Inland Revenue
Te Tari Taake

Business Transformation

Inland Revenue

Business Transformation Programme

Standards for Schedule Construction and Maintenance

Senior Responsible Owner:

Prepared by: PMO
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About this Document

This document sets out the standards, naming conventions and maintenance procedures to be used by all those creating and maintaining schedules for the BT Programme.

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Formal Review Area	Name	Signature	Date
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1 Introduction

1.1 About these guidelines

The Standards for Schedule Construction and Maintenance Guidelines provide guidance and standards for experienced people completing project plan activities.

For people new to project planning, project planning training is recommended to help build the required competencies in this area.

Schedule management is critical to managing delivery across the workstreams within the Programme. It is the aim of the following schedule management process to establish a clear and defined scheduling process for monitoring key milestones and deliverables across the Programme. Specifically, the process aims to:

- prepare all schedules in the same format with appropriate interdependencies, linkages and logic
- accurately report schedule information to all relevant stakeholders
- ensure schedules aid the delivery of Executive-level reports and Business Transformation Programme direction to the Management Team
- minimise the requirements for manual entry to management reporting on a weekly basis
- ensure activities and deliverables drive the related dependencies throughout the Business Transformation Programme, and
- anticipate, discover and report any milestone changes due to schedule movement from the baseline in a timely manner
- present the critical path.

1.2 Overview of Scheduling Principles

Level of detail

- The schedules will track Deliverables and Activities
- Will be scheduled down to WBS level 6 or 7
- Schedules will be based on real and timely information.

Work Effort

- Work effort will be tracked against activities
- Work effort will not be driven from top down
- Schedules will include time and work estimates that are based on reliable and benchmarked estimates for the same or similar activities.

Resource Allocation

- Role based resource allocation is available to use in schedules.

Fixed date vs. Floating tasks

- The practice of managing the dates associated with scheduled tasks will be via allocation of work effort and duration.

Milestones

- Milestones will be clearly outlined at the top of each workstream schedule
- Tasks within the schedule that must be 100% for the milestone to be met.

Dependencies

- Dependencies will be clearly outlined at the top of each workstream schedule
- The schedule will track the dates and movement of dates associated with dependencies
- Schedules will reflect the interdependencies between activities within the programme, and between the programme and other projects and initiatives
- Dependencies will also be managed and tracked in JIRA.

Schedule Performance (SP)

- SP for workstream schedules will take into account all tasks (activities and deliverables) and will be based on % complete and the budget (planned effort) for a task
- SP will be reported on completed and partially completed tasks based on the value of the task % complete.

Critical Path

- The critical path will be tracked and reported as an 'informed' critical path.

Linking of workstream schedules

- There will be no direct linkages between workstream schedules.

Integrated schedule

- The integrated schedule will be developed via a roll-up from workstream (child) schedules.

2 Roles and Responsibilities

2.1 PMO

The PMO is responsible for:

- mandating and documenting the standards to be used for constructing and maintaining all workstream schedules
- creating the integrated schedule based on the workstream schedules
- with coordinators and leads, facilitating shared understanding and agreement of identified dependencies, and accurately reflecting these in the integrated plan
- with coordinators and leads, maintaining internal dependency links
- with coordinators and leads, maintaining external dependency information
- baseline workstream schedules
- baseline the integrated schedule
- facilitating regular review of the integrated plan with the coordinator team
- reporting from the integrated schedule on overdue activities, critical path and critical dependencies weekly
- providing support, advice and guidance to coordinators on scheduling as required
- publishing the weekly Schedule Performance dashboard to the Programme Planning SharePoint site.

2.2 Workstream Leads / Project Managers

Workstream Leads / Project Managers are accountable for:

- the content of their workstream's schedules, including agreeing to the baseline delivery dates
- agreeing cross-workstream dependencies with their peers and recording these in the dependency register (JIRA)

- identifying external dependencies and recording these in the dependency register (JIRA)
- complying with standards and ensuring that the plan is updated weekly (Midday Thursday) so that they can be fed into the Workstream reporting
- the change control process within the workstream, ensuring that early visibility is given when a need for the schedule to materially change is identified.

2.3 Project Coordinators

Coordinators are responsible for:

- assisting the leads / project managers, build the schedules with their input and to the documented standards
- maintaining the information in the project schedules as per the documented standards, including ensuring that progress against planned activities is updated weekly by 12.00pm every Thursday
- identifying cross-workstream dependencies and recording these in the dependency register (JIRA)
- identifying external dependencies and recording these in the dependency register (JIRA)
- scheduling regular planning meetings to validate the accuracy and currency of the plan information.

