**Baseline Checklist**

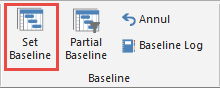
The Original Baseline

Preparations

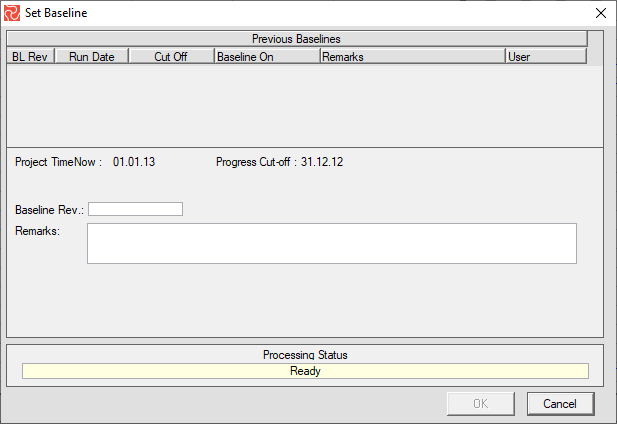
* Agree on project goals
* Agree on strategy
* Agree on schedule
* Agree on manhour and manpower load
* Agree on cost scheme
* Make sure your Safran plan has no progress figures – time, volume or actual dates

Run your baseline

* PROJECT > Baseline > Set Baseline



* + No options needed
  + Set baseline revision and remarks



**Baseline Checklist**

Re-Baselineing

Preparations

* Complete all outstanding reporting against the old plan

Complete all reports against the old plans (baseline, live etc.) prior to the baseline revision. The full project history is kept in the database, but not all reports can be produced from earlier baselines.

* Take a backup of your project

It’s good to have a fallback option in case you need to start from scratch. This can be a ‘Save As’ copy or an export or even a full database backup – depending on your use case of Safran. You may also want to set up date fields in your userfieldset to copy early start/finish dates onto, so you know what the old live plan looked like.

* Gather all relevant project information

Baselining is mainly about assuring a new, agreed plan for the remaining work over the remaining project period. You need to have reliable information about:

* + - The true progress of all ongoing activities
    - The project goals – are they the same as before
    - Is there any new or omitted scope? Review your change register
    - Estimates for any new activities
    - Any changes to the project milestones or completion date
* Quality check the status of the baseline cutoff
  + - The sum of the earned values of the resources should match the earned values of the parent activities.
    - The Current Actual dates should be within the periods where progress occurred
* Move TimeNow to the first day after the baseline cutoff

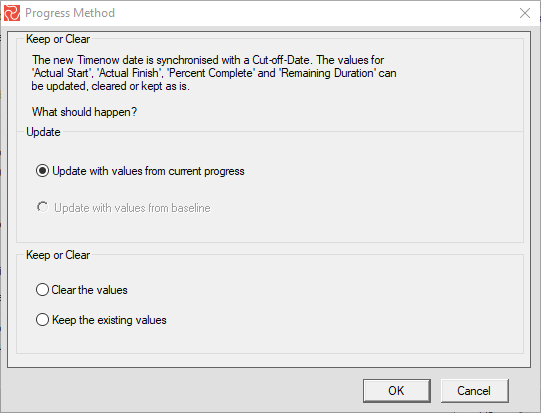
PROJECT > Properties > Schedule Options

* Pick up volume progress for calculation of time progress

After you move TimeNow, Safran Project will prompt you for how progress fields should be affected by the change in TimeNow.

The answer to this should always be “Update with values from current progress”

This will balance out the effect of moving the TimeNow date, leaving the schedule to be the remaining scope over the remaining periods. This option should always be used. See screenshot on next page.



* Resolve all schedule conflicts

The live plan will now be calculated from the new timenow with updated time progress and actual dates. Use your backup dates of your old live plan to review the new dates. If relevant and possible, use different techniques to rearrange the plan:

* + - Change durations
    - Change logic (links, delays)
    - Change calendars
    - Break long activities into smaller activities

You should always avoid:

* Negative float
* Constraints earlier than timenow for activities that are not completed
* Resource dates outside activity dates (only relevant if you have duration or delay on resources)
* Actual start/finish dates in future

Other things to think of here is:

* Profiled resources and modified RDU result in linear spread of the scope
* Actual Start and Finish values take priority over the PC value
* Add any missing scope:
* Are all pending change orders approved? If not, should we keep them in the plan?
* Is there any new scope to be added
* Should any existing scope be redistributed or removed?

It’s OK to keep unapproved Change Orders, but keep in mind the scope settings and know there may be variances between the Baseline, Current and Total scope after you run the baseline.

* Final review of alignment with project goals

After rescheduling the plan and amending scopes you should make a final strategic review of the situation. Do all stakeholders agree with:

* + - Project goals
    - Strategy
    - Schedule
    - Manhour and manpower load
    - Cost scheme
* Re-run the cutoff …or don’t

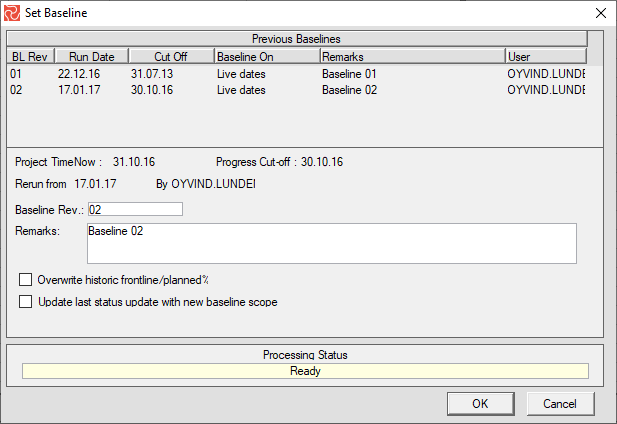
If you want the changes you made to be included for the last status update, then you want to run the cutoff again. This saves any changes to the scope or progress values and other information that the baseline process will pick up from the history during the rebaseline process. This also ensures that the Current plan will match the Baseline and Live plans immediately after the baseline. Remember, to lift progress values to the live plan, you have to move timenow back and then move it forward to the Monday after cutoff. This way Safran Project will prompt you for how you want to handle progress.

If you don’t want the changes to be included for the last status update – i.e. you only want them to apply for the new baseline – don’t run the status update.

* Run the baseline

Now it’s finally time to run the baseline. Make sure you’re alone in the project. The new plan will not automatically recalculate all values from the new baseline. A full calculation against the new baseline takes place at the next cutoff. This is because Baseline Planned Progress is calculated in the Status Update and not in the Baseline.

If new values for this baseline are required immediately, this can be achieved by using the optional checkboxes (see explanation on next page):



* + **Overwrite historic frontline/planned%**

Sets frontline and Planned % for Barchart Editor reports

* + **Update last status update with new baseline scope**

Sets history values for Histograms and Progress Summary Reports

**Note! Increases in the baseline earned values will now occur immediately in the new baseline period.**

* Run consistency checks and reports

Run Barchart Editor reports with Live, Current and Baseline dates. Histogram/S-Curves with Live, Current and Baseline dates and scopes.