



Project Office Procedures for Processing Open Plan Baseline Change Requests

Setting Up and Entering Changes

- 1) Review the change request form and validate the information contained in it. Discuss the contents of the form and any supplementary information with the requestor, as needed. Consult with the Project Manager to get initial approval to proceed with processing the change.
- 2) Create a new subfolder with the name "CRnnn" (e.g. "CR046") in the following folder:
\\ppdserver\Neutrino.PPD\Project\Nova\Schedule\Change_Requests

Use the number assigned to the CR on the request form.
- 3) Determine if any new tasks will need to be created in Open Plan. For each new task, determine the following:
 - a. Activity ID (inspect current schedule for appropriate/available IDs)
 - b. Original duration
 - c. Resource assignment(s) (types and levels)
 - d. Predecessor and successor relationship(s)
 - e. Chargeable task code assignment
 - f. Control account assignment
 - g. PMT code (and units required if using PMT code D (units complete method))
 - h. Fund source code
 - i. Responsible institution
 - j. Material and labor contingency percentages
- 4) For existing tasks that require modification, determine if any are already in progress.
 - a. For each existing task not yet in progress, determine the task information that requires modification (e.g. original duration, resource assignments/levels, relationships, etc.)
 - b. For tasks already in progress, determine whether the existing task should be declared complete and a new task created for the remaining effort, or the remaining effort should be modified on the existing in-progress task.
- 5) Launch Open Plan and make a backup of the NOVA_Project file. (backup is optional, depending on complexity of the changes.)
- 6) Open the NOVA_PROJECT file in exclusive mode.
- 7) Go to the project Properties menu item, and select the NOVA_PMB baseline as Baseline 1, if it is not already selected.
- 8) Open the following spreadsheet view: NOVA_SPRDSHT_200
and the following barchart view: NOVA_BARVW_Simple_2.
- 9) Verify that outlining is enabled for both views.

- 10) Apply the relevant subproject filter or create and apply an appropriate temporary filter to both views to show the section(s) of the schedule that will be involved with the change.
- 11) Expand the outline to show all (filtered) tasks in the views.
- 12) Create/insert each new task into its appropriate section of the schedule.
 - a. Enter all the required information that was determined in step (3) for each task.
 - b. Enter a reference to the CR into the "Change Request" activity field to tag each new task for filtering purposes. Format the entry as [CRnnn].
 - c. Enter appropriate text into the "Change Log" notes for each task. This should include the date of the change, a reference to the CR number, and a summary of the changes made such as task durations, resource assignments/levels, etc.
- 13) For existing tasks that are not yet in progress:
 - a. Modify the task information as determined in step (4a).
 - b. If an existing task is no longer required, do not delete it from the schedule. Rather, set the levels of each resource assigned to the task to zero, modify the task description to include the word "obsolete" and adjust/eliminate the task's relationships to other tasks, and/ or target dates, as appropriate. Set the task duration to 1d, if desired.
 - c. Enter/append a reference to the CR into the "Change Request" activity field to tag each modified task for filtering purposes. Format the entry as [CRnnn].
 - d. Enter/append appropriate text into the "Change Log" notes for each task. This should include the date of the change, a reference to the CR number, and a summary of the changes made such as "before" and "after" task durations, resource assignments/levels, etc.
- 14) For existing tasks that are already in progress:
 - a. Modify the task information as determined in step (4b).
 - b. Enter a reference to the CR into the "Change Request" activity field to tag each modified task for filtering purposes. Format the entry as [CRnnn].
 - c. Add appropriate text into the "Change Log" notes for each task. This should include the date of the change, a reference to the CR number, and a summary of the changes made such as "before" and "after" task durations, resource assignments/levels, etc.
 - d. If an in-progress task is to be closed prior to updating its baseline, then provide an actual finish date equal to "Time Now" and mark the task as 100% complete. If it is to remain open and its remaining resource quantities and/or duration are to be modified prior to updating its baseline then do so.
- 15) Modify the definition of the filter called "Change Request" to refer to the CR being processed (See Figure 1 for snapshot of the filter definition dialog box.)
- 16) Make NOVA_SPRDSHT_200 the active view and apply the Change Request filter to it. Then enable subsections for the view and verify that the view is subsectioned by Control Account and Chargeable Task Code at the desired level. (See Figure 2 for a screen shot of the subsection definition.) Ensure that Headings, Summary, and Grand Totals are all

enabled for the subsectioned view. Verify that all the tasks intended to be part of the CR are shown and none that are not part of the CR are shown.