3 Project Schedule

3.1 What is a project schedule?

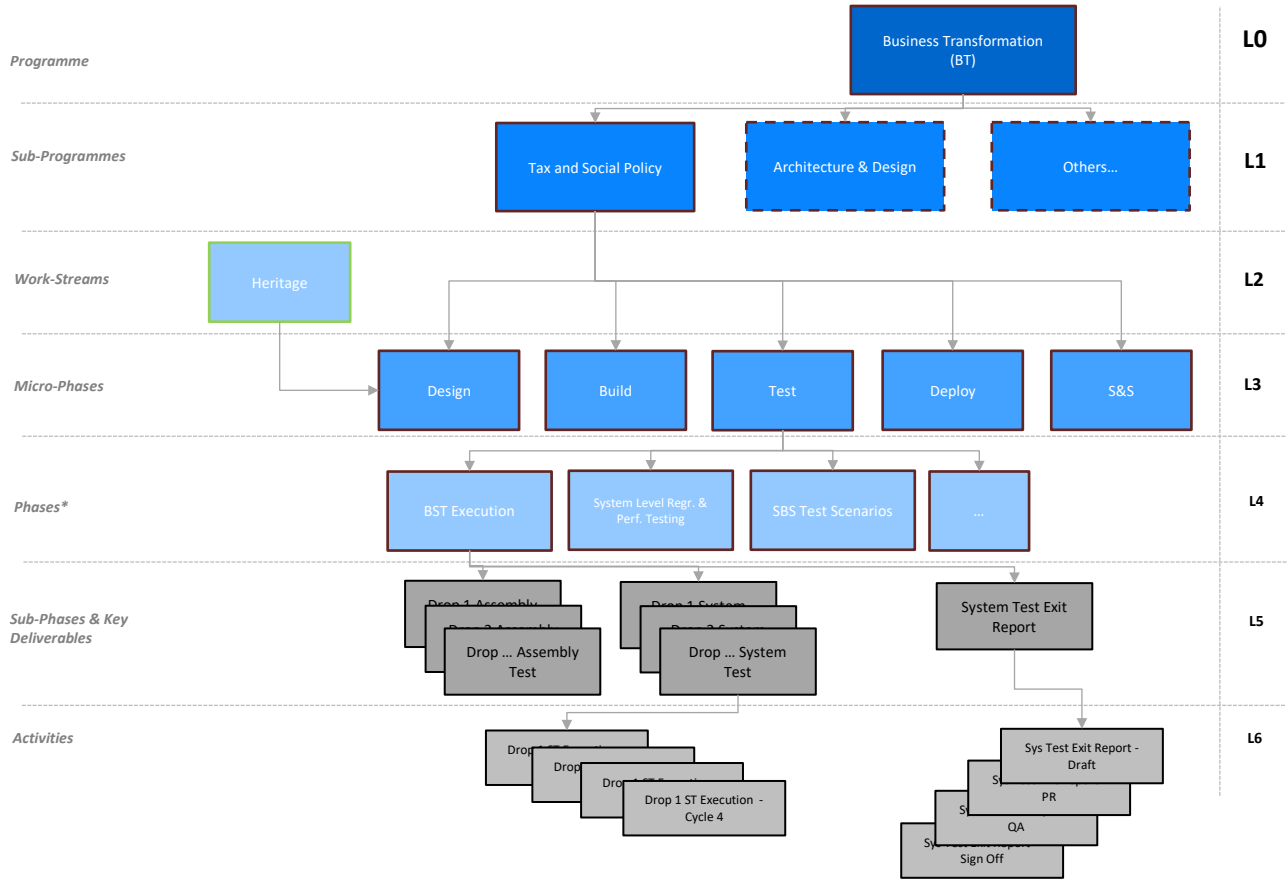
The project schedule is the project plan expressed in time. It documents what tasks need to be done, how long each task will take, when to start and complete each task and who will do the task.

A project schedule is the key project tool used to manage *actual* versus *planned* project performance in the following areas:

- time
- progress
- dependencies.

3.2 Work Breakdown Structure (WBS)

Each schedule will be set up using a similar structure. Doing this allows the PMO to maintain consistency across each workstream plan and allow a roll up to the Integrated Schedule. It is recommended to have no more than six levels of WBS.



