

A guide to interlinking projects

There are a number of steps required to produce a fully integrated schedule.

- 1.) Identify driving interfaces & accountability between schedules
- 2.) Agree & document driving interfaces between accountable parties.
- 3.) Agree methodology & accountability of linking programmes
- 4.) Agree methodology, accountability & date(s) of scheduling programmes
- 5.) Physically link programmes
- 6.) Schedule

Identifying driving interfaces of schedules

Within a programme you may have many “hard” and “soft” interfaces.

Hard interfaces are where a deliverable is handed to another party to commence an action. This is similar to the approval of a key design or a physical such as foundations or a new train for modification. Specifically it's where accountability for delivery has left the originator.

Soft interfaces are where you provide information for review, but the accountability rests with the originator.

Deciding at what level you track or group hard interfaces can be critical to the complexity of your programme. Grouping deliverables in stages can lead to a much higher level summary programme giving flexibility when some deliverables are inevitably delayed as the group can be split down and partial handovers achieved. Where programmes enter critical phases, each individual interface may be split out to maximise visibility of float paths.

Agree & document driving interfaces between accountable parties

For each individual interface, success criteria, accountability and to whom the accountability is passed must be documented and agreed by all parties. The documentation must be revision based, dated and stored in an agreed location both parties are able to access. This allows document control to modify these through agreed change control and both parties to work to the most recent version. Where interfaces are grouped, it is advisable to break them down to individual level and note the grouping to facilitate easy breakdown in the case of unmitigatable slippage & subsequent change control.

Summary documents such as interface registers are excellent tools to track slippage but must be recognised that only the centrally stored individual agreements for each interface are the final word.

Agree methodology & accountability of linking programmes

The method of linking two or more programmes should be standardised taking into account both internal and external interfaces. The suggested strategy incorporates a three point process, ie “produced” “accepted” and “utilised”.

A three point process allows a party to produce a document for review, accepted/agreed by both parties and a third point shows the incoming driving point in the receiving programme. Whilst both

the produced and accepted or accepted and utilised can be stored in either the originator or receiver programme, it is recommended a third, purely interface programme be used. This enables the originator programme or receiver programme to be scheduled without concern that previous period's information will be affected. This is useful when looking to get project/programme manager approval based on best known information prior to integration.

It is common for the planner receiving a hard interface to be responsible for agreement milestone and subsequent utilisation milestone. In regards to linking the produced to accepted or accepted to utilised, it should be documented in the controls manual who is responsible and accountable for maintaining the link. Generally speaking, the planner in receipt of an interface is most likely the one with the vested interest in acceptance to start their processes.

Following integration, the programmes require further review and approval to ensure all current slips are understood or mitigated before closing out a reporting period. Any changes to interfaces should be communicated prior to integration to enable early mitigation. It is suggested the accountability of communicating slippages is the planner responsible for the production of the interface.

An offline version, such as if integration is not to happen via (in)direct links in projects during scheduling (due to lack of enterprise structure/offline working), but use of constraints to agreed interface dates may mitigate or complicate matters.

In the case of 3rd party programmes being used within schedules, ensure that a suitable level of detail, similar to the level you are planning in is being used.

Agree methodology, accountability & date(s) of scheduling programmes

Planners across the industry are generally not used to centralised scheduling of projects, however if multiple projects are jointed via inter project activity links, a responsible party, calendar and methodology has to be agreed.

In a 4 weekly cycle, it is anticipated that individual planners will need to look and assure their programme based on previous periods interface dates. Following agreement with the project manager, integration can commence. Subsequently a review of the interface dates at a project manager level should be undertaken to mitigate slippages or catch errors. Subsequent interface scheduling will bring the programme gradually into line with expected results.

Note, all data dates must be in alignment with integration scheduling otherwise unexpected delays may occur in post interface driving paths.

Physically link programmes & Schedule

Having agreed & documented interfaces between parties & the related methodology and accountability, the activities need to be linked – this should follow the earlier discussed communications strategy.

It is advisable to code any activities to enable easy reporting with emphasis on using useful interface names as activity names. Codes should differentiate between “production” “acceptance” and “utilised”. Additional codes for accountability may also be useful in reporting.

When scheduling, some tools allow the option to ignore external relationships. If a project has several “utilised” activities which are not constrained, scheduling without the external relationships will provide current “need by” dates + float. Using start on or after constraints with the officially agreed dates will give indications of how much float is being eaten (or not) by impacted relationships. The relevance of this depends on who owns the float in your programme!