Project Office Procedures for Monthly Progress Updates

Preparing Turnaround Reports

1) Create a new subfolder with the name "Mmmyy" (e.g. "Apr07") in the following folder:

   `\\Ppdserver\Neutrino.PPD\Project\Nova\Schedule\TurnAround_Reports`

2) Launch Open Plan and select, but do not open, the `NOVA_PROJECT` file in the Open Plan explorer view.

3) Go to the project Properties menu item, and select the `NOVA_PMB` baseline as Baseline 1, if it is not already selected.

4) Advance the project "Time Now" date to the desired date. Usually this will be the first day of the month following the month for which progress information is being requested.

5) Open the `NOVA_PROJECT` file in read-only mode.

6) Open the following barchart view: `NOVA_BARVW_5`. Verify that outlining is enabled for the view.

7) Apply the following bar set to the view: `BRS_Simple_MonthLast`

8) Apply the eight-month rolling window filter for the desired L2 subproject (e.g. `Rolling_EightMonth_Activities_DAQ`)

9) Expand the outline to show all (filtered) tasks

10) Print preview and adjust "print setup" and "print options" as necessary. Modify the title block, if necessary. (e.g. change WBS L2 number in header for each report)

11) Print/Save a pdf of the view in 11x17 format in the monthly turnaround reports folder created in step 1. Use the following filename convention for each L2 report:

    `WBSx.y_TurnAround_Gantt_Mmmyy.pdf`

12) Repeat steps 8-11 for each L2 subproject.

13) Using the Open Plan General Export called:

    `NOVA_Rolling 8 Month Turnaround-Activity Info For Turnaround Reports.`

    export the turnaround report information to a tab-delimited text file with the following name convention:

    `Mmmyy_TurnAround_Export.txt`

    and save it in the folder created in step 1.

14) Close the view and the `NOVA_PROJECT` file without saving and then reset “Time Now” back to the prior month’s setting that was in place before Step 4 was carried out.

15) Using Excel, open the tab-delimited .txt file, save it as an .xls file in the folder created in step 1, and then run the Excel formatting macro named "PrepStatusInfo " on the file. The macro can be found in the excel file called PrepStatusInfo_Macro" (docdb 3015). Re-save the turnaround report.xls file after running the macro.

16) Combine the pdfs and the Excel file in a single .zip file and post it to Nova Docdb 1919. Send e-mail notification of the posting and request for monthly progress information to L2 managers.

Entering Progress Information

1) Review the progress information returned by the level 2 managers (i.e. completed turnaround reports) for correctness and completeness. Pay particular attention to missing actual start and finish dates for activities in the past, remaining durations longer than the original durations, expected finish dates in the future that are inconsistent with the remaining durations, and percent completes. Contact the subproject managers for clarification of any progress information that is missing or incomplete. Note tasks where out-of-sequence progress is implied so it can be examined following time analysis.

2) Before entering any progress information for the month just ended, create a backup (.bk3) of the Nova project file in the following folder:

   `Ppdserver\Neutrino.PPD\Project\Nova\Schedule\Backups`

   Use the following filename convention: `NOVA_Mmmyy_BEFORE.bk3`

   where `Mmmyy` denotes the month for which progress information is to be entered into the file, time analyzed, and saved.

3) Open the Nova project file in exclusive mode and select the following view:

   `NOVA_BARVW_5`

4) Apply the following bar set to the view: `BRS_Simple_MonthLast`

5) Select and load the "Last Month" baseline as Baseline 1, if it is not already loaded.

   (CONTINUED ON NEXT PAGE)

6) Update the "Last Month" baseline using the following settings.

