

Tasks

The Tasks form is used to capture the information necessary to maintain the DGS Master Schedule tasks through the project lifecycle and make certain dates and data available for reporting, tracking, and management purposes. Standard DGS Master Schedule tasks containing the baseline and initiation information as provided in the Project Request are uploaded to the project at project creation.

DGS Project Managers are responsible for updating and maintaining the DGS Master Schedule task record information at an appropriate frequency to always maintain current and complete information for the life of the project using the provided Task records in their projects.

NOTE: The DGS Master Schedule tasks are applicable to the entire project. If your project will have multiple phases, only the earliest of the start dates will apply to the start date and the latest of the finish dates will apply to the finish of each associated task.

For example, if there will be three (3) phases of construction on your project occurring in order with each phases having a different substantial completion date, the start date for Phase 1 of construction would be the date the Construction Phase starts, the Phase 3 substantial completion date would be the Construction Phase finish date and would also be the applicable project Substantial Completion Date.

Tasks Utilized in the DGS Master Schedule

Project Initiation - This milestone date is the start of the project and is typically the date that the project is created and assigned to a DGS Project Manager. This task is completed by CPO when the project is created and should not need to be adjusted or edited.

Planning Phase – The DGS Project Manager works with internal DGS resources/stakeholders, select external resources/stakeholders, and the client agency to determine the complete scope of work, budget, and finalizes the plan for the project. This phase ends when the design phase begins if there will be a design for the project or when the construction phase begins if there is no design phase.

Design Phase (if required) – The Design Phase begins when the contract is awarded to the design team (or award of the Design-Builder letter contract on design/build projects). Not all projects have a Design Phase, and this task will not appear for projects that were requested with delivery methods that do not include design work (Design Assist, TI Projects, etc.). The Design Phase ends when construction starts for planning purposes. You can adjust the Design Phase to continue during Construction Phase if applicable (such as in Design/Build or CMAR projects when the construction work starts while design is still ongoing).

Note: The Status of the project is always Construction once any construction work is underway on the project, even if design is still ongoing.

Construction Phase – The Construction Phase begins when the contract is awarded to the General Contractor or when the first construction activity begins on a project for Design/Build or CMAR projects. The Construction Phase ends on the Substantial Completion Date.

Substantial Completion Date – Substantial Completion Date is a milestone date on which the project will achieve substantial completion per your program definition. This is often when the Client Agency will obtain beneficial occupancy of the facility. Please reach out to your EPM for the appropriate definition of substantial completion to determine the correct date to use for your project.

Close-out Phase – The Close-out Phase is the period immediately following Substantial Completion where the final remaining items on the project are wrapping up and the facility is being turned over to DGS Facilities Division or the using agency, as appropriate. A 90-day Close-out phase follows Substantial Completion in the standard DGS Master Schedule.

Administrative Close-out – Administrative Close-out follows Close-out and includes longer-lead commissioning tasks, LEED Certification, solar work from DGS S+E, or other similar items. The DGS standard Administrative Close-out period is set at 365 days following Completion of Close-out.

Architect/Engineer Procurement (if required) – This is the period in which DGS will be or is actively procuring architecture/engineering and/or similar design services for the project. This is not used where DGS is not contracting directly with the A/E firm or issuing a design services contract. Architect/Engineer Procurement starts with the request for procurement of design services to DGS Contracts + Procurement Division and ends with the award of the design services contract to the selected vendor.

General Contractor Procurement - This is the period in which DGS will be or is actively procuring construction services for the project, to include procurement of a Design/Builder if a design/build project or Construction Manager if a CMAR project. General Contractor Procurement starts with the request for procurement of construction, design/build, or construction management services to DGS Contracts + Procurement Division and ends with the award of the applicable contract to the selected vendor.

Project Complete – The project is complete when all project work is complete, final payment has been made to all vendors, and the facility has been properly turned over to the appropriate users and maintainers.

Tasks Form Field Use Guidelines for DGS Master Schedule Updates

Do not edit or change the **Task Name**.

Baseline Start date, **Baseline Finish** date, and **Baseline Duration** should only be adjusted with written authorization from the appropriate Executive Program Manager (EPM) or CCS Executive.

The **Duration** field is used to capture the current duration for planned or incomplete tasks. This field should be updated during the progress of the task and the entry should be deleted once the task is completed.

Dates for planned tasks should be tracked in the **Early Start**, **Early Finish**, and **Duration** fields on the appropriate task record. **Late Start** and **Late Finish** fields are not used currently.

The **Actual Start** date for each task should be entered, and the **Early Start** date for that task removed when each task starts.

Planned completion dates for in-progress tasks should be entered in the **Early Finish** date field and the corresponding **Duration** and **% Complete** fields updated as appropriate while the task remains incomplete.

The **Actual Finish** date should be entered, **Early Finish** Date removed, **Actual Duration** entered, **Duration** removed, and **% Complete** set to “100” when the task is completed.

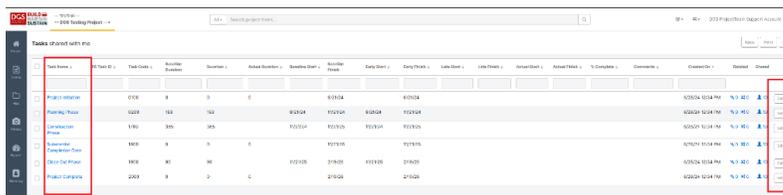
Add **Comments** in the provided field when appropriate (i.e. include the reason for re-baselining the activity if you are revising the baseline dates).

