Microsoft Project 2019

Step by Step

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8

Track progress: Basic techniques

Practice files

For this chapter, use the practice files from the Project2019SBS\Ch08 folder. For practice file download instructions, see the introduction.

Until now, you have focused on project planning—developing and communicating the details of a plan before actual work begins. When work begins, so does the next phase of project management: tracking progress. *Tracking* means recording details such as who did what work, when the work was done, and what the cost was. These details are often called *actuals*. As you start tracking actuals on tasks, a number of things happen. As you record progress on a task, Project 2019 calculates actual and remaining cost, work, and duration values. These updated values are rolled up to their summary tasks. Such changes result from Project dynamically recalculating the plan.

This chapter guides you through procedures related to saving a baseline of your plan, tracking a plan as scheduled, entering a task's completion percentage, and entering actual values for tasks.

In this chapter

- Understand progress tracking
- Save a baseline of your plan
- Track a plan as scheduled
- Enter a task's completion percentage
- Enter actual values for tasks

Understand progress tracking

Tracking actuals is essential to properly managing a project, which goes beyond just planning it. The project manager must know how well the team is performing and when to take corrective action. When you properly track project performance and compare it with the original plan (as saved in a baseline), you can answer such questions as the following:

- Are tasks starting and finishing as planned? If not, what is the impact on the project's finish date?
- Are resources spending more or less time than planned to complete tasks?
- Are higher-than-anticipated task costs driving up the overall cost of the project?
- When planning similar projects in the future, will you be able to determine how good your (or the team's) estimating skills were in earlier projects?

Project supports several ways to track progress. When you choose a tracking method, think about the level of detail or control you, your project sponsor, and other stakeholders require. Tracking the fine details of a project requires additional work from you and possibly also the resources working on the project. Therefore, before you begin tracking progress, you want to determine the level of detail you need.

Project offers the following levels of tracking detail, ordered from simplest to most comprehensive:

- Record project work as scheduled. This level works best if everything in the project occurs exactly as planned.
- Record each task's percentage of completion, either at precise values or at preset increments such as 25, 50, 75, and 100 percent.
- Record the actual start and finish dates and the actual and remaining work and duration values for each task or assignment.
- Track assignment-level work by time period. This is the most detailed level of tracking. Here you record actual work values per day, per week, or at some other interval. (Chapter 14, "Track progress: Detailed techniques," addresses this level of detail.)

Because different portions of a project sometimes have different tracking needs, you might need to apply a combination of these approaches within a single plan. For example, you might want to track high-risk tasks more closely than low-risk ones.

Save a baseline of your plan

After you develop a plan, one of your most important activities as a project manager is to record actuals and evaluate project performance. As you record actuals or update your plan, the scheduled plan will likely change. Keeping track of the plan in its original state becomes more difficult.

A task's start, finish, and duration values describe the current "as scheduled" state of that task. As you enter Actual Start and Actual Finish dates, the Start, Finish, and Duration fields update to reflect the current state of that task.

To judge project performance properly, compare the performance with your original plan, called the *baseline plan* (or just the baseline). Saving a baseline captures the original scheduled start, finish, and duration values in addition to the work and cost values per task, resource, and assignment. The baseline also includes work and cost values distributed over time (called timephased values, which you work with in Chapter 14). Use the baseline for later comparison when you look at what you thought was going to happen and what actually happened.

When you save a baseline, Project takes a snapshot of the existing values and saves it in your plan for future comparison. You want to save a baseline in these situations:

- You have developed the plan as fully as possible. (You can still add tasks, resources, or assignments to the plan after work has started—this is often unavoidable.)
- You have not yet started entering actual values, such as a task's percentage of completion.
- You want to save a subsequent baseline (up to 11 per plan).

The specific values saved in a baseline include several task, resource, and assignment fields, in addition to timephased fields.

Task Fields	Resource Fields	Assignment Fields
Start	Work and timephased work	Start
Finish	Cost and timephased cost	Finish
Duration		Work and timephased work
Work and timephased work		Cost and timephased cost
Cost and timephased cost		

Project supports up to 11 baselines in a single plan. The first one is called *Baseline*, and the rest are *Baseline 1* through *Baseline 10*. Saving multiple baselines can be useful for projects with especially long planning phases, when you might want to compare different sets of baseline values. For example, you might want to save and compare the baseline plans every month as the planning details change, or you might want to save a new baseline at various points during project execution. For example, you might save Baseline before work starts, save Baseline 1 six months after work starts, save Baseline 2 twelve months after work starts, and so on. You can then view the various baselines and compare them to the actual schedule throughout the project's duration.

One great way to see tasks' scheduled and baseline values side by side for easy comparison is in the Variance table as shown in Figure 8-1.

