PRACTICE STANDARD FOR SCHEDULING

Second Edition

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PREFACE

The *Practice Standard for Scheduling*—Second Edition has been developed as a complement to *A Guide to the Project Management Body of Knowledge* (*PMBOK® Guide*—Fourth Edition) in the Knowledge Area of Project Time Management. This second edition of the practice standard builds upon the foundation established by the first edition describing the methods related to scheduling that are generally recognized as good practice for *most projects most of the time*. Good practice means that there is general agreement that the correct application of these skills, tools, and techniques can enhance the chances of success over a wide range of different projects. Good practice does not mean that the knowledge described should always be applied uniformly on all projects; *the project management team is responsible for determining what is appropriate for any given project*.

The project management community has strongly voiced the need for a standard to promote the development of sound schedules. In addition, the community asked for the capability to assess the adequacy of their schedules.

This practice standard is designed to provide project management practitioners, who are familiar with the *PMBOK® Guide*—Fourth Edition, with a summary of the benefits and advantages of a well-developed and maintained schedule model. This practice standard describes the hallmarks of a sound and effective project scheduling methodology, as well as providing quantifiable means for assessing the application of the provisions of this standard to a schedule model.

One of the most significant developments in the creation of the first edition of the *Practice Standard for Scheduling* centered upon the clarification of the term *schedule*. It became apparent through the discussion process and the community feedback that there was significant support for the clarification of this terminology. The *Practice Standard for Scheduling*—Second Edition clarified this distinction between the project schedule and schedule model.

Schedule development flows from the selection of an appropriate *scheduling method* followed by selection and use of a *scheduling tool*. Next, project-specific data is entered into the *scheduling tool* to produce the *schedule model*. From there, instances of the *schedule model* are saved for use as what-if platforms, targets, and for formal approval as a baseline. From these instances, various *presentations* are produced for a wide range of uses. With these discrete terms, project management practitioners have the ability to trace the processes from the *PMBOK® Guide*—Fourth Edition to the finished product and answer, in a specific and unambiguous way, the question of what is being requested when you are asked for a schedule.

The *Practice Standard for Scheduling*—Second Edition focused on adding more clarity to the issues and concepts of the previous edition:

- Chapter 2 was reorganized to align more closely with the *PMBOK® Guide*—Fourth Edition with specific emphasis on schedule model management and providing additional clarity on the various schedule methods and techniques.

- Chapter 3 was reorganized to emphasize good practices in the areas of model management, model creation, maintenance, analysis, and communication and reporting.
- Chapter 4 remains focused on the various components of a schedule model. The update introduces the concept of four *required* component groups in addition to two *optional* components groups. This refinement was developed to address areas of concern raised from the 2007 edition, broadening the scope of coverage to earned value, risk, and the application of resources.
- Chapter 5 was rewritten to continue to allow for the assessment of a schedule model within the more complex guidelines of multiple required and optional components. It also addressed a concern expressed from the previous edition concerning the assessment process.

This practice standard is consistent with the *PMBOK® Guide*—Fourth Edition. It also includes information from accepted project management practices from many industries. The Project Management Institute standards program will continue to periodically update this standard as part of the overall planned evolution of PMI standards documents. Comments from project management practitioners are both requested and welcome.

CHAPTER 1

INTRODUCTION

This chapter is designed to provide an overview of the content of this practice standard. This chapter is divided into the following sections:

1.1 Project Scheduling

1.2 Why Scheduling

1.3 Overview

1.4 Purpose

1.5 Applicability

Each section provides additional information on the content and terminology used in this practice standard.

1.1 Project Scheduling

Project scheduling is the application of skills, techniques, and intuition acquired through knowledge and experience to develop effective schedule models. The schedule model integrates and logically organizes various project components, such as activities, resources, and logical relationships, to enhance the likelihood of successful project completion within the baseline duration.

The terms schedule model, schedule model instance, and presentations are defined in the glossary of the standard. These terms are described below:

Schedule model is a dynamic representation of the plan for executing the project activities developed by the project stakeholders, applying a selected scheduling method to a scheduling tool using project-specific data. The schedule model can be processed by a scheduling tool to produce various schedule model instances.

Schedule model instance is a copy of the schedule model, that has been processed by a schedule tool and has reacted to inputs and adjustments made to the project specific data within the scheduling tool (completed update cycle), that is saved for record and reference, such as data date version, target schedule models, and the baseline schedule model. The instances produce various schedule presentations such as critical paths, resource profiles, activity assignments, record of accomplishments, etc., and can provide time-based forecasts throughout the project's life cycle. When used together, the instances support analysis, such as variance analysis.

Presentation is an output from schedule model instances, used to communicate project-specific data for reporting, analysis, and decision making.