

Work Sessions

WORK SESSION #1 – CREATE A PROJECT PROPOSAL

We will be using the Light Rail Phase 2 project throughout the book. As each work session builds upon the previous one, it is important that you complete each work session based on the detailed instructions. Each work session ends with screen shots of the expected results, and detailed step by step instructions for completing each work session are also available in this download package. As well, we provide Microsoft Project schedules representing the results expected at the end of each work session to allow you to compare your results against ours and to ensure you always have an appropriate starting point for each exercise. These sample project schedules are also available in this download package.

These work sessions are applicable whether you are using Microsoft Project standalone or as part of a Project Online/Project Server environment. Although these work sessions assume you are using both PWA and Microsoft Project, where appropriate we call out specific instructions when standalone completion requires different actions.

We encourage you to work with your PWA administrator to get access to a training area to complete these exercises. If this is not possible, or you don't have PWA available in your organization, we always provide adjusted Work Session instructions to allow you to complete the segments that are specific to Microsoft Project.

This work session aims to initiate the project proposal in PWA. This exercise is intended for PWA users —if you do not have access to PWA, you can skip it in its entirety.

OBJECTIVE:

To initiate a project proposal by completing the 'Create a new project' page as well as any other project detail pages used in your organization for proposal approval.

Step 1 – Initiate a New Project Proposal

In PWA, create a new project proposal and ensure that you select a project type which is consistent with a software development project.

Step 2 – Complete the Proposal Details

Create a new proposal named 'ZZ Light Rail Phase 2 <Your Name>' (Where <Your Name> is your name, as others in your organization may also be completing these exercises).

Set the 'Proposed Start' to January 8, 2018 and the 'Proposed Finish' to March 30, 2018.

Complete the other fields on the 'Create a new project' page.

Step 3 – Complete additional information required

In our environment, the 'Strategic Impact' is also required before the proposal can be submitted for approval. Complete the Strategic Impact page, or any other required pages defined in your organization.

EXPECTED RESULTS

Create a new project

Project Initiation

Name *

Description

Project Departments ...

Proposed Start 
Requester proposed project start date.

Proposed Finish 
Requester proposed finish date.

Investment Category ...
Identify the investment category for this project.

Sponsor ...
Customer specific Executive Sponsor for this specific project.

Figure 1-1 Create a new project

The screenshot shows the Microsoft Project Online interface. At the top, there are tabs for 'BROWSE', 'PROJECT', and 'PAGE'. Below these are various icons for actions like 'Edit', 'Save', 'Close', 'Status', 'Submit', 'Options', 'Project Site', 'Build Team', 'Deliverables', 'Documents', 'Issues', 'Risks', 'Project Permissions', 'Previous', and 'Next'. The 'Save' button is highlighted with a red box.

The main content area shows the project 'ZZ Light Rail Phase 2 KS' and the 'Business Case' section. The 'Strategic Impact' section is active, displaying the title 'Project Strategic Impact' and the instruction 'Rate the impact of this project on the business drivers below.' There is a status bar indicating 'Status: Checked-out to you since 7/22/2016 9:18 AM Last Modified: 7/22/2016 9:18 AM'.

The form contains three sections for rating project impact on business drivers:

- Expand into new markets and segments**: Rate the impact of this project on the business drivers below.
 - No Rating
 - None: Does not grow revenue from any markets and segments
 - Low: Grows revenue from new markets and segments by up to \$500K
 - Moderate: Grows revenue from new markets and segments by \$500K to \$1M
 - Strong: Grows revenue from new markets and segments by \$1M to \$3M
 - Extreme: Grows revenue from new markets and segments by more than \$3M
- Improve Customer Satisfaction Score**: Measurably improve scores on customer satisfaction surveys through implementing standardized customer service processes, grow the number of customer service relationships, and improve the nature of each relationship.
 - No Rating
 - None: Does not change customer satisfaction index
 - Low: Increases customer satisfaction by up to 2%
 - Moderate: Increases customer satisfaction by 2% to 3%
 - Strong: Increases customer satisfaction by 3% to 5%
 - Extreme: Increases customer satisfaction by 5% or more
- Increase market share in existing markets**: Improve market share percentage or market position in already penetrated markets.
 - No Rating
 - None: Has no impact on market share
 - Low: Improves share in penetrated markets by less than 1%
 - Moderate: Improves share in penetrated markets by 1% to 3%
 - Strong: Improves share in penetrated markets by 7% to 15%
 - Extreme: Improves share in penetrated markets by more than 15%

Figure 1-2 Complete Strategic Impact

WORK SESSION #2 – IDENTIFY HIGH-LEVEL RESOURCE REQUIREMENTS

OBJECTIVE:

This work session loads the preliminary Light Rail Phase 2 skeleton project schedule into your training environment. For PWA users, the 'Resource Engagements' are also prepared to ensure that the high-level resource requirements are defined.

For non-PWA users, open the "Light Rail Phase 2" schedule obtained from the download site and skip to Step 4.

Step 1 Connect to Enterprise Environment

Launch Microsoft Project and log into your PWA environment.

Step 2 Load the Training Schedule

Open the "Light Rail Phase 2" schedule obtained from the download site and then save it to PWA using the **same** project name used in Work Session #1. You will receive a number of warning messages that you will be replacing an existing schedule and resources with this action – reply OK to these messages.

PLEASE NOTE – this action is required to load the starting Light Rail Phase 2 schedule needed for these work sessions into your environment and is not typical of preparing a project proposal.

Step 3 – Define the High-level Resource Requirements

At this point, named resources are not known, but the resource roles required for the project are, therefore you will select the required generic resources from the enterprise resource pool.

Confirm that there are three generic enterprise resources on the project: project manager, business analyst, and procurement specialist (or assign these roles appropriately to the generic roles defined by your organization).

All 'Resource Engagements' should use January 8, 2018 as the start date and March 30, 2018 as the end date.

Add 'Resource Engagements' for the project manager at 80% for the three-month duration; the business analyst at 80% for the first month, and then at 40% for the remaining two months; and the procurement specialist at 40% for the three months of the project. Provide meaningful descriptions for each 'Resource Engagement' so that the resource manager will understand the specifics for each request. Submit the 'Resource Engagements' for approval.

Step 4 - Complete Project Definition

Set the 'Start date' to January 8, 2018 and ensure that 'Calculate Resource Utilization from:' is set to 'Resource Engagements'.

Verify 'Standard' is set for the 'Project Calendar'.

Review and validate all other project custom fields defined by your organization. Any fields with an asterisk are mandatory and must be set before you can save the schedule back to PWA.

Publish and Check in your schedule.

Step 5 – Submit the Proposal for Approval

This step is not necessary if you are using Microsoft Project standalone (or if your organization does not use an automated governance workflow).

In PWA, submit the proposal to the next stage in the workflow.

EXPECTED RESULTS:

Name	Proposed Start	Proposed Finish	Proposed Max Units	Engagement Status	Details	Qtr 1, 2018		
						Jan	Feb	Mar
Procurement Specialist	Jan 8	Mar 30	40%		Prop. Max Units	40%	40%	40%
					Com. Max Units			
<i>Part time Procurement Specia</i>	<i>Jan 8</i>	<i>Mar 30</i>	<i>40%</i>	<i>Draft</i>	Prop. Max Units	40%	40%	40%
					Com. Max Units			
Project Manager	Jan 8	Mar 30	80%		Prop. Max Units	80%	80%	80%
					Com. Max Units			
<i>Full Time Project Manager</i>	<i>Jan 8</i>	<i>Mar 30</i>	<i>80%</i>	<i>Draft</i>	Prop. Max Units	80%	80%	80%
					Com. Max Units			
Business Analyst	Jan 8	Mar 30	80%		Prop. Max Units	80%	40%	40%
					Com. Max Units			
<i>Full time BA for the first month of the project</i>	<i>Jan 8</i>	<i>Jan 31</i>	<i>80%</i>	<i>Draft</i>	Prop. Max Units	80%		
					Com. Max Units			
<i>Part time BA for the final 2 months</i>	<i>Feb 1</i>	<i>Mar 30</i>	<i>40%</i>	<i>Draft</i>	Prop. Max Units		40%	40%
					Com. Max Units			

Figure 1-3 Resource Engagements

Project Information for 'ZZ Light Rail Phase 2 KS'

Start date: Jan 8 Current date: Aug 9

Finish date: Mar 26 Status date: Jan 14

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Calculate Resource Utilization from: Resource Engagements NA

Enterprise Custom Fields

Department: [Dropdown]

Custom Field Name	Value
Benefits	\$50,000,000,000.00
Cost KPI	Less than 10% over baseline cost
Investment Category	Transform
Location	Phoenix
Program	None
Project KPI	On Track
Project Phase	03 - Execute - Monitor & Control
Proposal Costs	\$5,000,000,000.00
Proposed Finish	Mar 30
Proposed 'Go Live' Date	Apr 1

Buttons: Help, Statistics..., OK, Cancel

Figure 1-4 Project Information

Workflow Stage Status: ZZ Light Rail Phase 2 KS

Status: Checked-out to you since 7/22/2016 10:29 AM Last Modified: 7/22/2016 10:25 AM

Workflow Status

1 - Proposal

1M - Initial Business Case | 2M - Department Review

Current Workflow Stage: 1M - Initial Business Case

Workflow Stage Status

The Initial Business Case stage has been completed and the business case has been submitted for department review.