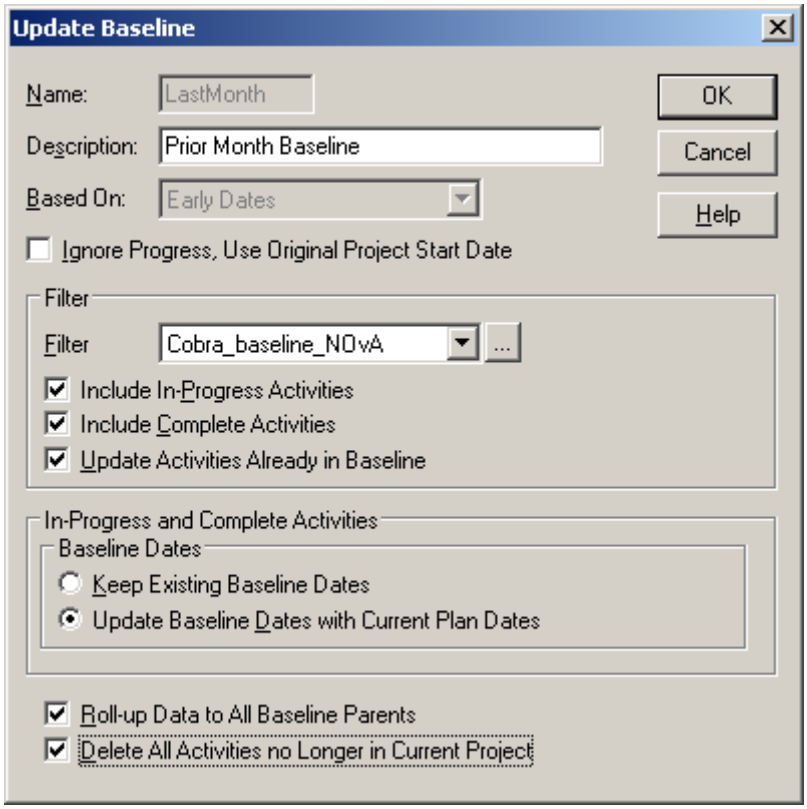

Figure 1 –Settings for updating/saving the previous month's schedule as a baseline

7) Save the project file.

8) Select and load the NOVA_PMB baseline as Baseline 1.

9) Advance the "Time Now" date to the appropriate date. Usually this will be the first day of the month following the month for which progress information is about to be entered.

10) Apply the appropriate filter for the subproject whose progress information will be entered. (e.g. `Rolling_EightMonth_Activities_Liquid_Scint`))

11) Enter the activity progress information provided by the L2 managers. This includes actual start/finish dates, expected finish dates, remaining durations, and/or percent completes. Save the file after subproject data entry is complete or more frequently if the information being entered is extensive.

12) Enter the appropriate physical percent completes and units complete (when appropriate).

13) Repeat progress information data entry for each L2 subproject after applying the appropriate L2 subproject filter. Save the information periodically.

14) After closing all open barchart views (to improve OP performance), update the resource remaining and actual quantities using the settings shown in figure 2. (Note: use the matching filter for the appropriate time window, if different from the nominal six-month look-ahead.)