- 17) Perform time analysis and inspect the results. Make adjustments/corrections and re-run, if necessary.

Updating PMB baseline

- 1) Perform Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation ENABLED. Then run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents"
- 2) Note the total VAC as the preliminary estimate of the cost impact of the change and mark it down for inclusion on the docdb CR form. Review/discuss with the project manager, if necessary, before proceeding further.
- 3) Modify the title block for the view to include the CR number, the baseline name and the fact that the view was created BEFORE the baseline was updated to reflect the changes.
- 4) Print/Save a pdf of the view in 11x17 landscape format in the CRnnn folder created in step 1. Use the following filename convention:

[Budget and Contingency Before Baseline Update](#) (cont'd on next line)
[CR056_Nova_PMB_AY_Dollars_After EAC Update.pdf](#)

A sample "Before" PDF is shown in Figure 4

- 5) Repeat Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation DISABLED. Then again run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents".
- 6) Update the PMB baseline using the settings in Figure 3. Make sure the "Change Request" filter is applied for the update. If no "In Progress" or "Complete" activities are involved in the Update, uncheck those option boxes. Select the "Rollup to Baseline Parents" option.
- 7) Repeat Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation ENABLED. Then run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents"
- 8) Verify that the VAC total is now zero. Modify the title block to reflect that the view was created AFTER the baseline update. (See Figure 5 example.)
- 9) Print/Save a pdf of the view in 11x17 landscape format in the CRnnn folder created in step 1. Use the following filename convention:

[Budget and Contingency After Baseline Update](#) (cont'd on next line)
[CR056_Nova_PMB_AY_Dollars_After EAC Update.pdf](#)

A sample "After" PDF is shown in Figure 5.

Updating OBL baseline

- 1) Load the baseline called "Ken_OBL" as Baseline 1.

- 2) For each M&S resource assignment on tasks that are part of the change request, change the PERIOD for the M&S assignment to 1d.
- 3) Perform Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation ENABLED. Then run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents"
- 4) Note the total VAC. This may or may not differ from the PMB value due to the different spread of the M&S resources, if some tasks cross fiscal year boundaries. Modify the title block for the view to include the CR number, the baseline name and the fact that the view was created BEFORE the baseline was updated to reflect the changes.
- 5) Print/Save a pdf of the view in 11x17 landscape format in the CRnnn folder created in step 1. Use the following filename convention:

[Budget and Contingency Before Baseline Update](#) (cont'd on next line)
[CR056_Ken_OBL_AY_Dollars_After EAC Update.pdf](#)

- 6) Repeat Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation DISABLED. Then again run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents".
- 7) Update the Ken_OBL baseline using the settings in Figure 3 (with KEN_OBL baseline selected rather than NOVA_PMB). Make sure the "Change Request" filter is applied for the update. If no "In Progress" or "Complete" activities are involved in the Update, uncheck those option boxes. Select the "Rollup to Baseline Parents" option.
- 8) Repeat Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation ENABLED. Then run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents"
- 9) Verify that the VAC total is now zero. Modify the title block to reflect that the view was created AFTER the baseline update.
- 10) Print/Save a pdf of the view in 11x17 landscape format in the CRnnn folder created in step 1. Use the following filename convention:

[Budget and Contingency After Baseline Update](#) (cont'd on next line)
[CR056_Ken_OBL_AY_Dollars_After EAC Update.pdf](#)

- 11) Reset the PERIOD values for each M&S resource assignment in the change request from 1d back to 0.

Saving the Updated Schedule

- 1) Load the baseline called "Nova_PMB" as Baseline 1.
- 2) Repeat Cost Calculations for Budget, Remaining, Actual and Earned Value, with resource cost escalation DISABLED. Then again run the batch global edit called "UpdateContDollars", followed by the rollup called "RollupContingencyDollars", followed by the batch global edit called "UpdateContPercents".
- 3) Save the Nova_Project file.

- 4) Create and save a NEW baseline with the name "CRnnn", where nnn is the change request number. Use the ChangeRequest filter when creating the new baseline so that it contains only those tasks involved in the change request.
- 5) Resave and close the NOVA_PROJECT file
- 6) Print paper copies of the four Before vs After PDFs and file them. Also post/add copies of the PDFs to the associated CR document in Nova DocDB.
- 7) Notify the project financial officer via e-mail that the change has been made and the new CR baseline exists in Open Plan, so that the changes can be loaded into Cobra.