Sections to be completed for this stage:

Pages below may require attention. Click "Next" in the ribbon above to scroll through each page or select an individual page by clicking on it below.

Page Name	Status	Description
Business Case	Complete	
Strategic Impact	Complete	This section captures how this Proposal impacts the Strategic Business Drivers

Figure 1-5 Workflow Stage Status

WORK SESSION #3 – COMPLETE THE WBS FOR THE PROJECT

OBJECTIVE:

This work session is focused on developing the WBS for the project. In this work session, we will complete the development of the WBS using the preliminary WBS loaded in the previous work session.

Step 1 – Add Project Start Milestone

Add a “Project Start” milestone to the beginning of the project

Step 2 – Add a new deliverable

Add the “Procurement Plan” deliverable with detailed tasks after the scope document deliverable, based on the following WBS:

Procurement Plan

- Determine Procurement Requirements

- Define and Publish Subcontractor Scope

- Identify Potential Subcontractors

- Identify Subcontract type

- Document Subcontractor Management Plan

- Procurement Plan complete

Step 3 – Add completion milestones

Add the following additional milestones:

- “Planning phase complete” at the end of the Planning phase.

- “Project complete” milestone at the end of the project.

Step 4 – Add task notes

Enter notes for one task.

EXPECTED RESULTS:

i	Task Mod	Task Name	Duration
		ZZ Light Rail Phase 2 Work Session 3	1 day
		<i>Project Start</i>	<i>0 days</i>
		Planning	1 day
		Scope Document	1 day
		Specify Deliverables and Acceptance Criteria	1 day
		Build Work Breakdown Structure	1 day
		Document Project Assumptions	1 day
		<i>Scope Document complete</i>	<i>0 days</i>
		Procurement Plan	1 day
		Determine Procurement Requirements	1 day
		Define and Publish Subcontractor Scope	1 day
		Identify Potential Subcontractors	1 day
		Identify Subcontractor Type	1 day
		Document Subcontractor Plan	1 day
		<i>Procurement Plan complete</i>	<i>0 days</i>
		Risk Management Plan	1 day
		Identify Project Risks	1 day
		Analyze Project Risks	1 day
		Document Risk Management Plan	1 day
		<i>Risk Management Plan complete</i>	<i>0 days</i>
		<i>Planning Complete</i>	<i>0 days</i>
		<i>Light Rail Phase 2 complete</i>	<i>0 days</i>

Figure 1-6 WBS Complete

WORK SESSION #4 – CREATE DEPENDENCIES:**OBJECTIVE:**

In this work session we will add the task dependencies required to develop the project schedule. Dependencies between project tasks are required to ensure the tasks are executed in the correct order.

We will follow the principle that dependencies should be developed from the end of the project and working upward.

Step 1 – Add task dependencies

Add the following dependencies to the schedule:

The “Planning Phase Complete” milestone is a predecessor of the “Project Complete” milestone.

The three deliverable completion milestones are predecessors of the “Planning Phase complete” milestone.

For the Risk Management Plan deliverable:

The “Document Risk Management Plan” milestone is a predecessor of the “Risk Management Plan complete” task.

The “Analyze Project Risks” task is a predecessor of the “Document Risk Management Plan” task.

The “Identify Project Risks” task is a predecessor of the “Analyze Project Risks” task.

The “Project Start” milestone is a predecessor of the “Identify Project Risks” task.

For the Procurement Plan deliverable:

The “Identify Potential Subcontractors”, “Identify Subcontractor Type” and “Document Subcontractor Management Plan” tasks are predecessors of the “Procurement Plan complete” milestone.

Two days after the “Identify Subcontractor Type” task starts the “Document Subcontractor Management Plan” can also start.

The “Define and Publish Subcontractor Scope” task is a predecessor to the “Identify Subcontractor Type” task.

The “Define and Publish Subcontractor Scope” task is a predecessor to the “Identify Potential Subcontractors” task, but there is also a 7-day lag before it can start.

The “Determine Procurement Requirements” task is a predecessor of the “Define and Publish Subcontractor Scope” task.

The “Scope Document complete” milestone is a predecessor to the “Determine Procurement Requirements”.

For the Scope Document deliverable:

The “Build Work Breakdown Structure” and “Document Project Assumptions” tasks are predecessors to the “Scope Document complete” milestone.

The “Specify Deliverables and Acceptance Criteria” is a predecessor to both the “Build Work Breakdown Structure” and “Document Project Assumptions” tasks.

The “Project Start” milestone is a predecessor of the “Specify Deliverables and Acceptance Criteria” task.

Step 2 – Validate dependencies

Validate that the dependency diagram is complete by running the following filters:

‘2a – Dependencies on Summary Tasks’,

‘2b – No Predecessors on Detailed Tasks/Milestone’ and

‘2c – No Successors on Detailed Tasks/Milestones’.

EXPECTED RESULTS:

	 Task Name	Predecessors	Successors
0	ZZ Light Rail Phase 2 KS		
1	<i>Project Start</i>		<i>16,4</i>
2	Planning		
3	Scope Document		
4	Specify Deliverables and Acceptance Criteria	1	5,6
5	Build Work Breakdown Structure	4	7
6	Document Project Assumptions	4	7
7	<i>Scope Document complete</i>	<i>5,6</i>	<i>20,9</i>
8	Procurement Plan		
9	Determine Procurement Requirements	7	10
10	Define and Publish Subcontractor Scope	9	12,11FS+7 days
11	Identify Potential Subcontractors	10FS+7 days	14
12	Identify Subcontractor type	10	14,13SS+2 days
13	Docment Subcontractor Management Plan	12SS+2 days	14
14	<i>Procurement Plan Complete</i>	<i>11,12,13</i>	<i>20</i>
15	Risk Management Plan		
16	Identify Project Risks	1	17
17	Analyze Project Risks	16	18
18	Document Risk Management Plan	17	19
19	<i>Risk Management Plan complete</i>	<i>18</i>	<i>20</i>
20	<i>Planning Phase complete</i>	<i>7,14,19</i>	<i>21</i>
21	<i>Project complete</i>	<i>20</i>	

03 - DEPENDENCIES

Figure 1-7 Create Dependencies



WORK SESSION #5 – SET DEADLINES AND CONSTRAINTS

OBJECTIVE:

This work session consists of setting a deadline and defining a constraint on the project to satisfy the stated business and organizational milestones.

Step 1 – Add a Deadline

Add a 'Deadline' to the "Light Rail Phase 2 complete" milestone and set it to the Friday, 8 weeks and 4 days after the project start date (Mar 9, 2018).

Step 2 – Add a Constraint

Add a 'Start No Earlier Than' constraint to the 'Identify Potential Subcontractors' task and set it to Tuesday, 3 weeks and 1 day after the project start date (January 30, 2018).

