CWDS SM Procedure 105 – Schedule Metric Dashboard

Audience: CWDS Project Managers and Scrum Masters
Frequency: Every Status Week
Last Updated: 4/20/2016

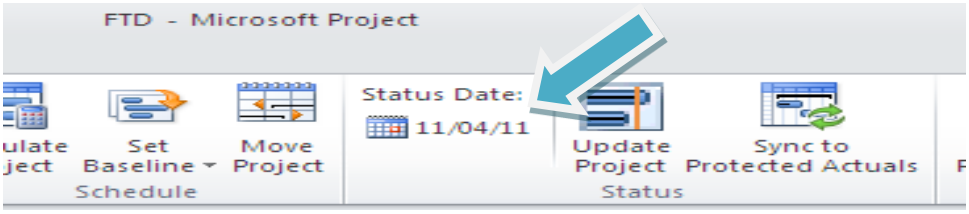
After reading this you will be able to use MS Project to display the Schedule Dashboard *view.* The Schedule Dashboard is a custom MS Project *view* that is described in the Schedule Management Plan, Section 6.4.7.2. The Schedule Dashboard view displays schedule performance against the project-level boundary conditions as described in the Schedule Management Plan Section 4.1, Definitions. All values are recalculated every time the report is opened, so status will always be as of day the view is applied.

Prerequisites:

- MS Project Professional

Views\tables\filters used: S_Schedule Dashboard *view*, S_Schedule Dashboard *table*

Part 1. Generate the Schedule Dashboard *view:*

Step	Description
1.	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 current status week, then expand all tasks. Press F9 after changing the status date to force a recalculation. 
2.	Select and apply the **S_Schedule Dashboard** *view* This view contains the following fields: Id, Days Late, Plan Status, Base Status, Effort Status, Name, Duration, Target % Complete, % Complete, Start, Finish, Team Lead, Team. If columns do not match these then add or remove columns as needed.
3.	Filter the fields named in Step 2 above as appropriate to obtain the desired information.
4.	When analysis is complete, return the schedule to the Gantt view
5.	Close the schedule. End of Part 1

Part 2: Field Names, Formulas and Graphical Indicators used in the Schedule Dashboard *view.*

Days Late (Text 24) is field is calculated using the following formula:

Formula:

IIf([% Complete]<100 And (Date10-[Finish]>0),Round([Date10]-[Finish]),"")

Graphical Indicator: None

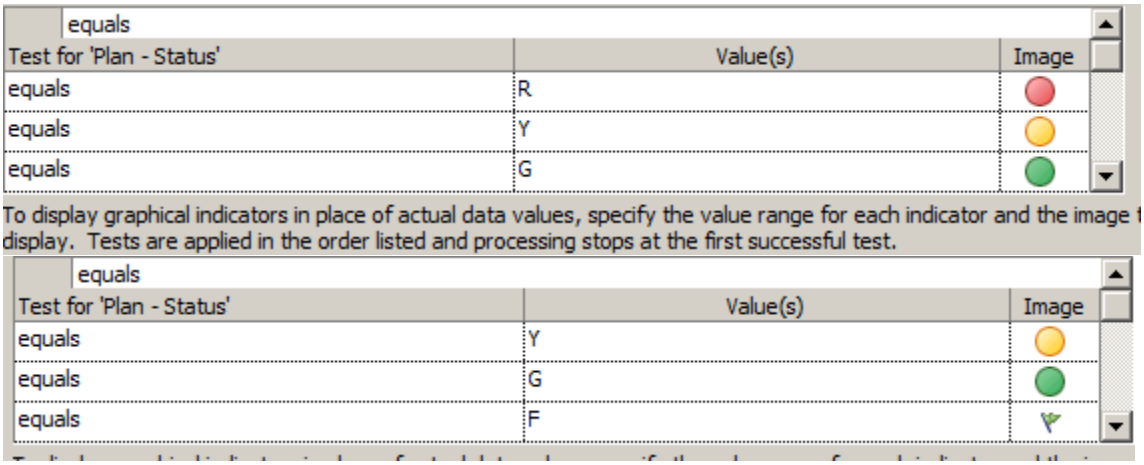
Plan Status (Text 25) field calculates and identifies actual performance against the plan for a task. This may differ from the baseline for a task, because the plan is the working copy while the baseline is the standard for measurement.

Formula:

IIf([% Complete]<100 And [Scheduled Finish]<[Date10]-1,"R",IIf([% Complete]<100 And [Scheduled Finish]<[Date10]+7,"Y",IIf([% Complete]<100 And [Scheduled Finish]<[Date10]+21,"G",IIf([% Complete]<100 And [Scheduled Finish]<[Date10]+30,"F",""))))

Graphical Indicators:

There will be four indicators for this field. A Red circle would mean that the task is late as of today (assuming today is the day of analysis). A Yellow circle would mean that the task is scheduled to finish in the next seven days from today. A green circle would mean that the task is scheduled to finish in 8 - 21 days from today. A green flag would mean that the task is scheduled to finish in 22 - 30 days from today.



