



**Ministry of Education  
Information & Technology Management Branch  
Project Support Office**

**Workplan Management Standards & Guidelines**

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## 1.0 Introduction

This document provides the Project Support Office (PSO) technical standards and guidelines for the development of Microsoft Project 98 workplans. Compliance with these standards and guidelines is necessary to ensure consistency in the development of project workplans.

A companion document, *MS Project Workplan Creation, Tracking and Reporting Procedures*, should be used in conjunction with this document.

These standards and guidelines can stand alone and are applicable for any project plan development using MS Project 98. Note that the standards also apply to earlier versions of MS Project, although the workplan templates developed in Project 98 can't be used in earlier versions.

## 2.0 Work Breakdown Structure

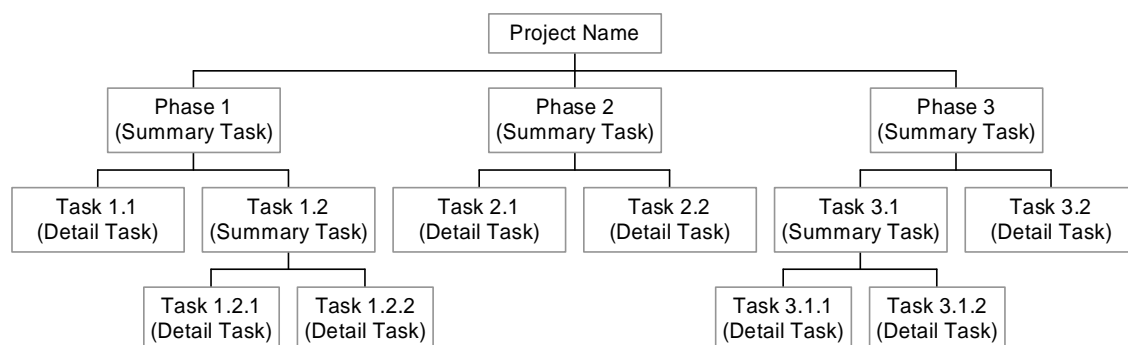
Prior to the actual development of a Microsoft Project 98 workplan, a Work Breakdown Structure (WBS) should be created to facilitate workplan development (Figure 1). The work breakdown structure can be created manually using sticky notes to represent tasks. There is also a software tool called WBS Chart for Project which is very useful for this purpose.

WBS is a top-down approach to project planning where an organization chart-like structure is used to identify major components of a project. Each major component of a project can then be further broken down until eventually all the tasks involved in the project have been identified. Once a WBS has identified and structured all project tasks, development of the actual Project 98 workplan may begin. The WBS Chart for Project tool will create a MS Project plan directly, thus eliminating the data entry step.

When creating a WBS, it is important that project tasks be identified and structured in a logical order to ensure that the scope of the project is accurately depicted. To ensure that this is done, an appropriate Systems Development Life Cycle methodology should be identified prior to WBS creation and adhered to throughout the planning process.

Prior to conversion to a MS Project workplan, it is important to organize the WBS Chart so that it is well structured. If using WBS Chart for Project, it is easy to move blocks around to create a flow which makes a usable workplan. Then, when the WBS Chart is complete and organized in the best possible way, the project workplan can be generated.

**Figure 1: Work Breakdown Structure Example**



### 3.0 MS Project Workplan Template & Sample Workplan

The MS Project 98 Workplan Template provides a starting point for the development of new Project 98 workplans. It includes all the views, reports, tables and filters for standard workplan creation and maintenance, as well as most of the workplan reporting requirements for the project.

In addition, special lifecycle templates may be created and maintained by the PSO.

Project managers may use the Workplan Template by copying it into the destination project file library and saving it with a name appropriate to the project. Even though it is a Template ("mpt"), it will automatically be copied as a Project Plan ("mpp") by MS Project and will be ready for use. If the WBS Chart for Windows tool has been used to create the initial workplan, it is a simple process to copy the tasks from there to the destination workplan.

Refer to the *MS Project Workplan Creation, Tracking and Reporting Procedures* for instructions for using the Workplan Template for the creation of a project workplan and for subsequent tracking and reporting against the workplan.

### 4.0 Converting Existing Workplans to PSO Template

Existing project plans can easily be converted to the PSO Standard Template format. These are the steps to take to convert a workplan into the PSO Standard Template format.

