ProjectPro Forecast Scheduling Application for Microsoft Project

ProjectPro **Forecast Scheduling App** (FSA) comes with 86 built-in Forecast Scheduling and 14 DCMA checks; a total of 100 checks. Of these 100 checks 65 are automated checks . FSA helps you perform the remaining 35 manual checks . You can select any subset of checks that are applicable to your schedules.

The main benefits of FSA are:
- You will use industry-tested best practices for scheduling projects from trusted sources:
  - The textbook **Forecast Scheduling** by Eric Uyttewaal, PMP, MVP Project and his team, or
  - The 14 point checklist from DCMA (Defense Contract Management Agency).
- You are guided in improving your schedule using a structured checklist. If you need a refresher on what the check is about, you can click on its label and you will see a short explanation with further page references to the Forecast Scheduling book.
- You will save yourself many clicks; FSA immediately modifies the MS Project screen for you (views and fields) so you can start improving your schedules.
- You can output a schedule evaluation report automatically to MS Word.

FSA is designed for two target groups:
- Schedulers who would like to improve their schedules (see below) and
- Schedule auditors who need to provide feedback on a project schedule (read first two steps below, then click here).

Schedulers use the tools provided on the left-hand side in the narrow FSA screen (, ,) and auditors will use the tools on the right-hand side (and the red numbers like 6).

Schedulers

FSA appears on the right-hand side of your monitor so you can see it AND your schedule in MS Project at the same time. For each check, your schedule passes or fails . Schedulers typically use the left-hand side of the narrow FSA screen and use the tools shown in front of the names of the checks: , and .

Schedulers would typically follow this sequence when working with FSA:

1. Prepare for schedule evaluation .
2. Run the automated checks .
3. Click each button and improve the schedule.
4. Perform the manual checks and improve your schedule as you go along.

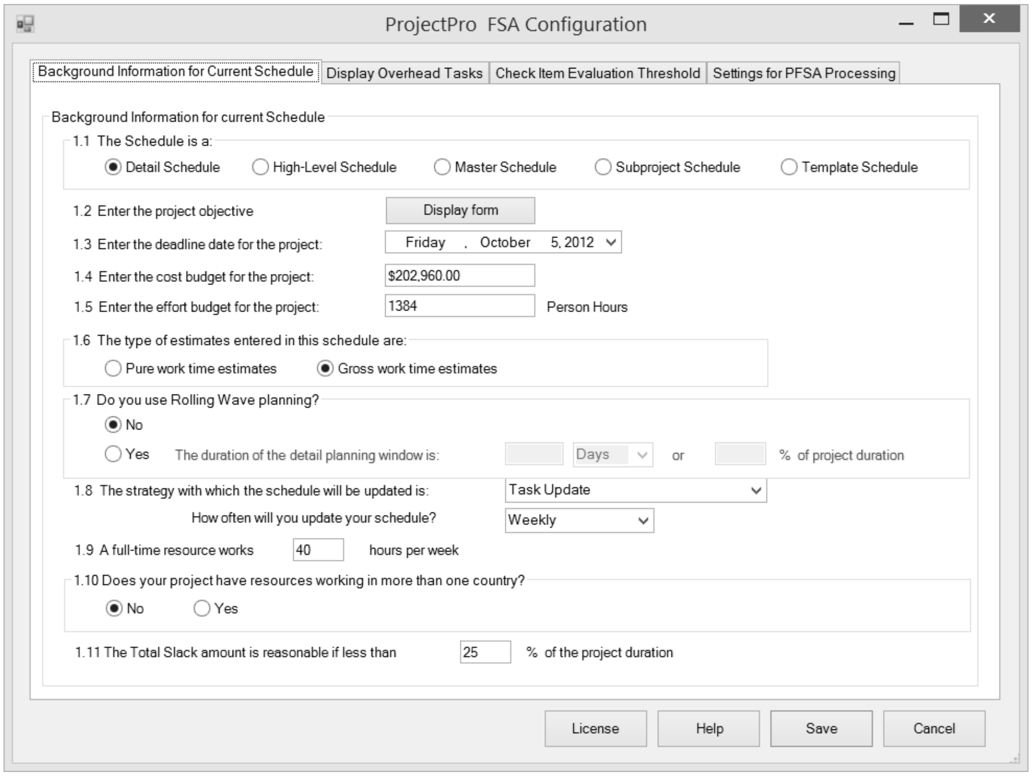
We will now discuss each step in more detail:

1 Prepare for Schedule Evaluation

We need to do three things before running FSA:
- Provide background information about the schedule
- Mark the overhead tasks (overhead tasks are exceptions for many checks and need to be marked first).
- Select the checks to apply to your schedule

Provide background information

Next you provide background information about the schedule: click to display the **ProjectPro FSA Configuration** dialog and click the first tab **Background Information for Current Schedule**; the following screen appears:



Under **Background Information** you answer the questions 1.1 – 1.11. We will discuss them in more detail:

1.1: FSA is programmed to run on a **Detail Schedule** and **Subproject Schedule**, for the other situations, some checks do not apply or need to be modified.