Figures

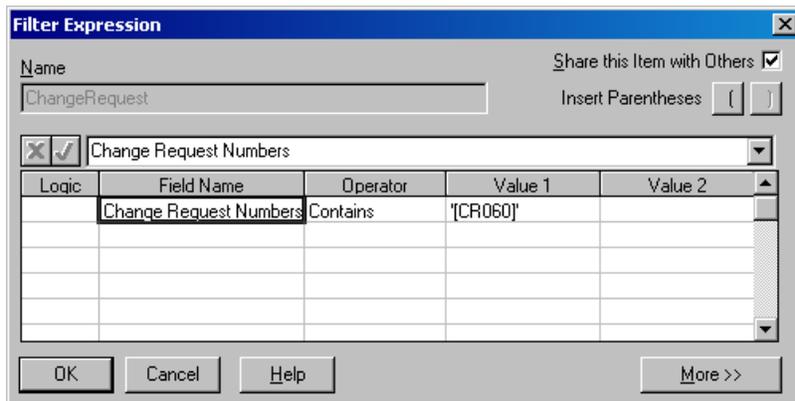


Figure 1 - Screen Shot of CR Filter Definition

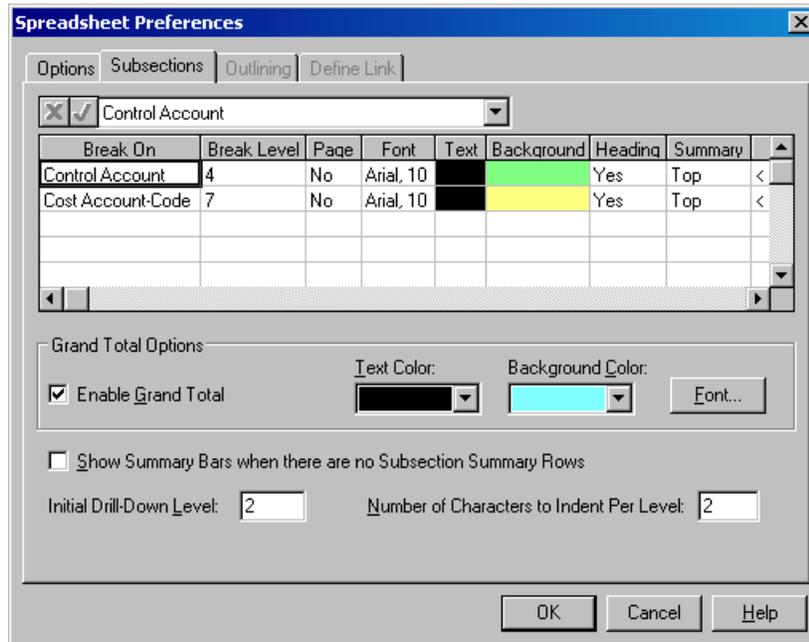


Figure 2 - Screenshot of Subsection Definition

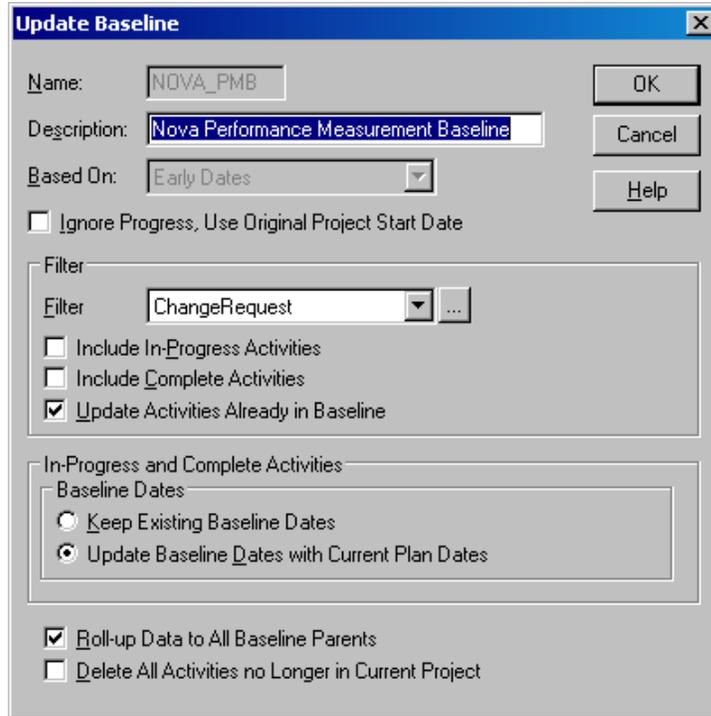


Figure 3 - Example screenshot of baseline update dialog box. Note: checked options may differ depending on tasks involved in a particular change request.