- Open your workplan.
- Open the Standard Template
- Save the template as a project workplan (".mpp") giving it a unique name.
- Complete the File/Properties section in the new workplan with your project demographic information.
- Enter the Project Start Date in Project/Project Information.
- Go to Tools/Options on both workplans and make sure the Project Summary Task is unmarked in View/Outline Options. This will eliminate line 0 from the workplans, and makes the copy exercise easier.
- Check other parameters in Tools/Options in the new workplan for defaults. You may choose to change some of them to match your existing workplan.
- Go to View/Resource Sheet in both workplans.
- Select all resources in your existing workplan (choose left-most corner to select all) and copy.
- Go to new workplan and paste. All resources should copy over.
- Go to View/Task Sheet (or Gantt - All Tasks) for both workplans.
- Select all tasks in your existing workplan (again, choose left-most corner) and copy. For this step, it's easier if the Project Summary Task (line 0) is not present (see step 6 above).
- Go to new workplan and paste. All tasks should copy over, structured correctly.
- You may now change the Project Summary Task option in Tools/Options/View so that it prints line 0 (optional), which is the project heading.

- Check dates. If you find that task dates have changed, it is probably because the calendars are different. Note that the Template has eliminated statutory holidays as working days, which will cause your plan to extend out slightly if your original calendar included these. If the start date is incorrect, adjust the Project Start Date. Further differences may be caused by workday definition differences (the template uses the MS Project default), or by differences in Default Task Type in Tools/Options/Schedule, where the template uses Fixed Duration instead of the MS Project default of Fixed Unit.
- If you are using customized calendars different from the Standard, then you must copy them from one plan to the other. The best way to do this is with the Tools/Organizer feature.
- Check various Views and select the most useful ones. You may choose to edit some tables.
- For Ganttts, you'll probably need to change the Format/Timescale to fit the page for printing.
- Print some sample views to test the printing and layouts.
- When satisfied, save your workplan using a permanent file name. This should replace your previous version.

#### **Some special notes are as follows:**

- This procedure works very well when transforming from WBS Chart to MS Project. When you choose WBS Chart to create a project plan, copy the tasks from the temporary file created by WBS Chart directly to the template workplan that you have previously saved under your project name.
- The order that you do the steps is important. You should always save the resources before you save the workplan tasks, so that the tasks can associate with an already-existing set of resources. If you reverse the steps, MS Project will create default resources and it will be much more difficult to rationalize the resources.

Please call the Project Support Office if you need help.

## **5.0 Standards and Guidelines for Project Workplan Development**

To ensure workplan consistency, it is mandatory that the Workplan Template be used as the starting point, and that the workplan follows the organization's standards.

### **General**

To ensure workplan consistency, it is important that the Workplan Template or Lifecycle Template be used as the starting point, and that the workplan follows the organization's standards.

- The workplan must be structured with a top-down view and must be capable of reporting logically at both management level and detail level. This means that a workplan will always contain one Project level summary task (Task 0 or 1, the Project Name) with one or two lower summary levels for management reporting (i.e., 2<sup>nd</sup> and 3<sup>rd</sup> level).
- It is allowable to have summary levels below the 3<sup>rd</sup> level, but these are considered detail tasks and generally not reported on the management reports.

- Unless the workplan is very small, detail tasks should not be higher than the 3<sup>rd</sup> level.
- The workplan should contain milestones for all summary tasks. Milestones representing significant points of interest to management may be designated major milestones.
- All project deliverables must be represented in the workplan. Deliverables must be unique entries and should not be represented by milestones.
- The project should have a Sponsor and Project Manager/Leader identified in the File/Properties section in the Manager field. This transfers to the right heading line of all reports.
- The project name must be identified in the File/Properties section in the Title field. This name appears as the first centre heading line on all reports.
- The File/Properties/Subject field may be used optionally. It will appear as the second centre heading line on all reports.
- Projects should be defined on a Fiscal Year basis to match the organization's planning cycle, as much as possible. Carrying the history of previous fiscal year(s) on a current workplan should be avoided, although it is allowed if the tasks cross the fiscal year. Similarly, it is allowable to go beyond the end of the fiscal year. Two years is a guideline maximum for a planning threshold, with five years as the absolute maximum. Multi-year projects should be re-planned at least once a year, and the historical plan should be archived.

