

Commonwealth of Virginia



Virginia Department of Transportation (VDOT)

Project Management Office

Schedule User Guide

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View Schedule

Schedule is a separate application, however; it is tightly-coupled with iPM and the Project Pool; and is divided into a view page and an edit page.

The view page for the Schedule application  **SCHEDULE** lists all of the tasks associated with a project.

Immediately below the page header is the Search bar. From here the user can navigate to a project search screen or jump to the schedule page for another UPC.



Figure 1: Search Bar

Below the Search bar is an Application bar. This bar allows the user to navigate to the detail/view page for the current UPC in any of the applications listed.

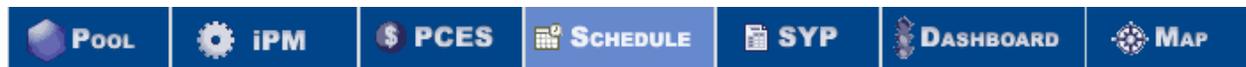


Figure 2: Application Bar

Below the Application bar is the Summary section. The Summary section displays basic information about the current project. This includes a button to download the schedule to a Microsoft project file.

Summary			
Description	RTE 168 (CAMPOSTELLA CONNECTOR) - 4 & 6 LANES		 Download Project File (req's Microsoft Project)
State Project #	0168-131-F04	UPC 1945	

Figure 3: Summary Section

- Description..... A textual narrative briefly describing the project (for quick identification and reference purposes)
- State Project # The state project number is 10 alphanumeric characters long, with a format of XXXX-XXX-XXX (Route, County/City, Section).
- UPC..... The identification numbers the FMSII system assigns to projects. This number is used across the enterprise to identify projects. It is unique to the project, and will never be assigned to any other project.

The Task List portion of the page lists all of the tasks associated with the current project. Late tasks are shown in red text. Users can click on a row to show/hide the “Comment” and “Function” associated with the record. If the user has the appropriate permissions, a blue ‘e’ (edit) icon will appear on the task list bar. Selecting the edit icon will open an edit page that allows the user to manage the schedule.

Task List 				
Task	Planned Start	Actual Start	Planned Finish	Actual Finish
AUTHORIZE PE	09/03/1986	09/01/1973	09/07/1986	09/30/1973
BEGIN PROJECT DESIGN/STUDIES	09/07/1986	09/01/1973	09/21/1986	09/30/1973
SCOPE PROJECT	08/01/1979	08/01/1979	08/30/1979	02/19/1986
SCOPING TEAM MEETING DATE	02/19/1986	02/18/1986		
FURNISH ENV TRAFFIC DATA	02/15/1988	01/19/1988	04/23/1988	04/05/1988
ENVIRONMENTAL PERMITS	04/15/1988	09/25/1986	04/30/1988	09/26/1986
DRAFT ENV. DOCUMENT OR CATEGORICAL EXCLUSION (CE)	01/04/1988	11/17/1987	11/30/1988	12/07/1988
Comment	DRAFT EA SIGNED BY FHWA ON 12/7/88			
Function	ENV - ENVIRONMENTAL			
CONDUCT LOCATION SURVEY	04/17/1987	04/17/1987	11/30/1987	12/15/1987
FINAL ENVIRONMENTAL DOCUMENT	02/01/1989	02/14/1989	09/30/1991	07/17/1991
FURNISH SOILS SURVEY	03/01/1980	03/01/1980	07/30/1980	02/15/1991
PLAN DESIGN/FIELD INSPECTION	02/15/1988	02/19/1986	07/31/1988	08/22/1988
PLAN DESIGN TEAM MTG DATE	07/28/1988	07/28/1988		

Figure 4: Task List Section

Task..... Description of the task
 Planned Start Planned start date
 Actual Start Actual start date
 Planned Finish..... Planned finish date
 Actual Finish..... Actual finish date

Manage / Edit Schedule

Users with appropriate permissions may manage certain aspects of the schedule using the manage/edit schedule function of iPM.

Controlled Tasks or Phase Authorizations

In the edit screen tasks in bold are controlled. These controlled tasks are phase authorizations that are directly linked to the programming schedule and affect the funding for a project. Only the finish date for controlled tasks is linked to the programming schedule in the Project Pool. The finish date for Task 12 is associated with the PE phase start date in the Project Pool. The finish date for task 52 is associated with the RW phase start date in the Project Pool. The finish date for task 80 (advertisement date) is associated with the CN phase start date in the Project Pool.

Changes made to the planned finish date for controlled tasks will result in a revision request being created (unless the revision meets one or more of the exception rules as established by Programming Division in the Project Pool). When a revision request is necessary, the user must submit the request and have it approved before the change will be completed. While a revision request is pending approval, the user will see the original value for the task in gray along with the proposed value for the task.

Task	Planned Start	Actual Start	Planned Finish	Actual Finish	
12 AUTHORIZE PE	6/20/2006		6/21/2006 6/20/2006		

Figure 5: Phase Authorization Tasks

Users cannot add or delete controlled tasks from the schedule using the manage/edit schedule screen. Controlled tasks are automatically added or deleted from the schedule only when the appropriate “Has Phase” indicator is checked/unchecked in the Project Pool.

