CHAPTER

12

Saving the Project Plan

Once you obtain the stakeholders' approval, it's time to save an official, approved version of your project plan. This approved plan wears a lot of hats during the life of your project. It's documentation of the agreed-upon scope, schedule, budget, and so on; when questions arise later, you can turn to the approved plan to help sort them out. The project plan also acts as a reference for the project team as they do their work. Finally, the project plan contains the targets you've set for the project. As the team performs the project work, you compare actual performance to the plan to see whether you're on the right track. But first you have a few final planning tasks to complete. A plan is merely a *proposed* plan until the stakeholders accept it and commit their approval in writing.

A project plan covers a lot of ground, and it isn't stored in a single file. Saving a project plan means saving an approved copy of *every* file that contributes to the plan. This chapter talks about setting up a storage system not only for the planning documents, but also for files generated during the rest of the project's life. You'll learn about different ways to store project files and how to structure project information so it's easy to find and manage.

For some types of files, saving a copy is as simple as appending *v1.0* to the end of the filename, but Project files require more attention. This chapter describes how to set a baseline in your Project schedule so you can compare your planned schedule and cost to what you actually achieve. You'll learn how to set baselines at several points during a project to watch for trends over time. Finally, you'll find out how to view baselines in Project, either alone or in comparison to actual performance.

Obtaining Approval for the Plan

With the convenience of email distribution lists and shared file storage, you may be tempted to email project stakeholders and ask them to review the plan and email their approvals back to you—without holding a sign-off meeting to make sure everyone understands what they're approving. Unfortunately, the attached plan is likely to sit unread in all those email inboxes. You may receive approvals, but they may get unapologetically revoked later when people realize that the plan doesn't meet their needs.

To obtain approvals that really stick, set up a sign-off meeting to review the plan and snag approvals then and there. (The box on page 370 talks about how to handle another approval issue—starting project execution before the plan is approved.) Here are some tips for a successful sign-off:

1. **Distribute the project plan in advance, and urge the stakeholders to read it before the meeting.**

   You can hand out hard copies, send the plan as an email attachment, or place a copy of the plan online where everyone can access it. The sign-off meeting (described in the next step) provides some motivation for the stakeholders to read the plan beforehand.

2. **At the sign-off meeting, don't assume that the stakeholders have read the plan.**

   Your job as project manager is to present the plan at the meeting, covering its key aspects and pointing out potential conflicts, problems, and risks. Encourage questions and discussion—this is your last chance to hash out issues. To jump-start the discussion, ask stakeholders pointed questions about the areas you see as potential problems.

3. **A nod or a verbal "yes" doesn't constitute approval; circulate the sign-off page and ask everyone to actually sign it.**

REALITY CHECK

Starting Before the Plan Is Approved

Hard deadlines are a fact of life, so some projects start before the project plan is approved—or before the plan is even complete. Beginning work without an approved plan is *absurdly* risky. The team could work hard for weeks, only to have to backtrack and redo it all when the final plan is approved.

If you can, take a stand and persuade stakeholders and management to delay the execution phase until after the plan is approved.

If your persuasive powers don't work, save the plan as it is and begin to execute the project with what you have. At the same time, continue to push—hard—for plan approval. When you get it, save the approved version of the plan and compare performance with the approved version going forward. And don't forget to document any backtracking you have to do, so you can argue against false starts in the future.

Storing Project Documents

Even small projects generate an astounding amount of information. Initially, the project plan is a collection of requirements and specification documents, budget spreadsheets, the schedule in Project, and so on. Don't forget the draft documents you generated before you obtained approval, and the emails and memos that flew around as planning progressed. When project execution starts, the amount of information expands exponentially because of project results like design documents, contracts for services, software that's been written, databases, and blueprints. Meanwhile, managing the project produces status reports, change request forms, and so on.

In the good old days, the container for project documentation was called a *project notebook* because it was a three-ring binder (or several) that held paper copies of every project-related document. These days, a project notebook tends to be electronic, with files stored somewhere on a computer. Either way, you need a filing system so everyone can find and access the information they need.

The best project filing system depends on the project: what sort of information it produces, who needs access to that info, any security issues, and the standards your organization follows. The choice boils down to structure and technology. You need a way to track various versions of documents and deliverables—for a construction project, for instance, that includes things like equipment specifications, contracts, architectural design drawings, engineering drawings, construction plans, and as-built drawings. In addition, you may need a system to manage document access and changes. For example, all team members can read the project requirements to see what their tasks are supposed to deliver, but only a few authorized team members can *modify* those requirements.

Regardless of the storage technology you use, you need to structure the information so that finding it isn't an Easter egg hunt. Project information typically falls into a few high-level categories that you can use to build the basic storage structure (as illustrated in Figure 12-1):

- **Project deliverables.** As you learned in Chapter 2, deliverables are the tangible results that a project produces. Because payment often hinges on these deliverables becoming reality, you want them to be easy to find and control. Having separate subfolders within this category for draft and final versions make it even easier to see whether a deliverable is complete.