## Tasks and Summary Tasks

### Definitions:

**Summary tasks**, or simply summaries, are combinations of tasks and represent subsections or subdivisions of a project. Summaries may encompass detail tasks or combine lower level summaries that in turn encompass detail tasks.

*Detail tasks, or simply tasks, are single activities that describe the work encompassed by a summary task at the lowest and most detailed level.*

Task names (summaries and details) should start with an Action Verb (such as "Develop", "Test", etc.). Allowable exceptions include:

- If the subsection heading contains a verb that describes the activity for all the tasks under it, then it is not necessary to repeat the verb.
- If the section or subsection is a category or subject heading where the use of a verb is meaningless, then this is allowable as long as the sub-tasks below contain action verbs.
- Detail tasks should have a duration defined in days. Ideally, tasks should be broken down to a level such that no detail task has a duration shorter than 1 day or longer than 20 days.
- Detail tasks must be organized under summary tasks. As a rule, no more than four levels should be used under the main project level. Too much detail becomes difficult to manage and should be avoided.

## Milestones

### Definition:

A **Milestone** represents the completion of a summary (section or subsection) or a significant accomplishment or event in the life of the project.

- Milestones should be established at the end of every summary in the project to mark its completion. They should be described in terms of the summary with which they are associated, i.e., the milestone for summary "Complete Phase I" may be "Phase I Completed".
- Milestones have no duration (0 days) or resources assigned.
- Milestones representing significant points of interest for management reporting should be designated as Major Milestones.
- A milestone is designated as Major by entering a "Yes" in the "Major Milestone" field of the Entry-Tasks view (or Task Sheet) using the Entry (Flags) table.

## Deliverables

### Definition:

Deliverables represent items that must be produced during the course of the project as part of the project responsibilities.

- All designated project deliverables must be accounted for in the workplan.
- A deliverable may not be represented by milestone and must stand alone.
- Deliverables have no duration (0 days) or resources assigned.
- A task is designated as a deliverable by entering a "Yes" in the "Deliverable" field of the Entry – Tasks view or (or Task Sheet) using the Entry (Flags) table.
- A deliverable description should be the actual name of the deliverable, with no verbs.

## Calendars

### Definition:

A *Calendar* is used to define the hours of work per day, workdays and non-workdays over the duration of the project. A Base Calendar is used as the primary calendar for the project or organization. Specific resource calendars may be created to provide exceptions to the base calendar.

- The Sample Template Base Calendar (or "Standard Calendar") has been modified to include all Government statutory holidays through the Year 2010. This calendar is based on the standard MS Project 8-hour day and 40 hour workweek. Because the standard is to use days for all effort and duration estimates (rather than hours), there is no need to change the MS Project standard. This avoids the problem of deciding how long to make an actual workday, since for estimating purposes it is often assumed that a 100% dedicated task for a workday may only be 5 to 6 hours actually applied to that task.
- Individual calendars may be created for specific resources, but they must be approved and added by the PSO Administrator. For example, an individual

calendar might be created when it is known that a particular resource is unavailable for a period of time or when a resource's hours of work are significantly different from the standard, such that it affects the schedule.

## Views and Tables

### Definitions:

A *View* is a screen display of project data. A View may consist of a Table only, or a Table and Gantt Chart (project schedule). Views may be printed as a Report.

A *Table* is a series of fields (columns) that define the data to be displayed for each task, summary, milestone and deliverable in the View.

The *Gantt* is a visual chart of the tasks, summaries, milestones and deliverables represented by bars and symbols across a timeline. Several standard Views have been created in the Standard Template.

- A series of standard views have been incorporated into the Workplan Template for data entry and project reporting.
- All data should be entered using one of the four standard entry views (Task Sheet, Entry Gantt– Tasks, Entry Gantt– Tracking or Resource Entry).
- The default view in the Template is the Task Sheet. It is the only view which has been designed for both data entry and reporting, and is the view most commonly used for entering and reporting detail tasks. It defaults to the Tasks Table.
- The Entry Gantt– Tasks view is an alternative task entry form, and is useful because it shows the Gantt. There are three tables which can be used with this view: Entry (Data), Entry (Flags) and Detail.
- Note that the Tasks Table and Entry (Data) Table are identical except the former has two spaces per row, allowing the full task description to display and print. These tables are interchangeable as the user wishes.
- An optional table is the Details Table. This table omits Deliverable Code, includes a Cost Column and has the Resource Initials further to the right.
- The Entry Gantt– Tracking view is used for entering project status information as the project progresses.
- The Resource – Entry view is to be used for entering resource demographic information.

