

## MS Project High Visibility Scheduling - The Status Update Process

This process assumes a schedule constructed so that changes will properly affect surrounding tasks. First set the status date for the current update. Then baseline the project. Use the Late Tasks Only filter to highlight all the tasks that have a late status. For each late task ask the task owner whether the task is on schedule for its current finish date. If it is use the Mark On Track menu button to set the task percent complete so that it is on schedule for the current status date and no longer late. If it has slipped or improved and will finish on a different date change its duration so that it finishes on the new date. Then mark the task on track for the new finish date.

Create two columns on your status update table. The first is the duration variance column. The second is the finish variance column. If the task has changed its duration you'll see a non zero value in the duration variance column. You'll also see a value in the finish variance column and if you look up and down the finish variance column you will see the ripple effect from the change you made. See if any of your key milestones are affected by the duration change that you just made. Any task that has changed its finish date and is on the critical path to a slipped milestone is a candidate for adjustment to get the milestone back on schedule.

When you have processed all your late tasks your project will now be on schedule for the current status date. Display your project summary task, task zero. The finish variance summary will show how much your overall project finish date has slipped or improved as a result of one or more changes in durations that you made during your status update. You can now create a summary report that highlights what milestones slipped, by how much, and why, and the overall project finish date change if any and why. You will also get the current project % duration complete and % work complete which you can compare with your previous update to see your execution progress.

Note we don't ask the task owner for % complete because the task owner is not likely to know what the percent complete should be for the current status date. The result will be that the task will appear either ahead or behind schedule. MS Project will use this information to project a new task completion date which may or may not agree with the task owners projection. It's more practical for the task owner instead of MS Project to take responsibility for the finish date and let MS Project calculate the percent complete for that projection.

We also don't ask the task owner how much time they spent on a task because that also will most likely produce a change in the task finish date based on how much time should have been done by the status date. Time worked should be captured in a separate labor claiming application. It's not practical for your schedule to represent all of the detail in a participant's work day.

Finally we also don't use vacation or holiday calendars. Instead we expect task owners to look at when their tasks take place on the calendar and estimate the dates when they will be done considering their own schedules. It has been our experience that when holiday and vacation calendars are used and conditions change such that some of that time needs to be used for project execution it creates additional complexity in the project schedule. This approach has proven to be extremely practical and has not been a problem for our project teams.

Project executives receiving reports from this process are extremely grateful to know what's happening to their milestones and overall target dates and why. They find that traffic light reports omit information they need to manage their organizations. Project teams likewise are relieved to be able to report in a way that puts the ball in management's court. Armed with this information management is now responsible to either accept the changes or take action that will help the teams get back on schedule.

The process described here is a simplified subset of what we at [PAI](#) use in our practice. A combination of special views, tables, filters, custom fields, and macros speeds the process and provides a high degree of visibility into what's happening in the schedule. We call this high visibility scheduling.