

Appendix C: Activity/Task Category Field Standards

S The following tables describe the activity and task category field standards.

Activity Category Field Standard

Position	Code	Description
1	X	Planned Maintenance and Upgrades Activity Place Holder – activities added by the Supervisor as a place holder in the two year Planned Maintenance and Upgrades team plan that have an estimate to complete greater than 400 hours. A detail project should be created prior to starting any work.

Task Category Field Standards

Position	Code	Description
1	blank	Indicates task was part of original base lined project.
1	U	Unplanned Task – identified by IT that was not included in the Scope and Approach. Unplanned tasks should have a category code “U” in the 1 st position of the task category field. The Scope Change Management task estimate to complete should be decremented by the total hours of the added Unplanned task(s). Efforts for identifying and planning for Unplanned task(s) should be tracked directly to the Scope Change Management task in the Project Management phase. From that point forward, effort expended to complete the Unplanned task should be tracked to the added Unplanned task(s).
1	C	Scope Change Task – identified by the Customer that was not included in the Scope and Approach. The Project Manager adds the Scope Change task(s) in appropriate phase(s) in the project with a “C” entered in the 1 st position of the task category field. The Scope Change Management task estimate to complete should be decremented by the total hours of the added Scope Change task(s). Efforts for identifying and planning for Scope Changes should be tracked directly to the Scope Change Management task in the Project Management phase. From that point forward, effort expended to complete the Scope Change should be tracked to the added Scope Change task(s).
1	D	Descoped Task – identified by the Customer or IT that was included in the Scope and Approach, but is no longer required or needs to be addressed in a later phase of the project. As a result, a decrease in Scope must be negotiated with the Customer. The Project Manager enters a “D” in the 1 st position of the task category field, zero in the estimate to complete, the task status as completed on tasks where the effort is being descoped.
1	I	Issue Related Task – issue identified that needs to be tracked separately. The Project Manager adds the issue task(s) in Project Management phase following the Issue Management task with an “I” entered in the 1 st position of the task category field. The Issue Management task estimate to complete is decremented by the total of the added issue task(s). Efforts for identifying and planning for issue task(s) should be tracked directly to the Issue Management task. From that point forward, effort expended in resolving the issue should be tracked to the added issue task(s).
2	M	Mandated Task – required due to changes in Local, State, or Federal legislation.

Position	Code	Description
3	N	Non-billable Task – not billable to an IT customer.
4	I	Incoming Milestone Task – the project team is waiting on a deliverable from an external source such as a vendor or another division, i.e. Technical Systems & Network, etc.
4	M	Major Milestone Task – a critical event in the project, such as a "go live" date, obtaining Executive Management approval, or completion of major deliverables.
4	O	Outgoing Milestone Task – the project team is responsible for providing a major deliverable to another project or party.
5	B	<p>Budget Task – the key word “<i>Budget</i>” must appear in the original task description. All budget tasks should have a “B” in the 5th position of the task category code. A budget task can be added to a project for one of the following reasons:</p> <ul style="list-style-type: none"> • Work effort is not known until the resource is assigned. • Work effort is not known when supporting the installation of a system by a vendor. • A consulting service is being used for development and/or implementation. • Work effort needs to be tracked on subordinate tasks. <p>Work effort can be directly tracked to the budget or subordinate tasks. When creating subordinate budget tasks, the original task name should be changed to include the key word “<i>Budget</i>” and the estimate to complete should be decremented by the total hours of the added budget task(s). Efforts for identifying and planning for budget tasks should be tracked directly to the original budget task. From that point forward, effort expended to complete the budget task(s) should be tracked to the subordinate budget task(s).</p> <p>Note: Original budget tasks do not normally have resource assignment other than the role of Programmer (PG) and have an estimate to complete.</p>
5	P	Preliminary Estimate Task – used for budgeting estimated work effort or resources that may be required in future phases of the project. Preliminary tasks should have a “P” in the 5 th position of the task category code. The preliminary estimate to complete generally has an accuracy factor of –10% to +25% based on incomplete data and on a high level Scope and Approach.
6	T	<p>Training Class Task – used for training classes that are specific to a particular Enhancement or New Development project. Training Class tasks should have a “T” in the 6th position of the task category code. For example, IT is conducting an end-user training class for a new software application.</p> <p>Training given by an IT Employee for an existing computer system should be tracked in the Customer Support Team Plan (see Appendix G). Training received by an IT Employee for an application that is not project-specific (Clarity, for example) should be tracked to a Training task in the Non-Project plan.</p>

S Enter a tilde (~) as a place holder in the Task Category field for positions not being used. For example the Task Category field for a Preliminary Estimate task would be ~~~~P.