

3.6.5 Progress section

This section allows all at once, define planning and follow-up the progress.

All planning elements have a progress section.

Description of the different sections is grouped by the planning elements that have common fields and behavior.

Progress data are displayed in the same format, but according to the planning element, fields can have another meaning or behavior.

The following sections displayed first a general description of progress data.

Next, description of fields and information in sections will be displayed.

Columns definition

Column “Requested”

- Requested dates allows to define initial dates (wished dates).
- Useful to define preliminary dates in a project, in a change request or other.
- Requested dates can be used:
 - as a first draft of planned dates.
 - with indicators to monitor the respect of start and end dates.

Column “Validated”

- Validated data are used by project leader to define committed dates, work and cost expected.
- Validated data can be used:
 - to fix a limit or a target and for some planning mode they are used to define parameter entries.
 - with indicators to monitor the respect of start and end dates, work and cost expected.
 - like the project’s baseline.

Note: Validated end date (due date)

- The validated end date allows to fix a due date at which the work must be completed.
 - If the work is planned or completed beyond this limit, the error field will be highlighted.
 - For task and milestone, their Gantt element will be red. (See: *Gantt chart view*)
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Column “Planned”

- Planned dates are the estimated time to complete tasks or the estimated end date of milestones.
- Planned dates can be used to initialize validated and requested dates. (See: *Project planning*)

Columns: “planned” and “assigned”

- Assigned work is the planned work assigned to resources for completing tasks.
- Planned dates are the estimated duration to complete tasks by resources according to assigned work.

Column “Assigned”

- This column displays the planned work and cost of resources and the planned project expenses.

Planned work and cost of resources

- Scheduled work time assigned to a resource for completing a task.
- The estimated cost is the scheduled work time assigned to a resource for completing a task multiplied by its current daily cost.

Planned project expenses

- Sum of the planned amount of all project expenses.

Column “Real”

- This column displays the duration, completion date, work done and cost incurred by resources and the project expenses.

Dates

- Allows to determine when a planning element has really begun and completed.

Work done and cost incurred by resources

- Work done by a resource on an assigned task.
- Work done are entered by resources, on a daily basis by real work allocation screen.
- The cost incurred is the work done by a resource on a task on daily base multiplied by its daily cost defined for the period.

Project expenses

- Sum of the real amount of all project expenses.

Column “Left”

- This column displays the remaining of planned work and planned amount.
- > Assigned - Real

Work and cost remaining of resources

- Scheduled work time assigned to resources for completing tasks minus the work done.
- The remaining cost is the remaining work by a resource on a task multiplied by the latest daily cost defined for it.

Project expense

- Sum of the planned amount of project expenses not incurred yet.

Column “Reassessed”

- This column displays the resources work reassess and the spending projection.
- > Real + Left

Work and cost consolidation

Work and cost from tasks (Activity, Test session and Meeting) are summarized for each parent element. Allows to follow-up progress on grouped tasks like phase, delivery, test group, sub-project and project.

Consolidate validated work and cost

- Consolidation can be done on validated work and cost.
- Allows to calculate the scheduled work and budgeted cost from lower planning elements.
- The calculation depends on consolidation method selected and on which level the validated values are entered

Consolidation method “Never”

- Values are not consolidated.

Consolidation method “Always”

- Values on the lower levels are consolidate up to project level.

Consolidation method “Only if set”

- Values at lower levels do not overwrite values on upper level.

Note: Selection of consolidation method

- The parameter “Consolidated validated cost & work” in global parameters screen allows to select consolidation method.
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Monitoring indicator

The indicators can be defined on the progress data.

Project, Activity and Test session.

- Next indicators defined for Project, Activity and Test session

Respect of start or end date for the requested, validated and planned values

- These indicators can be programmed as a reminder and an alert, according to the number of days or hours before the start or end date.

On resource work and cost

- These indicators can be programmed as a reminder and an alert, according to percentage of progress on monitored value compared to the target value.