EXPECTED RESULTS:

	 Task Name	Deadline	Constraint Type	Constraint Date
0	ZZ Light Rail Phase 2 KS	NA	As Soon As Possible	NA
1	<i>Project Start</i>	NA	<i>As Soon As Possible</i>	NA
2	Planning	NA	As Soon As Possible	NA
3	Scope Document	NA	As Soon As Possible	NA
4	Specify Deliverables and Acceptance Criteria	NA	As Soon As Possible	NA
5	Build Work Breakdown Structure	NA	As Soon As Possible	NA
6	Document Project Assumptions	NA	As Soon As Possible	NA
7	<i>Scope Document complete</i>	NA	<i>As Soon As Possible</i>	NA
8	Procurement Plan	NA	As Soon As Possible	NA
9	Determine Procurement Requirements	NA	As Soon As Possible	NA
10	Define and Publish Subcontractor Scope	NA	As Soon As Possible	NA
11	 Identify Potential Subcontractors	NA	Start No Earlier Than	Jan 30
12	Identify Subcontractor type	NA	As Soon As Possible	NA
13	Document Subcontractor Management Plan	NA	As Soon As Possible	NA
14	<i>Procurement Plan Complete</i>	NA	<i>As Soon As Possible</i>	NA
15	Risk Management Plan	NA	As Soon As Possible	NA
16	Identify Project Risks	NA	As Soon As Possible	NA
17	Analyze Project Risks	NA	As Soon As Possible	NA
18	Document Risk Management Plan	NA	As Soon As Possible	NA
19	<i>Risk Management Plan complete</i>	NA	<i>As Soon As Possible</i>	NA
20	<i>Planning Phase complete</i>	NA	<i>As Soon As Possible</i>	NA
21	<i>Project complete</i>	Mar 9	<i>As Soon As Possible</i>	NA

Figure 1-8 Set Deadlines and Constraints

WORK SESSION #6 – BUILD THE TEAM AND ASSIGN RESOURCES

OBJECTIVE:

This work session continues the development of the baseline schedule and is focused on the identification of the named individuals who will be on the project team. With the team defined, we then ensure that resources are assigned to each task at the appropriate allocation level.

Step 1 – Build the Team

PWA USERS ONLY

Apply the 'B - Resource Sheet' view and use the 'Build Team' dialog, ensuring that the 'Booking Type' is set to 'Committed' for all resources:

Replace the project manager with yourself (we use Connie Campaign).

Replace the procurement specialist with an appropriate member of your organization (we use Bill Speker).

Replace the business analyst with a different appropriate member of your organization (we use Albert Connell).

PROJECT STANDALONE USERS ONLY

Using the 'B - Resource Sheet' view:

Replace the project manager with yourself.

Replace the procurement specialist with an appropriate member of your organization.

Replace the business analyst with a different appropriate member of your organization.

Step 2 – Assign Resources to Tasks

Use the '05 – Planning Gantt' view, assign yourself to all the 'Procurement Plan' detailed tasks at 40%.

Assign your procurement specialist colleague to 'Identify Potential Subcontractors' at 40%.

EXPECTED RESULTS:

Build Team for ZZ Light Rail Phase 2 CC

Filter enterprise resources
Existing filters: All Resources (No Filter)

Customize filters (optional)

Show resource availability
 Use project start and finish dates From: Jan 8 To: Jan 30
 Show resources with availability of or more than: 0h
 Include proposed bookings

Build team
Group by:

Enterprise Resource (148 found)	Avail
Albert Connell	
Albie Lopez	
Alex Cintron	
Andy Heck	
Anthony Cook	
Armando Reynoso	
Bill Speker	

Project Resources	Booking	Work
Albert Connell	Committed	8h
Bill Speker	Committed	0h
Connie Campaign	Committed	20h

Buttons: Add >, < Remove, Replace >

Figure 1-9 Build the Team

05 - PLANNING GANTT

Task	Task Name	Jan 7, '18	Jan 14, '18	Jan 21, '18	Jan 28, '18	Feb 4, '18	Feb 11, '18
0	ZZ Light Rail Phase 2 KS						
1	Project Start	1/8					
2	Planning						
3	Scope Document						
4	Specify Deliverables and Acceptance Criteria						
5	Build Work Breakdown Structure						
6	Document Project Assumptions						
7	Scope Document complete						
8	Procurement Plan						
9	Determine Procurement Requirements						
10	Define and Publish Subcontractor Scope						
11	Identify Potential Subcontractors						
12	Identify Subcontractor type						
13	Document Subcontractor Management Plan						
14	Procurement Plan Complete						
15	Risk Management Plan						
16	Identify Project Risks						
17	Analyze Project Risks						
18	Document Risk Management Plan						
19	Risk Management Plan complete						
20	Planning Phase complete						
21	Project complete						

Resource assignments in Gantt chart:
 - Connie Campaign[50%] (1/8 to 1/30)
 - Albert Connell (1/8 to 1/30)
 - Connie Campaign[50%] (1/8 to 1/30)
 - Connie Campaign[40%] (1/9 to 1/30)
 - Connie Campaign[40%] (1/9 to 1/30)
 - Connie Campaign[40%], Bill Speker[40%] (1/9 to 1/30)
 - Connie Campaign[40%] (1/9 to 1/30)
 - Connie Campaign[40%] (1/9 to 1/30)
 - Connie Campaign[50%] (1/10 to 1/30)
 - Connie Campaign[50%] (1/10 to 1/30)
 - Connie Campaign[50%] (1/10 to 1/30)

Figure 1-10 Resources Assigned

WORK SESSION #7 – ESTIMATE EFFORT

OBJECTIVE:

In this work session, we add the work and duration estimates to each task in the schedule. For effort based tasks, Microsoft Project will calculate the duration for each task based on these estimates and the resource availability defined in the previous work session.

Step 1 – Add effort estimates

Enter 'Work' estimates for following tasks:

Specify Deliverables and Acceptance Criteria – 8 hours

Build Work Breakdown Structure – 40 hours

Document Project Assumptions – 16 hours

Determine Procurement Requirements – 8 hours

Define and Publish Subcontractor Scope – 16 hours

Identify Subcontractor Type – 32 hours

Document Subcontractor Management Plan – 32 hours

Identify Project Risks – 20 hours

Analyze Project Risks – 10 hours

Document Risk Management Plan – 10 hours

Step 2 – Add 'Duration' estimates

For the 'Identify Potential Subcontractors' task, set the 'Task Type' to 'Fixed Duration' and give it a duration of 1 month.

EXPECTED RESULTS:

	Task Mod	Task Name	Work	Duration
0		ZZ Light Rail Phase 2 KS	320 hrs	41.5 days
1		<i>Project Start</i>	<i>0 hrs</i>	<i>0 days</i>
2		Planning	320 hrs	41.5 days
3		Scope Document	64 hrs	7 days
4		Specify Deliverables and Acceptance Criteria	8 hrs	2 days
5		Build Work Breakdown Structure	40 hrs	5 days
6		Document Project Assumptions	16 hrs	4 days
7		<i>Scope Document complete</i>	<i>0 hrs</i>	<i>0 days</i>
8		Procurement Plan	256 hrs	41.5 days
9		Determine Procurement Requirements	8 hrs	2.5 days
10		Define and Publish Subcontractor Scope	16 hrs	5 days
11		Identify Potential Subcontractors	128 hrs	1 mon
12		Identify Subcontractor type	32 hrs	10 days
13		Docment Subcontractor Management Plan	32 hrs	10 days
14		<i>Procurement Plan Complete</i>	<i>0 hrs</i>	<i>0 days</i>
15		Risk Management Plan	40 hrs	10 days
16		Identify Project Risks	20 hrs	5 days
17		Analyze Project Risks	10 hrs	2.5 days
18		Document Risk Management Plan	10 hrs	2.5 days
19		<i>Risk Management Plan complete</i>	<i>0 hrs</i>	<i>0 days</i>
20		<i>Planning Phase complete</i>	<i>0 hrs</i>	<i>0 days</i>
21		<i>Project complete</i>	<i>0 hrs</i>	<i>0 days</i>

Figure 1-11 Task Estimates

WORK SESSION #8 – RESOURCE WORKLOAD LEVELING
OBJECTIVE:

This work session is focused on ensuring that the resources assigned to the project are being utilized up to their assigned levels. The process of developing the schedule in the previous work sessions results in resource overallocations. This work session will resolve these and develop a project schedule that honors each resource’s allocation to the project.

Step 1 – Set ‘Max Units’ to match resource availability

Set ‘Max Units’ for the project manager 80%. Set the ‘Max Units’ for the business analyst and the procurement specialist to 40%.

Step 2 – Validate ‘Assignment Units’ on each task

Validate and correct any instances where resources are assigned to a task with ‘Assignment Units’ greater than that resource’s ‘Max Units’ (Hint: There should be one instance of this for the assignment to the “Build Work Breakdown Structure” task).

Step 3 – Identify overallocations and perform manual leveling

Review peak assignments for each resource to identify remaining overallocations. The project manager has a peak of 120%, which exceeds ‘Max Units’ of 80%, so we must take action to correct this.

