Checklist for Schedules as Project Forecast Models

This checklist will be used for the '*Forecast Scheduler*' certification process administered by ProjectPro Corporation. There are three levels of *Forecast Scheduler* certification using the checklist for *Project Forecast Models*:

1. *Time Modeler:* total of 49 checks from our 86-point checklist
2. *Workload Modeler:* total of 75 checks from our 86-point checklist
3. *Cost Modeler:* all 86 checks

This document contains all checks for the level of ***'Workload Modeler'***. You can certify yourself as a **'*Forecast Scheduler – Workload Modeler*'** if you: Submit a project schedule that you created yourself AND the schedule passes all Must-Have checks from the checklist below.

MUST-HAVE means that the check has to be met for the project schedule to be approved and certified by ProjectPro. There are **75 Must-Have checks** in this checklist for **Workload Modeling** (excluding section 1 background questions). All Must-Have checks need to pass in order for you to attain the **'*Forecast Scheduler – Workload Modeling*' Certificate of Competence** from ProjectPro.

You can choose the project schedule to submit yourself and these are the hard requirements for the project schedule you select:

- The schedule can be a work-related schedule (preferred) or a private schedule (e.g. building a deck, your wedding, etc.).
- The schedule that you submit needs to have at least 50-line items that you created yourself (in addition to the line items that came with the template you may have used).

This is the complete process for certification:

1. We recommend that BEFORE you submit your project schedule to us for evaluation, you first ask a colleague to critically review your schedule using *ProjectPro Forecast Scheduling Application (PFSA)* and using this checklist. PFSA is the add-in that we will use to evaluate your schedule and that we made available to you as well. This peer review will improve the chance that your schedule will pass on your first attempt that you paid for.
2. Please sign the signature page (see separate PDF-file) in handwriting and scan it into a PDF-file, then answer in typewriting the questions in Chapter 1 of this checklist

(See separate MS Word file). Submit the two files with your project schedule to: Sales@ProjectProCorp.com

3. You should receive an immediate reply that your submission was received and that it is complete.
4. ProjectPro will perform ONE schedule evaluation and create a detailed, schedule-evaluation report on your project schedule.
5. You will receive our detailed evaluation report from your auditor at ProjectPro Corporation. If you bought the optional one-hour, online, live schedule review of your project schedule, your auditor will contact you to schedule the session.
6. If your schedule passes on the first attempt, you will receive the '*Forecast Scheduler*' Certificate of Competence.
7. If your project schedule does not pass on your first attempt, and you still want to attain our certificate, you will need to buy a second schedule evaluation from ProjectPro, which will cost you USD $185 for just the detailed schedule evaluation report OR it will cost USD $385 for the detailed report plus a one-hour live review of your project schedule with your schedule auditor. You can buy this extra schedule evaluation online at www.ProjectProCorp.com under **Certification**.
8. If your schedule passes on the second attempt, you will receive the same '*Forecast Scheduler*' Certificate of Competence.
9. If your schedule does not pass on the second attempt, the payment and the process for the third attempt, if desired, are similar as for your second attempt, etc.

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Checklist for Project Forecast Models

For more information on each check, please refer to the textbook *Forecast Scheduling with Microsoft Project*.

The checklist below starts with a section of questions to gather important background information on the project schedule; we have labeled this section as chapter 1.
The answers to these questions are needed to perform a comprehensive evaluation of the project schedule.

We have numbered all checks so you can more easily refer to a specific check when working with us and your colleagues. Our *ProjectPro Forecast Scheduling App* can help you perform these checks and also help you improve your schedule (see *www.ProjectProCorp.com* under **Software** for more info). We recommend you run your schedule through PFSA before submitting it to us.

Tip ▶ You can install the free, 30-day evaluation version of PFSA on your private computer (if your computer configuration at work is locked).

Tip ▶ In the checklist, we have used the words "*summary task*" and "*detail task*" very carefully. A *summary task* is any task with subtasks indented and listed beneath it.
A *detail task* is any task without indented subtasks in the WBS. It is important that these words are used with these meanings for checks to make sense.

Chapter 1 Background Information about your Project

We need to know the answers to these questions in order to make a thorough evaluation of your schedule:

1.1 MUST-HAVE: The schedule should be a detailed schedule or subproject schedule (not a high-level schedule, master schedule**,** or template schedule).

