

## Planning Phase

### RFE Phases Definition Chart

SCE/Client/External: [Create Phases]  
- All Parties Define Deliverables/Acceptance Criteria

SCE: [Offer SCE-Phases' Duration] (See Note A)  
Client: [Offer Client-Phases' Duration]  
External: [Offer External-Phases' Duration]

### MS Project Gantt Chart View:

SCE: [Prep Gantt Chart View's Entry Table Task > View> "Gantt Chart" + "Entry Table" > Show (Add New Column): Work, Task Name, Predecessors, Duration, Start, Finish, Resource Names, Cost and Note (Input the initial Resource Assumption Notes used in offering SCE-Phase Duration initial estimate. See Note A)

SCE:[Create Master Schedule: Internal/ Client/ External WBS  
> Insert, Group and Link Project Tasks: Capturing Project/Phases Summary Tasks: Delivery/Development/Approval/Milestone/ Cost Control Gates

SCE: [Calculate Master Schedule: Baseline 1's Proposed Internal/Client/ External Phases' Start and Finish Date]

> Enter: Vendor's quoted "Duration" value into "Outsource Phases" assigned to Vendors (As Cost Resource Type. See Note: B )  
>Enter: Work (Value = Hours, Total Man-hours estimated to complete the Tasks, Estimated by SCE Subject Matter Experts)

> Assign: Generic or Specific Resources from ERP (See ERP) to each task: (Resource Type = Work (Human. In Task Form, mostly choosing Fixed-Work Task Type. Review and based on the Project Assumption Note recorded previously; use that to specify each task's resources' Work value (in Hour), let MS Project calculate the Duration. (See Appendix A)

> Evaluate the outputted Duration, adjust Plan to fit Client's desired deliver dates  
> Repeat: Previous Steps to find out what are the Start and Finish Dates

### RFE Phases Definition Chart

SCE: [Offer Baseline 1's Proposed Internal/ Client/ External Phases' Start and Finish Date]  
> Offer Start and Finish Dates to Vendors, Clients and All related Parties (Internal Leads, Resource Managers  
> Confirm Everyone's buy-in of the Start and Finish Dates

### MS Project Gantt Chart View:

SCE: [Set Baseline 1's Proposed Internal/ Client/ External Phases' Start and Finish Date]  
> Project Tab> Set Baseline> Baseline 1

## Tracking Phase

### MS Project Tracking Gantt View:

SCE: [Prep Tracking Gantt Table]  
Task > View> "Tracking Gantt" + "Tracking Table"  
> Show (Add New Column): Start, Finish, Task Name, Act. Start, Act. Finish, % Complete, % Work Complete, Work, Act. Work, Remaining Work, Act. Duration, Remaining Duration, Act. Cost. Duration (Optional: Baseline # Start/ Work/ Cost)  
> In Task Form, Right-Click: Select "Work" View, Select appropriate Task Type (Appendix B1)

SCE: [Update Actual: Fixed Unit Type, RE-estimating Work]

For each Task:  
> Enter Act. Start Date  
> Open: Task Form

>Enter: Actual Work (Gather from Time Card)  
> Ask: Each resource for "Remaining Work estimates" (Value = Hours)  
> In Task Form/Work View, Enter: Rem. Work  
> % Complete, % Work Complete, Start and Finish Dates will be calculated automatically  
SCE: [Update Actual: Fixed Unit Type, Fixed Unit Type, RE-estimating Duration]

Method 1:  
For each Task:  
> Enter Act. Start Date  
> Enter Act. Finish Date  
> % Complete, % Work Complete, Start and Finish Dates, Duration will be calculated automatically

Method 2:  
For each Task:  
> Enter Act. Start Date  
> Enter Act. Duration  
> Enter Rem. Duration  
> % Complete, % Work Complete, Start and Finish Dates, Duration will be calculated automatically

SCE: [Fixed Duration/or Work], while change Units (New Resource Assignments)

For each Task:  
>Use Tracking Gantt View combined with Task Form to assign additional or remove Resources

If adding more resource:  
> Enter: Act. Work for existing Resources  
> Enter: Rem. Work for existing Resources  
> Add/Assign Resource in Task Form/ Work view, > Enter Work and Rem.Work for the new resource

>% Complete, % Work Complete, Work, Start and Finish Dates, Duration will be calculated automatically

SCE: [Reset Baseline #]

### Reports Center

SCE: [Generate: Summary Report, Issue/ Risk Log and Chang Request, Update Scope if Needed]

Appendix B1:  
When Tracking, "Task Type" needs to be re-selected as well.

Ask oneself the following question: Duration, Work and Unit, which one is to remain constant (that's the Fixed-[Task Type], which one is to be inputted and the third one would be the automatically generated output via Project's scheduling engine. Note that, if you have a [Fixed Duration + Updated Works] task type, track/update in the "Task Usage" view, with "Peak" Turned on. Peak will indicate the "overtime" % of a given resource unit.

### Appendix B

% Work Complete = Actual Hours Spent / Baseline Work (+/-) Remaining Work

1. When was the task scheduled to start and complete?
2. What was the original task effort?
3. When did the work actually start?
4. How many hours have been spent on the task?
5. How many hours are remaining?

For 1 and 3, see Appendix C

### Appendix C

% Complete = Actual Duration/ Baseline Duration (+/-) Remaining Duration

% Complete is Duration based (For Fixed-Duration Task Type's Progress Tracking)

% Work Complete is Effort (Man-hour) based. (For Fixed-Work Task Type's Progress Tracking)

## Legend

Who: [What]  
>Action (Explanation)

Documents

MS Project Table:

MS Project 2010: Planning

MS Project 2010: Tracking

Note A: When [Offering SCE-Phases' Duration], ask the SCE Subject Matter Experts to provide his/her initial Duration estimate based on how many (Generic/Specific) resources he/she plan on using; record these info as Project Assumption Note. Later enter these assumptions into the "Note" section in the Ms Project. These info will be used as a resource assignment starting point when Calculation Baseline 1's Start and Finish Dates

Note B: When assign Vendor to the interim Outsource/ Vendor Own Phases: (1) Set Task Type as "Fixed Duration" (2) Create a "Pay-Vendor" Milestone Task, link all previous vendor phases as predecessors to this "Pay-Vendor" Milestone. (3) Assign Vendor as a Cost Resource type, and enter the "Cost" value in the Task Form Entry Panel

ERP: Enterprise Resource Pool or Resource Pool MPP  
> Generic Resources  
> Specific Resources

Appendix A  
To create a Fixed Duration task:  
1. Open Task Form Entry: Change the Type field to Fixed Duration  
2. Enter the Duration  
3. Enter the Resources  
4. Effort will be calculated by MS-Project

To create a Fixed Work task:  
1. Open Task Form Entry: Change the Type field to Fixed Work  
4. Enter the Effort in the Work field  
5. Enter the Resources  
6. Duration will be calculated by MS-Project