**SOP: Project Schedule Preparation**

**Configuration Management**

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**Purpose**

How to prepare a project schedule for a project?

**Audience**

* PMO head
* PMs

**Guidelines**

1. Tag is related to type of work. If a project has multiple tag then PM should create a subproject for each tag. Subprojects are not created based the volume of work in a tag.
2. A project which has multiple tag must have one separate child project for Design, PPC, Finance, Purchase activities. This we will call pre-fab project plan of the project. Name of this project should have a suffix “-0”, for example if project is 4170 then pre-fab project plan name shall be “4170-0”
3. Any fabrication schedule, whether child schedule or single schedule must start with material receipt (MR). There must be dependencies between fabrication activities and MR.
4. Due to several child projects if it is not feasible to set dependencies between PO and MR activities then PM must track them manual and update the child plan accordingly.
5. A plan cannot be published on PWA with local resources therefore PM need to ensure all the local resources are replaced with equivalent/similar enterprise resource.
6. Use only Enterprise Calendars. Calendar name starting with “TEAM” are enterprise calendar.
7. No local resources to be used. Only enterprise recourse to be used.
8. Fill project information correctly using the work order information.
9. Customer name to be selected from the available dropdown menu. If it is not available in the list then “\*Not listed\*” can be selected temporarily. In this case inform the PMO head so that he can create provision new customer name in the system. Once the new customer name is in the system. Close project, open project and enter this customer name in project information box.
10. ‘Project information’ tab is to be updated correctly as many dashboards/reports reads this for report preparation.
11. Five ways of changing start and finish date without entering date in these fields.
12. Change dependency
13. Change lag or lead information
14. Change resource required
15. Change duration
16. Change work
17. Ten Views to enter important project information
18. TEAM-BudgetInfo-View
19. TEAM-Despatch-View
20. TEAM-Finance-View
21. TEAM-GenInfo-View
22. TEAM-ProposedSchedule-Analysis-View
23. TEAM-Purchase-Dept-View
24. TEAM-Resource-View
25. TEAM-Work-Tracking-View
26. TEAM-Work-Tracking-View-2
27. TEAM-Temp
28. Use project TEAM\_Schedule-Review-Checklist to ensure project schedule has all the information and all is correct.
29. ‘Duration’ in MSP denotes the time taken for that particular activity.
30. ‘Work’ in MSP denotes the amount of effort required to complete that particular activity.
31. Before any department start working on the project, a schedule related to that department’s work should be prepared and baselined
32. Follow the level of planning concept. It means we will do the detail planning as and when more information will be available. Secondly do not do the hour level of micro planning for each activity in the early phases of project. But it does not mean you should not high level plan or project work start without baseline.
33. Project schedule can be baselined only by PMO Head
34. PMO Head need to make a note on which date project was baselined
35. PM shall not temper any baseline information

**Inputs**

1. Project file transferred from Sales dept. in CRM.
2. Higher level of commitment received from respective stakeholders in CRM.
3. CDD and milestone date agreed with customer.
4. Resource capacity plan and availability plan. Currently we are considering Production Work resources but we can extend this to machinery in future.

**Steps**

1. Launch Project
2. If project plan for similar project exists in the system
   1. Open old similar projects. Save as file as new project name.
   2. Enter all Project Information
   3. Remove all unnecessary information.
3. If create plan from scratch then
   1. Write project phases
   2. Write deliverables, major activities or milestones under each phase
   3. Write activities for each deliverables
   4. Sequence above activities (enter predecessor)
   5. Estimate resources type and minimum quantity required to do the work
   6. Estimate duration, using the benchmark
   7. Estimate work
4. Above set of 7 activities shall be done by each department separately for their department related work. PM should facilitate this work.
5. If PM prepared the plan based on past data or sample then ensure it is reviewed by respective departments.
6. Departments should review the work in terms of
   1. Has all the activities related to their department on the project are listed
   2. Are they estimated correctly in terms of duration?
   3. Are they sequenced properly?
   4. Are they estimated correctly in terms of resource and effort?
7. Enter the proper precedence like SS, SF, FF, FS with a suitable lag and lead. Lead to be entered with ‘-‘ sign and lag should be entered with ‘+’ sign.
8. While developing schedule, milestone can be marked and ‘Milestone activity’ can be given like Production, Despatch etc.,
9. After developing schedule, take a look at the overall start date, end date, man hours etc., and do necessary changes (if required) to achieve the required delivery date.
10. Once the schedule is completed, the same needs to be saved & published.
11. After that schedule need to be reviewed by PMO head in terms of resource loading
12. After that PMO Head shall baseline the schedule & republish

**Exit Criteria**

* Project schedule do not have any major discrepancy against the checklist TEAM\_Schedule-Review-Checklist
* Ensuring no duplication of activities or blank activity
* Ensuring no spelling mistakes.

**Validation**

1. Cross-verifying the project details in Project centre home page.
2. Cross verifying the capacity mapping and other relevant tabs to ensure the impact post publishing the schedule.