Adding Tasks

Only the Project Manager and District PMO may add tasks to a project. Users with those roles will see an add tasks  icon at the bottom of the page.

80 ADVERTISE PROJECT/BEGIN CN	7/30/1996	7/30/1996	8/13/1996	8/13/1996	
91 ADMINISTER CONTRACT	11/14/1996	11/14/1996	4/7/1999	4/7/1999	
93 PROCESS CLAIMS	<input type="text"/>		<input type="text"/>		
Comment	<input type="text"/>				
Function	<input type="text"/>				
<input type="button" value="Finish"/>					

Figure 6: Add Tasks

1. Select the task from the drop-down.
2. Indicate a **Planned Start** date and a **Planned Finish** date by clicking the calendar  button (these are required fields).

	<p><i>Note:</i> X tasks only have a start date; they always start and end on the same day</p>
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3. Input a comment if needed.
4. Select the function corresponding to the selected task (this is a required field).
5. Click on the add  button.

If no function is selected, the new task will not be added. An error message will appear and a yellow caution symbol will show up in the function label.



The dates entered are also validated. In order for the new task to be added the dates must:

- Exist
- Be formatted MM/DD/YYYY
- Planned finish cannot be less than planned start.

If any of these conditions are not met, an error message will be displayed on the top of the page.

Manage Tasks For UPC 90314							
Error: Planned start and finish are required for new tasks.							
Tasks							
Task	Planned Start	Actual Start	Planned Finish	Actual Finish			
12 AUTHORIZE PE	07/08/2008		07/08/2008				
18 SERP-NOTICE TO STATE AGENCIES	07/09/2008		11/09/2008				
22 SCOPE PROJECT	08/07/2008		12/07/2008				
24 ENVIRONMENTAL PERMITS	07/09/2008		12/09/2008				
79 CN AUTH OR ADV FUNDING REVIEW	01/10/2009		04/25/2009				
80 ADVERTISE PROJECT/BEGIN CH	02/24/2009		02/24/2009				
34F FINAL SOILS SURVEY	08/01/2008 						
Comment	<input type="text"/>						
Function	MATERIALS						
<input type="button" value="Finish"/>							

Figure 7: Manage Tasks

iPM Schedule/RUMS Tasks Interface

The Project Manager, Right of Way and Utilities Team Members should communicate early during project development and throughout the development phase to ensure the appropriate

Right of Way and Utilities tasks are included in the iPM Schedule. The appropriate tasks should be in the Schedule before R/W work begins.

The matrix below is provided to show the relationship of the iPM Schedule and RUMS interface and provides a list of Right of Way related tasks that should be included in the iPM Schedule by the Project Manager when certain conditions exist. Examples of the existing conditions are:

- Utility Field Inspection Meeting (43X) is required on any project that has a Utility Field Inspection
- Notice to Proceed – Partial Takes (60P) is needed on any project that requires a Notice to Proceed (NTP)

The interface will apply the RUMS actual date to the appropriate iPM Schedule task unless the actual date has been entered previously. *RUMS will not overwrite an existing Schedule date.* RUMS will not populate an Actual Finish date to iPM unless the Actual Start date already exists in the iPM Schedule. The iPM Schedule and RUMS interface process occurs overnight, dates entered in RUMS will populate the iPM Schedule the next day.

iPM Schedule Task Description	RUMS Transaction Description	Actual Dates Entered By	Relationship with other Tasks
Utility Field Inspection Meeting (43X)	Utility Field Inspection Date	District Utilities Staff enters Actual Start Date in RUMS	iPM Schedule (Actual Date) automatically populated from RUMS
Notice to Proceed – Partial Takes (60P)	Notice to Proceed Date – Partial	Actual Start Date migrates from Actual Finish date for Furnish Approved R/W & UTL. Plans (51) or Authorize R/W & UT Funds (52), whichever is greater. Central Office R/W staff enters Actual Finish date in RUMS	Triggers Actual Start Date for 67C, 67D, 69 & 73. RUMS will populate iPM Schedule if activities exist. If no 60P is in the Schedule, Actual Start dates for any of the above activities must be entered directly in the iPM Schedule. Actual Finish date automatically populates iPM Schedule from RUMS
Notice to Proceed – Total Takes (60T)	NTP Date for Total Takings	Central Office R/W Staff enters Actual Finish date in RUMS	Actual Start date is migrated from Actual Finish date of 51T or 52T (whichever is greater). Actual Finish date automatically populates iPM Schedule from RUMS