The remaining standard views have been established for project reporting. Below is a complete list of all Views, in the order they appear in the Template View list.

<b>View</b>	<b>Use</b>
Entry Gantt – Tasks	Used for Data Entry of tasks where the Gantt is needed. Most likely resembles the default MS Project "Gantt" view.
Entry Gantt – Tracking	Used for Data Entry of project status (i.e. %-complete) information.
Gantt – All Tasks	Produces a Gantt chart for all project tasks.
Gantt – Current	Produces a Gantt chart for all project tasks in progress or due to start by the date entered by the user.
Gantt – Late Tasks	Produces a Gantt chart for all project tasks late as of the date entered by the user.

<b>View</b>	<b>Use</b>
Major Milestones	Produces a Gantt chart for all designated major milestones & associated summary tasks.
Milestone Variance Report	Produces a Gantt chart of all designated major milestones, showing variations from the latest baseline. Does not show summary tasks.
Milestones	Produces a Gantt chart for all designated milestones & associated summary tasks.
PMR (Not in use).	Used to enter criteria for the Project Management Reporter (PMR) system. (Not in use).
Project Deliverables	Produces a Gantt chart for all designated project deliverables and associated summary tasks.
Status Report	Shows all tasks in progress or due to start as of the date entered by the user. This report includes a space for written comments and is used as a turnaround document for reporting progress.
Status Report – Completed	Status Report showing all tasks which are 100% completed.
Status Report – Late	Status Report showing all tasks that are late as of the date entered by the user.
Status Report for Group	Status Report showing all tasks assigned to resources from the Group entered by the user.
Status Report for Resource	Status Report showing all tasks assigned to the single Resource (resource initials) entered by the user.
Summary Gantt	Produces a Gantt chart for all project summary tasks at a level (1, 2, 3, etc.) entered by the user.
Summary Gantt – Special	Produces a Gantt chart for all designated project summary tasks pre-selected by the user (using the "Display Summary" Flag). Used when the Summary Gantt has a mixture of levels needed.
Task Sheet	Shows all key data fields for all project tasks and does not included a Gantt chart. This View can be used for Data Entry and as a Detail Task Report. This is the Default View.
Task Sheet – Critical Path	Task Sheet showing only those tasks on the Critical Path, i.e., those tasks which if delayed would delay the final project date.
Task Sheet – For Resource	Task Sheet showing the tasks which the selected resource has been assigned, plus associated summary tasks.
Task Usage	Displays a table showing the amount of time each resource spends on specific tasks over a selected time period.
Resource Entry	Used for Data Entry of Project Resources.
Resource Graph	Displays a graph depicting % work allocation for each resource on the project.
Resource Percent Allocation	Displays a table showing the % of each resource's time that is allocated over a selected time period. Optionally may show detail tasks for each resource.
Resource Work Allocation	Displays a table showing the amount of each resource's time in days that is allocated over a selected time period. Optionally may show detail tasks for each resource.

- There is no View that specifically shows tasks that are behind schedule. However, these are easily identified on the Gantts as incomplete tasks and milestones to the left of the Current Date Line. Note that the Current Date Line can be changed in

Project/Project Information. This is advisable if the status was corrected several days before the plan was updated and the reports printed.

- The views listed above are the standard sets. Additional views and tables may be created by the user for special purposes.

## Reports

### Definition:

A **Report** is anything that can be printed from MS Project. In addition to the Views which may be printed (see above), there are many reports which are not available as Views. Most reports are defined in terms of tables. Categories of Reports include Overview, Task, Cost, Workload, and Custom.

- There are many "standard" reports that have been customized for use in the Workplan Template. Some are printed from Views (see above), while others are printed from the Reports Window. For the latter, the list of reports is located in the Custom Reports window. For most situations, the View Reports are sufficient and there should be no reason to use the Reports Window at all. Customized reports include:
  - Resource Usage Detail Reports
  - Resource Usage Summary Reports
  - Status Reports
  - Summary Project Reports
  - Task Usage Detail Reports
- Other reports may also be used (though they do not have the customized headers and trailers). Ad-hoc reports may also be created.
- Many desirable reports are not available through MS Project. A prime example is the inability to report resources under summary tasks. Also, the MS Project reporting function does not provide the flexibility for column widths, order of detail, etc., which is often needed.