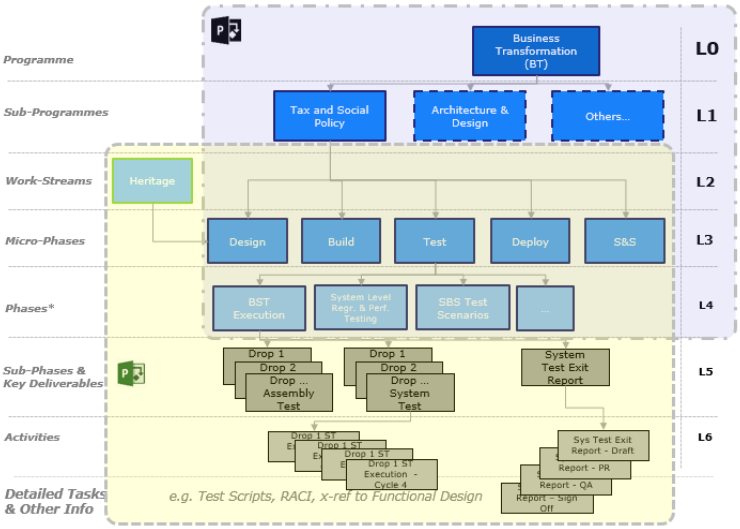
Here is an example of what a WBS might look like in a schedule:

	Outl Lev		Block Plan	Status	DEL ID	% Comple	Task Name	Duration	Work	Start	Finish
1	**1**		**No**	**Late**		**0%**	**RX <Workstream Name>**	**1 day?**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
2	**2**		**No**	**Late**		**0%**	**Key Release Milestones**	**0 days**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
3	3		No	Late		0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
4	**2**		**No**	**Late**		**0%**	**Enterprise Release Plan Milestones**	**0 days**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
5	3		No	Late		0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
6	**2**		**No**	**Late**		**0%**	**Key Milestones**	**0 days**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
7	3		No	Late	MIL	0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
8	**2**		**No**	**Late**		**0%**	**Dependencies**	**0 days**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
9	3		No	Late	BTD-xxx	0%	BTD-xxx - <Dependency Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
10	**2**		**No**	**Late**		**0%**	**Deliverables**	**0 days**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
11	3		No	Late	Dxxxx	0%	Dxxxx - <Deliverable Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
12	**2**		**No**	**Late**		**0%**	**Design**	**1 day?**	**0 hrs**	**Mon 1/10/18**	**Mon 1/10/18**
13	3		No	Late		0%	Business System Test Prep	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18

3.3 Integrated Schedule

The integrated schedule is a rolled-up view of the workstream schedules from level 2 to level 5 and will be used to inform the high-level programme plan.

Integrated schedule and workstream relationship:



BT Programme Master Schedule (MPP):
- Highest level of tracking/reporting (L1->L4) mainly targeting BT Leaders
- L4 here matches with *BT Core Release Baseline 6.0 – High Level Programme Plan* bar diagram
- L2 view by Workstream is not available here
- Broken-down till L4-Phases –> automated integration point with Work-Stream Schedule via MS Project Online
- Enables roll-up of key data (e.g. EV, % complete) Work-Streams, Macro-Phases and Phases

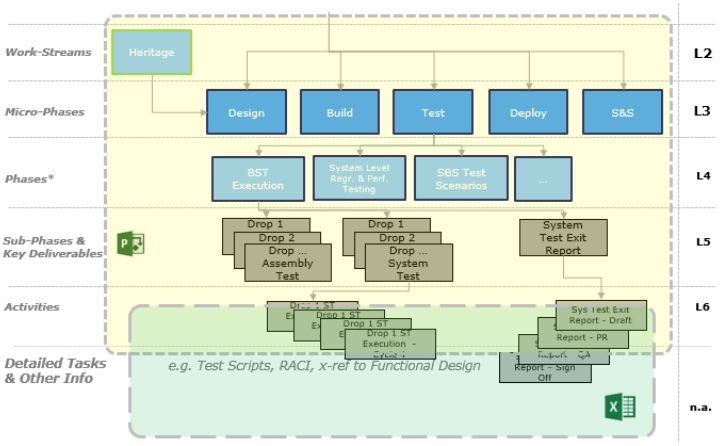
Work-Stream Schedule (MPP):
- Mid-level tracking/reporting (L4->L6) for PgMs/PMs
- L2 here just defines Work-Stream (ie Ownership)
- L3-Phases is the integration point with the above Master Schedule via MS Project
- L5 reports macro-activities (e.g. System Test – Drop 1) per each Sub-Phase
- L6 reports key activities and deliverables; key metrics (EV, %) and updates (start date, end date,..) are defined at this level
- Enables roll-up of EV, % completion and resource team allocation at Work-Stream level

