

CWDS SM Procedure 101 – Producing the Schedule Update Report

Audience: Schedule Manager
Frequency: Monday of every Status Week
Created: 4/20/2016
Last Updated: 7/13/2017

After reading this procedure, you will be able to create the Schedule Update Reports for each service team. The Schedule Update Report is created as part of the bi-weekly schedule update cycle, which is described in the [Schedule Master Plan](#)

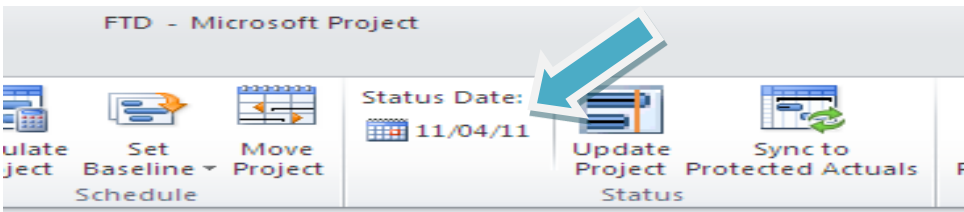
Prerequisites:

- MS Project Professional
- MS Project Online/PWA
- MS Excel
- MS SharePoint

Master Project Schedule - Use the current working [CWS-NS Master Schedule](#), which is found in the CWD MS Project Online. See [CWDS SM Procedure 107 – Team Schedule Maintenance](#) for accessing schedules maintained in the CWDS MS Project Online.

Views/tables/filters used: S_Bi-weekly Update Report *view*

Part 1: Generating Schedule Update Reports

Step	Description
1.	<p>Open the schedule, select the Project tab and set the Status Date to be the CWS-NS project status date which will be the Friday of the status week, then display all tasks using the Outline command, selecting “All Subtasks”</p> <p>Press F9 after changing the status date to force a recalculation.</p>  <p>The screenshot shows the Microsoft Project software interface. The title bar reads 'FTD - Microsoft Project'. The ribbon is set to the 'Project' tab. The 'Status Date' field is set to '11/04/11'. A blue arrow points to the 'Update Project Status' button. Other buttons visible include 'Update Project Schedule', 'Set Baseline', 'Move Project', and 'Sync to Protected Actuals'.</p>
2.	Select and apply the S_Bi-weekly Update Report <i>view</i>

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	<p>This view contains the following columns:</p> <ul style="list-style-type: none">• Id• Unique ID• S_Numeric Status (Number 1)• Task Name• Summary• S_Task Lead• Duration• % Complete• Start• Finish• Resource Names• S_Bi-weekly Status (Flag 7). <p>If columns do not match these then Insert or Hide columns as needed.</p>
3.	Right click on S_Bi-weekly Status (Flag 7) column header, choose “Custom Fields” and click on the “Formula” button

Field

Task Resource Type: Flag

Field

S_Bi-Weekly Status (Flag7)

Flag8

Comm Tasks (Flag9)

Flag10

Flag11

Flag12

Flag13

Flag14

Rename... Delete Import Field...

Custom attributes

None Lookup... Formula...

Calculation for task and group summary rows

None Rollup: OR Use formula

Calculation for assignment rows

None Roll down unless manually entered

Values to display

Data Graphical Indicators...

Help OK Cancel

Verify that the formula appears as follows:

Formula for 'S_Bi-Weekly Status'

Edit formula

S_Bi-Weekly Status =

[[If([Scheduled Start] <=[Status Date]+1 And [% Complete] <100, Yes, No)

+ - * / & MOD \ ^ () = <> < > AND OR NOT

Insert: Field Function
Import Formula...

Help
OK
Cancel

This formula filters tasks that are active from any time in the past to current status date that are less than 100% complete”. If the formula is correct, then click “OK”, then “OK” to close the dialog box.

