


FACILITIES MAINTENANCE AND ENGINEERING PROCEDURE		
Subject: SCHEDULING	FMEP-PC-0140	Rev. No. 2
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	Approved: 	

1.0 PURPOSE

To define and standardize the requirements for preparation, approval and control of Work Order (WO) schedules.

2.0 GENERAL

2.1. This describes the scheduling process used by FME Project Managers to communicate resource schedule requirements and commitments.

2.2. Schedules are required for all planned Work Orders issued to FME for the purpose of:

- 2.2.1. Providing a basis for communicating planned and actual timeframes for completion of the work scope.
- 2.2.2. Forecasting future resource requirements.

2.3. Definitions

2.3.1. Planned Work Order (WO) – A Work Order request received electronically that is estimated by the FME to cost more than \$5K and requires an estimate, schedule, scope of work and proper approvals prior to execution. (Ref: FMEP-G-0160).

2.3.2. Scope of Work (SOW) – Issued in accordance with FME Procedure FMEP-P-210. This document identifies the scope of the project in sufficient detail that a cost estimate can be developed.

2.3.3. Unplanned Work Order – typically requires only shop action. Specific requests are classified as either Trouble Calls or Special Assists:

- a) Trouble calls – a request received for immediate assistance for building or equipment repairs. (Ref:FMEP-G-0161)
- b) Special assists – a work order that is estimated by FME to cost less than \$5K and assigned to the appropriate shop for planning and execution.

2.4. Responsibilities

2.4.1. Project Controls Manager is responsible to oversee the scheduling process and proper execution of this procedure.

2.4.2. Project Manager (PM) has the responsibility and authority for all schedules within their directorate.

- a) Provide the scope of work (SOW) in accordance with FME procedure FMEP-P-0210.
- b) Review and accept Work Order schedules submitted by subcontractors
- c) Review schedules with Engineering and Estimating resource managers for technical accuracy, appropriateness, duration and resource availability, to achieve milestone commitments. (Ref: FMEP-G-0190).
- d) Prior to FA Package submittal to NCI (or CA Package, if required), review SOW and preliminary schedule with O&M Resource Coordinator to ensure the schedule reflects appropriate durations and resource availability for Craft Shop Construction activities to achieve milestone commitments.

2.4.3. Manager of Engineering is responsible to:

- a) Provide design and engineering assistance.
- b) Assist in the development of the Work Order Scope.
- c) Review and verify the scope and schedule for Engineering.

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2.4.4. Scheduler is responsible to:

- a) Review the SOW and prepare the schedule.
- b) Maintain schedule templates designed to represent likely scenarios of activities, durations and sequence from previously completed Work Orders and lessons learned.
- c) Submit a draft schedule to the Project Manager based on the SOW from the WORM and schedule templates. The Work Order schedule remains in “Draft” mode until the Project Manager has updated schedule with dates and durations based on the concurrence of Engineering and Estimating.
- d) Maintain the schedule through the life of the work order.

2.4.5. Construction Contracts provides schedules and/or scheduling data provided by the Architect Engineer, Construction, or other outside vendors to the Project Manager and scheduler for inclusion or support of schedules.

2.4.6. Operations and Maintenance Manager is responsible for the preparation, review and verification of Shop Schedules.

3.0 PROCEDURE

3.1. Scheduling Process

3.1.1. Schedule Requirements

- a) The schedule shall be developed in Primavera Project Planner.
- b) The schedule will include project management, engineering, craft and COTR resource estimates (i.e. number of hours) in order to prepare resource loaded schedules needed for resource-planning efforts.
- c) Actual hours worked are entered into Primavera to be used as a basis for determining hours to go.
- d) Schedule activities will be based on specific deliverables. The durations of the schedule activities shall reflect the estimated time required in completing the work scope based on the availability of resources and schedule interfaces and constraints.

3.1.2. Initial Schedule Setup

- a) During the Work Order Review Meeting (WORM), work orders are categorized as either “planned” or “unplanned” (Ref: FMEP-G-0160, “Work Order Processing”). Due to the low dollars value and the absence of engineering scope associated with unplanned work orders, only planned work orders are included in the FME master schedule. Planned work order schedules are initiated using pre-established templates derived from the anticipated scope of the work order. Currently, these templates consist of the following: a) no design, shop work only, b) FME design, shop construction, c) FME design, construction outsourced, d) design and construction outsourced and e) study, analysis or estimate preparation only.
- b) The specific template used to establish the initial schedule for each planned work order is discussed at the WORM. The Project Manager tailors the template with schedule specifics, by addressing scope, durations, logic, estimated start dates, etc. This schedule is then used as the current schedule.

3.2. Statusing

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3.2.1. Baseline Schedules

- a) FA Approved work orders are entered in the Baseline schedules are based on the current durations, logic, etc. established by the project management in the FA Package submittal.
- b) Baseline schedules for construction are established in the CA and/or FA Package. (Ref:FMEP-P-0150, "Work Order Funding")

3.2.2. Current Schedules

- a) The Current schedules, based on the original durations, logic, etc. established by the project manager and representative of resource availability, are the basis for weekly status updates. The Project Manager provides actual start dates, actual finish dates, remaining durations, etc. This data is entered into the Current schedule database and then commitments are re-forecasted based on the new "time-now" date.
- b) Approved scope change trends are added to the current schedule. Care must be taken to ensure that any budgets that are entered are constrained to occur after the current "time-now" date in the Current schedule so as not to adversely impact the time-phased cost baseline prior to "time-now". (Ref:FMEP-G-0120, "Trend Program")
- c) Reports are generated for management use including bar charts and resource loading reports/graphics.