3.4 Operational Trackers

A workstream tracks a summary of its work using MS Project but the lowest level of detail may be tracked in an operational tracker such as Excel. In this scenario, it is expected that the MS Project schedule will have summary tasks that aggregate the detailed tasks in the operational tracker.

Tracking Progress

Detailed progress would be tracked in the operational tracker. The progress completed (as a percentage complete) would be entered into MS Project against the appropriate task. The EV calculation occurs against the progress marked in MS Project schedule.



Operational Tracker (Excel or equivalent) – OPTIONAL:
- Lowest level of tracking/reporting (< L6) for Team Leads to frequently monitor delivery tasks
- Customised and owned by Team Leads for their operational needs and context
- L6 is the manual integration point with Workstream Schedule (i.e. TLs will have to roll-up info in XLS tools and manually update MS Project schedule at Lv.6)
- Includes any other additional useful information (such as x-ref to Design docs, detailed RACI, detailed resource plan, # of scripts,..)

3.5 Developing a project schedule

There are various ways you can approach developing a project schedule, however each project will need to address the following questions or steps:

3.5.1 Naming conventions

The Deliverable Name must be as it appears in the Deliverable Register maintained by the PMO, 'Dxxxx Deliverable Name', where *xxxx* is the D-number assigned, and, to ensure traceability and consistency across all programme artefacts.

The summary task names for levels 1 to 3 should not be changed as these are used when rolling up to the integrated schedule.

3.5.2 Calendars

The schedule template will be pre-populated with the relevant public holidays, please see the Programme Planner if you need to modify the calendar for your workstream as this will need to be reflected in the integrated schedule.

Schedules will use the Enterprise Calendar, "NZ Standard", (Project Calendar) as this has the public holidays loaded.

Consider using elapsed duration (suffix 'ed') in the duration column for continuous tasks, this will ignore the enterprise calendar.

Leave for individual resources should not be tracked in the workstream schedules.

3.5.3 Constraints

Constraints should not be used as a way to drive task dates.

The only time that this is acceptable is when there is no logical predecessor to drive the task.

Note: Manually entering a Start or Finish date or dragging and dropping a Gantt bar will create a constraint.

3.5.4 Schedule template

A schedule template will be provided to give workstreams a base structure to work from. This will include a WBS and the enterprise calendar showing public holidays.

3.5.5 Summary tasks

Summary tasks should not have links or resources.

3.5.6 Task name

Task names need to be descriptive. All detailed level tasks should contain a verb to define a concrete action. You will need to ensure that each task has a unique name (eg, use prefixes) and special characters should not be used in the task name.

Every task name needs to make sense when read in isolation of its parent task but shouldn't include too much information in the task name. Use the Notes function to record additional details if necessary.

The lowest level tasks are the only ones with work, resources, duration etc assigned to them.

3.5.7 Task type

Task types apply only to automatically-scheduled tasks, and come in three flavours: fixed units, fixed work, and fixed duration. Project looks at a task's type to determine how duration, work, and units will behave as Project schedules your project.

Task Types:

- **Fixed Units**: This setting assumes the number of people assigned to the task (units) is known and you don't want it to change, even if duration changes. When the work changes on a task, the duration changes, but not the number of people. This task type reflects most task realities in any project.
- **Fixed Work**: This setting assumes work doesn't change, even after changing durations or adding people. Use this setting if you want to control the duration of tasks by adding or removing people.
- **Fixed Duration**: This setting assumes duration doesn't change, even when more people are assigned to the task. Use this setting if you have a duration in mind for a task before you know other information about the task.

