



MONTHLY SCHEDULE UPDATE

Training Transcript



SEPTEMBER 2017
DISTRICT 3
Production Management Office

Table of Contents

Intro.....	2
What we will cover	2
Important Terms	2
What is a monthly schedule update	3
Why is a Monthly Schedule Update needed?.....	3
What is the process for Monthly Schedule Update?.....	3
How to access ProjectSuite.....	0
ProjectSuite Demonstration – Global view and Project view.....	0
Possible Red Errors	0
Frequently asked questions (FAQs)	0
Recap.....	0
Important Web Addresses	0
DISTRICT 3 Help Contacts.....	0

Intro

Welcome to the Monthly Schedule Update training presented by the District 3 Production Management Office.

The information shared in this training is written based on District 3 processes. While ProjectSuite Enterprise Edition is a statewide application, processes for each district may vary slightly.

What we will cover

There are 7 topics to cover during this training.

- The meaning of important terms will be shared.
- What is a Schedule Update will be explained.
- A detailed walkthrough of the Monthly Schedule Update process will be shown.
- Users will be instructed on how to access ProjectSuite.
- Two video demonstrations are included show a Responsible Person how to enter schedule updates in ProjectSuite.
- Also, there is an explanation of possible error messages and frequently asked questions.

Important Terms

Throughout this training there are scheduling and FDOT terms used. It is important to understand what they mean to ensure this training is successful.

- A **Responsible Person** is an individual who is assigned ownership of an activity for a project.
- An **Activity** is a task that must be completed to accomplish a project.
- **Expected Date** is any future date from today you plan to accomplish an activity.
- **Actual Date** is date an activity really occurred. It can be either today or any date before today.
- **In Progress** means an activity has started but not yet finished.
- The **Data Date** is the date when the last update period was completed.
- **PSM** is FDOT archival or historical retention system for project schedules.
- **Primavera** is the industry software used to develop and maintain project schedules.

What is a monthly schedule update

Monthly Schedule Update is simply a review of project activities. This review is performed monthly on activities in progress and activities that are expected to start in the next 30 days. The responsible person must determine if the activity needs to be updated. An update could arise for several reasons.

The update could be proposing a new expected start and or finish date. Or it could be providing the actual start and or finish date. Sometimes the update is requesting the removal of an activity that is not applicable to the specific project. Or it is requesting an additional activity due to a change in the scope of a specific project. At times, the update is simply informing the project team about the status of an activity by leaving a comment.

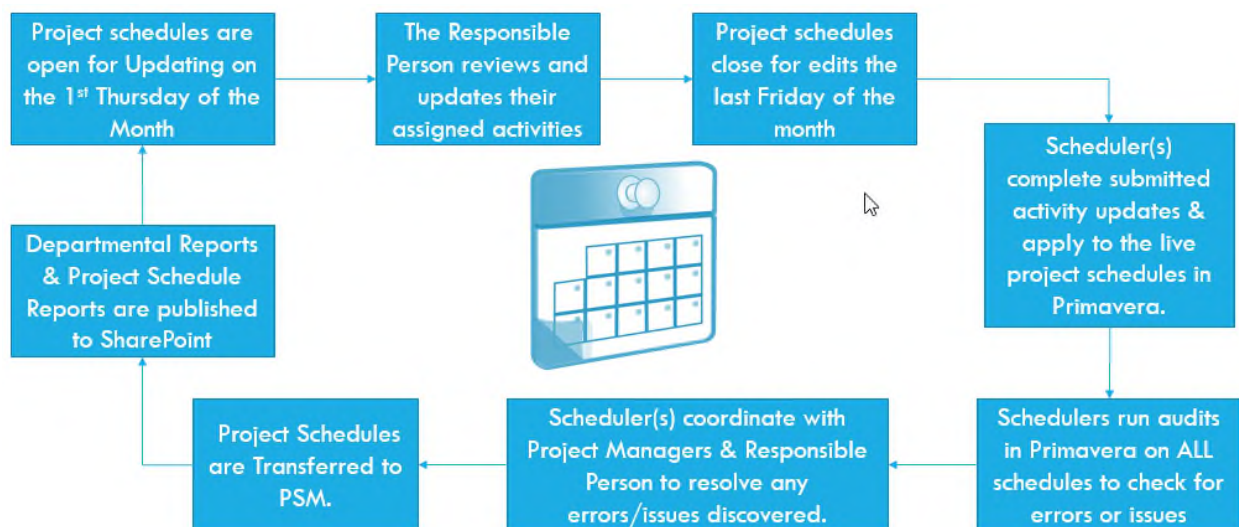
Why is a Monthly Schedule Update needed?