1.2 MUST-HAVE: What is the objective or final product of your project?

…….

1.3 MUST-HAVE: Deadline date of your project: ……..

1.4 NICE -TO-HAVE: Does your project have a cost budget? If yes, how much?

……..

1.5 MUST-HAVE: Does your project have a person hour budget (effort)?
If yes, how many:

……

1.6 MUST-HAVE: Did the project manager gather pure work time estimates or gross work time estimates?
- ❍ pure work time estimates
- ❍ gross work time estimates

1.7 MUST-HAVE: Did the project manager apply the rolling wave approach in the schedule? Yes/No
If so, what is the duration of the detail planning window? ……...

1.8 MUST-HAVE: Will the project manager update tasks (task fields **Duration** or **Work**) or update assignments (using timesheets) or both (not recommended)?

1.9 MUST-HAVE: How many hours does a full-time resource work as per the standard labor contract in your organization? …… hours per week

1.10 MUST-HAVE: Does your project have resources working in more than one country? If so, in which countries:

……

Chapter 2 Checks on Setting Up a Project

2.1 NICE-TO-HAVE Does your schedule contain a succinct project objective?

2.2 MUST-HAVE Do business days, working hours and holidays (national and corporate) on the project calendar align with a typical, full-time resource on the project?

2.3 MUST-HAVE Do working hours on the **Standard (Project Calendar)** (ribbon **Project**, button **Change Working Time**) correspond to option **Hours per day** (ribbon **File**, item **Options,** tab **Schedule)**?

Chapter 3 Checks on the WBS

3.1 MUST-HAVE Are there deliverables in the task list?

3.2 MUST-HAVE Is the list of deliverables *complete*, but *lean*?

3.3 MUST-HAVE Is the breakdown orientation of the WBS *deliverable-oriented*?

3.4 MUST-HAVE Does the WBS have a *logical hierarchy*?

Is the WBS a hierarchy? Apply these checks:

3.4.1 MUST-HAVE Is the WBS an indented list with multiple hierarchical levels instead of one long list without structure?

3.4.2 MUST-HAVE Are the most important items on the highest levels in the WBS?

3.4.3 MUST-HAVE Does each summary task have at least two subtasks?

Is the WBS hierarchy also logical? Apply these checks:

3.4.4 MUST-HAVE Is there no duplication or logical overlap between deliverables?

3.4.5 MUST-HAVE Does each group of sub items capture all work of its summary item (top-down check)?

3.4.6 MUST-HAVE Does each lowest-level item logically relate to all of its higher-level items (bottom-up check)?

3.4.7 MUST-HAVE Is feature ☑ **Project Summary Task** on ribbon **Format** of the Gantt chart used instead of a physical project summary task?

3.5 MUST-HAVE Is there at least one *milestone* for each deliverable?

3.6 MUST-HAVE Are the WBS elements properly formulated?
If you use the following guidelines you will ensure that everybody can understand the WBS:

3.6.1 MUST-HAVE Deliverables are formulated using a *noun* (perhaps with an adjective, but without a verb).

3.6.2 MUST-HAVE IF ACTIVITIES PRESENT Activities (detail tasks) are formulated using a *present tense* verb except for *fixed duration* tasks with no resource assigned (like *backing up server*) or a group of resources assigned (like *training*), which can have the *–ing* ending.

3.6.3 MUST-HAVE Milestones are formulated using the noun of the deliverable and a verb in *past perfect tense* (which typically has an *-ed* ending in English). Instead of a verb, the words *ready*, *complete* or *sign-off* can be used.

3.7 MUST-HAVE Are the names of the deliverables, tasks and milestones used consistently in the WBS?

3.8 MUST-HAVE Does the WBS have enough *detail*?

3.9 MUST-HAVE Does the WBS have too many items, too much detail?

3.10 MUST-HAVE Is the WBS clear to all project stakeholders?

3.11 MUST-HAVE Do project management overhead tasks, if present, cover the entire duration of the project?

3.12 MUST-HAVE Are task bar splits in the schedule kept to a minimum during the *planning* phase of the project?

Chapter 4 Checks on the Estimates

4.1 MUST-HAVE Do all detail tasks have an estimate?

4.2 MUST-HAVE Are estimates that you collected consistent with working hours entered in the **Standard (Project Calendar)**?