iPM Schedule Task Description	RUMS Transaction Description	Actual Dates Entered By	Relationship with other Tasks
Clear Utility Agreement Central Office (67C)	Clear Utility Agreements (Central Office)	Central Office Utilities Staff enters Actual Finish date in RUMS	RUMS transaction occurs when the last “Adjustment Plans sent to Location & Design” date is entered in RUMS. Actual Finish date automatically populates iPM Schedule from RUMS
Clear Utility Agreement District (67D)	Utility Agreements (District) Date	District Utilities Staff enters Actual Finish date in RUMS	RUMS transaction occurs when the last “Approved to Begin Adjustment” date is entered in RUMS. Actual Finish date automatically populates iPM Schedule from RUMS
Utility Relocations (67U)	Utility Relocations by Owners	District Utilities Staff enters Actual Start and Finish dates in RUMS	RUMS transaction occurs when the “Approved to Begin Adjustment” date is entered in RUMS for the first utility on the project. Actual dates automatically populate iPM Schedule from RUMS.
Railroad Agreements (68)	Railroad Agreement Date	Rail Agreement Section (SCD) enters Actual dates in iPM Schedule	
Acquire Right of Way (69)	Acquire Right of Way	District R/W Staff enters Actual Start and Finish dates in RUMS	RUMS transaction occurs when “Parcels Clear” date is entered in RUMS; iPM Schedule automatically populated from RUMS
Right of Way Certification (69X)	R/W & Utilities Certification Date	Central Office R/W Staff enters Actual Start date in RUMS	iPM Schedule automatically populated from RUMS
Process Relocations (73)	R/W & Utilities Certification Date	Central Office R/W Staff enters Actual Finish date in RUMS	iPM Schedule automatically populated from RUMS

Figure 8: iPM/RUMS Relationship Matrix

Editing Tasks

Tasks can be edited by clicking on the corresponding edit ‘e’ icon. This will refresh the page and display the selected task in an editable format with a save and cancel icon in place of the edit icon.

22 SCOPE PROJECT	08/07/2008		12/07/2008		 
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Planned dates can only be edited by the Project Manager and District PMO.

Team members can supply actual dates, modify the comment, and modify the function associated with a task for their respective function area only. Team members must be included in the iPM ‘Team’ list and have the appropriate function area identified in order to edit the above listed items on the Schedule. To input an actual date, the user enters the date in the corresponding actual date field. The date is saved when the user selects the save icon.

Note: The input of an actual date locks the planned date against editing.

22 SCOPE PROJECT	08/07/2008	05/16/2008	12/07/2008		 
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Deleting Tasks

Tasks can be deleted by clicking on the gray (-) icon. Controlled tasks, ERP, Scoping, Environmental Permits cannot be deleted. Tasks with actual dates must have the respective actual dates deleted by the Project Manager or Team Member before the (-) icon will be available; and only then can the task be deleted by the Project Manager.

Task	Planned Start	Actual Start	Planned Finish	Actual Finish		
18 SERP-NOTICE TO STATE AGENCIES	02/07/2008	02/14/2008	05/01/2008	03/11/2008		
22 SCOPE PROJECT	09/18/2009	09/18/2009	11/30/2009			
22X SCOPING TEAM MEETING DATE	09/18/2009	08/12/2009				
24 ENVIRONMENTAL PERMITS	02/07/2008	02/07/2008	05/01/2008	03/03/2008		
25 DRAFT ENV. DOCUMENT OR CATEGORICAL EXCLUSION (CE)	03/11/2008	03/11/2008	08/11/2008	03/12/2008		
69X RW/UTILITY CERTIFICATION DATE	07/09/2010					
71 APPROVED CONSTRUCTION PLANS	04/09/2010		07/01/2010			
71C PAC CONSTRUCTABILITY REVIEW	02/18/2009		03/10/2009			
71X PRE-ADV CONFERENCE DATE	03/10/2009	08/12/2009				
72 PREPARE FOR ADV	04/13/2010		07/09/2010			
72B BIDDABILITY REVIEW	05/19/2010		06/15/2010			
79 CN AUTH OR ADV FUNDING REVIEW	04/10/2009		11/23/2009			
80 ADVERTISE PROJECT/BEGIN CN	08/10/2010		08/10/2010			

Appendix A – Business Dictionary

Term	Definition
Actual Finish.....	Actual finish date
Actual Start	Actual start date
Description.....	A textual narrative briefly describing the project (for quick identification and reference purposes)
District.....	The primary construction district responsible for a project.
District PMO.....	District Office Project Management Office
Planned Finish.....	Planned finish date
PMO.....	Central Office Project Management Office
Route	The Route number of the road where the project will take place. This value is used in determining the state project number
State Project #	The state project number is 10 alphanumeric characters long, with a format of XXXX-XXX-XXX (Route, County/City, and Section).
Task.....	Description of the task
UPC.....	The identification numbers the FMSII system assigns to projects. This number is used across the enterprise to identify projects. It is unique to the project, and will never be assigned to any other project.

Appendix B – Page to Source of Input Table

Group Name	Field Name	Source of Input
	Description	pool
	District	pool
	Route	pool
	State Project #	pool
	UPC	pool
Summary	Description	pool
Summary	State Project #	pool
Summary	UPC	pool
Task List	Activity Owner	pool
Task List	Actual Finish	pool/CEDAR/RUMS
Task List	Actual Start	pool/CEDAR/RUMS
Task List	Planned Finish	pool
Task List	Planned Start	pool
Task List	PPMS Code	pool
Task List	Task	pool

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Project	1, 6	controlled	3
District.....	6	deleting.....	5
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