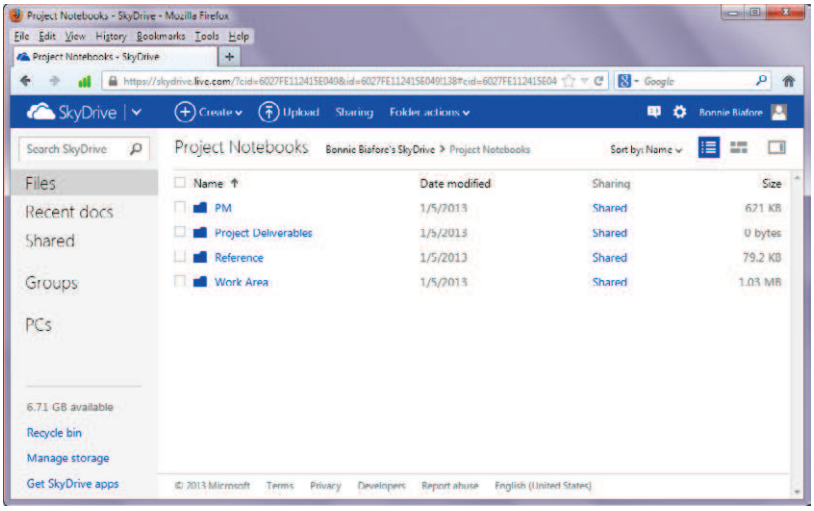

FIGURE 12-1

You can design an information hierarchy with different storage tools. For example, you can build a folder structure on a file server, within a Microsoft SharePoint Server, or on a storage area in the cloud (as shown here, using SkyDrive as an example), as the box on page 373 explains.

- **Project-management deliverables.** Managing a project produces all kinds of intermediate deliverables, like the project plan, status reports, and change request logs. Separate folders for different types of info can forestall information overload. However, the best way to break down this information depends on what makes the most sense to you. For example, you might organize it by project-management phase with folders for planning, execution, control, and closure. Or you may prefer to organize it by project-management activities: planning, communication, finance, risk management, change control, and so on.
- **Reference.** Projects almost always include background information that, although not a deliverable, can be essential. For example, you may need to refer to the charity's promotional materials, but those materials aren't part of your fundraising project.
- **Project work.** All the work products that team members produce have to go somewhere, but (happily) where to store them may not be your problem. For example, software-development projects often store and manage code in source-control systems. In other cases, teams may set up their own work areas and organize their files as they see fit, delivering their work to you when it's complete.

TOOLS OF THE TRADE

Document Management Options

How you store project documents depends on the technology available to you. If your organization has a document-management system like Documentum, then you can store and manage versions of project documents in high style. Similarly, Microsoft Enterprise Project Management Solutions use SharePoint to provide document libraries and places for tracking issues and risks.

If you don't have these types of power tools, don't despair. Your far-flung project teams can share documents in plenty of other ways:

- **Microsoft SkyDrive.** This cloud storage service is part of Microsoft's Windows Live. People can upload, access, and sync files between a SkyDrive location and their computers and other devices, or through a web browser.
- **Other cloud storage services.** If you use a cloud storage service that's registered with Office 2013, the service appears in the Open and Save As screens of Backstage view (page 93).
- **SharePoint Server.** You don't need Project Server to set up a SharePoint server for sharing documents. For example, if you use Office 365 for midsize businesses, you can store files in an Office 365 SharePoint location. A SharePoint website can carry out workflow processes, such as checking documents in and out, storing multiple versions of a document, or requiring approvals before documents proceed to the next step. You can also set SharePoint permissions to control who can read or write to different areas. Moreover, Project Professional lets you export project files to a SharePoint list (you need SharePoint 2010 Foundation or later), so you can share project information with anyone who's interested.
- **Basecamp.** One of many web-based collaboration packages, Basecamp (*www.basecamphq.com*) provides online folders for storing and sharing documents.
- **Directory structure.** Forgoing fancier tools, you can simply set up folders on a shared network disk drive and use file-naming conventions to track versions of documents. For example, track document versions by appending the date saved to filenames. When a file reaches a milestone, such as Approved, you can add that to the filename as well.

Preserving the Original Plan in Project

After stakeholders approve a project plan, they want the project to follow that plan. If it *doesn't*, the stakeholders expect an explanation of the difference between planned and actual performance (called *variance*). Variance is the foundation of a variety of project performance measures (page 441), like earned value and the schedule performance index. To calculate variance, you first have to save the original planned values in your Project schedule.

As you've seen in previous chapters, Project constantly updates fields like dates, duration, work, and cost as you make changes (as long as tasks are set up as automatically scheduled, that is). For example, if you increase the work hours for a task, Project recalculates the task's duration and finish date. When you begin to track progress, Project continues these recalculations; for example, as a delayed predecessor task pushes back the start dates of its successors.

PRESERVING THE ORIGINAL PLAN IN PROJECT

Fortunately, Project has no problem keeping track of both your original plan and the current one. The program stores the original plan in a *baseline*, which is a snapshot of schedule and cost information (you create this snapshot by *setting the baseline*, as explained in the next section). In fact, you can store up to 11 baselines; for example, you can save a baseline after adding a major change request or save several snapshots to evaluate performance trends. At the same time, the schedule you see every time you open Project is the *current* plan, which shows the schedule and cost based on any revisions you've made, as well as the effects of actual performance. As you'll learn in Chapter 14, Project uses baseline values and current values to calculate variances and other performance measures.