1.2: You enter the objective of the project.

Notice that FSA fills in certain defaults automatically:
- 1.3: The current project deadline date; please revise if needed.
- 1.4: The current total cost for the project (to give the scheduler context). Please, enter the real budget available for the project.
- 1.5: The current total effort in the project. Enter the real effort budget (if known).

The answers are used by one or more checks in the evaluation, for example, your answer under 1.4, the cost budget, is used by check **9.3 Cost within Budget**. Please review these default answers and adjust them accordingly. If you do not adjust them, FSA will pass several checks automatically: i.e. check 9.1-9.3.

1.6: You enter the type of estimates you collected from your team members: **Pure Work Time** estimates are effort estimates expressed in hours spent 100% productively on making progress on project tasks. **Gross Work Time** estimates are effort estimates that include all administrative tasks (email etc.), personal time (breaks etc.) and time off (vacation etc.).

1.7 Rolling Wave: if you use Rolling Wave planning, you should apply the checks only on the portion of the schedule that falls within the detailed planning window.

1.8 **The strategy with which the schedule will be updated**: **Task Update** means you enter update information on the level of tasks, for example you update the *Actual Duration* on the task *Write Report*. **Assignment Update** means you enter update information on the level of assignments, for example you enter the *Actual Work* and *Remaining Work* hours for *Nancy* on the task *Write Report*. See chapter 11 in the **Forecast Scheduling** book for more details on the difference between these update strategies.

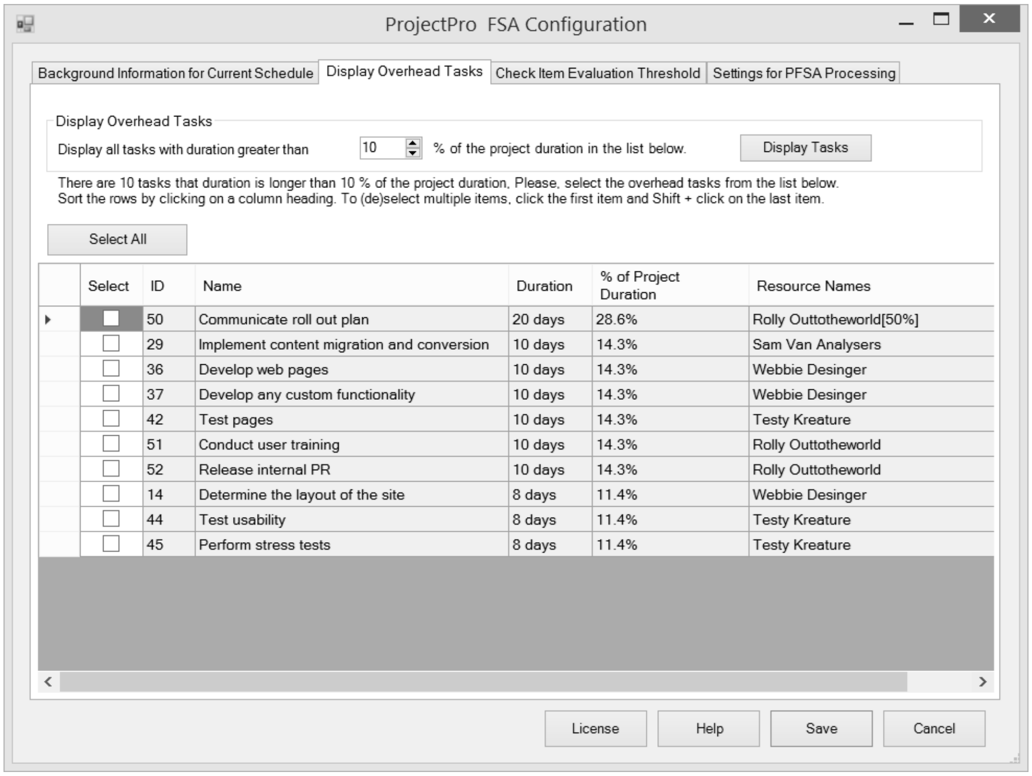
1.9 **A fulltime resource works … hours per week**: You enter here how many hours a typical resource works per week in your company.