4. Filter the S_Bi-weekly Status (Flag 7) to show only the value “Yes”.

This will yield a view that displays tasks through the selected status date that are not 100% complete

5. Filter the S_Team (Text 3) to show the tasks for a single team.

6. Locate the Excel Schedule Update Sheets template for the selected team at:
 ...CWS-NS\Project Management\Schedule\Schedule Update Sheets\01 Templates

CWS-NS Biweekly Status Updates														
County Consultant Team - Tomas Dolcini														
Week Ending 08/19/2016														
ID	UID	Plan Status	Task Name	Summary	Task Lead	Planned Duration	% complete	Planned Start	Planned Finish	Updated Start	Updated Finish	Updated % Complete	Resource Updates	Notes

7. Go back to MS Project and select all the information in the view under the selected Team The matches the columns in the Schedule Update Sheet.

Highlight all of the Tasks and Columns for the team and copy the highlighted data.
 Paste the highlighted data into the corresponding Excel sheet template.

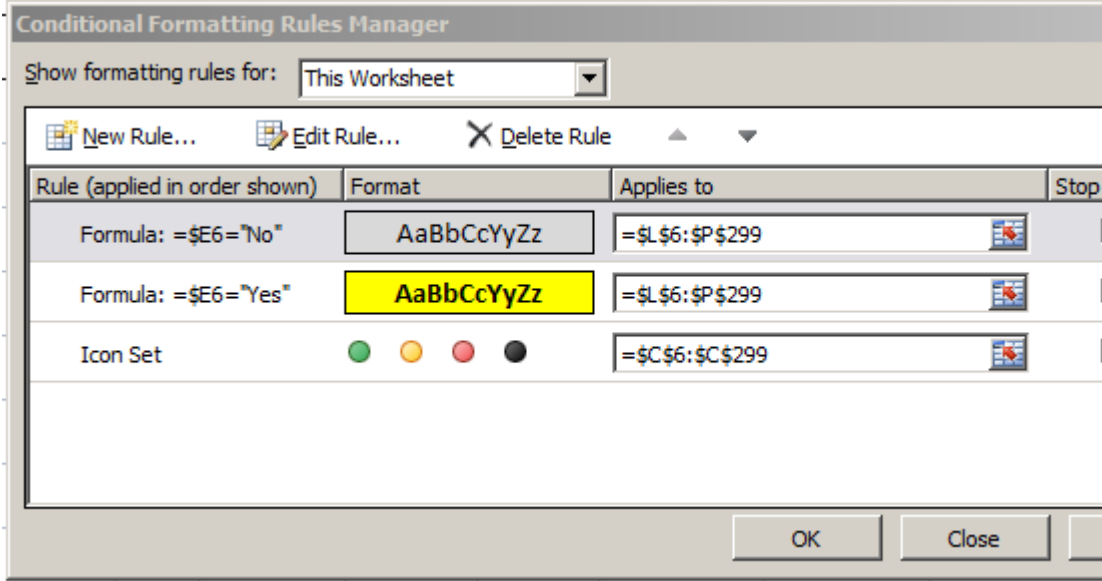
Unique ID	WBS	Task Name	Summary	S Task Owner	Duration	% Comp	Start	Finish	Resource Names
15	1	Project Start	No		0 days	100%	Fri 07/01/11	Fri 07/01/11	
16	2	DAT	Yes		998 days	25%	Fri 07/01/11	Thu 06/25/11	
17	2.1	External Dependencies	Yes		951 days	0%	Thu 09/08/11	Thu 06/25/11	
174	2.2	Critical Work	Yes		998 days	17%	Fri 07/01/11	Thu 06/25/11	
175	2.2.1	DAT MRD Deliverables	Yes		917 days	25%	Thu 08/11/11	Fri 04/10/15	
2767	2.2.1.1	MRD028: Database DSGN Description	Yes	Vedantu	546 days	0%	Tue 02/14/12	Thu 04/17/14	
468	2.2.1.1.1	MRD028: Database DSGN Description DRC	Yes	Vedantu	36 days	0%	Tue 02/14/12 8:00 AM	Wed 04/04/12 5:00 PM	

8. Delete the default column header that was pasted into the Excel sheet and leave the pre-existing header in place.

 Note: ensure all column information is readable by adjusting the Excel column widths as necessary.