A baseline doesn't save *all* the info that resides in a Project file. From hundreds of Project fields, a baseline saves key schedule and cost values for each task, resource, and assignment in the Project file. The following fields show the information stored in Project's primary baseline, appropriately named *Baseline*, but the fields in other baselines (which are named Baseline1 through Baseline10) work the same way:

- **Baseline Start.** Shows the values that were in Start fields for tasks and assignments when you set the baseline. For automatically scheduled tasks, Project calculates these dates; for manually scheduled tasks, it uses the dates you specify.
- **Baseline Estimated Start.** In most cases, when you set a baseline, this field gets filled in with the Scheduled Start date that Project calculates. For automatically scheduled tasks, Baseline Start and Baseline Estimated Start are *always* identical. If you fill in a manually scheduled task's Start field with a date, Project copies that date to Baseline Estimated Start when you set a baseline. However, if you leave a manually scheduled task's Start field blank or type a note in that field, Project copies the Scheduled Start value (the start date that Project recommends for the task) to the Baseline Estimated Start field when you set a baseline.

NOTE With manually scheduled tasks, Scheduled Start and Scheduled Finish fields may not contain values (page 63). The Baseline Estimated Start and Baseline Estimated Finish fields are specifically for manually scheduled tasks *without* specified date values. Project sets these fields to the dates that most closely match where the tasks occur in the project plan. For example, a top-level manually scheduled task without dates or duration has a Baseline Estimated Start date that's the same as the project start date. A manually scheduled subtask without dates has a Baseline Estimated Start date equal to its summary task's start date.

- **Baseline Finish.** Shows the values that were in Finish fields for tasks and assignments when you set the baseline. For automatically scheduled tasks, Baseline Finish represents the dates Project calculates; for manually scheduled tasks, it represents the dates you specify.
- **Baseline Estimated Finish.** When you set a baseline, this field usually copies its values from the Scheduled Finish dates Project calculates. If you type a date in a manually scheduled task's Finish field, Project copies that date to this Baseline Estimated Finish field when you set a baseline. And if you leave a manually scheduled task's Finish field blank or type a note in that field, Project sets the Baseline Estimated Finish field to one day after the task's start date.

- **Baseline Duration.** Represents the planned duration of tasks based on the Baseline Start and Baseline Finish dates.
- **Baseline Estimated Duration.** Shows the duration based on the Baseline Estimated Start and Baseline Estimated Finish dates.
- **Baseline Work.** Contains the planned person-hours for tasks, resources, and assignments. For example, Gantt Chart view's Baseline Work field shows the total planned work for each task when the baseline was set. However, Resource Sheet view's Baseline Work field indicates the hours that were assigned to each resource when you set the baseline. In addition, the Baseline Work field in a time-phased view like Task Usage shows work for each time period.
- **Baseline Cost.** Represents the planned cost of tasks, resources, and assignments when the baseline was set. This field stores time-phased cost, so views like Task Usage and Resource Usage show baseline costs for each time period.
- **Baseline Budget Work.** Saves the budgeted person-hours (page 278) for work resources and budgeted units for material resources. You can compare this field with the Budget Work field to see how actual (or scheduled) budgeted work compares with the baseline budget.
- **Baseline Budget Cost.** Shows the planned budget for project cost resources (page 280).

NOTE If you use the Fixed Cost field to track costs like fixed-price contracts (page 268), the Baseline Fixed Cost field holds your baseline fixed-cost value. The Baseline Fixed Cost Accrual field documents the accrual method you set for your fixed cost. If you're wondering about the Baseline Deliverable Start and Baseline Deliverable Finish fields, these correspond to the planned start and finish dates for the Deliverable feature in Project Server, which lets you publish project deliverables on which other projects may depend.

Setting a Baseline

Project doesn't set baselines automatically, because it has no way of knowing when your plan is ready to be saved for posterity. When stakeholders approve the project plan, one of your very next steps is to set a baseline in Project to save the targets you've committed to. To set the first baseline in Project, do the following:

1. **Open the file you want to set a baseline for, head to the Project tab's Schedule section, and choose Set Baseline→Set Baseline.**

   The Set Baseline dialog box (Figure 12-2) opens.

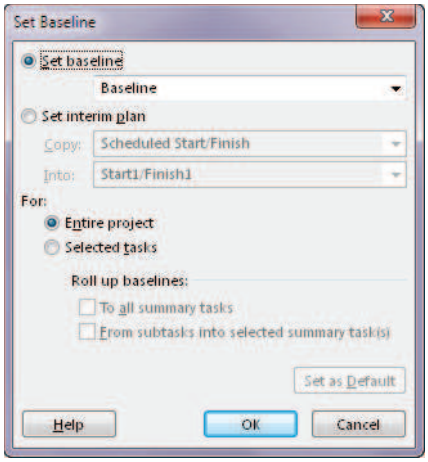

FIGURE 12-2

The options that Project selects automatically are exactly what you want for the first baseline you set. In fact, you can set up to 11 different baselines, which is a handy way to track trends in performance over time. The information for the other 10 baselines resides in fields whose names begin with Baseline1, Baseline2, and so on.

2. **If this is the first baseline for your project, make sure the "Set baseline" box is set to Baseline and that the "Entire project" option is selected.**

   Whether you plan to set only one baseline or are setting the first of several, save your plan to Baseline this time around. When you first set a baseline, you want to save the values for the entire project. Later on, you may want to save values for selected tasks, like when you add tasks to a project.

3. **Click OK.**

   Project stores the current values for start, finish, duration, work, and costs in the corresponding Baseline fields. The next time you open the Set Baseline dialog box, the "Set baseline" box shows the date you set the baseline.

