

Chapter 8 - Recording Actuals

Learning Objectives

- Organizing the updating process options
- Understanding calculation options
- Setting the project status date
- Updating tasks to reflect actual information
- Actuals and costs
- Techniques and tips for updating

Tackling the work of tracking

1. Update project schedule frequently and at regular intervals.
2. All the details of each task's progress and duration, as well as all the resources and costs associated with each task must be entered one by one.
3. To help to remember tracking, create tracking as a recurring task, occurring once every week or two, within your project file.
4. Using task notes to record progress and changes can be another good strategy for effective tracking.

Understanding Calculation Options

Calculations option will affect the project's cost and schedule.

1. You can review and change calculation options in the Options dialog box. Click the File tab and, from the Backstage view that appears,
2. Click Options to display the Options dialog box.
3. Calculation options appear in two places.
4. Click Schedule on the left and then scroll to the bottom to view the first set of calculation options
5. These options to be used when dealing with AUTOMATIC SCHEDULING option.
6. Choose calculate Project option ON



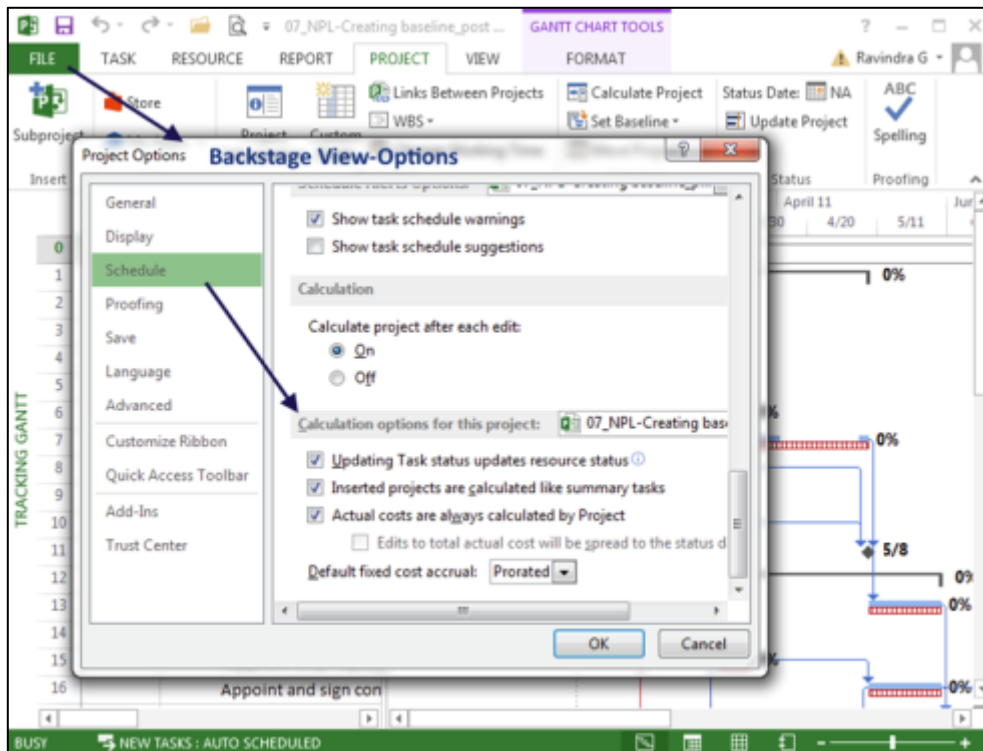


Fig.8.1: Calculations Option

Now let us look at the check boxes

1. Updating Task Status Updates Resource Status check box: Selected by default, this box tells Project to update resource status to correspond with any updated task status.
2. Inserted Projects Are Calculated Like Summary Tasks check box: When this box is selected (as it is by default), Project treats inserted projects like summary tasks when calculating the project schedule, instead of treating them like a separate project.
3. Actual Costs Are Always Calculated by Project check box.
 - a. When you select this check box, Project calculates actual costs.
 - b. You can't enter actual costs until a task is 100% complete;
 - c. Project will overwrite any costs that you enter prior to 100% completion as it recalculates costs.
4. Default Fixed Cost Accrual list box: Use this list box to choose a method for Project to accrue fixed costs for new tasks.

Click Advanced on the left and then scroll to the bottom to find additional calculation options that you can set (see Figure 8.2).