This constant review and updating of project schedules is needed to ensure project information is accurate and current. This information is provided to management and the public.

Also, the update is used to verify the project is still on time. The update can identify the cause for a delay. An accurate project schedule is necessary to support management in making business decisions such as advancing or deferring project funding.

What is the process for Monthly Schedule Update?

The Monthly Schedule Updates process is a constant repetition. The flowchart illustrates the repetitive steps that are performed monthly. This process is a result of many years of fine tuning.



The beginning of the process occurs on the first Thursday of the month. The first step is to open the Project Schedules in ProjectSuite for editing.

The Project Managers and Responsible Person can now begin reviewing and updating assigned project activities. Project schedules are open for approximately three weeks. They close on the last Friday of the month. The date the project schedules close is the date use as the data date.

Once the schedules are closed, the Schedulers complete the submitted activity updates. They apply the changes to the live schedule in Primavera.

Once all changes are applied in Primavera, Schedulers run “audits” to check for errors or schedule issues. If errors or issues are discovered from the “audits”, Schedulers coordinate with Project Managers and the Responsible Person to resolve.

When all errors and issues are resolved, project schedules are transferred to PSM.

Lastly reports are generated from District 3 MS-SQL Report Services. The reports include production meeting reports, department reports & project schedules. The reports are “published” to SharePoint for use by Management, Department Teams, Project Managers and Responsible Persons. Once the reports are “published”, schedules are opened for updating and the cycle starts again.

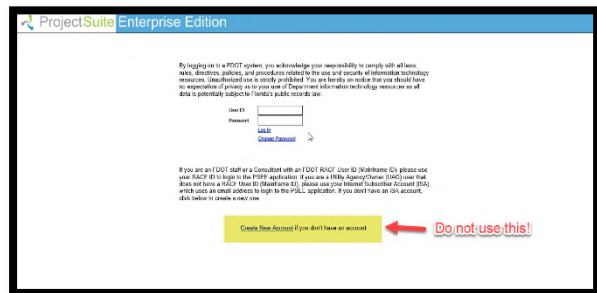
How to access ProjectSuite

Access to ProjectSuite is available to FDOT staff and our project partners. There are two access points to the ProjectSuite application. However, it will look the same. The access point is determined based on your physical location.

The first access is an [internal](#) location. This access is for the staff and consultants who sit inside a FDOT office. These users are already logged into a computer with a FDOT user account. ProjectSuite will not require an additional log in. When users click the link, ProjectSuite will open and their name will appear in the top right corner. A link to ProjectSuite can be found on the [District 3 homepage](#).



The second access is an [internet](#) login page. This is available outside FDOT and to any user who has a RAC F id. Consultants usually know the RAC F as a “k n” user id. FDOT staff can also log in to this link when outside of their office.