4. **To save a second copy of the baseline you just created, repeat steps 1–3. In step 2, choose a different baseline in the "Set baseline" box.**

   The box on page 378 explains why it's a good idea to save two copies of your most recent baseline.

EDITING A SET BASELINE

Suppose a stakeholder makes a stink about the project plan *after* you've set the baseline. If the other stakeholders acquiesce, you can modify the project plan to address the issues. Once you've made the necessary changes, you'll want to save the edited plan so the baseline reflects your changes.

If a baseline already has values, you usually don't want to overwrite them because you'll lose track of any variances between the original baseline and the actual performance. Here's how to reset just the changed tasks in a baseline that already contains values:

1. **In the Set Baseline dialog box (Project→Set Baseline→Set Baseline), select the name of the baseline you want to reset.**

   If you've saved only one baseline, it appears automatically in the "Set baseline" box.

2. **Select the "Selected tasks" option if the changes affect only a portion of the project.**

   If the changes affect the entire project and you want to replace the baseline completely, select the "Entire project" option instead.

3. **Click OK.**

   A message box warns that you're about to overwrite a saved baseline. Click Yes, and Project overwrites the current baseline values with the new ones and changes the "last saved date" value.

Setting Additional Baselines

Schedule and cost performance can fluctuate when projects continue for months or years. For example, after 3 months, a project is 10 percent behind schedule; at the 6-month mark, it's 20 percent behind schedule; then, at 1 year, your recovery strategy pays off and the project is only 2 percent behind schedule. By setting additional baselines at key points in a project (at the end of each phase or at regular intervals), you can evaluate trends over time.

An additional baseline is also helpful when a project experiences a big change—an interruption to the schedule, a big scope increase, or a spike in the price of materials. Suppose your project is 20 percent complete when a different, high-priority project intervenes. When you resume your project, the original baseline start and finish dates are too old to produce meaningful variances, and costs may have changed significantly. When you recommence work on your project, you need a new baseline that reflects the updated targets. If you don't want to lose the original baseline values, you can save the original to one of the additional 10 that Project provides and save your new baseline to Project's primary baseline fields.

To set another baseline for a project, follow these steps:

1. **In the Project tab's Schedule section, choose Set Baseline→Set Baseline.**

   The Set Baseline dialog box opens with the "Set baseline" box set to Baseline, and the "Entire project" option selected.

2. **In the "Set baseline" box, choose the baseline you want to set, such as Baseline2.**

   Baselines that have already been set have "(last saved on mm/dd/yy)" appended to the end of their names, where mm/dd/yy represents the most recent date you saved the baseline.

3. **Make sure the "Entire project" option is selected.**

   When you save any of the 11 baselines for the first time, you want to save the values for the entire project. Later on, you may want to save values only for selected tasks—for instance, when you add tasks to a project, as described on page 378.

4. **Click OK.**

   Project stores the current values for start, finish, duration, work, and costs in the corresponding Baseline fields, such as Baseline1 Start, Baseline1 Finish, Baseline1 Duration, Baseline1 Work, and Baseline1 Cost. The next time you open the Set Baseline dialog box, the "Set baseline" drop-down list shows the last saved date for the baseline.

   If the selected baseline was saved before, Project warns you that the baseline has already been used and asks if you want to overwrite it. Click Yes to overwrite existing values (if, for example, you've used up the 11 baselines and want to reuse an older one). If you don't want to overwrite it, click No, and then select a different baseline back in the Set Baseline dialog box.

POWER USERS' CLINIC

Viewing Recent Variances

You can make your life easier by using Project's primary baseline (the one named Baseline) to store the most recent values, because that's the one Project uses to calculate variances. By saving your most recent values to the Project baseline named Baseline, it's easy to see the most recent cost and schedule variances. Project calculates Variance field values by subtracting a Baseline field from the current corresponding field value. For example, Cost Variance equals Cost minus Baseline Cost.

Here's how to reserve Baseline for the most recent values as you set additional baselines:

1. When you save your original plan values, set the baseline's name to Baseline.
2. Immediately save the original plan a second time, but this time as Baseline1. That way, your original baseline values are safely stored in Baseline1. And because the original plan is also stored in Baseline, Project variance fields show variances from the original plan.
3. When you set the next baseline, save it as Baseline, so variance fields show variances from the newest baseline.
4. Immediately save the project schedule *again* as Baseline2. This permanently records the second baseline.
5. For each additional baseline, save the project schedule once as Baseline and once as the next empty baseline.

Adding New Tasks to a Baseline

A baseline starts out representing your original plan, but after the plan has been approved, people sometimes ask for changes, which often leads to new tasks in the

schedule. For example, a client may make change requests and agree to the extra cost and time. The new finish dates and cost aren't variances from the original plan (because the client is agreeing to *amend* the original plan), so you want the baseline to absorb these additions.

If project execution hasn't started, you can simply reset the entire baseline (page 375). However, when your Project file already includes actual values, you don't want to overwrite baseline values for existing tasks. If you do, Project replaces the original baseline values with current ones, and any variances disappear. Instead, you want to *add* tasks to the baseline, setting the baseline values for only those new tasks and leaving baseline values for other tasks alone.

To add tasks to a baseline that's already set, follow these steps:

1. **In Gantt Chart view or another task-oriented view, select the tasks you want to add to the baseline.**

   You can select any kind of task, including low-level tasks, milestones, or summary tasks. If you want Project to roll up the values for the added tasks into specific summary tasks (see step 5), then be sure to select the summary tasks that you want the baseline to update.

