

In ProjectLink when you update an activity have the Plan highlight dates that have been affected by the update.

Created on Mar 19, 2015 1:16 PM by Kristopher Pizzarelli - Last Modified: Mar 20, 2015 8:50 AM

7

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ProjectLink Plans

When you create the plan you have estimated start and finish dates that project the plans duration. As you input actual dates the estimated dates can change due to the new actual dates. We would like to see the estimated plan dates that have changed due to the actual dates. We would like to see them be highlighted so that you can review the effects of the plans actual run time.

I opened a case for the situation here are some of the correspondence during that case and how I ultimately was sent here to this forum to try and accomplish this enhancement.

Our customer would like to see all the estimated dates in a project Plan that are affected by the change of a activity in the beginning of the plan.

- First the Plan is created with all estimated dates.
- Then as activities are finished the actual dates are imputed and can possibly change the estimated dates following in the plan.
- If an estimated date is affected the customer would like it highlighted so that they can review what change happened

You opened case 12442809 with PTC Technical Support on 3/12/2015, with the following description: In ProjectLink if you modify a predecessor activity, it can change other activities in the plan. We would like to have all the dates that changed because of that initial change be highlighted..

After further investigation, it has been determined that the functionality you are looking for is not currently part of the application specification.

If you would like this feature to be implemented in a future release, I would recommend filing an Enhancement Request via the PTC Website for this functionality: http://www.ptc.com/appserver/cs/misc/PTC_Enhancement_Process.jsp .

Categories: PTC Navigate

Tags:



Marco Tosin Mar 20, 2015 5:24 AM

Kristopher,
you have to vote up for your idea.

Actions

Like (0)



Scott Morris Mar 23, 2015 7:24 AM

This is a great suggestion. Managing change in Plan is always challenging and the more ways PTC can provide visibility into proposed or actual changes, the more beneficial the plan becomes for the Project Manager and those responsible for its Activities and Deliverables.

Actions

Like (0)



Alex Saji Apr 6, 2015 3:57 PM (in response to Scott Morris)

Thanks Scott !

This has been the biggest complaint from the PM team about using ProjectLink so far. Today we use Projects in AUto Execute mode, as the Plan progress through the list of activities, the dates get changed from the original planned dates set by the PM team. As you know in auto execution mode all the activities take the date when the activity was started changing the initial planned date before the start of the activity in the Plan.

PM have no way to go and see when he initially had that plan activity , planned to start and finish.

If there is a way PTC can implement the feature where there is a column that will keep the initial planned dates of start and finish that will be great.

Actions

Like (0)



Caitlin Wheeless Apr 13, 2015 1:14 PM (in response to Alex Saji)

At 10.2 M030 we added a "baseline" feature that accomplishes this. It works for both manual and automatic execution EPP projects.

Plan baselines records all attributes for current plan objects -- activities, deliverables, resources, resource assignments, overall plan. activity attributes.

You can see changes between baseline values using the "Variance Report" table view (or create your own custom view using the various "Baseline" table columns).

You can create any number of baselines. All current information is automatically captured. You can do this from the Plan table or Plan information page.

For example:

1. Create a new auto-execution plan with two activities:

A1

Estimated Start April 7

Estimated Finish April 14

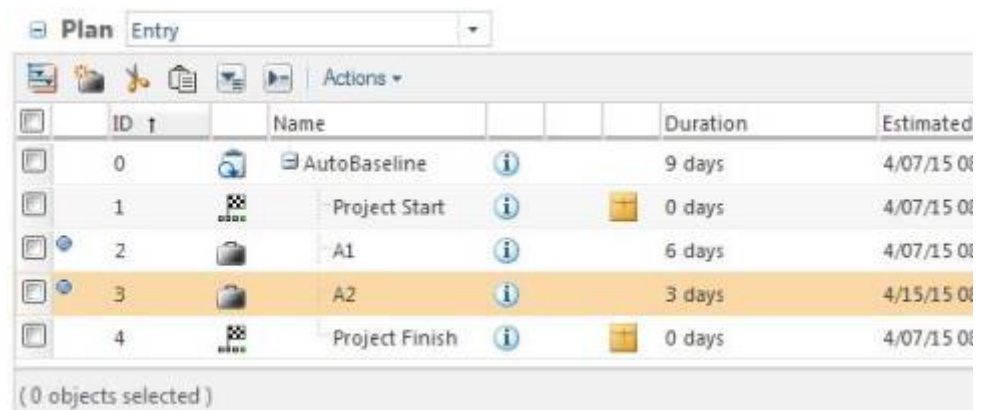
(Duration 6 days)