Change	Fixed Work Result	Fixed Duration Result	Fixed Units Result
⇧ Duration	⇩ Units*	⇧ Work	⇧ Work
⇩ Duration	⇧ Units*	⇩ Work	⇩ Work
⇧ Work	⇧ Duration	⇧ Units*	⇧ Duration
⇩ Work	⇩ Duration	⇩ Units*	⇩ Duration
⇧ Units	⇩ Duration	⇧ Work	⇧ Duration
⇩ Units	⇧ Duration	⇩ Work	⇩ Duration

* Only if the task has been assigned

3.5.8 Task mode

BT Schedules should be completely Auto Scheduled and driven by logic (predecessors, successors, durations, work).

Auto scheduled tasks

For Auto Scheduled tasks, Project will automatically set basic parameters, such as the duration, a start and finish date. While calculating these, MS Project considers the context and date constraints. The tasks will be recalculated by the Project Scheduling Engine every time something that affects this task in the project schedule changes. Creating tasks in Auto Scheduled mode is recommended for most tasks, because it minimises manual manipulations and can avoid scheduling errors that can occur in complex project environments. Avoid setting dates manually when arranging tasks, as this will apply a constraint and prevent the scheduling engine from doing its magic.

Manually scheduled tasks

This should only be used during the initial planning stages for the schedule and changed to "Auto scheduled" when planning is complete.

If you create a task in manually scheduled mode, no calculations take place. Once set up, project will not move the task when re-calculating the project schedule. When hard parameters are clear you should replace the uncertain values and change the task mode to Auto Scheduled.

Please note: *Project Online has been set to not accept manually scheduled tasks when publishing.*

3.5.9 Task Relationships - Linking

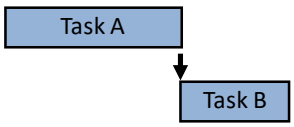
A **dependency** is a logical cause-and-effect relationship between two tasks (ie, one task or activity is dependent upon another task or activity).

Where a task or activity is dependent on another task or activity, a link is to be established between the two. Typically, this will involve setting the completion of one task as a predecessor to the start of another (Finish-Start).

There are **four types** of dependencies:

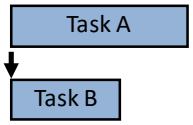
Finish-Start (FS)

The most common type, this means task B cannot start until task A finishes (e.g., test the module after building the module).



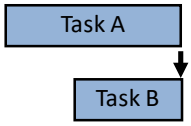
Start-Start (SS)

Task B cannot start until task A starts.



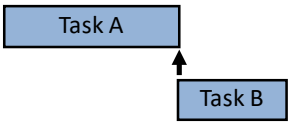
Finish-Finish (FF)

Task B cannot finish until task A finishes.



Start-Finish (SF)

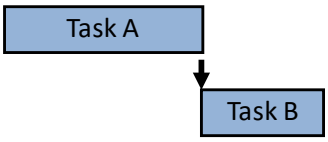
Task B must finish before task A starts.



Dependencies can have a **lag time**:

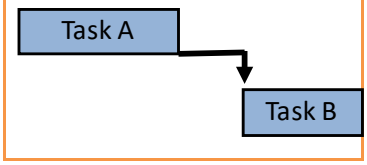
Zero

In a Finish-Start dependency, task B begins immediately after task A.



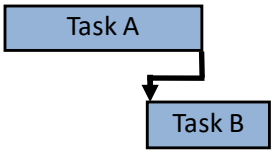
Positive

In a Finish-Start dependency, task B waits a specified number of days after task A finishes.



Negative

In a Finish-Start dependency, task B begins a specified number of days before task A finishes.



Lags can be added to links, for example if there will be a delay between the finish of a predecessor and the start of the successor (such as where a document must be completed a number of days before the approval meeting due to the lead time required for papers to be submitted).

It is sometimes helpful to have the Successor column visible in your schedule so that you can see which tasks and activities will be affected by any changes you make.

	Outl Lev		Block Plan	Status	DEL ID	% Comple	Task Name	Duration	Work	Start	Finish	Predece	Successor
1	1		No	Late		0%	RX <Workstream Name>	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18		
2	2		No	Late		0%	Key Release Milestones	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
3	3		No	Late		0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
4	2		No	Late		0%	Enterprise Release Plan Milestones	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
5	3		No	Late		0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
6	2		No	Late		0%	Key Milestones	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
7	3		No	Late	MIL	0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
8	2		No	Late		0%	Dependencies	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
9	3		No	Late	BTD-xxx	0%	BTD-xxx - <Dependency Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
10	2		No	Late		0%	Deliverables	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
11	3		No	Late	Dxxxx	0%	Dxxxx - <Deliverable Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18		
12	2		No	Late		0%	Design	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18		
13	3		No	Late		0%	Business System Test Prep	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18		
14	3		No	Late		0%	Business Deployment Approach	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18		

If a task does not have a logical dependency with another task, and you do not want it to start on the default (project start date), enter the start date manually. This will add the constraint type "Start No Earlier Than".