2. **In the Project tab's Schedule section, choose Set Baseline→Set Baseline.**

   The Set Baseline dialog box opens with Baseline and the "Entire project" options selected.

3. **In the "Set baseline" drop-down list, choose the baseline to which you want to add tasks, and then choose the "Selected tasks" option.**

   The checkboxes underneath the "Roll up baselines" label become active, as shown in Figure 12-3. These checkboxes tell Project how you want the added baseline values rolled up into summary tasks.

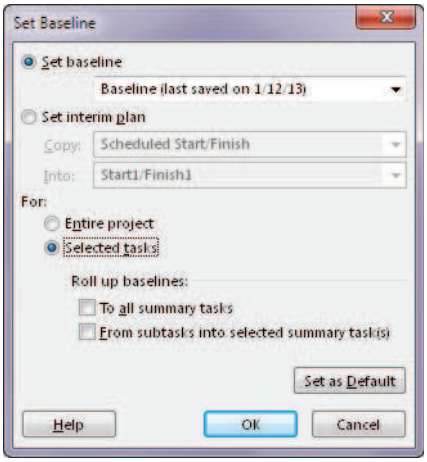

FIGURE 12-3

Project doesn't automatically update summary task baseline values when you add tasks to a baseline. It assumes that you want to keep original baseline values for summary tasks so you can see how the added tasks affect performance. In effect, the new tasks produce variances in existing summary tasks because they add to duration, work, and cost.

4. **To update all summary tasks with the new task values, turn on the "To all summary tasks" checkbox.**

   This checkbox tells Project to update the baseline values for all summary tasks up to the top level, as shown in Figure 12-4.

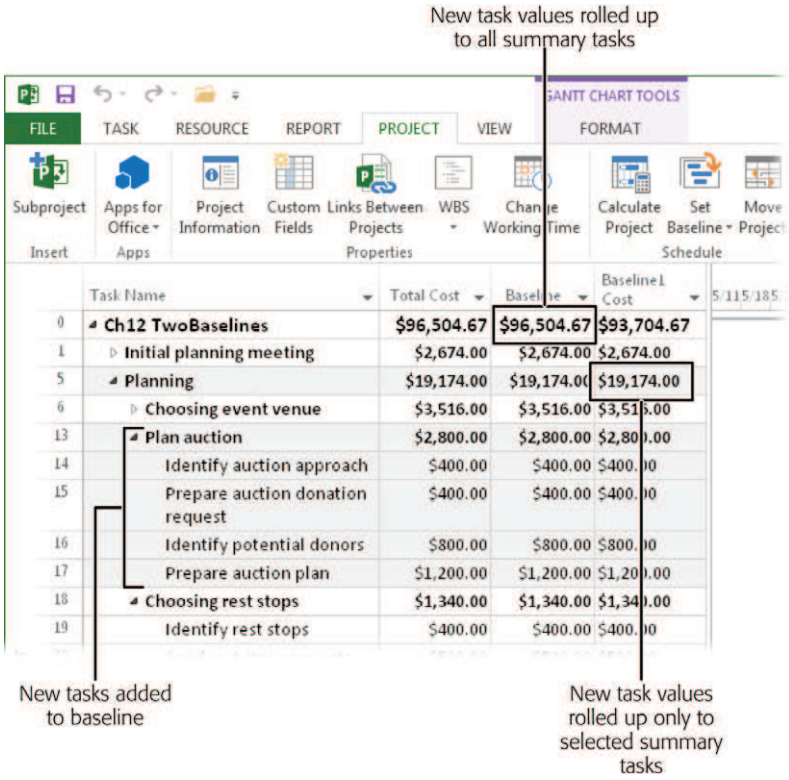

FIGURE 12-4

If the "From subtasks into selected summary tasks(s)" checkbox is turned on, the values from the new tasks added to the baseline roll up only to the summary tasks you select before you open the Set Baseline dialog box, like the Planning summary task shown here. (The project summary task for Baseline1 has not changed.) If the "To all summary tasks" checkbox is turned on, Project rolls up baseline values to all summary tasks, even if the "From subtasks into selected summary tasks(s)" checkbox is turned on.

5. **If you want the values for new tasks to update the summary tasks you select (in step 1), turn on the "From subtasks into selected summary task(s)" checkbox.**

   This checkbox tells Project to update the baseline values for the summary tasks you select before you open the Set Baseline dialog box with the values from the added tasks. By doing so, you update the baseline for the summary task to which the new tasks belong so you can see their effect. At the same time, you can keep higher-level summary tasks as they were so you can also see the impact of the new tasks on your original schedule and budget.

6. **Click OK.**

   Project updates the tasks you specified. If you want to change Project's standard baseline roll-up behavior to match the checkboxes you turned on, click "Set as Default" *before* you click OK.

Saving Sets of Start and Finish Dates

The second option in the Set Baseline dialog box is "Set interim plan." Unlike Project baselines, *interim plans* save only start and finish dates, not duration, cost, and work. If you don't need a full baseline, you can save an interim plan instead. The box on page 382 discusses various uses for interim plans.

To save start and finish dates in an interim plan, follow these steps:

1. **In the Project tab's Schedule section, choose Set Baseline→Set Baseline.**

   The Set Baseline dialog box opens.