Reassessed cost compared to validated cost

- The reassessed cost compared to budgeted cost.

Reassessed cost compared to assigned cost

- The reassessed cost compared to planned cost.

Reassessed work compared to validated work

- The reassessed work compared to scheduled work.

Reassessed work compared to assigned work

- The reassessed work compared to planned work.

Real work compared to validated work

- The work done by resources compared to scheduled work.

Real work compared to assigned work

- The work done by resources compared to planned work.

Milestone

- Next indicators defined for Milestone.

Respect of end date for the requested, validated and planned values

- These indicators can be programmed as a reminder and an alert, according to the number of days or hours before the end date.

Progress section (Project, Activity & Test session)

Next sections describe each part of progress section display.

Some parts are used only by a specific planning element.

Parts used by planning elements are:

Project

- *Dates and duration*
- *Resources (Work & Cost)*
- *Expense, Reserve and Total*
- *Progress, Expected, WBS & Priority*
- *Margin*

Activity

- *Dates and duration*
- *Resources (Work & Cost)*
- *Progress, Expected, WBS & Priority*
- *Planning mode*
- *Ticket*

Test session

- *Dates and duration*
- *Resources (Work & Cost)*
- *Progress, Expected, WBS & Priority*
- *Planning mode*

Dates and duration

Requested

- Allows to define preliminary planned dates.

Validated

Validated dates are used to:

- Define entry parameters according to selected planning mode.
- Define initial planned dates.
- Fix a due date at which the work must be completed.

Planned

Planned dates can be defined with:

Requested or validated dates

- The planned dates can be initialized with validated dates or requested dates (whether validated dates are not specified).

Planning calculation

- The planned dates can be determined during the planning calculation.
- The planning calculation is done according to tasks assigned to resources and their predecessors.

Note: Planning mode “Fixed duration”

- The planned dates of tasks will be calculated depending on their predecessors and their specified duration.
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Planned dates of parent element

- At parent element level, dates are adjusted with the first planned start date and the last planned end date from all sub-elements.

Note:

- The planned start date is adjusted to the real start date when work began.
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Real

- The real start date is set when work began (handled).
- The real end date is set when no more remaining work (done).

Real dates of parent element

- The real start date will be propagated to parent elements until project.
- The real end date for parent element will be initialized, when all sub-element have been completed.

Resources (Work & Cost)

Work of resources are calculated by the work assigned to each resource for tasks.

Validated

- Allows to define scheduled work and budgeted cost of resources.

Work

- This value is used for calculation of the expected progress and project margin (work).

Cost

- This value is used for calculation of project margin (cost).

Note: Project

- The values of work and cost can be initialized with the sum of total work and amount of all project orders.
 - See: *Orders*
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Assigned

- Sum of planned work assigned to resources and estimated cost.

Real

- Sum of work done by resources and cost incurred.

Left

- Sum of planned work and cost remaining.

Reassessed

- Sum of resource work needed to complete the work and the cost.

Work on tickets

- Sum of work done on tickets and costs is included in work of activity linked.
- Sum of work done on tickets that don't link to any activity will be integrated in the work of the project.

Expense, Reserve and Total

> Used by: Project

Validated (Expense)

- Allows to set the budgeted cost of project expenses.
- This value is used for calculation of project margin (cost).

Assigned (Expense)

- Project expenses planned.

Real (Expense)

- Project expenses committed.

Left (Expense)

- Project expenses not committed yet.

Reassessed (Expense)

- Spending projections.

Left (Reserve)

- Project reserve.

Note: Total columns

- Total is the sum of resources cost, expenses and reserve of their corresponding column.
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Progress, Expected, WBS & Priority

Progress

- Percentage of actual progress.
- Calculated by the sum of the work done divided by sum of work reassessed.

Expected

- Percentage of expected progress.
- Calculated by the sum of the work done divided by scheduled work.

WBS

- Hierarchical position in the global planning.

