

# Anyplan<sup>®</sup>: Baselineing, Progress and Earned Value

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## Introduction

Anyplan is a new, innovative enterprise planning software for project, manufacturing and maintenance management and planning. All processes are planned in the same network (Smartnet®) using the same resources and calendars. Anyplan is an in-memory solution and all plans and planning data are always up-to-date without the need for batch processing.

### INTENDED AUDIENCE

This White Paper is intended for every planner who struggles with baselining and progressing their projects and who have problems displaying earned value curves.

Note also, that none of the functionality is limited to one project. Using the Anyplan portfolio module, planners can easily baseline or report across projects, or displaying earned value curves for any number of projects or departments (resources).

### RELATED READING

Please read the “Anyplan® Product Overview” White Paper for a general view of Anyplan® product features or see [www.anyplan.co](http://www.anyplan.co).

### LATEST RELEASE

The latest release is Anyplan V4.0

## Enterprise planning

Anyplan is built for enterprise planning. Enterprises benefit from having a uniform way of planning i.e. none of the project planners should be allowed to build project plans, create baselines or progress a project in a way that does not follow the standards set by the enterprise.

This way planners can move from project to project and still recognize what is going on.

Anyplan customers have benefited from such an approach and they have significant savings in staff and workload by streamlining the process with consistent, high-quality planning.

### ACCESS CONTROL AND USER RIGHTS

An aspect organizing planning is to make sure that the right people have access to the right information at the right time.

All elements in Anyplan, from resources, calendars to projects, work packages, activities and planning functionality like scheduling and baselining can be controlled in detailed. Users either have full access, can see data but not change, or cannot see the elements in question at all.

By integrating with e.g. Microsoft Active Directory (AD) it is easy to set up user groups and access levels.

### COLLABORATION

Anyplan is a multi-user system. Any planner can work with any project, and multiple planners can easily participate in the same project at the same time. By using the patented “Xymphonic” technology Anyplan controls changes by all users.

Anyplan automatically locks a project, a work package or individual activities based on what users are doing.

In Figure 1 we show an example on how

-  A project and a work package (WBS parent) is partly locked, due to one or more other planners with unsaved changes.
-  Activities are unlocked  
Nobody has made changes to these activities (or project or work packages). Any planner can edit these activities.
-  Activities are locked  
Another planner has made changes to this specific activity. Until the planner saves these changes this activity is locked to prevent contradictory changes.
-  An activity needs refreshing  
After other planners have completed and saved their changes, your are notified that the project needs updating in order to unlock items

Name	Start	Finish
▼ Project1	16.01.2014	15.04.2014
▼ SP1	16.01.2014	25.03.2014
SP1-6000	16.01.2014	27.01.2014
SP1-6200	31.01.2014	12.03.2014
SP1-7020	12.03.2014	12.03.2014
SP1-7030	13.03.2014	21.03.2014
SP1-7050	24.03.2014	24.03.2014

Figure 1 Lock status

Some actions such as scheduling or baselining the entire project, require complete access to the project. Planners can open and lock a project to have complete control, or if no other users have made any changes, just schedule the project. Anyplan automatically locks the project for other users until you save or discard the changes.

## Baselining

### BASELINE OVERVIEW

In Anyplan baseline data is always saved with the project. There is no need to “save (a project) as” a baseline, or to open a previously saved baseline in order to compare the project against baseline data.

The need for saving a baseline complicates the planning process and makes it easier to make errors when reporting on a project.

It is well known that contractual baselines are set quite early in a project. The project plan may not be complete and later changes may come.

Changes that comes as part of a natural development (improvement) of the plan ought to be included in the contract baseline, even if that means baselining or re-baselining parts of a project.

Variation (“Change”) orders have to be treated in a different manner and are discussed in a separate white paper. Please see section “More information?”.

### SNAPSHOTS

Snapshots are used to make a “backup” of the project as it is right now.

Figure 2 shows the Snapshot panel located at the project level. The panel contains a list of any snapshots and also contains the button to (save any unsaved changes and) create a new snapshot.

Restore a project or baseline data in order to revert to a previous version.