2. **Select the "Set interim plan" option.**

   The Copy and Into boxes come to life, waiting for you to tell them the start and finish fields to copy from and to.

3. **In the Copy drop-down list, choose the set of start and finish dates you want to copy.**

   Project automatically selects Scheduled Start/Finish, which copies the current task start and finish dates that Project calculates and is usually what you want. However, if you want to copy dates from a baseline or another interim plan, choose the name of the baseline or interim plan instead. For example, suppose Baseline1 is an old baseline that you want to reuse for more recent information. You can save the baseline dates to an interim plan by choosing Baseline1 in the Copy box and then choosing an interim plan in the Into box.

4. **In the Into drop-down list, choose the fields into which you want to copy the start and finish dates.**

   Project selects Start1/Finish1 here, which means it will copy dates to the first interim plan. However, if you want to save another interim plan, choose Start2/Finish2 for the second interim plan, up to Start10/Finish10 for the 10th interim plan.

   The Into drop-down list also includes the names of baselines. You might wonder why you would copy interim plan dates into a baseline, particularly if the baseline already has values. It turns out that copying from an interim plan to a baseline is how you bring interim plans saved in earlier versions of Project into your Project 2013 baselines. For example, choose Start3/Finish3 in the Copy drop-down list and Baseline3 in the Into drop-down list, and Project copies the interim plan dates into that baseline.

5. **Select either the "Entire project" or "Selected tasks" option, and then click OK.**

   Saving values to interim plans works just like saving baselines. You can save the dates for the entire project or save dates for only some tasks, as described on page 379.

FREQUENTLY ASKED QUESTION

Baselines vs. Interim Plans

What should I use interim plans for?

With up to 11 baselines available, you may wonder why Project offers interim plans as well. Interim plans popped up in Project several versions ago, when the program offered only one baseline and project managers clamored for more.

Even now, interim plans have some uses. First, if you import a project schedule from Project 2002 and earlier, any additional baseline information resides in interim plan fields (Start1/Finish1 through Start10/Finish10). You can copy that information from interim plan Start and Finish fields (Start2/Finish2, for example) into baseline fields like Baseline2 (page 378).

In addition, if you save additional baselines regularly, 11 baselines may not be enough. As a workaround, you can save interim plans to act as partial baselines in between the full baselines you save. Although interim plans can't track cost and work changes, you can track schedule performance by watching how interim plan task dates change over time.

Clearing a Baseline

When you run out of empty baselines, you can overwrite a previously saved baseline (page 375) with current values. But suppose that you set a baseline by accident or that a set baseline is so obsolete you want to completely eliminate it. Clearing a baseline removes all its values. Here's what you do:

1. **In the Project tab's Schedule section, choose Set Baseline→Clear Baseline.**

   The Clear Baseline dialog box appears.

2. **In the Clear Baseline dialog box, make sure the "Clear baseline plan" option is selected.**

   If you want to clear an interim plan instead, select the "Clear interim plan" option, and then, in the "Clear interim plan" drop-down list, choose the plan's name.

3. **In the "Clear baseline plan" drop-down list, choose the baseline you want to clear.**

   The "Clear baseline plan" drop-down list automatically chooses Project's primary baseline (Baseline), so you must take care to select the baseline you want to clear.

4. **To clear the entire baseline, select the "Entire project" option.**

   "Entire project" is what you'll choose most often: You don't often clear values for only some tasks. But, for example, if you want to remove tasks from the baseline because the client has agreed to reduce the project's scope, then you have to select the tasks *before* opening the Clear Baseline dialog box and then choose the "Selected tasks" option.

5. **Click OK.**

   Project clears the baseline's values. However, Project doesn't update higher-level summary tasks to reflect the removal of the task baseline values.

Viewing Baselines

When you initially set a baseline, its values are exactly the same as the current Project-calculated field values. As the project team gets to work, the current values begin to stray from the baseline. Evaluating project performance (page 429) involves a lot of reviewing the variances between current and baseline values. You can see baseline values in several places.

For a 30,000-foot view of baseline and current data, head to the Project tab's Properties section and click Project Information. In the Project Information dialog box, click Statistics to open the Project Statistics dialog box, which shows top-level summary information for the whole project, as shown in Figure 12-5.

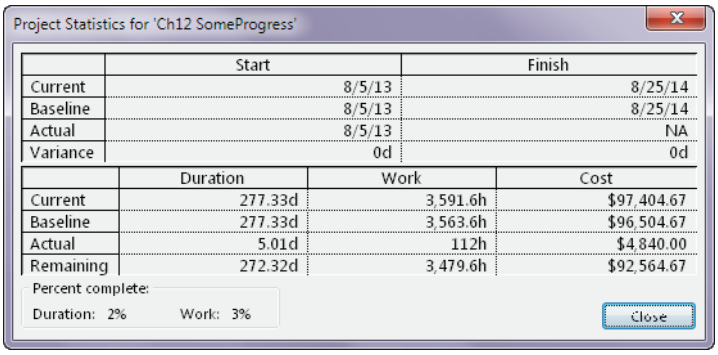

FIGURE 12-5

The Project Statistics dialog box contains current, baseline, and actual values as well as the variance for the project's start date, finish date, duration, total work, and total cost.