3.5.10 Default Columns

There are three columns the PMO uses, these are not to be removed. These have been added so the workstream schedules can be reported on at different levels of detail using filters.

The default columns are as follows:

- Outline Level – displays the WBS level 1 to 6 this is used when rolling up to the integrated plan
- Block Plan – Used to define which items are to be included in the workstream block plan
- DEL ID – used to display the unique deliverable ID BTDxxx or MIL for key milestones

3.6 Task Estimation (How long will it take)

Capture these details to populate the schedule:

- Identify start and finish dates for each task and confirm these dates with the resource responsible for that task.
- Group tasks in the sequence they will be completed. Check every activity is linked to another with its logic relationship.
- Avoid making tasks too granular eg, hourly or too long, ideally tasks should be 1 or 2 days as the minimum and a maximum of one reporting period (10 days).
- Populate the "Work" column with the estimated hours for each task or add roles from the enterprise resource list to calculate the work.

3.7 Baselines

The PMO will be responsible for baselining all the schedules once the project tasks, dependencies and work effort have been entered into the schedule and agreed upon by all stakeholders. Note that all dependencies must be agreed before the schedule can be baselined.

3.7.1 Re-baselining post PCR

The workstream will update the schedule to reflect the changes from an approved PCR and will advise the PMO of the changes in the schedule, the PMO will then re-baseline only the task that were modified or added.

Re-baselining the entire work plan would provide inaccurate metrics.

3.8 Publishing and Saving

When you have finished updating, always publish your schedule by selecting the "Publish" button in MS Project. Do not under any circumstances save the schedule with a new name or version number or in a different location. Always open and update the schedule from Project Online Do not download a copy and update it offline.

4 Managing Dependencies

These guidelines cover the approach to be taken by the Business Transformation Programme with respect to the treatment of schedule dependencies.

The management of dependencies ensures that:

- an effective process exists for managing existing dependencies
- new dependencies can be identified, and an action plan agreed and implemented
- the impact of dependencies on the workstream plans is understood
- there is effective communication between all the dependency-related parties
- there is a clear focus and a clear definition of dependency ownership and management responsibilities
- dependencies are integrated into the workstream plans and schedules, and the Programme master schedule, and clearly identified as dependencies
- dependencies can be included and addressed as an integral part of the Programme monitoring and reporting.

There are three types of dependencies:

1. Workstream level Dependency (Internal Dependency) – These are dependencies that a workstream has on the deliverable owned by another workstream.
2. External to BT Dependencies – These are dependencies that a workstream has with the deliverable owned by a team outside of the BT Programme but internal to IR.
3. External to IR Dependencies – These are dependencies that a workstream has with the deliverable owned by a party external to IR.

Dependencies should be codified in project schedules (Gantt charts) with a DEL ID indicator of "BTD-xxx".

The "owner" of a dependency is the PM / workstream lead whom is supplying the content to the recipient.

When workstream leads / PMs are planning their project they are required to "handshake" the details (from, to, content, date and impact) together and populate the data into the dependency register and their respective schedules.

Refer to the dependencies guide "Dependencies in JIRA" for more information. The dependency register is located in Jira at the following location:
https://jira.nsp.ird.govt.nz/projects/BTD/issues

4.1 Programme Level dependencies

Programme-level dependencies will be documented in the integrated schedule. This includes the baseline set of dependencies identified as part of the current Baseline plan.

Where a dependency meets any of the following criteria, it may be added to the BT programme schedule:

- Change to an existing programme level dependency (eg, date / content)
- Impact to a deliverable on the critical path
- Identification of a new dependency relating to a Priority 1 deliverable; or
- A dependency deemed "critical" to programme success.

Changes to dependencies should be agreed between the respective PM / workstream lead and the BT Programme Manager / Programme Planner. At this point they will be updated in the programme-level dependency register and into the Programme Gantt chart.

4.2 Workstream level dependencies

Dependencies other than those identified by the programme as part of the Baseline plans will be managed by the individual workstream in JIRA, and are the accountability of the respective project manager / workstream lead.

