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**Washington State
Department of Transportation**

Schedule Template Guidelines

Effective Date: July 1, 2008
Status: Revision 0
Supersedes: NA
Document Owner: Director, Environmental and Engineering Program

Introduction

This paper provides guidance and recommendations on the selection and use of schedule templates for developing WSDOT generated project schedules in Primavera Scheduler. With the implementation of the Project Management and Reporting System (PMRS), a project schedule must be developed for each project. As part of the PMRS effort, schedule templates are being developed for typical WSDOT project types and sizes and are available as a starting point in developing project schedules. Schedule templates are based on historical WSDOT projects and augmented with staff input. The templates will be critical path method (CPM) schedules that include standard activities, logic (relationships), durations, role-based resources, milestones, calendars, activity codes and project codes.

Schedule templates are intended to expedite the schedule development process; but do not replace project management input and refinement appropriate to the scope, schedule and budget of each project. The Project Manager is responsible for ensuring that project schedules accurately reflect the scope and plan for each project. Templates can be developed and used for an entire project or for sub-projects that are linked together to form a completed project schedule.

Selecting a Schedule Template

There are a number of factors to consider in selecting the appropriate schedule template to use in developing a project schedule. The following items should be considered:

1. Type of Project – The type of project (Paver with Safety Items, Interchange, etc.) is the first step in determining which schedule template is appropriate for the current project. Selecting a similar project type makes available relevant activities and durations, logic and other schedule attributes and can greatly reduce schedule development time.
2. Size and Complexity – The size and complexity of a project determines the number of activities required and their interrelationships. For example, projects requiring an Environmental Impact Statement (EIS) or special permitting may have more detailed schedules to support this level of involvement by the appropriate project team members. The number of outside project stakeholders may also reflect the complexity of a project and should be considered in selecting a template.
3. Internal or External Design – Whether the project design is performed by WSDOT or by external consultants will help determine the level of detail needed in the project schedule. For example, greater detail may be required by a WSDOT

Specialty Office to better manage staff resources, while less detailed activities may be used for work performed by external consultants or construction contractors.

4. Magnitude of WSDOT Specialty Office Support – The number of WSDOT Specialty Offices supporting the project as well as the level of detailed required to manage the work are considerations in selecting a schedule template.

Each schedule template will include the type of project (Paver with Safety Items, Interchange, etc.) along with either a short description of the major project elements or a scope statement to assist project staff in selecting the template best suited to the needs of the current project.

Use of Schedule Templates

After selecting the schedule template that most closely matches the current project or project element, it is recommended that the following items be considered:

1. Scope – Modify the template activities to reflect the scope of the current project and ensure that all necessary deliverables are addressed including the appropriate level of detail based on the needs of the project.
2. Activity Durations - Review and confirm activity durations.
3. Interfaces – Review and either confirm schedule logic (relationships) or modify relationships to internal and external activities to ensure that the schedule reflects the appropriate project interfaces.
4. Milestones – Review and confirm that milestones are included as required in the Project Control and Reporting Manual and that they are properly constrained in the schedule.
5. Resources – Review and confirm Primavera Scheduler role-based generic resources assigned to activities reflect the pool of resources available for the current project.
6. Budget – Update budget information so it reflects the current project.
7. Constraints – Avoid the use of constraints, wherever possible.
8. Calendars – Confirm that the template includes the project calendars appropriate for the current project.
9. Activity and Project codes – Review and modify activity codes and project codes to reflect the scope and needs of the project.
10. Filters and Layouts – Review and modify schedule groupings, summaries and report layouts to meet the regional management and reporting needs of the current project.
11. Control accounts – Review and confirm the appropriate control accounts for the current schedule. Refer to the Control Account Guidelines on the Project Management Web Portal for additional information on control accounts.