

TOPIC B

Set a Baseline

One of the final steps in planning a project is preserving your original project estimates so you will have data to compare actual progress with. In this topic, you will set a project baseline.

Baselines

A **baseline** is a version of a project plan against which progress is evaluated. It includes tasks, resources, assignments, and cost estimates. The baseline is a snapshot of the planned scope, time, and cost of a project. As the project is executed, you can compare actual scope, time, and cost against the baseline to measure how the project is performing. Here are some of the questions that can be answered.

Project Area	Monitoring Questions
Scope	<ul style="list-style-type: none"> • Are we doing the tasks we planned to do? • Are we doing more or different tasks than anticipated? • Are we doing fewer tasks than anticipated?
Time	<ul style="list-style-type: none"> • Are we behind schedule? • Are we on schedule? • Are we ahead of schedule?
Cost	<ul style="list-style-type: none"> • Are we under budget? • Are we on budget? • Are we over budget?

If your project is not performing as expected, you can take corrective action to finish the project according to scope, on time, and within budget. This is the monitoring and controlling function of project management.



Note: Using Microsoft Project to monitor and control your project is discussed in the *Microsoft® Project® 2019 (On-Premise or Online Editions): Part 2* course.

Microsoft Project and Baselines

In Microsoft® Project®, a baseline is a set of five data values for each task: start date, finish date, duration, work, and cost. You declare these parameters as **Baseline Start**, **Baseline Finish**, etc. when the original project plan is finalized; Project saves them in the **Baseline table**. As the project progresses, you compare actuals for each parameter against the baseline value to determine if you need to make changes to the project plan.

	Task Name	Baseline Dur.	Baseline Start	Baseline Finish	Baseline Work	Baseline Cost
0	My HR Manual Finalize	45.33 days	Mon 8/3/20	Tue 10/6/20	752 hrs	\$47,091.23
1	1 Begin Project	0 days	Mon 8/3/20	Mon 8/3/20	0 hrs	\$0.00
2	2 Research Phase	7 days	Mon 8/3/20	Tue 8/11/20	104 hrs	\$6,150.77
3	2.1 Review Existing HR Manual	1 day	Mon 8/3/20	Mon 8/3/20	8 hrs	\$576.92
4	2.2 Review Common Industry Practices	1 day	Tue 8/4/20	Tue 8/4/20	16 hrs	\$961.54
5	2.3 Review Government Regulations	3 days	Tue 8/4/20	Thu 8/6/20	48 hrs	\$3,073.85
6	2.4 Interview Department Heads	1 day	Tue 8/11/20	Tue 8/11/20	32 hrs	\$1,538.46

Figure 6-5: You can view the current baseline values in the Baseline table.

Because the baseline provides the reference points against which you compare actual project progress, the baseline should include your best estimates for task duration, start and finish dates, costs, and other project variables that you want to monitor. The baseline may also represent a contractual obligation for the project.

Baseline information that consistently differs from current data may indicate that your original plan is no longer accurate, possibly because the scope needs review or because the nature of the project has changed. If project stakeholders agree that the difference warrants it, you can modify or rework the baseline at any time during the project.

You may find that setting multiple baselines is especially useful for long projects or for projects in which the baseline is rendered irrelevant by significant changes to scheduled tasks or costs. Project enables you set up to 11 baselines. The best practice is to use **Baseline** (without a number) for the project plan when it is initially approved, and then to use **Baseline 1–10** when the project sponsor approves later changes to the project plan. For example, if your project has several phases, you can save a separate baseline at the end of each phase, to compare planned values against actual data throughout the life of the project. You capture the change by setting **Baseline 1**, then **Baseline 2**, and so forth.

The Set Baseline Dialog Box

You can easily set a project baseline by selecting the **Project** tab on the ribbon, finding the **Schedule** command group, selecting the **Set Baseline** button, and selecting the **Set Baseline** option. Selecting this option will display the **Set Baseline** dialog box.