All dependencies must be included in your workstream schedule and in the Dependency Register.

	Ou Le		Block Plan	Status	DEL ID	% Compl	Task Name	Duratio	Work	Start	Finish
1	1		No	Late		0%	RX <Workstream Name>	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18
2	2		No	Late		0%	Key Release Milestones	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
3	3		No	Late		0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
4	2		No	Late		0%	Enterprise Release Plan Milestones	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
5	3		No	Late		0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
6	2		No	Late		0%	Key Milestones	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
7	3		No	Late	MIL	0%	<Milestone Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
8	2		No	Late		0%	Dependencies	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
9	3		No	Late	BTD-xxx	0%	BTD-xxx - <Dependency Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
10	2		No	Late		0%	Deliverables	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
11	3		No	Late	Dxxxx	0%	Dxxxx - <Deliverable Name>	0 days	0 hrs	Mon 1/10/18	Mon 1/10/18
12	2		No	Late		0%	Design	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18
13	3		No	Late		0%	Business System Test Prep	1 day?	0 hrs	Mon 1/10/18	Mon 1/10/18

5 Managing and tracking

When updating your Project schedule please consider the following points:

- Do you need to adjust the task duration to complete the work?
- Do the tasks dates still align with the baseline?
- Have you confirmed the effort (work) for the task?
- Does the schedule conform to the schedule guidelines?
- Does schedule align with reporting requirements?
- Do any timeline impacts need to be captured in a PCR?

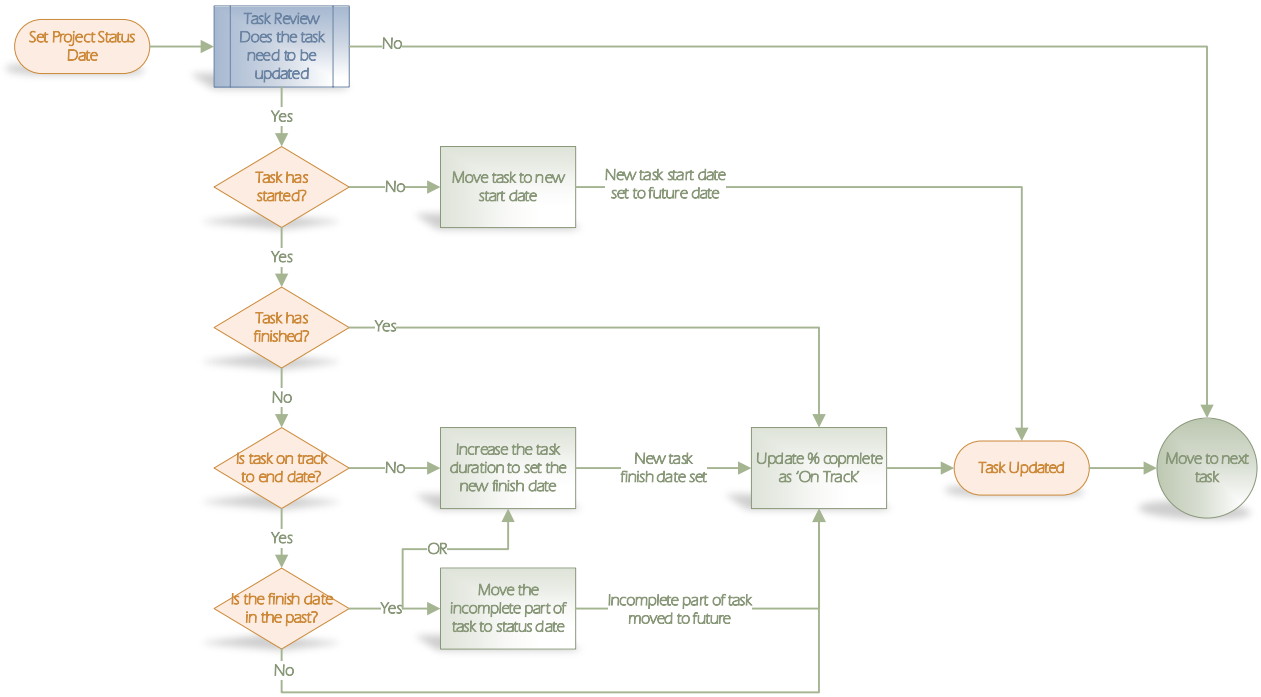
5.1 Updating the Schedule

Schedules must be updated weekly to align with reporting requirements.