Nova Project
WBS 2.0.2.2
 Subsection by Control and Cost Account
 Change Request [CR000]

AY Dollars
 Baseline: Nova_PMB

Activity ID	Activity Description	Change Request Numbers	Computed Status	Orig. Dur.	Early Dates	Baseline Dates	Cost Account	Control Account	Control Resp. Inst. Type	Fund Source	Units To Do	BAC Material	BAC Labor	BACcum	MBSS Cont. %	MBSS Cont. \$	Labor Cont. %	Labor Cont. \$	EAC	VAC
2.0.2.2.1.1	MI RF Cavities Fabrication of Modulators Complete	[CR000]	Planned	0	10Jun10 10Jun10	30Sep09 30Sep09	2.0.2.2	2.0.2.2			0	\$551,760	\$219,740	\$771,500	180%	\$132,495	320%	\$43,948	\$795,711	(\$24,212)
2.0.2.2.1.1.1	Prep Rec & Award PO for Parts for Series Tube Modulators	[CR036][CR060]	Planned	20d	06Oct09 02Nov09	02Feb09 27Feb09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$0	\$4,347	\$4,347	0%	\$0	20%	\$690	\$4,655	(\$209)
2.0.2.2.1.1.2	Receive Parts for Series Tube Modulators	[CR036][CR060]	Planned	80d	03Nov09 03Mar10	02Mar09 23Jun09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$254,100	\$3,622	\$257,622	25%	\$63,626	20%	\$704	\$254,091	(\$6,469)
2.0.2.2.1.1.3	Assemble Series Tube Modulators	[CR036][CR060]	Planned	60d	04Mar10 20May10	23Jun09 18Sep09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$30,250	\$81,143	\$111,393	20%	\$6,050	20%	\$16,229	\$116,032	(\$4,639)
2.0.2.2.1.1.4	Electrical Testing of Completed Series Tube Modulators	[CR036][CR060]	Planned	10d	27May10 10Jun10	17Sep09 30Sep09	2.0.2.2.2	2.0.2.2	FINAL	F DA	0	\$0	\$2,182	\$2,182	0%	\$0	20%	\$437	\$2,287	(\$105)
2.0.2.2.1.2.1	Prep Rec & Award PO for Parts for MI RF Cavities Power Amplifier	[CR036][CR060]	Planned	20d	06Oct09 02Nov09	02Feb09 27Feb09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$0	\$7,792	\$7,792	0%	\$0	20%	\$1,656	\$8,165	(\$373)
2.0.2.2.1.2.2	Receive Parts for MI RF Cavities Power Amplifier	[CR036][CR060]	Planned	80d	03Nov09 03Mar10	02Mar09 23Jun09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$133,100	\$6,496	\$139,596	25%	\$33,276	20%	\$1,200	\$143,208	(\$3,611)
2.0.2.2.1.2.3	Assembly of MI RF Cavities Power Amplifier	[CR036][CR060]	Planned	40d	04Mar10 29Apr10	23Jun09 18Aug09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$7,290	\$46,871	\$54,131	25%	\$1,815	20%	\$0,274	\$56,568	(\$2,426)
2.0.2.2.1.2.4	Electrical Testing of Completed MI RF Cavities Power Amplifier	[CR036][CR060]	Planned	10d	29Apr10 12May10	19Aug09 01Sep09	2.0.2.2.2	2.0.2.2	FINAL	F DA	0	\$0	\$2,182	\$2,182	0%	\$0	20%	\$437	\$2,287	(\$105)
2.0.2.2.1.3.1	MI RF Cavity Prep Rec & Award PO for Parts for Control Rack	[CR036][CR060]	Planned	20d	06Oct09 02Nov09	02Feb09 27Feb09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$0	\$3,435	\$3,435	0%	\$0	20%	\$87	\$3,659	(\$165)
2.0.2.2.1.3.2	Receive Parts for MI RF Cavity Control Rack	[CR036][CR060]	Planned	80d	03Nov09 03Mar10	02Mar09 23Jun09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$48,400	\$1,487	\$49,887	25%	\$12,100	20%	\$297	\$51,158	(\$1,271)
2.0.2.2.1.3.3	MI RF Cavity Assemble Control Rack	[CR036][CR060]	Planned	40d	04Mar10 29Apr10	23Jun09 18Aug09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$6,090	\$25,046	\$31,096	20%	\$1,210	20%	\$5,000	\$32,446	(\$1,350)
2.0.2.2.1.3.4	MI RF Cavity Electrical Testing of Completed Control Rack	[CR036][CR060]	Planned	10d	29Apr10 12May10	19Aug09 01Sep09	2.0.2.2.2	2.0.2.2	FINAL	F DA	0	\$0	\$2,182	\$2,182	0%	\$0	20%	\$437	\$2,287	(\$105)
2.0.2.2.1.4.1	Prep Rec & Award PO for Parts for MI RF Cavities Solid State Amplifiers	[CR036][CR060]	Planned	20d	06Oct09 02Nov09	02Feb09 27Feb09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$0	\$4,347	\$4,347	0%	\$0	20%	\$690	\$4,655	(\$209)
2.0.2.2.1.4.2	Receive Parts for MI RF Cavities Solid State Amplifiers	[CR036][CR060]	Planned	80d	03Nov09 03Mar10	02Mar09 23Jun09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$48,400	\$1,487	\$49,887	20%	\$9,060	20%	\$207	\$51,158	(\$1,271)
2.0.2.2.1.4.3	Assemble MI RF Cavities Solid State Amplifiers	[CR036][CR060]	Planned	50d	04Mar10 12May10	23Jun09 01Sep09	2.0.2.2.2	2.0.2.2	FINAL	C DA	0	\$24,200	\$25,046	\$49,246	20%	\$4,940	20%	\$5,000	\$51,046	(\$1,800)
2.0.2.2.1.4.4	Electrical Testing of Completed MI RF Cavities Solid State Amplifiers	[CR036][CR060]	Planned	10d	12May10 28May10	02Sep09 18Sep09	2.0.2.2.2	2.0.2.2	FINAL	F DA	0	\$0	\$2,182	\$2,182	0%	\$0	20%	\$437	\$2,287	(\$105)
											0	\$651,760	\$219,740	\$771,500	180%	\$132,495	320%	\$43,948	\$795,711	(\$24,212)