Attempt to correct the overallocation of the project manager by reducing the ‘Assignment Units’ to 40% on all assigned tasks. We do this to address where two tasks are in parallel so that the total does not exceed the 80% ‘Max Units’ for this resource.

Step 4 – Apply the Microsoft Project leveling engine to resolve the remaining overallocations not resolved by manual leveling.

Level the project by setting the leveling options to ‘Day-by Day’ and ‘Priority, Standard’, and unselect all checkboxes in the ‘Resolving overallocations’ section. Validate the results using the ‘06 – Leveling Gantt’ view.

EXPECTED RESULTS:

	Resource Name	Max Units
🚩	Albert Connell	40%
	Bill Speker	40%
🚩	Connie Campaign	80%

Figure 1-12 Set Max Units

Resource Name	Max Units	Assignment Units
Unassigned	100%	
Albert Connell	40%	
<i>Build Work Breakdown Structure</i>		40%
Bill Speker	40%	
<i>Identify Potential Subcontractors</i>		40%
Connie Campaign	80%	
<i>Document Project Assumptions</i>		40%
<i>Identify Project Risks</i>		40%
<i>Specify Deliverables and Acceptance Criteria</i>		40%
<i>Analyze Project Risks</i>		40%
<i>Document Risk Management Plan</i>		40%
<i>Determine Procurement Requirements</i>		40%
<i>Docment Subcontractor Management Plan</i>		40%
<i>Define and Publish Subcontractor Scope</i>		40%
<i>Identify Potential Subcontractors</i>		40%
<i>Identify Subcontractor type</i>		40%

Figure 1-13 Set Assignment Units

Resource Name	Max Units	Assignment Units	Peak
Unassigned	100%		0%
Albert Connell	40%		40%
<i>Build Work Breakdown Structure</i>		40%	40%
Bill Speker	40%		40%
<i>Identify Potential Subcontractors</i>		40%	40%
Connie Campaign	80%		120%
<i>Document Project Assumptions</i>		40%	40%
<i>Identify Project Risks</i>		40%	40%
<i>Specify Deliverables and Acceptance Criteria</i>		40%	40%
<i>Analyze Project Risks</i>		40%	40%
<i>Document Risk Management Plan</i>		40%	40%
<i>Determine Procurement Requirements</i>		40%	40%
<i>Docment Subcontractor Management Plan</i>		40%	40%
<i>Define and Publish Subcontractor Scope</i>		40%	40%
<i>Identify Potential Subcontractors</i>		40%	40%
<i>Identify Subcontractor type</i>		40%	40%

Figure 1-14 Perform Manual Leveling

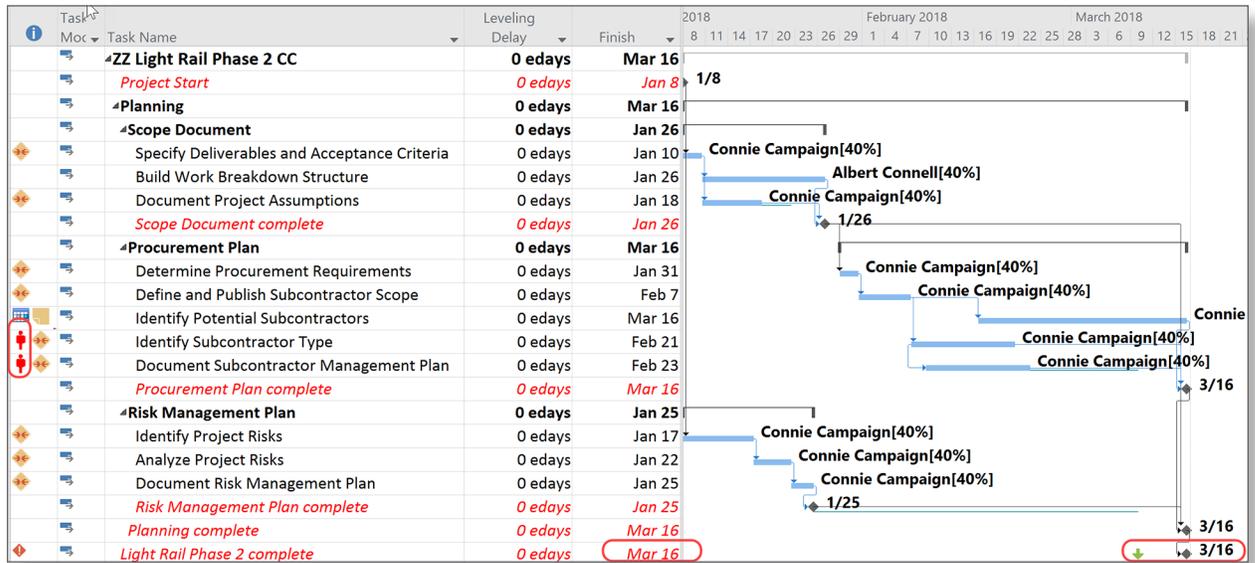


Figure 1-15 Schedule before leveling

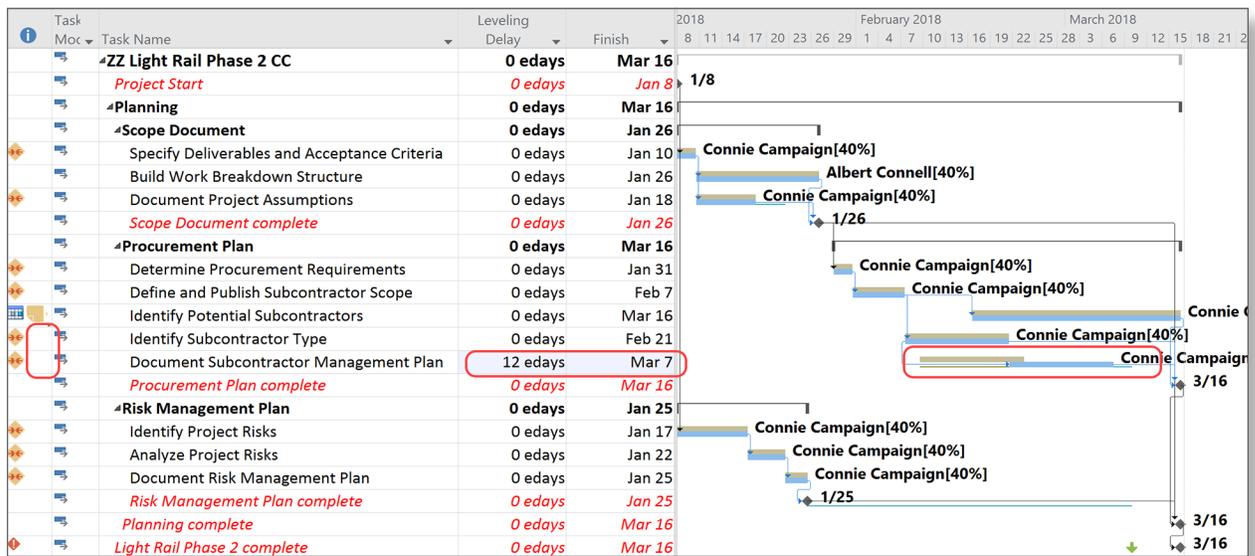


Figure 1-16 Schedule after leveling

WORK SESSION #9 – FINE-TUNE THE SCHEDULE
OBJECTIVE:

In this work session we will fine-tune the project schedule to address the two outstanding issues:

1. The required deadline is not being met.
2. A 'Resource Engagement' is required.

Step 1 – Adjust the schedule to meet the requested deadline.

At this point the schedule is missing the requested deadline. We know from the previous exercises we have adjusted the schedule as much as possible when we leveled the resources, so there are no opportunities to bring the finish date forward. Therefore, we schedule a meeting with the sponsor and negotiate a new deadline for the project. Adjust the deadline date to be later than originally planned.

Step 2 – Create Resource Engagement

You, as the project manager, are the only resource who has been classified as “high demand” and therefore requires a Resource Engagement. Create a Resource Engagement for yourself for the duration of the project and submit it for approval.