Update/review the following:

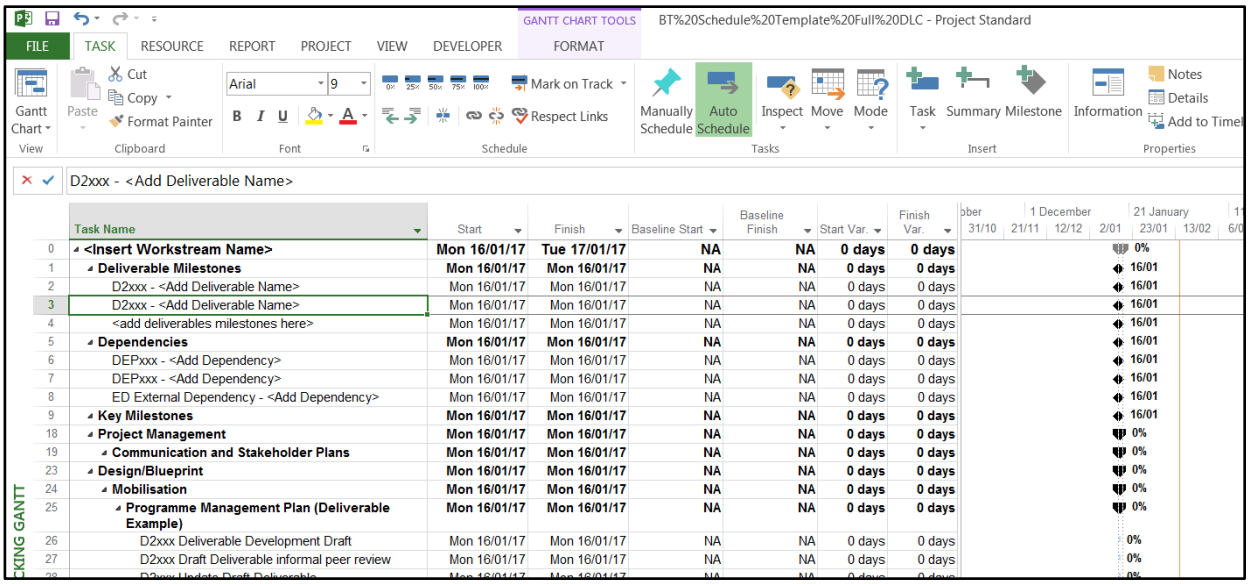
1. Set the Status Date to Friday of the reporting week
2. Does the task need to be updated?
    a. No – move to the next task
    b. Yes – Move to the next question
3. Has the task started?
    a. No - then move the task to a future start date
    b. Yes - Move to the next question
4. Has the task finished
    a. No - Move to the next question
    b. Yes - then update percentage complete as on track

5. Is the task on track to finish?
    a. No - then review the duration and increase to move finish date and update percentage complete as on track
    b. Yes - Move to the next question
6. Is the finish date in the past?
    a. No – then move the incomplete part of the task to the status date OR review the duration and increase to move finish date and update percentage complete as on track
    b. Yes - then update percentage complete as on track



5.2 Tracking

Review the variances from the Tracking Gantt view. (select this from the Gantt chart button). This will show the baseline start and baseline finish against your actual progress. Refer to screenshot below:



5.3 Critical Path

BT Schedules will use an 'Informed Critical Path'. For information on this please see the PMO.

5.4 Closing

After making updates to the schedule, do not forget to click "Publish" and close the schedule to save your changes back to Project Online.

6 Reporting

6.1 Schedule Performance (SP) Reporting

Schedule Performance (SP) is the sum of the baseline work (measured in hours) completed for tasks by a specific date.

When creating a plan, the following information must be captured (at the lowest task level):

- Start Date
- Duration
- Work (Effort)
- % Complete
- Finish Date is calculated based on start date + duration.

Note: Resources are not required for the calculation however resource roles can be assigned to tasks to calculate work.

Once the plan has been baselined, the values entered above are locked and used for the SP calculation unless the task's planned effort is changed and baselined in which case the revised effort is used.

After the plan is updated, the following calculation is used to calculate SP eg, If a task's % complete is greater than 0%, then EV (or Budgeted Work at Completion) is equal to planned effort.

7 Support /Feedback System

Any feedback and assistance needed on MS Project or Project Online, please contact the PMO.