

Section 7: Weekly Tracking

Overview




Immediately following the weekly *Timesheet* posting cycle, *Resource Managers* and *Project Managers* must prepare project plans for the coming week. *Team Members* will create new *Timesheets* requiring the most current task information possible for tracking purposes. *Project Managers* will update detailed project plans with the current status in *Clarity* for reporting purposes. *Open Workbench*, through views, will provide the necessary steps to assist *Resource Managers* and *Project Managers* with this process.

Weekly Tracking and Clarity

Weekly tracking for detailed project plans begins in *Clarity*, and is later reviewed and refined using *Open Workbench*. To begin weekly tracking in *Clarity*

Review Project Dashboard

The *Project Dashboard* displays several views that contain project information. *Project Dashboard* data is drawn from the information entered for tasks and resource assignments, as well as the data submitted on weekly timesheets. Several of the views display alerts, in the form of flags:

	Green	On-Track.
	Yellow	Warning.
	Red	Critical.

As part of the Weekly Tracking process, the *Project Manager* should review the information on the *Project Dashboard* to assess the overall status of the project. Particular attention should be paid to yellow and red flags. Project information cannot be modified on the *Project Dashboard*. Refer to the [Weekly Tracking and Open Workbench Views](#) section for more information on modifying project data.

Baseline

Project baseline information is shown on the project's *Baseline* tab. *Project Managers* and *Supervisors* can use this information to compare multiple baseline iterations to previous versions, and to the initial baseline, in order to identify and analyze changes in the project usage and schedule.

Weekly Tracking and Open Workbench Views

The *Open Workbench View Library* is broken down into a number of folders, based on the status of the *Project Planning and Control* process. The *Weekly Tracking* folder contains all the necessary views to perform *Weekly Tracking*.

Add Tasks

This view displays all tasks in the plan and should be used when adding tasks or to review the plan in detail.

Review the project to determine where to insert added tasks. Added tasks should be either *Scope* or *Issue* related.

When adding tasks to a project plan resulting from *Scope Change*, the *Project Manager* must obtain *Scope Change* approval, and decrement the *Scope Change* task in the *Project Management (PM) Phase* by the total amount of *ETC*. If the *Scope Change* task remaining *ETC* is not enough to cover the added tasks, the *Project Manager* must renegotiate the project for additional *Scope* hours. Refer to *Section 4: Change Request Process*, for more information.

S *New tasks that result from an approved scope increase must be added to the project plan at the appropriate point(s) in the project. These tasks must be flagged by entering a “C” in the first position of the task Category field. The Scope Change Management task should be decremented by the total ETC amount of the added Scope Change task.*

S *Time spent for Scope Change planning, analyzing, documenting and obtaining approval should be tracked directly to the Scope Change Management task.*

S *Unused ETC in an added Scope Change task must be added back into the PM Phase Scope Management task ETC once the added task has been completed.*

Issues may be tracked to the *Issue Management* task in the *PM Phase* or the *Project Manager* may create a separate task for more specific issue tracking. When adding tasks to a project plan resulting from an issue, the *Issue Management* task in the *PM Phase* must be decremented by the total amount of *ETC*. If the *Issue* task remaining *ETC* is not enough to cover the added tasks, the *Project Manager* can use *Contingency* hours. If the *Contingency* remaining *ETC* is not enough to cover the added tasks, then the *Project Manager* must renegotiate the project.

S *New tasks that result from an issue must be added to the project plan at the appropriate point(s) in the project. These tasks must be flagged by entering an “I” in the first position of the task Category field. The Issue Management task ETC should be decremented by the total ETC amount of the added Issue task.*

S *Time spent for issue identification, monitoring, tracking and resolution should be tracked directly to the Issue Management task.*

S *Unused ETC in an added Issue related task must be added back into the PM Phase Issue Management task ETC once the added task is complete.*

Once tasks have been added and the *ETC* adjusted, the project should be *Autoscheduled* using the first day of the current work week.