Figure 4 - CR Spreadsheet BEFORE Nova_PMB Baseline Update

Nova Project															AY Dollars								
WBS 2.0.2.2															Baseline: Nova_PMB								
Subsection by Control and Cost Account																							
Change Request [CR000]																							
After PMB correction to Baseline Update after EAC changes																							
Activity ID	Activity Description	Change Request Numbers	Computed Status	Orig. Dur	Evly Dates	Baseline Dates	Cost Account	Control Account	Resp. Inst. Type	PMT Type	Fund Source	Units To Bc	BAC Material	BAC Labor	BACcum	M&S Cont. %	M&S Cont. \$	Labor Cont. %	Labor Cont. \$	EAC	VAC		
2.0.2.2 - MI RF Cavities																							
2.0.2.2.3	MI RF Cavities Fabrication of Modulators Complete	[CR000]	Planned	0	10Jun10 10Jun10	10Jun10 10Jun10	2.0.2.2	2.0.2.2				0	\$565,440	\$230,271	\$795,711	180%	\$135,790	323%	\$46,054	\$795,711	\$0		
2.0.2.2.1 - MI RF Cavities Equip. Gallery Install/Modification																							
2.0.2.2.1.1	Prep Req & Award PO for Parts for Series Tube Modulators	[CR036][CR000]	Planned	20d	06Oct09 02Nov09	06Oct09 02Nov09	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$0	\$4,565	\$4,565	0%	\$0	20%	\$911	\$4,565	\$0		
2.0.2.2.1.2	Receive Parts for Series Tube Modulators	[CR036][CR000]	Planned	80d	03Nov09 03Mar10	03Nov09 03Mar10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$260,400	\$3,691	\$264,091	25%	\$95,100	20%	\$739	\$264,091	\$0		
2.0.2.2.1.3	Assemble Series Tube Modulators	[CR036][CR000]	Planned	60d	04Mar10 28May10	04Mar10 28May10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$31,000	\$85,032	\$116,032	20%	\$6,300	20%	\$17,000	\$116,032	\$0		
2.0.2.2.1.4	Electrical Testing of Completed Series Tube Modulators	[CR036][CR000]	Planned	10d	27May10 10Jun10	27May10 10Jun10	2.0.2.2	2.0.2.2	FINAL	F	DA	0	\$0	\$2,287	\$2,287	0%	\$0	20%	\$467	\$2,287	\$0		
2.0.2.2.1.2.1	Parts Req & Award PO for Parts for MI RF Cavities Power Amplifier	[CR036][CR000]	Planned	20d	06Oct09 02Nov09	06Oct09 02Nov09	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$0	\$8,155	\$8,155	0%	\$0	20%	\$1,631	\$8,155	\$0		
2.0.2.2.1.2.2	Receive Parts for MI RF Cavities Power Amplifier	[CR036][CR000]	Planned	80d	03Nov09 03Mar10	03Nov09 03Mar10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$135,400	\$5,808	\$143,208	25%	\$34,100	20%	\$1,302	\$143,208	\$0		
