

# LEVEL OF EFFORT (LOE) TASKS

Handling Management or Long Duration Tasks with  
**Task Type LOE with Auto-expand**

# A-dato

High Performance Delivered

# Introduction Task Type “Level of Effort” (LOE)

*Typically long duration tasks to include for example management and coordination activities*

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- LOE Tasks have a different “scheduling” behavior and characteristics:
  - Duration may span a phase or the complete project duration, and also increases when a project duration increases
  - Coordination or Management start with the start of a project or phase, rather than as late as possible (per CCPM scheduling)
  - Are excluded from the Critical Chain scheduling: LOE Tasks are never “Critical”
  - Typically represent an average “load “(e.g. 20 %) over a longer time period
  
- LYNX Task Type “Level of Effort” with **Auto expand** advantages:
  - Allows to track also Management Effort and Resource load
    - Resulting in a complete picture of all tasks and effort within a project
  - Automates the Etc process



# Task Management for LOE Tasks with Auto expand

## *Summary*

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- For the Task Manager role:
  - Status of LOE Tasks should be set to started
  - The Etc is counted down automatically until 0 remaining duration
  - Once the Etc is 0, status of the LOE task should be set to “Completed”
  - Use the “Unit percentage” to control the remaining work as is expected
  
- For the Project Manager role:
  - Can be added in the schedule, like normal tasks
  - Monitor the “unit-percentages” for getting an adequate resource load



# Select Task Type Level of Effort and Auto expand

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The screenshot displays the Microsoft Project interface for a project named "Project with LOE and Auto-expand". The main view is a Gantt chart showing a task hierarchy. Task 2, "Coordination LOE", is highlighted. A green dashed box highlights the task name in the task list and the task name in the task bar. A green arrow points from the task name in the task bar to the "Tasktype" dropdown menu in the task information pane. The "Tasktype" dropdown is open, showing "Level of effort" selected. Another green dashed box highlights the "Auto expand" checkbox, which is checked. A third green dashed box highlights the "Level of effort" option in the dropdown menu. The task information pane shows the following details for "Coordination LOE":

- Duration: 20 days
- ETTC: 24 days
- Priority: 500
- Tasktype: Level of effort
- Auto complete: Updated: n/a
- Auto expand:
- Rollup:
- Fixed duration:
- Critical chain task?:

The task manager is set to "A-dato Consulting, A-dato". The task is currently "Not started".

# Control Estimated "Workload" by setting the unit percentage

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Duration (24 days) is automatically calculated from the length of the chain between T1 and T7

The screenshot displays a project management tool interface. On the left, a task list table shows the following tasks and durations:

#	ID	Name	Duration
1	LOE-T1	T0	[0 days]
2	LOE-T3	Coordination LOE	[24 days]
3	LOE-T2	T1	[4 days]
4	LOE-T4	T2	[10 days]
5	LOE-T5	T3	[10 days]
6	LOE-T6	Integration	[10 days]
7	LOE-T7	Integration Completed	[0 days]
8	LOE-T11	Installation	[10 days]
9	LOE-T12	Handover	[10 days]

The main area shows a Gantt chart with a timeline from Nov 18, 2017, to Dec 11, 2017. A task bar for 'Coordination LOE' is highlighted in blue, spanning from Nov 25 to Dec 19. Below the Gantt chart, the task details for 'Coordination LOE' are shown. The 'Requirements' table is as follows:

Resource/Skill	Estimated time	Units	Status
S: ProjectManager [*Sven Cramer:48h]	level of effort - 48h	25%	Not started

The 'Team members' table is empty, with a message below it: 'Team cannot be set, skill is not a team'.

The effort is calculated from the unit %: 25 % of 24 days = 48 hrs (assuming 40 hours per week)

# LOE Resource Load

Project with LOE and Auto-expand

Save Cards view Print **Resource load** Release Prop

#	ID	Name	Prj duration
1	LOE-T1	T0	[0 days]
2	LOE-T3	Coordination LOE	[24 days]
3	LOE-T2	T1	[4 days]
4	LOE-T4	T2	[4 days]

2 LOE-T3 Coordination LOE

Not started  
Started  
Completed  
Paused  
Aborted  
 Ready to start?