VIEWING BASELINE AND CURRENT VALUES IN A GANTT CHART VIEW

When you want to compare the baseline schedule with the current status, Tracking Gantt view is perfect. It shows gray task bars for the baseline start and finish dates immediately below task bars for the current schedule. To display Tracking Gantt view, shown in Figure 12-6, in the Task tab's View section, click the Gantt Chart down arrow, and then choose Tracking Gantt. (Or, in the View tab's Task Views section, click the Gantt Chart down arrow, and then choose Tracking Gantt.)

TIP From the ribbon, you can display any baseline you want in any Gantt Chart view. Display the Gantt Chart view you want and then click the Gantt Chart tools | Format tab. In the Bar Styles section, click the Baseline down arrow, and then choose the baseline you want to display.

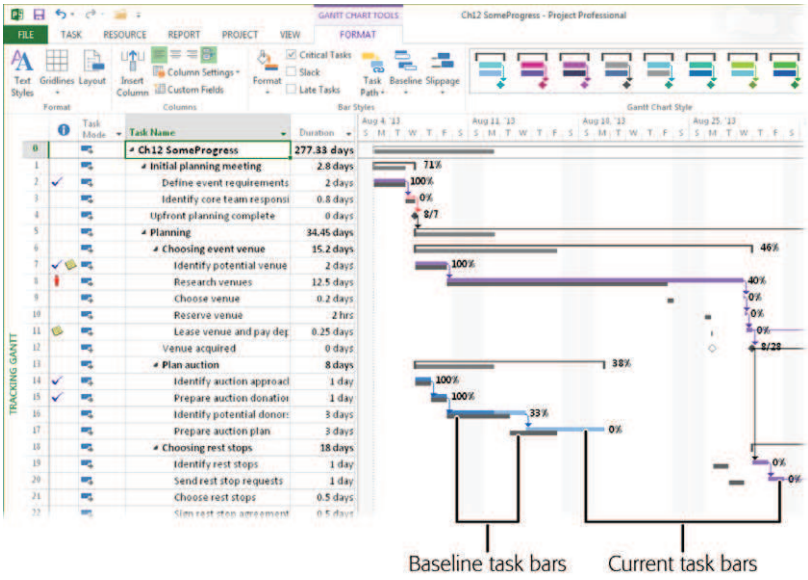

FIGURE 12-6
Tracking Gantt view displays task bars for the current schedule on top and baseline task bars below them. If you see only one set of task bars, you haven't saved a baseline yet.

If you save more than one baseline, you may want to see them in the same Gantt Chart so you can compare performance from one to the next. Multiple Baselines Gantt view displays different color task bars for Baseline, Baseline1, and Baseline2, as shown in Figure 12-7. To display this view, in the View tab's Task Views section, choose Other Views→More Views. In the More Views dialog box, double-click Multiple Baselines Gantt.

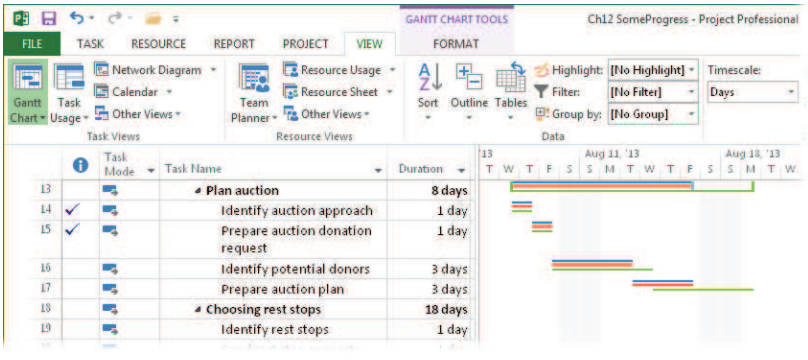

FIGURE 12-7
Multiple Baselines Gantt shows task bars for only Baseline, Baseline1, and Baseline2. It doesn't display task bars for the current schedule.

If you want to show more baselines or different baselines in Multiple Baselines Gantt, you can modify the view to include task bars for other baselines. For example, you may want to see task bars for Baseline1 through Baseline4.

To change the baselines that the task bars represent, do the following:

1. **Copy Multiple Baselines Gantt view and give it a name like FourBaselines.**

   Because swapping task bars requires several steps, it's a good idea to copy the view and then make the changes to the copy (page 598). Then you can copy the customized view to your global template and use it in other Project files. With Multiple Baselines Gantt view displayed, in the View tab's Task Views section, choose Other Views→More Views. In the More Views dialog box, click Copy, type a new name in the Name box, and then click OK. Back in the More Views dialog box, click Close.

2. **On the Gantt Chart Tools | Format tab, in the Bar Styles section, click Format→Bar Styles.**

   The Bar Styles dialog box opens.

3. **Click the cell that contains the first task bar style name you want to replace.**

   For example, click Baseline to edit the normal task bars for Baseline.

4. **Click the same cell a second time to make the name editable, and then type the new baseline number at the end of the name.**

   For example, to change Baseline to Baseline1, make the name editable, and then type *1* at the end. To change Baseline1 to Baseline4, drag over the 1 at the end of the name and then type *4*.

5. **In the From cell in the same row, choose the start date field for the new baseline.**

   For example, to switch the view to show Baseline4, choose Baseline4 Start. This tells Project to draw the beginning of the task bars based on the Baseline4 Start field values.

6. **In the To cell in the same row, choose the finish date field for the new baseline.**

   To complete the task bar style that shows Baseline4, choose Baseline4 Finish. These From and To settings tell Project to draw the task bars for Baseline4 from Baseline4 Start to Baseline4 Finish in the timescale.