4.3 MUST-HAVE Are the *estimates* reasonable given the work that needs to be performed?

4.4 MUST-HAVE Is the amount of effort on overhead tasks reasonable compared to the total amount of effort (Work) in the project?

Chapter 5 Checks on the Network of Dependencies

Is the Network of Dependencies Complete?

5.1 MUST-HAVE Have you turned field **Task Mode** for all linked tasks to **Auto Scheduled**?

5.2 MUST-HAVE Is the logic set only on detail tasks (activities/milestones) and not on summary tasks?

5.3 MUST-HAVE Are all the starts of the detail tasks (activities and milestones) linked to at least one other detail task?

5.4 MUST-HAVE Are all the ends of the detail tasks (activities and milestones) linked to at least one other detail task?

5.5 MUST-HAVE Do you have tasks with *Start-to-Start (SS) dependencies* in field **Successors** properly linked up?

5.6 MUST-HAVE Do you have tasks with *Finish-to-Finish (FF) dependencies* in field **Predecessors** properly linked up?

Is the Network of Dependencies Correct?

5.7 MUST-HAVE Do all tasks have a reasonable amount of *Total Slack*?

5.8 MUST-HAVE Are there no circular dependencies?

5.9 MUST-HAVE When a change is entered into the schedule, does it update the rest of the schedule automatically and appropriately through dependencies?

Is the Network of Dependencies Simple Enough?

5.10 MUST-HAVE Are there dependencies that leapfrog each other?

5.12 NICE-TO-HAVE Can you, as project manager, explain the network to your project team?

5.13 MUST-HAVE Does the Resulting High-Level Schedule Make Sense?

5.14 MUST-HAVE Have you turned off *Autolink* after checking the network?

Chapter 6 Checks on Deadlines, Constraints and Task Calendars

6.1 MUST-HAVE Is the project deadline date captured in the schedule?

6.2 MUST-HAVE Are deadlines used to capture target dates on milestones that are promised to clients? Are deadlines used to capture dates agreed-upon with team members?

6.3 MUST-HAVE When task calendars are used, are they used to create *windows of opportunity* to schedule certain tasks?

6.4 MUST-HAVE Does the schedule have as few *constraint dates* as possible?

Chapter 7 Checks on the Resources

7.1 MUST-HAVE Are all resources identified in the Resource Sheet?

7.2 MUST-HAVE Are all resources named consistently using a naming convention like *<first name> <last name>* or *<last name>-<first name>*?

7.3 MUST-HAVE Are there no overlaps between resources or duplication of resources?

7.4 MUST-HAVE Is the availability of the resources appropriately modeled?

- 7.4.1 MUST-HAVE Does the availability of individuals not exceed 48 hours per week in working times on resource calendar, or 120% in resource field **Max Units (**or in **Resource Availability** profile in dialog **Resource Information**, tab **General)**?
- 7.4.2 MUST-HAVE If the **Max Units** of individuals are less than 100%, is there a valid reason?
- 7.4.3 MUST-HAVE Are the working times on the resource calendar appropriate?

7.4.4 MUST-HAVE Are vacations of individual resources (not generic resources!) captured in their resource calendar?

7.4.5 MUST-HAVE If project resources are located and working in multiple countries, are base calendars created for each country? Do all resources have the proper country calendar entered in their field **Base Calendar**?

7.5 MUST-HAVE Do all resources have their **Type** field set right?

7.6 NICE-TO-HAVE Are the rates entered in appropriate fields?

7.7 NICE-TO-HAVE Is the cost scheduled when it will occur?

Chapter 8 Checks on Assignments

8.1 MUST-HAVE When the project is still in the planning phase, are you using task-related field **Type** for **Auto Scheduled** activities?