Messages (0) General Constraint Dates Resource requirements Dependencies Custom fields Visual Tracking Workpackage

Requirements (edit)

Resource/Skill	Estimated time	Units	Status	Estimate
S: Project Manager [Sven Cramer:48h]	level of effort - 48h	25%	Not started	

Team members

Skill	Resource	Units

Team cannot be set, skill is not a team

Resource load - Project with LOE and Auto-expand

Options

Range Project Task Week 4 weeks **Quarter** 6 Months Year Other

FILTER Resource Mgr. Skill Experience Product Group \_Location

Reload all all none none none

Resources (65): Outsourced,24 hour Production Machine,ASIC Analog Designer,ASIC Analog IP Designer,ASIC Analog Layouter,ASIC Architect,ASIC Dig

Total work: 512h Projects: 0 Tasks: 7

Sep 2017 18 25 Oct 2017 02 09 16 23 30 Nov 2017 06 13 20 27 Dec 2017 04 11 18 25

**Project Manager** Average: 9% Wdrk: 48h/0h Unallocated: 472h

100%  
0%  
Resource: Sven Cramer

**System Engineer** Average: 5% Wdrk: 80h/80h Unallocated: 1480h

100%  
0%  
Resources (3): BarryHuberts,Broeksteeg Mark,de BoerTjarko

Resource load /Resource gantt/

A load of 25 % is displayed over 24 days (= 48 hours)

# LOE Task Management

*LOE Tasks have standard Task Behavior related to dependencies*

**LYNX checks dependencies to determine "Ready to Start" status also for LOE Tasks!**

#	ID	Name	Buffers	Prj duration
1	LOE-T1	T0		
2	LOE-T3	Coordination LOE	0% n/a	[24 days]
3	LOE-T2	T1	0% n/a	[4 days]
4	LOE-T4	T2	0% 0%	[4 days]
5	LOE-T18	[FB] T2	n/a 0%	
6	LOE-T5	T3	0% n/a	[10 days]
7	LOE-T6	Integration	0% n/a	[10 days]
8	LOE-T7	Integration Completed	0% n/a	[0 days]
9	LOE-T11	Installation	0% n/a	[10 days]
10	LOE-T12	Handover	0% n/a	[10 days]
11	LOE-T17	Project buffer	0% n/a	

**The successor task is to be started, when the LOE task is marked as completed.**

**Also an LOE task is only to be started when it is ready Ready to Start.**

#	Successor	Relation
8	Integration Completed	Finish -> Start

Ready to start?

# Ettc (Estimated Time To Complete) behavior of LOE Task

*Auto expand updates Ettc automatically!*

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Duration of the LOE Task reduced to 20 days, because Task LOE-T2 has been completed.

#	ID	Name	Buffers	Prj duration
1	LOE-T1	T0		
2	LOE-T3	Coordination LOE	0% n/a	[20 days]
3	LOE-T2	T1		
4	LOE-T4	T2	0% 0%	[4 days]
5	LOE-T18	[FB] T2	n/a 0%	
6	LOE-T5	T3	0% n/a	[10 days]
7	LOE-T6	Integration	0% n/a	[10 days]
8	LOE-T7	Integration Completed	0% n/a	[0 days]
9	LOE-T11	Installation	0% n/a	[10 days]
10	LOE-T12	Handover	0% n/a	[10 days]
11	LOE-T17	Project buffer	0% n/a	

Remaining workload is 40 hours

Resource/Skill	Estimated time	Units	Status	Estimated time to complete
S: Project Manager [*Sven Cramer:40h]	level of effort - 48h	25%	Started	level of effort - 40h



# My activities – LOE Task Management

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My activities Messages (0) Project portfolio Active tasks Calendar Configure Reporting

Show design packages enter your search text Cards >>

ID	Description	Task type	TM	Priority	RTS	Resources
LOE-T2	<a href="#">e, T1</a> Project with LOE and Auto-expand	Normal	AC		Yes	Designer [4 days, not started]
LOE-T3	<b>Coordination LOE</b> Project with LOE and Auto-expand	Level of effort	AC		Yes	Project Manager [24 days, not started]

Task details

ID LOE-T3  
Description Coordination LOE  
Project Project with LOE and Auto-expand  
Project manager A-dato Consulting, A-dato  
Scheduled dates Mon 2 Oct 9:00 - Thu 2 Nov 17:00  
Milestone constraint n/a  
Last update Sun 24 Sep 12:22 by A-dato Consulting  
Task manager A-dato Consulting, A-dato

Resourcing Notes (0) Custom fields Working hours Workpackage

Project Manager

Your role Task manager  
Skill Project Manager  
Resource(s) \*Sven Cramer

Status Not started  
Ettc Auto expand - 48h remaining  
This task is set to 'Auto expand'. The # hours to complete this task are calculated from the duration  
Expected completion Thu 2 Nov 17:00 at 25%  
Scheduled duration Level of effort - 48h

LOE Task need to be set to "Started" when they are "RTS", like any other task.