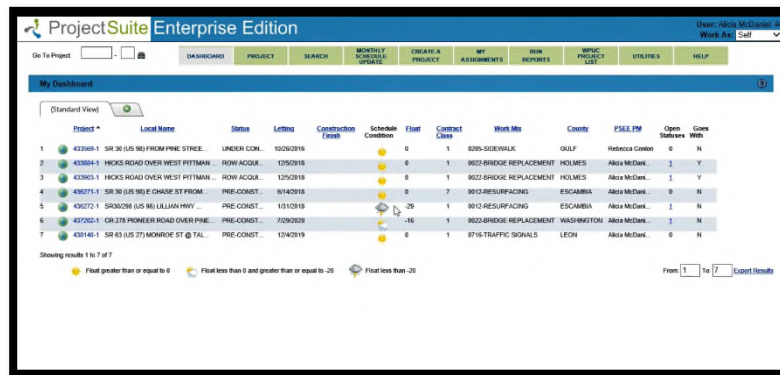
If you have trouble logging in or do not have an account, please contact Erica Hewett. By phone at 8503301332 or by email at erica.hewett@dot.state.fl.us. DO NOT use the “Create New Account” link. This is for creating an Internet Subscriber Account (ISA) and will only get access to the Utility Module.

The addresses for both access points have been included here. It is suggested to add this to your favorites or make a shortcut on your desktop.

- Internal ProjectSuite:
<http://fdotwp2.dot.state.fl.us/ProjectSuiteEnterpriseEdition/Pages/Home/Home.aspx>
- Internet ProjectSuite:
<http://fdotwp02.dot.state.fl.us/ProjectSuite/Pages/Login/LogIn.aspx>

ProjectSuite Demonstration – Global view and Project view

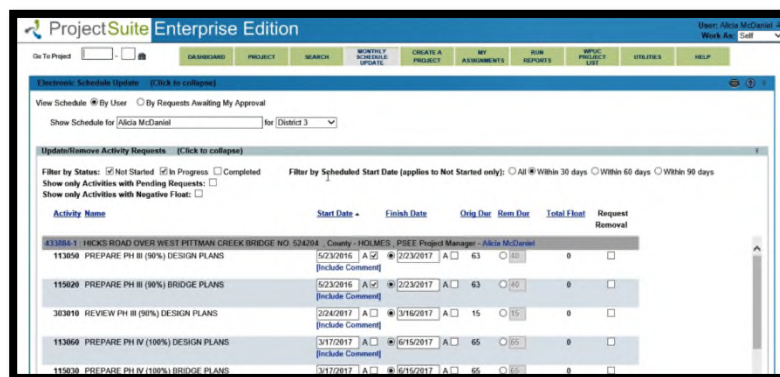
Here are the video demonstrations of how to navigate ProjectSuite and complete your Monthly Schedule Update. You have successfully logged in. Your name is shown at the top right corner. Now you are ready to begin completing your monthly updates.



GLOBAL VIEW:

There are two options for viewing what needs updating. In this video, we will cover the global view option.

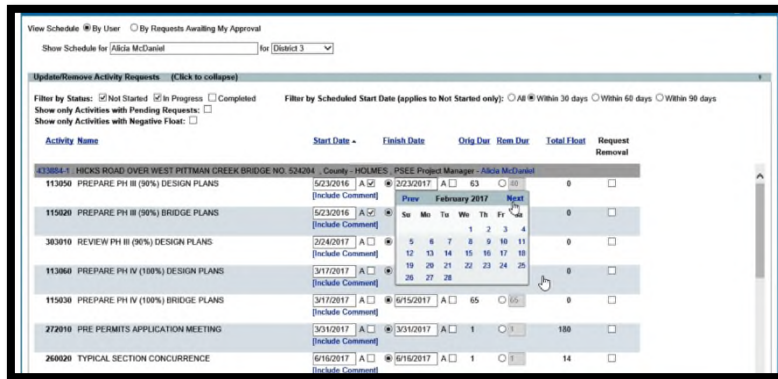
Your first click will be the “Monthly Schedule Update” button at the top of the application. When you click here, projects with activities requiring your attention are shown. You will only see activities which have you listed as the responsible person. Because ProjectSuite knows who is logged in, here it will say “Show Schedule for your name” for District 3.



