



SAS Publishing



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SAS/OR® 9.1.3 User's Guide: Project Management 2.1

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Acknowledgments

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Software

The procedures in SAS/OR software were implemented by the Operations Research and Development Department. Substantial support was given to the project by other members of the Analytical Solutions Division. Core Development Division, Display Products Division, Graphics Division, and the Host Systems Division also contributed to this product.

In the following list, the names of the developers currently supporting the procedure are listed first. Other developers previously worked on the procedure.

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The final responsibility for the SAS System lies with SAS Institute alone. We hope that you will always let us know your opinions about the SAS System and its documentation. It is through your participation that SAS software is continuously improved.

What's New in SAS/OR 9.1.3, Release 2

Overview

SAS/OR software, version 9.1.3, release 2 contains several new and enhanced features. Brief descriptions of the new features appear in the following sections. For more information, refer to the SAS/OR documentation, which is now available in the following six volumes:

- SAS/OR User's Guide: Bills of Material Processing
- SAS/OR User's Guide: Constraint Programming
- SAS/OR User's Guide: Local Search Optimization
- SAS/OR User's Guide: Mathematical Programming
- SAS/OR User's Guide: Project Management
- SAS/OR User's Guide: The QSIM Application

The online help can also be found under the corresponding classification.

The NETFLOW Procedure

The NETFLOW procedure in *SAS/OR User's Guide: Mathematical Programming* contains a new experimental feature in SAS 9.1.3 release 2, which enables you to specify and solve generalized network problems. A new option, GENNET, is available in the call to PROC NETFLOW. This option is used to explicitly indicate that the network is generalized. With the new EXCESS= option, the NETFLOW procedure is now capable of solving an even wider variety of problems. These include:

- networks with excess supply or demand
- networks containing nodes with unknown supply and demand values
- maximum flow problems
- networks with nodes having range constraints on supply and demand

The OPTLP Procedure (Experimental)

The new OPTLP procedure in *SAS/OR User's Guide: Mathematical Programming* is an experimental linear programming solver for problems that are submitted in an MPS-format SAS data set.

The MPS-format SAS data set, which corresponds closely to the commonly used MPS-format file, is newly introduced in SAS 9.1.3 release 2.

PROC OPTLP provides three solvers to solve the LP: primal simplex, dual simplex, and interior point. The simplex solvers implement a two-phase simplex method, and the interior point solver implements a primal-dual predictor-corrector algorithm.

The OPTMODEL Procedure (Experimental)

The new OPTMODEL procedure in *SAS/OR User's Guide: Mathematical Programming* provides a modeling environment tailored to building, solving, and maintaining optimization models. This makes the process of translating the symbolic formulation of an optimization model into OPTMODEL virtually transparent since the modeling language mimics the symbolic algebra of the formulation as closely as possible. OPTMODEL also streamlines and simplifies the critical process of populating optimization models with data from SAS data sets. All of this transparency produces models that are more easily inspected for completeness and correctness, more easily corrected, and more easily modified, whether through structural changes or through the substitution of new data for old.

The OPTMODEL procedure comprises the powerful OPTMODEL modeling language and state-of-the-art solvers for several classes of mathematical programming problems. In SAS 9.1.3 release 2, four experimental solvers are available to OPTMODEL:

Problem	Solver
Linear Programming	LP
Nonlinear Programming, Linearly Constrained	NLPC
Nonlinear Programming, Unconstrained	NLPU
General Nonlinear Programming	SQP

The OPTQP Procedure (Experimental)

The new OPTQP procedure in *SAS/OR User's Guide: Mathematical Programming* is an experimental quadratic programming solver for problems that are submitted in a QPS-format SAS data set.

The QPS-format SAS data set, which corresponds closely to the QPS-format file, is newly introduced in SAS 9.1.3 release 2.

The Earned Value Management Macros (Experimental)

The set of earned value management macros is a supplement to the current procedures in *SAS/OR User's Guide: Project Management* to meet your need in earned value management. Two distinct types of macros are included: one for analysis and one for reporting. The former is used to analyze schedule and cost data and to derive earned value metrics. The latter is used to graphically represent the results from the analysis.

Microsoft Project Conversion Macros (Experimental)

The SAS macros %MDBTOPM and %MP2KTOPM are used for converting MDB files saved by Microsoft Project 98 and Microsoft Project 2000 (and later), respectively. These two macros are now wrapped into the macro %MSPTOSAS in SAS 9.1.3 release 2. The %MSPTOSAS macro converts Microsoft Project 98 (and later) data. The macro generates the necessary SAS data sets, determines the values of the relevant options, and enables you to invoke an instance of the PM procedure with the converted project data. Execution of this macro requires SAS/ACCESS software.

Using This Book

Purpose

SAS/OR User's Guide: Project Management provides a complete reference for the project management procedures in SAS/OR software. This book serves as the primary documentation for the CPM, DTREE, GANTT, NETDRAW, and PM procedures, the earned value management macros, the microsoft project conversion macros, and the Projman application.

“Using This Book” describes the organization of this book and the conventions used in the text and example code. To gain full benefit from using this book, you should familiarize yourself with the information presented in this section and refer to it when needed. “Additional Documentation” at the end of this section provides references to other books that contain information on related topics.

Organization

Chapter 1 contains a brief overview of the project management procedures in SAS/OR software and provides an introduction to project management methodology and the use of the project management tools in the SAS System. The first chapter also describes the flow of data between the procedures and how the components of the SAS System fit together.

After the introductory chapter, the next chapters describe the CPM, DTREE, GANTT, NETDRAW, and PM procedures. Each procedure description is self-contained; you need to be familiar with only the basic features of the SAS System and SAS terminology to use most procedures. The statements and syntax necessary to run each procedure are presented in a uniform format throughout this book.

The following list summarizes the types of information provided for each procedure:

Overview provides a general description of what the procedure does. It outlines major capabilities of the procedure and lists all input and output data sets that are used with it.

Getting Started illustrates simple uses of the procedure using a few short examples. It provides introductory *hands-on* information for the procedure.

- Syntax** constitutes the major reference section for the syntax of the procedure. First, the statement syntax is summarized. Next, functional summary tables list all the statements and options in the procedure, classified by function. In addition, the online version includes a Dictionary of Options, which provides an alphabetical list of all options. Following these tables, the PROC statement is described, and then all other statements are described in alphabetical order. The mode-specific options (line-printer, full-screen, and graphics options) for the DTREE, GANTT, and NETDRAW procedures are described alphabetically under appropriate subheadings.
- Details** describes the features of the procedure, including algorithmic details and computational methods. It also explains how the various options interact with each other. This section describes input and output data sets in greater detail, with definitions of the output variables, and explains the format of printed output, if any.
- Examples** consists of examples designed to illustrate the use of the procedure. Each example includes a description of the problem and lists the options highlighted by the example. The example shows the data and the SAS statements needed, and includes the output produced. You can duplicate the examples by copying the statements and data and running the SAS program. The SAS Sample Library contains the code used to run the examples shown in this book; consult your SAS Software representative for specific information about the Sample Library. Cross-reference tables in each chapter list all the options and statements illustrated by the different examples in that chapter.
- References** lists references that are relevant to the chapter.

Typographical Conventions

The printed version of *SAS/OR User's Guide: Project Management* uses various type styles, as explained by the following list:

roman is the standard type style used for most text.

UPPERCASE ROMAN	is used for SAS statements, options, and other SAS language elements when they appear in the text. However, you can enter these elements in your own SAS code in lowercase, uppercase, or a mixture of the two. This style is also used for identifying arguments and values (in the Syntax specifications) that are literals (for example, to denote valid keywords for a specific option).
UPPERCASE BOLD	is used in the “Syntax” section to identify SAS keywords, such as the names of procedures, statements, and options.
bold	is used in the “Syntax” section to identify options. In the chapters for PROC PM and PROJMAN, bold is also used to identify menu items and dialog boxes.
helvetica	is used for the names of SAS variables and data sets when they appear in the text.
<i>oblique</i>	is used for user-supplied values for options (for example, INTERVAL= <i>interval</i>).
<i>italic</i>	is used for terms that are defined in the text, for emphasis, and for references to publications.
monospace	is used to show examples of SAS statements. In most cases, this book uses lowercase type for SAS code. You can enter your own SAS code in lowercase, uppercase, or a mixture of the two. This style is also used for values of character variables when they appear in the text.

Conventions for Examples

Most of the output shown in this book is produced with the following SAS System options:

```
options linesize=80 pagesize=60 nonumber nodate;
```

In addition, most of the graphics output shown in this book is produced with the following options:

Printed Version

```
goptions hpos=80 vpos=32;
```

Online Version

```
goptions hpos=80 vpos=32 ypixels=800;
```

The remaining graphics options used in this book depend on the type of output, as well as the procedure used to create the output. The general options for half-page portrait, full-page portrait, and full-page landscape output are as follows:

Half-page Portrait

```
goptions hsize=5.75 in vsize=4.0 in;
```

Full-page Portrait

```
goptions hsize=5.75 in vsize=8.0 in;
```

Full-page Landscape

```
goptions hsize=8.0 in vsize=5.75 in
border rotate=landscape;
```

Additional Graphics Options by Procedure

GANTT Procedure

The following PATTERN statements are used to create the online (color) output from PROC GANTT.

```
pattern1 c=green v=s;
pattern2 c=green v=e;
pattern3 c=red v=s;
pattern4 c=magenta v=e;
pattern5 c=magenta v=s;
pattern6 c=cyan v=s;
pattern7 c=black v=e;
pattern8 c=blue v=s;
pattern9 c=brown v=s;
```

The following PATTERN statements are used to create the black-and-white output from PROC GANTT, which appears in the printed version of the manual.

```
pattern1 v=x1 c=black;
pattern2 v=l1 c=black;
pattern3 v=s c=black;
pattern4 v=r1 c=black;
pattern5 v=x2 c=black;
pattern6 v=x4 c=black;
pattern7 v=e c=black;
pattern8 v=x3 c=black;
pattern9 v=l2 c=black;
```

NETDRAW Procedure

The following GOPTIONS and PATTERN statements are used to create the online (color) output from PROC NETDRAW.

```
goptions cback=ligr;
pattern1 v=e c=green;
pattern2 v=e c=red;
pattern3 v=e c=magenta;
pattern4 v=e c=blue;
pattern5 v=e c=cyan;
```

The following GOPTIONS and PATTERN statements are used to create the black-and-white output from PROC NETDRAW, which appears in the printed version of the manual.

```
pattern1 c=black v=e r=5;
```

DTREE Procedure

The following GOPTIONS statement is used to create the online (color) output from PROC DTREE.

```
goptions cback=ligr ctext=black ftext=swissu;
```

The following GOPTIONS statement is used to create the black-and-white output from PROC DTREE, which appears in the printed version of the manual.

```
goptions ftext=swissu;
```

Accessing the SAS/OR Sample Library

The SAS/OR sample library includes many examples that illustrate the use of SAS/OR software, including the examples used in this documentation. To access these sample programs, select **Learning to Use SAS->Sample SAS Programs** from the **SAS Help and Documentation** window, and then select **SAS/OR** from the list of available topics.

Online Help System and Updates

You can access online help information about SAS/OR software in two ways, depending on whether you are using the SAS windowing environment in the command line mode or the pull-down menu mode.

If you are using a command line, you can access the SAS/OR help menus by typing **help or** on the command line. If you are using the pull-down menus, you can select **SAS Help and Documentation->SAS Products** from the **Help** pull-down menu, and then select **SAS/OR** from the list of available topics.

Additional Documentation for SAS/OR Software

In addition to *SAS/OR User's Guide: Project Management*, you may find these other documents helpful when using SAS/OR software:

SAS/OR User's Guide: Bills of Material Processing

provides documentation for the BOM procedure and all bill-of-material post-processing SAS macros. The BOM procedure and SAS macros provide the ability to generate different reports and to perform several transactions to maintain and update bills of material.

SAS/OR User's Guide: Constraint Programming

provides documentation for the constraint programming procedure in SAS/OR software. This book serves as the primary documentation for the CLP procedure, an experimental procedure new to SAS/OR software.

SAS/OR User's Guide: Local Search Optimization

provides documentation for the local search optimization procedure in SAS/OR software. This book serves as the primary documentation for the GA procedure, an experimental procedure that uses genetic algorithms to solve optimization problems.

SAS/OR User's Guide: Mathematical Programming

provides documentation for the mathematical programming procedures in SAS/OR software. This book serves as the primary documentation for optimization procedures, such as the ASSIGN, LP, INTPOINT, NETFLOW, NLP, and TRANS procedures, and the new procedure, QP, for solving quadratic programming problems.

SAS/OR User's Guide: The QSIM Application

provides documentation for the QSIM Application, which is used to build and analyze models of queueing systems using discrete event simulation. This book shows you how to build models using the simple point-and-click graphical user interface; how to run the models; and how to collect and analyze the sample data to give you insight into the behavior of the system.

SAS/OR Software: Project Management Examples, Version 6

contains a series of examples that illustrate how to use SAS/OR software to manage projects. Each chapter contains a complete project management scenario and describes how to use PROC GANTT, PROC CPM, and PROC NETDRAW, in addition to other reporting and graphing procedures in the SAS System, to perform the necessary project management tasks.

SAS/IRP User's Guide: Inventory Replenishment Planning

provides documentation for SAS/IRP software. This book serves as the primary documentation for the IRP procedure for determining replenishment policies, as well as the %IRPSIM SAS programming macro for simulating replenishment policies.

Chapter 1

Introduction to Project Management

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Chapter 1

Introduction to Project Management

Overview

This chapter briefly describes how you can use SAS/OR software for managing your projects. This chapter is not meant to define all the concepts of project management; several textbooks on project management explain the basic steps involved in defining, planning, and managing projects (for example, [Moder, Phillips, and Davis 1983](#)). Briefly, a *project* is defined as any task comprising a set of smaller tasks that need to be performed, either sequentially or in parallel. Projects can be small and last only a few minutes (for instance, running a set of small computer programs), or they can be mammoth and run for several years (for example, the construction of the Channel Tunnel).

SAS/OR software has four procedures that can be used for planning, controlling, and monitoring projects: the [CPM](#) and [PM](#) procedures for scheduling project activities subject to precedence, time, and resource constraints; the [GANTT](#) procedure for displaying the computed schedule; and the [NETDRAW](#) procedure for displaying the activity network. These procedures integrate with the SAS System so that you can easily develop a customized project management system. [The Projman application](#), a user-friendly graphical user interface included as part of SAS/OR software, is one such system.

This chapter gives a brief introduction to the CPM, GANTT, NETDRAW, and PM procedures and shows how you can use the SAS System for project management.

In addition to these four procedures and the Projman application, which are the major tools for the *traditional* functions associated with project management, SAS/OR software also contains a procedure for decision analysis, the [DTREE](#) procedure. *Decision analysis* is a tool that attempts to provide an analytic basis for management decisions under uncertainty. It can be used effectively as an integral part of project management methods. A brief introduction to PROC DTREE is provided in the “[Decision Analysis](#)” section on page 10.

Data Flow

This section provides an overview of how project information is stored in the SAS System in data sets and how these data sets are used by the CPM, GANTT, NETDRAW, and PM procedures. Maintaining the project information in SAS data sets enables you to merge project information easily from several sources, summarize information, subset project data, and perform a wide variety of other operations using any of the many procedures in SAS software. Each of the SAS/OR procedures also defines a SAS macro variable that contains a character string indicating whether

or not the procedure terminated successfully. This information is useful when the procedure is one of the steps in a larger program.

The CPM Procedure

PROC CPM does the project scheduling and forms the core of the project management functionality in SAS/OR software. It uses activity precedence, time, and resource constraints, and holiday and calendar information to determine a feasible schedule for the project. The precedence constraints between the activities are described using a network representation, either in Activity-On-Arc (AOA) or Activity-On-Node (AON) notation, and input to PROC CPM in an Activity data set. The two different representations are described in Chapter 2, “The CPM Procedure.” The Activity data set can also specify time constraints on the activities and resource requirement information. The Activity data set is required. Resource availability information can be specified using another data set, referred to here as the Resource data set. Holiday, workday, and other calendar information is contained in the Holiday, Workday, and Calendar data sets; each of these data sets is described in detail in Chapter 2, “The CPM Procedure.” The schedule calculated by PROC CPM using all the input information and any special scheduling options is saved in an output data set, referred to as the Schedule data set. For projects that use resources, individual resource schedules for each activity can be saved in a Resource Schedule output data set. Resource usage information can also be saved in another output data set, referred to as the Usage data set. Figure 1.1 illustrates all the input and output data sets that are possible with PROC CPM. In the same figure, `_ORCPM_` is the SAS macro variable defined by PROC CPM.

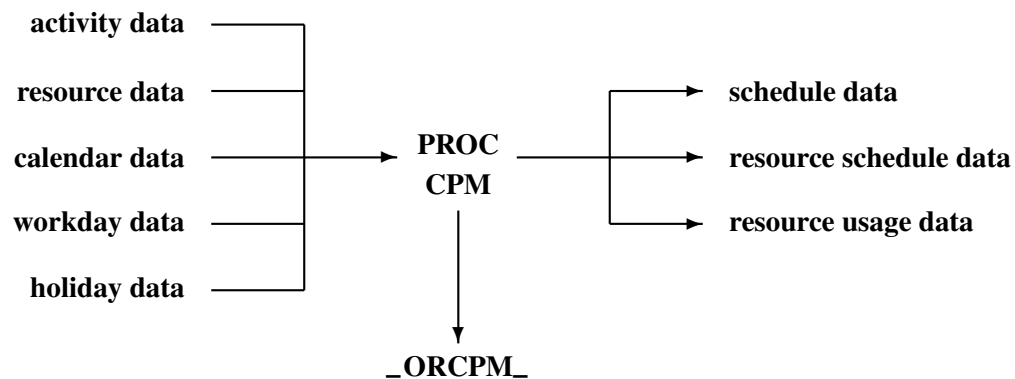


Figure 1.1. Input and Output Data Flow in PROC CPM

The three output data sets produced by PROC CPM contain all the information about the schedule and the resource usage; these data sets can be used as input to either PROC GANTT or PROC NETDRAW or to any of the several reporting, charting, or plotting procedures in the SAS System.

The Schedule data set can also contain additional project information such as project ID, department and phase information, accounting categories, and so on, in the form of ID variables passed to it from the Activity input data set with the ID statement.

These variables can be used to produce customized reports by reordering, subsetting, summarizing, or condensing the information in the Schedule data set in various ways.

The GANTT Procedure

PROC GANTT draws, in line-printer, high-resolution graphics, or full-screen mode, a bar chart of the schedules computed by PROC CPM. Such a bar chart is referred to as a Gantt chart in project management terminology. In addition to the Schedule data set, PROC GANTT can also use the Calendar, Workday, and Holiday data sets (that were used by PROC CPM when scheduling the activities in the project) to mark holidays and weekends and other nonwork periods appropriately on the Gantt chart. You can indicate target dates, deadlines, and other important dates on a Gantt chart by adding CHART variables to the Schedule data set. Furthermore, the GANTT procedure can indicate milestones on the chart by using a DURATION variable in the Schedule data set.

Precedence information can be used by PROC GANTT in either Activity-on-Node or Activity-on-Arc format to produce a Logic bar chart that shows the precedence relationships between the activities. The precedence information, required for drawing the network logic, can be conveyed to PROC GANTT using the Activity data set or a Logic data set, as described in [Chapter 6, “The GANTT Procedure.”](#)

The Gantt procedure also supports an [automatic text annotation](#) facility, using the Label data set, which is designed specifically for labeling Gantt charts independently of the SAS/GRAPH Annotate facility. The specifications in this data set enable you to print label strings with a minimum of effort and data entry while providing the capability for more complex chart labeling situations.

The Gantt procedure is Web-enabled. The HTML= option enables you to specify a variable in the Schedule data set that defines a URL for each activity. If you route the Gantt chart to an HTML file using the Output Delivery System, then you can click on a schedule bar and browse text or other descriptive information about the associated activity. You also use this information to create custom HTML files with drill-down graphs. PROC GANTT also produces an [Imagemap](#) data set that contains the outline coordinates for the schedule bars used in the Gantt chart that can be used to generate HTML MAP tags.

As with PROC CPM, PROC GANTT also defines a macro variable named _ORGANTT that has a character string indicating if the procedure terminated successfully. [Figure 1.2](#) illustrates the flow of data in and out of PROC GANTT.

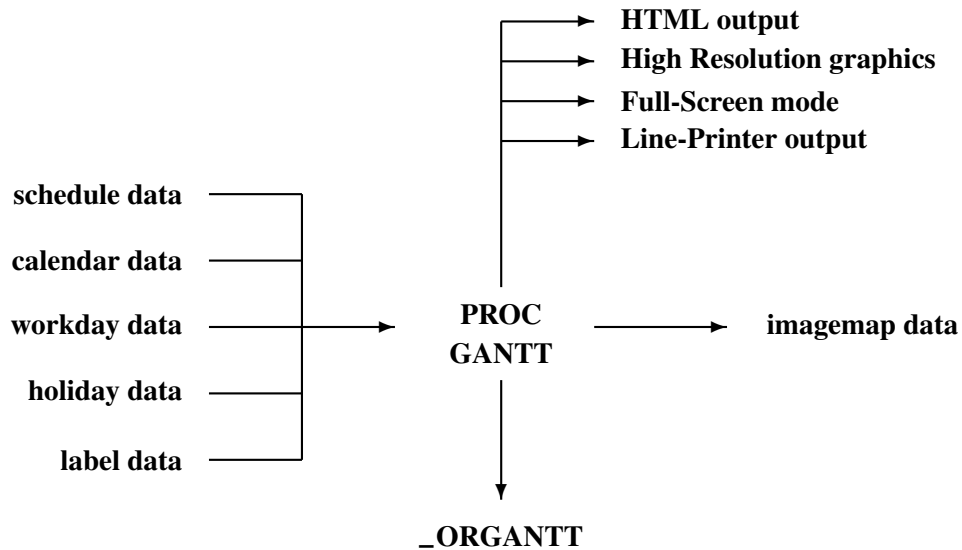


Figure 1.2. Input and Output Data Flow in PROC GANTT

The NETDRAW Procedure

PROC NETDRAW draws project networks. The procedure automatically places the nodes in the network and draws the arcs connecting them, using the (activity, successor) relationship as specified by the Network data set described in [Chapter 7, “The NETDRAW Procedure.”](#) The Network data set, used as input to PROC NETDRAW, can be an Activity data set, a Schedule data set, or a Layout data set, as described in [Chapter 7](#). If a Schedule data set, output by PROC CPM, is used as the Network data set, the network diagram also contains all the schedule times calculated by PROC CPM. The procedure can draw the diagram in line-printer mode as well as in high-resolution graphics mode. Further, you can invoke the procedure in full-screen mode, which enables you to scroll around the network to view different parts of it; in this mode, you can also modify the layout of the network by moving the nodes of the network.

By default, PROC NETDRAW uses the topological ordering of the activity network to determine the X coordinates of the nodes. In a time-based network diagram, the nodes can be ordered according to any SAS date, time, or datetime variable in the Network data set. In fact, PROC NETDRAW enables you to align the nodes according to any numeric variable in this data set, not just the start and finish times.

You can produce a zoned network diagram by identifying a ZONE variable in the input data set, which divides the network into horizontal bands or zones. This is useful in grouping the activities of the project according to some appropriate classification. The NETDRAW procedure also draws tree diagrams. This feature can be used to draw work breakdown structures or other organizational diagrams (see [Example 1.2](#)).

PROC NETDRAW produces an output data set (Layout data set), which contains the positions of the nodes and the arcs connecting them. This output data set can also be used as an input data set to PROC NETDRAW; this feature is useful when the same project network is drawn several times during the course of a project. You

may want to see the updated information drawn on the network every week; you can save computer resources by using the same node placement and arc routing, without having the procedure recompute it every time. PROC NETDRAW defines the macro variable `_ORNETDR`, which contains a character string indicating if the procedure terminated successfully.

The NETDRAW procedure is also Web-enabled (like PROC GANTT), and it supports the `HTML=` and `IMAGEMAP=` options.

Figure 1.3 illustrates the flow of data in and out of PROC NETDRAW.

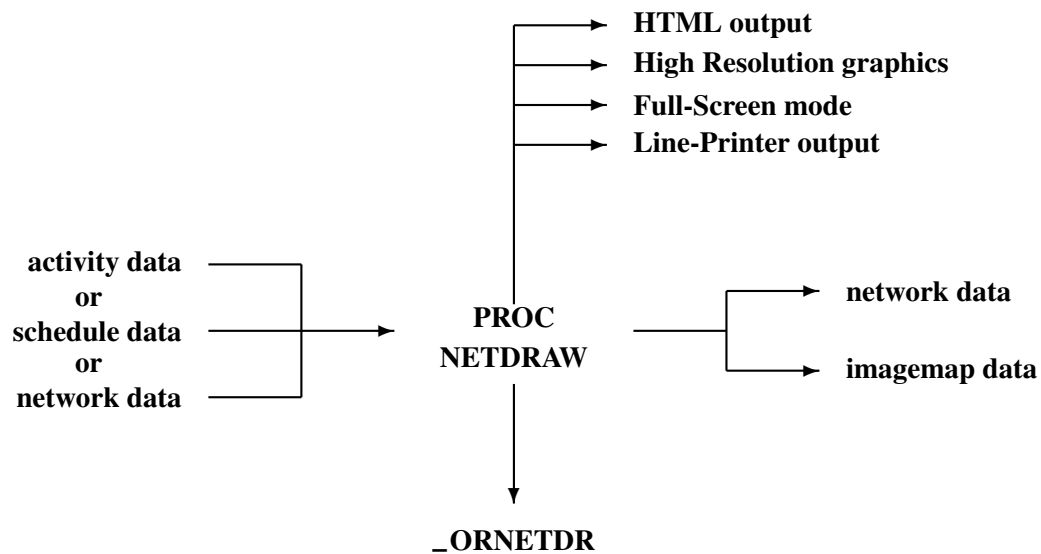


Figure 1.3. Input and Output Data Flow in PROC NETDRAW

The PM Procedure

PROC PM is an interactive procedure that can be used for planning, controlling, and monitoring a project. The syntax and the scheduling features of PROC PM are virtually the same as those of PROC CPM; there are a few differences, which are described in Chapter 3, “The PM Procedure.” As far as the flow of data is concerned (see Figure 1.4), the PM procedure supports an additional data set that can be used to save and restore preferences that control the project view. The scheduling engine used by the PM procedure is the same as the one used by PROC CPM; the same macro variable, `_ORCPM_`, is used to indicate if the schedule was computed successfully.

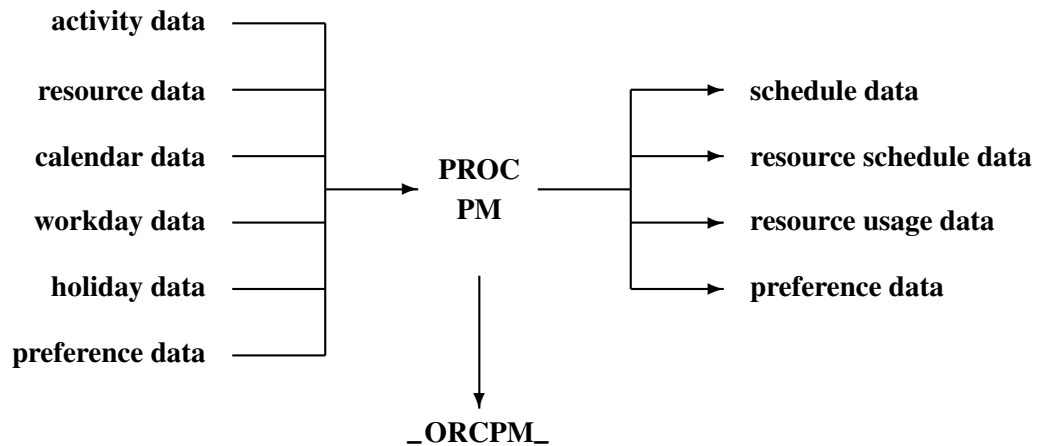


Figure 1.4. Input and Output Data Flow in PROC PM

Communication between Procedures

Figure 1.1, Figure 1.2, Figure 1.3, and Figure 1.4 illustrate the data flow going in and out of each of the four procedures: CPM, GANTT, NETDRAW, and PM, respectively. The data sets described in the previous sections store project information and can be used to communicate project data between the procedures in the SAS System. Figure 1.5 shows a typical sequence of steps in a project management system built around these procedures.

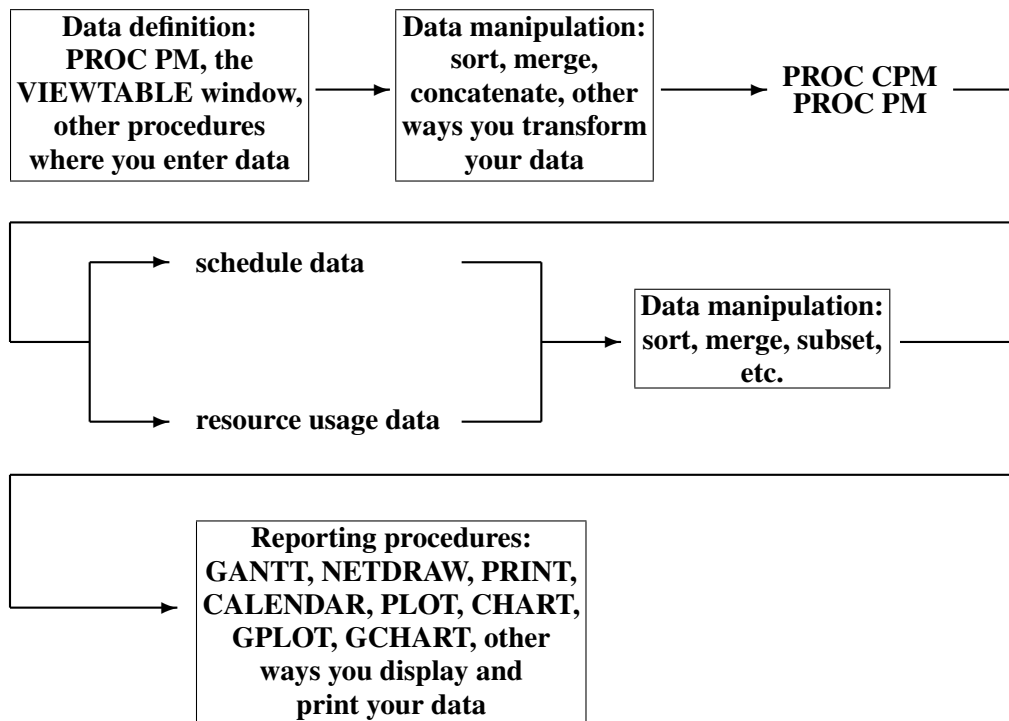


Figure 1.5. Using the SAS System for Project Management

Of course, this is only one possible scenario of the use of these procedures. In addition, you may want to use PROC NETDRAW to check the logic of the network diagram before scheduling the project using PROC CPM. Further, the data flow shown in Figure 1.5 may represent only the first iteration in a continuous scheme for monitoring the progress of a project. As the project progresses, you may update the data sets, including actual start and finish times for some of the activities, invoke PROC CPM again, produce updated Gantt charts and network diagrams, and thus continue monitoring the project.

For example, a project management system designed for scheduling and tracking a major outage at a power plant may include the steps illustrated in Figure 1.6. In the sequences of steps illustrated in both these figures, you can use PROC PM to update most of the activity information using the procedure's graphical user interface.

Thus, SAS/OR software provides four different procedures designed for performing many of the traditional project management tasks; these procedures can be combined in a variety of ways to build a customized comprehensive project management system. The "Examples" section beginning on page 11 illustrates several applications of the procedures in typical project management situations.

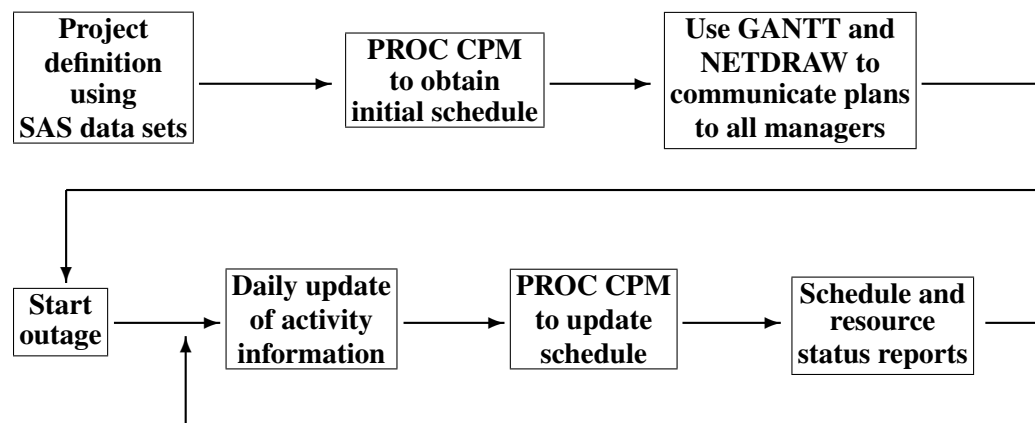


Figure 1.6. Scheduling a Power Plant Outage

Decision Support Systems

In addition to the CPM, GANTT, NETDRAW, and PM procedures, which are the major tools for the traditional functions associated with project management, SAS/OR software has several procedures that can be used to create a many-faceted Decision Support System. Traditional CPM/PERT techniques form only one part of effective project management and may be considered as a specialized application of Decision Support Systems (Williams and Boyd 1990). SAS/OR software contains several mathematical programming procedures that can be used to design effective systems for solving inventory control, transportation, network flow, transshipment, product-mix, cutting stock problems, and so on. These procedures are discussed in detail in the *SAS/OR User's Guide: Mathematical Programming*.

Decision analysis is another important tool that is receiving recognition as a component of project management. The next section briefly describes PROC DTREE and the role it can play in making important decisions in project management.

Decision Analysis

There are several stages in the course of a project when critical decisions are to be made regarding the future path that is to be followed. In fact, the most crucial decision might be to decide at the beginning whether to embark on the project or not. Other important decisions that could benefit from using decision analysis tools may be sub-contract awarding, subproject termination in a research and development (R&D) environment, what-if analysis, and so on. Decision analysis techniques can be used effectively in such situations to help make decisions under uncertainty.

The DTREE Procedure

PROC DTREE interprets a decision problem represented in SAS data sets, finds the optimal decisions, and plots on a line printer or a graphics device the decision tree showing the optimal decisions. A decision tree contains two types of nodes: decision nodes and chance nodes. A decision node represents a stage in the problem where a decision is to be made that could lead you along different paths through the tree. A chance node represents a stage in the problem where some uncertain factors result in one of several possible outcomes, once again leading you to different branches of the tree, with associated probabilities.

The structure of a decision model is given in the STAGEIN= data set. This data set, described in detail in [Chapter 5, “The DTREE Procedure,”](#) specifies the name, type, and attributes of all outcomes for each stage in your model. This is the only data set that is required to produce a diagrammatic representation of your decision problem. To evaluate and analyze your decision model, you need to specify the PROBIN= and PAYOFFS= data sets. The PROBIN= data set specifies the conditional probabilities for every event in your model. The PAYOFFS= data set specifies the value of each possible scenario (sequence of outcomes). The objective is to use the information summarized in these data sets to determine the optimal decision based on some measure of performance. One common objective is to maximize the expected value of the return. [Figure 1.7](#) illustrates the data flow for PROC DTREE.

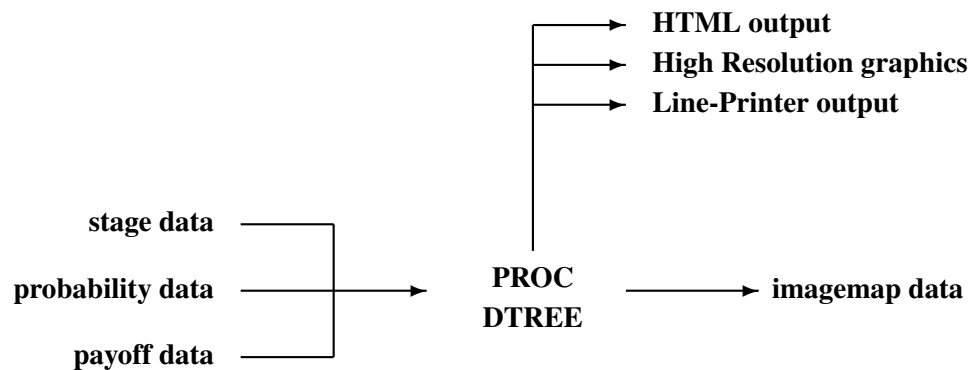


Figure 1.7. Input and Output Data Flow in PROC DTREE

You can use PROC DTREE to display, evaluate, and summarize your decision problem. The procedure can be used to plot the decision tree in line-printer or graphics mode. The optimal decisions are highlighted on the output. Further, a summary table can be displayed listing all paths through the decision tree along with the cumulative reward and the evaluating values of all alternatives for that path. The summary table indicates the optimal evaluating value for each path with an asterisk. The procedure can also perform sensitivity analysis and what-if analysis. A simple decision problem is described in [Example 1.9](#).

Examples

In this section, a few simple examples illustrate some of the basic data flow concepts described in this chapter. More detailed examples of each procedure are provided in the corresponding chapters and can also be found in *SAS/OR Software: Project Management Examples*.

Example 1.1. Project Definition

Suppose you want to prepare and conduct a market survey (Moder, Phillips, and Davis 1983) to determine the desirability of launching a new product. As a first step, you need to identify the steps involved. Make a list of the tasks that need to be performed and obtain a reasonable estimate of the length of time needed to perform each task. Further, you need to specify the order in which these tasks can be done. The following DATA step creates a SAS data set, `survey`, representing the project. This Activity data set contains a representation of the Survey project in Activity-On-Node format; a brief discussion of the two types of representations is given in [Chapter 2, “The CPM Procedure.”](#) The data set contains a variable `activity` listing the basic activities (tasks) involved, a variable `duration` specifying the length of time in days needed to perform the tasks, and, for each task, the variables `succ1–succ3`, which indicate the immediate successors. An `ID` variable is also included to provide a more informative description of each task. Thus, the activity ‘Plan Survey’ takes four days. Once the planning is done, the tasks ‘Hire Personnel’ and ‘Design Questionnaire’ can begin. The Activity data set also contains a variable named `phase` associating each activity with a particular phase of the project.

```

data survey;
  format id $20. activity $8. succ1-succ3 $8. phase $9. ;
  input id & activity & duration succ1 & succ2 & succ3 & phase $ ;
  label phase = 'Project Phase'
         id    = 'Description';
  datalines;
Plan Survey          plan sur    4 hire per  design q  .          Plan
Hire Personnel      hire per    5 trn per   .          Prepare
Design Questionnaire design q    3 trn per   select h  print q  Plan
Train Personnel     trn per     3 cond sur  .          Prepare
Select Households  select h    3 cond sur  .          Prepare
Print Questionnaire print q     4 cond sur  .          Prepare
Conduct Survey     cond sur   10 analyze  .          Implement
Analyze Results    analyze     6 .          Implement
;

```

The data set `survey` can be input to PROC CPM, which calculates how long the project will take given the current estimates of the durations. As a first step, you may want to graph the project network using PROC NETDRAW. In the initial stages of defining the tasks in a project, it is useful to see how the tasks relate to each other and perhaps modify some of the relationships. The following program invokes PROC NETDRAW; the `ZONE=` option is used to create a zoned network diagram with the activities grouped according to the phase of the project to which they correspond. The network diagram is shown in [Output 1.1.1](#).

```

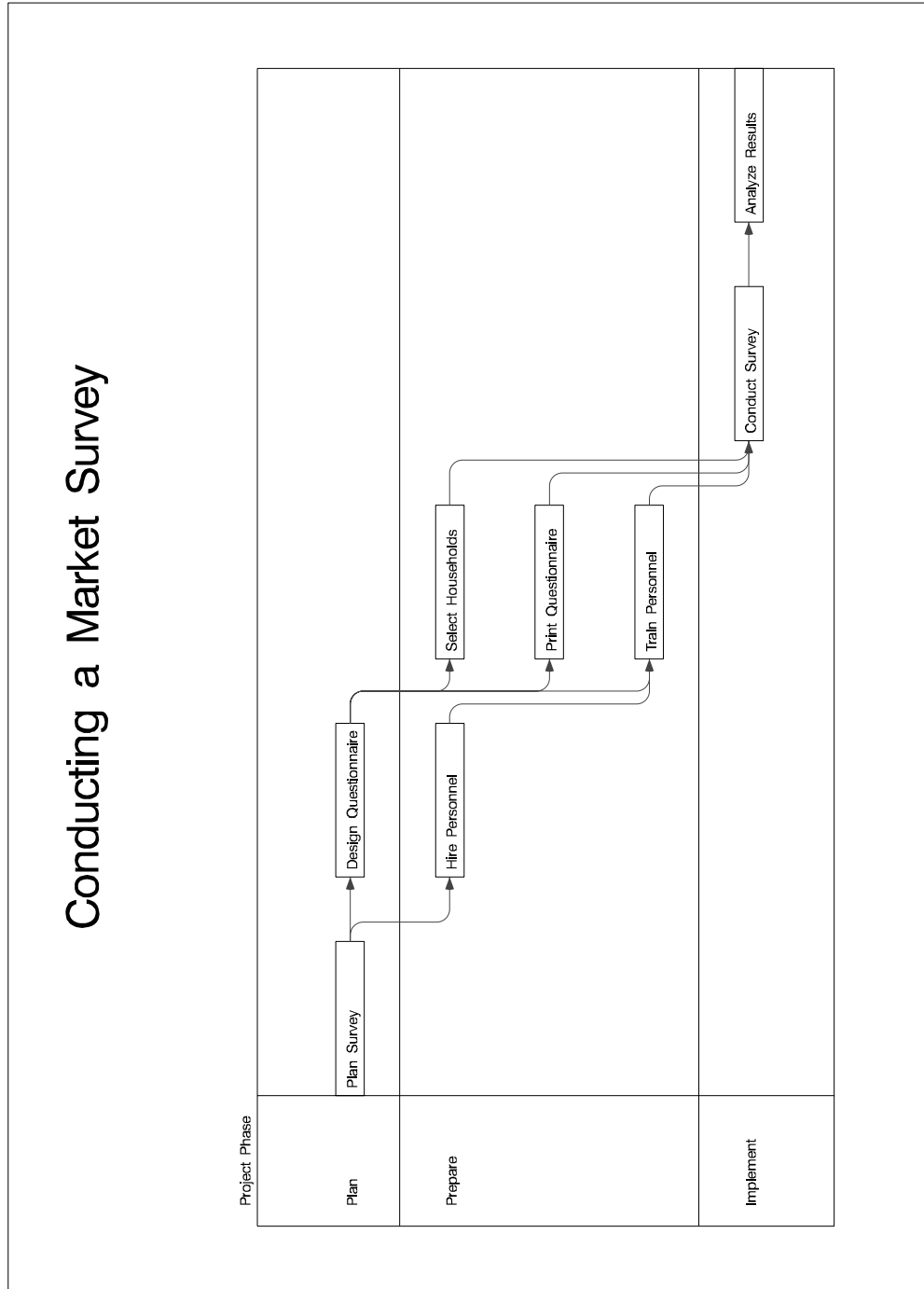
title ' ';
title2 h=3 c=black f=swiss 'Conducting a Market Survey';

goptions hpos=100 vpos=65 border;

proc netdraw data=survey graphics;
  actnet/act=activity font=swiss
  succ=(succ1-succ3)
  separatearcs
  xbetween=3
  id=(id)
  nodefid
  nolabel
  zone=phase
  zonepat
  frame;
run;

```

Output 1.1.1. Network Diagram of SURVEY Project



Example 1.2. Work Breakdown Structure

A tree diagram is a useful method of visualizing the work breakdown structure (WBS) of a project. For the survey project, the activities are divided into three phases. In this example, the NETDRAW procedure is used to represent the work breakdown structure of the project. The following program saves the data in a Network data set that is input to PROC NETDRAW. The TREE option is used to draw the WBS structure in the form of a tree (Output 1.2.1).

```

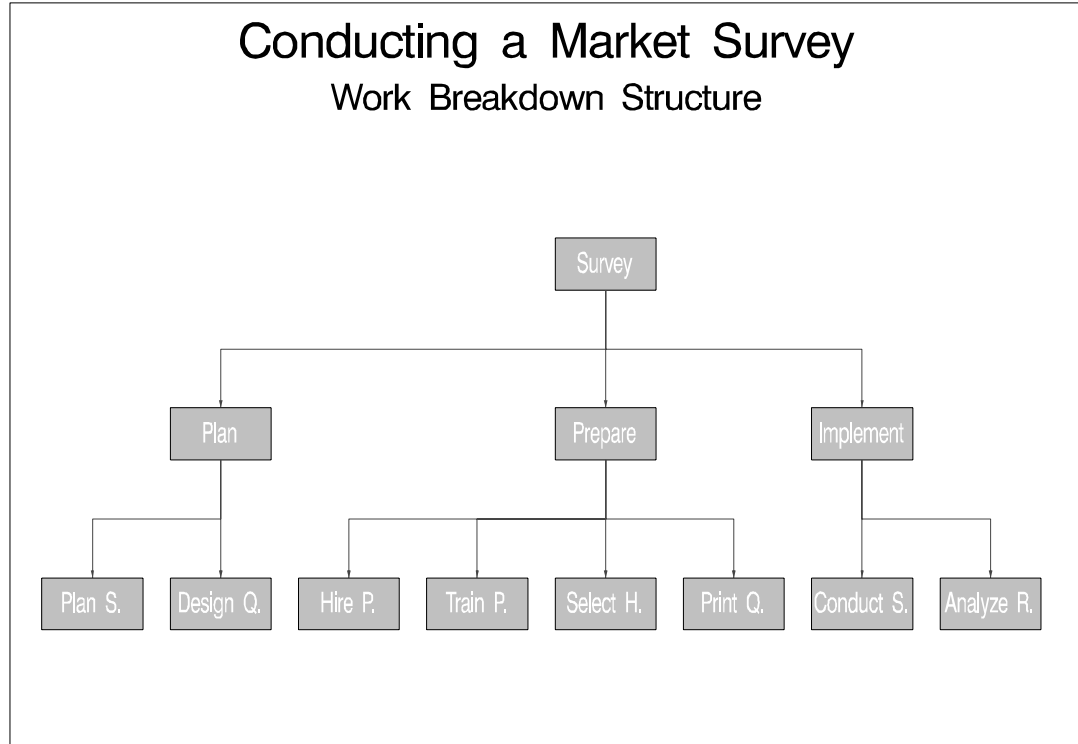
data wbs;
  format parent $10. child $10. ;
  input parent & child & style;
  datalines;
Survey      Plan          1
Survey      Prepare       1
Survey      Implement      1
Plan        Plan S.       2
Plan        Design Q.     2
Prepare     Hire P.       3
Prepare     Train P.      3
Prepare     Select H.     3
Prepare     Print Q.      3
Implement   Conduct S.   4
Implement   Analyze R.   4
Plan S.     .             2
Design Q.   .             2
Hire P.     .             3
Train P.    .             3
Select H.   .             3
Print Q.    .             3
Conduct S.  .             4
Analyze R.  .             4
;

goptions vsize=5.75 in hsize=4.0 in border;

title a=90 h=1 f=swiss 'Conducting a Market Survey';
title2 a=90 h=.8 f=swiss 'Work Breakdown Structure';

proc netdraw data=wbs graphics;
  actnet/act=parent succ=child tree
  rotate rotatetext coutline=black
  ctext=white font=swiss rectilinear
  htext=2 compress
  xbetween=15 ybetween=3 pattern=style
  centerid;
run;

```

Output 1.2.1. Work Breakdown Structure of SURVEY Project**Example 1.3. Project Scheduling and Reporting**

Having defined the project and ensured that all the relationships have been modeled correctly, you can schedule the activities in the project by invoking PROC CPM. Suppose the activities can occur only on weekdays, and there is a holiday on July 4, 2003. Holiday information is passed to PROC CPM using the Holiday data set `holidata`. The following statements schedule the project to start on July 1, 2003. The early and late start schedules and additional project information are saved in the output data set `survschd`. The output data set produced by PROC CPM can then be used to generate a variety of reports. In this example, the data set is first sorted by the variable `E_START` and then displayed using the PRINT procedure (see [Output 1.3.1](#)).

```

data holidata;
  format hol date7.;
  hol = '4jul03'd;
run;

proc cpm data=survey date='1jul03'd out=survschd
  interval=weekday holidata=holidata;
  activity activity;
  successor succ1-succ3;
  duration duration;
  id id phase;
  holiday hol;

```

```

run;

proc sort;
  by e_start;
run;

proc print;
run;

```

Output 1.3.1. Project Schedule: Listing

Conducting a Market Survey Early and Late Start Schedule						
Obs	activity	succ1	succ2	succ3	duration	id
1	plan sur	hire per	design q		4	Plan Survey
2	hire per	trn per			5	Hire Personnel
3	design q	trn per	select h	print q	3	Design Questionnaire
4	select h	cond sur			3	Select Households
5	print q	cond sur			4	Print Questionnaire
6	trn per	cond sur			3	Train Personnel
7	cond sur	analyze			10	Conduct Survey
8	analyze				6	Analyze Results

Obs	phase	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	Plan	01JUL03	07JUL03	01JUL03	07JUL03	0	0
2	Prepare	08JUL03	14JUL03	08JUL03	14JUL03	0	0
3	Plan	08JUL03	10JUL03	09JUL03	11JUL03	1	0
4	Prepare	11JUL03	15JUL03	15JUL03	17JUL03	2	2
5	Prepare	11JUL03	16JUL03	14JUL03	17JUL03	1	1
6	Prepare	15JUL03	17JUL03	15JUL03	17JUL03	0	0
7	Implement	18JUL03	31JUL03	18JUL03	31JUL03	0	0
8	Implement	01AUG03	08AUG03	01AUG03	08AUG03	0	0

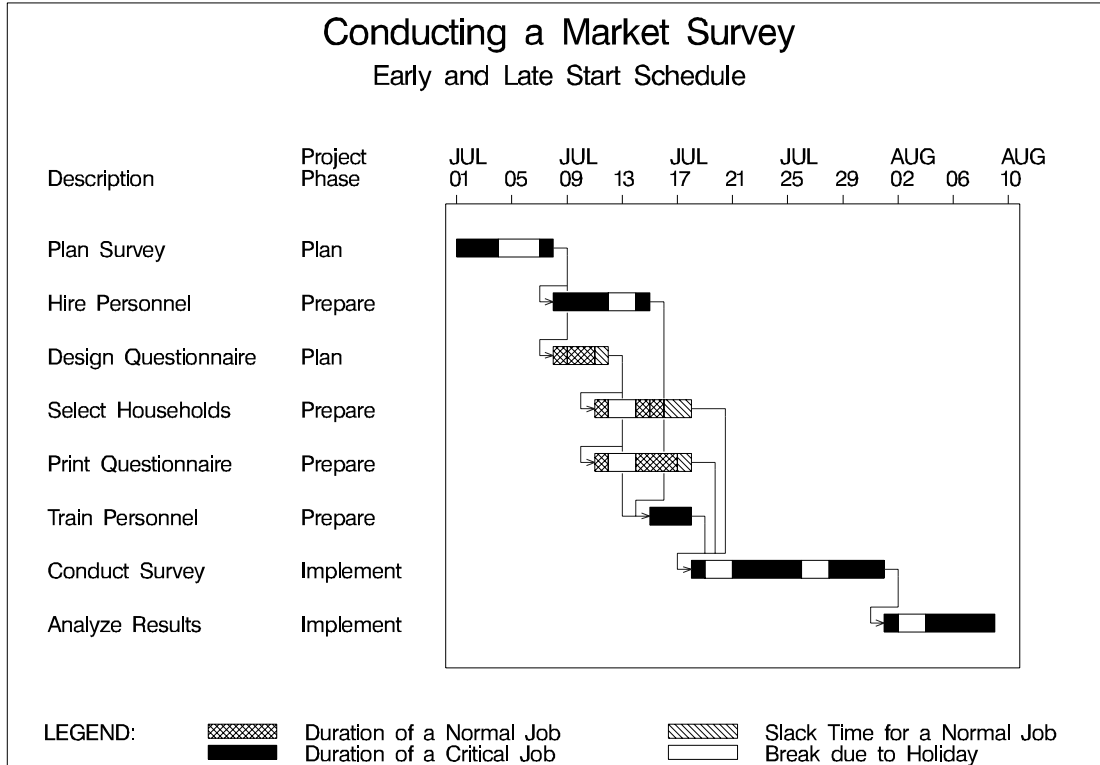
The schedule produced by PROC CPM is then graphed by invoking PROC GANTT, as shown in the following code. The CALENDAR procedure or NETDRAW procedure can also be used to display the schedule. The Gantt chart produced is shown in [Output 1.3.2](#). Note that the precedence relationships are displayed on the Gantt chart.

```

options hpos=80 vpos=43;

title c=black f=swiss 'Conducting a Market Survey';
title2 c=black f=swiss h=1.5 'Early and Late Start Schedule';
proc gantt graphics data=survschd holiday=holiday;
  chart / holiday=(hol) interval=weekday
        font=swiss skip=2 height=1.2 nojobnum
        compress noextrange
        activity=activity succ=(succ1-succ3)
        cprec=blue caxis=black ;
  id id phase;
run;

```

Output 1.3.2. Gantt Chart of SURVEY Project

Example 1.4. Summary Report

As mentioned in the “Data Flow” section beginning on page 3, the output data set can be manipulated in several different ways. You can subset the project data to report progress on selected activities, or you can produce reports sorted by a particular field or grouped according to a natural division of the project activities. For large projects, you may want to get a summarized view of the schedule, with the start and finish times of only the major phases of the project.

For the survey project, suppose that you want a condensed report, containing only information about the start and finish times of the three different phases of the project. The following program summarizes the information in the data set `survschd` and produces a Gantt chart of the summarized schedule (shown in [Output 1.4.1](#)).

```
proc sort data=survschd;
  by phase;
run;

proc summary data=survschd;
  by phase;
  output out=sumsched min(e_start)= max(e_finish)= ;
  var e_start e_finish;
run;

proc sort data=sumsched;
  by e_start;
```

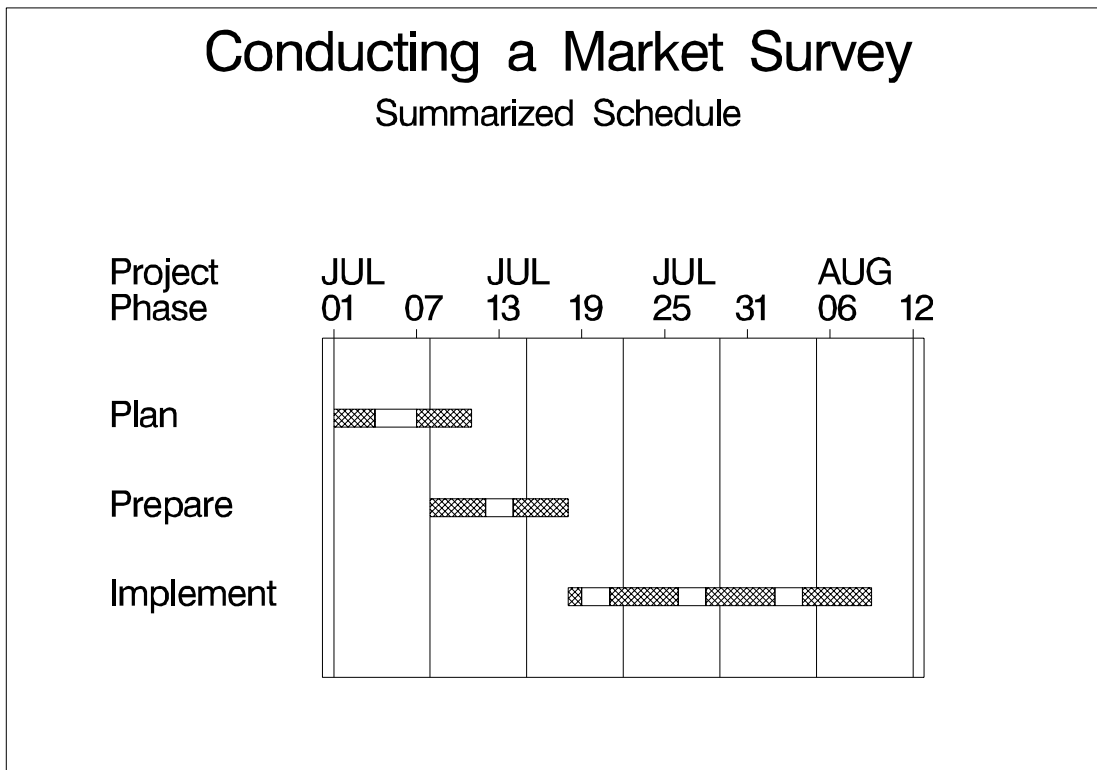
```

format e_start e_finish date7.;
run;

goptions hpos=80 vpos=43;
title c=black f=swiss h=3 'Conducting a Market Survey';
title2 c=black f=swiss h=2 'Summarized Schedule';

proc gantt data=sumsched graphics
  holidata=holidata;
  id phase;
  chart / nojobnum
    nolegend font=swiss
    interval=weekday
    height=2 skip=4
    ref='01jul03'd to '15aug03'd by week
    caxis=black
    holiday=(hol);
run;

```

Output 1.4.1. Summary Gantt Chart of SURVEY Project

Example 1.5. Resource-Constrained Scheduling

The previous two examples illustrated some of the reports that can be generated using the Schedule output data set produced by PROC CPM. This section illustrates the use of PROC CPM to perform resource-constrained scheduling and to obtain a resource Usage output data set for generating reports of resource utilization during the course of a project. A primary concern in data processing centers is the number of processors

needed to perform various tasks. Given a series of programming tasks, a common question faced by a data center operator is how to allocate computer resources to the various tasks.

Consider a simple job that involves sorting six data sets A, B, C, D, E, and F, merging the first three into one master data set, merging the last three into another comparison data set, and then comparing the two merged data sets. The precedence constraints between the activities (captured by the variables `task` and `succ`), the time required by the activities (the variable `dur`), and the resource required (the variable `processor`) are shown in the following code:

```

data program;
  format task $8. succ $8. ;
  input task & succ & dur processor;
  datalines;
Sort A      Merge 1      5      1
Sort B      Merge 1      4      1
Sort C      Merge 1      3      1
Sort D      Merge 2      6      1
Sort E      Merge 2      4      1
Sort F      Merge 2      6      1
Merge 1     Compare     5      1
Merge 2     Compare     4      1
Compare     .           5      1
;

```

If the programming project is scheduled (in absolute units) without any resource constraints, it will take 15 time units for completion and will require a maximum availability of six processors. Suppose now that only two processors are available. The `resin` data set limits the availability of the resource to 2, and PROC CPM is invoked with two input data sets (Activity data set `program` and Resource data set `resin`) to produce a resource-constrained schedule.

PROC CPM produces two output data sets. The Schedule data set (`progschd`) contains the resource-constrained schedule (`S_START` and `S_FINISH` variables) in addition to the early and late start unconstrained schedules. The Usage data set (`progrout`) shows the number of processors required at every unit of time, if the early start schedule or the late start schedule or the resource-constrained schedule were followed, in the variables `eprocessor`, `lprocessor`, and `rprocessor`, respectively; the variable `aprocessor` shows the number of processors remaining after resource allocation. The two output data sets are displayed in [Output 1.5.1](#).

```

data resin;
  input per processor;
  datalines;
0 2
;

proc cpm data=program resin=resin
  out=progschd resout=progrout;

```

```
activity task;
duration dur;
successor succ;
resource processor/per=per;
run;

title 'Scheduling Programming Tasks';
title2 'Data Set PROGSCHD';
proc print data=progschd;
run;

title2 'Data Set PROGROUT';
proc print data=progrout;
run;
```

The Schedule and Usage data sets, displayed in [Output 1.5.1](#), can be used to generate any type of report concerning the schedules or processor usage. In the following program, the unconstrained and constrained schedules are first plotted using PROC GANTT (see [Output 1.5.2](#)).

Output 1.5.1. Data Sets PROGSCHD and PROGROUT

Scheduling Programming Tasks						
Data Set PROGSCHD						
Obs	task	succ	dur	processor	S_START	S_FINISH
1	Sort A	Merge 1	5	1	0	5
2	Sort B	Merge 1	4	1	6	10
3	Sort C	Merge 1	3	1	10	13
4	Sort D	Merge 2	6	1	0	6
5	Sort E	Merge 2	4	1	11	15
6	Sort F	Merge 2	6	1	5	11
7	Merge 1	Compare	5	1	13	18
8	Merge 2	Compare	4	1	15	19
9	Compare		5	1	19	24

Obs	E_START	E_FINISH	L_START	L_FINISH
1	0	5	0	5
2	0	4	1	5
3	0	3	2	5
4	0	6	0	6
5	0	4	2	6
6	0	6	0	6
7	5	10	5	10
8	6	10	6	10
9	10	15	10	15

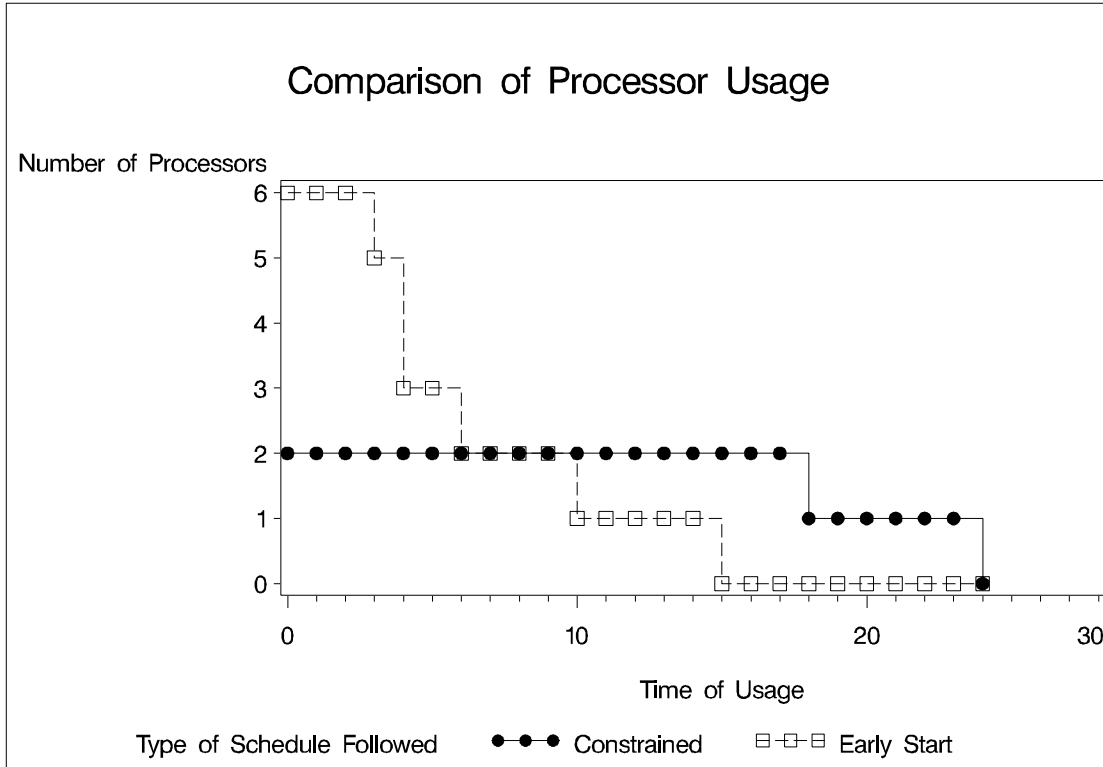
Data Set PROGROUT					
Obs	_TIME_	Eprocessor	Lprocessor	Rprocessor	Aprocessor
1	0	6	3	2	0
2	1	6	4	2	0
3	2	6	6	2	0
4	3	5	6	2	0
5	4	3	6	2	0
6	5	3	4	2	0
7	6	2	2	2	0
8	7	2	2	2	0
9	8	2	2	2	0
10	9	2	2	2	0
11	10	1	1	2	0
12	11	1	1	2	0
13	12	1	1	2	0
14	13	1	1	2	0
15	14	1	1	2	0
16	15	0	0	2	0
17	16	0	0	2	0
18	17	0	0	2	0
19	18	0	0	1	1
20	19	0	0	1	1
21	20	0	0	1	1
22	21	0	0	1	1
23	22	0	0	1	1
24	23	0	0	1	1
25	24	0	0	0	2

```

goptions hpos=80 vpos=43;
title f=swiss 'Scheduling Programming Tasks';
title2 f=swiss h=1.5 'Comparison of Schedules';
proc gantt data=progschd graphics;
  chart / font=swiss increment=2 caxis=black;
  id task;
run;

```

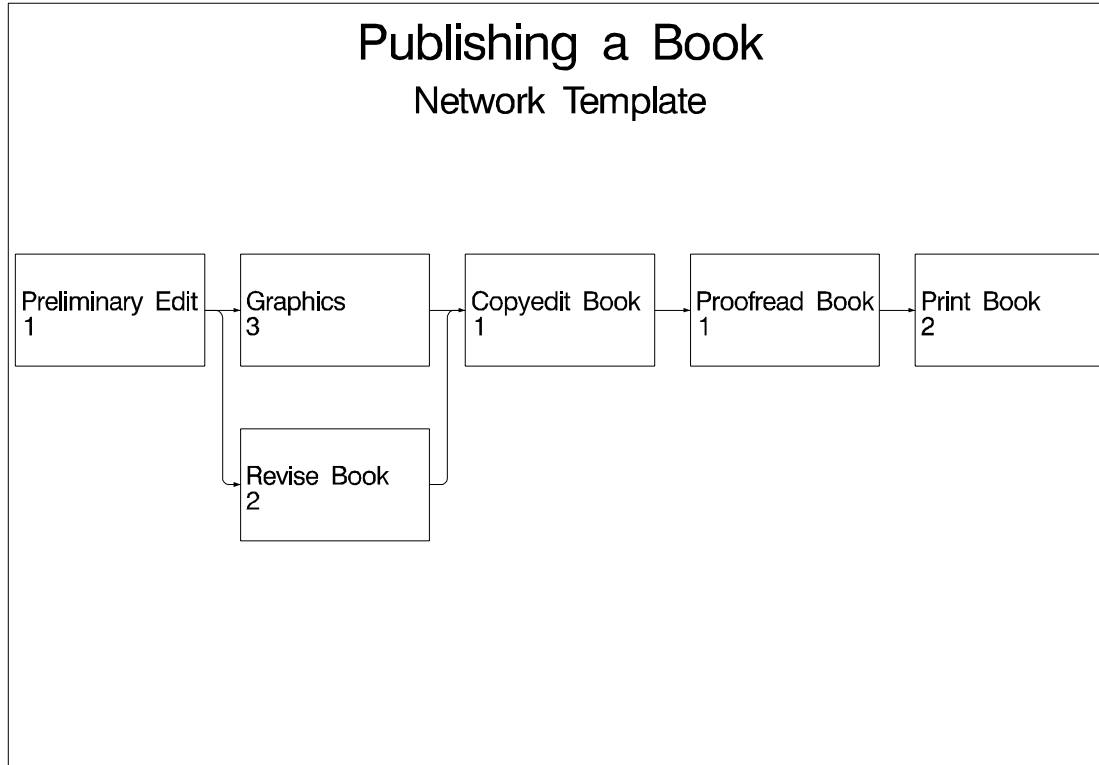

Output 1.5.3. Plot Comparing Resource Usage



Example 1.6. Multiple Projects

Often a project is divided into several subprojects, each of which is then broken into activities with precedence constraints. For reporting or accounting purposes, it may be essential to group activities or to aggregate the information pertaining to activities in a given group. Sometimes, totally different projects use a common pool of resources and you may want to schedule all the projects using the common pool; you may want to vary the priority with which the resources are allotted to the activities on the basis of the projects to which they belong. Often, you have several projects that are essentially the same, with only a few minor differences; these projects may also share a common pool of resources. In such cases, you may want to have a project *template* listing all the activities and their precedence relationships; for each specific project you can copy the template, make any modifications that are necessary for the given scenario, and determine the project schedule accordingly.

This example illustrates some of these possibilities for a multiproject scenario. The project is first scheduled using PROC CPM, and then the PM procedure is used with the same input data set to illustrate the project displayed in the PM Window.

Output 1.6.1. Network Diagram for Project Book

Consider a publishing company that accepts manuscripts from different authors for publication. The publication of each book can be treated as a project. Thus, at a given point in time, several projects, almost identical in nature, may be in progress. Some of the resources that may be needed are a technical editor, a copyeditor, and a graphic artist. All the books that are currently being worked on share a common pool of these resources. This example uses a simplified version of such a scenario to illustrate some of the ways in which you can handle multiple projects competing for the same pool of resources.

The network in [Output 1.6.1](#) represents some of the tasks required to publish one book and the precedence constraints among these tasks; the durations in the diagram are in weeks. Suppose that the *generic* project data are in the data set **book**, which is displayed in [Output 1.6.2](#). This data set is used as a *template* for creating the Activity data set for any book publishing project.

Suppose that the company is working on two books simultaneously. The editor and artist must now allocate their time between the two books. The following program uses the *template* data set **book** to create Activity data sets **book1** and **book2** corresponding to the publication of each book. Any modifications to the generic project data can be made in the DATA step or by using PROC PM. In this example, the duration for the first activity, ‘Preliminary Edit,’ is changed to two weeks for the second book. The two Activity data sets **book1** and **book2** are also displayed in [Output 1.6.2](#).

```

data book1;
  length act $6. succ $6.;

```

```
set book;
subproj = "Book 1";
act = "B1"||task;
if succ ^= " " then succ = "B1"||succ;
run;

title 'Publishing Book 1';
proc print data=book1;
  var subproj task act succ id dur editor artist;
run;

data book2;
  length act $6. succ $6.;
  set book;
  subproj = "Book 2";
  act = "B2"||task;
  if act = "B2P EDT" then dur = 2;
  if succ ^= " " then succ = "B2"||succ;
run;

title 'Publishing Book 2';
proc print data=book2;
  var subproj task act succ id dur editor artist;
run;
```

Output 1.6.2. Template and Activity Data Sets for Book Publishing Example

Publishing a Book Template Data Set						
Obs	id	task	dur	succ	editor	artist
1	Preliminary Edit	PEDT	1	REV	1	.
2	Preliminary Edit	PEDT	1	GRPH	1	.
3	Revise Book	REV	2	CEDT	1	.
4	Graphics	GRPH	3	CEDT	.	1
5	Copyedit Book	CEDT	1	PRF	1	.
6	Proofread Book	PRF	1	PRNT	1	.
7	Print Book	PRNT	2	.	.	.

Publishing Book 1								
Obs	subproj	task	act	succ	id	dur	editor	artist
1	Book 1	PEDT	B1PEDT	B1REV	Preliminary Edit	1	1	.
2	Book 1	PEDT	B1PEDT	B1GRPH	Preliminary Edit	1	1	.
3	Book 1	REV	B1REV	B1CEDT	Revise Book	2	1	.
4	Book 1	GRPH	B1GRPH	B1CEDT	Graphics	3	.	1
5	Book 1	CEDT	B1CEDT	B1PRF	Copyedit Book	1	1	.
6	Book 1	PRF	B1PRF	B1PRNT	Proofread Book	1	1	.
7	Book 1	PRNT	B1PRNT		Print Book	2	.	.

Publishing Book 2								
Obs	subproj	task	act	succ	id	dur	editor	artist
1	Book 2	PEDT	B2PEDT	B2REV	Preliminary Edit	2	1	.
2	Book 2	PEDT	B2PEDT	B2GRPH	Preliminary Edit	2	1	.
3	Book 2	REV	B2REV	B2CEDT	Revise Book	2	1	.
4	Book 2	GRPH	B2GRPH	B2CEDT	Graphics	3	.	1
5	Book 2	CEDT	B2CEDT	B2PRF	Copyedit Book	1	1	.
6	Book 2	PRF	B2PRF	B2PRNT	Proofread Book	1	1	.
7	Book 2	PRNT	B2PRNT		Print Book	2	.	.

As a next step, the data sets for the two subprojects are combined to form an Activity data set for the entire project. A variable `priority` is assigned the value '1' for activities pertaining to the first book and the value '2' for those pertaining to the second one. In other words, Book 1 has priority over Book 2. The Resource data set specifies the availability for each of the resources to be 1. The input data sets, `books` and `resource`, are displayed in [Output 1.6.3](#).

```

data books;
  set book1 book2;
  if subproj = "Book 1" then priority = 1;
  else priority = 2;
run;

title 'Publishing Books 1 and 2';
proc print data=books;
  var subproj priority task act succ id dur editor artist;
run;

data resource;
  input avdate & date7. editor artist;
  format avdate date7.;
  datalines;

```



```

1jan03  1  1
;

title 'Resources Available';
proc print data=resource;
run;

```

Output 1.6.3. Input Data Sets for Book Publishing Example

Publishing Books 1 and 2										
Obs	subproj	priority	task	act	succ	id	dur	editor	artist	
1	Book 1	1	PEDT	B1PEDT	B1REV	Preliminary Edit	1	1	.	
2	Book 1	1	PEDT	B1PEDT	B1GRPH	Preliminary Edit	1	1	.	
3	Book 1	1	REV	B1REV	B1CEDT	Revise Book	2	1	.	
4	Book 1	1	GRPH	B1GRPH	B1CEDT	Graphics	3	.	1	
5	Book 1	1	CEDT	B1CEDT	B1PRF	Copyedit Book	1	1	.	
6	Book 1	1	PRF	B1PRF	B1PRNT	Proofread Book	1	1	.	
7	Book 1	1	PRNT	B1PRNT		Print Book	2	.	.	
8	Book 2	2	PEDT	B2PEDT	B2REV	Preliminary Edit	2	1	.	
9	Book 2	2	PEDT	B2PEDT	B2GRPH	Preliminary Edit	2	1	.	
10	Book 2	2	REV	B2REV	B2CEDT	Revise Book	2	1	.	
11	Book 2	2	GRPH	B2GRPH	B2CEDT	Graphics	3	.	1	
12	Book 2	2	CEDT	B2CEDT	B2PRF	Copyedit Book	1	1	.	
13	Book 2	2	PRF	B2PRF	B2PRNT	Proofread Book	1	1	.	
14	Book 2	2	PRNT	B2PRNT		Print Book	2	.	.	

Resources Available				
Obs	avdate	editor	artist	
1	01JAN03	1	1	

PROC CPM is then invoked to schedule the project to start on January 1, 2003. The PROJECT statement is used to indicate the subproject to which each activity belongs. The data set bookschd (displayed in [Output 1.6.4](#)) contains the schedule for the entire project. The ADDACT option on the PROC CPM statement adds observations for each of the subprojects, 'Book 1' and 'Book 2,' as well as one observation for the entire project. These observations are added at the end of the list of the observations corresponding to the observations in the input data set. The Usage data set booksout is also displayed in [Output 1.6.4](#).

```

proc cpm data=books resin=resource
out=bookschd resout=booksout
date='1jan03'd interval=week
addact;
act      act;
dur      dur;
succ     succ;
resource editor artist / per=avdate avp rcp
rule=actprty actprty=priority
delayanalysis;

id      id task;

```

```
project subproj;  
run;
```

Compare the E_START and S_START schedules (in the data set `bookschd`) and note that on January 1, the activity 'B1PEDT' for Book1 is scheduled to start while the preliminary editing of book 2 (activity B2PEDT) has been postponed, due to subproject 'Book 1' having priority over subproject 'Book 2.' On January 22, there is no activity belonging to subproject 'Book 1' that demands an editor; thus, the activity 'B2PEDT' is scheduled to start on that day. As a result, the editor is working on an activity in the second project for two weeks starting from January 22, 2003; when 'B1CEDT' is ready to start, the editor is not available, causing a delay in this activity. Thus, even though the first book has priority over the second book, the scheduling algorithm does not keep a resource waiting for activities in the first project. However, if you enable activity splitting, you can reclaim the resource for the first book by allowing activities in the second project to be split, if necessary. For details regarding the scheduling algorithm allowing splitting of activities, see [Chapter 2, "The CPM Procedure."](#)

Note: The entire project finishes on April 1, 2003; resource constraints have delayed project completion by four weeks. The variable `R_DELAY` in the Schedule data set `bookschd` indicates the amount of delay in weeks caused by resource constraints. The value of `R_DELAY` does not include any delay in the activity that is caused by a resource delay in one of its predecessors. See [Example 2.15 in Chapter 2, "The CPM Procedure,"](#) for more details about the `R_DELAY` variable.

Output 1.6.4. Data Sets BOOKSCHD and BOOKSOUT

Schedule for Project BOOKS										
		P	P					e	a	S
	s	R	R					d	r	—
	u	O	O					i	t	S
	b	J	J					t	r	T
	P	—	—	s				a	t	A
O	r	D	L	a	u	d		s	i	R
b	o	U	E	c	c	u		s	o	R
s	j	R	V	t	c	r	d	k	r	T
1	Book 1	.	2	B1PEDT	B1REV	1	Preliminary Edit	PEDT	1	01JAN03
2	Book 1	.	2	B1PEDT	B1GRPH	1	Preliminary Edit	PEDT	1	01JAN03
3	Book 1	.	2	B1REV	B1CEDT	2	Revise Book	REV	1	08JAN03
4	Book 1	.	2	B1GRPH	B1CEDT	3	Graphics	GRPH	1	08JAN03
5	Book 1	.	2	B1CEDT	B1PRF	1	Copyedit Book	CEDT	1	05FEB03
6	Book 1	.	2	B1PRF	B1PRNT	1	Proofread Book	PRF	1	12FEB03
7	Book 1	.	2	B1PRNT		2	Print Book	PRNT	.	19FEB03
8	Book 2	.	2	B2PEDT	B2REV	2	Preliminary Edit	PEDT	1	22JAN03
9	Book 2	.	2	B2PEDT	B2GRPH	2	Preliminary Edit	PEDT	1	22JAN03
10	Book 2	.	2	B2REV	B2CEDT	2	Revise Book	REV	1	19FEB03
11	Book 2	.	2	B2GRPH	B2CEDT	3	Graphics	GRPH	1	05FEB03
12	Book 2	.	2	B2CEDT	B2PRF	1	Copyedit Book	CEDT	1	05MAR03
13	Book 2	.	2	B2PRF	B2PRNT	1	Proofread Book	PRF	1	12MAR03
14	Book 2	.	2	B2PRNT		2	Print Book	PRNT	.	19MAR03
15		9	1	Book 1		.			.	01JAN03
16		10	1	Book 2		.			.	22JAN03
17		13	0			.			.	01JAN03

	S		E	E	L	L	R	D	S
	—		—	—	—	—	—	—	—
	F		S	I	S	I	D	E	U
	I		T	N	T	N	E	A	P
O	N		A	I	A	I	L	Y	L
b	S		R	S	R	S	A	—	—
s	H		T	H	T	H	Y	R	R
1	07JAN03		01JAN03	07JAN03	08JAN03	14JAN03	0		
2	07JAN03		01JAN03	07JAN03	08JAN03	14JAN03	0		
3	21JAN03		08JAN03	21JAN03	22JAN03	04FEB03	0		
4	28JAN03		08JAN03	28JAN03	15JAN03	04FEB03	0		
5	11FEB03		29JAN03	04FEB03	05FEB03	11FEB03	1	editor	
6	18FEB03		05FEB03	11FEB03	12FEB03	18FEB03	0		
7	04MAR03		12FEB03	25FEB03	19FEB03	04MAR03	0		
8	04FEB03		01JAN03	14JAN03	01JAN03	14JAN03	3	editor	
9	04FEB03		01JAN03	14JAN03	01JAN03	14JAN03	3	editor	
10	04MAR03		15JAN03	28JAN03	22JAN03	04FEB03	2	editor	
11	25FEB03		15JAN03	04FEB03	15JAN03	04FEB03	0		
12	11MAR03		05FEB03	11FEB03	05FEB03	11FEB03	0		
13	18MAR03		12FEB03	18FEB03	12FEB03	18FEB03	0		
14	01APR03		19FEB03	04MAR03	19FEB03	04MAR03	0		
15	04MAR03		01JAN03	25FEB03	08JAN03	04MAR03	0		
16	01APR03		01JAN03	04MAR03	01JAN03	04MAR03	3		
17	01APR03		01JAN03	04MAR03	01JAN03	04MAR03	0		

Resource Usage for Project BOOKS					
Obs	_TIME_	Reditor	Aeditor	Rartist	Aartist
1	01JAN03	1	0	0	1
2	08JAN03	1	0	1	0
3	15JAN03	1	0	1	0
4	22JAN03	1	0	1	0
5	29JAN03	1	0	0	1
6	05FEB03	1	0	1	0
7	12FEB03	1	0	1	0
8	19FEB03	1	0	1	0
9	26FEB03	1	0	0	1
10	05MAR03	1	0	0	1
11	12MAR03	1	0	0	1
12	19MAR03	0	1	0	1
13	26MAR03	0	1	0	1
14	02APR03	0	1	0	1

The output data sets `bookschd` and `bookout` can be used to produce graphical reports of the schedule and the resource usage. In particular, the `Schedule` data set can be used to produce a zoned, time-scaled network diagram as shown in [Output 1.6.5](#). The program used to produce the network diagram is shown in the following code. In this example, only the leaf tasks (those without any subtasks) are used to draw the network diagram. Further, the activities are aligned according to the resource-constrained start times and grouped according to the subproject.

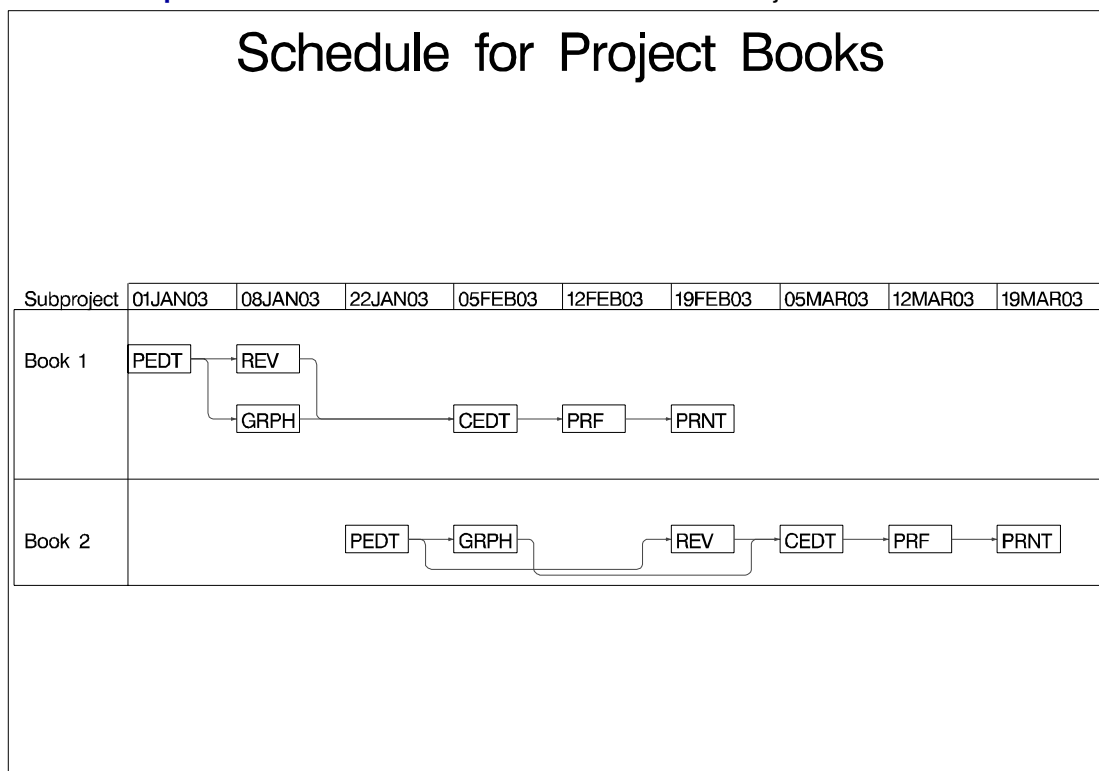
```

goptions hpos=98 vpos=60;
pattern1 v=e c=green;
pattern2 v=e c=red;
title c=black f=swiss h=4 'Schedule for Project Books';

proc netdraw data=bookschd(where=(proj_dur=.) graphics;
  actnet / act=task succ=succ font=swiss
          id=(task) nodefid nolabel
          xbetween=8 htext=3 pcompress
          zone=subproj zonepat zonespace
          align=s_start separatearcs;
  label subproj = 'Subproject';
run;

```

Output 1.6.5. Resource Constrained Schedule for Project Books



The same project can also be scheduled using the `PM` procedure, as shown in the following statements. The resulting `PM Window` is shown in [Output 1.6.6](#). The advantage with using `PROC PM` is that you can use the `PM Window` to edit the activity information, such as the durations, resource requirements, and so forth.

```

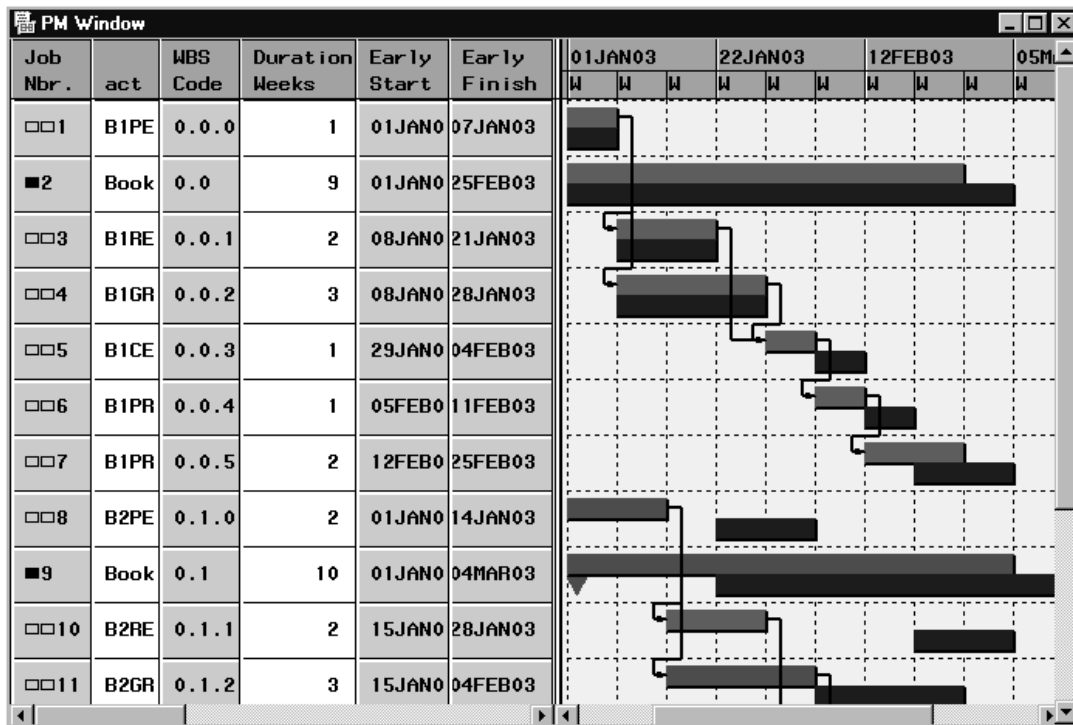
proc pm data=books resin=resource
      out=pmsched resout=pmrout
      date='1jan03'd interval=week;

  act      act;
  dur      dur;
  succ     succ;
  resource editor artist / per=avdate
          avp rcp
          rule=actprty
          actprty=priority
          delayanalysis;

  id      id task;
  project subproj;
run;

```

Output 1.6.6. PM Window on Book Project



Example 1.7. Sequential Scheduling of Projects

Suppose the schedule displayed in [Output 1.6.4](#) is not acceptable; you want the first book to be finished as soon as possible and do not want resources to be claimed by the second book at the cost of the first book. One way to accomplish this is to enable activities related to the second book to be split whenever the first book demands a resource currently in use by the second book. If you do not want activities to be split, you can still accomplish your goal by sequential scheduling. The structure of the input and output data sets enables you to schedule the two subprojects sequentially.

This example illustrates the sequential scheduling of subprojects 'Book 1' and 'Book 2.' The following program first schedules the subproject 'Book 1' using the resources

available. The resulting schedule is displayed in [Output 1.7.1](#). The Usage data set bk1out is also displayed in [Output 1.7.1](#).

```

/* Schedule the higher priority project first */
proc cpm data=book1 resin=resource
    out=bk1schd resout=bk1out
    date='1jan03'd interval=week;
    act      act;
    dur      dur;
    succ     succ;
    resource editor artist / per=avdate avp rcp;
    id       id;
run;

```

Output 1.7.1. Sequential Scheduling of Subprojects: Book 1

Schedule for sub-project BOOK1							
Obs	act	succ	dur	id	editor	artist	S_START
1	B1PEDT	B1REV	1	Preliminary Edit	1	.	01JAN03
2	B1PEDT	B1GRPH	1	Preliminary Edit	1	.	01JAN03
3	B1REV	B1CEDT	2	Revise Book	1	.	08JAN03
4	B1GRPH	B1CEDT	3	Graphics	.	1	08JAN03
5	B1CEDT	B1PRF	1	Copyedit Book	1	.	29JAN03
6	B1PRF	B1PRNT	1	Proofread Book	1	.	05FEB03
7	B1PRNT		2	Print Book	.	.	12FEB03

Obs	S_FINISH	E_START	E_FINISH	L_START	L_FINISH
1	07JAN03	01JAN03	07JAN03	01JAN03	07JAN03
2	07JAN03	01JAN03	07JAN03	01JAN03	07JAN03
3	21JAN03	08JAN03	21JAN03	15JAN03	28JAN03
4	28JAN03	08JAN03	28JAN03	08JAN03	28JAN03
5	04FEB03	29JAN03	04FEB03	29JAN03	04FEB03
6	11FEB03	05FEB03	11FEB03	05FEB03	11FEB03
7	25FEB03	12FEB03	25FEB03	12FEB03	25FEB03

Resource Usage for sub-project BOOK1					
Obs	_TIME_	Reditor	Aeditor	Rartist	Aartist
1	01JAN03	1	0	0	1
2	08JAN03	1	0	1	0
3	15JAN03	1	0	1	0
4	22JAN03	0	1	1	0
5	29JAN03	1	0	0	1
6	05FEB03	1	0	0	1
7	12FEB03	0	1	0	1
8	19FEB03	0	1	0	1
9	26FEB03	0	1	0	1

The Usage data set produced by PROC CPM has two variables, *Aeditor* and *Aartist*, showing the availability of the editor and the artist on each day of the project, *after* scheduling subproject 'Book 1.' This data set is used to create the data set *remres*, listing the remaining resources available, which is then used as the Resource input data set for scheduling the subproject 'Book 2.' The following program shows the DATA step and the invocation of PROC CPM.

The schedule for publishing 'Book 2' is displayed in [Output 1.7.2](#). The Usage data set *bk2out* is also displayed in [Output 1.7.2](#). Note that this method of scheduling has

ensured that 'Book 1' is not delayed; however, the entire project has been delayed by two more weeks, resulting in a total delay of six weeks.

```

/* Construct the Resource availability data set */
/* with proper resource names */
data remres;
  set bklout;
  avdate=_time_;
  editor=aeditor;
  artist=aartist;
  keep avdate editor artist;
  format avdate date7.;
run;

proc cpm data=book2 resin=remres
  out=bk2sched resout=bk2out
  date='1jan03'd interval=week;
  act      act;
  dur      dur;
  succ     succ;
  resource editor artist / per=avdate avp rcp;
  id      id;
run;

```

Output 1.7.2. Sequential Scheduling of Subprojects: Book 2

Schedule for sub-project BOOK2							
Obs	act	succ	dur	id	editor	artist	S_START
1	B2PEDT	B2REV	2	Preliminary Edit	1	.	12FEB03
2	B2PEDT	B2GRPH	2	Preliminary Edit	1	.	12FEB03
3	B2REV	B2CEDT	2	Revise Book	1	.	26FEB03
4	B2GRPH	B2CEDT	3	Graphics	.	1	26FEB03
5	B2CEDT	B2PRF	1	Copyedit Book	1	.	19MAR03
6	B2PRF	B2PRNT	1	Proofread Book	1	.	26MAR03
7	B2PRNT		2	Print Book	.	.	02APR03

Obs	S_FINISH	E_START	E_FINISH	L_START	L_FINISH
1	25FEB03	01JAN03	14JAN03	01JAN03	14JAN03
2	25FEB03	01JAN03	14JAN03	01JAN03	14JAN03
3	11MAR03	15JAN03	28JAN03	22JAN03	04FEB03
4	18MAR03	15JAN03	04FEB03	15JAN03	04FEB03
5	25MAR03	05FEB03	11FEB03	05FEB03	11FEB03
6	01APR03	12FEB03	18FEB03	12FEB03	18FEB03
7	15APR03	19FEB03	04MAR03	19FEB03	04MAR03

Resource Usage for sub-project BOOK2					
Obs	_TIME_	Reditor	Aeditor	Rartist	Aartist
1	12FEB03	1	0	0	1
2	19FEB03	1	0	0	1
3	26FEB03	1	0	1	0
4	05MAR03	1	0	1	0
5	12MAR03	0	1	1	0
6	19MAR03	1	0	0	1
7	26MAR03	1	0	0	1
8	02APR03	0	1	0	1
9	09APR03	0	1	0	1
10	16APR03	0	1	0	1

Example 1.8. Project Cost Control

Cost control and accounting are important aspects of project management. Cost data for a project may be associated with activities or groups of activities, or with resources, such as personnel or equipment. For example, consider a project that consists of several subprojects, each of which is contracted to a different company. From the contracting company's point of view, each subproject can be treated as one cost item; all the company needs to know is how much each subproject is going to cost. On the other hand, another project may contain several activities, each of which requires two types of labor, skilled and unskilled. The cost for each activity in the project may have to be computed on the basis of how much skilled or unskilled labor that activity uses. In this case, activity and project costs are determined from the resources used. Further, for any project, there may be several ways in which costs need to be summarized and accounted for. In addition to determining the cost of each individual activity, you may want to determine periodic budgets for different departments that are involved with the project or compare the actual costs that were incurred with the budgeted costs.

It is easy to set up cost accounting systems using the output data sets produced by PROC CPM, whether costs are associated with activities or with resources. In fact, you can even treat cost as a consumable resource if you can estimate the cost per day for each of the activities (see Chapter 2, "The CPM Procedure," for details on resource allocation and types of resources). This example illustrates such a method for monitoring costs and shows how you can compute some of the standard cost performance measures used in project management.

The following three measures can be used to determine if a project is running on schedule and within budget (see Moder, Phillips, and Davis 1983, for a detailed discussion on project cost control):

- *Actual cost of work performed (ACWP)* is the actual cost expended to perform the work accomplished in a given period of time.
- *Budgeted cost of work performed (BCWP)* is the budgeted cost of the work completed in a given period of time.
- *Budgeted cost of work scheduled (BCWS)* is the budgeted cost of the work scheduled to be accomplished in a given period of time (if a baseline schedule were followed).

Consider the survey example described earlier in this chapter. Suppose that it is possible to estimate the cost per day for each activity in the project. The following data set `survcost` contains the project data (`activity`, `succ1–succ3`, `id`, `duration`) and a variable named `cost` containing the cost per day in dollars. In order to compute the BCWS for the project, you need to establish a baseline schedule. Suppose the early start schedule computed by PROC CPM is chosen as the baseline schedule. The Resource data set `costavl` establishes `cost` as a consumable resource, so that the CPM procedure can be used to accumulate costs (using the `CUMUSAGE` option).

The following program invokes PROC CPM with the `RESOURCE` statement and saves the Usage data set in `survrout`. The variable `ecost` in this Usage data set

contains the cumulative expense incurred for the baseline schedule; this is the same as the budgeted cost of work scheduled (or BCWS) saved in the data set `basecost`.

```

data survcost;
  format id $20. activity $8. succ1-succ3 $8. ;
  input id & activity & duration succ1 & succ2 & succ3 & cost;
  datalines;
Plan Survey          plan sur    4 hire per  design q  .          300
Hire Personnel      hire per    5 trn per  .          .          350
Design Questionnaire design q    3 trn per  select h  print q  100
Train Personnel     trn per    3 cond sur .          .          500
Select Households  select h    3 cond sur .          .          300
Print Questionnaire print q    4 cond sur .          .          250
Conduct Survey     cond sur   10 analyze .          .          200
Analyze Results    analyze    6 .          .          .          500
;

data holidata;
  format hol date7.;
  hol = '4jul03'd;
  run;

data costavl;
  input per & date7. otype $ cost;
  format per date7.;
  datalines;
.          restype  2
1jul03  reslevel  12000
;

proc cpm date='1jul03'd interval=weekday
  data=survcost resin=costavl  holidata=holidata
  out=sched  resout=survROUT;
  activity  activity;
  successor succ1-succ3;
  duration  duration;
  holiday   hol;
  id        id;
  resource  cost / period = per
           obstype = otype cumusage;
run;

data basecost (keep = _time_ bcws);
  set survROUT;
  bcws = ecost;
run;

```

Suppose that the project started as planned on July 1, 2003, but some of the activities took longer than planned and some of the cost estimates were found to be incorrect. The following data set, `actual`, contains updated information: the variables `as` and `af` contain the actual start and finish times of the activities that have been completed or are in progress. The variable `actcost` contains the revised cost per day for each activity. The following program combines this information with the existing project

data and saves the result in the data set `update`, displayed in [Output 1.8.1](#). The Resource data set `costavl2` (also displayed in [Output 1.8.1](#)) defines `cost` and `actcost` as consumable resources.

```

data actual;
  format id $20. ;
  input id & as & date9. af & date9. actcost;
  format as af date7.;
  datalines;
Plan Survey          1JUL03    8JUL03    275
Hire Personnel       9JUL03   15JUL03   350
Design Questionnaire 10JUL03  14JUL03   150
Train Personnel      16JUL03  17JUL03   800
Select Households   15JUL03  17JUL03   450
Print Questionnaire  15JUL03  18JUL03   250
Conduct Survey      21JUL03    .         200
;

data update;
  merge survcost actual;
  run;

title 'Activity Data Set UPDATE';
proc print;
  run;

data costavl2;
  input per & date7. otype $ cost actcost;
  format per date7.;
  datalines;
.      restype    2      2
1jul03 reslevel  12000  12000
;

title 'Resource Data Set COSTAVL2';
proc print;
  run;

```

Output 1.8.1. Project Cost Control: Progress Update

Activity Data Set UPDATE				
Obs	id	activity	succ1	succ2
1	Plan Survey	plan sur	hire per	design q
2	Hire Personnel	hire per	trn per	
3	Design Questionnaire	design q	trn per	select h
4	Train Personnel	trn per	cond sur	
5	Select Households	select h	cond sur	
6	Print Questionnaire	print q	cond sur	
7	Conduct Survey	cond sur	analyze	
8	Analyze Results	analyze		

Obs	succ3	duration	cost	as	af	actcost
1		4	300	01JUL03	08JUL03	275
2		5	350	09JUL03	15JUL03	350
3	print q	3	100	10JUL03	14JUL03	150
4		3	500	16JUL03	17JUL03	800
5		3	300	15JUL03	17JUL03	450
6		4	250	15JUL03	18JUL03	250
7		10	200	21JUL03	.	200
8		6	500	.	.	.

Resource Data Set COSTAVL2				
Obs	per	otype	cost	actcost
1	.	restype	2	2
2	01JUL03	reslevel	12000	12000

Next, PROC CPM is used to revise the schedule by using the ACTUAL statement to specify the actual start and finish times and the RESOURCE statement to specify both the budgeted and the actual costs. The resulting schedule is saved in the data set updsched (displayed in [Output 1.8.2](#)) and the budgeted and the actual cumulative costs of the project (until the current date) are saved in the data set updtrout. These cumulative costs represent the budgeted cost of work performed (BCWP) and the actual cost of work performed (ACWP), respectively, and are saved in the data set updtcost. The two data sets basecost and updtcost are then merged to create a data set that contains the three measures: bcws, bcwp, and acwp. The resulting data set is displayed in [Output 1.8.3](#).

```
proc cpm date='1jul03'd interval=weekday
  data=update    resin=costavl2
  out=updsched  resout=updtrout
  holidata=holidata;
  activity activity;
  successor succ1-succ3;
  duration duration;
  holiday hol;
  id id;
  resource cost actcost / per = per
                    obstype = otype
                    maxdate = '21jul03'd cumusage;
  actual / a_start=as a_finish=af;
run;

title 'Updated Schedule: Data Set UPDSCHED';
```

```

proc print data=upsched;
  run;

data updtcost (keep = _time_ bcwp acwp);
  set updtrout;
  bcwp = ecost;
  acwp = eactcost;
  run;

/* Create a combined data set to contain the BCWS, BCWP, ACWP */
/* per day and the cumulative values for these costs.          */
data costs;
  merge basecost updtcost;
  run;

title 'BCWS, BCWP, and ACWP';
proc print data=costs;
  run;

```

Output 1.8.2. Project Cost Control: Updated Schedule

Updated Schedule: Data Set UPDSCHED										
a	s	s	s	d	S	A				
u	u	u	u	r	T	—				
i	c	c	c	a	A	—				
v	c	c	c	t	T	D				
O i	c	c	c	o	U	U i				
b t	1	2	3	n	S	R d				
s y										
1	plan	sur	hire	per	design	q	4	Completed	5	Plan Survey
2	hire	per	trn	per			5	Completed	5	Hire Personnel
3	design	q	trn	per	select	h	3	Completed	3	Design Questionnaire
4	trn	per	cond	sur			3	Completed	2	Train Personnel
5	select	h	cond	sur			3	Completed	3	Select Households
6	print	q	cond	sur			4	Completed	4	Print Questionnaire
7	cond	sur	analyze				10	In Progress	.	Conduct Survey
8	analyze						6	Pending	.	Analyze Results
	a	A	—	S	—	E			L	L
	c	—	F	—	F	—			F	F
	t	S	I	S	I	S			I	I
	c	T	N	T	N	T			N	N
O o	o	A	I	A	I	A			I	I
b s	s	R	S	R	S	R			S	S
s t	t	T	H	T	H	T			H	H
1	300	275	01JUL03	08JUL03	01JUL03	08JUL03	01JUL03	08JUL03	01JUL03	08JUL03
2	350	350	09JUL03	15JUL03	09JUL03	15JUL03	09JUL03	15JUL03	09JUL03	15JUL03
3	100	150	10JUL03	14JUL03	10JUL03	14JUL03	10JUL03	14JUL03	10JUL03	14JUL03
4	500	800	16JUL03	17JUL03	16JUL03	17JUL03	16JUL03	17JUL03	16JUL03	17JUL03
5	300	450	15JUL03	17JUL03	15JUL03	17JUL03	15JUL03	17JUL03	15JUL03	17JUL03
6	250	250	15JUL03	18JUL03	15JUL03	18JUL03	15JUL03	18JUL03	15JUL03	18JUL03
7	200	200	21JUL03	.	21JUL03	01AUG03	21JUL03	01AUG03	21JUL03	01AUG03
8	500	.	.	.	04AUG03	11AUG03	04AUG03	11AUG03	04AUG03	11AUG03

Output 1.8.3. Project Cost Control: BCWS, BCWP, ACWP

BCWS, BCWP, and ACWP				
Obs	_TIME_	bcws	bcwp	acwp
1	01JUL03	0	0	0
2	02JUL03	300	300	275
3	03JUL03	600	600	550
4	07JUL03	900	900	825
5	08JUL03	1200	1200	1100
6	09JUL03	1650	1500	1375
7	10JUL03	2100	1850	1725
8	11JUL03	2550	2300	2225
9	14JUL03	3450	2750	2725
10	15JUL03	4350	3200	3225
11	16JUL03	5400	4100	4275
12	17JUL03	6150	5150	5775
13	18JUL03	6650	6200	7275
14	21JUL03	6850	6450	7525
15	22JUL03	7050	.	.
16	23JUL03	7250	.	.
17	24JUL03	7450	.	.
18	25JUL03	7650	.	.
19	28JUL03	7850	.	.
20	29JUL03	8050	.	.
21	30JUL03	8250	.	.
22	31JUL03	8450	.	.
23	01AUG03	8650	.	.
24	04AUG03	9150	.	.
25	05AUG03	9650	.	.
26	06AUG03	10150	.	.
27	07AUG03	10650	.	.
28	08AUG03	11150	.	.
29	11AUG03	11650	.	.

The data set `COSTS`, containing the required cost information, is then used as input to PROC GGPLOT to produce a plot of the three cumulative cost measures. The plot is shown in [Output 1.8.4](#).

Note: BCWS, BCWP, and ACWP are three of the cost measures used as part of *Earned Value Analysis*, which is an important component of the *Cost/Schedule Control Systems Criteria* (referred to as C/SCSC) that was established in 1967 by the Department of Defense (DOD) to standardize the reporting of cost and schedule performance on major contracts. Refer to Fleming (1988) for a detailed discussion of C/SCSC. Similar methods, such as the ones described in this example, can be used to calculate all the relevant measures for analyzing cost and schedule performance.

```

/* Plot the cumulative costs */
data costplot (keep=date dollars id);
  set costs;
  format date date7.;
  date = _time_;
  if bcws ^= . then do;
    dollars = BCWS; id = 1; output;
  end;
  if bcwp ^= . then do;
    dollars = BCWP; id = 2; output;
  end;

```

```
if acwp ^= . then do;
    dollars = ACWP; id = 3; output;
end;
run;

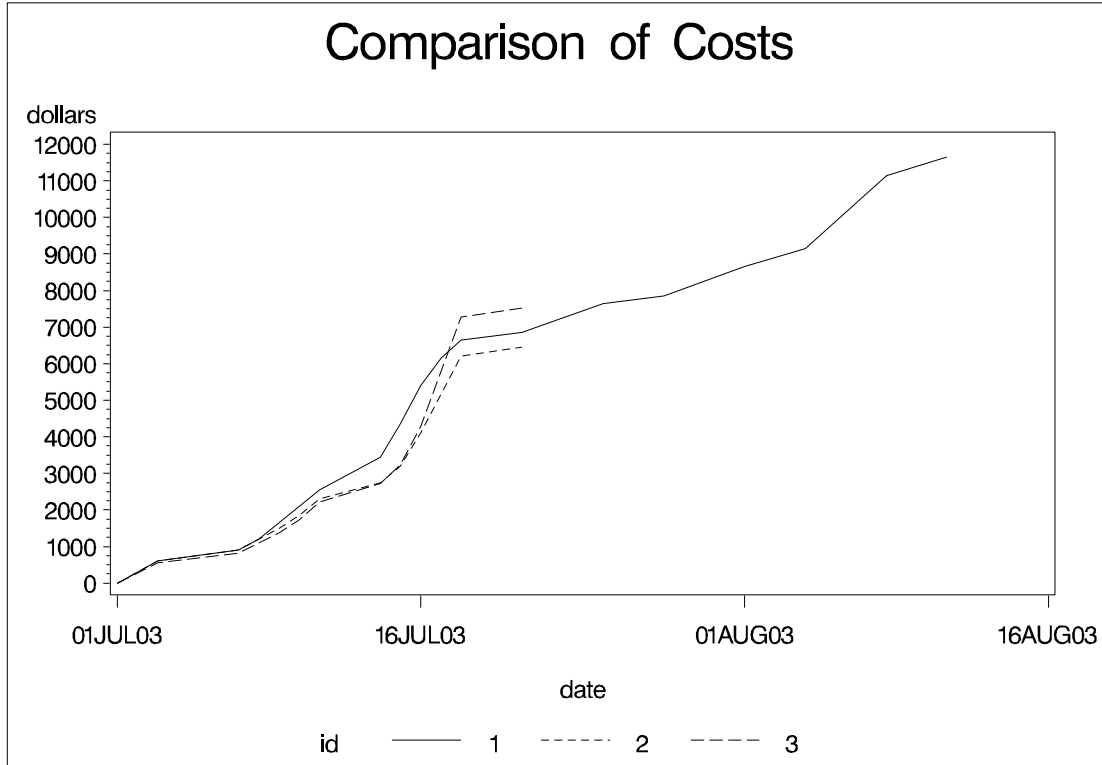
legend1 frame
    value=(f=swiss c=black j=1 f=swiss 'BCWS' 'BCWP' 'ACWP')
    label=(f=swiss c=black);

axis1 width=2
    order=('1jul03'd to '1aug03'd by week)
    length=60 pct
    value=(f=swiss c=black)
    label=(f=swiss c=black);

axis2 width=2
    order=(0 to 12000 by 2000)
    length = 55 pct
    value=(f=swiss c=black)
    label=(f=swiss c=black);

symbol1 i=join v=none c=green w=4 l=1;
symbol2 i=join v=none c=blue w=4 l=2;
symbol3 i=join v=none c=red w=4 l=3;
title f=swiss c=black 'Comparison of Costs';

proc gplot data=costplot;
    plot dollars * date = id / legend=legend1
        haxis=axis1
        vaxis=axis2;
run;
```

Output 1.8.4. Plot of BCWS, BCWP, and ACWP

Example 1.9. Subcontracting Decisions

Making decisions about subcontracting forms an important part of several medium-to-large scale projects. For example, in the pharmaceutical industry, the analysis of clinical trials may be a part of the drug development project that could either be accomplished by the company's statistical group or be subcontracted to a statistical consulting firm. The decision may hinge upon how busy the local statistical group is with other projects that may delay the results of the analysis for the drug in question. Further, there may be more than one firm that is a likely candidate for performing the analysis. As a prerequisite for deciding whether to assign the *analysis* subproject to an external firm, you need to obtain a *bid* in the form of estimates of the cost and project duration from the competing firms as well as a corresponding estimate from the in-house team.

The cost corresponding to each possible subcontracting firm may be a combination of the actual costs (consulting fees and so on) and the tardiness of the project (tardiness being measured as the time difference between when the results are expected to be available and the target date for the availability of the results). The information required could be provided in terms of Gantt charts and cost analysis charts. Using this information, the project manager for the drug development project can use the principles of decision analysis to determine whether to do the analysis in-house or assign it to an outside consulting firm and to pick the firm to which the subcontract is to be assigned. Some of these ideas are illustrated in the following example.

Output 1.9.1. Input Data Sets for Decision Problem

Subcontracting Decision The Stage Data Set					
Obs	_STNAME_	_STTYPE_	_OUTCOM_	_REWARD_	_SUCCES_
1	Assignment	D	In_House	.	Complete
2			Consult1	-20,000	Act_Finish
3			Consult2	-17,500	Act_Finish
4	Complete	C	On_Time	.	Cost
5			Delay	-10,000	Cost
6	Act_Finish	C	Early	.	
7			Late	.	
8			Delay2	-1,000	
9	Cost	C	High	.	
10			Low	.	

Subcontracting Decision The Probability Data Set			
Obs	_GIVEN_	_EVENT_	_PROB_
1		High	0.50
2		Low	0.50
3		On_Time	0.60
4		Delay	0.40
5	Consult1	Early	0.60
6	Consult1	Late	0.35
7	Consult1	Delay2	0.05
8	Consult2	Early	0.50
9	Consult2	Late	0.40
10	Consult2	Delay2	0.10

Subcontracting Decision The Payoffs Data Set			
Obs	_STATE1_	_STATE2_	_VALUE_
1	On_Time	High	-12,000
2	On_Time	Low	-9,500
3	Delay	High	-15,000
4	Delay	Low	-11,500
5	Early		3,500
6	Late		1,500
7	Delay2		0

The stages of the decision problem are identified by the STAGEIN= data set, *stage*, displayed in [Output 1.9.1](#). As a first step, the drug company needs to decide whether to perform the analysis in-house or to assign it to one of two consulting firms. If the in-house team is chosen, the resulting stage is a chance node, called ‘Complete,’ with two possible outcomes: ‘On-Time’ or ‘Delay’; if there is a delay, the resulting cost to the drug company is \$10,000. For each of these two outcomes, there is a second chance event corresponding to the cost of the analysis. For each of the two consulting firms, the outcome can be one of three possibilities: ‘Early,’ ‘Late,’ or ‘Delay2’; if there is a delay, the drug company imposes a delay penalty of \$9,000 on the firm, resulting in a net reward of $-\$1,000$ (penalty of \$9,000 minus the cost of \$10,000).

The PROBIN= data set, `prob`, identifies the various probabilities associated with the different possible outcomes at each of the chance events. The `prob` data set is also displayed in [Output 1.9.1](#).

The rewards (or payoffs) associated with each of the end stages are listed in the PAYOFFS= data set, `payoff` (also listed in [Output 1.9.1](#)). For example, for the in-house team, the high (low) cost associated with completing the analysis on time is \$12,000 (\$9,500), and so on.

The following program invokes PROC DTREE to solve the decision problem. The complete decision tree, displayed in [Output 1.9.2](#), represents the various stages and outcomes of the problem and identifies the optimal decision. In this example, the drug company should award the consulting contract to the second consulting firm as indicated by the dashed line for the corresponding branch of the tree.

See [Chapter 5](#), “The DTREE Procedure,” for details about the DTREE procedure.

```

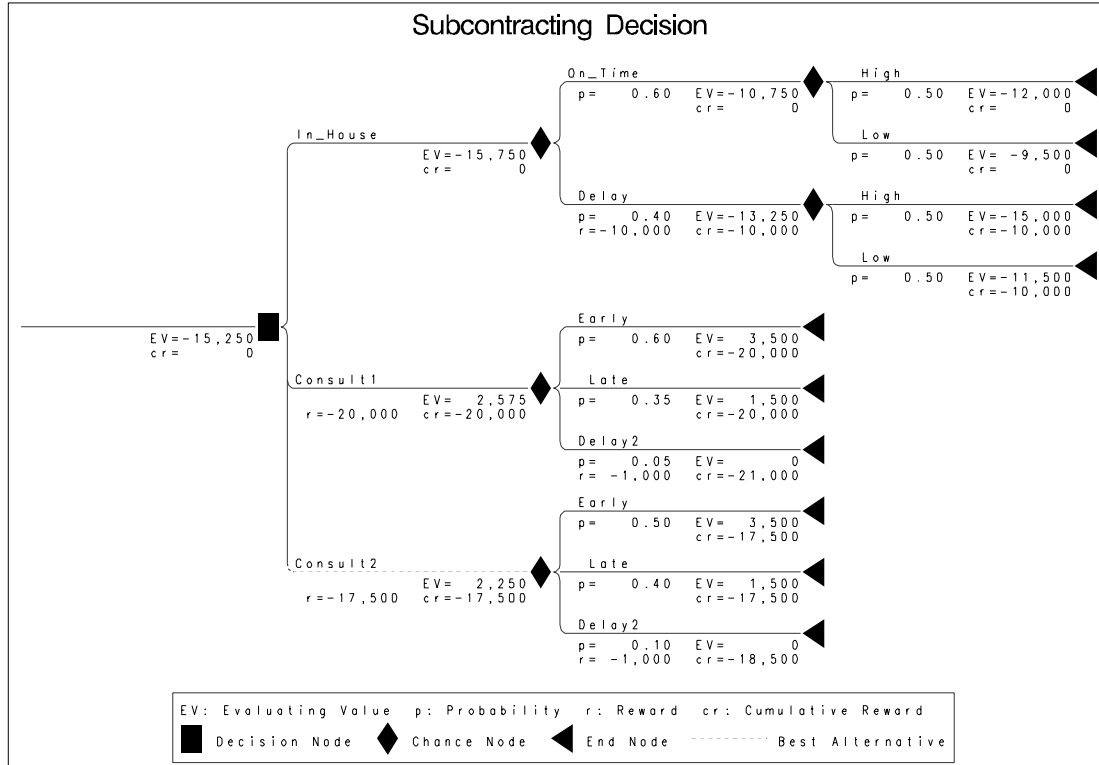
title f=swiss "Subcontracting Decision";

goptions ftext=simplexu;
symbol1 f=marker v=P;
symbol2 f=marker v=U;
symbol3 f=marker v=A;

/* PROC DTREE statements */
proc dtree stagein=stage
      probin=prob
      payoffs=payoff
      nowarning;
  evaluate;
  treeplot / graphics
      compress ybetween=1 cell
      lwidth=1 lwidthb=2 lstyleb=20
      hsymbol=2 symbolc=1
      symbold=2 symbole=3;
quit;

```

Output 1.9.2. Decision Analysis



Project Management Systems

As illustrated in the “Data Flow” section on page 3 and the “Examples” section on page 11, the procedures of SAS/OR software, when combined with the other parts of the SAS System, provide a rich environment for developing customized project management systems. Every company has its own set of requirements for how project data should be handled and for how costs should be accounted. The CPM, GANTT, NETDRAW, and PM procedures, together with the other reporting, summarizing, charting, and plotting procedures, are the basic building blocks that can be combined in several different ways to provide the exact structure that you need. The interactive PM procedure can be used as the primary editing interface for entering all activity information for your projects. Further, the application building tools in the SAS System can be used to cement the pieces together in a menu-driven application. You can create easy-to-use applications enabling the user to enter information continually and to obtain progress reports periodically.

The Projman Application

The **Projman** application is a user-friendly graphical user interface for performing **project management** with the SAS System. Through the use of an interactive Gantt chart window provided by the **PM procedure**, you can easily create and manage multiple projects.

Projman is accessed by invoking the **projman command** in the SAS windowing environment or by selecting **Solutions->Analysis->Project Management** from the primary SAS menu. Projman enables you to define multiple projects, information about which are stored in a **project dictionary data set**. This project dictionary provides a convenient way to manage all the data sets associated with each project.

Projman also provides a variety of project **reports**. These reports include Gantt charts, network diagrams, calendars, and tabular listings as well as resource usage and cost reports. You can modify these reports to add your own personalized reports to the application.

For details about the Projman application, see **Chapter 8, “The Projman Application.”**

Web-Based Scheduling Systems

The examples in this chapter describe several scenarios that illustrate the different ways in which the project management procedures can be used to define, manage, and monitor projects. As described in the previous sections, the SAS System can be used to create comprehensive Decision Support systems or project management systems, in particular, using the procedures described in this book. With the availability of SAS/IntrNet software, you can also create Web-based project management or scheduling systems where the browser is used to display schedules and resource usage information that is updated using the CPM procedure’s scheduling engine.

Examples of such Web-based applications are available at SAS Institute’s external Web site at the following url: <http://support.sas.com/sassamples/demos/supplychain/demos>. In particular, the “Enterprise-Wide Resource Management” (EWRM) demo uses several of the ideas described in this chapter and illustrated in the examples throughout this book to create an application that schedules the tasks required for the maintenance of aircraft engines at a hypothetical service facility.

Note: The EWRM Web demo is a client-server application driven from your desktop and running at SAS Institute in Cary, NC. You can access the demo from SAS Institute’s Supply Chain Web site (http://support.sas.com/sassamples/demos/supplychain/demos/ewrm/ewrm_index.html). The graphs and reports in the demo have not been saved, but are calculated on demand; this means that they change dynamically as the data used to calculate them change. This demo requires Internet Explorer, version 5.0 or later.

Microsoft Project Conversion Macros

MDBTOPM and MP2KTOPM are two SAS macros that convert Microsoft® Project data to a form that is readable by the PM procedure. MDBTOPM converts Microsoft Project 98 data, and MP2KTOPM converts Microsoft Project 2000 data. These two macros are wrapped into the macro MSPTOSAS. The macros generate the necessary SAS data sets, determine the values of the relevant options, and invoke an instance of the PM procedure with the converted project data. For details about the macros, see Chapter 4, “The Microsoft Project Conversion Macros.”

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Chapter 2

The CPM Procedure

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Chapter 2

The CPM Procedure

Overview

The CPM procedure can be used for planning, controlling, and monitoring a project. A typical project consists of several activities that may have precedence and time constraints. Some of these activities may already be in progress; some of them may follow different work schedules. All of the activities may compete for scarce resources. PROC CPM enables you to schedule activities subject to all of these constraints.

PROC CPM enables you to define calendars and specify holidays for the different activities so that you can schedule around holidays and vacation periods. Once a project has started, you can monitor it by specifying current information or progress data that is used by PROC CPM to compute an updated schedule. You can compare the new schedule with a baseline (or target) schedule.

For projects with scarce resources, you can determine resource-constrained schedules. PROC CPM enables you to choose from a wide variety of options so that you can control the scheduling process. Thus, you may choose to delay project completion time or use supplementary levels of resources, or alternate resources, if they are available.

All project information is contained in SAS data sets. The input data sets used by PROC CPM are as follows:

- The [Activity](#) data set contains all activity-related information such as activity name, precedence information, calendar used by the activity, progress information, baseline (or target schedule) information, resource requirements, time constraints, and any other information that you want to identify with each activity.
- The [Resource](#) data set specifies resource types, resource availabilities, resource priorities, and alternate resources.
- The [Workday](#) data set and the [Calendar](#) data set together enable you to specify any type of work pattern during a week and within each day of the week.
- The [Holiday](#) data set enables you to associate standard holidays and vacation periods with each calendar.

The output data sets are as follows:

- The [Schedule](#) data set contains the early, late, baseline, resource-constrained, and actual schedules and any other activity-related information that is calculated by PROC CPM.

- The **Resource Schedule** data set contains the schedules for each resource used by an activity.
- The **Usage** data set contains the resource usage for each of the resources used in the project.

See Chapter 3, “The PM Procedure,” for an interactive procedure that enables you to use a Graphical User Interface to enter and edit project information.

Getting Started

The basic steps necessary to schedule a project are illustrated using a simple example. Consider a software development project in which an applications developer has the software finished and ready for preliminary testing. In order to complete the project, several activities must take place. Certain activities cannot start until other activities have finished. For instance, the preliminary documentation must be written before it can be revised and edited and before the Quality Assurance department (QA) can test the software. Such constraints among the activities (namely, activity B can start after activity A has finished) are referred to as *precedence constraints*. Given the precedence constraints and estimated durations of the activities, you can use the *critical path method* to determine the shortest completion time for the project.

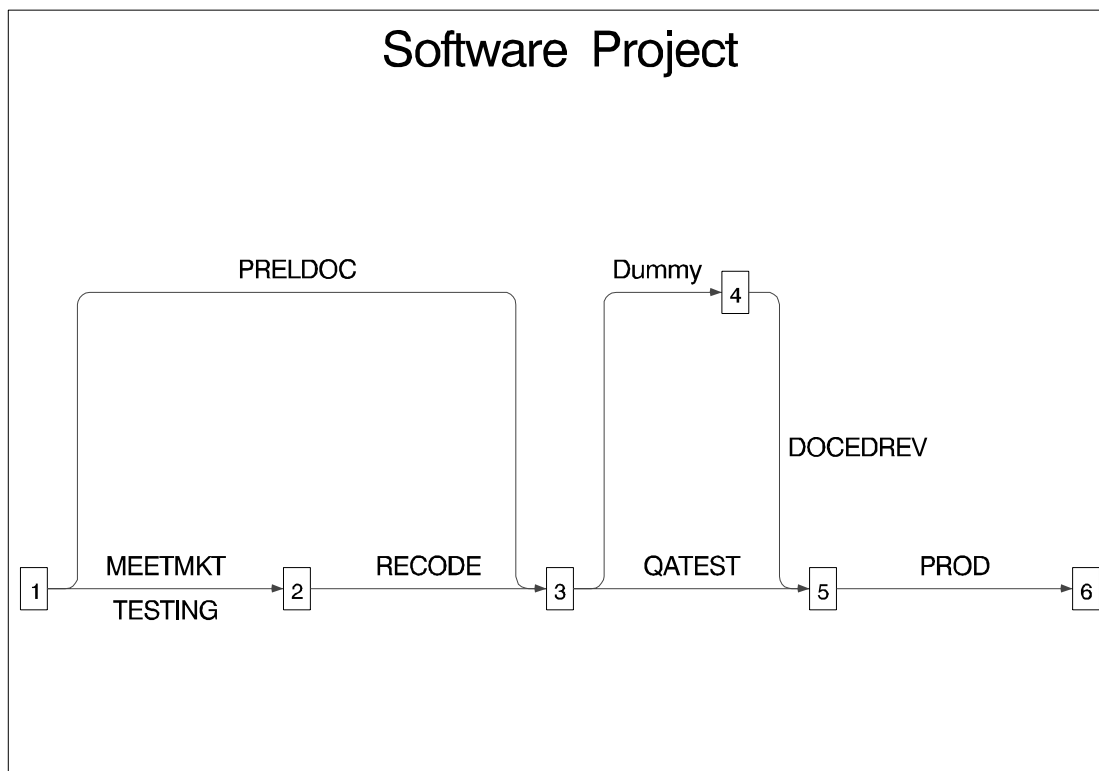


Figure 2.1. Activity-On-Arc Network

The first step in determining project completion time is to capture the relationships between the activities in a convenient representation. This is done by using a network diagram. Two types of network diagrams are popular for representing a project.

- Activity-On-Arc (AOA) or Activity-On-Edge (AOE) diagrams show the activities on the arcs or edges of the network. Figure 2.1 shows the AOA representation for the software project. This method of representing a project is known also as the arrow diagramming method (ADM). For projects represented in the AOA format, PROC CPM requires the use of the following statements:

```
PROC CPM options ;
  TAILNODE variable ;
  HEADNODE variable ;
  DURATION variable ;
```

- Activity-On-Node (AON) or Activity-On-Vertex (AOV) diagrams show the activities on nodes or vertices of the network. Figure 2.2 shows the AON representation of the project. This method is known also as the *precedence diagramming method* (PDM). The AON representation is more flexible because it enables you to specify nonstandard precedence relationships between the activities (for example, you can specify that activity B starts five days after the start of activity A). PROC CPM requires the use of the following statements to schedule projects that are represented using the AON format:

```
PROC CPM options ;
  ACTIVITY variable ;
  SUCCESSOR variables ;
  DURATION variable ;
```

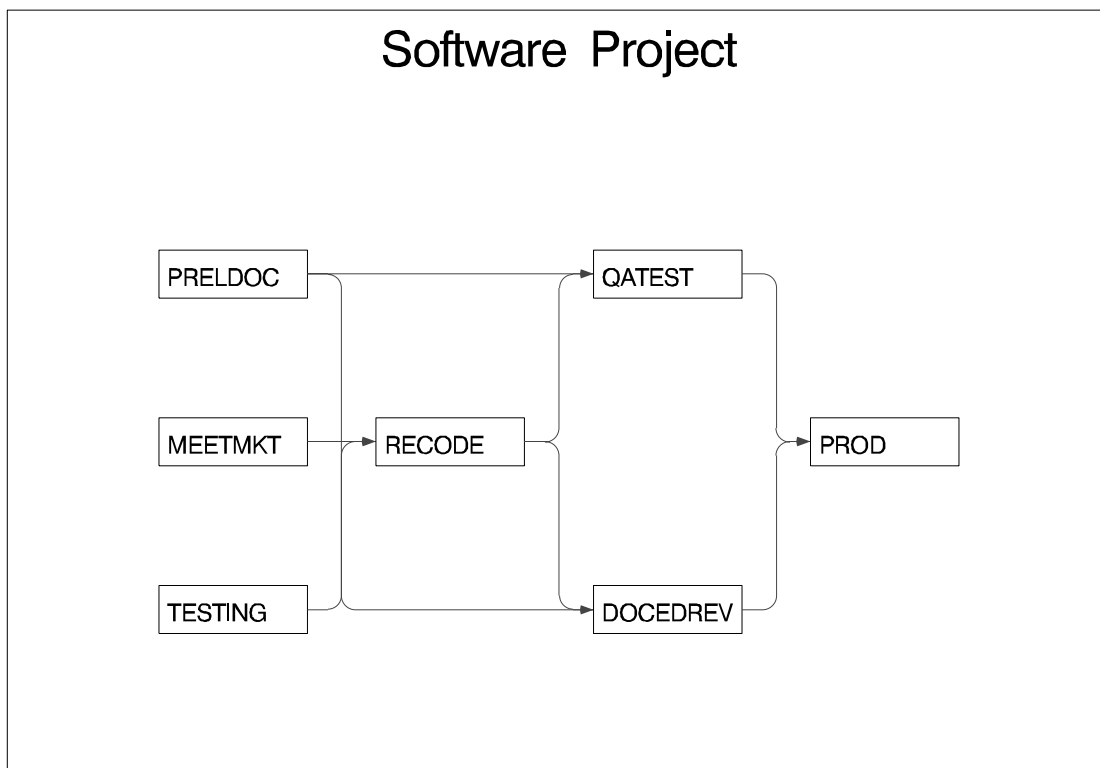


Figure 2.2. Activity-On-Node Network

The AON representation of the network is used in the remainder of this section to illustrate some of the features of PROC CPM. The project data are input to PROC CPM using a SAS data set. The basic project information is conveyed to PROC CPM through the `ACTIVITY`, `SUCCESSOR`, and `DURATION` statements. Each observation of the Activity data set specifies an activity in the project, its duration, and its immediate successors. PROC CPM enables you to specify all of the immediate successors in the same observation, or you can have multiple observations for each activity, listing each successor in a separate observation. (Multiple variables in the `SUCCESSOR` statement are used here.) PROC CPM enables you to use long activity names. In this example, shorter names are used for the activities to facilitate data entry; a variable, `Descrpt`, is used to specify a longer description for each activity.

Among other things, the procedure determines

- the minimum time in which the project can be completed
- the set of activities that is critical to the completion of the project in the minimum amount of time

No displayed output is produced. However, the results are saved in an output data set (the `Schedule` data set) that is shown in [Figure 2.3](#).