Ettc will be calculated automatically until 0!

# My activities

Set LOE Task to "Completed" once Etc = 0

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The screenshot shows a software interface with a navigation bar at the top containing 'My activities', 'Messages (0)', 'Project portfolio', 'Active tasks', 'Calendar', 'Configure', and 'Reporting'. Below this is a search bar with the text 'enter your search text' and a 'Cards >>' button. A table lists tasks with columns for ID, Description, Task type, TM, Priority, RTS, and Resources. One task is highlighted: ID LOE-T3, Description 'Coordination LOE Project with LOE and Auto-expand', Task type 'Level of effort', TM 'AC', Priority (green circle), RTS 'Started', and Resources 'Project Manager [, started]'. To the right is a 'Task details' panel for ID LOE-T3, showing description, project name, manager, dates, and last update. Below this is a 'Project Manager' section with fields for 'Your role' (Task manager), 'Skill' (Project Manager), and 'Resource(s)' (No resource assigned). A green dashed box highlights the 'Status' (Started) and 'Etc' (Auto expand - 0h remaining) fields. A green text box at the bottom center contains the text: 'LOE Task need to be set to completed, once the Etc is counted down to 0.'

ID	Description	Task type	TM	Priority	RTS	Resources
LOE-T3	Coordination LOE Project with LOE and Auto-expand	Level of effort	AC		Started	Project Manager [, started]

**Task details**

ID LOE-T3  
Description Coordination LOE  
Project Project with LOE and Auto-expand  
Project manager A-dato Consulting, A-dato  
Scheduled dates Fri 27 Oct 9:00 - Fri 27 Oct 9:00  
Milestone constraint n/a  
Last update Sun 24 Sep 12:36 by A-dato Consulting  
Task manager A-dato Consulting, A-dato

Resourcing Notes (0) Custom fields Working hours Workpackage

**Project Manager**

Your role Task manager  
Skill Project Manager  
Resource(s) No resource assigned  
Status Started  
Etc Auto expand - 0h remaining  
This task is set to 'Auto expand'. The # hours to complete this task are calculated from the duration  
Expected completion n/a  
Scheduled duration Level of effort - 0h

LOE Task need to be set to completed, once the Etc is counted down to 0.

# Task Progress by Task Manager Report

HTML Reporting

XML reporting

Options

Edit template Refresh

Preview Save report

Schedule Filter(s)

Templates

Search...

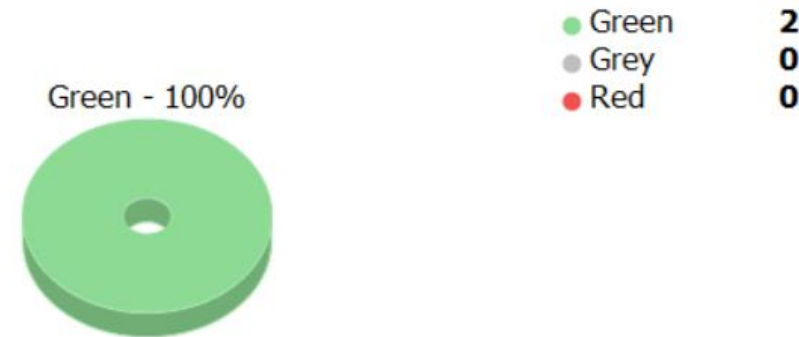
Lynx - Task progress by taskmanager

- Lynx
- Notifications

## Tasks last progress

Created by: A-dato Consulting, A-dato  
Date: 25-Sep-17 12:44:41

Legend	Edit
Tasks updated since 1 workday(s) ago	
Tasks updated between 1 and 2 workdays ago	
Tasks updated 2 workday(s) ago and before	



Taskmanager: A-dato Consulting, A-dato

Luid	Project	Active task	Critical	Changed by	Perc	Updated
<a href="#">1709A-T1</a>	WIP Project A	Task 1	Yes	A-dato Consulting	100%	30-09-2017
<a href="#">LOE-T11</a>	Project with LOE and Auto-expand	Installation	Yes	A-dato Consulting		30-09-2017
<a href="#">LOE-T3</a>	Project with LOE and Auto-expand	Coordination LOE	No	A-dato Consulting	LoE	ettc: 0 h

Once the LOE Task has an Etc of 0 hours, the Task need to be set to be completed.

LOE Task appear at the bottom of the Task Progress Report.