8.2 MUST-HAVE Is **Effort Driven** off for **Fixed Duration** and **Fixed Units** tasks (**Auto Scheduled**)?

8.3 MUST-HAVE Are there no assignments on summary tasks?

8.4 MUST-HAVE Do all activities have a human resource assigned?

8.5 MUST-HAVE Do activities have just one human resource assigned?

8.6 MUST-HAVE Are workloads on long, elapsed duration tasks reasonable?

Chapter 9 Checks on the Optimized Schedule

Optimizing Resource Workloads

9.1 MUST-HAVE Is the total effort within the person hour budget of the project (if a person hour or person day budget is available)?

9.2 MUST-HAVE Are the workloads for the resources reasonable?

9.2.1 MUST-HAVE On a day-by-day basis, the workload for individuals should not exceed 150% of their regular capacity (i.e., maximum of 12 hours per day for a fulltime resource). Capacity is working hours * **Max Units**.

9.2.2 MUST-HAVE On a week-by-week basis, the workload for individuals should not exceed 120% of their regular capacity (i.e., maximum of 48 hours per week for a fulltime resource). Capacity is working hours * **Max Units**.

9.2.3 MUST-HAVE The workload of generic *team resources* should not exceed their capacity.

9.2.4 MUST-HAVE The workload for facilities and machines should be within their capacity.

Optimizing Costs

9.3 NICE-TO-HAVE Is total cost within the budget of the project (if a cost budget is available)?

Optimizing Time

9.4 MUST-HAVE Are there as many parallel paths as logically possible in the network of dependencies?

9.5 MUST-HAVE Are all conflicts between task calendars and resource calendars resolved?

9.6 MUST-HAVE Are the tasks with a task calendar and resource calendar that have time in common scheduled appropriately?

9.7 MUST-HAVE Are all deadlines and constraint dates met in the schedule?

9.8 MUST-HAVE Does the schedule have a complete Critical Path or Resource-Critical Path?

9.9 MUST-HAVE Does the (Resource) Critical Path make sense?

Chapter 10 Checks on Reporting

10.1 NICE-TO-HAVE Is there a one-page performance report for the schedule that is readily available as a separate **View** or **Report** object in MS Project or from a third-party vendor?

10.2 NICE-TO-HAVE Does the one-page report give an appropriate impression of project health?

Chapter 11 Updating

11.1 NOTE THESE ARE MUST-HAVE'S WHEN TODAY'S DATE IS LATER THAN THE PROJECT START DATE: I.E. THE PROJECT IS IN ITS EXECUTION PHASE, OTHERWISE NICE-TO-HAVE Is the *schedule baseline* complete, relevant, challenging and correct?

11.1.1 MUST-HAVE DURING PROJECT EXECUTION Is the schedule baseline complete?

11.1.2 MUST-HAVE DURING PROJECT EXECUTION Is the schedule baseline relevant?

11.1.3 MUST-HAVE DURING PROJECT EXECUTION Is the schedule baseline challenging?

11.1.4 MUST-HAVE DURING PROJECT EXECUTION Is the schedule baseline correct?

11.2 MUST-HAVE DURING PROJECT EXECUTION Are the appropriate options selected in ribbon **File**, item **Options** for the chosen updating strategy?

11.3 MUST-HAVE DURING PROJECT EXECUTION Is the **Status Date** set to a current date?

11.4 MUST-HAVE DURING PROJECT EXECUTION Is the task type for soon-to-be-updated tasks set to **Fixed Units** and non **Effort-driven**?

11.5 MUST-HAVE DURING PROJECT EXECUTION Are all actual durations (actual work) scheduled in the past when they actually happened?

11.6 MUST-HAVE DURING PROJECT EXECUTION Are all remaining durations (remaining work numbers) scheduled in the future when they will happen?

11.7 MUST-HAVE DURING PROJECT EXECUTION Are the to-complete estimates revised?

11.8 MUST-HAVE DURING PROJECT EXECUTION Are the workloads of resources still reasonable after the schedule update?
This check is similar to check 9.2

11.9 MUST-HAVE DURING PROJECT EXECUTION Is the latest forecast finish date still before the project deadline date or before the schedule baseline finish date?
This check is similar to check 9.6

11.10 NICE-TO-HAVE If you used overtime to compensate for slippages, are overtime rates filled in for those resources?

11.11 NICE-TO-HAVE Is the latest forecasted total cost (or effort) of the project still within budget of the project?
This check is similar to check 9.3