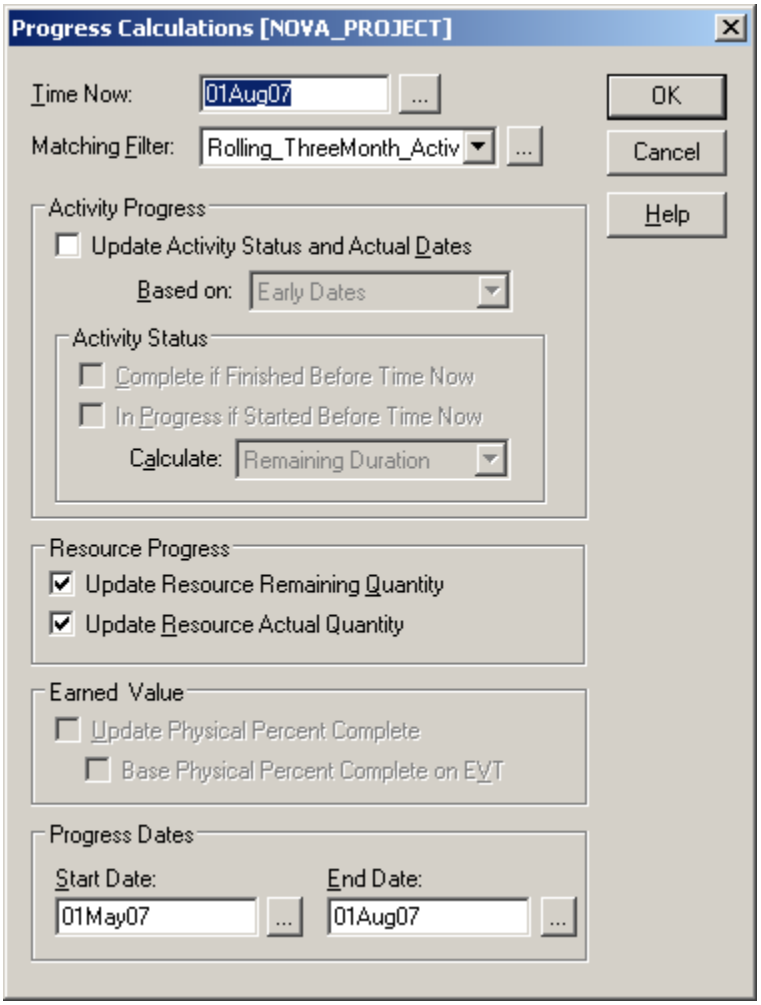

Figure 2 - Settings to update resource remaining and actual quantities after entry of activity progress info is complete. (Use the appropriate matching filter.)

15) Perform cost calculations to update budget, actual and remaining costs, and earned value.

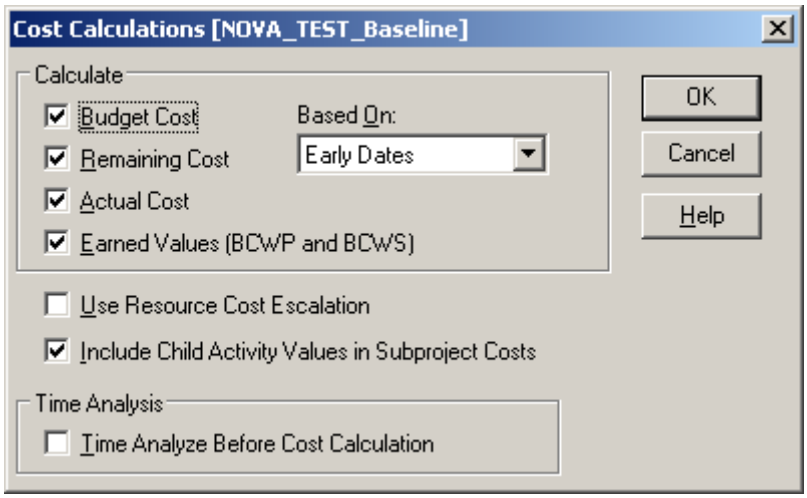

Figure 3 – Cost calculation options

16) Save the project file.

17) Close the project file.

18) Make a backup (.bk3) of the Nova project file. Use the following naming convention for the backup file:

    `NOVA_mmmyy_PROGRESS_INT.bk3`

    where `Mmmyy` denotes the current month for which progress information has been entered and the "_INT" indicates this is an interim backup after progress information has been entered but before time analysis and subsequent cost calculations have been performed.

    Save the .bk3 file in the following folder:

    `Ppdserver\Neutrino.PPD\Project\Nova\Schedule\Backups`

Analysis

1) Open the Nova project file in exclusive mode with no views open.

2) Verify that the time analysis out-of-sequence option is set to "Ignore Positive Lag of Predecessor" as shown in Fig 2

