

See-Make BRANCH

PROGRAM PLANNING TEAM AND MASTER SCHEDULER ROLES AND RESPONSIBILITIES.

The central PROGRAM planning team will need to design company-wide standards for the following:

- ✎ Data flow
- ✎ Roles and responsibilities
- ✎ Progressing standards
- ✎ Calendars and holidays
- ✎ Code files for reporting and analysis
- ✎ Resource definition and assignments
- ✎ Handling of cost
- ✎ Cross project reports
- ✎ Systems for determining priorities
- ✎ Conflict resolution procedures

A strategy should be developed that includes the specification of standards in a procedure document, along with the specification of detailed procedures. This can be facilitated by the creation of custom PMD processes in Open Plan Professional. These should be available to all users of the scheduling software you implement. In either Open Plan Desktop or Open Plan Professional, the on-line Help system can easily be annotated to include our company's procedures. Consulting or training in the use of Open Plan Desktop and Open Plan Professional can be developed by experts in your company or by Welcom to address your standards and procedures. The procedures should not be a restrictive rule book but instead, a minimum set of standards required to enable coordinated scheduling and corporate-wide reporting. Users should be allowed to develop their own approaches as long as they conform to the data transfer standards.

Keep these procedures as simple and flexible as possible because many users are not able to forecast their reporting needs until they see live data. The PMD is designed to facilitate the implementation of standards and procedures throughout the organization.

Defining Roles and Responsibilities

Earlier we identified characteristics of users who might prefer using Open Plan Professional or Open Plan Desktop. Here we will identify the roles and responsibilities of the two most common types of schedulers: the central or master scheduler, and the functional schedulers whose job it is to schedule sub-projects.

A master scheduler is:

- ✎ Responsible for the overall plan, reporting to management and the client
- ✎ The person who manages interrelationships between functional and area schedulers/managers
- ✎ Responsible for assigning resources from a central pool
- ✎ Able to identify current and future critical areas
- ✎ Responsible for informing and expediting critical data

- ☞ Responsible for creating performance projections and what-if analyses based on progress

A functional scheduler using Open Plan Desktop is often:

- ☞ Directly responsible for allocating resources to tasks
- ☞ The person who statuses tasks and resources
- ☞ Manager for a group of tasks in a limited section of the schedule, such as a sub-project
- ☞ Able to identify which tasks are likely to slip
- ☞ Responsible for resource scheduling