The first section of the Monthly Schedule Update area shows the filter options. The default is set to show activities with a status of not started or in progress. For those activities not started the default is only the activities in the next 30 days. Now this counts 30 days from today's date. So your list could increase if you look again tomorrow, next week or at the end of the month. You can bump this date range out if you like. However, for District 3 you are only asked to look at and update the next 30 days.

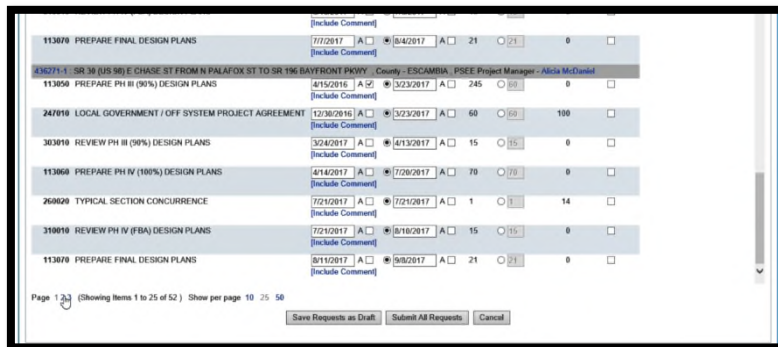
Below the filters are your activities. There is a gray line which contains the project number, project description, county and ProjectSuite project manager. If you click on the ProjectSuite

project manager’s name, their contact information pops up. Among the information provided will be the Project Manager’s email and phone number. If you click on the project number, the project page will open. We will revisit this option in the video on the next slide.

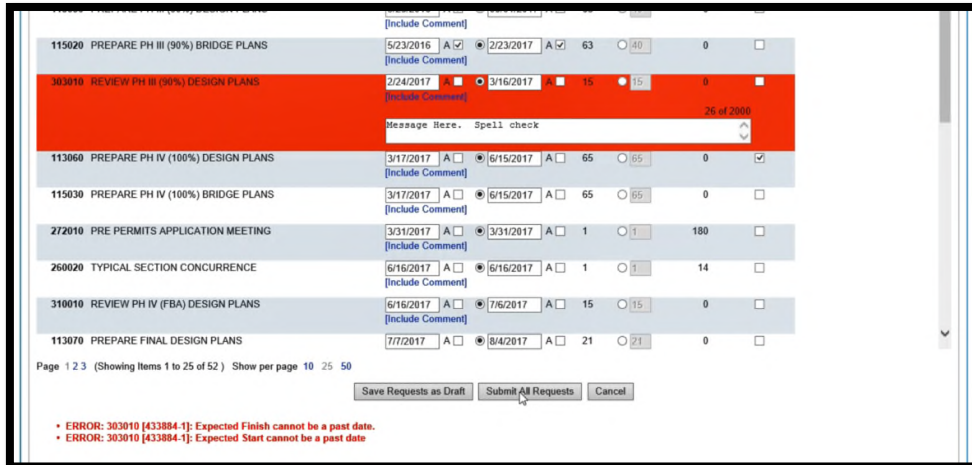


Under the gray line are the activities which are assigned to you for this project. You now will update activities.