Note: Do not add tasks while in a Team Group Plan. If a task is accidentally added in a *Team Group Plan*, the task will be added to the wrong project plan. Instead, open the individual project plan to add tasks.

Review Weekly Actuals

This view displays the *Actuals* entered for the prior week time reporting period. The date shown in the *Time Scale* is the first day of the time reporting period (always starts with a Saturday).

Review *Actuals* entered for each *Team Member* making sure that hours were tracked as the *Project Manager* had intended. If *Actuals* have been tracked incorrectly, notify the *Team Member* to adjust the *Timesheet*.

Complete Tasks/Revise End Date

This view will display all started tasks in a project.

Review started tasks to determine tasks that can be completed. When completing tasks, change the *Estimated to Complete (ETC)* to zero, the end date to the actual date the task was completed, and the status to “Completed”.

Note: Task end dates cannot be changed prior to the *Actuals* through date.

ETC Equal to Zero

This view displays all tasks that have *ETC* equal to zero.

Review tasks to determine those that should be completed or *ETC* that should be changed. Refer to [Complete Tasks/Revise End Date](#), for completing tasks with zero *ETC*. When adding *ETC* to a task, remember to decrement the *Contingency* task.

S When the remaining *ETC* on a task is determined to be too low, the *ETC* should be increased. The amount of the increased *ETC* should be subtracted from the *Contingency* task *ETC* within that phase. For example, if the original *ETC* for a programming task needs to be increased by 7 hours, the *Contingency* task *ETC* in the programming phase is decremented by 7 hours.

Past ETC Not Equal to Zero

This view displays all *ETC* in the past for assigned *Team Members*.

Review the time scale total for the week. If the total is not zero, scroll through the project to identify specific tasks with an *ETC* greater than zero in the time scale. Review the *Actual Thru Date* to determine if the *Team Member* posted time through the current time period.

Listed below are some of the reasons why *ETC* in the past could exist:

- Locked tasks in the past that have not been started. *Project Manager* should unlock tasks and *Autoschedule* or change the task start date to a future date when the task will actually start.
- *Autoschedule* was not performed.
- *ETC* does not move forward until *Actuals* are posted for the resource.
- *Open Workbench* does not move *ETC* forward on generic roles. *Project Manager* must adjust *ETC* manually.

Check Fixed Locked

This view displays all *Tasks* and *Milestones* that have not been completed where the duration is fixed and the end date is locked. Keeping accurate track of the fixed and locked dates is important to ensure the schedule is being met.

Review all *Tasks* and *Milestones* with fixed durations and locked dates. If the *duration or date* is no longer valid, then change the end date to reflect the new schedule. If the overall schedule is affected, then a project renegotiation may be required.

Milestones Status Tracking

This view displays all *Milestones* in a project. Keeping accurate track of the *Milestones* is important to ensure deliverables are being met on time. *Milestones* serve as predecessors or successors to other tasks, therefore any slippage may impact the rest of the schedule.

Review all *Milestones Planned End Dates*. If the *Milestone* should be completed, change the end date to the actual date the *Milestone* was completed and change the status to “*Completed*”. *Milestone* end dates should always be in the future, change *Milestone* end dates that are in the past. Verify future *Milestone* end dates to ensure the delivery is on track. Review *Milestones Planned End Dates* that are locked and adjust dates according to the revised schedule.

Contingency Status – All Phases

These views display tasks for all phases of the project and less than zero variance.

Review *Contingency* tasks (*Task ID* = XX9997, XX represents the *Phase ID*) and the *Contingency* task remaining *ETC* for each phase. If a *Contingency* task requires additional *ETC*, increase the task *ETC* and decrement the *Contingency* task for the phase. Decrement the *Contingency* task by the total amount of the increased *ETC*. If the *Contingency ETC* is not enough to cover the increased *ETC*, then the *Project Manager* may either move *Contingency ETC* from another approved phase or renegotiate the project. If no *Contingency ETC* remains for other phases, the *Project Manager* must renegotiate the project.

