1.0 PURPOSE

This guideline describes the requirements for Contractor Schedules. When a Request for Proposal (RFP) is issued by Contract Administration for Project work, a detailed schedule is required from all contractors. The Schedule should be based on documentation supplied by Contract Administration, the methodology for the work, all safety aspects and must clearly represent the scope of the project.

Reference documentation

The following documents were used in the development of this document or are related to it. The most recent revision shall be used.

NAV-TP-0172	Consultant / Contractor Schedule Template
NAV-LP-0107	Service Requisition Form (SRF)

2.0 CONTEXT

All ERM project schedules will be produced using Microsoft Project 2010 or compatible versions.

Schedules may be produced via the Projects Database or as offline Microsoft Project Schedules. The same information is required in the Schedule regardless of whether the schedule is held within the database or externally. The Contract Schedule is a portion of the overall Project Work Breakdown Structure and represents the Purchase Order level of the overall schedule.

If an initial Schedule is produced out of the Projects database it should be supplied to the Contracting Party as a starting point to build their schedule.

3.0 BASIS OF SCHEDULE

Ideally the initial Contract schedule is developed within the Database and exported as a MS Project file attached to the Requisition based on the details within the SRF form. The Contracting Party is then asked to update the schedule to provide more detail of the tasks, as appropriate. The Contracting Party shall then return the updated schedule as part of their proposal.

Upon award, the Contracting Party shall provide more detailed scheduling information, either using the original template file issued with the proposal or an updated version supplied by the Vale Project Team.

The expected details should include:

- The tasks, as entered on the SRF
- sub-tasks, as required (include as many levels of sub-tasks as needed)
- start dates and task / sub-task durations, with constraint dates as required
- milestone activities
- resource names
- predecessor relationships, as required

The line items in the SRF should be viewed as **summary tasks** and must not be modified by the Contracting Party.

4.0 SCHEDULE DETAILS - GENERAL

The Project Schedule should have the following basic components (as per template provided)

4.1 WORK BREAKDOWN STRUCTURE:

When building the WBS, consider the most important aspects of the project; in some cases the WBS will be focused on the schedule or sequence of the work. The WBS should outline a logical progression of activities needed to complete the project.

If using the Project Database the Work Number Column aligns with the WBS for the project. Microsoft Project also creates its own “WBS” within the software during the creation of the schedule file; this numbering is not used when the schedule is generated from the Database.

4.2 PROJECT LEVEL:

This is the name of the top level of work within the WBS. This is the name of the parent project, where applicable. Otherwise this is the name of the project.

4.3 WORK ITEM LEVEL (PO LEVEL):

This is the name of the level of work within the WBS that the Purchase Order has been issued against. Depending on the complexity of the project there may be one or many Work Items within the Contract. The Work Items are defined at the Purchase Order Level of the WBS.

4.4 TASK:

This is the name of the next level of work within the WBS. Depending on the complexity of the project there may be many tasks. The Tasks are defined as the Purchase Order Line Item Level of the SRF. Estimated costs are rolled up from the Task or Subtasks to the Work Item.

4.5 SUB-TASK:

This is the name of the next level of work within the work breakdown structure. Sub-Tasks are used for Scheduling only. There may be many Sub-tasks depending on the complexity of the schedule.

4.6 DURATION:

This is the length of time in which the work will be done. This can be expressed in hours, days, weeks or months. Duration does not define the effort needed to perform the job just how long it takes.

4.7 START DATE:

This is the date that the task starts at. In most cases the preceding work defines when the next task can be completed.

4.8 FINISH DATE:

This is the date at which the task is complete. This is calculated as the Start Date plus the Duration. This is also dependent on which calendar you use for the project. (ie 7/24 vs 5/40 calendar)

4.9 PREDECESSORS:

Define which task which must start or finish before the next task can take place.

4.10 RESOURCE NAME:

This is the name of the person or group responsible for completing the assigned task.

4.11 PERCENT COMPLETE:

This is tracked as the Project moves through to completion.

5.0 UPDATE REQUIREMENTS

During the planning and execution phase of a project updates should be made on a weekly basis as a minimum. However, during a PMP, updates are required after every shift. If the Schedule has been set up correctly, the Contracting Party will only need to send it to the Vale representative who can update the % complete of the project by exporting the information back to the PMP database.

6.0 APPENDICES

Appendix A: Revision and Transition Notes

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Revision notes describe: what was changed, why it was changed, and the plan to implement the change, including whether changes are retroactive)

Revision Control Information

Rev #	Date	Nature of Change	Page inserted, replaced, revised or cancelled	Approved by document owner
1	Dec 18/13		Development for Project Navigator	T.Hirschfeld
2	May 6/18	Minor	Aligned terminology from PMO to ERM	