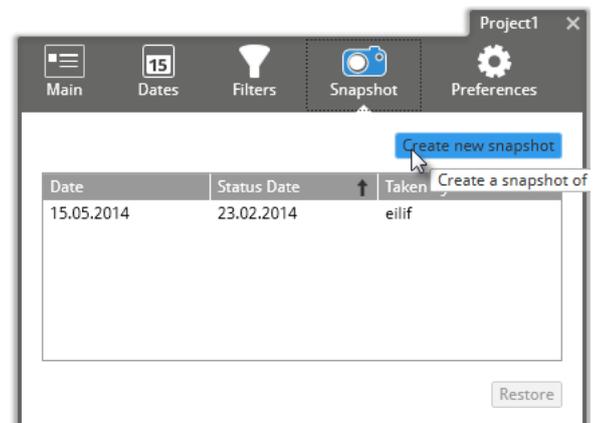


Figure 2 Snapshot panel

### MULTIPLE BASELINES

Anyplan can have as many baselines as needed.

Please note that multiple baselines are not the same as “saving as” a baseline, but different sets of baseline data used e.g. for contractual reporting and in-house follow up.

In an enterprise environment Anyplan is configured to use a certain number of baselines. When a planner has opened a project, switching from one baseline to another takes a few seconds.

E.g. a project with contract (“Original”) and internal baseline (“Current”). When opened, the project is displayed with the default baseline data (“Original”). To switch baseline the planner opens the drop down list and selects another baseline. The drop down list is seen on all project views (Gantt or any chart).

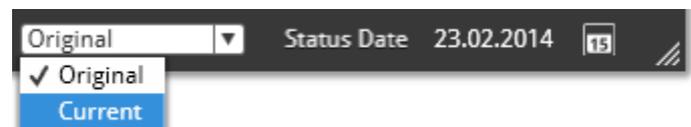


Figure 3 Switch baseline

### BASELINE

A planner can set a baseline, or re-baseline, the entire project in no time at all.

The procedure is to select the project (bar) or any parts of the project, and then just hit the baseline action or short-cut key “F8”.

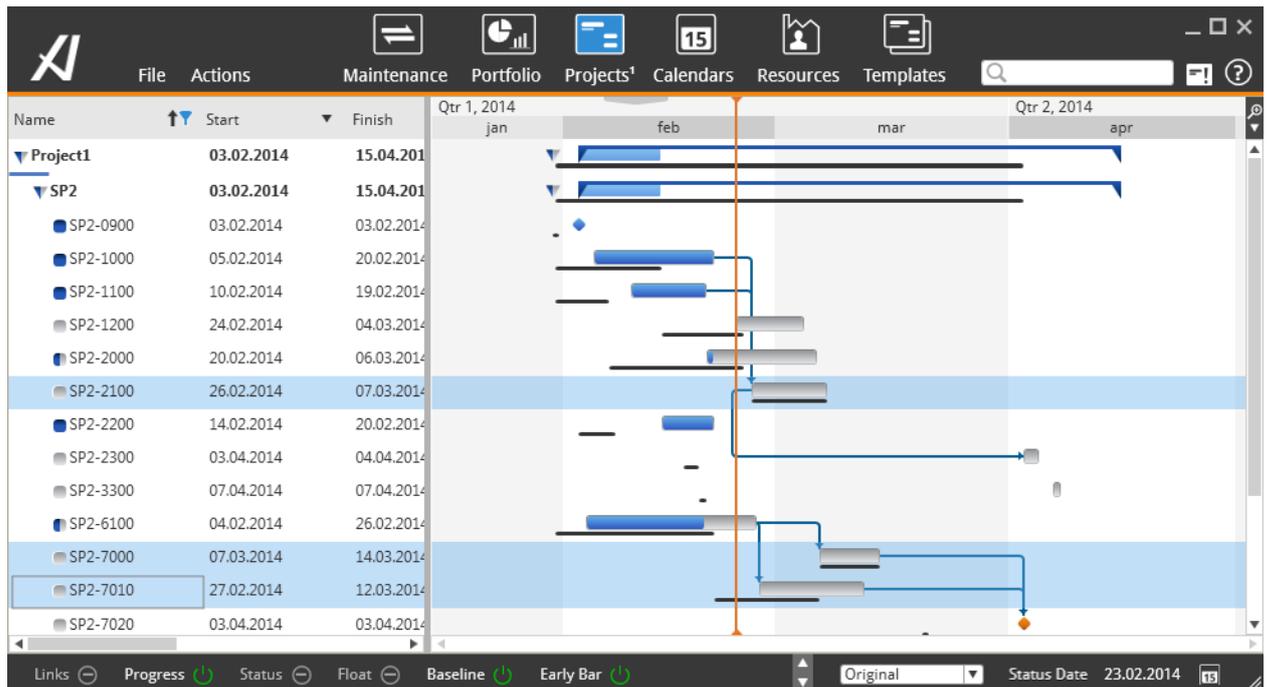


Figure 4 Select activities to baseline

Figure 4 above illustrates how three activities have been selected for re-baselining.