1.10 You enter in which countries your project resources work, which affects the Base Calendars you need to set up.

1.11 Total Slack: we will use Total Slack as a measure for the correctness and completeness of the network logic for check 5.7. The larger the Total Slack value, the less likely it is correctly hooked up in the network of dependencies.

Mark the Overhead Tasks

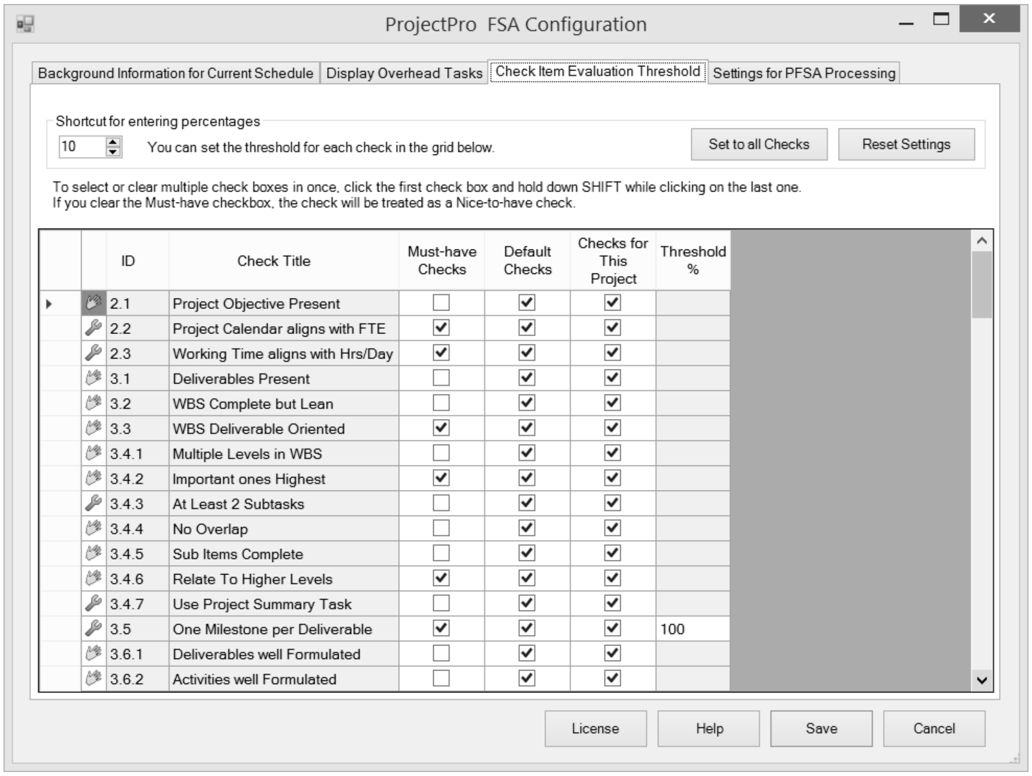
Next you mark the overhead tasks by clicking to display the **ProjectPro FSA Configuration** dialog and clicking tab **Display Overhead Tasks**; the following screen appears:



The tasks with a long duration are displayed and are sorted on duration, which typically puts the overhead tasks at the top of the list. In the column **Select** you mark the overhead tasks to tell FSA which tasks in the task list are overhead tasks. Overhead tasks are exceptions to many checks (level of detail, complete network logic) and FSA therefore needs to know them. Click button **Save** when done.

Select the checks to Apply

You can select the checks to apply in this schedule evaluation by clicking to display the **ProjectPro FSA Configuration** dialog and clicking tab **Check Item Evaluation Threshold**; the following screen appears:



FSA comes with factory settings for all checks that we, at ProjectPro, have found to be good settings for most schedule evaluations. You can always go back to these factory settings by clicking button **Reset Settings**. You can select your own settings:

- **Must Have Checks** are checks that must pass for the schedule to pass. All checks not marked as **Must Have** checks are by definition **Nice-To-Have** checks.
- **Default Checks** are checks that should be applied to all schedules on your computer from here on forward. FSA will save these in your Windows Registry so they appear the same in each future schedule.
- **Checks for This Project** allows you to divert from the default checklist for this particular project; select here the checks you want to run on just this project.

Click the button **Save** when done or click the next tab.

