


CWDS SM Procedure 102 – Completing the Schedule Update Report

Audience: CWDS Scrum Masters
Frequency: Every Status Week
Created: 4/20/2016
Last Updated: 7/13/2016

After reading this you will be able to provide schedule updates using the CWDS Schedule Update Report. Service Managers and Scrum Masters, their designee or backup are responsible for using the Schedule Update Report to update the status of tasks assigned to their service team. This report is distributed to Service Managers and Scrum Masters on Monday of a Status Week, and is due back to the Scheduler by close of business on Wednesday. The procedure for updating the Schedule Update Report is described below. Training on this procedure is available by request.










Prerequisites:

- MS Excel
- MS Outlook
- MS SharePoint

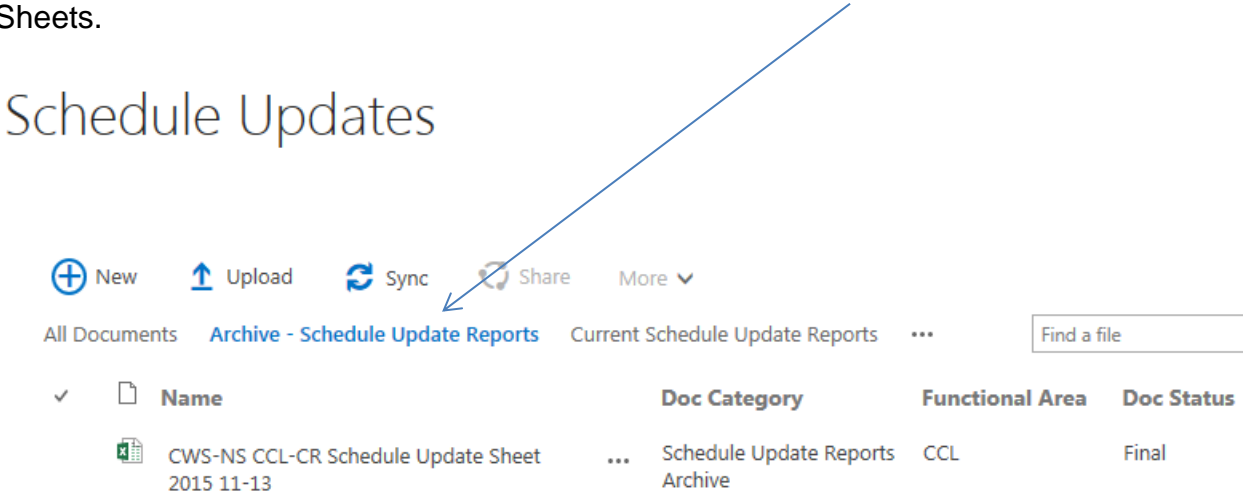
Step	Description
1.	<p>Schedule Update Reports will be posted to the SharePoint Schedule Management site Schedule Management Site by noon on Mondays of a Status Week.</p> <p>The Scheduler will notify <i>Service Managers and Scrum masters</i> by email when the “sheets” are posted.</p> <p>The <i>Scrum Masters</i> will notify <i>Team Members</i> that the update sheets have been posted, and that the Team Members may begin making updates.</p> <p>All updates should be completed by COB Wednesday.</p>
2.	<p>After landing on the Schedule Management site, click on “Current Schedule Update Reports” featured link shown below.</p> 