### Baseline options

Using a short-cut key may not always update the baseline as needed. Depending on the state of the project more specific baseline commands may be needed. "Shift+F8" opens the baseline panel.

The options are:

- Set/update baseline      All baseline data of the selected item(s) is updated.
- ...Keep budgets          Re-baselines the dates only. Any planned cost/qty is left as is.
- ... Keep dates            Re-baselines the resource data only. The planned dates do not change, even if the activity has moved.
- Update profiles...        If resource profiling or distributions are used, this option keeps both the resource values and planned dates, but updates the planned resource usage profile.
- Clear baseline            Clears the baseline from the selected items.

The baseline commands work on the active baseline by default, but can be configured to update more than one.

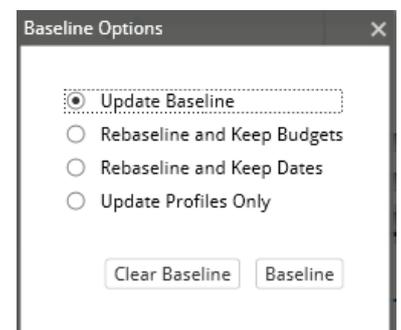


Figure 5 Baseline options

## Reporting progress at cutoff

“Anyplan Reporting” is a set of tools used for efficient progress reporting in enterprises. When used, reporting is paperless, with improved quality and timeliness regardless of where people are located. In this article we focus on how a planner can manually update a project at cutoff in Anyplan.

### START AN ACTIVITY

To start an activity, open the Progress panel.

In the section with “Current” dates, just click the tick box next to the start date. If the date is not quite right, enter a new start date manually or using the date picker before starting the activity.

### ADD PROGRESS

In this example we assume physical % complete is used.

After starting the activity, look to the right, bottom corner of the progress panel. Enter the new % complete and click add progress.

Note that remaining duration and remaining resource usage may be changed based on the new % complete. Settings for calculating remaining duration can be found in the progress panel and the settings for remaining resource usage in the Resources panel.

### PROGRESS HISTORY

Progress history is needed for all earned value analysis and for the S-curves. Some planning systems require that periodic snapshots are saved to store progress as of the current date.

Irrespective of the progress methods used, Anyplan always saves progress history with the project.

When opening the progress panel planners can easily see how an activity has been progressed over time.

Irrespective of the progress method used, any past % completes are stored in the progress history.

#### *Rolled-up progress (EV%)*

Progress at parent levels are calculated based on activity progress and the rolled-up progress method. Progress can be calculated based on cost, qty (e.g. man-hours) or activity weighting.

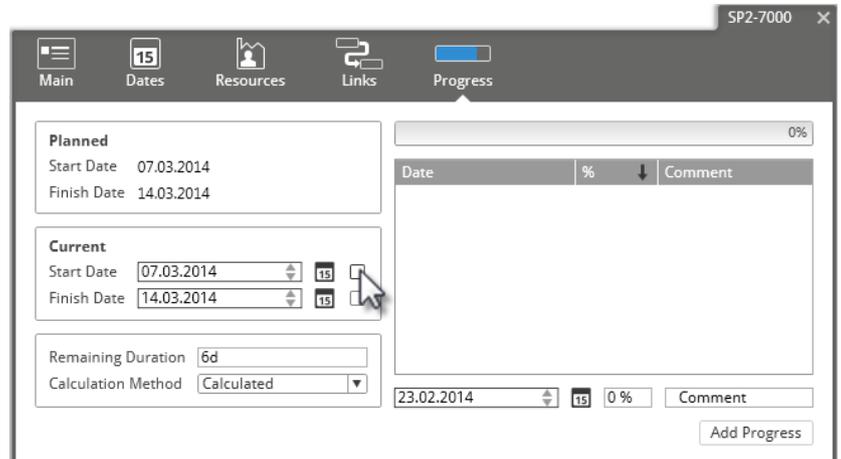


Figure 6 Progress panel

Date	%	Comment
23.02.2014	25,0	
19.02.2014	0,0	

30.03.2014    0 %    Comment    Add Progress

Figure 7 Progress history

## REPORTING ACTUALS AT CUTOFF

Actual resource usage is normally recorded at activity level. If this is not possible then actuals may be recorded at a parent level, and thereby contain actual data for more than one activity.

Similar to progress history, Anyplan also keeps the history of resource usages.