Priority

- Allows to define priority in the planning.
- By default, the value is set to “500” (medium priority).
- See: *Planning priority*.

Planning mode

> **Used by: Activity & Test session**

As soon as possible

- The task is planned to finish as soon as possible.

Work together

- When two or more resources are assigned to the same task, planning tries to find periods where all resources are available to work together.

Constraint by date

** The validated start or end date field must be set.

Must not start before validated date

- The task must not begin before a specific date.

As late as possible

- The task is planned from end to start.

Recurrent activities

- Allows to evenly distribute work between two dates.
- Used for management recurrent activities.
- The validated dates fields must be set.

Note:

- Examples of the planning modes upcoming are based on 2 work days to plan on 10 days.
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Regular between dates

- Work will be evenly divided between on working days.
- For instance, 0.2 days during 10 days.

Regular in full days

- Work will be distributed on full day between on working days.

Day	1	2	3	4	5	6	7	8	9	10
Distribution	0	0	0	0	1	0	0	0	0	1

Regular in half days

- Work will be distributed on half of the day between on working days.

Day	1	2	3	4	5	6	7	8	9	10
Distribution	0	0	0.5	0	0.5	0	0	0.5	0	0.5

Regular in quarter days

- Work will be distributed on one quarter of the day between on working days.

Day	1	2	3	4	5	6	7	8	9	10
Distribution	0	0.25	0.25	0.25	0.25	0	0.25	0.25	0.25	0.25

Fixed duration

- The task is planned by duration.
- The task is “floating” depending on predecessors.
- The validated duration field must be set.
- Has the same behavior as “As soon as possible”. Except it is not necessary to assign resources to the task.

Note:

- If you want fixed duration with fixed start, use “Regular between dates”, or use milestone to define start.
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Margin

> Used by: Project

Displays remaining margin.

Note:

- The percentage of remaining margins will be displayed on the right.

Margin (work)

- Calculated by the scheduled work minus the sum of work reassessed.

Margin (cost)

- Calculated by the budgeted cost (resource & expense) minus the total of reassessed cost.

Ticket

> Used by: Activity

Allows tracking of tickets attached to the activity.

Field	Description
Number	Number of tickets attached to the activity.
Estimated	Sum of estimated work for tickets attached to the activity.
Real	Sum of work done for tickets attached to the activity.
Left	Sum of remaining work for tickets attached to the activity.

Field: Estimated

- This field will be highlighted when the sum of estimated work on the tickets is higher than the planned work on the activity.

Field: Left

- This field will be highlighted when the sum of remaining work on the tickets is higher than the remaining planned work on the activity.

Show tickets attached

- Click on  to show ticket list attached to the activity.
- Click on a ticket name to directly move to it.

element	name	status
Ticket #1	Ticket 1	recorded
Ticket #2	Ticket 2	recorded

Fig. 3.45: List of tickets dialog box

Progress section (Milestone)

This section allows to define planning and follow progress on a milestone.

Requested

- Allows to define the initial due date for the milestone.
- Have no impact on planning.

Validated

- Allows to define the due date at which the milestone must be completed.

Planned

- Defined according to the selected planning mode.

Fixed milestone

- Planned due date is the value from validated due date field.

Floating milestone

- Calculation of planned due date takes into account dependencies with tasks.

Real

- Determined when the status of the milestone is “done”.

WBS

- Hierarchical position of the milestone in the global planning.

Planning mode

- Fixed milestone
- Floating milestone

Progress section (Meeting)

This section allows to define priority and follow progress on a meeting.

Validated

- Allows to define scheduled work and budgeted cost.
- Used to consolidate validated work and cost to the project.

Assigned

- Sum of planned work assigned to attendees and the planned cost.

Real

- Sum of work done by attendees and the cost.

Left

- Sum of planned work remaining and the remaining amount.

Priority

- Allows to define meeting priority in the planning.
- By default, the value is set to “1” (highest priority).
- See: *Planning priority*.