The code for the entire program is as follows.

```
data software;
  format Descrpt $20. Activity $8.
         Succesr1-Succesr2 $8. ;
  input Descrpt & Duration Activity $
         Succesr1 $ Succesr2 $ ;
  datalines;
Initial Testing          20  TESTING  RECODE      .
Prel. Documentation     15  PRELDOC  DOCEDREV    QATEST
Meet Marketing          1   MEETMKT  RECODE      .
Recoding                 5   RECODE  DOCEDREV    QATEST
QA Test Approve         10  QATEST  PROD        .
Doc. Edit and Revise    10  DOCEDREV PROD        .
Production               1   PROD    .           .
;

proc cpm data=software
  out=introl
  interval=day
  date='01mar04'd;
  id descrpt;
  activity activity;
  duration duration;
  successor succesr1 succesr2;
run;

title 'Project Schedule';
proc print data=introl;
run;
```

Project Schedule						
Obs	Activity	Succesr1	Succesr2	Duration	Descrpt	
1	TESTING	RECODE		20	Initial Testing	
2	PRELDOC	DOCEDREV	QATEST	15	Prel. Documentation	
3	MEETMKT	RECODE		1	Meet Marketing	
4	RECODE	DOCEDREV	QATEST	5	Recoding	
5	QATEST	PROD		10	QA Test Approve	
6	DOCEDREV	PROD		10	Doc. Edit and Revise	
7	PROD			1	Production	
Obs	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01MAR04	20MAR04	01MAR04	20MAR04	0	0
2	01MAR04	15MAR04	11MAR04	25MAR04	10	10
3	01MAR04	01MAR04	20MAR04	20MAR04	19	19
4	21MAR04	25MAR04	21MAR04	25MAR04	0	0
5	26MAR04	04APR04	26MAR04	04APR04	0	0
6	26MAR04	04APR04	26MAR04	04APR04	0	0
7	05APR04	05APR04	05APR04	05APR04	0	0

Figure 2.3. Software Project Plan

In addition to the variables specified in the ACTIVITY, SUCCESSOR, DURATION, and ID statements, the output data set contains the following new variables.

E_START

specifies the earliest time an activity can begin, subject to any time constraints and the completion time of the preceding activity.

E_FINISH

specifies the earliest time an activity can be finished, assuming it starts at E_START.

L_START

specifies the latest time an activity can begin so that the project is not delayed.

L_FINISH

specifies the latest time an activity can be finished without delaying the project.

T_FLOAT

specifies the amount of flexibility in the starting of a specific activity without delaying the project:

$$T_FLOAT = L_START - E_START = L_FINISH - E_FINISH$$

F_FLOAT

specifies the difference between the early finish time of the activity and the early start time of the activity's immediate successors.

In [Figure 2.3](#) the majority of the tasks have a total float value of 0. These events are *critical*; that is, any delay in these activities will cause the project to be delayed. Some of the activities have slack present, which means that they can be delayed by that amount without affecting the project completion date. For example, the activity MEETMKT has a slack period of 19 days because there are 19 days between 01MAR04 and 20MAR04.

The `INTERVAL=` option in the `PROC CPM` statement enables you to specify the durations of the activities in one of several possible units including days, weeks, months, hours, and minutes. In addition, you can schedule activities around weekends and holidays. (To skip weekends, you specify `INTERVAL=WEEKDAY`.) You can also choose different patterns of work during a day or a week (for example, holidays on Friday and Saturday) and different sets of holidays for the different activities in the project. A *calendar* consists of a set of work schedules for a typical week and a set of holidays. `PROC CPM` enables you to define any number of calendars and associate different activities with different calendars.

In the previous example, you saw that you could schedule your project by choosing a project start date. You can also specify a project finish date if you have a deadline to be met and you need to determine the latest start times for the different activities in the project. You can set constraints on start or finish dates for specific activities within a given project as well. For example, testing the software may have to be delayed until the testing group finishes another project that has a higher priority. `PROC CPM` can schedule the project subject to such restrictions through the use of the `ALIGNDATE` and `ALIGNTYPE` statements. See [Example 2.12](#) for more information on the use of the `ALIGNDATE` and `ALIGNTYPE` statements.

For a project that is already in progress, you can incorporate the *actual* schedule of the activities (some activities may already be completed while others may still be in progress) to obtain a progress update. You can save the original schedule as a *baseline* schedule and use it to compare against the current schedule to determine if any of the activities have taken longer than anticipated.

Quite often the resources needed to perform the activities in a project are available only in limited quantities and may cause certain activities to be postponed due to unavailability of the required resources. You can use `PROC CPM` to schedule the activities in a project subject to resource constraints. A wide range of options enables you to control the scheduling process. For example, you can specify resource or activity priorities, set constraints on the maximum amount of delay that can be tolerated for a given activity, enable activities to be preempted, specify alternate resources that can be used instead of scarce resources, or indicate secondary levels of resources that can be used when the primary levels are insufficient.

When an activity requires multiple resources, it is possible that each resource may follow a different calendar and each may require varying amounts of work. `PROC CPM` enables you to define resource-driven durations for the activities. You can also specify calendars for the resources. In either of these situations it is possible that each resource used by an activity may have its own individual schedule. `PROC CPM` enables you to save the resource schedules for the different activities in a Resource Schedule data set, the `RESOURCESCHED=` data set.

In addition to obtaining a resource-constrained schedule in an output data set, you can save the resource utilization summary in another output data set, the `RESOURCEOUT=` data set. Several options enable you to control the amount of information saved in this data set.

The CPM procedure enables you to define activities in a multiproject environment

with multiple levels of nesting. You can specify a PROJECT variable that identifies the name or number of the project to which each activity belongs.

All the options available with the CPM procedure are discussed in detail in the following sections. Several examples illustrate most of the features.

Syntax

The following statements are used in PROC CPM:

```

PROC CPM options ;
  ACTIVITY variable ;
  ACTUAL / actual options ;
  ALIGNDATE variable ;
  ALIGNTYPE variable ;
  BASELINE / baseline options ;
  CALID variable ;
  DURATION / duration options ;
  HEADNODE variable ;
  HOLIDAY variable / holiday options ;
  ID variables ;
  PROJECT variable / project options ;
  RESOURCE variables / resource options ;
  SUCCESSOR variables / lag options ;
  TAILNODE variable ;

```

Functional Summary

The following tables outline the options available for the CPM procedure classified by function.

Table 2.1. Activity Splitting Specifications

Description	Statement	Option
split in-progress activities at TIMENOW	ACTUAL	TIMENOWSPLT
max. number of segments <i>variable</i>	RESOURCE	MAXNSEGMT=
min. segment duration <i>variable</i>	RESOURCE	MINSEGMTDUR=
enable splitting	RESOURCE	SPLITFLAG

Table 2.2. Baseline or Target Schedule Specifications

Description	Statement	Option
baseline finish date <i>variable</i>	BASELINE	B_FINISH=
baseline start date <i>variable</i>	BASELINE	B_START=
schedule to compare with baseline	BASELINE	COMPARE=
schedule to use as baseline	BASELINE	SET=
schedule to update baseline	BASELINE	UPDATE=

Table 2.3. Calendar Specifications

Description	Statement	Option
calendar <i>variable</i>	CALID	
holiday <i>variable</i>	HOLIDAY	
holiday duration <i>variable</i>	HOLIDAY	HOLIDUR=
holiday finish <i>variable</i>	HOLIDAY	HOLIFIN=

Table 2.4. Data Set Specifications

Description	Statement	Option
calendar input data set	PROC CPM	CALEDATA=
activity input data set	PROC CPM	DATA=
holiday input data set	PROC CPM	HOLIDATA=
schedule output data set	PROC CPM	OUT=
resource availability input data set	PROC CPM	RESOURCEIN=
resource schedule output data set	PROC CPM	RESOURCESCHED=
resource usage output data set	PROC CPM	RESOURCEOUT=
workday input data set	PROC CPM	WORKDATA=

Table 2.5. Duration Control Specifications

Description	Statement	Option
workday length	PROC CPM	DAYLENGTH=
workday start	PROC CPM	DAYSTART=
duration unit	PROC CPM	INTERVAL=
duration multiplier	PROC CPM	INTPER=
treatment of milestone	PROC CPM	SETFINISHMILESTONE
duration <i>variable</i>	DURATION	
finish <i>variable</i>	DURATION	FINISH=
override specified duration	DURATION	OVERRIDEDUR
start <i>variable</i>	DURATION	START=
work <i>variable</i>	RESOURCE	WORK=

Table 2.6. Lag Specifications

Description	Statement	Option
alphanumeric lag duration calendar	SUCCESSOR	ALAGCAL=
lag <i>variables</i>	SUCCESSOR	LAG=
numeric lag duration calendar	SUCCESSOR	NLAGCAL=

Table 2.7. Miscellaneous Options

Description	Statement	Option
suppress warning messages	PROC CPM	SUPPRESSOBWARN
fix L_FINISH for finish tasks to E_FINISH	PROC CPM	FIXFINISH

Table 2.8. Network Specifications

Description	Statement	Option
AON format activity <i>variable</i>	ACTIVITY	
AOA format headnode <i>variable</i>	HEADNODE	
project <i>variable</i>	PROJECT	
AON format successor <i>variables</i>	SUCCESSOR	
AOA format tailnode <i>variable</i>	TAILNODE	

Table 2.9. Multiproject Specifications

Description	Statement	Option
project <i>variable</i>	PROJECT	
aggregate parent resources	PROJECT	AGGREGATEPARENTRES
ignore parent resources	PROJECT	IGNOREPARENTRES
compute separate critical paths	PROJECT	SEPSCRIT
use specified project duration	PROJECT	USEPROJDUR
compute WBS Code	PROJECT	WBSCODE

Table 2.10. OUT= Data Set Options

Description	Statement	Option
include percent complete variable	ACTUAL	ESTIMATEPCTC
add an observation for missing activities	PROC CPM	ADDACT
single observation per activity	PROC CPM	COLLAPSE
copy relevant variables to Schedule data set	PROC CPM	XFERVARS
<i>variables</i> to be copied to Schedule data set	ID	
include descending sort variables	PROJECT	DESCENDING
include all sort order variables	PROJECT	ORDERALL
include early start sort order variable	PROJECT	ESORDER
include late start sort order variable	PROJECT	LSORDER
include resource start order variable	PROJECT	SSORDER
include WBS Code	PROJECT	WBSCODE
include information about resource delays	RESOURCE	DELAYANALYSIS
include early start schedule	RESOURCE	E_START
include free float	RESOURCE	F_FLOAT
set unscheduled S_START and S_FINISH	RESOURCE	FILLUNSCHEDED
include late start schedule	RESOURCE	L_START
exclude early start schedule	RESOURCE	NOE_START
exclude free float	RESOURCE	NOF_FLOAT
exclude late start schedule	RESOURCE	NOL_START
exclude resource variables	RESOURCE	NORESOURCEVARS
exclude total float	RESOURCE	NOT_FLOAT
include resource variables	RESOURCE	RESOURCEVARS
include total float	RESOURCE	T_FLOAT
set unscheduled S_START and S_FINISH to missing	RESOURCE	UNSCHEDEDMISS
update unscheduled S_START, S_FINISH	RESOURCE	UPDTUNSCHEDED

Table 2.11. Problem Size Options

Description	Statement	Option
number of precedence constraints	PROC CPM	NADJ=
number of activities	PROC CPM	NACTS=
number of distinct node or activity names	PROC CPM	NNODES=
number of resource requirements	PROC CPM	NRESREQ=
do not use utility data set	PROC CPM	NOUTIL

Table 2.12. Progress Updating Options

Description	Statement	Option
actual finish <i>variable</i>	ACTUAL	A_FINISH=
actual start <i>variable</i>	ACTUAL	A_START=
assume automatic completion	ACTUAL	AUTOUPDT
enable actual time to fall in a non-work period	ACTUAL	FIXASTART
do not assume automatic completion	ACTUAL	NOAUTOUPDT
percentage complete <i>variable</i>	ACTUAL	PCTCOMP=
remaining duration <i>variable</i>	ACTUAL	REMDUR=
show float for all activities	ACTUAL	SHOWFLOAT
current date	ACTUAL	TIMENOW=

Table 2.13. Resource Variable Specifications

Description	Statement	Option
resource <i>variables</i>	RESOURCE	
observation type <i>variable</i>	RESOURCE	OBSTYPE=
resource availability date/time <i>variable</i>	RESOURCE	PERIOD=
alternate resource specification <i>variable</i>	RESOURCE	RESID=
work <i>variable</i>	RESOURCE	WORK=

Table 2.14. Resource Allocation Control Options

Description	Statement	Option
delay <i>variable</i>	RESOURCE	ACTDELAY=
activity priority <i>variable</i>	RESOURCE	ACTIVITYPRTY=
use alternate resources before supplementary levels	RESOURCE	ALTBEFORESUP
wait until L_START + DELAY	RESOURCE	AWAITDELAY
delay specification	RESOURCE	DELAY=
schedule even if insufficient resources	RESOURCE	INFEASDIAGNOSTIC
independent allocation	RESOURCE	INDEPENDENTALLOC
milestones can consume resources	RESOURCE	MILESTONERESOURCE
milestones can not consume resources	RESOURCE	MILESTONENORESOURCE
use multiple alternates for a single resource	RESOURCE	MULTIPLEALTERNATES
resource calendar intersect	RESOURCE	RESCALINTERSECT
scheduling priority rule	RESOURCE	SCHEDRULE=
secondary scheduling priority rule	RESOURCE	SCHEDRULE2=

stop date for resource constrained scheduling	RESOURCE	STOPDATE=
---	----------	-----------

Table 2.15. RESOURCEOUT= Data Set Options

Description	Statement	Option
include all types of resource usage	RESOURCE	ALL
append observations for total usage	RESOURCE	APPEND
alphanumeric calendar for <i>_TIME_</i>	RESOURCE	AROUTCAL=
include availability profile for each resource	RESOURCE	AVPROFILE
cumulative usage for consumable resources	RESOURCE	CUMUSAGE
include early start profile for each resource	RESOURCE	ESPROFILE
exclude unscheduled activities in profile	RESOURCE	EXCLUNSCHED
include unscheduled activities in profile	RESOURCE	INCLUNSCHED
save observations for total usage	RESOURCE	TOTUSAGE
include late start profile for each resource	RESOURCE	LSPROFILE
maximum value of <i>_TIME_</i>	RESOURCE	MAXDATE=
maximum number of observations	RESOURCE	MAXOBS=
minimum value of <i>_TIME_</i>	RESOURCE	MINDATE=
numeric calendar for <i>_TIME_</i>	RESOURCE	NROUTCAL=
include resource constrained profile	RESOURCE	RCPROFILE
unit of difference between consecutive <i>_TIME_</i> values	RESOURCE	ROUTINTERVAL=
difference between consecutive <i>_TIME_</i> values	RESOURCE	ROUTINTPER=
use a continuous calendar for <i>_TIME_</i>	RESOURCE	ROUTNOBREAK

Table 2.16. RESOURCESCHEM= Data Set Options

Description	Statement	Option
add activity or resource calendar	RESOURCE	ADDCAL
include WBS Code	PROJECT	RSCHEDWBS
include order variables	PROJECT	RSCHEDORDER
<i>id variables</i>	RESOURCE	RSCHEDID=

Table 2.17. Time Constraint Specifications

Description	Statement	Option
alignment date <i>variable</i>	ALIGNDATE	
alignment type <i>variable</i>	ALIGNTYPE	
project start date	PROC CPM	DATE=
project finish date	PROC CPM	FBDATE=
finish before DATE= value	PROC CPM	FINISHBEFORE

PROC CPM Statement

PROC CPM *options* ;

The following options can appear in the PROC CPM statement.

ADDACT

ADDALLACT

EXPAND

indicates that an observation is to be added to the Schedule output data set (and the Resource Schedule output data set) for each activity that appears as a value of the variables specified in the SUCCESSOR or PROJECT statements without appearing as a value of the variable specified in the ACTIVITY statement. If the PROJECT statement is used, and the activities do not have a single common parent, an observation is also added to the Schedule data set containing information for a single common parent defined by the procedure.

CALEDATA=SAS-data-set

CALENDAR=SAS-data-set

identifies a SAS data set that specifies the work pattern during a standard week for each of the calendars that are to be used in the project. Each observation of this data set (also referred to as the **Calendar** data set) contains the name or the number of the calendar being defined in that observation, the names of the shifts or work patterns used each day, and, optionally, a standard workday length in hours. For details on the structure of this data set, see the “Multiple Calendars” section on page 98. The work shifts referred to in the Calendar data set are defined in the Workday data set. The calendars defined in the Calendar data set can be identified with different activities in the project.

COLLAPSE

creates only one observation per activity in the output data set when the input data set for a network in AON format contains multiple observations for the same activity. Note that this option is allowed only if the network is in AON format.

Often, the input data set may have more than one observation per activity (especially if the activity has several successors). If you are interested only in the schedule information about the activity, there is no need for multiple observations in the output data set for this activity. Use the COLLAPSE option in this case.

DATA=SAS-data-set

names the SAS data set that contains the network specification and activity information. If the DATA= option is omitted, the most recently created SAS data set is used. This data set (also referred to in this chapter as the **Activity** data set) contains all of the information that is associated with each activity in the network.

DATE=date

specifies the SAS date, time, or datetime that is to be used as an alignment date for the project. If neither the FINISHBEFORE option nor any other alignment options are specified, then the CPM procedure schedules the project to start on *date*. If *date* is a SAS time value, the value of the INTERVAL= parameter should be HOUR, MINUTE, or SECOND; if it is a SAS date value, *interval* should be DAY, WEEKDAY,

WORKDAY, WEEK, MONTH, QTR, or YEAR; and if it is a SAS datetime value, *interval* should be DTWRKDAY, DTDAY, DTHOUR, DTMINUTE, DTSECOND, DTWEEK, DTMONTH, DTQTR, or DTYEAR.

DAYLENGTH=*daylength*

specifies the length of the workday. On each day, work is scheduled starting at the beginning of the day as specified in the DAYSTART= option and ending *daylength* hours later. The DAYLENGTH= value should be a SAS time value. The default value of *daylength* is 24 if the INTERVAL= option is specified as DTDAY, DTHOUR, DTMINUTE, or DTSECOND, and the default value of *daylength* is 8 if the INTERVAL= option is specified as WORKDAY or DTWRKDAY. If INTERVAL=DAY or WEEKDAY and the value of *daylength* is less than 24, then the schedule produced is in SAS datetime values. For other values of the INTERVAL= option, the DAYLENGTH= option is ignored.

DAYSTART=*daystart*

specifies the start of the workday. The DAYSTART= value should be a SAS time value. This parameter should be specified only when *interval* is one of the following: DTDAY, WORKDAY, DTWRKDAY, DTHOUR, DTMINUTE, or DTSECOND; in other words, this parameter should be specified only if the schedule produced by the CPM procedure is in SAS datetime values. The default value of *daystart* is 9 a.m. if INTERVAL is WORKDAY; otherwise, the value of *daystart* is equal to the time part of the SAS datetime value specified for the DATE= option.

FBDATE=*fbdate*

specifies a finish-before date that can be specified in addition to the DATE= option. If the FBDATE= option is not given but the FINISHBEFORE option is specified, then *fbdate* = *date*. Otherwise, *fbdate* is equal to the project completion date. If *fbdate* is given in addition to the DATE= and FINISHBEFORE options, then the minimum of the two dates is used as the required project completion date. See the “[Scheduling Subject to Precedence Constraints](#)” section on page 88 for details on how the procedure uses the *date* and *fbdate* to compute the early and late start schedules.

FINISHBEFORE

specifies that the project be scheduled to complete before the date given in the DATE= option.

FIXFINISH

specifies that all **finish** tasks are to be constrained by their respective early finish times. In other words, the late finish times of all finish tasks do not float to the project completion time.

HOLIDATA=*SAS-data-set*

HOLIDAY=*SAS-data-set*

identifies a SAS data set that specifies holidays. These holidays can be associated with specific calendars that are also identified in the HOLIDATA= data set (also referred to as the **Holiday** data set). The HOLIDATA= option must be used with a **HOLIDAY** statement that specifies the variable in the SAS data set that contains the start time of holidays. Optionally, the data set can include a variable that specifies the length of each holiday or a variable that identifies the finish time of each holiday (if

the holidays are longer than one day). For projects involving multiple calendars, this data set can also include the variable specified by the **CALID** statement that identifies the calendar to be associated with each holiday. See the “Multiple Calendars” section on page 98 for further information regarding holidays and multiple calendars.

INTERVAL=*interval*

requests that each unit of duration be measured in *interval* units. Possible values for *interval* are DAY, WEEK, WEEKDAY, WORKDAY, MONTH, QTR, YEAR, HOUR, MINUTE, SECOND, DTDAY, DTWRKDAY, DTWEEK, DTMONTH, DTQTR, DTYEAR, DTHOUR, DTMINUTE, and DTSECOND. The default value is based on the format of the DATE= parameter. See the “Using the INTERVAL= Option” section on page 90 for further information regarding this option.

INTPER=*period*

requests that each unit of duration be equivalent to *period* units of duration. The default value is 1.

NACTS=*nacts*

specifies the number of activities for which memory is allocated in core by the procedure. If the number of activities exceeds *nacts*, the procedure uses a utility data set for storing the activity array. The default value for *nacts* is set to *nobs*, if the network is specified in AOA format, and to $nobs \times (nsucc + 1)$, if the network is specified in AON format, where *nobs* is the number of observations in the Activity data set and *nsucc* is the number of variables specified in the SUCCESSOR statement.

NADJ=*nadj*

specifies the number of precedence constraints (adjacencies) in the project network. If the number of adjacencies exceeds *nadj*, the procedure uses a utility data set for storing the adjacency array. The default value of *nadj* is set to *nacts* if the network is in AON format, and it is set to $nacts \times 2$ if the network is in AOA format.

NNODES=*nnodes*

specifies the size of the symbolic table used to look up the activity names (node names) for the network specification in AON (AOA) format. If the number of distinct names exceeds *nnodes*, the procedure uses a utility data set for storing the tree used for the table lookup. The default value for *nnodes* is set to $nobs \times 2$ if the network is specified in AOA format and to $nobs \times (nsucc + 1)$ if the network is specified in AON format, where *nobs* is the number of observations in the Activity data set and *nsucc* is the number of variables specified in the SUCCESSOR statement.

NOUTIL

specifies that the procedure should not use utility data sets for memory management. By default, the procedure resorts to the use of utility data sets and swaps between core memory and utility data sets as necessary if the number of activities or precedence constraints or resource requirements in the input data sets is larger than the number of each such entity for which memory is initially allocated in core. Specifying this option causes the procedure to increase the memory allocation instead of using a utility data set; if the problem is too large to fit in core memory, PROC CPM will stop with an error message.

NRESREQ=*nres*

specifies the number of distinct resource requirements corresponding to all activities and resources in the project. The default value of *nres* is set to $nobs \times nresvar \times 0.25$, where *nobs* is the number of observations in the Activity data set, and *nresvar* is the number of RESOURCE variables in the Activity data set.

OUT=*SAS-data-set*

specifies a name for the output data set that contains the schedule determined by PROC CPM. This data set (also referred to as the **Schedule** data set) contains all of the variables that were specified in the Activity data set to define the project. Every observation in the Activity data set has a corresponding observation in this output data set. If PROC CPM is used to determine a schedule that is not subject to any resource constraints, then this output data set contains the early and late start schedules; otherwise, it also contains the resource-constrained schedule. See the “[OUT= Schedule Data Set](#)” section on page 95 for information about the names of the new variables in the data set. If the OUT= option is omitted, the SAS system creates a data set and names it according to the DATA*n* naming convention.

RESOURCEIN=*SAS-data-set***RESIN=***SAS-data-set***RIN=***SAS-data-set***RESLEVEL=***SAS-data-set*

names the SAS data set that contains the levels available for the different resources used by the activities in the project. This data set also contains information about the type of resource (replenishable or consumable), the calendar associated with each resource, the priority for each resource, and lists, for each resource, all the alternate resources that can be used as a substitute. In addition, this data set indicates whether or not the resource rate affects the duration. The specification of the RESIN= data set (also referred to as the **Resource** data set) indicates to PROC CPM that the schedule of the project is to be determined subject to resource constraints. For further information about the format of this data set, see the “[RESOURCEIN= Input Data Set](#)” section on page 109.

If this option is specified, you must also use the RESOURCE statement to identify the variable names for the resources to be used for resource-constrained scheduling. In addition, you must specify the name of the variable in this data set (using the PERIOD= option in the RESOURCE statement) that contains the dates from which the resource availabilities in each observation are valid. Furthermore, the data set must be sorted in order of increasing values of this period variable.

RESOURCEOUT=*SAS-data-set***RESOUT=***SAS-data-set***ROUT=***SAS-data-set***RESUSAGE=***SAS-data-set*

names the SAS data set in which you can save resource usage profiles for each of the resources specified in the [RESOURCE](#) statement. This data set is also referred to as the **Usage** data set. In the Usage data set, you can save the resource usage by time period for the early start, late start, and resource-constrained schedules, and the surplus level of resources remaining after resource allocation is performed.

By default, it provides the usage profiles for the early and late start schedules if resource allocation is not performed. If resource allocation is performed, this data set also provides usage profiles for the resource-constrained schedule and a profile of the level of remaining resources.

You can control the types of profiles to be saved by using the `ESPROFILE` (early start usage), `LSPROFILE` (late start usage), `RCPROFILE` (resource-constrained usage), or `AVPROFILE` (resource availability after resource allocation) options in the `RESOURCE` statement. You can specify any combination of these four options. You can also specify the `ALL` option to indicate that all four options (`ESPROFILE`, `LSPROFILE`, `RCPROFILE`, `AVPROFILE`) are to be in effect. For details about variable names and the interpretation of the values in this data set, see the section “`RESOURCEOUT= Usage Data Set`” on page 124.

RESOURCESCHED=SAS-data-set

RESSCHED=SAS-data-set

RSCHEDULE=SAS-data-set

RSCHED=SAS-data-set

names the SAS data set in which you can save the schedules for each resource used by any activity. This option is valid whenever the `RESOURCE` statement is used to specify any resource requirements. The resulting data set is especially useful when resource-driven durations or resource calendars cause the resources used by an activity to have different schedules.

SETFINISHMILESTONE

specifies that milestones (zero duration activities) should have the same start and finish times as the finish time of their predecessor. In other words, this option enables milestones that mark the *end* of the preceding activity to coincide with its finish time. By default, if a milestone `M` is a successor to an activity that finishes at the end of the day (say 15Mar2004), the start and finish times for the milestone are specified as the beginning of the next day (16Mar2004). This corresponds to the definition of start times in the CPM procedure: *all* start times indicate the *beginning* of the date specified. For zero duration activities, the finish time is defined to be the same as the start time. The `SETFINISHMILESTONE` option specifies that the start and finish times for the milestone `M` should be specified as 15Mar2004, with the interpretation that the milestone’s schedule corresponds to the *end* of the day. There may be exceptions to this definition if there are special alignment constraints on the milestone. For details, see the “[Finish Milestones](#)” section on page 94.

SUPPRESSOBWARN

turns off the display of warnings and notes for every observation with invalid or missing specifications.

WORKDATA=SAS-data-set

WORKDAY=SAS-data-set

identifies a SAS data set that defines the work pattern during a standard working day. Each numeric variable in this data set (also referred to as the **Workday** data set) is assumed to denote a unique shift pattern during one working day. The variables must

be formatted as SAS time values and the observations are assumed to specify, alternately, the times when consecutive shifts start and end. See the “[Multiple Calendars](#)” section on page 98 for a description of this data set.

XFERVARS

indicates that all relevant variables are to be copied from the Activity data set to the Schedule data set. This includes all variables used in the [ACTUAL](#) statement, the [ALIGNDATE](#) and [ALIGNTYPE](#) statements, the [SUCCESSOR](#) statement, and the [RESOURCE](#) statement.

ACTIVITY Statement

ACTIVITY *variable*;

ACT *variable*;

The **ACTIVITY** statement is required when data are input in an AON format; this statement identifies the variable that contains the names of the nodes in the network. The activity associated with each node has a duration equal to the value of the **DURATION** variable. The **ACTIVITY** variable can be character or numeric because it is treated symbolically. Each node in the network must be uniquely defined.

The **ACTIVITY** statement is also supported in the Activity-on-Arc format. The **ACTIVITY** variable is used to uniquely identify the activity specified between two nodes of the network. In the AOA format, if the **ACTIVITY** statement is not specified, each observation in the Activity data set is treated as a new activity.

ACTUAL Statement

ACTUAL / *options* ;

The **ACTUAL** statement identifies variables in the Activity data set that contain progress information about the activities in the project. For a project that is already in progress, you can describe the actual status of any activity by specifying the activity’s actual start, actual finish, remaining duration, or percent of work completed. At least one of the four variables (**A_START**, **A_FINISH**, **REMDUR**, **PCTCOMP**) needs to be specified in the **ACTUAL** statement. These variables are referred to as *progress variables*. The **TIMENOW=** option in this statement represents the value of the current time (referred to as **TIMENOW**), and it is used in conjunction with the values of the progress variables to check for consistency and to determine default values if necessary.

You can also specify options in the **ACTUAL** statement that control the updating of the project schedule. Using the **ACTUAL** statement causes four new variables (**A_START**, **A_FINISH**, **A_DUR**, and **STATUS**) to be added to the Schedule data set; these variables are defined in the “[OUT= Schedule Data Set](#)” section on page 95. See the “[Progress Updating](#)” section on page 105 for more information.

The following options can be specified in the **ACTUAL** statement after a slash (/).

A_FINISH=*variable*

AF=*variable*

identifies a variable in the Activity data set that specifies the actual finish times of

activities that are already completed. The actual finish time of an activity must be less than TIMENOW.

A_START=variable

AS=variable

identifies a variable in the Activity data set that specifies the actual start times of activities that are in progress or that are already completed. Note that the actual start time of an activity must be less than TIMENOW.

AUTOUPDT

requests that PROC CPM should assume automatic completion (or start) of activities that are predecessors to activities already completed (or in progress). For example, if activity B is a successor of activity A, and B has an actual start time (or actual finish time or both) specified, while A has missing values for both actual start and actual finish times, then the AUTOUPDT option causes PROC CPM to assume that A must have already finished. PROC CPM then assigns activity A an actual start time and an actual finish time consistent with the precedence constraints. The AUTOUPDT option is the default.

ESTIMATEPCTC

ESTPCTC

ESTPCTCOMP

ESTPROG

indicates that a variable named PCT_COMP is to be added to the Schedule output data set (and the Resource Schedule output data set) that contains the percent completion time for each activity (for each resource used by each activity) in the project. Note that this value is 0 for activities that have not yet started and 100 for completed activities; for activities in progress, this value is computed using the actual start time, the value of TIMENOW, and the revised duration of the activity.

FIXASTART

specifies that the actual start time of an activity should not be overwritten if it is specified to be on a non-work day. By default, none of the start or finish times of an activity can occur during a non-work period corresponding to the activity's calendar. If the actual start time is specified on a non-work day, it is moved to the nearest work day. The FIXASTART option specifies that the actual start and finish times be left unchanged even if they coincide with a non-working time. Thus, if the actual start time is specified to be sometime on Sunday, it is left unchanged even if Sunday is a non-working day in the activity's calendar.

NOAUTOUPDT

requests that PROC CPM should not assume automatic completion of activities. (The NOAUTOUPDT option is the reverse of the AUTOUPDT option.) In other words, only those activities that have nonmissing actual start or nonmissing actual finish times or both (either specified as values for the A_START and A_FINISH variables or computed on the basis of the REMDUR or PCTCOMP variables and TIMENOW) are assumed to have started; all other activities have an implicit start time that is greater than or equal to TIMENOW. This option requires you to enter the progress information for all the activities that have started or are complete; an activity is assumed to be *pending* until one of the progress variables indicates that it has started.

PCTCOMP=*variable*

PCTCOMPLETE=*variable*

PCOMP=*variable*

identifies a variable in the Activity data set that specifies the percentage of the work that has been completed for the current activity. The values for this variable must be between 0 and 100. A value of 0 for this variable means that the current activity has not yet started. A value of 100 means that the activity is already complete. Once again, the value of the TIMENOW= option is used as a reference point to resolve the values specified for the PCTCOMP variable. See the “[Progress Updating](#)” section on page 105 for more information.

REMDUR=*variable*

RDURATION=*variable*

RDUR=*variable*

identifies a variable in the Activity data set that specifies the remaining duration of activities that are in progress. The values of this variable must be nonnegative: a value of 0 for this variable means that the activity in that observation is completed, while a value greater than 0 means that the activity is not yet complete (the remaining duration is used to revise the estimate of the original duration). The value of the TIMENOW parameter is used to determine an actual start time or an actual finish time or both for activities based on the value of the remaining duration. See the “[Progress Updating](#)” section on page 105 for further information.

SHOWFLOAT

This option in the **ACTUAL** statement indicates that PROC CPM should allow activities that are completed or in progress to have nonzero float. By default, all activities that are completed or in progress have the late start schedule set to be equal to the early start schedule and thus have both total float and free float equal to 0. If the SHOWFLOAT option is specified, the late start schedule is computed for in-progress and completed activities using the precedence and time constraints during the backward pass.

TIMENOW=*timenow*

CURRDATE=*timenow*

specifies the SAS date, time, or datetime value that is used as a reference point to resolve the values of the remaining duration and percent completion times when the **ACTUAL** statement is used. It can be thought of as the instant at the *beginning of the specified date*, when a *snapshot* of the project is taken; the actual start times or finish times or both are specified for all activities that have started or have been completed by the *end of the previous day*. If an **ACTUAL** statement is used without specification of the TIMENOW= option, the default value is set to be the time period following the maximum of all the actual start and finish times that have been specified; if there are no actual start or finish times, then TIMENOW is set to be equal to the current date. See the “[Progress Updating](#)” section on page 105 for further information regarding the TIMENOW= option and the **ACTUAL** statement.

TIMENOWSPLT

indicates that activities that are in progress at TIMENOW can be split at TIMENOW if they cause resource infeasibilities. During resource allocation, any activities with

values of `E_START` less than `TIMENOW` are scheduled even if there are not enough resources (a warning message is printed to the log if this is the case). This is true even for activities that are in progress. The `TIMENOWSPLT` option permits an activity to be split into two segments at `TIMENOW`, allowing the second segment of the activity to be scheduled later when resource levels permit. See the “[Activity Splitting](#)” section on page 118 for information regarding activity segments. Note that activities with an alignment type of `MS` or `MF` are not allowed to be split; also, activities without resource requirements will not be split.

ALIGNDATE Statement

ALIGNDATE *variable* ;
DATE *variable* ;
ADATE *variable* ;

The `ALIGNDATE` statement identifies the variable in the Activity data set that specifies the dates to be used to constrain each activity to start or finish on a particular date. The `ALIGNDATE` statement is used in conjunction with the `ALIGNTYPE` statement, which specifies the type of alignment. A missing value for the variables specified in the `ALIGNDATE` statement indicates that the particular activity has no restriction imposed on it.

`PROC CPM` requires that if the `ALIGNDATE` statement is used, then all start activities (activities with no predecessors) have nonmissing values for the `ALIGNDATE` variable. If any start activity has a missing `ALIGNDATE` value, it is assumed to start on the date specified in the `PROC CPM` statement (if such a date is given) or, if no date is given, on the earliest specified start date of all start activities. If none of the start activities has a start date specified and a project start date is not specified in the `PROC CPM` statement, the procedure stops execution and returns an error message. See the “[Time-Constrained Scheduling](#)” section on page 92 for information on how the variables specified in the `ALIGNDATE` and `ALIGNTYPE` statements affect the schedule of the project.

ALIGNTYPE Statement

ALIGNTYPE *variable* ;
ALIGN *variable* ;
ATYPE *variable* ;

The `ALIGNTYPE` statement is used to specify whether the date value in the `ALIGNDATE` statement is the earliest start date, the latest finish date, and so forth, for the activity in the observation. The values allowed for the variable specified in the `ALIGNTYPE` statement are specified in [Table 2.18](#).

Table 2.18. Valid Values for the ALIGNTYPE Variable

Value	Type of Alignment
SEQ	Start equal to
SGE	Start greater than or equal to
SLE	Start less than or equal to
FEQ	Finish equal to
FGE	Finish greater than or equal to
FLE	Finish less than or equal to
MS	Mandatory start equal to
MF	Mandatory finish equal to

If an **ALIGNDATE** statement is specified without an **ALIGNTYPE** statement, all of the activities are assumed to have an aligntype of **SGE**. If an activity has a nonmissing value for the **ALIGNDATE** variable and a missing value for the **ALIGNTYPE** variable, then the aligntype is assumed to be **SGE**. See the “**Time-Constrained Scheduling**” section on page 92 for information on how the **ALIGNDATE** and **ALIGNTYPE** variables affect project scheduling.

BASELINE Statement

BASELINE / options ;

The **BASELINE** statement enables you to save a specific schedule as a *baseline* or *target* schedule and compare another schedule, such as an updated schedule or resource constrained schedule, against it. The schedule that is to be saved as a baseline can be specified either by explicitly identifying two numeric variables in the input data set as the **B_START** and **B_FINISH** variables, or by indicating the particular schedule (**EARLY**, **LATE**, **ACTUAL**, or **RESOURCE** constrained schedule) that is to be used to set the **B_START** and **B_FINISH** variables. The second method of setting the schedule is useful when you want to set the baseline schedule on the basis of the *current invocation* of **PROC CPM**.

Note that the **BASELINE** statement needs to be specified in order for the baseline start and finish times to be copied to the Schedule data set. Just including the **B_START** and **B_FINISH** variables in the Activity data set does not initiate baseline processing.

The following options can be specified in the **BASELINE** statement after a slash (/).

B_FINISH=variable

BF=variable

specifies the numeric-valued variable in the Activity data set that sets **B_FINISH**.

B_START=variable

BS=variable

specifies the numeric-valued variable in the Activity data set that sets **B_START**.

COMPARE=schedule

compares a specific schedule (**EARLY**, **LATE**, **RESOURCE** or **ACTUAL**) in the Activity data set with the baseline schedule. The **COMPARE** option is valid only

if the input data set already has a B_START and a B_FINISH variable or if the SET= option is also specified. In other words, the COMPARE option is valid only if there is a baseline schedule to compare with. The comparison is specified in two variables in the Schedule data set, S_VAR and F_VAR, which have the following definition:

```
S_VAR = Compare Start - B_START;
F_VAR = Compare Finish - B_FINISH;
```

where **Compare Start** and **Compare Finish** refer to the start and finish times corresponding to the schedule that is used as a comparison.

Note that the values of the variables S_VAR and F_VAR are calculated in units of the INTERVAL= parameter, taking into account the calendar defined for the activity.

SET=schedule

specifies which of the four schedules (EARLY, LATE, RESOURCE, or ACTUAL) to set the baseline schedule equal to. The SET= option causes the addition of two new variables in the Schedule data set; these are the B_START and B_FINISH variables. The procedure sets B_START and B_FINISH equal to the start and finish times corresponding to the EARLY, LATE, ACTUAL, or RESOURCE schedules. If the Activity data set already has a B_START and B_FINISH variable, it is overwritten by the SET= option and a warning is displayed. Note that the value RESOURCE is valid only if resource-constrained scheduling is being performed, and the value ACTUAL is valid only if the **ACTUAL** statement is present.

Note: The values ACTUAL, RESOURCE, and so on cause the B_START and B_FINISH values to be set to the *computed* values of A_START, S_START, . . . , and so on. They cannot be used to set the B_START and B_FINISH values to be equal to, say, A_START and A_FINISH or S_START and S_FINISH, if these variables are present in the Activity data set; to do that you must use B_START=A_START, B_FINISH=A_FINISH, and so on.

UPDATE=schedule

specifies the name of the schedule (EARLY, LATE, ACTUAL, or RESOURCE) that can be used to *update* the B_START and B_FINISH variables. This sets B_START and B_FINISH on the basis of the specified schedules *only* when the values of the baseline variables are missing in the Activity data set. The UPDATE option is valid only if the Activity data set already has B_START and B_FINISH. Note that if both the UPDATE= and SET= options are specified, the SET= specification is used.

CALID Statement

CALID *variable* ;

The CALID statement specifies the name of a SAS variable that is used in the Activity, Holiday, and Calendar data sets to identify the calendar to which each observation refers. This variable can be either numeric or character depending on whether the different calendars are identified by unique numbers or names. If this variable is not found in any of the three data sets, PROC CPM looks for a default variable named _CAL_ in each data set (a warning message is then printed to the log). In the

Activity data set, this variable specifies the calendar used by the activity in the given observation. Each calendar in the project is defined using the Workday, Calendar, and Holiday data sets. Each observation of the Calendar data set defines a standard work week through the shift patterns as defined by the Workday data set and a standard day length; these values are associated with the calendar identified by the value of the calendar variable in that observation. Likewise, each observation of the Holiday data set defines a holiday for the calendar identified by the value of the calendar variable.

If there is no calendar variable in the Activity data set, all activities are assumed to follow the default calendar. If there is no calendar variable in the Holiday data set, all of the holidays specified are assumed to occur in all the calendars. If there is no calendar variable in the Calendar data set, the first observation is assumed to define the default work week (which is also followed by any calendar that might be defined in the Holiday data set), and all subsequent observations are ignored. See the “Multiple Calendars” section on page 98 for further information.

DURATION Statement

DURATION *variable / options* ;
DUR *variable* ;

The DURATION statement identifies the variable in the Activity data set that contains the length of time necessary to complete the activity. If the network is input in AOA format, then the variable identifies the duration of the activity denoted by the arc joining the TAILNODE and the HEADNODE. If the network is input in AON format, then the variable identifies the duration of the activity specified in the **ACTIVITY** statement. The variable specified must be numeric. The DURATION statement must be specified. The values of the DURATION variable are assumed to be in *interval* units, where *interval* is the value of the INTERVAL= option.

If you want the procedure to compute the durations of the activities based on specified start and finish times, you can specify the start and finish times in the Activity data set, identified by the variables specified in the START= and FINISH= options. By default, the computed duration is used only if the value of the DURATION variable is missing for that activity. Note that the duration is computed in units of the INTERVAL= parameter, taking into account the calendar defined for the activity.

In addition to specifying a fixed duration for an activity, you can specify the amount of work required (in units of the INTERVAL parameter) from each resource for a given activity. The **WORK** variable enables you to specify resource-driven durations for an activity; these (possibly different) durations are used to calculate the length of time required for the activity to be completed.

The following options can be specified in the DURATION statement after a slash (/).

FINISH=*variable*

specifies a variable in the Activity data set that is to be used in conjunction with the START variable to determine the activity’s duration.

START=*variable*

specifies a variable in the Activity data set that is to be used in conjunction with the

FINISH variable to determine the activity's duration.

OVERRIDE DUR

specifies that if the **START=** and **FINISH=** values are not missing, the duration computed from these values is to be used in place of the duration specified for the activity. In other words, the computed duration is used in place of the duration specified for the activity.

HEADNODE Statement

HEADNODE *variable* ;
HEAD *variable* ;
TO *variable* ;

The HEADNODE statement is required when data are input in AOA format. This statement specifies the variable in the Activity data set that contains the name of the node on the head of an arrow in the project network. This node is identified with the event that signals the end of an activity on that arc. The variable specified can be either a numeric or character variable because the procedure treats this variable symbolically. Each node must be uniquely defined.

HOLIDAY Statement

HOLIDAY *variable / options* ;
HOLIDAYS *variable / options* ;

The HOLIDAY statement specifies the names of variables used to describe non-workdays in the **Holiday** data set. PROC CPM accounts for holidays only when the **INTERVAL=** option has one of the following values: DAY, WORKDAY, WEEKDAY, DTDAY, DTWRKDAY, DTHOUR, DTMINUTE, or DTSECOND. The HOLIDAY statement must be used with the **HOLIDATA=** option in the PROC CPM statement. Recall that the **HOLIDATA=** option identifies the SAS data set that contains a list of the holidays and non-workdays around which you schedule your project. Holidays are defined by specifying the start of the holiday (the HOLIDAY variable) and either the length of the holiday (the HOLIDUR variable) or the finish time of the holiday (the HOLIFIN variable). The HOLIDAY variable is mandatory with the HOLIDAY statement; the HOLIDUR and HOLIFIN variables are optional.

The HOLIDAY and HOLIFIN variables must be formatted as SAS date or datetime variables. If no format is associated with a HOLIDAY variable, it is assumed to be formatted as a SAS date value. If the schedule of the project is computed as datetime values (which is the case if **INTERVAL** is DTDAY, WORKDAY, and so on), the holiday variables are interpreted as follows:

- If the HOLIDAY variable is formatted as a date value, then the holiday is assumed to start at the value of the **DAYSTART=** option on the day specified in the observation and to end *d* units of *interval* later (where *d* is the value of the HOLIDUR variable and *interval* is the value of the **INTERVAL=** option).

- If the HOLIDAY variable is formatted as a datetime value, then the holiday is assumed to start at the date and time specified and to end *d* units of *interval* later.

The HOLIDUR and HOLIFIN variables are specified using the following options in the HOLIDAY statement:

HOLIDUR=*variable*

HDURATION=*variable*

identifies a variable in the [Holiday](#) data set that specifies the duration of the holiday. The INTERVAL= option specified on the PROC CPM statement is used to interpret the value of the holiday duration variables. Thus, if the duration of a holiday is specified as 2 and the value of the INTERVAL= option is WEEKDAY, the length of the holiday is interpreted as two weekdays.

HOLIFIN=*variable*

HOLIEND=*variable*

identifies a variable in the [Holiday](#) data set that specifies the finish time of the holiday defined in that observation. Note that if a particular observation contains both the duration as well as the finish time of the holiday, only the finish time is used; the duration is ignored.

ID Statement

ID *variables* ;

The ID statement identifies variables not specified in the [TAILNODE](#), [HEADNODE](#), [ACTIVITY](#), [SUCCESSOR](#), or [DURATION](#) statements that are to be included in the Schedule data set. This statement is useful for carrying any relevant information about each activity from the Activity data set to the Schedule data set.

PROJECT Statement

PROJECT *variable / options*;

PARENT *variables / options*;

The PROJECT statement specifies the variable in the Activity data set that identifies the project to which an activity belongs. This variable must be of the same type and length as the variable defined in the ACTIVITY statement. A project can also be treated as an activity with precedence and time constraints. In other words, any value of the PROJECT variable can appear as a value of the ACTIVITY variable, and it can have specifications for the DURATION, ALIGNDATE, ALIGNTYPE, ACTUAL, RESOURCE, and SUCCESSOR variables. However, some of the interpretations of these variables for a project (or supertask) may be different from the corresponding interpretation for an activity at the lowest level. See the “[Multiproject Scheduling](#)” section on page 129 for an explanation.

The following options can be specified in the PROJECT statement after a slash (/).

AGGREGATEPARENTRES**AGGREGATEP_RES****AGGREGPR**

indicates that the resource requirements for all supertasks are to be used only for aggregation purposes and not for resource-constrained scheduling.

DESCENDING**DESC**

indicates that, in addition to the ascending sort variables (ES_ASC, LS_ASC, and SS_ASC) that are requested by the ESORDER, LSORDER, and SSORDER options, the corresponding descending sort variables (ES_DESC, LS_DESC, and SS_DESC, respectively) are also to be added to the Schedule output data set.

ESORDER**ESO**

indicates that a variable named ES_ASC is to be added to the Schedule output data set; this variable can be used to order the activities in such a way that the activities within each subproject are in increasing order of the early start time. Note that this order is not necessarily the same as the one that would be obtained by sorting all the activities in the Schedule data set by E_START.

IGNOREPARENTRES**IGNOREP_RES****IGNOREPR**

indicates that the resource requirements for all supertasks are to be ignored.

LSORDER**LSO**

indicates that a variable named LS_ASC is to be added to the Schedule output data set; this variable can be used to order the activities in such a way that the activities within each subproject are in increasing order of the late start time.

ORDERALL**ALL**

is equivalent to specifying the ESORDER and LSORDER options (and the SSORDER option when resource constrained scheduling is performed).

RSCHEDORDER**RSCHDORD****RSORDER**

indicates that the order variables that are included in the Schedule output data set are also to be included in the Resource Schedule output data set.

RSCHEDWBS**RSCHDWBS****RSWBS**

indicates that the WBS code is also to be included in the Resource Schedule data set.

SEPCRT

computes individual critical paths for each project. By default, the master project's early finish time is treated as the starting point for the calculation of the backward pass (which calculates the late start schedule). The late finish time for each sub-

project is then determined during the backward pass on the basis of the precedence constraints. If a time constraint is placed on the finish time of a subproject (using the ALIGNDATE and ALIGNTYPE variables), the late finish time of the subproject is further constrained by this value.

The SEPCRIT option, on the other hand, requires the late finish time of each subproject to be less than or equal to the early finish time of the subproject. Thus, if you have a set of independent, parallel projects, the SEPCRIT option enables you to compute separate critical paths for each of the subprojects.

SSORDER

SSO

indicates that a variable named SS_ASC is to be added to the Schedule output data set; this variable can be used to order the activities in such a way that the activities within each subproject are in increasing order of the resource-constrained start time.

USEPROJDUR

USEPROJDURSPEC

USESPECDUR

uses the specified subproject duration to compute the maximum allowed late finish for each subproject. This is similar to the SEPCRIT option, except that the *specified project duration* is used to set an upper bound on each subproject's late finish time instead of the *project span* as computed from the span of all the subtasks of the project. In other words, if E_START and E_FINISH are the early start and finish times of the subproject under consideration, and the subproject duration is PROJ_DUR, where

$$\text{PROJ_DUR} = \text{E_FINISH} - \text{E_START}$$

then the SEPCRIT option sets

$$\text{L_FINISH} \leq \text{E_START} + \text{PROJ_DUR}$$

while the USEPROJDUR option sets

$$\text{L_FINISH} \leq \text{E_START} + \text{DUR}$$

where DUR is the duration specified for the subproject in the Activity data set.

WBSCODE

WBS

ADDWBS

indicates that the CPM procedure is to compute a WBS code for the activities in the project using the project hierarchy structure specified. This code is computed for each activity and stored in the variable WBS_CODE in the Schedule output data set.

RESOURCE Statement

RESOURCE *variables / resource options* ;

RES *variables / resource options* ;

The RESOURCE statement identifies the variables in the Activity data set that contain the levels of the various resources required by the different activities. This state-

ment is necessary if the procedure is required to summarize resource utilization for various resources.

This statement is also required when the activities in the network use limited resources and a schedule is to be determined subject to resource constraints in addition to precedence constraints. The levels of the various resources available are obtained from the RESOURCEIN= data set (the Resource data set.) This data set need not contain all of the variables listed in the RESOURCE statement. If any resource variable specified in the RESOURCE statement is not also found in the Resource data set, it is assumed to be available in unlimited quantity and is not used in determining the constrained schedule.

The following options are available with the RESOURCE statement to help control scheduling the activities subject to resource constraints. Some control the scheduling heuristics, some control the amount of information to be output to the RESOURCEOUT= data set (the Usage data set), and so on.

ACTDELAY=variable

specifies the name of a variable in the Activity data set that specifies a value for the maximum amount of delay allowed for each activity. The values of this variable should be greater than or equal to 0. If a value is missing, the value of the DELAY= option is used instead.

ACTIVITYPRTY=variable

ACTPRTY=variable

identifies the variable in the Activity data set that contains the priority of each activity. This option is required if resource-constrained scheduling is to be performed and the scheduling rule specified is ACTPRTY. If the value of the SCHEDRULE= option is specified as the keyword ACTPRTY, then all activities waiting for resources are ordered by increasing values of the ACTPRTY= variable. Missing values of the activity priority variable are treated as +INFINITY. See the “Scheduling Method” section on page 114 for a description of the various scheduling rules used during resource constrained scheduling.

ADDCAL

requests that a variable, _CAL_, be added to the Resource Schedule data set that identifies the resource calendar for each resource used by each activity. For observations that summarize the activity’s schedule, this variable identifies the activity’s calendar.

ALL

is equivalent to specifying the ESPROFILE and LSPROFILE options when an unconstrained schedule is obtained and is equivalent to specifying all four options, AVPROFILE (AVP), ESPROFILE (ESP), LSPROFILE (LSP), and RCPROFILE (RCP), when a resource-constrained schedule is obtained. If none of these four options are specified and a Usage data set is specified, by default the ALL option is assumed to be in effect.

ALTBEORESUP

indicates that all alternate resources are to be checked first before using supplementary resources. By default, if supplementary levels of resources are available, the

procedure uses supplementary levels first and uses alternate resources only if the supplementary levels are not sufficient.

APPEND

APPENDINTXRATE

APPENDRATEXINT

APPENDUSAGE

indicates that the Usage data set is to contain two sets of observations: the first set indicates the *rate* of usage for each resource at the beginning of the current time period, and the second set contains the *total* usage of each resource for the current time period. In other words, the Usage data set appends observations indicating the total usage of each resource to the default set of observations. If the APPEND option is specified, the procedure adds a variable named OBS_TYPE to the Usage data set. This variable contains the value 'RES_RATE' for the observations that indicate rate of usage and the value 'RES_USED' for the observations that indicate the total usage.

AROUTCAL=*calname*

specifies the name of the calendar to be used for incrementing the _TIME_ variable in the Usage data set.

AVPROFILE

AVP

AVL

creates one variable in the Usage data set corresponding to each variable in the RESOURCE statement. These new variables denote the amount of resources remaining after resource allocation. This option is ignored if resource allocation is not performed.

AWAITDELAY

forces PROC CPM to wait until $L_START + \textit{delay}$, where *delay* is the maximum delay allowed for the activity (which is the value of the ACTDELAY= variable or the DELAY= option), before an activity is scheduled using supplementary levels of resources. By default, even if an activity has a nonzero value specified for the ACTDELAY= variable (or the DELAY= option), it may be scheduled using supplementary resources before $L_START + \textit{delay}$. This happens if the procedure does not see any increase in the resource availability in the future. Thus, if it appears that the activity will require supplementary resources anyway, the procedure may schedule it before $L_START + \textit{delay}$. The AWAITDELAY option prohibits this behavior; it will not use supplementary resources to schedule an activity before $L_START + \textit{delay}$. This option can be used to force activities with insufficient resources to start at L_START by setting DELAY=0.

CUMUSAGE

specifies that the Usage data set should indicate the cumulative usage of consumable resources. Note that by default, for consumable resources, each observation in the Usage data set contains the rate of usage for each resource at the start of the given time interval. See the “[RESOURCEOUT= Usage Data Set](#)” section on page 124 for a definition of the variables in the resource usage output data set. In some applications, it may be useful to obtain the cumulative usage of these resources. The CUMUSAGE

option can be used to obtain the cumulative usage of consumable resources up to the time specified in the `_TIME_` variable.

DELAY=delay

specifies the maximum amount by which an activity can be delayed due to lack of resources. If `E_START` of an activity is 1JUN04 and `L_START` is 5JUN04 and `delay` is specified as 2, PROC CPM first tries to schedule the activity to start on June 1, 2004. If there are not enough resources to schedule the activity, the CPM procedure postpones the activity's start time. However, it does not postpone the activity beyond June 7, 2004 (because `delay=2` and `L_START=5JUN04`).

If the activity cannot be scheduled even on 7JUN04, then PROC CPM tries to schedule it by using supplementary levels of resources, if available, or by using alternate resources, if possible. If resources are still not sufficient, the procedure stops with an error message. The default value of the `DELAY=` option is assumed to be `+INFINITY`.

DELAYANALYSIS

SLIPINF

causes the addition of three new variables to the Schedule data set. The variables are `R_DELAY`, `DELAY_R` and `SUPPL_R`. The `R_DELAY` variable indicates the number of units (in *interval* units) by which the activity's schedule has slipped due to resource unavailability, and the `DELAY_R` variable contains the name of the resource, the *delaying resource*, that has caused the slippage.

The `R_DELAY` variable is calculated as follows: it is the difference between `S_START` and the time when an activity first enters the list of activities that are available to be scheduled. (See the “[Scheduling Method](#)” section on page 114 for a definition of this waiting list of activities.) Note that `R_DELAY` is not necessarily the same as `S_START - E_START`.

If several resources are insufficient, causing a delay in the activity, `DELAY_R` is the name of the resource that *first* causes an activity to be postponed.

The variable `SUPPL_R` contains the name of the *first* resource that is used above the primary level in order for an activity to be scheduled at `S_START`.

ESPROFILE

ESP

ESS

creates one variable in the Usage data set corresponding to each variable in the `RESOURCE` statement. Each new variable denotes the resource usage based on the early start schedule for the corresponding resource variable.

E_START

requests that the `E_START` and `E_FINISH` variables, namely the variables specifying the early start schedule, be included in the Schedule data set in addition to the `S_START` and `S_FINISH` variables. This option is the default and can be turned off using the `NOE_START` option.

EXCLUNSCHED

excludes the resource consumption corresponding to unscheduled activities from the daily resource usage reported for each time period in the Usage data set. Note that

the Usage data set contains a variable named *Rresname* for each resource variable *resname*. For each observation in this data set, each such variable contains the total amount of resource (*rate of usage* for a consumable resource) used by all the activities that are active at the time period corresponding to that observation. By default, this calculation includes even activities that are still unscheduled when resource constrained scheduling is stopped either by the STOPDATE= option or due to resource infeasibilities. The EXCLUNSCHED option enables the exclusion of activities that are still unscheduled. Note that the unscheduled activities are assumed to start as per the early start schedule (unless the UPDTUNSCHED option is specified).

FILLUNSCHED

FILLMISSING

fills in S_START and S_FINISH values for activities that are still unscheduled when resource constrained scheduling is stopped either by the STOPDATE= option or due to resource infeasibilities. By default, the Schedule data set contains missing values for S_START and S_FINISH corresponding to unscheduled activities. If the FILLUNSCHED option is on, the procedure uses the original E_START and E_FINISH times for these activities. If the UPDTUNSCHED option is also specified, the procedure uses *updated* values.

F_FLOAT

requests that the Schedule data set include the F_FLOAT variable computed using the unconstrained early and late start schedules. Note that if resource allocation is not performed, this variable is always included in the output data set.

INCLUNSCHED

enables the inclusion of activities that are still unscheduled in the computation of daily (or cumulative) resource usage in the Usage data set when resource-constrained scheduling is stopped either by the STOPDATE= option or due to resource infeasibilities. This option is the default and can be turned off by the EXCLUNSCHED option.

INDEPENDENTALLOC

INDEPALLOC

enables each resource to be scheduled independently for each activity during resource-constrained scheduling. Consider the basic resource scheduling algorithm described in the “[Scheduling Method](#)” section on page 114. When all the precedence requirements of an activity are satisfied, the activity is inserted into the list of activities that are waiting for resources using the appropriate scheduling rule. An activity in this list is scheduled to start at a particular time only if *all* the resources required by it are available in sufficient quantity. Even if the resources are required by the activity for different lengths of time, or if the resources have different calendars, all resources must be available to start at that particular time (or at the beginning of the next work period for the resource’s calendar).

If you specify the INDEPENDENTALLOC option, however, each resource is scheduled independently of the others. This may cause an activity’s schedule to be extended if its resources cannot all start at the same time.

INFEASDIAGNOSTIC**INFEASDIAG**

requests PROC CPM to continue scheduling even when resources are insufficient. When PROC CPM schedules the project subject to resource constraints, the scheduling process is stopped when the procedure cannot find sufficient resources for an activity before the activity's latest possible start time (accounting for the DELAY= or ACTDELAY= options and using supplementary or alternate resources if necessary and if allowed). The INFEASDIAGNOSTIC option can be used to override this default action. (Sometimes, you may want to know the level of resources needed to schedule a project to completion even if resources are insufficient.) This option is equivalent to specifying infinite supplementary levels for all the resources under consideration; the DELAY= value is assumed to equal the default value of +INFINITY, unless otherwise specified.

LSPROFILE**LSP****LSS**

creates one variable in the Usage data set corresponding to each variable in the RESOURCE statement. Each new variable denotes the resource usage based on the late start schedule for the corresponding resource variable.

L_START

requests that the L_START and L_FINISH variables, namely the variables specifying the late start schedule, be included in the Schedule data set in addition to the S_START and S_FINISH variables. This option is the default and can be turned off using the NOL_START option.

MAXDATE=*maxdate*

specifies the maximum value of the _TIME_ variable in the Usage data set. The default value of *maxdate* is the maximum finish time for all of the schedules for which a usage profile was requested.

MAXNSEGMT=*variable***MAXNSEG=*variable***

specifies a variable in the Activity data set that indicates the maximum number of segments that the current activity can be split into. A missing value for this variable is set to a default value that depends on the duration of the activity and the value of the MINSEGMTDUR variable. A value of 1 indicates that the activity cannot be split. By default, PROC CPM assumes that any activity, once started, cannot be stopped until it is completed (except for breaks due to holidays or weekends). Thus, even during resource-constrained scheduling, an activity is scheduled only if enough resources can be found for it throughout its *entire* duration. Sometimes, you may want to allow preemption of activities already in progress; thus, a more *critical* activity could cause another activity to be split into two or more segments.

However, you may not want a particular activity to be split into too many segments, or to be split too many times. The MAXNSEGMT= and MINSEGMTDUR= options enable you to control the number of splits and the length of each segment.

MAXOBS=*max*

specifies an upper limit on the number of observations that the Usage data set can contain. If the values specified for the ROUTINTERVAL= and ROUTINTPER= options are such that the data set will contain more than *max* observations, then PROC CPM does not create the output data set and stops with an error message.

The MAXOBS= option is useful as a check to ensure that a very large data set (with several thousands of observations) is not created due to a wrong specification of the ROUTINTERVAL= option. For example, if *interval* is DTYEAR and *rouinterval* is DTHOUR and the project extends over 2 years, the number of observations would exceed 15,000. The default value of the MAXOBS= option is 1000.

MILESTONERESOURCE

specifies that milestone activities consume resources. If a nonzero requirement is specified for a milestone, the corresponding consumable resources are used at the scheduled time of that milestone.

MILESTONENORESOURCE

specifies that milestone activities do not consume resources. This implies that all resource requirements are ignored for milestone activities. This is the default behavior.

MINDATE=*mindate*

specifies the minimum value of the _TIME_ variable in the Usage data set. The default value of *mindate* is the minimum start time for all of the schedules for which a usage profile is requested. Thus, the Usage data set has observations containing the resource usage and availability information from *mindate* through *maxdate*.

MINSEGMDUR=*variable***MINSEGD=*variable***

specifies a variable in the Activity data set that indicates the minimum duration of any segment of the current activity. A missing value for this variable is set to a value equal to one fifth of the activity's duration.

MULTIPLEALTERNATES**MULTALT**

indicates that multiple alternate resources can be used to substitute for a single resource. In other words, if one of the alternate resources is not sufficient to substitute for the primary resource, the procedure will use other alternates, as needed, to fulfill the resource requirement. For example, if an activity needs 1.5 programmers and the allowed alternates are JOHN and MARY, the procedure will use JOHN (at rate 1) and MARY (at rate 0.5) to allocate a total of 1.5 programmers. See the [“Specifying Multiple Alternates”](#) section on page 121 for details.

NOE_START

requests that the E_START and E_FINISH variables, namely the variables specifying the early start schedule, be dropped from the Schedule data set. Note that the default is E_START. Also, if resource allocation is not performed, the NOE_START option is ignored.

NOF_FLOAT

requests that the F_FLOAT variable be dropped from the Schedule data set when resource-constrained scheduling is requested. This is the default behavior. To in-

clude the F_FLOAT variable in addition to the resource-constrained schedule, use the F_FLOAT option. Note that if resource allocation is not performed, F_FLOAT is always included in the Schedule data set.

NOL_START

requests that the Schedule data set does not include the late start schedule, namely, the L_START and L_FINISH variables. Note that the default is L_START. Also, if resource allocation is not performed, the NOL_START option is ignored.

NORESOURCEVARS**NORESARGSOUT****NORESARGS**

requests that the variables specified in the RESOURCE statement be dropped from the Schedule data set. By default, all of the resource variables specified on the RESOURCE statement are also included in the Schedule data set.

NOT_FLOAT

requests that the T_FLOAT variable be dropped from the Schedule data set when resource-constrained scheduling is requested. This is the default behavior. To include the T_FLOAT variable in addition to the resource-constrained schedule, use the T_FLOAT option. Note that if resource allocation is not performed, T_FLOAT is always included in the Schedule data set.

NROUTCAL=*calnum*

specifies the number of the calendar to be used for incrementing the _TIME_ variable in the Usage data set.

OBSTYPE=*variable*

specifies a character variable in the Resource data set that contains the type identifier for each observation. Valid values for this variable are RESLEVEL, RESTYPE, RESUSAGE, RESPRTY, SUPLEVEL, ALTRATE, ALTPRTY, RESRCDUR, CALENDAR, MULTALT, MINARATE, and AUXRES. If OBSTYPE= is not specified, then all observations in the data set are assumed to denote the levels of the resources, and all resources are assumed to be replenishable and constraining.

PERIOD=*variable***PER=*variable***

identifies the variable in the RESOURCEIN= data set that specifies the date from which a specified level of the resource is available for each observation with the OBSTYPE variable equal to 'RESLEVEL'. It is an error if the PERIOD= variable has a missing value for any observation specifying the levels of the resources or if the Resource data set is not sorted in increasing order of the PERIOD= variable.

RCPROFILE**RCP****RCS**

creates one variable in the Usage data set corresponding to each variable in the RESOURCE statement. Each new variable denotes the resource usage based on the resource-constrained schedule for the corresponding resource variable. This option is ignored if resource allocation is not performed.

RESCALINTERSECT**RESCALINT****RCI**

specifies that an activity can be scheduled only during periods that are common working times for all resource calendars (corresponding to the resources used by that activity) and the activity's calendar. This option is valid only if multiple calendars are in use and if calendars are associated with individual resources. Use this option with caution; if an activity uses resources that have mutually disjoint calendars, that activity can never be scheduled. For example, if one resource works a night shift while another resource works a day shift, the two calendars do not have any common working time.

Note that only primary resources are included in the intersection; any alternate or auxiliary resources are not included when determining the common working calendar for the activity.

If you do not specify the RESCALINTERSECT option, and resources have independent calendars, then the procedure schedules each resource using its own calendar. Thus, an activity can have one resource working on a five-day calendar, while another resource is working on a seven-day calendar.

RESID=variable

specifies a variable in the RESOURCEIN= data set that indicates the name of the resource variable for which *alternate resource information* or *auxiliary resource information* is being specified in that observation.

Observations that indicate alternate resources are identified by the values 'ALTRATE' and 'ALTPRTY' for the OBSTYPE variable. These values indicate whether the observation specifies a *rate of substitution* or a *priority for substitution*; the value of the RESID variable in such an observation indicates the particular resource for which alternate resource information is specified in that observation. Note that the specification of the RESID= option triggers the use of alternate resources. See the "[Specifying Alternate Resources](#)" section on page 120 for further information.

Observations indicating auxiliary resources are identified by the value 'AUXRES' for the OBSTYPE variable. Such observations specify the name of the primary resource as the value of the RESID variable and the rate of auxiliary resources needed for every unit of the primary resource as values of the other resource variables. See the "[Auxiliary Resources](#)" section on page 123 for further information.

RESOURCEVARS**RESVARSOUT**

requests that the variables specified in the [RESOURCE](#) statement be included in the Schedule data set. These include the RESOURCE variables identifying the resource requirements, the activity priority variable, the activity delay variable, and any variables specifying activity splitting information. This option is the default and can be turned off by the NORESVARSOUT option.

ROUTINTERVAL=routinterval**STEPINT=routinterval**

specifies the units to be used to determine the time interval between two successive values of the _TIME_ variable in the Usage data set. It can be used in conjunction

with the `ROUTINTPER=` option to control the amount of information to be included in the data set. Valid values for *routinginterval* are DAY, WORKDAY, WEEK, MONTH, WEEKDAY, QTR, YEAR, DTDAY, DTWRKDAY, DTWEEK, DTMONTH, DTQTR, DTYEAR, DTSECOND, DTMINUTE, DTHOUR, SECOND, MINUTE, or HOUR. The value of this parameter must be chosen carefully; a massive amount of data could be generated by a bad choice. If this parameter is not specified, a default value is chosen depending on the format of the schedule variables.

ROUTINTPER=*routingper*

STEPSIZE=*routingper*

STEP=*routingper*

specifies the number of *routinginterval* units between successive observations in the Usage data set where *routinginterval* is the value of the `ROUTINTERVAL=` option. For example, if *routinginterval* is MONTH and *routingper* is 2, the time interval between each pair of observations in the Usage data set is two months. The default value of *routingper* is 1. If *routinginterval* is blank (' '), then *routingper* can be used to specify the exact numeric interval between two successive values of the `_TIME_` variable in the Usage data set. Note that *routingper* is only allowed to have integer values when *routinginterval* is specified as one of the following: WEEK, MONTH, QTR, YEAR, DTWEEK, DTMONTH, DTQTR, or DTYEAR.

ROUTNOBREAK

ROUTCONT

specifies that the `_TIME_` variable is to be incremented using a calendar with no breaks or holidays. Thus, the Usage data set contains one observation per unit *routinginterval* from *mindate* to *maxdate*, without any breaks for holidays or weekends. Note that, by default, the `_TIME_` variable is incremented using the default calendar; thus, if the default calendar follows a five-day work week, the Usage data set skips weekends.

RSCHEDID=*(variables)*

RSID=*(variables)*

identifies variables not specified in the `TAILNODE`, `HEADNODE`, or `ACTIVITY` statements that are to be included in the Resource Schedule data set. This option is useful for carrying any relevant information about each activity from the Activity data set to the Resource Schedule data set.

SCHEDRULE=*schedrule*

RULE=*schedrule*

specifies the rule to be used to order the list of activities whose predecessor activities have been completed while scheduling activities subject to resource constraints. Valid values for *schedrule* are LST, LFT, SHORTDUR, ACTPRTY, RESPRTY, and DELAYLST. (See the “Scheduling Rules” section on page 116 for more information.) The default value of `SCHEDRULE` is LST. If an invalid specification is given for the `SCHEDRULE=` option, the default value is used, and a warning message is displayed in the log.

SCHEDRULE2=*schedrule2***RULE2=***schedrule2*

specifies the rule to be used to break ties caused by the SCHEDRULE= option. Valid values for *schedrule2* are LST, LFT, SHORTDUR, ACTPRTY, RESPRTY, and DELAYLST. Note that ACTPRTY and RESPRTY cannot be specified at the same time for the two scheduling rules; in other words, if *schedrule* is ACTPRTY, *schedrule2* cannot be RESPRTY and vice versa.

SPLITFLAG

indicates that activities are allowed to be split into segments during resource allocation. This option can be used instead of specifying either the MAXNSEGMT= or the MINSEGMDUR= variable; PROC CPM assumes that the activity can be split into no more than five segments.

STOPDATE=*stdate*

specifies the cutoff date for resource-constrained scheduling. When such a date is specified, S_START and S_FINISH are set to missing beyond the cutoff date. Options are available to set these missing values to the original E_START and E_FINISH times (FILLUNSCHED) or to updated values based on the scheduled activities (UPDTUNSCHED).

T_FLOAT

requests that the Schedule data set include the T_FLOAT variable computed using the unconstrained early and late start schedules. Note that if resource allocation is not performed, this variable is always included in the Schedule data set.

TOTUSAGE**INTXRATE****INTUSAGE****RATEXINT**

specifies that the Usage data set is to indicate the *total* usage of the resource for the current time period. The current time period is the time interval from the time specified in the *_TIME_* variable for the current observation to the time specified in the *_TIME_* variable for the next observation. The total usage is computed taking into account the relevant activity and resource calendars. Note that, by default, the observations in the Usage data set specify the *rate* of usage for each resource at the beginning of the current time period. The TOTUSAGE option specifies the *product* of the rate and the time interval between two successive observations. To get both the *rate* and the *product*, use the APPEND option.

UNSCHEDMISS

sets the S_START and S_FINISH values to missing for activities that are still unscheduled when resource constrained scheduling is stopped either by the STOPDATE= option or due to resource infeasibilities. This is the default and can be turned off by specifying the FILLUNSCHED option.

UPDTUNSCHED

causes the procedure to use the S_START and S_FINISH times of *scheduled* activities to update the *projected* start and finish times for the activities that are still unscheduled when resource constrained scheduling is stopped either by the

STOPDATE= option or due to resource infeasibilities. These updated dates are used as the S_START and S_FINISH times.

WORK=variable

identifies a variable in the Activity data set that specifies the total amount of work required by one unit of a resource. This work is represented in units of the INTERVAL parameter. The procedure uses the rate specified for the resource variable to compute the duration of the activity for that resource. Thus, if the value of the WORK variable is 10, and the value of the resource variable R1 is 2, then the activity requires 5 *interval* units for the resource R1. For details, see the “Resource-Driven Durations and Resource Calendars” section on page 108.

SUCCESSOR Statement

SUCCESSOR variables / lag options ;

SUCC variables / lag options ;

The SUCCESSOR statement is required when data are input in an AON format. This statement specifies the variables that contain the names of the immediate successor nodes (activities) to the ACTIVITY node. These variables must be of the same type and length as those defined in the ACTIVITY statement.

If the project does not have any precedence relationships, it is not necessary to use the SUCCESSOR statement. Thus, you can specify only the ACTIVITY statement without an accompanying SUCCESSOR statement.

If the precedence constraints among the activities have some nonstandard relationships, you can specify these using the LAG options. The following is a list of LAG options.

ALAGCAL=calname

specifies the name of the calendar to be used for all lags. The default value for this option is the DEFAULT calendar.

LAG=variables

specifies the variables in the Activity data set used to identify the lag relationship (lag type, duration, and calendar) between the activity and its successor. The LAG variables must be character variables. You can specify as many LAG variables as there are SUCCESSOR variables; each SUCCESSOR variable is matched with the corresponding LAG variable. You must specify the LAG variables enclosed in parentheses. In a given observation, the *i*th LAG variable specifies the type of relation between the current activity (as specified by the ACTIVITY variable) and the activity specified by the *i*th SUCCESSOR variable. If there are more LAG variables than SUCCESSOR variables, the extra LAG variables are ignored; conversely, if there are fewer LAG variables, the extra SUCCESSOR variables are all assumed to indicate successors with a *standard* (finish-to-start) relationship.

In addition to the type of relation, you can also specify a lag duration and a lag calendar in the same variable. The relation_lag_calendar information is expected to be specified as

keyword _ duration _ calendar

where *keyword* is one of ‘ ’, FS, SS, SF, or FF, *duration* is a number specifying the duration of the lag (in *interval* units), and *calendar* is either a calendar name or number identifying the calendar followed by the lag duration. A missing value for the *keyword* is assumed to mean the same as FS, which is the standard relation of *finish-to-start*. The other three values, SS, SF, and FF, denote relations of the type *start-to-start*, *start-to-finish*, and *finish-to-finish*, respectively. If there are no LAG variables, all relationships are assumed to be of the type *finish-to-start* with no lag duration. Table 2.19 contains some examples of lag specifications.

Table 2.19. Lag Specifications

Activity	Successor	LAG	Interpretation
A	B	SS_3	Start to start lag of 3 units
A	B	_5.5	Finish to start lag of 5.5 units
A	B	FF_4	Finish to finish lag of 4 units
A	B	_SS	Invalid and ignored (with warning)
A	B	SS_3	Ignored
A	B	SS_3_1	Start to start lag of 3 units w.r.t. calendar 1

NLAGCAL=*calnum*

specifies the number of the calendar to be used for all lags. The default value for this option is the DEFAULT calendar.

TAILNODE Statement

TAILNODE *variable* ;

TAIL *variable* ;

FROM *variable* ;

The TAILNODE statement is required when data are input in AOA (arrow notation) format. It specifies the variable that contains the name of each node on the tail of an arc in the project network. This node is identified with the event that signals the *start* of the activity on that arc. The variable specified can be either a numeric or character variable since the procedure treats this variable symbolically. Each node must be uniquely defined.

Details

This section provides a detailed outline of the use of the CPM procedure. The material is organized in subsections that describe different aspects of the procedure. They have been placed in increasing order of functionality. The first section describes how to use PROC CPM to schedule a project subject only to precedence constraints. The next two sections describe some of the features that enable you to control the units of duration and specify nonstandard precedence constraints. In the “[Time-Constrained Scheduling](#)” section on page 92, the statements needed to place time constraints on the activities are introduced. The “[Finish Milestones](#)” section on page 94 describes some options controlling the treatment of milestones.

The “[OUT= Schedule Data Set](#)” section on page 95 describes the format of the schedule output data set (the Schedule data set). The “[Multiple Calendars](#)” section on page 98 deals with calendar specifications for the different activities.

The “[Baseline and Target Schedules](#)” section on page 104 describes how you can save specific schedules as baseline or target schedules. The “[Progress Updating](#)” section on page 105 describes how to incorporate the actual start and finish times for a project that is already in progress. The “[Resource-Driven Durations and Resource Calendars](#)” section on page 108 describes how the WORK variable can be used to specify resource-driven durations and the effect of resource calendars on the activity schedules.

Next, the “[Resource Usage and Allocation](#)” section on page 109 pertains to resource usage and resource-constrained scheduling and describes how to specify information about the resources and the resource requirements for the activities. The scheduling algorithm is also described in this section and some advanced features such as alternate resources, auxiliary resources, negative resource requirements, and so on, are discussed under separate subsections.

The “[RESOURCEOUT= Usage Data Set](#)” section on page 124 describes the format of the resource usage output data set (the Usage data set) and explains how to interpret the variables in it.

When resource-driven durations are specified or resource calendars are in effect, each resource used by an activity may have a different schedule. In this case, the Resource Schedule data set, described in the “[RESOURCESCHED= Resource Schedule Data Set](#)” section on page 128, contains the individual resource schedules for each activity.

The “[Multiproject Scheduling](#)” section on page 129 describes how you can use PROC CPM when there are multiple projects that have been combined together in a multi-project structure.

PROC CPM also defines a macro variable that is described in the “[Macro Variable _ORCPM_](#)” section on page 132. [Table 2.24](#) in the “[Input Data Sets and Related Variables](#)” section on page 133 lists all the variables used by the CPM procedure and the data sets that contain them. [Table 2.25](#) in the “[Missing Values in Input Data Sets](#)” section on page 135 lists all of the variables in the different input data sets and describes how PROC CPM treats missing values corresponding to each of them. Finally, the “[FORMAT Specification](#)” section on page 136 underlines the importance of associating the correct FORMAT specification with all the date-type variables, and the “[Computer Resource Requirements](#)” section on page 136 indicates the storage and time requirements of the CPM procedure.

Scheduling Subject to Precedence Constraints

The basic function of the CPM procedure is to determine a schedule of the activities in a project subject to precedence constraints among them. The minimum amount of information that is required for a successful invocation of PROC CPM is the network information specified either in AON or AOA formats and the duration of each activity in the network. The INTERVAL= option specifies the units of duration, and the DATE= option specifies a start date for the project. If a start date is not specified for

the project, the schedule is computed as unformatted numerical values with a project start date of 0. The `DATE=` option can be a SAS date, time, or datetime value (or a number) and can be used to specify a start date for the project. In addition to the start date of the project, you can specify a desired *finish date* for the project using the `FBDATE=` option.

`PROC CPM` computes the early start schedule as well as the late start schedule for the project. The project start date is used as the starting point for the calculation of the early start schedule, while the project completion date is used in the computation of the late start schedule. The early start time (`E_START`) for all *start* activities (those activities with no predecessors) in the project is set to be equal to the value of the `DATE` parameter (if the `FINISHBEFORE` option is not specified). The early finish time (`E_FINISH`) for each start activity is computed as $E_START + dur$, where *dur* is the activity's duration (as specified in the Activity data set). For each of the other activities in the network, the early start time is computed as the maximum of the early finish time of all its immediate predecessors.

The project finish time is computed as the maximum of the early finish time of all the activities in the network. The late finish time (`L_FINISH`) for all the *finish* activities (those activities with no successors) in the project is set to be equal to the project finish time. The late start time (`L_START`) is computed as $L_FINISH - dur$. For each of the other activities in the network, the late finish time is computed as the minimum of the late start time of all its immediate successors. If the `FIXFINISH` option is specified, the late finish time for each finish activity is set to be equal to its early finish time. In other words, the finish activities are not allowed to float to the end of the project.

Once the early and late start schedules have been computed, the procedure computes the free and total float times for each activity. Free float (`F_FLOAT`) is defined as the maximum delay that can be allowed in an activity without delaying a successor activity. Total float (`T_FLOAT`) is calculated as the difference between the activity's late finish time and early finish time; it indicates the amount of time by which an activity can be delayed without delaying the entire project. The values of both the float variables are calculated in units of the `INTERVAL` parameter.

An activity that has zero `T_FLOAT` is said to be *critical*. As a result of the forward and backward pass computations just described, there is at least one path in the project network that contains only critical activities. This path is called the *critical path*. The duration of the project is equal to the length of the critical path.

If the `FBDATE=` option is also specified, the project finish time is set equal to the value of the `FBDATE=` option. The backward pass computation is initiated by setting the late finish time for all the finish activities in the project to be equal to *fbdate*. If the project finish time, as computed from the forward pass calculations, is different from *fbdate*, the longest path in the network may no longer have 0 total float. In such a situation, the critical path is defined to be the path in the network with the least total float. Activities with negative `T_FLOAT` are referred to as *supercritical* activities.

Note: An important requirement for a project network is that it should be *acyclic* (cycles are not allowed). A network is said to contain a *cycle* (or *loop*) if the precedence

relationships starting from an activity loops back to the same activity. The forward and backward pass computations cannot be performed for a cyclic network. If the project network has a cycle, the CPM procedure stops processing after identifying the cycle.

Using the INTERVAL= Option

The INTERVAL= option enables you to define the units of the DURATION variable; that is, you can indicate whether the durations are specified as hours, minutes, days, or in terms of workdays, and so on. In addition to specifying the units, the INTERVAL= option also indicates whether the schedule is to be output as SAS time, date, or datetime values, or as unformatted numeric values.

The prefix *DT* in the value of the INTERVAL= option (as in DTDAY, DTWEEK, and so on) indicates to PROC CPM that the schedule is output as SAS datetime values, and the DATE= option is expected to be a SAS datetime value. Thus, use DTYEAR, DTMONTH, DTQTR, or DTWEEK instead of the corresponding YEAR, MONTH, QTR, or WEEK if the DATE= option is specified as a SAS datetime value.

The start and finish times for the different schedules computed by PROC CPM denote the first and last *day* of work, respectively, when the values are formatted as SAS *date* values. If the times are SAS *time* or *datetime* values, they denote the first and last *second* of work, respectively.

If the INTERVAL= option is specified as WORKDAY, the procedure schedules work on weekdays and nonholidays starting at 9 a.m. and ending at 5 p.m. If you use INTERVAL=DTWRKDAY, the procedure also schedules work only on weekdays and nonholidays. In this case, however, the procedure expects the DATE= option to be a SAS datetime value, and the procedure interprets the start of the workday from the time portion of that option. To change the length of the workday, use the DAYLENGTH= option in conjunction with INTERVAL=DTWRKDAY.

The procedure sets the default value of the INTERVAL= option on the basis of the units of the DATE= option. Table 2.20 lists various valid combinations of the INTERVAL= option and the type of the DATE= option (number, SAS time, date or datetime value) and the resulting interpretation of the duration units and the format type of the schedule variables (numbers, SAS time, date or datetime format) output to the Schedule data set. For each DATE type value, the first INTERVAL value is the default. Thus, if the DATE= option is a SAS date value, the default value of the INTERVAL= option is DAY, and so on.

For the first five specifications of the INTERVAL= option in the last part of Table 2.20 (DTDAY, . . . , DTHOUR), the day starts at *daystart* and is *daylength* hours long.

Note that the procedure may change the INTERVAL= specification and the units of the schedule variables to be compatible with the format specification of the ALIGNDATE variable, or the A_START or A_FINISH variables in the Activity data set, or the PERIOD variable in the Resource data set. For example, if *interval* is specified as DAY, but the ALIGNDATE variable contains SAS datetime values, the schedule is computed in SAS datetime values. Similarly, if *interval* is specified as

DAY or WEEKDAY, but some of the durations are fractional, the schedule is computed as SAS datetime values.

Table 2.20. INTERVAL= and DATE= Parameters and Units of Duration

DATE Type	INTERVAL	Units of Duration	Format of Schedule Variables
number		period	unformatted
SAS time	HOUR	hour	SAS time
	MINUTE	minute	SAS time
	SECOND	second	SAS time
SAS date	DAY	day	SAS date
	WEEKDAY	day (5-day week)	SAS date
	WORKDAY	day (5-day week: 9-5 day)	SAS datetime
	WEEK	week	SAS date
	MONTH	month	SAS date
	QTR	quarter	SAS date
	YEAR	year	SAS date
SAS datetime	DTDAY	day (7-day week)	SAS datetime
	DTWRKDAY	day (5-day week)	SAS datetime
	DTSECOND	second	SAS datetime
	DTMINUTE	minute	SAS datetime
	DTHOUR	hour	SAS datetime
	DTWEEK	week	SAS datetime
	DTMONTH	month	SAS datetime
	DTQTR	quarter	SAS datetime
	DTYEAR	year	SAS datetime

Nonstandard Precedence Relationships

A *standard* precedence constraint between two activities (for example, activity A and an immediate successor B) implies that the second activity is ready to start as soon as the first activity has finished. Such a relationship is called a *finish-to-start* relationship with zero lag. Often, you want to specify other types of relationships between activities; for example,

- activity B can start five days after activity A has started: start-to-start lag of five days
- activity B can start three days after activity A has finished: finish-to-start lag of three days.

The AON representation of the network enables you to specify such relationships between activities: use the LAG= option in the SUCCESSOR statement. This enables you to use variables in the Activity data set that specify the type of relationship between two activities and the time lag between the two events involved; you can also

specify the calendar to be used in measuring the lag duration. See the “[SUCCESSOR Statement](#)” section on page 86 for information on the specification. [Example 2.11](#), “Nonstandard Relationships,” in the “Examples” section illustrates a nonstandard precedence relationship.

This section briefly discusses how the computation of the early and late start schedules, described in the “[Scheduling Subject to Precedence Constraints](#)” section on page 88, changes in the presence of nonstandard relationships.

For each (predecessor, successor) pair of activities, the procedure saves the lag type, lag duration, and lag calendar information. Suppose that the predecessor is A, the immediate successor is B, the durations of the two activities are $durA$ and $durB$, respectively, and the activity’s early start and finish times are pes and pef , respectively. Suppose further that the lag type is lt , lag duration is ld , and lag calendar is lc . Recall that the basic forward and backward passes described in the “[Scheduling Subject to Precedence Constraints](#)” section on page 88 assume that all the precedence constraints are standard of the type finish-to-start with zero lag. Thus, in terms of the notation just defined, the early start time of an activity is computed as the maximum of pef for all the preceding activities. However, in the presence of nonstandard relationships, the predecessor’s value used to compute an activity’s early start time depends on the lag type and lag value. [Table 2.21](#) lists the predecessor’s value that is used to determine the successor’s early start time.

Table 2.21. Effect of Lag Duration and Calendar on Early Start Schedule

Lag Type	Definition	Value Used to Compute Successor’s E_START
FS	finish-to-start	$pef + ld$
SS	start-to-start	$pes + ld$
SF	start-to-finish	$pes + ld - durB$
FF	finish-to-finish	$pef + ld - durB$

Note that the addition of the lag durations (ld) is in units following the lag calendar lc ; the subtraction of $durB$ is in units of the activity B’s calendar. The backward pass to determine the late start schedule is modified in a similar way to include lag durations and calendars.

Time-Constrained Scheduling

You can use the DATE= and FBDATE= options in the PROC CPM statement (or the DATE= option in conjunction with the FINISHBEFORE option) to impose start and finish dates on the project as a whole. Often, you want to impose start or finish constraints on individual activities within the project. The [ALIGNDATE](#) and [ALIGNTYPE](#) statements enable you to do so. For each activity in the project, you can specify a particular date (as the value of the ALIGNDATE variable) and whether you want the activity to start on or finish before that date (by specifying one of several *alignment types* as the value of the ALIGNTYPE variable). PROC CPM uses all these dates in the computation of the early and late start schedules.

The following explanation best illustrates the restrictions imposed on the start or finish times of an activity by the different types of alignment allowed. Let d denote

the value of the ALIGNDATE variable for a particular activity and let dur be the activity's duration. If $minsdate$ and $maxfdate$ are used to denote the earliest allowed start date and the latest allowed finish date, respectively, for the activity, then Table 2.22 illustrates the values of $minsdate$ and $maxfdate$ as a function of the value of the ALIGNTYPE variable.

Once the $minsdate$ and $maxfdate$ dates have been calculated for all of the activities in the project, the values of $minsdate$ are used in the computation of the *early start* schedule and the values of $maxfdate$ are used in the computation of the *late start* schedule.

Table 2.22. Determining Alignment Date Values with the ALIGNTYPE Statement

Keywords	Alignment Type	$minsdate$	$maxfdate$
SEQ	start equal	d	$d + dur$
SGE	start greater than or equal	d	$+ infinity$
SLE	start less than or equal	$- infinity$	$d + dur$
FEQ	finish equal	$d - dur$	d
FGE	finish greater than or equal	$d - dur$	$+ infinity$
FLE	finish less than or equal	$- infinity$	d
MS	mandatory start	d	$d + dur$
MF	mandatory finish	$d - dur$	d

For the first six alignment types in Table 2.22, the value of $minsdate$ specifies a lower bound on the early start time and the value of $maxfdate$ specifies an upper bound on the late finish time of the activity. The early start time (E_START) of an activity is computed as the maximum of its $minsdate$ and the early finish times (E_FINISH) of all its predecessors ($E_FINISH = E_START + dur$). If nonstandard relationships are present in the project, the predecessor's value that is used depends on the type of the lag and the lag duration; Table 2.21 in the previous section lists the values used as a function of the lag type. If a target completion date is not specified (using the FBDATE or FINISHBEFORE options), the project completion time is determined as the maximum value of E_FINISH over all of the activities in the project. The late finish time (L_FINISH) for each of the finish activities (those with no successors) is computed as the minimum of its $maxfdate$ and the project completion date; late start time (L_START) is computed as $L_FINISH - dur$. The late finish time (L_FINISH) for each of the other activities in the network is computed as the minimum of its $maxfdate$ and the L_START times of all its successors.

It is important to remember that the precedence constraints of the network are always respected (for these first six alignment types). Thus, it is possible that an activity that has an alignment constraint of the type SEQ, constraining it to start on a particular date, say d , may not start on the specified date d due to its predecessors not being finished before d . During resource-constrained scheduling, a further slippage in the start date could occur due to insufficient resources. In other words, *the precedence constraints and resource constraints have priority over the time constraints* (as imposed by the ALIGNDATE and ALIGNTYPE statements) in the determination of the schedule of the activities in the network.

The last two alignment types, MS and MF, however, specify *mandatory dates* for the start and finish times of the activities for both the early and late start schedules. These alignment types can be used to schedule activities to start or finish on a given date disregarding precedence and resource constraints. Thus, an activity with the ALIGNTYPE variable's value equal to MS and the ALIGNDATE variable's value equal to d is scheduled to start on d (for the early, late, and resource-constrained schedules) irrespective of whether or not its predecessors are finished or whether or not there are enough resources.

Note that it is possible for the L_START time of an activity to be less than its E_START time if there are constraints on the start times of certain activities in the network (or constraints on the finish times of some successor activities) that make the target completion date infeasible. In such cases, some of the activities in the network have negative values for T_FLOAT, indicating that these activities are supercritical. See [Example 2.12](#), “Activity Time Constraints,” for a demonstration of this situation.

Finish Milestones

By default, the start and finish times for the different schedules computed by PROC CPM denote the first and last *day* of work, respectively, when the values are formatted as SAS *date* values. All start times are assumed to denote the beginning of the day and all finish times are assumed to correspond to the end of the day. If the times are SAS *time* or *datetime* values, they denote the first and last *second* of work, respectively. However, for zero duration activities, *both* the start and the finish times correspond to the beginning of the date (or second) specified.

Thus, according to the preceding definitions, the CPM procedure assumes that all milestones are scheduled at the *beginning* of the day indicated by their start times. In other words, the milestones can be regarded as *start* milestones since they correspond to the *beginning* of the time period indicated by their scheduled times.

However, in some situations, you may want to treat the milestones as *finish* milestones.

Consider the following example:

Activity ‘A’ has a 2-day duration and is followed by a milestone (zero duration) activity, ‘B’. Suppose that activity ‘A’ starts on March 15, 2004. The default calculations by the CPM procedure will produce the following schedule for the two activities:

OBS	Activity	Duration	E_START	E_FINISH
1	A	2	15MAR2004	16MAR2004
2	B	0	17Mar2004	17MAR2004

The start and finish times of the milestone activity, ‘B’, are interpreted as the beginning of March 17, 2004. In some situations, you may want the milestones to start and finish on the same day as their predecessors. For instance, in this example, you may want the start and finish time of activity ‘B’ to be set to March 16, 2004, with the

interpretation that the time corresponds to the *end* of the day. Such milestones will be referred to as *finish milestones*.

The SETFINISHMILESTONE option in the PROC CPM statement indicates that a milestone that is linked to its predecessor by a *Finish-to-Start* or a *Finish-to-Finish* precedence constraint should be treated as a *finish milestone*. In other words, such a milestone should have the start and finish time set to the *end* of the day that the predecessor activity finishes. There are some exceptions to this rule:

- There is an alignment constraint on activity ‘B’ that requires the milestone to start on a later day than the date dictated by the precedence constraint.
- Activity ‘B’ has an actual start or finish time specified that is inconsistent with the predecessor’s finish date.

Note that the alignment constraint that affects the early schedule of the project may not have any impact on the late schedule. Thus, a milestone may be treated as a finish milestone for the late schedule even if it is not a finish milestone according to the early schedule. See [Example 2.28](#) for an illustration of this situation. In addition, while computing the resource-constrained schedule, a start milestone (according to the early schedule) may in fact turn out to be a finish milestone according to the resource-constrained schedule.

Since the same milestone could be treated as either a start or a finish milestone depending on the presence or absence of an alignment constraint, or depending on the type of the schedule (early, late, resource-constrained, or actual), the CPM procedure adds extra variables to the Schedule data set corresponding to each type of schedule. These variables, EFINMILE, LFINMILE, SFINMILE, and AFINMILE, indicate for each milestone activity in the project whether the corresponding schedule times (early, late, resource-constrained, or actual) are to be interpreted as finish milestone times. These variables have a value of ‘1’ if the milestone is treated as a finish milestone for the corresponding schedule; otherwise, the value is missing. In addition to providing an unambiguous interpretation for the schedule times of the milestones, these variables are useful in plotting the schedules correctly using the Gantt procedure. (See [Example 2.28](#)).

OUT= Schedule Data Set

The Schedule data set always contains the variables in the Activity data set that are listed in the [TAILNODE](#), [HEADNODE](#), [ACTIVITY](#), [SUCCESSOR](#), [DURATION](#), and [ID](#) statements. If the INTPER= option is specified in the PROC CPM statement, then the values of the DURATION variable in the Schedule data set are obtained by multiplying the corresponding values in the Activity data set by *intper*. Thus, the values in the Schedule data set are the durations used by PROC CPM to compute the schedule. If the procedure is used without specifying a RESOURCEIN= data set and only the unconstrained schedule is obtained, then the Schedule data set contains six new variables named E_START, L_START, E_FINISH, L_FINISH, T_FLOAT, and F_FLOAT.

If a resource-constrained schedule is obtained, however, the Schedule data set contains two new variables named S_START and S_FINISH; the T_FLOAT and F_FLOAT variables are omitted. You can request the omission of the E_START and E_FINISH variables by specifying NOE_START and the omission of the L_START and L_FINISH variables by specifying NOL_START in the **RESOURCE** statement. The variables listed in the **RESOURCE** statement are also included in the Schedule data set; to omit them, use the NORESOURCEVARS option in the **RESOURCE** statement. If the DELAYANALYSIS option is specified, the Schedule data set also includes the variables R_DELAY, DELAY_R and SUPPL_R.

If resource-driven durations or resource calendars are in effect, the start and finish times shown in the Schedule data set are computed as the minimum of the start times for all resources for that activity and the maximum of the finish times for all resources for that activity, respectively. For details see the “[Resource-Driven Durations and Resource Calendars](#)” section on page 108.

If an **ACTUAL** statement is specified, the Schedule data set also contains the four variables A_START, A_FINISH, A_DUR, and STATUS.

The format of the schedule variables in this data set (namely, A_START, A_FINISH, E_START, E_FINISH, L_START, and so on) is consistent with the format of the DATE= specification and the INTERVAL= option in the PROC CPM statement.

Definitions of Variables in the OUT= Data Set

Each observation in the Schedule data set is associated with an activity. The variables in the data set have the following meanings.

A_DUR

specifies the actual duration of the activity. This variable is included in the Schedule data set only if the **ACTUAL** statement is used. The value for this variable is missing unless the activity is completed and may be different from the duration of the activity as specified by the DURATION variable. It is based on the values of the progress variables. See the “[Progress Updating](#)” section on page 105 for further details.

A_FINISH

specifies the actual finish time of the activity, either as specified in the Activity data set or as computed by PROC CPM on the basis of the progress variables specified. This variable is included in the Schedule data set only if the **ACTUAL** statement is used.

A_START

specifies the actual start time of the activity, either as specified in the Activity data set or as computed by PROC CPM on the basis of the progress variables specified. This variable is included in the Schedule data set only if the **ACTUAL** statement is used.

E_FINISH

specifies the completion time if the activity is started at the early start time.

E_START

specifies the earliest time the activity can be started. This is the maximum of the

maximum early finish time of all predecessor activities and any lower bound placed on the start time of this activity by the alignment constraints.

F_FLOAT

specifies the free float time, which is the difference between the early finish time of the activity and the minimum early start time of the activity's immediate successors. Consequently, it is the maximum delay that can be tolerated in the activity without affecting the scheduling of a successor activity. The values of this variable are calculated in units of the INTERVAL= parameter.

L_FINISH

specifies the latest completion time of the activity. This is the minimum of the *minimum* late start time of all successor activities and any upper bound placed on the finish time of the activity by the alignment constraints.

L_START

specifies the latest time the activity can be started. This is computed from the activity's latest finish time.

S_FINISH

specifies the resource-constrained finish time of the activity. If resources are insufficient and the procedure cannot schedule the activity, the value is set to missing, unless the FILLUNSCHEM option is specified.

S_START

specifies the resource-constrained start time of the activity. If resources are insufficient and the procedure cannot schedule the activity, the value is set to missing, unless the FILLUNSCHEM option is specified.

STATUS

specifies the current status of the activity. This is a character valued variable. Possible values for the status of an activity are *Completed*, *In Progress*, *Infeasible* or *Pending*; the meanings are self-evident. If the project is scheduled subject to resource constraints, activities that are *Pending* are classified as *Pending* or *Infeasible* depending on whether or not PROC CPM is able to determine a resource-constrained schedule for the activity.

T_FLOAT

specifies the total float time, which is the difference between the activity late finish time and early finish time. Consequently, it is the maximum delay that can be tolerated in performing the activity and still complete the project on schedule. An activity is said to be on the critical path if T_FLOAT=0. The values of this variable are calculated in units of the INTERVAL= parameter.

If activity splitting is allowed during resource-constrained scheduling, the Schedule data set may contain more than one observation corresponding to each observation in the Activity data set. It will also contain the variable SEGMENT_NO, which is explained in the “[Activity Splitting](#)” section on page 118.

If the PROJECT statement is used, some additional variables are added to the output data set. See the “[Schedule Data Set](#)” section on page 131 for details.

Multiple Calendars

Work pertaining to a given activity is assumed to be done according to a particular *calendar*. A calendar is defined here in terms of a work pattern for each day and a work week structure for each week. In addition, each calendar may have holidays during a given year.

You can associate calendars with Activities (using the **CALID** variable in the **Activity** data set) or Resources (using observations with the keyword 'CALENDAR' for the **OBSTYPE** variable in the Resource data set).

PROC CPM enables you to define very general calendars using the **WORKDATA**, **CALEDATA**, and **HOLIDATA** data sets and options in the PROC CPM statement. Recall that these data sets are referred to as the Workday, Calendar, and Holiday data sets, respectively. The Workday data set specifies distinct shift patterns during a day. The Calendar data set specifies a typical work week for any given calendar; for each day of a typical week, it specifies the shift pattern that is followed. The Holiday data set specifies a list of holidays and the calendars that they refer to; holidays are defined either by specifying the start of the holiday and its duration in *interval* units, or by specifying the start and end of the holiday period. The Activity data set (the **DATA=** input data set) then specifies the calendar that is used by each activity in the project through the **CALID** variable (or a default variable **_CAL_**). Each of the three data sets used to define calendars is described in greater detail later in this section.

Each new value for the **CALID** variable in either the Calendar data set or the Holiday data set defines a new calendar. If a calendar value appears in the Calendar data set and not in the Holiday data set, it is assumed to have the same holidays as the default calendar (the default calendar is defined later in this section). If a calendar value appears in the Holiday data set and not in the Calendar data set, it is assumed to have the same work pattern structures (for each week and within each day) as the default calendar. In the Activity data set, valid values for the **CALID** variable are those that are defined in either the Calendar data set or the Holiday data set.

Cautions

The Holiday, Calendar, and Workday data sets and the processing of holidays and different calendars are supported only when *interval* is **DAY**, **WEEKDAY**, **DTDAY**, **WORKDAY**, **DTWRKDAY**, **DTHOUR**, **DTMINUTE**, or **DTSECOND**. PROC CPM uses default specifications whenever some information required to define a calendar is missing or invalid. The defaults have been chosen to provide consistency among different types of specifications and to correct for errors in input, while maintaining compatibility with earlier versions of PROC CPM. You get a wide range of control over the calendar specifications, from letting PROC CPM define a single calendar entirely from defaults, to defining several calendars of your choice with precisely defined work patterns for each day of the week and for each week. If the Calendar, Workday, and Holiday data sets are used along with multiple calendar specifications, it is important to remember how all of the data sets and the various options interact to form the work patterns for the different calendars.

Default Calendar

The default calendar is a special calendar that is defined by PROC CPM; its definition and uses are explained in this subsection.

If there is no CALID variable and no Calendar and Workday data sets, the default calendar is defined by *interval* and the DAYSTART= and DAYLENGTH= options in the PROC CPM statement. If *interval* is DAY, DTDAY, DTHOUR, DTMINUTE or DTSECOND, work is done on all seven days of the week; otherwise, Saturday and Sunday are considered to be non-working days. Further, if the schedule is computed as SAS datetime values, the length of the working day is determined by *daystart* and *daylength*. All of the holidays specified in the Holiday data set refer to this default calendar, and all of the activities in the project follow it. Thus, if there is no CALID variable, the default calendar is the only calendar that is used for all of the activities in the project.

If there is a CALID variable that identifies distinct calendars, you can use an observation in the Calendar data set to define the work week structure for the default calendar. Use the value '0' (if CALID is a numeric variable) or the value 'DEFAULT' (if CALID is a character variable) to identify the default calendar. In the absence of such an observation, the default calendar is defined by *interval*, *daystart*, and *daylength*, as described earlier. The default calendar is used to substitute default work patterns for missing values in the Calendar data set or to set default work week structures for newly defined calendars in the Holiday data set.

WORKDATA Data Set

All numeric variables in the Workday data set are assumed to denote unique shift patterns during one working day. For each variable the observations specify, alternately, the times when consecutive shifts start and end. Suppose S1, S2, and S3 are numeric variables formatted as TIME6. Consider the following Workday data:

	S1	S2	S3	
	7:00	.	7:00	(start)
	11:00	08:00	11:00	(end)
	12:00	.	.	(start)
	16:00	.	.	(end)

The variables S1, S2, and S3 define three different work patterns. A missing value in the first observation is assumed to be 0 (or 12:00 midnight); a missing value in any other observation is assumed to denote 24:00 and ends the definition of the shift. Thus, the workdays defined are:

- S1 defines a workday starting at 7:00 a.m. and continuing until 4:00 p.m. with an hour off for lunch from 11:00 a.m. until 12:00 noon.
- S2 defines a workday from midnight to 8:00 a.m.
- S3 defines a workday from 7:00 a.m. to 11:00 a.m.

The last two values for the variables S2 and S3 (both values are '24:00', by default) are ignored. This data set can be used to define all of the unique shift patterns that occur in any of the calendars in the project. These shift patterns are tied to the different calendars in which they occur using the Calendar data set.

CALEDATA Data Set

The Calendar data set defines specific calendars using the names of the shift variables in the Workday data set. You can use the variable specified in the `CALID` statement or a variable named `_CAL_` to identify the calendar name or number. Character variables named `_SUN_`, `_MON_`, `_TUE_`, `_WED_`, `_THU_`, `_FRI_`, and `_SAT_` are used to indicate the work pattern that is followed on each day of the week. Valid values for these variables are 'HOLIDAY', 'WORKDAY' or, any shift variable name defined in the Workday data set.

Note: A missing value for any of these variables is assumed to denote that the work pattern for the corresponding day is the same as for the default calendar.

When *interval* is specified as `DTDAY`, `WORKDAY`, or `DTWRKDAY`, it is necessary to know the length of a *standard* working day in order to be able to compute the schedules consistently. For example, a given calendar may have an eight-hour day on Monday, Tuesday, and Wednesday and a seven-hour day on Thursday and Friday. If a given activity following that calendar has a duration of four days, does it mean that its duration is equal to $8 \times 4 = 32$ hours or $7 \times 4 = 28$ hours? To avoid ambiguity, a numeric variable named `D_LENGTH` can be specified in the Calendar data set to define the length of a standard working day for the specified calendar. If this variable is not found in the Calendar data set, all calendars for the project are assumed to have a standard daylength as defined by the default calendar.

For example, consider the following Calendar data:

<code>_CAL_</code>	<code>_SUN_</code>	<code>_MON_</code>	<code>_TUE_</code>	<code>_FRI_</code>	<code>_SAT_</code>	<code>D_LENGTH</code>
1	HOLIDAY	S1	S1	S2	S3	8:00
2	HOLIDAY	.	.	.	HOLIDAY	.
3	.	.	.	.	.	.

These three observations define three calendars: '1', '2', and '3'. The values 'S1', 'S2', and 'S3' refer to the shift variables defined in the "[WORKDATA Data Set](#)" section on page 99. Activities in the project can follow either of these three calendars or the default calendar.

Suppose *daystart* has been specified as 9:00 a.m. and *daylength* is eight hours. Further, suppose that *interval* is `DTDAY`. Using these parameter specifications, PROC CPM defines the default calendar and calendars 1, 2 and 3 using the Calendar data set just defined:

- The default calendar (not specified explicitly in the Calendar data set) is defined using *interval*, *daystart*, and *daylength*. It follows a seven-day week with each day being an eight-hour day (from 9:00 a.m. to 5:00 p.m.). Recall that the

default calendar is defined to have seven or five working days depending on whether *interval* is DTDAY or WORKDAY, respectively.

- Calendar '1' (defined in observation 1) has a holiday on Sunday; on Monday and Tuesday work is done from 7:00 a.m. to 11:00 a.m. and then from 12:00 noon to 4:00 p.m.; work on Friday is done from 12:00 (midnight) to 8:00 a.m.; work on Saturday is done from 7:00 a.m. to 11:00 a.m.; on other days work is done from 9:00 a.m. to 5:00 p.m., as defined by the default calendar. The value of D_LENGTH specifies the number of hours in a standard work day; when durations of activities are specified in terms of number of workdays, then the value of D_LENGTH is used as a multiplier to convert workdays to the appropriate number of hours.
- Calendar '2' (defined in observation 2) has holidays on Saturday and Sunday, and on the remaining days, it follows the standard working day as defined by the default calendar.
- Calendar '3' (defined in observation 3) follows the same definition as the default calendar.

Note: If there are multiple observations in the Calendar data set identifying the same calendar, all except the first occurrence are ignored. The value '0' (if CALID is a numeric variable) or the value 'DEFAULT' (if CALID is a character variable) refers to the default calendar. A missing value for the CALID variable is also assumed to refer to the default calendar. Note that the Calendar data set can be used to define the default calendar also.

HOLIDATA Data Set

The HOLIDATA data set (referred to as the Holiday data set) defines holidays for the different calendars that may be used in the project. Holidays are specified by using the HOLIDAY statement. See the HOLIDAY statement earlier in this chapter for a description of the syntax. This data set must contain a variable (the HOLIDAY variable) whose values specify the start of each holiday. Optionally, the data set may also contain a variable (the HOLIDUR variable) used to specify the length of each holiday or another variable (the HOLIFIN variable) specifying the finish time of each holiday. The variable specified by the CALID statement (or a variable named _CAL_) can be used in this data set to identify the calendar to which each holiday refers. A missing value for the HOLIDAY variable in an observation causes that observation to be ignored. If both the HOLIDUR and the HOLIFIN variables have missing values in a given observation, the holiday is assumed to start at the date and time specified for the HOLIDAY variable and last one unit of *interval* where the INTERVAL= option has been specified as *interval*. If a given observation has valid values for both the HOLIDUR and HOLIFIN variables, only the HOLIFIN variable is used so that the holiday is assumed to start and end as specified by the HOLIDAY and HOLIFIN variables, respectively. A missing value for the CALID variable causes the holiday to be included in all of the calendars, including the default.

The HOLIDUR variable is a natural way of expressing vacation times as *n workdays*, and the HOLIFIN variable is more useful for defining standard holiday periods, such as the CHRISTMAS holiday from 24DEC03 to 26DEC03 (both days inclusive). Note

that the HOLIDUR variable is assumed to be in units of *interval* and the procedure uses the particular work pattern structure for the given calendar to compute the length (finish time) of the holiday.

For example, consider the following Holiday data:

HOLISTA	HOLIDUR	HOLIFIN	_CAL_
24DEC03	.	26DEC03	.
01JAN04	1	.	1
19JAN04	.	.	2
29JAN04	3	.	2
29JAN04	3	.	3

Suppose calendars ‘1’, ‘2’, and ‘3’ and the default calendar have been defined as described earlier in the description of the Calendar and Workday data sets. Recall that in this example INTERVAL=DTDAY, DAYSTART=‘09:00’T, and DAYLENGTH=‘08:00’T. Because the schedule is computed as SAS datetime values (since INTERVAL=DTDAY), the holiday values (specified here as SAS date values) are converted to SAS datetime values. The first observation in the Holiday data set has a missing value for _CAL_ and, hence, the holiday in this observation pertains to all the calendars. As defined by the Holiday data, the holiday lists for the different calendars (not including breaks due to shift definitions) are as shown in [Table 2.23](#).

Note that, even though both calendars ‘2’ and ‘3’ have the same specifications for HOLISTA and HOLIDUR, the actual holiday periods are different for the two calendars. For calendar ‘2’, the three days starting from Thursday, January 29, imply that the holidays are on Thursday, Friday, and Monday (because Saturday and Sunday are already holidays). For calendar ‘3’ (all seven days are working days), the holidays are on Thursday, Friday, and Saturday.

Table 2.23. Holiday Definitions

Calendar	Holiday Start	Holiday End
0	24DEC03:09:00	26DEC03:16:59:59
1	24DEC03:09:00	26DEC03:07:59:59
	01JAN04:00:00	01JAN04:07:59:59
2	24DEC03:09:00	26DEC03:16:59:59
	19JAN04:09:00	19JAN04:16:59:59
	29JAN04:09:00	02FEB04:16:59:59
3	24DEC03:09:00	26DEC03:16:59:59
	29JAN04:09:00	31JAN04:16:59:59

You can use the GANTT procedure to visualize the breaks and holidays for the different calendar. [Figure 2.4](#) shows all the breaks and holidays for the period between Christmas and New Year. Holidays and breaks are denoted by *. Likewise, [Figure 2.5](#) shows the vacation periods in January for calendars ‘2’ and ‘3’.

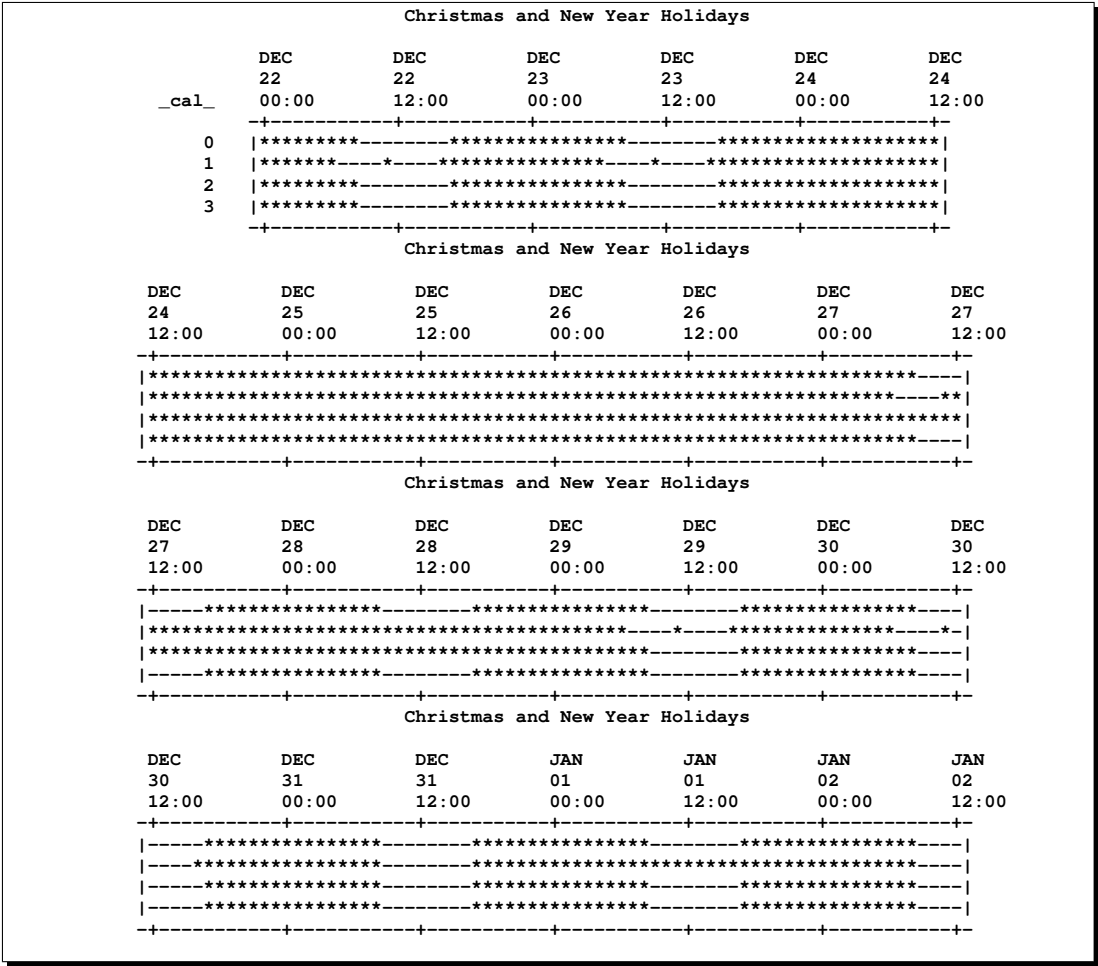


Figure 2.4. Christmas and New Year Holidays for Multiple Calendars

Vacation Times for Calendars 2 and 3							
cal	JAN 18 00:00	JAN 18 12:00	JAN 19 00:00	JAN 19 12:00	JAN 20 00:00	JAN 20 12:00	JAN 21 00:00
2	|*****|						
3	|*****|						
Vacation Times for Calendars 2 and 3							
	JAN 21 00:00	JAN 21 12:00	JAN 22 00:00	JAN 22 12:00	JAN 23 00:00	JAN 23 12:00	JAN 24 00:00

Vacation Times for Calendars 2 and 3							
	JAN 24 12:00	JAN 25 00:00	JAN 25 12:00	JAN 26 00:00	JAN 26 12:00	JAN 27 00:00	JAN 27 12:00

Vacation Times for Calendars 2 and 3							
	JAN 28 00:00	JAN 28 12:00	JAN 29 00:00	JAN 29 12:00	JAN 30 00:00	JAN 30 12:00	JAN 31 00:00

Vacation Times for Calendars 2 and 3							
	JAN 31 12:00	FEB 01 00:00	FEB 01 12:00	FEB 02 00:00	FEB 02 12:00	FEB 03 00:00	FEB 03 12:00

Figure 2.5. Vacation Time for Calendars 2 and 3

Baseline and Target Schedules

An important aspect of project management is to examine the effects of changing some of the parameters of the project on project completion time. For example, you may want to examine different scenarios by changing the durations of some of the activities, or increasing or decreasing the resource levels. To see the effect of these changes, you need to compare the schedules corresponding to the changes. The **BASELINE** statement enables you to save a particular schedule as a target schedule and then compare a new schedule against that. See the “**BASELINE Statement**” section on page 69 for a description of the syntax.

Progress Updating

Once a project has been defined with all of its activities and their relationships, the durations, the resources needed, and so on, it is often useful to monitor its progress periodically. During resource-constrained scheduling, it is useful to schedule only activities that have not yet started, taking into consideration the activities that have already been completed or scheduled and the resources that have already been used by them or allotted for them. The **ACTUAL** statement is used in PROC CPM to convey information about the current status of a project. As information about the activities becomes available, it can be incorporated into the schedule of the project through the specification of the actual start or finish times or both, the duration that is still remaining for the activity, or the percentage of work that has been completed on an activity. The specification of the progress variables and the options in the **ACTUAL** statement have been described earlier in this chapter. This section describes how the options work together and how some default values are determined.

The following options are discussed in this section:

- the TIMENOW= option
- the AUTOUPDT and NOAUTOUPDT options
- the TIMENOWSPLT option
- the progress variables (A_START, A_FINISH, REMDUR, and PCTCOMP)

The TIMENOW= option is specified in the **ACTUAL** statement. The value of the TIMENOW= option (often referred to simply as TIMENOW) is used as a reference point to resolve the values of the remaining duration and percent completion times. All actual start and finish times specified are checked to ensure that they are less than TIMENOW. If there is some inconsistency, a warning message is printed to the log.

If the **ACTUAL** statement is used, at least one of the four progress variables must be specified. PROC CPM uses the nonmissing values for the progress variables in any given observation to determine the information that is to be used for the activity. It is possible that there are some inconsistencies in the specification of the values relating to the progress information. For example, an activity may have valid values for both the A_START and the A_FINISH variables and also have the value of the PCTCOMP variable less than 100. PROC CPM looks at the values in a specific order, resolving inconsistencies in a reasonable manner. Further, PROC CPM determines revised estimates of the durations of the activities on the basis of the actual information.

Suppose that for a given activity, *as* is the actual start, *af* is the actual finish, *remdur* is the remaining duration, *pctc* is the percent complete, and *dur* is the duration of the activity as specified by the values of the corresponding variables in the Activity data set. (If a particular variable is not specified, assume that the corresponding value is missing.)

The *elapsed duration* of an activity in progress is the time lapse between its actual start and TIMENOW; the *revised duration* of the activity is the *updated duration* of the activity that is used to calculate the projected finish time for activities in progress

and the *actual duration* for activities that are completed. The *revised duration* is used by PROC CPM to compute the updated schedule as described later in this section. In the discussion that follows, *as*, *af*, *remdur*, and *pctc* refer to the *actual start time*, *actual finish time*, *remaining duration*, and *percent completed*, respectively, for the activity in the Activity data set, while A_START, A_FINISH, and A_DUR refer to the values calculated by PROC CPM for the corresponding new variables added to the Schedule data set.

The following is a list of some of the conventions used by PROC CPM in calculating the *revised duration*:

- If both *as* and *af* are specified, the *revised duration* is computed as the time, excluding non-working periods, between *as* and *af*; in the Schedule data set, the variable A_DUR is also set to this value; A_START is set to *as* and A_FINISH to *af*.
- If *as* is specified without *af*, PROC CPM uses *remdur* to compute the *revised duration* as the sum of the elapsed duration and the remaining duration.
- If *as* is specified and both *af* and *remdur* are missing, the *revised duration* is computed on the basis of the elapsed duration and *pctc*.
- If *as* is specified and *af*, *remdur* and *pctc* are not specified, the duration is not revised. If the time lapse between *as* and TIMENOW is greater than or equal to the duration of the activity, it is assumed to have finished at the appropriate time ($as + dur$) and the Schedule data set has the appropriate values for A_START, A_FINISH, and A_DUR.
- If *as* is missing and *af* is valid, PROC CPM determines *as* on the basis of *af* and the specified duration (*remdur* and *pctc*, if specified, are ignored.)
- If *as* and *af* are both missing, the *revised duration* is determined on the basis of *remdur* and *pctc*. If the activity has started (if $pctc > 0$ or $remdur < dur$), *as* is set appropriately, and if it has also finished (which is the case if $pctc = 100$ or $remdur = 0$), *af* is also set.

Using the preceding rules, PROC CPM attempts to determine actual start and finish times for as many activities as possible using the information given for each activity. The next question is: What about activities that have missing values for the actual start and finish times? Suppose a given activity has a valid value for A_START and is currently in progress. It seems logical for successors of this activity to have missing values for A_START. But how about predecessors of the activity? If they have missing values for A_START and A_FINISH, does it mean that there was an error in the input of the actual dates or an error in the precedence constraints? The AUTOUPDT and NOAUTOUPDT options enable you to control the answer to this question. AUTOUPDT instructs CPM to automatically fill in appropriate A_START and A_FINISH values for all activities that precede activities which have already started. NOAUTOUPDT implies that only those activities that have explicit progress information confirming their status are assumed to be in progress or completed; all other activities are assumed to have an implicit start date that is greater than or equal

to TIMENOW. In other words, NOAUTOUPDT assumes that the precedence constraints may be overridden by the actual data. The default option is AUTOUPDT.

The scheduling algorithm treats the actual start and finish times as follows:

- If A_START is not missing, the E_START time is set equal to A_START during the forward pass, and the E_FINISH time is set equal to E_START + the *revised duration*.
- If A_START is missing, the E_START time is computed as before.
- If A_FINISH or A_START is not missing, the L_FINISH time is set equal to A_FINISH during the backward pass, and the L_START time is computed on the basis of L_FINISH and the *revised duration*. This rule causes the late start schedule to be the same as the early start schedule for completed or in-progress activities. Thus, T_FLOAT and F_FLOAT are 0 for such activities. Use the SHOWFLOAT option if you want to allow nonzero float for in-progress or completed activities. In this case, the late start schedule is computed as before, using the precedence constraints, so that you can determine the degree of lateness for the activities that have already been completed or are in progress.
- If E_START is less than TIMENOW for an activity (and thus it is also the same as A_START), the activity is scheduled during resource allocation even if there are not enough resources (a warning message is printed to the log if this is the case). Thus, resource-constrained scheduling is done only for the period starting from TIMENOW.

Note: The resources required by activities that are completed or in progress are accounted for and the corresponding changes are made to the resource availability profile before starting the constrained scheduling process at TIMENOW.

- If resource-constrained scheduling is being performed, the TIMENOWSPLT option can be used. This option affects those activities that are currently in progress that cause resource infeasibilities. The TIMENOWSPLT option causes such activities to be split at TIMENOW into segments; the first segment is assumed to be complete before TIMENOW, and the second segment is delayed until sufficient resources are available.

The Schedule data set contains the actual start times (A_START) for all activities that are in progress or completed and the actual finish times (A_FINISH) and the actual duration times (A_DUR) for all activities that are completed. Some of these values may have been derived from the percent completion or remaining duration times in the Activity data set or may have been implicitly determined through the AUTOUPDT option. Also included in the Schedule data set is a variable named STATUS describing the status of each activity. The possible values are *Completed*, *In Progress*, *Infeasible*, and *Pending*; the interpretations are self-evident.

If the [ESTPCTC](#) option is specified, the Schedule data set also contains a variable named PCT_COMP that contains the percent completion time for each activity in the project.

Resource-Driven Durations and Resource Calendars

The **DURATION** variable enables you to specify a fixed duration for an activity. The CPM procedure then assumes that all the resources for that activity are required throughout the duration of that activity; further, the activity is assumed to follow the work pattern specified by the activity's calendar. Suppose that there are multiple resources required by an activity, each following a different calendar and each requiring varying amounts of work. For example, a programming task may require 50 hours of a programmer's time and 20 hours of a tester's time. Further, the programmer may work full time on the tasks, while the tester, due to other commitments, may work only half time on the same activity. The scheduling could be further complicated if the tester and the programmer followed different calendars. Situations of this type can be modeled using resource-driven durations and resource calendars.

The **WORK** variable in the Activity data set specifies the *total* amount of work required by one unit of a resource. Unlike the **DURATION** variable, which represents a fixed duration for an activity for all its resources, the **WORK** variable *drives* the duration for each resource required by the activity using the resource rate specified. You can specify different amounts of work for different resources by using different observations to specify rates and total work for the different resources. Consider the following data from an Activity data set:

ACT	WORK	PGMR	TESTER
1	50	1	.
1	20	.	.5
2	15	1	1

PGMR and **TESTER** are resource variables specifying the rate at which the respective resource is required (used) for the particular activity; **WORK** specifies the total number of hours (assuming that the **INTERVAL** parameter has been specified as **HOURL**) of work required by each resource that has a rate specified in that observation. Thus, Activity '1' requires 50 hours of the resource **PGMR** and 20 hours of the resource **TESTER**, while activity '2' requires 15 hours of each of the two resources. Using the rates for the resources specified in the preceding data, the procedure determines the resource durations for activity 1 to be 50 hours for **PGMR** and 40 hours for **TESTER**. Likewise, the resource durations for both resources are 15 hours for activity 2.

In the forward and backward pass calculations, the procedure computes the schedules for each resource and sets the activity's start (finish) time to be the minimum (maximum) of the start (finish) times for all the resources.

Some activities may have a fixed duration for some resources and a resource-driven duration for other resources. For such activities, use the **DURATION** variable to specify the fixed duration and the **WORK** variable to specify the total amount of work required for the activity. If a particular observation has values specified for both the **WORK** and **DURATION** variables, use the resource type information in the Resource data set (described in the "**RESOURCEIN= Input Data Set**" section on page 109) to determine if the resource *drives* the duration of the activity.

Recall that the CALID variable in the Activity data set specifies the calendar that is used by each activity in the project. In addition, you can also associate calendars with the resources in the project. Resource calendars are specified in the Resource data set. However, the CALID variable must be numeric for you to associate calendars with resources; in other words, the calendars must be identified by numbers and not names.

Resource Usage and Allocation

Often the activities in a project use several resources. If you assume that these resources are available in unlimited quantities, then the only restrictions on the start and finish times of the activities in the project are those imposed by precedence constraints and dates specified for alignment of the activities. In most practical situations, however, there are limitations on the availability of resources; as a result, neither the early start schedule nor the late start schedule (nor any intermediate schedule for that matter) may be feasible. In such cases, the project manager is faced with the task of scheduling the activities in the project subject to constraints on resource availability in addition to the precedence constraints and constraints on the start and finish times of certain activities in the project. This problem is known as *resource allocation*.

You can use PROC CPM to schedule the activities in a project subject to resource constraints. To perform resource allocation, you must specify the resource requirements for each activity in the project and also specify the amount of resources available on each day under consideration. The resource requirements are given in the Activity data set, with the variable names identified to PROC CPM through the RESOURCE statement. The levels of resources available on different dates, as well as other information regarding the resources, such as the type of resource, the priority of the resource, and so forth, are obtained from the RESOURCEIN= data set.

Specifying resource requirements is described in detail in the “[Specifying Resource Requirements](#)” section on page 113, and the description of the format of the Resource data set is given in the “[RESOURCEIN= Input Data Set](#)” section on page 109, which follows. The “[Scheduling Method](#)” section on page 114 describes how you can use the SCHEDRULE= and DELAY= options (and other options) in conjunction with certain special observations in the Resource data set to control the process of resource allocation to suit your needs. Subsequent sections describe the different scheduling rules, supplementary resources, activity splitting, progress updating, and alternate resources.

RESOURCEIN= Input Data Set

The RESOURCEIN= data set (referred to as the Resource data set) contains all of the necessary information about the resources that are to be used by PROC CPM to schedule the project. Typically, the Resource data set contains the resource variables (numeric), a type identifier variable (character) that identifies the type of information in each observation, a period variable (numeric and usually a SAS time, date, or datetime variable), and a RESID variable that is used to specify *alternate resources* and *auxiliary resources*.

The value of the type identifier variable in each observation tells CPM how to interpret that observation. Valid values for this variable are RESLEVEL, RESTYPE,

RESUSAGE, RESPRTY, SUPLEVEL, ALTPRTY, ALTRATE, RESRCDUR, CALENDAR, MULTALT, MINARATE, and AUXRES. If the value of the type identifier variable in a particular observation is 'RESLEVEL', then that observation contains the levels available for each resource from the time specified in the period variable. Missing values are not allowed for the period variable in an observation containing the levels of the resources. Note that, for consumable resources, the observation indicates the *total availability* and *not the increase in the availability*. Likewise, for replenishable resources, the observation indicates the *new level* and *not the change in the level* of the resource.

Each resource can be classified as either consumable or replenishable. A consumable resource is one that is used up by the job (such as bricks or money), while a replenishable resource becomes available again once a job using it is over (such as manpower or machinery). If the value of the type identifier variable is 'RESTYPE', then that observation identifies the nature (consumable or replenishable) of the resource. The observation contains a value 1 for a replenishable resource and a value 2 for a consumable one. A missing value in this observation is treated as 1. In fact, if there is no observation in the Resource data set with the type identifier variable equal to 'RESTYPE', then all resources are assumed to be replenishable.

Sometimes, it may be useful to include resources in the project that are to be used only for aggregation purposes. You can indicate that a given resource is to be used for aggregation, and not for resource allocation, by specifying the values 3 or 4, depending on whether the resource is replenishable or consumable. In other words, use 3 for replenishable aggregate resources and 4 for consumable aggregate resources.