EXPECTED RESULTS:

Task Name	Deadline	ar 11, '18	Mar
		M	T W T F S S M
Document Risk Management Plan	NA		
<i>Risk Management Plan complete</i>	NA		
<i>Planning complete</i>	NA		
<i>Light Rail Phase 2 complete</i>	3/16/2018		3/16

Figure 1-17 Change the Project Deadline

The screenshot shows a dialog box titled "Engagement Information" with the following fields:

- Name: Albert Connell
- Resource: Connie Campaign
- Description: Full Time Project Manager
- Start: 1/8/18
- Finish: 3/16/18
- Allocate Resources by:
 - Units: 80%
 - Work
- Comments: (empty text area)

Buttons: Help, OK, Cancel

Figure 1-18 Create Resource Engagement

WORK SESSION #10 – PERFORMING BUDGET AND COST PLANNING

OBJECTIVE:

The next step to developing the baseline schedule is to ensure that all project costs are included and that the project budget reflects the full project costs. This work session will add 'Budget Cost' and 'Expense Cost' resources to the project to support project budget management.

Step 1 – This step is required ONLY for non-PWA users or for PWA users who do not have enterprise 'Budget Cost' and 'Expense Cost' resources.

Create an 'Expense Cost' resource for training and ensure that the 'Cost Type' is "Training".

Create 'Budget Cost' Resources for training (Cost Type is "Training") and labor (Cost Type is "Labor").

Ensure that the 'Cost Type' for all your 'Work' resources are set to "Labor".

Step 2 – This step is required ONLY for PWA users who have enterprise 'Budget Cost' and 'Expense Cost' resources.

Add 'Budget Cost' resources for "Labor" and "Training" to your project team.

Add an 'Expense Cost' resource for "Training" to your project team.

Step 3 – Create project budget

Create a project budget based on management's expectations of spending \$5,000 on training and \$40,000 on labor.

Step 4 – Plan non-resource costs

Plan for a \$5,000 expense on the "Build Work Breakdown Structure" task to cover initial vendor training.

Step 5 – Confirm the project budget

Review and confirm that the project expenses are consistent with the predefined budget expectations.

EXPECTED RESULTS:

Resource Name	Type	Material Label	Max Units	Booking Type	Cost Type
Type: Work					
Albert Connell	Work		100%	Committed	Labor
Bill Speker	Work		100%	Committed	Labor
Connie Campaign	Work		100%	Committed	Labor
Training	Cost			Committed	Training
Training Budget	Cost			Committed	Training
Labor Budget					

Resource Information	
General	Costs
Resource name:	Labor Budget
Initials:	L
Email:	
Group:	
Logon Account...:	
Code:	
Booking type:	Committed
Type:	Cost
Material label:	
Generic:	<input type="checkbox"/>
Budget:	<input checked="" type="checkbox"/>

Figure 1-19 Create Budget Resources

Task Name	Budget Cost
ZZ Light Rail Phase 2 KS	\$45,000.00
Labor Budget	\$40,000.00
Training Budget	\$5,000.00

Resource Name	R/D	Units	Cost
✓ Labor Budget			
✓ Training Budget			
Albert Connell			

Figure 1-20 Create Project Budget

Task Name	Budget Cost	Cost
Build Work Breakdown Structure		\$10,000.00
Albert Connell		\$5,000.00
Training Expense		\$5,000.00
Document Project Assumptions		\$2,000.00
Connie Campaign		\$2,000.00

Resource Name	R/D	Units	Cost
✓ Albert Connell		40%	\$5,000.00
✓ Training Expense			\$5,000.00
Bill Speker			
Connie Campaign			
Labor Budget			

Figure 1-21 Plan non-resource costs

WORK SESSION #11 – SET THE ORIGINAL BASELINE AND PUBLISH

OBJECTIVE:

This work session finalizes the development of the baseline schedule by saving the original baseline. The baseline will be used during project execution to validate progress against the approved schedule.

Step 1 – Set Project Baseline

Set the baseline for the entire project.

Step 2 – Preserve Original Baseline

Copy the 'Baseline' into 'Baseline1' to preserve a copy of the original baseline for future reporting and comparisons.

Step 3 – Set Resource Utilization and Phase

From the 'Project ribbon > Properties section' click the 'Project Information' button to launch the 'Project Information' dialog. Change the 'Calculate Resource Utilization from' field from 'Resource Engagements' to 'Project Plan' (if you are not utilizing PWA, skip this step). Also change the 'Project Phase' to indicate that the project has moved into the delivery stage.

Step 4 – Publish Project Schedule

Click the 'File' button to open the 'Backstage. Click the 'Publish' button to publish the completed project schedule to PWA (if you are not utilizing PWA, skip this step).

EXPECTED RESULTS:

Task Name	Work Health	Baseline Work	Work	Work Variance	Schedule Health	Baseline Finish	Finish	Finish Variance	Cost Health
ZZ Light Rail Phase 2 CC	●	320 hrs	320 hrs	0 hrs	●	Mar 16	Mar 16	0 days	●
<i>Project Start</i>	■	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	■	<i>Jan 8</i>	<i>Jan 8</i>	<i>0 days</i>	■
Planning	●	320 hrs	320 hrs	0 hrs	●	Mar 16	Mar 16	0 days	●
Scope Document	●	64 hrs	64 hrs	0 hrs	●	Jan 26	Jan 26	0 days	●
Specify Deliverables and Acceptance Crite	●	8 hrs	8 hrs	0 hrs	●	Jan 10	Jan 10	0 days	●
Build Work Breakdown Structure	●	40 hrs	40 hrs	0 hrs	●	Jan 26	Jan 26	0 days	●
Document Project Assumptions	●	16 hrs	16 hrs	0 hrs	●	Jan 18	Jan 18	0 days	●
<i>Scope Document complete</i>	■	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	■	<i>Jan 26</i>	<i>Jan 26</i>	<i>0 days</i>	■
Procurement Plan	●	216 hrs	216 hrs	0 hrs	●	Mar 16	Mar 16	0 days	●
Determine Procurement Requirements	●	8 hrs	8 hrs	0 hrs	●	Jan 31	Jan 31	0 days	●
Define and Publish Subcontractor Scope	●	16 hrs	16 hrs	0 hrs	●	Feb 7	Feb 7	0 days	●
Identify Potential Subcontractors	●	128 hrs	128 hrs	0 hrs	●	Mar 16	Mar 16	0 days	●
Identify Subcontractor Type	●	32 hrs	32 hrs	0 hrs	●	Feb 21	Feb 21	0 days	●
Document Subcontractor Management P	●	32 hrs	32 hrs	0 hrs	●	Mar 7	Mar 7	0 days	●
<i>Procurement Plan complete</i>	■	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	■	<i>Mar 16</i>	<i>Mar 16</i>	<i>0 days</i>	■

Figure 1-22 Project Baseline

Project Information for 'ZZ Light Rail Phase 2 CC'

Start date: Jan 8 Current date: Aug 2

Finish date: Mar 16 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Calculate Resource Utilization from:

Project Plan NA

Enterprise Custom Fields

Department:

Custom Field Name	Value
Benefits	\$0.00
Cost KPI	Less than 10% over baseline cost
Investment Category	Transform
Location	
Program	Venus
Project KPI	
Project Phase	03 - Execute - Monitor & Control
Proposal Costs	\$0.00
Proposed Finish	Mar 30
Proposed 'Go Live' Date	NA

Help Statistics... OK Cancel

Figure 1-23 Set Resource Utilization

WORK SESSION #12 – SUBMITTING A TIMESHEET

OBJECTIVE:

To provide task status through the PWA Timesheet.

Step 1 – Track Project Time

Provide task status through the PWA Timesheet. (If you do not have PWA, enter the same timesheet information directly into Microsoft Project using the 'A – Resource Usage' view.)

Use the timesheet for the first week (January 08, 2018 – January 14, 2018) of the project:

No time recorded against the project on Monday or Tuesday as you were delayed starting the project.

Wednesday: 4 hours on 'Specify Deliverables and Acceptance Criteria'.

Thursday: 2 hours on 'Specify Deliverables and Acceptance Criteria'.

Increase 'Remaining Work' to 10 hours on 'Specify Deliverables and Acceptance Criteria' and enter a comment to reflect the reason why the time was increased: '5 new deliverables identified which will require 10 more hours'.

Step 2 – Track Administrative Time (Non PWA users can skip this step)

For Monday, record 8 hours to 'Support'.

For Tuesday, record 8 hours to 'Support'.

For Wednesday, record 4 hours to 'Support'.

For Thursday, record 6 hours to 'Support'.

For Friday, record 8 hours to 'Support'.

Step 3 – Submit Timesheet

Submit the timesheet for approval.