2.0.2.2.1.2.3	Assembly of MI RF Cavities Power Amplifier	[CR036][CR000]	Planned	40d	04Mar10 28Apr10	04Mar10 28Apr10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$7,440	\$45,118	\$55,558	25%	\$1,820	20%	\$5,254	\$55,558	\$0		
2.0.2.2.1.2.4	Electrical Testing of Completed MI RF Cavities Power Amplifier	[CR036][CR000]	Planned	10d	28Apr10 12May10	28Apr10 12May10	2.0.2.2	2.0.2.2	FINAL	F	DA	0	\$0	\$2,287	\$2,287	0%	\$0	20%	\$467	\$2,287	\$0		
2.0.2.2.1.3.1	MI RF Cavity Prep Req & Award PO for Parts for Control Rack	[CR036][CR000]	Planned	20d	06Oct09 02Nov09	06Oct09 02Nov09	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$0	\$3,599	\$3,599	0%	\$0	20%	\$720	\$3,599	\$0		
2.0.2.2.1.3.2	MI RF Cavity Receive Parts for Control Rack	[CR036][CR000]	Planned	80d	03Nov09 03Mar10	03Nov09 03Mar10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$48,690	\$1,588	\$51,158	25%	\$12,400	20%	\$312	\$51,158	\$0		
2.0.2.2.1.3.3	MI RF Cavity Assemble Control Rack	[CR036][CR000]	Planned	40d	04Mar10 28Apr10	04Mar10 28Apr10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$6,200	\$25,246	\$32,446	20%	\$1,240	20%	\$5,246	\$32,446	\$0		
2.0.2.2.1.3.4	MI RF Cavity Electrical Testing of Compressed Control Rack	[CR036][CR000]	Planned	10d	28Apr10 12May10	28Apr10 12May10	2.0.2.2	2.0.2.2	FINAL	F	DA	0	\$0	\$2,287	\$2,287	0%	\$0	20%	\$467	\$2,287	\$0		
2.0.2.2.1.4.1	Parts Req & Award PO for Parts for MI RF Cavities Solid State Amplifiers	[CR036][CR000]	Planned	20d	06Oct09 02Nov09	06Oct09 02Nov09	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$0	\$4,565	\$4,565	0%	\$0	20%	\$911	\$4,565	\$0		
2.0.2.2.1.4.2	Receive Parts for MI RF Cavities Solid State Amplifiers	[CR036][CR000]	Planned	80d	03Nov09 03Mar10	03Nov09 03Mar10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$48,690	\$1,588	\$51,158	20%	\$9,920	20%	\$312	\$51,158	\$0		
2.0.2.2.1.4.3	Assemble MI RF Cavities Solid State Amplifiers	[CR036][CR000]	Planned	60d	04Mar10 12May10	04Mar10 12May10	2.0.2.2	2.0.2.2	FINAL	C	DA	0	\$24,800	\$26,246	\$51,046	20%	\$4,920	20%	\$5,246	\$51,046	\$0		
2.0.2.2.1.4.4	Electrical Testing of Completed MI RF Cavities Solid State Amplifiers	[CR036][CR000]	Planned	10d	13May10 28May10	13May10 28May10	2.0.2.2	2.0.2.2	FINAL	F	DA	0	\$0	\$2,287	\$2,287	0%	\$0	20%	\$467	\$2,287	\$0		
															\$565,440	\$230,271	\$795,711	180%	\$135,790	323%	\$46,054	\$795,711	\$0

Figure 5 - CR Spreadsheet AFTER Nova_PMB Baseline Update