Consumable resources are assumed to be used continuously throughout the duration of the activity at the rate specified in the Activity data set (as described in the "Specifying Resource Requirements" section on page 113). For example, when you specify a rate of 100 per day for bricks, the CPM procedure assumes that the activity consumes bricks at the constant rate of 100 per day. Sometimes, you may wish to allocate all of the resource at the beginning or end of an activity. For example, you may pay an *advance* at the start of a contracted activity while the full *payment* is made when the activity is completed. You can indicate such a profile of usage for a consumable resource using the keyword 'RESUSAGE' for the value of the type identifier variable. Valid values for the resource variables in such an observation are 0, 1, and 2. A value 0 indicates that the resource is used continuously at the specified rate throughout the activity's duration, a value 1 indicates that the resource is required at the beginning of the activity, and a value 2 specifies that the resource is used at the end of the activity. A missing value in this observation is treated as 0.

One of the scheduling rules that can be specified using the SCHEDRULE= option is RESPRTY, which requires ordering the resources according to some priority (details are given in the "Scheduling Rules" section on page 116). If this option is used, there must be an observation in the Resource data set with the type identifier variable taking the value 'RESPRTY'. This observation specifies the ordering of the resources.

If the type identifier variable is given as 'SUPLEVEL', the observation denotes the amount of extra resource that is available for use throughout the duration of the project. This extra resource is used only if the activity cannot be scheduled with-

out delaying it beyond its late start time. See the “[Secondary Levels of Resources](#)” section on page 117 for details about the use of supplementary levels of resources in conjunction with the DELAY= and ACTDELAY= options.

If the type identifier variable is specified as ‘ALTRATE’, ‘ALTPRTY’, or ‘AUXRES’, the Resource data set must also have a RESID variable that is used to identify the name of a resource for which the current observation lists the possible alternate resources or the required auxiliary resources. See the “[Specifying Alternate Resources](#)” section on page 120 and the “[Auxiliary Resources](#)” section on page 123 for details.

If the value of the type identifier variable is ‘RESRCDUR’, that observation specifies the effect of the resource on an activity’s duration. Valid values for the resource variables in such an observation are 0, 1, and 2. A value 0 indicates that the resource uses a fixed duration (specified by the DURATION variable); in other words, the activity’s duration is not affected by changing the rate of the resource. A value 1 indicates that the WORK variable for an activity specifies the total amount of work required by the resource that is used to calculate the time required by the resource to complete its work on that activity; such a resource is referred to as a *driving* resource. The value 2 indicates a third type of resource; such a resource (referred to as a *spanning* resource) is required throughout the activity’s duration, no matter which resource is working on it. For example, an activity might require 10 percent of a “supervisor,” or the use of a particular room, throughout its duration. For such an activity, the duration used for the spanning resource is computed after determining the span of the activity for all the other resources.

If the value of the type identifier variable is ‘CALENDAR’, that observation specifies the calendar that is followed by each resource. If no calendar is specified for a given resource, the relevant activity’s calendar is used instead. Note that this use of the calendar requires that the calendar variable in the Activity and other data sets be numeric.

If the value of the type identifier variable is ‘MULTALT’, that observation indicates which resources can have multiple alternate resources. The value 1 for a resource variable in the observation indicates that multiple alternates are allowed for that resource, and a value 0 indicates that multiple alternates are not allowed. See the “[Specifying Multiple Alternates](#)” section on page 121 for details.

If the value of the type identifier variable is ‘MINARATE’, that observation indicates the minimum rate of substitution for each resource, whenever multiple alternates are used. Note that the ‘MINARATE’ values specified in this observation are used only if the [MULTIPLEALTERNATES](#) option is specified or if the Resource data set has an observation with the type identifier value of ‘MULTALT’.

The period variable must have nonmissing values for observations specifying the levels of the resources (that is, with type identifier equal to ‘RESLEVEL’). However, the period variable does not have any meaning when the type identifier variable has any value other than ‘RESLEVEL’; if the period variable has nonmissing values in these observations, it is ignored. The Resource data set must be sorted in order of *increasing* values of the period variable.

Multiple observations are allowed for each type of observation. If there is a conflict

in the values specified, only the first nonmissing value is honored; for example, if there are two observations of the type 'RESTYPE' and a resource variable has value 1 in the first and 2 in the second of these observations, the resource type is assumed to be 1 (replenishable). On the other hand, if the value is missing in the first observation but set to 2 in the second, the resource type is assumed to be 2 (consumable).

A resource is available at the specified level from the time given in the first observation with a nonmissing value for the resource. Its level changes (to the new value) whenever a new observation is encountered with a nonmissing value, and the date of change is the date specified in this observation.

The following examples illustrate the details about the Resource data set. Consider the following Resource data:

OBS	OBSTYPE	DATE	WORKERS	BRICKS	PAYMENT	ADVANCE
1	RESTYPE	.	1	2	2	2
2	RESUSAGE	.	.	0	2	1
3	RESPRTY	.	10	10	10	10
4	SUPELVEL	.	1	.	.	.
5	RESLEVEL	1JUL04	.	1000	2000	500
6	RESLEVEL	5JUL04	4	.	.	.
7	RESLEVEL	9JUL04	.	1500	.	.

There are four resources in these data, WORKERS, BRICKS, PAYMENT, and ADVANCE. The variable OBSTYPE is the type identifier, and the variable DATE is the period variable. The first observation (because OBSTYPE has value 'RESTYPE') indicates that WORKERS is a replenishable resource while the other three resources are consumable. The second observation indicates the usage profile for the consumable resources: the resource BRICKS is used continuously throughout the duration of an activity, while the resource PAYMENT is required at the end of the activity and the resource ADVANCE is needed at the start of the activity. The third observation indicates that all the resources have equal priority. In the fourth observation, a value '1' under WORKERS indicates that a supplementary level of 1 worker is available if necessary, while no reserve is available for the resources BRICKS, PAYMENT, and ADVANCE.

The next three observations indicate the resource availability profile. The resource WORKERS is unavailable until July 5, 2004, when the level jumps from 0 to 4 and remains at that level through the end of the project. The resource BRICKS is available from July 1, 2004, at level 1000, while the resource levels for PAYMENT, and ADVANCE are 2000 and 500, respectively. On July 9, an additional 500 bricks are made available to increase the total availability to 1500. Note that missing values in observations 5 and 6 indicate that there is no change in the availability for the respective resources.

As another example, suppose that you want to treat BRICKS as an aggregate resource (one that is not to be included in resource allocation). Then consider the following data from a Resource data set:

OBSTYPE	BRICKS	PAINTER	SUPERV
RESTYPE	4	1	1
RESRCDUR	0	1	2
CALENDAR	1	0	0

The first observation indicates that the resource **BRICKS** is consumable and is to be used only for aggregation while the other two resources are replenishable and are to be treated as constrained resources during resource allocation.

The second observation, with the keyword ‘**RESRCDUR**’, specifies the effect of the resource on an activity’s duration. The value ‘0’ for the resource **BRICKS** implies that this resource does not affect the duration of an activity. On the other hand, the value ‘1’ identifies the resource **PAINTER** as a driving resource; this means that by increasing the number of painters, an activity’s duration can be decreased. Note that the procedure uses this information about the nature of the resource only if a particular observation in the Activity data set has valid values for both the **WORK** and **DURATION** variables. Otherwise, if you specify a value only for the **WORK** variable, the procedure assumes that the resource specifications in that observation drive the activity’s duration. Likewise, if you specify a value only for the **DURATION** variable, the procedure assumes that the resources specified in that observation require a fixed duration.

In the Resource data set specifications, the second observation also identifies the resource **SUPERV** to be of the spanning type. In other words, such a resource is required by an activity whenever any of the other resources are working on the same activity. Thus, if you add more painters to an activity, thereby reducing its duration, the supervisor (a spanning resource) will be needed for a shorter time.

The third observation indicates the calendar to be used in calculating the activity’s start and finish times for the particular resource. If you do not specify a calendar, the procedure uses the activity’s calendar.

Specifying Resource Requirements

To perform resource allocation or to summarize the resource utilization, you must specify the amount of resources required by each activity. In this section, the format for this specification is described. The amount required by each activity for each of the resources listed in the **RESOURCE** statement is specified in the Activity data set. The requirements for each activity are assumed to be constant throughout the activity’s duration. A missing value for a resource variable in the Activity data set indicates that the particular resource is not required for the activity in that observation.

The interpretation of the specification depends on whether or not the resource is replenishable. Suppose that the value for a given resource variable in a particular observation is ‘x’. If the resource is *replenishable*, it indicates that x units of the resource are required throughout the duration of the activity specified in that observation. On the other hand, if the resource is *consumable*, it indicates that the specified resource is consumed at the rate of x units per unit *interval*, where *interval* is the value specified in the **INTERVAL=** option in the **PROC CPM** statement. For example, consider the following specification:

OBS	ACTIVITY	DUR	WORKERS	BRICKS
1	A	5	.	100
2	B	4	2	.

Here, **ACTIVITY** denotes the activity under consideration, **DUR** is the duration in days (assuming that **INTERVAL=DAY**), and the resource variables are **WORKERS** and **BRICKS**. A missing value for **WORKERS** in observation 1 indicates that activity ‘A’ does not need the resource **WORKERS**, while the same is true for the resource **BRICKS** and activity ‘B’. You can assume that the resource **WORKERS** has been identified as replenishable, and the resource **BRICKS** has been identified as consumable in a Resource data set. Thus, a value ‘100’ for the consumable resource **BRICKS** indicates that 100 bricks per day are required for each of the 5 days of the duration of activity ‘A’, and a value ‘2’ for the replenishable resource **WORKERS** indicates that 2 workers are required throughout the duration (4 days) of activity ‘B’. Recall that consumable resources can be further identified as having a special usage profile, indicating that the requirement is only at the beginning or end of an activity. See the “[Variable Usage Profile for Consumable Resources](#)” section on page 127 for details.

Negative Resource Requirements

The CPM procedure enables you to specify negative resource requirements. A negative requirement indicates that a resource is *produced* instead of *consumed*. Typically, this interpretation is valid only for consumable resources. For example, a brick-making machine may produce bricks at the rate of 1000 units per hour which are then available for consumption by other tasks in the project. To indicate that a resource is produced (and not consumed) by an activity, specify the rate of usage for the resource as a negative number. For example, to indicate that a machine produces boxed cards at the rate of 5000 boxes per day, set the value of the resource, **NUMBOXES**, to -5000.

Scheduling Method

PROC CPM uses the serial-parallel (serial in time and parallel in activities) method of scheduling. In this section, the basic scheduling algorithm is described. (Modifications to the algorithm if an **ACTUAL** statement is used, if activity splitting is allowed, or if alternate resources are specified, are described later.) The basic algorithm proceeds through the following steps:

1. An initial tentative schedule describing the early and late start and finish times is determined without taking any resource constraints into account. This schedule does, however, reflect any restrictions placed on the start and finish times by the use of the **ALIGNDATE** and **ALIGNTYPE** statements. As much as possible, PROC CPM tries to schedule each activity to start at its **E_START** time (*e_start*, as calculated in this step). Set $time = \min(e_start)$, where the minimum is taken over all the activities in the network.
2. All of the activities whose *e_start* values coincide with *time* are arranged in a waiting list that is sorted according to the rule specified in the **SCHEDRULE=**

option. (See the “Scheduling Rules” section on page 116 for details on the valid values of this option.) The SCHEDRULE2= option can be used to break ties. PROC CPM tries to schedule the activities in the same order as on this list. For each activity the procedure checks to see if the required amount of each resource will be available throughout the activity’s duration; if enough resources are available, the activity is scheduled to start at *time*. Otherwise, the resource availability profile is examined to see if there is likely to be an increase in resources in the future. If none is perceived until $l_start + delay$, the procedure tries to schedule the activity to start at *time* using supplementary levels of the resources (if there is an observation in the Resource data set specifying supplementary levels of resources); otherwise, it is postponed. (Note that if the AWAITDELAY option is specified, and there are not enough resources at *time*, the activity is not scheduled at *time* using supplementary resources). If *time* is equal to or greater than the value of $l_start + delay$, and the activity cannot be scheduled (even using supplementary resources), PROC CPM stops with an error message, giving a partial schedule. You can also specify a cut-off date (using the STOPDATE= option) when resource constrained scheduling is to stop.

Note that once an activity that uses a supplementary level of a replenishable resource is over, the supplementary level that was used is returned to the reservoir and is not used again until needed. For consumable resources, if supplementary levels were used on a particular date, PROC CPM attempts to bring the reservoir back to the original level at the earliest possible time. In other words, the next time the primary availability of the resource increases, the reservoir is first used to replenish the supplementary level of the resource. (See [Example 2.16](#), “Using Supplementary Resources”). Adjustment is made to the resource availability profile to account for any activity that is scheduled to start at *time*.

3. All of the activities in the waiting list that were unable to be scheduled in Step 2 are postponed and are tentatively scheduled to start at the time when the next change takes place in the resource availability profile (that is, their *e_start* is set to the next change date in the availability of resources). *time* is advanced to the minimum *e_start* time of all unscheduled activities.

Steps 1, 2, and 3 are repeated until all activities are scheduled or the procedure stops with an error message.

Some important points to keep in mind are:

- Holidays and other non-working times are automatically accounted for in the process of resource allocation. Do not specify zero availabilities for the resources on holidays; PROC CPM accounts for holidays and weekends during resource allocation just as in the unrestricted case.
- It is assumed that the activities cannot be interrupted once they are started, unless one of the splitting options is used. See the “Activity Splitting” section on page 118 for details.

Scheduling Rules

The SCHEDRULE= option specifies the criterion to use for determining the order in which activities are to be considered while scheduling them subject to resource constraints. As described in the “Scheduling Method” section on page 114, at a given time specified by *time*, all activities whose tentative *e_start* coincides with *time* are arranged in a list ordered according to the scheduling rule, *schedrule*. The SCHEDRULE2= option can be used to break ties caused by the SCHEDRULE= option; valid values for *schedrule2* are the same as for *schedrule*. However, if *schedrule* is ACTPRTY, then *schedrule2* cannot be RESPRTY, and vice versa.

The following is a list of the six valid values of *schedrule*, along with a brief description of their respective effects.

ACTPRTY

specifies that PROC CPM should sort the activities in the waiting list in the order of increasing values of the variable specified in the ACTIVITYPRTY= option in the RESOURCE statement. This variable specifies a user-assigned priority to each activity in the project (low value of the variable indicates high priority).

Note: If SCHEDRULE is specified as ACTPRTY, the RESOURCE statement must contain the specification of the variable in the Activity data set that assigns priorities to the activities; if the variable name is not specified through the ACTIVITYPRTY= option, then CPM ignores the specification for the SCHEDRULE= option and uses the default scheduling rule, LST, instead.

DELAYLST

specifies that the activities in the waiting list are sorted in the order of increasing $L_START + ACTDELAY$, where ACTDELAY is the value of the ACTDELAY variable for that activity.

LFT

specifies that the activities in the waiting list are sorted in the order of increasing L_FINISH time.

LST

specifies that the activities in the waiting list are sorted in the order of increasing L_START time. Thus, this option causes activities that are closer to being critical to be scheduled first. This is the default rule.

RESPRTY

specifies that PROC CPM should sort the activities in the waiting list in the order of increasing values of the *resource priority* for the most important resource used by each activity. In order for this scheduling rule to be valid, there must be an observation in the Resource data set identified by the value RESPRTY for the type identifier variable and specifying priorities for the resources. PROC CPM uses these priority values (once again, low values indicate high priority) to order the activities; then, the activities in the waiting list are ordered according to the highest priority resource used by them. In other words, the CPM procedure uses the resource priorities to assign priorities to the activities in the project; these activity priorities are then used to order the activities in the waiting list (in increasing order). If this option is specified, and there is no observation in the Resource data set specifying the resource priorities,

PROC CPM ignores the specification for the SCHEDRULE= option and uses the default scheduling rule, LST, instead.

SHORTDUR

specifies that the activities in the waiting list are sorted in the order of increasing durations. Thus, PROC CPM tries to schedule activities with shorter durations first.

Secondary Levels of Resources

There are two factors that you can use to control the process of scheduling subject to resource constraints: *time* and *resources*. In some applications, time is the most important factor, and you may be willing to use extra resources in order to meet project deadlines; in other applications, you may be willing to delay the project completion by an arbitrary amount of time if insufficient resources warrant doing so. The DELAY= and ACTDELAY= options and the availability of supplementary resources enable you to choose either method or a combination of the two approaches.

In the first case, where you do not want the project to be delayed, specify the availability of supplementary resources in the Resource data set and set DELAY=0. In the latter case, where extra resources are unavailable and you are willing to delay project completion time, set the DELAY= option to some very large number or leave it unspecified (in which case it is assumed to be + INFINITY). You can achieve a combination of both effects (using supplementary levels and setting a limit on the delay allowed) by specifying an intermediate value for the DELAY= option and including an observation in the Resource data set with supplementary levels.

You can also use the INFEASDIAGNOSTIC option which is equivalent to specifying infinite supplementary levels for all the resources under consideration. In this case, the DELAY= value is assumed to equal the default value of +INFINITY, unless it is specified otherwise. See [Example 2.17](#), “INFEASDIAGNOSTIC Option and Aggregate Resource Type,” for an illustration.

Note that the DELAY= option presupposes that all the activities can be subjected to the same amount of delay. In some situations, you may want to control the amount of delay for each activity on the basis of some criterion, say the amount of float present in the activity. The ACTDELAY= option enables you to specify a variable amount of delay for each activity.

Resource-Driven Durations and Resource Allocation

If resource-driven durations or resource calendars are specified, the procedure computes the start and finish times for each resource separately for each activity. An activity is considered to be completed only when all the resources have completed their work on that activity. Thus, an activity’s start (finish) time is computed as the minimum (maximum) of the start (finish) times for all the resources used by that activity.

During resource-constrained scheduling, an activity enters the list of activities waiting for resources when all its precedence constraints have been satisfied. As before, this list is ordered using the scheduling rule specified. At this point, a tentative start and finish time is computed for each of the resources required by the activity using

the resource's duration and calendar. An attempt is made to schedule *all* of this activity's resources at these calculated times using the available resources. If the attempt is successful, the activity is scheduled to start at the given time with the appropriate resource schedule times, and the required resources are reduced from the resource availabilities. Otherwise, the procedure attempts to schedule the next activity in the list of activities waiting for resources. When all activities have been considered at the given time, the procedure continues to the next event and continues the allocation process. Note that, at a given point of time, the procedure schedules the activity only if all the required resources are available for that activity to start at that time (or at the nearest time per that resource's calendar), unless you specify the `INDEPENDENTALLOC` option.

The `INDEPENDENTALLOC` option enables each resource to be scheduled independently for the activity. Thus, when an activity enters the list of activities waiting for resources, each resource requirement is considered independently, and a particular resource can be scheduled for that activity even if none of the other resources are available. However, the spanning type of resources must always be available throughout the activity's duration. Note that the activity is considered to be finished (and its successors can start) only after all the resources for that activity have been scheduled. Note also that this option is valid even if all activities have fixed durations and calendars are not associated with resources.

Activity Splitting

As mentioned in the “Scheduling Method” section on page 114, PROC CPM assumes that activities cannot be preempted once they have started. Thus, an activity is scheduled only if it can be assured of enough resources throughout its entire duration. Sometimes, you may be able to make better use of the resources by allowing activities to be *split*. PROC CPM enables you to specify the maximum number of segments that an activity can be split into as well as the minimum duration of any segment of the activity. Suppose that for a given activity, d is its duration, $maxn$ is the maximum number of segments allowed, and $dmin$ is the minimum duration allowed for a segment. If one or the other of these values is not given, it is calculated appropriately based on the duration of the activity.

The scheduling algorithm described earlier is modified as follows:

- In Step 2, the procedure tries to schedule the entire activity (call it A) if it is critical. Otherwise, PROC CPM schedules, if possible, only the first part (say A1) of the activity (of length $dmin$). The remainder of the activity (call it A2, of length $d - dmin$) is added to the waiting list to be scheduled later. When it is A2's turn to be scheduled, it is again a candidate for splitting if the values of $maxn$ and $dmin$ allow it, and if it is not critical. This process is repeated until the entire activity has been scheduled.
- While ordering the activities in the waiting list, in case of a tie, the split segments of an activity are given priority over unsplit activities. Note that some scheduling rules could lead to more splitting than others.
- Activities that have an alignment type of MS or MF imposed on them by the `ALIGNTYPE` variable are not split.

Note that splitting may not always reduce project completion time; it is designed to make better use of resources. In particular, if there are gaps in resource availability, it allows activities to be split and scheduled around the gaps, thus using the resources more efficiently.

If activity splitting is allowed, a new variable is included in the Schedule data set called `SEGMENT_NO` (*segment number*). If splitting does occur, the Schedule data set has more observations than the Activity data set. Activities that are not split are treated as before, except that the value of the variable `SEGMENT_NO` is set to missing. For split activities, the number of observations output is one more than the number of disjoint segments created.

The first observation corresponding to such an activity has `SEGMENT_NO` set to missing, and the `S_START` and `S_FINISH` times are set to be equal to the start and finish times, respectively, of the entire activity. That is, `S_START` is equal to the scheduled start time of the first segment, and `S_FINISH` is equal to the scheduled finish time of the last segment that the activity is split into. Following this observation, there are as many observations as the number of disjoint segments in the activity. All values for these additional observations are the same as the corresponding values for the first observation for this activity, except for the variables `SEGMENT_NO`, `S_START`, `S_FINISH`, and the `DURATION` variable. `SEGMENT_NO` is the index of the segment, `S_START` and `S_FINISH` are the resource-constrained start and finish times for this segment, and `DURATION` is the duration of this segment.

Actual Dates and Resource Allocation

The resource-constrained scheduling algorithm uses the early start schedule as the base schedule to determine possible start times for activities in the project. If an **ACTUAL** statement is used in the invocation of PROC CPM, the early start schedule (as well as the late start schedule) reflects the progress information that is specified for activities in the project, and thus affects the resource constrained schedule also. Further, activities that are already completed or in progress are scheduled at their actual start without regard to resource constraints. If the resource usage profile for such activities indicates that the resources are insufficient, a warning is printed to the log, but the activities are not postponed beyond their actual start time. The Usage data set contains negative values for the availability of the insufficient resources. These extra amounts are assumed to have come from the supplementary levels of the resources (if such a reservoir existed); for details on supplementary resources, see the “[Secondary Levels of Resources](#)” section on page 117.

If activity splitting is allowed (through the specification of the `MINSEGMENTDUR` or `MAXNSEGMENT` variable or the `SPLITFLAG` or `TIMENOWSPLIT` option), activities that are currently in progress may be split at `TIMENOW` if resources are insufficient; then the second segment of the split activity is added to the list of activities that need to be scheduled subject to resource constraints. Starting from `TIMENOW`, all activities that are still unscheduled are treated as described in the “[Scheduling Method](#)” section on page 114.

Specifying Alternate Resources

PROC CPM enables you to identify alternate resources that can be substituted for any given resource that is insufficient. Thus, for example, you can specify that if programmer John is unavailable for a given task, he can be substituted by programmer David or Robert. This information is passed to PROC CPM through the Resource data set.

As with other aspects of the Resource data set, each observation is identified by a keyword indicating the type of information in that observation. Two keywords, ALTRATE and ALTPRTY, enable you to specify the rate of substitution and a prioritization of the alternate resources when a resource has more than one substitution (lower value indicates higher priority). Further, a new variable (identified to PROC CPM through the RESID= option) is used to identify the resource for which alternates are being specified in the current observation. Consider the following Resource data:

OBS	OBSTYPE	RES_NAME	RES_DATE	JOHN	DAVID	ROBERT
1	RESTYPE		.	1	1.0	1.0
2	ALTRATE	JOHN	.	1	0.5	0.5
3	ALTPRTY	JOHN	.	1	2.0	3.0
4	RESLEVEL		15JUL04	1	1.0	1.0

In these Resource data, the second observation indicates that John can be substituted by David or Robert; however, either David or Robert can accomplish John's tasks with half the effort. In other words, if an activity requires 1 unit of John, it can also be accomplished with 0.5 units of David. Also, the third observation, with OBSTYPE='ALTPRTY', indicates that if John is unavailable, PROC CPM should first try to use David and if he, too, is unavailable, then should use Robert. This set up enables a wide range of control for specifying alternate resources.

In other words, the mechanism for specifying alternate resources is as follows: for each resource, specify a list of possible alternatives along with a conversion rate and an order in which the alternatives are to be considered. In the Resource data set, add another variable (identified by the RESID= option) to specify the name of the resource variable for which alternatives are being specified (the variable RES_NAME in the preceding example).

Let OBSTYPE='ALTRATE' for the observation that specifies the rate of conversion for each possible alternate resource (missing implies the particular resource cannot be substituted). For resources that *drive* an activity's duration, the specification of the alternate rate is used as a multiplier of the resource-driven duration. See the "Resource-Driven Durations and Alternate Resources" section on page 122 for details.

Let OBSTYPE='ALTPRTY' for the observation that specifies a prioritization for the resources.

Note that all substitute resources must be of the same type (replenishable or consumable) as the primary resource. The specification of the RESID= option triggers

the use of alternate resources. If alternate resources are used, the Schedule data set contains new variables that specify the actual resources that are used; the names of these variables are obtained by prefixing the resource names by ‘U’. When activities are allowed to be split and alternate resources are allowed, different segments of the activity can use a different set of resources. If this is the case, the Schedule data set contains a different observation for every segment that uses a different set of resources, even if these segments are contiguous in time. Note that contiguous segments, even if they use different sets of resources, are not treated as true splits for the purpose of counting the number of splits allowed for the activity.

By default, multiple resources cannot be used to substitute for a single resource. To enable multiple alternates, use the `MULTIPLEALTERNATES` option or add an observation to the Resource data set identifying which resources allow multiple alternates. For details, see the “[Specifying Multiple Alternates](#)” section on page 121.

See [Example 2.20](#) for an illustration of the use of alternate resources.

Specifying Multiple Alternates

As described in the “[Specifying Alternate Resources](#)” section on page 120, you can use the Resource data set to specify alternate resources for any given resource. You can specify a rate of substitution and a priority for substitution. However, the CPM procedure will not use multiple alternate resources to substitute for a given resource. For example, suppose that an activity needs two programmers and the available programmers (alternate resources) are John and Mary. By default, the CPM procedure cannot assign both John and Mary to the activity to fulfill the resource requirement of two programmers.

However, this type of substitution is useful to effectively model group resources or skill pools. To enable substitution of multiple alternates for a single resource, use the `MULTIPLEALTERNATES` option in the `RESOURCE` statement. This option enables all resources that have alternate specifications (through observations of the type `ALTRATE` or `ALTPRTY` in the Resource data set) to use multiple alternates.

You can refine this feature to selectively allow multiple substitution or set a minimum rate of substitution, by adding special observations to the Resource data set. As with other aspects of the Resource data set, the specifications related to multiple alternates are identified by observations with special keywords, `MULTALT` and `MINARATE`.

Let `OBSTYPE=‘MULTALT’` for the observation that identifies which resources can have multiple alternates. Valid values for such an observation are ‘0’ and ‘1’: ‘0’ indicates that the resource cannot be substituted by multiple resources, and ‘1’ indicates that it can be substituted by multiple resources. If the Resource data set contains such an observation, the `MULTIPLEALTERNATES` option is ignored and the values specified in the observation are used to allow multiple substitutions for only selected resources.

Let `OBSTYPE=‘MINARATE’` for the observation that indicates the minimum rate of substitution for each resource. For example, you may not want a primary resource requirement of 1.5 programmers, to be satisfied by 5 different alternate programmers at a rate of 0.3 each. To ensure that the minimum rate of substitution is 0.5, specify

the value for the resource variable, PROGRAMMER, as '0.5' in the observation with OBSTYPE='MINARATE'. In other words, use this observation if you do not wish to split an activity's resource requirement across several alternate resources with a very small rate of utilization per resource.

Consider the following Resource data:

OBS	OBSTYPE	RES_NAME	RES_DATE	JOHN	DAVID	ROBERT
1	RESTYPE		.	1	1	1
2	ALTRATE	JOHN	.	1	2	2
3	MULTALT	.	.	1	.	.
4	MINARATE	.	.	0.5	.	.
5	RESLEVEL		15JUL04	0	1.0	1.0

In these Resource data, observations 3 and 4 control the use of multiple alternates. They specify that a requirement for John can be substituted with multiple alternates. Further, if multiple alternates are used instead of John, do not allocate them in units less than 0.5. Note also that observation 2 indicates that David and Robert require twice the effort to accomplish John's tasks. Thus, if an activity requires 1 unit of John, and he is unavailable, the CPM procedure will require 2 units of David (or Robert) to substitute for John. However, only 1 unit each of David and Robert is available. If multiple alternates are *not* allowed, the resource allocation algorithm will fail. However, since the resource John *does* allow multiple substitution, the activity can be scheduled with 1 unit of David and 1 unit of Robert (each substituting for 1/2 of the requirement for John).

Allowing multiple alternates for a single resource raises an interesting question: When distributing the resource requirements across multiple alternatives, should the primary resource be included in the list of multiple alternates? For instance, in the preceding example, if the resource level for John is '0.5' (in observation 5), should the activity use John at rate 0.5 and assign the remainder to one (or more) of the alternate resources? Or, should the primary resource be excluded from the list of possible alternates? You can choose either behavior for the primary resource by specifying '1' (for inclusion) or '0' (for exclusion) in the observation with OBSTYPE='ALTRATE' that corresponds to the primary resource (with RES_NAME='JOHN'). Thus, in the preceding example, John can be one of the multiple alternates when substituting for himself. To exclude John from the list, set the value of the variable JOHN to '0' in observation 2. Note that you will also need to set the value of JOHN to '0' in any observation with OBSTYPE='ALTPRTY' and RES_NAME='JOHN'.

Resource-Driven Durations and Alternate Resources

The "Specifying Alternate Resources" section on page 120 describes the use of the RESID= option and the observations of type 'ALTRATE' and 'ALTPRTY' in the Resource data set to control the use of alternate resources during resource allocation. The behavior described in that section refers to the substitution of resources for resources that have a fixed duration. Alternate resources can also be specified for resources that drive an activity's duration. However, the specification of the alternate rate is interpreted differently: it is used as a multiplier of the resource-driven duration.

For example, consider the following Resource data:

OBS	OBSTYPE	RES_NAME	RES_DATE	JOHN	DAVID	ROBERT
1	RESTYPE	.	.	1	1	1
2	RESRCDUR	.	.	1	1	1
3	ALTRATE	JOHN	.	1	2	2
4	ALTPRTY	JOHN	.	1	2	3
5	RESLEVEL	.	15JUL04	.	1.0	1.0

In these Resource data, the second observation indicates that all the resources are driving resources. The third observation indicates that John can be substituted by David or Robert; however, either David or Robert will require twice as long to accomplish John's tasks for resource-driven activities. Thus, in contrast to the fixed-duration activities, the ALTRATE specification changes the *duration* of the alternate resource, not the *rate of use*.

For instance, consider the following activity with the specified values for the DURATION and WORK variables and the resource requirement for John:

OBS	ACTIVITY	DURATION	WORK	JOHN	DAVID	ROBERT
1	Act1	3	10	1	.	.

Activity 'Act1' requires 10 days of work from John, indicating that the resource-driven duration for Act1 is 10 days. However, from the preceding Resource data, John is not available, but can be substituted by David or Robert, who will require twice as long to accomplish the work. So, if Act1 is scheduled using either one of the alternate resources, its resource-driven duration will be 20 days.

Auxiliary Resources

Sometimes, the use of a certain resource may require simultaneous use of other resources. For example, use of a crane will necessitate the use of a crane operator. In other words, if an activity needs the resource, CRANE, it will also need a corresponding resource, CRANEOP. Such requirements can be easily modeled by adding both CRANE and CRANEOP to the list of resources required by the activity.

However, when alternate resources are used, the problem becomes more complex. For example, suppose an activity requires a CRANE and there are two possible cranes that can be used, CRANE1 and CRANE2. You can specify CRANE1 and CRANE2 as the alternate resources for CRANE. Suppose further that each of the two cranes has a specific operator, CRANEOP1 and CRANEOP2, respectively. Specifying CRANEOP1 and CRANEOP2 separately as alternates for CRANEOP will not necessarily guarantee that CRANEOP1 (or CRANEOP2) is used as the alternate for CRANEOP in conjunction with the use of the corresponding CRANE1 (or CRANE2).

You can model such a situation by the use of Auxiliary resource specification: specify CRANEOP1 and CRANEOP2 as auxiliary resources for CRANE1 and CRANE2,

respectively. Auxiliary resources are specified through the Resource data set, using observations identified by the keyword `AUXRES` for the value of the `OBSTYPE` variable. For an observation of this type, the `RESID` variable specifies the name of the primary resource. (This is similar to the specification of `ALTRATE` and `ALTPRTY`.)

Once auxiliary resources are specified in the Resource data set, it is sufficient to specify only the primary resource requirements in the Activity data set. In this situation, for example, it is sufficient to require a `CRANE` for the activity in the Activity data set.

In the Resource data set, add a new observation type, ‘`AUXRES`’, which will specify the auxiliary resources that are needed for each primary resource. For an observation of this type, the `RESID` variable specifies the name of the primary resource. The value for each auxiliary resource indicates the rate at which it is required whenever the primary resource is used. You will also need to specify `CRANE1` and `CRANE2` as the alternate resources for `CRANE` in the Resource data set.

When scheduling the activity, PROC CPM will schedule `CRANE1` (or `CRANE2`) as the alternate only if both `CRANE1` and `CRANEOP1` (or `CRANE2` and `CRANEOP2`) are available.

For instance, the preceding example will have the following Resource data set:

<code>OBSTYPE</code>	<code>RESID</code>	<code>PER</code>	<code>CRANE</code>	<code>CRANE1</code>	<code>CRANE2</code>	<code>CRANEOP1</code>	<code>CRANEOP2</code>
<code>AUXRES</code>	<code>CRANE1</code>	.	.	.	.	1	.
<code>AUXRES</code>	<code>CRANE2</code>	.	.	.	.	.	1
<code>ALTRATE</code>	<code>CRANE</code>	.	.	1	1	.	.
<code>RESLEVEL</code>	.	10JUL04	.	1	1	1	1

RESOURCEOUT= Usage Data Set

The `RESOURCEOUT=` data set (referred to as the Usage data set) contains information about the resource usage for the resources specified in the `RESOURCE` statement. The options `ALL`, `AVPROFILE`, `ESPROFILE`, `LSPROFILE`, and `RCPROFILE` (each is discussed earlier in the “`RESOURCE Statement`” section on page 75) control the number of variables that are to be created in this data set. The `ROUTINTERVAL=` and `ROUTINTPER=` options control the number of observations that this data set is to contain. Of the options controlling the number of variables, `AVPROFILE` and `RCPROFILE` are allowed only if the procedure is used to obtain a resource-constrained schedule.

The Usage data set always contains a variable named `_TIME_` that specifies the date for which the resource usage or availability in the observation is valid. For each of the variables specified in the `RESOURCE` statement, one, two, three, or four new variables are created depending on how many of the four possible options (`AVPROFILE`, `ESPROFILE`, `LSPROFILE`, and `RCPROFILE`) are in effect. If none of these four options is specified, the `ALL` option is assumed to be in effect. Recall that the `ALL` option is equivalent to specifying `ESPROFILE` and `LSPROFILE` when PROC CPM is used to obtain an unconstrained schedule, and it is equivalent to specifying all four options when PROC CPM is used to obtain a resource-constrained schedule.

The new variables are named according to the following convention:

- The prefix A is used for the variable describing the resource availability profile.
- The prefix E is used for the variable denoting the early start usage.
- The prefix L is used for the variable denoting the late start usage.
- The prefix R is used for the variable denoting the resource-constrained usage.

The suffix is the name of the resource variable if the name is less than the maximum possible variable length (which is dependent on the VALIDVARNAME option). If the length of the name is equal to this maximum length, the suffix is formed by deleting the character following the $(n/2)$ th position. The user must ensure that this naming convention results in unique variable names in the Usage data set.

The ROUTINTERVAL=*routeinterval* and ROUTINTPER=*routeintper* options specify that two successive values of the `_TIME_` variable differ by *routeintper* number of *routeinterval* units, measured with respect to a specific calendar. If the *routeinterval* is not specified, PROC CPM chooses a default value depending on the format of the start and finish variables in the Schedule data set. The value of *routeinterval* is indicated in a message written to the SAS log.

The MINDATE=*mindate* and MAXDATE=*maxdate* options specify the minimum and maximum values of the `_TIME_` variable, respectively. Thus, the Usage data set has observations containing the resource usage information from *mindate* to *maxdate* with the time interval between the values of the `_TIME_` variable in two successive observations being equal to *routeintper* units of *routeinterval*, measured with respect to a specific calendar. For example, if *routeinterval* is MONTH and *routeintper* is 3, then the time interval between successive observations in the Usage data set is three months.

The calendar used for incrementing the `_TIME_` variable is specified using the AROUTCAL= or NROUTCAL= options depending on whether the calendars for the project are specified using alphanumeric or numeric values, respectively. In the absence of either of these specifications, the default calendar is used. For example, if the default calendar follows a five-day work week and ROUTINTERVAL=DAY, the Usage data set will not contain observations corresponding to Saturdays and Sundays. You can also use the ROUTNOBREAK option to indicate that there should be no breaks in the `_TIME_` values due to breaks or holidays.

Interpretation of Variables

The availability profile indicates the amount of resources available at the beginning of the time interval specified in the `_TIME_` variable, after accounting for the resources used through the previous time period.

By default, each observation in the Resource Usage data set indicates the *rate* of resource usage per unit *routeinterval* at the start of the time interval specified in the `_TIME_` variable. Note that *replenishable resources* are assumed to be tied to an activity during any of the activity's breaks or holidays that fall in the course of the activity's duration. For *consumable resources*, you can use the CUMUSAGE option

to obtain *cumulative usage* of the resource, instead of *daily rate of usage*. Often, it is more useful to obtain *cumulative usage* for consumable resources.

You can use the TOTUSAGE option on the RESOURCE statement to get the *total* resource usage for each resource within each time period. If you wish to obtain both the *rate* of usage and the *total* usage for each time period, use the APPEND option on the RESOURCE statement.

The following example illustrates the default interpretation of the new variables.

Suppose that for the data given earlier (see the “[Specifying Resource Requirements](#)” section on page 113), activities ‘A’ and ‘B’ have S_START equal to 1JUL04 and 5JUL04, respectively. If the RESOURCE statement has the options AVPROFILE and RCPROFILE, the Usage data set has these five variables, TIME, RWORKERS, AWORKERS, RBRICKS, and ABRICKS. Suppose further that *rouinterval* is DAY and *rouintper* is 1. The Usage data set contains the following observations:

<u>TIME</u>	RWORKERS	AWORKERS	RBRICKS	ABRICKS
1JUL04	0	0	100	1000
2JUL04	0	0	100	900
3JUL04	0	0	100	800
4JUL04	0	0	100	700
5JUL04	2	2	100	600
6JUL04	2	2	0	500
7JUL04	2	2	0	500
8JUL04	2	2	0	500
9JUL04	0	4	0	1000

On each day of activity A’s duration, the resource BRICKS is consumed at the rate of 100 bricks per day. At the beginning of the first day (July 1, 2004), all 1000 bricks are still available. Note that each day the availability drops by 100 bricks, which is the rate of consumption. On July 5, activity ‘B’ is scheduled to start. On the four days starting with July 5, the value of RWORKERS is ‘2’, indicating that 2 workers are used on each of those days leaving an available supply of 2 workers (AWORKERS is equal to ‘2’ on all 4 days).

If ROUTINTPER is set to 2, and the CUMUSAGE option is used, then the observations would be as follows:

<u>TIME</u>	RWORKERS	AWORKERS	RBRICKS	ABRICKS
1JUL04	0	0	0	1000
3JUL04	0	0	200	800
5JUL04	2	2	400	600
7JUL04	2	2	500	500
9JUL04	0	4	500	1000

Note that the value of RBRICKS indicates the *cumulative* usage of the resource BRICKS through the *beginning* of the date specified by the value of the variable

`_TIME_` in each observation. That is why, for example, `RBRICKS` = 0 on 1JUL04 and not 200.

If the procedure uses supplementary levels of resources, then, on a day when supplementary levels of resources were used through the beginning of the day, the value for the availability profile for the relevant resources would be negative. The absolute magnitude of this value would denote the amount of supplementary resource that was used through the beginning of the day. For instance, if `ABRICKS` is ‘-100’ on 11JUL04, it would indicate that 100 bricks from the supplementary reservoir were used through the end of July 10, 2004. See [Example 2.16](#), “Using Supplementary Resources,” and [Example 2.17](#), “INFEASDIAGNOSTIC Option and Aggregate Resource Type.”

If, for the same data, `ROUTINTPER` is 2, and the `APPEND` option is specified, the Usage data set would contain two sets of observations, the first indicating the *rate of resource usage per day*, and the second set indicating the *product of the rate and the time interval between two successive observations*. The observations (five in each set) would be as follows:

<code>_TIME_</code>	<code>OBS_TYPE</code>	<code>RWORKERS</code>	<code>RBRICKS</code>
01JUL04	<code>RES_RATE</code>	0	100
03JUL04	<code>RES_RATE</code>	0	100
05JUL04	<code>RES_RATE</code>	2	100
07JUL04	<code>RES_RATE</code>	2	0
09JUL04	<code>RES_RATE</code>	0	0
01JUL04	<code>RES_USED</code>	0	200
03JUL04	<code>RES_USED</code>	0	200
05JUL04	<code>RES_USED</code>	4	100
07JUL04	<code>RES_USED</code>	4	0
09JUL04	<code>RES_USED</code>	0	0

Variable Usage Profile for Consumable Resources

For consumable resources that have a variable usage profile (as indicated by the values 1 or 2 for observations of type `RESUSAGE` in the Resource data set), the values of the usage variables indicate the amount of the resource consumed by an activity at the beginning or end of the activity. For example, consider the resources `PAYMENT` and `ADVANCE` specified in the following Resource data set:

<code>OBS</code>	<code>OBSTYPE</code>	<code>DATE</code>	<code>WORKERS</code>	<code>BRICKS</code>	<code>PAYMENT</code>	<code>ADVANCE</code>
1	<code>RESTYPE</code>	.	1	2	2	2
2	<code>RESUSAGE</code>	.	.	.	2	1
3	<code>RESLEVEL</code>	1JUL2004	4	1000	2000	500

Suppose the activity ‘Task 1’, specified in the following observation, is scheduled to start on July 1, 2004:

OBS	ACTIVITY	DUR	WORKERS	BRICKS	PAYMENT	ADVANCE
1	Task 1	5	1	100	1000	200

For these data, the resource usage profile for the resources will be as indicated in the following output:

<u>TIME</u>	RWORKERS	RBRICKS	RPAYMENT	RADVANCE
1JUL04	1	100	0	200
2JUL04	1	100	0	0
3JUL04	1	100	0	0
4JUL04	1	100	0	0
5JUL04	1	100	0	0
6JUL04	0	0	1000	0

RESOURCESCHED= Resource Schedule Data Set

The Resource Schedule data set (requested by the RESSCHED= option on the CPM statement) is very similar to the Schedule data set, and it contains the start and finish times for each resource used by each activity. The data set contains the variables listed in the ACTIVITY, TAILNODE, and HEADNODE statements and all the relevant schedule variables (E_START, E_FINISH, and so forth). For each activity in the project, this data set contains the schedule for the entire activity as well as the schedule for each resource used by the activity. The variable RESOURCE identifies the name of the resource to which the observation refers; the value of the RESOURCE variable is missing for observations that refer to the entire activity's schedule. The variable DUR_TYPE indicates whether the resource is a driving resource or a spanning resource or whether it is of the fixed type.

A variable _DUR_ indicates the duration of the activity for the resource identified in that observation. This variable has missing values for resources that are of the spanning type. For resources that are of the driving type, the variable _WORK_ shows the total amount of work required by the resource for the activity in that observation. The variable R_RATE shows the rate of usage of the resource for the relevant activity. Note that for driving resources, the variable _DUR_ is computed as (WORK / R_RATE).

If you specify an ACTUAL statement, the Resource Schedule data set also contains the STATUS variable indicating whether the resource has completed work on the activity, is in progress, or is still pending.

Multiproject Scheduling

The CPM procedure enables you to define activities in a multiproject environment with multiple levels of nesting. You can specify a PROJECT variable that identifies the name or number of the project to which each activity belongs. The PROJECT variable must be of the same type and length as the ACTIVITY variable. Further, each project can be considered as an activity, enabling you to specify precedence constraints, alignment dates, or progress information for the different projects. Precedence constraints can be specified between two projects, between activities in the same or different projects, or between a project and activities in another project.

The PROJECT variable enables you to specify the name of the project to which each activity belongs. Each project can in turn be treated as an activity that belongs to a bigger project. Thus, the (PROJECT, ACTIVITY) pair of variables enables you to specify multiple levels of nesting using a hierarchical structure for the (task, super-task) relationship.

In the following discussion, the terms superproject, supertask, parent task, ancestor task, project, or subproject refer to a *composite* task (a task composed of other tasks). A lowest level task (one which has no subtasks under it) is referred to as a child task, descendent task, a *leaf* task, or a *regular* task.

You can assign most of the “activity attributes” to a supertask; however, some of the interpretations may be different. The significant differences are listed as follows.

Activity Duration

Even though a supertask has a value specified for the DURATION variable, the finish time of the supertask may not necessarily be equal to the (start time + duration). The start and finish times of a parent task (supertask) always encompass the span of all its subtasks. In other words, the start (finish) time of a supertask is the minimum start (maximum finish) time of all its subtasks.

The specified DURATION for a supertask is used only if the USEPROJDUR option is specified; this variable is used to compute an upper bound on the late finish time of the project. In other words, you can consider the duration of a supertask as a *desired* duration that puts a constraint on its finish time.

Note: You cannot specify resource-driven durations for supertasks.

Precedence Constraints

You cannot specify a Start-to-Finish or Finish-to-Finish type of precedence constraint when the Successor task is a supertask. Such a constraint is ignored, and a warning is written to the log.

Time Constraints

The CPM procedure supports all the customary time constraints for a supertask. However, since the supertask does not really have an inherent duration, some of the constraints may lead to unexpected results.

For example, a constraint of the type SLE (Start Less than or Equal to) on a leaf task uses the task’s duration to impose a maximum late finish time for the task. However, for a supertask, the duration is determined by the span of all its subtasks, which

may depend on the activities' calendars. The CPM procedure uses an estimate of the supertask's duration computed on the basis of the precedence constraints to determine the maximum finish time for the supertask using the date specified for the SLE constraint. Such a constraint may not translate to the correct upper bound on the supertask's finish time if the project has multiple calendars. Note that the presence of multiple calendars could change the computed duration of the supertask depending on the starting date of the supertask. Thus, in general, it is better to specify SGE (Start Greater than or Equal to) or FLE (Finish Less than or Equal to) constraints on supertasks.

Note that alignment constraints of the type SGE or FLE percolate down the project hierarchy. For example, if there is an SGE specification on a supertask, then all the subtasks of this supertask must also start on or after the specified date.

Mandatory constraints (either of the type MS or MF) are used to set fixed start and finish times on the relevant task. Such constraints are checked for consistency between a parent task and all its descendants.

Progress Information

You can enter progress information for supertasks in the same way as you do for leaf tasks. The procedure attempts to reconcile inconsistencies between the actual start and finish times of a parent and its children. However, it is sufficient (and less ambiguous) to enter progress information only about the tasks at the lowest level.

Resource Requirements

You can specify resource requirements for supertasks in the same way as you do for regular tasks. However, the supertask is scheduled in conjunction with all its subtasks. In other words, a leaf task is scheduled only when *its resources and the resources for all its ancestors* are available in sufficient quantity. Thus, a supertask needs to have enough resources throughout the schedule of any of its subtasks; in fact, the supertask needs to have enough resources throughout its entire span. In other words, a supertask's resource requirements are treated as "spanning."

In addition to the above treatment of a supertask's resources, there are two other resource scheduling options available for handling the resource requirements of supertasks. You can use the AGGREGATEPARENTRES option in the PROJECT statement to indicate that a supertask's resource requirements are to be used only for aggregation. In other words, resource allocation is performed taking into account the resource requirements of only the leaf tasks. Alternately, you can choose to ignore any resource requirements specified for supertasks by specifying the IGNOREPARENTRES option. Note the difference between the AGGREGATEPARENTRES and IGNOREPARENTRES options. The first option includes the supertask's requirements while computing the aggregate resource usage, while the second option is equivalent to setting all parent resource requirements to 0.

Resource-Driven Durations

Any WORK specification is ignored for a parent task. Note that resources required for a supertask cannot drive the duration of the task; a supertask's duration is driven by all its subtasks. Note that each leaf task can still be resource driven.

Schedule Computation

The project hierarchy and all the precedence constraints (between leaf tasks, between supertasks, or between a supertask and a leaf task) are taken into consideration when the project schedule is computed. A task (parent or leaf) can be scheduled only when *its precedences and all its parent's precedences* are satisfied.

During the forward pass of the scheduling algorithm, all independent start tasks (leaf tasks or supertasks with no predecessors) are initialized to the project start date. Once a supertask's precedences (if any) are satisfied, all its subtasks whose precedences have been satisfied are added to the list of activities that can be scheduled. The early start times for the subtasks are initialized to the early start time of the supertask and are then updated, taking into account the precedence constraints and any alignment constraints on the activities.

Once all the subtasks are scheduled, a supertask's early start and finish times are set to the minimum early start and maximum early finish, respectively, of all its subtasks.

The late start schedule is computed using a backward pass through the project network, considering the activities in a reverse order from the forward pass. The late schedule is computed starting with the last activity (activities) in the project; the late finish time for each such activity is set to the master project's finish date. By default, the master project's finish date is the maximum of the early finish dates of all the activities in the master project (if a FINISHBEFORE date is specified with the FBDATE option, this date is used as the starting point for the backward calculations).

During the backward pass, the late finish time of a supertask is determined by the precedence constraints and any alignment specification on the supertask. You can specify a finish constraint on a supertask by using the ALIGNDATE and ALIGNTYPE variables, or by using the SEPCRIT or USEPROJDUR option.

If a finish constraint is specified using the ALIGNDATE and ALIGNTYPE specifications, the L_FINISH for the supertask is initialized to this value. If the SEPCRIT option is specified, the supertask's late finish time is initialized to its early finish time. If the USEPROJDUR option is specified, the late finish time for the supertask is initialized using the early start time of the supertask and the specified supertask duration. Note that the late finish time of the supertask could further be affected by the precedence constraints. Once a supertask's late finish has been determined, this value is treated as an upper bound on the late finish of all its subtasks.

As with the early start schedule, once all the subtasks have been scheduled, the late start and finish times for a supertask are set to the minimum late start and maximum late finish time, respectively, of all its subtasks.

Schedule Data Set

If a PROJECT variable is specified, the Schedule data set contains the PROJECT variable as well as two new variables called PROJ_DUR and PROJ_LEV.

The PROJ_DUR variable contains the project duration (computed as E_FINISH - E_START of the project) for each superproject in the master project. This variable has missing values for the leaf tasks. Note that it is possible

for $(L_FINISH - L_START)$ to be different from the value of `PROJ_DUR`. If a resource-constrained schedule is produced by PROC CPM, the project duration is computed using the resource constrained start and finish times of the superproject; in other words, in this case $PROJ_DUR = (S_FINISH - S_START)$.

The `PROJ_LEV` variable specifies the depth of each activity from the root of the project hierarchy tree. The root of the tree has `PROJ_LEV = 0`; note that if the project does not have a single root, a common root is defined by the CPM procedure.

The `ADDACT` option on the PROC CPM statement causes an observation to be added to the Schedule data set for this common root. This observation contains the project start and finish times and the project duration. The `ADDACT` option also adds an observation for any activity that may appear as a value of the `SUCCESSOR` or `PROJECT` variable without appearing as a value of the `ACTIVITY` variable.

In addition to the `PROJ_DUR` and `PROJ_LEV` variables, you can request that a WBS code be added to the output data set (using the option `ADDWBS`). You can also add variables, `ES_ASC`, `ES_DESC`, `LS_ASC`, `LS_DESC`, `SS_ASC`, and `SS_DESC`, that indicate a sorting order for activities in the output data set. For example, the variable `ES_ASC` enables you to sort the output data set in such a way that the activities within each superproject are ordered according to increasing early start time.

Macro Variable `_ORCPM_`

The CPM procedure defines a macro variable named `_ORCPM_`. This variable contains a character string that indicates the status of the procedure. It is set at procedure termination. The form of the `_ORCPM_` character string is `STATUS= REASON=`, where `STATUS=` is either `SUCCESSFUL` or `ERROR_EXIT` and `REASON=` (if PROC CPM terminated unsuccessfully) can be one of the following:

- `CYCLE`
- `RES_INFEASIBLE`
- `BADDATA_ERROR`
- `MEMORY_ERROR`
- `IO_ERROR`
- `SEMANTIC_ERROR`
- `SYNTAX_ERROR`
- `CPM_BUG`
- `UNKNOWN_ERROR`

This information can be used when PROC CPM is one step in a larger program that needs to determine whether the procedure terminated successfully or not. Because `_ORCPM_` is a standard SAS macro variable, it can be used in the ways that all macro variables can be used.

Input Data Sets and Related Variables

The CPM procedure uses activity, resource, and holiday data from several different data sets with key variable names being used to identify the appropriate information. Table 2.24 lists all of the variables associated with each input data set and their interpretation by the CPM procedure. The variables are grouped according to the statement that they are identified in. Some variables use default names and are not required to be identified in any statement.

Table 2.24. PROC CPM Input Data Sets and Associated Variables

Data Set	Statement	Variable Name	Interpretation
CALEDATA	CALID	CALID	Calendar corresponding to work pattern
	Default names	D_LENGTH	Length of standard work day
		SUN	Work pattern on day of week, valid values: WORKDAY, HOLIDAY, or one of the numeric variables in the Workday data set
		... _SAT_	
DATA	ACTIVITY	ACTIVITY	Activity in AON format
	ACTUAL	A_START	Actual start time of activity
		A_FINISH	Actual finish time of activity
		REMDUR	Remaining duration
		PCTCOMP	Percentage of work completed
	ALIGNDATE	ALIGNDATE	Time constraint on activity
	ALIGNTYPE	ALIGNTYPE	Type of time constraint, valid values: SGE, SEQ, SLE, FGE, FEQ, FLE, MS, MF
BASELINE	B_START	Baseline start time of activity	
	B_FINISH	Baseline finish time of activity	
CALID	CALID	Calendar followed by activity	
DURATION	DURATION	Duration of activity	
	FINISH	Finish time of activity	
	START	Start time of activity	

Table 2.24. (continued)

Data Set	Statement	Variable Name	Interpretation
	HEADNODE	HEADNODE	Head of arrow (arc) in AOA format
	ID	ID	Additional project information
	PROJECT	PROJECT	Project to which activity belongs
	RESOURCE	ACTDELAY ACTPRTY MAXNSEGMT MINSEGMDUR RESOURCE	Activity delay Activity priority Maximum number of segments Minimum duration of a segment Amount of resource required
	SUCCESSOR	WORK SUCCESSOR LAG	Amount of work required Successor in AON format Nonstandard precedence relationship
	TAILNODE	TAILNODE	Tail of arrow (arc) in AOA format
HOLIDATA	CALID	CALID	Calendar to which holiday applies
	HOLIDAY	HOLIDAY HOLIDUR HOLIFIN	Start of holiday Duration of holiday End of holiday
RESOURCEIN	RESOURCE	OBSTYPE PERIOD RESID RESOURCE	Type of observation; valid values: RESLEVEL, RESTYPE, SUPLEVEL, RESPRTY, ALTRATE, ALTPRTY, RESUSAGE, AUXRES, MULTALT, MINARATE, CALENDAR Time from which resource is available Resource for which alternates are given Resource type, priority, availability, alternate rate, alternate priority
WORKDATA		Any numeric	On-off pattern of work

Table 2.24. (continued)

Data Set	Statement	Variable Name	Interpretation
		variable	(shift definition)

Missing Values in Input Data Sets

The following table summarizes the treatment of missing values for variables in the input data sets used by PROC CPM.

Table 2.25. Treatment of Missing Values in the CPM Procedure

Data Set	Variable	Value Used / Assumption Made / Action Taken
CALEDATA	CALID D_LENGTH _SUN_ ... _SAT_	default calendar (0 or DEFAULT) DAYLENGTH, if available. 8:00, if INTERVAL = WORKDAY, DTWRKDAY 24:00, otherwise corresponding shift for default calendar
DATA	ACTIVITY ACTDELAY ACTPRTY ALIGNDATE ALIGNTYPE A_FINISH A_START B_FINISH B_START CALID DURATION FINISH HEADNODE ID LAG MAXNSEGMT MINSEGMDUR PCTCOMP PROJECT REMDUR RESOURCE START SUCCESSOR TAILNODE WORK	input error: procedure stops with error message DELAY= specification infinity (indicates lowest priority) project start date for start activity SGE: if ALIGNDATE is not missing see “ Progress Updating ” for details see “ Progress Updating ” for details updated if UPDATE= option is on updated if UPDATE= option is on default calendar (0 or DEFAULT) input error: procedure stops with error message value ignored input error: procedure stops with error message missing FS_0: if corresponding successor variable value is not missing calculated from MINSEGMDUR 0.2 * DURATION see “ Progress Updating ” for details activity is at highest level see “ Progress Updating ” for details 0 value ignored value ignored input error: procedure stops with error message resources use fixed duration
HOLIDATA	CALID HOLIDAY	holiday applies to all calendars defined observation ignored

Table 2.25. (continued)

Data Set	Variable	Value Used / Assumption Made / Action Taken
	HOLIDUR HOLIFIN	ignored if HOLIFIN is not missing; 1, otherwise ignored if HOLIDUR is not missing; HOLIDAY + (1 unit of INTERVAL), otherwise
RESOURCEIN	OBSTYPE PERIOD RESID RESOURCE	RESLEVEL input error if OBSTYPE is RESLEVEL, otherwise ignored observation ignored 1.0, if OBSTYPE is RESTYPE infinity, if OBSTYPE is RESPTY 0.0, if OBSTYPE is RESUSAGE 0.0, if OBSTYPE is SUPLEVEL 0.0, if OBSTYPE is RESLEVEL and this is the first observation of this type otherwise, equal to value in previous observation
WORKDATA	any numeric variable	00:00, if first observation 24:00, otherwise

FORMAT Specification

As can be seen from the description of all of the statements and options used by PROC CPM, the procedure handles SAS date, time, and datetime values in several ways: as time constraints on the activities, holidays specified as date or datetime values, periods of resource availabilities, actual start and finish times, and several other options that control the scheduling of the activities in time. The procedure tries to reconcile any differences that may exist in the format specifications for the different variables. For example, if holidays are formatted as SAS date values while alignment constraints are specified in terms of SAS datetime values, PROC CPM converts all of the holidays to SAS datetime values suitably. However, the procedure needs to know how the variables are to be interpreted (as SAS date, datetime, or time values) in order for this reconciliation to be correct. Thus, it is important that you always use a FORMAT statement explicitly for each SAS date, time, or datetime variable that is used in the invocation of PROC CPM.

Computer Resource Requirements

There is no inherent limit on the size of the project that can be scheduled with the CPM procedure. The number of activities and precedences, as well as the number of resources are constrained only by the amount of memory available. Naturally, there needs to be a sufficient amount of core memory available in order to invoke and initialize the SAS system. As far as possible, the procedure attempts to store all the data in core memory.

However, if the problem is too large to fit in core memory, the procedure resorts to the use of utility data sets and swaps between core memory and utility data sets as necessary, unless the `NOUTIL` option is specified. The procedure uses the `NACTS=`, `NADJ=`, `NNODES=`, and `NRESREQ=` options to determine approximate problem size. If these options are not specified, the procedure estimates default values on the basis of the number of observations in the Activity data set. See the “Syntax” section on page 55 for default specifications.

The storage requirement for the data area required by the procedure is proportional to the number of activities and precedence constraints in the project and depends on the number of resources required by each activity. The time required depends heavily on the number of resources that are constrained and on how tightly constrained they are.

Examples

This section contains examples that illustrate several features of the CPM procedure. Most of the available options are used in at least one example. Two tables, [Table 2.28](#) and [Table 2.29](#), at the end of this section list all the examples in this chapter and the options and statements in the CPM procedure that are illustrated by each example.

A simple project concerning the manufacture of a widget is used in most of the examples in this section. [Example 2.22](#) deals with a nonstandard application of PROC CPM and illustrates the richness of the modeling environment that is available with the SAS System. The last few examples use different projects to illustrate multi-project scheduling and resource-driven durations, resource calendars and negative resource requirements.

There are 14 activities in the widget manufacturing project. [Example 2.1](#) and [Example 2.2](#) illustrate a basic project network that is built upon by succeeding examples. The tasks in the project can be classified by the division or department that is responsible for them.

[Table 2.26](#) lists the detailed names (and corresponding abbreviations) of all the activities in the project and the department that is responsible for each one. As in any typical project, some of these activities must be completed before others. For example, the activity ‘Approve Plan’ must be done before any of the activities ‘Drawings’, ‘Anal. Market’, and ‘Write Specs’, can start. [Table 2.27](#) summarizes the relationships among the tasks and gives the duration in days to complete each task. This table shows the relationship among tasks by listing the immediate successors to each task.

Table 2.26. Widget Manufacture: Activity List

Task	Department	Activity Description
Approve Plan	Planning	Finalize and Approve Plan
Drawings	Engineering	Prepare Drawings
Anal. Market	Marketing	Analyze Potential Markets
Write Specs	Engineering	Write Specifications
Prototype	Engineering	Build Prototype
Mkt. Strat.	Marketing	Develop Marketing Concept
Materials	Manufacturing	Procure Raw Materials
Facility	Manufacturing	Prepare Manufacturing Facility
Init. Prod.	Manufacturing	Initial Production Run
Evaluate	Testing	Evaluate Product In-House
Test Market	Testing	Mail Product to Sample Market
Changes	Engineering	Engineering Changes
Production	Manufacturing	Begin Full Scale Production
Marketing	Marketing	Begin Full Scale Marketing

Table 2.27. Widget Manufacture: Precedence Information

Task	Dur	Successor	Successor	Successor
Approve Plan	10	Drawings	Anal. Market	Write Specs
Drawings	20	Prototype		
Anal. Market	10	Mkt. Strat.		
Write Specs	15	Prototype		
Prototype	30	Materials	Facility	
Mkt. Strat.	25	Test Market	Marketing	
Materials	60	Init. Prod.		
Facility	45	Init. Prod.		
Init. Prod.	30	Test Market	Marketing	Evaluate
Evaluate	40	Changes		
Test Market	30	Changes		
Changes	15	Production		
Production	0			
Marketing	0			

The relationship among the tasks can be represented by the network in [Figure 2.6](#). The diagram was produced by the NETDRAW procedure. The code used is the same as in [Example 7.11](#) in [Chapter 7](#), “[The NETDRAW Procedure](#),” although the colors may be different.

Example 2.1. Activity-on-Node Representation

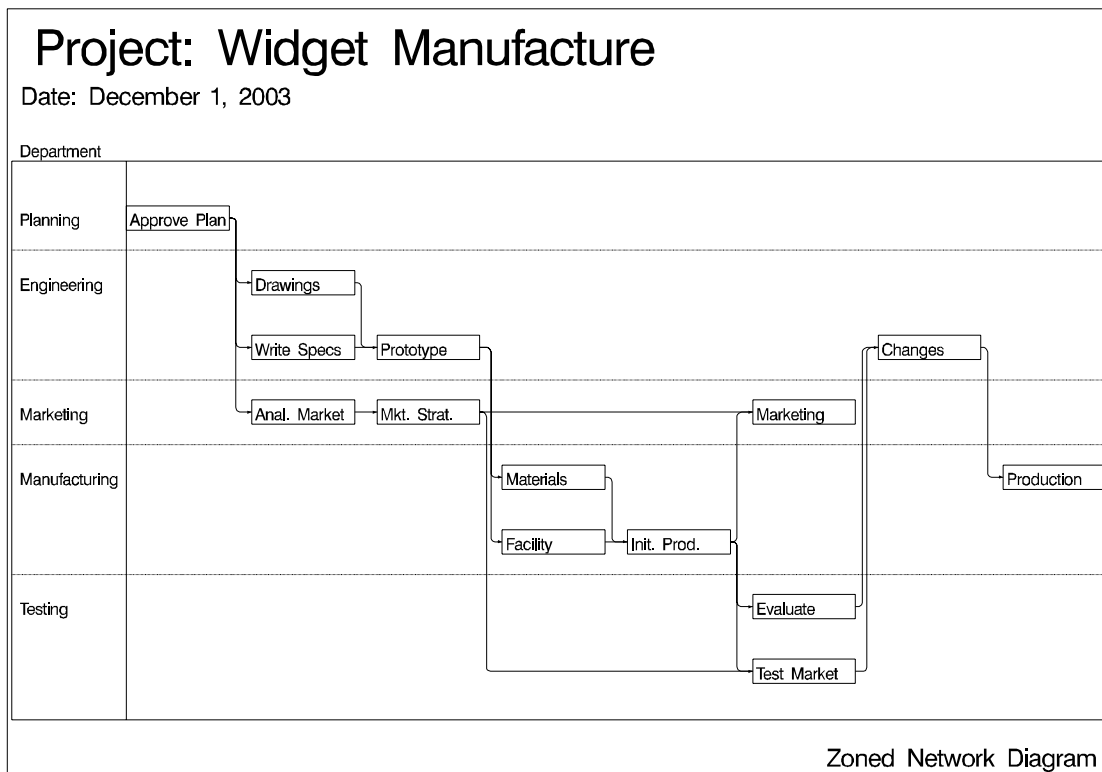


Figure 2.6. Network Showing Task Relationships in Activity-on-Node Format

The following DATA step reads the project network in AON format into a SAS data set named WIDGET. The data set contains the minimum amount of information needed to invoke PROC CPM, namely, the ACTIVITY variable, one or more SUCCESSOR variables, and a DURATION variable. PROC CPM is invoked, and the Schedule data set is displayed using the PRINT procedure in [Output 2.1.1](#). The Schedule data set produced by PROC CPM contains the solution in canonical units, without reference to any calendar date or time. For instance, the early start time of the first activity in the project is the beginning of period 0 and the early finish time is the beginning of period 5.

```

/* Activity-on-Node representation of the project */
data widget;
  format task $12. succ1-succ3 $12.;
  input task & days succ1 & succ2 & succ3 & ;
  datalines;
Approve Plan    5 Drawings      Anal. Market  Write Specs
Drawings       10 Prototype      .             .
Anal. Market   5 Mkt. Strat.   .             .
Write Specs     5 Prototype     .             .
Prototype      15 Materials    Facility      .
Mkt. Strat.    10 Test Market  Marketing     .
  
```

```

Materials      10  Init. Prod.  .      .
Facility       10  Init. Prod.  .      .
Init. Prod.    10  Test Market  Marketing  Evaluate
Evaluate       10  Changes      .      .
Test Market    15  Changes      .      .
Changes        5   Production  .      .
Production     0   .            .      .
Marketing      0   .            .      .
;

/* Invoke PROC CPM to schedule the project specifying the */
/* ACTIVITY, DURATION and SUCCESSOR variables             */
proc cpm;
  activity task;
  duration days;
  successor succ1 succ2 succ3;
run;

title 'Widget Manufacture: Activity-On-Node Format';
title2 'Critical Path';
proc print;
  run;

```

Output 2.1.1. Critical Path

Widget Manufacture: Activity-On-Node Format										
Critical Path										
					E	L				
					E	L	T	F		
					-	F	-	F	-	-
					S	I	S	I	F	F
					d	T	N	T	N	L
					a	A	I	A	I	O
					y	R	S	R	S	A
					s	T	H	T	H	T
1	Approve Plan	Drawings	Anal. Market	Write Specs	5	0	5	0	5	0
2	Drawings	Prototype			10	5	15	5	15	0
3	Anal. Market	Mkt. Strat.			5	5	10	35	40	30
4	Write Specs	Prototype			5	5	10	10	15	5
5	Prototype	Materials	Facility		15	15	30	15	30	0
6	Mkt. Strat.	Test Market	Marketing		10	10	20	40	50	30
7	Materials	Init. Prod.			10	30	40	30	40	0
8	Facility	Init. Prod.			10	30	40	30	40	0
9	Init. Prod.	Test Market	Marketing	Evaluate	10	40	50	40	50	0
10	Evaluate	Changes			10	50	60	55	65	5
11	Test Market	Changes			15	50	65	50	65	0
12	Changes	Production			5	65	70	65	70	0
13	Production				0	70	70	70	70	0
14	Marketing				0	50	50	70	70	20

Alternately, if you know that the project is to start on December 1, 2003, then you can determine the project schedule with reference to calendar dates by specifying the DATE= option in the PROC CPM statement. The default unit of duration is assumed to be DAY. The architecture of PROC CPM enables you to include any number of additional variables that are relevant to the project. Here, for example, you may want to include more descriptive activity names and department information. The data set DETAILS contains more information about the project that is merged with the WIDGET data set to produce the WIDGETN data set. The ID statement is useful to

carry information through to the output data set. [Output 2.1.2](#) displays the resulting output data set.

```

data details;
  format task $12. dept $13. descrpt $30. ;
  input task & dept $ descrpt & ;
  label dept = "Department"
         descrpt = "Activity Description";
  datalines;
Approve Plan  Planning           Finalize and Approve Plan
Drawings      Engineering        Prepare Drawings
Anal. Market  Marketing           Analyze Potential Markets
Write Specs    Engineering        Write Specifications
Prototype     Engineering        Build Prototype
Mkt. Strat.   Marketing           Develop Marketing Concept
Materials     Manufacturing       Procure Raw Materials
Facility      Manufacturing       Prepare Manufacturing Facility
Init. Prod.   Manufacturing       Initial Production Run
Evaluate      Testing              Evaluate Product In-House
Test Market   Testing              Mail Product to Sample Market
Changes       Engineering        Engineering Changes
Production    Manufacturing       Begin Full Scale Production
Marketing     Marketing           Begin Full Scale Marketing
;

/* Combine project network data with additional details */
data widgetn;
  merge widget details;
  run;

/* Schedule using PROC CPM, identifying the variables */
/* that specify additional project information          */
/* and set project start date to be December 1, 2003 */
proc cpm data=widgetn date='1dec03'd;
  activity task;
  successor succ1 succ2 succ3;
  duration days;
  id dept descrpt;
  run;

proc sort;
  by e_start;
  run;

options ls=90;

title2 'Project Schedule';
proc print;
  id descrpt;
  var dept e_ l_ t_float f_float;
  run;

```

Output 2.1.2. Critical Path: Activity-On-Node Format

Widget Manufacture: Activity-On-Node Format Project Schedule								
d		E	E	L	L	T	F	
e		-	F	-	F	-	-	
s		S	I	S	I	F	F	
c	d	T	N	T	N	L	L	
r	e	A	I	A	I	O	O	
p	p	R	S	R	S	A	A	
t	t	T	H	T	H	T	T	
Finalize and Approve Plan	Planning	01DEC03	05DEC03	01DEC03	05DEC03	0	0	
Prepare Drawings	Engineering	06DEC03	15DEC03	06DEC03	15DEC03	0	0	
Analyze Potential Markets	Marketing	06DEC03	10DEC03	05JAN04	09JAN04	30	0	
Write Specifications	Engineering	06DEC03	10DEC03	11DEC03	15DEC03	5	5	
Develop Marketing Concept	Marketing	11DEC03	20DEC03	10JAN04	19JAN04	30	30	
Build Prototype	Engineering	16DEC03	30DEC03	16DEC03	30DEC03	0	0	
Procure Raw Materials	Manufacturing	31DEC03	09JAN04	31DEC03	09JAN04	0	0	
Prepare Manufacturing Facility	Manufacturing	31DEC03	09JAN04	31DEC03	09JAN04	0	0	
Initial Production Run	Manufacturing	10JAN04	19JAN04	10JAN04	19JAN04	0	0	
Evaluate Product In-House	Testing	20JAN04	29JAN04	25JAN04	03FEB04	5	5	
Test Product in Sample Market	Testing	20JAN04	03FEB04	20JAN04	03FEB04	0	0	
Begin Full Scale Marketing	Marketing	20JAN04	20JAN04	09FEB04	09FEB04	20	20	
Engineering Changes	Engineering	04FEB04	08FEB04	04FEB04	08FEB04	0	0	
Begin Full Scale Production	Manufacturing	09FEB04	09FEB04	09FEB04	09FEB04	0	0	

Example 2.2. Activity-on-Arc Representation

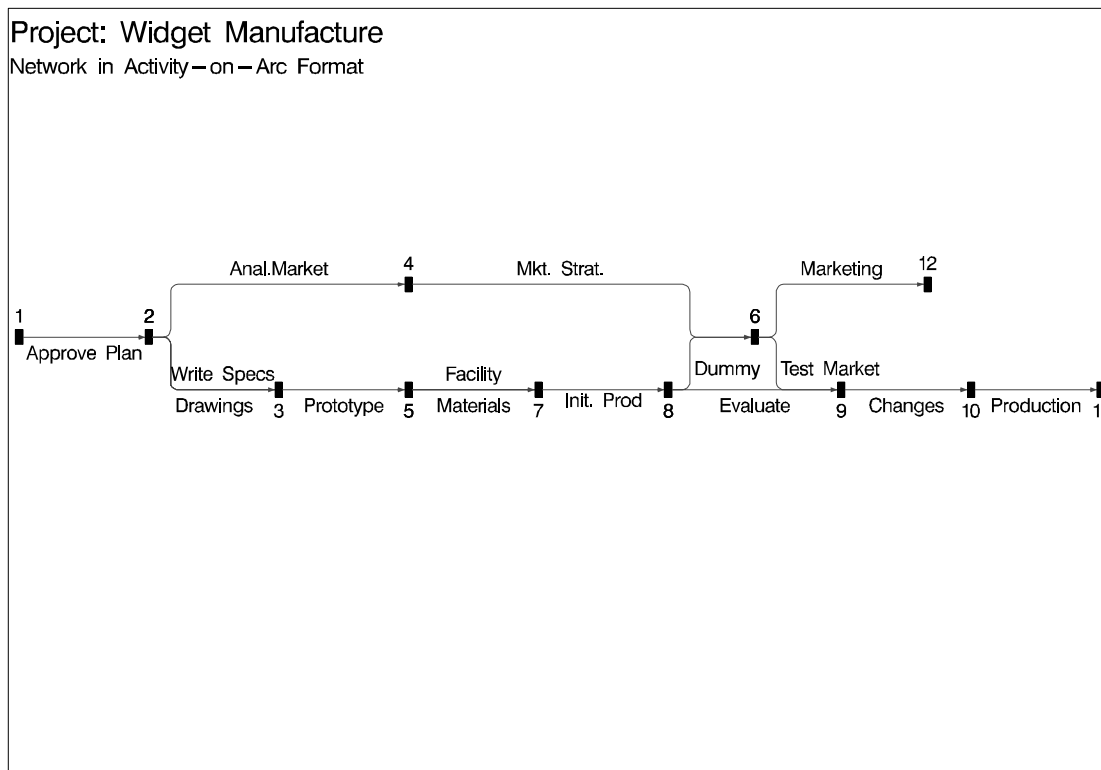


Figure 2.7. Network Showing Task Relationships in Activity-on-Arc Format

The problem discussed in [Example 2.1](#) can also be described in an AOA format.

The network is illustrated in [Figure 2.7](#). Note that the network has an arc labeled ‘Dummy’, which is required to accurately capture all the precedence relationships. Dummy arcs are often needed when representing scheduling problems in AOA format.

The following DATA step saves the network description in a SAS data set, WIDGAOA. The data set contains the minimum amount of information required by PROC CPM for an activity network in AOA format, namely, the TAILNODE and HEADNODE variables, which indicate the direction of each arc in the network and the DURATION variable which gives the length of each task. In addition, the data set also contains a variable identifying the name of the task associated with each arc. This variable, `task`, can be identified to PROC CPM using the ACTIVITY statement. Note that PROC CPM treats each observation in the data set as a new task, thus enabling you to specify multiple arcs between a pair of nodes. In this example, for instance, both the tasks ‘Drawings’ and ‘Write Specs’ connect the nodes 2 and 3; likewise, both the tasks ‘Materials’ and ‘Facility’ connect the nodes 5 and 7. If multiple arcs are not allowed, you would need more dummy arcs in this example. However, the dummy arc between nodes 8 and 6 is essential to the structure of the network and cannot be eliminated.

As in [Example 2.1](#), the data set DETAILS containing additional activity information, can be merged with the Activity data set and used as input to PROC CPM to determine the project schedule. For purposes of display (in Gantt charts, and so on) the dummy activity has been given a label, ‘Production Milestone’. [Output 2.2.1](#) displays the project schedule.

```

/* Activity-on-Arc representation of the project */
data widgaoa;
  format task $12. ;
  input task & days tail head;
  datalines;
Approve Plan    5   1   2
Drawings       10   2   3
Anal. Market   5   2   4
Write Specs     5   2   3
Prototype     15   3   5
Mkt. Strat.   10   4   6
Materials     10   5   7
Facility      10   5   7
Init. Prod.   10   7   8
Evaluate      10   8   9
Test Market   15   6   9
Changes        5   9  10
Production     0  10  11
Marketing      0   6  12
Dummy         0   8   6
;

data details;
  format task $12. dept $13. descrpt $30.;
  input task & dept $ descrpt & ;

```

```

        label dept = "Department"
              descrpt = "Activity Description";
        datalines;
Approve Plan   Planning           Finalize and Approve Plan
Drawings      Engineering        Prepare Drawings
Anal. Market  Marketing          Analyze Potential Markets
Write Specs    Engineering        Write Specifications
Prototype     Engineering        Build Prototype
Mkt. Strat.   Marketing          Develop Marketing Concept
Materials     Manufacturing         Procure Raw Materials
Facility      Manufacturing         Prepare Manufacturing Facility
Init. Prod.   Manufacturing         Initial Production Run
Evaluate      Testing              Evaluate Product In-House
Test Market   Testing              Mail Product to Sample Market
Changes       Engineering         Engineering Changes
Production    Manufacturing         Begin Full Scale Production
Marketing     Marketing              Begin Full Scale Marketing
Dummy        .                Production Milestone
;

data widgeta;
  merge widgaoa details;
run;

/* The project is scheduled using PROC CPM */
/* The network information is conveyed using the TAILNODE */
/* and HEADNODE statements. The ID statement is used to */
/* transfer project information to the output data set */
proc cpm data=widgeta date='1dec03'd out=save;
  tailnode tail;
  headnode head;
  duration days;
  activity task;
  id dept descrpt;
run;

proc sort;
  by e_start;
run;

options ls=90;

title 'Widget Manufacture: Activity-On-Arc Format';
title2 'Project Schedule';
proc print;
  id descrpt;
  var dept e_ l_ t_float f_float;
run;

```

Output 2.2.1. Critical Path: Activity-on-Arc Format

Widget Manufacture: Activity-On-Arc Format Project Schedule							
d		E	E	L	L	T	F
e		-	-	-	-	-	-
s		S	I	S	I	F	F
c	d	T	N	T	N	L	L
r	e	A	I	A	I	O	O
p	p	R	S	R	S	A	A
t	t	T	H	T	H	T	T
Finalize and Approve Plan	Planning	01DEC03	05DEC03	01DEC03	05DEC03	0	0
Prepare Drawings	Engineering	06DEC03	15DEC03	06DEC03	15DEC03	0	0
Analyze Potential Markets	Marketing	06DEC03	10DEC03	05JAN04	09JAN04	30	0
Write Specifications	Engineering	06DEC03	10DEC03	11DEC03	15DEC03	5	5
Develop Marketing Concept	Marketing	11DEC03	20DEC03	10JAN04	19JAN04	30	30
Build Prototype	Engineering	16DEC03	30DEC03	16DEC03	30DEC03	0	0
Procure Raw Materials	Manufacturing	31DEC03	09JAN04	31DEC03	09JAN04	0	0
Prepare Manufacturing Facility	Manufacturing	31DEC03	09JAN04	31DEC03	09JAN04	0	0
Initial Production Run	Manufacturing	10JAN04	19JAN04	10JAN04	19JAN04	0	0
Evaluate Product In-House	Testing	20JAN04	29JAN04	25JAN04	03FEB04	5	5
Mail Product to Sample Market	Testing	20JAN04	03FEB04	20JAN04	03FEB04	0	0
Begin Full Scale Marketing	Marketing	20JAN04	20JAN04	09FEB04	09FEB04	20	20
Production Milestone		20JAN04	20JAN04	20JAN04	20JAN04	0	0
Engineering Changes	Engineering	04FEB04	08FEB04	04FEB04	08FEB04	0	0
Begin Full Scale Production	Manufacturing	09FEB04	09FEB04	09FEB04	09FEB04	0	0

Example 2.3. Meeting Project Deadlines

This example illustrates the use of the project finish date (using the `FBDATE=` option) to specify a deadline on the project. In the following program it is assumed that the project data are saved in the data set `WIDGAOA`. `PROC CPM` is first invoked with the `FBDATE=` option. [Output 2.3.1](#) shows the resulting schedule. Note that the entire schedule is shifted in time (as compared to the schedule in [Output 2.2.1](#)) so that the end of the project is on March 1, 2004. The second part of the program specifies a project start date in addition to the project finish date using both the `DATE=` and `FBDATE=` options. The schedule displayed in [Output 2.3.2](#) shows that all of the activities have a larger float than before due to the imposition of a less stringent target date.

```
proc cpm data=widgaoa
    fbdate='1mar04'd interval=day;
    tailnode tail;
    headnode head;
    duration days;
    id task;
    run;

proc sort;
    by e_start;
    run;

options ps=60 ls=78;

title 'Meeting Project Deadlines';
title2 'Specification of Project Finish Date';
```

```

proc print;
  id task;
  var e_: l_: t_float f_float;
run;

proc cpm data=widgaoa
  fbdate='1mar04'd
  date='1dec03'd interval=day;
  tailnode tail;
  headnode head;
  duration days;
  id task;
run;

proc sort;
  by e_start;
run;

title2 'Specifying Project Start and Completion Dates';
proc print;
  id task;
  var e_: l_: t_float f_float;
run;

```

Output 2.3.1. Meeting Project Deadlines: FBDATE= Option

Meeting Project Deadlines Specification of Project Finish Date						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	22DEC03	26DEC03	22DEC03	26DEC03	0	0
Drawings	27DEC03	05JAN04	27DEC03	05JAN04	0	0
Anal. Market	27DEC03	31DEC03	26JAN04	30JAN04	30	0
Write Specs	27DEC03	31DEC03	01JAN04	05JAN04	5	5
Mkt. Strat.	01JAN04	10JAN04	31JAN04	09FEB04	30	30
Prototype	06JAN04	20JAN04	06JAN04	20JAN04	0	0
Materials	21JAN04	30JAN04	21JAN04	30JAN04	0	0
Facility	21JAN04	30JAN04	21JAN04	30JAN04	0	0
Init. Prod.	31JAN04	09FEB04	31JAN04	09FEB04	0	0
Evaluate	10FEB04	19FEB04	15FEB04	24FEB04	5	5
Test Market	10FEB04	24FEB04	10FEB04	24FEB04	0	0
Marketing	10FEB04	10FEB04	01MAR04	01MAR04	20	20
Dummy	10FEB04	10FEB04	10FEB04	10FEB04	0	0
Changes	25FEB04	29FEB04	25FEB04	29FEB04	0	0
Production	01MAR04	01MAR04	01MAR04	01MAR04	0	0

Output 2.3.2. Meeting Project Deadlines: DATE= and FBDATE= Options

Meeting Project Deadlines Specifying Project Start and Completion Dates						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	01DEC03	05DEC03	22DEC03	26DEC03	21	0
Drawings	06DEC03	15DEC03	27DEC03	05JAN04	21	0
Anal. Market	06DEC03	10DEC03	26JAN04	30JAN04	51	0
Write Specs	06DEC03	10DEC03	01JAN04	05JAN04	26	5
Mkt. Strat.	11DEC03	20DEC03	31JAN04	09FEB04	51	30
Prototype	16DEC03	30DEC03	06JAN04	20JAN04	21	0
Materials	31DEC03	09JAN04	21JAN04	30JAN04	21	0
Facility	31DEC03	09JAN04	21JAN04	30JAN04	21	0
Init. Prod.	10JAN04	19JAN04	31JAN04	09FEB04	21	0
Evaluate	20JAN04	29JAN04	15FEB04	24FEB04	26	5
Test Market	20JAN04	03FEB04	10FEB04	24FEB04	21	0
Marketing	20JAN04	20JAN04	01MAR04	01MAR04	41	41
Dummy	20JAN04	20JAN04	10FEB04	10FEB04	21	0
Changes	04FEB04	08FEB04	25FEB04	29FEB04	21	0
Production	09FEB04	09FEB04	01MAR04	01MAR04	21	21

Example 2.4. Displaying the Schedule on a Calendar

This example shows how you can use the output from CPM to display calendars containing the critical path schedule and the early start schedule. The example uses the network described in [Example 2.2](#) and assumes that the data set `SAVE` contains the project schedule. The following program invokes `PROC CALENDAR` to produce two calendars; the first calendar in [Output 2.4.1](#) displays only the critical activities in the project, while the second calendar in [Output 2.4.2](#) displays all the activities in the project. In both invocations of `PROC CALENDAR`, a `WHERE` statement is used to display only the activities that are scheduled to finish in December.

```
proc cpm data=widgaoa out=save
    date='1dec03'd interval=day;
    tailnode tail;
    headnode head;
    duration days;
    id task;
run;

proc sort data=save out=crit;
    where t_float=0;
    by e_start;
run;

title 'Printing the Schedule on a Calendar';
title2 'Critical Activities in December';

/* print the critical act. calendar */
proc calendar schedule
    data=crit;
    id e_start;
    where e_finish <= '31dec03'd;
```

```

var task;
dur days;
run;

/* sort data for early start calendar */
proc sort data=save;
  by e_start;

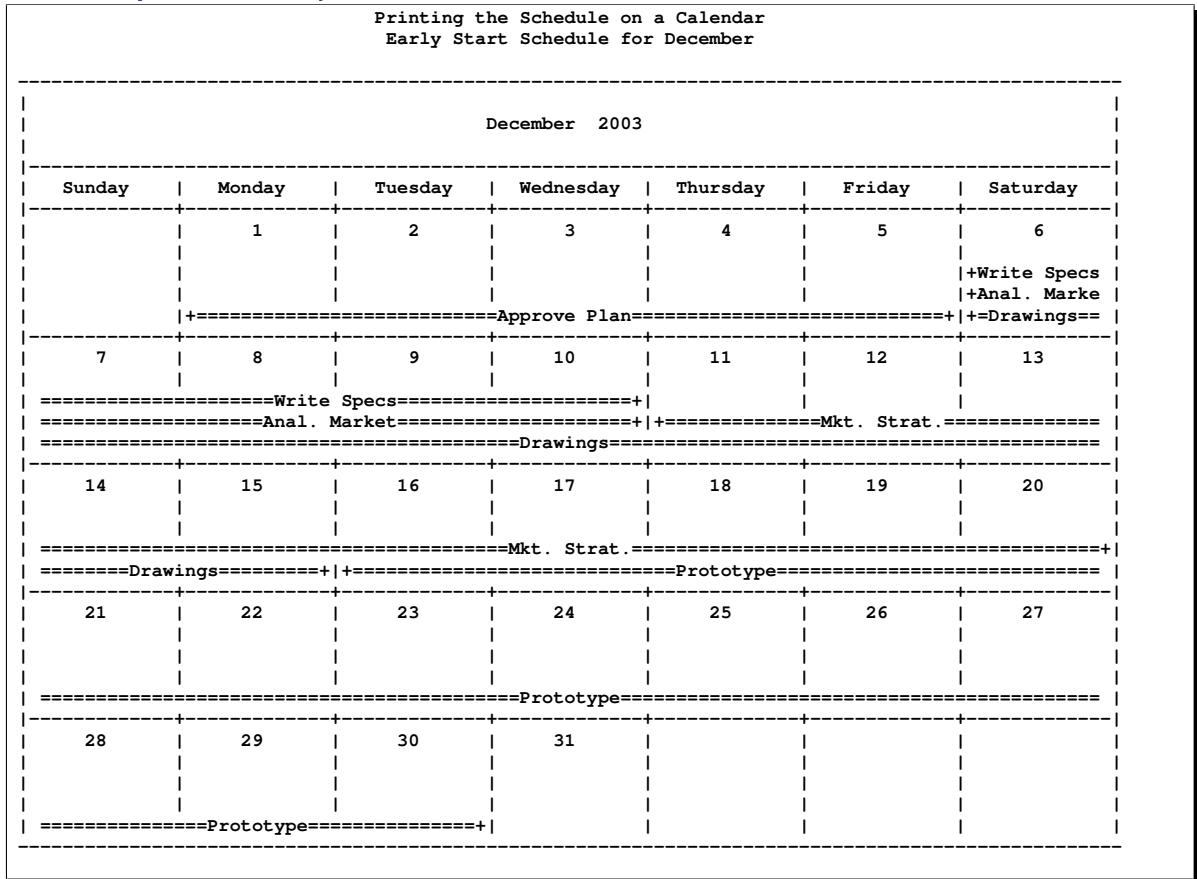
/* print the early start calendar */
title2 'Early Start Schedule for December';
proc calendar schedule data=save;
  id e_start;
  where e_finish <= '31dec03'd;
  var task;
  dur days;
run;

```

Output 2.4.1. Project Calendar: Critical Activities

December 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
	+-----Approve Plan-----+					+Drawings==
7	8	9	10	11	12	13
	-----Drawings-----					
14	15	16	17	18	19	20
	=====Drawings=====+		+-----Prototype-----			
21	22	23	24	25	26	27
	-----Prototype-----					
28	29	30	31			
	=====Prototype=====+					

Output 2.4.2. Project Calendar: All Activities



Example 2.5. Precedence Gantt Chart

This example produces a Gantt chart of the schedule obtained from PROC CPM. The example uses the network described in Example 2.2 (AOA format) and assumes that the data set SAVE contains the schedule produced by PROC CPM and sorted by the variable E_START. The Gantt chart produced shows the early and late start schedules as well as the precedence relationships between the activities. The precedence information is conveyed to PROC GANTT through the TAILNODE= and HEADNODE= options.

```
* specify the device on which you want the chart printed;

goptions vpos=50 hpos=80 border;

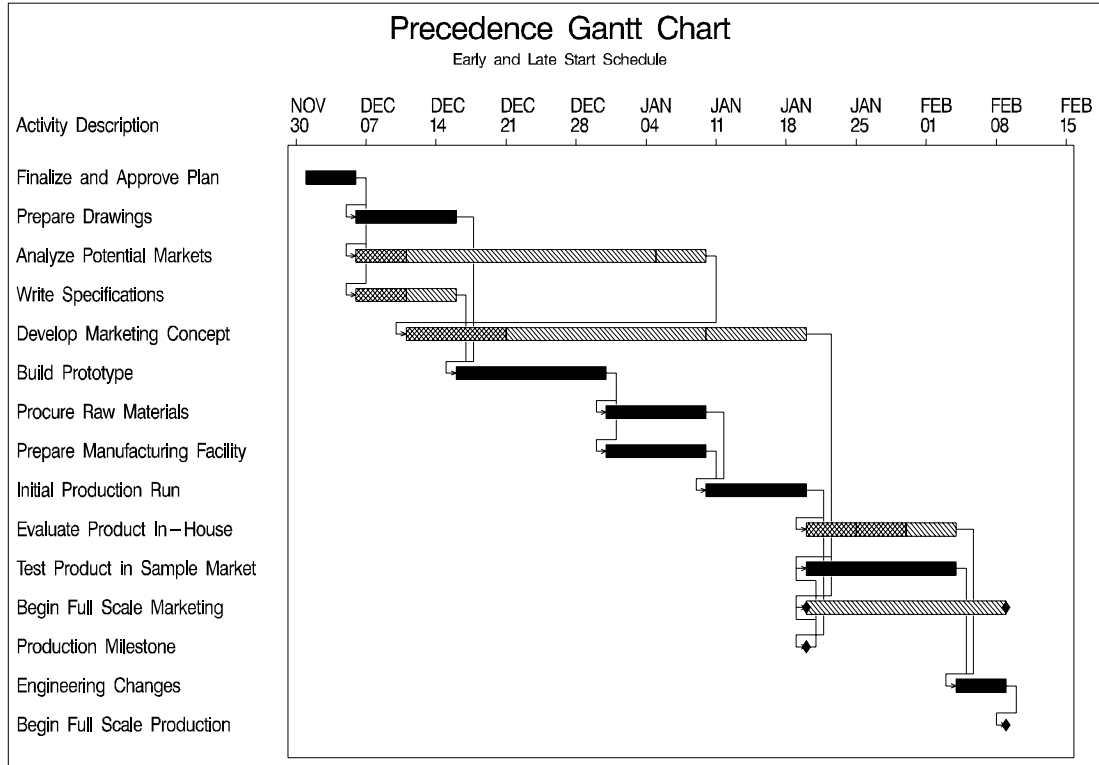
title f=swiss 'Precedence Gantt Chart';
title2 f=swiss 'Early and Late Start Schedule';

proc gantt graphics data=save;
  chart / compress tailnode=tail headnode=head
         font=swiss height=1.5 nojobnum skip=2
         cprec=cyan cmile=magenta
```

```

caxis=black cframe=ligr
dur=days increment=7 nolegend;
id descrpt;
run;

```

Output 2.5.1. Gantt Chart of Project

Example 2.6. Changing Duration Units

This example illustrates the use of the `INTERVAL=` option to identify the units of duration to PROC CPM. In the previous examples, it was assumed that work can be done on the activities all seven days of the week without any break. Suppose now that you want to schedule the activities only on weekdays. To do so, specify `INTERVAL=WEEKDAY` in the PROC CPM statement. [Output 2.6.1](#) displays the schedule produced by PROC CPM. Note that, with a shorter work week, the project finishes on March 8, 2004, instead of on February 9, 2004.

```

proc cpm data=widget out=save
    date='1dec03'd interval=weekday;
    activity task;
    succ    succ1 succ2 succ3;
    duration days;
run;

title 'Changing Duration Units';
title2 'INTERVAL=WEEKDAY';
proc print;

```

```

id task;
var e_: l_: t_float f_float;
run;

```

Output 2.6.1. Changing Duration Units: INTERVAL=WEEKDAY

Changing Duration Units INTERVAL=WEEKDAY						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	01DEC03	05DEC03	01DEC03	05DEC03	0	0
Drawings	08DEC03	19DEC03	08DEC03	19DEC03	0	0
Anal. Market	08DEC03	12DEC03	19JAN04	23JAN04	30	0
Write Specs	08DEC03	12DEC03	15DEC03	19DEC03	5	5
Prototype	22DEC03	09JAN04	22DEC03	09JAN04	0	0
Mkt. Strat.	15DEC03	26DEC03	26JAN04	06FEB04	30	30
Materials	12JAN04	23JAN04	12JAN04	23JAN04	0	0
Facility	12JAN04	23JAN04	12JAN04	23JAN04	0	0
Init. Prod.	26JAN04	06FEB04	26JAN04	06FEB04	0	0
Evaluate	09FEB04	20FEB04	16FEB04	27FEB04	5	5
Test Market	09FEB04	27FEB04	09FEB04	27FEB04	0	0
Changes	01MAR04	05MAR04	01MAR04	05MAR04	0	0
Production	08MAR04	08MAR04	08MAR04	08MAR04	0	0
Marketing	09FEB04	09FEB04	08MAR04	08MAR04	20	20

To display the weekday schedule on a calendar, use the WEEKDAY option in the PROC CALENDAR statement. The following code sorts the Schedule data set by the E_START variable and produces a calendar shown in [Output 2.6.2](#), which displays the schedule of activities for the month of December.

```

proc sort;
  by e_start;
run;

/* truncate schedule: print only for december */
data december;
  set save;
  e_finish = min('31dec03'd, e_finish);
  if e_start <= '31dec03'd;
run;

title3 'Calendar of Schedule';
proc calendar data=december schedule weekdays;
  id e_start;
  finish e_finish;
  var task;
run;

```

Output 2.6.2. Changing Duration Units: WEEKDAY Calendar for December

Changing Duration Units INTERVAL=WEEKDAY Calendar of Schedule				
December 2003				
Monday	Tuesday	Wednesday	Thursday	Friday
1	2	3	4	5
+-----Approve Plan-----+				
8	9	10	11	12
+-----Write Specs-----+				
+-----Anal. Market-----+				
+-----Drawings-----+				
15	16	17	18	19
+-----Mkt. Strat.-----+				
+-----Drawings-----+				
22	23	24	25	26
+-----Prototype-----+				
+-----Mkt. Strat.-----+				
29	30	31		
+-----Prototype-----+				

Note that the durations of the activities in the project are multiples of 5. Thus, if work is done only on weekdays, all activities in the project last 0, 1, 2, or 3 weeks. The INTERVAL= option can also be used to set the units of duration to hours, minutes, seconds, years, months, quarters, or weeks. In this example, the data set WIDGWK is created from WIDGET to set the durations in weeks. PROC CPM is then invoked with INTERVAL=WEEK, and the resulting schedule is displayed in [Output 2.6.3](#). Note that the float values are also expressed in units of weeks.

```
data widgwk;
  set widget;
  weeks = days / 5;
run;
```

```

proc cpm data=widgwk date='1dec03'd interval=week;
  activity task;
  successor succ1 succ2 succ3;
  duration weeks;
  id task;
run;

title2 'INTERVAL=WEEK';
proc print;
  id task;
  var e_ l_ t_float f_float;
run;

```

Output 2.6.3. Changing Duration Units: INTERVAL=WEEK

Changing Duration Units INTERVAL=WEEK						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	01DEC03	07DEC03	01DEC03	07DEC03	0	0
Drawings	08DEC03	21DEC03	08DEC03	21DEC03	0	0
Anal. Market	08DEC03	14DEC03	19JAN04	25JAN04	6	0
Write Specs	08DEC03	14DEC03	15DEC03	21DEC03	1	1
Prototype	22DEC03	11JAN04	22DEC03	11JAN04	0	0
Mkt. Strat.	15DEC03	28DEC03	26JAN04	08FEB04	6	6
Materials	12JAN04	25JAN04	12JAN04	25JAN04	0	0
Facility	12JAN04	25JAN04	12JAN04	25JAN04	0	0
Init. Prod.	26JAN04	08FEB04	26JAN04	08FEB04	0	0
Evaluate	09FEB04	22FEB04	16FEB04	29FEB04	1	1
Test Market	09FEB04	29FEB04	09FEB04	29FEB04	0	0
Changes	01MAR04	07MAR04	01MAR04	07MAR04	0	0
Production	08MAR04	08MAR04	08MAR04	08MAR04	0	0
Marketing	09FEB04	09FEB04	08MAR04	08MAR04	4	4

Example 2.7. Controlling the Project Calendar

This example illustrates the use of the `INTERVAL=`, `DAYSTART=`, and `DAYLENGTH=` options to control the project calendar. In [Example 2.1](#) through [Example 2.5](#), none of these three options is specified; hence the durations are assumed to be days (`INTERVAL=DAY`), and work is scheduled on all seven days of the week. In [Example 2.6](#), the specification of `INTERVAL=WEEKDAY` causes the schedule to skip weekends. The present example shows further ways of controlling the project calendar. For example, you may want to control the work pattern during a standard week or the start and length of the workday.

Suppose you want to schedule the project specified in [Example 2.1](#) but you want to schedule only on weekdays from 9 a.m. to 5 p.m. To schedule the project, use the `INTERVAL=WORKDAY` option rather than the default `INTERVAL=DAY`. Then, one unit of duration is interpreted as eight hours of work. To schedule the manufacturing project to start on December 1, with an eight-hour workday and a five-day work week, you can invoke PROC CPM with the following statements. [Output 2.7.1](#) displays the resulting schedule; note that the start and finish times are expressed in SAS datetime values.

```

title 'Controlling the Project Calendar';
title2 'Scheduling on Workdays';
proc cpm data=widget date='1dec03'd interval=workday;
  activity task;
  succ      succ1 succ2 succ3;
  duration days;
run;

title3 'Day Starts at 9 a.m.';
proc print;
  id task;
  var e_  l_  t_float f_float;
run;

```

Output 2.7.1. Controlling the Project Calendar: INTERVAL=WORKDAY

Controlling the Project Calendar			
Scheduling on Workdays			
Day Starts at 9 a.m.			
task	E_START	E_FINISH	L_START
Approve Plan	01DEC03:09:00:00	05DEC03:16:59:59	01DEC03:09:00:00
Drawings	08DEC03:09:00:00	19DEC03:16:59:59	08DEC03:09:00:00
Anal. Market	08DEC03:09:00:00	12DEC03:16:59:59	19JAN04:09:00:00
Write Specs	08DEC03:09:00:00	12DEC03:16:59:59	15DEC03:09:00:00
Prototype	22DEC03:09:00:00	09JAN04:16:59:59	22DEC03:09:00:00
Mkt. Strat.	15DEC03:09:00:00	26DEC03:16:59:59	26JAN04:09:00:00
Materials	12JAN04:09:00:00	23JAN04:16:59:59	12JAN04:09:00:00
Facility	12JAN04:09:00:00	23JAN04:16:59:59	12JAN04:09:00:00
Init. Prod.	26JAN04:09:00:00	06FEB04:16:59:59	26JAN04:09:00:00
Evaluate	09FEB04:09:00:00	20FEB04:16:59:59	16FEB04:09:00:00
Test Market	09FEB04:09:00:00	27FEB04:16:59:59	09FEB04:09:00:00
Changes	01MAR04:09:00:00	05MAR04:16:59:59	01MAR04:09:00:00
Production	08MAR04:09:00:00	08MAR04:09:00:00	08MAR04:09:00:00
Marketing	09FEB04:09:00:00	09FEB04:09:00:00	08MAR04:09:00:00
task	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	05DEC03:16:59:59	0	0
Drawings	19DEC03:16:59:59	0	0
Anal. Market	23JAN04:16:59:59	30	0
Write Specs	19DEC03:16:59:59	5	5
Prototype	09JAN04:16:59:59	0	0
Mkt. Strat.	06FEB04:16:59:59	30	30
Materials	23JAN04:16:59:59	0	0
Facility	23JAN04:16:59:59	0	0
Init. Prod.	06FEB04:16:59:59	0	0
Evaluate	27FEB04:16:59:59	5	5
Test Market	27FEB04:16:59:59	0	0
Changes	05MAR04:16:59:59	0	0
Production	08MAR04:09:00:00	0	0
Marketing	08MAR04:09:00:00	20	20

If you want to change the length of the workday, use the DAYLENGTH= option in the PROC CPM statement. For example, if you want an eight-and-a-half hour workday instead of the default eight-hour workday, you should include DAYLENGTH='08:30'T in the PROC CPM statement. In addition, you might also want to change the start of the workday. The workday starts at 9 a.m., by default. To

change the default, use the DAYSTART= option. The following program schedules the project to start at 7 a.m. on December 1. The project is scheduled on eight-and-a-half hour workdays each starting at 7 a.m. [Output 2.7.2](#) displays the resulting schedule produced by PROC CPM.

```
proc cpm data=widget date='1dec03'd interval=workday
      daylength='08:30't daystart='07:00't;
  activity task;
  succ      succ1 succ2 succ3;
  duration days;
run;

title3 'Day Starts at 7 a.m. and is 8.5 Hours Long';
proc print;
  id task;
  var e_ l_ t_float f_float;
run;
```

Output 2.7.2. Controlling the Project Calendar: DAYSTART and DAYLENGTH

Controlling the Project Calendar			
Scheduling on Workdays			
Day Starts at 7 a.m. and is 8.5 Hours Long			
task	E_START	E_FINISH	L_START
Approve Plan	01DEC03:07:00:00	05DEC03:15:29:59	01DEC03:07:00:00
Drawings	08DEC03:07:00:00	19DEC03:15:29:59	08DEC03:07:00:00
Anal. Market	08DEC03:07:00:00	12DEC03:15:29:59	19JAN04:07:00:00
Write Specs	08DEC03:07:00:00	12DEC03:15:29:59	15DEC03:07:00:00
Prototype	22DEC03:07:00:00	09JAN04:15:29:59	22DEC03:07:00:00
Mkt. Strat.	15DEC03:07:00:00	26DEC03:15:29:59	26JAN04:07:00:00
Materials	12JAN04:07:00:00	23JAN04:15:29:59	12JAN04:07:00:00
Facility	12JAN04:07:00:00	23JAN04:15:29:59	12JAN04:07:00:00
Init. Prod.	26JAN04:07:00:00	06FEB04:15:29:59	26JAN04:07:00:00
Evaluate	09FEB04:07:00:00	20FEB04:15:29:59	16FEB04:07:00:00
Test Market	09FEB04:07:00:00	27FEB04:15:29:59	09FEB04:07:00:00
Changes	01MAR04:07:00:00	05MAR04:15:29:59	01MAR04:07:00:00
Production	08MAR04:07:00:00	08MAR04:07:00:00	08MAR04:07:00:00
Marketing	09FEB04:07:00:00	09FEB04:07:00:00	08MAR04:07:00:00
task	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	05DEC03:15:29:59	0	0
Drawings	19DEC03:15:29:59	0	0
Anal. Market	23JAN04:15:29:59	30	0
Write Specs	19DEC03:15:29:59	5	5
Prototype	09JAN04:15:29:59	0	0
Mkt. Strat.	06FEB04:15:29:59	30	30
Materials	23JAN04:15:29:59	0	0
Facility	23JAN04:15:29:59	0	0
Init. Prod.	06FEB04:15:29:59	0	0
Evaluate	27FEB04:15:29:59	5	5
Test Market	27FEB04:15:29:59	0	0
Changes	05MAR04:15:29:59	0	0
Production	08MAR04:07:00:00	0	0
Marketing	08MAR04:07:00:00	20	20

An alternate way of specifying the start of each working day is to set the INTERVAL= option to DTWRKDAY and specify a SAS datetime value for the project start date. Using INTERVAL=DTWRKDAY tells CPM that the DATE= option is a SAS datetime value and that the time given is the start of the workday. For the present example, you could have used DATE='1dec03:07:00'dt in conjunction with the specification INTERVAL=DTWRKDAY and DAYLENGTH='08:30't.

Example 2.8. Scheduling around Holidays

This example shows how you can schedule around holidays with PROC CPM. First, save a list of holidays in a SAS data set as SAS date variables. The length of the holidays is assumed to be measured in units specified by the INTERVAL= option. By default, all holidays are assumed to be one unit long. You can control the length of each holiday by specifying either the finish time for each holiday or the length of each holiday in the same observation as the holiday specification.

Output 2.8.1. Scheduling around Holidays: HOLIDAYS data set

Scheduling Around Holidays Data Set HOLIDAYS			
Obs	holiday	holifin	holidur
1	24DEC03	26DEC03	4
2	01JAN04	.	.

For example, the data set HOLIDAYS, displayed in [Output 2.8.1](#) specifies two holidays, one for Christmas and the other for New Year's Day. The variable `holiday` specifies the start of each holiday. The variable `holifin` specifies the end of the Christmas holiday as 26Dec03. Alternately, the variable `holidur` can be used to interpret the Christmas holiday as lasting four interval units starting from the 24th of December. If the variable `holidur` is used, the actual days when work is not done depends on the `INTERVAL=` option and on the underlying calendar used. This form of specifying holidays or breaks is useful for indicating vacations for specific employees. The second observation in the data set defines the New Year's holiday as just one day long because both the variables `holifin` and `holidur` variables have missing values.

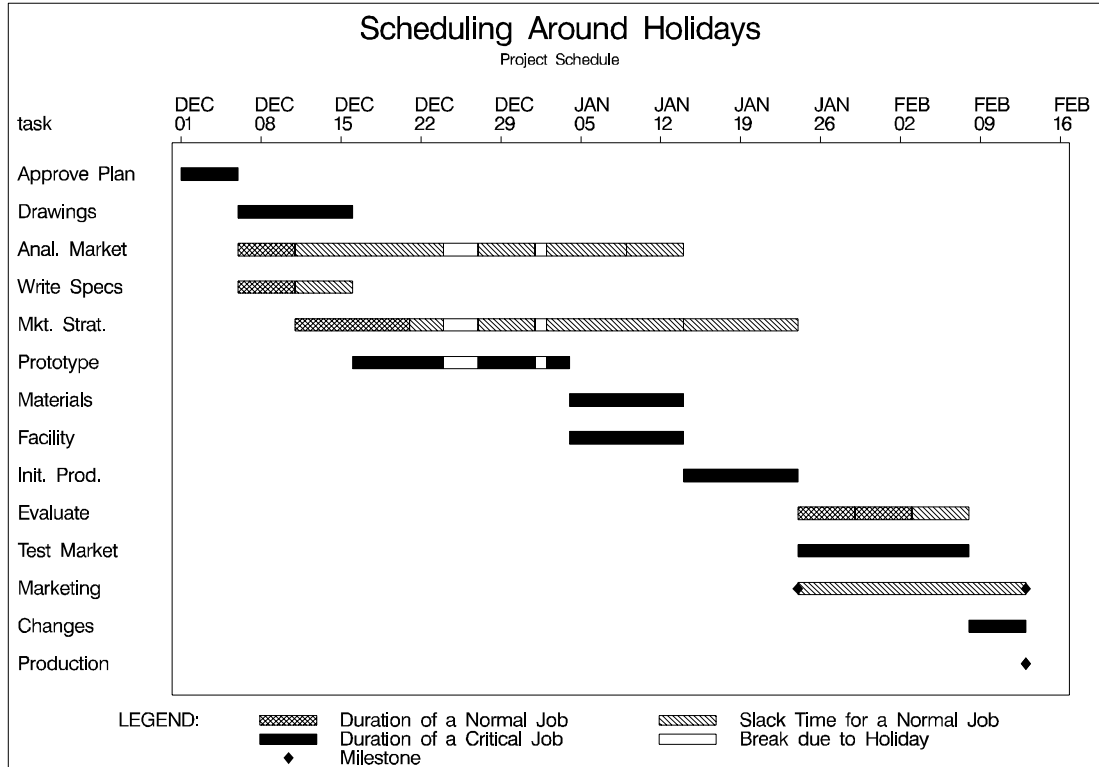
To invoke PROC CPM to schedule around holidays, use the `HOLIDATA=` option in the PROC CPM statement (see the following program) to identify the data set, and list the names of the variables in the data set in a `HOLIDAY` statement. The holiday start and finish are identified by specifying the `HOLIDAY` and `HOLIFIN` variables. [Output 2.8.2](#) displays the schedule obtained.

```
proc cpm data=widget holidata=holidays
    out=saveh date='1dec03'd ;
    activity task;
    succ      succ1 succ2 succ3;
    duration days;
    holiday holiday / holifin=(holifin);
run;

proc sort data=saveh;
    by e_start;
run;

title 'Scheduling Around Holidays';
title2 'Project Schedule';
goptions vpos=50 hpos=80 border;
goptions ftext=swiss;

proc gantt graphics data=saveh holidata=holidays;
    chart / compress
        font=swiss height=1.5 nojobnum skip=2
        dur=days increment=7
        holiday=(holiday) holifin=(holifin)
        cframe=ligr;
    id task;
run;
```

Output 2.8.2. Scheduling around Holidays: Project Schedule

The next two invocations illustrate the use of the `HOLIDUR=` option and the effect of the `INTERVAL=` option on the duration of the holidays. Recall that the holiday duration is also assumed to be in *interval* units where *interval* is the value specified for the `INTERVAL=` option. Suppose that a holiday period for the entire project starts on December 24, 2003, with duration specified as 4. First the project is scheduled with `INTERVAL=DAY` so that the holidays are on December 24, 25, 26, and 27, 2003. [Output 2.8.3](#) displays the resulting schedule. The project completion is delayed by one day due to the extra holiday on December 27, 2003.

```
proc cpm data=widget holidata=holidays
  out=saveh1 date='1dec03'd
  interval=day;
  activity task;
  succ      succ1 succ2 succ3;
  duration days;
  holiday  holiday / holidur=(holidur);
run;

title2 'Variable Length Holidays : INTERVAL=DAY';
proc sort data=saveh1;
  by e_start;
run;

proc gantt graphics data=saveh1 holidata=holidays;
  chart / compress
  font=swiss
```

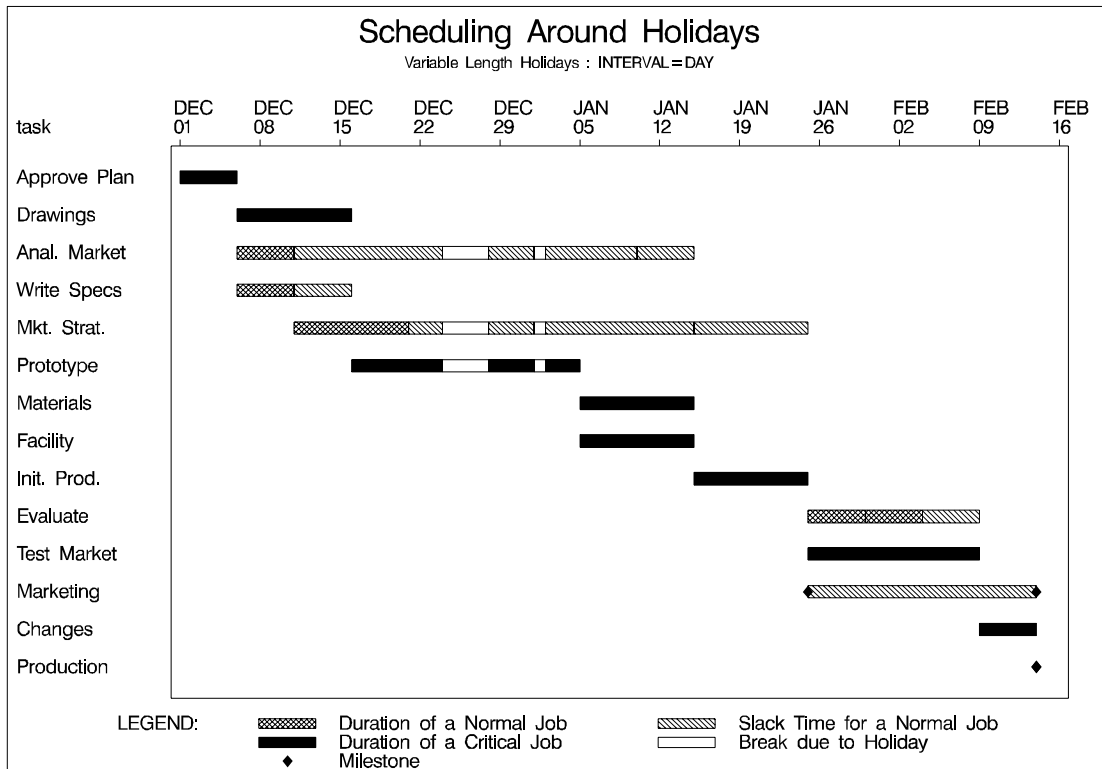
```

height=1.5 skip=2
nojobnum
dur=days increment=7
holiday=(holiday) holidur=(holidur) interval=day
cframe=ligr;

id task;
run;

```

Output 2.8.3. Scheduling around Holidays: INTERVAL=DAY



Next, suppose that work on the project is to be scheduled only on weekdays. The INTERVAL= option is set to WEEKDAY. Then, the value '4' specified for the variable holidur is interpreted as 4 weekdays. Thus, the holidays are on December 24, 25, 26, and 29, 2003, because December 27 and 28 (Saturday and Sunday) are non-working days anyway. (Note that if holifin had been used, the holiday would have ended on December 26, 2003.) The following statements schedule the project to start on December 1, 2003 with INTERVAL=WEEKDAY. Output 2.8.4 displays the resulting schedule. Note the further delay in project completion time.

```

proc cpm data=widget holidata=holidays
out=saveh2 date='1dec03'd
interval=weekday;
activity task;
succ succ1 succ2 succ3;
duration days;
holiday holiday / holidur=(holidur);
run;

```

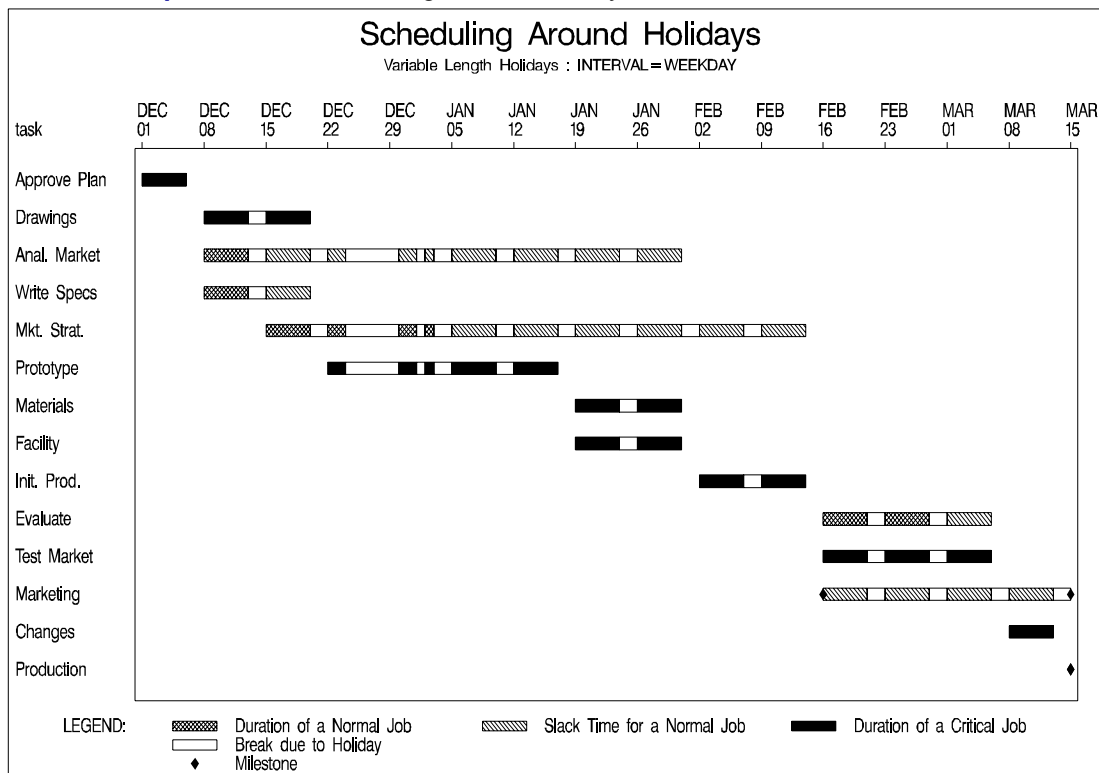
```

proc sort data=saveh2;
  by e_start;
  run;

title2 'Variable Length Holidays : INTERVAL=WEEKDAY';
proc gantt graphics data=saveh2 holidata=holidays;
  chart / compress
        font=swiss
        height=1.5 skip=2
        nojobnum
        dur=days increment=7
        holiday=(holiday)
        holidur=(holidur)
        interval=weekday
        cframe=ligr;

  id task;
  run;

```

Output 2.8.4. Scheduling around Holidays: INTERVAL=WEEKDAY

Finally, the same project is scheduled to start on December 1, 2003 with INTERVAL=WORKDAY. [Output 2.8.5](#) displays the resulting Schedule data set. Note that this time the holiday period starts at 5:00 p.m. on December 23, 2003, and ends at 9:00 a.m. on December 30, 2003.

```

proc cpm data=widget holidata=holidays
  out=saveh3 date='1dec03'd
  interval=workday;

```

```

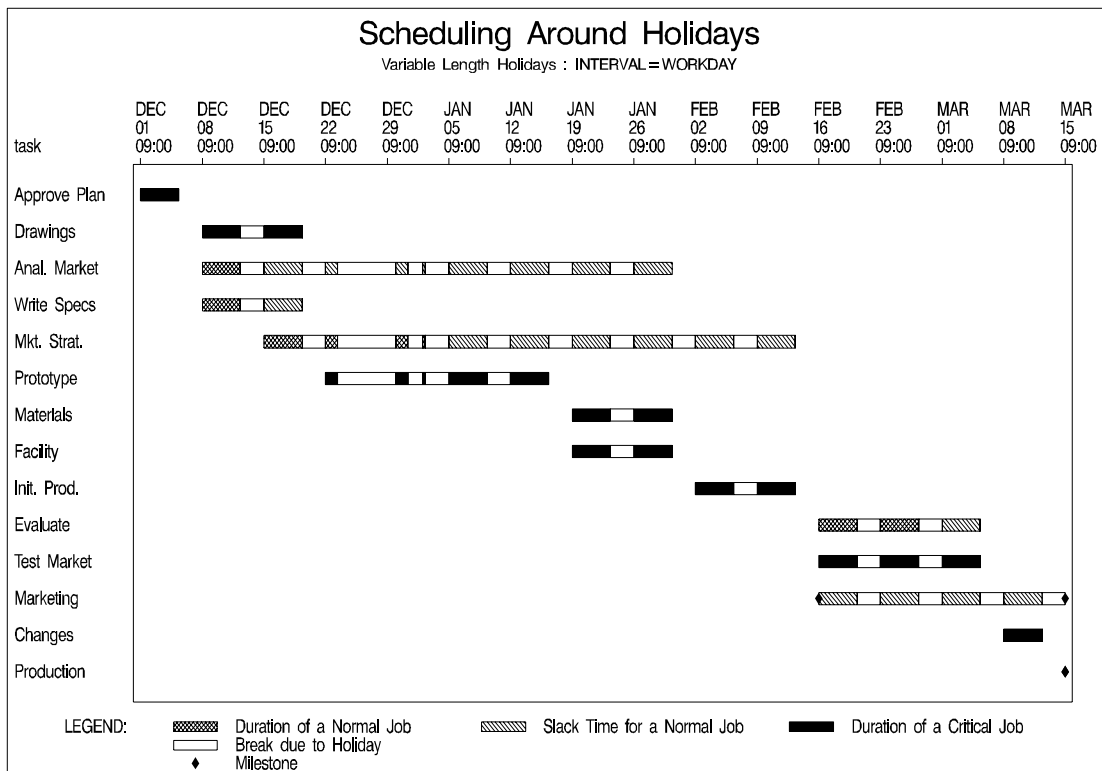
activity task;
succ      succ1 succ2 succ3;
duration days;
holiday   holiday / holidur=(holidur);
run;

proc sort data=saveh3;
  by e_start;
run;

title2 'Variable Length Holidays : INTERVAL=WORKDAY';
proc gantt graphics data=saveh3 holidata=holidays;
  chart / compress
        font=swiss height=1.5 nojobnum skip=2
        dur=days increment=7
        holiday=(holiday) holidur=(holidur) interval=workday
        cframe=ligr;
  id task;
run;

```

Output 2.8.5. Scheduling around Holidays: INTERVAL=WORKDAY



Example 2.9. CALEDATA and WORKDATA Data Sets

This example shows how you can schedule the job over a nonstandard day and a nonstandard week. In the first part of the example, the calendar followed is a six-day week with an eight-and-a-half hour workday starting at 7 a.m. The project data are the same as were used in Example 2.8, but some of the durations have been changed to include some fractional values. Output 2.9.1 shows the project data set.

Output 2.9.1. Data Set WIDGET9: Scheduling on the Six-Day Week

Scheduling on the 6-Day Week Data Set WIDGET9					
Obs	task	days	succ1	succ2	succ3
1	Approve Plan	5.5	Drawings	Anal. Market	Write Specs
2	Drawings	10.0	Prototype		
3	Anal. Market	5.0	Mkt. Strat.		
4	Write Specs	4.5	Prototype		
5	Prototype	15.0	Materials	Facility	
6	Mkt. Strat.	10.0	Test Market	Marketing	
7	Materials	10.0	Init. Prod.		
8	Facility	10.0	Init. Prod.		
9	Init. Prod.	10.0	Test Market	Marketing	Evaluate
10	Evaluate	10.0	Changes		
11	Test Market	15.0	Changes		
12	Changes	5.0	Production		
13	Production	0.0			
14	Marketing	0.0			

The same Holiday data set is used. To indicate that work is to be done on all days of the week except Sunday, use `INTERVAL=DTDAY` and define a Calendar data set with a single variable `_SUN_`, and a single observation identifying Sunday as a holiday. The DATA step creating `CALENDAR` and the invocation of `PROC CPM` is shown in the following code. [Output 2.9.2](#) displays the resulting schedule.

```

/* Set up a 6-day work week, with Sundays off */
data calendar;
  _sun_='holiday';
run;

title 'Scheduling on the 6-Day Week';
proc cpm data=widget9 holidata=holidays
  out=savec date='1dec03:07:00'dt
  interval=dtday daylength='08:30't
  calendar=calendar;
  activity task;
  succ      succ1 succ2 succ3;
  duration days;
  holiday  holiday / holifin=(holifin);
run;

```


Output 2.9.2. Scheduling on the Six-Day Week

Scheduling on the 6-Day Week Project Schedule				
Obs	task	days	E_START	E_FINISH
1	Approve Plan	5.5	01DEC03:07:00:00	06DEC03:11:14:59
2	Drawings	10.0	06DEC03:11:15:00	18DEC03:11:14:59
3	Anal. Market	5.0	06DEC03:11:15:00	12DEC03:11:14:59
4	Write Specs	4.5	06DEC03:11:15:00	11DEC03:15:29:59
5	Prototype	15.0	18DEC03:11:15:00	09JAN04:11:14:59
6	Mkt. Strat.	10.0	12DEC03:11:15:00	27DEC03:11:14:59
7	Materials	10.0	09JAN04:11:15:00	21JAN04:11:14:59
8	Facility	10.0	09JAN04:11:15:00	21JAN04:11:14:59
9	Init. Prod.	10.0	21JAN04:11:15:00	02FEB04:11:14:59
10	Evaluate	10.0	02FEB04:11:15:00	13FEB04:11:14:59
11	Test Market	15.0	02FEB04:11:15:00	19FEB04:11:14:59
12	Changes	5.0	19FEB04:11:15:00	25FEB04:11:14:59
13	Production	0.0	25FEB04:11:15:00	25FEB04:11:15:00
14	Marketing	0.0	02FEB04:11:15:00	02FEB04:11:15:00

Obs	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01DEC03:07:00:00	06DEC03:11:14:59	0.0	0.0
2	06DEC03:11:15:00	18DEC03:11:14:59	0.0	0.0
3	15JAN04:11:15:00	21JAN04:11:14:59	30.0	0.0
4	13DEC03:07:00:00	18DEC03:11:14:59	5.5	5.5
5	18DEC03:11:15:00	09JAN04:11:14:59	0.0	0.0
6	21JAN04:11:15:00	02FEB04:11:14:59	30.0	30.0
7	09JAN04:11:15:00	21JAN04:11:14:59	0.0	0.0
8	09JAN04:11:15:00	21JAN04:11:14:59	0.0	0.0
9	21JAN04:11:15:00	02FEB04:11:14:59	0.0	0.0
10	07FEB04:11:15:00	19FEB04:11:14:59	5.0	5.0
11	02FEB04:11:15:00	19FEB04:11:14:59	0.0	0.0
12	19FEB04:11:15:00	25FEB04:11:14:59	0.0	0.0
13	25FEB04:11:15:00	25FEB04:11:15:00	0.0	0.0
14	25FEB04:11:15:00	25FEB04:11:15:00	20.0	20.0

Suppose now that you want to schedule work on a five-and-a-half day week (five full working days starting on Monday and half a working day on Saturday). A full work day is from 8 a.m. to 4 p.m. [Output 2.9.3](#) shows the data set WORKDAT, which is used to define the work pattern for a full day (in the shift variable fullday and a half-day (in the shift variable halfday). [Output 2.9.4](#) displays the Calendar data set, CALDAT, which specifies the appropriate work pattern for each day of the week. The schedule produced by invoking the following program is displayed in [Output 2.9.5](#).

```
proc cpm data=widget9 holidaydata=holidays
    out=savecw date='1dec03'd
    interval=day
    workday=workdat calendar=caldat;
activity task;
succ succ1 succ2 succ3;
duration days;
holiday holiday / holifin=(holifin);
run;
```

Output 2.9.3. Workday Data Set

Scheduling on a Five-and-a-Half-Day Week			
Workdays Data Set			
Obs	fullday	halfday	
1	8:00	8:00	
2	16:00	12:00	

Output 2.9.4. Calendar Data Set

Scheduling on a Five-and-a-Half-Day Week								
Calendar Data Set								
Obs	_sun_	_mon_	_tue_	_wed_	_thu_	_fri_	_sat_	d_length
1	holiday	fullday	fullday	fullday	fullday	fullday	halfday	8:00

Output 2.9.5. Scheduling on a Five-and-a-Half Day Week

Scheduling on a Five-and-a-Half-Day Week				
Project Schedule				
Obs	task	days	E_START	E_FINISH
1	Approve Plan	5.5	01DEC03:08:00:00	06DEC03:11:59:59
2	Drawings	10.0	08DEC03:08:00:00	19DEC03:11:59:59
3	Anal. Market	5.0	08DEC03:08:00:00	12DEC03:15:59:59
4	Write Specs	4.5	08DEC03:08:00:00	12DEC03:11:59:59
5	Prototype	15.0	19DEC03:12:00:00	13JAN04:11:59:59
6	Mkt. Strat.	10.0	13DEC03:08:00:00	30DEC03:11:59:59
7	Materials	10.0	13JAN04:12:00:00	26JAN04:11:59:59
8	Facility	10.0	13JAN04:12:00:00	26JAN04:11:59:59
9	Init. Prod.	10.0	26JAN04:12:00:00	06FEB04:15:59:59
10	Evaluate	10.0	07FEB04:08:00:00	19FEB04:15:59:59
11	Test Market	15.0	07FEB04:08:00:00	26FEB04:11:59:59
12	Changes	5.0	26FEB04:12:00:00	03MAR04:15:59:59
13	Production	0.0	04MAR04:08:00:00	04MAR04:08:00:00
14	Marketing	0.0	07FEB04:08:00:00	07FEB04:08:00:00
Obs	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01DEC03:08:00:00	06DEC03:11:59:59	0.0	0.0
2	08DEC03:08:00:00	19DEC03:11:59:59	0.0	0.0
3	20JAN04:08:00:00	26JAN04:11:59:59	30.0	0.0
4	15DEC03:08:00:00	19DEC03:11:59:59	5.5	5.5
5	19DEC03:12:00:00	13JAN04:11:59:59	0.0	0.0
6	26JAN04:12:00:00	06FEB04:15:59:59	30.0	30.0
7	13JAN04:12:00:00	26JAN04:11:59:59	0.0	0.0
8	13JAN04:12:00:00	26JAN04:11:59:59	0.0	0.0
9	26JAN04:12:00:00	06FEB04:15:59:59	0.0	0.0
10	13FEB04:12:00:00	26FEB04:11:59:59	5.0	5.0
11	07FEB04:08:00:00	26FEB04:11:59:59	0.0	0.0
12	26FEB04:12:00:00	03MAR04:15:59:59	0.0	0.0
13	04MAR04:08:00:00	04MAR04:08:00:00	0.0	0.0
14	04MAR04:08:00:00	04MAR04:08:00:00	20.0	20.0

Note that, in this case, it was not necessary to specify the DAYLENGTH=, DAYSTART=, or INTERVAL= option in the PROC CPM statement. The default value of INTERVAL=DAY is assumed, and the CALDAT and WORKDAT data sets define the workday and work week completely. The length of a standard working day is also included in the Calendar data set, completing all the necessary specifications.