EXPECTED RESULTS:

⚠ Your timesheet has unsaved changes Total: 40h Period: 1/8/2018 12:00 AM - 1/14/2018 11:59 PM								
Task Name/Description ↑	Comments	Remaining Work	Time Type	Mon 1/8	Tue 1/9	Wed 1/10	Thu 1/11	Fri 1/12
<input type="checkbox"/> Document Project Assumptions		16h	Actual					
			Planned			1.6h	3.2h	3.2h
<input type="checkbox"/> Identify Project Risks		20h	Actual					
			Planned	3.2h	3.2h	3.2h	3.2h	3.2h
<input type="checkbox"/> Specify Deliverables and Acceptance Criteria	Additional Delive	10h	Actual			4h	2h	
			Planned			4h	2h	2h
<input type="checkbox"/> Administrative			Actual					
			Planned					8h
<input type="checkbox"/> Sick			Actual					
			Planned					
<input type="checkbox"/> Support			Actual	8h	8h	4h	6h	0h
			Planned					
<input type="checkbox"/> Vacation			Actual					
			Planned					
			Actual	8h	8h	8h	8h	8h
			Planned	3.2h	3.2h	8.8h	8.4h	8.4h

Figure 1-24 PWA Timesheet

Resource Name	Max U	Details	Jan 7, '18					
			S	M	T	W	T	F
Connie Campaign		Work		3.2h	3.2h	7.2h	5.2h	6.4h
		Act. Wc				4h	2h	
<u>Specify Deliverables and Acceptance Criteria</u>		Work				4h	2h	2h
		Act. Wc				4h	2h	
<u>Document Project Assumptions</u>		Work						1.2h
		Act. Wc						
<u>Determine Procurement Requirements</u>		Work						
		Act. Wc						
<u>Define and Publish Subcontractor Scope</u>		Work						
		Act. Wc						
<u>Identify Potential Subcontractors</u>		Work						
		Act. Wc						
<u>Identify Subcontractor type</u>		Work						
		Act. Wc						
<u>Docment Subcontractor Management Plan</u>		Work						
		Act. Wc						
<u>Identify Project Risks</u>		Work		3.2h	3.2h	3.2h	3.2h	3.2h
		Act. Wc						
<u>Analyze Project Risks</u>		Work						
		Act. Wc						
<u>Document Risk Management Plan</u>		Work						
		Act. Wc						

Figure 1-25 Microsoft Project Resource Usage (for non-PWA users)

WORK SESSION 13 – PROJECT COLLABORATION**OBJECTIVE:**

To work with the Project Site to create an issue and upload a document. This work session is completed only in PWA. Skip this entire work session if you are not using PWA.

Step 1 – Create a new issue

As a result of a conversation with the project sponsor, you have a concern that the anticipated increase in business volumes to the east end will overload the network connections between there and the home office. Create a new issue to record this, and assign it to yourself with a due date two weeks from now.

Step 2 – Upload a project document

Upload a document from your computer to the project document library, and ensure that the appropriate document property fields defined for your organization are filled in to help manage this project repository.

EXPECTED RESULTS:

Title *	Business Unit Availability
Owner	Connie Campaign x
Assigned To	Bill Speker x
Status	(1) Active ▾
Category	Resource ▾
Priority	(2) Medium ▾
Due Date	1/28/18  12 AM ▾ 00 ▾
Discussion	Jan 7 - CC - Inpsite of assurances during project startup, the business unit resources are not able to free themselves from regular business activities to participate in required workshops Click for help about adding basic HTML formatting.
Resolution	Jan 18 - BS - Business managemen is exploring hiring temporary staff

Figure 1-26 Create a project issue

Top 5 Active Issues

[+ new item](#) or [edit this list](#)

Current View ...

✓	Title	Assigned To	Category	Priority	Due Date
	Business Unit Availability *	<input type="checkbox"/> Bill Speker	Resource	(2) Medium	1/28/2018 12:00 AM

Top 5 Active Risks

[+ new item](#) or [edit this list](#)

Current View ...

✓ Title Assigned To Category Exposure Due Date

There are no items to show in this view of the "Risks" list.

Recently Changed Documents

[+ New](#) [↑ Upload](#) [↻ Sync](#) [↻ Share](#) More ▾

Current View ...

✓	📄	Name	Modified	Owner	Modified By	Status
	📄	Weekly Team Status Meeting Jan 8 *	A few seconds ago	<input type="checkbox"/> Connie Campaign	<input type="checkbox"/> Connie Campaign	Final

Figure 1-27 Upload a project document

WORK SESSION #14 – PROCESS STATUS UPDATES

OBJECTIVE:

Process the weekly project status updates to ensure that the schedule accurately reflects the current delivery status.

Step 1 – Confirm all timesheets have been entered

Validate all timesheets have been entered by running the 'Timesheet Compliance by Week' report and validate that there are no exceptions for this timesheet period (Jan 08, 2018 – January 14, 2018). (If you do not have PWA, Steps 1-4 are not necessary, as you entered the timesheets directly in Microsoft Project through the previous exercise and therefore, would be aware of any missing timesheets.)

Step 2 – Review submitted status updates

Review the schedule changes resulting from the status updates using the 'Preview Updates' process in PWA.

Step 3 – Accept Status Updates

Accept the status updates in PWA.

Step 4 – Update Status Date

Open the schedule in Microsoft Project and set the status date to the Sunday at the end of the timesheet period (January 14, 2018). (This assumes that timesheet periods run from Monday through Sunday. Your organization may have a different weekly timesheet cycle.)

Step 5 – Mark milestones as complete

Update the 'Project Start' milestone to reflect the fact that the project has started.

Step 6 – Record Actual Costs

Record \$3,000 actual cost for training on the 'Develop Work Breakdown Structure' task. Leave the \$2,000 remaining cost for a future time period.

EXPECTED RESULTS:

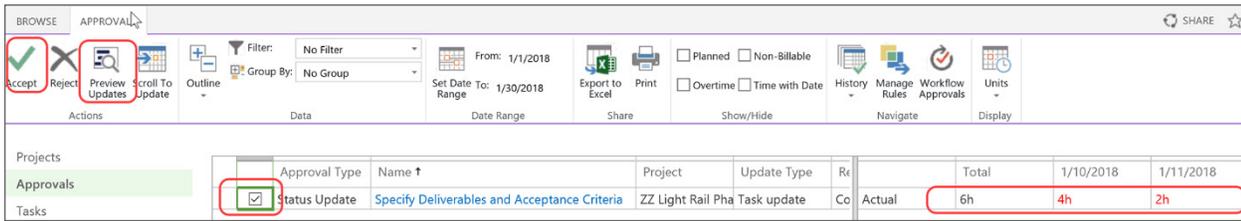


Figure 1-28 Review and Approve Status Updates

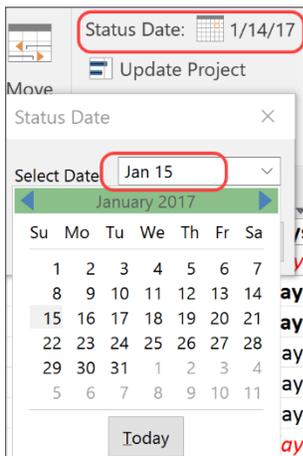


Figure 1-29 Update Status Date

Task Name	Actual Cost	Remaining Cost	Total Cost	Details	1/7	1/14	1/21
#Build Work Breakdown Structure	\$3,000.00	\$7,000.00	\$10,000.00	Cost		\$3,750.00	\$2,000.00
Albert Connell	\$0.00	\$5,000.00	\$5,000.00	Act. Cost		\$3,000.00	\$0.00
Training Expense	\$3,000.00	\$2,000.00	\$5,000.00	Cost		\$750.00	\$2,000.00
				Act. Cost		\$3,000.00	\$0.00
				Act. Cost		\$3,000.00	\$0.00

Figure 1-30 Enter Non-Resource Actual Costs

WORK SESSION #15 – WEEKLY SCHEDULE MAINTENANCE

OBJECTIVE:

Review the project schedule performance to the baseline and take corrective action as needed.

Step 1 – Reschedule uncompleted work

To ensure that there is no uncompleted work in the past, reschedule all uncompleted work beyond the 'Status' date – January 14, 2018.

