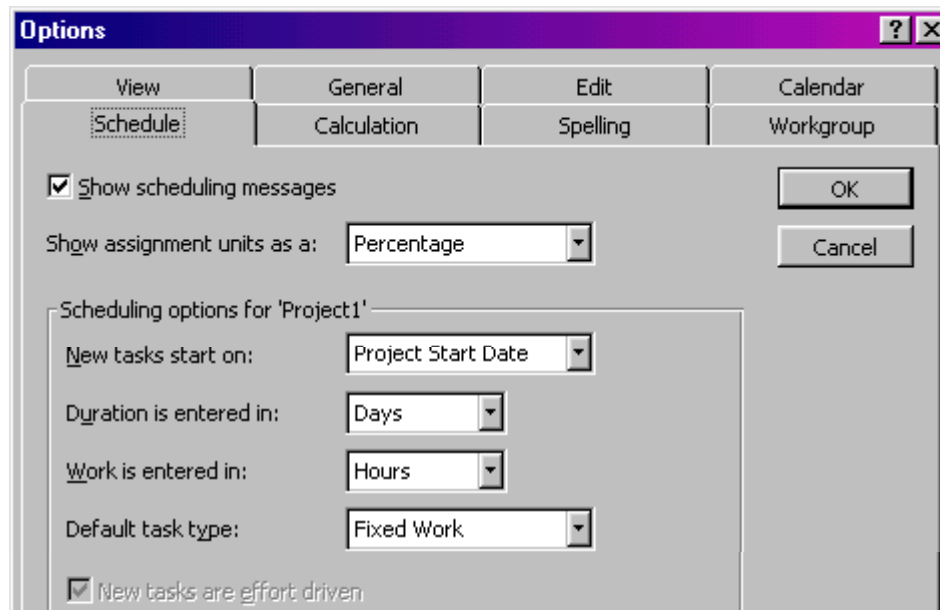
Project Control

Schedule Creation:

Creating a Schedule

Set up the Project Schedule using these MSProject guidelines:

- In **TOOLS, OPTIONS** from the menu bar, set the **DEFAULT TASK TYPE** setting to **FIXED WORK**



Schedule Creation:

Fixed Work vs. Fixed Duration

Fixed Work and Fixed Duration behave very similar when starting a schedule. But Fixed Duration causes addition work during the creation and maintenance of a schedule that is frustrating and time consuming.

With a resource is assigned, both will alter the other with changes. With Fixed Work, changing the work will alter the Duration, and vice-versa.

When creating a schedule, because you are trying to fit time constraints and budgets, you will change either one often, so make assigning resources to tasks your last step.

With Fixed Duration, removing a resource will remove work in the plan. This can cause erroneous work reporting if overlooked.

Once the plan is set and Actual Start and Actual Finish dates are applied, a Fixed Duration plan will change the work in accordance to the dates entered. Again, this will give erroneous data, that at a later time could cause many hours of unnecessary work to resolve.

Project Control

Schedule Creation:

Extra Steps to Follow During Setup

1. Under Project PROPERTIES, SUMMARY tab, enter the project name, as it appears in the Project Definition in the TITLE field.
2. Enter your name in the AUTHOR field.
3. Enter the Program or Project Manager name in the MANAGER field.
4. Enter the Client Name in the CATEGORY field.
5. Enter any useful information in the COMMENTS field such as additional managers on the project, dates a baseline was set. Items that are quick and easy, and would be useful if forgotten later. Larger items such as file errors and workarounds, COP data should be kept in a Schedule Log.
6. Do not use fractions of hours for tasks. If a task is that small, 15 min or .25 hours, it can be left out and restated to combine it with another task, or just make the task an hour in work. This will aid you scheduling issues that WILL crop up at a later time.
7. Same for Duration, make all durations minimum of one day. If task are small and occur the same day, simply use the Start-to-Start feature of the predecessor function. A 2 hour task can take 8 hours in duration.
8. If working with a file that has already been started by another person, select the entire project, and confirm that the TASK TYPE is FIXED WORK.

