“Project Management Using Earned Value”
Case Study Solution 18.1

CASE STUDY
Schedule
Traceability
Schedule Traceability

SOLUTION

1. The milestones for System Requirements Review (SRR), Integrated Baseline Review (IBR), Preliminary Design Review (PDR) Engineering Prototype Available, and System Software Review (SSR) trace between the Master and Intermediate levels and between the Intermediate and Detail levels. In addition, milestones 1, 5 and 8 trace from the Intermediate to the Master Schedule, and are also on the Detail Schedule; therefore they trace from the Detail to the Intermediate Schedule.

Time spans trace within the Master Schedule; within the Intermediate Schedule and between the Master and Intermediate Schedules.

Time spans do not trace within the Detail Schedule or between the Intermediate and Detail Schedules. The Control Account start date is 15 July Year 01 but the first two tasks are scheduled to start on 1 July Year 01 on the Detail Schedule. (We do not even know if we are looking at current or baseline schedule information on the Detail Schedule).

2. The Major Interface Milestones are meaningful on the Master, Intermediate and Detail Schedules. The Program Milestones are not defined: we do not know what Program Milestones 1, 5 and 8 are. There should be a milestone dictionary describing completion/exit criteria for each milestone. In addition, we would also expect to see some control account level milestones for the other work packages on the Detail Schedule. The completion/exit criteria should be defined for these control account level milestones also. (See page 3 of solution).

3. Work progress cannot be traced without statusing the Detail Schedule and determining BCWP. There is no progress evident at the detail level; based on the control account start date, we would expect to see some progress. Progress is evident at the Intermediate Schedule level, but not at the Master Schedule level. (See page 6 of the solution for one way to status the work progress on the CAP.)

4. Work Package #5 shows 180 Requirements @ 5 hours per requirement (900 hours), while the total BCWS reflects only 750 hours (or 150 Requirements @ 5 hours per requirement).

5. a. Generate all tiers of schedules from the same schedule database so the symbology is consistent. In addition, this will yield accurate time span traces if rolled up via the WBS structure.

b. Reflect current status at all schedule levels.

c. Signature blocks should be on the appropriate schedules.

d. Legends should be on all schedules.

e. Both current and baseline schedules should be shown at all levels. “Project Management Using Earned Value,” Solution to Case Study 20.1 Page 3 of 7 © Humphreys & Associates, Inc. 2001
SOLUTION
(Continued)
There are other areas of consideration when reviewing a scheduling system. The following questions should be answered:

♦ Does the baseline support the program/project objectives?
♦ Is all of the scope included in the schedule?
♦ How will changes be controlled?
♦ If resource loaded, is the schedule achievable? Are the resources available when scheduled? Is the time phased budget consistent with the scheduled resources?
♦ Schedule procedures should be reviewed for completeness including verification that those responsible for the work develop the schedule.
♦ Does the overall system successfully address the dual reporting considerations of physical percent complete status to support earned value determination and accurate remaining duration forecasting for schedule analysis?
♦ Is the scheduling system being abused? (e.g., are directed dates being used improperly?)

These questions cannot be answered relative to this particular case study as all of the information required is not available; however, they should be answered when conducting a review on a program.
Milestone Definition Addendum

Control Account: 1040ADC Date: 7/14/01 WBS No.: 1010501 CAM: Thad Baker

Work Package No.: 003

Milestone No.: 1
Description/Completion Criteria: 1st System Software risk list update, review with functional manager and coordination with Company Program Office.

Work Package No.: 003

Milestone No.: 2
Description/Completion Criteria: Complete working session with Program Office scheduler to provide network constraining relationships and probability distributions for each risk list item, root cause/analysis 1st level and development of mitigating alternative actions.

Work Package No.: 003

Milestone No.: 3
Description/Completion Criteria: Review automated schedule risk outputs and modify network / distributions for quarterly report to the Program Office.

Work Package No.: 003

Milestone No.: 4
Description/Completion Criteria: Complete further detail root cause/analysis (2nd/3rd level analysis), where appropriate, finalize selection of mitigating action items and review with functional manager.

Work Package No.: 003

Milestone No.: 5
Description/Completion Criteria: Complete quarterly report update to risk list and risk plan for the System Software risks to the Program Office.

Work Package No.: 003

Milestone No.: 6
Description/Completion Criteria: Status Program Office on progress of assigned risk plan action items, update schedule risk network logic and changes in probability due to realization of actual completions and problems and identify any new risk items.

Work Package No.: 003

Milestone No.: 7
Description/Completion Criteria: Status Program Office on progress of assigned risk plan action items, update schedule risk network logic and changes in probability due to realization of actual completions and problems and identify any new risk items.

Work Package No.: 003

Milestone No.: 8
Description/Completion Criteria: Complete quarterly report update to risk list and risk plan for the System Software risks to the Program Office.
Work Package No.: 003
Milestone No.: 9
Description/Completion Criteria: Status Program Office on progress of assigned risk plan action items, update schedule risk network logic and changes in probability due to realization of actual completions and problems and identify any new risk items.

MASTER SCHEDULE

<table>
<thead>
<tr>
<th>WBS</th>
<th>LEVEL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000000</td>
<td>1</td>
<td>Automated Workstation Program</td>
</tr>
<tr>
<td>1010000</td>
<td>2</td>
<td>Console Subsystem</td>
</tr>
<tr>
<td>1020000</td>
<td>2</td>
<td>System Engineering Management</td>
</tr>
<tr>
<td>1030000</td>
<td>2</td>
<td>System Test &amp; Evaluation</td>
</tr>
<tr>
<td>1040000</td>
<td>2</td>
<td>Production</td>
</tr>
</tbody>
</table>

LEGEND:
- Current Schedule
- Baseline Schedule
- Current Schedule with progress
- Major Interface Milestone
- Program Milestone

Andy Ka,1 Nov Year 01
Program Manager
INTERMEDIATE SCHEDULE: Console Subsystem

<table>
<thead>
<tr>
<th>WBS</th>
<th>LEVEL</th>
<th>DESCRIPTION</th>
<th>YEAR 01</th>
<th>YEAR 02</th>
</tr>
</thead>
<tbody>
<tr>
<td>301000</td>
<td>2</td>
<td>Console Subsystem</td>
<td>JUL</td>
<td></td>
</tr>
<tr>
<td>301020</td>
<td>3</td>
<td>Display Processor</td>
<td>AUG</td>
<td>JUL</td>
</tr>
<tr>
<td>301020</td>
<td>3</td>
<td>Man-Machine Interface</td>
<td>SEP</td>
<td>AUG</td>
</tr>
<tr>
<td>301030</td>
<td>3</td>
<td>Interface Processor</td>
<td>OCT</td>
<td>SEP</td>
</tr>
<tr>
<td>301040</td>
<td>3</td>
<td>Subsystem Integration &amp; Test</td>
<td>NOV</td>
<td>OCT</td>
</tr>
<tr>
<td>301050</td>
<td>3</td>
<td>System Software</td>
<td>DEC</td>
<td>NOV</td>
</tr>
</tbody>
</table>

**Legend:**
- Current Schedule
- Baseline Schedule
- Current Schedule with progress
- Major Milestone
- Program Milestone

**Time Now:**
- JFR
- PDR
- FDA
- SRE

**Program Manager:**
- Andy Kao 1Nov Year 01

**Functional Manager:**
- B. Jones 1Nov Year 01