## Timescale

### Definition:

The **Timescale** is used to scale the Gantt Chart or Resource Chart. The scale can be set in years, quarters, months, weeks, or days, and there can be a major and a minor scale within. There are other scaling features, including an Enlarge feature that allows a scaling from 25% to 1000%.

- Special mention of the Timescale is necessary because of the wide variety of time periods over which a project can extend (from a few weeks to several years). The Workplan Template Timescale has been set with Years as the major scale and Months (Jan, Feb, Mar,...) as the minor scale, with the Enlarge set at 65% to 100% depending on the table size. The Timescale is used to define the periods in the Gantt View and for Printing (see also below).
  - If the project runs one to two years, then the default timescale should be adequate.
  - If the project is much shorter, then consider changing the timescale to weeks or days from months.
  - If the project is much longer than two years, the timescale should be changed from months to quarters.

- The Count for a timescale factor may be changed from the default "1". For example, to show every two months, set the minor scale to months and the count to 2.
- The Enlarge feature is very useful for fitting the Gantt on the paper or screen size. This will increase or decrease the column width of the Timescale. For example, if it is set to 50%, then twice as many time periods will appear on the page. If it is set to 200%, then half as many time periods will appear.
- A feature in Project 98 allows the user to scale the printing in the Page Setup. This feature, combined with the Enlarge described above, allows the differentiation between printing and viewing.

## Printing

In order to make the Workplan Template as general as possible and easy for use in creating reports, standard parameterized headings, footers and legends have been established for all the standard Views and Reports to be printed. All other Views and Reports show the Microsoft default headings only.

Some fields, such as the Project Name, Organization/Branch Name (known in MS Project as "Company Name"), Subject, and Sponsor and Leader Names ("Manager" in MS Project) are taken from the File Project Properties fields, which were prepared at the start of the project plan. Others, such as the View or Report type, are taken from the chosen View/Report. The parameter fields must be completed for the Headings to appear correctly.

For printing Gantt Charts, always choose to start two or three periods (generally months) before the project start and three or more periods (again generally months) after. This is to ensure the Percent Complete will show to the left of all the tasks, and Resources to the right.

Printing on a non-Postscript printer may require some project plan editing to ensure a proper fit on the page.

- Look carefully at the Print Preview before printing to make sure that the plan has not spread rightwards across two or more pages. Use the Scaling feature in the Page Setup to decrease or increase the sizes, and/or the Enlarge feature in the Format/Timescale.
- Check to make sure the appropriate table columns are printing. If not correct:
  - go into Page Setup / View and changing the minimum number of columns to be printed, and/or
  - move the split window leftwards to include fewer columns.
- If the Gantt still does not fit after all the above procedures have been tried, then consider more drastic measures, such as:
  - designing a new table with fewer columns
  - reducing the length of your plan time span.

## Filters

### Definition:

A **filter** is a set of criteria that is applied to all tasks or resources to differentiate those that meet the criteria from those that do not. A filter can be used to either hide from view those not meeting the criteria or highlight those that do. We only use the former definition.

- Numerous Filters have been incorporated into the Workplan Template; they are used to create the specialized views and reports.

- There may be times when a different filter is needed for a standard report, such as choosing specific resources instead of all resources, specific groups, omitting specific groups, etc.
- If there is a special need that isn't covered by the standard set, additional filters may be created and used for reporting or viewing purposes.

## Resources

### Definition:

Project Resources are personnel assigned to work on the project. Resources are usually specified by name, but may also be generic or represent a group of resources.

- As resources are assigned, they will be saved in the workplan. Special resources, such as Contractors, Consultants, Ministry staff, etc., may be added. MS Project uses the Resource Name to consolidate resources, so it is important that the name be distinct from other resources.
- A Sponsor and Manager/Leader should be assigned to the main project task using zero-work. Leaders of sub-sections (summary tasks) may be assigned in the same way. This ensures their names will appear on summary reports beside the summary tasks.
- Resources with work effort should always be assigned to the lowest level task and should never be assigned to summary tasks.
- The over-allocation of project resources should be avoided; resources should not be allocated over 100%. The Resource Usage Allocation report may be used to monitor resource allocation.