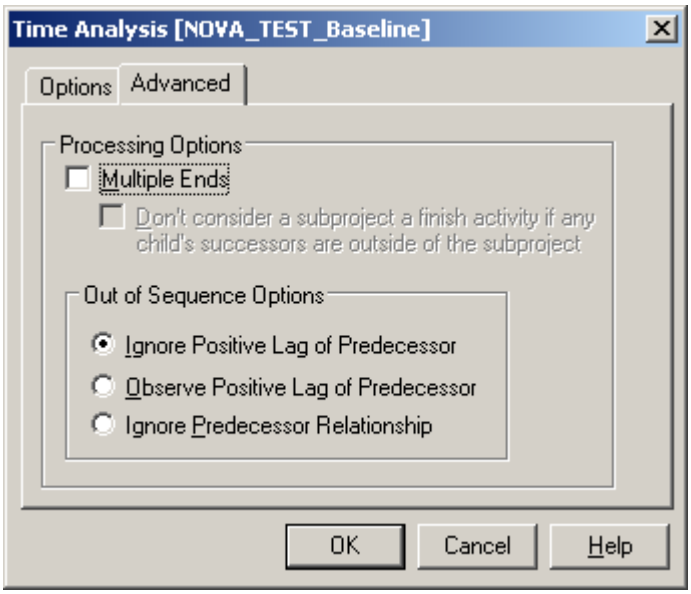

Figure 4 – Time analysis options

3) Perform time analysis.

4) Review the time analysis log for errors and warnings. Resolve any errors. Save the log file after the final time analysis is run.

5) Verify that NOVA_PMB is loaded as baseline 1. If it is not then make it so.

6) Perform cost calculations with the options shown in figure 5:

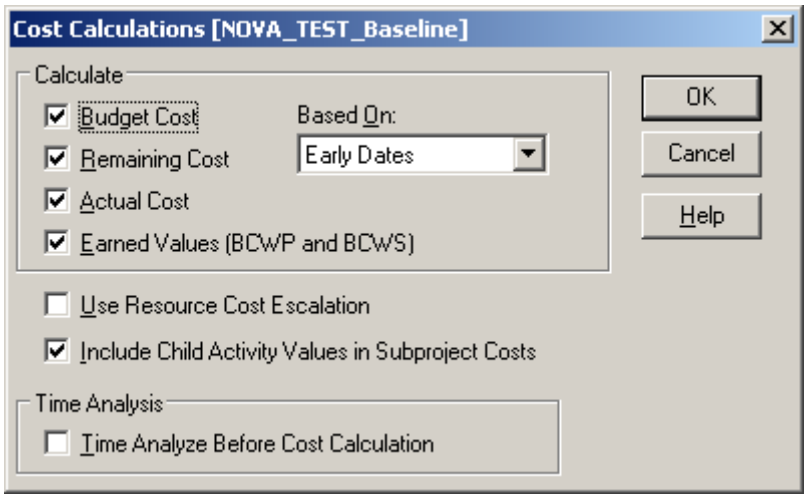

Figure 5 – Cost calculation options

7) Review the cost calculations log for any errors and warnings. Resolve any errors. Save the log file after the final cost calculation is run.

8) Update the cost and contingency information by performing, in the order given below,:

   a) UpdateContDollars (a batch global edit)

   b) RollupContingencyDollars (a rollup)

   c) UpdateContingencyPercents (a batch global edit)

9) Open the following views:

   a. NOVA_BARVW_Simple – a Gantt chart with baseline and progress bars

   b. NOVA_SPRDSHT_3 – a cost and contingency spreadsheet

   c. NOVA_BARVW_31 - a milestone Gantt chart

10) Inspect the schedule information using the above views. If satisfied with the analysis results, save the updated NOVA project file. If not, make corrections as needed, rerun and then save.

11) Close the file.

12) Make a backup (.bk3) of the Nova project file. Use the following naming convention for this backup file:

    `NOVA_Mmmyy_APPROVED.bk3`

    where `Mmmyy` denotes the <u>current</u> month for which progress information has been entered and "APPROVED" indicates that this is the final version of the file for that month.

    Save the .bk3 file in the following folder:

    `Ppdserver\Neutrino.PPD\Project\Nova\Schedule\Backups`

Producing Reports

Create a new subfolder for the Open Plan monthly progress reports with the name `Mmmyr` (e.g. Apr07) in the following folder:

`Ppdserver\Neutrino.PPD\Project\Nova\Schedule\Progress_Reports`

Save each of the reports produced below in this subfolder.