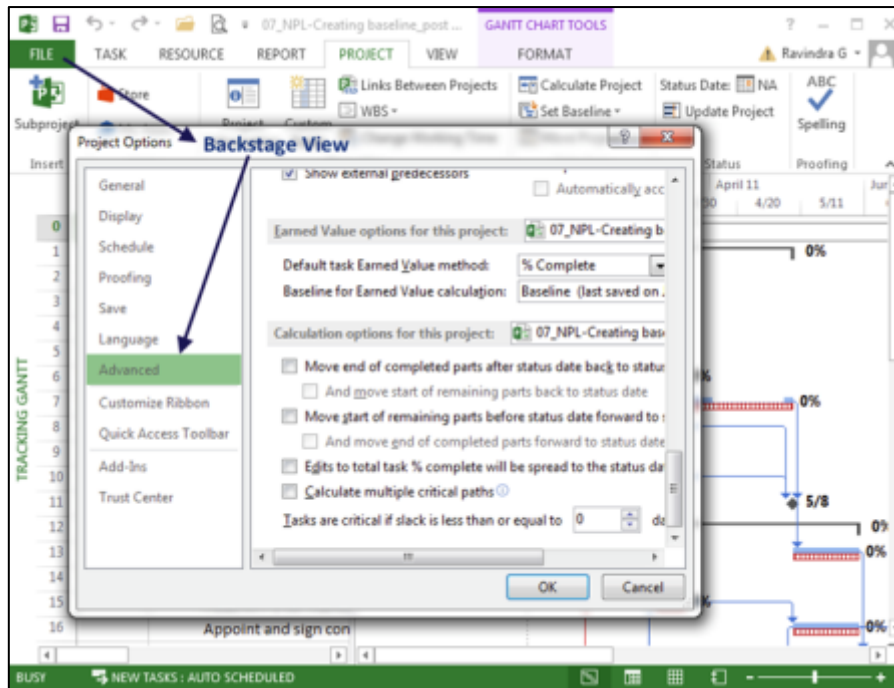


Fig 8.2

1. By default, when tasks begin late or early, Project doesn't change the task start dates or adjust the remaining portions of tasks.
2. The following four check boxes enable you to change this default behavior so that Project updates the tasks in relation to the Status Date — the “as of” date you use when recording information:
3. The check boxes work in pairs — that is, the first two check boxes work together and the second two check boxes work together.
 - a. Move End of Completed Parts after Status Date Back to Status Date
 - b. And Move Start of Remaining Parts Back to Status Date
 - c. Move Start of Remaining Parts before Status Date Forward to Status Date
 - d. Move End of Completed Parts Forward to Status Date (See Project Information dialog box)



Other calculation options include the following:

Edits to Total Task % Complete Will Be Spread to the Status Date check box: by default, this box is not selected, which makes Project distribute changes to the task percentage of completion to the end of the actual duration of the task. If you select this check box, Project instead distributes the changes evenly across the schedule to the project status date.

1. Calculate Multiple Critical Paths check box: When you select this check box, Project calculates and displays separate critical paths in the project — and sets the late finish date for tasks without successors or constraints to their early finish date. By changing the finish dates of these tasks, Project makes these tasks critical. When you deselect this box, Project sets the late finish date for these tasks to the project finish date, which leaves these tasks off the critical path.
2. Tasks Are Critical If Slack Is Less Than or Equal to x Days list box: By default, Project sets this value to 0; only tasks with no slack appear on the critical path. You can force tasks in your project onto the critical path by increasing this value.

Setting the Project Status Date

In order to update the project with actual information, set the project status date. If the project status date is not set then the Project uses the current date as the effective date for all updates you enter.

Follow these steps to set the project status date:

1. Click the Project tab.
2. In the Properties group, click the Project Information button to display the Project Information dialog box Use the Project Information dialog box to set the project status date before recording
3. Click the list box arrow beside the Status Date field to display a calendar.
4. Click the date you want Project to use to record actual information.
5. Click OK to save your changes.