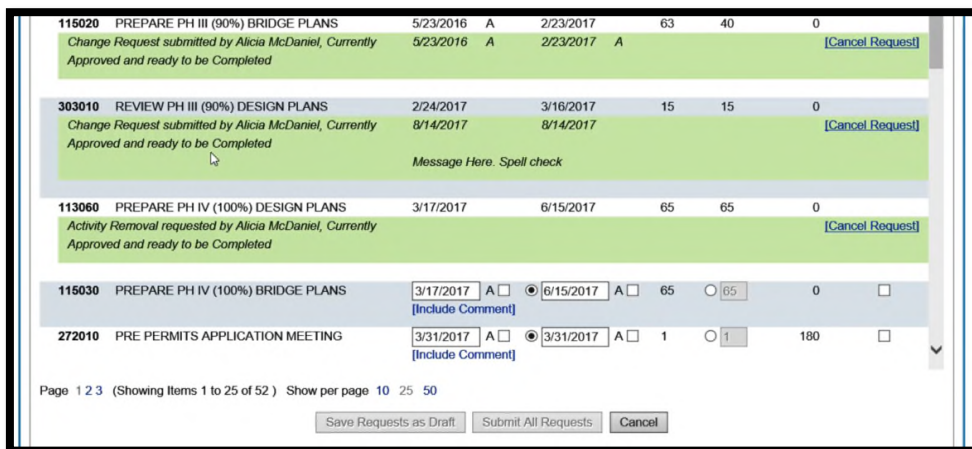
- If you need to change an expected date, click in the date box and pick a new date from the calendar. Or you can type a date in.
- If you have Started or finished an activity, put a checkmark in the box.
- If you just want to leave a comment and have no date to modify. Click “include comment”. A dialog box will open and you can type up to 2000 characters. So, you type your message here. We have spel check pleas use it.
- If you have an activity that does not apply to this project and it needs removed, you put a checkmark in the box under the “Request Removal” column.



Once you have scrolled through the entire page, there are 3 buttons at the bottom of the page. The “save requests as draft” will save your entry but no one else can see them. This is beneficial if you need to step away and revisit later. The “submit all requests” only submits the requests on THIS page. Or “cancel” which will clear everything you just entered. These buttons will be at the bottom of every page. In this example, the user has 3 pages. That means they will need to scroll through an update on all 3 pages. You do have the option to change the number of activities per page. For this demonstration, we will click submit all requests.



These errors were intentional. The errors and their meaning will be explained after the videos. However, if you do get an error or two it is easy to resolve. The project number, activity number and error description is listed for each error at the bottom. When you scroll up, the activities with errors are highlighted red. Make the adjustments. These activities need expected dates in the future. If you remember we didn't know which dates we wanted for the activity with the comment. To satisfy the error, if you don't know a new expected date, use today's date. But do NOT check the actual box because you have not actually done it.

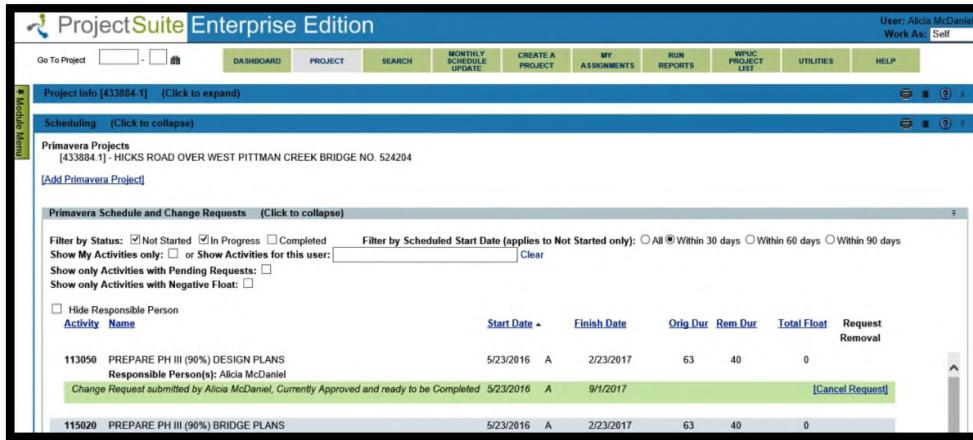


Once all errors are fixed, scroll back to the bottom and click the "submit all requests" button again. The requests will change to a green highlight if the errors were resolved. The message will say the Change Request submitted by YOUR NAME, Currently Approved and ready to be completed. This means the request is now in the scheduler's queue to review and incorporate into Primavera.