Bar Charts

PMB Baseline

1) Open the NOVA_PROJECT file.
2) Select the "NOVA_PMB" baseline as Baseline 1.
3) Open the following view: `NOVA_BARVW_Simple`
4) Apply the filter for the desired Level 2 subproject (e.g. `Nova_Liquid_Scintillator`)
5) Expand the outline to show all (filtered) tasks.
6) Select the timescale desired for printing under File → Print Options... (View tab)
7) Edit the title block information to correspond to the subproject being filtered/displayed, the progress month, etc.
8) Print/Save a pdf of the view (11x17 format, landscape), using the following filename convention: `WBSn.m_Gantt_Detail_Mmmyy.pdf`
9) Repeat for each Level 2 subproject.
10) Combine L2 barchart pdfs into a single .zip file called: `Gantt_L2_Details_Mmmyy.zip`

PMB Baseline – with Summary Budget Information

1) Verify that the "NOVA_PMB" baseline is loaded as Baseline 1
2) Open the following view: `NOVA_BARVW_Simple_77`
3) Apply the following filter: Cobra_baseline_NOVA
4) Expand the outline to show all (filtered) tasks.
5) Select the timescale desired for printing under File → Print Options... (View tab)
6) Edit the title block information to correspond to the information being filtered/displayed, the progress month, etc.
7) Print/Save a pdf of the view (11x17 format, landscape), using the following filename convention: `Gantt_AllWBS_WithBudgetInfo_PMB_Mmmyy.pdf`

Cost and Contingency Spreadsheet

L2 Rollup

1) Verify that the NOVA_PMB baseline is loaded as Baseline 1.
2) Open the following view: NOVA_SPRDHT_3
3) Repeat cost calculation, followed by the contingency global edits and rollup to ensure budgets are based on the currently loaded NOVA_PMB baseline.
4) Cancel any filter.
5) Collapse or expand the outline to level 2
6) Edit the title block information to indicate that all WBS are being displayed, include the progress month, etc.
7) Print/Save a pdf of the view (11x17 format, landscape), using the following filename convention: BudgetandContingency_L2_Rollup_Mmmyy.pdf

L2 Detail

1) Apply the filter for the desired Level 2 subproject (e.g. `Nova_Liquid_Scintillator`)
2) Edit the title block information to correspond to the subproject being displayed, the progress month, etc.
3) Expand outline to show all (filtered) tasks
4) Print/Save a pdf of the view (11x17 format, landscape), using the following filename convention: `WBSx.m_BudgetandContingency_L2_Detail_Mmmyy.pdf`
5) Repeat steps 1-4 for each Level 2 subproject.
6) Combine L2 cost and contingency pdfs into a single .zip file called: `BudgetandContingency_L2_Details_Mmmyy.zip`

Milestones

PMB Baseline – All milestones

1) Verify that the NOVA_PMB baseline is selected as Baseline 1.
2) Open the following view: `NOVA_BARVW_31`
3) Apply the following temp filter: `Milestones = [BOOL.T] & ESDATE >= {5/1/07}`
4) Verify that the appropriate subsectioning and sorting is being applied to the view. (i.e. subsection on WBS L2, with a pagebreak at each L2, sorted by <u>baseline</u> finish date)
5) Edit the title block information to correspond to the baseline being displayed, the progress month, etc.
6) Adjust the timescale as appropriate

7) Print/Save a pdf of the view (8.5x11 format, landscape), using the following filename convention: `Gantt_Milestones_PMB_Mmmyy.pdf`

8) Close the view.

PMB Baseline – Milestones – 6-month look-ahead for monthly report

1) Verify that the NOVA_PMB baseline is selected as Baseline 1.

2) Open the following view: `NOVA_BARVW_56`

3) Apply the following filter: `Rolling_6Month_Window_MilestonesOnly`

4) Verify that the appropriate subsectioning and sorting is being applied to the view. (i.e. subsection on WBS L2, sorted by baseline finish date)

5) Edit the title block information to correspond to the baseline being displayed, the progress month, etc.

6) Adjust the timescale as appropriate (usually -4/+11 months from Time Now)

7) Print/Save a pdf of the view (8.5x11 format, portrait), using the following filename convention: `MilestonesForMonthlyReport_Mmmyy.pdf`

8) Close the view.

PMB Baseline – Milestones – 1 yr look-ahead - L.0–L.4 Only

1) Verify that the NOVA_PMB baseline is selected as Baseline 1.

