



Flexible and Shelf Project Schedules

March 20, 2015

Purpose

The purpose of this document is to inform P6 Implementation staff how flexible and shelf project schedules are created and maintained in P6.

Flexible and Shelf Projects

A project code will be assigned to designate the project as a flexible or shelf project. The code will allow P6 to report on flexible and shelf projects for upper management at MnDOT.

[RD-00-06 Project Code Dictionary.xlsx](#) will include the following entry for the FLEX/SHELF code:

| Project Code | Description | Assigned by | Updated by | Authoritative Source | Required | Secure Code |
|--------------|--|-------------|------------|----------------------|----------|-------------|
| Flex/Shelf | Identifies if a project is a Flexible or Shelf project | SSC | SSC | P6 | Yes | No |

| Name | Description |
|----------------|---|
| Flex | Flexible projects have funding and an assigned letting date. Construction documents (plans, special provisions, permits, etc.) will be completed on a more aggressive schedule determined by the District so that the letting date can be advanced a year or two earlier in the STIP. |
| Shelf | Shelf projects do not have funding. Construction documents (plans, special provisions, permits, etc.) will be completed on a schedule determined by the District so they can be let when funding is obtained. |
| Not applicable | Projects that are not Flexible Projects or Shelf Projects. |

Flexible Schedules:

The District may determine the project (or a portion of the project) should be completed ahead of the baselined schedule. To incorporate this in P6, the schedule will be created and maintained in conformance with [PD-10-1 Schedule Creation and Baseline Process](#) and [PD-20-01 Schedule Maintenance](#) with the following exceptions:

1. District determines the project is a flexible project and the date the project will be turned in or the date the deliverables are required.
2. PM notifies SSC that the project is a flexible project and provides the date the project will be turned in or the date the deliverables are required.
3. SSC will assign the MnDOT FLEX/SELF code to FLEX.
4. SSC will notify Admin that the project is flexible.
5. Admin will place a backup copy of the schedule modules into the Admin Archive node of P6.
6. Admin will send an email to SSC Leader notifying them that the backup schedules has been created.

SSC will create what if schedule modules in the sandbox to assist the PM in obtaining project team concurrence on the updated schedule.

SSC will work with the PM to enter a FINISH ON OR BEFORE constraint to match the deliverable date determined by the PM for the appropriate controlling activity.

A Constraints notebook topic should be inserted on the constrained activity that includes the date, the scheduler's name, and the reason for the constraint.

Note that only the controlling activity should have the assigned deliverable date so P6 can determine the float. There should be only one constrained activity on the schedule. If needed, a finish milestone can be added to the Project Management node of the WBS to satisfy this requirement.

Note that the original schedule will remain active in the live EPS node so activity owners can continue to update their progress in the schedule an Admin can move the data date and run the global reports.

7. SSC will work with the PM to confirm the logic ties in the schedule and the deliverable dates are acceptable.
8. SSC receives confirmation that PM has received approval of updated schedule from project team.
9. SSC will review the schedule in the live EPS and update the activities in the what if schedule modules appropriately.
10. SSC will schedule the project using the active project's data date.
11. SSC will restore the re-baselined schedule modules to live EPS using the WBS Level Schedule Module Transfer process outlined in Section 4.7 of [OP-20-01 Schedule Maintenance](#) document.
12. SSC will re-baseline the project schedule modules.

The process to re-baseline a schedule outlined in [PD-10-01 Schedule Creation and Baseline Process](#) section 3.2 Step 23 with the following modifications:

- a. SSC will use the next consecutive number and Project Data Date to re-name project baseline.
- b. “BL02-DD **/**/**** PROJECT NAME” (Asterisk represents current data date of project).
- c. SSC will re-assign the newly created baseline to each project schedule module within the Prime SP

Shelf Schedules:

Shelf projects do not have funding. However, the District has determined that the construction documents for the project should be completed. To incorporate this in P6, the schedule will be created and maintained in conformance with [PD-10-1 Schedule Creation and Baseline Process](#) and [PD-20-01 Schedule Maintenance](#) with the following exceptions:

1. District determines the project is a shelf project and the date the plans are to be placed on the shelf.
2. PM notifies SSC that the project is a shelf project and provides the date the plans are to be placed on the shelf.
3. SSC will inform Admin that the project is a shelf project and will not have a letting work package.
4. Admin will adjust global reports to reflect the shelf project.
5. SSC will assign the SHELF code to the FLEX/SHELF project code.
6. SSC will work with the PM to determine which activities are to be completed to place the project on the shelf.
7. SSC will set a MUST FINISH BY DATE that matches the date deliverables are to be completed to place the project on the shelf.
8. SSC will remove all activities that do not need to be completed to place the project on the shelf.

Removing the activities will ensure that the activities are not in Team Member and role reporting is accurate. The activities may be reinserted in the schedule as they are needed.

9. SSC will update project notebook topics to include a list of the activities removed so the activities can be added once the project is taken from the shelf.

District determines the project is to be let and assigns a letting date.

1. PM notifies SSC that the project will be let and the assigned letting date.
2. SSC will inform Admin that the project is going to be let.
3. Admin will place a backup copy of the schedule modules into the Admin Archive node of P6.
4. Admin will send an email to SSC Leader notifying them that the backup schedules has been created.

5. SSC will update the FLEX/SHELF project code to Not Applicable.
6. SSC works with the PM to insert the work packages and activities that are required for letting in the what if schedule.
7. SSC receives confirmation that PM has received approval of updated schedule from project team.
8. SSC will review the schedule in the live EPS and update the activities in the what if schedule modules appropriately.
9. SSC will schedule the project using the active project's data date.
10. SSC will restore the re-baselined schedule modules to live EPS using the WBS Level Schedule Module Transfer process outlined in Section 4.7 of [OP-20-01 Schedule Maintenance](#) document.
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 - b. "BL02-DD **/**/**** PROJECT NAME" (Asterisk represents current data date of project).
12. SSC will re-assign the newly created baseline to each project schedule module within the Prime SP

For More Information

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