Schedule Creation:

Creating the Schedule Pointers

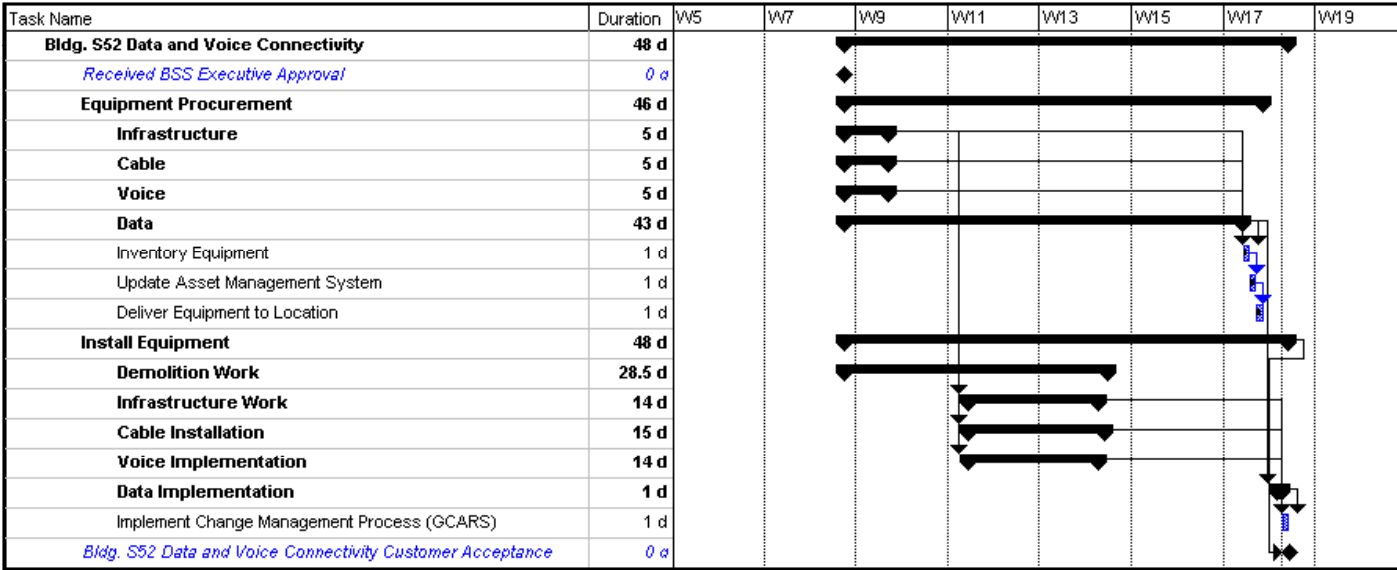
1. Use Nouns for Summary Tasks (Deliverables), and Verbs for tasks.
2. Do not create summary tasks without detail task following immediately. This is also known as a double summary.
3. Do not create summary tasks with only one detail task following. Simply use the detail task as a stand alone.
4. Be sure to remove the resource of any task that is a summary. Be cautious when revamping a schedule and creating summaries out of stand alone tasks. This is why it is better to leave resources off the plan you're ready to baseline.
5. A schedule should read like a book: Keep all sentences and paragraphs together. Use sub-tasks that are used in creating the deliverable.
6. Be clear and concise in task names. Don't use sentences, and don't make the name so short that it would be vague on its own, i.e.. "Turn the Key"
7. There is no need to be ultra elaborate. Most deliverables follow a simple "Research, Create, Review" pattern.
8. Follow other scheduling syntax standards concerning task naming.
9. Link summary tasks to summary tasks, and detail tasks to detail tasks.

Project Control

Schedule Creation:

The Schedule and the Project Definition

For the Work Activity section of the Project Definition, use the “camera shot” feature to create a GIF file. This provides a clean image and is reusable.



* There are limitations of the camera shot feature. The more lines you have, the smaller they will be represented in the image. The feature seems to “max out” at about 50 lines. After that, the lines become very small as you condense the image to fit on a single page.

