Project and Schedule Movement

If a task was completed today, and the person updating the task didn't make any changes to the dates, why doesn't it show as completed today? Why is it that some tasks that were completed today show a start or finish date that is in the distant future or distant past? Or, you might have a schedule that is jumping around with every updated task and you aren't sure why. This article is an explanation of one area of the system that can affect this schedule movement (or lack thereof).

To understand the scheduling options that most directly affect the schedules movement, the Status Date setting needs to be understood. As a very brief definition, the Status Date is the date that you are using to determine the progress of the schedule. Or, it is the date you are using to answer the question "What was accomplished (or not accomplished) as of this date?" It is normally set to "na" which is the default for today's date.

Here is one way to look at it:
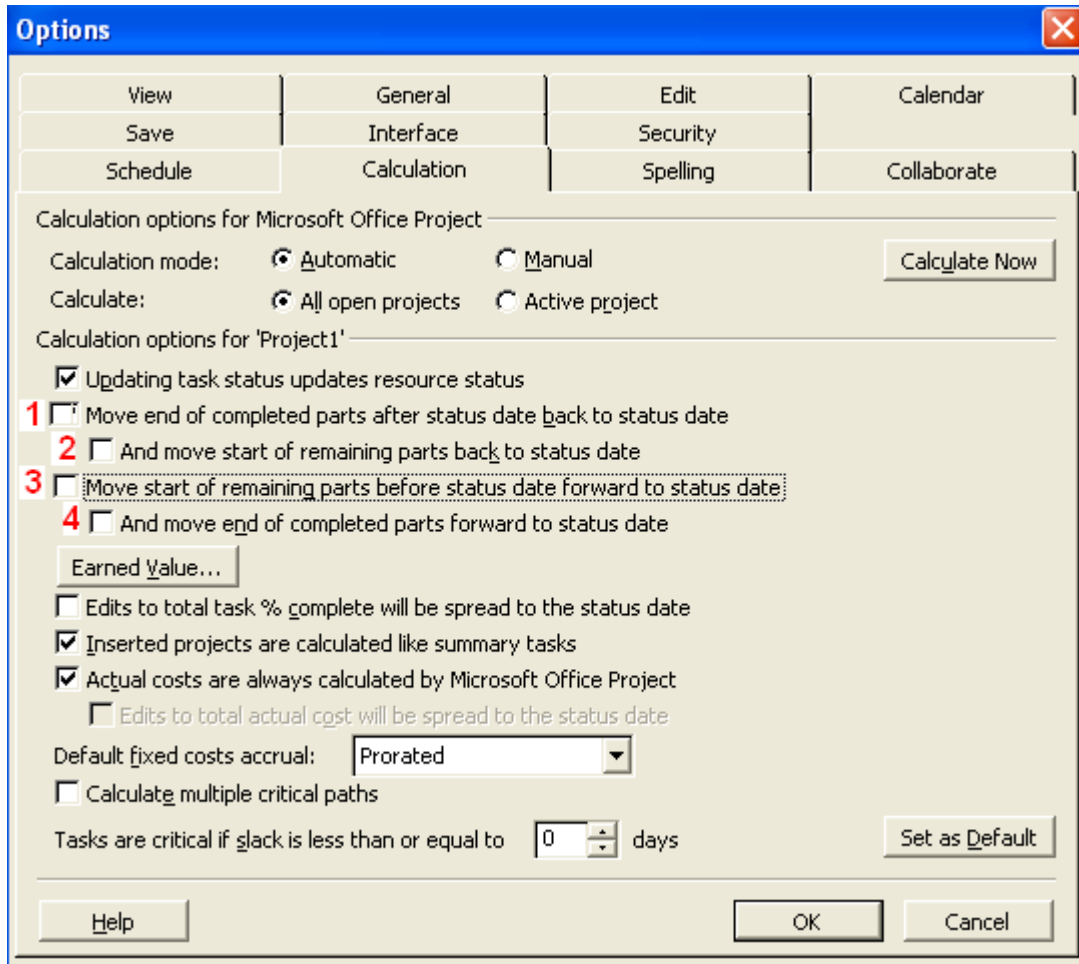Boxes 1 and 2 are if the Task is started early.
Boxes 3 and 4 are if the Task is started late.

Think of it this way: Box 1 is "What do you do with part of the task that is done early?"
Box 2 is "What do you do with the unfinished part of the task?"
Box 3 is "What do you do with what is left to do?"
Box 4 is "What do you do with the part of the task that is done late?"