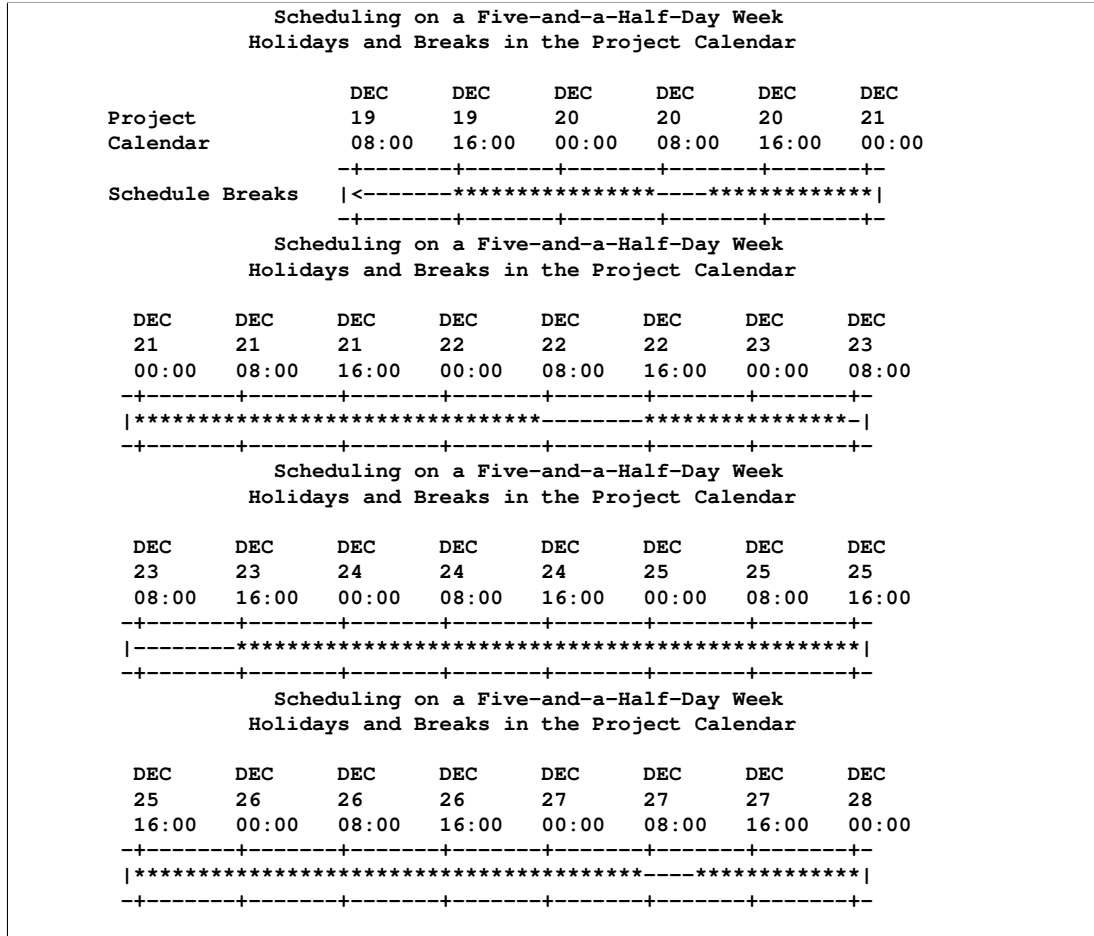
To visualize the breaks in the work schedule created by these specifications, you can use the following simple data set with a dummy activity 'Schedule Breaks' to produce a Gantt chart, shown in [Output 2.9.6](#). The period illustrated on the chart is from December 19, 2003 to December 27, 2003. The breaks are denoted by *.

```

/* To visualize the breaks, use following "dummy" data set
   to plot a schedule bar showing holidays and breaks */
data temp;
  e_start='19dec03:08:00' dt;
  e_finish='27dec03:23:59:59' dt;
  task='Schedule Breaks';
  label task='Project Calendar';
  format e_start e_finish datetime16.;
run;

options ps=20;
title2 'Holidays and Breaks in the Project Calendar';
proc gantt data=temp lineprinter
  calendar=caldat holidata=holidays
  workday=workdat;
  chart / interval=dtday mininterval=dthour skip=0
  holiday=(holiday) holifin=(holifin) markbreak
  nojobnum nolegend increment=8 holichar='*';
  id task;
run;

```

Output 2.9.6. Gantt Chart Showing Breaks and Holidays**Example 2.10. Multiple Calendars**

This example illustrates the use of multiple calendars within a project. Different scenarios are presented to show the use of different calendars and how project schedules are affected. [Output 2.10.1](#) shows the data set `WORKDATA`, which defines several shift patterns. These shift patterns are appropriately associated with three different calendars in the data set `CALEDATA`, also shown in the same output. The three calendars are defined as follows:

- The `DEFAULT` calendar has five eight-hour days (Monday through Friday) and holidays on Saturday and Sunday.
- The calendar `OVT_CAL` specifies an overtime calendar that has 10-hour work days on Monday through Friday and a half day on Saturday and a holiday on Sunday.
- The calendar `PROD_CAL` follows a more complicated work pattern: Sunday is a holiday; on Monday work is done from 8 a.m. through midnight with a two hour break from 6 p.m. to 8 p.m.; on Tuesday through Friday work is done round the clock with two 2-hour breaks from 6 a.m. to 8 a.m. and 6 p.m. to 8

p.m.; on Saturday the work shifts are from midnight to 6 a.m. and again from 8 a.m. to 6 p.m. In other words, work is done continuously from 8 a.m. on Monday morning to 6 p.m. on Saturday with two hour breaks every day at 6 a.m. and 6 p.m.

Output 2.10.1. Workday and Calendar Data Sets

Multiple Calendars Workdays Data Set						
Obs	fullday	halfday	ovtday	s1	s2	s3
1	8:00	8:00	8:00	.	8:00	.
2	16:00	12:00	18:00	6:00	18:00	6:00
3	.	.	.	8:00	20:00	8:00
4	.	.	.	18:00	.	18:00
5	.	.	.	20:00	.	.
6	.	.	.	.	.	.

Multiple Calendars CALENDAR Data Set								
Obs	cal	_sun_	_mon_	_tue_	_wed_	_thu_	_fri_	_sat_
1	DEFAULT	holiday	fullday	fullday	fullday	fullday	fullday	holiday
2	OVT_CAL	holiday	ovtday	ovtday	ovtday	ovtday	ovtday	halfday
3	PROD_CAL	holiday	s2	s1	s1	s1	s1	s3

The same set of holidays is used as in [Example 2.9](#), except that in this case the holiday for New Year’s is defined by specifying both the start and finish time for the holiday instead of defaulting to a one-day long holiday. When multiple calendars are involved, it is often less confusing to define holidays by specifying both a start and a finish time for the holiday instead of the start time and duration. [Output 2.10.2](#) displays the Holiday data set.

Output 2.10.2. Holiday Data Set

Multiple Calendars Holidays Data Set			
Obs	holiday	holifin	holidur
1	24DEC03	26DEC03	4
2	01JAN04	01JAN04	.

Note that the data set HOLIDAYS does not include any variable identifying the calendars with which to associate the holidays. By default, the procedure associates the two holiday periods with all the calendars.

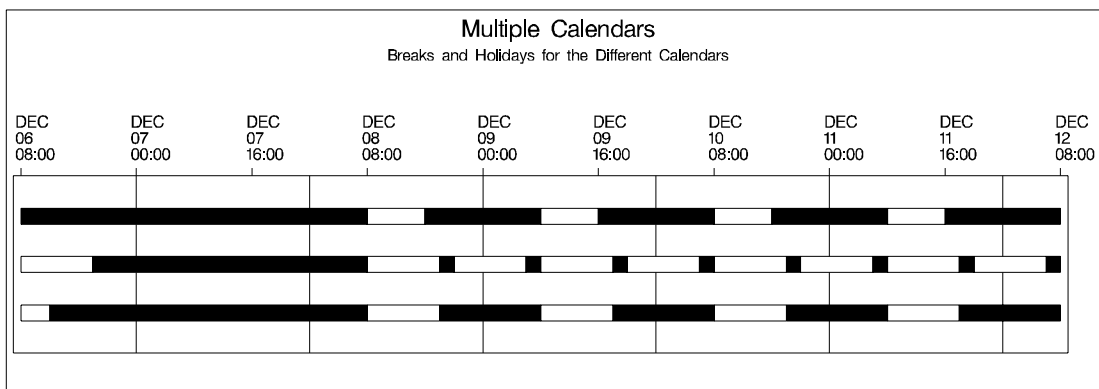
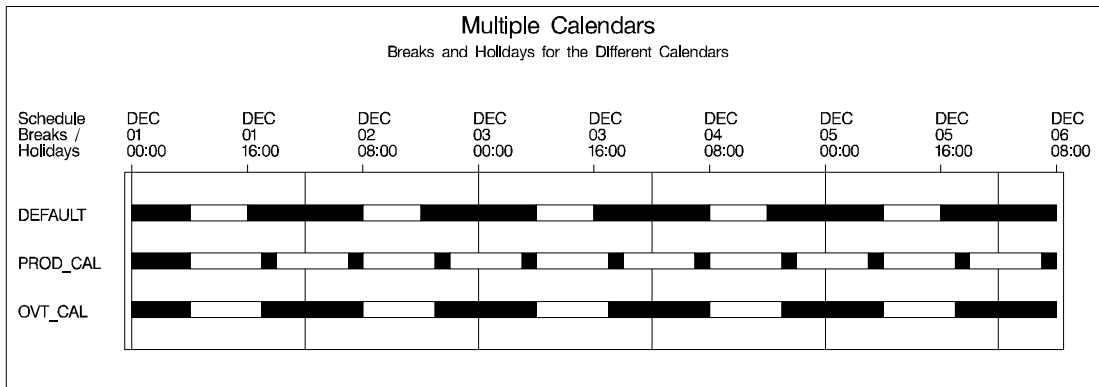
An easy way to visualize all the breaks and holidays for each calendar is to use a Gantt chart, plotting a bar for each calendar from the start of the project to January 4, 2004, with all the holiday and work shift specifications. The following program produces [Output 2.10.3](#). Note that holidays and breaks are marked with a solid fill pattern.

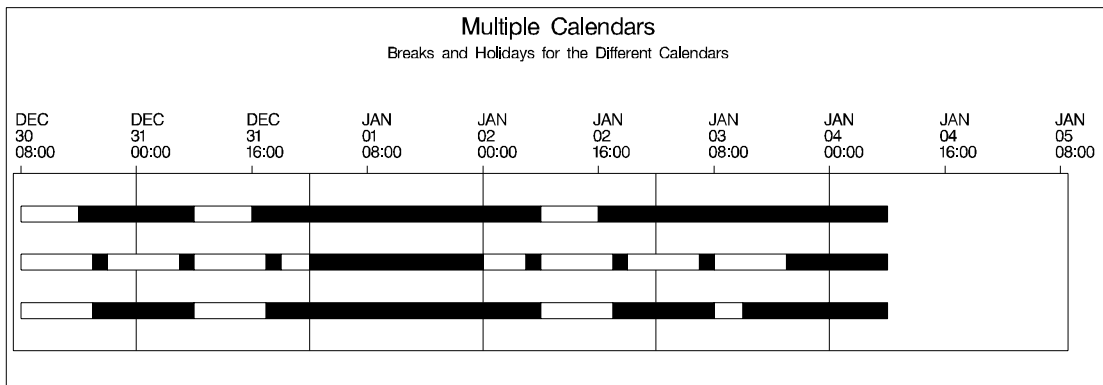
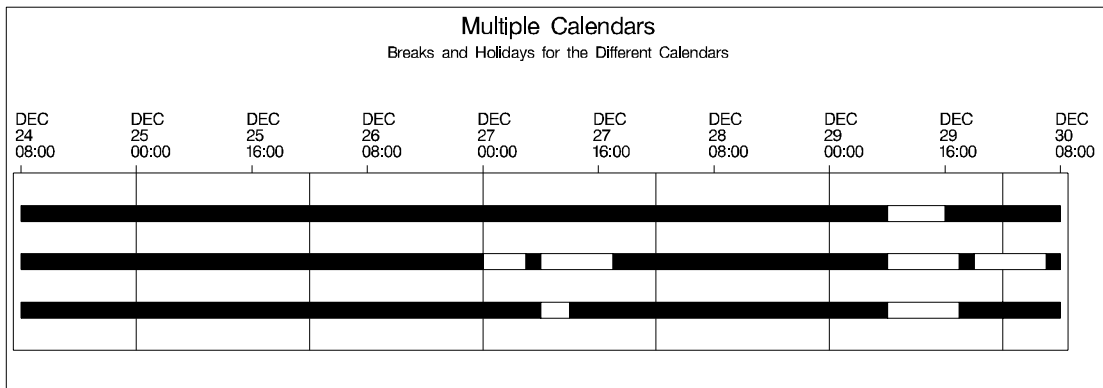
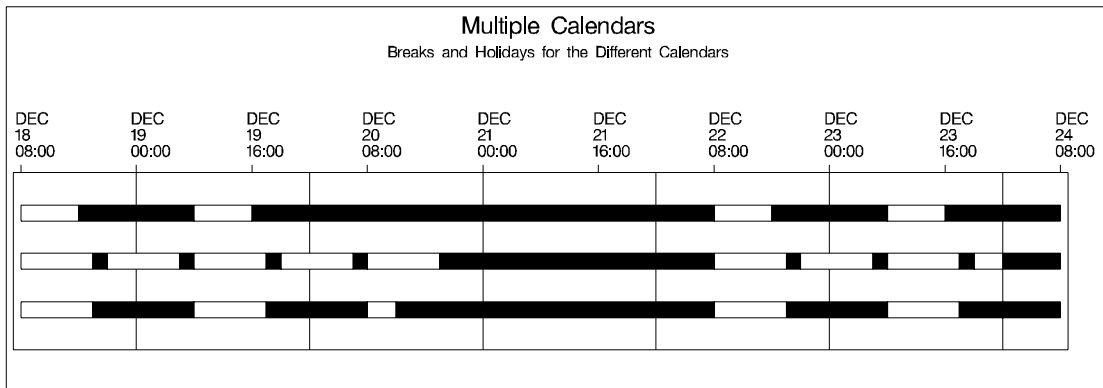
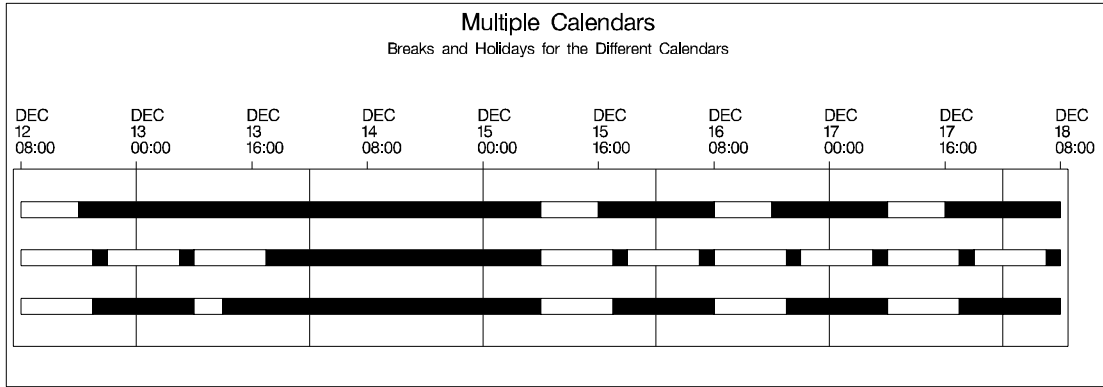
```

goptions hpos=160 vpos=25 ftext=swiss;
title h=1.5 'Multiple Calendars';
title2 'Breaks and Holidays for the Different Calendars';
proc gantt data=cals graphics
    calendar=calendar holidata=holidays
    workday=workdata;
    chart / interval=dtday mininterval=dthour skip=2
    holiday=(holiday) holifin=(holifin)
    markbreak daylength='08:00't calid=cal
    ref='1dec03:00:00'dt to '4jan04:08:00'dt by dtday
    nolegend nojobnum increment=16
    hpages=6;
id cal;
run;

```

Output 2.10.3. Gantt Chart Showing Breaks and Holidays for Multiple Calendars





The Activity data set used in [Example 2.9](#) is modified by adding a variable called `cal`, which sets the calendar to be 'PROD_CAL' for the activity 'Production', and 'OVT_CAL' for the activity 'Prototype', and the DEFAULT calendar for the other activities. Thus, in both the Activity data set and the Calendar data set, the calendar information is conveyed through a CALID variable, `cal`.

PROC CPM is first invoked without reference to the CALID variable. Thus, the procedure recognizes only the first observation in the Calendar data set (a warning is printed to the log to this effect), and only the default calendar is used for all activities in the project. The `daylength` parameter is interpreted as the length of a standard work day; all the durations are assumed to be in units of this standard work day. [Output 2.10.4](#) displays the schedule obtained. Note that the project is scheduled to finish on March 12, 2004, at 12 noon.

```
data widgcal;
  set widget9;
  if task = 'Production' then      cal = 'PROD_CAL';
  else if task = 'Prototype' then  cal = 'OVT_CAL';
  else                             cal = 'DEFAULT';
run;

proc cpm date='01dec03'd data=widgcal out=scheddef
  holidaydata=holidays daylength='08:00't
  workday=workdata
  calendar=calendar;
  holiday holiday / holifin = holifin;
  activity task;
  duration days;
  successor succ1 succ2 succ3;
run;

title2 'Project Schedule: Default calendar';
proc print;
  var task days e_start e_finish l_start l_finish
  t_float f_float;
run;
```


Output 2.10.4. Schedule Using Default Calendar

Multiple Calendars				
Project Schedule: Default calendar				
Obs	task	days	E_START	E_FINISH
1	Approve Plan	5.5	01DEC03:08:00:00	08DEC03:11:59:59
2	Drawings	10.0	08DEC03:12:00:00	22DEC03:11:59:59
3	Anal. Market	5.0	08DEC03:12:00:00	15DEC03:11:59:59
4	Write Specs	4.5	08DEC03:12:00:00	12DEC03:15:59:59
5	Prototype	15.0	22DEC03:12:00:00	16JAN04:11:59:59
6	Mkt. Strat.	10.0	15DEC03:12:00:00	02JAN04:11:59:59
7	Materials	10.0	16JAN04:12:00:00	30JAN04:11:59:59
8	Facility	10.0	16JAN04:12:00:00	30JAN04:11:59:59
9	Init. Prod.	10.0	30JAN04:12:00:00	13FEB04:11:59:59
10	Evaluate	10.0	13FEB04:12:00:00	27FEB04:11:59:59
11	Test Market	15.0	13FEB04:12:00:00	05MAR04:11:59:59
12	Changes	5.0	05MAR04:12:00:00	12MAR04:11:59:59
13	Production	0.0	12MAR04:12:00:00	12MAR04:12:00:00
14	Marketing	0.0	13FEB04:12:00:00	13FEB04:12:00:00

Obs	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01DEC03:08:00:00	08DEC03:11:59:59	0.0	0.0
2	08DEC03:12:00:00	22DEC03:11:59:59	0.0	0.0
3	23JAN04:12:00:00	30JAN04:11:59:59	30.0	0.0
4	16DEC03:08:00:00	22DEC03:11:59:59	5.5	5.5
5	22DEC03:12:00:00	16JAN04:11:59:59	0.0	0.0
6	30JAN04:12:00:00	13FEB04:11:59:59	30.0	30.0
7	16JAN04:12:00:00	30JAN04:11:59:59	0.0	0.0
8	16JAN04:12:00:00	30JAN04:11:59:59	0.0	0.0
9	30JAN04:12:00:00	13FEB04:11:59:59	0.0	0.0
10	20FEB04:12:00:00	05MAR04:11:59:59	5.0	5.0
11	13FEB04:12:00:00	05MAR04:11:59:59	0.0	0.0
12	05MAR04:12:00:00	12MAR04:11:59:59	0.0	0.0
13	12MAR04:12:00:00	12MAR04:12:00:00	0.0	0.0
14	12MAR04:12:00:00	12MAR04:12:00:00	20.0	20.0

Next PROC CPM is invoked with the CALID statement identifying the variable CAL in the Activity and Calendar data sets. Recall that the two activities, 'Production' and 'Prototype', do not follow the default calendar. The schedule displayed in [Output 2.10.5](#) shows that, due to longer working hours for these two activities in the project, the scheduled finish date is now March 8, at 10:00 a.m.

```

proc cpm date='01dec03'd data=widgcal out=schedmc
    holidaydata=holidays daylength='08:00't
    workday=workdata
    calendar=calendar;
    holiday holiday / holifin = holifin;
    activity task;
    duration days;
    successor succ1 succ2 succ3;
    calid cal;
run;

title2 'Project Schedule: Three Calendars';
proc print;

```

```
var task days cal e_ l_ t_float f_float;
run;
```

Output 2.10.5. Schedule Using Three Calendars

Multiple Calendars					
Project Schedule: Three Calendars					
Obs	task	days	cal	E_START	E_FINISH
1	Approve Plan	5.5	DEFAULT	01DEC03:08:00:00	08DEC03:11:59:59
2	Drawings	10.0	DEFAULT	08DEC03:12:00:00	22DEC03:11:59:59
3	Anal. Market	5.0	DEFAULT	08DEC03:12:00:00	15DEC03:11:59:59
4	Write Specs	4.5	DEFAULT	08DEC03:12:00:00	12DEC03:15:59:59
5	Prototype	15.0	OVT_CAL	22DEC03:12:00:00	12JAN04:09:59:59
6	Mkt. Strat.	10.0	DEFAULT	15DEC03:12:00:00	02JAN04:11:59:59
7	Materials	10.0	DEFAULT	12JAN04:10:00:00	26JAN04:09:59:59
8	Facility	10.0	DEFAULT	12JAN04:10:00:00	26JAN04:09:59:59
9	Init. Prod.	10.0	DEFAULT	26JAN04:10:00:00	09FEB04:09:59:59
10	Evaluate	10.0	DEFAULT	09FEB04:10:00:00	23FEB04:09:59:59
11	Test Market	15.0	DEFAULT	09FEB04:10:00:00	01MAR04:09:59:59
12	Changes	5.0	DEFAULT	01MAR04:10:00:00	08MAR04:09:59:59
13	Production	0.0	PROD_CAL	08MAR04:10:00:00	08MAR04:10:00:00
14	Marketing	0.0	DEFAULT	09FEB04:10:00:00	09FEB04:10:00:00

Obs	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01DEC03:08:00:00	08DEC03:11:59:59	0.00	0.00
2	08DEC03:12:00:00	22DEC03:11:59:59	0.00	0.00
3	19JAN04:10:00:00	26JAN04:09:59:59	25.75	0.00
4	16DEC03:08:00:00	22DEC03:11:59:59	5.50	5.50
5	22DEC03:12:00:00	12JAN04:09:59:59	0.00	0.00
6	26JAN04:10:00:00	09FEB04:09:59:59	25.75	25.75
7	12JAN04:10:00:00	26JAN04:09:59:59	0.00	0.00
8	12JAN04:10:00:00	26JAN04:09:59:59	0.00	0.00
9	26JAN04:10:00:00	09FEB04:09:59:59	0.00	0.00
10	16FEB04:10:00:00	01MAR04:09:59:59	5.00	5.00
11	09FEB04:10:00:00	01MAR04:09:59:59	0.00	0.00
12	01MAR04:10:00:00	08MAR04:09:59:59	0.00	0.00
13	08MAR04:10:00:00	08MAR04:10:00:00	0.00	0.00
14	08MAR04:10:00:00	08MAR04:10:00:00	20.00	20.00

Now suppose that the engineer in charge of writing specifications requests a seven-day vacation from December 8, 2003. How is the project completion time going to be affected? A new calendar, `Eng_cal`, is defined that has the same work pattern as the default calendar, but it also contains an extra vacation period. [Output 2.10.6](#) displays the data sets `HOLIDATA` and `CALEDATA`, which contain information about the new calendar. The fourth observation in the data set `CALEDATA` has missing values for the variables `_sun_`, ..., `_sat_`, indicating that the calendar, `Eng_cal`, follows the same work pattern as the default calendar.

Output 2.10.6. HOLIDATA and CALEDATA Data Sets

Multiple Calendars Holidays Data Set					
Obs	holiday	holifin	holidur	cal	
1	08DEC03	.	7	Eng_cal	
2	24DEC03	26DEC03	.		
3	01JAN04	01JAN04	.		

Multiple Calendars Calendar Data Set								
Obs	cal	_sun_	_mon_	_tue_	_wed_	_thu_	_fri_	_sat_
1	DEFAULT	holiday	fullday	fullday	fullday	fullday	fullday	holiday
2	OVT_CAL	holiday	ovtday	ovtday	ovtday	ovtday	ovtday	halfday
3	PROD_CAL	holiday	s2	s1	s1	s1	s1	s3
4	Eng_cal							

Once again, in the following code, PROC GANTT is used to compare the new calendar with the default calendar, as shown in [Output 2.10.7](#). Note that the breaks and holidays are marked with a solid fill pattern.

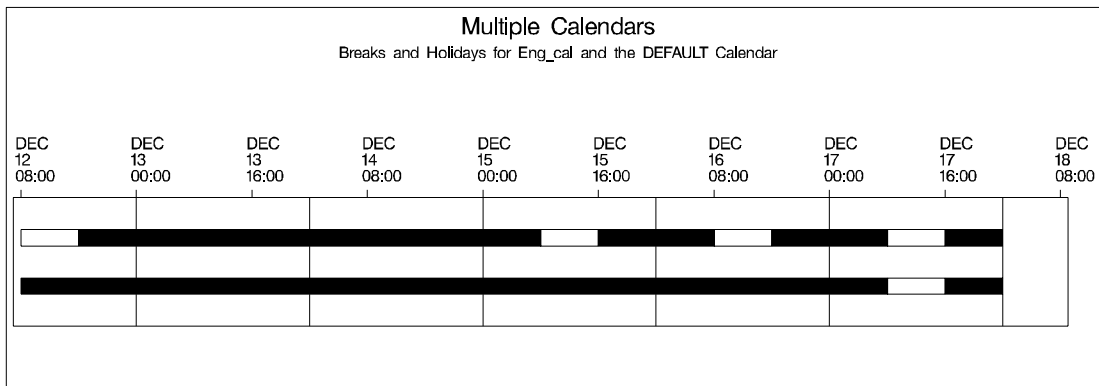
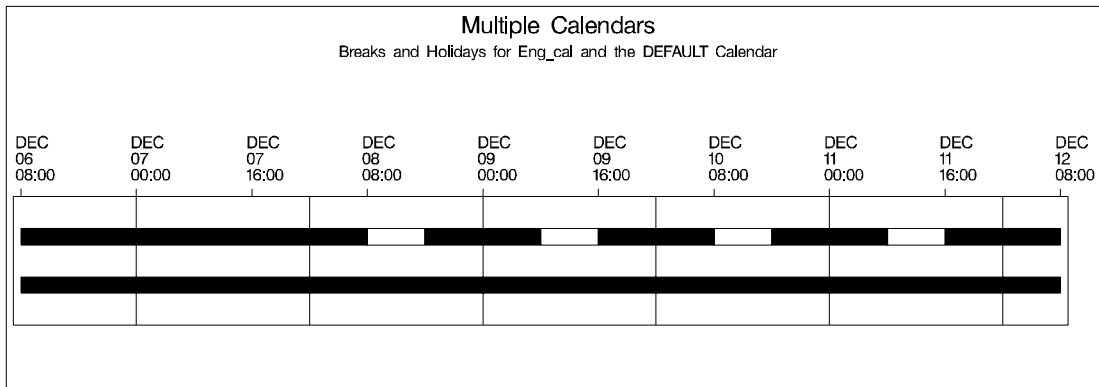
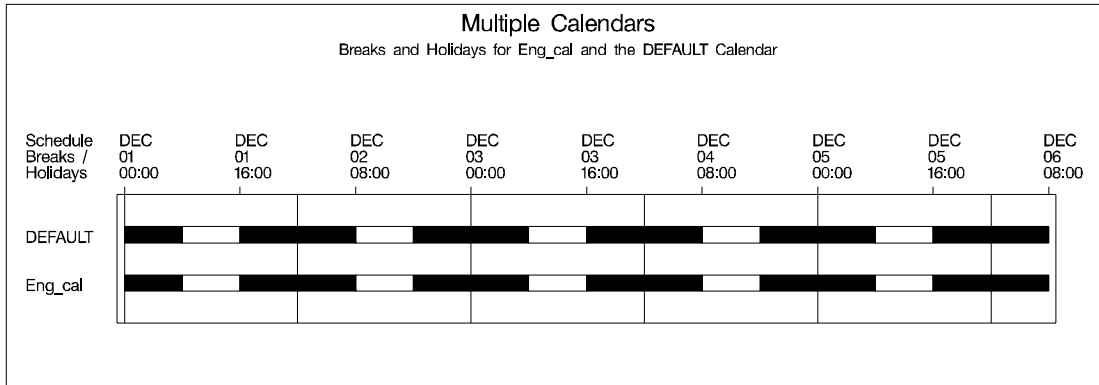
```

/* Create a data set to illustrate holidays with PROC GANTT */
data cals2;
  e_start='1dec03:00:00'dt;
  e_finish='18dec03:00:00'dt;
  label cal = 'Schedule Breaks / Holidays';
  format e_start e_finish datetimet16.;
  length cal $8.;
  cal='DEFAULT' ; output;
  cal='Eng_cal' ; output;
run;

title2 'Breaks and Holidays for Eng_cal and the DEFAULT Calendar';
proc gantt data=cals2 graphics
  calendar=caledata holidata=holidata
  workday=workdata;
  chart / interval=dtday mininterval=dthour skip=2
  holiday=(holiday) holifin=(holifin) holidur=(holidur)
  markbreak daylength='08:00't calid=cal
  ref='1dec03:00:00'dt to '18dec03:00:00'dt by dtday
  nojobnum nolegend increment=16 hpages=3;
  id cal;
run;

```

Output 2.10.7. Difference between Eng_cal and DEFAULT Calendar



The Activity data set is modified to redefine the calendar for the task ‘Write Specs’. PROC CPM is invoked, and [Output 2.10.8](#) shows the new schedule obtained. Note the effect of the Engineer’s vacation on the project completion time. The project is now scheduled to finish at 10 a.m. on March 9, 2004; in effect, the delay is only one day, even though the planned vacation period is seven days. This is due to the fact that the activity ‘Write Specs’, which follows the new calendar, had some slack time present in its original schedule; however, this activity has now become critical.

```
data widgvac;
  set widgcal;
```

```

if task = 'Write Specs' then cal = 'Eng_cal';
run;

proc cpm date='01dec03'd data=widgvac out=schedvac
    holidaydata=holiday daylength='08:00't
    workday=workdata
    calendar=caledata;
    holiday holiday / holifin = holifin holidur=holidur;
    activity task;
    duration days;
    successor succ1 succ2 succ3;
    calid cal;
run;

title2 'Project Schedule: Four Calendars';
proc print;
    var task days cal e_ l_ t_float f_float;
run;

```

Output 2.10.8. Schedule Using Four Calendars

Multiple Calendars					
Project Schedule: Four Calendars					
Obs	task	days	cal	E_START	E_FINISH
1	Approve Plan	5.5	DEFAULT	01DEC03:08:00:00	08DEC03:11:59:59
2	Drawings	10.0	DEFAULT	08DEC03:12:00:00	22DEC03:11:59:59
3	Anal. Market	5.0	DEFAULT	08DEC03:12:00:00	15DEC03:11:59:59
4	Write Specs	4.5	Eng_cal	17DEC03:08:00:00	23DEC03:11:59:59
5	Prototype	15.0	OVT_CAL	23DEC03:12:00:00	13JAN04:09:59:59
6	Mkt. Strat.	10.0	DEFAULT	15DEC03:12:00:00	02JAN04:11:59:59
7	Materials	10.0	DEFAULT	13JAN04:10:00:00	27JAN04:09:59:59
8	Facility	10.0	DEFAULT	13JAN04:10:00:00	27JAN04:09:59:59
9	Init. Prod.	10.0	DEFAULT	27JAN04:10:00:00	10FEB04:09:59:59
10	Evaluate	10.0	DEFAULT	10FEB04:10:00:00	24FEB04:09:59:59
11	Test Market	15.0	DEFAULT	10FEB04:10:00:00	02MAR04:09:59:59
12	Changes	5.0	DEFAULT	02MAR04:10:00:00	09MAR04:09:59:59
13	Production	0.0	PROD_CAL	09MAR04:10:00:00	09MAR04:10:00:00
14	Marketing	0.0	DEFAULT	10FEB04:10:00:00	10FEB04:10:00:00

Obs	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	02DEC03:08:00:00	09DEC03:11:59:59	1.00	0.00
2	09DEC03:12:00:00	23DEC03:11:59:59	1.00	1.00
3	20JAN04:10:00:00	27JAN04:09:59:59	26.75	0.00
4	17DEC03:08:00:00	23DEC03:11:59:59	0.00	0.00
5	23DEC03:12:00:00	13JAN04:09:59:59	0.00	0.00
6	27JAN04:10:00:00	10FEB04:09:59:59	26.75	26.75
7	13JAN04:10:00:00	27JAN04:09:59:59	0.00	0.00
8	13JAN04:10:00:00	27JAN04:09:59:59	0.00	0.00
9	27JAN04:10:00:00	10FEB04:09:59:59	0.00	0.00
10	17FEB04:10:00:00	02MAR04:09:59:59	5.00	5.00
11	10FEB04:10:00:00	02MAR04:09:59:59	0.00	0.00
12	02MAR04:10:00:00	09MAR04:09:59:59	0.00	0.00
13	09MAR04:10:00:00	09MAR04:10:00:00	0.00	0.00
14	09MAR04:10:00:00	09MAR04:10:00:00	20.00	20.00

Example 2.11. Nonstandard Relationships

This example shows the use of LAG variables to describe nonstandard relationships. Consider the project network in AON format. [Output 2.11.1](#) shows the data set WIDGLAG, which contains the required project information; here the data set contains only one successor variable, requiring multiple observations for activities that have more than one immediate successor. In addition, the data set contains two new variables, `lagdur` and `lagdurc`, which are used to convey nonstandard relationships that exist between some of the activities. In the first part of the example, `lagdur` specifies a lag type and lag duration between activities; in the second part, the variable `lagdurc` specifies a lag calendar in addition to the lag type and lag duration. Note that when multiple successor variables are used, you can specify multiple lag variables and the lag values specified are matched one-for-one with the corresponding successor variables.

Output 2.11.1. Network Data

Nonstandard Relationships Activity Data Set WIDGLAG					
Obs	task	days	succ	lagdur	lagdurc
1	Approve Plan	5	Drawings		
2	Approve Plan	5	Anal. Market		
3	Approve Plan	5	Write Specs		
4	Drawings	10	Prototype		
5	Anal. Market	5	Mkt. Strat.		
6	Write Specs	5	Prototype		
7	Prototype	15	Materials	ss_9	ss_9
8	Prototype	15	Facility	ss_9	ss_9
9	Mkt. Strat.	10	Test Market		
10	Mkt. Strat.	10	Marketing		
11	Materials	10	Init. Prod.		
12	Facility	10	Init. Prod.	fs_2	fs_2_SEVENDAY
13	Init. Prod.	10	Test Market		
14	Init. Prod.	10	Marketing		
15	Init. Prod.	10	Evaluate		
16	Evaluate	10	Changes		
17	Test Market	15	Changes		
18	Changes	5	Production		
19	Production	0			
20	Marketing	0			

Suppose that the project calendar follows a five-day work week. Recall from [Example 2.6](#) that the project finishes on March 8, 2004. The data set, WIDGLAG, specifies that there is a 'ss_9' lag between the activities 'Prototype' and 'Materials', which means that you can start acquiring raw materials nine days after the start of the activity 'Prototype' instead of waiting until its finish time. Likewise, there is an 'ss_9' lag between 'Prototype' and 'Facility'. The 'fs_2' lag between 'Facility' and 'Init. Prod' indicates that you should wait two days after the completion of the 'Facility' task before starting the initial production. To convey the lag information to PROC CPM, use the LAG= specification in the SUCCESSOR statement. The program and the resulting output ([Output 2.11.2](#)) follow.

```
proc cpm data=widglag date='1dec03'd
      interval=weekday collapse out=lagsched;
```

```

activity task;
succ      succ / lag = (lagdur);
duration days;
run;

```

Output 2.11.2. Project Schedule: Default LAG Calendar

Nonstandard Relationships						
Lag Type and Duration: Default LAG Calendar						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	01DEC03	05DEC03	01DEC03	05DEC03	0	0
Drawings	08DEC03	19DEC03	08DEC03	19DEC03	0	0
Anal. Market	08DEC03	12DEC03	13JAN04	19JAN04	26	0
Write Specs	08DEC03	12DEC03	15DEC03	19DEC03	5	5
Prototype	22DEC03	09JAN04	22DEC03	09JAN04	0	0
Mkt. Strat.	15DEC03	26DEC03	20JAN04	02FEB04	26	26
Materials	02JAN04	15JAN04	06JAN04	19JAN04	2	2
Facility	02JAN04	15JAN04	02JAN04	15JAN04	0	0
Init. Prod.	20JAN04	02FEB04	20JAN04	02FEB04	0	0
Evaluate	03FEB04	16FEB04	10FEB04	23FEB04	5	5
Test Market	03FEB04	23FEB04	03FEB04	23FEB04	0	0
Changes	24FEB04	01MAR04	24FEB04	01MAR04	0	0
Production	02MAR04	02MAR04	02MAR04	02MAR04	0	0
Marketing	03FEB04	03FEB04	02MAR04	02MAR04	20	20

Note that due to the change in the type of precedence constraint (from the default 'fs_0' to 'ss_9'), the project finishes earlier, on March 2, 2004, instead of on March 8, 2004 (compare with [Output 2.6.1](#)).

By default, all the lags are assumed to follow the default calendar for the project. In this case, the default project calendar has five workdays (since `INTERVAL=WEEKDAY`). Suppose now that the 'fs_2' lag between 'Facility' and 'Init. Prod.' really indicates two calendar days and not two workdays. (Perhaps you want to allow two days for the paint to dry or the building to be ventilated.) The variable `lagdurc` in the `WIDGLAG` data set indicates the calendar for this lag by specifying the lag to be 'fs_2_sevenday' where 'sevenday' is the name of the seven-day calendar defined in the `Calendar` data set, `CALENDAR`, displayed in [Output 2.11.3](#). `PROC CPM` is invoked with `LAG=lagdurc` and [Output 2.11.4](#) displays the resulting schedule. Note that the project now finishes on March 1, 2004.

```

proc cpm data=widglag date='1dec03'd calendar=calendar
interval=weekday collapse out=lagsched;
activity task;
succ      succ / lag = (lagdurc);
duration days;
run;

```

Output 2.11.3. Calendar Data Set

Nonstandard Relationships Calendar Data Set								
Obs	_cal_	_sun_	_mon_	_tue_	_wed_	_thu_	_fri_	_sat_
1	SEVENDAY	workday	workday	workday	workday	workday	workday	workday

Output 2.11.4. Project Schedule: Lag Type, Duration, and Calendar

Nonstandard Relationships Lag Type, Duration, and Calendar						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	01DEC03	05DEC03	02DEC03	08DEC03	1	0
Drawings	08DEC03	19DEC03	09DEC03	22DEC03	1	0
Anal. Market	08DEC03	12DEC03	12JAN04	16JAN04	25	0
Write Specs	08DEC03	12DEC03	16DEC03	22DEC03	6	5
Prototype	22DEC03	09JAN04	23DEC03	12JAN04	1	0
Mkt. Strat.	15DEC03	26DEC03	19JAN04	30JAN04	25	25
Materials	02JAN04	15JAN04	05JAN04	16JAN04	1	1
Facility	02JAN04	15JAN04	05JAN04	16JAN04	1	1
Init. Prod.	19JAN04	30JAN04	19JAN04	30JAN04	0	0
Evaluate	02FEB04	13FEB04	09FEB04	20FEB04	5	5
Test Market	02FEB04	20FEB04	02FEB04	20FEB04	0	0
Changes	23FEB04	27FEB04	23FEB04	27FEB04	0	0
Production	01MAR04	01MAR04	01MAR04	01MAR04	0	0
Marketing	02FEB04	02FEB04	01MAR04	01MAR04	20	20

In fact, you can specify an alternate calendar for *all* the lag durations by using the `ALAGCAL=` or `NLAGCAL=` option in the `SUCCESSOR` statement. The next invocation of the CPM procedure illustrates this feature by specifying `ALAGCAL=SEVENDAY` in the `SUCCESSOR` statement. Thus, all the lag durations now follow the seven-day calendar instead of the five-day calendar, which is the default calendar for this project. [Output 2.11.5](#) shows the resulting schedule. Note that now the project finishes on February 27, 2004. [Output 2.11.6](#) displays a precedence Gantt chart of the project. Note how the nonstandard precedence constraints are displayed.

```
proc cpm data=widglag date='1dec03'd calendar=calendar
      interval=weekday collapse out=lagsched;
  activity task;
  succ      succ / lag = (lagdur) alagcal=sevenday;
  duration days;
run;

goptions hpos=100 vpos=60;
title  c=black f=swiss h=2.5 'Nonstandard Relationships';
title2 c=black f=swiss h=2   'Precedence Gantt Chart';
title3 ' ';

proc gantt graphics data=lagsched logic=widglag;
      chart / compress act=task succ=(succ) dur=days
```



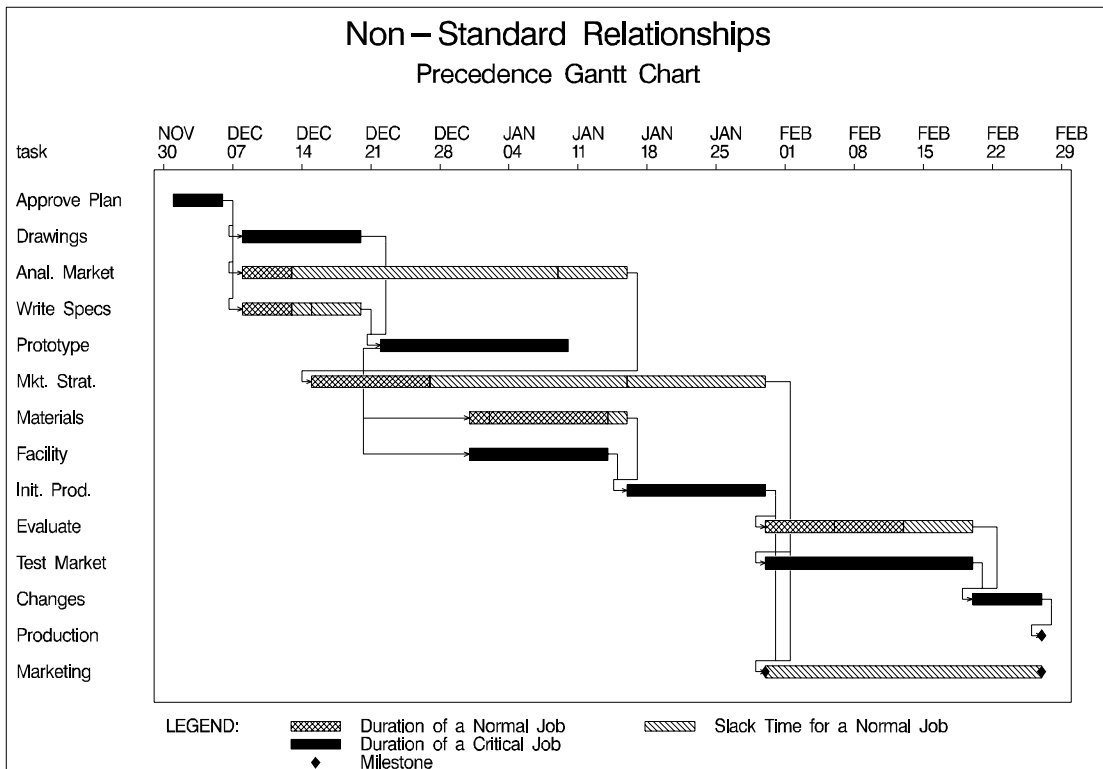
```

font=swiss
cprec=black cmile=blue
caxis=black cfram=cyan
height=1.5 skip=2 nojobnum
dur=days increment=7 lag=(lagdur);
id task;
run;
    
```

Output 2.11.5. Project Schedule: LAG Calendar = SEVENDAY

Nonstandard Relationships						
Lag Type and Duration: LAG Calendar = SEVENDAY						
task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	01DEC03	05DEC03	01DEC03	05DEC03	0	0
Drawings	08DEC03	19DEC03	08DEC03	19DEC03	0	0
Anal. Market	08DEC03	12DEC03	09JAN04	15JAN04	24	0
Write Specs	08DEC03	12DEC03	15DEC03	19DEC03	5	5
Prototype	22DEC03	09JAN04	22DEC03	09JAN04	0	0
Mkt. Strat.	15DEC03	26DEC03	16JAN04	29JAN04	24	24
Materials	31DEC03	13JAN04	02JAN04	15JAN04	2	2
Facility	31DEC03	13JAN04	31DEC03	13JAN04	0	0
Init. Prod.	16JAN04	29JAN04	16JAN04	29JAN04	0	0
Evaluate	30JAN04	12FEB04	06FEB04	19FEB04	5	5
Test Market	30JAN04	19FEB04	30JAN04	19FEB04	0	0
Changes	20FEB04	26FEB04	20FEB04	26FEB04	0	0
Production	27FEB04	27FEB04	27FEB04	27FEB04	0	0
Marketing	30JAN04	30JAN04	27FEB04	27FEB04	20	20

Output 2.11.6. Precedence Gantt Chart



Example 2.12. Activity Time Constraints

Often, in addition to a project start date or a project finish date, there may be other time constraints imposed selectively on the activities in the project. The `ALIGNDATE` and `ALIGNTYPE` statements enable you to add various types of time constraints on the activities. In this example, the data set `WIDGET12` displayed in [Output 2.12.1](#) contains two variables, `adate` and `atype`, which enable you to specify these restrictions. For example, the activity ‘Drawings’ has an ‘feq’ (Finish Equals) constraint, requiring it to finish on the 15th of December. The activity ‘Test Market’ has a *mandatory* start date imposed on it.

Output 2.12.1. Activity Data Set `WIDGET12`

Activity Time Constraints							
Activity data set							
Obs	task	days	succ1	succ2	succ3	adate	atype
1	Approve Plan	5	Drawings	Anal. Market	Write Specs	.	.
2	Drawings	10	Prototype			15DEC03	feq
3	Anal. Market	5	Mkt. Strat.			.	.
4	Write Specs	5	Prototype			15DEC03	sge
5	Prototype	15	Materials	Facility		.	.
6	Mkt. Strat.	10	Test Market	Marketing		.	.
7	Materials	10	Init. Prod.			.	.
8	Facility	10	Init. Prod.			.	.
9	Init. Prod.	10	Test Market	Marketing	Evaluate	.	.
10	Evaluate	10	Changes			27FEB04	fle
11	Test Market	15	Changes			16FEB04	ms
12	Changes	5	Production			.	.
13	Production	0				.	.
14	Marketing	0				.	.

The following statements are needed to schedule the project subject to these restrictions. The option `XFERVARS` in the `PROC CPM` statement causes CPM to transfer all variables that were used in the analysis to the Schedule data set. [Output 2.12.2](#) shows the resulting schedule.

```
proc cpm data=widget12 date='1dec03'd
  xfervars interval=weekday;
  activity task;
  successor succ1 succ2 succ3;
  duration days;
  aligndate adate;
  aligntype atype;
run;

options ls=90;
title 'Activity Time Constraints';
title2 'Aligned Schedule';
proc print;
  id task;
  var adate atype e_ l_ t_float f_float;
run;
```

Output 2.12.2. Aligned Schedule

Activity Time Constraints								
Aligned Schedule								
task	adate	atype	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Approve Plan	.		01DEC03	05DEC03	25NOV03	01DEC03	-4	-4
Drawings	15DEC03	feq	08DEC03	19DEC03	02DEC03	15DEC03	-4	-4
Anal. Market	.		08DEC03	12DEC03	26JAN04	30JAN04	35	0
Write Specs	15DEC03	sge	15DEC03	19DEC03	22DEC03	26DEC03	5	0
Prototype	.		22DEC03	09JAN04	29DEC03	16JAN04	5	0
Mkt. Strat.	.		15DEC03	26DEC03	02FEB04	13FEB04	35	30
Materials	.		12JAN04	23JAN04	19JAN04	30JAN04	5	0
Facility	.		12JAN04	23JAN04	19JAN04	30JAN04	5	0
Init. Prod.	.		26JAN04	06FEB04	02FEB04	13FEB04	5	0
Evaluate	27FEB04	fle	09FEB04	20FEB04	16FEB04	27FEB04	5	5
Test Market	16FEB04	ms	16FEB04	05MAR04	16FEB04	05MAR04	0	0
Changes	.		08MAR04	12MAR04	08MAR04	12MAR04	0	0
Production	.		15MAR04	15MAR04	15MAR04	15MAR04	0	0
Marketing	.		09FEB04	09FEB04	15MAR04	15MAR04	25	25

Note that the MS and MF constraints are *mandatory* and override any precedence constraints; thus, both the late start and early start times for the activity ‘Test Market’ coincide with February 16, 2004. However, the other types of constraints are not mandatory; they are superseded by any constraints imposed by the precedence relationships. In other words, neither the early start nor the late start schedule violate precedence constraints. Thus, even though the activity ‘Drawings’ is required to finish on the 15th of December (by the ‘feq’ constraint), the early start schedule causes it to finish on the 19th of December because of its predecessor’s schedule. This type of inconsistency is indicated by the presence of negative floats for some of the activities alerting you to the fact that if some of these deadlines are to be met, these activities must start earlier than the early start schedule. Such activities are called *supercritical*.

Example 2.13. Progress Update and Target Schedules

This example shows the use of the ACTUAL and BASELINE statements to track and compare a project’s progress with the original planned schedule. Consider the data in Example 2.1, for the network in AON format. Suppose that the project has started as scheduled on December 1, 2003, and that the current date is December 19, 2003. You may want to enter the actual dates for the activities that are already in progress or have been completed and use the CPM procedure to determine the schedule for activities that remain to be done. In addition to computing an updated schedule, you may want to check the progress of the project by comparing the current schedule with the planned schedule.

The BASELINE statement enables you to save a target schedule in the Schedule data set. In this example, suppose that you want to try to schedule the activities according to the project’s early start schedule. As a first step, schedule the project with PROC CPM, and use the SET= option in the BASELINE statement to save the early start and finish times as the baseline start and finish times. The following program saves the baseline schedule (in the variables B_START and B_FINISH), and Output 2.13.1 displays the resulting output data set.

```
data holidays;
  format holiday holifin date7.;
```

```

        input holiday & date7. holifin & date7. holidur;
        datalines;
24dec03 26dec03 4
01jan04 . .
;

* store early schedule as the baseline schedule;

proc cpm data=widget holidata=holidays
        out=widgbase date='1dec03'd;
        activity task;
        succ      succ1 succ2 succ3;
        duration days;
        holiday holiday / holifin=(holifin);
        baseline / set=early;
run;

```

Output 2.13.1. Target Schedule

Progress Update and Target Schedules Set Baseline Schedule							
Obs	task	succ1	succ2	succ3	days	E_START	
1	Approve Plan	Drawings	Anal. Market	Write Specs	5	01DEC03	
2	Drawings	Prototype			10	06DEC03	
3	Anal. Market	Mkt. Strat.			5	06DEC03	
4	Write Specs	Prototype			5	06DEC03	
5	Prototype	Materials	Facility		15	16DEC03	
6	Mkt. Strat.	Test Market	Marketing		10	11DEC03	
7	Materials	Init. Prod.			10	04JAN04	
8	Facility	Init. Prod.			10	04JAN04	
9	Init. Prod.	Test Market	Marketing	Evaluate	10	14JAN04	
10	Evaluate	Changes			10	24JAN04	
11	Test Market	Changes			15	24JAN04	
12	Changes	Production			5	08FEB04	
13	Production				0	13FEB04	
14	Marketing				0	24JAN04	
Obs	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT	B_START	B_FINISH
1	05DEC03	01DEC03	05DEC03	0	0	01DEC03	05DEC03
2	15DEC03	06DEC03	15DEC03	0	0	06DEC03	15DEC03
3	10DEC03	09JAN04	13JAN04	30	0	06DEC03	10DEC03
4	10DEC03	11DEC03	15DEC03	5	5	06DEC03	10DEC03
5	03JAN04	16DEC03	03JAN04	0	0	16DEC03	03JAN04
6	20DEC03	14JAN04	23JAN04	30	30	11DEC03	20DEC03
7	13JAN04	04JAN04	13JAN04	0	0	04JAN04	13JAN04
8	13JAN04	04JAN04	13JAN04	0	0	04JAN04	13JAN04
9	23JAN04	14JAN04	23JAN04	0	0	14JAN04	23JAN04
10	02FEB04	29JAN04	07FEB04	5	5	24JAN04	02FEB04
11	07FEB04	24JAN04	07FEB04	0	0	24JAN04	07FEB04
12	12FEB04	08FEB04	12FEB04	0	0	08FEB04	12FEB04
13	13FEB04	13FEB04	13FEB04	0	0	13FEB04	13FEB04
14	24JAN04	13FEB04	13FEB04	20	20	24JAN04	24JAN04

As the project progresses, you have to account for the actual progress of the project and schedule the unfinished activities accordingly. You can do so by specifying actual start or actual finish times (or both) for activities that have already finished or are in progress. Progress information can also be specified using percent complete or

remaining duration values. Assume that current information has been incorporated into the ACTUAL data set, shown in [Output 2.13.2](#). The variables `sdate` and `fdate` contain the actual start and finish times of the activities, and `rdur` specifies the number of days of work that are still remaining for the activity to be completed, and `pctc` specifies the percent of work that has been completed for that activity.

Output 2.13.2. Progress Data Set ACTUAL

Progress Update and Target Schedules					
Progress Data					
Obs	task	sdate	fdate	pctc	rdur
1	Approve Plan	01DEC2003	05DEC2003	.	.
2	Drawings	06DEC2003	16DEC2003	.	.
3	Anal. Market	05DEC2003	.	100	.
4	Write Specs	07DEC2003	12DEC2003	.	.
5	Prototype	.	.	.	.
6	Mkt. Strat.	10DEC2003	.	.	3
7	Materials	.	.	.	.
8	Facility	.	.	.	.
9	Init. Prod.	.	.	.	.
10	Evaluate	.	.	.	.
11	Test Market	.	.	.	.
12	Changes	.	.	.	.
13	Production	.	.	.	.
14	Marketing	.	.	.	.

The following statements invoke PROC CPM after merging the progress data with the Schedule data set. The NOAUTOUPDT option is specified so that only those activities that have explicit progress information are assumed to have started. The resulting Schedule data set contains the new variables `A_START`, `A_FINISH`, `A_DUR`, and `STATUS`; this data set is displayed in [Output 2.13.3](#). Note that the activity ‘Mkt. Strat.’, which has `rdur=‘3’` in [Output 2.13.2](#), has an early finish time (December 21, 2003) that is three days after `TIMENOW`. The `S_VAR` and `F_VAR` variables show the amount of slippage in the start and finish times (predicted on the basis of the current schedule) as compared to the baseline schedule.

```

* merge the baseline information with progress update;
data widgact;
  merge actual widgbase;
run;

proc cpm data=widgact holidata=holidays
  out=widgnupd date='1dec03'd;
  activity task;
  succ succ1 succ2 succ3;
  duration days;
  holiday holiday / holifin=(holifin);
  baseline / compare=early;
  actual / a_start=sdate a_finish=fdate timenow='19dec03'd
  remdur=rdur pctcomp=pctc noautoupdt;
run;

```

Output 2.13.3. Comparison of Schedules: NOAUTOUPDT

Progress Update and Target Schedules							
Updated Schedule vs. Target Schedule: NOAUTOUPDT							
Obs	task	succ1	succ2	succ3	days	STATUS	
1	Approve Plan	Drawings	Anal. Market	Write Specs	5	Completed	
2	Drawings	Prototype			10	Completed	
3	Anal. Market	Mkt. Strat.			5	Completed	
4	Write Specs	Prototype			5	Completed	
5	Prototype	Materials	Facility		15	Pending	
6	Mkt. Strat.	Test Market	Marketing		10	In Progress	
7	Materials	Init. Prod.			10	Pending	
8	Facility	Init. Prod.			10	Pending	
9	Init. Prod.	Test Market	Marketing	Evaluate	10	Pending	
10	Evaluate	Changes			10	Pending	
11	Test Market	Changes			15	Pending	
12	Changes	Production			5	Pending	
13	Production				0	Pending	
14	Marketing				0	Pending	
Obs	A_DUR	A_START	A_FINISH	E_START	E_FINISH	L_START	L_FINISH
1	5	01DEC03	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03
2	11	06DEC03	16DEC03	06DEC03	16DEC03	06DEC03	16DEC03
3	5	05DEC03	09DEC03	05DEC03	09DEC03	05DEC03	09DEC03
4	6	07DEC03	12DEC03	07DEC03	12DEC03	07DEC03	12DEC03
5	.	.	.	19DEC03	06JAN04	19DEC03	06JAN04
6	.	10DEC03	.	10DEC03	21DEC03	10DEC03	21DEC03
7	.	.	.	07JAN04	16JAN04	07JAN04	16JAN04
8	.	.	.	07JAN04	16JAN04	07JAN04	16JAN04
9	.	.	.	17JAN04	26JAN04	17JAN04	26JAN04
10	.	.	.	27JAN04	05FEB04	01FEB04	10FEB04
11	.	.	.	27JAN04	10FEB04	27JAN04	10FEB04
12	.	.	.	11FEB04	15FEB04	11FEB04	15FEB04
13	.	.	.	16FEB04	16FEB04	16FEB04	16FEB04
14	.	.	.	27JAN04	27JAN04	16FEB04	16FEB04
Obs	T_FLOAT	F_FLOAT	B_START	B_FINISH	S_VAR	F_VAR	
1	0	0	01DEC03	05DEC03	0	0	
2	0	0	06DEC03	15DEC03	0	1	
3	0	0	06DEC03	10DEC03	-1	-1	
4	0	0	06DEC03	10DEC03	1	2	
5	0	0	16DEC03	03JAN04	3	3	
6	0	0	11DEC03	20DEC03	-1	1	
7	0	0	04JAN04	13JAN04	3	3	
8	0	0	04JAN04	13JAN04	3	3	
9	0	0	14JAN04	23JAN04	3	3	
10	5	5	24JAN04	02FEB04	3	3	
11	0	0	24JAN04	07FEB04	3	3	
12	0	0	08FEB04	12FEB04	3	3	
13	0	0	13FEB04	13FEB04	3	3	
14	20	20	24JAN04	24JAN04	3	3	

In order for you to see the effect of the AUTOUPDT option, the same project information is used with the AUTOUPDT option in the ACTUAL statement. [Output 2.13.4](#) displays the resulting schedule. With the AUTOUPDT option (which is, in fact, the default option), PROC CPM uses the progress information and the precedence information to automatically fill in the actual start and finish information for activities that should have finished or started before TIMENOW. Note that the activity 'Prototype' has no progress information in WIDGACT, but it is assumed to have an actual start

date of December 17, 2003. This option is useful when there are several activities that take place according to the plan and only a few occur out of sequence; then it is sufficient to enter progress information only for the activities that did not follow the plan. The SHOWFLOAT option, also used in this invocation of PROC CPM, enables activities that are completed or in progress to have float; in other words, the late start schedule for activities in progress is not fixed by the progress information. Thus, the activity 'Anal. Market' has `L_START='08JAN04'` instead of '05DEC03', as in the earlier invocation of PROC CPM (without the SHOWFLOAT option).

The following invocation of PROC CPM produces [Output 2.13.4](#):

```
proc cpm data=widgact holidata=holidays
      out=widgupdt date='1dec03'd;
  activity task;
  succ      succ1 succ2 succ3;
  duration days;
  holiday holiday / holifin=(holifin);
  baseline / compare=early;
  actual / as=sdate af=fdate timenow='19dec03'd
          remdur=rdur pctcomp=pctc
          autoupdt showfloat;
run;
```

Output 2.13.4. Comparison of Schedules: AUTOUPDT

Progress Update and Target Schedules						
Updated Schedule vs. Target Schedule: AUTOUPDT						
Obs	task	succ1	succ2	succ3	days	STATUS
1	Approve Plan	Drawings	Anal. Market	Write Specs	5	Completed
2	Drawings	Prototype			10	Completed
3	Anal. Market	Mkt. Strat.			5	Completed
4	Write Specs	Prototype			5	Completed
5	Prototype	Materials	Facility		15	In Progress
6	Mkt. Strat.	Test Market	Marketing		10	In Progress
7	Materials	Init. Prod.			10	Pending
8	Facility	Init. Prod.			10	Pending
9	Init. Prod.	Test Market	Marketing	Evaluate	10	Pending
10	Evaluate	Changes			10	Pending
11	Test Market	Changes			15	Pending
12	Changes	Production			5	Pending
13	Production				0	Pending
14	Marketing				0	Pending

Obs	A_DUR	A_START	A_FINISH	E_START	E_FINISH	L_START	L_FINISH
1	5	01DEC03	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03
2	11	06DEC03	16DEC03	06DEC03	16DEC03	06DEC03	16DEC03
3	5	05DEC03	09DEC03	05DEC03	09DEC03	08JAN04	12JAN04
4	6	07DEC03	12DEC03	07DEC03	12DEC03	11DEC03	16DEC03
5	.	17DEC03	.	17DEC03	04JAN04	17DEC03	04JAN04
6	.	10DEC03	.	10DEC03	21DEC03	13JAN04	24JAN04
7	.	.	.	05JAN04	14JAN04	05JAN04	14JAN04
8	.	.	.	05JAN04	14JAN04	05JAN04	14JAN04
9	.	.	.	15JAN04	24JAN04	15JAN04	24JAN04
10	.	.	.	25JAN04	03FEB04	30JAN04	08FEB04
11	.	.	.	25JAN04	08FEB04	25JAN04	08FEB04
12	.	.	.	09FEB04	13FEB04	09FEB04	13FEB04
13	.	.	.	14FEB04	14FEB04	14FEB04	14FEB04
14	.	.	.	25JAN04	25JAN04	14FEB04	14FEB04

Obs	T_FLOAT	F_FLOAT	B_START	B_FINISH	S_VAR	F_VAR
1	0	-1	01DEC03	05DEC03	0	0
2	0	0	06DEC03	15DEC03	0	1
3	30	0	06DEC03	10DEC03	-1	-1
4	4	4	06DEC03	10DEC03	1	2
5	0	0	16DEC03	03JAN04	1	1
6	30	30	11DEC03	20DEC03	-1	1
7	0	0	04JAN04	13JAN04	1	1
8	0	0	04JAN04	13JAN04	1	1
9	0	0	14JAN04	23JAN04	1	1
10	5	5	24JAN04	02FEB04	1	1
11	0	0	24JAN04	07FEB04	1	1
12	0	0	08FEB04	12FEB04	1	1
13	0	0	13FEB04	13FEB04	1	1
14	20	20	24JAN04	24JAN04	1	1

Example 2.14. Summarizing Resource Utilization

This example shows how you can use the RESOURCE statement in conjunction with the RESOURCEOUT= option to summarize resource utilization. The example assumes that Engineer is a resource category and the project network (in AOA format) along with resource requirements for each activity is in a SAS data set, as displayed in [Output 2.14.1.](#)

Output 2.14.1. Resource Utilization: WIDGRES

Summarizing Resource Utilization					
Activity Data Set					
Obs	task	days	tail	head	engineer
1	Approve Plan	5	1	2	2
2	Drawings	10	2	3	1
3	Anal. Market	5	2	4	1
4	Write Specs	5	2	3	2
5	Prototype	15	3	5	4
6	Mkt. Strat.	10	4	6	.
7	Materials	10	5	7	.
8	Facility	10	5	7	2
9	Init. Prod.	10	7	8	4
10	Evaluate	10	8	9	1
11	Test Market	15	6	9	.
12	Changes	5	9	10	2
13	Production	0	10	11	4
14	Marketing	0	6	12	.
15	Dummy	0	8	6	.

Output 2.14.2. Resource Utilization: HOLDATA

Summarizing Resource Utilization		
Holidays Data Set HOLDATA		
Obs	hol	name
1	25DEC03	Christmas
2	01JAN04	New Year

In the following program, PROC CPM is invoked with the RESOURCE statement identifying the resource for which usage information is required. The project is scheduled only on weekdays, and holiday information is included through the Holiday data set, HOLDATA, which identifies two holidays, one for Christmas and one for New Year’s Day. [Output 2.14.2](#) shows the Holiday data set.

The program saves the resource usage information in a data set named ROUT, which is displayed in [Output 2.14.3](#). Two variables, Eengineer and Lengineer, denote the usage of the resource engineer corresponding to the early and late start schedules, respectively. Note the naming convention for the variables in the resource usage data set: A prefix (E for Early and L for Late) is followed by the name of the resource variable, engineer. Note also that the data set contains only observations corresponding to weekdays; by default, the _TIME_ variable in the resource usage output data set increases by one unit *interval* of the default calendar for every observation. Further, the MAXDATE= option is used in the RESOURCE statement to get resource usage information only for the month of December.

```
proc cpm date='1dec03'd interval=weekday
      resourceout=rout data=widgres
      holidata=holiday;
id task;
tailnode tail;
```

```

duration days;
headnode head;
resource engineer / maxdate='31dec03'd;
holiday hol;
run;

```

Output 2.14.3. Resource Utilization: Resource Usage Data Set

Summarizing Resource Utilization			
Resource Usage			
Obs	_TIME_	Eengineer	Lengineer
1	01DEC03	2	2
2	02DEC03	2	2
3	03DEC03	2	2
4	04DEC03	2	2
5	05DEC03	2	2
6	08DEC03	4	1
7	09DEC03	4	1
8	10DEC03	4	1
9	11DEC03	4	1
10	12DEC03	4	1
11	15DEC03	1	3
12	16DEC03	1	3
13	17DEC03	1	3
14	18DEC03	1	3
15	19DEC03	1	3
16	22DEC03	4	4
17	23DEC03	4	4
18	24DEC03	4	4
19	26DEC03	4	4
20	29DEC03	4	4
21	30DEC03	4	4
22	31DEC03	4	4

This data set can be used as input for any type of resource utilization report. In this example, the resource usage for the month of December is presented in two ways: on a calendar and in a chart. The following program prints the calendar and bar chart:

```

/* format the Engineer variables */
proc format;
  picture efmt other='9 ESS Eng.';
  picture lfmt other='9 LSS Eng.';

proc calendar legend weekdays
  data=rout holidata=holdata;
  id _time_;
  var eengineer lengineer;
  format eengineer efmt. lengineer lfmt.;
  holiday hol;
  holineame name;

proc chart data=rout;
  hbar _time_/sumvar=eengineer discrete;
  hbar _time_/sumvar=lengineer discrete;
run;

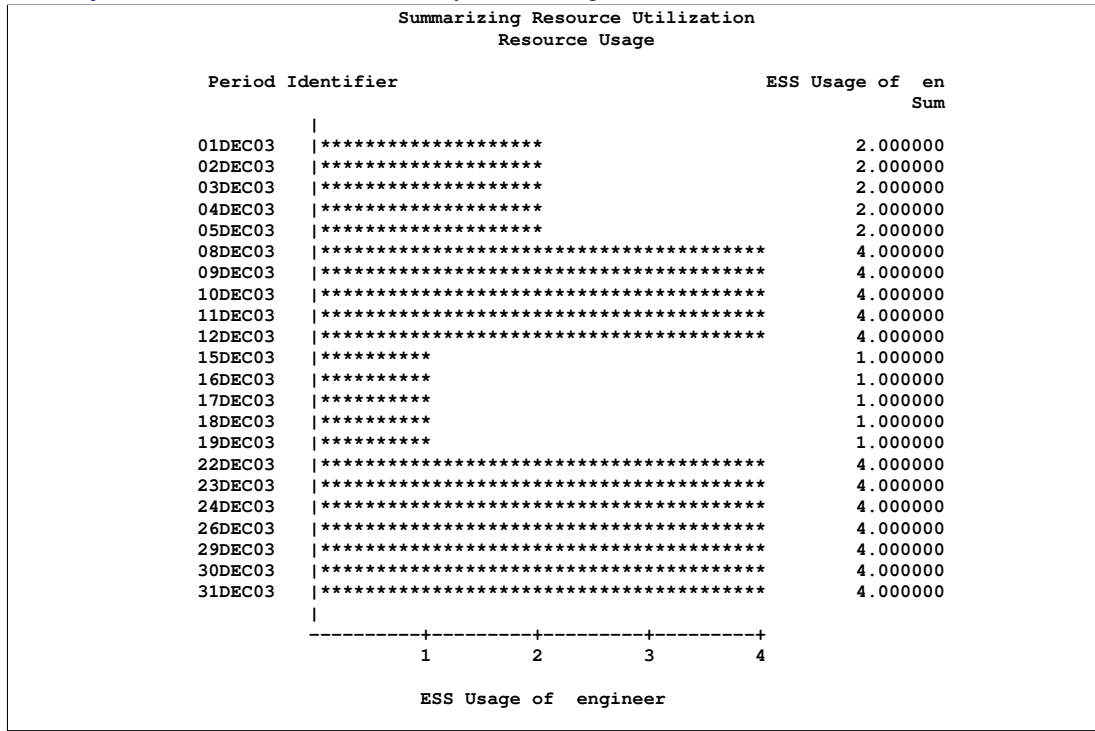
```

Output 2.14.4. Calendar Showing Resource Usage

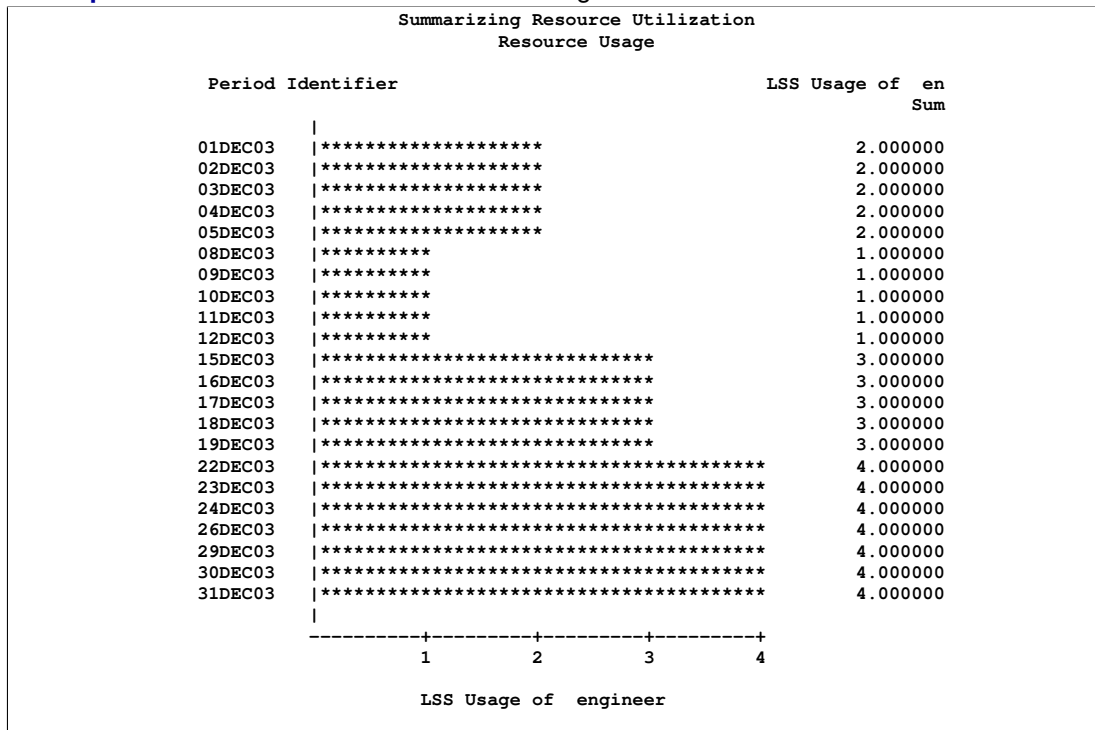
Summarizing Resource Utilization Resource Usage				
December 2003				
Monday	Tuesday	Wednesday	Thursday	Friday
1	2	3	4	5
2 ESS Eng	2 ESS Eng	2 ESS Eng	2 ESS Eng	2 ESS Eng
2 LSS Eng	2 LSS Eng	2 LSS Eng	2 LSS Eng	2 LSS Eng
8	9	10	11	12
4 ESS Eng	4 ESS Eng	4 ESS Eng	4 ESS Eng	4 ESS Eng
1 LSS Eng	1 LSS Eng	1 LSS Eng	1 LSS Eng	1 LSS Eng
15	16	17	18	19
1 ESS Eng	1 ESS Eng	1 ESS Eng	1 ESS Eng	1 ESS Eng
3 LSS Eng	3 LSS Eng	3 LSS Eng	3 LSS Eng	3 LSS Eng
22	23	24	25 Christmas	26
4 ESS Eng	4 ESS Eng	4 ESS Eng		4 ESS Eng
4 LSS Eng	4 LSS Eng	4 LSS Eng		4 LSS Eng
29	30	31		
4 ESS Eng	4 ESS Eng	4 ESS Eng		
4 LSS Eng	4 LSS Eng	4 LSS Eng		

Legend	
ESS Usage of	engineer
LSS Usage of	engineer

Output 2.14.5. Bar Chart for Early Start Usage



Output 2.14.6. Bar Chart for Late Start Usage



Charts such as those shown in [Output 2.14.4](#) through [Output 2.14.6](#) can be used to compare different schedules with respect to resource usage.

Example 2.15. Resource Allocation

In the previous example, a summary of the resource utilization is obtained. Suppose that you want to schedule the project subject to constraints on the availability of ENGINEERS. The activity data, as in [Example 2.14](#), are assumed to be in a data set named WIDGRES. The resource variable, `engineer`, specifies the number of engineers needed per day for each activity in the project. In addition to the resource `engineer`, a consumable resource `engcost` is computed at a daily rate of 200 for each unit of resource `engineer` used per day. The following DATA step uses the Activity data set from [Example 2.14](#) to create a new Activity data set that includes the resource `engcost`.

```
data widgres;
  set widgres;
  if engineer ^= . then engcost = engineer * 200;
run;
```

Now suppose that the availability of the resource `engineer` and the total outlay for `engcost` is saved in a data set named WIDGRIN, displayed in [Output 2.15.1](#).

Output 2.15.1. Resource Availability Data Set

Resource Allocation Data Set WIDGRIN				
Obs	per	otype	engineer	engcost
1	.	restype	1	2
2	.	suplevel	1	.
3	01DEC03	reslevel	3	40000
4	26DEC03	reslevel	4	.

In the data set WIDGRIN, the first observation indicates that `engineer` is a replenishable resource, while `engcost` is a consumable resource. The second observation indicates that an extra engineer is available, if necessary. The remaining observations indicate the availability profile starting from December 1, 2003. PROC CPM is then used to schedule the project to start on December 1, 2003, subject to the availability as specified.

```
proc cpm date='01dec03'd interval=weekday
  data=widgres holdata=holdata resin=widgrin
  out=widgschd resout=widgrout;
  tailnode tail;
  duration days;
  headnode head;
  holiday hol;
  resource engineer engcost / period=per obstype=otype
  schedrule=shortdur
  delayanalysis;

  id task;
run;
```

Output 2.15.2. Resource Constrained Schedule: Rule = SHORTDUR

Resource Allocation									
Resource Constrained Schedule: Rule = SHORTDUR									
Obs	tail	head	days	task	engineer	engcost	S_START	S_FINISH	
1	1	2	5	Approve Plan	2	400	01DEC03	05DEC03	
2	2	3	10	Drawings	1	200	15DEC03	29DEC03	
3	2	4	5	Anal. Market	1	200	08DEC03	12DEC03	
4	2	3	5	Write Specs	2	400	08DEC03	12DEC03	
5	3	5	15	Prototype	4	800	30DEC03	20JAN04	
6	4	6	10	Mkt. Strat.	.	.	15DEC03	29DEC03	
7	5	7	10	Materials	.	.	21JAN04	03FEB04	
8	5	7	10	Facility	2	400	21JAN04	03FEB04	
9	7	8	10	Init. Prod.	4	800	04FEB04	17FEB04	
10	8	9	10	Evaluate	1	200	18FEB04	02MAR04	
11	6	9	15	Test Market	.	.	18FEB04	09MAR04	
12	9	10	5	Changes	2	400	10MAR04	16MAR04	
13	10	11	0	Production	4	800	17MAR04	17MAR04	
14	6	12	0	Marketing	.	.	18FEB04	18FEB04	
15	8	6	0	Dummy	.	.	18FEB04	18FEB04	

Obs	E_START	E_FINISH	L_START	L_FINISH	R_DELAY	DELAY_R	SUPPL_R
1	01DEC03	05DEC03	01DEC03	05DEC03	0		
2	08DEC03	19DEC03	08DEC03	19DEC03	5	engineer	
3	08DEC03	12DEC03	21JAN04	27JAN04	0		
4	08DEC03	12DEC03	15DEC03	19DEC03	0		
5	22DEC03	13JAN04	22DEC03	13JAN04	0		
6	15DEC03	29DEC03	28JAN04	10FEB04	0		
7	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	11FEB04	02MAR04	11FEB04	02MAR04	0		
12	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	10MAR04	10MAR04	0		
15	11FEB04	11FEB04	11FEB04	11FEB04	0		

In the first invocation of PROC CPM, the scheduling rule used for ordering the activities to be scheduled at a given time is specified to be SHORTDUR. The data set WIDGSCHD, displayed in [Output 2.15.2](#), contains the resource constrained start and finish times in the variables S_START and S_FINISH. On December 8, three activities can be scheduled, all of which require the resource engineer. Using the scheduling rule specified, PROC CPM schedules the activities with the shortest durations first; thus, the activity ‘Drawings’ is delayed by five working days, until December 15, 2003.

The DELAYANALYSIS option in the RESOURCE statement helps analyze the cause of the delay by adding three new variables to the Schedule data set, R_DELAY, DELAY_R, and SUPPL_R. In this example, the R_DELAY and DELAY_R variables indicate that there is a delay of five days in the activity ‘Drawings’ due to the resource engineer. Such information helps to pinpoint the source of resource insufficiency, if any.

Note that other activities that follow ‘Drawings’ also have S_START > E_START, but the slippage in these activities is not caused by resource insufficiency, it is due to

their predecessors being delayed. Note that the entire project is delayed by five working days due to resource constraints (the maximum value of S_FINISH is 17MAR04, while the maximum value of E_FINISH is 10MAR04).

Note also that in this invocation, the DELAY= option is not specified; therefore, the supplementary level of resource is not used, since the primary levels of resources are found to be sufficient to schedule the project by delaying some of the activities.

The data set WIDGROUT, displayed in [Output 2.15.3](#), contains variables Rengineer and Aengineer in addition to the variables Eengineer and Lengineer. The variable Rengineer denotes the usage of the resource engineer corresponding to the resource-constrained schedule, and Aengineer denotes the remaining level of the resource after resource allocation. For the consumable resource engcost, the variables Eengcost, Lengcost, and Rengcost indicate the rate of usage per unit *rouinterval* (which defaults to INTERVAL=WEEKDAY, in this case) at the start of the time interval specified in the variable _TIME_. The variable Aengcost denotes the amount of money available at the beginning of the time specified in the _TIME_ variable.

Output 2.15.3. Resource Usage: Rule = SHORTDUR

Resource Allocation									
Usage Profiles for Constrained Schedule: Rule = SHORTDUR									
		E	L	R	A	E	L	R	A
		e	e	e	e	e	e	e	e
		n	n	n	n	n	n	n	n
		g	g	g	g	g	g	g	g
		i	i	i	i	i	i	i	i
		n	n	n	n	n	n	n	n
		e	e	e	e	e	e	e	e
		e	e	e	e	e	e	e	e
		r	r	r	r	r	r	r	r
1	01DEC03	2	2	2	1	400	400	400	40000
2	02DEC03	2	2	2	1	400	400	400	39600
3	03DEC03	2	2	2	1	400	400	400	39200
4	04DEC03	2	2	2	1	400	400	400	38800
5	05DEC03	2	2	2	1	400	400	400	38400
6	08DEC03	4	1	3	0	800	200	600	38000
7	09DEC03	4	1	3	0	800	200	600	37400
8	10DEC03	4	1	3	0	800	200	600	36800
9	11DEC03	4	1	3	0	800	200	600	36200
10	12DEC03	4	1	3	0	800	200	600	35600
11	15DEC03	1	3	1	2	200	600	200	35000
12	16DEC03	1	3	1	2	200	600	200	34800
13	17DEC03	1	3	1	2	200	600	200	34600
14	18DEC03	1	3	1	2	200	600	200	34400
15	19DEC03	1	3	1	2	200	600	200	34200
16	22DEC03	4	4	1	2	800	800	200	34000
17	23DEC03	4	4	1	2	800	800	200	33800
18	24DEC03	4	4	1	2	800	800	200	33600
19	26DEC03	4	4	1	3	800	800	200	33400
20	29DEC03	4	4	1	3	800	800	200	33200
21	30DEC03	4	4	4	0	800	800	800	33000
22	31DEC03	4	4	4	0	800	800	800	32200
23	02JAN04	4	4	4	0	800	800	800	31400
24	05JAN04	4	4	4	0	800	800	800	30600
25	06JAN04	4	4	4	0	800	800	800	29800
26	07JAN04	4	4	4	0	800	800	800	29000
27	08JAN04	4	4	4	0	800	800	800	28200
28	09JAN04	4	4	4	0	800	800	800	27400
29	12JAN04	4	4	4	0	800	800	800	26600
30	13JAN04	4	4	4	0	800	800	800	25800
31	14JAN04	2	2	4	0	400	400	800	25000
32	15JAN04	2	2	4	0	400	400	800	24200
33	16JAN04	2	2	4	0	400	400	800	23400
34	19JAN04	2	2	4	0	400	400	800	22600
35	20JAN04	2	2	4	0	400	400	800	21800
36	21JAN04	2	3	2	2	400	600	400	21000
37	22JAN04	2	3	2	2	400	600	400	20600
38	23JAN04	2	3	2	2	400	600	400	20200
39	26JAN04	2	3	2	2	400	600	400	19800
40	27JAN04	2	3	2	2	400	600	400	19400
41	28JAN04	4	4	2	2	800	800	400	19000
42	29JAN04	4	4	2	2	800	800	400	18600
43	30JAN04	4	4	2	2	800	800	400	18200
44	02FEB04	4	4	2	2	800	800	400	17800
45	03FEB04	4	4	2	2	800	800	400	17400
46	04FEB04	4	4	4	0	800	800	800	17000
47	05FEB04	4	4	4	0	800	800	800	16200

Resource Allocation									
Usage Profiles for Constrained Schedule: Rule = SHORTDUR									
		E	L	R	A	E	L	R	A
		e	e	e	e	e	e	e	e
		n	n	n	n	n	n	n	n
		g	g	g	g	g	g	g	g
		i	i	i	i	i	i	i	i
		n	n	n	n	n	n	n	n
O	M	e	e	e	e	e	e	e	e
b	E	e	e	e	e	e	e	e	e
s		r	r	r	r	r	r	r	r
48	06FEB04	4	4	4	0	800	800	800	15400
49	09FEB04	4	4	4	0	800	800	800	14600
50	10FEB04	4	4	4	0	800	800	800	13800
51	11FEB04	1	0	4	0	200	0	800	13000
52	12FEB04	1	0	4	0	200	0	800	12200
53	13FEB04	1	0	4	0	200	0	800	11400
54	16FEB04	1	0	4	0	200	0	800	10600
55	17FEB04	1	0	4	0	200	0	800	9800
56	18FEB04	1	1	1	3	200	200	200	9000
57	19FEB04	1	1	1	3	200	200	200	8800
58	20FEB04	1	1	1	3	200	200	200	8600
59	23FEB04	1	1	1	3	200	200	200	8400
60	24FEB04	1	1	1	3	200	200	200	8200
61	25FEB04	0	1	1	3	0	200	200	8000
62	26FEB04	0	1	1	3	0	200	200	7800
63	27FEB04	0	1	1	3	0	200	200	7600
64	01MAR04	0	1	1	3	0	200	200	7400
65	02MAR04	0	1	1	3	0	200	200	7200
66	03MAR04	2	2	0	4	400	400	0	7000
67	04MAR04	2	2	0	4	400	400	0	7000
68	05MAR04	2	2	0	4	400	400	0	7000
69	08MAR04	2	2	0	4	400	400	0	7000
70	09MAR04	2	2	0	4	400	400	0	7000
71	10MAR04	0	0	2	2	0	0	400	7000
72	11MAR04	0	0	2	2	0	0	400	6600
73	12MAR04	0	0	2	2	0	0	400	6200
74	15MAR04	0	0	2	2	0	0	400	5800
75	16MAR04	0	0	2	2	0	0	400	5400
76	17MAR04	0	0	0	4	0	0	0	5000

The second invocation of PROC CPM uses a different scheduling rule (LST, which is the default scheduling rule). Ties are broken using the L_START times for the activities. In this example, this rule results in a shorter project schedule. The schedule and the resource usage data sets are displayed in [Output 2.15.4](#) and [Output 2.15.5](#), respectively. Once again the variables DELAY_R and R_DELAY indicate that the resource engineer caused the activity 'Anal. Market' ('Prototype') to be delayed by five days (three days). However, the entire project is delayed only by three working days because the activity 'Anal. Market' is not a critical activity, and delaying it by five days did not affect the project completion time. Note that even with the resource delay of 5 days, this activity is scheduled earlier (S_START=15DEC03) than its latest start time (L_START=21JAN04).

```
proc cpm date='01dec03'd
interval=weekday
data=widgres
```

```

resin=widgrin
holidata=holdata
out=widgsch2
resout=widgrou2;
tailnode tail;
duration days;
headnode head;
holiday hol;
resource engineer engcost / period=per
                        obstype=otype
                        schedrule=lst
                        delayanalysis;

id task;
run;

```

Output 2.15.4. Resource Constrained Schedule: Rule = LST

Resource Allocation								
Resource Constrained Schedule: Rule = LST								
Obs	tail	head	days	task	engineer	engcost	S_START	S_FINISH
1	1	2	5	Approve Plan	2	400	01DEC03	05DEC03
2	2	3	10	Drawings	1	200	08DEC03	19DEC03
3	2	4	5	Anal. Market	1	200	15DEC03	19DEC03
4	2	3	5	Write Specs	2	400	08DEC03	12DEC03
5	3	5	15	Prototype	4	800	26DEC03	16JAN04
6	4	6	10	Mkt. Strat.	.	.	22DEC03	06JAN04
7	5	7	10	Materials	.	.	19JAN04	30JAN04
8	5	7	10	Facility	2	400	19JAN04	30JAN04
9	7	8	10	Init. Prod.	4	800	02FEB04	13FEB04
10	8	9	10	Evaluate	1	200	16FEB04	27FEB04
11	6	9	15	Test Market	.	.	16FEB04	05MAR04
12	9	10	5	Changes	2	400	08MAR04	12MAR04
13	10	11	0	Production	4	800	15MAR04	15MAR04
14	6	12	0	Marketing	.	.	16FEB04	16FEB04
15	8	6	0	Dummy	.	.	16FEB04	16FEB04

Obs	E_START	E_FINISH	L_START	L_FINISH	R_DELAY	DELAY_R	SUPPL_R
1	01DEC03	05DEC03	01DEC03	05DEC03	0		
2	08DEC03	19DEC03	08DEC03	19DEC03	0		
3	08DEC03	12DEC03	21JAN04	27JAN04	5	engineer	
4	08DEC03	12DEC03	15DEC03	19DEC03	0		
5	22DEC03	13JAN04	22DEC03	13JAN04	3	engineer	
6	15DEC03	29DEC03	28JAN04	10FEB04	0		
7	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	11FEB04	02MAR04	11FEB04	02MAR04	0		
12	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	10MAR04	10MAR04	0		
15	11FEB04	11FEB04	11FEB04	11FEB04	0		

Output 2.15.5. Resource Usage: Rule = LST

Resource Allocation									
Usage Profiles for Constrained Schedule: Rule = LST									
		E	L	R	A	E	L	R	A
		e	e	e	e	e	e	e	e
		n	n	n	n	n	n	n	n
		g	g	g	g	g	g	g	g
	T	i	i	i	i	i	i	i	i
	I	n	n	n	n	n	n	n	n
O	M	e	e	e	e	e	e	e	e
b	E	e	e	e	e	e	e	e	e
s		r	r	r	r	t	t	t	t
1	01DEC03	2	2	2	1	400	400	400	40000
2	02DEC03	2	2	2	1	400	400	400	39600
3	03DEC03	2	2	2	1	400	400	400	39200
4	04DEC03	2	2	2	1	400	400	400	38800
5	05DEC03	2	2	2	1	400	400	400	38400
6	08DEC03	4	1	3	0	800	200	600	38000
7	09DEC03	4	1	3	0	800	200	600	37400
8	10DEC03	4	1	3	0	800	200	600	36800
9	11DEC03	4	1	3	0	800	200	600	36200
10	12DEC03	4	1	3	0	800	200	600	35600
11	15DEC03	1	3	2	1	200	600	400	35000
12	16DEC03	1	3	2	1	200	600	400	34600
13	17DEC03	1	3	2	1	200	600	400	34200
14	18DEC03	1	3	2	1	200	600	400	33800
15	19DEC03	1	3	2	1	200	600	400	33400
16	22DEC03	4	4	0	3	800	800	0	33000
17	23DEC03	4	4	0	3	800	800	0	33000
18	24DEC03	4	4	0	3	800	800	0	33000
19	26DEC03	4	4	4	0	800	800	800	33000
20	29DEC03	4	4	4	0	800	800	800	32200
21	30DEC03	4	4	4	0	800	800	800	31400
22	31DEC03	4	4	4	0	800	800	800	30600
23	02JAN04	4	4	4	0	800	800	800	29800
24	05JAN04	4	4	4	0	800	800	800	29000
25	06JAN04	4	4	4	0	800	800	800	28200
26	07JAN04	4	4	4	0	800	800	800	27400
27	08JAN04	4	4	4	0	800	800	800	26600
28	09JAN04	4	4	4	0	800	800	800	25800
29	12JAN04	4	4	4	0	800	800	800	25000
30	13JAN04	4	4	4	0	800	800	800	24200
31	14JAN04	2	2	4	0	400	400	800	23400
32	15JAN04	2	2	4	0	400	400	800	22600
33	16JAN04	2	2	4	0	400	400	800	21800
34	19JAN04	2	2	2	2	400	400	400	21000
35	20JAN04	2	2	2	2	400	400	400	20600
36	21JAN04	2	3	2	2	400	600	400	20200
37	22JAN04	2	3	2	2	400	600	400	19800
38	23JAN04	2	3	2	2	400	600	400	19400
39	26JAN04	2	3	2	2	400	600	400	19000
40	27JAN04	2	3	2	2	400	600	400	18600
41	28JAN04	4	4	2	2	800	800	400	18200
42	29JAN04	4	4	2	2	800	800	400	17800
43	30JAN04	4	4	2	2	800	800	400	17400
44	02FEB04	4	4	4	0	800	800	800	17000
45	03FEB04	4	4	4	0	800	800	800	16200
46	04FEB04	4	4	4	0	800	800	800	15400
47	05FEB04	4	4	4	0	800	800	800	14600

Resource Allocation									
Usage Profiles for Constrained Schedule: Rule = LST									
		E	L	R	A	E	L	R	A
		e	e	e	e	e	e	e	e
		n	n	n	n	n	n	n	n
		g	g	g	g	g	g	g	g
	T	i	i	i	i	i	i	i	i
	I	n	n	n	n	n	n	n	n
O	M	e	e	e	e	e	e	e	e
b	E	e	e	e	e	e	e	e	e
s	-	r	r	r	r	r	r	r	r
48	06FEB04	4	4	4	0	800	800	800	13800
49	09FEB04	4	4	4	0	800	800	800	13000
50	10FEB04	4	4	4	0	800	800	800	12200
51	11FEB04	1	0	4	0	200	0	800	11400
52	12FEB04	1	0	4	0	200	0	800	10600
53	13FEB04	1	0	4	0	200	0	800	9800
54	16FEB04	1	0	1	3	200	0	200	9000
55	17FEB04	1	0	1	3	200	0	200	8800
56	18FEB04	1	1	1	3	200	200	200	8600
57	19FEB04	1	1	1	3	200	200	200	8400
58	20FEB04	1	1	1	3	200	200	200	8200
59	23FEB04	1	1	1	3	200	200	200	8000
60	24FEB04	1	1	1	3	200	200	200	7800
61	25FEB04	0	1	1	3	0	200	200	7600
62	26FEB04	0	1	1	3	0	200	200	7400
63	27FEB04	0	1	1	3	0	200	200	7200
64	01MAR04	0	1	0	4	0	200	0	7000
65	02MAR04	0	1	0	4	0	200	0	7000
66	03MAR04	2	2	0	4	400	400	0	7000
67	04MAR04	2	2	0	4	400	400	0	7000
68	05MAR04	2	2	0	4	400	400	0	7000
69	08MAR04	2	2	2	2	400	400	400	7000
70	09MAR04	2	2	2	2	400	400	400	6600
71	10MAR04	0	0	2	2	0	0	400	6200
72	11MAR04	0	0	2	2	0	0	400	5800
73	12MAR04	0	0	2	2	0	0	400	5400
74	15MAR04	0	0	0	4	0	0	0	5000

Example 2.16. Using Supplementary Resources

In this example, the same project as in [Example 2.15](#) is scheduled with a specification of DELAY=0. This indicates to PROC CPM that a supplementary level of resources is to be used if an activity cannot be scheduled to start on or before its latest start time (as computed in the unconstrained case). The schedule data and resource usage data are saved in the data sets WIDGO16 and WIDGRO16, respectively. They are displayed in [Output 2.16.1](#) and [Output 2.16.2](#), respectively.

```

title 'Using Supplementary Resources';
proc cpm date='01dec03'd interval=weekday
      data=widgres holdata=holdata resin=widgrin
      out=widgo16 resout=widgro16;
  tailnode tail;
  duration days;
  headnode head;
  holiday hol;

```

```

resource engineer engcost / period=per obstype=otype
                           cumusage
                           delay=0
                           delayanalysis
                           routnobreak;

id task;
run;

```

To analyze the results of the resource constrained scheduling, you must examine both output data sets, WIDGRO16 and WIDGO16. The negative values for Aengineer in observation numbers 22 through 25 of the Usage data set WIDGRO16 indicate the amount of supplementary resource that is needed on December 22, 23, 24, and 25, to complete the project without delaying any activity beyond its latest start time. Examination of the SUPPL_R variable in the Schedule data set WIDGO16 indicates that the activity, 'Prototype', is scheduled to start on December 22 by using a supplementary level of the resource engineer.

Note that the supplementary level is used only if the activity would otherwise get delayed beyond L_START + DELAY. Thus, the activity 'Anal. Market' is delayed by five days (S_START = '15DEC03') and scheduled later than its early start time (E_START = '08DEC03'), even though a supplementary level of the resource could have been used to start the activity earlier, because the activity's L_START time is equal to '21JAN04' and DELAY = 0.

Further, note the use of the option CUMUSAGE in the RESOURCE statement, requesting that *cumulative* resource usage be saved in the Usage data set for consumable resources. Thus, for the consumable resource engcost, the procedure saves the *cumulative* resource usage in the variables Eengcost, Lengcost, and Rengcost, respectively. For instance, Eengcost in a given observation specifies the cumulative value of engcost for the early start schedule through the end of the previous day.

Output 2.16.1. Resource-Constrained Schedule: Supplementary Resource

Using Supplementary Resources Resource Constrained Schedule								
Obs	tail	head	days	task	engineer	engcost	S_START	S_FINISH
1	1	2	5	Approve Plan	2	400	01DEC03	05DEC03
2	2	3	10	Drawings	1	200	08DEC03	19DEC03
3	2	4	5	Anal. Market	1	200	15DEC03	19DEC03
4	2	3	5	Write Specs	2	400	08DEC03	12DEC03
5	3	5	15	Prototype	4	800	22DEC03	13JAN04
6	4	6	10	Mkt. Strat.	.	.	22DEC03	06JAN04
7	5	7	10	Materials	.	.	14JAN04	27JAN04
8	5	7	10	Facility	2	400	14JAN04	27JAN04
9	7	8	10	Init. Prod.	4	800	28JAN04	10FEB04
10	8	9	10	Evaluate	1	200	11FEB04	24FEB04
11	6	9	15	Test Market	.	.	11FEB04	02MAR04
12	9	10	5	Changes	2	400	03MAR04	09MAR04
13	10	11	0	Production	4	800	10MAR04	10MAR04
14	6	12	0	Marketing	.	.	11FEB04	11FEB04
15	8	6	0	Dummy	.	.	11FEB04	11FEB04

Obs	E_START	E_FINISH	L_START	L_FINISH	R_DELAY	DELAY_R	SUPPL_R
1	01DEC03	05DEC03	01DEC03	05DEC03	0		
2	08DEC03	19DEC03	08DEC03	19DEC03	0		
3	08DEC03	12DEC03	21JAN04	27JAN04	5	engineer	
4	08DEC03	12DEC03	15DEC03	19DEC03	0		
5	22DEC03	13JAN04	22DEC03	13JAN04	0		engineer
6	15DEC03	29DEC03	28JAN04	10FEB04	0		
7	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	11FEB04	02MAR04	11FEB04	02MAR04	0		
12	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	10MAR04	10MAR04	0		
15	11FEB04	11FEB04	11FEB04	11FEB04	0		

This example also illustrates the use of the `ROUTNOBREAK` option to produce a resource usage output data set that does not have any breaks for holidays. Thus, the output data set `WIDGRO16` has observations corresponding to holidays and weekends, unlike the corresponding resource output data sets in [Example 2.15](#). Note that for consumable resources with cumulative usage there is no accumulation of the resource on holidays; thus, the cumulative value of `engcost` at the beginning of the 7th and 8th of December equals the value for the beginning of the 6th of December. For the resource `engineer`, however, the resource is assumed to be tied to the activity in progress even across holidays or weekends that are spanned by the activity's duration. For example, both activities 'Drawings' and 'Write Specs' start on December 8, 2003, requiring one and two engineers, respectively. The 'Write Specs' activity finishes on the 12th, freeing up two engineers, whereas 'Drawings' finishes only on the 19th of December. Thus, the data set `WIDGRO16` has `Rengineer` equal to '3' from 8DEC03 to 12DEC03 and then equal to '1' on the 13th and 14th of December. Another `engineer` is required by the activity 'Anal. Market' from December 15, 2003; thus, the total usage from 15DEC03 to 19DEC03 is '2'.

Output 2.16.2. Resource Usage: Supplementary Resources

Using Supplementary Resources Usage Profiles for Constrained Schedule										
		E	L	R	A	E	L	R	A	
		e	e	e	e	e	e	e	e	
		n	n	n	n	n	n	n	n	
		g	g	g	g	g	g	g	g	
		i	i	i	i	i	i	i	i	
		n	n	n	n	n	n	n	n	
		e	e	e	e	e	e	e	e	
		r	r	r	r	r	r	r	r	
O	1	01DEC03	2	2	2	1	0	0	0	40000
b	2	02DEC03	2	2	2	1	400	400	400	39600
s	3	03DEC03	2	2	2	1	800	800	800	39200
	4	04DEC03	2	2	2	1	1200	1200	1200	38800
	5	05DEC03	2	2	2	1	1600	1600	1600	38400
	6	06DEC03	0	0	0	3	2000	2000	2000	38000
	7	07DEC03	0	0	0	3	2000	2000	2000	38000
	8	08DEC03	4	1	3	0	2000	2000	2000	38000
	9	09DEC03	4	1	3	0	2800	2200	2600	37400
	10	10DEC03	4	1	3	0	3600	2400	3200	36800
	11	11DEC03	4	1	3	0	4400	2600	3800	36200
	12	12DEC03	4	1	3	0	5200	2800	4400	35600
	13	13DEC03	1	1	1	2	6000	3000	5000	35000
	14	14DEC03	1	1	1	2	6000	3000	5000	35000
	15	15DEC03	1	3	2	1	6000	3000	5000	35000
	16	16DEC03	1	3	2	1	6200	3600	5400	34600
	17	17DEC03	1	3	2	1	6400	4200	5800	34200
	18	18DEC03	1	3	2	1	6600	4800	6200	33800
	19	19DEC03	1	3	2	1	6800	5400	6600	33400
	20	20DEC03	0	0	0	3	7000	6000	7000	33000
	21	21DEC03	0	0	0	3	7000	6000	7000	33000
	22	22DEC03	4	4	4	-1	7000	6000	7000	33000
	23	23DEC03	4	4	4	-1	7800	6800	7800	32200
	24	24DEC03	4	4	4	-1	8600	7600	8600	31400
	25	25DEC03	4	4	4	-1	9400	8400	9400	30600
	26	26DEC03	4	4	4	0	9400	8400	9400	30600
	27	27DEC03	4	4	4	0	10200	9200	10200	29800
	28	28DEC03	4	4	4	0	10200	9200	10200	29800
	29	29DEC03	4	4	4	0	10200	9200	10200	29800
	30	30DEC03	4	4	4	0	11000	10000	11000	29000
	31	31DEC03	4	4	4	0	11800	10800	11800	28200
	32	01JAN04	4	4	4	0	12600	11600	12600	27400
	33	02JAN04	4	4	4	0	12600	11600	12600	27400
	34	03JAN04	4	4	4	0	13400	12400	13400	26600
	35	04JAN04	4	4	4	0	13400	12400	13400	26600
	36	05JAN04	4	4	4	0	13400	12400	13400	26600
	37	06JAN04	4	4	4	0	14200	13200	14200	25800
	38	07JAN04	4	4	4	0	15000	14000	15000	25000
	39	08JAN04	4	4	4	0	15800	14800	15800	24200
	40	09JAN04	4	4	4	0	16600	15600	16600	23400
	41	10JAN04	4	4	4	0	17400	16400	17400	22600
	42	11JAN04	4	4	4	0	17400	16400	17400	22600
	43	12JAN04	4	4	4	0	17400	16400	17400	22600
	44	13JAN04	4	4	4	0	18200	17200	18200	21800
	45	14JAN04	2	2	2	2	19000	18000	19000	21000
	46	15JAN04	2	2	2	2	19400	18400	19400	20600
	47	16JAN04	2	2	2	2	19800	18800	19800	20200

Using Supplementary Resources
Usage Profiles for Constrained Schedule

		E e n g i n e e r	L e n i n e e r	R e n i n e e r	A e n i n e e r	E e n g o s t	L e n g o s t	R e n g o s t	A e n g o s t
48	17JAN04	2	2	2	2	20200	19200	20200	19800
49	18JAN04	2	2	2	2	20200	19200	20200	19800
50	19JAN04	2	2	2	2	20200	19200	20200	19800
51	20JAN04	2	2	2	2	20600	19600	20600	19400
52	21JAN04	2	3	2	2	21000	20000	21000	19000
53	22JAN04	2	3	2	2	21400	20600	21400	18600
54	23JAN04	2	3	2	2	21800	21200	21800	18200
55	24JAN04	2	3	2	2	22200	21800	22200	17800
56	25JAN04	2	3	2	2	22200	21800	22200	17800
57	26JAN04	2	3	2	2	22200	21800	22200	17800
58	27JAN04	2	3	2	2	22600	22400	22600	17400
59	28JAN04	4	4	4	0	23000	23000	23000	17000
60	29JAN04	4	4	4	0	23800	23800	23800	16200
61	30JAN04	4	4	4	0	24600	24600	24600	15400
62	31JAN04	4	4	4	0	25400	25400	25400	14600
63	01FEB04	4	4	4	0	25400	25400	25400	14600
64	02FEB04	4	4	4	0	25400	25400	25400	14600
65	03FEB04	4	4	4	0	26200	26200	26200	13800
66	04FEB04	4	4	4	0	27000	27000	27000	13000
67	05FEB04	4	4	4	0	27800	27800	27800	12200
68	06FEB04	4	4	4	0	28600	28600	28600	11400
69	07FEB04	4	4	4	0	29400	29400	29400	10600
70	08FEB04	4	4	4	0	29400	29400	29400	10600
71	09FEB04	4	4	4	0	29400	29400	29400	10600
72	10FEB04	4	4	4	0	30200	30200	30200	9800
73	11FEB04	1	0	1	3	31000	31000	31000	9000
74	12FEB04	1	0	1	3	31200	31000	31200	8800
75	13FEB04	1	0	1	3	31400	31000	31400	8600
76	14FEB04	1	0	1	3	31600	31000	31600	8400
77	15FEB04	1	0	1	3	31600	31000	31600	8400
78	16FEB04	1	0	1	3	31600	31000	31600	8400
79	17FEB04	1	0	1	3	31800	31000	31800	8200
80	18FEB04	1	1	1	3	32000	31000	32000	8000
81	19FEB04	1	1	1	3	32200	31200	32200	7800
82	20FEB04	1	1	1	3	32400	31400	32400	7600
83	21FEB04	1	1	1	3	32600	31600	32600	7400
84	22FEB04	1	1	1	3	32600	31600	32600	7400
85	23FEB04	1	1	1	3	32600	31600	32600	7400
86	24FEB04	1	1	1	3	32800	31800	32800	7200
87	25FEB04	0	1	0	4	33000	32000	33000	7000
88	26FEB04	0	1	0	4	33000	32200	33000	7000
89	27FEB04	0	1	0	4	33000	32400	33000	7000
90	28FEB04	0	1	0	4	33000	32600	33000	7000
91	29FEB04	0	1	0	4	33000	32600	33000	7000
92	01MAR04	0	1	0	4	33000	32600	33000	7000
93	02MAR04	0	1	0	4	33000	32800	33000	7000
94	03MAR04	2	2	2	2	33000	33000	33000	7000

Using Supplementary Resources									
Usage Profiles for Constrained Schedule									
		E	L	R	A				
		e	e	e	e	E	L	R	A
		n	n	n	n	e	e	e	e
	—	g	g	g	g	n	n	n	n
	T	i	i	i	i	g	g	g	g
	I	n	n	n	n	c	c	c	c
O	M	e	e	e	e	o	o	o	o
b	E	e	e	e	e	s	s	s	s
s	—	r	r	r	r	t	t	t	t
95	04MAR04	2	2	2	2	33400	33400	33400	6600
96	05MAR04	2	2	2	2	33800	33800	33800	6200
97	06MAR04	2	2	2	2	34200	34200	34200	5800
98	07MAR04	2	2	2	2	34200	34200	34200	5800
99	08MAR04	2	2	2	2	34200	34200	34200	5800
100	09MAR04	2	2	2	2	34600	34600	34600	5400
101	10MAR04	0	0	0	4	35000	35000	35000	5000

Example 2.17. INFEASDIAGNOSTIC Option and Aggregate Resource Type

The INFEASDIAGNOSTIC option instructs PROC CPM to continue scheduling even when resources are insufficient. When PROC CPM schedules subject to resource constraints, it stops the scheduling process when it cannot find sufficient resources (primary or supplementary) for an activity before the activity’s latest possible start time ($L_START + DELAY$). In this case, you may want to determine which resources are needed to schedule all the activities and when the deficiencies occur. The INFEASDIAGNOSTIC option is equivalent to specifying infinite supplementary levels for all the resources under consideration; the DELAY= value is assumed to equal the default value of +INFINITY, unless it is specified otherwise.

The INFEASDIAGNOSTIC option is particularly useful when there are several resources involved and when project completion time is critical. You want things to be done on time, even if it means using supplementary resources or overtime resources; rather than trying to juggle activities around to try to fit available resource profiles, you want to determine the level of resources needed to accomplish tasks within a given time frame.

For the WIDGET manufacturing project, let us assume that there are four resources: a design engineer, a market analyst, a production engineer, and money. The resource requirements for the different activities are saved in a data set, WIDGR17, and displayed in [Output 2.17.1](#). Of these resources, suppose that the design engineer is the resource that is most crucial in terms of his availability; perhaps he is an outside contractor and you do not have control over his availability. You need to determine the project schedule subject to the constraints on the resource deseng. [Output 2.17.2](#) displays the RESOURCEIN= data set, RESIN17.

Output 2.17.1. Data Set WIDGR17

Use of the INFEASDIAGNOSTIC Option Data Set WIDGR17								
Obs	task	days	tail	head	deseng	mktan	prodeng	money
1	Approve Plan	5	1	2	1	1	1	200
2	Drawings	10	2	3	1	.	1	100
3	Anal. Market	5	2	4	.	1	1	100
4	Write Specs	5	2	3	1	.	1	150
5	Prototype	15	3	5	1	.	1	300
6	Mkt. Strat.	10	4	6	.	1	.	150
7	Materials	10	5	7	.	.	.	300
8	Facility	10	5	7	.	.	1	500
9	Init. Prod.	10	7	8	.	.	.	250
10	Evaluate	10	8	9	1	.	.	150
11	Test Market	15	6	9	.	1	.	200
12	Changes	5	9	10	1	.	1	200
13	Production	0	10	11	1	.	1	600
14	Marketing	0	6	12	.	1	.	.
15	Dummy	0	8	6	.	.	.	.

Output 2.17.2. Resourcein Data Set RESIN17

Use of the INFEASDIAGNOSTIC Option Data Set RESIN17						
Obs	per	otype	deseng	mktan	prodeng	money
1	.	restype	1	1	1	4
2	01DEC03	reslevel	1	.	1	.

In the first invocation of PROC CPM, the project is scheduled subject to resource constraints on the single resource variable `deseng`. [Output 2.17.3](#) displays the resulting Schedule data set WIDGO17S, which shows that the project is delayed by five days because of this resource. Note that the project finish time has been delayed only by five days, even though `R_DELAY='10'` for activity 'Write Specs'. This is due to the fact that there was a float of five days present in this activity.

```
proc cpm date='01dec03'd interval=weekday
  data=widgr17 holidaydata=holidaydata resin=resin17
  out=widgo17s;
  tailnode tail;
  duration days;
  headnode head;
  holiday hol;
  resource deseng / period=per obstype=otype
  delayanalysis;
  id task;
run;
```

Output 2.17.3. Resource-Constrained Schedule: Single Resource

Use of the INFEASDIAGNOSTIC Option								
Resource Constrained Schedule: Single Resource								
Obs	tail	head	days	task	deseng	S_START	S_FINISH	E_START
1	1	2	5	Approve Plan	1	01DEC03	05DEC03	01DEC03
2	2	3	10	Drawings	1	08DEC03	19DEC03	08DEC03
3	2	4	5	Anal. Market	.	08DEC03	12DEC03	08DEC03
4	2	3	5	Write Specs	1	22DEC03	29DEC03	08DEC03
5	3	5	15	Prototype	1	30DEC03	20JAN04	22DEC03
6	4	6	10	Mkt. Strat.	.	15DEC03	29DEC03	15DEC03
7	5	7	10	Materials	.	21JAN04	03FEB04	14JAN04
8	5	7	10	Facility	.	21JAN04	03FEB04	14JAN04
9	7	8	10	Init. Prod.	.	04FEB04	17FEB04	28JAN04
10	8	9	10	Evaluate	1	18FEB04	02MAR04	11FEB04
11	6	9	15	Test Market	.	18FEB04	09MAR04	11FEB04
12	9	10	5	Changes	1	10MAR04	16MAR04	03MAR04
13	10	11	0	Production	1	17MAR04	17MAR04	10MAR04
14	6	12	0	Marketing	.	18FEB04	18FEB04	11FEB04
15	8	6	0	Dummy	.	18FEB04	18FEB04	11FEB04

Obs	E_FINISH	L_START	L_FINISH	R_DELAY	DELAY_R	SUPPL_R
1	05DEC03	01DEC03	05DEC03	0		
2	19DEC03	08DEC03	19DEC03	0		
3	12DEC03	21JAN04	27JAN04	0		
4	12DEC03	15DEC03	19DEC03	10	deseng	
5	13JAN04	22DEC03	13JAN04	0		
6	29DEC03	28JAN04	10FEB04	0		
7	27JAN04	14JAN04	27JAN04	0		
8	27JAN04	14JAN04	27JAN04	0		
9	10FEB04	28JAN04	10FEB04	0		
10	24FEB04	18FEB04	02MAR04	0		
11	02MAR04	11FEB04	02MAR04	0		
12	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	10MAR04	10MAR04	0		
15	11FEB04	11FEB04	11FEB04	0		

Now suppose that you have one production engineer available, but you could obtain more if needed. You do not want to delay the project more than five days (the delay caused by `deseng`). The second invocation of PROC CPM sets a maximum delay of five days on the activities and specifies all four resources along with the INFEASDIAGNOSTIC option. The resource availability data set (printed in [Output 2.17.2](#)) has missing values for the resources `mktan` and `money`. Further, the resource `money` is defined to be a consumable aggregate resource (its value is ‘4’ in the first observation). Thus, this resource is used by the CPM procedure only for aggregation purposes and is not considered as a constraining resource during the scheduling process. The INFEASDIAGNOSTIC option enables CPM to assume an infinite supplementary level for all the constraining resources, and the procedure draws upon this infinite reserve, if necessary, to schedule the project with only five days of delay. In other words, PROC CPM assumes that there is an infinite supply of supplementary levels for all the relevant resources. Thus, if at any point in the scheduling process it finds that an activity does not have enough resources and it cannot be postponed any further, it schedules the activity ignoring the insufficiency of the resources.

```

proc cpm date='01dec03'd interval=weekday
      data=widgr17 holdata=holdata resin=resin17
      out=widgo17m resout=widgro17;
  tailnode tail;
  duration days;
  headnode head;
  holiday hol;
  resource deseng prodeng mktan money / period=per obstype=otype
      delayanalysis
      delay=5
      infeasdiagnostic
      cumusage
      rcprofile avprofile;

  id task;
run;

```

The Schedule data set WIDGO17M (for multiple resources) in [Output 2.17.4](#) shows the new resource-constrained schedule. With a maximum delay of five days the procedure schedules the activity ‘Anal. Market’ on January 21, 2004, using an extra production engineer as indicated by the SUPPL_R variable. Note that the SUPPL_R variable indicates the first resource in the resource list that was used beyond its primary level. Note also that it is possible to schedule the activities with only one production engineer, but the project would be delayed by more than five days.

The Usage data set, displayed in [Output 2.17.5](#), shows the amount of resources required on each day of the project. The data set contains usage and remaining resource information only for the resource-constrained schedule because PROC CPM was invoked with the RCPROFILE and AVPROFILE options in the RESOURCE statement. Note that the availability profile contains only missing values for the resource money because it was used only for aggregation purposes. Further, since this resource is a consumable resource as per the RESOURCEIN= data set, and since the CUMUSAGE option is specified, the value for Rmoney in each observation indicates the cumulative amount of money that would be needed through the beginning of the date specified in that observation if the resource constrained schedule were followed.

For the other resources, the availability profile in the Usage data set contains negative values for all the resources that were insufficient on any given day. This feature is useful for diagnosing the level of insufficiency of any resource; you can determine the problem areas by examining the availability profile for the different resources. Thus, the negative values for the resource availability profile Aprodeng indicate that, in order for the project to be scheduled as desired, you need an extra production engineer between the 21st and 27th of January, 2004. The negative values for Amktan indicate the days when a market analyst is needed for the project.

Output 2.17.4. Resource-Constrained Schedule: Multiple Resources

Use of the INFEASDIAGNOSTIC Option										
Resource Constrained Schedule: Multiple Resources										
Obs	tail	head	days	task	deseng	prodeng	mktan	money	S_START	S_FINISH
1	1	2	5	Approve Plan	1	1	1	200	01DEC03	05DEC03
2	2	3	10	Drawings	1	1	.	100	08DEC03	19DEC03
3	2	4	5	Anal. Market	.	1	1	100	21JAN04	27JAN04
4	2	3	5	Write Specs	1	1	.	150	22DEC03	29DEC03
5	3	5	15	Prototype	1	1	.	300	30DEC03	20JAN04
6	4	6	10	Mkt. Strat.	.	.	1	150	28JAN04	10FEB04
7	5	7	10	Materials	.	.	.	300	21JAN04	03FEB04
8	5	7	10	Facility	.	1	.	500	21JAN04	03FEB04
9	7	8	10	Init. Prod.	.	.	.	250	04FEB04	17FEB04
10	8	9	10	Evaluate	1	.	.	150	18FEB04	02MAR04
11	6	9	15	Test Market	.	.	1	200	18FEB04	09MAR04
12	9	10	5	Changes	1	1	.	200	10MAR04	16MAR04
13	10	11	0	Production	1	1	.	600	17MAR04	17MAR04
14	6	12	0	Marketing	.	.	1	.	18FEB04	18FEB04
15	8	6	0	Dummy	.	.	.	.	18FEB04	18FEB04

Obs	E_START	E_FINISH	L_START	L_FINISH	R_DELAY	DELAY_R	SUPPL_R
1	01DEC03	05DEC03	01DEC03	05DEC03	0		mktan
2	08DEC03	19DEC03	08DEC03	19DEC03	0		
3	08DEC03	12DEC03	21JAN04	27JAN04	30	prodeng	prodeng
4	08DEC03	12DEC03	15DEC03	19DEC03	10	deseng	
5	22DEC03	13JAN04	22DEC03	13JAN04	0		
6	15DEC03	29DEC03	28JAN04	10FEB04	0		mktan
7	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	11FEB04	02MAR04	11FEB04	02MAR04	0		mktan
12	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	10MAR04	10MAR04	0		
15	11FEB04	11FEB04	11FEB04	11FEB04	0		

Output 2.17.5. Resource Usage: Multiple Resources

Use of the INFEASDIAGNOSTIC Option									
Usage Profile: Multiple Resources									
Obs	_TIME_	Rdeseng	Adeseng	Rprodeng	Aprodeng	Rmktan	Amktan	Rmoney	Amoney
1	01DEC03	1	0	1	0	1	-1	0	.
2	02DEC03	1	0	1	0	1	-1	200	.
3	03DEC03	1	0	1	0	1	-1	400	.
4	04DEC03	1	0	1	0	1	-1	600	.
5	05DEC03	1	0	1	0	1	-1	800	.
6	08DEC03	1	0	1	0	0	0	1000	.
7	09DEC03	1	0	1	0	0	0	1100	.
8	10DEC03	1	0	1	0	0	0	1200	.
9	11DEC03	1	0	1	0	0	0	1300	.
10	12DEC03	1	0	1	0	0	0	1400	.
11	15DEC03	1	0	1	0	0	0	1500	.
12	16DEC03	1	0	1	0	0	0	1600	.
13	17DEC03	1	0	1	0	0	0	1700	.
14	18DEC03	1	0	1	0	0	0	1800	.
15	19DEC03	1	0	1	0	0	0	1900	.
16	22DEC03	1	0	1	0	0	0	2000	.
17	23DEC03	1	0	1	0	0	0	2150	.
18	24DEC03	1	0	1	0	0	0	2300	.
19	26DEC03	1	0	1	0	0	0	2450	.
20	29DEC03	1	0	1	0	0	0	2600	.
21	30DEC03	1	0	1	0	0	0	2750	.
22	31DEC03	1	0	1	0	0	0	3050	.
23	02JAN04	1	0	1	0	0	0	3350	.
24	05JAN04	1	0	1	0	0	0	3650	.
25	06JAN04	1	0	1	0	0	0	3950	.
26	07JAN04	1	0	1	0	0	0	4250	.
27	08JAN04	1	0	1	0	0	0	4550	.
28	09JAN04	1	0	1	0	0	0	4850	.
29	12JAN04	1	0	1	0	0	0	5150	.
30	13JAN04	1	0	1	0	0	0	5450	.
31	14JAN04	1	0	1	0	0	0	5750	.
32	15JAN04	1	0	1	0	0	0	6050	.
33	16JAN04	1	0	1	0	0	0	6350	.
34	19JAN04	1	0	1	0	0	0	6650	.
35	20JAN04	1	0	1	0	0	0	6950	.
36	21JAN04	0	1	2	-1	1	-1	7250	.
37	22JAN04	0	1	2	-1	1	-1	8150	.
38	23JAN04	0	1	2	-1	1	-1	9050	.
39	26JAN04	0	1	2	-1	1	-1	9950	.
40	27JAN04	0	1	2	-1	1	-1	10850	.
41	28JAN04	0	1	1	0	1	-1	11750	.
42	29JAN04	0	1	1	0	1	-1	12700	.
43	30JAN04	0	1	1	0	1	-1	13650	.
44	02FEB04	0	1	1	0	1	-1	14600	.
45	03FEB04	0	1	1	0	1	-1	15550	.
46	04FEB04	0	1	0	1	1	-1	16500	.
47	05FEB04	0	1	0	1	1	-1	16900	.
48	06FEB04	0	1	0	1	1	-1	17300	.
49	09FEB04	0	1	0	1	1	-1	17700	.
50	10FEB04	0	1	0	1	1	-1	18100	.
51	11FEB04	0	1	0	1	0	0	18500	.
52	12FEB04	0	1	0	1	0	0	18750	.
53	13FEB04	0	1	0	1	0	0	19000	.
54	16FEB04	0	1	0	1	0	0	19250	.
55	17FEB04	0	1	0	1	0	0	19500	.

Use of the INFEASDIAGNOSTIC Option									
Usage Profile: Multiple Resources									
Obs	_TIME_	Rdeseng	Adeseng	Rprodeng	Aprodeng	Rmktan	Amktan	Rmoney	Amoney
56	18FEB04	1	0	0	1	1	-1	19750	.
57	19FEB04	1	0	0	1	1	-1	20100	.
58	20FEB04	1	0	0	1	1	-1	20450	.
59	23FEB04	1	0	0	1	1	-1	20800	.
60	24FEB04	1	0	0	1	1	-1	21150	.
61	25FEB04	1	0	0	1	1	-1	21500	.
62	26FEB04	1	0	0	1	1	-1	21850	.
63	27FEB04	1	0	0	1	1	-1	22200	.
64	01MAR04	1	0	0	1	1	-1	22550	.
65	02MAR04	1	0	0	1	1	-1	22900	.
66	03MAR04	0	1	0	1	1	-1	23250	.
67	04MAR04	0	1	0	1	1	-1	23450	.
68	05MAR04	0	1	0	1	1	-1	23650	.
69	08MAR04	0	1	0	1	1	-1	23850	.
70	09MAR04	0	1	0	1	1	-1	24050	.
71	10MAR04	1	0	1	0	0	0	24250	.
72	11MAR04	1	0	1	0	0	0	24450	.
73	12MAR04	1	0	1	0	0	0	24650	.
74	15MAR04	1	0	1	0	0	0	24850	.
75	16MAR04	1	0	1	0	0	0	25050	.
76	17MAR04	0	1	0	1	0	0	25250	.

Example 2.18. Variable Activity Delay

In [Example 2.17](#), the DELAY= option is used to specify a maximum amount of delay that is allowed for all activities in the project. In some situations it may be reasonable to set the delay for each activity based on some characteristic pertaining to the activity. For example, consider the data in [Example 2.17](#) with a slightly different scenario. Suppose that no delay is allowed in activities that require a production engineer. Data set WIDGR18, displayed in [Output 2.18.1](#), is obtained from WIDGR17 using the following simple DATA step.

```

data widgr18;
  set widgr17;
  if prodeng ^= . then adelay = 0;
  else                adelay = 5;
run;

title 'Variable Activity Delay';
title2 'Data Set WIDGR18';
proc print;
  run;

```

Output 2.18.1. Activity Data Set WIDGR18

Variable Activity Delay Data Set WIDGR18									
Obs	task	days	tail	head	deseng	mktan	prodeng	money	adelay
1	Approve Plan	5	1	2	1	1	1	200	0
2	Drawings	10	2	3	1	.	1	100	0
3	Anal. Market	5	2	4	.	1	1	100	0
4	Write Specs	5	2	3	1	.	1	150	0
5	Prototype	15	3	5	1	.	1	300	0
6	Mkt. Strat.	10	4	6	.	1	.	150	5
7	Materials	10	5	7	.	.	.	300	5
8	Facility	10	5	7	.	.	1	500	0
9	Init. Prod.	10	7	8	.	.	.	250	5
10	Evaluate	10	8	9	1	.	.	150	5
11	Test Market	15	6	9	.	1	.	200	5
12	Changes	5	9	10	1	.	1	200	0
13	Production	0	10	11	1	.	1	600	0
14	Marketing	0	6	12	.	1	.	.	5
15	Dummy	0	8	6	.	.	.	.	5

PROC CPM is invoked with the ACTDELAY=ADELAY option in the RESOURCE statement. The INFEASDIAGNOSTIC option is also used to enable the procedure to schedule activities even if resources are insufficient. The output data sets are displayed in [Output 2.18.2](#) and [Output 2.18.3](#).

```

data resin17;
  input per & date7. otype $
        deseng mktan prodeng money;
  format per date7.;
  datalines;
.      restype 1 1 1 4
01dec03 reslevel 1 . 1 .
;

data holdata;
  format hol date7. name $9. ;
  input hol & date7. name & ;
  datalines;
25dec03 Christmas
01jan04 New Year
;

proc cpm date='01dec03'd
  interval=weekday
  data=widgr18
  holdata=holdata
  resin=resin17
  out=widgo18
  resout=widgro18;
  tailnode tail;
  duration days;
  headnode head;
  holiday hol;

```



```

resource deseng prodeng mktan money / period=per
                                obstype=otype
                                delayanalysis
                                actdelay=adelay
                                infeasdiagnostic
                                rcs avl t_float
                                cumusage;

id task;
run;

```

Output 2.18.2. Resource-Constrained Schedule: Variable Activity Delay

Variable Activity Delay										
Resource Constrained Schedule										
Obs	tail	head	days	task	adelay	deseng	prodeng	mktan	money	S_START
1	1	2	5	Approve Plan	0	1	1	1	200	01DEC03
2	2	3	10	Drawings	0	1	1	.	100	08DEC03
3	2	4	5	Anal. Market	0	.	1	1	100	14JAN04
4	2	3	5	Write Specs	0	1	1	.	150	08DEC03
5	3	5	15	Prototype	0	1	1	.	300	22DEC03
6	4	6	10	Mkt. Strat.	5	.	.	1	150	21JAN04
7	5	7	10	Materials	5	.	.	.	300	14JAN04
8	5	7	10	Facility	0	.	1	.	500	14JAN04
9	7	8	10	Init. Prod.	5	.	.	.	250	28JAN04
10	8	9	10	Evaluate	5	1	.	.	150	11FEB04
11	6	9	15	Test Market	5	.	.	1	200	11FEB04
12	9	10	5	Changes	0	1	1	.	200	03MAR04
13	10	11	0	Production	0	1	1	.	600	10MAR04
14	6	12	0	Marketing	5	.	.	1	.	11FEB04
15	8	6	0	Dummy	5	.	.	.	.	11FEB04

Obs	S_FINISH	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	R_DELAY	DELAY_R	SUPPL_R
1	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03	0	0		mktan
2	19DEC03	08DEC03	19DEC03	08DEC03	19DEC03	0	0		
3	20JAN04	08DEC03	12DEC03	21JAN04	27JAN04	30	25	prodeng	prodeng
4	12DEC03	08DEC03	12DEC03	15DEC03	19DEC03	5	0		deseng
5	13JAN04	22DEC03	13JAN04	22DEC03	13JAN04	0	0		
6	03FEB04	15DEC03	29DEC03	28JAN04	10FEB04	30	0		mktan
7	27JAN04	14JAN04	27JAN04	14JAN04	27JAN04	0	0		
8	27JAN04	14JAN04	27JAN04	14JAN04	27JAN04	0	0		
9	10FEB04	28JAN04	10FEB04	28JAN04	10FEB04	0	0		
10	24FEB04	11FEB04	24FEB04	18FEB04	02MAR04	5	0		
11	02MAR04	11FEB04	02MAR04	11FEB04	02MAR04	0	0		mktan
12	09MAR04	03MAR04	09MAR04	03MAR04	09MAR04	0	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	10MAR04	0	0		
14	11FEB04	11FEB04	11FEB04	10MAR04	10MAR04	20	0		
15	11FEB04	11FEB04	11FEB04	11FEB04	11FEB04	0	0		

Output 2.18.3. Resource Usage

Variable Activity Delay Usage Profile									
Obs	_TIME_	Rdeseng	Adeseng	Rprodeng	Aprodeng	Rmktan	Amktan	Rmoney	Amoney
1	01DEC03	1	0	1	0	1	-1	0	.
2	02DEC03	1	0	1	0	1	-1	200	.
3	03DEC03	1	0	1	0	1	-1	400	.
4	04DEC03	1	0	1	0	1	-1	600	.
5	05DEC03	1	0	1	0	1	-1	800	.
6	08DEC03	2	-1	2	-1	0	0	1000	.
7	09DEC03	2	-1	2	-1	0	0	1250	.
8	10DEC03	2	-1	2	-1	0	0	1500	.
9	11DEC03	2	-1	2	-1	0	0	1750	.
10	12DEC03	2	-1	2	-1	0	0	2000	.
11	15DEC03	1	0	1	0	0	0	2250	.
12	16DEC03	1	0	1	0	0	0	2350	.
13	17DEC03	1	0	1	0	0	0	2450	.
14	18DEC03	1	0	1	0	0	0	2550	.
15	19DEC03	1	0	1	0	0	0	2650	.
16	22DEC03	1	0	1	0	0	0	2750	.
17	23DEC03	1	0	1	0	0	0	3050	.
18	24DEC03	1	0	1	0	0	0	3350	.
19	26DEC03	1	0	1	0	0	0	3650	.
20	29DEC03	1	0	1	0	0	0	3950	.
21	30DEC03	1	0	1	0	0	0	4250	.
22	31DEC03	1	0	1	0	0	0	4550	.
23	02JAN04	1	0	1	0	0	0	4850	.
24	05JAN04	1	0	1	0	0	0	5150	.
25	06JAN04	1	0	1	0	0	0	5450	.
26	07JAN04	1	0	1	0	0	0	5750	.
27	08JAN04	1	0	1	0	0	0	6050	.
28	09JAN04	1	0	1	0	0	0	6350	.
29	12JAN04	1	0	1	0	0	0	6650	.
30	13JAN04	1	0	1	0	0	0	6950	.
31	14JAN04	0	1	2	-1	1	-1	7250	.
32	15JAN04	0	1	2	-1	1	-1	8150	.
33	16JAN04	0	1	2	-1	1	-1	9050	.
34	19JAN04	0	1	2	-1	1	-1	9950	.
35	20JAN04	0	1	2	-1	1	-1	10850	.
36	21JAN04	0	1	1	0	1	-1	11750	.
37	22JAN04	0	1	1	0	1	-1	12700	.
38	23JAN04	0	1	1	0	1	-1	13650	.
39	26JAN04	0	1	1	0	1	-1	14600	.
40	27JAN04	0	1	1	0	1	-1	15550	.
41	28JAN04	0	1	0	1	1	-1	16500	.
42	29JAN04	0	1	0	1	1	-1	16900	.
43	30JAN04	0	1	0	1	1	-1	17300	.
44	02FEB04	0	1	0	1	1	-1	17700	.
45	03FEB04	0	1	0	1	1	-1	18100	.
46	04FEB04	0	1	0	1	0	0	18500	.
47	05FEB04	0	1	0	1	0	0	18750	.
48	06FEB04	0	1	0	1	0	0	19000	.
49	09FEB04	0	1	0	1	0	0	19250	.
50	10FEB04	0	1	0	1	0	0	19500	.
51	11FEB04	1	0	0	1	1	-1	19750	.
52	12FEB04	1	0	0	1	1	-1	20100	.
53	13FEB04	1	0	0	1	1	-1	20450	.
54	16FEB04	1	0	0	1	1	-1	20800	.
55	17FEB04	1	0	0	1	1	-1	21150	.