2 Run the Automated Checks .

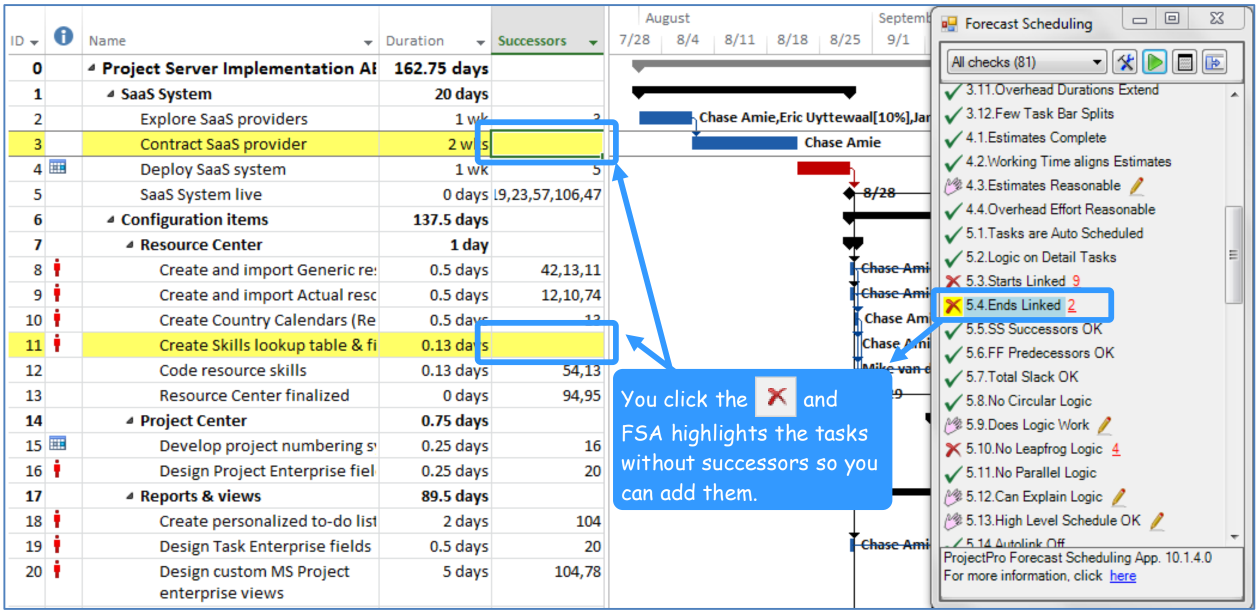
When you click the button you will see that all indicators for automatic checks ( ) are replaced with a pass or fail indicator. You can now click the indicator to find which tasks or resources violate that check.

In order to find the violators more easily, select the item **Failed Checks** from the list All checks (100). This will display only the checks that failed, which allows you to focus on where your schedule needs improvement.

3 Click each Button and Improve the Schedule

When you click the indicator for the first time, FSA will adjust the MS Project screen and only display the violating tasks (or resources). FSA applies a filter; you can easily take the filter off by pressing F3 on your keyboard to see all tasks/resources again.

When you click the indicator for a second time, FSA highlights the violators and allows you to improve your schedule. For example, check 5.4 displays the tasks that need their ends linked and creates the view to do this. This way you can improve your schedule efficiently:



If you made an improvement and would like to see that it makes a difference, click on the name of the check and FSA offers to run just that check again (button **Run this check now**) and you can track your progress: You should see that the red number of violators behind the check name decreased and, eventually, that the red in front of the check name changes into a green checkmark. Your schedule now passes this check. For many checks all violators need to be addressed, for some checks that have a percentage threshold, the threshold needs to be met.

4 Perform the Manual Checks and Improve your Schedule

All manual checks are marked with the icon. In order to find them more easily, select the item **Manual Checks** from the list All checks (100). This will display only the manual checks.

Now click each icon and FSA will adjust the screen in such a way that you can perform the check yourself. FSA will display the right columns and only the tasks/resources that you need to determine if the schedule passes the check. FSA often applies a filter that you can easily remove by pressing F3 on your keyboard. If you need an explanation what to look for performing the check manually, click the name of the check.

For some manual checks you need to select a task first, for example for check 3.4.6 to display all its higher level summary tasks. The screen tip of the icon will tell you if you first need to select a task; just click on FSA and hoover your mouse pointer over the hand to see its screen tip: These checks are: 3.4.6 and 3.6.1 - 3.6.3.

You can perform the manual check on all tasks in the schedule or on a random sample of tasks; when a schedule is large, we recommend sampling. When you manually pass a check, the indicator appears and as soon as you have identified a violator, the indicator appears.

Schedule Auditors

Schedule Auditors typically use the right-hand side of the narrow FSA screen and use the tools shown behind the names of the checks. As an auditor, you would use FSA typically in the following way:

1. Prepare for schedule evaluation .
2. Run the automated checks .
3. Click each red number behind each check (like 6) and confirm the violators.
4. Perform the manual checks and mark the violators.
5. Review the overall quality of the schedule.
6. Generate a detailed audit report for the schedule owner.