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3.	<p>You will land on the Current Schedule Update Reports page.</p>																																																																																																		
4.	<p>Locate the Schedule Update Sheet belonging to your Team, then open the update sheet.</p>																																																																																																		
5.	<p>Verify that the Team Name, Scrum Master and Week Ending date are correct.</p> <table border="1"> <thead> <tr> <th>Plan Status</th> <th>Task Name</th> <th>Summary</th> <th>Task Lead</th> <th>Planned Duration</th> <th>% complete</th> <th>Planned Start</th> <th>Planned Finish</th> <th>Resources</th> <th>Updated Start</th> <th>Updated Finish</th> <th>Updated % Complete</th> <th>Resource Updates</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td></td> <td>CWS-NS SFY12-13</td> <td>Yes</td> <td></td> <td>2178.25 days</td> <td>37%</td> <td>Fri 6/1/12</td> <td>Wed 2/17/21</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>●</td> <td>Develop Bidders Share Point Access/Site</td> <td>Yes</td> <td>Joyce</td> <td>76 days</td> <td>85%</td> <td>Mon 11/10/14</td> <td>Thu 3/5/15</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>●</td> <td>Create User IDs & Passwords for Bidders access to Library</td> <td>No</td> <td>Joyce</td> <td>12 days</td> <td>0%</td> <td>Tue 2/17/15</td> <td>Thu 3/5/15</td> <td>F_Mai Pham(20%),F_Joyce</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>Manage Bidders Library Documents</td> <td>Yes</td> <td>Joyce</td> <td>229.25 days</td> <td>47%</td> <td>Wed 10/8/14</td> <td>Tue 9/8/15</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>●</td> <td>Bidders Library Phase 2 (Stakeholder/Vendor Review)</td> <td>Yes</td> <td>Joyce</td> <td>75 days</td> <td>75%</td> <td>Thu 11/20/14</td> <td>Thu 3/12/15</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>●</td> <td>Track Bidder Library Documents for Phase 2</td> <td>No</td> <td>Joyce</td> <td>75 days</td> <td>68%</td> <td>Thu 11/20/14</td> <td>Thu 3/12/15</td> <td>F_Joyce Humphrey(30%),F_Ma</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Plan Status	Task Name	Summary	Task Lead	Planned Duration	% complete	Planned Start	Planned Finish	Resources	Updated Start	Updated Finish	Updated % Complete	Resource Updates	Notes		CWS-NS SFY12-13	Yes		2178.25 days	37%	Fri 6/1/12	Wed 2/17/21							●	Develop Bidders Share Point Access/Site	Yes	Joyce	76 days	85%	Mon 11/10/14	Thu 3/5/15							●	Create User IDs & Passwords for Bidders access to Library	No	Joyce	12 days	0%	Tue 2/17/15	Thu 3/5/15	F_Mai Pham(20%),F_Joyce							Manage Bidders Library Documents	Yes	Joyce	229.25 days	47%	Wed 10/8/14	Tue 9/8/15							●	Bidders Library Phase 2 (Stakeholder/Vendor Review)	Yes	Joyce	75 days	75%	Thu 11/20/14	Thu 3/12/15							●	Track Bidder Library Documents for Phase 2	No	Joyce	75 days	68%	Thu 11/20/14	Thu 3/12/15	F_Joyce Humphrey(30%),F_Ma					
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6.	<p>Notice the Schedule Update Report contains two main sections:</p> <ul style="list-style-type: none"> • The left side of the sheet contains the tasks that require attention • The right side of the sheet contains either yellow or gray highlighted cells, this is the area where updates are recorded. 																
7.	<p>Team Members provide task updates using the gray shaded cells only: the yellow shaded cells are Summary tasks. Summary task updates will be calculated by MS Project based upon the information you place in the <i>grey</i> shaded cells.</p>																
8.	<p>For each task with corresponding grey cells, update the Updated Start Date and Updated Finish Date 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 updated dates are in the past they are actual Start Date or actual Finish Date. If they are in the future, they are projected Start Date or Finish Date.</p>																
9.	<p>For each task with a corresponding grey cells, provide an updated % Complete if appropriate.</p>																
10.	<p>If the Start date for a task has arrived:</p> <ul style="list-style-type: none"> • show an updated % Complete greater than zero • or if work has not started, provide an updated Start Date 																
11.	<p>If the Finish date has passed, and the task is not 100% complete, provide an updated planned Finish Date.</p>																
12.	<p>If tasks are substantially behind schedule provide a reason for the delay in the Notes column.</p>																
13.	<p>The Excel tab named “Legend” provides the description of the graphical indicators found on the Schedule Update Report.</p> <div data-bbox="219 1396 1226 1806" style="border: 1px solid gray; padding: 5px;"> <p>Legend for Plan Status Field</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Test for 'S_Plan Status'</th> <th style="width: 30%;">Value(s)</th> <th style="width: 20%;">Image</th> <th style="width: 20%;"></th> </tr> </thead> <tbody> <tr> <td>equals</td> <td>R</td> <td></td> <td></td> </tr> <tr> <td>equals</td> <td>Y</td> <td></td> <td></td> </tr> <tr> <td>equals</td> <td>G</td> <td></td> <td></td> </tr> </tbody> </table> <p>Red: Should have finished Yellow: Scheduled to finish in next 7 days Green: Scheduled to finish in next 21 days</p> </div>	Test for 'S_Plan Status'	Value(s)	Image		equals	R			equals	Y			equals	G		
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14.	<p>Use the Notes column to enter edits to Resources. Be sure to notify the Scheduler when staff join or leave the project.</p>																

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15.	When a Team Member is finished making updates, close the file, be sure it is “checked in”, and notify the Scrum Master that you are finished with your updates.
16.	When the entire Team is finished with their updates, the Scrum Master notifies the Scheduler via email that the updates for their team are complete.
17.	The scheduler will make updates to the Project Master Schedule on Thursday of a status week then perform QA on the schedule prior to publishing the schedule to SharePoint on Friday.
18.	<p>The Scheduler will then set the Doc Status to “Live” and archive the Schedule Update Sheets.</p>  <p>The screenshot shows a SharePoint document library interface. At the top, there are navigation buttons: New, Upload, Sync, Share, and More. Below these are breadcrumb links: All Documents, Archive - Schedule Update Reports, and Current Schedule Update Reports. A search box labeled 'Find a file' is on the right. The main area displays a table with columns: Name, Doc Category, Functional Area, and Doc Status. A single document is listed with the name 'CWS-NS CCL-CR Schedule Update Sheet 2015 11-13', a category of 'Schedule Update Reports Archive', a functional area of 'CCL', and a status of 'Final'. A blue arrow points from the 'Share' button in the top navigation bar to the 'Doc Status' column of the document row.</p>
	End of procedure