The DGS Standard Tasks for the DGS Master Schedule are determined by DGS CPO and generated via upload at project creation. Additional task records should not be created by users.

If you do not have Task records in your active project to maintain and update, please reach out to DGS.ProjectTeam@dc.gov to have them added. Additional information regarding proper scheduling techniques and management is available from the DGS Scheduler at DGS.Scheduler@dc.gov.

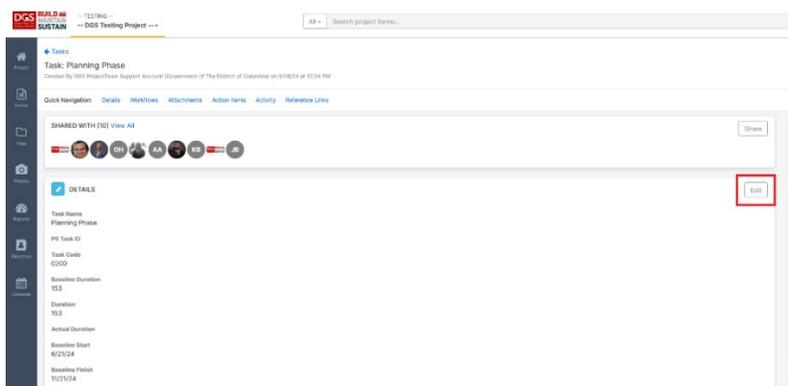
Editing a Task to Update or Maintain the Record

1. Navigate to the project that you wish to update or maintain the task records on. Click on the **Tasks** form through the *Forms* icon in the navigation pane or your *Favorite Forms* list to show the log view.
2. Select the task record that you wish to update by clicking on the blue **Task Name** or the “Edit” button for the appropriate task row in the log.



Task Name	Task Code	Baseline Duration	Number	Actual Duration	Baseline Start	Baseline Finish	Early Start	Early Finish	Late Start	Late Finish	Actual Start	Actual Finish	% Complete	Comments	Checked On	Updated	Deleted
Project Initiation	0100	0	0	0	6/1/14	6/1/14	6/1/14	6/1/14							6/25/14 10:14 AM	6/25/14	
Planning Phase	0200	100	100		6/25/14	9/25/14	6/25/14	6/25/14							6/25/14 10:14 AM	6/25/14	
Location Phase	1100	300	300		9/25/14	12/31/14	9/25/14	9/25/14							6/25/14 10:14 AM	6/25/14	
Construction	1800	0	0	0	12/31/14	12/31/14									6/25/14 10:14 AM	6/25/14	
Transfer of Ops	1900	0	0	0	12/31/14	12/31/14									6/25/14 10:14 AM	6/25/14	
Post-Oper Phase	2000	0	0	0	12/31/14	12/31/14									6/25/14 10:14 AM	6/25/14	

3. Click on the “Edit” button at the top-right of the open record to open the record in edit mode.



Task: Planning Phase
Created By DGS ProjectTeam Support Account (Government of The District of Columbia) on 6/25/14 at 10:14 PM

Quick Navigation: Details | Workflows | Attachments | Action Items | Activity | Reference Links

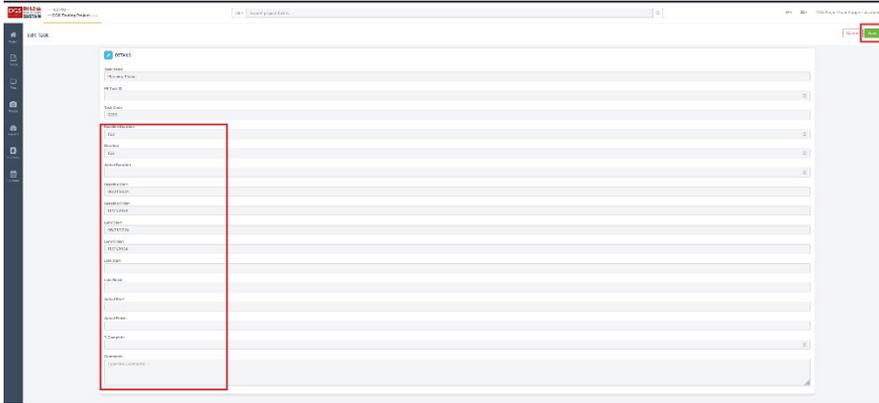
SHARED WITH (10) View All

DETAILS

- Task Name: Planning Phase
- PK Task ID: 0200
- Task Code: 0200
- Baseline Duration: 100
- Duration: 100
- Actual Duration: 100
- Baseline Start: 6/25/14
- Baseline Finish: 9/25/14

4. Edit the fields for the task per the information and form field use guidelines at the beginning of this QRG. Click on the “Save” button when complete.

NOTE: Do not manually type dates into the fields. Select the dates from the pop-up calendar in each date field.



5. Return to the log view using the in-page link and repeat Steps 2-4 for each applicable Task record.