Options dialog box — Calculation tab

Tabs: View | General | Edit | Calendar
Save | Interface | Security
Schedule | Calculation | Spelling | Collaborate

Calculation options for Microsoft Office Project

Calculation mode: ⊙ Automatic   ○ Manual   [Calculate Now]
Calculate: ⊙ All open projects   ○ Active project

Calculation options for 'Project1'
☑ Updating task status updates resource status
1 ☐ Move end of completed parts after status date back to status date
2 ☐ And move start of remaining parts back to status date
3 ☐ Move start of remaining parts before status date forward to status date
4 ☐ And move end of completed parts forward to status date
[Earned Value...]
☐ Edits to total task % complete will be spread to the status date
☑ Inserted projects are calculated like summary tasks
☑ Actual costs are always calculated by Microsoft Office Project
    ☐ Edits to total actual cost will be spread to the status date
Default fixed costs accrual: [Prorated ▼]
☐ Calculate multiple critical paths
Tasks are critical if slack is less than or equal to [0 ▲▼] days   [Set as Default]

[Help]   [OK]   [Cancel]

By default, Project does NOT change task start dates or adjust the remaining portions of tasks. These check boxes allow for that. Reminder: The status date is in the Project Information box.

The boxes work in pairs. Numbers **1** and **2** work together and **3** and **4** together.

Examples are below, but here is how **1** and **2** work. For number **1**: If the Status Date is 12/9/5 and a task start date is 12/14/5 and the duration is 4 days and the task actually starts on 12/7/5 the project will do the following: it will move the start date to 12/7/5, set the percent complete to 50%, split the task and put the start of the remaining work on 12/16. Now, if you **ALSO** select **2**, then Project moves the start of the remaining work to 12/9.
For number **3**, If the status date of 12/9/5 and a task with a start date of 12/1/5 and a duration of 4 days and the task actually starts on 12/7/5 then Project leaves the start date at 12/1/5, sets the percent complete to 50, schedules the start of the remaining work for 12/9 (again creating a split task). If number **4** is also selected: project does as above but **ALSO** moves the tasks actual start date to 12/7.
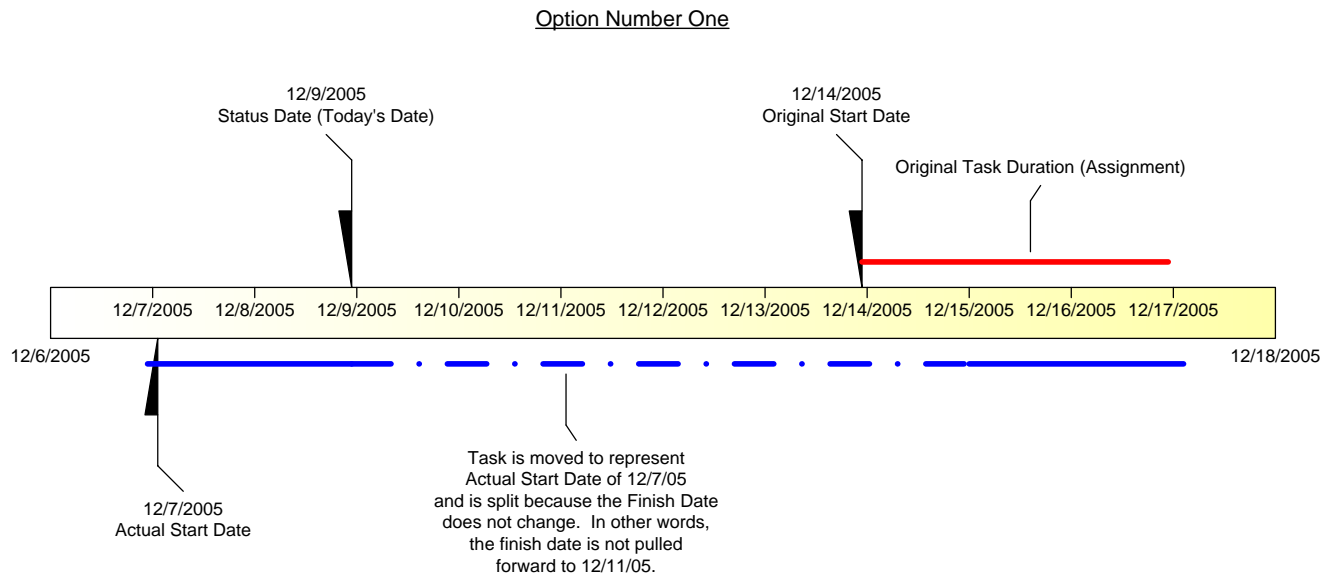
Example:

This is how numbers one and two look:

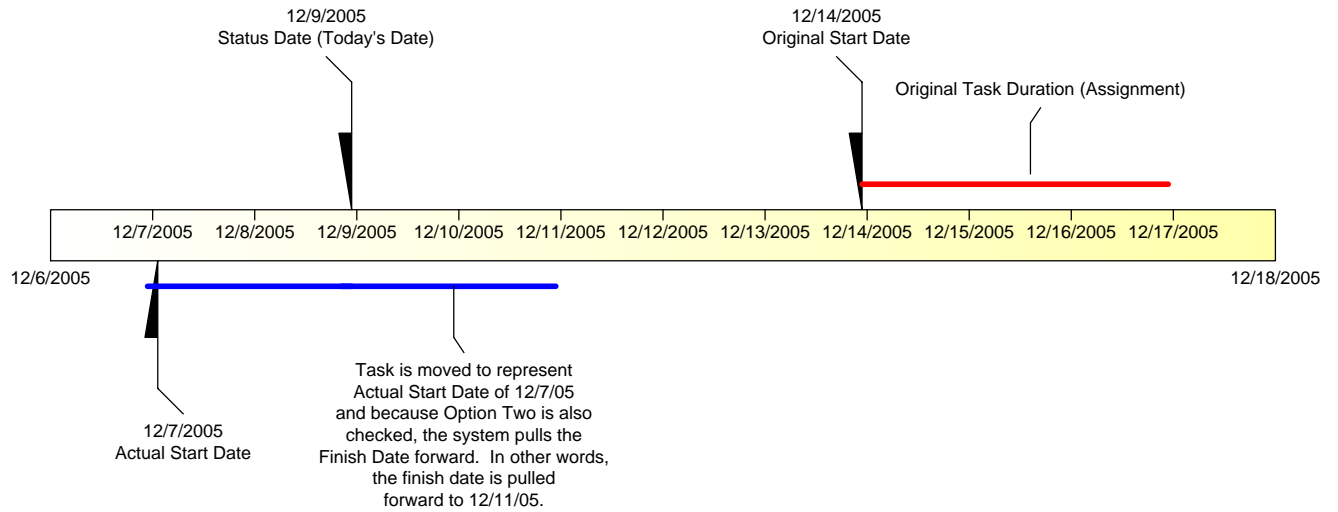Status Date (Today): 12/9/5

Start Date: 12/14/5

Duration: 4 days

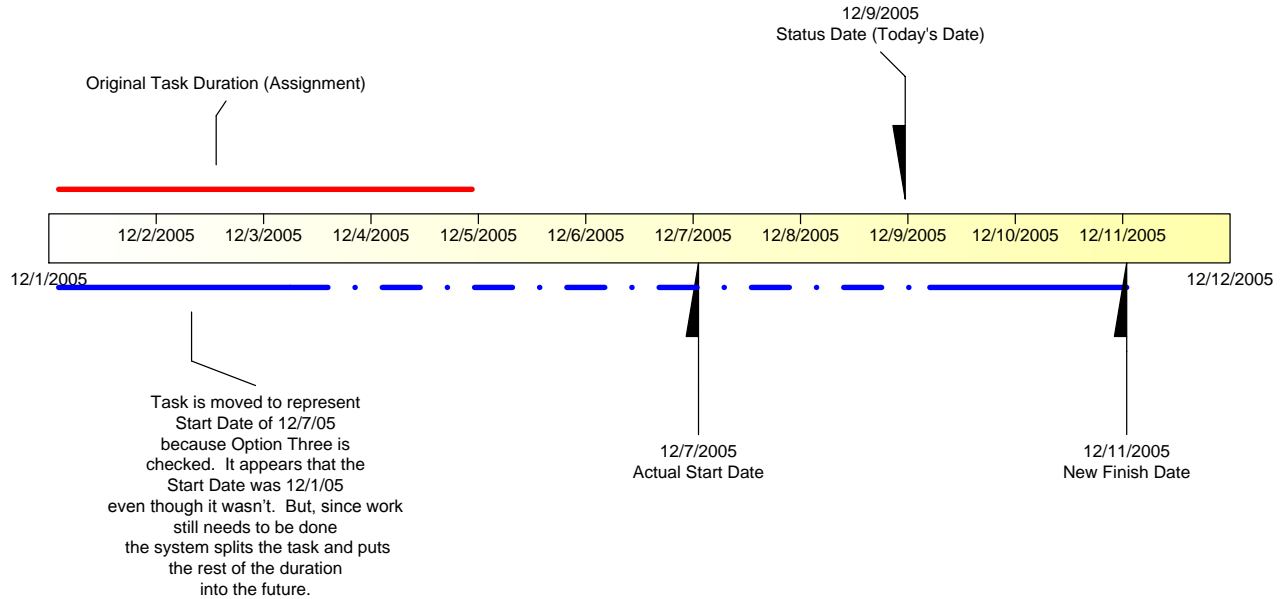Graphically, it would look like this for numbers one and two:

Option Number One

Option Number Two

12/9/2005
Status Date (Today's Date)

12/14/2005
Original Start Date

Original Task Duration (Assignment)

12/7/2005   12/8/2005   12/9/2005   12/10/2005   12/11/2005   12/12/2005   12/13/2005   12/14/2005   12/15/2005   12/16/2005   12/17/2005

12/6/2005

12/18/2005

12/7/2005
Actual Start Date

Task is moved to represent
Actual Start Date of 12/7/05
and because Option Two is also
checked, the system pulls the
Finish Date forward. In other words,
the finish date is pulled
forward to 12/11/05.

This is how Options Three and Four Look:
Status Date (Today): 12/9/5
Start Date: 12/1/5
Duration: 4 days

Option Number Three

12/9/2005
Status Date (Today's Date)

Original Task Duration (Assignment)

12/1/2005

| 12/2/2005 | 12/3/2005 | 12/4/2005 | 12/5/2005 | 12/6/2005 | 12/7/2005 | 12/8/2005 | 12/9/2005 | 12/10/2005 | 12/11/2005 |

12/12/2005

Task is moved to represent
Start Date of 12/7/05
because Option Three is
checked. It appears that the
Start Date was 12/1/05
even though it wasn't. But, since work
still needs to be done
the system splits the task and puts
the rest of the duration
into the future.

12/7/2005
Actual Start Date

12/11/2005
New Finish Date

Option Number Four

12/9/2005
Status Date (Today's Date)

Original Task Duration (Assignment)

12/1/2005

| 12/2/2005 | 12/3/2005 | 12/4/2005 | 12/5/2005 | 12/6/2005 | 12/7/2005 | 12/8/2005 | 12/9/2005 | 12/10/2005 | 12/11/2005 |

12/12/2005

12/7/2005
Actual Start Date

Task is moved to represent
Actual Start Date of 12/7/05
because Option Four is
checked. The entire duration
of the task is pulled to the Actual Start
Date and then the rest of the
duration of the task is placed
into the future.

12/11/2005
New Finish Date

This is the same thing, but directly from Microsoft's Help file:

Microsoft Project Help

- Define the default cost accrual method.
- Set preferences for critical task and critical path calculation.

▶ Dialog box location

Details
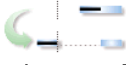
▶ Calculation options for Microsoft Office Project

▶ Status calculations

▼ Schedule adjustments for early and late tasks

In Project, progress is viewed and recorded as of the status date. By default, when you enter progress as percent complete or total work to date, Project uses the status date to determine where to place actual work and where to schedule remaining work. You can modify the default settings for how the status date is used for placing actual work and remaining work where you want, particularly when assignments are completed earlier or later than scheduled.

Using these controls is particularly useful when you want to see "ahead of schedule" progress lines. They're also useful for changing how earned value is accrued.

Note that these settings do not control the placement of actual and remaining work when you track progress by entering actual work by time period.
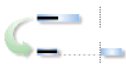
Move end of completed parts after status date back to status date   This check box is for tasks that were scheduled to start after the status date but actually started early. If this check box is selected, the completed portion of the task moves back to finish at the status date. If this check box is cleared, the completed portion is set to finish as previously scheduled. By default, this check box is cleared.
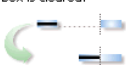
And move start of remaining parts back to status date   This check box is for tasks that were scheduled to start after the status date but actually started early. If this check box is selected, the remaining portion of the task moves back to start at the status date. If this check box is cleared, the remaining portion of the task is set to finish as previously scheduled. By default, this check box is cleared.

Move start of remaining parts before status date forward to status date   This check box is for tasks that were scheduled to start before the status date but actually started late. If this check box is selected, the remaining portion of the task moves forward to start at the status date. If this check box is cleared, the remaining portion of the task is set to start as previously scheduled. By default, this check box is cleared.

And move end of completed parts forward to status date   This check box is for tasks that were scheduled to finish before the status date but actually finished late. If this check box is selected, the completed portion of the task moves forward to finish at the status date. If this check box is cleared, the completed portion of the task is set to finish as previously scheduled. By default, this check box is cleared.

▶ Cost calculations

▶ Critical path calculations

start   4:39 PM