2) Open the following view: `NOVA_BARVW_37`

3) Apply the following filter: `Rolling_1Yr_Window_L0_L4_MilestonesOnly`

4) Verify that the appropriate subsectioning and sorting is being applied to the view. (i.e. subsection on milestone level, sorted by baseline finish date)

5) Edit the title block information to correspond to the baseline being displayed, the progress month, etc.

6) Adjust the timescale as appropriate (usually -3/+18 months from Time Now)

7) Print/Save a pdf of the view (8.5x11 format, landscape), using the following filename convention: `L0-L4_MilestoneGantt_Mmmyy_Format 2.pdf`

8) Close the view.

PMB Baseline – Milestones - L.1–L.2 Only

1) Verify that the NOVA_PMB baseline is selected as Baseline 1.

2) Open the following view: `NOVA_BARVW_446`

3) Apply the following filter:

```
Nova_Milestones_L1_L2 = [BOOL.T] AND ESDATE >={10/1/08}
```

4) Verify that the appropriate subsectioning and sorting is being applied to the view. (i.e. subsection on milestone level, sorted by baseline finish date)

5) Edit the title block information to correspond to the baseline being displayed, the progress month, etc.

6) Adjust the timescale as appropriate (usually "Range of Data")

7) Print/Save a pdf of the view (8.5x11 format, portrait), using the following filename convention: `L1-L2_MilestoneGantt_GE_FY08_Mmmyy_Format 3.pdf`
(Note: 90% scaling with 0.2" margins will allow milestones to fit on one pdf page.)

8) Close the view.

PMB Baseline – Missed Milestones

1) Verify that the NOVA_PMB baseline is selected as Baseline 1.

2) Open the following view: `NOVA_BARVW_59`

3) Apply the following temp filter:

   `Milestone_NotCompleted = [BOOL.T] & BFDATE < {'TimeNow'}`

   (Substitute the current 'TimeNow' date into the filter criteria, enclosed in braces.)

4) Verify that the appropriate subsectioning and sorting is being applied to the view. (i.e. subsection on activity ID level 2, sort by baseline finish date)

5) Edit the title block information to correspond to the baseline being displayed, the progress month, etc.

6) Adjust the timescale as appropriate (usually "Range of Data")

7) Print/Save a pdf of the view (8.5x11 format, portrait), using the following filename convention: `Gantt_Milestones_Missed_PMB_Mmmyy.pdf`
(Note: 90% scaling with 0.3" margins will allow milestones to fit on one pdf page.)

8) Close the view.

Last Month's Baseline

1) Load the "Last Month" baseline as Baseline 1

2) Open the following view: `NOVA_BARVW_31`

3) Apply the following temp filter: `Milestones = [BOOL.T] & ESDATE >= {5/1/07}`

4) Verify that the appropriate subsectioning and sorting is being applied to the view. (i.e. subsection on WBS L2, with a pagebreak at each L2, sort by baseline finish date)

5) Edit the title block information to correspond to the baseline being displayed, the progress month, etc.

6) Adjust the timescale as appropriate

7) Print/Save a pdf of the view (8.5x11 format, landscape), using the following filename convention: `Gantt_Milestones_LastMonth_Mmmyy.pdf`

8) Close the view.

Posting to DocDB

1) Post the following files to Docdb # 2844

   a. `Gantt_L2_Details_Mmmyy.zip`

   b. `Gantt_AllWBS_WithBudgetInfo_PMB_Mmmyy.pdf`

   c. `BudgetandContingency_L2_Rollup_Mmmyy.pdf`

   d. `BudgetandContingency_L2_Details_Mmmyy.zip`

   e. `Gantt_Milestones_PMB_Mmmyy.pdf`

   f. `MilestonesForMonthlyReport_Mmmyy.pdf`

   g. `L0-L4_MilestoneGantt_Mmmyy_Format 2.pdf`

   h. `L1-L2_MilestoneGantt_Mmmyy_Format 3.pdf`

   i. `Gantt_Milestones_LastMonth_Mmmyy.pdf`

   j. `Gantt_Milestones_Missed_PMB_Mmmyy.pdf`