## Task Start Date, Finish Date, Duration and Critical Path

### Definitions:

Duration is the elapsed time, in working days (business days), between the **start date** and **finish date** of a task. The values of these three fields are interconnected; defining two establishes the third.

The Critical Path is a sequence of tasks, each of which must finish on schedule for the project to finish on time. Any delay to a task on the critical path will cause the project finish date to be pushed back unless the duration of a subsequent task on the critical path is shortened.

- Avoid hard-coding specific dates in the workplan. The ideal plan has only one fixed date, the Project Start Date that was entered in the Project Information. All other tasks and milestones should be linked together, using durations, lags and leads, with all of them eventually linked to a Project Close milestone. Thus, the critical path and non-critical paths can be drawn, and the Project Finish Date will be derived from the critical path. Exceptions include:
  - Tasks already started or finished, completed milestones and completed deliverables.
  - Fixed-date tasks such as year-long maintenance activities or seasonal tasks (e.g., field work).
  - Fixed-term contracts.
  - Milestones or deliverables which have pre-set dates.
  - Tasks with no predecessors but which can't (or have no reason to) start earlier than a particular date.

## Task Types and Effort Driven Scheduling

### Definitions:

MS Project uses three Task Types:

- **Fixed Units** (the MS Project defaults). Fixes the percent of time a resource will work on the task.
- **Fixed Duration** (the Template default). Fixes the duration of the task.
- **Fixed Work**. Fixes the total work of the task.

MS Project uses two types of scheduling:

- **Effort-Driven Scheduling**. Does not change the total work for the task when resources are added or removed.
- **Non-Effort-Driven Scheduling**. Will not change the units of work for the task when resources are added or removed.

The following table shows the effect of changing units, work effort or duration for each of the task types. "C" represents the Change made, "Y" represents what gets changed, and "N" represents what stays the same.

	<b>Units</b>	<b>Work Effort</b>	<b>Duration</b>
<b>Fixed Units</b>	C	N	Y
	N	C	Y
	N	Y	C
<b>Fixed Duration</b>	C	Y	N
	Y	C	N
	N	Y	C
<b>Fixed Work</b>	C	N	Y
	N	C	Y
	Y	N	C

The following table shows the effect of adding a resource for each task type.

		<b>Units</b>	<b>Work Effort</b>	<b>Duration</b>
<b>Fixed Units</b>	Effort-Driven	N	N	Y
	Non-Effort-Driven	N	Y	N
<b>Fixed Duration</b>	Effort-Driven	Y	N	N
	Non-Effort-Driven	N	Y	N
<b>Fixed Work</b>	Effort-Driven	N	N	Y
	Non-Effort-Driven	N/A	N/A	N/A

The majority of tasks will be Fixed Duration and Effort-Driven. This combination keeps the schedule relatively stable when adding or removing resources from tasks or changing work effort. Fixed Duration has been chosen as the Template default rather than Fixed Units to avoid dates changing when resources are added or removed from tasks.

## Linkages: Predecessors and Successors

### Definitions:

Linked tasks are those that have a dependent relationship.

A Predecessor is a task/milestone that determines the start or finish of the linked task.

A Successor is the task/milestone whose dates are determined by the linkage.

Lag Time is a delay that must be observed between the scheduling of two linked tasks.

Lead Time is the amount of time that a dependent (successor) task can overlap it's predecessor.

**Linkages** include:

- **finish-to-start (FS)**: predecessor must finish before successor can start (default and most common linkage).
- **start-to-start (SS)**: predecessor's start date determines the successor's start date.
- **finish-to-finish (FF)**: predecessor's finish date determines the successor's finish date.
- **start-to-finish (SF)**: predecessor must start before successor can finish (rarely used).
- A **lag** is used to put a delay into the start of the successor.
- A **lead** is the opposite of a lag; it is used in FS relationships to allow the successor to start before the predecessor is finished. This is a useful feature for compressing a schedule.
- The ideal workplan has all tasks linked so that a critical path can be established, and changes to tasks will appropriately change the project schedule.
- Too many predecessors or successors to/from the same task or milestone will complicate the workplan and should be avoided. A reasonable maximum is six. A dummy task or milestone may be added to separate them.

## Cost Entries

- Cost information may be entered as Fixed Costs in the workplan.
- The standard is to carry cost information in thousands of dollars (\$K), with one decimal.
- Costs will be summarized at the project level.