A2 -- Use A1 as FS predecessor; A2 cannot start until A1 completes

Estimated Start April 15

Estimated Finish April 17

(Duration 3 days)

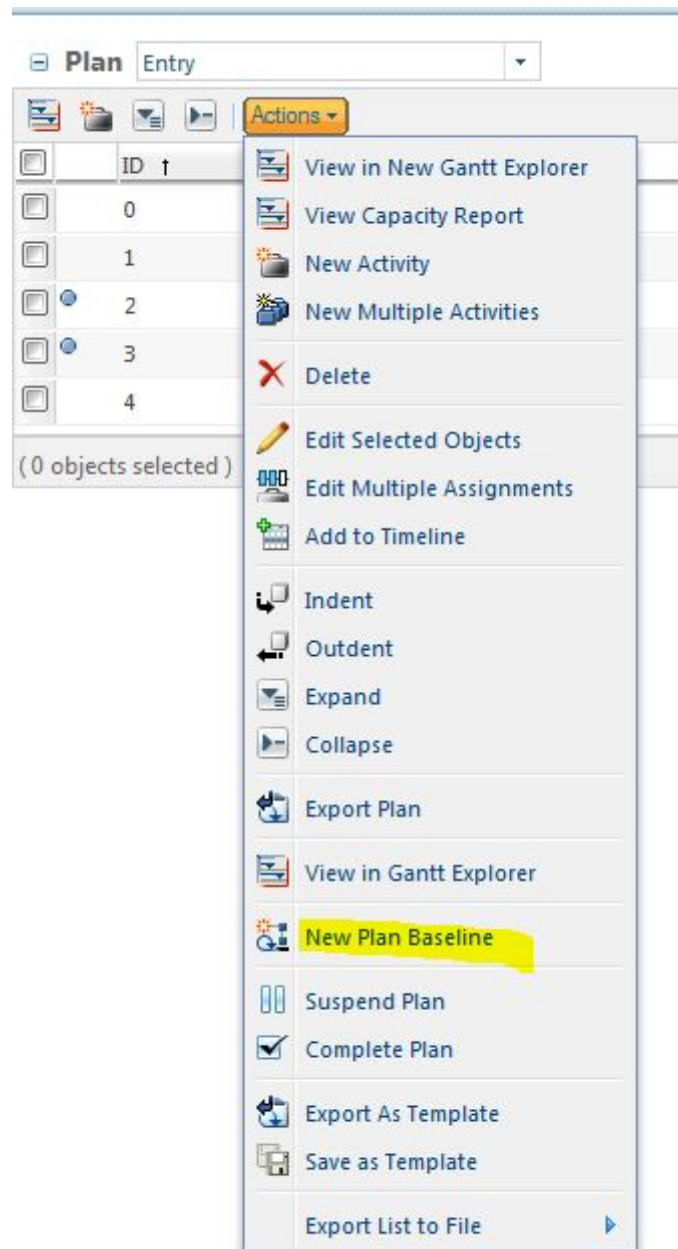


The screenshot shows the 'Plan Entry' window with a table of activities. The table has columns for ID, Name, Duration, and Estimated. Activity A2 is highlighted in orange.

ID	Name	Duration	Estimated
0	AutoBaseline	9 days	4/07/15 00
1	Project Start	0 days	4/07/15 00
2	A1	6 days	4/07/15 00
3	A2	3 days	4/15/15 00
4	Project Finish	0 days	4/07/15 00

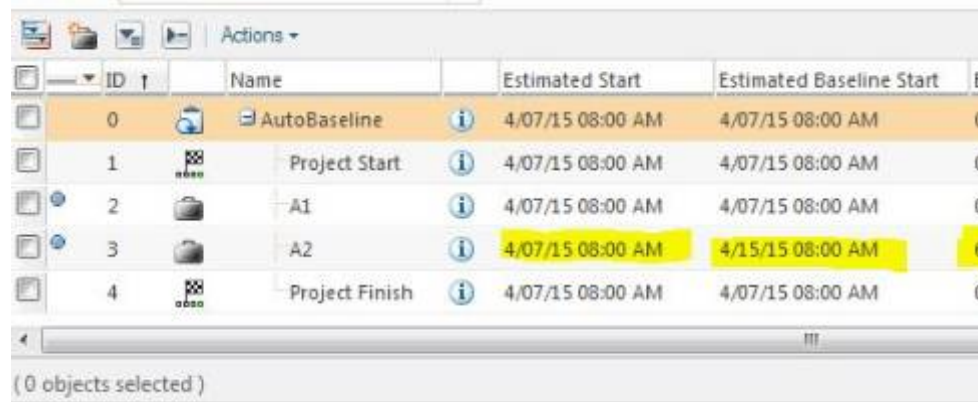
(0 objects selected)

2. Create a plan baseline to capture all activity information in its current form.



3. I complete "A1." I complete it 6 days earlier than the estimated date. As a result, A2's estimated start date is now also 6 days earlier than expected.