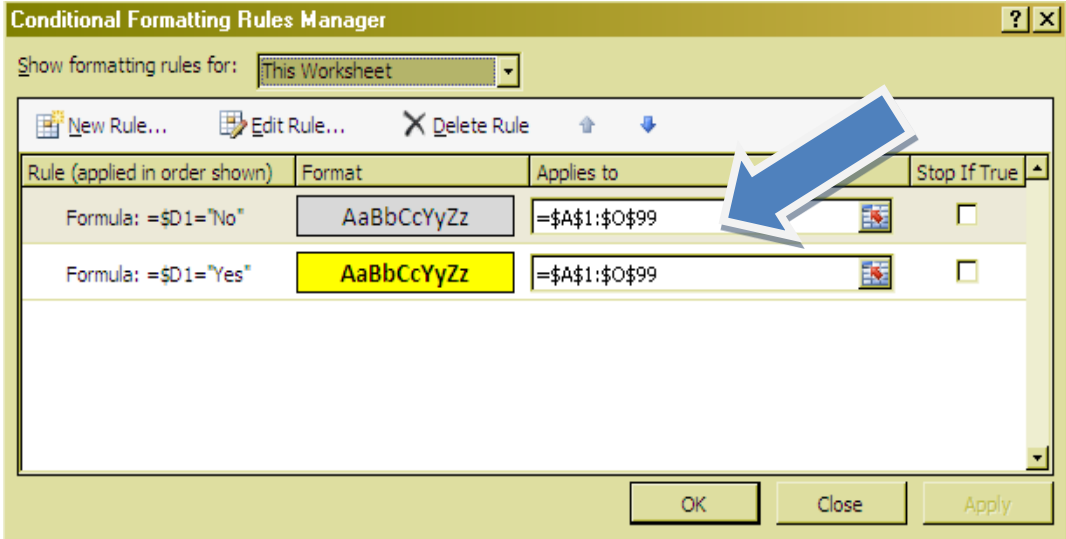
9. In the MS Excel sheet navigate to the Home Tab and then click on the **Conditional Formatting** button and select **“Manage Rules...”**.