## Review of Project Plan

- Newly developed workplans should be reviewed to identify any errors made during the development process. MS Project is a complex and detailed application and mistakes are easily made when developing new workplans. To help identify errors:

- Print reports and check all tasks and milestones for accuracy and reasonableness.
- Ensure milestone reports and summary reports come out properly.
- Check for the critical path.
- Review the resourcing reports.
- Prepare a draft workplan and review it with the Project Manager/Leader and the project team. They must accept and approve the workplan before it can be implemented.

## Baseline Plan

### Definition:

A *Baseline* is a copy of the schedule dates, work, and cost data at a given moment in time that is used for comparison purposes when tracking project progress. Ideally the Baseline is the final workplan just before work begins on the project, and it is part of the Project Plan approved by Management.

- Once the project plan has been approved, set a baseline project workplan. The baseline workplan can then be used to compare changes to the original plan.
- Ideally, the baseline should be set before any progress is assigned.
- Occasionally it is necessary to change the original plan and reset the baseline.

## Standards & Guidelines for Project Workplan Tracking & Reporting

### Tracking Progress

#### Definition:

The Percent Complete ("% Complete") is a measurement of the actual duration or work that has been completed for a given task. It is measured as the ratio of actual work or duration to scheduled work or duration. Percent complete for summary tasks is calculated automatically by MS Project from the tasks within.

- Project progress is tracked by using the Duration "% Complete" feature at the task level (not the summary level). The % complete will be displayed on the left of the task's bar graphic on the Gantt Chart.
- Standard guidelines for tracking progress at the task level are:
  - 0%: not started.
  - 10%: started.
  - 25%: not half way yet.
  - 50%: over half way.
  - 75%: nearing end.
  - 90%: ready for review.
  - 100%: approved / complete.
- Milestones and Deliverables are always 0% or 100% finished. The differentiation shows on the Gantt with a different symbol.
- MS Project will compute summary level % complete levels using a formula derived from the duration of the tasks within. These will appear on the Gantt to the left of the summary tasks.

- The Task bars and Summary Task bars will also illustrate the % duration complete through shading. They look very much like a thermometer, and can be used as a guideline to visually show progress against the Current (or Status) Date Line on the Gantt.
- Occasionally, the % complete and the Task bar or Summary Task bar "thermometer" will appear to be out of sync. This occurs when there is a gap in time contained within (a vacation block for a resource, a gap of time within the summary task), or the tasks within the summary are very skewed to the left or right of the summary time bar.
- In MS Project there is also a % Work Complete field, which shows the amount of work completed rather than duration. This field is best used when actual work time is also tracked within the workplan.
- Changing the duration of a task which has had progress assigned will change the % complete. Thus, if the duration of a task that shows 75% complete is lengthened, MS Project will automatically reduce the % complete figure. If this occurs, the %-complete should be adjusted back to meet the guidelines. As a rule, it is best to zero out the % complete task if maintenance (such as changing effort or duration) is being done to the task, and then reassign the % complete afterwards.
- Once a task has been assigned 100% complete, dates or resource allocations for that task should not be changed. If a date or duration must be changed, the % complete must be set to less than 100% before any dates or duration are changed (i.e., follow the procedure in the point above).

## Reporting

- All reports are produced from the View list or Report list.
- Reports of particular relevance for Project Managers, Leaders and Project Teams are:
  - Detail Gantt Chart(s) and Task Sheets.
  - Resource Usage Detail report(s) (i.e., people with assignments).
  - Task Usage Detail report(s) (i.e., assignments with people).
- Important reports for Working Group Status Meetings are:
  - Detail and Summary Gantt Charts for approval prior to setting Baseline.
  - Status Report(s) - especially Current and Late.
- Important reports for Branch Managers or Project Sponsors include:
  - Milestone and Deliverable Reports.
  - Summary Project Reports and/or Gantt Charts.
  - Resource Usage Summary Report(s).
- Reports for Steering Committees and Management include:
  - Summary Project Reports and/or Gantt Charts (at branch or major project level).
  - Deliverable and Milestone Reports - especially Major Milestones.
  - Resource Usage Summary Report(s) - especially global corporate Resource Usage.
- Note that any group may ask for any report on a special-request basis.
- If custom or ad-hoc reports need to be created that are not part of the standard set, then (if possible) use one of the existing reports as a model and copy it using the new report name. Avoid changing the standard set of reports.



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