Variable Activity Delay Usage Profile									
Obs	_TIME_	Rdeseng	Adeseng	Rprodeng	Aprodeng	Rmktan	Amktan	Rmoney	Amoney
56	18FEB04	1	0	0	1	1	-1	21500	.
57	19FEB04	1	0	0	1	1	-1	21850	.
58	20FEB04	1	0	0	1	1	-1	22200	.
59	23FEB04	1	0	0	1	1	-1	22550	.
60	24FEB04	1	0	0	1	1	-1	22900	.
61	25FEB04	0	1	0	1	1	-1	23250	.
62	26FEB04	0	1	0	1	1	-1	23450	.
63	27FEB04	0	1	0	1	1	-1	23650	.
64	01MAR04	0	1	0	1	1	-1	23850	.
65	02MAR04	0	1	0	1	1	-1	24050	.
66	03MAR04	1	0	1	0	0	0	24250	.
67	04MAR04	1	0	1	0	0	0	24450	.
68	05MAR04	1	0	1	0	0	0	24650	.
69	08MAR04	1	0	1	0	0	0	24850	.
70	09MAR04	1	0	1	0	0	0	25050	.
71	10MAR04	0	1	0	1	0	0	25250	.

Note from the Schedule data set that the activity 'Anal. Market' is scheduled to start on January 14, 2004, even though $(L_START + adelay)=21JAN04$. This is due to the fact that at every time interval, the scheduling algorithm looks ahead in time to detect any increase in the primary level of the resource; if the future resource profile indicates that the procedure will need to use supplementary levels anyway, the activity will not be forced to wait until $(L_START + DELAY)$. (To force the activity to wait until its latest allowed start time, use the `AWAITDELAY` option). The `DELAYANALYSIS` variables indicate that a supplementary level of the resource `prodeng` is needed to schedule the activity on 14JAN03. Note that the variable `SUPPL_R` identifies only one supplementary resource that is needed for the activity. In fact, examination of the resource requirements for the activity and the `RESOURCEOUT` data set shows that an extra market analyst is also needed between the 14th and 20th of January to schedule this activity. Likewise, the activities 'Write Specs' and 'Drawings' require a design engineer and a production engineer; both these activities start on the 8th of December. The `RESOURCEOUT` data set indicates that an extra design engineer and an extra production engineer are needed from the 8th to the 12th of December.

The next invocation of `PROC CPM` illustrates the use of the `ACTDELAY` variable to force the resource-constrained schedule to coincide with the early start schedule. The following `DATA` step uses the Schedule data set `WIDGO18` to set an activity delay variable (`actdel`) to be equal to $-T_FLOAT$. `PROC CPM` is then invoked with the `ACTDELAY` variable equal to `actdel` and the `INFEASDIAGNOSTIC` option. This forces all activities to be scheduled on or before $(L_START + actdel)$, which happens to be equal to `E_START`; thus all activities are scheduled to start at their early start time. The resulting Schedule data set is displayed in [Output 2.18.4](#). Though this is an extreme case, a similar technique could be used selectively to set the delay value for each activity (or some of the activities) to depend on the unconstrained schedule or the `T_FLOAT` value. Note that if both the `DELAY=` and `ACTDELAY=` options are specified, the `DELAY=` value is used to set the activity delay values for activities that have missing values for the `ACTDELAY` variable.

Note also that in this invocation of PROC CPM, the BASELINE statement is used to compare the early start schedule and the resource constrained schedule. Note that the S_VAR and F_VAR variables are 0 for all the activities, as is to be expected (since all activities are forced to start as per the early start schedule).

```

data negdelay;
  set widgo18;
  actdel=-t_float;
run;

proc cpm date='01dec03'd
  interval=weekday
  data=negdelay
  holidaydata=holidaydata
  resin=resin17
  out=widgo18n;
  tailnode tail;
  duration days;
  headnode head;
  holiday hol;
  resource deseng prodeng mktan money / period=per
  obstype=otype
  delayanalysis
  actdelay=actdel
  infeasdiagnostic;

baseline / set=early compare=resource;
id task;
run;

```

Output 2.18.4. Resource-Constrained Schedule: Activity Delay = - (T_FLOAT)

Variable Activity Delay														
Resource Constrained Schedule														
Activity Delay = - (T_FLOAT)														
				p					S		S		E	
				a d r					-		F		-	
				c e o m m					S		I		S	
				t s d k o					T		N		T	
O				t e e t n					A		I		A	
b				e n n a e					R		S		R	
s				l g g n y					T		H		T	
1	1	2	5	Approve Plan	0	1	1	1	200	01DEC03	05DEC03	01DEC03		
2	2	3	10	Drawings	0	1	1	.	100	08DEC03	19DEC03	08DEC03		
3	2	4	5	Anal. Market	-30	.	1	1	100	08DEC03	12DEC03	08DEC03		
4	2	3	5	Write Specs	-5	1	1	.	150	08DEC03	12DEC03	08DEC03		
5	3	5	15	Prototype	0	1	1	.	300	22DEC03	13JAN04	22DEC03		
6	4	6	10	Mkt. Strat.	-30	.	.	1	150	15DEC03	29DEC03	15DEC03		
7	5	7	10	Materials	0	.	.	.	300	14JAN04	27JAN04	14JAN04		
8	5	7	10	Facility	0	.	1	.	500	14JAN04	27JAN04	14JAN04		
9	7	8	10	Init. Prod.	0	.	.	.	250	28JAN04	10FEB04	28JAN04		
10	8	9	10	Evaluate	-5	1	.	.	150	11FEB04	24FEB04	11FEB04		
11	6	9	15	Test Market	0	.	.	1	200	11FEB04	02MAR04	11FEB04		
12	9	10	5	Changes	0	1	1	.	200	03MAR04	09MAR04	03MAR04		
13	10	11	0	Production	0	1	1	.	600	10MAR04	10MAR04	10MAR04		
14	6	12	0	Marketing	-20	.	.	1	.	11FEB04	11FEB04	11FEB04		
15	8	6	0	Dummy	0	.	.	.	.	11FEB04	11FEB04	11FEB04		

				L					B		B		F	
				R D S					-		F		-	
				F - E U					-		I S F			
				I D L P					S		I S F			
				N E A P					T		N - -			
O				I L Y L					A		I V V			
b				S A - -					R		S A A			
s				H Y R R					T		H R R			
1	05DEC03	01DEC03	05DEC03	0					mktan	01DEC03	05DEC03	0	0	
2	19DEC03	08DEC03	19DEC03	0						08DEC03	19DEC03	0	0	
3	12DEC03	21JAN04	27JAN04	0					prodeng	08DEC03	12DEC03	0	0	
4	12DEC03	15DEC03	19DEC03	0					deseng	08DEC03	12DEC03	0	0	
5	13JAN04	22DEC03	13JAN04	0						22DEC03	13JAN04	0	0	
6	29DEC03	28JAN04	10FEB04	0					mktan	15DEC03	29DEC03	0	0	
7	27JAN04	14JAN04	27JAN04	0						14JAN04	27JAN04	0	0	
8	27JAN04	14JAN04	27JAN04	0						14JAN04	27JAN04	0	0	
9	10FEB04	28JAN04	10FEB04	0						28JAN04	10FEB04	0	0	
10	24FEB04	18FEB04	02MAR04	0						11FEB04	24FEB04	0	0	
11	02MAR04	11FEB04	02MAR04	0					mktan	11FEB04	02MAR04	0	0	
12	09MAR04	03MAR04	09MAR04	0						03MAR04	09MAR04	0	0	
13	10MAR04	10MAR04	10MAR04	0						10MAR04	10MAR04	0	0	
14	11FEB04	10MAR04	10MAR04	0						11FEB04	11FEB04	0	0	
15	11FEB04	11FEB04	11FEB04	0						11FEB04	11FEB04	0	0	

Example 2.19. Activity Splitting

This example illustrates the use of activity splitting to help reduce project duration. By default, PROC CPM assumes that an activity cannot be interrupted once it is started (except for holidays and weekends). During resource-constrained scheduling, it is possible for a noncritical activity to be scheduled first, and at a later time a critical activity may be held waiting for a resource to be freed by this less critical activity.

In such situations, you may want to allow noncritical activities to be preempted by critical ones. PROC CPM enables you to specify, selectively, the activities that can be split into segments, the minimum length of each segment, and the maximum number of segments per activity.

The data set WIDGR19, displayed in [Output 2.19.1](#), contains the widget network in AON format with two resources: `prodman` and `hardware`. Suppose the production manager is required to oversee certain activities, as indicated by a '1' in the `prodman` column. `hardware` denotes some piece of equipment that is required by the activity 'Drawings' (perhaps a plotter to produce the engineering drawings). The variable `minseg` denotes the minimum length of the split segments for each activity. Missing values for this variable are set to default values (one-fifth of the activity's duration). The Resource data set WIDGRIN, displayed in [Output 2.19.2](#), indicates that both resources are replenishable, there is one production manager available from December 1, and the hardware is unavailable on the 10th and 11th of December (perhaps it is scheduled for maintenance or has been reserved for some other project).

Output 2.19.1. Activity Splitting: Activity Data Set

Activity Splitting Project Data						
Obs	task	days	succ	prodman	hardware	minseg
1	Approve Plan	5	Drawings	1	.	.
2	Approve Plan	5	Anal. Market	1	.	.
3	Approve Plan	5	Write Specs	1	.	.
4	Drawings	10	Prototype	.	1	1
5	Anal. Market	5	Mkt. Strat.	.	.	.
6	Write Specs	5	Prototype	.	.	.
7	Prototype	15	Materials	1	.	.
8	Prototype	15	Facility	1	.	.
9	Mkt. Strat.	10	Test Market	1	.	1
10	Mkt. Strat.	10	Marketing	1	.	1
11	Materials	10	Init. Prod.	.	.	.
12	Facility	10	Init. Prod.	.	.	.
13	Init. Prod.	10	Test Market	1	.	.
14	Init. Prod.	10	Marketing	1	.	.
15	Init. Prod.	10	Evaluate	1	.	.
16	Evaluate	10	Changes	1	.	.
17	Test Market	15	Changes	.	.	.
18	Changes	5	Production	.	.	.
19	Production	0		1	.	.
20	Marketing	0		.	.	.

Output 2.19.2. Activity Splitting: Resource Availability Data Set

Activity Splitting Resource Availability Data Set				
Obs	per	otype	prodman	hardware
1	.	restype	1	1
2	01DEC03	reslevel	1	1
3	10DEC03	reslevel	.	0
4	12DEC03	reslevel	.	1

Output 2.19.3. Project Schedule: Splitting Not Allowed

Activity Splitting							
Project Schedule: Splitting not Allowed							
Obs	task	succ	days	prodman	hardware	S_START	S_FINISH
1	Approve Plan	Drawings	5	1	.	01DEC03	05DEC03
2	Drawings	Prototype	10	.	1	12DEC03	26DEC03
3	Anal. Market	Mkt. Strat.	5	.	.	08DEC03	12DEC03
4	Write Specs	Prototype	5	.	.	08DEC03	12DEC03
5	Prototype	Materials	15	1	.	30DEC03	20JAN04
6	Mkt. Strat.	Test Market	10	1	.	15DEC03	29DEC03
7	Materials	Init. Prod.	10	.	.	21JAN04	03FEB04
8	Facility	Init. Prod.	10	.	.	21JAN04	03FEB04
9	Init. Prod.	Test Market	10	1	.	04FEB04	17FEB04
10	Evaluate	Changes	10	1	.	18FEB04	02MAR04
11	Test Market	Changes	15	.	.	18FEB04	09MAR04
12	Changes	Production	5	.	.	10MAR04	16MAR04
13	Production		0	1	.	17MAR04	17MAR04
14	Marketing		0	.	.	18FEB04	18FEB04

Obs	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01DEC03	05DEC03	01DEC03	05DEC03	0	0
2	08DEC03	19DEC03	08DEC03	19DEC03	0	0
3	08DEC03	12DEC03	21JAN04	27JAN04	30	0
4	08DEC03	12DEC03	15DEC03	19DEC03	5	5
5	22DEC03	13JAN04	22DEC03	13JAN04	0	0
6	15DEC03	29DEC03	28JAN04	10FEB04	30	30
7	14JAN04	27JAN04	14JAN04	27JAN04	0	0
8	14JAN04	27JAN04	14JAN04	27JAN04	0	0
9	28JAN04	10FEB04	28JAN04	10FEB04	0	0
10	11FEB04	24FEB04	18FEB04	02MAR04	5	5
11	11FEB04	02MAR04	11FEB04	02MAR04	0	0
12	03MAR04	09MAR04	03MAR04	09MAR04	0	0
13	10MAR04	10MAR04	10MAR04	10MAR04	0	0
14	11FEB04	11FEB04	10MAR04	10MAR04	20	20

In the second invocation of PROC CPM, the MINSEGMDUR= option is used in the RESOURCE statement to identify the variable minseg to the procedure. This enables the algorithm to split the ‘Drawings’ activity so that some of it is done before December 10, 2003, and the rest is scheduled to start on December 12, 2003. Likewise, the production manager is allocated to the activity ‘Mkt. Strat.’ on December 15, 2003. On the 24th of December the activity ‘Prototype’ demands the production manager, and since preemption is allowed, the earlier activity ‘Mkt. Strat.’, which is less critical than ‘Prototype’, is temporarily halted and is resumed on the 16th of January after the completion of ‘Prototype’ on the 15th of January. The Schedule data set, displayed in [Output 2.19.4](#), contains separate observations for each segment of the split activities as indicated by the variable SEGMENT_NO. Note that the project duration has been reduced by three working days, by allowing appropriate activities to be split.

```
proc cpm date='01dec03'd
      data=widgr19
      holidaydata=holidaydata resin=widgrin
      out=spltschd resout=spltrout
      interval=weekday collapse;
```



```

activity task;
duration days;
successor succ;
holiday hol;
resource prodman hardware / period=per obstype=otype
minsegmtdur=minseg
rcs avl;

id task;
run;

```

Output 2.19.4. Project Schedule: Splitting Allowed

Activity Splitting Project Schedule: Splitting Allowed						
Obs	task	succ	SEGMT_NO	days	prodman	hardware
1	Approve Plan	Drawings	.	5	1	.
2	Drawings	Prototype	.	10	.	1
3	Drawings	Prototype	1	2	.	1
4	Drawings	Prototype	2	8	.	1
5	Anal. Market	Mkt. Strat.	.	5	.	.
6	Write Specs	Prototype	.	5	.	.
7	Prototype	Materials	.	15	1	.
8	Mkt. Strat.	Test Market	.	10	1	.
9	Mkt. Strat.	Test Market	1	7	1	.
10	Mkt. Strat.	Test Market	2	3	1	.
11	Materials	Init. Prod.	.	10	.	.
12	Facility	Init. Prod.	.	10	.	.
13	Init. Prod.	Test Market	.	10	1	.
14	Evaluate	Changes	.	10	1	.
15	Test Market	Changes	.	15	.	.
16	Changes	Production	.	5	.	.
17	Production		.	0	1	.
18	Marketing		.	0	.	.

Obs	S_START	S_FINISH	E_START	E_FINISH	L_START	L_FINISH
1	01DEC03	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03
2	08DEC03	23DEC03	08DEC03	19DEC03	08DEC03	19DEC03
3	08DEC03	09DEC03	08DEC03	19DEC03	08DEC03	19DEC03
4	12DEC03	23DEC03	08DEC03	19DEC03	08DEC03	19DEC03
5	08DEC03	12DEC03	08DEC03	12DEC03	21JAN04	27JAN04
6	08DEC03	12DEC03	08DEC03	12DEC03	15DEC03	19DEC03
7	24DEC03	15JAN04	22DEC03	13JAN04	22DEC03	13JAN04
8	15DEC03	20JAN04	15DEC03	29DEC03	28JAN04	10FEB04
9	15DEC03	23DEC03	15DEC03	29DEC03	28JAN04	10FEB04
10	16JAN04	20JAN04	15DEC03	29DEC03	28JAN04	10FEB04
11	16JAN04	29JAN04	14JAN04	27JAN04	14JAN04	27JAN04
12	16JAN04	29JAN04	14JAN04	27JAN04	14JAN04	27JAN04
13	30JAN04	12FEB04	28JAN04	10FEB04	28JAN04	10FEB04
14	13FEB04	26FEB04	11FEB04	24FEB04	18FEB04	02MAR04
15	13FEB04	04MAR04	11FEB04	02MAR04	11FEB04	02MAR04
16	05MAR04	11MAR04	03MAR04	09MAR04	03MAR04	09MAR04
17	12MAR04	12MAR04	10MAR04	10MAR04	10MAR04	10MAR04
18	13FEB04	13FEB04	11FEB04	11FEB04	10MAR04	10MAR04

Example 2.20. Alternate Resources

Some projects may have two or more resource types that are interchangeable; if one resource is insufficient, the other one can be used in its place. To illustrate the use of

alternate resources, consider the widget manufacturing example with the data in AON format as shown in [Output 2.20.1](#). As in [Example 2.17](#), suppose there are two types of engineers, a design engineer and a production engineer. In addition, there is a generic pool of engineers, denoted by the variable `engpool`. The resource requirements for each category are specified in the data set `WIDGR20`.

Output 2.20.1. Alternate Resources: Activity Data Set

Scheduling with Alternate Resources						
Data Set WIDGR20						
Obs	task	days	succ	deseng	prodeng	engpool
1	Approve Plan	5	Drawings	1	1	.
2	Approve Plan	5	Anal. Market	1	1	.
3	Approve Plan	5	Write Specs	1	1	.
4	Drawings	10	Prototype	1	1	.
5	Anal. Market	5	Mkt. Strat.	.	1	.
6	Write Specs	5	Prototype	1	1	.
7	Prototype	15	Materials	1	1	1
8	Prototype	15	Facility	1	1	1
9	Mkt. Strat.	10	Test Market	.	.	.
10	Mkt. Strat.	10	Marketing	.	.	.
11	Materials	10	Init. Prod.	.	.	.
12	Facility	10	Init. Prod.	.	1	2
13	Init. Prod.	10	Test Market	.	.	2
14	Init. Prod.	10	Marketing	.	.	2
15	Init. Prod.	10	Evaluate	.	.	2
16	Evaluate	10	Changes	1	.	.
17	Test Market	15	Changes	.	.	.
18	Changes	5	Production	1	1	.
19	Production	0		.	.	.
20	Marketing	0		.	.	.

Output 2.20.2. Alternate Resources: RESOURCEIN Data Set

Scheduling with Alternate Resources						
Data Set RESIN20						
Obs	per	otype	resid	deseng	prodeng	engpool
1	.	restype		1	1	1
2	.	altprty	deseng	.	1	2
3	.	altprty	prodeng	.	.	1
4	.	suplevel		1	1	.
5	01DEC03	reslevel		1	1	4

The resource availability data set `RESIN20`, displayed in [Output 2.20.2](#), identifies all three resources as replenishable resources and indicates a primary as well as a supplementary level of availability. A new variable `resid` in the data set is used to identify resources in observations 2 and 3 that can be substituted for `deseng` and `prodeng`, respectively. These observations have the value 'altprty' for the `OBSTYPE` variable and indicate a priority for the substitution. For example, observation number 2 indicates that if `deseng` is unavailable, the procedure can use `prodeng`, and if even that is insufficient, it can draw from the engineering resource pool `engpool`. To trigger the substitution of resources, use the `RESID=` option in the `RESOURCE` statement.

Output 2.20.3. Alternate Resources Not Used

Scheduling with Alternate Resources							
Alternate Resources not used							
Obs	task	succ	days	deseng	prodeng	engpool	S_START S_FINISH
1	Approve Plan	Drawings	5	1	1	.	01DEC03 05DEC03
2	Drawings	Prototype	10	1	1	.	08DEC03 19DEC03
3	Anal. Market	Mkt. Strat.	5	.	1	.	04FEB04 10FEB04
4	Write Specs	Prototype	5	1	1	.	22DEC03 29DEC03
5	Prototype	Materials	15	1	1	1	30DEC03 20JAN04
6	Mkt. Strat.	Test Market	10	.	.	.	11FEB04 24FEB04
7	Materials	Init. Prod.	10	.	.	.	21JAN04 03FEB04
8	Facility	Init. Prod.	10	.	1	2	21JAN04 03FEB04
9	Init. Prod.	Test Market	10	.	.	2	04FEB04 17FEB04
10	Evaluate	Changes	10	1	.	.	18FEB04 02MAR04
11	Test Market	Changes	15	.	.	.	25FEB04 16MAR04
12	Changes	Production	5	1	1	.	17MAR04 23MAR04
13	Production		0	.	.	.	24MAR04 24MAR04
14	Marketing		0	.	.	.	25FEB04 25FEB04

Obs	E_START	E_FINISH	L_START	L_FINISH	R_DELAY	DELAY_R	SUPPL_R
1	01DEC03	05DEC03	01DEC03	05DEC03	0		
2	08DEC03	19DEC03	08DEC03	19DEC03	0		
3	08DEC03	12DEC03	21JAN04	27JAN04	40	prodeng	
4	08DEC03	12DEC03	15DEC03	19DEC03	10	deseng	
5	22DEC03	13JAN04	22DEC03	13JAN04	0		
6	15DEC03	29DEC03	28JAN04	10FEB04	0		
7	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	11FEB04	02MAR04	11FEB04	02MAR04	0		
12	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	10MAR04	10MAR04	0		

First, PROC CPM is invoked without reference to the RESID variable. The procedure ignores observations 2 and 3 in the RESOURCEIN data set (a message is written to the log), and the project is scheduled using the available resources; the supplementary level is not used because the project can be scheduled using only the primary resources by delaying it a few days. The project completion time is March 24, 2004 (see the schedule displayed in [Output 2.20.3](#)). The following program shows the invocation of PROC CPM.

```
proc cpm date='01dec03'd
  interval=weekday collapse
  data=widgr20 resin=resin20 holidata=holdata
  out=widgo20 resout=widgro20;
  activity task;
  duration days;
  successor succ;
  holiday hol;
  resource deseng prodeng engpool / period=per
  obstype=otype
  delayanalysis
```

```
run;                                     rcs avl;
```

Next, PROC CPM is invoked with the RESID= option, and the resulting Schedule data set is displayed in [Output 2.20.4](#). The new schedule shows that the project completion time (10MAR04) has been reduced by two weeks as a result of using alternate resources.

Output 2.20.4. Alternate Resources Used

Scheduling with Alternate Resources							
Alternate Resources Reduce Project Completion Time							
				U	U		
				d	p	e	
				e	r	n	
				s	d	p	
				y	n	n	
				g	g	l	
				s	g	g	
				g	l	g	
				g	g	l	
				g	l	g	
1	Approve Plan	Drawings	5	1	1	. 1 1 .	01DEC03
2	Drawings	Prototype	10	1	1	. 1 1 .	08DEC03
3	Anal. Market	Mkt. Strat.	5	. 1	. .	. 1 .	08DEC03
4	Write Specs	Prototype	5	1	1	. . 2	08DEC03
5	Prototype	Materials	15	1	1	1 1 1 1	22DEC03
6	Mkt. Strat.	Test Market	10	. .	. .	. . .	15DEC03
7	Materials	Init. Prod.	10	. .	. .	. . .	14JAN04
8	Facility	Init. Prod.	10	. 1	2 .	1 2 .	14JAN04
9	Init. Prod.	Test Market	10	. .	2 .	. . 2	28JAN04
10	Evaluate	Changes	10	1 .	. .	1 . .	11FEB04
11	Test Market	Changes	15	. .	. .	. . .	11FEB04
12	Changes	Production	5	1 1	. 1 1	. 1 .	03MAR04
13	Production		0	. .	. .	. . .	10MAR04
14	Marketing		0	. .	. .	. . .	11FEB04

	S	E	E	L	L	R	D	S
	—	—	—	—	—	—	—	—
	F	S	I	S	I	D	E	U
	N	T	N	T	N	E	A	P
O	I	A	I	A	I	L	Y	L
b	S	R	S	R	S	A	—	—
s	H	T	H	T	H	Y	R	R
1	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03	0		
2	19DEC03	08DEC03	19DEC03	08DEC03	19DEC03	0		
3	12DEC03	08DEC03	12DEC03	21JAN04	27JAN04	0		
4	12DEC03	08DEC03	12DEC03	15DEC03	19DEC03	0		
5	13JAN04	22DEC03	13JAN04	22DEC03	13JAN04	0		
6	29DEC03	15DEC03	29DEC03	28JAN04	10FEB04	0		
7	27JAN04	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	27JAN04	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	10FEB04	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	24FEB04	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	02MAR04	11FEB04	02MAR04	11FEB04	02MAR04	0		
12	09MAR04	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	11FEB04	10MAR04	10MAR04	0		

When resource substitution is allowed, the procedure adds a new variable prefixed by a ‘U’ for each resource variable; this new variable specifies the actual resources

used for each activity (as opposed to the resource *required*). Note that the activity ‘Anal. Market’ requires one production engineer who is tied up with the activity ‘Drawings’ on the 8th of December. Since resource substitution is allowed, the procedure uses an engineer from `engpool` as indicated by a missing value for `Uprodeng` and a ‘1’ for `Uengpool` in the third observation. Likewise, the activity ‘Write Specs’ is scheduled by substituting one engineer from `engpool` for a design engineer and one for a production engineer to obtain `Udeseng=.`, `Uprodeng=.`, and `Uengpool=2` in observation number 4. It is evident from the project finish date (`S_FINISH=L_FINISH=‘10MAR04’`) that resource substitution has enabled the project to be completed without any delay. In fact, the `DELAYANALYSIS` variables indicate that there is no delay in any of the activities (`R_DELAY=0` and `DELAY_R=.` for all activities). Note also that supplementary levels are not used (`SUPPL_R=.`) for any of the resources (recall that use of supplementary levels is triggered by the specification of a finite value for `DELAY`).

The following program produced [Output 2.20.4](#):

```
proc cpm date='01dec03'd
    interval=weekday collapse
    data=widgr20 resin=resin20 holidata=holidata
    out=widgalt resout=widralt;
activity task;
duration days;
successor succ;
holiday hol;
resource deseng prodeng engpool / period=per
                                obstype=otype
                                delayanalysis
                                resid=resid
                                rcs avl;
run;
```

The next two invocations of PROC CPM illustrate the use of both supplementary as well as alternate resources. Note from the output data set, displayed in [Output 2.20.5](#), that once again the project is completed without any delay. Note also that the activity ‘Write Specs’ has used a supplementary resource whereas ‘Anal. Market’ has used an alternate resource. By default, when the `DELAY=` option is used, it forces the procedure to use supplementary resources before alternate resources. To invert this order so that alternate resources are used before supplementary resources, use the `ALTBFORESUP` option in the `RESOURCE` statement, as illustrated in the second invocation of CPM in the following code. The resulting schedule is displayed in [Output 2.20.6](#); this schedule is, in fact, the same as the schedule displayed in [Output 2.20.4](#), obtained without the `DELAY=0` and the `ALTBFORESUP` options.

```
/* Invoke CPM with the DELAY=0 option */
proc cpm date='01dec03'd
    interval=weekday collapse
    data=widgr20 resin=resin20 holidata=holidata
    out=widgdsup resout=widrdsup;
activity task;
```

```

duration days;
successor succ;
holiday hol;
resource deseng prodeng engpool / period=per
                                obstype=otype
                                delayanalysis
                                delay=0
                                resid=resid
                                rcs avl;

run;

/* Invoke CPM with the DELAY=0 and ALTBEOFRESUP options */
proc cpm date='01dec03'd
        interval=weekday collapse
        data=widgr20 resin=resin20 holdata=holdata
        out=widgdsup resout=widrdsup;
activity task;
duration days;
successor succ;
holiday hol;
resource deseng prodeng engpool / period=per
                                obstype=otype
                                delayanalysis
                                delay=0
                                resid=resid altbeforeSUP
                                rcs avl;

run;

```

Output 2.20.5. Supplementary Resources Used Before Alternate Resources

Scheduling with Alternate Resources									
DELAY=0, Supplementary Resources Used instead of Alternate									
				d	e	U	U	S	S
				e	o	e	e	—	—
				s	g	d	d	S	F
				a	e	e	e	T	I
				y	n	o	n	A	N
				s	g	l	g	R	S
				c	g	g	l	T	H
1	Approve Plan	Drawings	5	1	1	. 1	1	. 01DEC03	05DEC03
2	Drawings	Prototype	10	1	1	. 1	1	. 08DEC03	19DEC03
3	Anal. Market	Mkt. Strat.	5	.	1	. .	. 1	. 08DEC03	12DEC03
4	Write Specs	Prototype	5	1	1	. 1	1	. 08DEC03	12DEC03
5	Prototype	Materials	15	1	1	1	1	1 22DEC03	13JAN04
6	Mkt. Strat.	Test Market	10	.	.	. .	. .	. 15DEC03	29DEC03
7	Materials	Init. Prod.	10	.	.	. .	. .	. 14JAN04	27JAN04
8	Facility	Init. Prod.	10	.	1	2 .	1 2	14JAN04	27JAN04
9	Init. Prod.	Test Market	10	.	.	2 .	. 2	28JAN04	10FEB04
10	Evaluate	Changes	10	1	.	. 1	. .	11FEB04	24FEB04
11	Test Market	Changes	15	.	.	. .	. .	11FEB04	02MAR04
12	Changes	Production	5	1	1	. 1	1	. 03MAR04	09MAR04
13	Production		0	.	.	. .	. .	10MAR04	10MAR04
14	Marketing		0	.	.	. .	. .	11FEB04	11FEB04

	E	E	L	—	R	D	S
	—	F	—	F	—	E	U
	S	I	S	I	D	L	P
	T	N	T	N	E	A	P
O	A	I	A	I	L	Y	L
b	R	S	R	S	A	—	—
s	T	H	T	H	Y	R	R
1	01DEC03	05DEC03	01DEC03	05DEC03	0		
2	08DEC03	19DEC03	08DEC03	19DEC03	0		
3	08DEC03	12DEC03	21JAN04	27JAN04	0		
4	08DEC03	12DEC03	15DEC03	19DEC03	0	deseng	
5	22DEC03	13JAN04	22DEC03	13JAN04	0		
6	15DEC03	29DEC03	28JAN04	10FEB04	0		
7	14JAN04	27JAN04	14JAN04	27JAN04	0		
8	14JAN04	27JAN04	14JAN04	27JAN04	0		
9	28JAN04	10FEB04	28JAN04	10FEB04	0		
10	11FEB04	24FEB04	18FEB04	02MAR04	0		
11	11FEB04	02MAR04	11FEB04	02MAR04	0		
12	03MAR04	09MAR04	03MAR04	09MAR04	0		
13	10MAR04	10MAR04	10MAR04	10MAR04	0		
14	11FEB04	11FEB04	10MAR04	10MAR04	0		

Output 2.20.6. Alternate Resources Used Before Supplementary Resources

Scheduling with Alternate Resources										
DELAY=0, Alternate Resources Used instead of Supplementary										
O b s k										
U p e U p e S										
d r n d r n _										
e o g e o g S										
T										
A										
R										
T										
1	Approve Plan	Drawings	5	1	1	.	1	1	.	01DEC03
2	Drawings	Prototype	10	1	1	.	1	1	.	08DEC03
3	Anal. Market	Mkt. Strat.	5	.	1	.	.	.	1	08DEC03
4	Write Specs	Prototype	5	1	1	.	.	.	2	08DEC03
5	Prototype	Materials	15	1	1	1	1	1	1	22DEC03
6	Mkt. Strat.	Test Market	10	.	.	.	.	.	.	15DEC03
7	Materials	Init. Prod.	10	.	.	.	.	.	.	14JAN04
8	Facility	Init. Prod.	10	.	1	2	.	1	2	14JAN04
9	Init. Prod.	Test Market	10	.	.	2	.	.	2	28JAN04
10	Evaluate	Changes	10	1	.	.	1	.	.	11FEB04
11	Test Market	Changes	15	.	.	.	.	.	.	11FEB04
12	Changes	Production	5	1	1	.	1	1	.	03MAR04
13	Production		0	.	.	.	.	.	.	10MAR04
14	Marketing		0	.	.	.	.	.	.	11FEB04
S E L R D S										
_ E _ L _ R D S										
F _ F _ F _ E U										
I S I S I D L P										
N T N T N E A P										
O I A I A I L Y L										
b S R S R S A _ _										
s H T H T H Y R R										
1	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03	0				
2	19DEC03	08DEC03	19DEC03	08DEC03	19DEC03	0				
3	12DEC03	08DEC03	12DEC03	21JAN04	27JAN04	0				
4	12DEC03	08DEC03	12DEC03	15DEC03	19DEC03	0				
5	13JAN04	22DEC03	13JAN04	22DEC03	13JAN04	0				
6	29DEC03	15DEC03	29DEC03	28JAN04	10FEB04	0				
7	27JAN04	14JAN04	27JAN04	14JAN04	27JAN04	0				
8	27JAN04	14JAN04	27JAN04	14JAN04	27JAN04	0				
9	10FEB04	28JAN04	10FEB04	28JAN04	10FEB04	0				
10	24FEB04	11FEB04	24FEB04	18FEB04	02MAR04	0				
11	02MAR04	11FEB04	02MAR04	11FEB04	02MAR04	0				
12	09MAR04	03MAR04	09MAR04	03MAR04	09MAR04	0				
13	10MAR04	10MAR04	10MAR04	10MAR04	10MAR04	0				
14	11FEB04	11FEB04	11FEB04	10MAR04	10MAR04	0				

Example 2.21. PERT Assumptions and Calculations

This example illustrates the PERT statistical approach. Throughout this chapter, it has been assumed that the activity duration times are precise values determined uniquely. In practice, however, each activity is subject to a number of chance sources of variation and it is impossible to know, a priori, the duration of the activity. The PERT statistical approach is used to include uncertainty about durations in scheduling. For a detailed discussion about various assumptions, techniques, and cautions related to the PERT approach, refer to Moder, Phillips, and Davis (1983) and Elmaghraby (1977).

A simple model is used here to illustrate how PROC CPM can incorporate some of these ideas. A more detailed example can be found in *SAS/OR Software: Project Management Examples*.

Consider the widget manufacturing example. To perform PERT analysis, you need to provide three estimates of activity duration: a pessimistic estimate (tp), an optimistic estimate (to), and a modal estimate (tm). These three estimates are used to obtain a weighted average that is assumed to be a reasonable estimate of the activity duration. Note that the time estimates for the activities must be independent for the analysis to be considered valid. Furthermore, the distribution of activity duration times is purely hypothetical, as no statistical sampling is likely to be feasible on projects of a unique nature to be accomplished at some indeterminate time in the future. Often, the time estimates used are based on past experience with similar projects.

To derive the formula for the mean, you must assume some functional form for the unknown distribution. The well-known Beta distribution is commonly used, as it has the desirable properties of being contained inside a finite interval and can be symmetric or skewed, depending on the location of the mode relative to the optimistic and pessimistic estimates. A linear approximation of the exact formula for the mean of the beta distribution weights the three time estimates as follows:

$$(tp + (4*tm) + to) / 6$$

The following program saves the network (AOA format) from [Example 2.2](#) with three estimates of activity durations in a SAS data set. The DATA step also calculates the weighted average duration for each activity. Following the DATA step, PROC CPM is invoked to produce the schedule plotted on a Gantt chart in [Output 2.21.1](#). The E_FINISH time for the final activity in the project contains the mean project completion time based on the duration estimates that are used.

```

title 'PERT Assumptions and Calculations';
  /* Activity-on-Arc representation of the project
    with three duration estimates */
data widgpert;
  format task $12. ;
  input task & tail head tm tp to;
  dur = (tp + 4*tm + to) / 6;
  datalines;
Approve Plan    1  2   5  7  3
Drawings      2  3  10 11  6
Anal. Market  2  4   5  7  3
Write Specs    2  3   5  7  3
Prototype     3  5  15 12  9
Mkt. Strat.   4  6  10 11  9
Materials     5  7  10 12  8
Facility      5  7  10 11  9
Init. Prod.   7  8  10 12  8
Evaluate      8  9   9 13  8
Test Market  6  9  14 15 13
Changes       9 10   5  6  4

```

```

Production      10  11   0   0   0
Marketing       6  12   0   0   0
Dummy          8   6   0   0   0
;

proc cpm data=widgpert out=sched
    date='1dec03'd;
    tailnode tail;
    headnode head;
    duration dur;
    id task;
run;

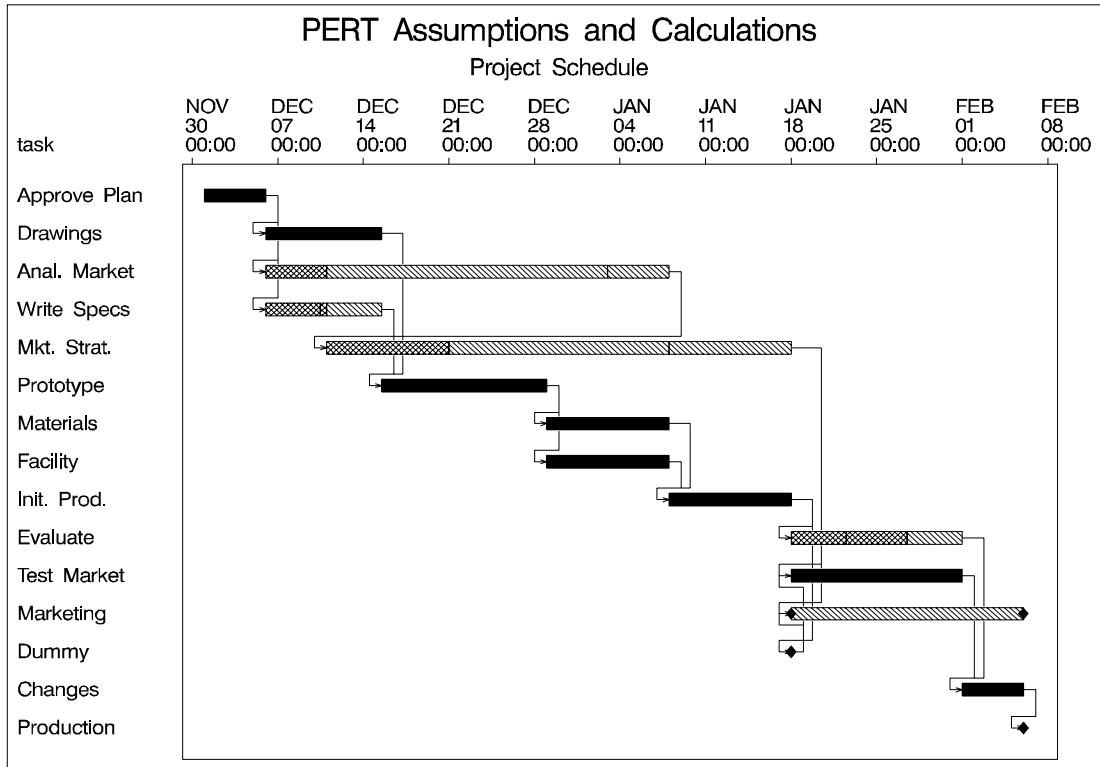
proc sort;
    by e_start;
run;

goptions vpos=50 hpos=80 border;
proc gantt graphics data=sched;
    chart / compress tailnode=tail headnode=head
           font=swiss height=1.5 nojobnum skip=2
           dur=dur increment=7 nolegend
           cframe=ligr;
    id task;
run;

```

Some words of caution are worth mentioning with regard to the traditional PERT approach. The estimate of the mean project duration obtained in this instance always underestimates the true value since the length of a critical path is a convex function of the activity durations. The original PERT model developed by Malcolm et al. (1959) provides a way to estimate the variance of the project duration as well as calculating the probabilities of meeting certain target dates and so forth. Their analysis relies on an implicit assumption that you may ignore all activities that are not on the critical path in the deterministic problem that is derived by setting the activity durations equal to the mean value of their distributions. It then applies the Central Limit Theorem to the duration of this critical path and interprets the result as pertaining to the project duration.

Output 2.21.1. PERT Statistical Estimates: Gantt Chart



However, when the activity durations are random variables, each path of the project network is a likely candidate to be the critical path. Every outcome of the activity durations could result in a different longest path. Furthermore, there could be several dependent paths in the network in the sense that they share at least one common arc. Thus, in the most general case, the length of a longest path would be the maximum of a set of, possibly dependent, random variables. Evaluating or approximating the distribution of the longest path, even under very specific distributional assumptions on the activity durations is not a very easy problem. It is not surprising that this topic is the subject of much research.

In view of the inaccuracies that can stem from the original PERT assumptions, many people prefer to resort to the use of Monte Carlo Simulation. Van Slyke (1963) made the first attempt at straightforward simulation to analyze the distribution of the critical path. Refer to Elmaghraby (1977) for a detailed synopsis of the pitfalls of making traditional PERT assumptions and for an introduction to simulation techniques for activity networks.

Example 2.22. Scheduling Course - Teacher Combinations

This example demonstrates the use of PROC CPM for a typical scheduling problem that may not necessarily fit into a conventional project management scenario. Such problems abound in practice and can usually be solved using a mathematical programming model. Here, the problem is modeled as a resource-allocation problem using PROC CPM, illustrating the richness of the modeling environment that is available with the SAS System. (Refer also to Kulkarni (1991) and SAS/OR

Software: Project Management Examples for another example of course scheduling using PROC CPM.)

A committee for academically gifted children wishes to conduct some special classes on weekends. There are four subjects that are to be taught and a number of teachers available to teach them. Only certain course-teacher combinations are allowed. There is a constraint on the number of rooms that are available and some teachers may not be able to teach at certain times. Possible class times are one-hour periods between 9 a.m and 12 noon on Saturdays and Sundays. The goal is to determine a feasible schedule of classes specifying the teacher that is to teach each class.

Suppose that there are four courses, c_1 , c_2 , c_3 , and c_4 , and three teachers, t_1 , t_2 , and t_3 . There are several ways of modeling this problem; one possible way is to form distinct classes for each possible course-teacher combination and treat each of these as a distinct activity that needs to be scheduled. For example, if course c_1 can be taught by teachers t_1 , t_2 , and t_3 , define three activities, ‘ c_1t_1 ’, ‘ c_1t_2 ’, and ‘ c_1t_3 ’. The resources for this problem are the courses, the teachers, and the number of rooms. In particular, the resources needed for a particular activity, say, ‘ c_1t_3 ’, are c_1 and t_3 .

The following constraints are imposed:

- Course 1 can be taught by Teachers 1, 2, and 3; Course 2 can be taught by Teachers 1 and 3; Course 3 can be taught by Teachers 1, 2, and 3; and Course 4 can be taught by Teachers 1 and 2.
- The total number of classes taught at any time cannot exceed NROOMS.
- Class ‘ c_1t_j ’ (if such a course-teacher combination is allowed) can be taught only at times when teacher t_j is available.
- At any given time, a teacher can teach only one class.
- At any given time, only one class is to be taught for any given course.

The following program uses PROC CPM to schedule the classes. The schedule is obtained in terms of unformatted numeric values; the times 1, 2, 3, 4, 5, and 6 are interpreted as the six different time slots that are possible, namely, Saturday 9, 10, and 11 a.m. and Sunday 9, 10, and 11 a.m.

The data set **CLASSES** is the Activity data set, and it indicates the possible course-teacher combinations and identifies the specific room, teacher, and course as the resources required. For each activity, the duration is 1 unit. Note that, in this example, there are no precedence constraints between the activities; the resource availability dictates the schedule entirely. However, there may be situations (such as prerequisite courses) that impose precedence constraints.

The Resource data set, **RESOURCE**, specifies resource availabilities. The period variable, **per**, indicates the time period from which resources are available. Since only one class corresponding to a given course is to be taught at a given time, the availability for $c_1 - c_4$ is specified as ‘1’. Teacher 2 is available only on Sunday; thus, specify the availability of t_2 to be 1 from time period 4. The total number of rooms available at a given time is three. Thus, no more than three classes can be scheduled at a given time.

In the invocation of PROC CPM, the STOPDATE= option is used in the RESOURCE statement, thus restricting resource constrained scheduling to the first six time periods. Not all of the specified activities may be scheduled within the time available, in which case the unscheduled activities represent course-teacher combinations that are not feasible under the given conditions. The schedule obtained by PROC CPM is saved in a data set that is displayed, in [Output 2.22.1](#), after formatting the activity names and the schedule times appropriately. Note that, in this example, all the course-teacher combinations are scheduled within the two-day time period.

```

title 'Scheduling Course / Teacher Combinations';
data classes;
  input class $ succ $ dur c1-c4 t1-t3 nrooms;
  datalines;
c1t1 . 1 1 . . . 1 . . 1
c1t2 . 1 1 1 . . . 1 . . 1
c1t3 . 1 1 1 . . . . . 1 1
c2t1 . 1 . 1 . . . 1 . . 1
c2t3 . 1 . 1 . . . . . 1 1
c3t1 . 1 . . 1 . 1 . . 1
c3t2 . 1 . . 1 . . 1 . 1
c3t3 . 1 . . 1 . . . 1 1
c4t1 . 1 . . . 1 1 . . 1
c4t2 . 1 . . . 1 . 1 . 1
;

data resource;
  input per c1-c4 t1-t3 nrooms;
  datalines;
1 1 1 1 1 1 . 1 3
4 . . . . . 1 . .
;

proc cpm data=classes out=sched
  resin=resource;
  activity class;
  duration dur;
  successor succ;
  resource c1-c4 t1-t3 nrooms / period=per stopdate=6;
run;

proc format;
  value classtim
    1 = 'Saturday 9:00-10:00'
    2 = 'Saturday 10:00-11:00'
    3 = 'Saturday 11:00-12:00'
    4 = 'Sunday 9:00-10:00'
    5 = 'Sunday 10:00-11:00'
    6 = 'Sunday 11:00-12:00'
    7 = 'Not Scheduled'
  ;
  value $classt
    c1t1 = 'Class 1, Teacher 1'
    c1t2 = 'Class 1, Teacher 2'

```

```

c1t3 = 'Class 1, Teacher 3'
c2t1 = 'Class 2, Teacher 1'
c2t2 = 'Class 2, Teacher 2'
c2t3 = 'Class 2, Teacher 3'
c3t1 = 'Class 3, Teacher 1'
c3t2 = 'Class 3, Teacher 2'
c3t3 = 'Class 3, Teacher 3'
c4t1 = 'Class 4, Teacher 1'
c4t2 = 'Class 4, Teacher 2'
c4t3 = 'Class 4, Teacher 3'
;

data schedtim;
  set sched;
  format classtim classtim.;
  format class $classt.;
  if (s_start <= 6) then classtim = s_start;
  else
      classtim = 7;
run;

title2 'Schedule of Classes';
proc print;
  id class;
  var classtim;
run;

```

Output 2.22.1. Class Schedule

Scheduling Course / Teacher Combinations Schedule of Classes			
class		classtim	
Class 1, Teacher 1	Saturday	9:00-10:00	
Class 1, Teacher 2	Sunday	9:00-10:00	
Class 1, Teacher 3	Saturday	10:00-11:00	
Class 2, Teacher 1	Saturday	10:00-11:00	
Class 2, Teacher 3	Saturday	9:00-10:00	
Class 3, Teacher 1	Saturday	11:00-12:00	
Class 3, Teacher 2	Sunday	10:00-11:00	
Class 3, Teacher 3	Sunday	9:00-10:00	
Class 4, Teacher 1	Sunday	9:00-10:00	
Class 4, Teacher 2	Sunday	11:00-12:00	

There may be several other constraints that you want to impose on the courses scheduled. These can usually be modeled suitably by changing the resource availability profile. For example, suppose that you want to schedule more classes at 10 a.m. and fewer at other times. The following program creates a new Resource data set, RESOURC2, that changes the number of rooms available. Again, PROC CPM is invoked with the STOPDATE= option, and the resulting schedule is displayed in [Output 2.22.2](#). The schedule can also be displayed graphically using the NETDRAW procedure, as illustrated in a similar problem in [Example 7.16](#) in [Chapter 7](#), “The NETDRAW Procedure.”

```

data resourc2;
  input per c1-c4 t1-t3 nrooms;
  datalines;
1      1  1  1  1  1  .  1  1
2      .  .  .  .  .  .  .  3
3      .  .  .  .  .  .  .  2
4      .  .  .  .  .  1  .  1
5      .  .  .  .  .  .  .  3
;

proc cpm data=classes out=sched2
  resin=resourc2;
  activity class;
  duration dur;
  successor succ;
  resource c1-c4 t1-t3 nrooms / period=per stopdate=6;
run;

data schedtim;
  set sched2;
  format classtim classtim.;
  format class $classt.;
  if (s_start <= 6) then classtim = s_start;
  else classtim = 7;
run;

title2 'Alternate Schedule with Additional Constraints';
proc print;
  id class;
  var classtim;
run;

```

Output 2.22.2. Alternate Class Schedule

Scheduling Course / Teacher Combinations
 Alternate Schedule with Additional Constraints

class	classtim
Class 1, Teacher 1	Saturday 9:00-10:00
Class 1, Teacher 2	Sunday 9:00-10:00
Class 1, Teacher 3	Saturday 10:00-11:00
Class 2, Teacher 1	Saturday 10:00-11:00
Class 2, Teacher 3	Saturday 11:00-12:00
Class 3, Teacher 1	Saturday 11:00-12:00
Class 3, Teacher 2	Sunday 10:00-11:00
Class 3, Teacher 3	Sunday 11:00-12:00
Class 4, Teacher 1	Sunday 10:00-11:00
Class 4, Teacher 2	Sunday 11:00-12:00

Example 2.23. Multiproject Scheduling

This example illustrates multiproject scheduling. Consider a Survey project that contains three phases, Plan, Prepare, and Implement, with each phase containing more than one activity. You can consider each phase of the project as a subproject within

the master project, Survey. Each subproject in turn contains the lowest level activities, also referred to as the leaf tasks. The Activity data set, containing the task durations, project hierarchy, and the precedence constraints, is displayed in [Output 2.23.1](#).

The PROJECT and ACTIVITY variables together define the project hierarchy using the parent/child relationship. Thus, the subproject, 'Plan', contains the two leaf tasks, 'plan sur' and 'design q'. Precedence constraints are specified between leaf tasks as well as between subprojects. For example, the subproject 'Prepare' is followed by the subproject 'Implement'. Durations are specified for all the tasks in the project, except for the master project 'Survey'.

In addition to the Activity data set, define a Holiday data set, also displayed in [Output 2.23.1](#).

Output 2.23.1. Survey Project

Survey Project						
Activity Data Set SURVEY						
Obs id	activity	duration	succ1	succ2	succ3	project
1	Plan Survey	plan sur	4	hire per	design q	Plan
2	Hire Personnel	hire per	5	trn per		Prepare
3	Design Questionnaire	design q	3	trn per	select h print q	Plan
4	Train Personnel	trn per	3			Prepare
5	Select Households	select h	3			Prepare
6	Print Questionnaire	print q	4			Prepare
7	Conduct Survey	cond sur	10	analyze		Implement
8	Analyze Results	analyze	6			Implement
9	Plan	Plan	6			Survey
10	Prepare	Prepare	8	Implement		Survey
11	Implement	Implement	18			Survey
12	Survey Project	Survey	.			

Survey Project	
Holiday Data Set HOLIDATA	
Obs	hol
1	09APR04

The following statements invoke PROC CPM with a PROJECT statement identifying the parent task for each subtask in the Survey project. The calendar followed is a weekday calendar with a holiday defined on April 9, 2004. The ORDERALL option on the PROJECT statement creates the ordering variables ES_ASC and LS_ASC in the Schedule data set, and the ADDWBS option creates a work breakdown structure code for the project. The Schedule data set is displayed in [Output 2.23.2](#), after being sorted by the variable ES_ASC.

Note that the PROJ_DUR variable is missing for all the leaf tasks, and it contains the project duration for the supertasks. The project duration is computed as the span of all the subtasks of the supertask. The PROJ_LEV variable specifies the level of the subtask within the tree defining the project hierarchy, starting with the level '0' for the master project (or the root), 'Survey'. The variable WBS_CODE contains

the Work Breakdown Structure code defined by the CPM procedure using the project hierarchy.

```
proc cpm data=survey date='29mar04'd out=survout1
    interval=weekday holidata=holidata;
    activity activity;
    successor succl-succ3;
    duration duration;
    id id;
    holiday hol;
    project project / orderall addwbs;
run;

proc sort;
    by es_asc;
run;

title 'Conducting a Market Survey';
title2 'Early and Late Start Schedule';
proc print;
run;
```

Output 2.23.2. Survey Project Schedule

Conducting a Market Survey									
Early and Late Start Schedule									
	P	P	W	a					d
o	R	R	B	c					u
j	O	O	S	t					r
e	J	J	_	i	s	s	s	s	a
b	_	_	C	v	u	u	u	u	t
s	D	L	O	i	c	c	c	c	i
t	U	E	D	t	c	c	c	c	o
	R	V	E	y	1	2	3	3	n
1		28	0	0	Survey				.
2	Survey	7	1	0.0	Plan				6
3	Plan	.	2	0.0.0	plan sur	hire per	design q		4
4	Plan	.	2	0.0.1	design q	trn per	select h	print q	3
5	Survey	8	1	0.1	Prepare	Implement			8
6	Prepare	.	2	0.1.0	hire per	trn per			5
7	Prepare	.	2	0.1.2	select h				3
8	Prepare	.	2	0.1.3	print q				4
9	Prepare	.	2	0.1.1	trn per				3
10	Survey	16	1	0.2	Implement				18
11	Implement	.	2	0.2.0	cond sur	analyze			10
12	Implement	.	2	0.2.1	analyze				6

	E	L	L	T	F	E	L
	-	-	-	-	-	-	-
	S	I	S	I	F	F	S
	T	N	T	N	L	L	-
O	A	I	A	I	O	O	A
b	R	S	R	S	A	A	S
s	T	H	T	H	T	T	C

1	Survey Project	29MAR04	06MAY04	29MAR04	06MAY04	0	0	0	0
2	Plan	29MAR04	06APR04	29MAR04	07APR04	1	1	1	1
3	Plan Survey	29MAR04	01APR04	29MAR04	01APR04	0	0	2	2
4	Design Questionnaire	02APR04	06APR04	05APR04	07APR04	1	0	3	3
5	Prepare	02APR04	14APR04	02APR04	14APR04	0	0	4	4
6	Hire Personnel	02APR04	08APR04	02APR04	08APR04	0	0	5	5
7	Select Households	07APR04	12APR04	12APR04	14APR04	2	2	6	8
8	Print Questionnaire	07APR04	13APR04	08APR04	14APR04	1	1	7	6
9	Train Personnel	12APR04	14APR04	12APR04	14APR04	0	0	8	7
10	Implement	15APR04	06MAY04	15APR04	06MAY04	0	0	9	9
11	Conduct Survey	15APR04	28APR04	15APR04	28APR04	0	0	10	10
12	Analyze Results	29APR04	06MAY04	29APR04	06MAY04	0	0	11	11

Next, a Gantt chart of the master project schedule is produced with the subtasks of each project indented under the parent task. To produce the required indentation, prefix the Activity description (saved in the variable id) by a suitable number of blanks using a simple DATA step. The following program shows the DATA step and the invocation of the GANTT procedure; the resulting Gantt chart is plotted in [Output 2.23.3](#). Note the precedence constraints between the two supertasks ‘Prepare’ and ‘Implement’.

```
data gant;
  length id $26.;
  set survout1;
  if proj_lev=1 then id="  ||id;
```

```

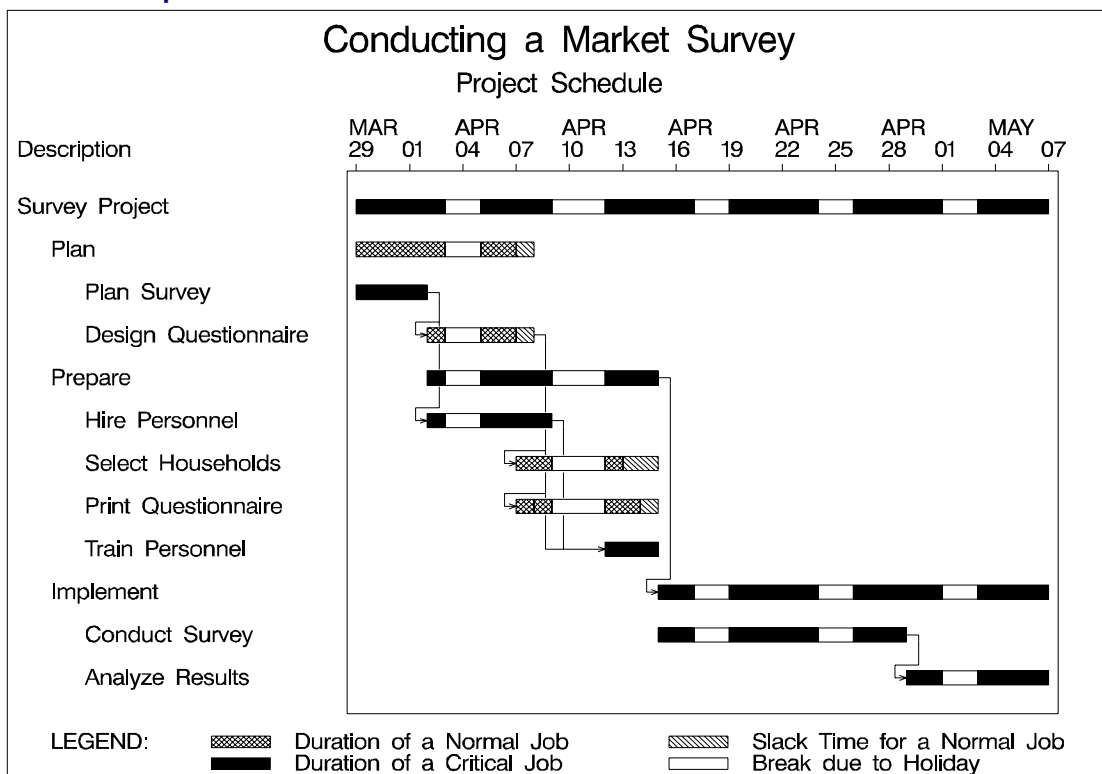
else if proj_lev=2 then id="      "||id;
run;

goptions hpos=80 vpos=43;
title c=black f=swiss 'Conducting a Market Survey';
title2 c=black f=swiss h=1.5 'Project Schedule';

proc gantt graphics data=gant holidata=holidata;
  chart / holiday=(hol)
        interval=weekday
        font=swiss skip=2 height=1.2
        nojobnum
        compress noextrange
        activity=activity succ=(succ1-succ3)
        cprec=cyan cmile=magenta
        caxis=black cframe=ligr;
  id id;
run;

```

Output 2.23.3. Gantt Chart of Schedule



PROJ_LEV, WBS_CODE, and other project-related variables can be used to display selected information about specific subprojects, summary information about subprojects at a given level of the hierarchy, and more. For example, the following statements display the summary schedule of the first level subtasks of the Survey project (Output 2.23.4).

```

title 'Market Survey';
title2 'Summary Schedule';

```

```

proc print data=survout1;
  where proj_lev=1;
  id activity;
  var proj_dur duration e_start--t_float;
run;

```

Output 2.23.4. Survey Project Summary

Market Survey Summary Schedule							
activity	PROJ_DUR	duration	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT
Plan	7	6	29MAR04	06APR04	29MAR04	07APR04	1
Prepare	8	8	02APR04	14APR04	02APR04	14APR04	0
Implement	16	18	15APR04	06MAY04	15APR04	06MAY04	0

The variable `WBS_CODE` in the Schedule data set (see [Output 2.23.2](#)) contains the Work Breakdown structure code defined by the CPM procedure. This code is defined to be '0.1' for the subproject 'Prepare'. Thus, the values of `WBS_CODE` for all subtasks of this subproject are prefixed by '0.1'. To produce reports for the subproject 'Prepare', you can use a simple WHERE clause to subset the required observations from the Schedule data set, as shown in the following statements.

```

title 'Market Survey';
title2 'Sub-Project Schedule';
proc print data=survout1;
  where substr(WBS_CODE,1,3) = "0.1";
  id activity;
  var project--activity duration e_start--t_float;
run;

```

Output 2.23.5. Subproject Schedule

Market Survey Sub-Project Schedule											
a		P	P	W	a	d		E	L		
c	p	R	R	B	c	u	E	-	L		
t	r	O	O	S	t	r	-	F	-		
i	o	J	J	-	i	a	S	I	S		
v	j	-	-	C	v	t	T	N	T		
i	e	D	L	O	i	i	A	I	A		
t	c	U	E	D	t	o	R	S	R		
y	t	R	V	E	y	n	T	H	T		
Prepare	Survey	8	1	0.1	Prepare	8	02APR04	14APR04	02APR04	14APR04	0
hire per	Prepare	.	2	0.1.0	hire per	5	02APR04	08APR04	02APR04	08APR04	0
select h	Prepare	.	2	0.1.2	select h	3	07APR04	12APR04	12APR04	14APR04	2
print q	Prepare	.	2	0.1.3	print q	4	07APR04	13APR04	08APR04	14APR04	1
trn per	Prepare	.	2	0.1.1	trn per	3	12APR04	14APR04	12APR04	14APR04	0

In the first invocation of PROC CPM, the Survey project is scheduled with only a specification for the project start date. Continuing, this example shows how you can impose additional constraints on the master project or on the individual subprojects.

First, suppose that you impose a FINISHBEFORE constraint on the Survey project by specifying the FBDATE to be May 10, 2004. The following program schedules the project with a *project start and finish* specification. The resulting summary schedule for the subprojects is shown in [Output 2.23.6](#). Note that the late finish time of the project is the 7th of May because there is a weekend on the 8th and 9th of May, 2004.

```
proc cpm data=survey date='29mar04'd out=survout2
      interval=weekday holidata=holidata
      fbdate='10may04'd; /* project finish date */
      activity activity;
      successor succ1-succ3;
      duration duration;
      id id;
      holiday hol;
      project project / orderall addwbs;
run;

title 'Market Survey';
title2 'Summary Schedule: FBDATE Option';
proc print data=survout2;
      where proj_lev=1; /* First level subprojects */
      id activity;
      var proj_dur duration e_start--t_float;
run;
```

Output 2.23.6. Summary Schedule: FBDATE Option

Market Survey							
Summary Schedule: FBDATE Option							
activity	PROJ_DUR	duration	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT
Plan	7	6	29MAR04	06APR04	30MAR04	08APR04	2
Prepare	8	8	02APR04	14APR04	05APR04	15APR04	1
Implement	16	18	15APR04	06MAY04	16APR04	07MAY04	1

Note that the procedure computes the backward pass of the schedule starting from the *project finish date*. Thus, the critical path is computed in the context of the entire project. If you want to obtain individual critical paths for each subproject, use the SEPCRIT option on the PROJECT statement. You can see the effect of this option in [Output 2.23.7](#): all the subprojects have T_FLOAT = '0'.

Output 2.23.7. Summary Schedule: FBDATE and SEPCRIT Options

Market Survey							
Summary Schedule: FBDATE and SEPCRIT Options							
activity	PROJ_DUR	duration	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT
Plan	7	6	29MAR04	06APR04	29MAR04	06APR04	0
Prepare	8	8	02APR04	14APR04	02APR04	14APR04	0
Implement	16	18	15APR04	06MAY04	15APR04	06MAY04	0

Now, suppose that, in addition to imposing a FINISHBEFORE constraint on the entire project, the project manager for each subproject specifies a desired duration for his or her subproject. In the present example, the variable `duration` has values ‘6’, ‘8’, and ‘18’ for the three subprojects. Note that by default these values are not used in either the backward or forward pass, even though they may represent desired durations for the corresponding subprojects. You can specify the USEPROJDUR option on the PROJECT statement to indicate that the procedure should use these specified durations to determine the late finish schedule for each of the subprojects. In other words, if the USEPROJDUR option is specified, the late finish for each subproject is constrained to be less than or equal to

$$E_START + \text{duration}$$

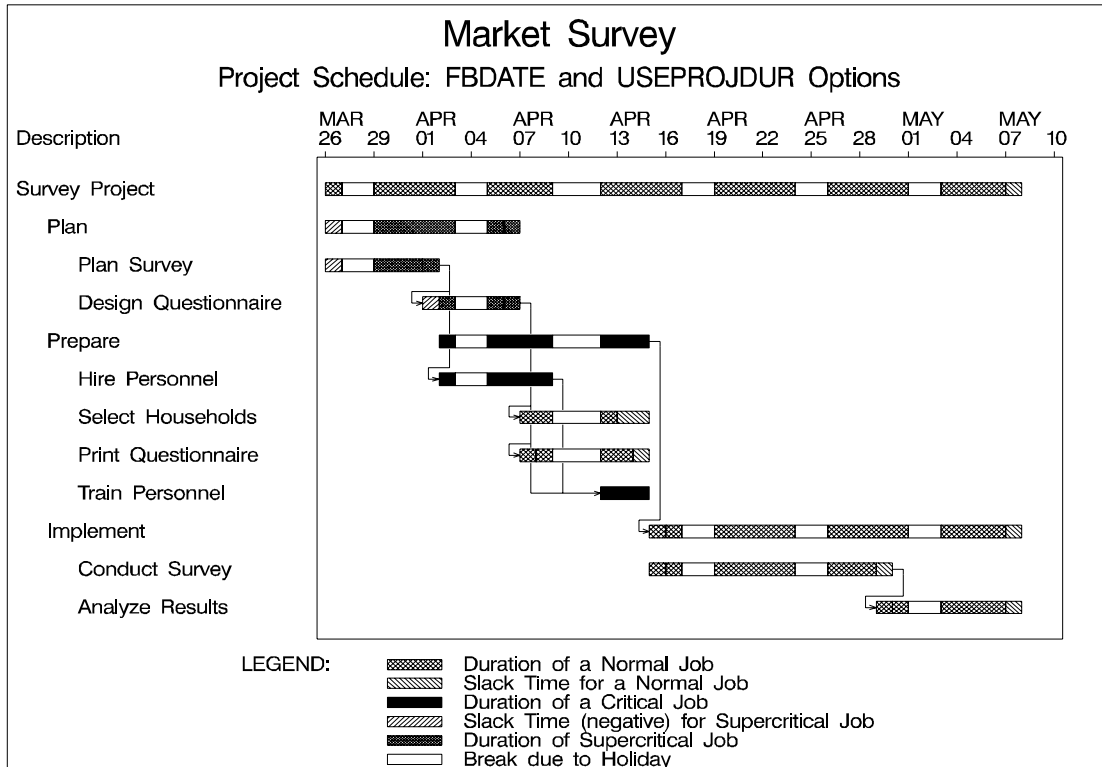
and this value is used during the backward pass.

The summary schedule resulting from the use of the USEPROJDUR option is shown in [Output 2.23.8](#). Note the difference in the schedules in [Output 2.23.7](#) and [Output 2.23.8](#). In [Output 2.23.7](#), the *computed project duration*, PROJ_DUR, is used to set an upper bound on the late finish time of each subproject, while in [Output 2.23.8](#), the *specified project duration* is used for the same purpose. Here, only the summary schedules are displayed; the effect of the two options on the subtasks within each subproject can be seen by displaying the entire schedule in each case. A Gantt chart of the entire project is displayed in [Output 2.23.9](#).

Output 2.23.8. Summary Schedule: FBDATE and USEPROJDUR Options

Market Survey							
Summary Schedule: FBDATE and USEPROJDUR Options							
activity	PROJ_DUR	duration	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT
Plan	7	6	29MAR04	06APR04	26MAR04	05APR04	-1
Prepare	8	8	02APR04	14APR04	02APR04	14APR04	0
Implement	16	18	15APR04	06MAY04	16APR04	07MAY04	1

Output 2.23.9. Gantt Chart of Schedule



The project schedule is further affected by the presence of any alignment dates on the individual activities or subprojects. For example, if the implementation phase of the project has a deadline of May 5, 2004, you can specify an alignment date and type variable with the appropriate values for the subproject 'Implement', as follows, and invoke PROC CPM with the ALIGNDATE and ALIGNTYPE statements, to obtain the new schedule, displayed in [Output 2.23.10](#).

```

data survey2;
  format aldate date7.;
  set survey;
  if activity="Implement" then do;
    altype="fle";
    aldate=' 5may04' d;
  end;
run;

proc cpm data=survey2 date=' 29mar04' d out=survout5
  interval=weekday holidata=holidata
  fbdate=' 10jun04' d;
  activity activity;
  successor succ1-succ3;
  duration duration;
  id id;
  holiday hol;
  project project / orderall addwbs sepccrit useprojdur;
  aligntype altype;

```

```

aligndate  adate;
run;

title 'Market Survey';
title2 'USEPROJDUR option and Alignment date';
proc print;
  where proj_lev=1;
  id activity;
  var proj_dur duration e_start--t_float;
run;

```

Output 2.23.10. USEPROJDUR option and Alignment Date

Market Survey							
Summary Schedule: USEPROJDUR option and Alignment date							
activity	PROJ_DUR	duration	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT
Plan	7	6	29MAR04	06APR04	26MAR04	05APR04	-1
Prepare	8	8	02APR04	14APR04	01APR04	13APR04	-1
Implement	16	18	15APR04	06MAY04	14APR04	05MAY04	-1

Example 2.24. Resource-Driven Durations and Resource Calendars

This example illustrates the effect of resource-driven durations and resource calendars on the schedule of a project involving multiple resources.

In projects that use manpower as a resource, the same activity may require different amounts of work from different people. Also, the work schedules and vacations may differ for each individual person. All of these factors may cause the schedules for the different resources used by the activity to differ from each other.

Consider a software project requiring two resources: a programmer and a tester. A network diagram displaying the activities and their precedence relationships is shown in [Figure 2.8](#).

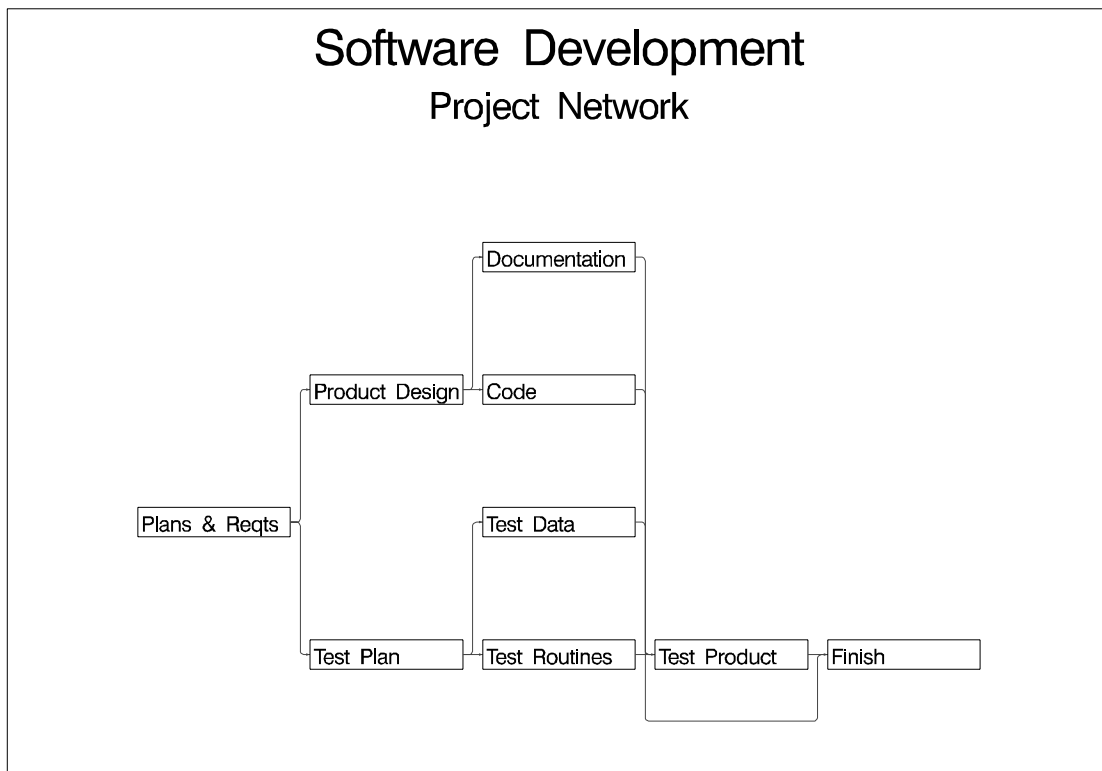


Figure 2.8. Software Project Network

Some of the activities in this project have a fixed duration, requiring the same length of time from both resources; others require a different number of days from the programmer and the tester. Further, some activities require only a fraction of the resource; for example, 'Documentation' requires only 20 percent of the programmer's time for a total of two man-days. The activities in the project, their durations (if fixed) in days, the total work required (if resource-driven) in days, the precedence constraints, and the resource requirements are displayed in [Output 2.24.1](#). Note that there are two observations for some of the activities ('Product Design' and 'Documentation') which require different amounts of work from each resource.

Output 2.24.1. Project Data

Software Development Activity Data Set SOFTWARE							
Activity	act	s1	s2	dur	mandays	Programmer	Tester
Plans & Reqts	1	2	3	2	.	1.0	1.0
Product Design	2	4	5	.	3	1.0	.
Product Design	2	.	.	.	1	.	1.0
Test Plan	3	6	7	3	.	.	1.0
Documentation	4	9	.	.	2	0.2	.
Documentation	4	.	.	.	1	.	0.5
Code	5	8	.	10	.	0.8	.
Test Data	6	8	.	5	.	.	0.5
Test Routines	7	8	.	5	.	.	0.5
Test Product	8	9	.	6	.	0.5	1.0
Finish	9	.	.	0	.	.	.

The following statements invoke PROC CPM with a WORK= specification on the RESOURCE statement, which identifies (in number of man-days, in this case) the amount of work required from each resource used by an activity. If the WORK variable has a missing value, the activity in that observation is assumed to have a fixed duration. The project is scheduled to start on April 12, 2004, and the activities are assumed to follow a five-day work week. Unlike fixed-duration scheduling, each resource used by an activity could have a different schedule; an activity is assumed to be finished only when all of its resources have finished working on it.

```
proc cpm data=software out=sftout ressched=rsftout
      date='12apr04'd interval=weekday resout=rout;
  act act;
  succ s1 s2;
  dur dur;
  res Programmer Tester / work=mandays
      rschedid=Activity;
  id Activity;
run;
```

The individual resource schedules, as well as each activity's combined schedule, are saved in a Resource Schedule data set, RSFTOUT, requested by the RESSCHED= option on the CPM statement. This output data set (displayed in [Output 2.24.2](#)) is very similar to the Schedule data set and contains the activity variable and all the relevant schedule variables (E_START, E_FINISH, L_START, and so forth).

Output 2.24.2. Resource Schedule Data Set

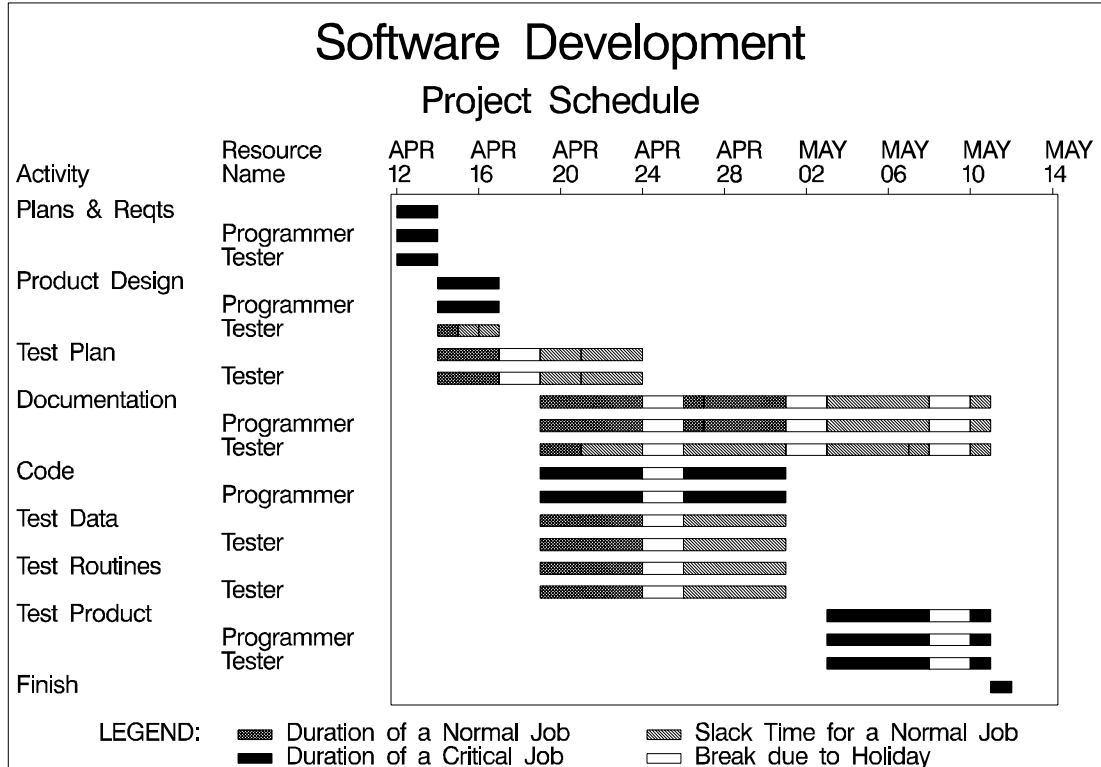
Software Development								
Resource Schedule Data Set RSFTOUT								
A	R	D		E		L		
c	E	U	m	E	—	L	—	
t	S	R	a R	—	F	—	F	
i	O	—	n —	S	I	S	I	
v	U	T	d R	T	N	T	N	
i	a R	Y	d a A	A	I	A	I	
t	c C	P	u y T	R	S	R	S	
y	t E	E	r s E	T	H	T	H	
Plans & Reqts	1		2 . .	12APR04	13APR04	12APR04	13APR04	
Plans & Reqts	1	Programmer	FIXED	2 . 1.0	12APR04	13APR04	12APR04	13APR04
Plans & Reqts	1	Tester	FIXED	2 . 1.0	12APR04	13APR04	12APR04	13APR04
Product Design	2		3 . .	14APR04	16APR04	14APR04	16APR04	
Product Design	2	Programmer	RDRIVEN	3 3 1.0	14APR04	16APR04	14APR04	16APR04
Product Design	2	Tester	RDRIVEN	1 1 1.0	14APR04	14APR04	16APR04	16APR04
Test Plan	3		3 . .	14APR04	16APR04	21APR04	23APR04	
Test Plan	3	Tester	FIXED	3 . 1.0	14APR04	16APR04	21APR04	23APR04
Documentation	4		10 . .	19APR04	30APR04	27APR04	10MAY04	
Documentation	4	Programmer	RDRIVEN	10 2 0.2	19APR04	30APR04	27APR04	10MAY04
Documentation	4	Tester	RDRIVEN	2 1 0.5	19APR04	20APR04	07MAY04	10MAY04
Code	5		10 . .	19APR04	30APR04	19APR04	30APR04	
Code	5	Programmer	FIXED	10 . 0.8	19APR04	30APR04	19APR04	30APR04
Test Data	6		5 . .	19APR04	23APR04	26APR04	30APR04	
Test Data	6	Tester	FIXED	5 . 0.5	19APR04	23APR04	26APR04	30APR04
Test Routines	7		5 . .	19APR04	23APR04	26APR04	30APR04	
Test Routines	7	Tester	FIXED	5 . 0.5	19APR04	23APR04	26APR04	30APR04
Test Product	8		6 . .	03MAY04	10MAY04	03MAY04	10MAY04	
Test Product	8	Programmer	FIXED	6 . 0.5	03MAY04	10MAY04	03MAY04	10MAY04
Test Product	8	Tester	FIXED	6 . 1.0	03MAY04	10MAY04	03MAY04	10MAY04
Finish	9		0 . .	11MAY04	11MAY04	11MAY04	11MAY04	

For each activity in the project, the Resource Schedule data set contains the schedule for the entire activity as well as the schedule for each resource used by the activity. The variable RESOURCE identifies the name of the resource to which the observation refers and has missing values for observations that refer to the entire activity's schedule. The value of the variable DUR_TYPE indicates whether the resource drives the activity's duration ('RDRIVEN') or not ('FIXED').

The DURATION variable, dur, indicates the duration of the activity for the resource identified in that observation. For resources that are of the driving type, the WORK variable, mandays, shows the total amount of work (in units of the INTERVAL parameter) required by the resource for the activity in that observation. The variable R_RATE shows the rate of usage of the resource for the relevant activity. Note that for driving resources, the variable dur is computed as (mandays / R_RATE). Thus, for the Activity, 'Documentation', the programmer requires 10 days to complete 2 man-days of work at a rate of 20 percent per day, while the tester works at a rate of 50 percent requiring 2 days to complete 1 man-day of work.

A Gantt chart of the schedules for each resource is plotted in [Output 2.24.3](#).

Output 2.24.3. Software Project Schedule



The daily utilization of the resources is also saved in a data set, ROUT, displayed in [Output 2.24.4](#). The resource usage data set indicates that you need more than one tester on some days with both the early schedule (on the 14th, 19th, and 20th of April) and the late schedule (on the 7th and 10th of May).

Output 2.24.4. Resource Usage Data

Software Development Resource Usage Data Set ROUT					
Obs	_TIME_	EProgrammer	LProgrammer	ETester	LTester
1	12APR04	1.0	1.0	1.0	1.0
2	13APR04	1.0	1.0	1.0	1.0
3	14APR04	1.0	1.0	2.0	0.0
4	15APR04	1.0	1.0	1.0	0.0
5	16APR04	1.0	1.0	1.0	1.0
6	19APR04	1.0	0.8	1.5	0.0
7	20APR04	1.0	0.8	1.5	0.0
8	21APR04	1.0	0.8	1.0	1.0
9	22APR04	1.0	0.8	1.0	1.0
10	23APR04	1.0	0.8	1.0	1.0
11	26APR04	1.0	0.8	0.0	1.0
12	27APR04	1.0	1.0	0.0	1.0
13	28APR04	1.0	1.0	0.0	1.0
14	29APR04	1.0	1.0	0.0	1.0
15	30APR04	1.0	1.0	0.0	1.0
16	03MAY04	0.5	0.7	1.0	1.0
17	04MAY04	0.5	0.7	1.0	1.0
18	05MAY04	0.5	0.7	1.0	1.0
19	06MAY04	0.5	0.7	1.0	1.0
20	07MAY04	0.5	0.7	1.0	1.5
21	10MAY04	0.5	0.7	1.0	1.5
22	11MAY04	0.0	0.0	0.0	0.0

Suppose now that you have only one tester and one programmer. You can determine a resource-constrained schedule using PROC CPM (as in the fixed duration case) by specifying a resource availability data set, RESIN ([Output 2.24.5](#)).

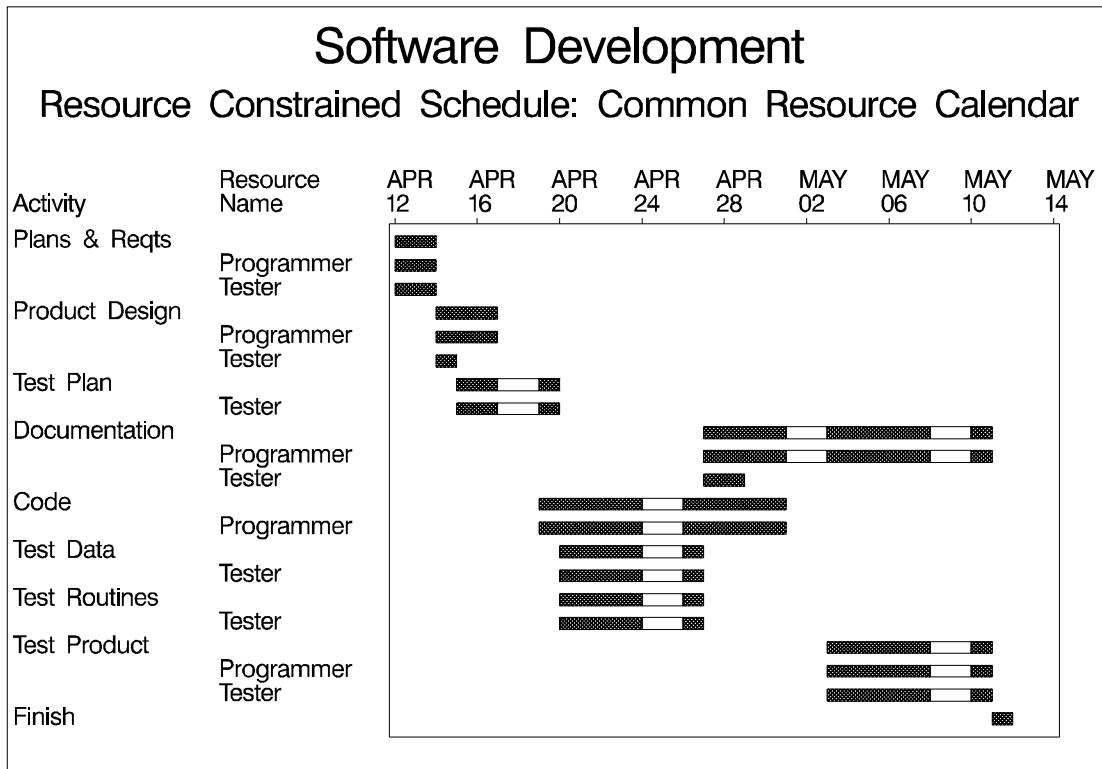
Output 2.24.5. Resource Availability Data

Software Development Resource Availability Data Set				
Obs	per	otype	Programmer	Tester
1	12APR04	reslevel	1	1

The following statements invoke PROC CPM, and the resulting Resource Schedule data set is displayed in [Output 2.24.6](#). The ADDCAL option on the RESOURCE statement creates a variable in the Resource Schedule data set which identifies the activity or resource calendar. Note that the project still finishes on May 11, but some of the activities ('Test Plan', 'Documentation', 'Test Data', and 'Test Routines') are delayed. The resource-constrained schedule is plotted on a Gantt chart in [Output 2.24.7](#); both resources follow the same weekday calendar.

```
proc cpm data=software resin=resin
  out=sftout1 resout=rout1
  rsched=rsftout1
  date='12apr04'd interval=weekday;
act act;
succ s1 s2;
```


Output 2.24.7. Resource-Constrained Schedule



Now suppose that the tester switches to part-time employment, working only four days a week. Thus, the two resources have different calendars. To determine the effect this change has on the project schedule, define a calendar data set identifying calendar '1' as having a holiday on Friday (see [Output 2.24.8](#)). In a new resource availability data set (also displayed in [Output 2.24.8](#)), associate calendar '1' with the resource Tester and calendar '0' with the resource Programmer. Note that '0' refers to the default calendar, which is the weekday calendar for this project (since INTERVAL = WEEKDAY).

Output 2.24.8. Resource and Calendar Data

```

Software Development
Calendar Data Set CALENDAR

Obs   _cal_   _fri_
1     1     holiday

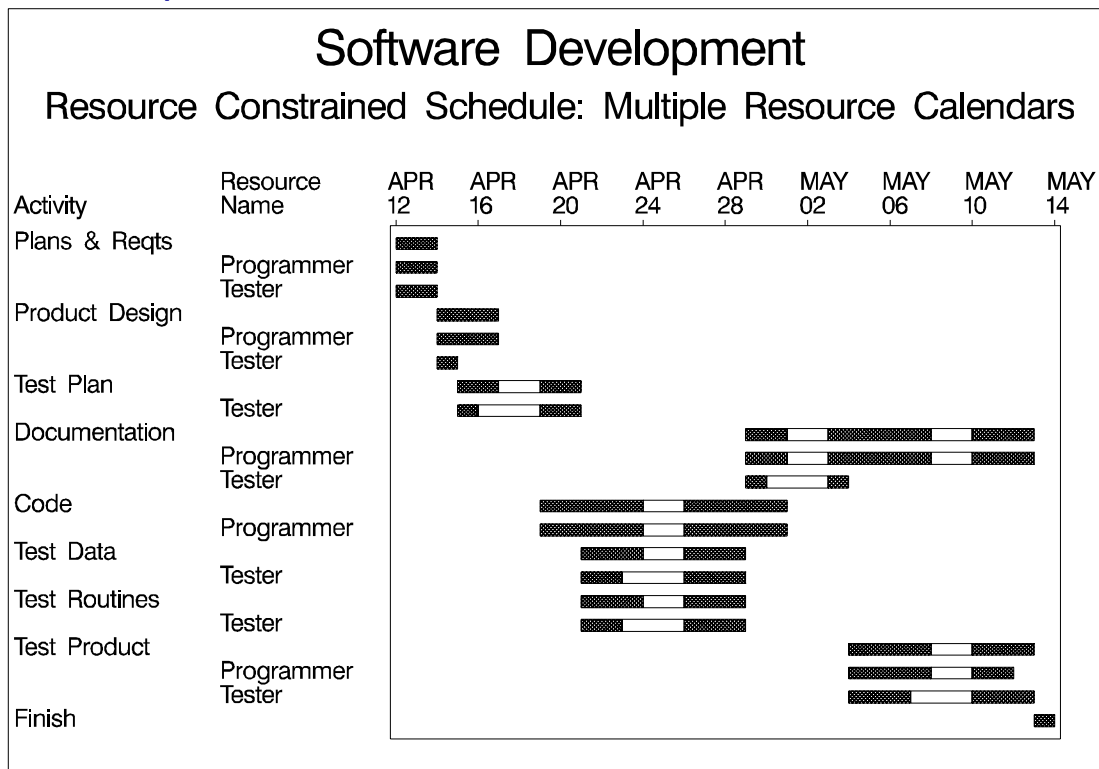
Resource Data Set RESIN2

Obs   per   otype   Programmer   Tester
1     .    calendar   0             1
2    12APR04  reslevel   1             1
    
```

Next, invoke PROC CPM, as shown in the following statements, with the Activity, Resource, and Calendar data sets to obtain the revised schedule, plotted in [Output 2.24.9](#). Note that the project is delayed by two days because of the TESTER's shorter work week, which is illustrated by the longer holiday breaks in the TESTER's schedule bars. The new resource constrained schedule is displayed in [Output 2.24.10](#).

```
proc cpm data=software resin=resin2
      caledata=calendar
      out=sftout2 rsched=rsftout2
      resout=rout2
      date='12apr04'd interval=weekday;
act act;
succ s1 s2;
dur dur;
res Programmer Tester / work=mandays addcal
                        obstype=otype
                        period=per
                        rschedid=Activity;
id Activity;
run;
```

Output 2.24.9. Resource-Constrained Schedule



Output 2.24.10. Resource-Constrained Schedule: Multiple Calendars

Software Development								
Resource Constrained Schedule: Multiple Resource Calendars								
Activity	act	_CAL_	RESOURCE	DUR_TYPE	dur	mandays	R_RATE	S_START
Plans & Reqts	1	0			2	.	.	12APR04
Plans & Reqts	1	0	Programmer	FIXED	2	.	1.0	12APR04
Plans & Reqts	1	1	Tester	FIXED	2	.	1.0	12APR04
Product Design	2	0			3	.	.	14APR04
Product Design	2	0	Programmer	RDRIVEN	3	3	1.0	14APR04
Product Design	2	1	Tester	RDRIVEN	1	1	1.0	14APR04
Test Plan	3	0			3	.	.	15APR04
Test Plan	3	1	Tester	FIXED	3	.	1.0	15APR04
Documentation	4	0			10	.	.	29APR04
Documentation	4	0	Programmer	RDRIVEN	10	2	0.2	29APR04
Documentation	4	1	Tester	RDRIVEN	2	1	0.5	29APR04
Code	5	0			10	.	.	19APR04
Code	5	0	Programmer	FIXED	10	.	0.8	19APR04
Test Data	6	0			5	.	.	21APR04
Test Data	6	1	Tester	FIXED	5	.	0.5	21APR04
Test Routines	7	0			5	.	.	21APR04
Test Routines	7	1	Tester	FIXED	5	.	0.5	21APR04
Test Product	8	0			6	.	.	04MAY04
Test Product	8	0	Programmer	FIXED	6	.	0.5	04MAY04
Test Product	8	1	Tester	FIXED	6	.	1.0	04MAY04
Finish	9	0			0	.	.	13MAY04

Activity	S_FINISH	E_START	E_FINISH	L_START	L_FINISH
Plans & Reqts	13APR04	12APR04	13APR04	12APR04	13APR04
Plans & Reqts	13APR04	12APR04	13APR04	12APR04	13APR04
Plans & Reqts	13APR04	12APR04	13APR04	12APR04	13APR04
Product Design	16APR04	14APR04	16APR04	14APR04	16APR04
Product Design	16APR04	14APR04	16APR04	14APR04	16APR04
Product Design	14APR04	14APR04	14APR04	15APR04	15APR04
Test Plan	20APR04	14APR04	19APR04	19APR04	21APR04
Test Plan	20APR04	14APR04	19APR04	19APR04	21APR04
Documentation	12MAY04	19APR04	30APR04	28APR04	11MAY04
Documentation	12MAY04	19APR04	30APR04	28APR04	11MAY04
Documentation	03MAY04	19APR04	20APR04	10MAY04	11MAY04
Code	30APR04	19APR04	30APR04	19APR04	30APR04
Code	30APR04	19APR04	30APR04	19APR04	30APR04
Test Data	28APR04	20APR04	27APR04	22APR04	30APR04
Test Data	28APR04	20APR04	27APR04	22APR04	29APR04
Test Routines	28APR04	20APR04	27APR04	22APR04	30APR04
Test Routines	28APR04	20APR04	27APR04	22APR04	29APR04
Test Product	12MAY04	03MAY04	11MAY04	03MAY04	11MAY04
Test Product	11MAY04	03MAY04	10MAY04	04MAY04	11MAY04
Test Product	12MAY04	03MAY04	11MAY04	03MAY04	11MAY04
Finish	13MAY04	12MAY04	12MAY04	12MAY04	12MAY04

Example 2.25. Resource-Driven Durations and Alternate Resources

Consider the software project defined in [Example 2.24](#) but now the project requires a single resource: a programmer. A network diagram displaying the activities and their precedence relationships is shown in [Figure 2.8](#), as part of the same example.

Some of the activities in this project have a fixed duration, requiring a fixed length of time from a programmer. Other activities specify the amount of work required in terms of man-days; for these activities, the length of the task will depend on the num-

ber of programmers (or rate) that is assigned to the task. The activities in the project, their durations (if fixed) or the total work required (if resource-driven) in days, the precedence constraints, and the resource requirements are displayed in [Output 2.25.1](#).

Suppose that you have only one programmer assigned to the project. You can determine a resource-constrained schedule using PROC CPM by specifying a resource availability data set, `resin` (also in [Output 2.25.1](#)). Note that the Resource data set indicates that the resource `Programmer` is a driving resource whenever the `WORK` variable has a valid value.

Output 2.25.1. Project Data

Software Development Activity Data Set SOFTWARE						
Activity	act	s1	s2	dur	mandays	Programmer
Plans & Reqts	1	2	3	2	.	1
Product Design	2	4	5	.	3	1
Test Plan	3	6	7	3	.	.
Documentation	4	9	.	1	2	1
Code	5	8	.	1	10	1
Test Data	6	8	.	5	.	.
Test Routines	7	8	.	5	.	.
Test Product	8	9	.	6	.	1
Finish	9	.	.	0	.	.

Software Development Resource Availability Data Set			
Obs	per	otype	Programmer
1	.	resrcdur	1
2	12APR04	reslevel	1

The following statements invoke PROC CPM with a `WORK=` specification on the `RESOURCE` statement, which identifies (in number of man-days, in this case) the amount of work required from the resource `Programmer` for each activity. If the `WORK` variable has a missing value, the activity in that observation is assumed to have a fixed duration. The project is scheduled to start on April 12, 2004, and the activities are assumed to follow a five-day work week. The resulting schedule is displayed in [Output 2.25.2](#). For each activity in the project, the value of the variable `DUR_TYPE` indicates whether the resource drives the activity's duration ('RDRIVEN') or not ('FIXED').

```
proc cpm data=software
  out=sftout1 resout=rout1
  rsched=rsftout1
  resin=resin
  date='12apr04'd interval=weekday;
act act;
succ s1 s2;
dur dur;
res Programmer / work=mandays
```

```

                                obstype=otype
                                period=per
                                rschedid=Activity;
    id Activity;
    run;

    title 'Software Development';
    title2 'Resource Constrained Schedule: Single Programmer';
    proc print data=rsftout1;
        id Activity;
    run;

```

Output 2.25.2. Resource Schedule

Software Development							
Resource Constrained Schedule: Single Programmer							
Activity	act	RESOURCE	DUR_TYPE	dur	mandays	R_RATE	S_START
Plans & Reqts	1			2	.	.	12APR04
Plans & Reqts	1	Programmer	FIXED	2	.	1	12APR04
Product Design	2			3	.	.	14APR04
Product Design	2	Programmer	RDRIVEN	3	3	1	14APR04
Test Plan	3			3	.	.	14APR04
Documentation	4			1	.	.	11MAY04
Documentation	4	Programmer	RDRIVEN	2	2	1	11MAY04
Code	5			1	.	.	19APR04
Code	5	Programmer	RDRIVEN	10	10	1	19APR04
Test Data	6			5	.	.	19APR04
Test Routines	7			5	.	.	19APR04
Test Product	8			6	.	.	03MAY04
Test Product	8	Programmer	FIXED	6	.	1	03MAY04
Finish	9			0	.	.	13MAY04

Activity	S_FINISH	E_START	E_FINISH	L_START	L_FINISH
Plans & Reqts	13APR04	12APR04	13APR04	12APR04	13APR04
Plans & Reqts	13APR04	12APR04	13APR04	12APR04	13APR04
Product Design	16APR04	14APR04	16APR04	14APR04	16APR04
Product Design	16APR04	14APR04	16APR04	14APR04	16APR04
Test Plan	16APR04	14APR04	16APR04	21APR04	23APR04
Documentation	12MAY04	19APR04	20APR04	07MAY04	10MAY04
Documentation	12MAY04	19APR04	20APR04	07MAY04	10MAY04
Code	30APR04	19APR04	30APR04	19APR04	30APR04
Code	30APR04	19APR04	30APR04	19APR04	30APR04
Test Data	23APR04	19APR04	23APR04	26APR04	30APR04
Test Routines	23APR04	19APR04	23APR04	26APR04	30APR04
Test Product	10MAY04	03MAY04	10MAY04	03MAY04	10MAY04
Test Product	10MAY04	03MAY04	10MAY04	03MAY04	10MAY04
Finish	13MAY04	11MAY04	11MAY04	11MAY04	11MAY04

The following statements invoke PROC GANTT to display a Gantt chart of the schedule in [Output 2.25.3](#). Note that the activity, 'Documentation', is delayed until May 11, 2004, because there is only one programmer available to the project.

```

    title h=2 'Software Development';
    title2 h=1.5 'Resource Constrained Schedule: Single Programmer';
    proc gantt graphics data=sftout1;

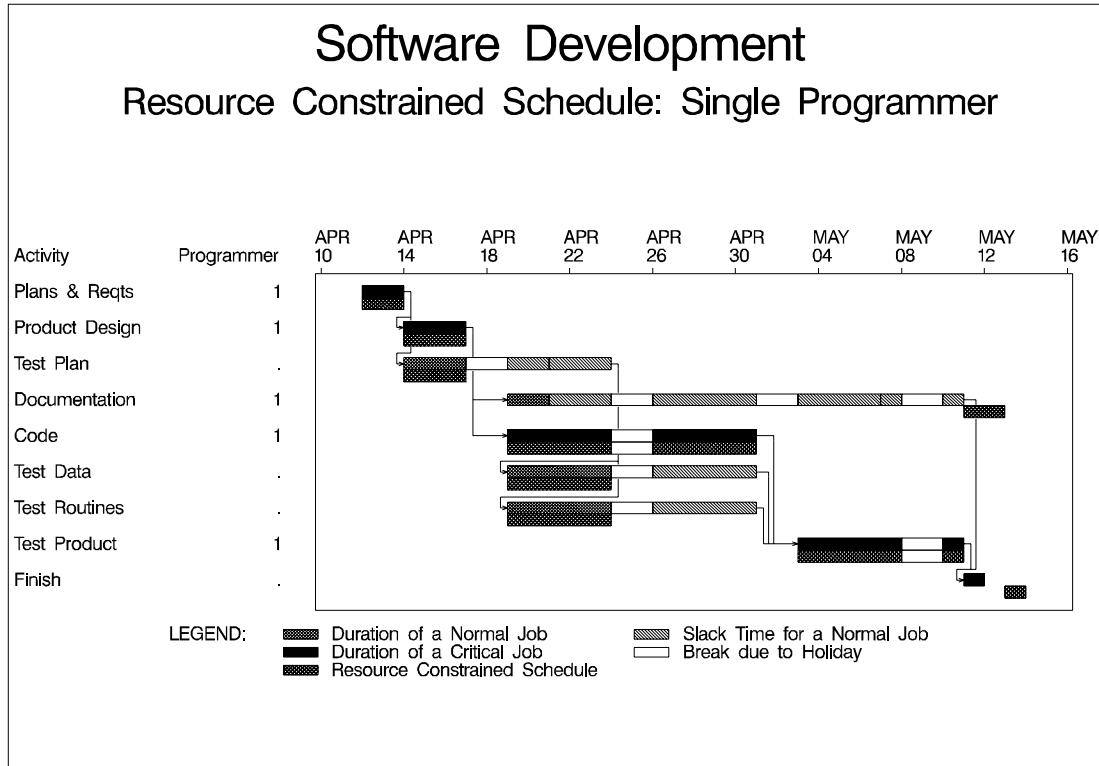
```

```

id Activity Programmer;
chart / pcompress scale=3 increment=4 interval=weekday
      height=2.5 nojobnum nolegend between=5
      act=act succ=(s1 s2)
      ;
run;

```

Output 2.25.3. Resource-Constrained Schedule: Single Programmer



Next, suppose that you have two programmers assigned to your project and you can use either one of them for a given task, depending on their availability. To model this scenario, specify Chris and John as alternate resources that can be substituted for the resource Programmer. The Resource data set, `resin2`, printed in [Output 2.25.4](#), indicates that Chris and John are alternates for Programmer. Specifying an availability of '0' for the resource Programmer ensures that the procedure will assign one of the two programmers, Chris or John, to each task.

The second observation in the data set `resin2` indicates two different rates of substitution for the alternate resources. A value less than 1 indicates that the alternate resource is more efficient than the primary resource, while a value greater than 1 indicates that the alternate resource is less efficient. For fixed-duration activities, the use of the alternate resource changes the *rate* of utilization of the resource, while for a resource-driven activity, it changes the *duration* of the resource. The data set `resin` specifies that John is twice as efficient as the primary resource Programmer while Chris takes one and a half times as long as the generic resource to accomplish a task.

Output 2.25.4. Alternate Programmers

Resource Data Set RESIN2						
Obs	per	otype	resid	Programmer	Chris	John
1	.	resrcdur		1	1.0	1.0
2	.	altrate	Programmer	.	1.5	0.5
3	12APR04	reslevel		.	1.0	1.0

The following statements invoke PROC CPM with the new Resource data set and a modified Activity data set that includes the newly added resource variables, **Chris** and **John**. You can see the effects of the alternate resource specifications in the Resource Schedule data set, printed in [Output 2.25.5](#). Note that the activity ‘Product Design’ that takes 3 days of time from a generic programmer actually takes 4.5 days because the programmer used is Chris, who is substituted at a rate of 1.5. On the other hand, the programmer John efficiently completes the task, ‘Documentation’, in only 1 day, instead of the planned 2 days for a generic programmer. Note also that the start and finish times are specified as SAS datetime values because the substitution of alternate resources results in some of the resource durations being fractional.

```

data software2;
  set software;
  Chris = .;
  John = .;
run;

proc cpm data=software2 out=sftout2 rsched=rsftout2
  resin=resin2
  date='12apr04'd interval=weekday resout=rout2;
  act act;
  succ s1 s2;
  dur dur;
  res Programmer Chris John / work=mandays
  obstype=otype
  period=per
  resid=resid
  rschedid=Activity;

  id Activity;
run;

```

Output 2.25.5. Resource Schedule with Alternate Programmers

Software Development							
Resource Constrained Schedule							
Alternate Resources at Varying Rates							
Activity	act	RESOURCE	DUR_TYPE	dur	mandays	R_RATE	S_START
Plans & Reqts	1			2.0	.	.	12APR04:00:00:00
Plans & Reqts	1	Programmer	FIXED	2.0	.	1.0	.
Plans & Reqts	1	John	FIXED	2.0	.	0.5	12APR04:00:00:00
Product Design	2			3.0	.	.	14APR04:00:00:00
Product Design	2	Programmer	RDRIVEN	3.0	3.0	1.0	.
Product Design	2	Chris	RDRIVEN	4.5	4.5	1.0	14APR04:00:00:00
Test Plan	3			3.0	.	.	14APR04:00:00:00
Documentation	4			1.0	.	.	20APR04:12:00:00
Documentation	4	Programmer	RDRIVEN	2.0	2.0	1.0	.
Documentation	4	John	RDRIVEN	1.0	1.0	1.0	20APR04:12:00:00
Code	5			1.0	.	.	20APR04:12:00:00
Code	5	Programmer	RDRIVEN	10.0	10.0	1.0	.
Code	5	Chris	RDRIVEN	15.0	15.0	1.0	20APR04:12:00:00
Test Data	6			5.0	.	.	19APR04:00:00:00
Test Routines	7			5.0	.	.	19APR04:00:00:00
Test Product	8			6.0	.	.	11MAY04:12:00:00
Test Product	8	Programmer	FIXED	6.0	.	1.0	.
Test Product	8	John	FIXED	6.0	.	0.5	11MAY04:12:00:00
Finish	9			0.0	.	.	19MAY04:12:00:00

Activity	S_FINISH	E_START	E_FINISH
Plans & Reqts	13APR04:23:59:59	12APR04:00:00:00	13APR04:23:59:59
Plans & Reqts	.	12APR04:00:00:00	13APR04:23:59:59
Plans & Reqts	13APR04:23:59:59	.	.
Product Design	20APR04:11:59:59	14APR04:00:00:00	16APR04:23:59:59
Product Design	.	14APR04:00:00:00	16APR04:23:59:59
Product Design	20APR04:11:59:59	.	.
Test Plan	16APR04:23:59:59	14APR04:00:00:00	16APR04:23:59:59
Documentation	21APR04:11:59:59	19APR04:00:00:00	20APR04:23:59:59
Documentation	.	19APR04:00:00:00	20APR04:23:59:59
Documentation	21APR04:11:59:59	.	.
Code	11MAY04:11:59:59	19APR04:00:00:00	30APR04:23:59:59
Code	.	19APR04:00:00:00	30APR04:23:59:59
Code	11MAY04:11:59:59	.	.
Test Data	23APR04:23:59:59	19APR04:00:00:00	23APR04:23:59:59
Test Routines	23APR04:23:59:59	19APR04:00:00:00	23APR04:23:59:59
Test Product	19MAY04:11:59:59	03MAY04:00:00:00	10MAY04:23:59:59
Test Product	.	03MAY04:00:00:00	10MAY04:23:59:59
Test Product	19MAY04:11:59:59	.	.
Finish	19MAY04:12:00:00	11MAY04:00:00:00	11MAY04:00:00:00

Example 2.26. Multiple Alternate Resources

Output 2.26.1. Multiple Alternates

Software Development Use of Multiple Alternate Resources Activity Data Set									
Obs	Activity	dur	mandays	act	s1	s2	Programmer	Chris	John
1	Plans & Reqts	2	.	1	2	3	2	.	.
2	Product Design	.	3	2	4	5	1	.	.
3	Test Plan	3	.	3	6	7	.	.	.
4	Documentation	1	2	4	9	.	1	.	.
5	Code	1	10	5	8	.	1	.	.
6	Test Data	5	.	6	8	.	.	.	.
7	Test Routines	5	.	7	8	.	.	.	.
8	Test Product	6	.	8	9	.	1	.	.
9	Finish	0	.	9	.	.	.	.	.

Software Development Use of Multiple Alternate Resources Resource Data Set						
Obs	per	otype	resid	Programmer	Chris	John
1	.	resrcdur		1	1	1
2	.	altrate	Programmer	.	1	1
3	12APR04	reslevel		.	1	1

This example illustrates the use of the MULTIPLEALTERNATES option. The Activity data set printed in [Output 2.26.1](#) is a slightly modified version of the data set in [Example 2.25](#). The difference is in the resource requirement for the first activity in the project. The ‘Plans and Requirements’ task requires 2 programmers. By default, when alternate resources are used, the CPM procedures cannot use multiple alternate resources to substitute for any given resource. In this example, however, you would like the procedure to use both Chris and John for the first task. The Resource data set resmult is also printed in [Output 2.26.1](#), showing that both Chris and John are alternates that can be substituted at the same rate as the primary resource.

To enable PROC CPM to use multiple alternates, use the MULTIPLEALTERNATES option, as shown in the following invocation:

```
proc cpm data=softmult out=sftmult rsched=rsftmult
      resin=resmult
      date='12apr04'd interval=weekday resout=routmult;
act act;
succ s1 s2;
dur dur;
res Programmer Chris John / work=mandays
      obstype=otype
      period=per resid=resid
      multiplealternates
```


Example 2.27. Auxiliary Resources and Alternate Resources

This example illustrates the use of Auxiliary resources. In the earlier examples, the use of alternate resources enabled the allocation of either John or Chris to the programming tasks. Now, suppose that each of the programmers has a different tester, and whenever a particular programmer is scheduled for a given task, his tester also needs to allocate some part of his or her time, say 50 percent, to the same task. To model such a scenario, specify `Tester1` and `Tester2` as auxiliary resources for Chris and John, respectively. The Activity and Resource data sets are printed in [Output 2.27.1](#). Unlike the earlier examples, all the activities are of fixed-duration.

Output 2.27.1. Auxiliary Resources: Input Data Sets

Software Development Alternate and Auxiliary Resources Activity Data Set										
Obs	Activity	dur	act	s1	s2	Programmer	Chris	John	Tester1	Tester2
1	Plans & Reqts	2	1	2	3	1	.	.	.	.
2	Product Design	3	2	4	5	1	.	.	.	.
3	Test Plan	3	3	6	7	.	.	.	.	.
4	Documentation	3	4	9	.	1	.	.	.	.
5	Code	10	5	8	.	1	.	.	.	.
6	Test Data	5	6	8	.	.	.	.	.	.
7	Test Routines	5	7	8	.	.	.	.	.	.
8	Test Product	6	8	9	.	1	.	.	.	.
9	Finish	0	9	.	.	.	.	.	.	.

Software Development Alternate and Auxiliary Resources Resource Data Set									
Obs	per	otype	resid	Programmer	Chris	John	Tester1	Tester2	
1	.	altrate	Programmer	.	1	1	.	.	
2	.	auxres	Chris	.	.	.	0.5	.	
3	.	auxres	John	.	.	.	.	0.5	
4	12APR04	reslevel		.	1	1	1.0	1.0	

The following statements invoke PROC CPM with the appropriate data sets and resource variables. The resulting schedule is printed in [Output 2.27.2](#). Note the auxiliary resources that have been included in the schedule corresponding to each primary resource: Tester1 whenever Chris is used, and Tester2 whenever John is allocated.

```
proc cpm data=softaux out=sftaux rsched=rsftaux resin=resaux
      date='12apr04'd interval=weekday resout=raux;
  act act;
  succ s1 s2;
  dur dur;
  res Programmer Chris John Tester1 Tester2 /
      obstype=otype
      period=per resid=resid
      multalt rschedid=Activity;
  id Activity;
run;
```


Example 2.28. Use of the SETFINISHMILESTONE Option

A simple activity network is used to illustrate the use of the SETFINISHMILESTONE option in a couple of different scenarios.

The following DATA step reads the project network in AON format into a SAS data set named `tasks`. The data set (printed in [Output 2.28.1](#)) contains an Activity variable (`act`), a Successor variable (`succ`), a Lag variable (`lag`), and a Duration variable (`dur`). Note that there are several milestones linked to other activities through different types of precedence constraints. The data set also contains some alignment constraints as specified by the variables `target` and `trgttype`. Note that the treatment of the milestones will vary depending on the presence or absence of the alignment constraints. The data set also contains two variables that indicate the expected early schedule dates for the milestones corresponding to two different invocations of PROC CPM: the variable `notrgtmd` corresponds to the non-aligned schedule and the variable `miledate` corresponds to an invocation with the `ALIGNDATE` statement (the values for these variables are explained later).

```

data tasks;
  format act $7. succ $7. lag $4. target date7.
         trgttype $3. miledate date7. notrgtmd date7. ;
  input act & succ & lag $ dur target & date7.
        trgttype $ miledate & date7. notrgtmd & date7. ;
  datalines;
Task 0   Mile 1   ss_0 1 26Jan04   SGE . .
Mile 1   Task 2   . 0 . . . 26Jan04 26Jan04
Task 2   . . . 1 . . . . .
Task 3   Mile 4   . 1 . . . . .
Mile 4   . . . 0 . . . 26Jan04 26Jan04
Task 5   Mile 6   . 1 . . . . .
Mile 6   Mile 7   FS_1 0 . . . 26Jan04 26Jan04
Mile 7   . . . 0 . . . 27Jan04 27Jan04
Task 8   Mile 9   SS_3 1 . . . . .
Mile 9   Mile 10  . 0 . . . 29Jan04 29Jan04
Mile 10  . . . 0 . . . 29Jan04 29Jan04
Task 11  Mile 12  . 2 . . . . .
Mile 12  Mile 13  FS_1 0 28Jan04   SGE 28Jan04 27Jan04
Mile 13  . . . 0 . . . 29Jan04 28Jan04
;

```

Output 2.28.1. Input Data Set

Input Data Set								
Obs	act	succ	lag	dur	target	trgttype	miledate	notrgtmd
1	Task 0	Mile 1	ss_0	1	26JAN04	SGE	.	.
2	Mile 1	Task 2		0	.		26JAN04	26JAN04
3	Task 2			1	.		.	.
4	Task 3	Mile 4		1	.		.	.
5	Mile 4			0	.		26JAN04	26JAN04
6	Task 5	Mile 6		1	.		.	.
7	Mile 6	Mile 7	FS_1	0	.		26JAN04	26JAN04
8	Mile 7			0	.		27JAN04	27JAN04
9	Task 8	Mile 9	SS_3	1	.		.	.
10	Mile 9	Mile 10		0	.		29JAN04	29JAN04
11	Mile 10			0	.		29JAN04	29JAN04
12	Task 11	Mile 12		2	.		.	.
13	Mile 12	Mile 13	FS_1	0	28JAN04	SGE	28JAN04	27JAN04
14	Mile 13			0	.		29JAN04	28JAN04

Output 2.28.2. Default Schedule

Default Schedule											
					n	E	L	L	T	F	
					o	E	—	L	—	T	
					t	—	F	—	F	—	
					r	S	I	S	I	F	
					g	T	N	T	N	L	
O	a	u	d	l	t	A	I	A	I	O	
b	c	c	u	a	m	R	S	R	S	A	
s	t	c	r	g	d	T	H	T	H	T	
1	Task 0	Mile 1	1	ss_0	.	26JAN04	26JAN04	28JAN04	28JAN04	2	0
2	Mile 1	Task 2	0		26JAN04	26JAN04	26JAN04	28JAN04	28JAN04	2	0
3	Task 2		1		.	26JAN04	26JAN04	28JAN04	28JAN04	2	2
4	Task 3	Mile 4	1		.	26JAN04	26JAN04	28JAN04	28JAN04	2	0
5	Mile 4		0		26JAN04	27JAN04	27JAN04	29JAN04	29JAN04	2	2
6	Task 5	Mile 6	1		.	26JAN04	26JAN04	27JAN04	27JAN04	1	0
7	Mile 6	Mile 7	0	FS_1	26JAN04	27JAN04	27JAN04	28JAN04	28JAN04	1	0
8	Mile 7		0		27JAN04	28JAN04	28JAN04	29JAN04	29JAN04	1	1
9	Task 8	Mile 9	1	SS_3	.	26JAN04	26JAN04	26JAN04	26JAN04	0	0
10	Mile 9	Mile 10	0		29JAN04	29JAN04	29JAN04	29JAN04	29JAN04	0	0
11	Mile 10		0		29JAN04	29JAN04	29JAN04	29JAN04	29JAN04	0	0
12	Task 11	Mile 12	2		.	26JAN04	27JAN04	26JAN04	27JAN04	0	0
13	Mile 12	Mile 13	0	FS_1	27JAN04	28JAN04	28JAN04	28JAN04	28JAN04	0	0
14	Mile 13		0		28JAN04	29JAN04	29JAN04	29JAN04	29JAN04	0	0

First, the CPM procedure is invoked with the default treatment of milestones. The resulting schedule is printed in [Output 2.28.2](#). Note the dates for the milestones. Compare these dates with the values of the early finish dates of the immediate predecessors.

The default behavior of the CPM procedure defines the start times for milestones to be at the beginning of the day after the predecessor task (with a standard FS_0 relationship) ends. Thus, for example, the activity, ‘Mile 4’ has E_START=27JAN04 because its predecessor, ‘Task 3’, has E_FINISH=26JAN04. The interpretation for these dates are that the early finish corresponds to the end of the day, while the early start of the milestone ‘Mile 4’ corresponds to the beginning of the day. However, in some situations you may want the milestone to be scheduled at the same time as the end of the predecessor activity. In other words, you may wish the early start time of the milestone ‘Mile 4’ to be displayed as 26JAN04, with the interpretation that this time actually denotes the end of the day, rather than the beginning. See the [“Finish Milestones”](#) section on page 94 for details about the treatment of milestones. In the

current example, the variable `notrgtmd` contains the desired milestone schedule dates corresponding to this special treatment of milestones. To obtain these desired dates, you must use the `SETFINISHMILESTONE` option.

```

/* Schedule the project */
proc cpm data=tasks out=out0
    collapse interval=day
    date='26jan04'd;
    activity act;
    successor succ /lag=(lag);
    duration dur;
    id lag notrgtmd;
run;

title 'Default Schedule';
proc print; run;

```

Next, the CPM procedure is invoked with the option `SETFINISHMILESTONE` and the resulting schedule is printed in [Output 2.28.3](#). Note that not all milestones are defined to denote the end of the displayed date; such milestones are referred to as finish milestone. The variables `EFINMILE` and `LFINMILE` indicate if the milestone is a finish milestone or not, corresponding the the early or late schedule, respectively. For example, the milestone 'Mile 12' has `E_FINISH = 27JAN04` and the value of `EFINMILE` is '1', indicating that the activity finishes at the end of the day on January 27, 2004. The milestone 'Mile 13' (with a finish-to-start lag of 1 day) finishes at the end of the day on January 28, 2004. In fact, as the late finish schedule indicates, the value of `L_FINISH` for 'Mile 13' (and the project finish time) is the end of the day on 28JAN04. Note that both the variables `EFINMILE` and `LFINMILE` have the same values for all the activities in this example.

```

proc cpm data=tasks out=out1
    collapse interval=day
    date='26jan04'd
    setfinishmilestone;
    activity act;
    successor succ /lag=(lag);
    duration dur;
    id lag notrgtmd;
run;

title 'Schedule with option SETFINISHMILESTONE';
title2 'No Target Dates';
proc print;
    id act;
    var succ lag dur notrgtmd e_start e_finish
        l_start l_finish efinmile lfinmile;
run;

```

Output 2.28.3. Schedule with SETFINISHMILESTONE Option

Schedule with option SETFINISHMILESTONE										
No Target Dates										
				n	E	E	L	L	E	L
				o	E	-	L	-	F	F
				t	-	F	-	F	I	I
				r	S	I	S	I	N	N
				g	T	N	T	N	M	M
a	s	l	d	t	A	I	A	I	I	I
c	c	a	u	m	R	S	R	S	L	L
t	c	g	r	d	T	H	T	H	E	E
Task 0	Mile 1	ss_0	1	.	26JAN04	26JAN04	28JAN04	28JAN04	.	.
Mile 1	Task 2		0	26JAN04	26JAN04	26JAN04	28JAN04	28JAN04	.	.
Task 2			1	.	26JAN04	26JAN04	28JAN04	28JAN04	.	.
Task 3	Mile 4		1	.	26JAN04	26JAN04	28JAN04	28JAN04	.	.
Mile 4			0	26JAN04	26JAN04	26JAN04	28JAN04	28JAN04	1	1
Task 5	Mile 6		1	.	26JAN04	26JAN04	26JAN04	27JAN04	.	.
Mile 6	Mile 7	FS_1	0	26JAN04	26JAN04	26JAN04	27JAN04	27JAN04	1	1
Mile 7			0	27JAN04	27JAN04	27JAN04	28JAN04	28JAN04	1	1
Task 8	Mile 9	SS_3	1	.	26JAN04	26JAN04	26JAN04	26JAN04	.	.
Mile 9	Mile 10		0	29JAN04	29JAN04	29JAN04	29JAN04	29JAN04	.	.
Mile 10			0	29JAN04	29JAN04	29JAN04	29JAN04	29JAN04	.	.
Task 11	Mile 12		2	.	26JAN04	27JAN04	26JAN04	27JAN04	.	.
Mile 12	Mile 13	FS_1	0	27JAN04	27JAN04	27JAN04	27JAN04	27JAN04	1	1
Mile 13			0	28JAN04	28JAN04	28JAN04	28JAN04	28JAN04	1	1

The next invocation of CPM illustrates the effect of alignment constraints on the milestones. As explained in the “[Finish Milestones](#)” section on page 94, imposing an alignment constraint of type SGE on a milestone may change it from a finish milestone to a start milestone (default behavior) as far as the early schedule of the project is concerned. In the following program, the CPM procedure is invoked with the SETFINISHMILESTONE option and the ALIGNDATE and ALIGNTYPE statements. The resulting schedule is printed in [Output 2.28.4](#). Note that the early schedule of the milestones should now correspond to the values in the variable miledat. Note also that the activities ‘Mile 12’ and ‘Mile 13’ are no longer finish milestones, as indicated by missing values for the variable EFINMILE. The ‘SGE’ alignment constraint with a target date of 28JAN04 moves the milestone ‘Mile 12’ to the beginning of January 28, 2004, instead of the end of January 27, 2004.

```
proc cpm data=tasks out=out2
  collapse
  interval=day
  date='26jan04'd
  setfinishmilestone;
  activity act;
  successor succ /lag=(lag);
  duration dur;
  aligndate target;
  aligntype trgttype;
  id target trgttype lag miledat;
run;

title 'Schedule with option SETFINISHMILESTONE';
title2 'Target Dates change Early Schedule for some Milestones';
proc print;
  id act;
```

```
var succ lag target trgttype miledat e_start e_finish
    l_start l_finish efinmile lfinmile;
run;
```

Output 2.28.4. Effect of Alignment Constraints

Schedule with option SETFINISHMILESTONE										
Target Dates change Early Schedule for some Milestones										
			t	m	E	E	L	L	E	
			r	i	—	—	—	—	—	
			g	l	S	I	S	I	N	
			a	e	T	N	T	N	M	
			t	a	A	I	A	I	I	
			s	t	R	S	R	S	L	
			l	e	T	H	T	H	E	
			c	e						
			a	p						
			u	t						
			l	e						
			c	e						
			c	p						
			g	t						
Task 0	Mile 1	ss_0	26JAN04	SGE	.	26JAN04	26JAN04	28JAN04	28JAN04	. .
Mile 1	Task 2	.	26JAN04	.	26JAN04	26JAN04	28JAN04	28JAN04	28JAN04	. .
Task 2	.	.	26JAN04	.	26JAN04	26JAN04	28JAN04	28JAN04	28JAN04	. .
Task 3	Mile 4	.	26JAN04	.	26JAN04	26JAN04	28JAN04	28JAN04	28JAN04	. .
Mile 4	.	.	26JAN04	.	26JAN04	26JAN04	28JAN04	28JAN04	28JAN04	1 1
Task 5	Mile 6	.	26JAN04	.	26JAN04	26JAN04	27JAN04	27JAN04	27JAN04	. .
Mile 6	Mile 7	FS_1	26JAN04	.	26JAN04	26JAN04	27JAN04	27JAN04	27JAN04	1 1
Mile 7	.	.	27JAN04	.	27JAN04	27JAN04	28JAN04	28JAN04	28JAN04	1 1
Task 8	Mile 9	SS_3	26JAN04	.	26JAN04	26JAN04	26JAN04	26JAN04	26JAN04	. .
Mile 9	Mile 10	.	29JAN04	.	29JAN04	29JAN04	29JAN04	29JAN04	29JAN04	. .
Mile 10	.	.	29JAN04	.	29JAN04	29JAN04	29JAN04	29JAN04	29JAN04	. .
Task 11	Mile 12	.	26JAN04	.	26JAN04	27JAN04	26JAN04	27JAN04	27JAN04	. .
Mile 12	Mile 13	FS_1	28JAN04	SGE	28JAN04	28JAN04	28JAN04	27JAN04	27JAN04	. 1
Mile 13	.	.	29JAN04	.	29JAN04	29JAN04	28JAN04	28JAN04	28JAN04	. 1

The interpretation of the start and finish times for a milestone depends on whether it is a start milestone or a finish milestone. By default, all milestones are start milestones and are assumed to be scheduled at the beginning of the date specified in the start or finish time variable. As such, PROC GANTT displays these milestones at the start of the corresponding days on the Gantt chart. However, if a milestone is a finish milestone then it may not be displayed correctly on the Gantt chart, depending on the scale of the display.