7. **Repeat steps 3–6 to modify the Split, Milestone, and Summary task bars to use the same baseline.**

   Simply editing the task bar's name isn't enough. The fields you choose for the task bar's start and finish dates are what really matter.

8. **If you want to replace another baseline in the view, repeat steps 3–7.**

   Click OK when you're done.

To include an *additional* baseline in the view, you have to insert task bar rows for the baseline's normal, split, milestone, and summary tasks. Here are the steps for inserting the rows:

1. **Open Multiple Baselines Gantt view or a copy you've created.**

   Consider copying the Multiple Baselines Gantt view for your new multi-baseline Gantt Chart (step 1 on page 385 explains how). If you copy the customized view to your global template, you can use it in other Project files.

2. **On the Gantt Chart Tools | Format tab, in the Bar Styles section, click Format→Bar Styles.**

   The Bar Styles dialog box opens.

3. **Select the row for the task bar you want to duplicate, and then click Cut Row.**

   Project removes the row from the table.

4. **Before you do anything else, click Paste Row.**

   Project inserts the cut row back where it was originally.

5. **Select the row below where you want to insert the new row, and then click Paste Row again.**

   Project inserts another copy of the row immediately above the row you select.

6. **Edit the new row's Name, From, and To cells to match the baseline you want to show.**

   To display Baseline4, for example, change the name to include Baseline4, and then, in the From and To cells, choose Baseline4 Start and Baseline4 Finish, respectively.

7. **On the Bars tab in the lower half of the Bar Styles dialog box, choose the shape and color you want for the bar.**

   Baseline1, Baseline2, and Baseline3 already use red, blue, and green respectively, so choose a color like teal, orange, or purple. In the Shape box, choose a top, middle, or bottom narrow bar.

8. **If you're including more than three baselines in Multiple Baselines Gantt view, add a second task bar row to the view.**

   In Multiple Baselines Gantt view, Project uses narrow task bars so you can display up to three baselines on the same row of the Gantt Chart. But if you want to see more than three baselines, you have to tell Project to add another row to the view. To do that, in the Bar Styles dialog box, head to the new row you created in step 5 and, in that row's Row cell, type *2*, as illustrated in Figure 12-8. Doing this tells Project to place the baseline's task bar on a second row in the Gantt Chart.

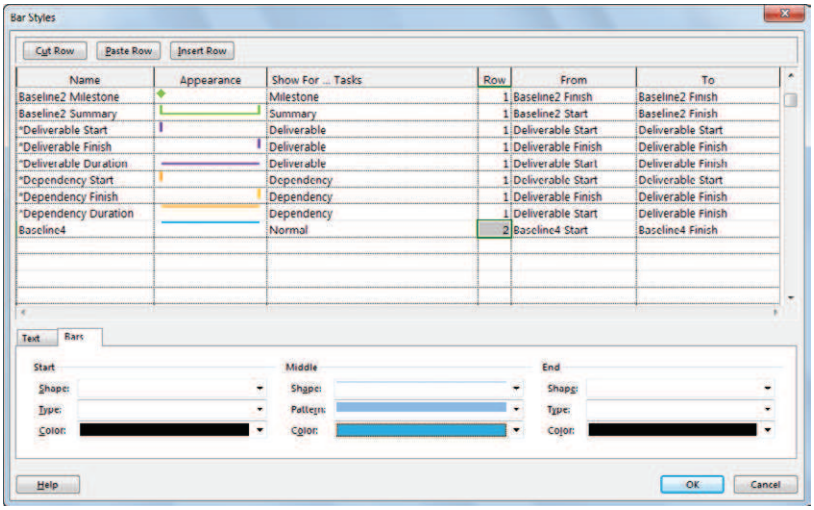

FIGURE 12-8
Multiple Baselines Gantt view includes task bar styles for Deliverable fields. Don't be misled: The Deliverable feature is available only when you use Project Server.

9. **Repeat steps 3–8 to create task bars for split, milestone, and summary tasks for the baseline.**

   If you choose the narrow task bars that run at the top, middle, and bottom of a row, you can add three more baselines to the second row of the view, just like Multiple Baselines Gantt view does in the first row.

VIEWING BASELINE VALUES IN A TABLE

Although Multiple Baselines Gantt view's timescale shows different task bars for each baseline, you probably want to see baseline costs, duration, and work. The table area of one of the Gantt Chart views is the perfect place to see these values.

Project includes the Baseline table, which displays columns for all the Baseline fields: Baseline Duration, Baseline Start, Baseline Finish, Baseline Work, and Baseline Cost. To display this table, in the View tab's Data section, click the Tables down arrow, and then choose More Tables on the shortcut menu. In the More Tables dialog box, select Baseline, and then click Apply.

TIP When you see values of "0" or "NA" in baseline fields, that's Project's way of telling you that you haven't saved that baseline yet.

If you would rather add baseline fields to another table, you can simply insert columns in the table. To add the Baseline Cost and Baseline Work fields to the Variance table, for example, right-click the table heading area where you want to insert the column. On the shortcut menu, choose Insert Column and then, from the drop-down menu, choose the baseline field you want to add.

NOTE Task Details view can show baseline start and finish dates. Although the form opens initially with the Current option selected, select the Baseline option to see the baseline start and finish dates.