Schedule Creation:

Task Naming Glossary Tips

1. **Create:** To make from near nothing. Create a WBS. No WBS existed before.
2. **Develop:** To make from existing material. Develop a schedule. This is taken from a WBS
3. **Define:** To detail an intangible, usually a process or requirements. Define a plan such as risk or Define Client requirements.
4. **Request:** To formally ask for, usually documentation or procedure. Request client list
5. **Submit:** To formally give to, Submit purchase order
6. **Review:** To examine with intent to critique, usually documentation. Review Project Definition.
7. **Schedule:** To make arrangements for, usually meetings. Schedule the CDR
8. **Assess:** To examine with intent o critique, usually asset performance. Assess network capacity.

Project Control

Schedule Creation:

Task Information Text Tips

When reaching near completion of the schedule, schedule information should be backed up. The best way to do this, is to use the text columns to act as place holders for fluctuating data such as dates, work ,and duration. Use the custom fields feature under TOOLS, CUSTOMIZE, FIELDS.

Use the following renaming patterns:

<u>Field</u>	<u>New Name</u>		
Text1	Project ID*	This field must be named this for the Earned value macro	
Text2	TxtComplete	Text7	TxtFinish
Text3	TxtWork	Text8	TxtAct Start
Text4	TxtDuration	Text9	TxtAct Finish
Text5	TxtResource	Text10	TxtBase Start
Text6	TxtStart	Text11	TxtBase Finish

When completion milestones are reached, such as balancing the number of hours, copy live data into these text fields for backup reference. Once you start tweaking a schedule, you'll notice that things start to change. Having a static backup works wonders as your point of origin.

Schedule Creation:

Finishing the Schedule

Once the schedule has been completed, it's not!

1. Line #1 should be the Project Title. All other tasks should be indented below.
2. Confirm that all tasks have hours assigned. This can, and should be done through filtering for zero-hour task. The auto-filter works great for this.
3. Replace any decimal fractions of work or duration. No more .25s
4. Add the resources. Be careful and watchful that no durations or work changes occur.
5. Confirm that the final work figure matches any budget previously agreed to.
6. Collapse the schedule and confirm that the major deliverables have the proper dates.
7. Review the overall flow of the schedule to make sure the date structure flows downstream. You shouldn't have implementation dates that start before the discovery dates.
8. Review the WBS, and make sure the deliverables from the Project Definition are visible.
9. Be prepared to baseline the schedule.

Project Control

Schedule Creation:

Baseline the Schedule

Once the schedule has been completed, it's not! But this is as good as it gets. There are some things you should be prepared for in baselining a schedule.

1. Once all data is confirmed and the schedule is approved, you can baseline
2. Save all data to the text fields.
3. Save a copy of the approved file. Save another copy as the pre-baseline file
4. Set the baseline by going to TOOLS, TRACKING, SAVE BASELINE. Select the SAVE BASELINE and ENTIRE PROJECT options. Click OK. And that's it.
5. Confirm that the final work figure matches any budget previously agreed to again by opening the COST and the BASELINE COST fields. Now open the BCWS field. Set the project status date to the last day of the project. At the project summary level, line #1, all figures should match.
6. Once all figures balance, save the file as the baseline copy.
7. Save another copy as the working copy. Now you have references for all stages of baselining should something go wrong in the future. AND IT WILL!
8. Never baseline just a section of a plan. The numbers do not total up to the summary level, and this can cause problems for future reporting.
9. Always re-baseline if a COP has been approved for a change in budget, dates, and/or scope (deliverables). A change in budget includes changing resource rates.

Project Control

Make sure you have all the latest versions of the Project and Excel macros.

- Earned Value
- Labor Format
- Stoplight Chart
- Schedule Variance Macro

Project Control

When Updating:

- Always use actual start and finish dates. If the dates are not supplied, use the Monday of reporting period for task start, and the Friday for task finish
- Do not reduce progress on tasks already completed
- If task is still in progress, reduce task completion to zero, re-enter actual start date, then enter progress amount

- Have the SV column in view when updating to confirm the progress is registering the proper amounts. We have found in the past that a task with 100% completion could still have a negative schedule variance.

- If you have problems with a task, italicize the task and type, in brackets, (see note). You can type a detailed message in the notes property, and make a entry into your project schedule log.