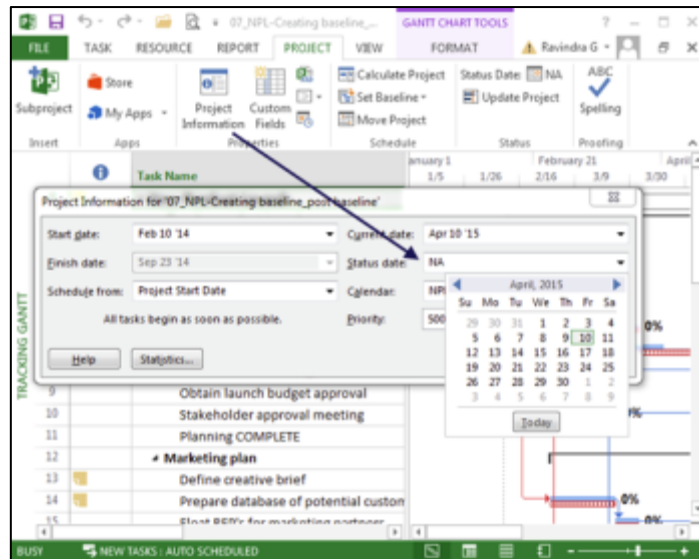


Fig.8.3: Setting Project Status Date

Updating Tasks to Reflect Actual Information

Using a variety of techniques project can be updated by filling in the following fields for each task that tracks the progress of your project:

- a) Actual start date
- b) Actual finish date
- c) Actual duration
- d) Remaining duration
- e) Percentage complete

In order to record the actuals do the following

1. Right click in the Gantt Chart view TOP LEFT corner (Fig.8.4)
2. You will see a list of tables
3. Select Tracking table
4. Study the various field displayed by Tracking table
5. You can choose one of the following methods to record actual as explained below



	Duration	Start	Finish	Act. Start	Act. Finish	% Comp.	Phys. % Comp.	Act. Dur.	Rem. Dur.	Act. Cost
Calculate Project										
Cost	153 days	Feb 10 '14	Sep 30 '14	Feb 10 '14	NA	11%	0%	16.79 days	136.21 days	19,05
Entry	46.13 days	Feb 10 '14	Apr 24 '14	Feb 10 '14	NA	37%	0%	17.2 days	28.92 days	\$11,0
Hyperlink	4 days	Feb 10 '14	Feb 14 '14	Feb 10 '14	Feb 14 '14	100%	0%	4 days	0 days	\$3,2
Schedule	2.88 days	Feb 16 '14	Feb 19 '14	Feb 16 '14	Feb 19 '14	100%	0%	2.88 days	0 days	\$6
Summary										
Tracking	7 days	Feb 20 '14	Mar 3 '14	Feb 20 '14	Mar 3 '14	100%	0%	7 days	0 days	\$5,6
Usage										
Variance	7 days	Mar 3 '14	Mar 13 '14	Mar 3 '14	NA	71%	0%	5 days	2 days	\$1,2
Work	15 days	Mar 3 '14	Apr 3 '14	Mar 3 '14	NA	10%	0%	1.5 days	13.5 days	\$3
More Tables...	3.75 days	Mar 3 '14	Mar 7 '14	NA	NA	0%	0%	0 days	3.75 days	
14	56.63 days	Mar 3 '14	Jun 2 '14	Mar 3 '14	NA	10%	0%	5.44 days	51.18 days	\$4,0
	15 days	Mar 3 '14	Mar 25 '14	Mar 3 '14	NA	33%	0%	5 days	10 days	\$4,0

Fig.8.4: Tracking Table for recording actuals

Setting actual start and finish dates

1. Project initially sets the Actual Start Date and Actual Finish Date fields to NA to indicate that you have not yet entered a date.
2. When you update your project to provide actual start and finish dates, Project changes the projected start and finish dates to the actual dates that you enter.
3. When you enter an actual start date, Project changes only one other field — the projected start date.
4. However, when you enter an actual finish date, Project changes several other fields: the Percent Complete field, the Actual Duration field, the Remaining Duration field, the Actual Work field, and the Actual Cost field. If you didn't set an actual start date, Project also changes that field.

Recording actual durations

The actual duration of a task is the amount of time that was needed to complete the task.