 From the drop down menu select **“This Worksheet”**

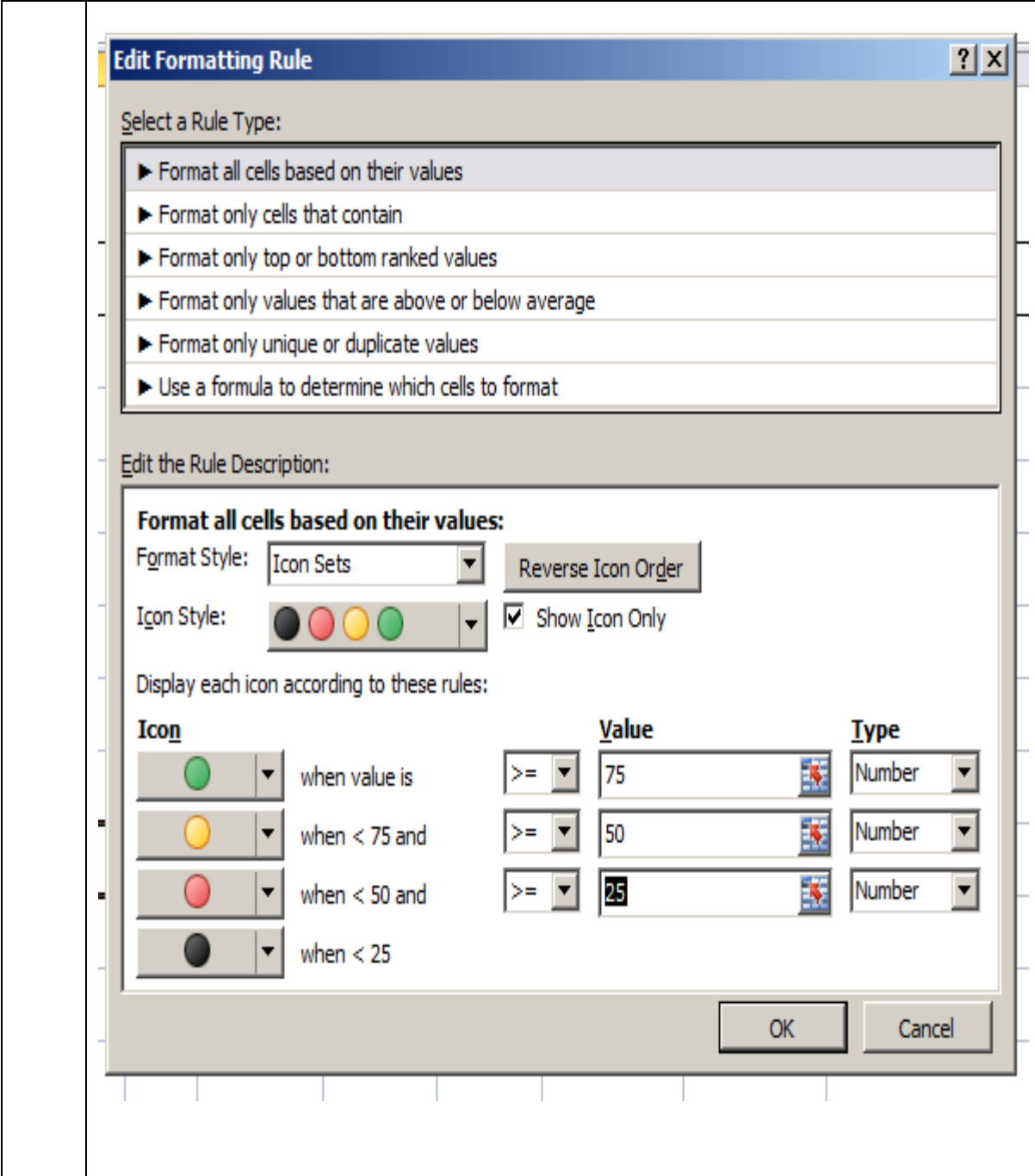


Change the “Applies to” string from its current value to “=\$A\$1:\$O\$99”. The O\$99 value indicates the final row to apply conditional formatting. If more than 99 rows appear in the spreadsheet, this number will need to be increased accordingly

A final view of the same screen with the desired values is shown below:






10. If necessary, edit the rules for the Icon Set to look like this:



11. Update the Week ending date with the new Status Date

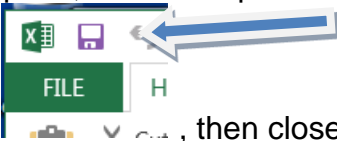

	G	H	I	J	
CWS-NS Biweekly Status Updates Contract Team - Karen Fruchtenicht Week ending 07/11/2014					
	Planned Duration	% complete	Planned Start	Planned Finish	Resources



<p>12.</p>	<p>Verify the following:</p> <ul style="list-style-type: none"> • The Update % Complete column cell value is set to xx% (not xx.00 %, etc) • Verify the update area of the spreadsheet is set to red text • Verify the Print area is set correctly • Set column height (30 recommended)
<p>13.</p>	<p>Copy the update spreadsheets into the shared folder located at:</p> <p>...\\CWS-NS\\Project Management\\Schedule\\Schedule Update Sheets</p>
<p>14.</p>	<p>Copy the Schedule Update sheet to the PMO Schedule Management Site page, Current Schedule Update Report featured link.</p> <p>Copying can be done by dragging and dropping the schedule Update sheet onto the Schedule Update page.</p>
<p>15.</p>	<p>For each Schedule Update sheet, update the Doc Category to “Current Schedule Update Reports”, the Function Area to “PMO” and DOC Status to “Beta” by Right Clicking on the Schedule Update sheet name and selecting properties.</p> <p>The meta-data update screen will be display. Click on the labels next to each field to display the available values.</p> <div data-bbox="342 1220 1268 1587" style="border: 1px solid #ccc; padding: 10px;"> <p>Name * <input type="text" value="CWS-NS County Consultant Schedule Update .xlsx"/></p> <p>Title <input type="text"/></p> <p>Doc Category * <input type="text" value="Current Schedule Update Reports"/> </p> <p>Functional Area <input type="text" value="PMO"/> </p> <p>Doc Status * <input type="text" value="Beta"/> </p> <p>Version: 2.0 Created at 6/19/2017 2:54 PM by <input type="checkbox"/> Spolidoro, Mark@OSI Last modified at 6/30/2017 3:50 PM by <input type="checkbox"/> Spolidoro, Mark@OSI</p> <p style="text-align: right;"><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p>Select Save when the updates are complete.</p>
<p>16.</p>	<p>Repeat Part 1, Steps 6 to 12 for each of the remaining teams listed in S_Team (Text3) column.</p>
<p>17.</p>	<p>End of Part 1</p>