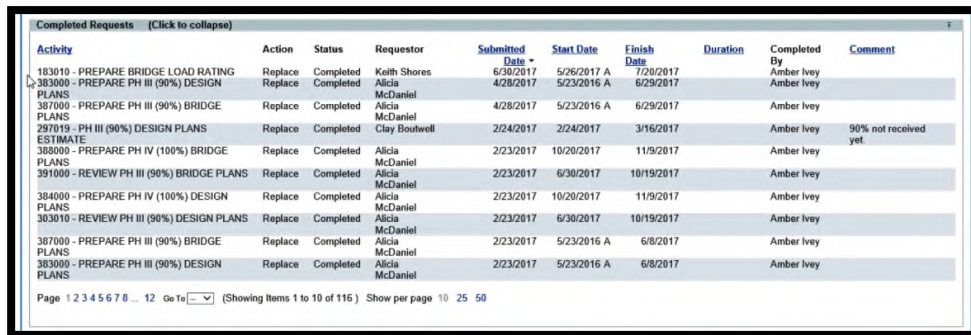
At a glance now you can see on the top of the request what the dates were before you entered your change request. The information in the green highlights (dates or comments) is what you entered as your request. If you see the request needs to be cancelled or modified, click the "Cancel Request" at the end of the line. This removes what was submitted and you set it back.

PROJECT VIEW:

In the global view video, it was mentioned you could click here on the project to see the activities at a project level. Click on the project number and the scheduling module within that specific project to open.



The difference of seeing the activities at a project level is all activities even if they are not yours can be seen. The filtering options are very similar. Here at the project level you can choose to only see your activities. The default is the entire schedule. You can see the responsible person of the other activities as well as any change requests they have entered for their activities.



Another bonus of viewing at the project level is the ability to request a new activity to be added to the schedule. Also at the project level you can see prior requests that were completed. You can sort this list by activity, submitted date, start date, finish date, duration or comment. You can see who the requestor was as well.

The entry of schedule updates, possible errors and buttons are the same at the project level as the global level.

Possible Red Errors

ProjectSuite was programmed to include a few scheduling rules. When a rule is broken, a red error message appears at the bottom of the screen. You have already seen what the system looks like if an error is encountered. Listed here are all possible error messages, their explanation and how to resolve them.

Expected Finish Date CANNOT occur before Expected Start Date. This is saying “An activity cannot plan to finish before it is planned to start.” Verify the dates. For example, you enter the expected finish date of June 4 and the expected start date of June 5. You cannot expect to finish before you plan to start. Correct the error by editing either the start and or finish date you have entered.

Actual Finish Date CANNOT occur before Actual Start Date. This is saying “An activity cannot be finished before it has actually started.” Verify the dates. For example, you enter the actual finish date of January 4 and the actual start date of January 5. You cannot finish before you start. Correct the error by editing either the start and or finish date you have entered.

Remaining Duration CANNOT be less than 1. This is saying “An activity must have at least 1-day of remaining duration.” If the remaining duration was ZERO then you should be finished and have actual dates. Verify the dates. For example, you enter the remaining duration of zero but the activity has an expected finish. You can only have a remaining duration of zero if the activity is complete. Correct either the finish date to be actual if the remaining duration is really zero. OR increase the remaining duration to a number greater than or equal to 1.

An activity with an Actual Start Date MUST have either: Actual Finish Date, Expected Finish Date or Remaining Duration. This error message is saying an activity must have an end. Verify what the activity finish should be and update the finish date or remaining duration.

Expected Date CANNOT occur in the past. This is saying, “Actual Dates occur in the past, future dates are Expected Dates.” If you didn’t meet your “Expected” date yesterday, you need to pick a new “expected” date. That day can be today or any day in the future. Yesterday’s “expected date” is now late and not possible. Verify your date. Most commonly a user will update the date and forgot to click the “A” to make it actual.