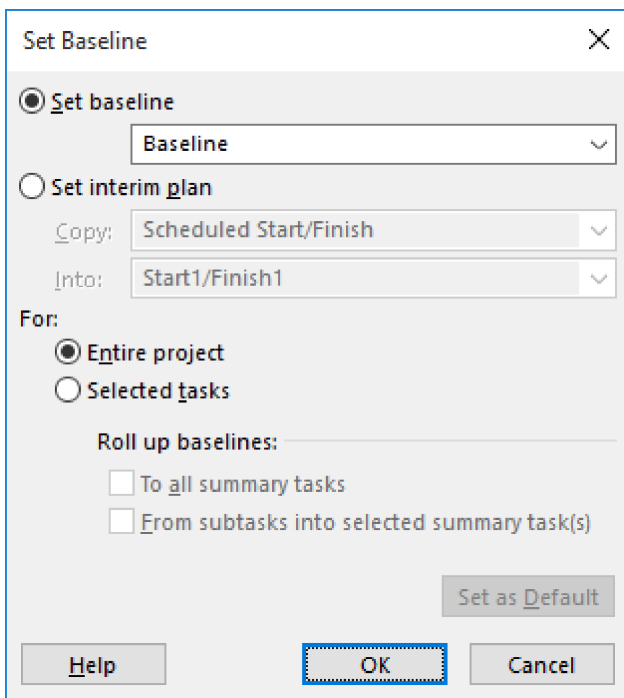





Figure 6–6: The *Set Baseline* dialog box.

	<p>Note: As a project manager, you should have a clearly defined process for evaluating and approving changes to the project baseline. The positive and negative effects of potential changes to project scope, time, or cost must be carefully considered before implementing them.</p>
	<p>Note: To learn more about saving a baseline, check out the Spotlight on Baselining a Project presentation from the Spotlight tile on the CHOICE Course screen.</p>
	<p>Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Set a Baseline.</p>

ACTIVITY 6-2

Setting a Baseline

Before You Begin

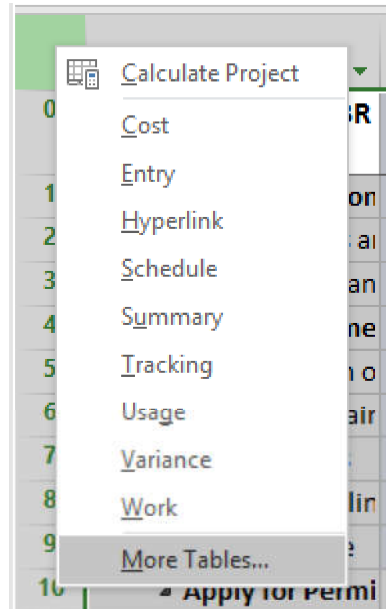
The **My HR Manual Finalize.mpp** file is open.

Scenario

Now that you have optimized your project plan, it's time to save the baseline so that you can compare progress against the plan as you execute the project. You create a new baseline.

1. Display the **Baseline** table.

- a) Right-click the **Select Table** button (the empty area in the top left of the **Task Entry** table.)



- b) Select **More Tables**.

- c) In the **More Tables** dialog box, select **Baseline** and then select **Apply**.

Verify that the **Baseline** table appears, with empty values in the **Baseline** fields.

	Task Name	Baseline Dur.	Baseline Start	Baseline Finish	Baseline Work	Baseline Cost
0	My HR Manual Finalize	0 days	NA	NA	0 hrs	\$0.00
1	1 Begin Project	0 days	NA	NA	0 hrs	\$0.00
2	2 Research Phase	0 days	NA	NA	0 hrs	\$0.00
3	2.1 Review Existing HR Manual	0 days	NA	NA	0 hrs	\$0.00
4	2.2 Review Common Industry Practices	0 days	NA	NA	0 hrs	\$0.00
5	2.3 Review Government Regulations	0 days	NA	NA	0 hrs	\$0.00
6	2.4 Interview Department Heads	0 days	NA	NA	0 hrs	\$0.00

2. Set a baseline for the current plan.

- a) Select **Project→Set Baseline**.
Verify that **Set Baseline** is selected and **Entire project** is selected.
- b) Select **OK**.
Verify the values in the **Baseline** table.

	Task Name	Baseline Dur.	Baseline Start	Baseline Finish	Baseline Work	Baseline Cost
0	▲ My HR Manual Finalize	45.33 days	Mon 8/3/20	Tue 10/6/20	752 hrs	\$47,091.23
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3. Save the file.

- a) Select **File→Save**.
- b) Leave the file open.