4. Now, I use the baseline columns to see the effects of completing the activity 6 days earlier than scheduled:



ID	Name	Estimated Start	Estimated Baseline Start
0	AutoBaseline	4/07/15 08:00 AM	4/07/15 08:00 AM
1	Project Start	4/07/15 08:00 AM	4/07/15 08:00 AM
2	A1	4/07/15 08:00 AM	4/07/15 08:00 AM
3	A2	4/07/15 08:00 AM	4/15/15 08:00 AM
4	Project Finish	4/07/15 08:00 AM	4/07/15 08:00 AM

(0 objects selected)

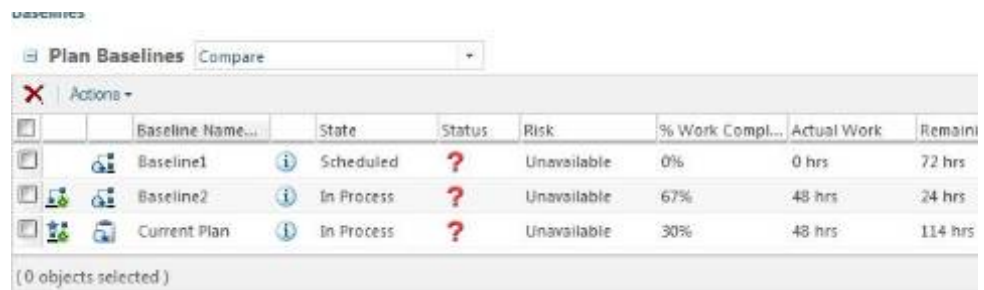
Everything is baselined, so there is a column that would show whatever change (variance) you're most interested in.

The most recent baseline is used by default, but you can manually select an earlier baseline to use.

For example, if you create a baseline every week and you want to see how the estimated work at 5 weeks ago is different than the actual work recorded, you can select the baseline from 5 weeks ago and see all variances.

If viewing the Plan table is too overwhelming for you, you can view individual baselines for each activity, deliverable, resource, resource assignment, or the overall plan

(Baseline showing overall plan attributes)



Baseline Name...	State	Status	Risk	% Work Compl...	Actual Work	Remaini
Baseline1	Scheduled	?	Unavailable	0%	0 hrs	72 hrs
Baseline2	In Process	?	Unavailable	67%	48 hrs	24 hrs
Current Plan	In Process	?	Unavailable	30%	48 hrs	114 hrs

(0 objects selected)

You can also view comparison reports between baselines:

(This comparison report shows the changes in activity A2 between Baseline1 and Baseline3)

Attributes

Baseline1 ⓘ		Baseline3 ⓘ	
Actual Start	--	Actual Start	201
Status	Unavailable	Status	Gre
Created On	2015-04-07 02:46:44	Created On	201
Actual Work	0 hrs	Actual Work	5 hr
State	Scheduled	State	In F
Risk	Unavailable	Risk	Me
% Work Complete	0%	% Work Complete	21%
Duration	3 days	Duration	2 d
Critical	Yes	Critical	No
Estimated Finish	2015-04-17 17:00:00	Estimated Finish	201
Remaining Work	24 hrs	Remaining Work	19 h
Estimated Start	2015-04-15 08:00:00	Estimated Start	201

I think this would fulfill all customer requirements above except for the "highlighting" part. As a workaround, the Plan table includes options to export information to file (CSV, HTML, XLSX, etc.) You might be able to work out some sort of macro that would automatically highlight whatever is most important to you.

More information is available from the Windchill Help Center "Plan Baselines" topic (available in the 10.2 M030 Help Center):

Data Management Capabilities > Managing Projects > Projects and Programs > [Plan Baselines](#)



Actions

Like (3)



Kristopher Pizzarelli Apr 16, 2015 11:42 AM (in response to Caitlin Wheelless)

Caitlin Thank you for that Information. You could have just said "the baseline function does that in M030" but your VERY informative comment was GREAT!

Thank you... I am going to experiment with that.

Actions

Liked (1)



Alex Saji Apr 16, 2015 12:31 PM (in response to Caitlin Wheelless)

Thanks for the well written reply , thats very helpful.

Regards
Alex

Actions

Liked (1)



Petr Helesic Jan 5, 2017 2:52 AM (in response to Caitlin Wheelless)

I would like to applause that this is first explanation of the plan
baselines usage I've seen. Thank you for that so much.

Best Regards

PetrH

Actions

Liked (1)