In this example, PROC GANTT is used to display the schedule produced in [Output 2.28.4](#). Recall that the schedule is saved in the data set out2. First, PROC GANTT is invoked without any modifications to the schedule data set. The resulting Gantt chart is displayed in [Output 2.28.5](#). Note that the finish milestones (with values of EFINMILE = '1') are not plotted correctly. For example, 'Mile 6' is plotted at the *beginning* instead of the *end* of the schedule bar for the predecessor activity, 'Act 5'. To correct this problem, you can adjust the schedule variables for the finish milestones and plot the new values, as illustrated by the second invocation of PROC GANTT. The corrected Gantt chart is displayed in [Output 2.28.6](#).

```
title h=1.5
    'Schedule with option SETFINISHMILESTONE and ALIGNDATE';
title2 'Gantt Chart of Early Schedule without adjustment';
proc gantt data=out2(drop=1_.);
    chart / compress act=act succ=succ lag=lag
           font=swiss scale=7
           cprec=cyan cmile=magenta
           caxis=black cframe=ligr;
```

```

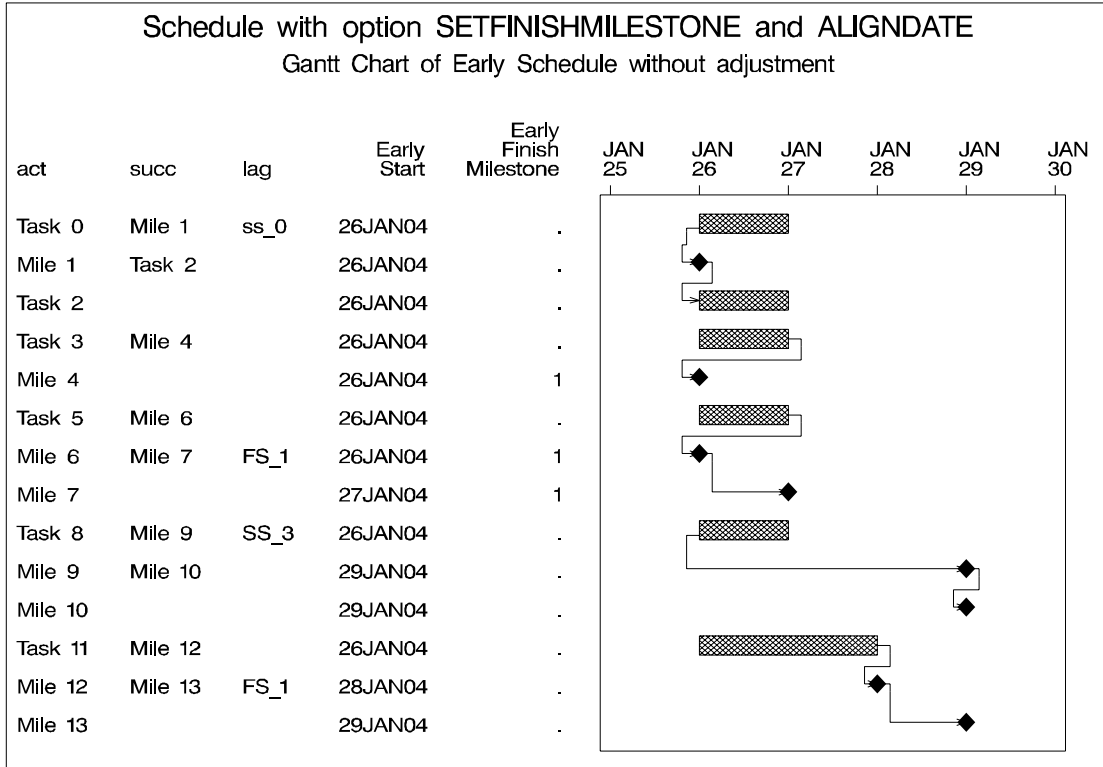
        dur=dur nojobnum nolegend;
    id act succ lag e_start efinmile;
run;

/* Save adjusted E_START and E_FINISH times for finish
   milestones */
data temp;
    set out2;
    format estart efinish date7.;
    estart = e_start;
    efinish = e_finish;
    if efinmile then do;
        estart=estart+1;
        efinish=efinish+1;
    end;
run;

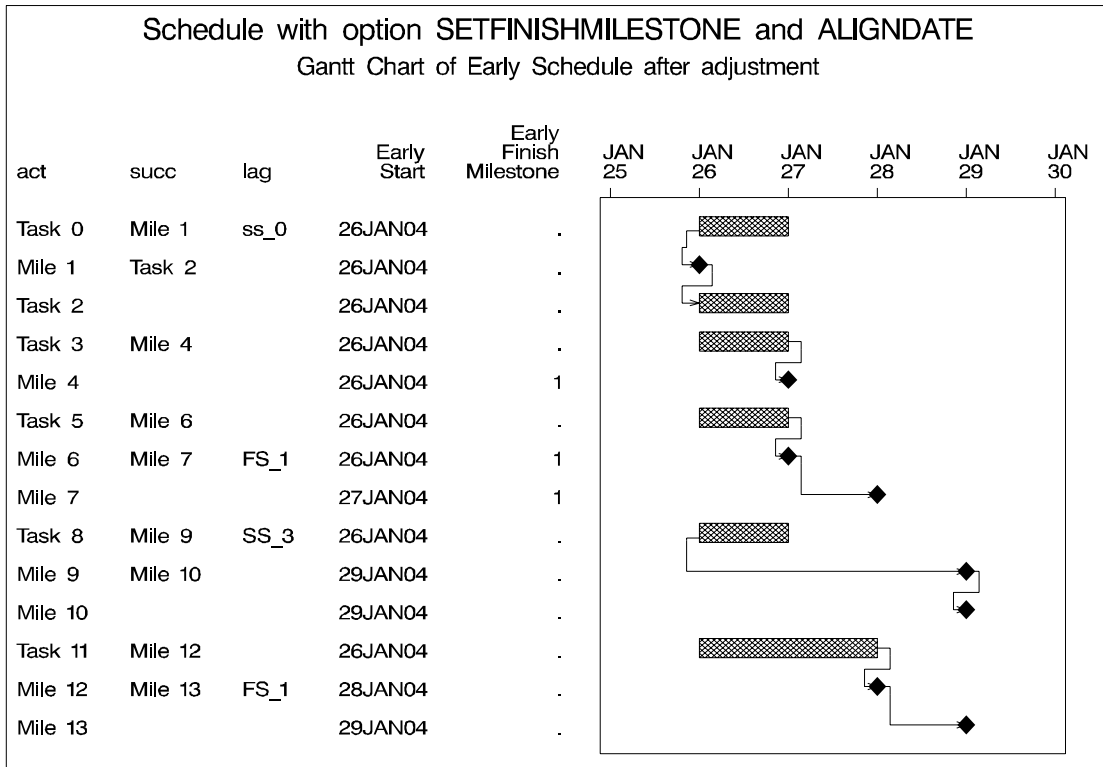
/* Plot the adjusted start and finish times for the
   early schedule */
title h=1.5
    'Schedule with option SETFINISHMILESTONE and ALIGNDATE';
title2 'Gantt Chart of Early Schedule after adjustment';
proc gantt data=temp(drop=1_:);
    chart / compress act=act succ=succ lag=lag
        font=swiss scale=7
        es=estart ef=efinish
        cprec=cyan cmile=magenta
        caxis=black cframe=ligr;
        dur=dur nojobnum nolegend;
    id act succ lag e_start efinmile;
run;

```


Output 2.28.5. Gantt Chart of Unadjusted Schedule



Output 2.28.6. Gantt Chart of Adjusted Schedule



Example 2.29. Negative Resource Requirements

This example illustrates the use of negative resource requirements and the MILESTONERESOURCE option. Consider the production of boxed greeting cards that need to be shipped on trucks with a given capacity. Suppose there are three trucks with a capacity of 10,000 boxes of cards each. Suppose also that the boxes are produced at the rate of 5,000 boxes a day by the box-creating activity, ‘First Order’ with a duration of 6 days, and requiring the use of a machine, say resource Mach1. The activity data set OneOrder, displayed in [Output 2.29.1](#), represents the activities that are to be scheduled. Note that the “Schedule Truck i ” task ($i = 1, 2, 3$) is represented as a milestone to denote the point in time when the required number of boxes are available from the production line. The variable numboxes denotes the number of boxes that are produced by the machine, or delivered by the trucks. The Resource data set OneMachine, displayed in [Output 2.29.2](#), defines the resource numboxes as a consumable resource and the resources Mach1 and trucks as replenishable resources.

Output 2.29.1. Activity Data Set

Greeting Card Production Activity Data Set OneOrder						
Obs	Activity	succ	Duration	Mach1	numboxes	trucks
1	First Order		6	1	-5000	.
2	Sched truck1	Delivery 1	0	.	10000	.
3	Sched truck2	Delivery 2	0	.	10000	.
4	Sched truck3	Delivery 3	0	.	10000	.
5	Delivery 1		2	.	.	1
6	Delivery 2		2	.	.	1
7	Delivery 3		2	.	.	1

Output 2.29.2. Resource Data Set

Resource Data Set OneMachine					
Obs	per	obstype	Mach1	numboxes	trucks
1	.	restype	1	2	1
2	15AUG04	reslevel	1	.	1

The following statements invoke the CPM procedure to schedule the production of the boxed greeting cards. The option MILESTONERESOURCE indicates that milestones can consume resources. In this case, the milestones representing the scheduling of the trucks are scheduled only when 10,000 boxes of greeting cards are available. The resulting schedule is displayed in [Output 2.29.3](#) using PROC GANTT, and the resource usage data set is displayed in [Output 2.29.4](#).

```
proc cpm data=OneOrder resin=OneMachine
  out=OneSched rsched=OneRsch resout=OneRout
  date='15aug04'd;
act      activity;
succ     succ;
duration duration;
```

```

resource Mach1 numboxes trucks / period=per
                                obstype=obstype
                                milestone=resource;

run;

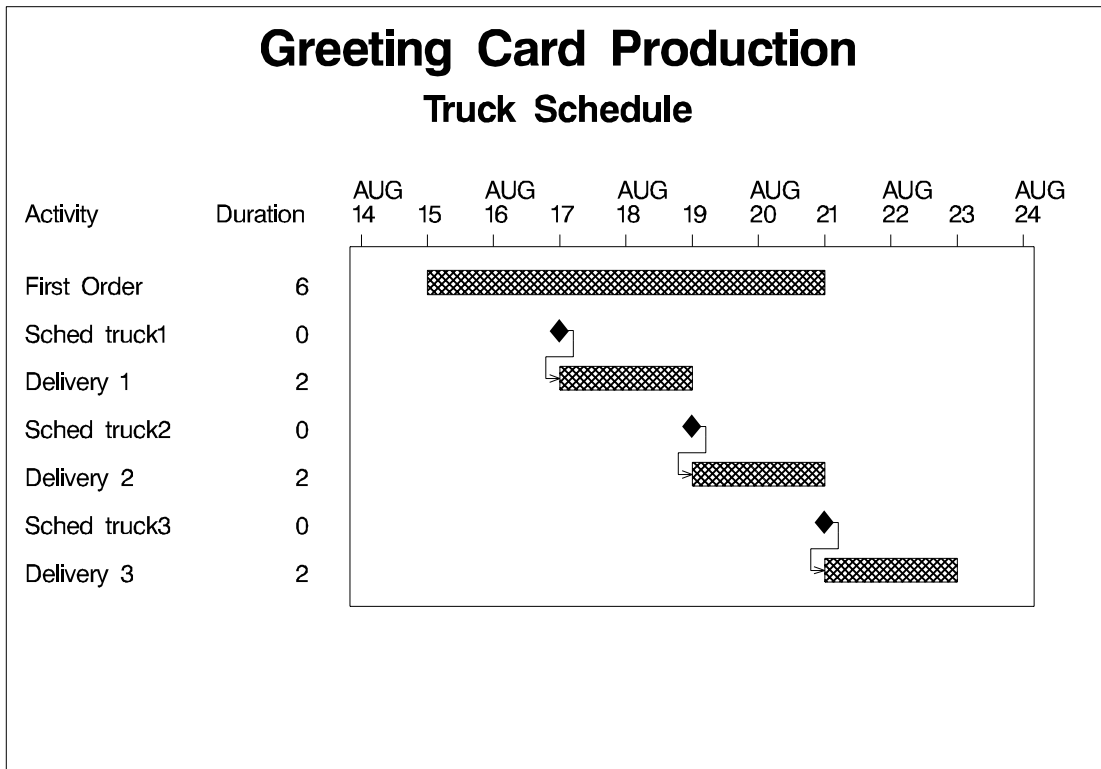
proc sort data=OneSched;
  by s_start;
run;

title 'Greeting Card Production';
title2 'Truck Schedule';
title h=2 f=swissb 'Greeting Card Production';
title h=1.5 f=swissb 'Truck Schedule';
proc gantt data=OneSched (drop=e_: l_:) ;
  chart / act=activity succ=succ duration=duration
         cmile=red top
         nolegend nojobnum;
  id activity duration;
run;

title2 'Resource Usage Data Set';
proc print data=OneRout;
  id _time_;
run;

```

Output 2.29.3. Gantt Chart of Schedule



The resulting Gantt chart shows the schedule of the trucks, which is staggered according to the production rate of the machine that produces the cards. In other words,

the trucks are scheduled at intervals of 2 days. The Resource Usage data set shows the production/consumption rate of the boxes for each day of the project.

Output 2.29.4. Resource Usage Data Set

Resource Usage Data Set												
	E	L	R	A	E	L	R	A	E	L	R	A
—	M	M	M	M	u	u	u	u	t	t	t	t
T	a	a	a	a	b	b	b	b	r	r	r	r
I	c	c	c	c	o	o	o	o	u	u	u	u
M	c	c	c	c	x	x	x	x	c	c	c	c
E	h	h	h	h	e	e	e	e	k	k	k	k
—	1	1	1	1	s	s	s	s	s	s	s	s
15AUG04	1	1	1	0	25000	-5000	-5000	0	3	0	0	1
16AUG04	1	1	1	0	-5000	-5000	-5000	5000	3	0	0	1
17AUG04	1	1	1	0	-5000	-5000	5000	10000	0	0	1	0
18AUG04	1	1	1	0	-5000	-5000	-5000	5000	0	0	1	0
19AUG04	1	1	1	0	-5000	25000	5000	10000	0	3	1	0
20AUG04	1	1	1	0	-5000	-5000	-5000	5000	0	3	1	0
21AUG04	0	0	0	1	0	0	10000	10000	0	0	1	0
22AUG04	0	0	0	1	0	0	0	0	0	0	1	0
23AUG04	0	0	0	1	0	0	0	0	0	0	0	1

Example 2.30. Auxiliary Resources and Negative Requirements

This example extends the production scenario in the previous example to two separate orders of the greeting cards. Suppose also that the machine used in [Example 2.29](#) is to be replaced by a faster machine that is scheduled to come on-line on August 24, 2004. This scheduling problem is modeled using alternate resources `Mach1` and `Mach2` for a primary resource `Machine`. Each of the alternate resources produces the auxiliary resource `numboxes`; the rate of production depends on which machine is used.

The Activity data set `TwoOrders`, displayed in [Output 2.30.1](#), now contains additional activities corresponding to the second order of greeting cards. Note that the resource requirement corresponding to the machine needed for the production is now represented in terms of the generic machine resource, `Machine`. The resource data set, `TwoMachines`, displayed in [Output 2.30.2](#), specifies `Mach1` and `Mach2` as alternate resources for `Machine` and the resource `numboxes` as an auxiliary resource produced at the rate of 5,000 by `Mach1` and 10,000 by `Mach2`. Observations 5 and 6 indicate that the first machine is available from August 15 and is then replaced by the second machine on August 24, 2004.

Output 2.30.1. Activity Data Set

Greeting Card Production - Machines 1 and 2								
Activity Data Set TwoOrder								
	A		D			n		—
	c		u	M		u		p
	t		r	a		m		a
	i		a	c	M	M	b	r
	v	s	t	h	a	a	o	u
O	i	u	i	i	c	c	x	c
b	t	c	o	n	h	h	e	k
s	y	c	n	e	1	2	s	s
								n
1	First Order		6	1	.	.	.	1
2	Sched truck1	Delivery 1	0	.	.	.	10000	1
3	Sched truck2	Delivery 2	0	.	.	.	10000	1
4	Sched truck3	Delivery 3	0	.	.	.	10000	1
5	Delivery 1		2	.	.	.	.	1 1
6	Delivery 2		2	.	.	.	.	1 1
7	Delivery 3		2	.	.	.	.	1 1
8	Second Order		6	1	.	.	.	2
9	Sched truck4	Delivery 4	0	.	.	.	10000	2
10	Sched truck5	Delivery 5	0	.	.	.	10000	2
11	Sched truck6	Delivery 6	0	.	.	.	10000	2
12	Delivery 4		2	.	.	.	.	1 2
13	Delivery 5		2	.	.	.	.	1 2
14	Delivery 6		2	.	.	.	.	1 2

Output 2.30.2. Resource Data Set

Greeting Card Production - Machines 1 and 2								
Resource Data Set TwoMachines								
Obs	per	obstype	resid	Machine	Mach1	Mach2	numboxes	trucks
1	.	restype		1	1	1	2	1
2	.	altrate	Machine	.	1	1	.	.
3	.	auxres	Mach1	.	.	.	-5000	.
4	.	auxres	Mach2	.	.	.	-10000	.
5	15AUG04	reslevel		.	1	.	.	3
6	24AUG04	reslevel		.	0	1	.	.

The following statements invoke the CPM procedure to schedule the production of the two orders of boxed greeting cards and display the schedule (in [Output 2.30.3](#)) using PROC GANTT. Note that PROC GANTT is invoked with the PATTERN= option indicating that the schedules should be drawn using the pattern statements corresponding to the variable _pattern in the activity data set. In addition, the CTEXTCOLS= option indicates that the color of the text should match the color of the schedule bars.

```

proc cpm data=TwoOrders resin=TwoMachines
  out=TwoSched rsched=TwoRsched resout=TwoRout
  date='15aug04'd;
act      activity;
succ     succ;
duration duration;
resource Machine Mach1 Mach2 numboxes trucks / period=per
                                                obstype=obstype
                                                resid=resid
                                                milestoneresource;

id _pattern;
run;

```

```

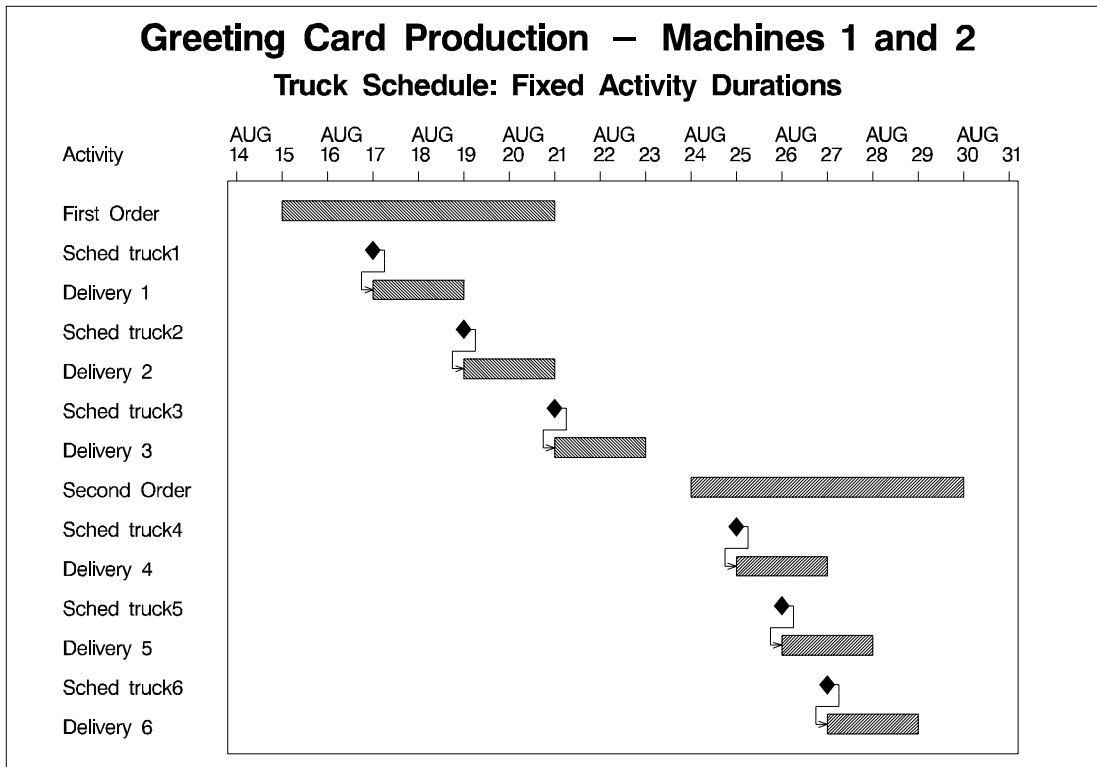
proc sort data=TwoSched;
  by s_start;
  run;

title h=1.5 f=swissb 'Greeting Card Production - Machines 1 and 2';
title2 h=1.2 f=swissb 'Truck Schedule: Fixed Activity Durations';
proc gantt data=TwoSched(drop=e_ 1:);
  chart / act=activity succ=succ duration=duration font=swiss
         nolegend nojobnum pcompress pattern=_pattern
         ctextcols=id scale=4;
  id activity ;
  run;

title2 'Resource Usage Data set: Fixed Activity Durations';
proc print data=TwoRout;
  if _time_;
  run;

```

Output 2.30.3. Gantt Chart of Schedule



The Gantt chart shows that the trucks corresponding to the second order of greeting cards depart at a faster rate (every day) than the ones corresponding to the first order (every 2 days). The faster delivery is enabled by the use of the faster machine for the second order. Note also that the activity 'Second Order' continues for a total of 6 days, even though the order is filled within the first 3 days. This is due to the fact that the activity is defined to have a fixed duration. The resource usage data set, displayed

in [Output 2.30.4](#) shows that 10,000 boxes are produced each day for 6 days, causing an inventory build up of 30,000 boxes at the end of the production schedule.

Output 2.30.4. Resource Usage Data Set

Resource Usage Data set: Fixed Activity Durations																			
	E	L	R	A		E	L	R	A		E	L	R	A					
	E	L	R	A		n	n	n	n										
	M	M	M	M		u	u	u	u		u	E	L	R	A				
-	a	a	a	a	E	L	R	A	E	L	R	A							
T	c	c	c	c	M	M	M	M	M	M	M		b	b	b	b			
I	h	h	h	h	a	a	a	a	a	a	a		o	o	o	o			
M	i	i	i	i	c	c	c	c	c	c	c		x	x	x	x			
E	n	n	n	n	h	h	h	h	h	h	h		e	e	e	e			
-	e	e	e	e	1	1	1	1	2	2	2		s	s	s	s			
15AUG04	2	2	0	0	0	0	1	0	0	0	0	60000	0	-5000	0	6	0	0	3
16AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	-5000	5000	6	0	0	3
17AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	5000	10000	0	0	1	2
18AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	-5000	5000	0	0	1	2
19AUG04	2	2	0	0	0	0	1	0	0	0	0	0	60000	5000	10000	0	6	1	2
20AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	-5000	5000	0	6	1	2
21AUG04	0	0	0	0	0	0	1	0	0	0	0	0	0	10000	10000	0	0	1	2
22AUG04	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1	2
23AUG04	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	3
24AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	-10000	0	0	0	0	3
25AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	0	10000	0	0	1	2
26AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	0	10000	0	0	2	1
27AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	0	10000	0	0	2	1
28AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	-10000	10000	0	0	1	2
29AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	-10000	20000	0	0	0	3
30AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	0	30000	0	0	0	3

Example 2.31. Resource-Driven Durations and Negative Requirements

A more realistic model for the truck scheduling example can be built if the activities ‘First Order’ and ‘Second Order’ are defined to be resource driven. In other words, specify the total amount of work (6 days of work) that is needed from the activity at a pre-specified rate (of 5,000 boxes per day), and allow the choice of machine to dictate the duration of the activity. This modified model is illustrated by the activity data set, *TwoOrdersRD*, and resource data set, *TwoMachinesRD*, printed in [Output 2.31.1](#) and [Output 2.31.1](#), respectively. The two orders for greeting cards have a work specification of 6 days if the generic machine *Machine* (which produces 5,000 boxes a day) is used. The resource data set has a new observation with value ‘resrcdur’ for the variable *obstype*. This observation specifies that the resources *Machine*, *Mach1* and *Mach2* drive the durations of activities that require them. The third observation in this data set specifies that the second machine is twice as fast as the first one, indicated by the fact that the alternate rate is 0.5. This implies that using the second machine will reduce the activity’s duration by 50 percent.

Output 2.31.1. Activity Data Set

Greeting Card Production - Machines 1 and 2									
Activity Data Set TwoOrdersRD									
	A		D		M		n		—
	c		u		a		u		p
	t		r		c		m		a
	i		a		M		b		t
	v	s	t	w	a	a	o	r	e
	o	u	i	o	i	c	x	c	k
	b	t	c	o	r	n	h	h	e
	s	y	c	n	k	e	1	2	s
1	First Order		1	6	1	.	.	.	1
2	Sched truck1	Delivery 1	0	.	.	.	10000	.	1
3	Sched truck2	Delivery 2	0	.	.	.	10000	.	1
4	Sched truck3	Delivery 3	0	.	.	.	10000	.	1
5	Delivery 1		2	.	.	.	.	1	1
6	Delivery 2		2	.	.	.	.	1	1
7	Delivery 3		2	.	.	.	.	1	1
8	Second Order		1	6	1	.	.	.	2
9	Sched truck4	Delivery 4	0	.	.	.	10000	.	2
10	Sched truck5	Delivery 5	0	.	.	.	10000	.	2
11	Sched truck6	Delivery 6	0	.	.	.	10000	.	2
12	Delivery 4		2	.	.	.	.	1	2
13	Delivery 5		2	.	.	.	.	1	2
14	Delivery 6		2	.	.	.	.	1	2

Output 2.31.2. Resource Data Set

Greeting Card Production - Machines 1 and 2								
Resource Data Set TwoMachinesRD								
Obs	per	obstype	resid	Machine	Mach1	Mach2	numboxes	trucks
1	.	resrcdur		1	1	1.0	.	.
2	.	restype		1	1	1.0	2	1
3	.	altrate	Machine	.	1	0.5	.	.
4	.	auxres	Mach1	.	.	.	-5000	.
5	.	auxres	Mach2	.	.	.	-10000	.
6	15AUG04	reslevel	.	.	1	.	.	3
7	24AUG04	reslevel	.	.	0	1.0	.	.

The following statements invoke PROC CPM with the additional specification of the WORK= option. Once again, the CPM procedure allocates one of the two machines for the production, depending on the availability. The Gantt chart is displayed in [Output 2.31.3](#) and the resource usage data set is printed in [Output 2.31.4](#). As before, the trucks for the first order depart every second day requiring a total of 6 days, while the second order is completed in 3 days. Also, using a resource-driven duration model allows the second activity to be completed in 3 days instead of 6 days, as in the previous example. The resource usage data set indicates that production is stopped as soon as the two orders are filled, avoiding excess inventory.

```
proc cpm data=TwoOrdersRD resin=TwoMachinesRD
  out=TwoSchedRD rsched=TwoRschedRD resout=TwoRoutRD
  date='15aug04'd;
  act      activity;
  succ     succ;
  duration duration;
  resource Machine Mach1 Mach2 numboxes trucks / period=per
  obstype=obstype
```



```

resid=resid work=work
milestoneresource;

id _pattern;
run;

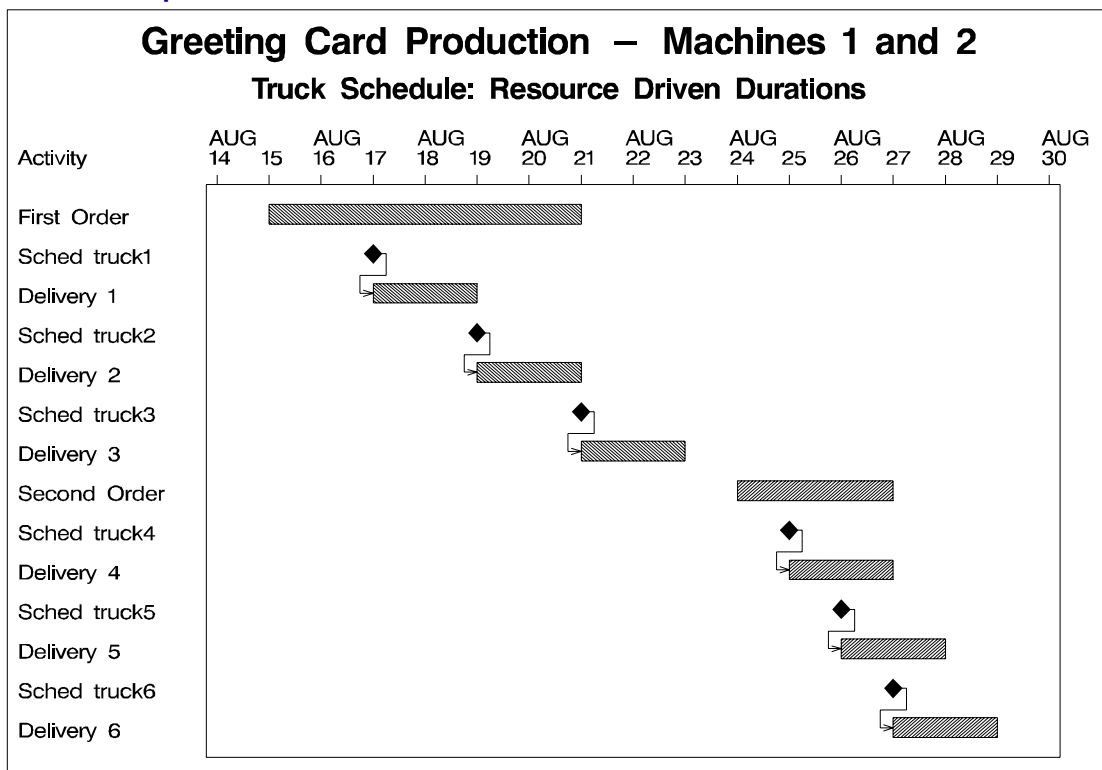
proc sort data=TwoSchedRD;
by s_start;
run;

title h=1.5 f=swissb 'Greeting Card Production - Machines 1 and 2';
title2 h=1.2 f=swissb 'Truck Schedule: Resource Driven Durations';
proc gantt data=TwoSchedRD(drop=e_: 1:);
chart / act=activity succ=succ duration=duration font=swiss
nolegend nojobnum compress pattern=_pattern
cxtxtcols=id scale=4;
id activity ;
run;

title2 'Resource Usage Data set: Resource Driven Durations';
proc print data=TwoRoutRD;
id _time_;
run;

```

Output 2.31.3. Gantt Chart of Schedule



Output 2.31.4. Resource Usage Data Set

Resource Usage Data set: Resource Driven Durations																						
										E	L	R	A									
										n	n	n	n									
										u	u	u	u	E	L	R	A					
										m	m	m	m	t	t	t	t					
										b	b	b	b	r	r	r	r					
										o	o	o	o	u	u	u	u					
										x	x	x	x	c	c	c	c					
										e	e	e	e	k	k	k	k					
										s	s	s	s	s	s	s	s					
15AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	60000	0	-5000	0	6	0	0	3	
16AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	0	0	-5000	5000	6	0	0	3	
17AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	0	0	5000	10000	0	0	1	2	
18AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	0	0	-5000	5000	0	0	1	2	
19AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	0	60000	5000	10000	0	6	1	2	
20AUG04	2	2	0	0	0	0	1	0	0	0	0	0	0	0	0	-5000	5000	0	6	1	2	
21AUG04	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	10000	10000	0	0	1	2
22AUG04	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	2	
23AUG04	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	3	
24AUG04	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	-10000	0	0	0	3	
25AUG04	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	10000	0	0	1	2
26AUG04	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	10000	0	0	2	1
27AUG04	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	10000	10000	0	0	2	1
28AUG04	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1	2	
29AUG04	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	3	

Statement and Option Cross-Reference Tables

The next two tables reference the statements and options in the CPM procedure that are illustrated by the examples in this section.

Table 2.28. Statements and Options Specified in Examples 2.1–2.17

Statement	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
ACTIVITY	X	X				X	X	X	X	X	X	X	X				
ACTUAL													X				
ALIGNDATE												X					
ALIGNTYPE												X					
BASELINE													X				
CALID										X							
DURATION	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
HEADNODE		X	X	X	X									X	X	X	X
HOLIDAY								X	X	X			X	X	X	X	X
ID	X	X	X	X	X	X								X	X	X	X
RESOURCE														X	X	X	X
SUCCESSOR	X					X	X	X	X	X	X	X	X				
TAILNODE		X	X	X	X									X	X	X	X
Option	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
A_FINISH													X				
ALAGCAL=											X						
A_START=													X				
AUTOUPDT													X				
AVPROFILE																	X
CALEDATA=									X	X	X						

Table 2.29. (continued)

Option	18	19	20	21	22	23	24	25	26	27	28	29	30	31
ADDCAL							X							
ADDWBS						X								
ALTBEOFRESUP			X											
AVPROFILE	X	X	X											
CALEDATA=							X							
COLLAPSE		X	X								X			
COMPARE=	X													
CUMUSAGE	X													
DATA=	X	X	X	X	X	X	X	X	X	X	X	X	X	X
DATE=	X	X	X	X		X	X	X	X	X	X	X	X	X
DELAY=			X											
DELAYANALYSIS	X		X											
FBDATE=						X								
F_FLOAT		X												
HOLIDATA=	X	X	X			X								
INFEASDIAGNOSTIC	X													
INTERVAL=	X	X	X			X	X	X	X	X	X			
LAG=											X			
MILESTONERESOURCE												X	X	X
MINSEGMTDUR=		X												
MULTIPLEALTERNATES									X	X				
OBSTYPE=	X	X	X				X	X	X	X		X	X	X
ORDERALL						X								
OUT=	X	X	X	X	X	X	X	X	X	X	X	X	X	X
PERIOD=	X	X	X		X		X	X	X	X		X	X	X
RCPROFILE	X	X	X											
RESID=			X					X	X	X			X	X
RESOURCEIN=	X	X	X		X		X	X	X	X		X	X	X
RESOURCEOUT=	X	X	X				X	X	X	X		X	X	X
RESOURCESCHED=							X	X	X	X		X	X	X
ROUTNOBREAK														
RSCHEDID=							X	X	X	X				
SEPCRIT						X								
SET=	X													
SETFINISHMILESTONE											X			
STOPDATE=					X									
T_FLOAT	X	X												
USEPROJDUR						X								
WORK=							X	X	X					X

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Chapter 3

The PM Procedure

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Chapter 3

The PM Procedure

Overview

The PM procedure is an interactive procedure that can be used for planning, controlling, and monitoring a project. The syntax and the scheduling features of PROC PM are virtually the same as those of the CPM procedure. However, since the PM procedure is interactive, there are a few extra options that are available and a few other options that have a default behavior that is different from the CPM procedure. These differences are noted in the “[Syntax](#)” section on page 285 and the “[Summary of Differences](#)” section on page 309. One major difference is that only the Activity-On-Node representation of the project is supported in PROC PM. In other words, TAILNODE and HEADNODE statements from PROC CPM are not supported.

For a complete description of the syntax and the scheduling algorithm for the CPM procedure, refer to [Chapter 2, “The CPM Procedure.”](#)

When PROC PM is invoked with the activity network representation, an interactive window is opened that displays a [Table View](#) of the project on the left and a [Gantt View](#) of the project on the right. You can add activities and edit the project data using the Table View. You can also use the Gantt View to move activities, change the durations of the activities, and add precedence constraints between the activities. These features are described in the “[Details](#)” section on page 288.

The PM procedure is designed to facilitate its inclusion in a Project Management application, such as [PROJMAN](#). Any changes that are made to the activity network or to the activity durations, resource requirements, alignment specifications, and other activity information need to be saved in the resulting Schedule output data set. Further, you should be able to use this output data set as input to a future invocation of PROC PM and continue to manage the project. Thus, there are some differences in the design of the Schedule data set (defined in [Chapter 2, “The CPM Procedure”](#)) to enable the integration of PROC PM into a Project Management application. The differences between the Schedule data sets in the two procedures are described in the “[Schedule Data Set](#)” section on page 309.

Getting Started

Consider the simple Software Development Project described in the “Getting Started” section of [Chapter 2, “The CPM Procedure.”](#) Recall that the Activity data set, SOFTWARE, contains the activity descriptions, durations, and precedence constraints. The following statements (identical to the PROC CPM invocation) initialize the project data and invoke the PM procedure.

```
data software;  
  format Descript $20. ;
```

```

input Descript &
      Duration
      Activity $
      Succesr1 $
      Succesr2 $ ;
datalines;
Initial Testing      20  TESTING  RECODE  .
Prel. Documentation  15  PRELDOC  DOCEDREV QATEST
Meet Marketing       1   MEETMKT  RECODE  .
Recoding             5   RECODE  DOCEDREV QATEST
QA Test Approve     10  QATEST  PROD    .
Doc. Edit and Revise 10  DOCEDREV PROD    .
Production           1   PROD    .      .
;

proc pm data=software
      out=introl
      interval=day
      date='01mar04'd;
id descript;
activity activity;
duration duration;
successor succesr1 succesr2;
run;

```

When you invoke the PM procedure, the PM Window appears (see [Figure 3.1](#)), consisting of the Table View and the Gantt View of the project. The activities are listed in the order in which they are defined in the Activity data set. The two views are separated by a dividing line that can be dragged to the left or right, controlling the size of the two views. Further, the two views scroll together in the vertical direction but can scroll independently in the horizontal direction.

The Table View contains several editable columns (in white) that can be used to edit the project data as well as add new activities to the project. Some of the columns (in gray), such as the Schedule times, are not editable. The Gantt View contains a Gantt chart of the project and displays the precedence relationships between the activities. You can use the Gantt View to add or delete precedence constraints between activities and to change the durations or alignment constraints of the activities by dragging the schedule bars. Details of the interface are described in the “[Details](#)” section on page 288.

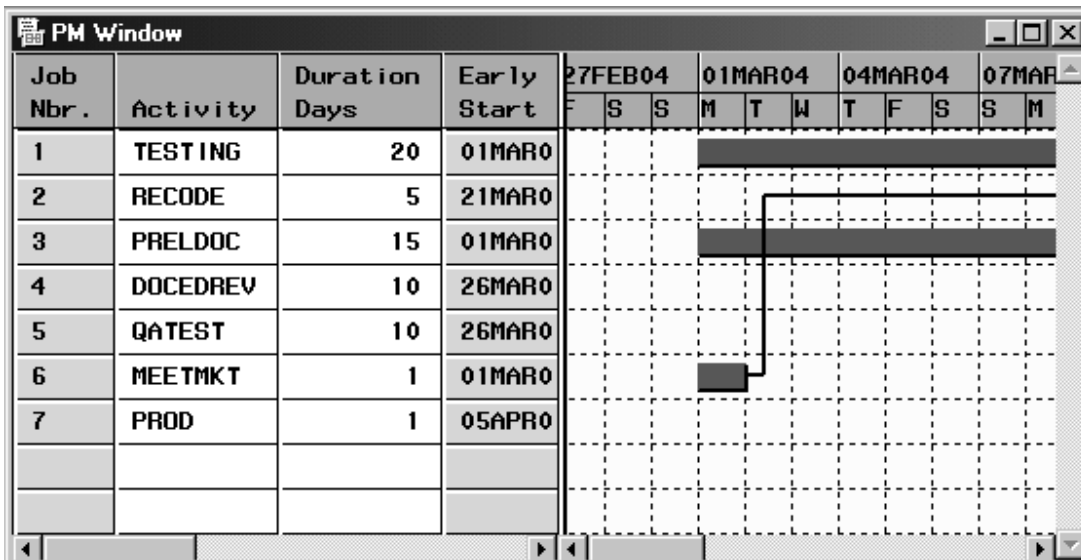


Figure 3.1. Software Development Project

Syntax

The syntax for PROC PM is virtually identical to that for [PROC CPM](#). The main difference is that you replace the PROC CPM statement with the PROC PM statement.

Note also that the TAILNODE and HEADNODE statements from PROC CPM are not supported in PROC PM.

The form of the PROC PM statement is

```
PROC PM options ;
```

PROC PM Statement

```
PROC PM options ;
```

All the options that are available in the PROC CPM statement ([Chapter 2, “The CPM Procedure”](#)) can also be specified in the PROC PM statement. However, there are a few additional options available with PROC PM, and some of the other PROC CPM options are not needed as they are the default behavior in PROC PM. See the section [“Summary of Differences”](#) for more details on these differences.

Options Specific to PROC PM

The following options can be specified on the PROC PM statement.

NODISPLAY

invokes the procedure in a noninteractive mode. The schedule for the project is still computed and the requested output data sets are created and saved. However, the PM Window is not displayed. This option is useful for scheduling large projects that do not need to be updated interactively. Note that invoking PROC PM with the

NODISPLAY option is similar to invoking PROC CPM; however, since the format of the Schedule output data set is different for the two procedures, you may see some differences in the order and content of the observations. See the section “[Schedule Data Set](#)” for details.

PROJECT=SAS-data-set

identifies a SAS data set that can be used to save and restore preferences that control the project view. For example, preferences such as the font, column order, column widths, filters, and so forth, can be saved from one invocation to another. See the section “[PROJECT Data Set](#)” for more details about this data set and the preferences that can be saved in it.

PROJECTNAME='string'

PROJNAME='string'

NAME='string'

specifies a descriptive string identifying the name of the project. This string is used to label the PM Window.

SUMMARYNAME='string'

SUMMARY='string'

PROJECTSUMMARY='string'

specifies a descriptive string identifying the summary task. By default, when there is more than one root parent activity in a project, PROC PM creates a summary task named “Summary” (or “Project Summary” if the input format for the activity variable is 15 or greater). So, if there is already child activity named “Summary” (or “Project Summary”) in the input data, the resulting schedule would form a cycle. The SUMMARYNAME= option enables you to override the default by specifying a different name for the summary task, thereby avoiding the aforementioned problem.

The following options of PROC CPM are turned on by default in PROC PM.

Default Options for PROC PM Statement

ADDACT

ADDALLACT

EXPAND

indicates that an observation is to be added to the Schedule output data set (and the Resource Schedule output data set) for each activity that appears as a value of the variables specified in the SUCCESSOR or PROJECT statements without appearing as a value of the variable specified in the ACTIVITY statement. In other words, the Schedule output data set produced by PROC PM contains one observation for every activity that appears as a value of the ACTIVITY, SUCCESSOR, or PROJECT variables (as long as it has not been deleted in the current invocation of the procedure). It also contains an observation for every activity that is added to the project using the graphical user interface.

XFERVARS

indicates that all relevant variables are to be copied from the Activity data set to the Schedule data set. The procedure carries over to the output data set all the relevant variables from the input data set. Thus, the Schedule output data set contains all the project information that is necessary to schedule it.

Default Options for ACTUAL Statement**AUTOUPDT**

requests that the procedure should assume automatic completion (or start) of activities that are predecessors to activities already completed (or in progress).

ESTIMATEPCTC**ESTPCTC****ESTPCTCOMP****ESTPROG**

indicates that a variable named PCT_COMP is to be added to the Schedule output data set (and the Resource Schedule output data set) that contains the percent completion time for each activity (for each resource used by each activity) in the project.

SHOWFLOAT

indicates that activities that are completed or in progress should have nonzero float.

Default Options for PROJECT Statement**ADDWBS****WBSCODE****WBS**

indicates that the PM procedure is to compute a WBS code for the activities in the project using the project hierarchy structure specified. This code is computed for each activity and stored in the variable WBS_CODE in the Schedule output data set.

DESCENDING**DESC**

indicates that, in addition to the ascending sort variables (ES_ASC, LS_ASC, and SS_ASC) that are requested by the ESORDER, LSORDER, and SSORDER options, the corresponding descending sort variables (ES_DESC, LS_DESC, and SS_DESC, respectively) are also to be added to the Schedule output data set.

ESORDER**ESO**

indicates that a variable named ES_ASC is to be added to the Schedule output data set; this variable can be used to order the activities in such a way that the activities within each subproject are in increasing order of the early start time. Note that this order is not necessarily the same as the one that would be obtained by sorting all the activities in the Schedule data set by E_START.

LSORDER**LSO**

indicates that a variable named LS_ASC is to be added to the Schedule output data set; this variable can be used to order the activities in such a way that the activities within each subproject are in increasing order of the late start time.

ORDERALL**ALL**

is equivalent to specifying the ESORDER and LSORDER options (and the SSORDER option when resource constrained scheduling is performed).

SSORDER**SSO**

indicates that a variable named SS_ASC is to be added to the Schedule output data set; this variable can be used to order the activities in such a way that the activities within each subproject are in increasing order of the resource-constrained start time.

Details

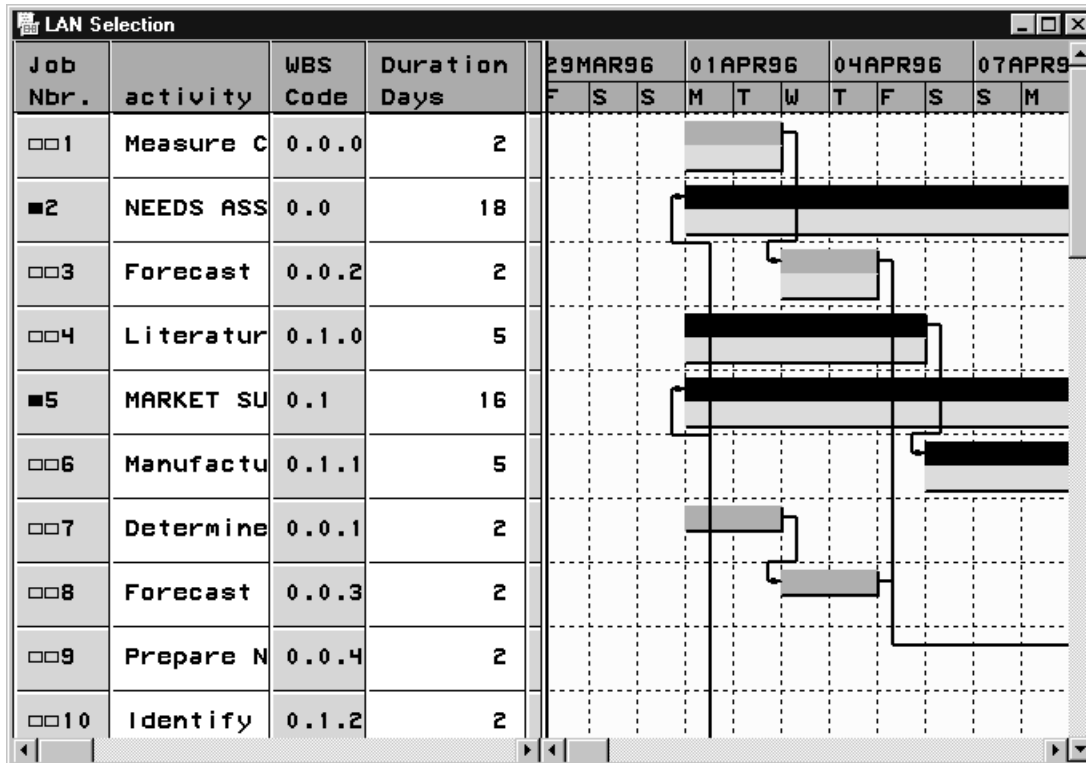


Figure 3.2. LAN Selection Project

The PM Window provides the standard editing and viewing functions of a typical project management tool. It can be displayed by invoking the **PM** procedure or using the Activities Window in the PROJMAN application (Chapter 8, “The Projman Application”). For an existing project, the PM Window is populated with the activities in the project. For a new project, the PM window is empty. Figure 3.2 displays the PM Window for one of the sample projects included with the PROJMAN application.

After you have finished editing the project, you can close the PM Window to save the new project data in the Schedule output data set that was specified in the invocation of the PM procedure.

User Interface Features

This section describes some of the typical features of the PM Window’s graphical user interface. The PM Window provides both a [Gantt View](#) and a [Table View](#) of the project. The size of each view can be changed by pointing the cursor at the dividing line between the two views until it changes to a double arrow and dragging it to the right or left.

Only part of the project may be visible in the PM Window; horizontal and vertical scroll bars are provided that enable you to scroll the project data in both directions. Note that the Gantt and the Table Views are attached to each other so that they scroll together vertically. Each view can be scrolled horizontally, independently of the other.

The pull-down menu associated with the PM Window provides access to several project management functions under the **Edit**, **View**, and **Project** menus. For example, the **Project** pull-down menu is shown in [Figure 3.3](#). The commands available through the pull-down menus are described in detail in the appropriate sections.

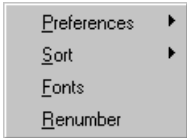


Figure 3.3. Project Pull-down Menu

In addition to the pull-down menus, context-sensitive pop-up menus are available in the Table and Gantt Views, the time axis, along the arcs, and from select columns in the Table View. Pop-up menus are displayed by positioning the cursor over a particular object and clicking the right mouse button. For example, clicking the right mouse button on an arc in the Gantt View displays the arc pop-up menu shown in [Figure 3.4](#).

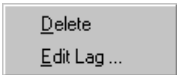


Figure 3.4. Arc Pop-up Menu

In some situations, the pop-up menu selection can lead to a dialog box that requires you to type a value in one or more of the fields in the box. For example, selecting **Edit Lag...** from the arc pop-up menu leads to the dialog box displayed in [Figure 3.5](#). (See the “[Create Nonstandard Precedence Relationships](#)” section on page 303 for a discussion of nonstandard precedence constraints.)

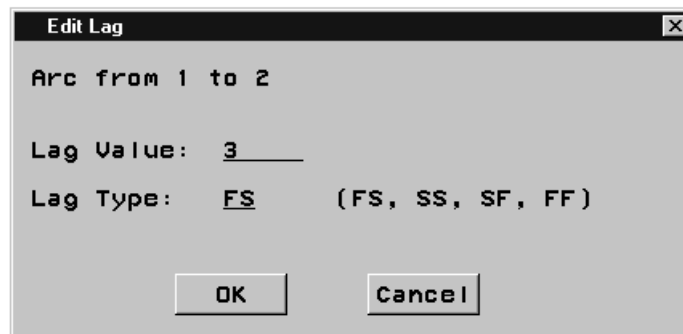


Figure 3.5. Edit Lag Dialog Box

The **Table View** displays project data in a tabular format. Some of the columns are editable (white background) while other columns, which are computed by the procedure, are not editable (gray background). The **Gantt View** always displays the early start schedule of the project. In addition, it also displays the resource-constrained schedule (if resources are present), the actual schedule (if the project has started and is in progress), and the baseline schedule (if a baseline schedule is saved for the project.) The display of all the schedule bars (except the Early Schedule bar) can be toggled on or off using the pop-up menu from the Gantt View.

Note that each row of the combined Table View and Gantt View represents one activity (also referred to as *task* in this chapter). Any change in data or movement of a row in one view is also reflected in the other.

In addition to the pull-down and pop-up menu actions, several drag-and-drop type of actions are available within the PM Window. You can move the columns and rows of the Table View by selecting a row or column and dragging to the desired position. You can also change the width of the columns by dragging the column dividers in the Table header region.

You can manipulate the durations of the tasks using the **Task Information** dialog box (see **Figure 3.6**) by right-clicking on the bar shown in or by changing the length of the Early Schedule bar in the Gantt View. You can also move the task in time by dragging the Early Schedule bar to a new position. This affects the Target Date for the associated task.

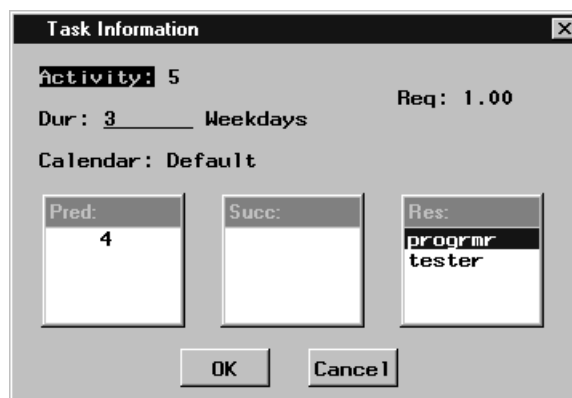


Figure 3.6. Task Information Dialog Box

Any of the preceding actions may result in a change to the project schedule that is immediately reflected in the Table and Gantt Views. All editing abilities and the corresponding changes to the schedule are described in detail in the following sections.

Project Hierarchy

The PM procedure displays a hierarchical project structure if it is invoked with the PROJECT statement. If the procedure is invoked without a PROJECT statement, the supertask and subtask relationship is not supported, and all the activities are considered to be at the same level, belonging to a single project. Note that, in the PROJMAN application (Chapter 8, “The Projman Application,”), the PM procedure is always invoked with the PROJECT statement.

If the PROJECT statement is used, then a task’s level in the project hierarchy is indicated in the Table View by using small square boxes to the left of the activity number in the Job Nbr. column. Empty boxes indicate that the activity does not have any subtasks (it is a *leaf* activity), while filled boxes indicate that the activity is a supertask. Further, a Project Summary task is included to represent the root task (or Summary Task) of the project. This task is positioned at the top of the list of activities, and its display can be toggled on or off by selecting **Display Summary Task** from the **View** pull-down menu (see Figure 3.7).

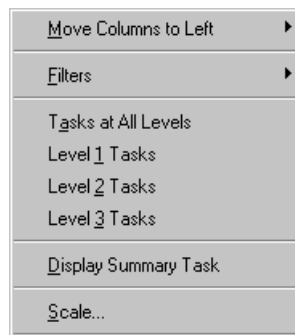


Figure 3.7. View Pull-down Menu

In the Gantt View, supertasks are indicated by vertical cones at the end of their corresponding schedule bars.

Note that the durations of the supertasks are determined by the overall duration of their subtasks. Thus, you cannot change the duration of a supertask.

If there is no PROJECT statement, all menu selections that correspond to the multi-project structure are grayed out and are unavailable for selection. For example, the **Display Summary Task** selection in Figure 3.7 will be grayed out.

Table View

The Table View displays information about a project in tabular form. It displays activities along with their descriptions, various activity schedules, resource requirements, calendars, and target dates. The hierarchical information about an activity is provided in the Job Nbr. column by a number of small square boxes to the left of the activity number. The number of square boxes corresponds to the level of the activity in the project hierarchy. Empty boxes indicate that the activity does not have any subtasks or that it is a leaf activity, while filled boxes indicate that the activity is a supertask. Some columns in the Table View are editable while others are write-protected. The editable columns are lighter in color than the noneditable ones. In general, you can type into all columns that provide input to the project, while all other columns that contain output values from PROC PM are write-protected. For example, in [Figure 3.2](#), the WBS Code column cannot be edited, while the Activity and Duration columns can be edited.

In the Table View, you can add or delete activities, add subtasks, change the order of the columns or the activities, edit activity information, and so on. These tasks are described in the following sections.

Add/Copy/Delete Tasks

Clicking the right mouse button on any task in the Table View displays the pop-up menu shown in [Figure 3.8](#). From this pop-up menu, you can Add/Copy/Delete the selected task. If the **Add Task** menu item is selected, the new task is added immediately following the selected task. You can also add a subtask to the selected task using the **Add Subtask** menu item. If the **Copy Task** menu item is selected, a copy of the selected task is added to the bottom of the Table View. The new task has the same duration and calendar as the selected task. If the selected task is a supertask, all its subtasks (and any internal precedence constraints) are copied as well.

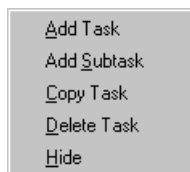


Figure 3.8. Table View Pop-up Menu

Change Column Width

The width of a column in the Table View can be increased or decreased by dragging (with the left mouse button) the column dividers in the Table Header region of the Table View. When the cursor is positioned on the column divider, it changes to a double arrow. Dragging it to the right or left increases or decreases the width of the column.

Change the Order of the Columns

The display order of columns in the Table View can be changed in several ways:

- Drag the column in the header row and drop it to the destination.
- Select **View** from the pull-down menu and then choose **Move Columns to Left** (see [Figure 3.9](#)). Choosing any of the available options moves the corresponding columns to the leftmost portion of the Table View.

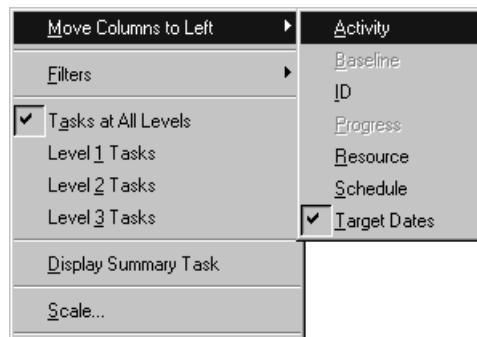


Figure 3.9. Move Columns Pull-down Menu

Edit Durations

To change the duration of an activity, edit the Duration column in the Table View. Note that changing an activity's duration to 0 changes the activity into a [Milestone](#). Activity durations can also be [changed](#) in the Gantt View.

Edit Alignment Constraints

Scroll to columns named Target Date and Target Type. Enter one of either SGE, SLE, MS, MF, FGE, or FLE in the Target Type column. You can either type the values or select them from the pop-up menu displayed by pressing the right mouse button in the Target Type column (see [Figure 3.10](#)). Enter the appropriate date in the Target Date column. You can also view these columns by selecting **View->Move Columns to Left->Target Dates** from the pull-down menu ([Figure 3.9](#)). You can also [change](#) an activity's alignment constraints in the Gantt View.



Figure 3.10. Target Type Pop-up Menu

Edit Calendars

To change an activity's calendar, you can enter the calendar number in the Activity Calendar column or the calendar description in the Calendar Name column. Note that the calendars that can be assigned to an activity are predefined in the Calendar data set. To see a list of the calendars, you can click in one of the calendar columns with the right mouse button. This will pop up a list of calendars, from which you can select the activity's calendar. See [Figure 3.11](#) for an example of a calendar pop-up menu with two calendars.

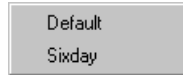


Figure 3.11. Calendar Pop-up Menu

Edit Resource Requirements

You can change the amount of resources required for an activity by editing the Resource columns in the Table View. Changing the resource requirement causes the project to be rescheduled using the new resource specifications. See the section “[Edit Resource Requirements](#)” for more details.

Edit Progress Information

You can edit the actual start, actual finish, percent complete, or remaining duration for an activity by editing one of the Progress Information columns in the Table View. Note that by changing one of these columns, all the other related progress columns may also be affected. For example, entering 100 in the Percent Complete column for an activity that is in progress updates the Remaining Duration column to 0, and the Actual Finish column is filled in appropriately. You can also modify the progress information of an activity in the [Gantt View](#).

Expand/Collapse Supertasks

Double-clicking on a supertask in the Table View toggles the expand/collapse switch. This action enables you to either view or hide all the subtasks of the supertask.

Hide Tasks

An individual task can be hidden by clicking the right mouse button over the task in the Table View and choosing **Hide** from the menu shown in [Figure 3.8](#). Tasks can also be hidden from view using several filters described in the “[Setting Activity Filters](#)” section.

Move Tasks

Drag with the left mouse button anywhere in the row corresponding to an activity you want to move and drop it to the destination.

Gantt View

In the Gantt View, activity schedules are pictorially depicted by horizontal bars. There is one bar for each of the early, resource, actual, and baseline schedules. For the Early Schedule bar, critical activities are marked in different colors than the noncritical activities. Weekends are marked by shaded vertical rectangles running through the chart. Supertasks are differentiated from leaf activities by anchoring vertical cones at the ends of their Early Schedule bars.

The Gantt View is displayed with a rectangular grid that can be turned on or off by selecting **Grid** from the pop-up menu (see [Figure 3.12](#)) that is displayed by right-clicking anywhere outside of the schedule bars in the Gantt View with the right mouse button.

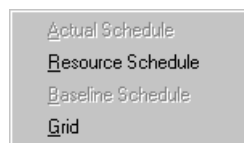


Figure 3.12. Gantt View Pop-up Menu

The pop-up menu in the Gantt View also enables you to toggle the display of the Actual, Resource, or Baseline Schedule bars. Note that these bars can be displayed in the Gantt View only if the project data contain the actual, resource-constrained, or baseline schedules, respectively.

In addition to displaying the activity schedules in an easy-to-view format, the Gantt View in the PM Window can also be used to change the durations of the activities, add or delete precedence constraints, set activity alignment constraints, set progress information, and provide access to calendar, precedence, and resource information.

You can also change several of the display attributes of the Gantt View by using the **Time Axis** pop-up menu (see [Figure 3.13](#)) to set the scale of the axis, format the time axis labels, set the units of display, and so forth. All of these tasks are described in the following sections.

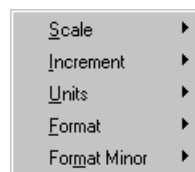


Figure 3.13. Time Axis Pop-up Menu

Change the Format of the Time Axis

The format of the major axis can be changed by clicking with the right mouse button on the header row of the Gantt View and choosing **Format** for the major axis. For the minor axis, choose **Format Minor**. Some example selections available for the formats are shown in [Figure 3.14](#) and [Figure 3.15](#). In addition to the formats explicitly listed for the major axis, you can specify any valid numeric format by selecting **Other...** and filling in the appropriate fields in the dialog box that is opened as a result.

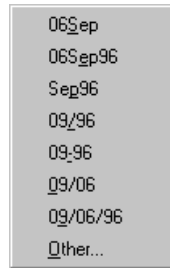


Figure 3.14. Major Axis Format Pop-up Menu

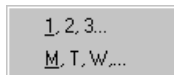


Figure 3.15. Minor Axis Format Pop-up Menu

Change Increments

Increments in the Gantt View define the number of tick marks on the minor axis per tick mark on the major axis. They can be changed by clicking with the right mouse button on the header area and choosing **Increment** from the pop-up menu. The available selections are shown in [Figure 3.16](#).

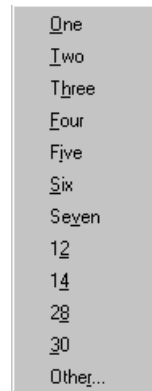


Figure 3.16. Increment Pop-up Menu

Change the Scale of the Time Axis

Point the mouse to a tick mark on the major axis in Gantt View. The cursor changes to a double arrow. Drag the tick mark horizontally to change the scale. You can also change the scale using the **Scale** pop-up menu (see [Figure 3.17](#)) from the **Time Axis** pop-up menu.

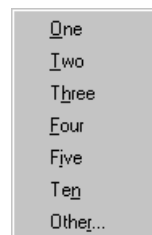


Figure 3.17. Scale Pop-up Menu

Change Units

The Time Axis Units in the Gantt View can be changed by clicking with the right mouse button on the header bar in the Gantt View and selecting **Units** (see [Figure 3.18](#)). The default value of the units used for display is based on the specification of the INTERVAL= parameter in the invocation of the PM procedure.

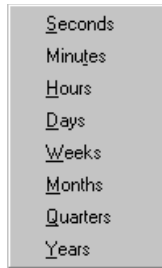


Figure 3.18. Units Pop-up Menu

Display/Hide Selected Schedules

A display/hide switch for a given schedule can be toggled by clicking with the right mouse button in the main panel of the Gantt View and choosing the desired schedule (see [Figure 3.19](#)).

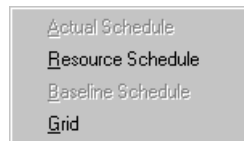


Figure 3.19. Gantt View Pop-up Menu

Display Task Information

You can display detailed information for an activity by right-clicking on any of its schedule bars and selecting **Task Information** from the resulting pop-up menu (see [Figure 3.20](#)).



Figure 3.20. Schedule Bar Pop-up Menu

The ensuing **Task Information** dialog box (see [Figure 3.21](#)) displays the job number, duration, duration units, a list of predecessor activities, and a list of successor activities, as well as applicable calendar and resource information for the selected activity. You can also edit the activity duration from the **Task Information** dialog box.

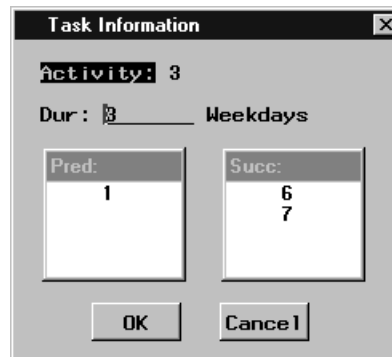


Figure 3.21. Task Information Dialog Box

If any calendars have been defined to the project, the activity calendar is also displayed. If the project utilizes any resources, there is a list box that lists the resources required by the activity (see [Figure 3.22](#)). Selecting a resource from this list box displays the quantity required by the activity in the **Req** field. Furthermore, if the selected resource drives the duration of the activity, then the appropriate work value is also displayed in the **Work** field.

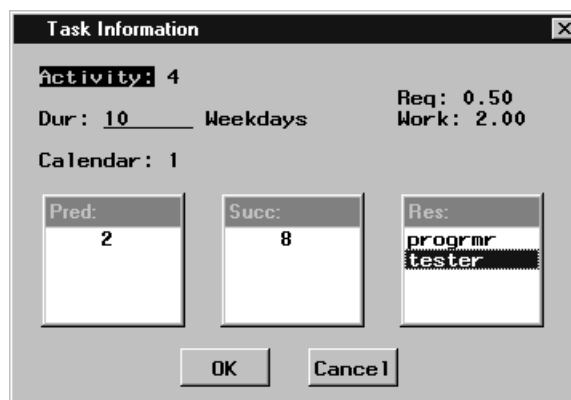


Figure 3.22. Task Information Dialog Box (Calendar and Resources)

Modify Activity Alignment Constraints

An activity's Early Schedule bar can be moved using the left mouse button. When the mouse is positioned over the activity bar, the cursor changes to a cross-hair type. You can then drag the bar horizontally and move it to a new position. This sets an alignment constraint of type 'SGE' for the selected activity with the align date corresponding to the one at the left edge of the bar's new position. Other types of alignment constraints can be entered by editing the Target Date and Target Type columns as described in the ["Edit Alignment Constraints"](#) section.

Modify Durations

You can modify the duration of an activity in several ways. In the Gantt View, you can enter it directly using the **Task Information** dialog box as described in the ["Display Task Information"](#) section, or change it indirectly by altering the width of the schedule bar. To change the duration of an activity, point to the right edge of the activity's Early

Schedule bar with the left mouse button, and drag to the left or the right depending on whether you want to decrease or increase the duration. You can also edit activity durations in the [Table View](#).

Modify Precedence Information

You can add precedence constraints by depressing the left mouse button at either end of the predecessor activity bar and releasing it at either end of the successor activity bar. The type of constraint (FS, FF, SS, or SF) depends on which end of the bars the constraints are drawn from.

You can delete precedence constraints by clicking on the arc with the right mouse button and selecting **Delete** (see [Figure 3.23](#)).

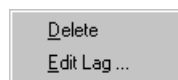


Figure 3.23. Arc Pop-up Menu

You can modify the type of the precedence constraint or the lag value associated with the precedence constraint by clicking on the arc with the right mouse button and selecting **Edit Lag**. The ensuing dialog box is shown in [Figure 3.24](#). Enter the value of the lag duration in the first field and the type of the lag in the second field. Valid values of lag are Finish-to-Start (FS), Start-to-Start (SS), Start-to-Finish (SF), and Finish-to-Finish (FF).

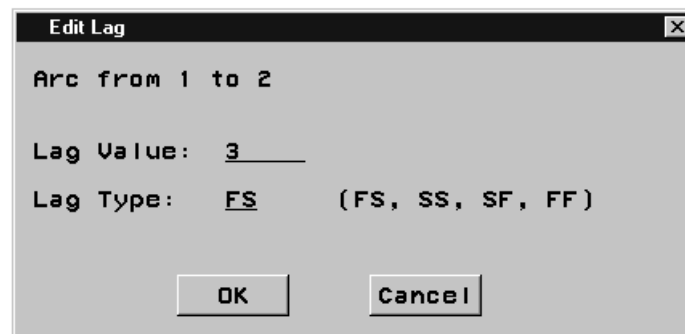


Figure 3.24. Edit Lag Dialog Box

If calendars are defined in the project, the **Edit Lag** dialog box includes the lag calendar associated with the selected precedence constraint. You can change the lag calendar by selecting from the list of available calendars that is displayed within the **Edit Lag** dialog box shown in [Figure 3.25](#).

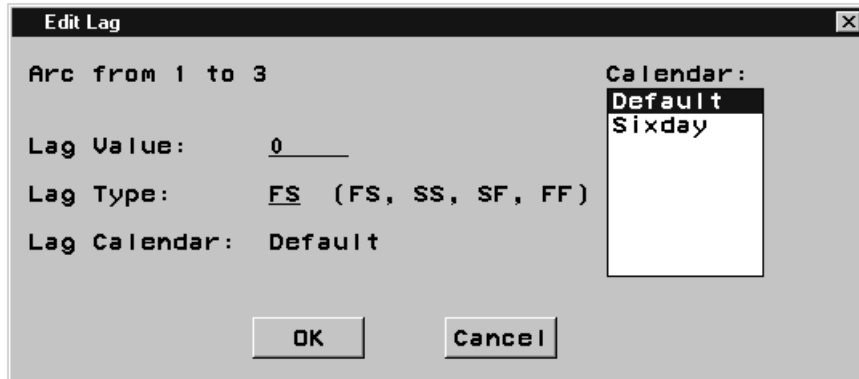


Figure 3.25. Edit Lag Dialog Box (Multiple Calendars)

Modify Progress Information

To modify the Progress using the Gantt View, you must include the Actual Schedule in the view. You can drag the actual schedule bar for the activity to change the amount of progress on the activity; you can also move the activity's actual bar to change the Actual Start of the activity.

When the project contains progress information, a Timenow line is drawn in the Gantt View, indicating the TIMENOW date. You can move the Timenow line by dragging it. When you change the value of TIMENOW, the progress information changes for all the activities. A confirmation window requires you to confirm that you do want to change the progress information for all the activities. (See also the “TIMENOW Macro Variable” section on page 309.)

You can also edit the progress columns in the [Table View](#).

Creating and Editing Projects

The PM Window provides an easy-to-use interface to enter basic project information such as a list of activities, their durations, order of precedence, resource requirements, and so forth. You can also use the **Edit** pull-down menu (see [Figure 3.26](#)) to add or delete progress, baseline, and other information. All these functions are described in the following sections.

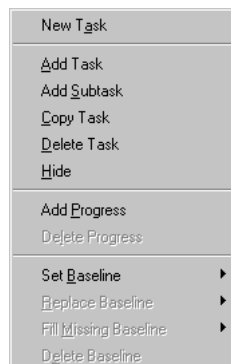


Figure 3.26. Edit Pull-down Menu

Add Activities

An activity (or task) can be added to the Project in the PM Window by clicking the right mouse button in the Table View. If **Add Task** is chosen from the pop-up menu, then an activity is added at the same level as the selected activity. Subtasks of an activity can be added by selecting **Add Subtask**. These actions are also available from the **Edit** pull-down menu (Figure 3.26) whenever an activity is selected in the Table View. Note that the selected activity is highlighted.

To add a new task at the topmost level of the project hierarchy, choose **New Task** from the **Edit** pull-down menu.

Add Precedence Constraints

To add precedence constraints in the Gantt view, point the cursor at the right edge of the predecessor activity until it changes to a cross-hair and drag it vertically up or down to the left edge of the successor activity. By starting and dropping at different ends of the activity bar, you can create [nonstandard precedence relationships](#) between the activities. You can view the predecessor and successor tasks for an activity from the [Task Information dialog box](#).

Add Baseline Information

Baseline information is saved in a project so that the current status of a project can be measured against some base schedule. The baseline information can be set in several different ways; most of the actions relating to the Baseline schedule can be performed using the selections available from the **Edit** pull-down menu (see Figure 3.26).

- If the project data include a Baseline schedule, saved in the variables B_START and B_FINISH, the PM Window displays the Baseline schedule when it is first invoked. This schedule can be replaced by choosing **Replace Baseline** from the **Edit** pull-down menu. This selection can be used to reset the Baseline schedule to a new schedule corresponding to one of the current schedules.
- If the project data do not include a Baseline schedule, it can be set in the PM Window by selecting **Set Baseline** from the **Edit** pull-down menu (see Example 3.3). This selection can be used to set the Baseline schedule to one of the current schedules (see Figure 3.27). Thus, selecting **Resource** from the pull-down menu sets the baseline schedule to the current resource-constrained schedule. By saving the current resource-constrained schedule, you can perform some what-if analysis by changing some of the resource requirements or other parameters of the project and comparing the resulting schedule with the saved baseline schedule.

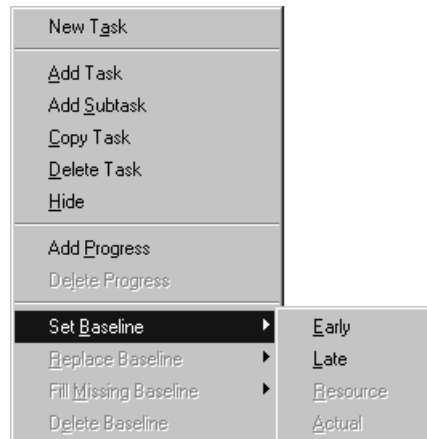


Figure 3.27. Set Baseline Pull-down Menu

- The individual Baseline values can also be edited in the Table View by changing the values in the Baseline Start and Baseline Finish columns.
- If new activities are added to the project, the Baseline values for the new tasks are missing. These can be set to correspond to the current schedule values by selecting **Fill Missing Baseline** from the **Edit** pull-down menu.
- If you want to delete the Baseline information from the project data, you can select **Delete Baseline** from the **Edit** pull-down menu.

Add Progress Information

Progress information can be included by using the **ACTUAL** statement, which is similar to the one for PROC CPM. If the PM Window is invoked without the ACTUAL statement, then progress information can be added to the Project from the **Edit** pull-down menu (Figure 3.26) by choosing **Add Progress**.

Progress information is updated by dragging the actual schedule bars horizontally (in a manner similar to the one for changing durations) in the Gantt View or by modifying the values in the Progress columns in the Table View. See the “**Modify Progress Information**” section on page 300 and the “**Edit Progress Information**” section on page 294.

For details on how the progress information is used to update the project schedule, see the “Progress Updating” section in Chapter 2, “The CPM Procedure.” See also Example 3.6.

Change Duration

The duration of an activity can be directly changed from the Duration column of the **Table View** or the **Task Information** dialog box of the **Gantt View**. It can also be indirectly changed by dragging the activity bar at the right edge using the left mouse button in the **Gantt View**.

Copy Activities

An activity (or task) can be copied in the PM Window by clicking the right mouse button in the Table View. If **Copy Task** is chosen from the pop-up menu, then a copy of the selected activity is added at the end of the activities listed in the Table View. The new task has the same duration and calendar as the selected task. If the selected task is a supertask, all its subtasks (and any internal precedence constraints) are copied as well.

Create Milestones

You can create milestones by adding an activity and assigning it zero duration.

Create Nonstandard Precedence Relationships

A Finish-to-Start relationship between two activities is considered to be a standard precedence constraint. You can create it in Gantt view by dragging the precedence constraint from the right end of the predecessor activity bar to the left end of the successor activity bar. Nonstandard precedence constraints are created by starting and ending at different ends of the two activity bars. For example, a Start-to-Finish relationship is created by dragging the cursor from the left end of the predecessor activity bar to the right end of the successor activity bar.

In addition to specifying the type of the precedence constraint, you can also specify a lag or lead time between the two activities. This lag value can be edited from the Gantt View. See the “[Modify Precedence Information](#)” section for more details.

Create Subtasks

Subtasks can be created only if the PM procedure is invoked with the PROJECT statement or from the PROJMAN application. To create a subtask, click the right mouse button on the parent activity in the Table View. Then choose **Add Subtask** from the background menu. The newly created subtask has one more little square box than the parent task in the Job Nbr. column in the Table View. The empty square boxes denote that it is a leaf activity (a task with no subtasks). The number of boxes denote a task's level in the project hierarchy, starting with level 0 for the Project Summary task.

Delete Activities

An activity can be deleted in the Table View by clicking the right mouse button anywhere in the task row and choosing **Delete Task**. If the selected task is a supertask, all its subtasks are deleted as well. Note that, in this case, a confirmation dialog box confirms the **Delete Supertask** action.

Delete Precedence Constraints

To delete a precedence constraint, click anywhere on the arc with the right mouse button and choose **Delete** from the pop-up menu. You can view the predecessor and successor tasks for an activity from the [task information window](#).

Edit Activity Alignment Constraints

Activity alignment constraints can be added/modified as described in sections “[Edit Alignment Constraints](#)” and “[Modify Activity Alignment](#)”, respectively.

Edit Baseline Information

To edit the baseline schedule, scroll to the Baseline Start and Baseline Finish columns, and type in the new values of the baseline start and finish times. Note that you cannot change the baseline values by moving the Baseline Schedule bars. See the section [Add Baseline Information](#) for more details.

Edit Calendar Specifications

Calendars are defined by the CALEDATA= option in the PROC PM statement. This option is similar to the corresponding option in PROC CPM. Once calendars are defined in the Project, an activity’s calendar can be changed or set in the Table View by editing the Activity Calendar or Calendar Name columns. You can either type the values or select them from the pull-down menu displayed by pressing the right mouse button in either of the Calendar columns. See the “[Edit Calendars](#)” section on page 294. You can also view the activity calendar from the [task information window](#).

Edit Resource Requirements

The resource requirement information for each activity is displayed and can be edited in the Table View. A column for a resource is created in the Table View when it is specified in the RESOURCE statement of the PROC PM invocation, or it is created by the Resource Manager of the PROJMAN application. For details about the RESOURCE statement, the Resource data set, and Resource Allocation, see [Chapter 2, “The CPM Procedure.”](#) Changing the resource requirement causes the project to be rescheduled using the new resources. You can also view the resource requirements for an activity from the [task information window](#).

If alternate resources are used by the scheduling algorithm, an extra set of columns is added to the Table View. These columns (one for every resource in the project) display the resources that were actually used. These Usage columns for the resources cannot be edited.

Setting Activity Filters

Activity filters can be set by using the project hierarchy or by selecting from a list of activity attributes, as described in this section.

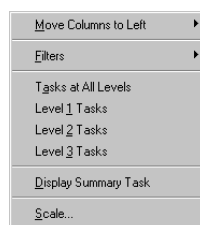


Figure 3.28. View Pull-down Menu

Activities at different levels in the hierarchy can be viewed by selecting **View** from the pull-down menu (Figure 3.28) and choosing the appropriate level of the project hierarchy to filter out the higher level tasks. For example, selecting **Level 2 Tasks** displays only the tasks that are at Level 2 or lower. All activities can be viewed by selecting **Tasks at All Levels** from the **View** pull-down menu.

Activities can also be filtered using different criteria by choosing **View->Filters** from the **View** pull-down menu (see Figure 3.28). The available filters are shown in Figure 3.29. By default, no filter is in effect (the selection is **None**); you can save the filter of your choice in the Preference data set (see the “Saving and Restoring Preferences” section on page 305).

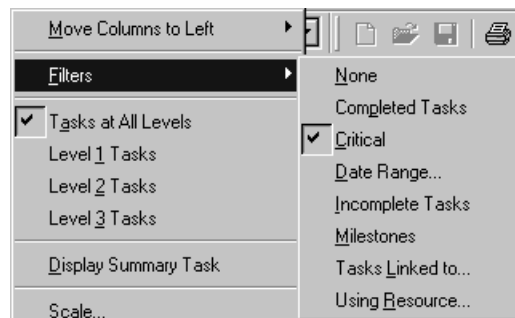


Figure 3.29. Filters Pull-down Menu

Saving and Restoring Preferences

When the PM Window is displayed for the first time for a given project, the order and width of the columns in the Table View, the font used for the display, the size of the window, the boundary between the Table and the Gantt Views, and several other attributes of the display are determined by the procedure. As you add activities and edit the Table View, you can change some of these attributes according to your preference. You can also choose a different level of display or set some activity filters (see the “Setting Activities Filter” section).

PROJECT Data Set

PROC PM enables you to save the attributes of the display in an indexed data set that is specified in the PROC PM statement, using the **PROJECT=** option. The following preferences can be saved from one invocation to another:

- text font
- time increment
- time units
- major time axis format
- minor time axis format
- schedule bars displayed (for example, Actual, Baseline, and so forth)
- chart grid
- chart scale

- table column widths
- table column order
- Table View-Gantt View dividing line
- activity filters
- activity level
- project summary
- window dimensions

The Project data set uses three variables to save the preference information:

- PROJATTR – contains a keyword identifying the project attribute; each attribute has either a numeric value or a character value. The length of this variable is 8.
- PRATNVAL – used for numeric data corresponding to the attribute.
- PRATCVL – used for character data corresponding to the attribute. The length of this variable is 200.

You can save and restore the preferences from the **Project** pull-down menu, which contains the **Preferences** submenu (Figure 3.30). Note that you have to explicitly save the project preferences using the **Save** selection from this pull-down menu. Closing the PM Window saves only the activity data of the project; it does not automatically save the project preferences. When you restore preferences, the state used is the one that was last saved for the project in the specified preference data set.

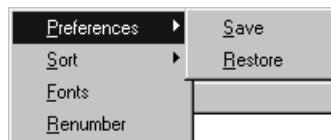


Figure 3.30. Preferences Pull-down Menu

Sorting Activities

Activities can be sorted by activity number, early start, late start, and resource start by choosing **Project->Sort** from the **Project** pull-down menu (see Figure 3.31). Once the activities are sorted, the Schedule output data set contains the activities in the new sorted order. See the “[Renumbering the Activities](#)” section on page 307.

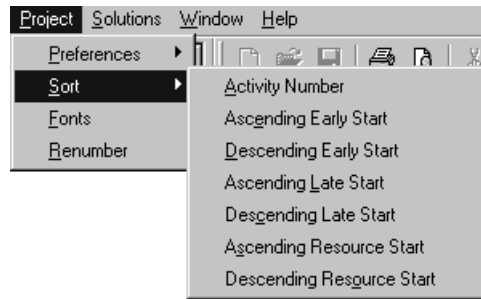


Figure 3.31. Sort Pull-down Menu

Setting the Project Font

When the PM Window is first displayed, the font used in all the text areas of the window is the same as the SAS font used in other windows. You can use the **Fonts** selection in the **Project** pull-down menu (Figure 3.32) to change the font used in the PM Window. You can choose the various fonts and their sizes from the font manager thus obtained. This font can also be saved (and restored) in the Project data set.

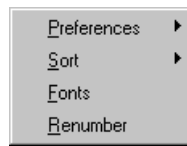


Figure 3.32. Project Pull-down Menu

Renumbering the Activities

When the PM Window is first displayed for the specified project, the activities are listed in the order in which they are defined in the Activity data set. The activity numbers displayed in the Job Nbr. column correspond to this same order. Even if the activities are rearranged, either by moving selected activities or by sorting, these numbers do not change. Likewise, no renumbering takes place automatically if activities are deleted from the project.

You can use the **Renumber** selection in the **Project** pull-down menu (Figure 3.32) to reassign consecutive numbers to the activities, starting from the first activity displayed.

When you close the PM Window, saving all the activity information to the Schedule data set, the activities are numbered according to the order in which they were displayed at the end of the editing session. In other words, the **Close** action implicitly invokes the **Renumber** command on the project activities. These activity numbers are, in fact, saved as the values of the ACTID variable (see the “Schedule Data Set” section on page 309).

Printing

The PM Window provides functionality to print the Gantt View, the Table View, or both, provided that a printer has been selected and the correct information has been set in the Printer Setup Window. **Print Preview** can be used to view the information before printing, and the printed output can be saved to a file. All the printing functions are available from the **File** pull-down menu (Figure 3.33).

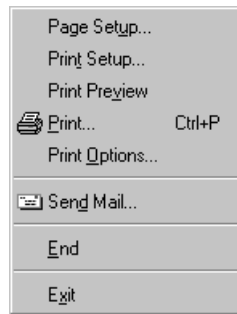


Figure 3.33. File Pull-down Menu

Preview the Printed Output on the Screen

You can view the printed output on screen before actually printing it by selecting **Print Preview** from the **File** pull-down menu.

Print Options

Select **Print Options** from the **File** pull-down menu. There are options for selecting time and activity axis range and scaling of the printed output. See Figure 3.34.

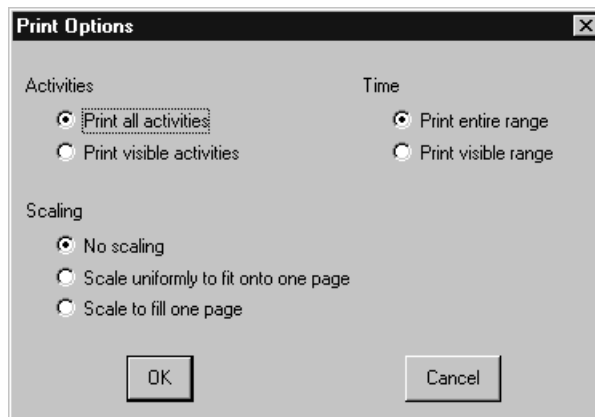


Figure 3.34. Print Options Dialog Box

Save the Printed Output to a File

The printed output can be saved to a file by selecting **File->Print ->Print to File**.

TIMENOW Macro Variable

The PM Window can be used to add and edit progress information to a project. When progress information is added, the Schedule data set contains all the **Progress** variables; see the “[Progress Updating](#)” section on page 105.

However, all the values of the progress variables are reconciled and revised on the basis of the value of the TIMENOW parameter. Since the PM procedure enables you to move the TIMENOW line as well as implicitly change the value of TIMENOW by updating the Actual Start or Finish times of the activities, the value of TIMENOW at the end of the editing session is an important parameter of the project. This value is saved in a macro variable called TIMENOW and can be used in subsequent editing sessions of the same project. See [Example 3.6](#) for an example of the use of the TIMENOW macro variable.

Summary of Differences

The computation of the schedule, the resource constrained scheduling algorithm, the resource usage information, and all other aspects of the scheduling engine for PROC PM are the same as the ones for PROC CPM. Refer to [Chapter 2, “The CPM Procedure,”](#) for details. Some minor differences pertaining to the Schedule Data set and ALIGNTYPE statement are explained in the following sections.

Schedule Data Set

The Schedule data set produced by PROC PM is very similar to the Schedule data set produced by PROC CPM. See the [OUT= Schedule Data Set](#) section in the PROC CPM chapter.

However, unlike PROC CPM, the PM procedure is interactive in nature, enabling you to add activities, set precedence constraints, reorder the activities, and so on. Thus, the output data set produced by PROC PM is designed to capture the original project data as well as all the changes that are made to the project in the course of the interactive session.

There are several differences between the forms of the Schedule output data sets produced by the PM and CPM procedures:

- The PM procedure automatically includes all relevant variables that are needed to define the project. Thus, the **ACTIVITY**, **SUCCESSOR**, **LAG**, **DURATION**, **ALIGNDATE**, and **ALIGNTYPE** variables are included in the output data set by default. If the **RESOURCE** statement is used, all the resource variables are also included. Likewise, if actual progress is entered for the project during the course of the interactive session, all the progress-related variables are added to the output data set.
- The PM procedure contains three sets of observations, identified by three different values of a new variable, **OBS_TYPE**. The first set of observations contains one observation for every activity in the project. The value of the **OBS_TYPE** variable for these observations is ‘**SCHEDULE**.’ These observations contain all the activity information such as the duration, the start and

finish times, the resource requirements, and so forth. The second set of observations contains one observation for every precedence constraint in the project. The value of the `OBS_TYPE` variable for these observations is 'LOGIC.' These observations contain all the precedence information such as the activity, successor, and lag information.

The third set of observations is present only if the project has resource-driven durations. The value of the `OBS_TYPE` variable for these observations is 'WORK.' These observations specify the `WORK` value for each resource used by each activity in the project.

- The order of the activities in the Schedule data set produced by PROC PM corresponds to the order in which the activities appear in the Table View at the end of the interactive session. Likewise, when the procedure is first invoked, the order of the activities in the Table View corresponds to the order in which the activities are defined in the Activity input data set. If, during the course of the session, some of the activities are reordered or deleted, or if some new activities are added, the Schedule output data set contains all the activities that are defined in the Table View at the end of the session.
- The PM procedure also assigns a numeric identifier for each activity. These values are assigned by PROC PM consecutively in the order of the activities in the Table View and saved in a variable called `ACTID` (see the section “[Renumbering the Activities](#)” on page 307). In addition to the `ACTID` variable, the Schedule data set also contains a numeric variable called `SUCCID`, which contains the numeric identifier for the successor activities in the observations for which `OBS_TYPE='LOGIC.'` If the `PROJECT` statement is used in the invocation of the PM procedure, a numeric variable called `PNTID` is added to the Schedule data set; this variable identifies the parent task for each activity.

Note: If the `ACTIVITY` variable in the Activity input data set is a character variable, the `ACTID`, `SUCCID`, and `PNTID` variables are added to the Schedule data set in addition to the `ACTIVITY`, `SUCCESSOR`, and `PROJECT` variables. On the other hand, if the `ACTIVITY` variable in the Activity input data set is numeric, the new `ACTID`, `SUCCID`, and `PNTID` variables replace the numeric `ACTIVITY`, `SUCCESSOR`, and `PROJECT` variables, respectively.

ALIGNTYPE Statement

In PROC PM, if an `ALIGNTYPE` variable is specified but not an `ALIGNDATE` variable, then no error message is generated; PROC PM ignores the `ALIGNTYPE` variable and generates a schedule. However, in PROC CPM, this results in an error message with no schedule generated.

RESOURCE Statement

In PROC CPM, the `NORESOURCEVARS` option in the `RESOURCE` statement requests that the variables specified in the `RESOURCE` statement be dropped from the Schedule data set. However in PROC PM, this has no effect.

Examples

This section illustrates some of the interactive features of PROC PM using a few simple examples that lead you through different stages of entering and editing project data. A simple software development project is used in all the examples. The output data set from one example is used as input to the next example. Where necessary, additional data sets are created, or the input data set is modified using simple DATA step code.

You could also use PROJMAN to create the software project and then proceed to each succeeding example using the application to define the calendars, resources, and so forth. The PROJMAN application automatically manages the required data sets.

Example 3.1. Defining a New Project

In this example, a simple software development project is built from scratch, starting with an empty Activity data set. PROC PM is invoked with an Activity data set that has no observations and just a few variables that are required to start the procedure. In addition to the Activity data set, a Project data set is also defined that is used to save the display attributes of the PM Window to be used between successive invocations of the procedure. The following program invokes PROC PM and opens a PM Window that enables you to enter project data. The initial window is shown in [Output 3.1.1](#).

Note that the PROJNAME= option is used in the PROC PM statement. This value is used to label the PM Window. Also specified in the PROC PM statement is the PROJECT= option that identifies the project attribute data set. The activities in the project follow a weekday calendar which is indicated to PROC PM by specifying the INTERVAL=WEEKDAY option. In the PM Window, the weekends are shaded gray in the Gantt View.

```

/* Initialize the Activity data set */
data software;
  length activity $20.;
  input activity $ actid succid pntid duration;
  datalines;
;

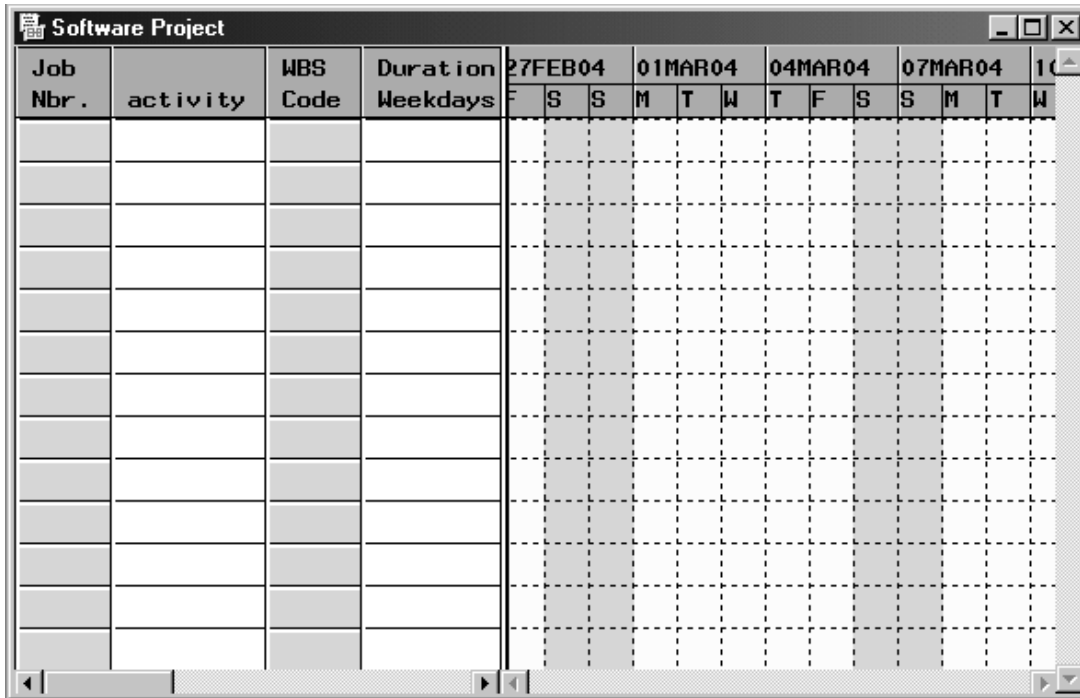
data softattr;
  length projattr $8. prateval $200.;
  input projattr prateval prateval;
  datalines;
;

proc pm data=software project=softattr
  date='1mar04'd interval=weekday
  projname='Software Project'
  out=softout1;
  act actid;
  succ succid;
  project pntid;

```

```
duration duration;
id activity;
run;
```

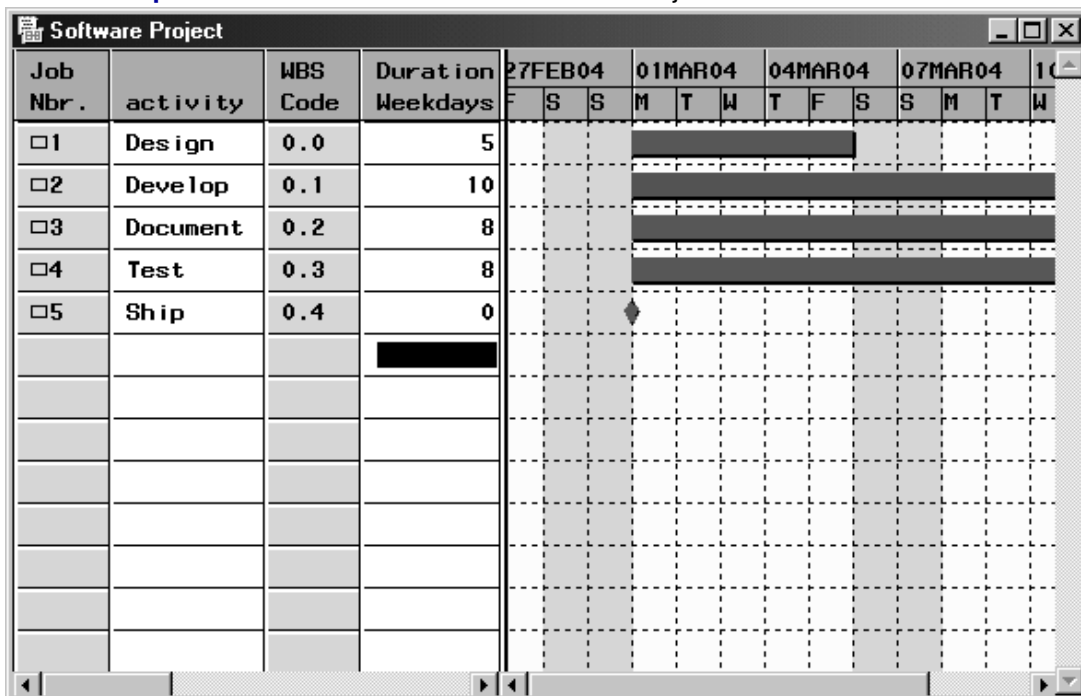
Output 3.1.1. Initial PM Window



In the PM Window, enter the following tasks with the corresponding durations in the Table View:

- Design 5
- Develop 10
- Document 8
- Test 8
- Ship 0

As each task is entered, the Schedule columns in the Table View are updated with the early and late start times, and the Early Schedule bars appear in the Gantt View. [Output 3.1.2](#) shows the PM Window after the five tasks have been entered. To view the Schedule columns, you can scroll the Table View to the right or use the **View** pull-down menu ([Figure 3.7](#)) to move the Schedule columns to the left.

Output 3.1.2. List of Tasks in the Software Project

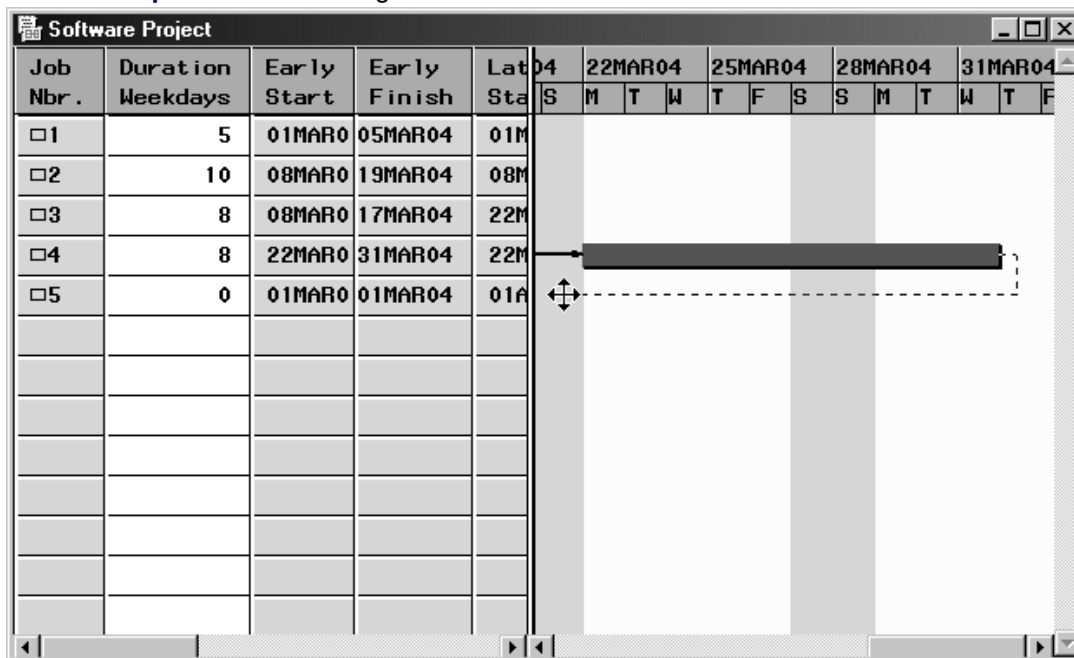
To enter precedence constraints between two activities, such as ‘Design’ and ‘Develop,’ draw an arc, using the left mouse button, from the end of the predecessor task to the beginning of the successor task. Use the Gantt View to enter the following precedence constraints:

```

Design  --> Develop
Design  --> Document
Develop --> Test
Test    --> Ship

```

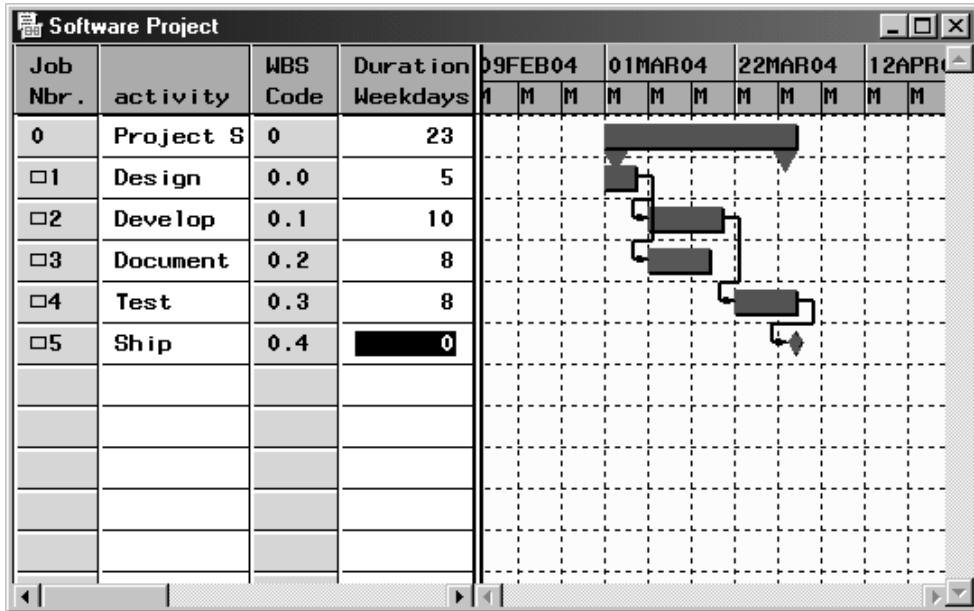
Output 3.1.3 shows the Software Project as the last precedence constraint is being drawn. Note that, in this view of the PM Window, the Schedule columns have been moved to the left, the grid lines in the Gantt View have been turned off (using the menu in Figure 3.12), and the Gantt View has been scrolled to the right to bring the end of the schedule bar for ‘Test’ into view.

Output 3.1.3. Drawing Precedence Constraints

To check the overall project status, you can bring the Project Summary task into view by selecting **Display Summary Task** from the **View** pull-down menu (Figure 3.7). Note that the project duration is 23 days. The Summary Task is indicated by vertical cones at the end of its schedule bar.

For the next few examples, the units used in the Gantt View are changed to “Weeks” using the **Axis** pop-up menu shown in Figure 3.13, the Summary Task is displayed at the top of the list of activities, and the Activity description columns are shown in the Table View. To save these window settings in the Project data set, select **Project->Preferences->Save** from the **Project** pull-down menu. The view of the project corresponding to these settings is shown in Output 3.1.4. You can end the interactive editing session by closing the window. All the activity and precedence information is saved in the output data set, SOFTOUT1, displayed in Output 3.1.5. Note the two sets of observations in this data set: the first contains all the schedule information for all the activities, and the second lists all the precedence relationships between activities.

Output 3.1.4. Project Schedule



Output 3.1.5. Schedule Data Set

```

Schedule Data Set

O      P P W      d      a      S
B      R R B      u      c      U
S      O O S      S r      P      t      C
-      P J J      A U a      A      i      C
T      N - C C C t      R      v      E
o Y      T D L O T C i      E      i      S
b P      I U E D I I o      N      t      S
s E      D R V E D D n      T      y      R

1 SCHEDULE . 23 0 0 0 . 23      Project Summary
2 SCHEDULE 0 . 1 0.0 1 . 5      Project Summary Design
3 SCHEDULE 0 . 1 0.1 2 . 10     Project Summary Develop
4 SCHEDULE 0 . 1 0.2 3 . 8      Project Summary Document
5 SCHEDULE 0 . 1 0.3 4 . 8      Project Summary Test
6 SCHEDULE 0 . 1 0.4 5 . 0      Project Summary Ship
7 LOGIC . . . 1 2 5      Design      Develop
8 LOGIC . . . 1 3 5      Design      Document
9 LOGIC . . . 2 4 10     Develop     Test
10 LOGIC . . . 4 5 8      Test       Ship

      A A      E      E      L      L
L L      E      -      L      T      F      E      L
G G      -      F      -      F      -      E      S      L      S
N N      S      I      S      I      F      F      S      -      S      -
D T      T      N      T      N      L      L      -      D      -      D
O L      A Y      A      I      A      I      O      O      A      E      A      E
b A      T P      R      S      R      S      A      A      S      S      S      S
s G      E E      T      H      T      H      T      T      C      C      C      C

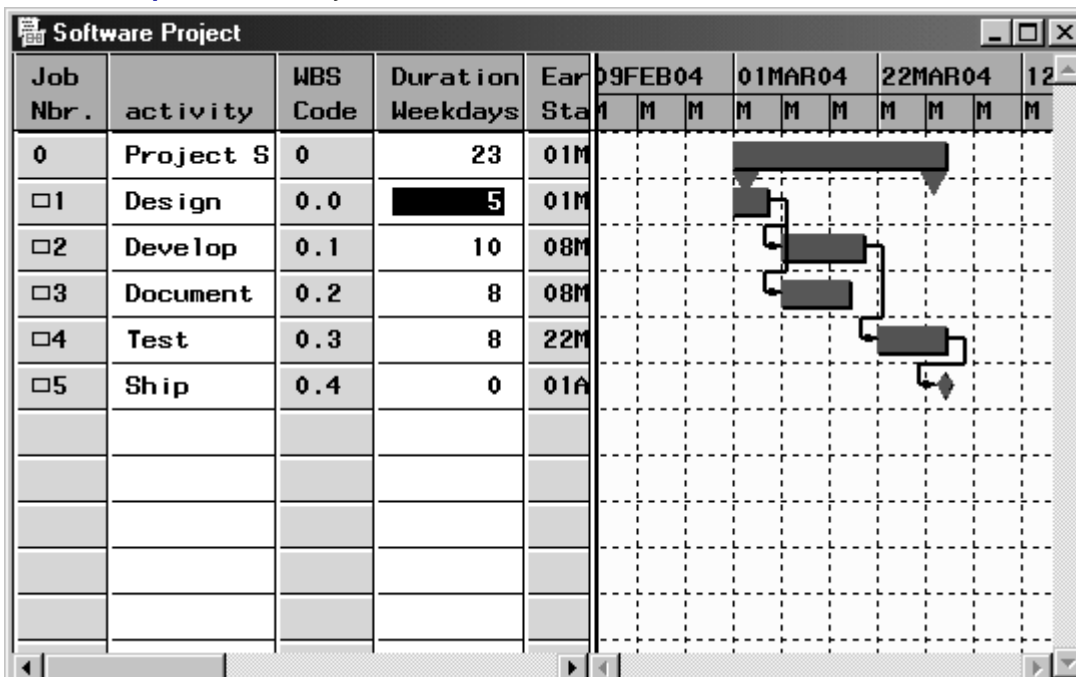
1 .      01MAR04 31MAR04 01MAR04 31MAR04 0 0 0 0 0 0
2 .      01MAR04 05MAR04 01MAR04 05MAR04 0 0 1 5 1 5
3 .      08MAR04 19MAR04 08MAR04 19MAR04 0 0 2 4 2 4
4 .      08MAR04 17MAR04 22MAR04 31MAR04 10 10 3 3 3 3
5 .      22MAR04 31MAR04 22MAR04 31MAR04 0 0 4 2 4 2
6 .      01APR04 01APR04 01APR04 01APR04 0 0 5 1 5 1
7 .      .      .      .      .      .      .      .      .      .
8 .      .      .      .      .      .      .      .      .      .
9 .      .      .      .      .      .      .      .      .      .
10 .      .      .      .      .      .      .      .      .      .
    
```

Example 3.2. Adding Subtasks to a Project

In this example, the output data set from [Example 3.1](#) is used as input to PROC PM. The following statements bring up the saved view of the project as shown in [Output 3.2.1](#). Note that this view is identical to the view saved in [Output 3.1.4](#).

```
proc pm data=softout1 project=softattr
      date='1mar04'd interval=weekday
      projname='Software Project'
      out=softout1;
  act actid;
  succ succid;
  project pntid;
  duration duration;
  id activity;
run;
```

Output 3.2.1. Project Schedule



In the invocation of PROC PM, the output data set name is the same as the input data set. Thus, it is possible to make changes to the Activity data set using PROC PM and then save the results back to the original data set.

In the current view of the Software Project, you want to add some subtasks to the 'Design' and 'Develop' tasks. Suppose that these two tasks are broken into two subtasks each, one for 'Module 1' and the other for 'Module 2.' Further, you want to remove the precedence constraint between the 'Design' and 'Develop' phases and add constraints between the respective modules. You can accomplish these tasks by making the following editing changes in the PM Window.

1. Use the Table View pop-up menu to add the following subtasks to 'Design':

Module 1: 5 days
 Module 2: 3 days

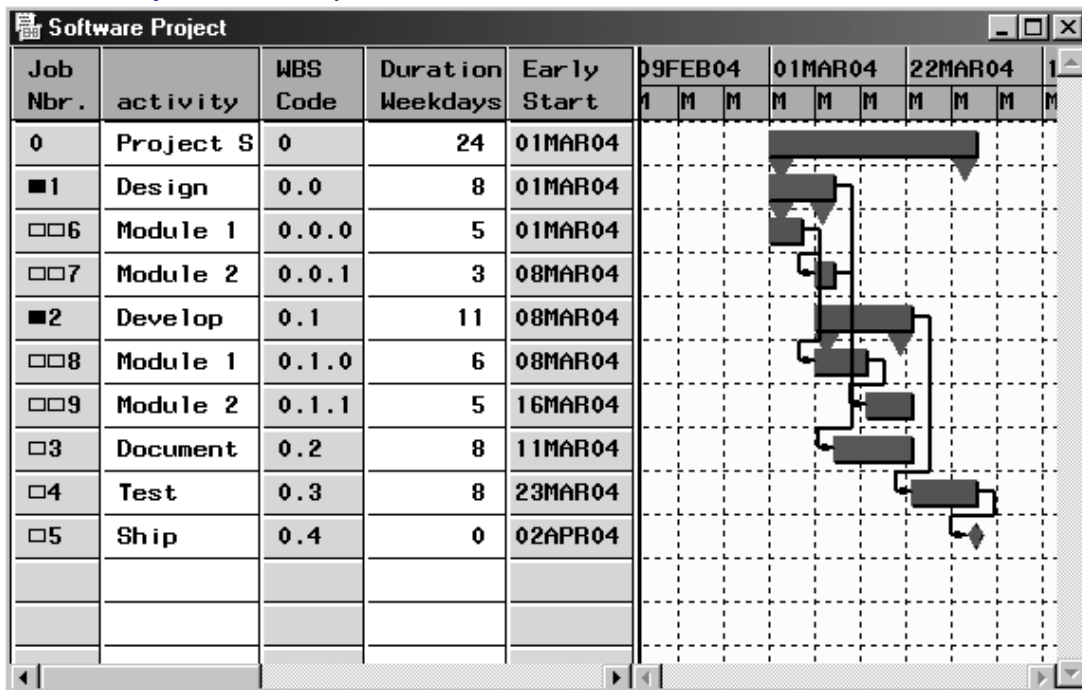
2. Add a link from 'Module 1' to 'Module 2.'
3. Use the Table View pop-up menu to add the following subtasks to 'Develop':

Module 1: 6 days
 Module 2: 5 days

4. Add a link from 'Module 1' to 'Module 2.'
5. Remove the link between the supertasks 'Design' and 'Develop' by clicking on the arc and selecting **Delete** from the pop-up menu.
6. Add a link from 'Module 1' under 'Design' to 'Module 1' under 'Develop.'
7. Add a link from 'Module 2' under 'Design' to 'Module 2' under 'Develop.'

The resulting project schedule is displayed in [Output 3.2.2](#) and saved in the data set SOFTOUT1. Note that the new project duration is 24 days.

Output 3.2.2. Project Schedule



Example 3.3. Saving and Comparing Baseline Schedules

This example shows you how to save a baseline schedule and use it for comparing new schedules. Recall that in [Example 3.2](#) the Schedule data are saved in the data set SOFTOUT1. Thus, the following invocation of PROC PM displays the Software project in its last saved state (as in [Output 3.2.2](#), but with the WBS codes filled in). At the end of the editing session, the schedule is saved in the data set SOFTOUT3.

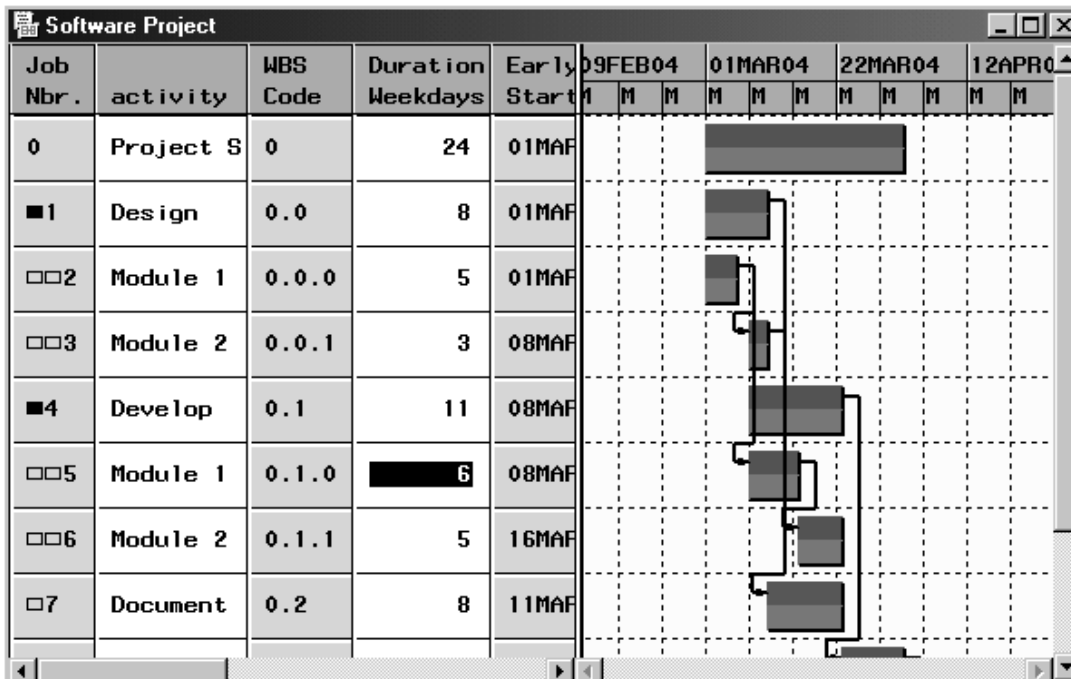
```

proc pm data=softout1 project=softattr
  date='1mar04'd interval=weekday
  projname='Software Project'
  out=softout3;
  act actid;
  succ succid;
  project pntid;
  duration duration;
  id activity;
run;

```

Use the **Edit -> Set Baseline** pull-down menu (Figure 3.27) to save the current Early Schedule as a Baseline Schedule. The resulting display is shown in Output 3.3.1. Note that the Gantt View now shows the Baseline Schedule, in addition to the Early Schedule. Also, the activities have been numbered to be sequential in the current view (see the “Renumbering the Activities” section on page 307).

Output 3.3.1. Using Baseline Schedules



The baseline schedule is useful in determining the effect of changes to the project on the schedule. For example, suppose there is a directive from the Director of your division that all the developers are required to attend a User Interface Standards Meeting before starting the development of Module 2. This meeting has been scheduled to start on March 15, 2004 and is expected to take 3 days. What is the effect of this directive on your project schedule?

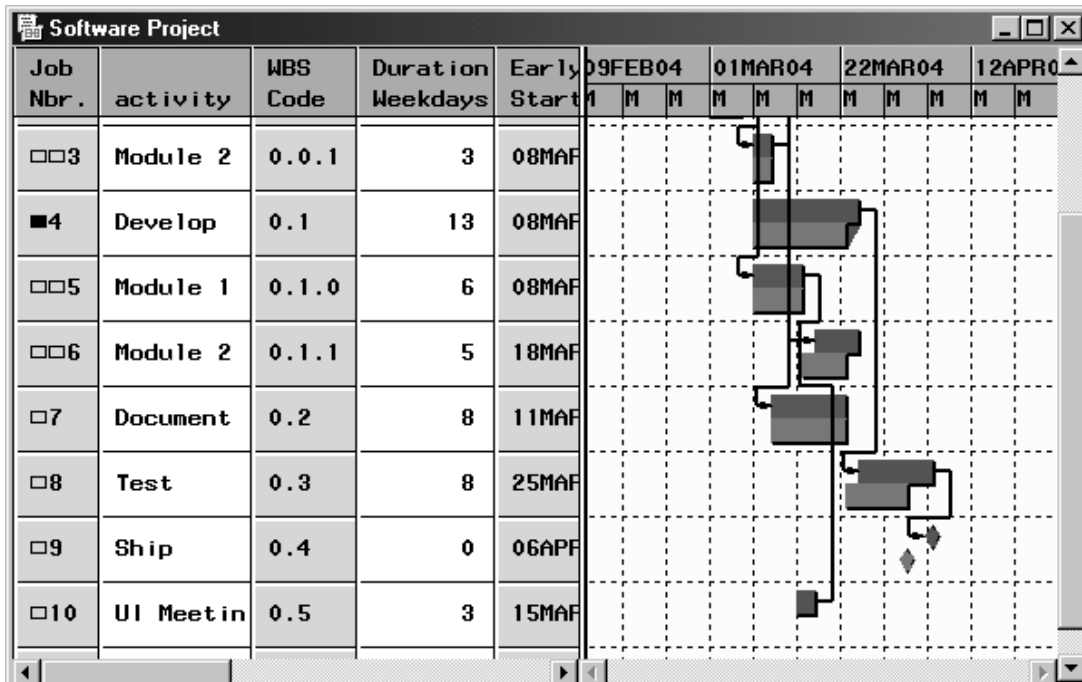
To see this, you can make the following changes in the PM Window:

1. Add a new task to the project by selecting **New Task** from the **Edit** pull-down menu.

2. To edit the newly entered task, you may need to scroll down.
3. Type in the name of the task: 'UI Meeting.' Set its duration to 3.
4. In the Gantt View, draw a link from this new task to Task 6 ('Module 2' under 'Develop.')
5. Also in the Gantt View, grab the task, 'UI Meeting,' using the left mouse button and drag it to the tick mark corresponding to 15Mar04.

The resulting view is shown in [Output 3.3.2](#). Note that the view may differ depending on the display parameters of your device. It is easy to see that, due to the 3-day meeting that is mandated, there is a delay in the project schedule (the project duration is now 26 days).

Output 3.3.2. Effect of UI Meeting on Schedule



You can get a complete picture of the effect on the schedule by examining all the Schedule columns that are shown in the Table View. [Output 3.3.3](#) shows the Schedule columns, the Baseline columns, and the Target Date and Type columns in the Table View. To obtain this view, some of the columns have been moved and the Baseline Schedule bars (in the Gantt View) have been hidden from the display.

Output 3.3.3. Table View Showing all Schedules

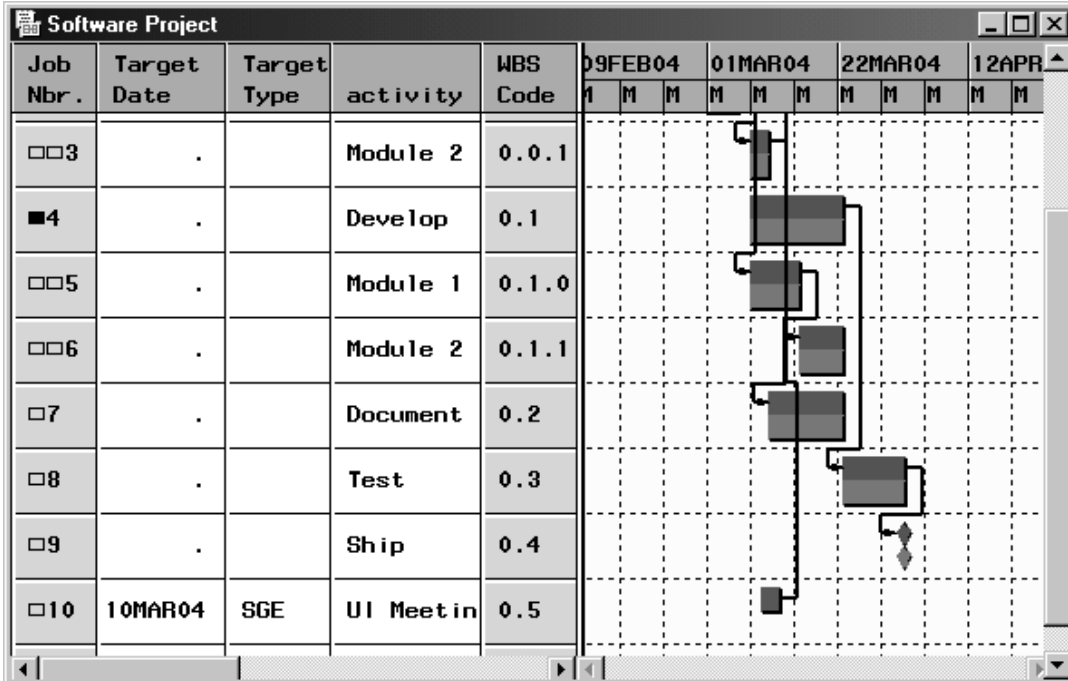
Job Nbr.	activ	Dura Week	Early Start	Early Finish	Late Start	Late Finish	Baselin Start	Baselin Finish	Target Date	Target Type
0	Proje	26	01MAR04	05APR04	03MAR04	05APR04	01MAR04	01APR04	.	
■1	Desig	8	01MAR04	10MAR04	03MAR04	17MAR04	01MAR04	10MAR04	.	
□□2	Modul	5	01MAR04	05MAR04	03MAR04	09MAR04	01MAR04	05MAR04	.	
□□3	Modul	3	08MAR04	10MAR04	15MAR04	17MAR04	08MAR04	10MAR04	.	
■4	Devel	13	08MAR04	24MAR04	10MAR04	24MAR04	08MAR04	22MAR04	.	
□□5	Modul	6	08MAR04	15MAR04	10MAR04	17MAR04	08MAR04	15MAR04	.	
□□6	Modul	5	18MAR04	24MAR04	18MAR04	24MAR04	16MAR04	22MAR04	.	
□7	Docum	8	11MAR04	22MAR04	25MAR04	05APR04	11MAR04	22MAR04	.	
□8	Test	8	25MAR04	05APR04	25MAR04	05APR04	23MAR04	01APR04	.	
□9	Ship	0	06APR04	06APR04	06APR04	06APR04	02APR04	02APR04	.	
□10	UI Me	3	15MAR04	17MAR04	15MAR04	17MAR04	.	.	15MAR04	SGE

If the project delay resulting from the UI Meeting is of concern, you may want to schedule the meeting on an earlier date. Suppose the revised start date of the meeting is March 10, 2004. To see the effect of the change, you can do the following:

1. Revert to the saved project preferences so that both the Table and the Gantt Views are visible.
2. Use the **View** pull-down menu to move the Target Date column to the left in the Table View.
3. Scroll down, if necessary, to bring the task 'UI Meeting' into view.
4. Change the Target Date column for this task to '10Mar04.'

The resulting view is displayed in [Output 3.3.4](#). Note that, as a result of this change, all the activities are back on schedule as the new schedule coincides with the saved baseline schedule. The last activity was defined after the baseline schedule had been saved in [Example 3.2](#); hence, there is no baseline schedule bar for this activity. You can use the **Fill Missing Baseline** selection from the pull-down menu shown in [Figure 3.26](#) to set the baseline schedule for the 'UI Meeting' to be the current early schedule.

Output 3.3.4. Editing Target Date



Example 3.4. Effect of Calendars

Continuing with the project scenario in the preceding examples, you want to explore other ways of shortening the project duration. One possible alternative is to work overtime. As the project manager, you would like to see the effect on the schedule if you change the calendar for all the development tasks to a six-day calendar.

Calendars are defined using the [Calendar](#) data set, as in the CPM procedure. Alternately, if you are using the PROJMAN application, you can use the [Calendars Window](#) to define a six-day calendar. This example defines a Calendar data set and invokes PROC PM as follows. Note that, in order to use calendars, the Activity data set needs to have a CALID variable, which is added in a simple DATA step.

```

/* Define a Calendar data set identifying */
/* Saturday as a workday */
data calendar;
  input calid calname $ _sat_ $;
  datalines;
1 Sixday WORKDAY
;

/* Add the CALID variable to the Activity data set */
data softout3;
  set softout3;
  calid=.;
run;

/* Use softout3 as the Activity data set and specify */
/* the preceding calendar data set. */

```

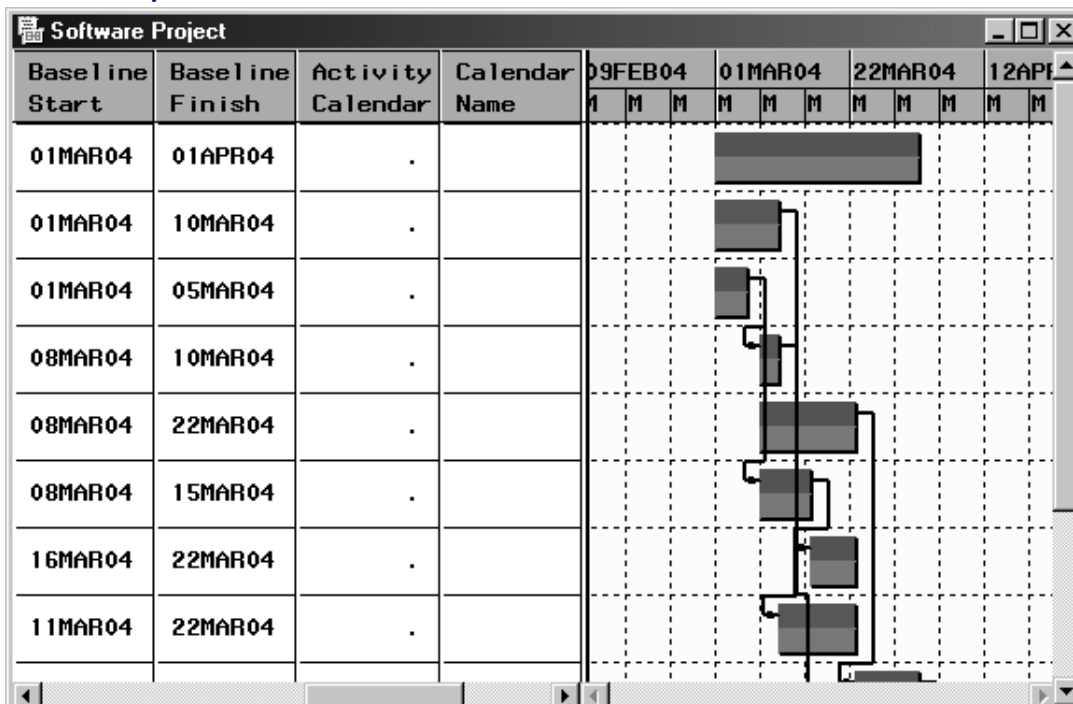
```

proc pm data=softout3 project=softattr
  calendar=calendar
  date='1mar04'd interval=weekday
  projname='Software Project'
  out=softout4;
act actid;
succ succid;
project pntid;
duration duration;
id activity;
calid calid;
run;

```

When the PM procedure initializes the PM Window, it attempts to restore all the display settings using the values in the Project data set, SOFTATTR. However, the new Activity data set has an extra variable, `calid`, which leads to two new columns in the Table View, one for the Activity Calendar (which displays the Calendar ID) and the other for the Calendar Name. These columns are added at the right end of the Table View and can be seen by scrolling to the right. The resulting view is displayed in [Output 3.4.1](#).

Output 3.4.1. Calendar Columns



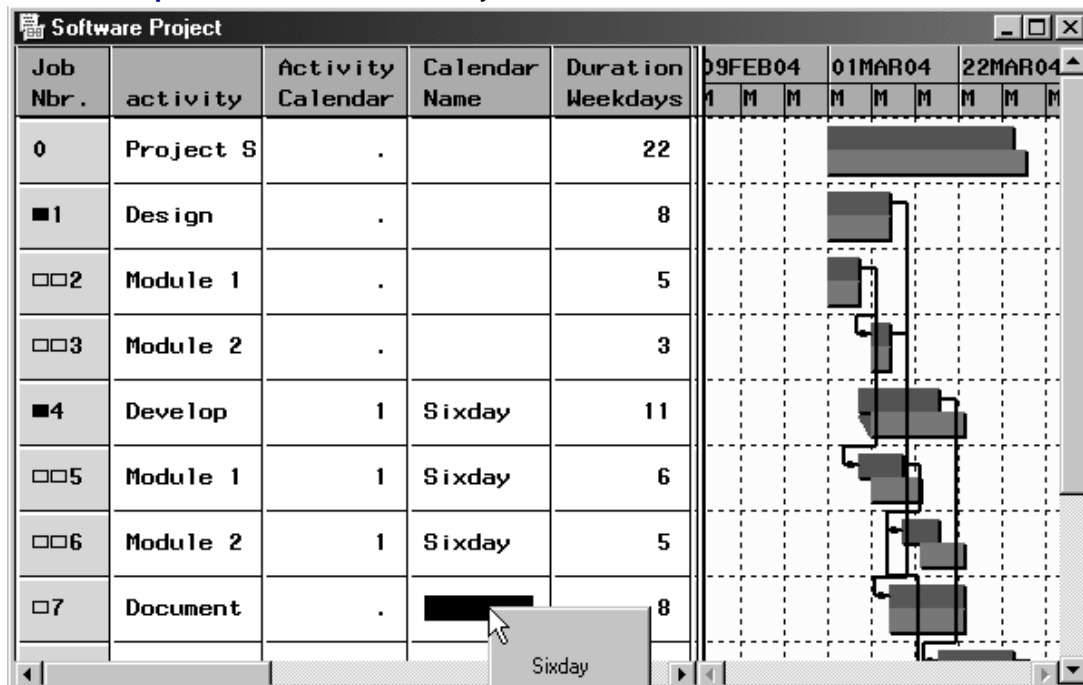
By default, all the activities are assumed to follow the standard five-day calendar. Now, you want to change the calendar for the supertask ‘Develop’ and all its subtasks to be the six-day calendar defined in the data set CALENDAR. Note that, in the calendar definition, it is sufficient to specify that Saturday is a working day. All the other days of the week default to the default calendar’s work pattern; see the “[Default Calendar](#)” section on page 99 in [Chapter 2, “The CPM Procedure.”](#)

To facilitate the editing of the calendar values and to see the effect on the project du-

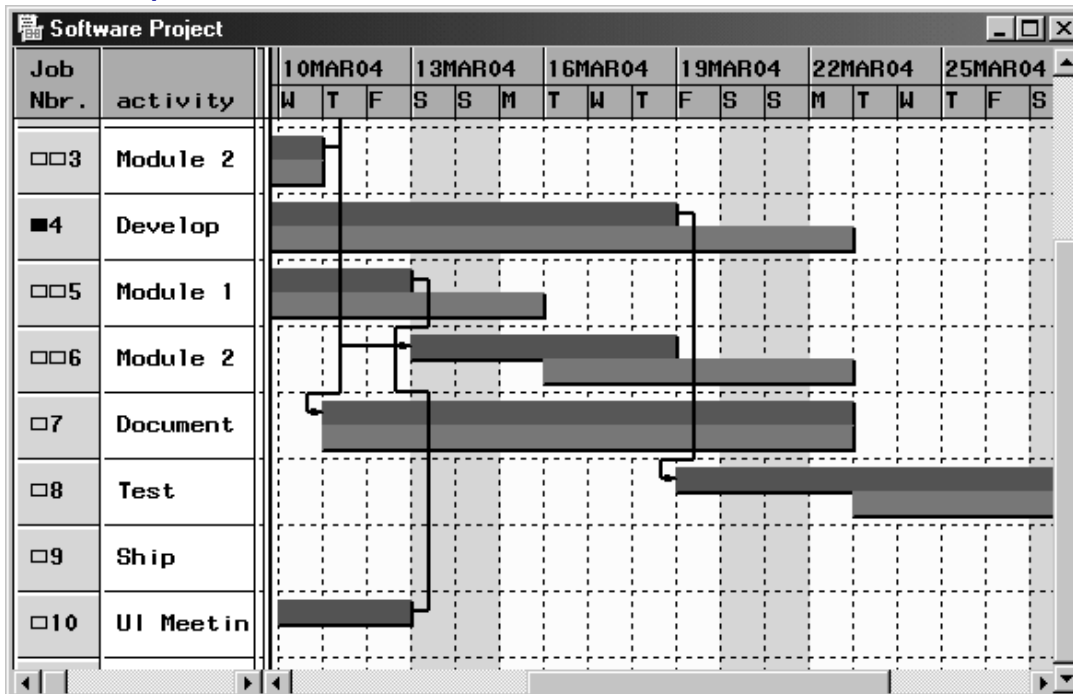
ration, reorder the columns (using the left mouse to drag the columns in the Table Header) to display the activity, Activity Calendar, Calendar Name, and Duration columns in the Table View. You may need to move the dividing line between the Table and Gantt Views.

