

TOPIC E

Update a Baseline

As the project plan is updated, you may find it necessary to update your baseline to reflect the new plan. By updating the baseline properly, you can still retain information about the original plan, but still track progress against the updated plan. By keeping a record of baselines, you will be able to analyze performance to improve future projects.

The Set Baseline Dialog Box

You can easily set a new 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. Microsoft Project allows you to 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 the project sponsor approves the addition of several new project tasks a month into project execution, you should capture the change by setting Baseline 1.

You can also use the **Set Baseline** dialog box to take a snapshot of interim plans or baseline selected tasks rather than the entire project. If your project plan has summary tasks and subtasks, you can use the dialog box to specify how you want baselines handled between the summary tasks and subtasks. Finally, you can use **Set as Default** to save your baseline preferences for selected tasks.

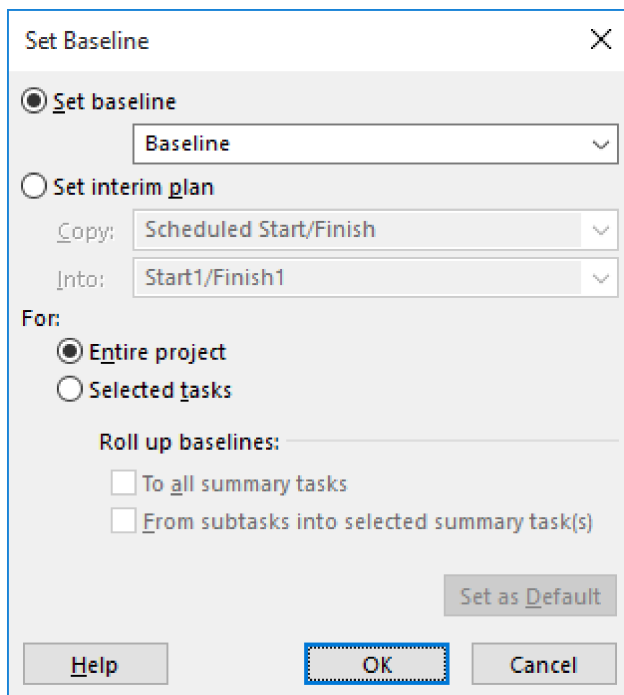


Figure 1–18: Use the Set Baseline dialog box to set a new baseline.

Interim Plans

An *interim plan* is a snapshot of the current project start dates and end dates that you can use to compare against the project baseline to see how the project is progressing. You can save up to 10 interim plans in a project plan.

If you need to keep records of extensive project data during the execution phase, it is a good idea to set multiple baselines instead of using interim plans. For example, you may want to set a baseline at each major milestone. Then, if you need to save only task start dates and finish dates, you can set multiple interim plans. For example, you may want to set an interim plan on a monthly or quarterly basis.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Update a Baseline.

ACTIVITY 1–5

Updating a Baseline

Data File

C:\091099Data\Updating a Project Plan\HR Manual Baseline_1.mpp

Before You Begin

Microsoft Project is open.

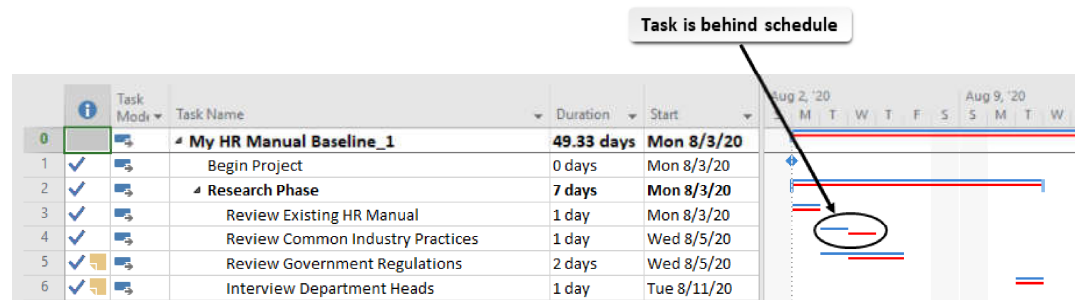
Scenario

It is now September 11, 2020, and since the last update several tasks have been completed. Your team is almost finished with the Development Phase of the project. You decide to update the baseline, so you can track the project's progress from this point forward.

1. Open the **HR Manual Baseline_1.mpp** project plan file.
 - a) Select **File→Open**, then select **Browse**.
 - b) Navigate to the **C:\091099Data\Updating a Project Plan** folder containing your class files.
 - c) Select **HR Manual Baseline_1.mpp** and select **Open**.
2. Set the status date to **September 11, 2020**.
 - a) Select **Project→Status Date**.
 - b) In the **Status Date** dialog box, in the **Select Date** field, enter **9/11/2020**, and then select **OK**.
Verify that the **Status Date** value is **9/11/20**.
3. Set a new baseline as **Baseline 1**.
 - a) Select **Project→Set Baseline**.
 - b) In the menu, select **Set Baseline**.
 - c) In the **Set Baseline** dialog box, verify that the **Set Baseline** radio button is selected, and from the drop-down field, select **Baseline 1**.
 - d) Select **OK** to close the dialog box.
4. Compare the baselines.
 - a) Select **View→Other Views**, then select **More Views**.
 - b) In the menu, select **Multiple Baselines Gantt**.
 - c) Select **Apply**.

- d) Select **Begin Project**, then select **Task→Scroll to Task**.

The blue Gantt bars represent the original baseline, and the red Gantt bars represent Baseline 1. If a task's red bar extends to the right of its blue bar (for example, **Review Common Industry Practices**), the task is behind schedule with respect to the original baseline.



5. Save the file as *My HR Manual Baseline_1.mpp* and close the file.

Summary

In this lesson, you updated your project plan with task progress information as work on the project progressed.

What are the potential consequences if a plan is not updated regularly throughout the course of a project?

In what situations might you split a task?



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