

Project Scheduling Guidance and Expectations

This document is intended to provide Project Leaders (PLs), Consultant Project Managers (CPMs) and Local Agency Liaisons (LALs) with guidance and expectations concerning project scheduling within ODOT. What follows should be interpreted as the minimum standard for all STIP projects that require a schedule in the Resource Management System.

The required scheduling tool for all project management and reporting functions is MS Project Professional 2003 and MS Project Server 2003 which are components of the Resource Management System.

Schedule Management Expectations

The Resource Management System allows technical discipline resource managers to effectively manage their resource pools and will show if a project has a schedule as well as the date of the latest change. Quality Assurance and Quality Control reports will be produced monthly by the Resource Management System Administrator to ensure adherence to minimum scheduling standards.

PLs, CPMs, and LALs are the keys to the success of the scheduling system. It is their responsibility to:

- Ensure all projects have the appropriate schedule (default or reviewed) entered and published into the system.
- Initiate the workplanning activities at the appropriate time prior to the project start date.
- Actively manage project schedules with project team input.

When should a project schedule be published to the Enterprise Server?

Publishing a project schedule to the server is needed to allow schedule information to be accessed and viewed. A key objective is to publish all schedules as early as possible so that resource managers have a complete portfolio of all activities they are expected to accomplish and can forecast generic resources needs.

Project schedules must be initiated, developed and published to the server at the initial scoping of the project. It is understandable that limited information will be available to develop a project schedule until scoping is complete. However, it is expected that the PL, CPM or LAL will adjust the template durations to reflect what is realistic for their region and to build in any specific time-related constraints necessary for the project. For example, environmental work may be done in early summer; drilling operations may be done during the "In-Water Work Period"; and starting design work may be done outside of typical Technical Center workload peaks.

Project schedules must be published to the server after each revision and must be republished within 5 business days of any changes that affect the critical path or require resource units to adjust their work effort.

When should a project be baselined?

Baselining a project schedule allows a previously published schedule to be compared to the most current schedule. This is accomplished by storing the previously published schedule(s).

Project schedules must be baselined at the completion of the Project Initiation (saved to Baseline 9 in MS Project) and Design Acceptance (saved to Baseline 10 in MS Project) phases of the project. Project schedules can also be baselined at other times with significant changes to a project.

How often should project schedules be updated?

Every project will have an actively maintained and managed schedule. A fully detailed project schedule shall be reviewed, and updated and re-published, if necessary, on or before the last working day of every month. Project leaders must update and publish project schedules immediately when changes impact the critical path or require resource units to adjust their work effort.

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STIP Projects That Do NOT Require a Schedule

The STIP includes projects with certain data elements that should be excluded from utilization reporting as they are already accounted for as either a project going to construction, or will not necessarily result in a construction project.

Monitor Code: FNLPLN, ROWACQ, UTLREL (**This group has been questioned**)

These monitor codes indicate that the project includes Design, Right of Way Acquisition and/or Utility Relocation work only, and the Construction portion of the project will occur separately under a different key number, or has not yet been funded and/or approved. These projects do not require a schedule as they do not by themselves result in a project going to bid.

Option Code: "O" for Other, "R" for Rail and "T" for Transit

Projects with these codes are excluded as they are generally not construction projects or do not let through Commission Services.

Work Type: "CMAQ", "TRANST" and "IOF"

These projects are excluded because "CMAQ" and "IOF" are funds given directly to the Local Agency for projects handled solely by the Local Agency with no ODOT involvement, and "TRANST" projects involve non-state highway related projects, such as bus purchases, park & ride developments and other projects to support public transit.

Contract Number

Projects that are not going to be let through Commission Services are assigned a code in the Contract Number field to indicate the responsible party for project delivery. "CIF" indicates that City Forces will handle the project delivery, "COF" indicates that County Forces will handle the project delivery, "STF" indicates that State Forces will handle project delivery, "RRF" indicates that Railroad Forces will handle project delivery, "COE" indicates that the US Army Corp of Engineers will handle project delivery, "WFLHD" indicates that Western Federal Land Highway Division will be handling project delivery, and EXCHNG indicates that the project is a jurisdictional exchange and does not involve construction.

OBDP/Local Only

Projects managed by OBDP and projects administered entirely by the Local Agency, with no ODOT involvement, (identified by OBDP or LOCAL in the Admin by field in PCS) do not require schedules. OTIA III schedules are interfaced into the Resource Management System via an interface from OBDP.