When building a project – follow these steps:

- The project should already be created in ND VIEW – contact Val Brostrom if it is not there.
- Create WBS tasks – enter tasks
- Add logical dependencies – don't do it based on resources
- Enter duration or effort (hours/work)
- Add resources, then level resource allocation where needed
- Create baseline

Do the following when creating your schedule:

- Project Summary Task enabled
    - Should be Task 0 in the schedule
    - No need to have a "project name" as Task 1
    - To enable, go to the Format menu and check Project Summary Task
- Summary tasks
    - Should have an associated milestone task
    - No predecessors, successors, costs, or resources assigned
- Milestones
    - No resources assigned, including cost resources
    - Duration is 0
    - All sub-tasks under a summary task should be a predecessor on the milestone task – not just the task with the latest date
- Resources
    - Use staff from Enterprise Resource Pool when available – all NDIT staff are in the Enterprise Resource Pool
    - Add "Cost" resources from Enterprise Resource Pool and add to tasks where appropriate (Contact an ND VIEW admin if you need a new cost resource)
    - Review to ensure resources are not overallocated (red dude in the indicators column) and make appropriate adjustments
- Costs
    - All costs must be in the schedule
    - Costs are assigned to a resource from the Enterprise Resource Pool
- No Constraints
    - No constraints or hard dates
    - Use a Deadline if there is a desired target date for a task
- Duration
    - Durations are typically entered as whole days
    - Tasks should be about 10 days or less in duration – there are a few exceptions to this rule
- Baseline
    - Current baseline is saved as "Baseline" along with a numbered baseline (e.g., Baseline 1)
    - "Baseline 1" is the original baseline
    - You should always have two baselines that are the same (e.g., "Baseline" is always your current baseline, "Baseline 1" is your original baseline, "Baseline 2-10" would be the current baseline if there has been a rebaseline or an updated baseline)
    - A rebaseline on the schedule can only be done due to a scope change and only the impacted tasks are rebaselined
- Actual Start, Actual Finish, and Percent Complete
    - Reflect real start and real finish dates
    - Include percent complete
- Tasks
    - All tasks must be auto scheduled
    - Task names should start with a verb as they should be an activity
    - All tasks, except summary tasks, need to have a predecessor(s)
    - All tasks, except summary and milestone tasks, need to have a resource(s)

The schedule should be done in a top-down manner. Meaning, the schedule will determine the go live date once it's built according to the best practices above. The schedule should not be built in a bottom-up manner or in a way that has a predetermined end date and forcing tasks to be done by specified dates to achieve that predetermined end date.

Items Specific to the State or ND VIEW:

- All IT projects $100,000 or more are required to be managed in ND VIEW and to follow the Project Management state standard
- Resources
    - Add the name of the state project manager to the Project Management task and adjust the allocation percentage
    - Use the role "_State Project Manager" on tasks that the state project manager is a resource on
    - Adjust allocation percentages for all state staff to reflect the effort on the task
- Key Tasks
    - This is a custom field for the State
    - Identify tasks appropriately
    - Not all milestones are a key task, but most key tasks will be milestones
    - Key tasks are reflected in the Power BI project status report
- Publishing the schedule
    - After saving, publish the schedule for it to update status information and reports
- Deliverables
    - Deliverables need to be flagged in the schedule