- a) To record an actual duration, use the Update Tasks dialog box.
- b) Select the task to record progress.
- c) Then, click the Task tab and, in the Schedule group,
- d) Click the arrow beside the Mark on Track button. From the drop-down list that appears,
- e) Click Update Tasks to display the Update Tasks dialog box (Fig.8.5)



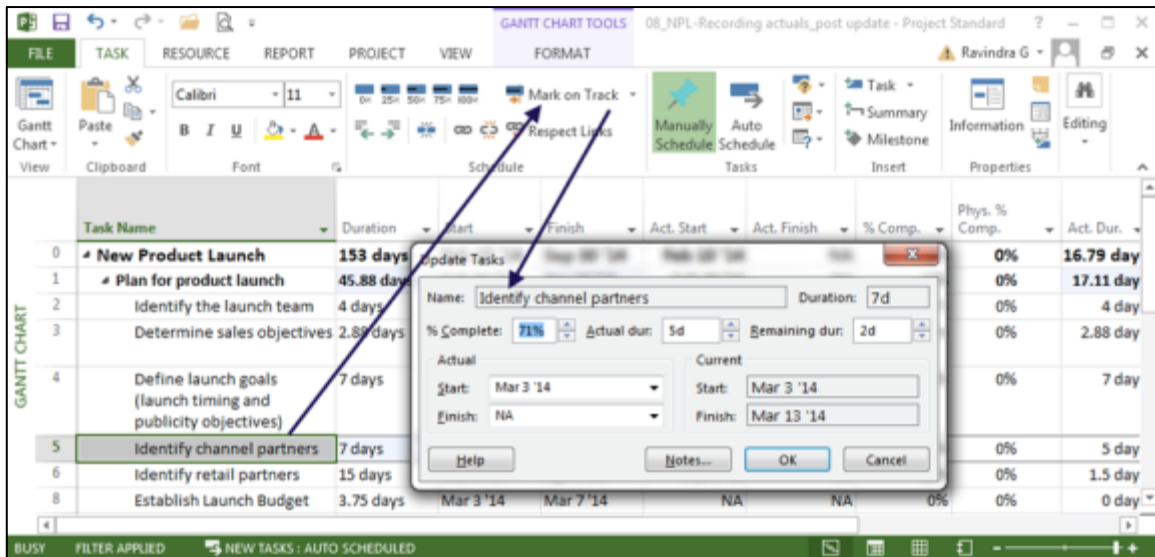


Fig.8.5: Update using Task update dialog box

- When you set an actual duration that is less than or equal to the planned duration, Project assumes that the task is progressing on schedule.
- When you click OK after setting an actual duration, Project sets the actual start date to the planned start date — unless you previously set the actual start date.
- In that case, Project leaves the actual start date alone. In either case, Project also calculates the percentage complete and the remaining duration for the task.

If you set an actual duration that is greater than the planned duration,

- Project assumes that the task is finished but that it took longer than expected to complete.
- Project adjusts the planned duration to match the actual duration and changes the Percent Complete field to 100% and the Remaining Duration field to 0%.
- You can set an option in the Project Options dialog box to have Project update the status of resources when you update a task's status.
- Click the File tab and, from the Backstage view, click Options.
- In the Project Options dialog box that appears, click Schedule on the left.
- Scroll down to find the Updating Task Status Updates Resource Status check box.
- If you set this option and then supply an actual duration, Project also updates the work and cost figures for the resources

NOTE: Do not change the actual duration of a task in effort-driven scheduling. Instead, change the number of resource units that are assigned or the amount of the resource assignment.



Setting work completed

Sometimes, tasks are scheduled based on the availability of certain resources. In these cases, tracking progress on a task is easiest if you update the work completed. Updating this value also updates the work each resource is performing.

In the same way that Project calculates duration information when you fill in a duration field, Project updates the work remaining by subtracting the work performed from the total work scheduled.

- Use the Tracking Table view to enter information into the Act. Work (Actual Work) column, but start in the Task Usage view so you can enter actual work performed by specific resources.
- Click the Task Usage view shortcut; then, to apply the Tracking table, right-click the Select All button, and choose Tracking from the shortcut menu that appears.

Setting remaining durations

The Rem. Dur. (Remaining Duration) field shows how much more time you need to complete a task.

If you change only the value in the Remaining Duration field so that it is higher or lower than the existing figure then Project assumes that you are changing the planned duration of the task instead of tracking actual progress for the task. Project will adjust the schedule based on the new planned duration.

But if you enter a value into the Rem. Dur. (Remaining Duration) column after entering an Act. Dur. value, Project assumes that the work for the task will be completed based on the remaining duration value. Therefore Project sets the % Comp. (Percent Complete) value based on a combination of the remaining duration value that you supplied and the original planned duration.

Similarly, if you enter information into the % Comp. field and the Rem. Dur. field, Project adjusts the Act. Dur. field using a combination of the remaining duration value and the original planned duration.