The history is required in order to create S-curves and to show correct actual usage in a histogram.

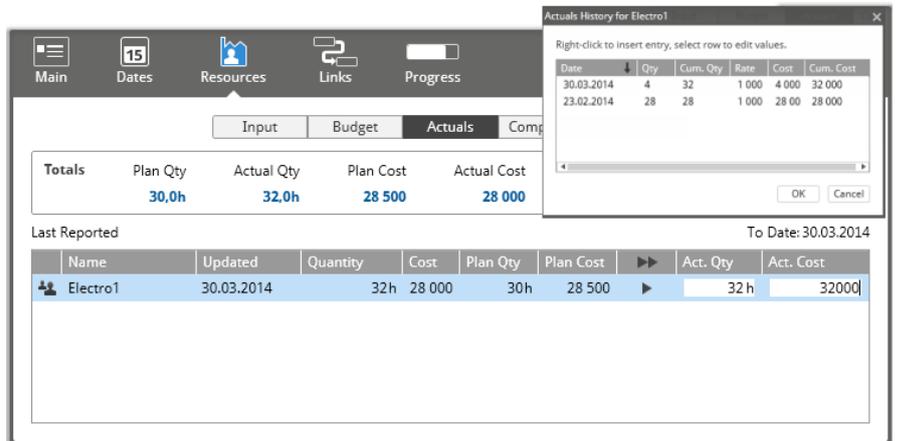


Figure 8 Actual resource usage with actual history

## Earned value (EV)

Earned value is one of the fundamental features of Anyplan. No matter what data a planner is looking at, in any context, EV information is always available.

For example, a portfolio report for one department or a group of projects, or in a project after filtering away some or many of the work packages.

## EV ANALYSIS

The project EV data can be seen in the Gantt chart. Select any of the "EV columns" to analyze the project status.

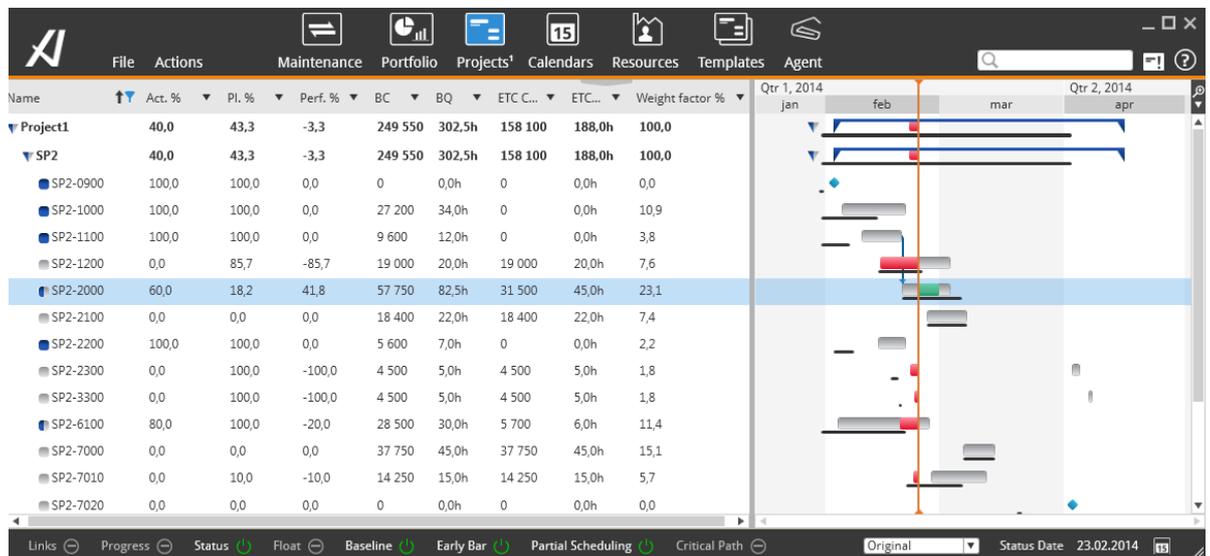


Figure 9 Earned value data in the Gantt chart with Status bars

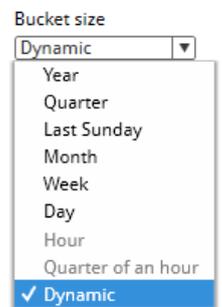
Status bar	Displayed in the chart. Highlights activities behind and ahead of schedule. EV performance at parent levels.
Act%	Reported % complete as of status date (or data date). At parent levels, the EV % complete based on the active baseline.
PI %	Planned % complete based on the active baseline.
Perf %	The difference between actual and planned % complete
BC/BQ	Planned or budgeted cost and quantity at completion.
ETC	ETC cost and qty.
Weight factor	Calculated or set weight factor. The example shows calculated weight factors based on cost.