Step 2 – Address schedule slippage

Review the project schedule to determine if it is necessary to reschedule and/or change resource assignments based on the status updates processed. In this case, as the task updates from one team member have resulted in schedule slippage and missing the delivery deadline, we will follow the "Identify Variance and Take Corrective Actions" process. On examination of the details, you determine that you (the project manager) have the availability and skills to help on the 'Build Work Breakdown Structure' task, and assign yourself at 40%. While this allows the project to satisfy the deadline, you are now overallocated on several tasks, so the next step is to level the resources. Validate the leveling options are set to 'Level only within available slack', and then run 'Level All'. Verify that this resolves the overallocation, and that you are still able to achieve the requested delivery deadline.

Step 3 – Review Budget performance

Validate the financial performance of the project by reviewing current costs against the budget costs. As the estimate for one task has increased, the project cost projection has also increased. As this increase is necessary, you will accept this cost overrun and report on it accordingly.

Step 4 – Update KPIs

Review and update the Project KPI to be on track, as the single overrun is not significant enough to put the project "On Watch".

EXPECTED RESULTS:

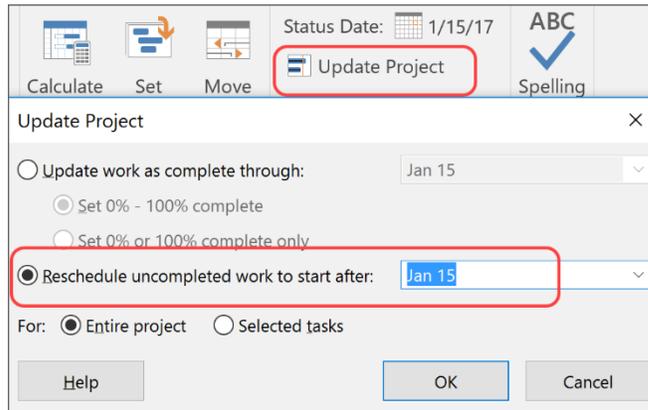


Figure 1-31 Reschedule incomplete work in the past

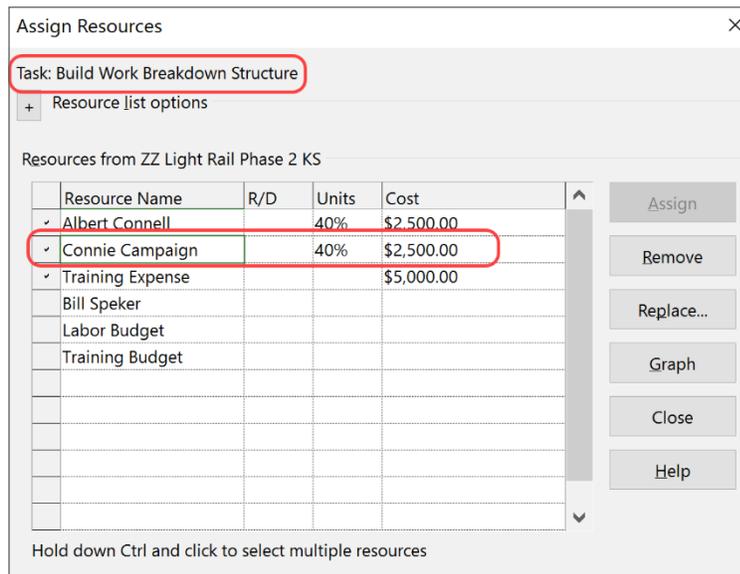


Figure 1-32 Add Resource to task

Task Name	Work	Actual Work	Remaining Work	Remaining Duration	Actual Start	Actual Finish	Start	Finish
ZZ Light Rail Phase 2 KS	328 hrs	6 hrs	322 hrs	53.68 days	Jan 8	NA	1/8/2018	Mar 26
<i>Project Start</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 days</i>	<i>Jan 8</i>	<i>Jan 8</i>	<i>Jan 8</i>	<i>Jan 8</i>
Planning	328 hrs	6 hrs	322 hrs	53.68 days	Jan 8	NA	Jan 8	Mar 26
Scope Document	72 hrs	6 hrs	66 hrs	16.35 days	Jan 10	NA	Jan 10	Feb 5
Specify Deliverables and Acceptance Criteria	16 hrs	6 hrs	10 hrs	3.13 days	Jan 10	NA	Jan 10	Jan 18
Build Work Breakdown Structure	40 hrs	0 hrs	40 hrs	6.25 days	Jan 18	NA	Jan 18	Feb 5
Document Project Assumptions	16 hrs	0 hrs	16 hrs	5 days	NA	NA	Jan 18	Jan 25
<i>Scope Document complete</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 days</i>	<i>NA</i>	<i>NA</i>	<i>Feb 5</i>	<i>Feb 5</i>
Procurement Plan	256 hrs	0 hrs	256 hrs	55.13 days	NA	NA	Jan 8	Mar 26
Determine Procurement Requirements	8 hrs	0 hrs	8 hrs	2.5 days	NA	NA	Feb 5	Feb 8
Define and Publish Subcontractor Scope	16 hrs	0 hrs	16 hrs	5 days	NA	NA	Feb 8	Feb 15
Identify Potential Subcontractors	128 hrs	0 hrs	128 hrs	1 mon	NA	NA	Feb 26	Mar 26
Identify Subcontractor type	32 hrs	0 hrs	32 hrs	10 days	NA	NA	Feb 15	Mar 1
Docment Subcontractor Management Plan	32 hrs	0 hrs	32 hrs	10 days	NA	NA	Mar 1	Mar 15
<i>Procurement Plan Complete</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 days</i>	<i>NA</i>	<i>NA</i>	<i>Mar 26</i>	<i>Mar 26</i>
Risk Management Plan	40 hrs	0 hrs	40 hrs	19.38 days	NA	NA	Jan 8	Feb 2
Identify Project Risks	20 hrs	0 hrs	20 hrs	6.25 days	NA	NA	Jan 8	Jan 17
Analyze Project Risks	10 hrs	0 hrs	10 hrs	3.13 days	NA	NA	Jan 25	Jan 30
Document Risk Management Plan	10 hrs	0 hrs	10 hrs	3.13 days	NA	NA	Jan 30	Feb 2
<i>Risk Management Plan complete</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 days</i>	<i>NA</i>	<i>NA</i>	<i>Feb 2</i>	<i>Feb 2</i>
<i>Planning Phase complete</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 days</i>	<i>NA</i>	<i>NA</i>	<i>Mar 26</i>	<i>Mar 26</i>
<i>Project complete</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 hrs</i>	<i>0 days</i>	<i>NA</i>	<i>NA</i>	<i>Mar 26</i>	<i>Mar 26</i>

Figure 1-33 Results of replanning activity

Task Name	Actual Cost	Remaining Cost	Total Cost	Cost Variance
ZZ Light Rail Phase 2 KS	\$3,750.00	\$42,250.00	\$46,000.00	\$1,000.00
<i>Labor Budget</i>				
<i>Training Budget</i>				
<i>Project Start</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$0.00</i>
Planning	\$3,750.00	\$42,250.00	\$46,000.00	\$1,000.00
Scope Document	\$3,750.00	\$10,250.00	\$14,000.00	\$1,000.00
Specify Deliverables and Acceptance Crite	\$750.00	\$1,250.00	\$2,000.00	\$1,000.00
<u>Connie Campaign</u>	<u>\$750.00</u>	<u>\$1,250.00</u>	<u>\$2,000.00</u>	<u>\$1,000.00</u>

Figure 1-34 Review Budget Performance

Task Name	% Work Complete	Work	Cost Health	Schedule Health	Work Health	Finish
ZZ Light Rail Phase 2 KS	2%	328 hrs	●	●	●	Mar 26
<i>Project Start</i>	<i>100%</i>	<i>0 hrs</i>	■	■	■	<i>Jan 8</i>

Project Information for 'ZZ Light Rail Phase 2 KS'

Start date: Jan 8 Current date: Jul 29

Finish date: Mar 26 Status date: Jan 15

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Calculate Resource Utilization from:

Project Plan NA

Enterprise Custom Fields

Department:

Custom Field Name	Value
Program	None
Project KPI	On Track
Project Phase	On Track
Proposal Costs	On Watch
Proposed Finish	Troubled

Figure 1-35 Review and update KPIs

WORK SESSION #16 – PROCESS PROJECT CHANGE REQUEST**OBJECTIVE:**

Process an approved project change request and update the project baseline to include the approved changes.