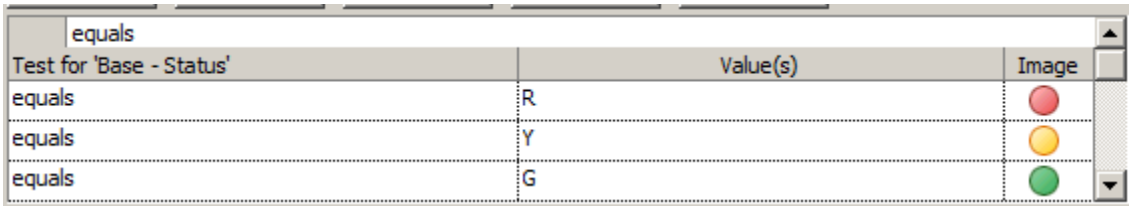
Base Status (Text 26) field calculates and measures the variance between the *Baseline Finish* date and the *Finish* date.

Formula:

IIf([% Complete]<100 And [Scheduled Finish]-[Baseline Estimated Finish]>=20,"R",IIf([% Complete]<100 And [Scheduled Finish]-[Baseline Estimated Finish]>10,"Y",IIf([% Complete]<100 And [Scheduled Finish]-[Baseline Estimated Finish]>5,"G","")))

Graphical Indicators:

A Red circle would mean that the planned finish date for the milestone has exceeded the 20 day boundary condition, and a change request or corrective action is required. A Yellow circle would mean that the planned finish date for the milestone has exceeded 10 days of variance and needs to be monitored. A Green circle would mean that the planned finish date for the milestone finish date has exceeded five days of variance and needs to be monitored.



equals		
Test for 'Base - Status'	Value(s)	Image
equals	R	
equals	Y	
equals	G	

Finish Variance Days (Text 28) field calculates the number of variance days between the *Baseline Finish* date and the *Finish* date. The result is a numerical indicator of severity.

Formula:

IIf([% Complete]<100 And Round([Scheduled Finish]-[Baseline Estimated Finish])>0,Round([Scheduled Finish]-[Baseline Estimated Finish]),"")

Graphical Indicator**:** None

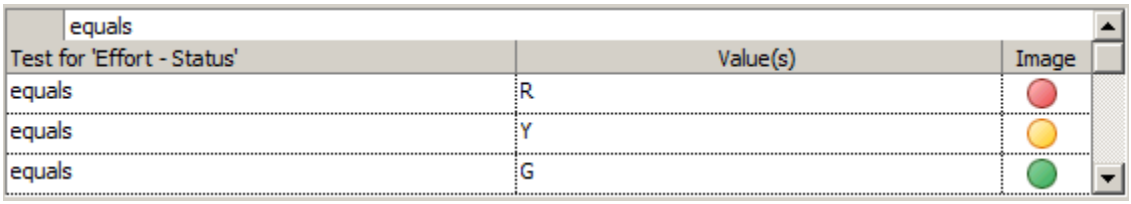
Effort Status (Text 27) field measures the variance between the *Baseline Work* value and the *Work* value.

Formula:

IIf([% Complete]<100 And [Work]>([Baseline Work]*1.1),"R",IIf([% Complete]<100 And [Work]>([Baseline Work]*1.05),"Y",IIf([% Complete]<100 And [Work]>([Baseline Work]*1.025),"G","")))

Graphical Indicators:

A Red circle would mean that the ***Work*** value for a task has exceeded the 10% variance boundary condition[1], and a change request or corrective action is required. A Yellow circle would mean that the ***Work*** value for a task has exceeded a 5% variance and needs to be monitored. A Green circle would mean that the ***Work*** value for a task has exceeded a 2.5% variance and needs to be monitored.



equals		
Test for 'Effort - Status'	Value(s)	Image
equals	R	
equals	Y	
equals	G	

Variance Hours (Text 29) field calculates the number of variance hours between the *Baseline Work* value and the *Work* value. This will be a numerical indicator of severity.

Formula:

IIf([% Complete]<100 And [Work]>([Baseline Work]*1.1),([Work]-[Baseline Work])/60,IIf([% Complete]<100 And [Work]>([Baseline Work]*1.05),([Work]-[Baseline Work])/60,IIf([% Complete]<100 And [Work]>([Baseline Work]*1.025),([Work]-[Baseline Work])/60,""")))

Graphical Indicator: None

% Variance is the field used to calculate the percentage of variance between the *Baseline Work* value and the *Work* value.

Formula:

IIf([% Complete]<100 And [Work]>([Baseline Work]*1.1),Round((((([Work]-[Baseline Work])/60)/[Work])*100)*100)),"")

Graphical Indicator: None

End of Part 2
End of Procedure

[1] The effort variance can be + or – 10%. While an increase of 10% is considered to be more critical because it is adding cost to the effort, a variance of -10% may indicate that less effort will be expended on the task. This could signal a reduction in quality, an indication of poor estimation or crashing of the schedule to get back on schedule.