## S-CURVES

The S-curves are always available for one project, a sub-project, activity or any combination of activities or projects.

The curves are presented using the default (calculated) buckets or the bucket chosen by the planner.

A drop down menu is available to switch to another data bucket.



## EV CURVES

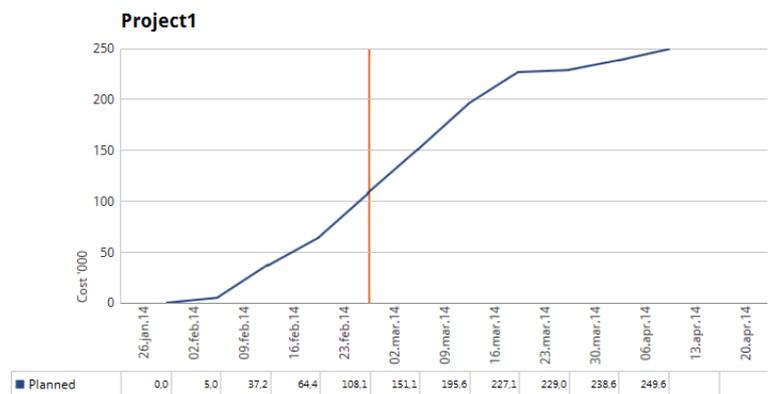
The EV or S-curves can be calculated based on cost, qty (man-hours) and other units of measure.

EV number per data bucket can be displayed in e.g. cost or % of total cost. **Figure 10 Chart buckets**

This feature is very useful when needing to send S-curves to customers. It may be important that the customer see the curves, but not what the project costs.

## Planned curve (BCWS)

The planned curve is calculated based on the active baseline.



**Figure 11 Planned cost curve**

## Earned values curve (BCWP)

The EV curve is calculated using the same baseline as the planned curve.

Use the switch in the chart status bar to stop the curve at status date.

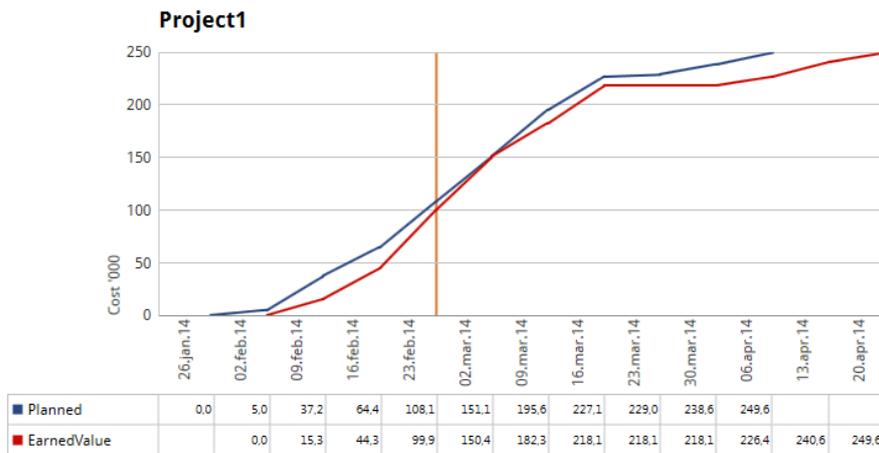


Figure 12 Panned and EV curves

## Actuals and forecast curve (ACWP)

The Actuals and Forecast curves consist of the two elements that together form the ACWP curve:

- Actual values
- Forecast values

The word “values” here refers to whatever value is used to calculate the S-curves.



Figure 13 EV curves

Notice that the status bar at the bottom of the chart contains switches to control how the curves are drawn, scaling of the values and to switch baseline.

## More information?

Did you find this white paper interesting?

Please do not hesitate to ask us for more information on topics such as:

- [Anyplan: Keys to Successful Earned Value](#)
- Anyplan Reporting
- Anyplan Portfolio
- Baselineing and Variation Orders
- Snapshots
- Scenario planning

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For more information please contact Xymphonic Systems:

MAILING ADDRESS:

Xymphonic Systems AS  
P.O Box 747  
N-4666 KRISTIANSAND, Norway

Email: [roger.berntsen@xymphonic.com](mailto:roger.berntsen@xymphonic.com)

Telephone: + 47 90 581840