

The logo features the text "Georgia Tech" in a bold, white, sans-serif font. To the right of the text is a white icon of a building with a central spire. The background of the logo is a semi-transparent olive green overlay on a photograph of a train engine's interior, showing various mechanical parts and a large circular gauge.

**Georgia
Tech**

CREATING THE NEXT

Project Financial and Schedule Baselines

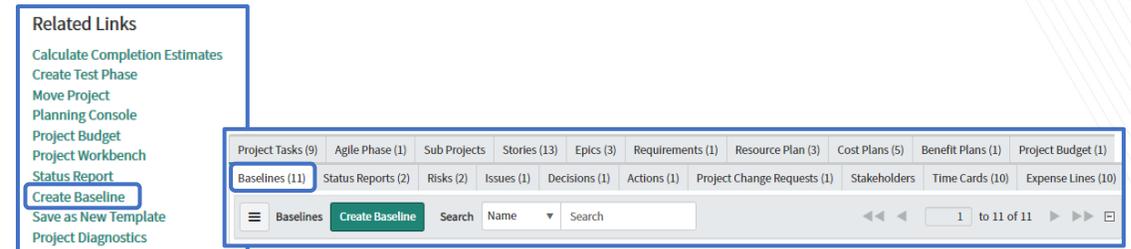
Quick Reference Guide

Project Financial and Schedule Baselines

Baselines can be captured for schedules and/or financials. A schedule baseline captures planned dates of all tasks and milestones at a given point in time. A financial baseline captures a snapshot of all cost plans, benefit plans, budget details, and project level financials at a given point in time. Project Baselines can be captured using the related link, related list, planning console or the financial tab on the Project Workspace.

Create Project Baseline using Related Link or Related List

1. Once you have opened the project, scroll to the related links section and click on **Create Baseline** or continue scrolling down to the related lists section and click on the **Baseline** tab and **Create Baseline**.
2. The Create Baseline pop-up will appear. The **Name** will be populated with the current date (it can be renamed). Enter a **Description**. **Create Schedule Baseline** and **Create Financial Baseline** are checked by default. If only a financial or schedule baseline is needed, one can be unchecked. Click **Save**.



Create Baseline

Enter a baseline name, then click on Save to create a baseline for tasks and financials.

A schedule baseline is a snapshot of each task's current planned start and end dates. A financial baseline is a snapshot of the project's current financial plans, which includes cost and benefit plans, but not actuals.

Name:

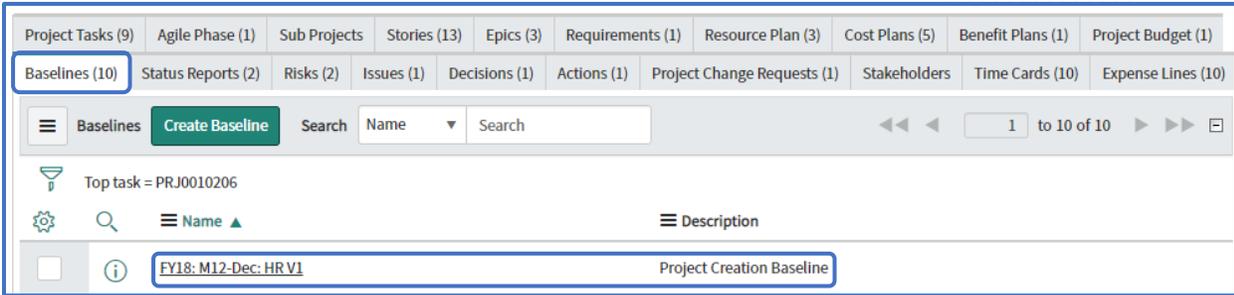
Description:

Create Schedule Baseline:

Create Financial Baseline:

Project Financial and Schedule Baselines

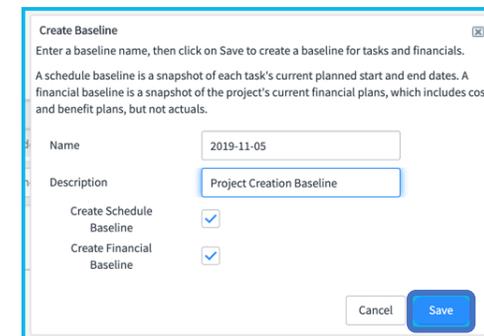
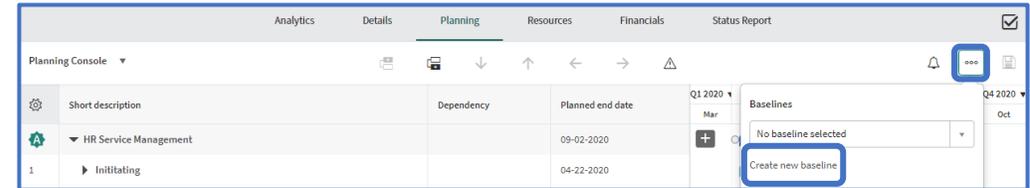
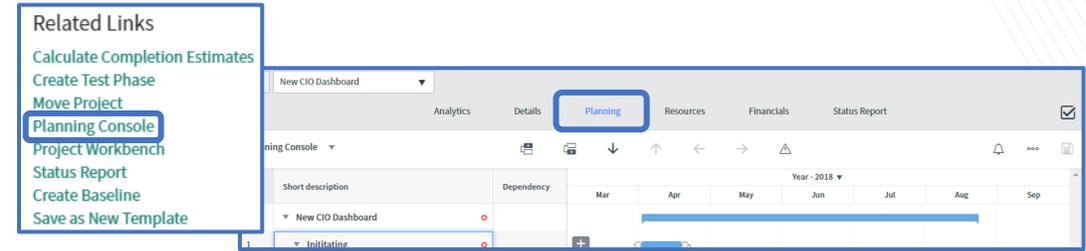
3. The baseline will now appear in the Baselines related list.



Project Financial and Schedule Baselines

Create a Baseline from the Planning Console

1. Access the Planning Console from the Project Workspace Planning tab or from the Planning Console related link.
 2. Click the More Actions icon ()
 3. Choose Create New Baseline
-
2. The Create Baseline pop-up will appear. The **Name** will be populated with the current date (it can be renamed). Enter a **Description**. **Create Schedule Baseline** and **Create Financial Baseline** are checked by default. If only a financial or schedule baseline is needed, one can be unchecked. Click **Save**.



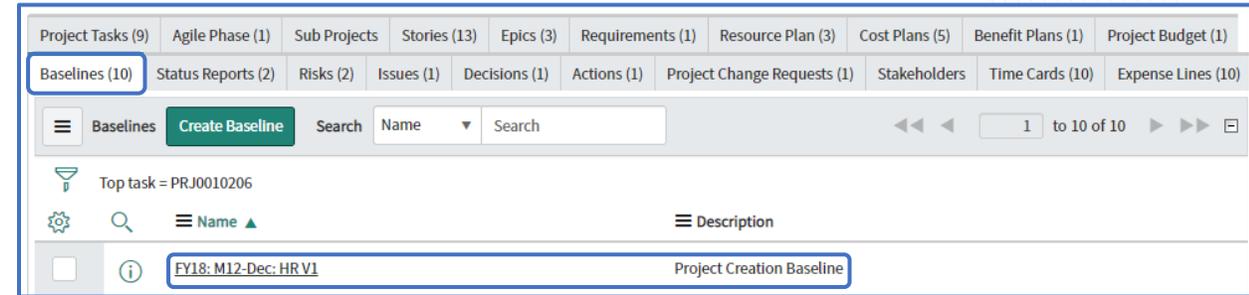
The 'Create Baseline' dialog box contains the following information:

- Name:** 2019-11-05
- Description:** Project Creation Baseline
- Create Schedule Baseline:**
- Create Financial Baseline:**