Actual Date CANNOT occur in the future. This is saying, “Expected Dates are future dates, Actual Dates occurred in the past.” No one can do an activity in the future. Even with best intentions things such as weather, technology, or illness can happen. The date can be set as expected and then you can return on the day and click the “A” box to make it actual. An actual date can be today or any day in the past. Tomorrow is only a “plan.” Verify your date. Most commonly a user updates the date and accidentally clicks the “A” to make it actual.

Frequently asked questions (FAQs)

Since moving to electronic monthly updates in ProjectSuite in 2012, a list of frequently asked questions related to Monthly Schedule Updates has been created.

QUESTION: ***Can the dates of an activity be any day of the week?*** The answer is no. All activity durations and dates are based on a 5-day work week. Please select only dates Monday thru Friday. There is a calendar feature is built into ProjectSuite.

QUESTION: ***Can I read the comments posted by others?*** The answer is yes. Comments are visible to ANY user who can log into ProjectSuite. Please take the time to read comments. Other users felt the information was important to the project team and they took the time to post them. Remember to be courteous and professional.

QUESTION: ***What if an activity does not apply to this project?*** This happens from time to time. Simply check the box under the “Request Removal” column and explain why the activity should be removed under “Include Comment”.

QUESTION: ***What if an activity is due to start but cannot or has not started yet?*** Even the best laid plans take detours. If you are the responsible person for the activity, update the Start Date to an Expected Start Date and explain briefly why the activity cannot start yet under “Include Comment”. If you don’t know a new Expected Start Date, then use today’s date. If another activity is impacting yours, you may also want to contact the person responsible of the activity.

QUESTION: ***How can I see if my change request(s) have been incorporated into the project schedule?*** There are several ways to know your activities have been incorporated. First, they will appear in the ProjectSuite Scheduling Module under the Completed Requests section. Here is also included the name of the scheduler who completed your request if you have any questions. Second, the incorporated changes are viewable in the project’s ProjectSuite PSM Module.

Recap

This training explained what a schedule update is and its purpose. A walkthrough what is included in the of the Monthly Schedule Update process was illustrated in a flowchart. Video demonstration of how to access to the ProjectSuite application and how a responsible person enters their schedule update at a global level and project level was shown. An explanation of all possible error messages was given and frequently asked questions were answered.

This training will be available for you to revisit as needed. Also, a written transcript of the training, printable slideshow handouts, and the global and project video demonstrations will be published.

For FDOT staff within a FDOT office, these items will be posted to the [Production Management SharePoint](#) site.

For users outside of an FDOT office, these items will be posted to the [Production Management Web](#) Page. Also on our web page you can find other helpful tools such as Project Schedule Submittal Requirements, Standard Schedule Templates, and the D3 Activity Dictionary.

Important Web Addresses

Listed here are all web addresses mentioned during this training.

- Internal ProjectSuite:
<http://fdotwp2.dot.state.fl.us/ProjectSuiteEnterpriseEdition/Pages/Home/Home.aspx>
- Internet ProjectSuite:
<http://fdotxwp02.dot.state.fl.us/ProjectSuite/Pages/Login/LogIn.aspx>
- District 3's Homepage:
<http://dotsd3cpweb01.d3.dot.state.fl.us/>
- District 3's Production Management's Webpage:
<http://www.fdot.gov/designsupport/Districts/D3/default.shtm>
- Production Management SharePoint:
<http://d3sp.dot.state.fl.us/sites/ProgramDevelopment/ProductionManagement/SitePages/Home.aspx>

DISTRICT 3 Help Contacts

Here is our Production Management Team.

Carla Hodges, Program Service Manager
850-330-1257 carla.hodges@dot.state.fl.us

Amber Ivey, Production Manager
850-330-1218 amber.ivey@dot.state.fl.us

Austin Miles, Schedule Analyst
850-330-1215 austin.miles@dot.state.fl.us

Erica Hewett, Technology Project Manager
850-330-1332 erica.hewett@dot.state.fl.us

If you should find yourself with questions or concerns, our staff is here to help.

Thank you for your time.