For steps 1 and 2, see the steps for the schedulers. The steps that are unique for auditors and that may need more explanation are:

3 Click each Red Number behind each Check (like 6) and Confirm the Violators

The red number behind the check name indicates how many violators FSA found in your schedule. However, sometimes you want to adjust the automatic assessment. For example:

- For check 3.9 FSA has marked many tasks that are just over 10% of the project duration and you want to unmark these as tasks that have a duration that is too long (violators).
- For check 5.3 FSA has marked many tasks without their start linked up, however, you can see that these are tasks waiting for external supplies to arrive and have a Start-No-Earlier-Than date; these are legitimate exceptions for this check. You clear those as violators.
- For check 6.4 FSA has marked all tasks with a date constraint, but the scheduler has a valid reason for some constraints and explained them in a Note on the task. You clear those as violators.
- For check 7.4.1 FSA displays all resources with Max Units greater than 100%. The Max Units should not be greater than 100% for individuals, but can be greater than 100% for generic or consolidated resources (legitimate exception). You clear those as violators.
- For check 7.4.4 FSA marked generic resources (e.g. programmer) as resources without a resource vacation (legitimate exception). You clear those as violators.

As you can see, for many checks there are legitimate exceptions and you have to unmark them as violators if you want your report to be accepted as is and to minimize the discussion with the schedule owner. You can unmark them by clicking the red number (like 6) and clearing the checkmarks in front of the items that you assess as legitimate exceptions to the rule. FSA will summarize how many you cleared and confirm this with you.

4 Perform the Manual Checks and Mark the Violators.

Manual checks are checks that need an expert eye to make an evaluation of the schedule. Auditors can really add value with these manual checks. FSA supports you by creating views that help perform these checks more efficiently. You just need to click the pencil tool and analyze the screen FSA presents. You respond to the screen to pass or fail the check. When you identify violators and make suggestions for improvements, FSA will fail the check and include your suggestions in the evaluation report.

For some manual checks you need to select a task first, for example for check 3.4.6 to display all its higher level summary tasks. The screen tip of the icon will tell you if you first need to select a task and what type of task; just click on FSA and hoover your mouse point over the hand icon ( ) to see its screen tip. These checks are: 3.4.5 - 3.4.6, 3.6.1 - 3.6.3, 3.7 and 4.3.

When you pass a check, the appears and when you fail a check, the appears.

5 Review the Overall Quality of the Schedule

You can review the overall quality of the schedule in the following ways:

- You can click the list All checks (100) and look at the numbers behind the items:
    - **Checks for this project**: this number tells you how many checks you had selected to be performed on this schedule.
    - **All failed checks**: this number tells you how many checks failed.
    - **All passed checks**: this number tells you how many checks passed.
    - **Checks not performed**: this number is the number of manual checks that you have not performed yet plus the number of checks that could not be performed (data missing) marked with a ? .
- You click the expand button in FSA and the entire checklist appears; you can now see in one blink how good the schedule is (if you select **All checks** from the All checks (100) list). When you click the **Go back to narrow form** button , the screen will become narrow again.
- You click the report button and you look at the **Overall Schedule Assessment** screen that appears. This screen will tell you how many checks were performed. On this screen you can also click the button **Output all confirmed violations in a report (MS Word)** and FSA will provide all detailed feedback in an MS Word report.

6 Generate a Detailed Audit Report for the Schedule Owner

You click the report button and you click the button **Output Report (Word File)** and FSA will provide all detailed feedback in a Microsoft Word report. This report is detailed enough to be sent to the schedule owner.

The report will look like this:

Evaluation Report of Schedule: ***Project Server Implementation at ABC.mpp***

The following are points that need to be changed in your schedule:

Check	Schedule Feedback Text	Response
5.4	The following tasks do not have their end linked (loose ends). With loose ends in the network, the Critical Path calculation is not performed correctly. Can you give them a successor?	
5.3	The following tasks or milestones do not have a link to their start and seem to need one	

ID	Task
3	Contract SaaS provider
11	Create Skills lookup table & field

We recommend you present this report to the owner of the schedule and you verbally explain the points in the schedule that need improvement. Demonstrate the violators and the issues they cause. In this way, the schedule owner will understand your feedback and have a list to work from. It would be ideal if schedule owners also have FSA so they can improve their schedule efficiently using the and tools.

Call **613-692-7778** (Eastern Time Zone in North-America) or email **Support@ProjectProCorp.com** if you have questions!