You can enter the Calendar values by typing the number 1 in the Activity Calendar column or the value ‘Sixday’ in the Calendar Name column. You can also use the Calendar pop-up menu in one of the calendar columns to select the desired calendar (see [Output 3.4.2](#)). Note that the project duration has reduced to 22 days as a result of the six-day calendar.

Output 3.4.2. Effect of Six-Day Calendar



To see the effect on the individual activities, change the units to “Days” in the Gantt View and enlarge the Gantt View, as shown in [Output 3.4.3](#).

Output 3.4.3. Gantt View of Calendar Effect

Example 3.5. Defining Resources

In all the preceding examples, it was assumed that you had enough resources to work on the different tasks. Unfortunately, as a project manager you need to schedule your project using the limited set of resources available to you. In this example, you will assign some project resources and schedule the project subject to resource constraints.

In order to assign resources to the tasks, you need to add resource variables to the Activity data set as well as define a resource availability ([Resource](#)) data set.

Suppose that the resources that you are interested in are Tester and Programmer. The following statements set up the project data needed to perform resource-constrained scheduling with PROC PM using the output data produced in [Example 3.4](#).

```

/* Define a Resource data set specifying */
/* 1 Tester and 1 Programmer as the      */
/* available resources                    */
data resources;
    input _date_ & date7. Tester Programmer;
    datalines;
01jan04 1 1
;

/* Add the resource variables Tester and */
/* Programmer to the Activity data set   */
/* (the output data set saved in last example) */
data softout4;
    set softout4;
    Tester=.;

```

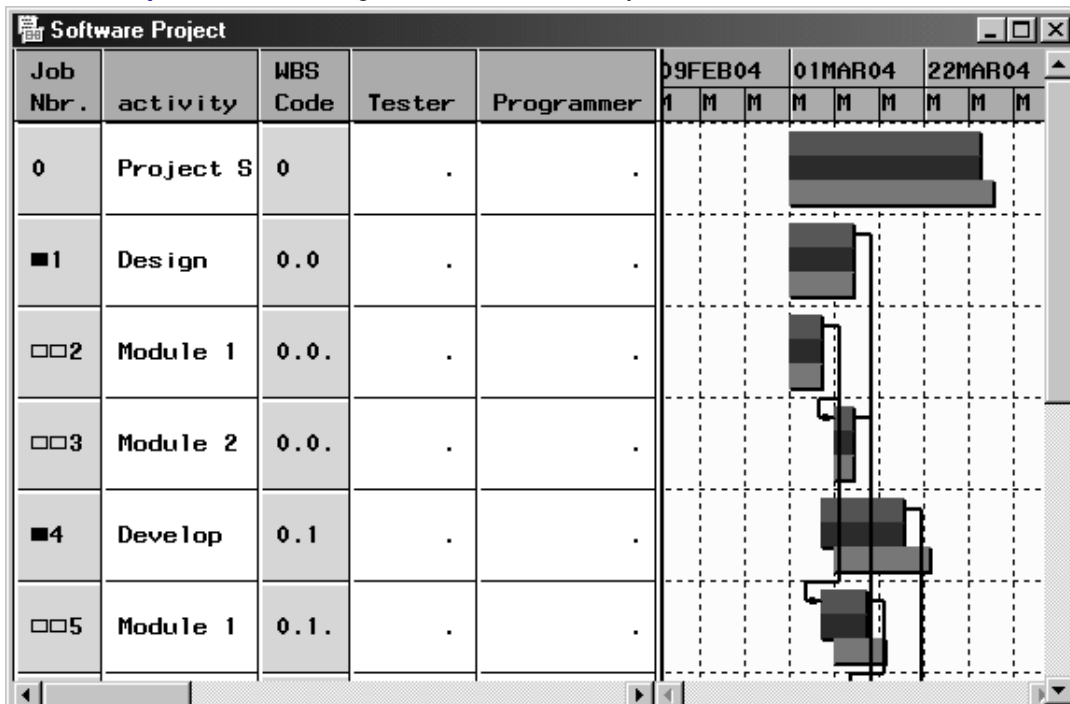
```

Programmer=.;
run;

/* Use softout4 as the Activity data set and */
/* specify the preceding Resource data set. */
/* Save the schedule in softout5. */
proc pm data=softout4 project=softattr
calendar=calendar
resourcein=resources
date='1mar04'd interval=weekday
projname=' Software Project'
out=softout5;
act actid;
succ succid;
project pntid;
duration duration;
id activity;
calid calid;
resource Tester Programmer / per=_date_;
run;

```

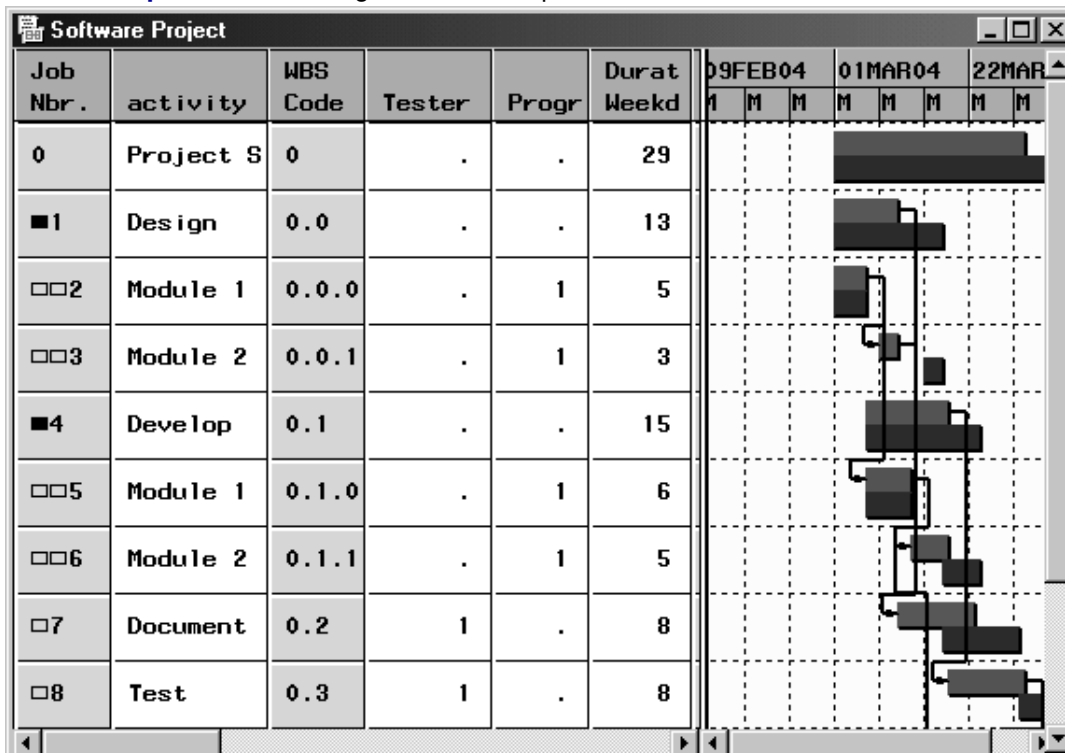
Output 3.5.1. Adding Resources to the Project



Output 3.5.1 shows the Table and Gantt Views of the project after rearranging some of the columns and moving the dividing line to show the resource columns. The Resource Schedule bars are also brought into display by clicking the right mouse button over the background in the Gantt View and selecting **Resource Schedule**. The Resource Schedule bar is shown between the Early Schedule bar and the Baseline Schedule bar. Note that the resource schedule coincides with the early schedule because no resource requirements have been specified for either of the two resources.

You can now use the Table View to enter the resource requirements for each task. Set the requirement for the resource **Tester** to '1' for the tasks 'Document' and 'Test,' and the requirement for the resource **Programmer** to '1' for the tasks numbered '2,' '3,' '5,' and '6.' The resulting schedule is displayed in [Output 3.5.2](#). In this view, the baseline schedule is not displayed. You can see that several of the tasks have been delayed, resulting in lengthening the project duration to 29 weekdays.

Output 3.5.2. Editing Resource Requirements



You can set the resource-constrained schedule as a baseline to do some “what-if” analysis. For example, suppose you would like to determine the effect of adding another programmer to the project. In order to change the resource availability, you need to save the current project, edit the Resource availability data set to add another programmer, and then reinvoke the PM procedure.

First, in the PM Window displayed in [Output 3.5.2](#), do the following:

1. Re-display the Baseline Schedule bar.
2. Use the **Replace Baseline** selection from the **Edit** pull-down menu to select the Resource Schedule as the new baseline schedule.
3. Save the project preferences.
4. Close the PM Window.

Reinvoke PROC PM after defining a new resource availability:

```
/* Change the resource availability for Programmer to 2 */
data resources;
    input _date_ & date7. Tester Programmer;
```

```

datalines;
01jan04 1 2
;

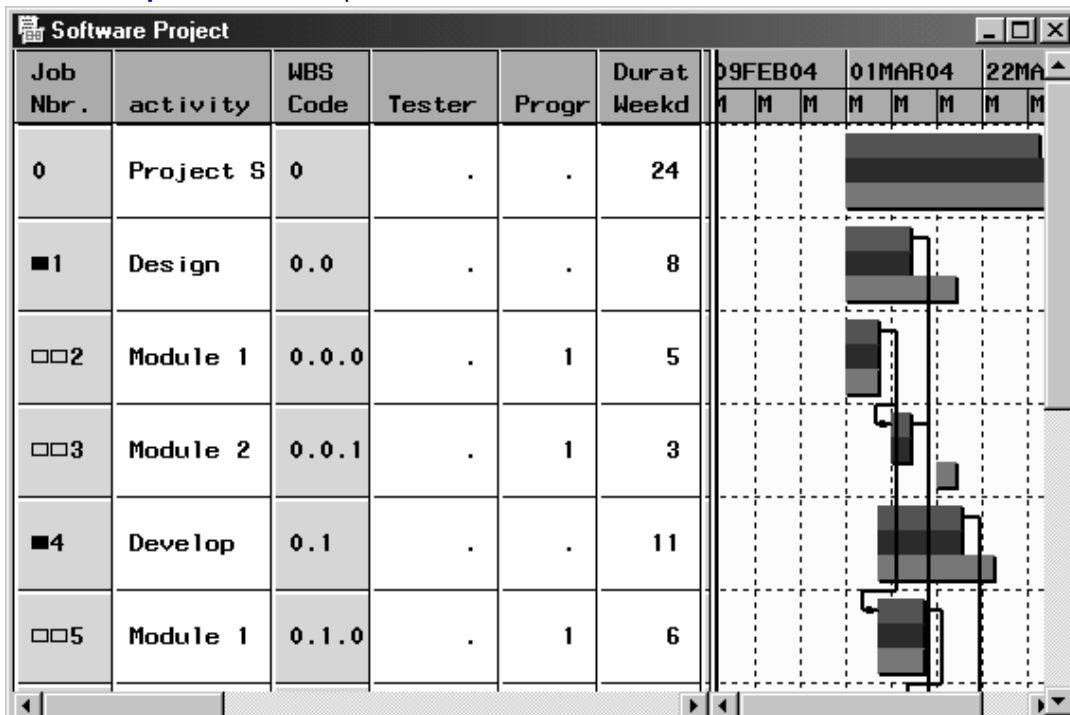
/* Use softout5 as the Activity data set and specify */
/* the preceding Resource data set. */
/* Save the schedule back to softout5. */
proc pm data=softout5 project=softattr
calendar=calendar
resourcein=resources
date='1mar04'd interval=weekday
projname=' Software Project'
out=softout5;

act actid;
succ succid;
project pntid;
duration duration;
id activity;
calid calid;
resource Tester Programmer / per=_date_;
run;

```

Using the new resource availability, you reduced the project duration by five days. The resulting schedule is displayed in [Output 3.5.3](#), which also shows the baseline schedule corresponding to the earlier resource availability data set.

Output 3.5.3. Comparison of Two Resource Schedules



Example 3.6. Editing Progress

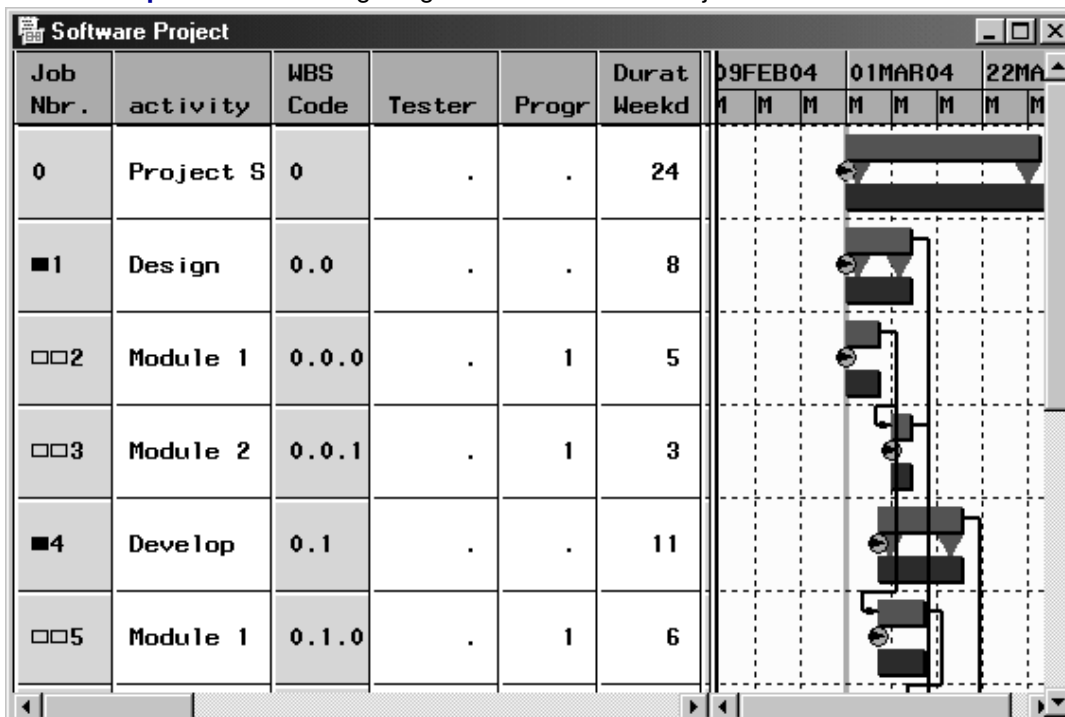
Once a project plan has been established and the project is under way, a major part of a project manager's responsibility is to monitor the project as it progresses. This example uses the PM Window to add progress information to the project and discusses some of the related editing functions.

In the final window of [Example 3.5](#) (shown in [Output 3.5.3](#)), do the following:

1. Delete the baseline schedule using the **Edit** pull-down menu.
2. From the **Edit** pull-down menu, select **Add Progress**.

The resulting display is shown in [Output 3.6.1](#). The Gantt View now shows the Actual Schedule bar between the Early Schedule bar and the Resource Schedule bar. It also displays a Timenow Line. Since no progress information has been entered, the Timenow Line is drawn at the beginning of the project and all the Actual Schedule bars show only a handle that can be used to drag progress for a particular task.

Output 3.6.1. Adding Progress Information to Project



You can enter progress information in several ways:

- Drag the Timenow Line to update progress information for several tasks at once. The actual start and finish times (until the Timenow date) are set assuming that the tasks follow the resource-constrained schedule. (If there are no resource constraints, the tasks are assumed to follow the early schedule.)
- Use the handle on the Actual Schedule bar for a given task to drag the progress bar using the left mouse button.

- Bring the Progress columns into view in the Table View and edit one of the Progress columns.

As an example, use the left mouse button to drag the Timenow Line to the tick mark corresponding to 15MAR04. The resulting window (after reordering and resizing some columns and scrolling the Gantt View) is shown in [Output 3.6.2](#).

Output 3.6.2. Moving the Timenow Line

Job Nbr.	Activity	Actual Start	Actual Finish	Perc Comp	Rem. Dura	Act Dur	04	01MAR04	22MAR04
0	Projec	01MAR04	.	42	14	.	M	M	M
1	Design	01MAR04	10MAR04	100	0	8	M	M	M
2	Module	01MAR04	05MAR04	100	0	5	M	M	M
3	Module	08MAR04	10MAR04	100	0	3	M	M	M
4	Develo	06MAR04	.	64	4	.	M	M	M
5	Module	06MAR04	12MAR04	100	0	6	M	M	M

Note that some of the activities are completed while others are still in progress. If the project data are saved at this point, the Schedule data set will have all the Progress variables (A_START, A_FINISH, PCT_COMP, and REM_DUR). However, for the PM procedure to be able to recapture the exact state of the schedule as it was saved, it also needs to know the value of TIMENOW when the project data was last saved. This value (15Mar04 for the current example) is saved as a macro variable named TIMENOW (see the “TIMENOW Macro Variable” section on page 309).

To see how the Actual information can be used from one invocation of PROC PM to the other, save the project as displayed in [Output 3.6.2](#) and then reinvoke PROC PM to continue editing the progress information. Note that if you are using the PROJMAN application, the value of TIMENOW is automatically saved by the application and used in subsequent editing of the project.

Recall from the last invocation of PROC PM that the data are saved in the data set SOFTOUT5. To use the saved progress information, invoke PROC PM as follows:

```

/* Use softout5 as the Activity data set and specify */
/* the Resource data set defined in the last example.*/
/* Save the schedule in softout6.                      */

```

```

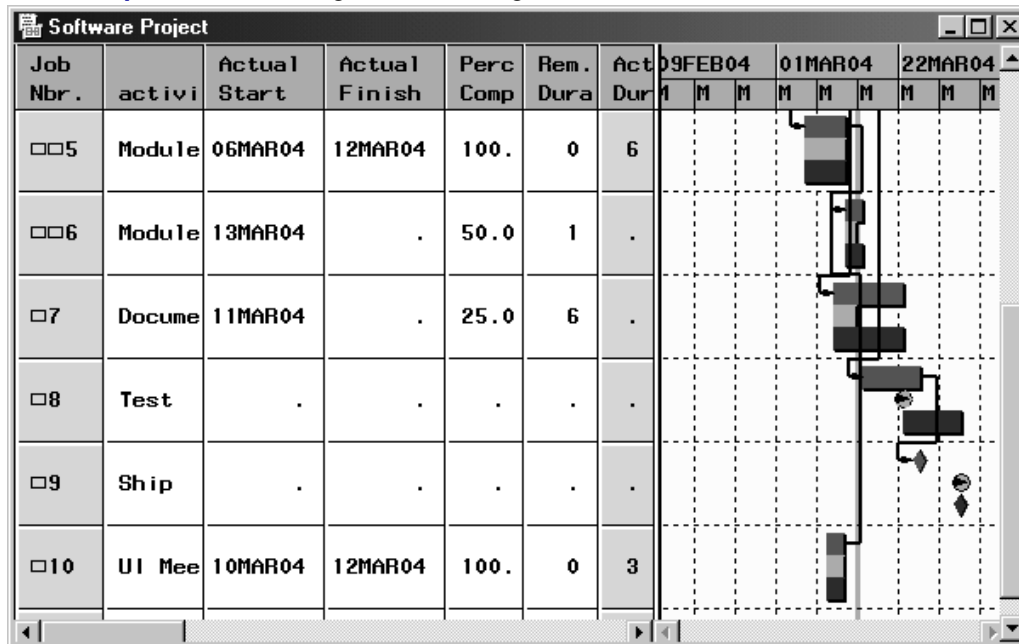
proc pm data=softout5 project=softattr
    calendar=calendar
    resourcein=resources
    date='1mar04'd interval=weekday
    projname='Software Project'
    out=softout6;
act actid;
succ succid;
project pntid;
duration duration;
id activity;
calid calid;
/* Use the ACTUAL statement to specify the Progress */
/* variables and the value of TIMENOW saved from the*/
/* previous invocation */
actual / as=a_start af=a_finish
    remdur=rem_dur pctcomp=pct_comp
    timenow=&timenow;
resource Tester Programmer / per=_date_;
run;

```

The preceding program displays the PM Window for the updated Software project. Now use the Table View to edit some of the Progress columns. To do so, you can either scroll to the Progress Columns or move these columns to the left in the Table View using the appropriate selection from the **View** pull-down menu (Figure 3.9).

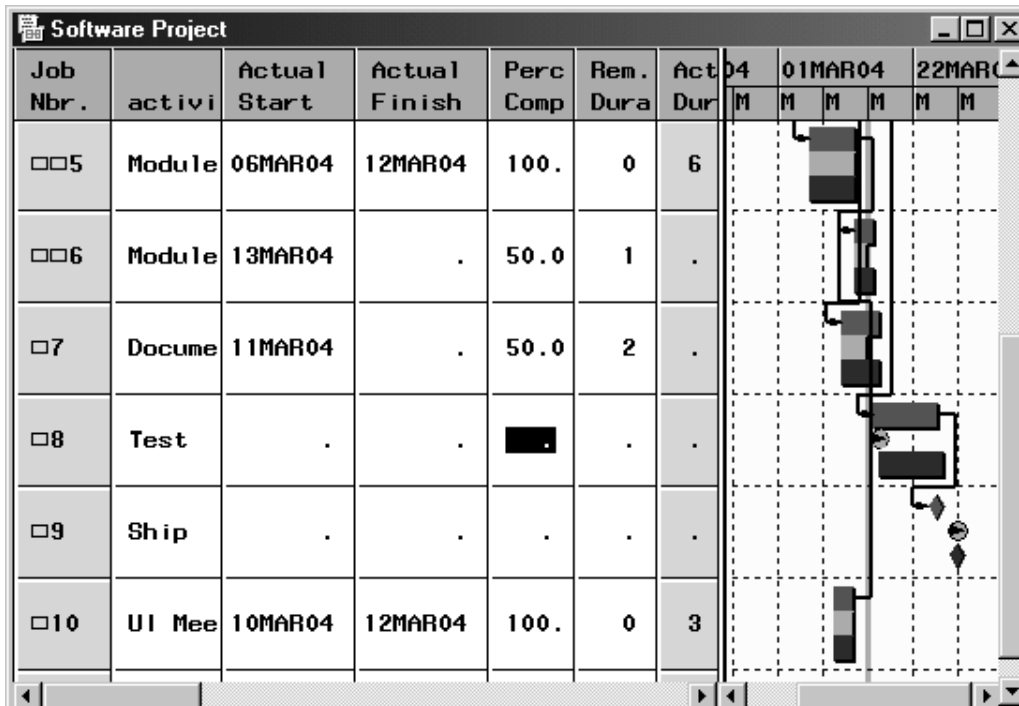
Task number 6 ('Module 2' under 'Develop') has a Remaining Duration value of 4. At this point in time, you may notice that you have misjudged the amount of work involved and that you need only one more day to finish the task. Enter 1 in the Remaining Duration column. This editing change immediately causes the Percent Complete column to update to 50, indicating that 50% of the work is completed. The resulting effect on the project schedule is shown in [Output 3.6.3](#) (the window has been scrolled down to enable the second half of the project to be visible). Note that reducing the duration of the 'Module' task did not affect the project end date. The duration of the project is still 24 days. Studying the schedule of the 'Document' and 'Test' tasks, you notice that the delay to the project is caused by the fact that the resource-constrained schedule of the task 'Test' is delayed due to resource constraints.

Output 3.6.3. Editing the Remaining Duration Column



In addition to revising the progress information for 'Module 2,' you also realize that the 'Document' task is 50% complete as of the Timenow date. Edit the Percent Complete column in the Table View, changing the value from 25.0 to 50.0. Immediately, the Remaining Duration column changes to 2. The resulting window is shown in [Output 3.6.4](#). The project end date (for the resource-constrained schedule) is 28Mar04. Thus, the project duration is now reduced to 20 days.

Output 3.6.4. Editing the Percent Complete Column



Chapter 4

The Microsoft Project Conversion Macros (Experimental)

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Chapter 4

The Microsoft Project Conversion Macros (Experimental)

Overview

The SAS macro %MSPTOSAS is available for converting Microsoft Project data to a form that is readable by the PM procedure. The %MSPTOSAS macro converts Microsoft Project 98 (and later) data. The macro generates the necessary SAS data sets, determines the values of the relevant options, and enables you to invoke an instance of the PM procedure with the converted project data. Execution of this macro requires SAS/ACCESS software.

NOTE: Microsoft Project[®] 98 , 2000, 2002, 2003, and Microsoft Project[®] Server are registered trademarks of Microsoft Corporation.

%MSPTOSAS

%MSPTOSAS is a SAS macro that converts Microsoft Project data saved in MDB format to a form that is readable by the PM procedure. The %MSPTOSAS macro has four arguments: one that specifies the location of the MDB file, one that specifies the location of the directory for storing the SAS data sets, one optional numeric argument that controls the mode of the PM procedure invocation, and an argument that specifies which version of Microsoft Project the MDB file corresponds to.

The following SAS data sets are generated by the %MSPTOSAS conversion macro:

- Activity data set: activity
- Calendar data set: calendar
- Holiday data set: holiday
- Workday data set: workday
- Resource data set: resource
- Schedule data set: schedule
- Preferences data set: prefs

The %MSPTOSAS macro converts the hierarchical relationships, precedence relationships, time constraints, resource availabilities, resource requirements, project calendars, task calendars, resource calendars, holiday information, work-shift information, actual start and finish times, and baseline start and finish times. In addition, the notes and cost fields are extracted and stored in the activity data set.

Note: In order to retain the values of the options used to invoke the PM procedure, you need to save the preferences by choosing **Preferences -> Save** from the **Project** menu.

%MSPTOSAS Macro Parameters

```
%MSPTOSAS (MDBFILE=mdbfile, LIBRARY=library,
            VIEWPM=indicator, VERSION=version,
            DBMS=identifier, SERVER=pc-server-hostname,
            PORT=port-number);
```

General Project Parameters

MDBFILE=*mdbfile*

specifies the location of the MDB file. It can be either a SAS file reference or a physical filename. This parameter is required; there is no default value.

LIBRARY=*library*

specifies the location of the directory for storing the SAS data sets. This parameter can be either a SAS libref or a physical path. The default value is the work library.

VIEWPM=*indicator*

controls the mode of the PM procedure invocation. The value VIEWPM=1 invokes the PM procedure in interactive mode, and the value VIEWPM=0 invokes the PM procedure in non-interactive mode. This parameter is optional; the default value is 1.

VERSION=*version*

specifies the Microsoft Project version of the MDB file. You need to know the Microsoft Project version of the MDB file to be converted and set this parameter accordingly. For example, to convert an MDB file from Microsoft Project 98, you need to set VERSION=98. Other recognizable versions are 2000, 2002 and 2003. This parameter is required; there is no default value.

Miscellaneous Parameter

The following statements are available to establish a connection from SAS running on UNIX to a PC server when you are importing a table from a Microsoft Access database.

DBMS=*identifier*

specifies the type of data to import. In this case, you need to specify the value DBMS=accesscs.

SERVER=*pc-server-hostname*

specifies the computer name of the PC on which you started the PC files server. This name is required by UNIX users to connect to this server machine and is reflected on the server control panel. This hostname can be specified as a simple computer name (wxp320), a fully qualified network name (wxp320.domain.com), or an IP address.

PORT=*port-number*

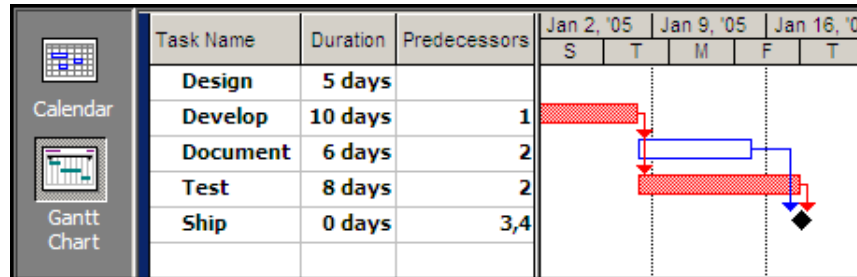
specifies the port or service name that the SAS PC files server is listening to on the PC. The default value is 8621 and needs to be specified.

Examples

Example 4.1. Simple %MSPTOSAS Conversion

This example illustrates the use of the %MSPTOSAS macro. Consider the following project created in Microsoft Project 98, as shown in Figure 4.1.

Figure 4.1. Microsoft Project Window

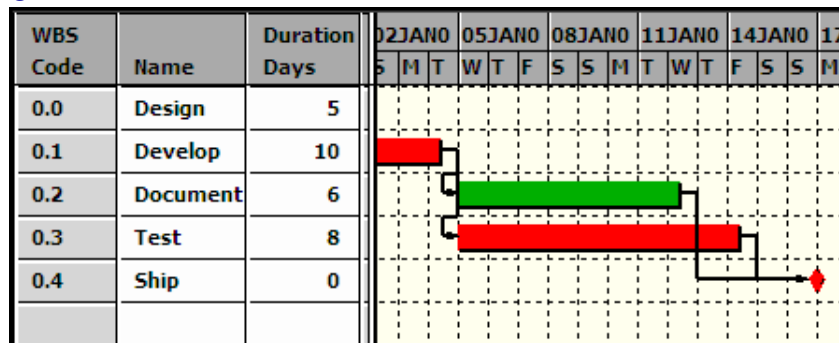


You can use the following call to the %MSPTOSAS macro to convert the MS Project file and view it in the PROC PM window:

```
%msptosas (mdbfile=c:\myfiles\Ex1msp98.mdb,
           library=PMmacros, version=98)
```

The PM window containing the preceding project is displayed in Figure 4.2.

Figure 4.2. PM Window



Example 4.2. Converting Multiple Projects

This example illustrates the ability of the %MSPTOSAS macro to convert multiple projects saved in one database file to a SAS file readable by PROC PM. Assume you have two projects, named Software Project and Marketing Project, in the Microsoft

Appendix

The SAS macros %MDBTOPM and %MP2KTOPM are used for converting MDB files saved by Microsoft Project 98 and Microsoft Project 2000 (and later), respectively. These two macros are wrapped into the macro %MSPTOSAS. The macros generate the necessary SAS data sets, determine the values of the relevant options, and invoke an instance of the PM procedure with the converted project data. Execution of these macros requires SAS/ACCESS software.

%MDBTOPM

%MDBTOPM is a SAS macro that converts Microsoft Project 98 data saved in MDB format to a form that is readable by the PM procedure. The %MDBTOPM macro has two arguments: one that specifies the location of the .MDB file, and another that specifies the location of the directory for storing the SAS data sets.

The following SAS data sets are generated by the %MDBTOPM conversion macro:

- Activity data set: activity
- Calendar data set: calendar
- Holiday data set: holiday
- Workday data set: workday
- Resource data set: resource
- Preferences data set: prefs

The %MDBTOPM macro converts the hierarchical relationships, precedence constraints, time constraints, resource availabilities, resource requirements, project calendars, resource calendars, holiday information, work-shift information, actual start and finish times, and baseline start and finish times. In addition, the notes and cost fields are extracted and stored in the Activity data set.

Note: In order to retain the values of the options used to invoke the PM procedure, you need to save the preferences by choosing **Preferences -> Save** from the **Project** menu.

%MDBTOPM Macro Parameters

%MDBTOPM (*MDBPATH=mdbpath, LIBPATH=libpath*);

MDBPATH=*mdbpath*

specifies the location of the MDB file. This parameter is required; there is no default value.

LIBPATH=*libpath*

specifies the location of the directory for storing the SAS data sets. This parameter is required; there is no default value.

%MP2KTOPM

%MP2KTOPM is a SAS macro that converts Microsoft Project 2000 data saved in MDB format to a form that is readable by the PM procedure. The %MP2KTOPM macro has three arguments: one that specifies the location of the MDB file, one that specifies the location of the directory for storing the SAS data sets, and an optional numeric argument that controls the mode of the PM procedure invocation. A nonzero value invokes the PM procedure in the default interactive mode, and a value of zero invokes the procedure in non-interactive mode.

The following SAS data sets are generated by the %MP2KTOPM conversion macro:

- Activity data set: activity
- Calendar data set: calendar
- Holiday data set: holiday
- Workday data set: workday
- Resource data set: resource
- Preferences data set: prefs

The %MP2KTOPM macro converts the hierarchical relationships, precedence relationships, time constraints, resource availabilities, resource requirements, project calendars, resource calendars, holiday information, work-shift information, actual start and finish times, and baseline start and finish times. In addition, the notes and cost fields are extracted and stored in the Activity data set.

Note: In order to retain the values of the options used to invoke the PM procedure, you need to save the preferences by choosing **Preferences -> Save** from the **Project** menu.

%MP2KTOPM Macro Parameters

%MP2KTOPM (*MDBPATH=mdbpath*, *LIBPATH=libpath*, *DISPLAY=display*);

MDBPATH=*mdbpath*

specifies the location of the MDB file. This parameter is required; there is no default value.

LIBPATH=*libpath*

specifies the location of the directory for storing the SAS data sets. This parameter is required; there is no default value.

DISPLAY=*indicator*

controls the mode of the PM procedure invocation. The value DISPLAY=1 invokes the PM procedure in interactive mode, and the value DISPLAY=0 invokes the PM procedure in non-interactive mode. This parameter is optional; the default value is 1.

Chapter 5

The DTREE Procedure

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Chapter 5

The DTREE Procedure

Overview

The DTREE procedure in SAS/OR software is an interactive procedure for decision analysis. The procedure interprets a decision problem represented in SAS data sets, finds the optimal decisions, and plots on a line printer or a graphics device the decision tree showing the optimal decisions.

To use PROC DTREE you first construct a decision model to represent your problem. This model, called a *generic decision tree model*, is made up of *stages*.^{*} Every stage has a *stage name*, which identifies the stage, as well as a *type*, which specifies the type of the stage. There are three types of stages: decision stages, chance stages, and end stages. In addition, every stage has possible *outcomes*.

A *decision stage* represents a particular decision you have to make. The outcomes of a decision stage are the possible *alternatives* (or *actions*) of the decision. A *chance stage* represents an *uncertain factor* in the decision problem (a statistician might call it a *random variable*; here it is called an *uncertainty*). The outcomes of a chance stage are *events*, one of which will occur according to a given probability distribution. An *end stage* terminates a particular *scenario* (a sequence of alternatives and events). It is not necessary to include an end stage in your model; the DTREE procedure adds an end stage to your model if one is needed.

Each outcome of a decision or chance stage also has several attributes, an *outcome name* to identify the outcome, a *reward* to give the instant reward of the outcome, and a *successor* to specify the name of the stage that comes next when this outcome is realized. For chance stages, a *probability* attribute is also needed. It gives the relative likelihood of this outcome. Every decision stage should have at least two alternatives, and every chance stage should have at least two events. Probabilities of events for a chance stage *must* sum to 1. End stages do not have any outcomes.

The structure of a decision model is given in the `STAGEIN=` data set. It contains the stage name, the type, and the attributes (except probability) of all outcomes for each stage in your model. You can specify each stage in one observation or across several observations. If a diagrammatic representation of a decision problem is all you want, you probably do not need any other data sets.

If you want to evaluate and analyze your decision problem, you need another SAS data set, called the `PROBIN=` data set. This data set describes the probabilities or conditional probabilities for every event in your model. Each observation in the data set contains a list of given conditions (list of outcomes), if there are any, and at least one combination of event and probability. Each event and probability combination identifies the probability that the event occurs given that all the outcomes specified

^{*}The stages are often referred to as *variables* in many decision analysis articles.

in the list occur. If no conditions are given, then the probabilities are unconditional probabilities.

The third data set, called the `PAYOFFS=` data set, contains the value of each possible scenario. You can specify one or more scenarios and the associated values in one observation. If the `PAYOFFS=` data set is omitted, the DTREE procedure assumes that all values are zero and uses rewards for outcomes to evaluate the decision problem.

You can use PROC DTREE to display, evaluate, and analyze your decision problem. In the `PROC DTREE` statement, you specify input data sets and other options. A `VARIABLES` statement identifies the variables in the input data set that describe the model. This statement can be used only once and must appear immediately after the `PROC DTREE` statement. The `EVALUATE` statement evaluates the decision tree. You can display the optimal decisions by using the `SUMMARY` statement, or you can plot the complete tree with the `TREEPLOT` statement. Finally, you can also associate HTML pages with decision tree nodes and create Web-enabled decision tree diagrams.

It is also possible to interactively modify some attributes of your model with the `MODIFY` statement and to change the order of decisions by using the `MOVE` statement. Before making any changes to the model, you should save the current model with the `SAVE` statement so that you can call it back later by using the `RECALL` statement. Questions about the value of perfect information or the value of perfect control are answered using the `VPI` and `VPC` statements. Moreover, any options that can be specified in the `PROC DTREE` statement can be reset at any time with the `RESET` statement.

All statements can appear in any order and can be used as many times as desired with one exception. The `RECALL` statement must be preceded by at least one `SAVE` statement. In addition, only one model can be saved at any time; the `SAVE` statement overwrites the previously saved model. Finally, you can use the `QUIT` statement to stop processing and exit the procedure.

The DTREE procedure produces one output data set. The `IMAGEMAP=` data set contains the outline coordinates for the nodes in the decision tree that can be used to generate HTML MAP tags.

PROC DTREE uses the Output Delivery System (ODS), a SAS subsystem that provides capabilities for displaying and controlling the output from SAS procedures. ODS enables you to convert any of the output from PROC DTREE into a SAS data set. For further details, refer to the chapter on ODS in the *SAS/STAT User's Guide*.

Getting Started

Introductory Example

A decision problem for an oil wildcatter illustrates the use of the DTREE procedure. The oil wildcatter must decide whether or not to drill at a given site before his option expires. He is uncertain about many things: the cost of drilling, the extent of the oil or gas deposits at the site, and so on. Based on the reports of his technical staff, the hole could be '**Dry**' with probability 0.5, '**Wet**' with probability 0.3, and '**Soaking**' with probability 0.2. His monetary payoffs are given in the following table.

Table 5.1. Monetary Payoffs of Oil Wildcatter's Problem

	Drill	Not Drill
Dry	0	0
Wet	\$700,000	0
Soaking	\$1,200,000	0

The wildcatter also learned from the reports that the cost of drilling could be \$150,000 with probability 0.2, \$300,000 with probability 0.6, and \$500,000 with probability 0.2. He can gain further relevant information about the underlying geological structure of this site by conducting seismic soundings. A cost control procedure that can make the probabilities of the '**High**' cost outcomes smaller (and hence, the probabilities of the '**Low**' cost outcomes larger) is also available. However, such information and control are quite costly, about \$60,000 and \$120,000, respectively. The wildcatter must also decide whether or not to take the sounding test or the cost control program before he makes his final decision: to drill or not to drill.

The oil wildcatter feels that he should structure and analyze his basic problem first: whether or not to drill. He builds a model that contains one decision stage named '**Drill**' (with two outcomes, '**Drill**' and '**Not_Drill**') and two chance stages named '**Cost**' and '**Oil_Deposit**'. A representation of the model is saved in three SAS data sets. In particular, the `STAGEIN=` data set can be saved as follows:

```

/* -- create the STAGEIN= data set          -- */
data Dtoils1;
  format _STNAME_ $12. _STTYPE_ $2. _OUTCOM_ $10.
         _SUCCES_ $12. ;
  input _STNAME_ $ _STTYPE_ $ _OUTCOM_ $ _SUCCES_ $ ;
  datalines;
Drill      D      Drill      Cost
.          .      Not_Drill .
Cost      C      Low       Oil_Deposit
.          .      Fair      Oil_Deposit
.          .      High     Oil_Deposit
Oil_Deposit C      Dry       .
.          .      Wet      .
.          .      Soaking .
;

```

The structure of the decision problem is given in the `Dtoils1` data set. As you apply this data set, you should be aware of the following points:

- There is no reward variable in this data set; it is not necessary.
- The ordering of the chance stages '`Cost`' and '`Oil_Deposit`' is arbitrary.
- Missing values for the `_SUCCES_` variable are treated as '`_ENDST_`' (the default name of the end stage) unless the associated outcome variable (`_OUTCOM_`) is also missing.

The following `PROBIN=` data set contains the probabilities of events:

```

/* -- create the PROBIN= data set          -- */
data Dtoilp1;
  input _EVENT1 $ _PROB1 _EVENT2 $ _PROB2
        _EVENT3 $ _PROB3 ;
  datalines;
Low   0.2   Fair   0.6   High   0.2
Dry   0.5   Wet    0.3   Soaking 0.2
;

```

Notice that the sum of the probabilities of the events '`Low`', '`Fair`', and '`High`' is 1.0. Similarly, the sum of the probabilities of the events '`Dry`', '`Wet`', and '`Soaking`' is 1.0.

Finally, the following statements produce the `PAYOFFS=` data set that lists all possible scenarios and their associated payoffs.

```

/* -- create PAYOFFS= data set          -- */
data Dtoilul1;
  format _STATE1-_STATE3 $12. _VALUE_ dollar12.0;
  input _STATE1 $ _STATE2 $ _STATE3 $ ;

  /* determine the cost for this scenario */
  if _STATE1='Low' then _COST_=150000;
  else if _STATE1='Fair' then _COST_=300000;
  else _COST_=500000;

  /* determine the oil deposit and the      */
  /* corresponding net payoff for this scenario */
  if _STATE2='Dry' then _PAYOFF_=0;
  else if _STATE2='Wet' then _PAYOFF_=700000;
  else _PAYOFF_=1200000;

  /* calculate the net return for this scenario */
  if _STATE3='Not_Drill' then _VALUE_=0;
  else _VALUE_=_PAYOFF_-_COST_;

  /* drop unneeded variables */
  drop _COST_ _PAYOFF_;

```



```

    datalines;
Low      Dry      Not_Drill
Low      Dry      Drill
Low      Wet      Not_Drill
Low      Wet      Drill
Low      Soaking  Not_Drill
Low      Soaking  Drill
Fair     Dry      Not_Drill
Fair     Dry      Drill
Fair     Wet      Not_Drill
Fair     Wet      Drill
Fair     Soaking  Not_Drill
Fair     Soaking  Drill
High    Dry      Not_Drill
High    Dry      Drill
High    Wet      Not_Drill
High    Wet      Drill
High    Soaking  Not_Drill
High    Soaking  Drill
;

```

This data set can be displayed, as shown in [Figure 5.1](#), with the following PROC PRINT statements:

```

    /* -- print the payoff table          -- */
    title "Oil Wildcatter's Problem";
    title3 "The Payoffs";

    proc print data=Dtoilul;
    run;

```

Oil Wildcatter's Problem				
The Payoffs				
Obs	_STATE1	_STATE2	_STATE3	_VALUE_
1	Low	Dry	Not_Drill	\$0
2	Low	Dry	Drill	\$-150,000
3	Low	Wet	Not_Drill	\$0
4	Low	Wet	Drill	\$550,000
5	Low	Soaking	Not_Drill	\$0
6	Low	Soaking	Drill	\$1,050,000
7	Fair	Dry	Not_Drill	\$0
8	Fair	Dry	Drill	\$-300,000
9	Fair	Wet	Not_Drill	\$0
10	Fair	Wet	Drill	\$400,000
11	Fair	Soaking	Not_Drill	\$0
12	Fair	Soaking	Drill	\$900,000
13	High	Dry	Not_Drill	\$0
14	High	Dry	Drill	\$-500,000
15	High	Wet	Not_Drill	\$0
16	High	Wet	Drill	\$200,000
17	High	Soaking	Not_Drill	\$0
18	High	Soaking	Drill	\$700,000

Figure 5.1. Payoffs of the Oil Wildcatter's Problem

The \$550,000 payoff associated with the scenario 'Low', 'Wet', and 'Drill' is a net figure; it represents a return of \$700,000 for a wet hole less the \$150,000 cost for drilling. Similarly, the net return of the consequence associated with the scenario 'High', 'Soaking', and 'Drill' is \$700,000, which is interpreted as a return of \$1,200,000 less the \$500,000 'High' cost.

Now the wildcatter can invoke PROC DTREE to evaluate his model and to find the optimal decision using the following statements:

```

/* -- PROC DTREE statements          -- */
title "Oil Wildcatter's Problem";

proc dtree stagein=Dtoils1
           probin=Dtoilp1
           payoffs=Dtoilul
           nowarning;

           evaluate / summary;

```

The following message, which notes the order of the stages, appears on the SAS log:

NOTE: Present order of stages:

```
Drill(D), Cost(C), Oil_Deposit(C), _ENDST_(E).
```

```

Oil Wildcatter's Problem

The DTREE Procedure
Optimal Decision Summary

Order of Stages

Stage          Type
-----
Drill          Decision
Cost          Chance
Oil_Deposit   Chance
_ENDST_       End

Decision Parameters

Decision Criterion:  Maximize Expected Value (MAXEV)
Optimal Decision Yields:  $140,000

Optimal Decision Policy

Up to Stage Drill

Alternatives    Cumulative    Evaluating
or Outcomes    Reward        Value
-----
Drill          $140,000*
Not_Drill     $0

```

Figure 5.2. Optimal Decision Summary of the Oil Wildcatter's Problem

The `SUMMARY` option in the `EVALUATE` statement produces the optimal decision summary shown in [Figure 5.2](#).

The summary shows that the best action, in the sense of maximizing the expected payoff, is *to drill*. The expected payoff for this optimal decision is \$140,000, as shown on the summary.

Perhaps the best way to view the details of the results is to display the complete decision tree. The following statement draws the decision tree, as shown in [Figure 5.3](#), in line-printer format:

```

/* plot decision tree diagram in line-printer mode */
OPTIONS LINESIZE=100;
treeplot/ lineprinter;

```

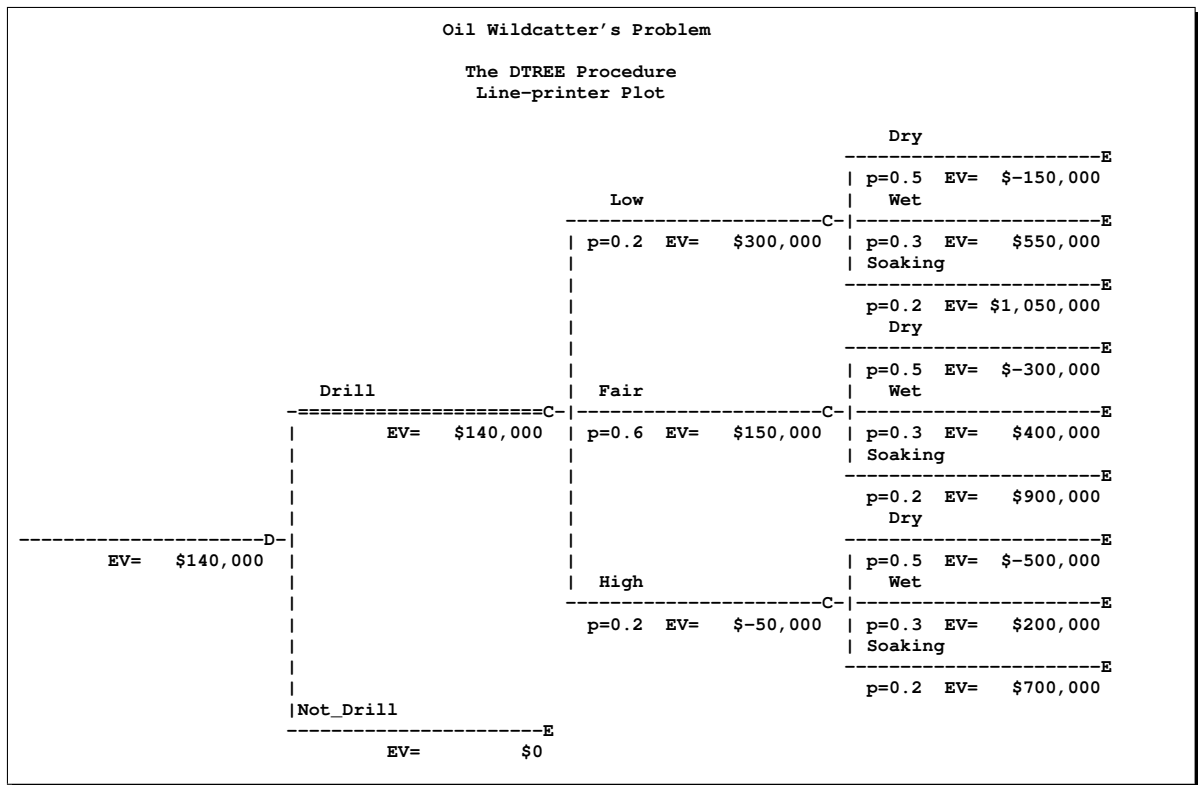


Figure 5.3. The Decision Tree

Attitudes Toward Risk

Assume now that the oil wildcatter is constantly risk averse and has an exponential utility function with a *risk tolerance* (RT) of \$700,000. The risk tolerance is a measure of the decision maker's attitude to risk. See the "Evaluation" section beginning on page 386 for descriptions of the utility function and risk tolerance.

The new optimal decision based on this utility function can be determined with the following statement:

```
evaluate / criterion=maxce rt=700000 summary;
```

The summary, shown in Figure 5.4, indicates that the venture of investing in the oil well is worth \$-13,580 to the wildcatter, and he should not drill the well.

Oil Wildcatter's Problem		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	

Drill	Decision	
Cost	Chance	
Oil_Deposit	Chance	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Certain Equivalent Value (MAXCE)	
Risk Tolerance:	\$700,000	
Optimal Decision Yields:	\$0	
Optimal Decision Policy		
Up to Stage Drill		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value

Drill		\$-13,580
Not_Drill		\$0*

Figure 5.4. Summary of the Oil Wildcatter's Problem with RT = \$700,000

Sensitivity Analysis and Value of Perfect Information

The oil wildcatter learned that the optimal decision changed when his attitude toward risk changed. Since risk attitude is difficult to express quantitatively, the oil wildcatter wanted to learn more about the uncertainties in his problem. Before spending any money on information-gathering procedures, he would like to know the benefit of knowing, before the 'Drill' or 'Not_Drill' decision, the amount of oil or the cost of drilling. The simplest approach is to calculate the value of perfect information for each uncertainty. This quantity gives an upper limit on the amount that could be spent profitably on information gathering. The expected value of information for the amount of oil is calculated by the following statement:

```
vpi Oil_Deposit;
```

The result of the previous statement is written to the SAS log as

```
NOTE: The currently optimal decision yields 140000.
NOTE: The new optimal decision yields 295000.
NOTE: The value of perfect information of stage Oil_Deposit
yields 155000.
```

This means that the wildcatter could spend up to \$155,000 to determine the amount of oil in the deposit with certainty before losing money. There are several alternative ways to calculate the expected value of perfect information. For example, the following statement

```
vpi Cost;
```

is equivalent to

```
save;
move Cost before Drill;
evaluate;
recall;
```

The messages, which appear on the SAS log, show that if there is some way that the wildcatter knows what the cost to drill will be before his decision has to be made, it will yield an expected payoff of \$150,000. So, the expected value of perfect information about drilling cost is \$150,000 - \$140,000 = \$10,000.

```
NOTE: The current problem has been successfully saved.
```

```
NOTE: Present order of stages:
```

```
Cost (C), Drill (D), Oil_Deposit (C), _ENDST_ (E).
```

```
NOTE: The currently optimal decision yields 150000.
```

```
NOTE: The original problem has been successfully recalled.
```

```
NOTE: Present order of stages:
```

```
Drill (D), Cost (C), Oil_Deposit (C), _ENDST_ (E).
```

Value of Perfect Control

The oil wildcatter may also want to know what the value of perfect control (VPC) is on the cost of drilling. That is, how much is he willing to pay for getting complete control on the drilling cost? This analysis can be performed with the following statement:

```
vpc Cost;
```

The result is written to the SAS log as

```
NOTE: The currently optimal decision yields 140000.
```

```
NOTE: The new optimal decision yields 300000.
```

```
NOTE: The value of perfect control of stage Cost
yields 160000.
```

Oil Wildcatter's Problem with Sounding Test

The wildcatter is impressed with the results of calculating the values of perfect information and perfect control. After comparing those values with the costs of the sounding test and the cost-controlling procedure, he prefers to spend \$60,000 on sounding test, which has a potential improvement of \$155,000. He is informed that the sounding will disclose whether the terrain below has no structure (which is bad), open structure (which is okay), or closed structure (which is really hopeful). The expert also provides him with the following table, which shows the conditional probabilities.

Table 5.2. Conditional Probabilities of Oil Wildcatter's Problem

State	Seismic Outcomes		
	No Structure	Open Structure	Closed Structure
Dry	0.6	0.3	0.1
Wet	0.3	0.4	0.3
Soaking	0.1	0.4	0.5

To include this additional information into his basic problem, the wildcatter needs to add two stages to his model: a decision stage to represent the decision whether or not to take the sounding test, and one chance stage to represent the uncertain test result. The new `STAGEIN=` data set is

```

/* -- create the STAGEIN= data set          -- */
data Dtoils2;
  format _STNAME_ $12. _STTYPE_ $2. _OUTCOM_ $14.
         _SUCCES_ $12. _REWARD_ dollar12.0;
  input _STNAME_ & _STTYPE_ & _OUTCOM_ &
         _SUCCES_ & _REWARD_ dollar12.0;
  datalines;
Drill      D    Drill      Cost      .
.          .    Not_Drill  .          .
Cost      C    Low        Oil_Deposit .
.          .    Fair        Oil_Deposit .
.          .    High        Oil_Deposit .
Oil_Deposit C  Dry        .          .
.          .    Wet        .          .
.          .    Soaking   .          .
Sounding  D    Noseismic  Drill      .
.          .    Seismic   Structure  -$60,000
Structure C  No_Struct  Drill      .
.          .    Open_Struct Drill      .
.          .    Closed_Struct Drill      .
;

```

Note that the cost for the seismic soundings is represented as negative reward (of the outcome Seismic) in this data set. The conditional probabilities for stage Structure are added to the `PROBIN=` data set as follows:

```

/* -- create PROBIN= data set          -- */
data Dtoilp2;
  format _EVENT1 $10. _EVENT2 $12. _EVENT3 $14. ;
  input _GIVEN_ $ _EVENT1 $ _PROB1
        _EVENT2 $ _PROB2 _EVENT3 $ _PROB3;
  datalines;
.      Low      0.2 Fair      0.6 High      0.2
.      Dry      0.5 Wet      0.3 Soaking    0.2
Dry    No_Struct 0.6 Open_Struct 0.3 Closed_Struct 0.1
Wet    No_Struct 0.3 Open_Struct 0.4 Closed_Struct 0.3
Soaking No_Struct 0.1 Open_Struct 0.4 Closed_Struct 0.5
;

```

It is not necessary to make any change to the `PAYOFFS=` data set. To evaluate his new model, the wildcatter invokes PROC DTREE as follows:

```

/* -- PROC DTREE statements          -- */
title "Oil Wildcatter's Problem";

proc dtree stagein=Dtoils2
           probin=Dtoilp2
           payoffs=Dtoilul
           nowarning;

  evaluate;

```

As before, the following messages are written to the SAS log:

```

NOTE: Present order of stages:

      Sounding(D), Structure(C), Drill(D), Cost(C),
      Oil_Deposit(C), _ENDST_(E) .

NOTE: The currently optimal decision yields 140000.

```

The following `SUMMARY` statements produce optimal decision summary as shown in Figure 5.5 and Figure 5.6:

```

summary / target=Sounding;
summary / target=Drill;

```

The optimal strategy for the oil-drilling problem is found to be the following:

- No soundings test should be taken, and always drill. This alternative has an expected payoff of \$140,000.
- If the soundings test is conducted, then drill unless the test shows the terrain below has no structure.
- The soundings test is worth $\$180,100 - \$140,000 = \$40,100$ (this quantity is also called the *value of imperfect information* or the *value of sample information*), but it costs \$60,000; therefore, it should not be taken.

Oil Wildcatter's Problem		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	

Sounding	Decision	
Structure	Chance	
Drill	Decision	
Cost	Chance	
Oil_Deposit	Chance	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Expected Value (MAXEV)	
Optimal Decision Yields:	\$140,000	
Optimal Decision Policy		
Up to Stage Sounding		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value

Noseismic	0	\$140,000*
Seismic	-60000	\$180,100

Figure 5.5. Summary of the Oil Wildcatter's Problem for SOUNDING

Oil Wildcatter's Problem				
The DTREE Procedure				
Optimal Decision Summary				
Order of Stages				
Stage	Type			

Sounding	Decision			
Structure	Chance			
Drill	Decision			
Cost	Chance			
Oil_Deposit	Chance			
ENDST	End			
Decision Parameters				
Decision Criterion:	Maximize Expected Value (MAXEV)			
Optimal Decision Yields:	\$140,000			
Optimal Decision Policy				
Up to Stage Drill				
Alternatives or Outcomes			Cumulative Reward	Evaluating Value

Noseismic		Drill	0	\$140,000*
Noseismic		Not_Drill	0	\$0
Seismic	No_Struct	Drill	-60000	\$-97,805
Seismic	No_Struct	Not_Drill	-60000	\$0*
Seismic	Open_Struct	Drill	-60000	\$204,286*
Seismic	Open_Struct	Not_Drill	-60000	\$0
Seismic	Closed_Struct	Drill	-60000	\$452,500*
Seismic	Closed_Struct	Not_Drill	-60000	\$0

Figure 5.6. Summary of the Oil Wildcatter's Problem for DRILL

Note that the value of sample information also can be obtained by using the following statements:

```
modify Seismic reward 0;
evaluate;
```

The following messages, which appear in the SAS log, show the expected payoff with soundings test is \$180,100. Recall that the expected value without test information is \$140,000. Again, following the previous calculation, the value of test information is $\$180,100 - \$140,000 = \$40,100$.

NOTE: The reward of outcome Seismic has been changed to 0.

NOTE: The currently optimal decision yields 180100.

Now, the wildcatter has the information to make his best decision.

Syntax

The following statements are available in PROC DTREE:

```

PROC DTREE options ;
  EVALUATE / options ;
  MODIFY specifications ;
  MOVE specifications ;
  QUIT ;
  RECALL ;
  RESET options ;
  SAVE ;
  SUMMARY / options ;
  TREEPLOT / options ;
  VARIABLES / options ;
  VPC specifications ;
  VPI specifications ;

```

The DTREE procedure begins with the **PROC DTREE** statement and terminates with the **QUIT** statement. The **VARIABLES** statement can be used only once, and if it is used, it must appear before any other statements. The **EVALUATE**, **MODIFY**, **MOVE**, **RECALL**, **RESET**, **SAVE**, **SUMMARY**, **TREEPLOT**, **VPC**, and **VPI** statements can be listed in any order and can be used as many times as desired with one exception: the **RECALL** statement must be preceded by at least one **SAVE** statement.

You can also submit any other valid SAS statements, for example, **OPTIONS**, **TITLE**, and **SAS/GRAPH** global statements. In particular, the **SAS/GRAPH** statements that can be used to enhance the DTREE procedure's output on graphics devices are listed in [Table 5.3](#). Note that the DTREE procedure is not supported with the ActiveX or Java series of devices on the **GOPTIONS** statement. Refer to *SAS/GRAPH Software: Reference* for more explanation of these statements.

Table 5.3. Statements to Enhance Graphics Output

Statement	Function
FOOTNOTE	Produce footnotes that are displayed on the graphics output
GOPTIONS	Define default values for graphics options
NOTE	Produce text that is displayed on the graphics output
SYMBOL	Create symbol definitions
TITLE	Produce titles that are displayed on the graphics output

Functional Summary

The following tables outline the options available for the DTREE procedure classified by function.

Table 5.4. Accuracy Control Options

Description	Statement(s)	Option
accuracy of numerical computation	DTREE, RESET	TOLERANCE=

Table 5.5. Data Set Specifications

Description	Statement(s)	Option
Annotate data set	DTREE, RESET, TREEPLOT	ANNOTATE=
Image map output data set	DTREE, RESET, TREEPLOT	IMAGEMAP=
Payoffs data set	DTREE	PAYOFFS=
Probability data set	DTREE	PROBIN=
Stage data set	DTREE	STAGEIN=

Table 5.6. Error Handling Options

Description	Statement(s)	Option
automatically rescale the probabilities of an uncertainty if they do not sum to 1	DTREE, RESET	AUTOSCALE
react to errors being detected	DTREE, RESET	ERRHANDLE=
do not automatically rescale probabilities	DTREE, RESET	NOSCALE
do not display warning message	DTREE, RESET	NOWARNING
display warning message	DTREE, RESET	WARNING

Table 5.7. Evaluation Control Options

Description	Statement(s)	Option
criterion to determine the optimal decision	DTREE, EVALUATE, RESET	CRITERION=
risk tolerance	DTREE, EVALUATE, RESET	RT=

Table 5.8. Format Control Options

Description	Statement(s)	Option
maximum decimal width to format numerical values	DTREE, EVALUATE, RESET, SUMMARY, TREEPLOT	MAXPREC=
maximum field width to format numerical values	DTREE, EVALUATE, RESET, SUMMARY, TREEPLOT	MAXWIDTH=
maximum field width to format names	DTREE, EVALUATE, RESET, SUMMARY, TREEPLOT	NWIDTH=

Table 5.9. Graphics Catalog Options

Description	Statement(s)	Option
description field for catalog entry	DTREE, RESET, TREEPLOT	DESCRIPTION=
name of graphics catalog	DTREE, RESET, TREEPLOT	GOUT=
name field for catalog entry	DTREE, RESET, TREEPLOT	NAME=

Table 5.10. Line-printer Options

Description	Statement(s)	Option
characters for line-printer plot	DTREE, RESET, TREEPLOT	FORMCHAR=

Table 5.11. Link Appearance Options

Description	Statement(s)	Option
color of LOD ¹	DTREE, RESET, TREEPLOT	CBEST=
color of all links except LOD ¹	DTREE, RESET, TREEPLOT	CLINK=
symbol definition for all links except LOD ¹ and LCP ²	DTREE, RESET, TREEPLOT	LINKA=
symbol definition for LOD ¹	DTREE, RESET, TREEPLOT	LINKB=
symbol definition for LCP ²	DTREE, RESET, TREEPLOT	LINKC=
line type of all links except LOD ¹ and LCP ²	DTREE, RESET, TREEPLOT	LSTYLE=
line type of LOD ¹	DTREE, RESET, TREEPLOT	LSTYLEB=
line type of LCP ²	DTREE, RESET, TREEPLOT	LSTYLEC=
line thickness of all links except LOD ¹	DTREE, RESET, TREEPLOT	LWIDTH=
line thickness of LOD ¹	DTREE, RESET, TREEPLOT	LWIDTHB=

¹LOD denotes links that indicate optimal decisions.

²LCP denotes links that continue on subsequent pages.

Table 5.12. Node Appearance Options

Description	Statement(s)	Option
color of chance nodes	DTREE, RESET, TREEPLOT	CSYMBOLC=
color of decision nodes	DTREE, RESET, TREEPLOT	CSYMBOLD=
color of end nodes	DTREE, RESET, TREEPLOT	CSYMBOL E=
height of symbols for all nodes	DTREE, RESET, TREEPLOT	HSYMBOL=
symbol definition for chance nodes	DTREE, RESET, TREEPLOT	SYMBOLC=
symbol definition for decision nodes	DTREE, RESET, TREEPLOT	SYMBOLD=
symbol definition for end nodes	DTREE, RESET, TREEPLOT	SYMBOL E=
symbol to draw chance nodes	DTREE, RESET, TREEPLOT	VSYMBOLC=
symbol to draw decision nodes	DTREE, RESET, TREEPLOT	VSYMBOLD=
symbol to draw end nodes	DTREE, RESET, TREEPLOT	VSYMBOL E=

Table 5.13. Output Control Options

Description	Statement(s)	Option
suppress displaying the optimal decision summary	DTREE, EVALUATE, RESET	NOSUMMARY
display the optimal decision summary	DTREE, EVALUATE, RESET	SUMMARY
decision stage up to which the optimal decision summary is displayed	DTREE, EVALUATE, RESET, SUMMARY	TARGET=

Table 5.14. Plot Control Options

Description	Statement(s)	Option
draw diagram on one page in graphics mode information are displayed on the decision tree diagram	DTREE, RESET, TREEPLOT DTREE, RESET, TREEPLOT	COMPRESS DISPLAY=
processing of the Annotate data set	DTREE, RESET, TREEPLOT	DOANNOTATE
invoke graphics version	DTREE, RESET, TREEPLOT	GRAPHICS
display labels	DTREE, RESET, TREEPLOT	LABEL
display legend	DTREE, RESET, TREEPLOT	LEGEND
invoke line-printer version	DTREE, RESET, TREEPLOT	LINEPRINTER
suppress processing of the Annotate data set	DTREE, RESET, TREEPLOT	NOANNOTATE
draw diagram across multiple pages	DTREE, RESET, TREEPLOT	NOCOMPRESS
suppress displaying label	DTREE, RESET, TREEPLOT	NOLABEL
suppress displaying legend	DTREE, RESET, TREEPLOT	NOLEGEND
suppress displaying page number	DTREE, RESET, TREEPLOT	NOPAGENUM
use rectangular corners for turns in the links	DTREE, RESET, TREEPLOT	NORC
display page number at upper right corner	DTREE, RESET, TREEPLOT	PAGENUM
use rounded corners for turns in the links	DTREE, RESET, TREEPLOT	RC
vertical space between two end nodes	DTREE, RESET, TREEPLOT	YBETWEEN=

Table 5.15. Text Appearance Options

Description	Statement(s)	Option
text color	DTREE, RESET, TREEPLOT	CTEXT=
text font	DTREE, RESET, TREEPLOT	FTEXT=
text height	DTREE, RESET, TREEPLOT	HTEXT=

Table 5.16. Variables in PAYOFFS= Data Set

Description	Statement(s)	Option
action outcome names	VARIABLES	ACTION=
state outcome names	VARIABLES	STATE=
payoffs	VARIABLES	VALUE=

Table 5.17. Variables in PROBIN= Data Set

Description	Statement(s)	Option
event outcome names	VARIABLES	EVENT=
given outcome names	VARIABLES	GIVEN=
(conditional) probabilities	VARIABLES	PROB=

Table 5.18. Variables in STAGEIN= Data Set

Description	Statement(s)	Option
outcome names	VARIABLES	OUTCOME=
rewards	VARIABLES	REWARD=
stage name	VARIABLES	STAGE=
successor names	VARIABLES	SUCCESSOR=
type of stage	VARIABLES	TYPE=
web reference variable	VARIABLES	WEB=

PROC DTREE Statement

PROC DTREE *options* ;

The options that can appear in the PROC DTREE statement are listed in the following section. The options specified in the PROC DTREE statement remain in effect for all statements until the end of processing or until they are changed by a **RESET** statement. These options are classified under appropriate headings: first, all options that are valid for all modes of the procedure are listed followed by the options classified according to the mode (line-printer or graphics) of invocation of the procedure.

General Options

AUTOSCALE | NOSCALE

specifies whether the procedure should rescale the probabilities of events for a given chance stage if the total probability of this stage is not equal to 1. The default is NOSCALE.

CRITERION=*i*

indicates the decision criterion to be used for determining the optimal decision and the certain equivalent for replacing uncertainties. The following table shows all valid values of *i* and their corresponding decision criteria and certain equivalents.

Table 5.19. Values for the CRITERION= Option

<i>i</i>	Criterion	Certain Equivalent
MAXEV	maximize	expected value
MINEV	minimize	expected value
MAXMLV	maximize	value with largest probability
MINMLV	minimize	value with largest probability
MAXCE	maximize	certain equivalent value of expected utility
MINCE	minimize	certain equivalent value of expected utility

The default value is MAXEV. The last two criteria are used when your utility curve can be fit by an exponential function. See the “[Evaluation](#)” section beginning on page 386 for more information on the exponential utility function.

DISPLAY=(*information-list*)

specifies information that should be displayed on each link of the decision tree diagram. [Table 5.20](#) lists the valid keywords and corresponding information.

Table 5.20. Information on Decision Tree and Keywords

Keyword	Information
ALL	all information listed in this table
CR	cumulative rewards of outcomes on the path that leads to the successor of the link
EV	evaluating value that can be expected from the successor of the link
LINK	outcome name represented by the link
P	probability of the outcome represented by the link
R	instant reward of the outcome represented by the link
STAGE	stage name of the successor of the link

The default value is (LINK P EV R CR).

Note that the probability information displays on links that represent chance outcomes only. In addition, the **PROBIN=** option must be specified. The expected values display only if the decision tree has been evaluated. The reward information displays on a link only if the instant reward of the outcome represented by the link is nonzero. The cumulative rewards do not display if the cumulative rewards of links are all zero.

ERRHANDLE=DRAIN | QUIT

specifies whether the procedure should stop processing the current statement and wait for next statement or quit PROC DTREE when an error has been detected by the procedure. The default value is DRAIN.

GRAPHICS

creates plots for a graphics device. To specify this option, you need to have SAS/GRAPH software licensed at your site. This is the default.

LABEL | NOLABEL

specifies whether the labels for information displayed on the decision tree diagram should be displayed. If the NOLABEL option is not specified, the procedure uses the following symbols to label all the information that is displayed on each link.

Table 5.21. Labels and Their Corresponding Information

Label	Information
cr=	the cumulative rewards of outcomes on the path that lead to the successor of the link
EV=	the value that can be expected from the successor of the link
p=	the probability of the outcome represented by the link
r=	the instant reward of the outcome

The default is LABEL.

LINEPRINTER

LP

creates plots of line-printer quality. If you do not specify this option, graphics plots are produced.

MAXPREC=*d*

specifies the maximum decimal width (the precision) in which to format numerical values using *w.d* format. This option is used in displaying the decision tree diagrams and the summaries. The value for this option must be no greater than 9; the default value is 3.

MAXWIDTH=*mw*

specifies the maximum field width in which to format numerical values (probabilities, rewards, cumulative rewards and evaluating values) using *w.d* format. This option is used in displaying the decision tree diagrams and the summaries. The value for this option must be no greater than 16 and must be at least 5 plus the value of the **MAXPREC=** option. The default value is 10.

NWIDTH=*nw*

specifies the maximum field width in which to format outcome names when displaying the decision tree diagrams. The value for this option must be no greater than 40; the default value is 32.

PAYOFFS=*SAS-data-set*

names the SAS data set that contains the evaluating values (payoffs, losses, utilities, and so on) for each state and action combination. The use of PAYOFFS= is optional in the PROC DTREE statement. If the PAYOFFS= option is not used, PROC DTREE assumes that all evaluating values at the end nodes of the decision tree are 0.

PROBIN=*SAS-data-set*

names the SAS data set that contains the (conditional) probability specifications of outcomes. The PROBIN= SAS data set is required if the evaluation of the decision tree is desired.

RT=*r*

specifies the value of the risk tolerance. The RT= option is used only when **CRITERION=MAXCE** or **CRITERION=MINCE** is specified. If the RT= option is not specified, and **CRITERION=MAXCE** or **CRITERION=MINCE** is specified, PROC DTREE changes the value of the **CRITERION=** option to MAXEV or MINEV (which would mean straight-line utility function and imply infinite risk tolerance).

STAGEIN=*SAS-data-set*

names the SAS data set that contains the stage names, stage types, names of outcomes, and their rewards and successors for each stage. If the STAGEIN= option is not specified, PROC DTREE uses the most recently created SAS data set.

SUMMARY | NOSUMMARY

specifies whether an optimal decision summary should be displayed each time the decision tree is evaluated. The decision summary lists all paths through the tree that lead to the target stage as well as the cumulative rewards and the evaluating values of all alternatives for that path. The alternative with optimal evaluating value for each path is marked with an asterisk (*). The default is NOSUMMARY.

TARGET=*stage*

specifies the decision stage up to which the optimal decision policy table is displayed. The TARGET= option is used only in conjunction with the **SUMMARY** option. The stage specified must be a decision stage. If the TARGET= option is not specified, the procedure displays an optimal decision policy table for each decision stage.

TOLERANCE=*d*

specifies either a positive number close to 0 or greater than 1. PROC DTREE treats all numbers within e of 0 as 0, where

$$e = \begin{cases} d & \text{if } d < 1 \\ d \times \epsilon & \text{otherwise} \end{cases}$$

and ϵ is the *machine epsilon*. The default value is 1,000.

WARNING | NOWARNING

specifies whether the procedure should display a warning message when

- the payoff for an outcome is not assigned in the `PAYOFFS=` data set
- probabilities of events for a given chance stage have been automatically scaled by PROC DTREE because the total probability of the chance stage does not equal 1

The default is WARNING.

YBETWEEN=*ybetween* <units>

specifies the vertical distance between two successive end nodes. If the `GRAPHICS` option is specified, the valid values for the optional *units* are listed in Table 5.22.

Table 5.22. Valid Values for the Units of the YBETWEEN= Option

Unit	Description
CELL	character cells
CM	centimeters
INCH	inches
PCT	percentage of the graphics output area
SPACE	height of the box surrounding the node, its predecessor link, and all text information

The value of the YBETWEEN= option must be greater than or equal to 0. Note that if the `COMPRESS` option is specified, the actual distance between two successive end nodes is scaled by PROC DTREE and may not be the same as the YBETWEEN= specification.

If the `LINEPRINTER` option is specified, the optional *units* value can be CELL or SPACE. The value of the YBETWEEN= option must be a nonnegative integer.

If you do not specify units, a unit specification is determined in the following order:

- the `GUNIT=` option in a `GOPTIONS` statement, if the `GRAPHICS` option is specified
- the default unit, CELL

The default value of YBETWEEN= option is 0.

Graphics Options

The following options are specifically for the purpose of producing a high-resolution quality decision tree diagram.

ANNOTATE=SAS-data-set

ANNO=SAS-data-set

specifies an input data set that contains appropriate Annotate variables. The ANNOTATE= option enables you to add features (for example, customized legend) to plots produced on graphics devices. For additional information, refer to the chapter on the annotate data set in *SAS/GRAPH Software: Reference*.

CBEST=color

CB=color

specifies the color for all links in the decision tree diagram that represent optimal decisions. If you do not specify the CBEST= option, the color specification is determined in the following order:

- the CI= option in the *j*th generated SYMBOL definition, if the option LINKB=*j* is specified
- the second color in the colors list

CLINK=color

CL=color

specifies the color for all links in the decision tree diagram except those that represent optimal decisions. If the CLINK= option is not specified, the color specification is determined in the following order:

- the CI= option in the *i*th generated SYMBOL definition, if the option LINKA=*i* is specified
- the third color in the colors list

COMPRESS | NOCOMPRESS

CP | NOCP

specifies whether the decision tree diagram should be drawn on one physical page. If the COMPRESS option is specified, PROC DTREE determines the scale so that the diagram is compressed, if necessary, to fit on one physical page. Otherwise, the procedure draws the diagram across multiple pages if necessary. The default is NOCOMPRESS.

CSYMBOLC=color

CC=color

specifies the color of the symbol used to draw all chance nodes in the decision tree diagram. If the CSYMBOLC= option is not specified, the color specification is determined in the following order:

- the CV= option in the *m*th generated SYMBOL definition, if the option SYMBOLC=*m* is specified
- the CSYMBOL= option in a GOPTIONS statement
- the fifth color in the colors list

CSYMBOL=*color***CD=***color*

specifies the color of the symbol used to draw all decision nodes in the decision tree diagram. If the CSYMBOL= option is not specified, the color specification is determined in the following order:

- the CV= option in the *d*th generated SYMBOL definition, if the option **SYMBOL=***d* is specified
- the CSYMBOL= option in a GOPTIONS statement
- the fourth color in the colors list

CSYMBOL=*color***CE=***color*

specifies the color of the symbol used to draw all end nodes in the decision tree diagram. If the CSYMBOL= option is not specified, the color specification is determined in the following order:

- the CV= option in the *n*th generated SYMBOL definition, if the option **SYMBOL=***n* is specified
- the CSYMBOL= option in a GOPTIONS statement
- the sixth color in the colors list

CTEXT=*color***CT=***color*

specifies the color to be used for all text that appears on plots except on TITLE and FOOTNOTE lines. If the CTEXT= option is not specified, the color specification is determined in the following order:

- the CTEXT= option in a GOPTIONS statement
- the first color in the colors list

DESCRIPTION='*string*'**DES=**'*string*'

specifies a descriptive string, up to 40 characters long, that appears in the description field of the master menu of PROC GREPLAY. If the DESCRIPTION= option is omitted, the description field contains a description assigned by PROC DTREE.

DOANNOTATE | NOANNOTATE**DOANNO | NOANNO**

specifies whether the Annotate data set should be processed. If the NOANNOTATE option is specified, the procedure does not process the Annotate data set even though the **ANNOTATE=** option is specified. The default is DOANNOTATE.

FTEXT=*name***FONT=***name*

specifies the font to be used for text on plots. If you do not use this option, the font specification is determined in the following order:

- the FTEXT= option in a GOPTIONS statement
- the hardware font for your graphics output device

Refer to the chapter on SAS/GRAPH fonts in *SAS/GRAPH Software: Reference* for details about SAS/GRAPH fonts.

GOUT=*SAS-catalog*

specifies the name of the graphics catalog used to save the output produced by PROC DTREE for later replay. For additional information, refer to the chapter on graphics output in *SAS/GRAPH Software: Reference*.

HSYMBOL=*h***HS=***h*

specifies that the height of symbols for all nodes in the decision tree diagram is *h* times the heights of symbols assigned by SAS/GRAPH software. You can specify the heights of decision nodes, chance nodes, and end nodes by using the HEIGHT= options in the corresponding SYMBOL statements. For example, if you specify the options HSYMBOL=2 and SYMBOLD=1 in the PROC DTREE statement and defined SYMBOL1 as

```
symbol1 height=4 pct;
```

then all decision nodes in the decision tree diagram are sized at $2 \times 4 = 8\%$ of the graphics output area. The default value is 1.

HTEXT=*h***HT=***h*

specifies that the height for all text in plots (except that in TITLE and FOOTNOTE statements) be *h* times the height of the characters assigned by SAS/GRAPH software. You can also specify character height by using the HTEXT= option in a GOPTIONS statement.

For example, if you specify the option HTEXT=0.6 in the PROC DTREE statement and also specified a GOPTIONS statement as follows

```
options htext=2 in;
```

then the size of all text is $0.6 \times 2 = 1.2$ inches. For more explanation of the GOPTIONS statement, refer to the chapter on the GOPTIONS statement in *SAS/GRAPH Software: Reference*. The default value is 1.

IMAGEMAP=SAS-data-set

names the SAS data set that receives a description of the areas of a graph and a link for each area. This information is for the construction of HTML image maps. You use a SAS DATA step to process the output file and generate your own HTML files. The graph areas correspond to the link information that comes from the **WEB=** variable in the **STAGEIN=** data set. This gives you complete control over the appearance and structure of your HTML pages.

LEGEND | NOLEGEND**LG | NOLG**

specifies whether the default legend should be displayed. If the **NOLEGEND** is not specified, the procedure displays a legend at the end of each page of the decision tree diagram. The default is **LEGEND**.

LINKA=i

If the **LINKA=i** option is specified, then PROC DTREE uses the color specified with the **CI=** option, the type specified with the **LINE=** option, and the thickness specified with the **WIDTH=** option in the *i*th generated **SYMBOL** definition to draw all links in the decision tree diagram, except those that indicate optimal decisions and those that are continued on subsequent pages. There is no default value for this option. The color, type, and thickness specifications may be overridden by the specifications of the **CLINK=**, **LSTYLE=**, and **LWIDTH=** options in the PROC DTREE statement.

Note that if you specify the **LINKA=i** option, PROC DTREE uses the specifications in the *i*th *generated SYMBOL definition* and not the specifications in the **SYMBOL*i*** statement. Refer to *SAS/GRAPH Software: Reference* for the details about creating, canceling, reviewing, and altering **SYMBOL** definitions.

LINKB=j

If the **LINKB=j** option is specified, then PROC DTREE uses the color specified with the **CI=** option, the type specified with the **LINE=** option, and the thickness specified with the **WIDTH=** option in the *j*th generated **SYMBOL** definition to draw all links that represent optimal decisions. There is no default value for this option. The color, type, and thickness specifications may be overridden by the specifications of the **CBEST=**, **LSTYLEB=**, and **LWIDTHB=** options in the PROC DTREE statement.

Note that if you specify the **LINKB=j** option, PROC DTREE uses the specifications in the *j*th *generated SYMBOL definition* and not the specifications in the **SYMBOL*j*** statement. Refer to *SAS/GRAPH Software: Reference* for the details about creating, canceling, reviewing, and altering **SYMBOL** definitions.

LINKC=k

If the **LINKC=k** option is specified, then PROC DTREE uses the type specified with the **LINE=** option in the *k*th generated **SYMBOL** definition to draw all links in the decision tree diagram that are continued on subsequent pages. There is no default value for this option. The color and thickness for links continued on another page indicate whether the link represents an optimal decision or not. The type specification may be overridden by the specification of the **LSTYLEC=** option in the PROC DTREE statement.

Note that if you specify the **LINKC=k** option, PROC DTREE uses the specifications

in the *k*th generated SYMBOL definition and not the specifications in the SYMBOL*k* statement. Refer to *SAS/GRAPH Software: Reference* for the details about creating, canceling, reviewing, and altering SYMBOL definitions.

LSTYLE=*l***L=***l*

specifies the line type (style) used for drawing all links in the decision tree diagram, except those that represent the optimal decisions and those that are continued on subsequent pages. Valid values for *l* are 1 through 46. If the LSTYLE= option is not specified, the type specification is determined in the following order:

- the LINE= option in the *i*th generated SYMBOL definition, if the option LINKA=*i* is specified
- the default value, 1 (solid line)

LSTYLEB=*l2***LB=***l2*

specifies the line type (style) used for drawing the links in the decision tree diagram that represent optimal decisions. Valid values for *l2* are 1 through 46. If the LSTYLEB= option is not specified, the type specification is determined in the following order:

- the LINE= option in the *j*th generated SYMBOL definition, if the option LINKB=*j* is specified
- the default value, 1 (solid line)

LSTYLEC=*l3***LC=***l3*

specifies the line type (style) used for drawing the links in the decision tree diagram that are continued on the next subsequent pages. Valid values for *l3* are 1 through 46.

If the LSTYLEC= option is not specified, the type specification is determined in the following order:

- the LINE= option in the *k*th generated SYMBOL definition, if the option LINKC=*k* is specified
- the default value, 2 (dot line)

LWIDTH=*w***LTHICK=***w*

specifies the line thickness (width) used to draw all links in the decision tree diagram except those that represent the optimal decisions.

If the LWIDTH= option is not specified, the thickness specification is determined in the following order:

- the WIDTH= option in the *i*th generated SYMBOL definition, if the option LINKA=*i* is specified
- the default value, 1

LWIDTHB=*w2*

LTHICKB=*w2*

specifies the line thickness (width) used to draw the links in the decision tree diagram that represent optimal decisions. If the LWIDTHB= option is not specified, the thickness specification is determined in the following order:

- the WIDTH= option in the *j*th generated SYMBOL definition, if the option LINKB=*j* is specified
- 2 times the thickness for links that represent regular outcomes

NAME='string'

specifies a descriptive string, up to 8 characters long, that appears in the name field of the master menu of PROC GREPLAY. The default is 'DTREE'.

PAGENUM | NOPAGENUM

PAGENUMBER | NOPAGENUMBER

specifies whether the page numbers should be displayed in the top right corner of each page of a multipage decision tree diagram. If the NOPAGENUM is not specified, the pages are ordered from top to bottom, left to right.

The default is PAGENUM.

RC | NORC

specifies whether the links in the decision tree diagram should be drawn with rounded corners or with rectangular corners. The default is RC.

SYMBOLC=*m*

SYMBC=*m*

If the SYMBOLC= option is specified, then PROC DTREE uses the color specified with the CV= option, the character specified with the VALUE= option, the font specified with the FONT= option, and the height specified with the HEIGHT= option in the *m*th generated SYMBOL definition to draw all chance nodes in the decision tree diagram. There is no default value for this option. The color and the symbol specifications may be overridden by the specification of the CSYMBOLC= and VSYMBOLC= options in the PROC DTREE statement. The height of the symbol can be changed by the HSYMBOL= option in the PROC DTREE statement.

Note that if you specify the SYMBOLC=*m* option, PROC DTREE uses the specifications in the *m*th generated SYMBOL definition and not the specifications in the SYMBOL*m* statement. Refer to *SAS/GRAPH Software: Reference* for the details about creating, canceling, reviewing, and altering SYMBOL definitions.

SYMBOLD=*d*

SYMBD=*d*

If the SYMBOLD= option is specified, then PROC DTREE uses the color specified with the CV= option, the character specified with the VALUE= option, the font specified with the FONT= option, and the height specified with the HEIGHT= option

in the d th generated SYMBOL definition to draw all decision nodes in the decision tree diagram. There is no default value for this option. The color and the symbol specifications may be overridden by the specification of the **CSYMBOLD=** and **VSYMBOLD=** options in the PROC DTREE statement. The height of the characters can be changed by the **HSYMBOL=** option in the **PROC DTREE** statement.

Note that if you specify the **SYMBOLD= d** option, PROC DTREE uses the specifications in the d th generated SYMBOL definition and not the specifications in the **SYMBOL d** statement. Refer to *SAS/GRAPH Software: Reference* for the details about creating, canceling, reviewing, and altering SYMBOL definitions.

SYMBOLE= n

SYMBE= n

If the **SYMBOLE=** option is specified, then PROC DTREE uses the color specified with the **CV=** option, the character specified with the **VALUE=** option, the font specified with the **FONT=** option, and the height specified with the **HEIGHT=** option in the n th generated SYMBOL definition to draw all end nodes in the decision tree diagram. There is no default value for this option. The color and the symbol specifications may be overridden by the specification of the **CSYMBOLE=** and **VSYMBOLE=** options specified in the PROC DTREE statement. The height of the characters can be changed by the **HSYMBOL=** option in the **PROC DTREE** statement.

Note that if you specify the **SYMBOLE= n** option, PROC DTREE uses the specifications in the n th generated SYMBOL definition and not the specifications in the **SYMBOL n** statement. Refer to *SAS/GRAPH Software: Reference* for the details about creating, canceling, reviewing, and altering SYMBOL definitions.

VSYMBOLC=*symbolc-name*

VC=*symbolc-name*

specifies that the symbol *symbolc-name* from the special symbol table be used to draw all chance nodes in the decision tree diagram. If you do not specify this option, the symbol used is determined in the following order:

- the options **VALUE=** and **FONT=** specifications in the m th generated SYMBOL definition, if the option **VSYMBOLC= m** is specified
- the symbol **CIRCLE** in the special symbol table

VSYMBOLD=*symbold-name*

VD=*symbold-name*

specifies that the symbol *symbold-name* from the special symbol table be used to draw all decision nodes in the decision tree diagram. If you do not specify this option, the symbol used is determined in the following order:

- the options **VALUE=** and **FONT=** specifications in the d th generated SYMBOL definition, if the option **VSYMBOLD= d** is specified
- the symbol **SQUARE** in the special symbol table

VSYMBOL=*symbole-name*

VE=*symbole-name*

specifies that the symbol *symbole-name* from the special symbol table be used to draw all end nodes in the decision tree diagram. If you do not specify this option, the symbol used is determined in the following order:

- the options VALUE= and FONT= specifications in the *n*th generated SYMBOL definition, if the option **SYMBOL=*n*** is specified
- the symbol DOT in the special symbol table

Line-Printer Options

The following options are specifically for the purpose of producing line-printer quality decision tree diagram.

FORMCHAR<(syni-list)>= '*formchar-string*'

defines characters to be used for features on line-printer plots. The *syni-list* is a list of numbers ranging from 1 to 13. The list identifies which features are controlled with the string characters. The *formchar-string* gives characters for features in *syni-list*. Any character or hexadecimal string can be used. By default, *syni-list* is omitted, and the FORMCHAR= option gives a string for all 13 features. The features associated with values of *syni* are listed in Table 5.23. Note that characters 4, 6, 7, 10, and 12 are not used in drawing a decision tree diagram.

Table 5.23. Features Associated with the FORMCHAR= Option

Syni	Description of Character	Feature
1	vertical bar	vertical link
2	horizontal bar	horizontal link
3	box character (upper left)	vertical up to horizontal turn
5	box character (upper right)	horizontal and down vertical joint
8	box character (middle right)	horizontal to split joint
9	box character (lower left)	vertical down to horizontal turn
11	box character (lower right)	horizontal and up vertical joint
13	horizontal thick	horizontal link that represents optimal decision

As an example, the decision tree diagram in Figure 5.7 is produced by the following statement:

```

title "Decision Tree Showing the Effects of FORMCHAR";

data Dtoils4;
  format _STNAME_ $12. _STTYPE_ $2. _OUTCOM_ $10.
         _SUCCES_ $12.;
  input _STNAME_ $ _STTYPE_ $ _OUTCOM_ $ _SUCCES_ $;
  datalines;
Drill      D      Drill      Cost
.          .      Not_Drill  .
Cost       C      Low        Oil_Deposit
.          .      High       Oil_Deposit

```

```

Oil_Deposit C   Dry   .
              .   Wet   .
;

proc dtree stagein=Dtoils4
      nowarning
;
      treeplot / formchar(1 2 3 5 8 9 11 13)='|-/ * < \ += '
              lineprinter display=(LINK);
quit;

```

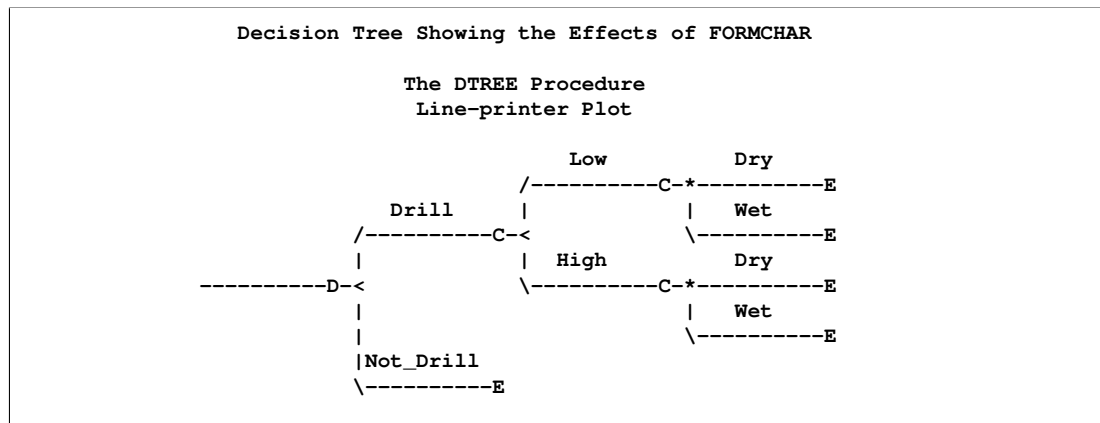


Figure 5.7. Decision Tree Showing the Effects of FORMCHAR

By default, the form character list specified with the SAS system option FORMCHAR= is used; otherwise, the default is '|-----|+|-----|='. Refer to the chapter on the Calendar Procedure in the *SAS Procedures Guide* for more information.

EVALUATE Statement

EVALUATE / options ;

The EVALUATE statement causes PROC DTREE to evaluate the decision tree and calculate the optimal decisions. If the SUMMARY option is specified a decision summary is displayed. Otherwise, the current optimal value is displayed on the SAS log.

The following options, which can appear in the PROC DTREE statement, can also be specified in the EVALUATE statement:

CRITERION= <i>i</i>	MAXPREC= <i>d</i>	MAXWIDTH= <i>mw</i>
NOSUMMARY	NWIDTH= <i>nw</i>	RT= <i>r</i>
SUMMARY	TARGET= <i>stage</i>	

The `MAXPREC=`, `MAXWIDTH=`, and `NWIDTH=`, options are valid only in conjunction with the `SUMMARY` option. The `RT=` option is valid only in conjunction with the `CRITERION=MAXCE` or `CRITERION=MINCE` specification. The options specified in this statement are only in effect for this statement.

MODIFY Statement

```
MODIFY outcome-name REWARD new-value ;
MODIFY stage-name TYPE ;
```

The `MODIFY` statement is used to change either the type of a stage or the reward from an outcome. If `MODIFY outcome-name REWARD new-value` is given where the *outcome-name* is an outcome specified in the `STAGEIN=` data set, and *new-value* is a numeric value, then the reward of the outcome named *outcome-name* is changed to *new-value*.

If `MODIFY stage-name TYPE` is given where *stage-name* is a stage name specified in the `STAGEIN=` data set, then the type of the stage named *stage-name* is changed to 'DECISION' if its current type is 'CHANCE' and is changed to 'CHANCE' if its current type is 'DECISION'. You cannot change the type of an 'END' stage. The change of the type of a stage from 'CHANCE' to 'DECISION' can help the decision-maker learn how much improvement can be expected if he or she could pick which of the future (or unknown) outcomes would occur. However, if you want to change the type of a stage from 'DECISION' to 'CHANCE', the procedure is not able to determine the probabilities for its outcomes unless you specify them in the `PROBIN=` data set.

MOVE Statement

```
MOVE stage1 (BEFORE | AFTER) stage2 ;
```

The `MOVE` statement is used to change the order of the stages. After all data in input data sets have been read, PROC DTREE determines the order (from left to right) of all stages specified in the `STAGEIN=` data set and display the order in the SAS log. The ordering is determined based on the rule that if stage **A** is the successor of an outcome of stage **B**, then stage **A** should occur to the right of stage **B**. The `MOVE` statement can be used to change the order. If the keyword `BEFORE` is used, *stage1* becomes the new successor for all immediate predecessors of *stage2*, and *stage2* becomes the new successor for all outcomes of *stage1*. An outcome is said to be an *immediate predecessor* of a stage if the stage is the successor of that outcome. Similarly, if the keyword `AFTER` is used, the old leftmost (in previous order) successor of outcomes for *stage2* becomes the new successor for all outcomes of *stage1* and the new successor of all outcomes of *stage2* is *stage1*.

There are two limitations: the `END` stage cannot be moved, and no stage can be moved after the `END` stage. In practice, any stage after the `END` stage is useless.

QUIT Statement

QUIT ;

The QUIT statement tells the DTREE procedure to terminate processing. This statement has no options.

RECALL Statement

RECALL ;

This statement tells PROC DTREE to recall the decision model that was saved previously with a [SAVE](#) statement. The RECALL statement has no options.

RESET Statement

RESET *options* ;

The RESET statement is used to change options after the procedure has started. All of the options that can be set in the [PROC DTREE](#) statement can also be reset with this statement, except for the [STAGEIN=](#), the [PROBIN=](#), and the [PAYOFFS=](#) data set options.

SAVE Statement

SAVE ;

The SAVE statement saves the current model (attributes of stages and outcomes, the ordering of stages, and so on) to a scratch space from which you can call it back later. It is a good idea to save your decision model before you specify any [MOVE](#) or [MODIFY](#) statements. Then you can get back to your original model easily after

a series of statements that change the decision model. The SAVE statement has no options.

SUMMARY Statement

SUMMARY / *options* ;

Unlike the [SUMMARY](#) option on the [PROC DTREE](#) statement or the [EVALUATE](#) statement, which specifies that PROC DTREE display a decision summary when the decision tree is evaluated, the SUMMARY statement causes the procedure to display the summary immediately. If the decision tree has not been evaluated yet, or if it has been changed (by the [MOVE](#), [MODIFY](#), or [RECALL](#) statement) since last evaluated, the procedure evaluates or re-evaluates the decision tree before the summary is displayed.

The following options that can appear in the [PROC DTREE](#) statement can also be specified in this statement:

MAXPREC=*d* MAXWIDTH=*mw*
 NWIDTH=*nw* TARGET=*stage*

The options specified in this statement are in effect only for this statement.

TREEPLOT Statement

TREEPLOT / *options* ;

The TREEPLOT statement plots the current decision tree (a diagram of the decision problem). Each path in the decision tree represents a possible scenario of the problem. In addition to the nodes and links on the decision tree, the information for each link that can be displayed on the diagram is listed in Table 5.24.

Table 5.24. Information on Decision Tree Diagram

Information	Labeled by
stage name for the successor of the link	NL ³
outcome name for the link	NL ³
probability of the outcome	p=
value can be expected from the successor	EV=
instant reward of the outcome	r=
cumulative rewards of outcomes on the path that leads to the successor	cr=

³NL denotes that this information is not labeled.

If necessary, the outcome names and the stage names are displayed above the link, and other information (if there is any) is displayed below the link. The DISPLAY= option can be used to control which information should be included in the diagram. The NOLABEL can be used to suppress the displaying of the labels.

If the LINEPRINTER option is used, the decision nodes, chance nodes, and the end nodes are represented by the characters ‘D’, ‘C’, and ‘E’, respectively. The links are displayed using the specifications of the FORMCHAR= option. See the section “PROC DTREE Statement” beginning on page 361 for more details. In graphics mode, the control of the appearances of nodes and links is more complex. See the “Displaying the Decision Tree” section beginning on page 390 for more information.

The following options that can appear in the PROC DTREE statement can also be specified in the TREEPLOT statement:

DISPLAY=(*information-list*) GRAPHICS LABEL
 LINEPRINTER MAXPREC=*d* MAXWIDTH=*mw*
 NOLABEL NWIDTH=*nw* YBETWEEN=*ybetween* <*units*>

The following line-printer options that can appear in the PROC DTREE statement can also be specified in the TREEPLOT statement if the LINEPRINTER option is specified:

FORMCHAR<(syni-list)>=‘*formchar-string*’

Moreover, the following graphics options that can appear in the PROC DTREE statement can also be specified in the TREEPLOT statement if the GRAPHICS option is specified:

ANNOTATE= <i>SAS-data-set</i>	CBEST= <i>color</i>	CLINK= <i>color</i>
COMPRESS	CSYMBOLC= <i>color</i>	CSYMBOLD= <i>color</i>
CSYMBOLE= <i>color</i>	CTEXT= <i>color</i>	DESCRIPTION= <i>'string'</i>
DOANNOTATE	FTEXT= <i>name</i>	GOUT= <i>SAS-catalog</i>
HSYMBOL= <i>h</i>	HTEXT= <i>h</i>	IMAGEMAP= <i>SAS-data-set</i>
LEGEND	LINKA= <i>i</i>	LINKB= <i>j</i>
LINKC= <i>k</i>	LSTYLE= <i>l</i>	LSTYLEB= <i>l2</i>
LSTYLEC= <i>l3</i>	LWIDTH= <i>w2</i>	LWIDTHB= <i>w2</i>
NAME= <i>'string'</i>	NOANNOTATE	NOCOMPRESS
NOLEGEND	NOPAGENUM	NORC
PAGENUM	RC	SYMBOLC= <i>m</i>
SYMBOLD= <i>d</i>	SYMBOLE= <i>n</i>	VSYMBOLC= <i>symbolc-name</i>
VSYMBOLD= <i>symbold-name</i>	VSYMBOLE= <i>sybole-name</i>	

The options specified in this statement are in effect only for this statement, and they may override the options specified in the PROC DTREE statement.

VARIABLES Statement

VARIABLES / *options* ;

The VARIABLES statement specifies the variable lists in the input data sets. This statement is optional but if it is used, it must appear immediately after the PROC DTREE statement. The options that can appear in the VARIABLES statement are

divided into groups according to the data set in which they occur. Table 5.25 lists all the variables or variable lists associated with each input data set and their types. It also lists the default variables if they are not specified in this statement.

Table 5.25. Input Data Sets and Their Associated Variables

Data Set	Variable	Type ⁴	Interpretation	Default
STAGEIN=	OUTCOME= REWARD= STAGE= SUCCESSOR= TYPE= WEB=	C/N N C/N as STAGE= C/N C	Outcome names Instant reward Stage name Immediate successors Stage type HTML page for the stage	Variables with prefix _OUT Variables with prefix _REW _STNAME_ Variables with prefix _SUCC _STTYPE_
PROBIN=	EVENT= GIVEN= PROB=	as OUTCOME= as OUTCOME= N	Event names Names of given outcomes Conditional probabilities	Variables with prefix _EVEN Variables with prefix _GIVE Variables with prefix _PROB
PAYOFFS=	ACTION= STATE= VALUE=	as OUTCOME= as OUTCOME= N	Action names of final decision Outcome names Values of the scenario	Variables with prefix _ACT Variables with prefix _STAT Variables with prefix _VALU

⁴'C' denotes character, 'N' denotes numeric, 'C/N' denotes character or numeric, and 'as X' denotes the same as variable X.

Variables in STAGEIN= Data Set

The following options specify the variables or variable lists in the **STAGEIN=** input data set that identify the stage name, its type, its outcomes, and the reward; and the immediate successor of each outcome for each stage in the decision model:

OUTCOME=(variables)

identifies all variables in the **STAGEIN=** data set that contain the outcome names of the stage specified by the **STAGE=** variable. If the **OUTCOME=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_OUT** in the data set. It is necessary to have at least one **OUTCOME=** variable in the **STAGEIN=** data set. The **OUTCOME=** variables can be either all character or all numeric. You cannot mix character and numeric variables as outcomes.

REWARD=(variables)**COST=(variables)**

identifies all variables in the **STAGEIN=** data set that contain the reward for each outcome specified by the **OUTCOME=** variables. If the **REWARD=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_REW** in the data set. The number of **REWARD=** variables must be equal to the number of **OUTCOME=** variables in the data set. The **REWARD=** variables must have numeric values.

STAGE=variable

specifies the variable in the **STAGEIN=** data set that names the stages in the decision model. If the **STAGE=** option is omitted, PROC DTREE looks for the default variable named **_STNAME_** in the data set. The **STAGE=** variable must be specified if the data set does not contain a variable named **_STNAME_**. The **STAGE=** variable can be either character or numeric.

SUCCESSOR=(variables)**SUCC=(variables)**

identifies all variables in the **STAGEIN=** data set that contain the names of immediate successors (another stage) of each outcome specified by the **OUTCOME=** variables. These variables must be of the same type and length as those defined in the **STAGE=** option. If the **SUCCESSOR=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_SUCC** in the data set. The number of **SUCCESSOR=** variables must be equal to the number of **OUTCOME=** variables. The values of **SUCCESSOR=** variables must be stage names (values of **STAGE=** variables in the same data set).

TYPE=variable

identifies the variable in the **STAGEIN=** data set that contains the type identifier of the stage specified by the **STAGE=** variable. If the **TYPE=** option is omitted, PROC DTREE looks for the default variable named **_STTYPE_** in the data set. The **TYPE=** variable must be specified if the data set does not contain a variable named **_STTYPE_**. The **STAGE=** variable can be either character or numeric.

The following are valid values for the **TYPE=** variable.

Value	Description
DECISION or D or 1	identifies the stage as a decision stage
CHANCE or C or 2	identifies the stage as an uncertain stage
END or E or 3	identifies the stage as an end stage

It is not necessary to specify an end stage in the **STAGEIN=** data set.

WEB=*variable*

HTML=*variable*

specifies the character variable in the **STAGEIN=** data set that identifies an HTML page for each stage. The procedure generates an HTML image map using this information for all the decision tree nodes corresponding to a stage.

Variables in **PROBIN=** Data Set

The following options specify the variables or variable lists in the **PROBIN=** input data set that identify the given outcome names, the event (outcome) name, and the conditional probability for each outcome of a chance stage.

EVENT=*(variables)*

identifies all variables in the **PROBIN=** data set that contain the names of events (outcomes) that probabilities depend on the outcomes specified by the **GIVEN=** variables. If the **EVENT=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_EVEN** in the data set. You must have at least one **EVENT=** variable in the **PROB=** data set. The values of **EVENT=** variables must be outcome names that are specified in the **STAGEIN=** data set.

GIVEN=*(variables)*

identifies all variables in the **PROBIN=** data set that contain the given condition (a list of outcome names) of a chance stage on which the probabilities of the outcome depend. If the **GIVEN=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_GIVE** in the data set. It is not necessary to have **GIVEN=** variables in the data set but if there are any, their values must be outcome names that are specified in the **STAGEIN=** data set.

PROB=*(variables)*

identifies all variables in the **PROBIN=** data set that contain the values of the conditional probability of each event specified by the **EVENT=** variables, given that the outcomes specified by the **GIVEN=** variables have occurred. If the **PROB=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_PROB** in the data set. The number of **PROB=** variables in the data set must be equal to the number of **EVENT=** variables. The **PROB=** variables must have numeric values between 0 and 1 inclusive.

Variables in **PAYOFFS=** Data Set

The following options specify the variables or variable lists in the **PAYOFFS=** input data set that identify the possible scenarios (a sequence of outcomes), the final outcome names, and the evaluating values (payoff) of combinations of scenarios and final outcomes.

ACTION=(*variables*)

identifies all variables in the **PAYOFFS=** data set that contain the name of the final outcome for each possible scenario. If the **ACTION=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_ACT** in the data set. It is not necessary to have any **ACTION=** variables in the **PAYOFFS=** data set, but if there are any, their values must be outcome names specified in the **STAGEIN=** data set.

STATE=(*variables*)

identifies all variables in the **PAYOFFS=** data set that contain the names of outcomes that identify a possible scenario (a sequence of outcomes or a path in the decision tree), or the names of outcomes which combine with every outcome specified by the **ACTION=** variables to identify a possible scenario. If the **STATE=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_STAT** in the data set. It is not necessary to have any **STATE=** variables in the **PAYOFFS=** data set, but if there are any, their values must be outcome names specified in the **STAGEIN=** data set.

VALUE=(*variables*)**PAYOFFS=**(*variables*)**UTILITY=**(*variables*)**LOSS=**(*variables*)

identifies all variables in the **PAYOFFS=** data set that contain the evaluating values or payoffs for all possible scenarios identified by the outcomes specified by the **STATE=** variables and the outcomes specified by the associated **ACTION=** variables. If the **VALUE=** option is not specified, PROC DTREE looks for the default variable names that have the prefix **_VALU** in the data set. The number of **VALUE=** variables must be equal to the number of **ACTION=** variables if there are any **ACTION=** variables. If there are no **ACTION=** variables in the data set, at least one **STATE=** variable must be in the data set, and the number of **VALUE=** variables must be exactly 1. The **VALUE=** variables must have numeric values.

VPC Statement

VPC *chance-stage-name* ;

The VPC statement causes PROC TREE to compute the value of perfect control (the value of controlling an uncertainty). The effect of perfect control is that you can pick the outcome of an uncertain stage. This value gives an upper limit on the amount you should be willing to spend on any control procedure. Only the name of a chance stage can be used to calculate the value of perfect control. The procedure evaluates the decision tree, if it has not already done so, before computing this value.

VPI Statement

VPI *chance-stage-name* ;

The VPI statement causes PROC DTREE to compute the value of perfect information. The value of perfect information is the benefit of resolving an uncertain stage before making a decision. This value is the upper limit on the improvement that can be expected for any information gathering effort. Only the name of a chance stage can be used to calculate the value of perfect information. The procedure evaluates the decision tree, if it has not already done so, before computing this value.

Details

Input Data Sets

A decision problem is normally constructed in three steps:

1. A structuring of the problem in terms of decisions, uncertainties, and consequences.
2. Assessment of probabilities for the events.
3. Assessment of values (payoffs, losses, or preferences) for each consequence or scenario.

PROC DTREE represents these three steps in three SAS data sets. The **STAGEIN=** data set describes the structure of the problem. In this data set, you define all decisions and define all key uncertainties. This data set also contains the relative order of when decisions are made and uncertainties are resolved (planning horizon). The **PROBIN=** data set assigns probabilities for the uncertain events, and the **PAYOFFS=** data set contains the values (or utility measure) for each consequence or scenario. See the “[Overview](#)” section (beginning on page 343) and the “[Getting Started](#)” section (beginning on page 345) for a description of these three data sets.

PROC DTREE is designed to minimize the rules for describing a problem. For example, the **PROBIN=** data set is required only when the evaluation and analysis of a decision problem is necessary. Similarly, if the **PAYOFFS=** data set is not specified, the DTREE procedure assumes all payoff values are 0. The order of the observations is not important in any of the input data sets. Since a decision problem can be structured in many different ways and the data format is so flexible, all possible ways of describing a given decision problem cannot be shown here. However, some alternate ways of supplying the same problem are demonstrated. For example, the following statements show another way to input the oil wildcatter’s problem described in the “[Introductory Example](#)” section beginning on page 345.

```
data Dtoils3;
  format _STNAME_ $12. _STTYPE_ $2. _OUTCOM_ $10.
         _REWARD_ dollar12.0 _SUCCES_ $12.;
  input _STNAME_ $ _STTYPE_ $ _OUTCOM_ $
```

```

        _REWARD_ dollar12.0 _SUCCES_ $;
    datalines;
Drill      D   Drill      .      Cost
.          .   Not_drill .      .
Cost       C   Low       -$150,000 Oil_deposit
.          .   Fair      -$300,000 Oil_deposit
.          .   High      -$500,000 Oil_deposit
Oil_deposit C   Dry       .      .
.          .   Wet       $700,000 .
.          .   Soaking   $1,200,000 .
;

data Dtoilp3;
    input _EVENT1 $ _PROB1 _EVENT2 $ _PROB2;
    datalines;
Low      0.2   Dry      0.5
Fair     0.6   Wet      0.3
High     0.2   Soaking  0.2
;

title "Oil Wildcatter's Problem";
proc dtree stagein=Dtoils3 probin=Dtoilp3
    nowarning;

    evaluate / summary;

```

Note that the `STAGEIN=` data set describes the problem structure and the payoffs (using the `REWARD=` variable). Thus, the `PAYOFFS=` data set is no longer needed. Note also the changes made to the `PROBIN=` data set. The results, shown in [Figure 5.8](#), are the same as those shown in [Figure 5.2](#) on page 349. However, the rewards and the payoffs are entirely different entities in decision tree models. Recall that the reward of an outcome means the *instant returns* when the *outcome* is realized. On the other hand, the payoffs are the *return* from each *scenario*. In the other words, the decision tree model described in the previous code and the model described in the “[Introductory Example](#)” section beginning on page 345 are not equivalent, even though they have the same optimal decision.

```

Oil Wildcatter's Problem

The DTREE Procedure
Optimal Decision Summary

Order of Stages

Stage          Type
-----
Drill          Decision
Cost           Chance
Oil_deposit    Chance
_ENDST_       End

Decision Parameters

Decision Criterion:  Maximize Expected Value (MAXEV)
Optimal Decision Yields:  140000

Optimal Decision Policy

Up to Stage Drill

Alternatives    Cumulative    Evaluating
or Outcomes     Reward        Value
-----
Drill           0             140000*
Not_drill      0             0

```

Figure 5.8. Optimal Decision Summary of the Oil Wildcatter's Problem

You can try many alternative ways to specify your decision problem. Then you can choose the model that is most convenient and closest to your real problem. If PROC DTREE cannot interpret the input data, it writes a message to that effect to the SAS log unless the `NOWARNING` option is specified. However, there are mistakes that PROC DTREE cannot detect. These often occur after the model has been modified with either the `MOVE` statement or the `MODIFY` statement. After a `MOVE` statement is specified, it is a good idea to display the decision tree (using the `TREEPLOT` statement) and check the probabilities and value assessments to make sure they are reasonable.

For example, using the `REWARD=` variable in the `STAGEIN=` data set to input the payoff information as shown in the previous code may cause problems if you change the order of the stages. Suppose you move the stage '`Cost`' to the beginning of the tree, as was done in the “Sensitivity Analysis and Value of Perfect Information” section on page 351:

```

move Cost before Drill;
evaluate / summary;

```

The optimal decision yields \$140,000, as shown on the optimal decision summary in [Figure 5.9](#).

```

Oil Wildcatter's Problem

The DTREE Procedure
Optimal Decision Summary

Order of Stages

Stage          Type
-----
Cost           Chance
Drill          Decision
Oil_deposit    Chance
_ENDST_        End

Decision Parameters

Decision Criterion:  Maximize Expected Value (MAXEV)
Optimal Decision Yields:  140000

Optimal Decision Policy

Up to Stage Drill

Alternatives    Cumulative    Evaluating
or Outcomes    Reward        Value
-----
Low            Drill         -150000      450000*
Low            Not_drill    -150000      0
Fair           Drill         -300000      450000*
Fair           Not_drill    -300000      0
High           Drill         -500000      450000*
High           Not_drill    -500000      0

```

Figure 5.9. Optimal Decision Summary of the Oil Wildcatter's Problem

Recall that when this was done in the “[Sensitivity Analysis and Value of Perfect Information](#)” section (page 351), the optimal decision yielded \$150,000. The reason for this discrepancy is that the cost of drilling, implemented as (negative) instant rewards here, is imposed on all scenarios including those that contain the outcome '**Not_drill**'. This mistake can be observed easily from the **Cumulative Reward** column of the optimal decision summary shown [Figure 5.9](#).

Changing a decision stage to a chance stage is another example where using the [MODIFY](#) statement without care may cause problems. PROC DTREE cannot determine the probabilities of outcomes for this new chance stage unless they are included in the [PROBIN=](#) data set. In contrast to changing a chance stage to a decision stage (which yields insight on the value of gaining control of an uncertainty), changing a decision stage to a chance stage is not likely to yield any valuable insight even if the needed probability data are included in the [PROBIN=](#) data set, and it should be avoided.

Missing Values

In the `STAGEIN=` data set, missing values are allowed only for the `STAGE=` and `TYPE=` variables when the information of a stage is specified in more than one observation. In this case, missing values for the `STAGE=` and `TYPE=` variables are not allowed for the first observation defining the stage. Missing values for the `OUTCOME=`, `GIVEN=`, `EVENT=`, `STATE=`, and `ACTION=` variables are ignored. Missing values for the `REWARD=`, `PROB=`, and `VALUE=` variables are treated as 0. Missing values for the `SUCCESSOR=` variables are ignored if the value for the corresponding `OUTCOME=` variable is also missing.

Interactivity

The DTREE procedure is interactive. You start the procedure with the `PROC DTREE` statement and terminate it with the `QUIT` statement. It is not necessary to have a `VARIABLES` statement, although if you do include one, it must appear immediately after the `PROC DTREE` statement. The other statements such as the `EVALUATE`, `MODIFY`, `MOVE`, `RECALL`, `RESET`, `SAVE`, `SUMMARY`, `TREEPLOT`, `VPC`, and `VPI`, as well as the `FOOTNOTE`, `GOPTIONS`, `NOTE`, `SYMBOL`, and `TITLE` statements of SAS/GRAPH Software can be used in any order and as often as needed. One exception is that the `RECALL` statement has to be preceded by at least one `SAVE` statement.

When an error is detected during processing a statement other than the `PROC DTREE` statement and the `QUIT` statement, the procedure terminates if the option `ERRHANDLE=QUIT` is specified; otherwise it stops processing the current statement and waits for the next statement. In either case, an error message is written to the SAS log. If an error is detected in the `PROC DTREE` statement or the `QUIT` statement, the procedure terminates immediately with an error message.

Options on Multiple Statements

Many options that can be specified in the `PROC DTREE` statement can also appear in other statements. The options specified in the `PROC DTREE` statement remain in effect for all statements until the end of processing or until they are changed by a `RESET` statement. In this sense, those options are *global* options. The options specified in other statements are in effect only for the statement in which they are specified; hence, they are *local* options. If an option is specified both in the `PROC DTREE` statement and in another statement, the local specification overrides the global specification.

For example, the following statements

```
reset criterion=maxev;
evaluate / criterion=maxce rt=700000;
summary;
```

imply that the decision problem is evaluated and the optimal decision is determined based on the criterion MAXCE with RT=700000. However, the optimal

decision summary produced by the **SUMMARY** statement is based on the option **CRITERION=MAXEV** and not the **MAXCE** criterion. If you want an option to be set permanently, use the **RESET** statement.

The Order of Stages

The order of stages is an important issue in structuring the decision problem. This sets the sequence of events or a time horizon and determines when a decision has to be made and when a chance stage has its uncertainty resolved. If a decision stage precedes another decision stage in the stages order, the decision to the right is made after the decision to the left. Moreover, the choice made in the first decision is remembered by the decision maker when he or she makes the second decision. Any chance stages that occur to the left of a decision stage have their uncertainty resolved before the decision is made. In other words, the decision maker knows what actually happened when he or she makes the decision. However, the order of two chance stages is fairly arbitrary if there are no other decision stages between them. For example, you can change the order of stages '**Cost**' and '**Oil_Deposit**' in the oil wildcatter's problem without affecting the results.

PROC DTREE determines the order (from left to right) of all stages specified in the **STAGEIN=** data set. The ordering is based on the rule that if stage **A** is the successor of an outcome of stage **B**, then stage **A** should occur to the right of (or after) stage **B**. With the **MOVE** statement, you can change this order. The **MOVE** statement is very useful in determining the value (benefit or penalty) of postponing or hurrying a decision. In particular, the *value of perfect information* about an uncertainty can be determined by moving the corresponding chance stage to the beginning. However, as mentioned in early sections, the results may be misleading if you use the **MOVE** statement without care. See the "**Input Data Sets**" section beginning on page 381 for an example.

Suggestions for preventing misleading results are as follows:

- Using the **SAVE** statement, always save the original structure before making any changes.
- Use the **TREEPLOT** statement to display the complete decision tree and check all details after you change the order.

Evaluation

The **EVALUATE** statement causes PROC DTREE to calculate the optimal decision. The evaluate process is done by successive use of two devices:

- Find a certain equivalent for the uncertain evaluating values at each chance node.
- Choose the best alternative at each decision node.

The *certain equivalent* of an uncertainty is the certain amount you would accept in exchange for the uncertain venture. In other words, it is a single number that characterizes an uncertainty described by a probability distribution. This value is subjective and can vary widely from person to person. There are two quantities, closely related to the certain equivalent, that are commonly used by decision-makers: the most likely value and the expected value. The *most likely value* of an uncertainty is the value with the largest probability. The *expected value* is the sum of all outcomes multiplied by their probabilities.

Perhaps the most popular way to find the certain equivalent for an uncertainty is the use of *utility function* or *utility curve*. *Utility* is a measurement of relative *preference* to the decision maker for particular outcomes. The utility function assigns a utility to payoff when it is in terms of continuous values such as money. The certain equivalent of an uncertainty (a random variable) is calculated by the following steps:

1. Use the utility function or the utility curve to find the utility values of the outcomes.
2. Calculate the expected utility of the uncertainty.
3. Determine the certain equivalent of the uncertainty as the value that corresponding utility value is the expected utility.

Refer to Raiffa (1970) for a complete discussion of the utility function.

A simple case that is commonly used is the straight line utility curve or the linear utility function. The linear utility function has the form

$$u(x) = a + bx$$

where x is the evaluating value, and a and b are parameters set by the choice of two points in the utility curve. For example, if the utility curve passes two points $u(0) = 0$ and $u(1000) = 1$, then parameters a and b are set by $a = 0$ and $b = 1/1000$. The certain equivalent of an uncertainty based on this function is the expected value.

Another special case that is commonly used is the exponential utility function, as

$$u(x) = a - b \times \exp(-x/r)$$

where, again, a and b can be set by the choice of two arbitrary points in the utility curve. For example, if your utility curve goes through points $(0, 0)$ and $(1000, 1)$, then a and b are given by

$$a = b = 1/[1 - \exp(-1000/r)]$$

If an uncertain venture A has n events, event i having probability p_i and payoff x_i , and if the utility function is an exponential function as in the preceding example, then the certain equivalent of A is

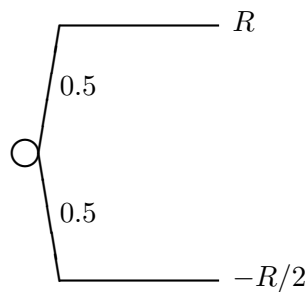
$$\text{CE}(A) = -r \ln \left[\sum_{i=1}^n p_i \exp(-x_i/r) \right]$$

and is independent of the choice of values for a and b (provided that $b > 0$) (Raiffa 1970).

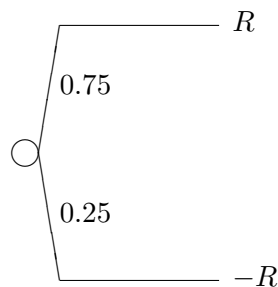
The parameter r , called the *risk tolerance*, describes the curvature of the utility function. Moreover, the quantity $1/r$, called *risk aversion coefficient* (Howard 1968) is a measure of risk aversion.

Experimental results show that within a reasonable range of values, many utility curves can be fit quite well by an exponential function.

If your utility function is an exponential function as in the preceding example, the risk tolerance can be estimated by the largest number R for which the following venture is still acceptable to you.



A similar way to approximate the risk tolerance is to find the largest value R for which the venture is acceptable (Howard 1988).



For corporate decision making, there are some rules of thumb for estimating the risk tolerance. Examples are to set risk tolerance about equal to one of the following:

- net income of the company

- one sixth of equity
- six percent of net sales

To reveal how well these rules perform in assessing corporate risk tolerance, Howard (1988) provided the following two tables: [Table 5.26](#) shows the relationship between the risk tolerance and financial measures of four large oil and chemicals companies. There, the risk tolerances are obtained from the top executives of the companies. The net sales, net income, and equity are obtained from the annual reports of the four companies.

Table 5.26. Relating Corporate Risk Tolerance to Financial Measures

Measure (\$ millions)	Company			
	A	B	C	D
Net Sales	2,300	3,307	16,000	31,000
Net Income	120	152	700	1,900
Equity	1,000	1,153	6,500	12,000
Risk Tolerance	150	200	1,000	2,000

[Table 5.27](#) shows the ratio of risk tolerance to each of the other quantities.

Table 5.27. Ratios of Corporate Risk Tolerance to Financial Measures

Measure	Company				Average
	A	B	C	D	
RT/Sales	0.0652	0.0605	0.0625	0.0645	0.0632
RT/Income	1.25	1.32	1.43	1.05	1.26
RT/Equity	0.150	0.174	0.154	0.167	0.161

Once the certain equivalents for all chance nodes are assessed, the choice process at each decision node is fairly simple; select the alternative yielding either the maximum or the minimum (depending on the problem) future certain equivalent value.* You can use the `CRITERION=` option to control the way the certain equivalent is calculated for each chance node and the optimal alternative is chosen at each decision node. Possible values for the `CRITERION=` option are listed in [Table 5.19](#) on page 361. If you use an exponential utility function, the `RT=` option can be used to specify your risk tolerance. You also have control over how to present the solution. By default, PROC DTREE writes the value of the optimal decisions to the SAS log. In addition, with the `SUMMARY` option, you can ask PROC DTREE to display the optimal decision summary to the output.

*The future certain equivalent value is often referred to as the evaluating value in this documentation.

Displayed Output

The **SUMMARY** statement and the **SUMMARY** option in an **EVALUATE** statement cause PROC DTREE to display an optimal decision summary for the decision model. This output is organized into various tables, and they are discussed in order of appearance.

Order of stages

The “Order of stages” table lists all stages, and their types, in order of appearance in the decision model. See the “[The Order of Stages](#)” section on page 386 for details.

For ODS purposes, the label of the “Order of stages” table is “Stages.”

Decision Parameters

The “Decision Parameters” table describes the criterion used for determining the optimal decision and the certain equivalent for replacing uncertainties. If you specify the option **CRITERION=MAXCE** or **CRITERION=MINCE** in the **PROC DTREE** statement or in the **EVALUATE** statement, an additional row is added to the table listing the value of the risk tolerance. It also contains a row showing the value of the optimal decision yields. For additional information, see the “[Evaluation](#)” section beginning on page 386.

For ODS purposes, the label of the “Decision Parameters” table is “Parameters.”

Optimal Decision Policy

By default, PROC DTREE produces an “Optimal Decision Policy” table for each decision stage. You can use the **TARGET=** option to force PROC DTREE to produce only one table for a particular stage. The Alternatives or Outcomes columns list the events in the scenario that leads to the current stage. The Cumulative Reward column lists the rewards accumulated along the scenario to the events of the current target stage. The Evaluating Value column lists the values that can be expected from the events of the target stage. An asterisk (*) is placed beside an evaluating value indicates the current event is the best alternative of the given scenario.

For ODS purposes, the label of the “Optimal Decision Policy” table is “Policy.”

Displaying the Decision Tree

PROC DTREE draws the decision tree either in line-printer mode or in graphics mode. However, you need to have SAS/GRAPH software licensed at your site to use graphics mode. In many cases, the procedure draws the decision tree across page boundaries. If the decision tree diagram is drawn on multiple pages, the procedure numbers each page of the diagram on the upper right corner of the page (unless the **NOPAGENUM** option is specified). The pages are numbered starting with the upper left corner of the entire diagram. Thus, if the decision tree diagram is broken into three horizontal and four vertical levels and you want to paste all the pieces together to form one picture, they should be arranged as shown in [Figure 5.10](#).

1	5	9
2	6	10
3	7	11
4	8	12

Figure 5.10. Page Layout of the Decision Tree Diagram

The number of pages that are produced depends on the size of the tree and on the number of print positions that are available in the horizontal and vertical directions. [Table 5.28](#) lists all options you can use to control the number of pages.

Table 5.28. Options That Control the Number of Pages

Option	Effect
DISPLAY=	amounts of information displayed on the diagram
MAXPREC=	maximum decimal width allowed (the precision) to format numerical values into <i>w.d</i> format
MAXWIDTH=	maximum field width allowed to format numerical values
NOLABEL	no labels are displayed on the diagram
NWIDTH=	maximum field width allowed to format outcome names
YBETWEEN=	vertical spaces between two successive end nodes

If the **GRAPHICS** option is used, the following options can be used to control the number of pages:

- The **COMPRESS** option draws the entire decision tree on one page.
- The **HSYMBOL=** option controls the height of all symbols.
- The **HTEXT=** option controls the height of text in the tree.
- The **HEIGHT=** option in a **SYMBOL** definition specifies the height of a symbol.
- The **HTEXT=** option in a **GOPTIONS** statement specifies the height of all text.
- The **HTITLE=** option in a **GOPTIONS** statement specifies the height of the first title line.

- The HPOS= and VPOS= options in a GOPTIONS statement change the number of rows and columns.

Note that the font used for all text may also affect the number of pages needed. Some fonts take more space than others.

If the decision tree diagram is produced on a line printer, you can use the **FORMCHAR=** option to control the appearance the links and the junctions of the diagram. When the **GRAPHICS** options is specified, several options are available to enhance the appearance of the decision tree diagram. These are described in the “Graphics Options” section on page 364. In addition, there are many other options available in the GOPTIONS statement and the SYMBOL statement for controlling the details of graphics output. Refer to the relevant chapters in *SAS/GRAPH Software: Reference* for a detailed discussion of the GOPTIONS and SYMBOL statements.

Table 5.29, Table 5.30, and Table 5.31, show the relationship among the options for controlling the appearance of texts, nodes, and links, respectively. The order that PROC DTREE uses in determining which option is in effect is also provided.

For ODS purposes, the label of the decision tree diagram drawn in line-printer quality is “Treeplot.”

Table 5.29. Options That Control Text Appearance

Object	Specification	Search Order
Text	Font	<ol style="list-style-type: none"> 1. the FTEXT= option 2. the FTEXT= option in a GOPTIONS statement 3. hardware font
	Color	<ol style="list-style-type: none"> 1. the CTEXT= option 2. the CTEXT= option in a GOPTIONS statement 3. the first color in the colors list
	Height	<ol style="list-style-type: none"> 1. the value of the HTEXT= option⁵ times the value of the HTEXT= option⁶ in a GOPTIONS statement

⁵If this option is not specified, the default value 1 is used.

⁶The default value of this option is 1 unit.