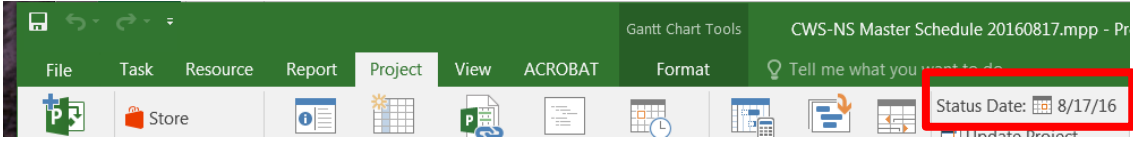
Part 2: Updating the Schedule Update Sheets

The CWS-NS Service Manager, their designee or backup is responsible for using the Schedule Status Update Report to update the status of their portion of the schedule. This report is due back to the Scheduler by close of business, Wednesday of status weeks. The process for updating the Schedule Status Update Report is described in the table below:

Step	Description
1.	<p>Located the Schedule Update sheet for your team at the PMO Schedule Management Site page, Current Schedule Update Report featured link.</p> <p>Open the Schedule Update sheet in edit mode.</p>
2.	<p>For each non highlighted (yellow) task, update the start and finish columns based on either the actual start/finish dates or based on projected start/finish dates.</p> <p>Note: CWS-NS Scheduler will assume that if the dates are in the past they are actual start or finish dates and if they are in the future they are projected start or finish dates</p>
3.	<p>For each non highlighted (yellow) task, provide an updated % complete.</p>
4.	<p>If the start date for a task has arrived, show a percent complete greater than zero, or if work has not started, provide a revised start date.</p>
5.	<p>If the finish date has passed, and the task is not 100% complete, provide an updated planned finish date.</p>
6.	<p>If tasks are substantially behind schedule provide a reason for the delay in the Notes column.</p>
7.	<p>When all updates are complete, save the updated Schedule Update sheet</p>  <p>using the Excel save icon , then close Excel.</p>
8.	<p>End of Part 2</p>

Part 3: Making Preliminary Schedule Updates

The CWS-NS Scheduler updates the schedule carefully reviewing each change to identify the overall impact on successor tasks and key milestones. This process is performed on Thursday of a Status week. The process for entering and analyzing these preliminary updates is described in below:

Step	Description
1.	<p>On Wednesday of an update week, open current version of the project, select the Project tab and make sure the Status Date is the Friday of the current week for that reporting period</p> 
2.	<p>Select the S_Bi-weekly Update Report view</p> <p>This view contains the following columns:</p> <ul style="list-style-type: none"> • Id • Unique ID • S_Numeric Status (Number 1) • Task Name • Summary • S_Task Lead • Duration • % Complete • Start • Finish • Resource Names • S_Bi-weekly Status (Flag 7).
3.	Open an updated spreadsheet that has been received from the task owner
4.	Update the % Complete, making adjustments to Duration if necessary to accommodate new Finish dates.
5.	Type in the start, finish, and % complete updates one at a time. After each update look to see if other tasks are highlighted as a result of the change.
6.	Save and close the schedule.
7.	End of Part 3

Part 4: Additional Schedule Updates

To track actual submittal and approval dates of Executive Milestones and Key Deliverables in a timely fashion or changes task to reflect the actual working being performed, the schedule may be updated outside of the normal bi-weekly update cycle.

End of Procedure