

Schedule Creation Process – Standard/Flex Design Schedule

Purpose Statement

The purpose of this document is to explain the process of creating a standard design schedule from the Schedule Initiation Form (SIF) through the concurrence process, assigning a letting date, and making a project active in P6.

Definitions

The following definitions have been developed by the Project Management Support Section (PMSS) for P6 coding purposes:

- Standard Project: A MnDOT Let, Design-Bid-Build project.
- Flex Project: A MnDOT Let, Design-Bid-Build Project with an approved Accelerated Letting Date.
- Shelf Project: A MnDOT Let, Design-Bid-Build Project developed up to a district assigned constraint date, then placed on the shelf for future completion.
- Undeveloped Schedule: Is when the schedule shell before any activities have been added.
- Preliminary Schedule: Is when the schedule is being developed by the Project Manager and Project Team.
- Schedule Under Review: Is when the schedule has been developed and is in progress.

Procedure Steps

Schedule Initiation

- 1) The project manager completes the Schedule Initiation Form (SIF)
 - a. Go to the Project Management Support Section website <http://ihub/projectmanagement/pmss.html>. At the bottom under Primavera P6 EPPM you will find the link to the SIF. This is a live document so always go through this website for the most current version. If you copy the SIF and save it to your computer, you may not always be using the most current version of the form.
 - b. Fill out the form completely. This will ensure that all the project information is complete and accurate in P6.
- 2) The project manager emails the completed form to their Project Management Shared Service Center representative (PM SSC).

Undeveloped Schedule: The schedule is now considered an Undeveloped Schedule. The project status code should be set to “planned” and the baseline status code should be set to “undeveloped” (UNDEV).

- 3) The PM SSC builds the schedule per the completed SIF.

Preliminary Schedule: The schedule is now considered a preliminary schedule. The project status code should remain as planned and the baseline status code should be switched from undeveloped to “preliminary” (PRSCH).

- a) The PM SSC sends the preliminary schedule to the project manager.
- b) The project manager reviews the preliminary schedule for accuracy.
- c) The project manager provides the PM SSC with proposed changes that were identified during the preliminary review.
- d) The PM SSC incorporates proposed changes into the schedule.
- e) The PM SSC will provide a revised schedule along with the Activity relationship report, and the Role Review by Activity report.

Schedule Under Review: The schedule is now considered “schedule under review”. The project status code should remain as planned and the baseline status code should be switched to schedule under review (SCHUR).

- 4) The project manager emails the project schedule along with the supporting documentation to the Project Team to review for concurrence or the PM can post the same information on “SharePoint”. **Note:** If posted on “SharePoint” an email will need to be sent to the project team to inform them that the documents are available for review and where they are located.

Please provide the following documents for the project team to review:

- Scoping Document Report
- Project Schedule
- Activity Relationship Report
- Role Review by Activity Report

Please provide a minimum of 2 weeks for review.

Note: Please do not include the SSC in all the schedule review correspondence.

- 5) The project manager gathers comments and then sends one email to the PM SSC that includes all functional group comments.
- 6) The PM SSC incorporates the functional group comments into the schedule, then provides a revised schedule to the project manager.
- 7) **Adding a let date (Must Finish by Date) and making a project active in P6**

When a SIF is initially submitted, the schedule will be constructed without populating the Must Finish by (MFB) Date code. This is so the project manager and program manager can see when a specific project could be delivered. The letting held early finish dates will show the earliest the project could be programmed and achieve successful delivery as the schedule is currently built.

- For single projects added to years 1 through 3 of the STIP - the district should determine when to propose letting the project within the fiscal year and submit a Project Add/Change Request form to the Balanced Letting Coordinator with the proposed date. Once the proposed let date is approved the must finish date will be added to the project by the district SSC Lead.
- For projects entering year 4 of the STIP – this refers to the annual “batch build” of projects for the incoming fiscal year. Once a schedule is built, the Anticipated Finish Date should be filled in with the district’s proposed letting date for the project. As all projects within the proposed year 4 program have schedules being built concurrently, the Balanced Letting Coordinator will review the fiscal year program as a whole, after all schedules are built. P6 will be used to review proposed letting dates and distribution of program

types. No Project Add/Change Letting Date Request forms should be submitted to the Balanced Letting Coordinator for these projects. Once this process has been completed and the Letting dates are approved, the must finish by date will be added by the district SSC Lead.

****Please note****: Shelf projects do not get an approved letting date until the district determines its future completion. The schedules will be marked active once constraint dates are determined by the district.

****Please note****: The SSC can run scenarios for project managers by temporarily adding the MFB date to the project. Once reviewed (and a PDF is printed if requested) the SSC will remove the MFB date until the letting date has been approved. Only the district SSC lead can permanently add or change the MFB date.

- New projects added outside the STIP will be built like other years. Once the project schedule is concurred upon the Anticipated Finish Date should be filled in with the districts proposed letting date. The Must Finish by Date can be added, and the project can be made active prior to review by the Balanced Letting coordinator. Once the project enters the STIP it will become subject to the statewide balanced letting review and the letting date may be moved based on the statewide Balanced Letting criteria.

Schedule Under Review At this point in the schedule building process the schedule is considered schedule under review. The project status code should be changed from planned to active and the baseline status code should remain schedule under review (SCHUR).

Note: The schedule only needs to be concurred upon and **does not** have to have a baseline to be active.

If you have any questions regarding this process, please contact your PMSS representative.

Contact

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