Buttons: Cancel, Save

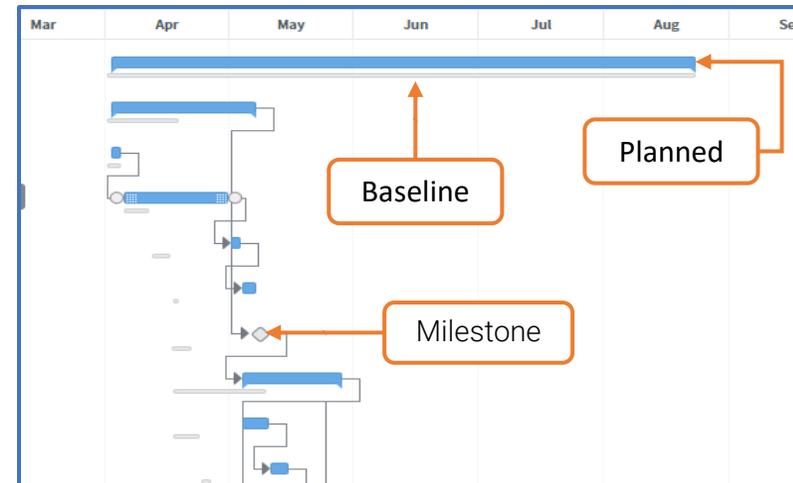
Project Financial and Schedule Baselines

5. The baseline will now appear on the baseline related list.



Viewing the Baseline on the Planning Console

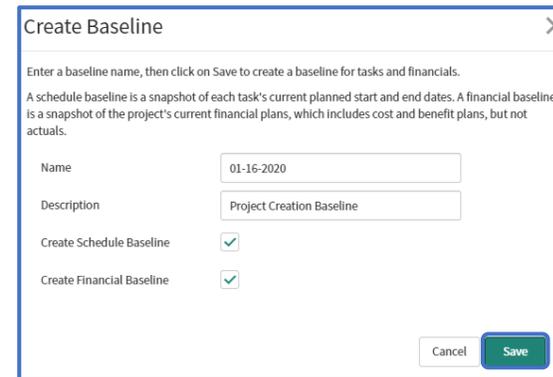
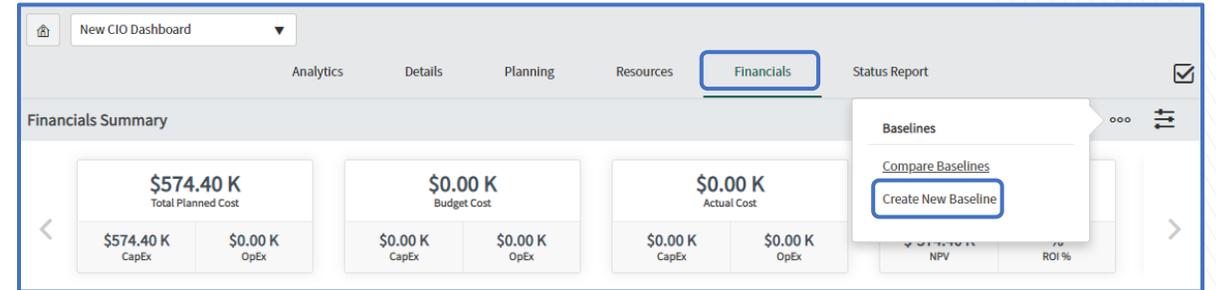
- The baseline appears as a set of gray lines under a task in the Gantt chart.
- The gray lines represent the **Baseline** dates, while the blue task bars represent the **Planned** dates.
- If the Project tasks are shifted to the right of the baselines, a Project is running behind schedule.



Project Financial and Schedule Baselines

Create a Project Baseline on the Financials Summary Tab

1. Access the **Financial Summary** tab from the **Project Workspace Financial** tab
2. Click the **More Actions** icon ()
3. Click **Create New Baseline**
4. The Create Baseline pop-up will appear. The **Name** will be populated with the current date (it can be renamed). Enter a **Description**. **Create Schedule Baseline** and **Create Financial Baseline** are checked by default. If only a financial or schedule baseline is needed, one can be unchecked. Click **Save**.
5. The baseline has been created for the project and will appear in the related list.



The 'Create Baseline' pop-up form contains the following information:

- Name:** 01-16-2020
- Description:** Project Creation Baseline
- Create Schedule Baseline:**
- Create Financial Baseline:**

Buttons: Cancel, Save

Project Financial and Schedule Baselines

Compare Baselines on the Financial Summary

1. From the **Financials** tab on Project Workspace, click the **More Action** icon (⋮)
2. Click **Compare Baselines**.
3. Use the baselines at the top of the screen to select one baseline vs. another. Click **Compare**. Click the **Baseline Legend** icon (i) to identify baselines.