TASK SHEET

	Task	Task Name	Start	Finish	Baseline Start	Baseline Finish	Start Var.	Finish
0		**New book launch**	**Jan 9 '23**	**Feb 28 '23**	**Jan 9 '23**	**Feb 28 '23**	**0 days**	**0 days**
1		**Planning Phase**	**Jan 9 '23**	**Jan 23 '23**	**Jan 9 '23**	**Jan 23 '23**	**0 days**	**0 days**
2		Assign launch te	Jan 9 '23	Jan 9 '23	Jan 9 '23	Jan 9 '23	0 days	0 days
3		Complete authc	Jan 10 '23	Jan 16 '23	Jan 10 '23	Jan 16 '23	0 days	0 days
4		Schedule autho	Jan 9 '23	Jan 16 '23	Jan 9 '23	Jan 16 '23	0 days	0 days
5		Design and ord	Jan 10 '23	Jan 23 '23	Jan 10 '23	Jan 23 '23	0 days	0 days
6		Planning compl	Jan 23 '23	Jan 23 '23	Jan 23 '23	Jan 23 '23	0 days	0 days
7		**Internal Launch F**	**Jan 24 '23**	**Feb 10 '23**	**Jan 24 '23**	**Feb 10 '23**	**0 days**	**0 days**
8		Kickoff book la	Jan 24 '23	Jan 24 '23	Jan 24 '23	Jan 24 '23	0 days	0 days
9		Prepare book P	Jan 26 '23	Jan 27 '23	Jan 26 '23	Jan 27 '23	0 days	0 days
10		Plan author's tr	Jan 26 '23	Feb 2 '23	Jan 26 '23	Feb 2 '23	0 days	0 days
11		Channel Sales p	Jan 26 '23	Feb 1 '23	Jan 26 '23	Feb 1 '23	0 days	0 days
12		Complete book	Feb 2 '23	Feb 3 '23	Feb 2 '23	Feb 3 '23	0 days	0 days
13		Prepare book s	Feb 2 '23	Feb 8 '23	Feb 2 '23	Feb 8 '23	0 days	0 days
14		Distribute inter	Feb 9 '23	Feb 10 '23	Feb 9 '23	Feb 10 '23	0 days	0 days
15		**Public Launch Ph**	**Feb 13 '23**	**Feb 28 '23**	**Feb 13 '23**	**Feb 28 '23**	**0 days**	**0 days**
16		**Author travel a**	**Feb 13 '23**	**Feb 14 '23**	**Feb 13 '23**	**Feb 14 '23**	**0 days**	**0 days**
17		Author radio	Feb 13 '23	Feb 13 '23	Feb 13 '23	Feb 13 '23	0 days	0 days
18		Author readir	Feb 14 '23	Feb 14 '23	Feb 14 '23	Feb 14 '23	0 days	0 days
19		Distribute adva	Feb 13 '23	Feb 14 '23	Feb 13 '23	Feb 14 '23	0 days	0 days
20		Distribute book	Feb 13 '23	Feb 14 '23	Feb 13 '23	Feb 14 '23	0 days	0 days
21		Coordinate maj	Feb 15 '23	Feb 23 '23	Feb 15 '23	Feb 23 '23	0 days	0 days
22		Launch public w	Feb 15 '23	Feb 21 '23	Feb 15 '23	Feb 21 '23	0 days	0 days

FIGURE 8-1 *Displaying the Variance table is a great way to compare tasks' scheduled and baseline values.*

For example, consider a plan in which the Start and Finish dates are the "as scheduled" dates. These might differ from the Baseline Start and Finish dates either because of the variance caused by actuals that did not match the baseline dates or because of other schedule adjustments that the project manager made.

Project includes several built-in views that compare the current schedule to the baseline—notably, the Tracking Gantt view, which Chapter 14 describes. You can also

modify the Gantt Chart view to include baseline Gantt bars. A baseline Gantt bar represents a task's baseline start, finish, and duration values on the chart portion of a Gantt chart view.

To save a baseline

1. On the **Project** tab, in the **Schedule** group, click **Set Baseline** and then click **Set Baseline**.

   As Figure 8-2 shows, the Set Baseline dialog box opens.

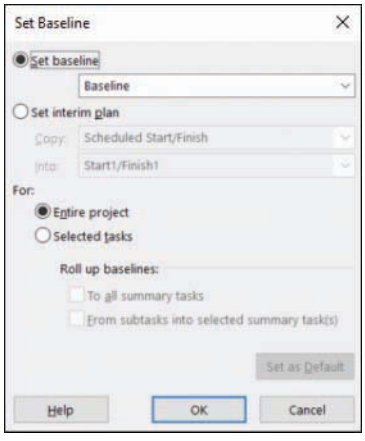

FIGURE 8-2 *In the Set Baseline dialog box, you can save or update up to 11 baselines per plan.*

TIP When working with a plan that includes a saved baseline, you can see when the baseline was saved in the Set Baseline dialog box. The date the baseline was saved appears after the baseline name in the Set Baseline field.

2. To save the plan's initial baseline, click **Set Baseline** and then select **Baseline** from the list.

   Or

   To save a subsequent baseline, click **Set Baseline** and then select the baseline number you want.

TIP Interim plans are similar to baselines. You will work with interim plans and the other options in the Set Baseline dialog box in Chapter 14.

3. Click **OK**.

   Project saves the baseline, even though the Gantt Chart view gives no indication that anything has changed.

To clear a previously saved baseline

1. On the **Project** tab, in the **Schedule** group, click **Set Baseline** and then click **Clear Baseline**.
2. In the **Clear Baseline** dialog box, select the options you want and click **OK**.

To display baseline Gantt bars in a Gantt chart view

1. In a Gantt chart view, on the **Format** tab, in the **Bar Styles** group, click **Baseline** and then click the baseline (**Baseline** or **Baseline 1** through **Baseline 10**) that you want to display.

   Project draws baseline Gantt bars for the baseline you choose.

To display scheduled and baseline values by using the Variance table

1. On the **View** tab, in the **Task Views** group, click **Other Views** and then click **Task Sheet**.

   The Task Sheet view appears. Because this is a tabular view, it does not include a Gantt chart, so more room is available to see the fields in the table.

2. On the **View** tab, in the **Data** group, click **Tables**.
3. Click **Variance**.

TIP You also can right-click the Select All button in the upper-left corner of the active table to switch to a different table.

Track a plan as scheduled

The simplest approach to tracking progress is to report that the actual work is proceeding exactly as planned. For example, if the first week of a 5-week project has elapsed and all its tasks have started and finished as scheduled, you can quickly record this in the Update Project dialog box displayed in Figure 8-3.