Dependency Violations

This view displays tasks with dependency violations. The dependency violations are highlighted in bright green in the primary task name field of the view.

Review all highlighted tasks. Review the task and the related tasks start and end dates to determine which of the related tasks may be causing the violation. The most common occurrence is where a successor task or milestone has started prior to its predecessor. If the highlighted task is not started, the *Project Manager* may consider realigning the dependencies.

Note: Not all dependency violations may be resolved, but the *Project Manager* should attempt to resolve tasks that have not yet been started.

Charge Code Review

This view displays *Charge Codes* that are associated at an activity level with the project plan. This view should be used for *Team Group* and individual *Team* plans only.

Scroll through the project ensuring that all activities have been assigned a correct charge code. All *Non-Project*, *Team Management*, *Customer Support*, *System Maintenance* and *Planned Maintenance and Upgrade* plans must have a *Charge Code* assigned at the activity and task level. If a *Charge Code* is incorrect or missing, the *Project Manager* can add/change the *Charge Code*. Activities and tasks with missing *Charge Codes* will appear on the *PMO Weekly PM System Reporting* email.

1. From this view, under **Task Charge Code**, click the drop down menu to select a **Charge Code** for a task.
2. Click the correct **Charge Code**.
3. From the menu bar, click **File...Save**.

Note: If the *Charge Code* is changed for a task with *Actuals*, the *Project Manager* should notify *PMO*. *Timesheets* will need to be adjusted to prevent billing errors.

Charge Code Review – Detail Plan

This view displays *Charge Codes* that are associated at the project level. This view should be used for detail project plans only.

Review *Charge Code* shown at the top of this view to determine if correct. If an incorrect *Charge Code* has been entered, the *Project Manager* must notify and work with the *Project Management Office (PMO)* to correct any *Timesheets* that may have already posted or been billed.

Review Weekly Actuals/Notes

This view shows *Team Member* weekly *Actuals* and the task notes that have been added by the *Resource Manager* or *Project Manager*.

Review the note text for specific tasks and the *Team Member Actuals* in the time scale. Remove and update notes where applicable.

Monitoring Project Variance

Project Managers are responsible for monitoring *Project Variance* on a weekly basis when performing weekly tracking. There are many different types of variance the *Project Manager* must pay attention to. *Usage Variance* occurs when *Total Usage (Actual hours worked plus Estimate To Complete)* is significantly greater or lower than the *Baseline Usage*. *Date Variance* occurs when the *Scheduled Finish Date* is considerably earlier or later than the *Baseline Finish Date*. *Unapproved Activity* is another type of *Project Variance*. *Unapproved Activity* happens when work is done on unbaselined tasks, such as prior to the

project being approved and baselined, or when an approved project's *Scope Change Management* budget is exceeded.

Project Variance can be caused by a number of factors:

- *Low Estimates* are a frequent cause of *Usage Variance*. Once the *Contingency* budget for a project phase is exceeded, the project may be in negative usage variance.
- *High Estimates* may also be a cause for *Usage Variance*. Occasionally task estimates in a project that are consistently high may result in positive usage variance.
- *Not following process* may also be a cause for *Usage Variance*. If *Scope Change Management* and/or *Contingency* budget tasks are decremented correctly, the negative variance caused by the extra work will be balanced out by the positive variance in these budget tasks. If these processes are not followed consistently, and the budgets are not decremented, the project will appear to be in negative usage variance.
- *Overcommitting Resources* can be a cause of *Finish Date Variance*. Despite the best planning efforts, resources may not always be available to work on the project as often as was anticipated. This causes tasks to take longer to complete, and can eventually cause the entire project to be late.
- *Unexpected Delays* can contribute to *Finish Date Variance*. Most projects involve external resources, such as customers and vendors, whose actions are beyond the *Project Manager's* immediate control. If these resources fail to meet their commitments and deadlines the *IT* project team may not be able to continue their work as scheduled.

Project Variance is most often caused by a combination of these and other factors.