Step 1 – Add tasks to the schedule

Management has notified you that based on recommendations from the vendor, they approve adding an additional task to your schedule to review the project risks with the vendor to ensure adequate risk mitigation plans are in place. You negotiate with management that 16 hours will be required to complete this task. Insert this task into the schedule prior to 'Document Risk Management Plan', assign it to yourself at 40%, and make the appropriate changes to the existing dependencies.

Step 2 – Obtain formal approval of schedule changes

Review and validate the impact this change has on the overall project schedule, and obtain final management approval of the changes.

Step 3 – Update the Project Baseline

With Management approval of the change, add the new and changed tasks to the Project Baseline.

EXPECTED RESULTS:

Task Name	% Work Complete	Work	Cost Health	Schedule Health	Work Health	Finish	Finish Variance	Deadline
ZZ Light Rail Phase 2 KS	2%	344 hrs	●	●	●	Mar 26	5.63 days	NA
<i>Project Start</i>	<i>100%</i>	<i>0 hrs</i>	■	■	■	<i>Jan 8</i>	<i>0 days</i>	<i>NA</i>
Planning	2%	344 hrs	●	●	●	Mar 26	5.63 days	NA
Scope Document	8%	72 hrs	●	●	●	Feb 5	5.63 days	NA
Specify Deliverables and Acceptance Crite	38%	16 hrs	●	●	●	Jan 18	5.63 days	NA
Build Work Breakdown Structure	0%	40 hrs	●	●	●	Feb 5	5.63 days	NA
Document Project Assumptions	0%	16 hrs	●	●	●	Jan 25	5.63 days	NA
<i>Scope Document complete</i>	<i>0%</i>	<i>0 hrs</i>	■	■	■	<i>Feb 5</i>	<i>5.63 days</i>	<i>NA</i>
Procurement Plan	0%	272 hrs	●	●	●	Mar 26	5.63 days	NA
Determine Procurement Requirements	0%	8 hrs	●	●	●	Feb 8	5.63 days	NA
Define and Publish Subcontractor Scope	0%	16 hrs	●	●	●	Feb 15	5.63 days	NA
Identify Potential Subcontractors	0%	128 hrs	●	●	●	Mar 26	5.63 days	NA
Identify Subcontractor type	0%	32 hrs	●	●	●	Mar 1	5.63 days	NA
Docment Subcontractor Management Pla	0%	32 hrs	●	●	●	Mar 15	5.63 days	NA
<i>Procurement Plan Complete</i>	<i>0%</i>	<i>0 hrs</i>	■	■	■	<i>Mar 26</i>	<i>5.63 days</i>	<i>NA</i>
Risk Management Plan	0%	56 hrs	●	●	●	Feb 9	3.13 days	NA
Identify Project Risks	0%	20 hrs	●	●	●	Jan 17	1 day	NA
Analyze Project Risks	0%	10 hrs	●	●	●	Jan 30	6.88 days	NA
Review Risks with SAS Vendor	0%	16 hrs	●	●	●	Feb 6	0 days	NA
Document Risk Management Plan	0%	10 hrs	●	●	●	Feb 9	11.88 days	NA
<i>Risk Management Plan complete</i>	<i>0%</i>	<i>0 hrs</i>	■	■	■	<i>Feb 9</i>	<i>11.88 days</i>	<i>NA</i>
<i>Planning Phase complete</i>	<i>0%</i>	<i>0 hrs</i>	■	■	■	<i>Mar 26</i>	<i>5.63 days</i>	<i>NA</i>
<i>Project complete</i>	<i>0%</i>	<i>0 hrs</i>	■	■	■	<i>Mar 26</i>	<i>5.63 days</i>	<i>3/26/2018</i>

Figure 1-36 Change Request Processed

WORK SESSION #17 – PROJECT STATUS REPORTING

OBJECTIVE:

Provide an accurate status of the project to project stakeholders.

Step 1 – Project Timeline

Develop a project timeline suitable for submitting to management as part of a project status report.

(The remaining steps are performed in PWA. Therefore, if you are using Microsoft Project standalone, while we would expect that you would perform these steps, you would complete them as appropriate for the tools being used in your organization).

Step 2 – Review and Update Issues, Risks, and Action items

Review and update all issues, risks, and action items in preparation for reporting current project status.

Step 3 – Create Weekly Status Narrative

Create a new 'Project Status' entry to reflect the current state of the project. Report that currently there is a slight overrun but it remains within the "On Track" status.

Step 4 – Review Project Status report

Produce the 'Project Status Report' and validate that the information reported is appropriate for review by management.

EXPECTED RESULTS

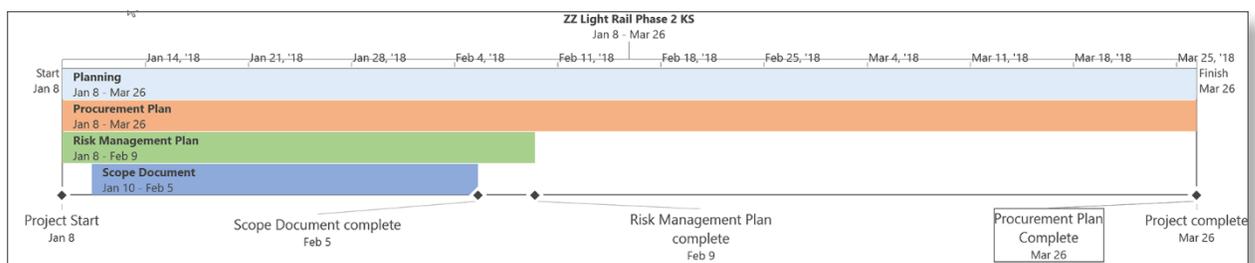


Figure 1-37 Project Timeline

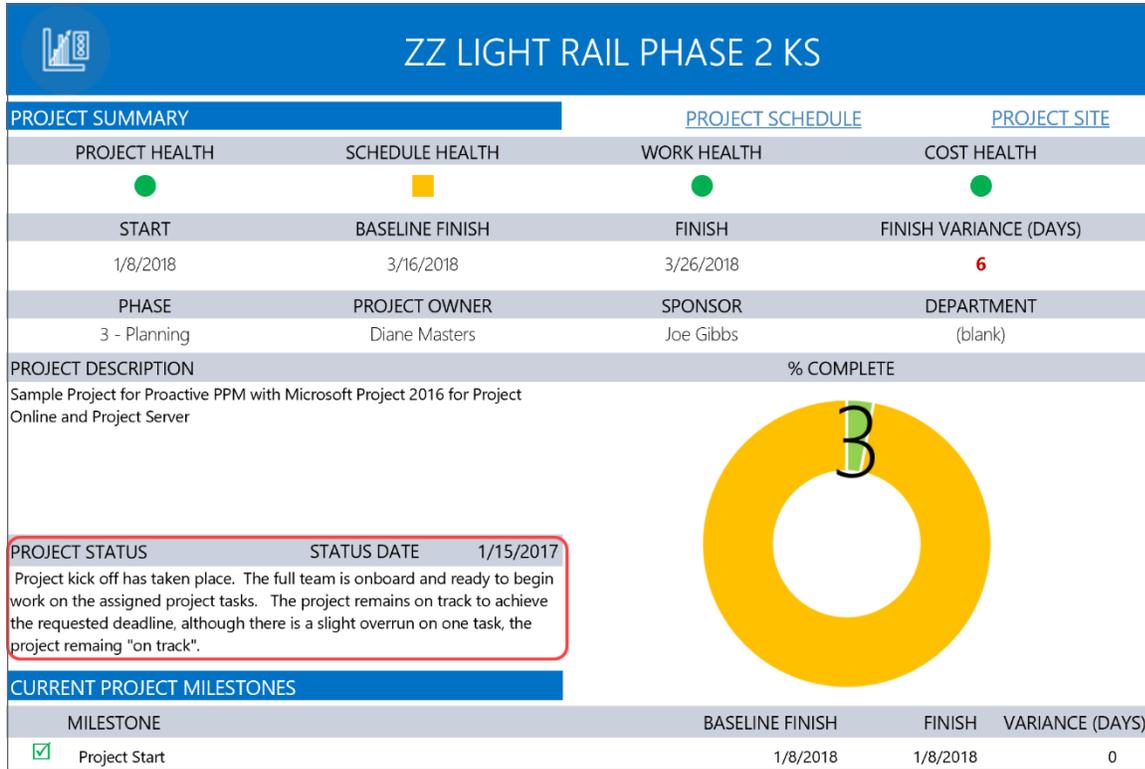


Figure 1-38 Project Status Report