Table 5.30. Options That Control Node Appearance

Object	Specification	Search Order
Chance Nodes	Symbol	<ol style="list-style-type: none"> 1. the VSYMBOLC= option 2. the VALUE= and FONT= options in the <i>m</i>th generated SYMBOL definition, if SYMBOLC=<i>m</i> is used 3. the default symbol, CIRCLE
	Color	<ol style="list-style-type: none"> 1. the CSYMBOLC= option 2. the CV= option in the <i>m</i>th generated SYMBOL definition, if SYMBOLC=<i>m</i> is used 3. the CSYMBOL= option in a GOPTIONS statement 4. the fifth color in the colors list
	Height	<ol style="list-style-type: none"> 1. <i>h</i> times the value of the HEIGHT= option in the <i>m</i>th generated SYMBOL definition, if both the HSYMBOL=<i>h</i> and the SYMBOLC=<i>m</i> are specified 2. the HSYMBOL= option, if it is specified 3. the HEIGHT= option in the <i>m</i>th generated symbol definition, if SYMBOLC=<i>m</i> is used. 4. the default value, 1 cell
Decision Nodes	Symbol	<ol style="list-style-type: none"> 1. the VSYMBOLD= option 2. the VALUE= and FONT= options in the <i>d</i>th generated SYMBOL definition, if SYMBOLD=<i>d</i> is used 3. the default value, SQUARE
	Color	<ol style="list-style-type: none"> 1. the CSYMBOLD= option 2. the CV= option in the <i>d</i>th generated SYMBOL definition, if SYMBOLD=<i>d</i> is used 3. the CSYMBOL= option in a GOPTIONS statement 4. the fourth color in the colors list
	Height	<ol style="list-style-type: none"> 1. <i>h</i> times the value of the HEIGHT= option in the <i>d</i>th generated SYMBOL definition, if both the HSYMBOL=<i>h</i> and the SYMBOLD=<i>d</i> are specified 2. the HSYMBOL= option, if it is specified 3. the HEIGHT= option in the <i>d</i>th generated symbol definition, if SYMBOLD=<i>d</i> is used. 4. the default value, 1 cell
End Nodes	Symbol	<ol style="list-style-type: none"> 1. the VSYMBOLLE= option 2. the VALUE= and FONT= options in the <i>n</i>th generated SYMBOL definition, if SYMBOLLE=<i>n</i> is used 3. the default value, DOT
	Color	<ol style="list-style-type: none"> 1. the CSYMBOLLE= option 2. the CV= option in the <i>n</i>th generated SYMBOL definition if the option SYMBOLLE=<i>n</i> is specified 3. the CSYMBOL= option in a GOPTIONS statement 4. the sixth color in the colors list
	Height	<ol style="list-style-type: none"> 1. <i>h</i> times the value of the HEIGHT= option in the <i>n</i>th generated SYMBOL definition, if both the HSYMBOL=<i>h</i> and the SYMBOLLE=<i>n</i> are specified 2. the HSYMBOL= option, if it is specified 3. the HEIGHT= option in the <i>n</i>th generated symbol definition, if SYMBOLLE=<i>n</i> is used. 4. the default value, 1 cell

Table 5.31. Options That Control Link Appearance

Object	Specification	Search Order
Links for Regular Outcomes	Type	<ol style="list-style-type: none"> the <code>LSTYLE=</code> option the <code>LINE=</code> in the ith generated SYMBOL definition, if <code>LINKA=i</code> is used the default value, 1 (solid line)
	Color	<ol style="list-style-type: none"> the <code>CLINK=</code> option the <code>CI=</code> option in the ith generated SYMBOL definition, if <code>LINKA=i</code> is used the third color in the colors list
	Thickness	<ol style="list-style-type: none"> the <code>LWIDTH=</code> option the <code>WIDTH=</code> option in the ith generated SYMBOL definition, if <code>LINKA=i</code> is used the default value, 1
Links for Optimal Decision	Type	<ol style="list-style-type: none"> the <code>LSTYLEB=</code> option the <code>LINE=</code> in the jth generated SYMBOL definition, if <code>LINKB=j</code> is used the default value, 1 (solid line)
	Color	<ol style="list-style-type: none"> the <code>CBEST=</code> option the <code>CI=</code> option in the jth generated SYMBOL definition, if <code>LINKB=j</code> is used the second color in the colors list
	Thickness	<ol style="list-style-type: none"> the <code>LWIDTHB=</code> option the <code>WIDTH=</code> option in the jth generated SYMBOL definition, if <code>LINKB=j</code> is used 2 times the thickness of links that represent regular outcomes
Links That Fall Across Pages	Type	<ol style="list-style-type: none"> the <code>LSTYLEC=</code> option the <code>LINE=</code> in the kth generated SYMBOL definition, if <code>LINKC=k</code> is used the default value, 2 (dot line)
	Color	1. depends on whether or not it represents an optimal decision
	Thickness	1. depends on whether or not it represents an optimal decision

Web-Enabled Decision Tree

The `WEB=` variable in the `STAGEIN=` data set enables you to define an HTML reference for each stage. This HTML reference is currently associated with all the decision tree nodes that correspond to the stage. The `WEB=` variable is a character variable, and the values need to be of the form `HREF=htmlpage`.

In addition, you can also store the coordinate and link information defined by the `WEB=` option in a SAS data set by specifying the `IMAGEMAP=` option in the `PROC DTREE` statement or in the `TREEPLOT` statement. By processing this SAS data set using a DATA step, you can generate customized HTML pages for your decision tree diagram.

ODS Table Names

PROC DTREE assigns a name to each table it creates. You can use these names to reference the table when using the Output Delivery System (ODS) to select tables and create output data sets. These names are listed in the following table. For more information on ODS, refer to the chapter on ODS in the *SAS/STAT User's Guide*.

Table 5.32. ODS Tables Produced in PROC DTREE

ODS Table Name	Description	Statement / Option
Parameters	Decision parameters	<code>SUMMARY</code> or <code>EVALUATE / SUMMARY</code>
Policy	Optimal decision policy	<code>SUMMARY</code> or <code>EVALUATE / SUMMARY</code>
Stages	List of stages in order	<code>SUMMARY</code> or <code>EVALUATE / SUMMARY</code>
Treeplot	Line-printer plot of decision tree	<code>TREEPLOT / LINEPRINTER</code>

Precision Errors

When PROC DTREE detects an error, it displays a message on the SAS log to call it to your attention. If the error is in a statement other than the `PROC DTREE` statement and the `QUIT` statement, and if the `ERRHANDLE=QUIT` option is not specified, the procedure ignores the erroneous statement and waits for you to enter another statement. This gives you a chance to correct the mistake you made and keep running. You can exit the procedure at any time by specifying the `QUIT` statement.

If the error is in an input data set, typically, you will have to edit the data set and then reinvoke PROC DTREE. In one case, however, you can use an option to correct the problem. You may receive an error message indicating that the sum of probabilities for a particular chance stage does not equal 1.0. If it is caused by roundoff errors in the summation, then you can reset the `TOLERANCE=` option to correct this error. For example, suppose that your problem contains a chance stage that has three outcomes, 'Out1', 'Out2' and 'Out3', and each has probability 1/3. Suppose also that you input their probabilities in the `PROBIN=` data set as follows:

```
Out1    Out2    Out3    0.3333  0.3333  0.3333
```

Then, PROC DTREE detects the total probabilities for that stage as 0.9999, not equal to 1, and hence displays an error message. The following `RESET` statement fixes the error:

```
reset tolerance=0.00015;
```

Alternatively, you can specify the `AUTOSCALE` option to ask the procedure to rescale the probabilities whenever this situation occurs.

Computer Resource Requirements

There is no inherent limit on the size of the decision tree model that can be evaluated and analyzed with the DTREE procedure. The numbers of stages and outcomes are constrained only by the amount of memory available. Naturally, there needs to be a sufficient amount of core memory available in order to invoke and initialize the SAS system. Furthermore, more memory is required to load the graphics sublibrary if the **GRAPHICS** option is specified. As far as possible, the procedure attempts to store all the data in core memory. However, if the problem is too large to fit in core memory, the procedure resorts to the use of utility data sets and swaps between core memory and utility data sets as necessary.

The storage requirement for the data area required by the procedure is proportional to the number of stages and outcomes as well as the number of nodes* in the decision tree model. The time required depends heavily on the number of nodes in the decision tree.

Examples

This section contains six examples that illustrate several features and applications of the DTREE procedure. The aim of this section is to show you how to use PROC DTREE to solve your decision problem and gain valuable insight into its structure.

[Example 5.1](#) on page 397 and [Example 5.2](#) on page 402 show two methods frequently used to spread the risk of a venture: buy insurance and enter a partnership. [Example 5.1](#) also illustrates the use of the VARIABLE statement to identify the variables in the input data sets. [Example 5.3](#) on page 413 illustrates the use of the graphics options to produce a graphics quality decision tree diagram. [Example 5.4](#) on page 418 illustrates the use of SYMBOL and GOPTIONS statements and the Annotate facility to control the appearance of the decision tree diagram. [Example 5.5](#) on page 422 demonstrates an application of PROC DTREE for financial decision problems. It also illustrates a situation where redundant data are necessary to determine the value of information. In addition, it shows a case where the results from the VPI and VPC statements are misleading if they are used without care. [Example 5.6](#) on page 431 shows an application in litigation, a sophisticated use of sensitivity analysis. It also shows you how to deal with the value of future money.

Finally, [Table 5.40](#) (page 441) and [Table 5.41](#) (page 441) list all the examples in this chapter, and the options and statements in the DTREE procedure that are illustrated by each example.

*The number of nodes depends on the number of stages and the number of outcomes for each stage.

Example 5.1. Oil Wildcatter's Problem with Insurance

Again consider the oil wildcatter's problem introduced in the "Introductory Example" section beginning on page 345. Suppose that the wildcatter is concerned that the probability of a dry well may be as high as 0.5.

The wildcatter has learned that an insurance company is willing to offer him a policy that, with a premium of \$130,000, will redeem \$200,000 if the well is dry. He would like to include the alternative of buying insurance into his analysis. One way to do this is to include a stage for this decision in the model. The following DATA step reads this new decision problem into the STAGEIN= data set named Dtoils4. Notice the new stage named 'Insurance', which represents the decision of whether or not to buy the insurance. Also notice that the cost of the insurance is represented as a negative reward of \$130,000.

```

/* -- create the STAGEIN= data set                                -- */
data Dtoils4;
  format Stage $12. Stype $2. Outcome $14.
         Succ $12. Premium dollar12.0;
  input Stage $ Stype $ Outcome $ Succ $
         Premium dollar12.0;
  datalines;
Drill      D      Drill      Insurance      .
.          .      Not_Drill  .              .
Insurance  D      Buy_Insurance Cost          -$130,000
.          .      Do_Not_Buy  Cost          .
Cost       C      Low          Oil_Deposit   .
.          .      Fair        Oil_Deposit   .
.          .      High        Oil_Deposit   .
Oil_Deposit C      Dry          .              .
.          .      Wet          .              .
.          .      Soaking     .              .
;

```

Probabilities associated with the uncertain events are given in the PROBIN= data set named Dtoilp4. Except for the order of the variables in this data set, it is the same as the Dtoilp1 data set given in the "Introductory Example" section beginning on page 345.

```

/* -- create the PROBIN= data set                                -- */
data Dtoilp4;
  input (V1-V3) ($) P1-P3 ;
  datalines;
Low        Fair        High        0.2        0.6        0.2
Dry        Wet         Soaking    0.5        0.3        0.2
;

```

The payoffs for this problem are now calculated to include the cost and value of the insurance. The following DATA step does this.

```

/* -- create PAYOFFS= data set                                -- */
data Dtoilu4;
  format Drill $9. Insuran $14. Payoff dollar12.0;
  input Cost $ Deposit $ Drill $ Insuran $ ;

/* determine the cost for this scenario */
if      Cost='Low'   then Rcost=150000;
else if Cost='Fair' then Rcost=300000;
else                                     Rcost=500000;

/* determine the oil deposit and the corresponding */
/* net payoff for this scenario                    */
if      Deposit='Dry' then Return=0;
else if Deposit='Wet' then Return=700000;
else                                     Return=1200000;

/* calculate the net return for this scenario */
if      Drill='Not_Drill' then Payoff=0;
else                                     Payoff=Return-Rcost;

/* determine redeem received for this scenario */
if Insuran='Buy_Insurance' and Deposit='Dry' then
  Payoff=Payoff+200000;

/* drop unneeded variables */
drop Rcost Return;

datalines;
Low      Dry      Not_Drill      .
Low      Dry      Drill      Buy_Insurance
Low      Dry      Drill      Do_Not_Buy
Low      Wet      Not_Drill      .
Low      Wet      Drill      Buy_Insurance
Low      Wet      Drill      Do_Not_Buy
Low      Soaking  Not_Drill      .
Low      Soaking  Drill      Buy_Insurance
Low      Soaking  Drill      Do_Not_Buy
Fair     Dry      Not_Drill      .
Fair     Dry      Drill      Buy_Insurance
Fair     Dry      Drill      Do_Not_Buy
Fair     Wet      Not_Drill      .
Fair     Wet      Drill      Buy_Insurance
Fair     Wet      Drill      Do_Not_Buy
Fair     Soaking  Not_Drill      .
Fair     Soaking  Drill      Buy_Insurance
Fair     Soaking  Drill      Do_Not_Buy
High    Dry      Not_Drill      .
High    Dry      Drill      Buy_Insurance
High    Dry      Drill      Do_Not_Buy
High    Wet      Not_Drill      .
High    Wet      Drill      Buy_Insurance
High    Wet      Drill      Do_Not_Buy
High    Soaking  Not_Drill      .
High    Soaking  Drill      Buy_Insurance

```

```
High           Soaking           Drill           Do_Not_Buy
;

```

The payoff table can be displayed with the following PROC PRINT statement:

```
/* -- print the payoff table           -- */
title "Oil Wildcatter's Problem";
title3 "The Payoffs";

proc print data=Dtoilu4;
run;

```

The table is shown in [Output 5.1.1](#).

Output 5.1.1. Payoffs of the Oil Wildcatter's Problem with an Insurance Option

Oil Wildcatter's Problem					
The Payoffs					
Obs	Cost	Deposit	Drill	Insuran	Payoff
1	Low	Dry	Not_Drill		\$0
2	Low	Dry	Drill	Buy_Insurance	\$50,000
3	Low	Dry	Drill	Do_Not_Buy	-\$150,000
4	Low	Wet	Not_Drill		\$0
5	Low	Wet	Drill	Buy_Insurance	\$550,000
6	Low	Wet	Drill	Do_Not_Buy	\$550,000
7	Low	Soaking	Not_Drill		\$0
8	Low	Soaking	Drill	Buy_Insurance	\$1,050,000
9	Low	Soaking	Drill	Do_Not_Buy	\$1,050,000
10	Fair	Dry	Not_Drill		\$0
11	Fair	Dry	Drill	Buy_Insurance	-\$100,000
12	Fair	Dry	Drill	Do_Not_Buy	-\$300,000
13	Fair	Wet	Not_Drill		\$0
14	Fair	Wet	Drill	Buy_Insurance	\$400,000
15	Fair	Wet	Drill	Do_Not_Buy	\$400,000
16	Fair	Soaking	Not_Drill		\$0
17	Fair	Soaking	Drill	Buy_Insurance	\$900,000
18	Fair	Soaking	Drill	Do_Not_Buy	\$900,000
19	High	Dry	Not_Drill		\$0
20	High	Dry	Drill	Buy_Insurance	-\$300,000
21	High	Dry	Drill	Do_Not_Buy	-\$500,000
22	High	Wet	Not_Drill		\$0
23	High	Wet	Drill	Buy_Insurance	\$200,000
24	High	Wet	Drill	Do_Not_Buy	\$200,000
25	High	Soaking	Not_Drill		\$0
26	High	Soaking	Drill	Buy_Insurance	\$700,000
27	High	Soaking	Drill	Do_Not_Buy	\$700,000

To find the optimal decision, call PROC DTREE with the following statements:

```
/* -- PROC DTREE statements           -- */
title "Oil Wildcatter's Problem";

proc dtree stagein=Dtoils4
           probin=Dtoilp4
           payoffs=Dtoilu4

```

```

nowarning
;

variables / stage=Stage type=Stype outcome=(Outcome)
           reward=(Premium) successor=(Succ)
           event=(V1 V2 V3) prob=(P1 P2 P3)
           state=(Cost Deposit Drill Insuran)
           payoff=(Payoff);

evaluate;

summary / target=Insurance;

```

The **VARIABLES** statement identifies the variables in the input data sets. The yield of the optimal decision is written to the SAS log as:

NOTE: Present order of stages:

```

Drill (D), Insurance (D), Cost (C), Oil_Deposit (C),
_ENDST_ (E) .

```

NOTE: The currently optimal decision yields 140000.

The optimal decision summary produced by the **SUMMARY** statements are shown in [Output 5.1.2](#). The summary in [Output 5.1.2](#) shows that the insurance policy is worth $\$240,000 - \$140,000 = \$100,000$, but since it costs $\$130,000$, the wildcatter should reject such an insurance policy.

Output 5.1.2. Summary of the Oil Wildcatter's Problem

```

Oil Wildcatter's Problem

The DTREE Procedure
Optimal Decision Summary

Order of Stages

Stage          Type
-----
Drill          Decision
Insurance      Decision
Cost           Chance
Oil_Deposit    Chance
_ENDST_       End

Decision Parameters

Decision Criterion:  Maximize Expected Value (MAXEV)
Optimal Decision Yields:  $140,000

Optimal Decision Policy

Up to Stage Insurance

Alternatives or Outcomes      Cumulative      Evaluating
                               Reward             Value
-----
Drill          Buy_Insurance      -130000        $240,000
Drill          Do_Not_Buy           0              $140,000*
    
```

Now assume that the oil wildcatter is risk averse and has an exponential utility function with a risk tolerance of \$1,200,000. In order to evaluate his problem based on this decision criterion, the wildcatter reevaluates the problem with the following statements:

```

reset criterion=maxce rt=1200000;
summary / target=Insurance;
    
```

The output from PROC DTREE given in [Output 5.1.3](#) shows that the decision to purchase an insurance policy is favorable in the risk-averse environment. Note that an `EVALUATE` statement is not necessary before the `SUMMARY` statement. PROC DTREE evaluates the decision tree automatically when the decision criterion has been changed using the `RESET` statement.

Output 5.1.3. Summary of the Oil Wildcatter's Problem with RT = 1, 200, 000

Oil Wildcatter's Problem			
The DTREE Procedure			
Optimal Decision Summary			
Order of Stages			
Stage	Type		
Drill	Decision		
Insurance	Decision		
Cost	Chance		
Oil_Deposit	Chance		
ENDST	End		
Decision Parameters			
Decision Criterion:	Maximize Certain Equivalent Value (MAXCE)		
Risk Tolerance:	\$1,200,000		
Optimal Decision Yields:	\$45,728		
Optimal Decision Policy			
Up to Stage Insurance			
Alternatives or Outcomes		Cumulative Reward	Evaluating Value
Drill	Buy_Insurance	-130000	\$175,728*
Drill	Do_Not_Buy	0	\$44,499

Example 5.2. Oil Wildcatter's Problem in Risk-Averse Setting

Continuing with the oil wildcatter's problem, suppose that in addition to possibly buying insurance to spread the risk of the venture, the wildcatter is considering sharing the risk by selling a portion of this venture to other investors. Now, the decision he faces is whether to buy insurance or not and what percentage of the investment to divest. Again, assume that the wildcatter is risk averse with a risk tolerance of \$1,200,000. Notice that in the program that follows the '**Divestment**' decision includes possibilities of no divestment to 100% divestment in 10% increments.

```

/* -- create the STAGEIN= data set                                -- */
data Dtoils4;
  format _STNAME_ $12. _OUTCOM_ $15. _SUCCES_ $12.;
  input _STNAME_ $ _STTYPE_ $ _OUTCOM_ $
        _SUCCES_ $ ;
  datalines;
Divestment      Decision      No_Divestment      Insurance
.               .             10%_Divestment    Insurance
.               .             20%_Divestment    Insurance
.               .             30%_Divestment    Insurance
.               .             40%_Divestment    Insurance
.               .             50%_Divestment    Insurance

```



```

.          .          60%_Divestment      Insurance
.          .          70%_Divestment      Insurance
.          .          80%_Divestment      Insurance
.          .          90%_Divestment      Insurance
.          .          100%_Divestment     .
Insurance  Decision  Buy_Insurance        Cost
.          .          Do_Not_Buy         Cost
Cost       Chance   Low                   Oil_Deposit
.          .          Fair                 Oil_Deposit
.          .          High                 Oil_Deposit
Oil_Deposit Chance  Dry                   .
.          .          Wet                   .
.          .          Soaking                .
;

```

The probabilities associated with the uncertain events are given in the `PROBIN=` data set named `Dtoilp4`. Except for the order of the variables in this data set, it is the same as the `Dtoilp1` data set used in the “[Introductory Example](#)” section beginning on page 345.

```

/* -- create the PROBIN= data set -- */
data Dtoilp4;
  input _EVENT1 $ _PROB1 _EVENT3 $ _PROB3 ;
  datalines;
Low      0.2      Dry      0.5
Fair     0.6      Wet      0.3
High     0.2      Soaking 0.2
;

/* -- create the PAYOFFS= data set -- */
data Dtoilu4(drop=i j k l);
  length _STATE1-_STATE4 $16. ;
  format _VALUE_ dollar12.0;

/* define and initialize arrays */
array DIVEST{11} $16. _TEMPORARY_ ('No_Divestment',
                                   '10%_Divestment',
                                   '20%_Divestment',
                                   '30%_Divestment',
                                   '40%_Divestment',
                                   '50%_Divestment',
                                   '60%_Divestment',
                                   '70%_Divestment',
                                   '80%_Divestment',
                                   '90%_Divestment',
                                   '100%_Divestment' );
array INSUR{3} $16. _TEMPORARY_ ('Do_Not_Buy',
                                 'Buy_Insurance',
                                 ' ');
array COST{4} $ _TEMPORARY_ ('Low',
                              'Fair',
                              'High',

```

```

                                ' '                                );
array DEPOSIT{4} $      _TEMPORARY_ ('Dry',
                                'Wet',
                                'Soaking',
                                ' '                                );

do i=1 to 10;                /* loop for each divestment */
  _STATE1=DIVEST{i};

  /* determine the percentage of ownership */
  /* retained for this scenario          */
  PCT=1.0-((i-1)*0.1);

  do j=1 to 2;              /* loop for insurance decision */
    _STATE2=INSUR{j};

    /* determine the premium need to pay */
    /* for this scenario                  */
    if _STATE2='Buy_Insurance' then PREMIUM=130000;
    else                          PREMIUM=0;

    do k=1 to 3;            /* loop for each well cost */
      _STATE3=COST{k};

      /* determine the cost for this scenario */
      if      _STATE3='Low' then _COST_=150000;
      else if _STATE3='Fair' then _COST_=300000;
      else                          _COST_=500000;

      do l=1 to 3; /* loop for each deposit type */
        _STATE4=DEPOSIT{l};

        /* determine the oil deposit and the */
        /* corresponding net payoff for this */
        /* scenario                          */
        if      _STATE4='Dry' then _PAYOFF_=0;
        else if _STATE4='Wet' then _PAYOFF_=700000;
        else                          _PAYOFF_=1200000;

        /* determine redeem received for this */
        /* scenario                          */
        if _STATE2='Buy_Insurance' and _STATE4='Dry' then
          REDEEM=200000;
        else REDEEM=0;

        /* calculate the net return for this */
        /*scenario                          */
        _VALUE_=( _PAYOFF_ - _COST_ - PREMIUM + REDEEM ) * PCT;

        /* drop unneeded variables */
        drop _COST_ _PAYOFF_ PREMIUM REDEEM PCT;

        /* output this record */
        output;

```

```
        end;
      end;
    end;
  end;

  /* output an observation for the scenario */
  /* 100% Divestment */
  _STATE1=DIVEST{11};
  _STATE2=INSUR{3};
  _STATE3=COST{4};
  _STATE4=DEPOSIT{4};
  _VALUE_=0;
  output;

run;
```

The Dtoilu4 data set for this problem, which contains 181 observations and 5 variables, is displayed in [Output 5.2.1](#).

Output 5.2.1. Payoffs of the Oil Wildcatter's Problem with Risk Sharing

Oil Wildcatter's Problem					
The Payoffs					
Obs	_STATE1	_STATE2	_STATE3	_STATE4	_VALUE_
1	No_Divestment	Do_Not_Buy	Low	Dry	\$-150,000
2	No_Divestment	Do_Not_Buy	Low	Wet	\$550,000
3	No_Divestment	Do_Not_Buy	Low	Soaking	\$1,050,000
4	No_Divestment	Do_Not_Buy	Fair	Dry	\$-300,000
5	No_Divestment	Do_Not_Buy	Fair	Wet	\$400,000
6	No_Divestment	Do_Not_Buy	Fair	Soaking	\$900,000
7	No_Divestment	Do_Not_Buy	High	Dry	\$-500,000
8	No_Divestment	Do_Not_Buy	High	Wet	\$200,000
9	No_Divestment	Do_Not_Buy	High	Soaking	\$700,000
10	No_Divestment	Buy_Insurance	Low	Dry	\$-80,000
11	No_Divestment	Buy_Insurance	Low	Wet	\$420,000
12	No_Divestment	Buy_Insurance	Low	Soaking	\$920,000
13	No_Divestment	Buy_Insurance	Fair	Dry	\$-230,000
14	No_Divestment	Buy_Insurance	Fair	Wet	\$270,000
15	No_Divestment	Buy_Insurance	Fair	Soaking	\$770,000
16	No_Divestment	Buy_Insurance	High	Dry	\$-430,000
17	No_Divestment	Buy_Insurance	High	Wet	\$70,000
18	No_Divestment	Buy_Insurance	High	Soaking	\$570,000
19	10%_Divestment	Do_Not_Buy	Low	Dry	\$-135,000
20	10%_Divestment	Do_Not_Buy	Low	Wet	\$495,000
21	10%_Divestment	Do_Not_Buy	Low	Soaking	\$945,000
22	10%_Divestment	Do_Not_Buy	Fair	Dry	\$-270,000
23	10%_Divestment	Do_Not_Buy	Fair	Wet	\$360,000
24	10%_Divestment	Do_Not_Buy	Fair	Soaking	\$810,000
25	10%_Divestment	Do_Not_Buy	High	Dry	\$-450,000
26	10%_Divestment	Do_Not_Buy	High	Wet	\$180,000
27	10%_Divestment	Do_Not_Buy	High	Soaking	\$630,000
28	10%_Divestment	Buy_Insurance	Low	Dry	\$-72,000
29	10%_Divestment	Buy_Insurance	Low	Wet	\$378,000
30	10%_Divestment	Buy_Insurance	Low	Soaking	\$828,000
31	10%_Divestment	Buy_Insurance	Fair	Dry	\$-207,000
32	10%_Divestment	Buy_Insurance	Fair	Wet	\$243,000
33	10%_Divestment	Buy_Insurance	Fair	Soaking	\$693,000
34	10%_Divestment	Buy_Insurance	High	Dry	\$-387,000
35	10%_Divestment	Buy_Insurance	High	Wet	\$63,000
36	10%_Divestment	Buy_Insurance	High	Soaking	\$513,000
37	20%_Divestment	Do_Not_Buy	Low	Dry	\$-120,000
38	20%_Divestment	Do_Not_Buy	Low	Wet	\$440,000
39	20%_Divestment	Do_Not_Buy	Low	Soaking	\$840,000
40	20%_Divestment	Do_Not_Buy	Fair	Dry	\$-240,000
41	20%_Divestment	Do_Not_Buy	Fair	Wet	\$320,000
42	20%_Divestment	Do_Not_Buy	Fair	Soaking	\$720,000
43	20%_Divestment	Do_Not_Buy	High	Dry	\$-400,000
44	20%_Divestment	Do_Not_Buy	High	Wet	\$160,000
45	20%_Divestment	Do_Not_Buy	High	Soaking	\$560,000
46	20%_Divestment	Buy_Insurance	Low	Dry	\$-64,000
47	20%_Divestment	Buy_Insurance	Low	Wet	\$336,000
48	20%_Divestment	Buy_Insurance	Low	Soaking	\$736,000

Oil Wildcatter's Problem					
The Payoffs					
Obs	_STATE1	_STATE2	_STATE3	_STATE4	_VALUE_
49	20%_Divestment	Buy_Insurance	Fair	Dry	\$-184,000
50	20%_Divestment	Buy_Insurance	Fair	Wet	\$216,000
51	20%_Divestment	Buy_Insurance	Fair	Soaking	\$616,000
52	20%_Divestment	Buy_Insurance	High	Dry	\$-344,000
53	20%_Divestment	Buy_Insurance	High	Wet	\$56,000
54	20%_Divestment	Buy_Insurance	High	Soaking	\$456,000
55	30%_Divestment	Do_Not_Buy	Low	Dry	\$-105,000
56	30%_Divestment	Do_Not_Buy	Low	Wet	\$385,000
57	30%_Divestment	Do_Not_Buy	Low	Soaking	\$735,000
58	30%_Divestment	Do_Not_Buy	Fair	Dry	\$-210,000
59	30%_Divestment	Do_Not_Buy	Fair	Wet	\$280,000
60	30%_Divestment	Do_Not_Buy	Fair	Soaking	\$630,000
61	30%_Divestment	Do_Not_Buy	High	Dry	\$-350,000
62	30%_Divestment	Do_Not_Buy	High	Wet	\$140,000
63	30%_Divestment	Do_Not_Buy	High	Soaking	\$490,000
64	30%_Divestment	Buy_Insurance	Low	Dry	\$-56,000
65	30%_Divestment	Buy_Insurance	Low	Wet	\$294,000
66	30%_Divestment	Buy_Insurance	Low	Soaking	\$644,000
67	30%_Divestment	Buy_Insurance	Fair	Dry	\$-161,000
68	30%_Divestment	Buy_Insurance	Fair	Wet	\$189,000
69	30%_Divestment	Buy_Insurance	Fair	Soaking	\$539,000
70	30%_Divestment	Buy_Insurance	High	Dry	\$-301,000
71	30%_Divestment	Buy_Insurance	High	Wet	\$49,000
72	30%_Divestment	Buy_Insurance	High	Soaking	\$399,000
73	40%_Divestment	Do_Not_Buy	Low	Dry	\$-90,000
74	40%_Divestment	Do_Not_Buy	Low	Wet	\$330,000
75	40%_Divestment	Do_Not_Buy	Low	Soaking	\$630,000
76	40%_Divestment	Do_Not_Buy	Fair	Dry	\$-180,000
77	40%_Divestment	Do_Not_Buy	Fair	Wet	\$240,000
78	40%_Divestment	Do_Not_Buy	Fair	Soaking	\$540,000
79	40%_Divestment	Do_Not_Buy	High	Dry	\$-300,000
80	40%_Divestment	Do_Not_Buy	High	Wet	\$120,000
81	40%_Divestment	Do_Not_Buy	High	Soaking	\$420,000
82	40%_Divestment	Buy_Insurance	Low	Dry	\$-48,000
83	40%_Divestment	Buy_Insurance	Low	Wet	\$252,000
84	40%_Divestment	Buy_Insurance	Low	Soaking	\$552,000
85	40%_Divestment	Buy_Insurance	Fair	Dry	\$-138,000
86	40%_Divestment	Buy_Insurance	Fair	Wet	\$162,000
87	40%_Divestment	Buy_Insurance	Fair	Soaking	\$462,000
88	40%_Divestment	Buy_Insurance	High	Dry	\$-258,000
89	40%_Divestment	Buy_Insurance	High	Wet	\$42,000
90	40%_Divestment	Buy_Insurance	High	Soaking	\$342,000
91	50%_Divestment	Do_Not_Buy	Low	Dry	\$-75,000
92	50%_Divestment	Do_Not_Buy	Low	Wet	\$275,000
93	50%_Divestment	Do_Not_Buy	Low	Soaking	\$525,000
94	50%_Divestment	Do_Not_Buy	Fair	Dry	\$-150,000
95	50%_Divestment	Do_Not_Buy	Fair	Wet	\$200,000
96	50%_Divestment	Do_Not_Buy	Fair	Soaking	\$450,000

Oil Wildcatter's Problem

The Payoffs

Obs	_STATE1	_STATE2	_STATE3	_STATE4	_VALUE_
97	50%_Divestment	Do_Not_Buy	High	Dry	\$-250,000
98	50%_Divestment	Do_Not_Buy	High	Wet	\$100,000
99	50%_Divestment	Do_Not_Buy	High	Soaking	\$350,000
100	50%_Divestment	Buy_Insurance	Low	Dry	\$-40,000
101	50%_Divestment	Buy_Insurance	Low	Wet	\$210,000
102	50%_Divestment	Buy_Insurance	Low	Soaking	\$460,000
103	50%_Divestment	Buy_Insurance	Fair	Dry	\$-115,000
104	50%_Divestment	Buy_Insurance	Fair	Wet	\$135,000
105	50%_Divestment	Buy_Insurance	Fair	Soaking	\$385,000
106	50%_Divestment	Buy_Insurance	High	Dry	\$-215,000
107	50%_Divestment	Buy_Insurance	High	Wet	\$35,000
108	50%_Divestment	Buy_Insurance	High	Soaking	\$285,000
109	60%_Divestment	Do_Not_Buy	Low	Dry	\$-60,000
110	60%_Divestment	Do_Not_Buy	Low	Wet	\$220,000
111	60%_Divestment	Do_Not_Buy	Low	Soaking	\$420,000
112	60%_Divestment	Do_Not_Buy	Fair	Dry	\$-120,000
113	60%_Divestment	Do_Not_Buy	Fair	Wet	\$160,000
114	60%_Divestment	Do_Not_Buy	Fair	Soaking	\$360,000
115	60%_Divestment	Do_Not_Buy	High	Dry	\$-200,000
116	60%_Divestment	Do_Not_Buy	High	Wet	\$80,000
117	60%_Divestment	Do_Not_Buy	High	Soaking	\$280,000
118	60%_Divestment	Buy_Insurance	Low	Dry	\$-32,000
119	60%_Divestment	Buy_Insurance	Low	Wet	\$168,000
120	60%_Divestment	Buy_Insurance	Low	Soaking	\$368,000
121	60%_Divestment	Buy_Insurance	Fair	Dry	\$-92,000
122	60%_Divestment	Buy_Insurance	Fair	Wet	\$108,000
123	60%_Divestment	Buy_Insurance	Fair	Soaking	\$308,000
124	60%_Divestment	Buy_Insurance	High	Dry	\$-172,000
125	60%_Divestment	Buy_Insurance	High	Wet	\$28,000
126	60%_Divestment	Buy_Insurance	High	Soaking	\$228,000
127	70%_Divestment	Do_Not_Buy	Low	Dry	\$-45,000
128	70%_Divestment	Do_Not_Buy	Low	Wet	\$165,000
129	70%_Divestment	Do_Not_Buy	Low	Soaking	\$315,000
130	70%_Divestment	Do_Not_Buy	Fair	Dry	\$-90,000
131	70%_Divestment	Do_Not_Buy	Fair	Wet	\$120,000
132	70%_Divestment	Do_Not_Buy	Fair	Soaking	\$270,000
133	70%_Divestment	Do_Not_Buy	High	Dry	\$-150,000
134	70%_Divestment	Do_Not_Buy	High	Wet	\$60,000
135	70%_Divestment	Do_Not_Buy	High	Soaking	\$210,000
136	70%_Divestment	Buy_Insurance	Low	Dry	\$-24,000
137	70%_Divestment	Buy_Insurance	Low	Wet	\$126,000
138	70%_Divestment	Buy_Insurance	Low	Soaking	\$276,000
139	70%_Divestment	Buy_Insurance	Fair	Dry	\$-69,000
140	70%_Divestment	Buy_Insurance	Fair	Wet	\$81,000
141	70%_Divestment	Buy_Insurance	Fair	Soaking	\$231,000
142	70%_Divestment	Buy_Insurance	High	Dry	\$-129,000
143	70%_Divestment	Buy_Insurance	High	Wet	\$21,000
144	70%_Divestment	Buy_Insurance	High	Soaking	\$171,000

Oil Wildcatter's Problem					
The Payoffs					
Obs	_STATE1	_STATE2	_STATE3	_STATE4	_VALUE_
145	80%_Divestment	Do_Not_Buy	Low	Dry	\$-30,000
146	80%_Divestment	Do_Not_Buy	Low	Wet	\$110,000
147	80%_Divestment	Do_Not_Buy	Low	Soaking	\$210,000
148	80%_Divestment	Do_Not_Buy	Fair	Dry	\$-60,000
149	80%_Divestment	Do_Not_Buy	Fair	Wet	\$80,000
150	80%_Divestment	Do_Not_Buy	Fair	Soaking	\$180,000
151	80%_Divestment	Do_Not_Buy	High	Dry	\$-100,000
152	80%_Divestment	Do_Not_Buy	High	Wet	\$40,000
153	80%_Divestment	Do_Not_Buy	High	Soaking	\$140,000
154	80%_Divestment	Buy_Insurance	Low	Dry	\$-16,000
155	80%_Divestment	Buy_Insurance	Low	Wet	\$84,000
156	80%_Divestment	Buy_Insurance	Low	Soaking	\$184,000
157	80%_Divestment	Buy_Insurance	Fair	Dry	\$-46,000
158	80%_Divestment	Buy_Insurance	Fair	Wet	\$54,000
159	80%_Divestment	Buy_Insurance	Fair	Soaking	\$154,000
160	80%_Divestment	Buy_Insurance	High	Dry	\$-86,000
161	80%_Divestment	Buy_Insurance	High	Wet	\$14,000
162	80%_Divestment	Buy_Insurance	High	Soaking	\$114,000
163	90%_Divestment	Do_Not_Buy	Low	Dry	\$-15,000
164	90%_Divestment	Do_Not_Buy	Low	Wet	\$55,000
165	90%_Divestment	Do_Not_Buy	Low	Soaking	\$105,000
166	90%_Divestment	Do_Not_Buy	Fair	Dry	\$-30,000
167	90%_Divestment	Do_Not_Buy	Fair	Wet	\$40,000
168	90%_Divestment	Do_Not_Buy	Fair	Soaking	\$90,000
169	90%_Divestment	Do_Not_Buy	High	Dry	\$-50,000
170	90%_Divestment	Do_Not_Buy	High	Wet	\$20,000
171	90%_Divestment	Do_Not_Buy	High	Soaking	\$70,000
172	90%_Divestment	Buy_Insurance	Low	Dry	\$-8,000
173	90%_Divestment	Buy_Insurance	Low	Wet	\$42,000
174	90%_Divestment	Buy_Insurance	Low	Soaking	\$92,000
175	90%_Divestment	Buy_Insurance	Fair	Dry	\$-23,000
176	90%_Divestment	Buy_Insurance	Fair	Wet	\$27,000
177	90%_Divestment	Buy_Insurance	Fair	Soaking	\$77,000
178	90%_Divestment	Buy_Insurance	High	Dry	\$-43,000
179	90%_Divestment	Buy_Insurance	High	Wet	\$7,000
180	90%_Divestment	Buy_Insurance	High	Soaking	\$57,000
181	100%_Divestment				\$0

The optimal decisions for this problem can be identified by invoking PROC DTREE and using the SUMMARY statement as follows:

```

title "Oil Wildcatter's Problem";

proc dtree stagein=Dtoils4
    probin=Dtoilp4
    payoffs=Dtoilu4
    criterion=maxce rt=1200000
    nowarning;
    evaluate;
    summary / target=Divestment;
    summary / target=Insurance;
quit;

```

The optimal decision summaries in [Output 5.2.2](#) and [Output 5.2.3](#) show the optimal strategy for the wildcatter.

- The wildcatter should sell 30% of his investment to other companies and reject the insurance policy offered to him.
- The insurance policy should be accepted only if the decision to not divest is made.
- If the decision to buy the insurance policy is made, then it is optimal to divest 10% of the venture.

Output 5.2.2. Summary of the Oil Wildcatter's Problem for DIVESTMENT

Oil Wildcatter's Problem		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	
Divestment	Decision	
Insurance	Decision	
Cost	Chance	
Oil_Deposit	Chance	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Certain Equivalent Value (MAXCE)	
Risk Tolerance:	\$1,200,000	
Optimal Decision Yields:	\$50,104	
Optimal Decision Policy		
Up to Stage Divestment		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value
No_Divestment		\$45,728
10%_Divestment		\$48,021
20%_Divestment		\$49,907
30%_Divestment		\$50,104*
40%_Divestment		\$48,558
50%_Divestment		\$45,219
60%_Divestment		\$40,036
70%_Divestment		\$32,965
80%_Divestment		\$23,961
90%_Divestment		\$12,985
100%_Divestment		\$0

Output 5.2.3. Summary of the Oil Wildcatter's Problem for INSURANCE

```

Oil Wildcatter's Problem

The DTREE Procedure
Optimal Decision Summary

Order of Stages

Stage          Type
-----
Divestment     Decision
Insurance      Decision
Cost           Chance
Oil_Deposit    Chance
_ENDST_       End

Decision Parameters

Decision Criterion:  Maximize Certain Equivalent Value (MAXCE)
Risk Tolerance:     $1,200,000
Optimal Decision Yields:  $50,104

Optimal Decision Policy

Up to Stage Insurance

Alternatives or Outcomes          Cumulative      Evaluating
                                   Reward           Value
-----
No_Divestment   Buy_Insurance      $45,728*
No_Divestment   Do_Not_Buy         $44,499
10%_Divestment  Buy_Insurance      $46,552
10%_Divestment  Do_Not_Buy         $48,021*
20%_Divestment  Buy_Insurance      $46,257
20%_Divestment  Do_Not_Buy         $49,907*
30%_Divestment  Buy_Insurance      $44,812
30%_Divestment  Do_Not_Buy         $50,104*
40%_Divestment  Buy_Insurance      $42,186
40%_Divestment  Do_Not_Buy         $48,558*
50%_Divestment  Buy_Insurance      $38,350
50%_Divestment  Do_Not_Buy         $45,219*
60%_Divestment  Buy_Insurance      $33,273
60%_Divestment  Do_Not_Buy         $40,036*
70%_Divestment  Buy_Insurance      $26,927
70%_Divestment  Do_Not_Buy         $32,965*
80%_Divestment  Buy_Insurance      $19,284
80%_Divestment  Do_Not_Buy         $23,961*
90%_Divestment  Buy_Insurance      $10,317
90%_Divestment  Do_Not_Buy         $12,985*
    
```

This information can be illustrated graphically using the GPLOT procedure. [Output 5.2.4](#) on page 413, produced by the PROC GPLOT statements shown in the following code, provides a clear picture of the effects of the divestment possibilities and the insurance options.

```

/* create a data set for the return corresponds to each */
/* divestment possibilities and the insurance options */
data Data2g;
input INSURE DIVEST VALUE;
datalines;
    
```

```

      1      0      45728
      0      0      44499
      1     10     46552
      0     10     48021
      1     20     46257
      0     20     49907
      1     30     44812
      0     30     50104
      1     40     42186
      0     40     48558
      1     50     38350
      0     50     45219
      1     60     33273
      0     60     40036
      1     70     26927
      0     70     32965
      1     80     19284
      0     80     23961
      1     90     10317
      0     90     12985
      1    100         0
      0    100         0
;

      /* -- define a format for INSURE variable          -- */
proc format;
  value sample 0='Do_Not_Buy' 1='Buy_Insurance';
run;

      /* -- define title                                -- */
title h=3 "Oil Wildcatter's Problem";

      /* -- set graphics options                        -- */
goptions lfactor=3;

      /* define legend                                  -- */
legend1 frame cframe=white label=none
        cborder=black position=center ;

      /* define symbol characteristics of the data points */
      /* and the interpolation line for returns vs divestment */
      /* when INSURE=0 */
symbol1 c=black i=join v=dot l=1 h=1.5;

      /* define symbol characteristics of the data points */
      /* and the interpolation line for returns vs divestment */
      /* when INSURE=1 */
symbol2 c=black i=join v=square l=2 h=1.5;

      /* -- define axis characteristics                -- */
axis1 minor=none label=('Divestment (in percentage)');
axis2 minor=none label=(angle=90 rotate=0 'Certainty Equivalent');

      /* plot VALUE vs DIVEST using INSURE as third variable */

```

```

proc gplot data=Data2g ;
  plot VALUE*DIVEST=INSURE / haxis=axis1
                             vaxis=axis2
                             legend=legend1
                             name="dt2"
                             frame
                             cframe=white ;

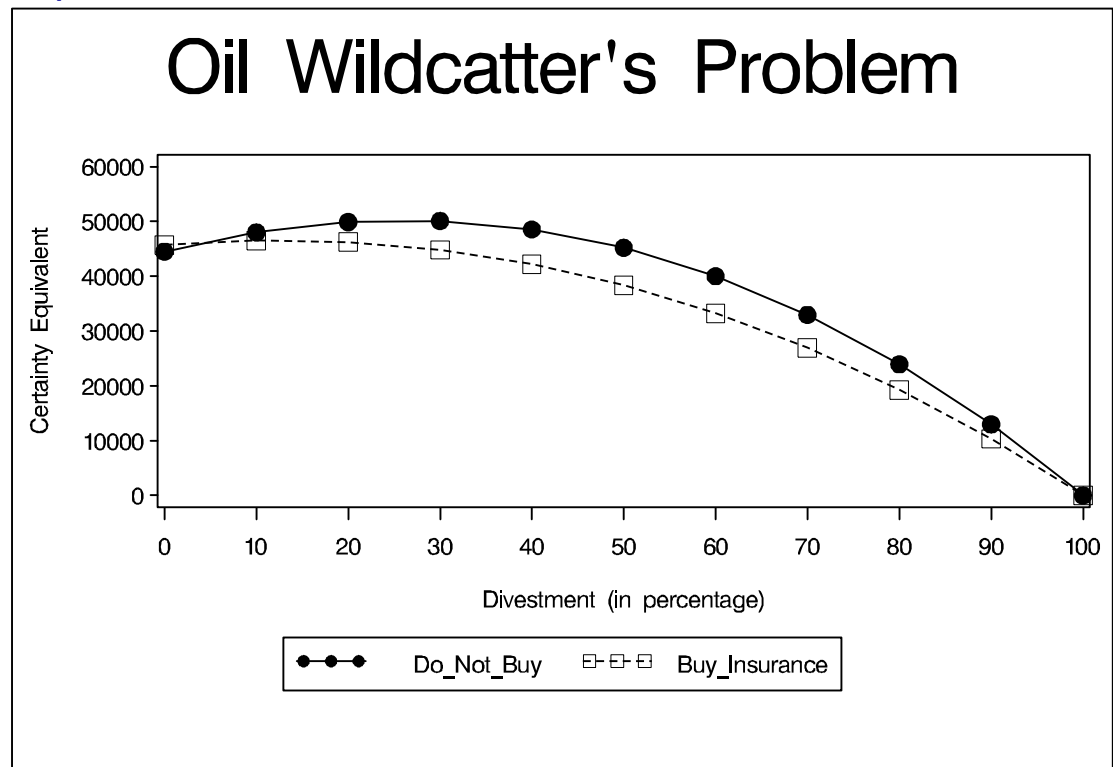
  format INSURE SAMPLE.;
run;

quit;

```

Note that the data input into the Data2g data set is obtained from the optimal decision summary as in [Output 5.2.3](#) on page 411. The value 1 of the INSURE variable represents the alternative 'Buy_Insurance' and the value 0 represents the alternative 'Do_Not_Buy'.

Output 5.2.4. Returns of the Oil Wildcatter's Problem



Example 5.3. Contract Bidding Problem

This example illustrates the use of several of the graphics options for producing graphics quality decision tree diagrams.

The production manager of a manufacturing company is planning to bid on a project to manufacture a new type of machine. He has the choice of bidding low or high. The evaluation of the bid will more likely be favorable if the bidder has built a prototype of the machine and includes it with the bid. However, he is uncertain about the cost of

building the prototype. His technical staff has provided him a probability distribution on the cost of the prototype.

Table 5.33. Probability on the Cost of Building Prototype

Outcome	Cost	Probability
Expensive	\$4,500	0.4
Moderate	\$2,500	0.5
Inexpensive	\$1,000	0.1

There is also uncertainty in whether he will win the contract or not. He has estimated the probability distribution of winning the contract as shown in Table 5.34.

Table 5.34. Probability of Winning the Contract

Givens		Events	
		Win the Contract	Lose the Contract
Build Prototype	High Bid	0.4	0.6
Build Prototype	Low Bid	0.8	0.2
No Prototype	High Bid	0.2	0.8
No Prototype	Low Bid	0.7	0.3

In addition, the payoffs of this bidding venture are affected by the cost of building the prototype. Table 5.35 shows his payoffs. The first row of the table shows the payoff is 0 if he loses the contract, regardless of whether or not he builds the prototype and whether he bids low or high. The remainder of the entries in the table give the payoff under the various scenarios.

Table 5.35. The Payoffs of the Contract Bidding Decision

States		Actions	
Result	Cost	Bid low	Bid high
Lose the Contract		0	0
Win the Contract		\$35,000	\$75,000
Win the Contract	Expensive	\$25,000	\$65,000
Win the Contract	Moderate	\$35,000	\$75,000
Win the Contract	Inexpensive	\$45,000	\$85,000

The production manager must decide whether to build the prototype and how to bid. He uses PROC DTREE to help him to make these decisions. The structure of the model is stored in the STAGEIN= data set named Stage3. There are two decision stages, 'Choose' and 'Bid', and two chance stages, 'Cost_Prototype' and 'Contract'. The 'Choose' stage represents the decision whether or not to build a prototype. The chance stage 'Cost_Prototype' represents the uncertain cost for building a prototype. It can be 'Expensive', which costs \$4,500, or 'Moderate', which costs \$2,500, or 'Inexpensive', which costs \$1,000. The 'Bid' stage represents the decision whether to bid high or bid low. The last stage, 'Contract', represents the result, either win the contract or lose the contract.

```

/* -- create the STAGEIN= data set                                -- */
data Stage3;

```

```

format _STNAME_ $14. _STTYPE_ $2. _OUTCOM_ $15.
      _SUCCES_ $14. _REWARD_ dollar8.0 ;
input  _STNAME_ $ _STTYPE_ $ _OUTCOM_ $
      _SUCCES_ $ _REWARD_ dollar8.0;
datalines;
Choose      D   Build_Prototype Cost_Prototype      .
            .   No_Prototype   Bid              .
Cost_Prototype C   Expensive     Bid              -$4,500
            .   Moderate       Bid              -$2,500
            .   Inexpensive    Bid              -$1,000
Bid          D   High_Bid       Contract         .
            .   Low_Bid        Contract         .
Contract     C   Win_Contract   .                .
            .   Lose_Contract  .                .
;

```

The `PROBIN=` data set, named `Prob3`, contains the probability information as in [Table 5.33](#) (page 414) and [Table 5.34](#) (page 414).

```

/* -- create the PROBIN= data set          -- */
data Prob3;
  format _GIVEN1_ $15. _EVENT_ $14. ;
  input (_GIVEN1_ _GIVEN2_ _EVENT_) ($) _PROB_;
  datalines;
            .           .           Expensive      0.4
            .           .           Moderate      0.5
            .           .           Inexpensive   0.1
Build_Prototype High_Bid   Win_Contract   0.4
Build_Prototype High_Bid   Lose_Contract  0.6
Build_Prototype Low_Bid    Win_Contract   0.8
Build_Prototype Low_Bid    Lose_Contract  0.2
No_Prototype     High_Bid   Win_Contract   0.2
No_Prototype     High_Bid   Lose_Contract  0.8
No_Prototype     Low_Bid    Win_Contract   0.7
No_Prototype     Low_Bid    Lose_Contract  0.3
;

```

The `PAYOFFS=` data set named `Payoff3` contains the payoff information as in [Table 5.35](#) on page 414. Notice that the payoff to outcome '`Lose_Contract`' is not in the data set `Payoff3`. Since `PROC DTREE` assigns the default value 0 to all scenarios that are not in the `PAYOFFS=` data set, it is not necessary to include it.

```

/* -- create the PAYOFFS= data set        -- */
data Payoff3;
  format _STATE1_ _STATE2_ $12.;
  input (_STATE1_ _STATE2_ _ACTION_) ($)
        _VALUE_ dollar8.0;
  datalines;
Win_Contract .           Low_Bid      $35,000
Win_Contract .           High_Bid     $75,000
Win_Contract Expensive   Low_Bid     $25,000

```

```

Win_Contract    Expensive    High_Bid        $65,000
Win_Contract    Moderate    Low_Bid         $35,000
Win_Contract    Moderate    High_Bid        $75,000
Win_Contract    Inexpensive Low_Bid         $45,000
Win_Contract    Inexpensive High_Bid        $85,000
;

```

The solution, as in [Output 5.3.1](#) on page 417, is displayed on a graphics device with the following code. Notice that the title is specified before invoking PROC DTREE. The **GRAPHICS** option is given on the **PROC DTREE** statement. Specifying the **COMPRESS** option in the **TREEPLOT** statement causes the decision tree diagram to be drawn completely on one page. The vertical distance between two successive end nodes is 1 character cell (**ybetween=1 cell**). All text, except that in the first title line is drawn with font SWISS and height 1 character cell. The height for all nodes is 3 character cells, which is specified by the **HSYMBOL=** option. The thickness for all links in the diagram, except those that represent optimal decisions, is specified by the **LWIDTH=** option as 20. The thickness of the links that represent optimal decisions is specified as 25 (**lwidthb=25**), and the type of those links is 3 (**lstyleb=3**), the dash line. Colors for the text, links and nodes, and symbols to be used for nodes are not specified and hence defaults are used.

```

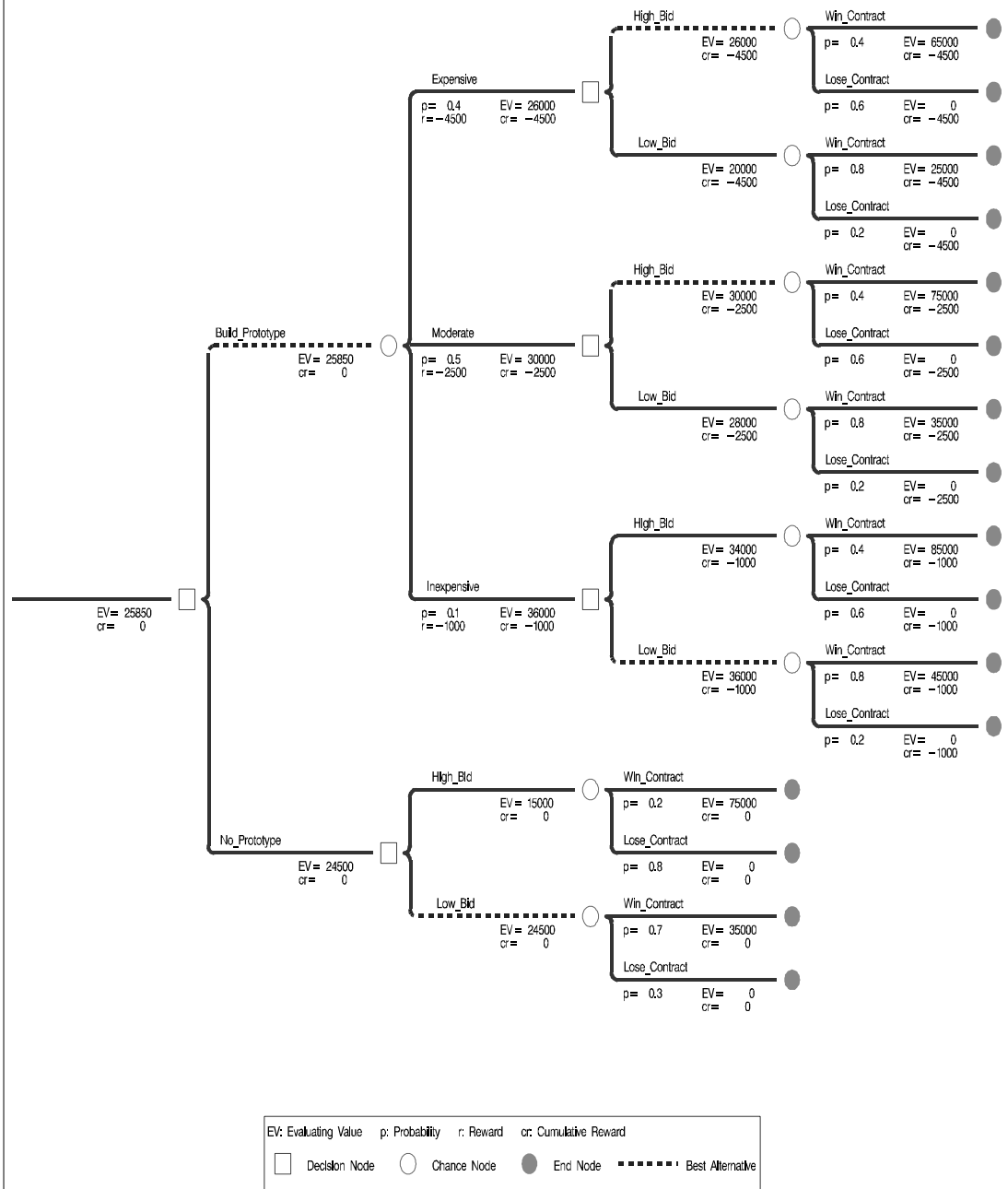
/* -- define title -- */
title1 font=swissb h=2 "Contract Bidding Example" ;

/* -- PROC DTREE statements -- */
proc dtree stagein=Stage3 probin=Prob3 payoffs=Payoff3
  graphics
  nowarning
  ;
  evaluate;
  treeplot / name="dt3" compress ybetween=1 cell
            ftext=swiss htext=1 hsymbol=3
            lstyleb=3 lwidth=20 lwidthb=25;
quit;

```

Output 5.3.1. Decision Tree for the Contract Bidding Problem

Contract Bidding Example



With the information on this decision tree, the production manager can select the optimal bidding strategy:

- He should build a prototype to accompany the bid and always bid high unless the cost for building the prototype is as low as \$1,000. This optimal strategy yields an expected return of \$25,850.
- If no prototype is built, the preferred decision is to make a low bid. In this case the expected return is \$24,500.

Example 5.4. Research and Development Decision Problem

This example illustrates the use of the SYMBOL and GOPTIONS statements for controlling the appearance of the decision tree diagram. It also uses the ANNOTATE= option to add a customized legend to the diagram.

A typical problem encountered in a research and development setting involves two decisions: whether or not to conduct research, and whether or not to commercialize the results of that research. Suppose that research and development for a specific project will cost \$350,000, and there is a 0.4 probability that it will fail. Also suppose that the different levels of market success and their corresponding probabilities are:

Table 5.36. Levels of Market Success and Their Probabilities

Market Success	Net Return	Probability
Great	\$1,000,000	0.25
Good	\$500,000	0.35
Fair	\$200,000	0.30
Poor	-\$250,000	0.10

The structure of the model is represented in the STAGEIN= data set Stage4.

```

/* -- create the STAGEIN= data set          -- */
data Stage4;
  format _STNAME_ $10. _STTYPE_ $2. _OUTCOM_ $12.
         _REWARD_ dollar12.0 _SUCC_ $10.;
  input  _STNAME_ $ _STTYPE_ $ _OUTCOM_ $
         _REWARD_ dollar12.0 _SUCC_ $ ;
  datalines;
R_and_D      D   Not_Conduct  .           .
.            .   Conduct      -$350,000  RD_Outcome
RD_Outcome   C   Success       .           Production
.            .   Failure       .           .
Production   D   Produce       .           Sales
.            .   Abandon       .           .
Sales        C   Great         .           .
.            .   Good          .           .
.            .   Fair          .           .
.            .   Poor          .           .
;

```

The probability distributions for the various outcomes of the chance stages are given in the PROBIN= data set named Prob4.


```

/* -- create the PROBIN= data set          -- */
data Prob4;
  input _EVENT1_ $ _PROB1_ _EVENT2_ $ _PROB2_;
  datalines;
Success      0.6      Failure    0.4
Great        0.25     Good       0.35
Fair         0.30     poor      0.1
;

```

The payoffs are given in the `PAYOFFS=` data set `Payoff4`.

```

/* -- create the PAYOFFS= data set        -- */
data Payoff4;
  input _STATE_ $ _VALUE_ dollar12.0;
  datalines;
Great        $1,000,000
Good         $500,000
Fair         $200,000
Poor         -$250,000
;

```

The following `DATA` step builds a data set that contains the Annotate description of a legend. Refer to the chapter on the annotate facility in *SAS/GRAPH Software: Reference* for a description of the Annotate facility.

```

/* -- create the ANNOTATE= data set for legend  -- */
data Legends;
  length FUNCTION STYLE $ 8;
  WHEN = 'B'; POSITION='0';
  XSYS='4'; YSYS='4';
  input FUNCTION $ X Y STYLE $ SIZE COLOR $ TEXT $ & 16.;
  datalines;
move      8  2.1  .      .      .
draw     12  2.1  .      8  black .
label    14  2    swiss  0.7 black BEST ACTION
symbol   9  3.5  marker 0.7 black A
label    14  3.2  swiss  0.7 black END NODE
symbol   9  4.7  marker 0.7 black P
label    14  4.4  swiss  0.7 black CHANCE NODE
symbol   9  5.9  marker 0.7 black U
label    14  5.6  swiss  0.7 black DECISION NODE
label    8  7.0  swiss  0.7 black LEGEND:
move     5  8.5  .      .      black .
draw    27  8.5  .      2  black .
draw    27  1    .      2  black .
draw     5  1    .      2  black .
draw     5  8.5  .      2  black .
;

```

The following program invokes `PROC DTREE`, which evaluates the decision tree and plots it on a graphics device using the Annotate data set `Legends` to draw the legend.

```

        /* define symbol characteristics for chance nodes and */
        /* links except those that represent optimal decisions */
symbol1 f=marker h=2 v=P c=black w=5 l=1;

        /* define symbol characteristics for decision nodes */
        /* and links that represent optimal decisions */
symbol2 f=marker h=2 v=U c=black w=10 l=1;

        /* define symbol characteristics for end nodes */
symbol3 f=marker h=2 v=A c=black;

        /* -- define title -- */
title f=swissb h=2 'Research and Development Decision';

        /* -- PROC DTREE statements -- */
proc dtree stagein=Stage4 probin=Prob4 payoffs=Payoff4
          criterion=maxce rt=1800000
          graphics annotate=Legends nolegend;

evaluate;

treeplot / linka=1 linkb=2 symbold=2 symbolc=1 symbole=3
          compress name="dt4";

quit;

```

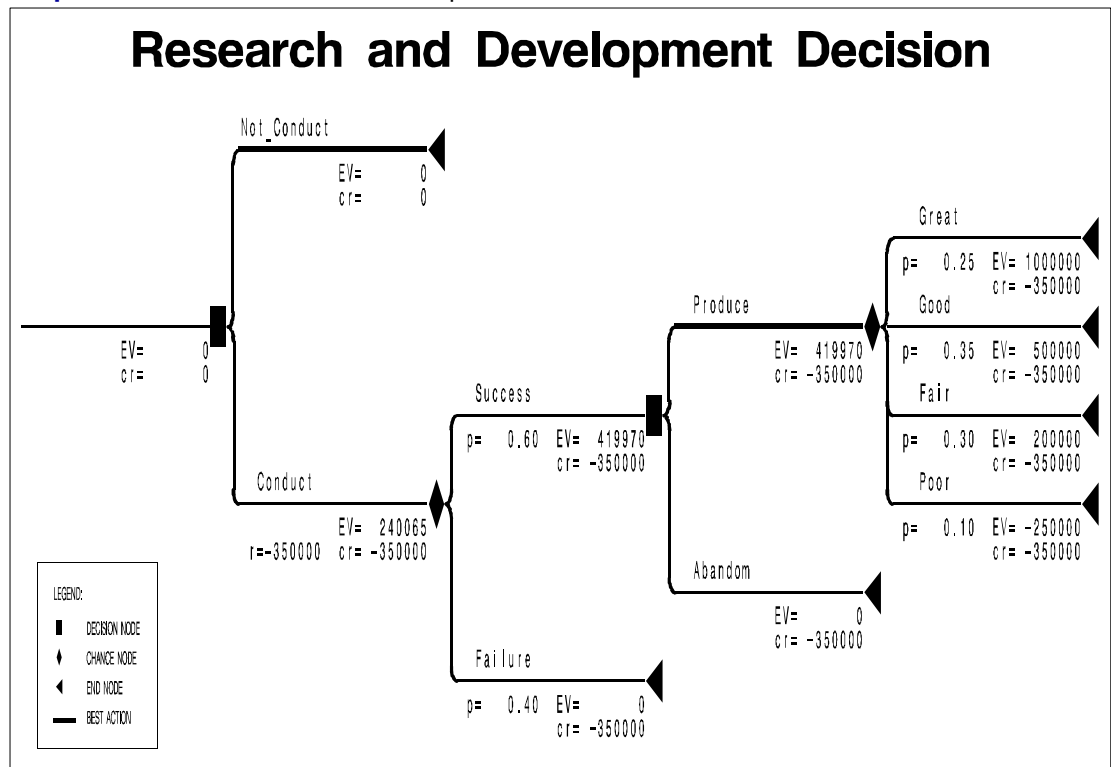
The SYMBOL1, SYMBOL2, and SYMBOL3 statements create three SYMBOL definitions that contain information for drawing nodes and links. The Legends data set and the ANNOTATE= option specified in the PROC DTREE statement cause the procedure to produce a customized legend for the decision tree diagram. The LINKA=, LINKB=, SYMBOLD=, SYMBOLC=, and SYMBOLE= specifications in the TREEPLOT statement tell PROC DTREE how to use SYMBOL definitions to draw decision tree. Table 5.37 on page 421 describes the options in SYMBOL definitions used to draw the decision tree diagram.

The decision tree diagram produced by the TREEPLOT statement is shown in Output 5.4.1 (page 421). As illustrated on the decision tree, the program recommends that one should not conduct the research and development of the product if he or she is risk averse with a risk tolerance of \$1,800,000. However, if he or she decides to undertake the research and development and it is a success, then he or she should commercialize the product.

Table 5.37. The Usage of SYMBOL Definitions

SYMBOL Definition	Specification	Description	Used to Draw
The First	C=black L=1 W=5	Color Line Type Thickness	All links except those that indicate optimal decisions
	C=black F=marker H=2 V=P	Color Font Height Symbol	Chance nodes
The Second	C=black L=1 W=10	Color Line Type Thickness	All links that indicate optimal decisions
	C=black F=marker H=2 V=U	Color Font Height Symbol	Decision nodes
The Third	C=black F=marker H=2 V=A	Color Font Height Symbol	End nodes

Output 5.4.1. Research and Development Decision Tree



Example 5.5. Loan Grant Decision Problem

Many financial decisions are difficult to analyze because of the variety of available strategies and the continuous nature of the problem. However, if the alternatives and time frame can be restricted, then decision analysis can be a useful analysis tool.

For example, a loan officer is faced with the problem of deciding whether to *approve* or *deny* an application for a one-year \$30,000 loan at the current rate of 15% of interest. If the application is approved, the borrower will either *pay off* the loan in full after one year or *default*. Based on experience, the default rate is about 36 out of 700. If the loan is denied, the money is put in government bonds at the interest rate of 8%.

To obtain more information about the applicant, the loan officer engages a credit investigation unit at a cost of \$500 per person that will give either a *positive* recommendation for making a loan or a *negative* recommendation. Past experience with this investigator yields that of those who ultimately paid off their loans, 570 out of 664 were given a positive recommendation. On the other hand, 6 out of 26 that had defaulted had also been given a positive recommendation by the investigator.

The `STAGEIN=` data set, `Stage6`, gives the structure of the decision problem.

```

/* -- create the STAGEIN= data set          -- */
data Stage6;
  format _STNAME_ $14. _STTYPE_ $2. _OUTCOM_ $20. _SUCC_ $14. ;
  input _STNAME_ $ _STTYPE_ $ _OUTCOM_ & _SUCC_ $ ;
  datalines;
Application      D   Approve loan           Payment
.                .   Deny loan             .
Payment          C   Pay off                .
.                .   Default                .
Investigation    D   Order investigation    Recommendation
.                .   Do not order          Application
Recommendation  C   Positive                Application
.                .   Negative                Application
;

```

The `PROBIN=` data set `Prob6` gives the probability distributions for the random events at the chance nodes.

```

/* -- create the PROBIN= data set          -- */
data Prob6;
  length _GIVEN_ _EVENT1_ _EVENT2_ $16;

  _EVENT1_='Pay off';   _EVENT2_='Default';
  _PROB1_=664/700;     _PROB2_=1.0-_PROB1_;
  output;

  _GIVEN_='Pay off';
  _EVENT1_='Positive'; _EVENT2_='Negative';
  _PROB1_=570/664;     _PROB2_=1.0-_PROB1_;
  output;

```

```

_GIVEN_='Default';
_EVENT1_='Positive';   _EVENT2_='Negative';
_PROB1_=6/26;          _PROB2_=1.0-_PROB1_;
output;

```

```
run;
```

The `PAYOFFS=` data set `Payoff6` gives the payoffs for the various scenarios. Notice that the first observation in this data set indicates that if the officer denies the loan application, then payoffs are the interest from the money invested in government bonds. The second and the third observations are redundant for the basic analysis but are needed to determine the value of information as shown later.

```

/* -- create the PAYOFFS= data set          -- */
data Payoff6(drop=loan);
  length _STATE_ _ACT_ $24;

  loan=30000;

  _ACT_='Deny loan';   _VALUE_=loan*0.08;   output;
  _STATE_='Pay off';   _VALUE_=loan*0.08;   output;
  _STATE_='Default';   _VALUE_=loan*0.08;   output;

  _ACT_='Approve loan';
  _STATE_='Pay off';   _VALUE_=loan*0.15;   output;
  _STATE_='Default';   _VALUE_=-1.0*loan;   output;

run;

```

The following code invokes the DTREE procedure to solve this decision problem.

```

/* -- define title          -- */
title 'Loan Grant Decision';

/* -- PROC DTREE statements -- */
proc dtree
  stagein=Stage6 probin=Prob6 payoffs=Payoff6
  summary target=investigation nowarning;

  modify 'Order investigation' reward -500;

  evaluate;

  OPTIONS LINESIZE=85;
  summary / target=Application;
  OPTIONS LINESIZE=80;

```

Note that the \$500 investigation fee is not included in the `Stage6` data set. Since the outcome '`Order investigation`' is the only outcome that has a nonzero

reward, it is easier to set the reward for this outcome using the **MODIFY** statement. The quotes that enclose the outcome name in the **MODIFY** statement are necessary because the outcome name contains a space.

The results in [Output 5.5.1](#) and [Output 5.5.2](#) indicate that it is optimal to do the following:

- The loan officer should order the credit investigation and approve the loan application if the investigator gives the applicant a positive recommendation. On the other hand, he should deny the application if a negative recommendation is given to the applicant.
- Furthermore, the loan officer should order a credit investigation if the cost for the investigation is less than $\$3,725 - \$2,726 = \$999$.

Output 5.5.1. Summary of the Loan Grant Decision for Investigation

Loan Grant Decision		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	
Investigation	Decision	
Recommendation	Chance	
Application	Decision	
Payment	Chance	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Expected Value (MAXEV)	
Optimal Decision Yields:	3225	
Optimal Decision Policy		
Up to Stage Investigation		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value
Order investigation	-500	3725*
Do not order	0	2726

Output 5.5.2. Summary of the Loan Grant Decision for Application

```

Loan Grant Decision

The DTREE Procedure
Optimal Decision Summary

Order of Stages

Stage          Type
-----
Investigation  Decision
Recommendation Chance
Application    Decision
Payment        Chance
_ENDST_       End

Decision Parameters

Decision Criterion:  Maximize Expected Value (MAXEV)
Optimal Decision Yields:  3225

Optimal Decision Policy

Up to Stage Application

Alternatives or Outcomes          Cumulative Reward  Evaluating Value
-----
Order investigation Positive      Approve loan        -500             4004*
Order investigation Positive      Deny loan           -500             2400
Order investigation Negative      Approve loan        -500             -3351
Order investigation Negative      Deny loan           -500             2400*
Do not order                       Approve loan         0                2726*
Do not order                       Deny loan            0                2400
    
```

Now, the loan officer learns of another credit investigation company that claims to have a more accurate credit checking system for predicting whether the applicants will default on their loans. However, he has not been able to find out what the company charges for their service or how accurate their credit checking system is. Perhaps the best thing he can do at this stage is to assume that the company can predict perfectly whether or not applicants will default on their loans and determine the maximum amount to pay for this perfect investigation. The answer to this question can be found with the `PROC DTREE` statements:

```

save;
move payment before investigation;
evaluate;
recall;
    
```

Notice that moving the stage `'Payment'` to the beginning of the tree means that the new decision tree contains two scenarios that are not in the original tree: the scenario `'Pay off'` and `'Deny loan'`, and the scenario `'Default'` and `'Deny loan'`. The second and third observations in the `Payoff6` data set supply values for these new scenarios. If these records are not included in the `PAYOFFS=` data set, then `PROC DTREE` assumes they are 0.

Also notice that the `SUMMARY` and `TARGET=` options are specified globally in the `PROC DTREE` statement and hence are not needed in the `EVALUATE` statement. The results from the `DTREE` procedure are displayed in [Output 5.5.3](#).

Output 5.5.3. Summary of the Loan Grant Decision with Perfect Information

Loan Grant Decision			
The DTREE Procedure			
Optimal Decision Summary			
Order of Stages			
Stage	Type		
Payment	Chance		
Investigation	Decision		
Recommendation	Chance		
Application	Decision		
ENDST	End		
Decision Parameters			
Decision Criterion:	Maximize Expected Value (MAXEV)		
Optimal Decision Yields:	4392		
Optimal Decision Policy			
Up to Stage Investigation			
Alternatives or Outcomes		Cumulative Reward	Evaluating Value
Pay off	Order investigation	-500	4500
Pay off	Do not order	0	4500*
Default	Order investigation	-500	2400
Default	Do not order	0	2400*

The optimal decision summary in [Output 5.5.3](#) shows that the yields with perfect investigation is \$4,392. Recall that the yield of alternative '**Do not order**' the investigation, as shown in [Output 5.5.1](#) on page 424, is \$2,726. Therefore, the maximum amount he should pay for the perfect investigation can be determined easily as

$$\begin{aligned}
 \text{VPI} &= \text{Value with Perfect Investigation} - \text{Value without Investigation} \\
 &= \$4,392 - \$2,726 \\
 &= \$1,666
 \end{aligned}$$

Note that if you use the **VPI** statement to determine the value of a perfect investigation, the result is different from the value calculated previously.

vpi payment;

NOTE: The currently optimal decision yields 3225.4725275.

NOTE: The new optimal decision yields 4392.

NOTE: The value of perfect information of stage Payment yields 1166.5274725.

The reason for this difference is that the **VPI** statement causes PROC DTREE first to determine the value with perfect information, then to compare this value with the value with current information available (in this example, it is the recommendation from the original investigation unit). Therefore, the **VPI** statement returns a value that is calculated as

$$\begin{aligned}
 \text{VPI} &= \text{Value with Perfect Information} - \text{Value with Current Information} \\
 &= \$4,392 - \$3,225 \\
 &= \$1,167
 \end{aligned}$$

The loan officer considered another question regarding the maximum amount he should pay to a company to help collect the principal and the interest if an applicant defaults on the loan. This question is similar to the question concerning the improvement that can be expected if he can control whether or not an applicant will default on his loan (of course he will always want the applicant to pay off in full after one year). The answer to this question can be obtained with the following statements:

```

modify payment type;
evaluate;

```

Output 5.5.4. Summary of the Loan Grant Decision with Perfect Control

Loan Grant Decision		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	
Investigation	Decision	
Recommendation	Chance	
Application	Decision	
Payment	Decision	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Expected Value (MAXEV)	
Optimal Decision Yields:	4500	
Optimal Decision Policy		
Up to Stage Investigation		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value
Order investigation	-500	4500
Do not order	0	4500*

The result is obvious and is shown in [Output 5.5.4](#). Using a calculation similar to the one used to calculate the value of a perfect investigation, the maximum amount one should pay for this kind of service is $\$4,500 - \$2,726 = \$1,774$. As previously described, this value is different from the value obtained by using the VPC statement. In fact, if you specify the statement

```
vpc payment;
```

you get the value of VPC, which is \$1,274.53, from the SAS log as

```
NOTE: The currently optimal decision yields 3225.4725275.
NOTE: The new optimal decision yields 4500.
NOTE: The value of perfect control of stage Payment yields
      1274.5274725.
```

Obviously, all of the values of investigation and other services depend on the value of the loan. Since each of the payoffs for the various scenarios given in the `Payoff6` data set is proportional to the value of loan, you can safely assume that the value of the loan is 1 unit and determine the ratio of the value for a particular service to the value of the loan. To obtain these ratios, change the value of the variable `LOAN` to 1 in the `Payoff6` data set and invoke PROC DTREE again as follows:

```
/* -- create the alternative PAYOFFS= data set -- */
data Payoff6a(drop=loan);
  length _STATE_ _ACT_ $24;
  loan=1;

  _ACT_='Deny loan';   _VALUE_=loan*0.08;   output;
  _STATE_='Pay off';   _VALUE_=loan*0.08;   output;
  _STATE_='Default';   _VALUE_=loan*0.08;   output;

  _ACT_='Approve loan';
  _STATE_='Pay off';   _VALUE_=loan*0.15;   output;
  _STATE_='Default';   _VALUE_=-1.0*loan;   output;
run;

/* -- PROC DTREE statements -- */
title 'Loan Grant Decision';

proc dtree
  stagein=Stage6 probin=Prob6 payoffs=Payoff6a
  nowarning;

  evaluate / summary target=investigation;

  save;
  move payment before investigation;
  evaluate;
```

```

recall;
modify payment type;
evaluate;

quit;

```

The optimal decision summary given in [Output 5.5.5](#) shows that the ratio of the value of investigation that the loan officer currently engages in to the value of the loan is $0.1242 - 0.0909 = 0.0333$ to 1.

Output 5.5.5. Summary of the Loan Grant Decision with 1 Unit Loan

Loan Grant Decision		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	
Investigation	Decision	
Recommendation	Chance	
Application	Decision	
Payment	Chance	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Expected Value (MAXEV)	
Optimal Decision Yields:	0.1242	
Optimal Decision Policy		
Up to Stage Investigation		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value
Order investigation		0.1242*
Do not order		0.0909

The following messages are written to the SAS log:

```

NOTE: Present order of stages:

      Investigation(D), Recommendation(C), Application(D),
      Payment (C), _ENDST_ (E) .

NOTE: The current problem has been successfully saved.

NOTE: Present order of stages:

      Payment (C), Investigation(D), Recommendation(C),
      Application(D), _ENDST_ (E) .

NOTE: The currently optimal decision yields 0.1464.

```

NOTE: The original problem has been successfully recalled.

NOTE: Present order of stages:

```
Investigation(D), Recommendation(C), Application(D),
Payment(C), _ENDST_(E).
```

NOTE: The type of stage Payment has been changed.

NOTE: The currently optimal decision yields 0.15.

The preceding messages show that the ratio of the value of perfect investigation to the value of a loan is $0.1464 - 0.0909 = 0.0555$ to 1, and the ratio of the maximum amount the officer should pay for perfect control to the value of loan is $0.15 - 0.0909 = 0.591$ to 1.

Output 5.5.6 on page 431, produced by the following statements, shows a table of the values of the investigation currently engaged in, the values of perfect investigation, and the values of perfect control for loans ranging from \$10,000 to \$100,000.

```
/* create the data set for value of loan */
/* and corresponding values of services */
data Datav6(drop=k ratio1 ratio2 ratio3);
  label loan="Value of Loan"
        vci="Value of Current Credit Investigation"
        vpi="Value of Perfect Credit Investigation"
        vpc="Value of Perfect Collecting Service";

  /* calculate ratios */
  ratio1=0.1242-0.0909;
  ratio2=0.1464-0.0909;
  ratio3=0.15-0.0909;

  Loan=0;
  do k=1 to 10;

    /* set the value of loan */
    loan=loan+10000;

    /* calculate the values of various services */
    vci=loan*ratio1;
    vpi=loan*ratio2;
    vpc=loan*ratio3;

    /* output current observation */
    output;
  end;
run;

/* print the table of the value of loan */
/* and corresponding values of services */
title 'Value of Services by Value of Loan';
```

```
proc print label;
  format loan vci vpi vpc dollar12.0;
run;
```

Output 5.5.6. Values of Loan and Associated Values of Service

Value of Services by Value of Loan				
Obs	Value of Loan	Value of Current Credit Investigation	Value of Perfect Credit Investigation	Value of Perfect Collecting Service
1	\$10,000	\$333	\$555	\$591
2	\$20,000	\$666	\$1,110	\$1,182
3	\$30,000	\$999	\$1,665	\$1,773
4	\$40,000	\$1,332	\$2,220	\$2,364
5	\$50,000	\$1,665	\$2,775	\$2,955
6	\$60,000	\$1,998	\$3,330	\$3,546
7	\$70,000	\$2,331	\$3,885	\$4,137
8	\$80,000	\$2,664	\$4,440	\$4,728
9	\$90,000	\$2,997	\$4,995	\$5,319
10	\$100,000	\$3,330	\$5,550	\$5,910

Example 5.6. Petroleum Distributor's Decision Problem

The president of a petroleum distribution company currently faces a serious problem. His company supplies refined products to its customers under long-term contracts at guaranteed prices. Recently, the price for petroleum has risen substantially and his company will lose \$450,000 this year because of its long-term contract with a particular customer. After a great deal of discussion with his legal advisers and his marketing staff, the president learns that the contract contains a clause that may be beneficial to his company. The clause states that when circumstances are beyond its control, the company may ask its customers to pay the prevailing market prices for up to 10% of the promised amount.

Several scenarios are possible if the clause is invoked. If the customer accepts the invocation of the clause and agrees to pay the higher price for the 10%, the company would turn a loss of \$450,000 into a net profit of \$600,000. If the customer does not accept the invocation, the customer may sue for damages or accept a settlement of \$900,000 (resulting in a loss of \$400,000) or simply decline to press the issue. In any case, the distribution company could then sell the 10% on the open market for an expected value of \$500,000. However, the lawsuit would result in one of three possible outcomes: the company wins and pays no damages; the company loses and pays normal damages of \$1,500,000; the company loses and pays double damages of \$3,000,000. The lawyers also feel that this case might last three to five years if the customer decides to sue the company. The cost of the legal proceedings is estimated as \$30,000 for the initial fee and \$20,000 per year. The likelihood of the various outcomes are also assessed and reported as in [Table 5.38](#). Suppose that the company decides to use a discount rate of 10% to determine the present value of future funds.

Table 5.38. Likelihood of the Outcomes in the Petroleum Distributor's Decision

Uncertainty	Outcome	Probability
Customer's Response	Accept the Invocation	0.1
	Reject the Invocation	0.9
Customer's Action if the Invocation is being Rejected	Press the Issue	0.1
	Settle the Case	0.45
	Sue for Damages	0.45
Case Last	3 Years	0.3
	4 Years	0.4
	5 Years	0.3
Lawsuit Result	Pay No Damages	0.15
	Pay Normal Damages	0.65
	Pay Double Damages	0.2

The structure for this decision problem is given in the `STAGEIN=` data set named `Stage7`.

```

/* -- create the STAGEIN= data set                                -- */
data Stage7;
  format _OUTCOM1 $14. _OUTCOM2 $14. ;
  input _STNAME_ $ _STTYPE_ $ _OUTCOM1 $
        _SUCC1 $ _OUTCOM2 $ _SUCC2 $ ;
  datalines;
Action   D   Invoking           Response   Not_Invoking   .
Response C   Accept              .          Refuse       Lawsuit
Lawsuit  C   Press_Issue        .          Settle       .
.        .   Sue                Last        .             .
Last     C   3_Years            Result     4_Years      Result
.        .   5_Years            Result     .             .
Result   C   No_Damages          .          Normal_Damages .
.        .   Double_Damages     .          .             .
;

```

The `PROBIN=` data set `Prob7` contains the probability distributions for the chance nodes.

```

/* -- create the PROBIN= data set                                -- */
data Prob7;
  format _EVENT1_ _EVENT2_ $14.;
  input _EVENT1_ $ _PROB1_ _EVENT2_ $ _PROB2_ ;
  datalines;
Accept           0.1   Refuse           0.9
Press_Issue     0.1   Settle          0.45
Sue             0.45  .               .
3_Years        0.3   4_Years        0.4
5_Years        0.3   .               .
No_Damages     0.15  Normal_Damages 0.65
Double_Damages 0.20  .               .
;

```

The `PAYOFFS=` data set `Payoff7` defines the payoffs for the various scenarios.

```

/* -- create the PAYOFFS= data set          -- */
data Payoff7(drop=i j k D PCOST);
length _ACTION_ _STATE1-_STATE4 $16;

/* possible outcomes for the case last      */
array YEARS{3} $16. _TEMPORARY_ ('3_Years',
                                '4_Years',
                                '5_Years' );

/* numerical values for the case last      */
array Y{3}          _TEMPORARY_ (3, 4, 5);

/* possible outcomes for the size of judgment */
array DAMAGES{3} $16. _TEMPORARY_ ('No_Damages',
                                   'Normal_Damages',
                                   'Double_Damages' );

/* numerical values for the size of judgment */
array C{3}          _TEMPORARY_ (0, 1500, 3000);

D=0.1;                /* discount rate */

/* payoff for the scenario which the        */
/* 10 percent clause is not invoked        */
_ACTION_='Not_Invoking';  _VALUE_=-450;  output;

/* the clause is invoked */
_ACTION_='Invoking';

/* payoffs for scenarios which the clause is */
/* invoked and the customer accepts the     */
/* invocation                               */
_STATE1='Accept';          _VALUE_=600;  output;

/* the customer refuses the invocation      */
_STATE1='Refuse';

/* payoffs for scenarios which the clause is */
/* invoked and the customer refuses the     */
/* invocation but decline to press the issue */
_STATE2='Press_Issue';    _VALUE_=500;  output;

/* payoffs for scenarios which the clause is */
/* invoked and the customer refuses the     */
/* invocation but willing to settle out of  */
/* court for 900K                          */
_STATE2='Settle';         _VALUE_=500-900;  output;

/* the customer will sue for damages        */
_STATE2='Sue';
do i=1 to 3;

```

```

        _STATE3=YEARS{i};

        /* determine the cost of proceedings          */
        PCOST=30; /* initial cost of the proceedings */

        /* additional cost for every years in        */
        /* in present value                          */
        do k=1 to Y{i};
            PCOST=PCOST+(20/((1+D)**k));
        end;

        /* loop for all poss. of the lawsuit result */
        do j=1 to 3;
            _STATE4=DAMAGES{j}; /* the damage have to paid */

            /* compute the net return in present value */
            _VALUE_=500-PCOST-(C{j}/((1+D)**Y{i}));

            /* output an observation for the payoffs */
            /* of this scenario                          */
            output;
        end;
    end;

run;

/* -- print the payoff table                        -- */
title "Petroleum Distributor's Decision";
title3 "Payoff table";

proc print;
run;

```

The payoff table of this problem is displayed in [Output 5.6.1](#).

Output 5.6.1. Payoffs for the Petroleum Distributor's Problem

Petroleum Distributor's Decision						
Payoff table						
Obs	_ACTION_	_STATE1	_STATE2	_STATE3	_STATE4	_VALUE_
1	Not_Invoking					-450.00
2	Invoking	Accept				600.00
3	Invoking	Refuse	Press_Issue			500.00
4	Invoking	Refuse	Settle			-400.00
5	Invoking	Refuse	Sue	3_Years	No_Damages	420.26
6	Invoking	Refuse	Sue	3_Years	Normal_Damages	-706.71
7	Invoking	Refuse	Sue	3_Years	Double_Damages	-1833.68
8	Invoking	Refuse	Sue	4_Years	No_Damages	406.60
9	Invoking	Refuse	Sue	4_Years	Normal_Damages	-617.92
10	Invoking	Refuse	Sue	4_Years	Double_Damages	-1642.44
11	Invoking	Refuse	Sue	5_Years	No_Damages	394.18
12	Invoking	Refuse	Sue	5_Years	Normal_Damages	-537.20
13	Invoking	Refuse	Sue	5_Years	Double_Damages	-1468.58

Note that the payoffs of the various scenarios in [Output 5.6.1](#) are in thousands of dollars and are *net present values* (NPV) (Baird 1989). For example, the payoff for the following scenario “invoking the clause; the customer refuses to accept this and sues for damages; the case lasts four years and the petroleum distribution company loses and pays double damages” is calculated as

$$\begin{aligned} \text{Payoff} &= 500 - \text{NPV of proceedings cost} \\ &\quad - \text{NPV of damages of 3,000,000} \\ &= -1642.44 \end{aligned}$$

where

$$\text{NPV of proceedings cost} = 30 + \sum_{k=1}^4 20/(1 + 0.1)^k$$

and

$$\text{NPV of damages of 3,000,000} = 3000/(1 + 0.1)^4$$

This is because the company can sell the 10% for \$500,000 immediately and pay the \$3,000,000 damages four years from now. The net present value of the proceedings is determined by paying the \$30,000 initial fee now and a fee of \$20,000 after every year up to four years. The value of 0.1 is the discount rate used.

The following statements evaluate the problem and plot the optimal solution.

```

/* -- define colors list                                -- */
options colors=(black);

/* -- define title                                      -- */
title f=zapfb h=2.5 "Petroleum Distributor's Decision";

/* -- PROC DTREE statements                             -- */
proc dtree stagein=Stage7 probin=Prob7 payoffs=Payoff7;
  evaluate / summary;
  treeplot / graphics compress nolg name="dt6p1"
            ybetween=1 cell lwidth=8 lwidthb=20 hsymbol=3;

quit;

```

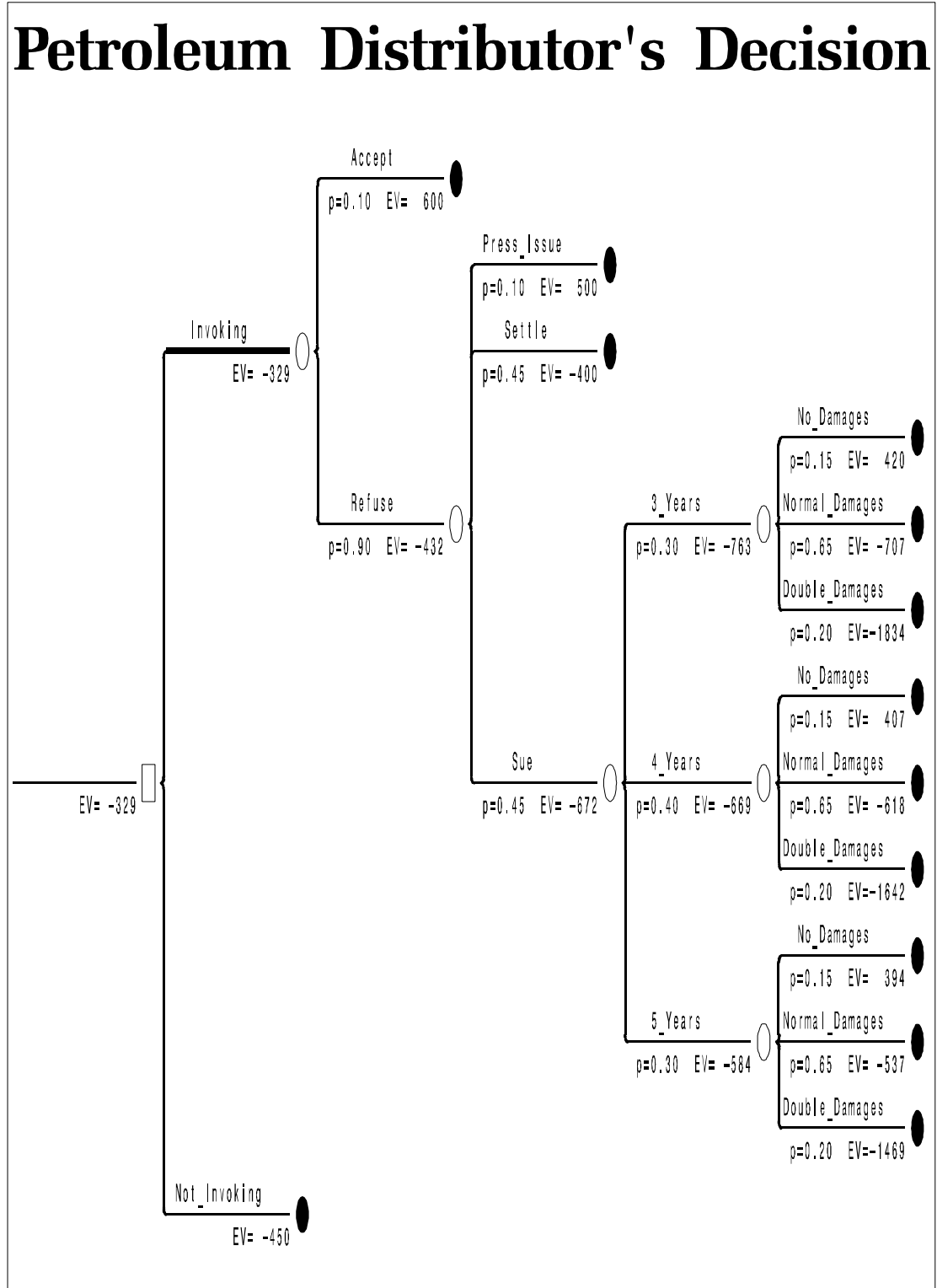
The optimal decision summary in [Output 5.6.2](#) suggests that the president should invoke the 10% clause because it would turn a loss of \$450,000 into an expected loss of \$329,000 in present value.

Output 5.6.2. Summary of the Petroleum Distributor's Decision

Petroleum Distributor's Decision		
The DTREE Procedure		
Optimal Decision Summary		
Order of Stages		
Stage	Type	
-----	-----	
Action	Decision	
Response	Chance	
Lawsuit	Chance	
Last	Chance	
Result	Chance	
ENDST	End	
Decision Parameters		
Decision Criterion:	Maximize Expected Value (MAXEV)	
Optimal Decision Yields:	-329	
Optimal Decision Policy		
Up to Stage Action		
Alternatives or Outcomes	Cumulative Reward	Evaluating Value
-----	-----	
Invoking		-329*
Not_Invoking		-450

The decision tree for this problem is shown in [Output 5.6.3](#). There you can find the expected value of each scenario.

Output 5.6.3. Decision Tree for the Petroleum Distributor's Decision



The president feels that the estimated likelihood of lawsuit outcomes is fairly reliable. However, the assessment of the likelihood of the customer's response and reaction is

extremely difficult to estimate. Because of this, the president would like to keep the analysis as general as possible. His staff suggests using the symbols p and q to represent the probability that the customer will accept the invocation and the probability that the customer will decline to press the issue if he refuses the invocation, respectively. The probabilities of the other possible outcomes about the customer's response and reaction to the invocation of the 10% clause are listed in [Table 5.39](#).

Table 5.39. Probabilities of the Petroleum Distributor's Decision

Uncertainty	Outcome	Probability
Customer's Response	Accept the Invocation	p
	Reject the Invocation	$1 - p$
Customer's Action if the Invocation is being Rejected	Press the Issue	q
	Settle the Case	$(1 - q)/2$
	Sue for Damages	$(1 - q)/2$

Now from the decision tree shown in [Output 5.6.3](#) on page 437, the expected value of the outcome '**Refuse**' is

$$\begin{aligned}
 EV &= 500q - 400(1 - q)/2 - 672(1 - q)/2 \\
 &= 500q - 200 + 200q - 336 + 336q \\
 &= 1036q - 536
 \end{aligned}$$

Hence, the expected payoff if the petroleum distribution company invokes the clause is

$$\begin{aligned}
 EV &= 600p + (1036q - 536)(1 - p) \\
 &= 1136p + 1036q - 1036pq - 536 \\
 &= 1136p + 1036(1 - p)q - 536
 \end{aligned}$$

Therefore, the president should invoke the 10% clause if

$$1136p + 1036(1 - p)q - 536 > -450$$

or

$$q > \frac{86 - 1136p}{1036 - 1036p}$$

This result is depicted in [Output 5.6.4](#) on page 440, which is produced by the following statements:

```

/* -- create data set for decision diagram      -- */
data Data7(drop=i);
  P=0.0;                                     /* initialize P */

  /* loop for all possible values of P */
  do i=1 to 21;

    /* determine the corresponding Q */
    Q=(86-(1136*P))/(1036*(1.0-P));
    if Q < 0.0 then Q=0.0;

    /* output this data point */
    output;

    /* set next possible value of P */
    P=P+0.005;
  end;

run;

/* create the ANNOTATE= data set for labels of */
/* decision diagram */
data label;
  length FUNCTION STYLE COLOR $8;
  length XSYS YSYS          $1;
  length WHEN POSITION       $1;
  length X Y                8;
  length SIZE ROTATE        8;

  WHEN = 'A';
  POSITION='0';
  XSYS='2';
  YSYS='2';
  input FUNCTION $ X Y STYLE $ SIZE COLOR $
         ROTATE TEXT $ & 16.;
  datalines;
label  0.01    0.04    centx  2    black  .    Do Not
label  0.01    0.03    centx  2    black  .    Invoke
label  0.01    0.02    centx  2    black  .    The Clause
label  0.06    0.06    centx  2    black  .    Invoke The
label  0.06    0.05    centx  2    black  .    Clause
;

/* -- set graphics environment      -- */
goptions lfactor=3;

/* -- define symbol characteristics for boundary -- */
symbol1 i=joint v=NONE l=1 ci=black;

```

```

/* -- define pattern for area fill          -- */
pattern1 value=M2N0 color=black;
pattern2 value=M2N90 color=black;

/* -- define axis characteristics          -- */
axis1 label=('Pr(Accept the Invocation)')
      order=(0 to 0.1 by 0.01) minor=none;
axis2 label=(angle=90 'Pr(Press the Issue)')
      order=(0 to 0.1 by 0.01) minor=none;

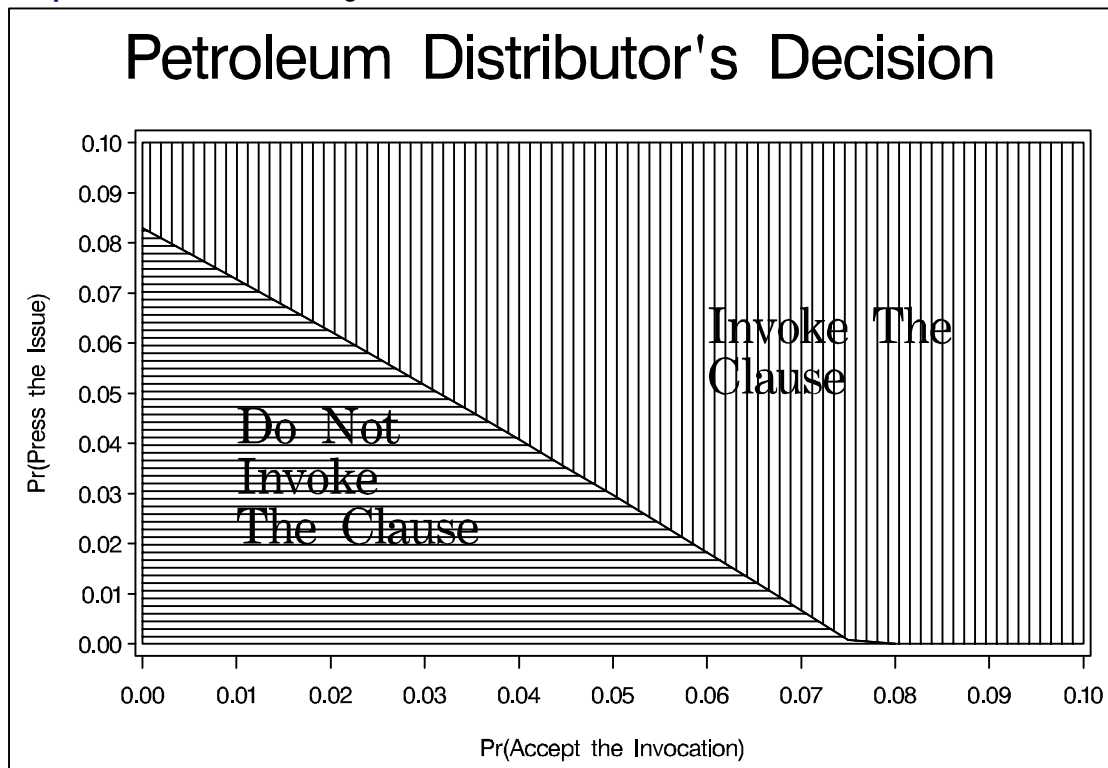
/* -- plot decision diagram                -- */
title h=2.5 "Petroleum Distributor's Decision";
proc gplot data=Data7 ;
  plot Q*P=1 / haxis=axis1
              vaxis=axis2
              annotate=label
              name="dt 6p2"
              frame
              areas=2;

run;

quit;

```

Output 5.6.4. Decision Diagram for the Petroleum Distributor's Problem



The decision diagram in [Output 5.6.4](#) is an analysis of the sensitivity of the solution to the probabilities that the customer will accept the invocation and that the customer will decline to press the issue. He should invoke the clause if he feels the customer's probabilities of outcomes '**Accept**' and '**Press_Issue**', p and q , are located

in the upper-right area marked as 'Invoke The Clause' in [Output 5.6.4](#) and should not invoke the clause otherwise. Note that the values $p = 0.1$ and $q = 0.1$ used in this example are located on the upper right corner on the diagram.

Statement and Option Cross-Reference Tables

The following tables reference the statements and options in the DTREE procedure (except the [PROC DTREE](#) statement and the [QUIT](#) statement) that are illustrated by the examples in this section.

Table 5.40. Statements Specified in Examples

Statement	Examples					
	1	2	3	4	5	6
EVALUATE	X	X	X	X	X	X
MODIFY					X	
MOVE					X	
RECALL					X	
RESET	X					
SAVE					X	
SUMMARY	X	X			X	
TREEPLOT			X	X		X
VARIABLES	X					
VPC					X	
VPI					X	

Table 5.41. Options Specified in Examples

Option	Examples					
	1	2	3	4	5	6
ANNOTATE=				X		
COMPRESS			X	X		X
CRITERION=	X	X		X		
EVENT=	X					
FTEXT=			X			X
GRAPHICS			X	X		X
HSYMBOL=			X			X
HTEXT=			X			
LINKA=				X		
LINKB=				X		
LINKC=						
LSTYLEB=			X			
LWIDTH=			X			X
LWIDTHB=			X			X
NAME=			X	X		X
NOLEGEND				X		X
NOWARNING	X	X	X		X	
OUTCOME=	X					
PAYOFFS=	X	X	X	X	X	X
PROB=	X					
PROBIN=	X	X	X	X	X	X
REWARD=	X					
RT=	X	X		X		
STAGE=	X					
STAGEIN=	X	X	X	X	X	X
STATE=	X					
SUCCESSOR=	X					
SUMMARY					X	X
SYMBOLC=				X		
SYMBOLD=				X		
SYMBOLE=				X		
TARGET=	X	X			X	
TYPE=	X					
VALUE=	X					
YBETWEEN=			X			X

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Chapter 6

The GANTT Procedure

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Chapter 6

The GANTT Procedure

Overview

The GANTT procedure produces a Gantt chart that is a graphical scheduling tool for the planning and control of a project. In its most basic form, a Gantt chart is a bar chart that plots the tasks of a project versus time. PROC GANTT displays a Gantt chart corresponding to a project schedule such as that produced by the CPM procedure or one that is input directly to the procedure, and it offers several options and statements for tailoring the chart to your needs.

Using PROC GANTT, you can plot the predicted early and late schedules and identify critical, supercritical, and slack activities. In addition, you can visually monitor a project in progress with the actual schedule and compare the actual schedule against a target baseline schedule. You can also graphically view the effects of scheduling a project subject to resource limitations. Any combination of these schedules can be viewed simultaneously (provided the relevant data exist) together with any user-specified variables of interest, such as project deadlines and other important dates. PROC GANTT enables you to display the early, late, and actual schedules in a single bar to produce a more meaningful schedule for tracking an activity in progress.

PROC GANTT can display the [project logic](#) on the Gantt chart by exhibiting dependencies between tasks using directed arcs to link the related activities. You can use either the Activity-on-Arc (AOA) or Activity-on-Node (AON) style of input for defining the project network. In addition, the GANTT procedure recognizes nonstandard precedence types. With PROC GANTT, you can display weekends, holidays, and multiple calendars, and you can depict milestones, reference lines, and a timenow line on the chart. PROC GANTT enables you to annotate text and graphics on the Gantt chart and provides you with a wide variety of options to control and customize the graphical appearance of the chart.

The GANTT procedure also supports an [automatic text annotation](#) facility that is designed specifically for labeling Gantt charts independently of the SAS/GRAPH Annotate facility. It enables you to display label strings with a minimum of effort and data entry while providing the capability for more complex chart labeling situations. An important feature of this facility is the ability to link label coordinates and text strings to variables in the Schedule data set. This means that you can preserve the Label data set even though the schedule dates may change. Several options enable you to customize the annotation, such as the clipping of text strings that run off the page or the chart and the specification of a split character to split labels that are too long.

Using the GANTT procedure, you can produce a wide variety of Gantt charts. You can generate zoned Gantt charts with several options to control its appearance. You can display a zone variable column as well as draw a line demarcating the different

zones. You can also control the bar height and bar offset of each type of schedule bar. This enables you to change the display order of the schedules as well as giving you the capability to produce a Gantt chart with embedded bars. You can override the default schedule bar pattern assignments at the activity level. In addition, you can restrict the schedule types to which the specified pattern is to be applied. You can also override the text color for selected columns of activity text at the activity level. These features facilitate the production of multiproject and multiprocess Gantt charts. Finally, you can also associate HTML pages with activity bars and create Web-enabled Gantt charts.

The GANTT procedure enables you to control the number of pages output by the procedure in both horizontal and vertical directions. In addition, you can control the number of jobs displayed per page as well as the number of tickmarks displayed per page. You can display ID variables on every page and even let the procedure display the maximum number of ID variables that can fit on one page. You can number the pages, justify the Gantt chart in the horizontal and vertical directions with respect to the page boundaries, and maintain the original aspect ratio of the Gantt chart on each page.

PROC GANTT gives you the option of displaying the Gantt chart in one of three modes: line-printer, full-screen, or graphics mode. The default mode is graphics mode, which enables you to produce charts of high resolution quality. Graphics mode requires SAS/GRAPH software. See the “[Graphics Version](#)” section on page 500 for more information on producing high-quality Gantt charts. You can also produce line-printer quality Gantt charts by specifying the `LINEPRINTER` option in the PROC GANTT statement. In addition to submitting the output to either a plotter or printer, you can view the Gantt chart at the terminal in full-screen mode by specifying the `FULLSCREEN` option in the PROC GANTT statement. See the “[Full-Screen Version](#)” section on page 496 for more information on viewing Gantt charts in full-screen mode. The GANTT procedure also produces a macro variable that indicates the status of the invocation and also contains other useful statistics about the Gantt charts generated by the invocation.

There are several distinctive features that characterize the appearance of the chart produced by the GANTT procedure:

- The horizontal axis represents time, and the vertical axis represents the sequence of observations in the data set.
- Both the time axis and the activity axis can be plotted across more than one page.
- The procedure automatically provides extensive labeling of the time axis, enabling you to determine easily the exact time of events plotted on the chart. The labels are determined on the basis of the formats of the times being plotted. You can also specify user-defined formats for the labeling.
- In graphics mode, the `COMPRESS` option in the `CHART` statement enables you to produce the entire Gantt chart on one page. The `PCOMPRESS` option enables you to produce the entire Gantt chart on one page while maintaining the original aspect ratio of the Gantt chart. Both these options work in conjunction

with the `HPAGES=` and `VPAGES=` options, which specify the number of pages in the horizontal and vertical directions for the chart.

Project information is communicated into PROC GANTT using SAS data sets. The input data sets used by PROC GANTT are as follows:

- **The `Schedule` data set** contains the early, late, actual, resource-constrained, and baseline schedules and any other activity-related information. The activity-related information can include precedence information, calendar used by the activity, special dates, and any other information that you want to identify with each activity. This data set can be the same as the Schedule data set produced by `PROC CPM`, or it can be created separately by a DATA step. Each observation in the Schedule data set represents an activity and is plotted on a separate row of the chart unless activity splitting during resource-constrained scheduling has caused an activity to split into disjoint segments. For details regarding the output format in this case, see the “[Displayed Output](#)” section on page 525.
- **The `Precedence (Logic)` data set** contains the precedence information of the project in `AON` format in order to draw a Logic Gantt chart of the project. Specifying this data set is not necessary if the precedence information exists in the Schedule data set. If the data set is specified, however, the `ACTIVITY` variable must exist in both the Schedule and Precedence data sets.

Typically you would use this feature when scheduling in `PROC CPM` with nonstandard precedence constraints where the `LAG` variables are not transferred to the Schedule data set or with the `COLLAPSE` option. Setting the Precedence data set for PROC GANTT to be the Activity data set (used in `PROC CPM`) establishes the required precedence relationships. This is also a convenient feature when drawing several Gantt charts for the same project with different schedule information (such as when monitoring a project in progress). Specifying a Precedence data set avoids having to duplicate the precedence information in every Schedule data set.

- **The `Label` data set** contains the label information of the project that enables you to draw labeled Gantt charts independently of the SAS/GRAPH Annotate facility. It requires a minimum of effort and provides you with a convenient mechanism to link label strings and their coordinates to variables in the Schedule data set. Another convenient feature is its ability to replicate labels across all activities. Both these features facilitate reuse of the Label data set.
- **The `Workday` and the `Calendar` data sets** together enable you to represent any type of work pattern, during a week and within each day of the week, on the Gantt chart. The same Workday and Calendar data sets used by `PROC CPM` can also be passed to PROC GANTT.
- **The `Holiday` data set** enables you to associate standard holidays and vacation periods with each calendar and represent them on the Gantt chart. Like the Workday and Calendar data sets, the same Holiday data set used by `PROC CPM` can also be used by PROC GANTT.

- **The [Annotate data set](#)** contains the graphics and text that are to be annotated on the Gantt chart. This data set is used by the GANTT procedure in conjunction with the Annotate facility in SAS/GRAPH software.

The GANTT procedure produces one output data set.

- **The [Imagemap data set](#)** contains the outline coordinates for the schedule bars used in the Gantt chart that can be used to generate HTML MAP tags.

When displaying the precedence relationships between activities on the Gantt chart, bear in mind the following facts with regard to data sets used by PROC GANTT:

- The Schedule data set (and optionally the Precedence data set) contains the variables that define the precedence relationships between activities in the project.
- You can handle nonstandard precedence constraints in PROC GANTT when using [AON](#) format by identifying the [LAG](#) variables in the [CHART](#) statement.
- When you use [PROC CPM](#) to produce the schedule for a project with nonstandard precedence relationships, the [LAG](#) variables are not automatically included in the Schedule data set. Use an [ID](#) statement or the [XFERVAR](#)s option in the [PROC CPM statement](#) to add them.
- When you generate the schedule using [PROC CPM](#) with the [COLLAPSE](#) option, it is recommended that you use the Activity data set to define the precedence relationships for the Gantt procedure by specifying the [PRECDATA=](#) option in the [PROC GANTT statement](#). This ensures that all the relevant precedence information is extracted.

Each option and statement available in the GANTT procedure is explained in the “[Syntax](#)” section on page 454. The “[Examples](#)” section on page 529 illustrates most of these options and statements.

Getting Started

In order to draw a Gantt chart, at the very minimum you need a [Schedule](#) data set. This data set is expected to be *similar* to the [OUT=](#) Schedule data set produced by [PROC CPM](#), with each observation representing an activity in the project. It is possible to obtain a detailed Gantt chart by specifying the single statement

```
PROC GANTT DATA= SAS-data-set ;
```

where the data set specified is the Schedule data set produced by [PROC CPM](#).

As an example of this, consider the software development project in the “Getting Started” section in [Chapter 2](#), “[The CPM Procedure](#).” The output schedule for this example is saved in a data set, [INTRO1](#), which is displayed in [Figure 6.1](#).

Project Schedule						
Obs	activity	succesr1	succesr2	duration	descript	
1	TESTING	RECODE		20	Initial Testing	
2	PRELDOC	DOCEDREV	QATEST	15	Prel. Documentation	
3	MEETMKT	RECODE		1	Meet Marketing	
4	RECODE	DOCEDREV	QATEST	5	Recoding	
5	QATEST	PROD		10	QA Test Approve	
6	DOCEDREV	PROD		10	Doc. Edit and Revise	
7	PROD			1	Production	
Obs	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	01MAR04	20MAR04	01MAR04	20MAR04	0	0
2	01MAR04	15MAR04	11MAR04	25MAR04	10	10
3	01MAR04	01MAR04	20MAR04	20MAR04	19	19
4	21MAR04	25MAR04	21MAR04	25MAR04	0	0
5	26MAR04	04APR04	26MAR04	04APR04	0	0
6	26MAR04	04APR04	26MAR04	04APR04	0	0
7	05APR04	05APR04	05APR04	05APR04	0	0

Figure 6.1. Software Project Plan

The following code produces the Gantt chart shown in [Figure 6.2](#).

```
proc gantt lineprinter data=intro1;
run;
```

The DATA= option could be omitted if the INTRO1 data set is the most recent data set created; by default, PROC GANTT uses the `_LAST_` data set.

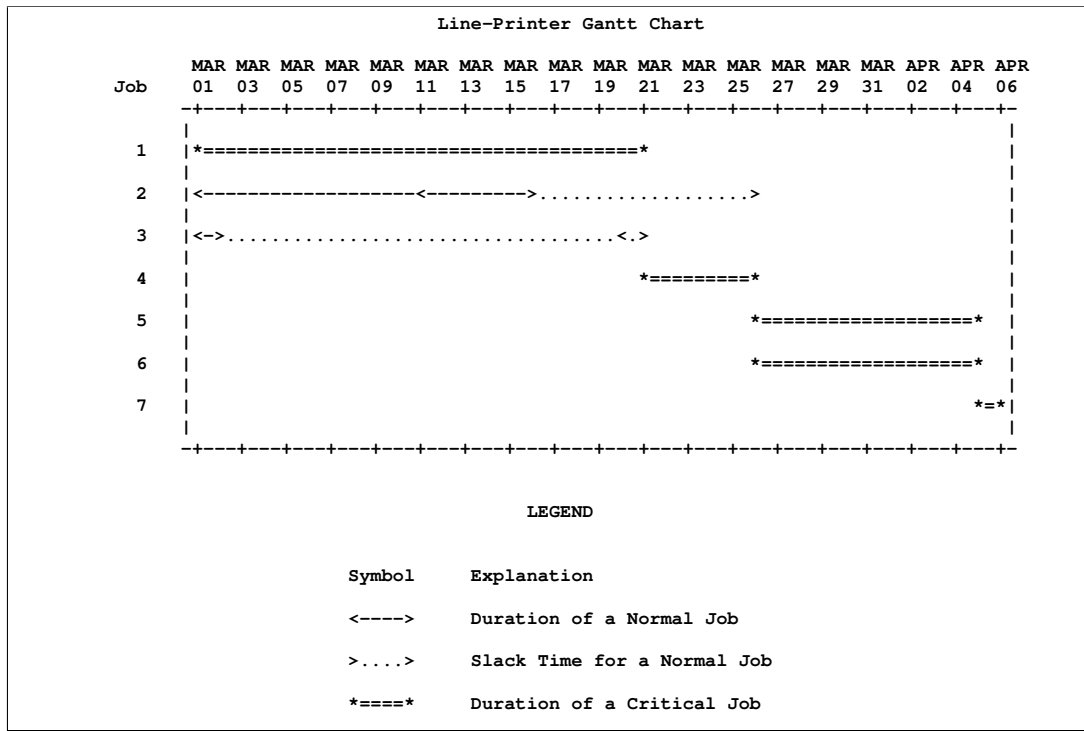


Figure 6.2. Line-Printer Gantt Chart

You can produce a high-resolution graphics quality Gantt chart by specifying the GRAPHICS option instead of the LINEPRINTER option in the PROC GANTT statement. Graphics mode is also the default display mode. The resulting Gantt chart is shown in [Figure 6.3](#).

```
proc gantt graphics data=introl;
run;
```

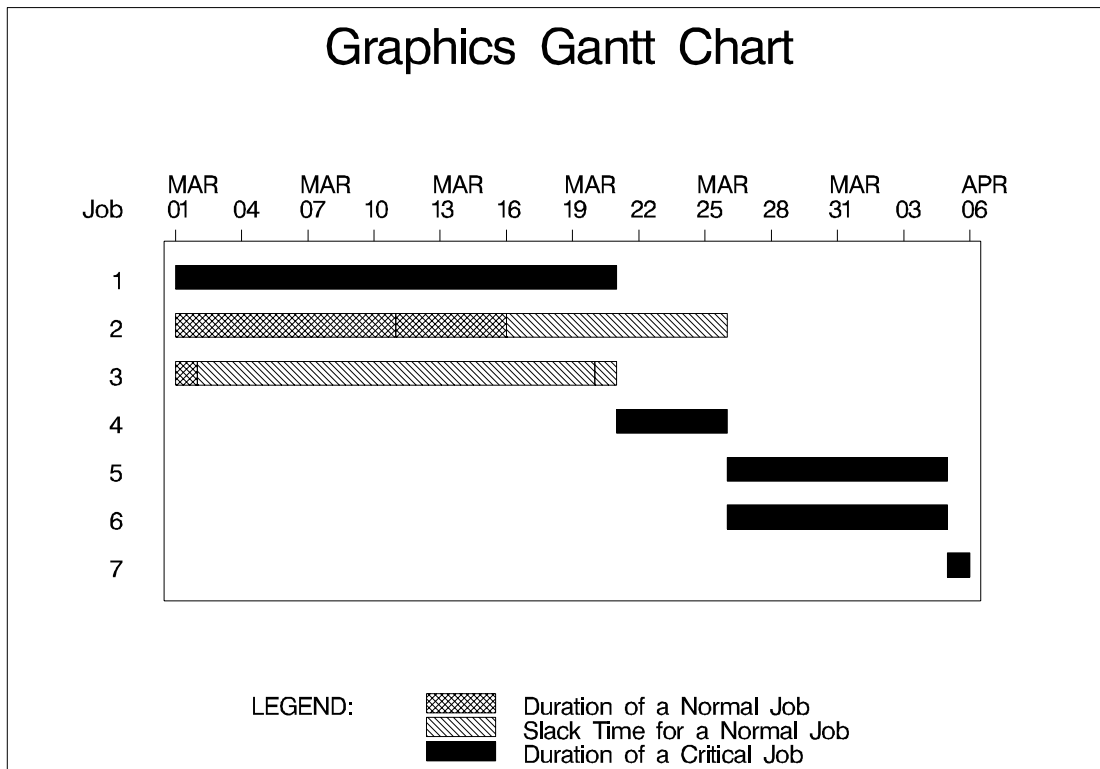


Figure 6.3. Graphics Gantt Chart

Finally, you can draw a Logic Gantt chart by defining the precedence information to PROC GANTT in AON format using the ACTIVITY= and SUCCESSOR= options in the CHART statement. The Logic Gantt chart is shown in [Figure 6.4](#).

```
proc gantt data=introl;
  chart / activity=activity successor=(succesr1-succesr2);
run;
```

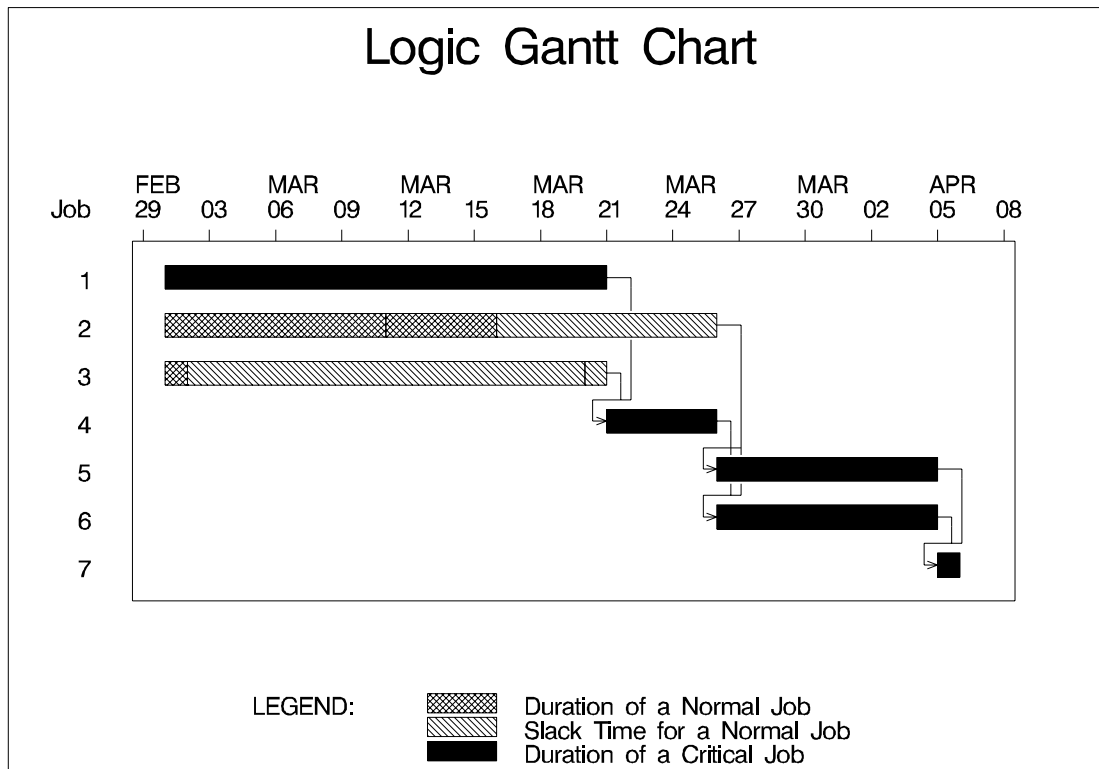


Figure 6.4. Logic Gantt Chart

For further examples illustrating typical invocations of the GANTT procedure when managing projects, see [Chapter 1, “Introduction to Project Management.”](#)

Syntax

The following statements are used in PROC GANTT:

```

PROC GANTT options ;
  BY variables ;
  CHART specifications / options ;
  ID variables ;

```

Functional Summary

The following tables outline the options available for the GANTT procedure classified by function.

Table 6.1. Axis Formatting Options

Description	Statement	Option
increment for labeling axis	CHART	INCREMENT=
ending time for axis	CHART	MAXDATE=
starting time for axis	CHART	MINDATE=
smallest interval identified on chart	CHART	MININTERVAL=
suppress time portion of datetime tickmark	CHART	NOTMTIME
number of columns per mininterval	CHART	SCALE=
use first plot variable format for tickmarks	CHART	USEFORMAT

Table 6.2. Bar Enhancement Options

Description	Statement	Option
actual bar height	CHART	ABARHT=
actual bar offset	CHART	ABAROFF=
default bar height	CHART	BARHT=
default bar offset	CHART	BAROFF=
baseline bar height	CHART	BBARHT=
baseline bar offset	CHART	BBAROFF=
color of connect line	CHART	CHCON=
early/late bar height	CHART	EBARHT=
early/late bar offset	CHART	EBAROFF=
holiday bar height	CHART	HBARHT=
holiday bar offset	CHART	HBAROFF=
character for drawing connect line	CHART	HCONCHAR=
draw a horizontal connect line	CHART	HCONNECT
characters for drawing schedule	CHART	JOINCHAR=
line style of connect line	CHART	LHCON=
suppress pattern variable for bar fills	CHART	NOPATBAR
overprint character for schedule variables	CHART	OVERLAPCH=
overprint character for CHART variables	CHART	OVPCHAR=
schedule types that use pattern variable	CHART	PATLEVEL=
pattern variable for bar fills and text color	CHART	PATTERN=
resource bar height	CHART	RBARHT=
resource bar offset	CHART	RBAROFF=
characters for plotting times	CHART	SYMCHAR=

Table 6.3. Calendar Options

Description	Statement	Option
calendar identifier	CHART	CALID=
length of workday	CHART	DAYLENGTH=
beginning of workday	CHART	DAYSTART=
mark all breaks in a day	CHART	MARKBREAK
mark all non-working days	CHART	MARKWKND

Table 6.4. Data Set Options

Description	Statement	Option
Annotate data set	GANTT	ANNOTATE=
Calendar data set	CHART	ANNOTATE=
Schedule data set	GANTT	CALEDATA=
Holiday data set	GANTT	DATA=
Imagemap output data set	GANTT	HOLIDATA=
Label data set	GANTT	IMAGEMAP=
Precedence (Logic) data set	GANTT	LABDATA=
Work pattern data set	GANTT	PRECDATA=
		WORKDATA=

Table 6.5. Graphics Catalog Options

Description	Statement	Option
description of catalog entry	CHART	DESCRIPTION=
name of graphics catalog	GANTT	GOUT=
name of catalog entry	CHART	NAME=

Table 6.6. Holiday Options

Description	Statement	Option
character for plotting holidays	CHART	HOLICHAR=
holiday start variable	CHART	HOLIDAY=
holiday duration variable	CHART	HOLIDUR=
holiday finish variable	CHART	HOLIFIN=
holiday duration units	CHART	INTERVAL=

Table 6.7. ID Variable Options

Description	Statement	Option
number of columns between ID variables	CHART	BETWEEN=
mark critical activities	CHART	CRITFLAG
activity text columns that use pattern color	CHART	CTEXTCOLS=
allow duplicate ID values	CHART	DUPOK
display ID variables on every page	CHART	IDPAGES
maximize number of ID variables on page	CHART	MAXIDS
suppress job number	CHART	NOJOBNUM
split character for dividing ID labels	GANTT	SPLIT=
strip leading blanks from character variables	GANTT	STRIPIDBLANKS

Table 6.8. Labeling Options

Description	Statement	Option
label variable linking to Schedule data set	CHART	LABVAR=
rules for label layout	CHART	LABRULE=
split character for labels	CHART	LABSPLIT=
maximum number of digits in integer label	GANTT	LABMAXINT=

Table 6.9. Logic Options

Description	Statement	Option
activity variable for AON format	CHART	ACTIVITY=
use AOA precedence specifications	CHART	AOA
color of precedence connections	CHART	CPREC=
headnode variable for AOA format	CHART	HEAD=
lag variable for AON format	CHART	LAG=
schedule bar associated with connections	CHART	LEVEL=
line style of precedence connections	CHART	LPREC=
maximum displacement of local vertical	CHART	MAXDISLV=
minimum interdistance of global verticals	CHART	MININTGV=
minimum offset of global vertical	CHART	MINOFFGV=
minimum offset of local vertical	CHART	MINOFFLV=
suppress drawing arrow head	CHART	NOARROWHEAD
suppress automatic range extension	CHART	NOEXTRANGE
terminate procedure if bad precedence data	CHART	SHOWPREC
successor variable for AON format	CHART	SUCCESSOR=
tailnode variable for AOA format	CHART	TAIL=
width of precedence connections	CHART	WPREC=

Table 6.10. Milestone Options

Description	Statement	Option
color of milestone	CHART	CMILE=
duration variable	CHART	DUR=
font for milestone symbol	CHART	FMILE=
height of milestone	CHART	HMILE=
character for milestone	CHART	MILECHAR=
value for milestone symbol	CHART	VMILE=

Table 6.11. Miscellaneous Options

Description	Statement	Option
invoke full-screen version	GANTT	FS
invoke graphics version	GANTT	GRAPHICS
invoke line-printer version	GANTT	LP
maximum number of decimals for a number	GANTT	MAXDEC=
unit for padding finish times	CHART	PADDING=
upper limit on number of pages	CHART	PAGES=
display summary of symbols and patterns	CHART	SUMMARY

Table 6.12. Page Layout Options

Description	Statement	Option
position chart at bottom of page	CHART	BOTTOM
color for drawing axes	CHART	CAXIS=
color for frame fill	CHART	CFRAME=
width of chart axis area	CHART	CHARTWIDTH=
draw chart on one page in graphics mode	CHART	COMPRESS
fill each page as much as possible	CHART	FILL
characters for table outlines and dividers	CHART	FORMCHAR=
number of pages spanning time axis	CHART	HPAGES=
left justify chart	CHART	LEFT
line width	CHART	LWIDTH=
number of activities on each page	CHART	NJOBS=
suppress frame	CHART	NOFRAME
suppress legend	CHART	NOLEGEND
suppress page number at upper right corner	CHART	NOPAGENUM
number of tickmarks on each page	CHART	NTICKS=
display page number at upper right corner	CHART	PAGENUM
draw chart proportionally on one page	CHART	PCOMPRESS
right justify chart	CHART	RIGHT
number of rows between consecutive activities	CHART	SKIP=
position chart at top of page	CHART	TOP
number of pages spanning activity axis	CHART	VPAGES=

Table 6.13. Reference Line Options

Description	Statement	Option
color of reference lines	CHART	CREF=
values of reference lines	CHART	REF=
character for drawing reference line	CHART	REFCHAR=
label reference lines	CHART	REFLABEL

Table 6.14. Schedule Selection Options

Description	Statement	Option
actual start variable	CHART	A_START=
actual finish variable	CHART	A_FINISH=
baseline start variable	CHART	B_START=
baseline finish variable	CHART	B_FINISH=
concatenate early/late and actual schedules	CHART	COMBINE
early start variable	CHART	E_START=
early finish variable	CHART	E_FINISH=
late start variable	CHART	L_START=
late finish variable	CHART	L_FINISH=
resource-constrained start variable	CHART	S_START=
resource-constrained finish variable	CHART	S_FINISH=

Table 6.15. Timenow Line Options

Description	Statement	Option
color of timenow line	CHART	CTNOW=
line style of timenow line	CHART	LTNOW=
suppress timenow label	CHART	NOTNLABEL
value of timenow line	CHART	TIMENOW=
character for drawing timenow line	CHART	TNCHAR=
width of timenow line	CHART	WTNOW=

Table 6.16. Text Formatting Options

Description	Statement	Option
color of text	CHART	CTEXT=
font of text	CHART	FONT=
height multiplier of text	CHART	HEIGHT=
height offset for activity text	CHART	HTOFF=

Table 6.17. Web Options

Description	Statement	Option
imagemap output data set	GANTT	IMAGEMAP=
web reference variable	CHART	WEB=

Table 6.18. Zone Options

Description	Statement	Option
color of zone line	CHART	CZONE=
line style of zone line	CHART	LZONE=
suppress zone column	CHART	NOZONECOL
display only new zone values	CHART	ONEZONEVAL
width of zone line	CHART	WZONE=
zone variable	CHART	ZONE=
offset of zone line	CHART	ZONEOFF=
span of zone line	CHART	ZONESPAN=

PROC GANTT Statement

PROC GANTT *options* ;

The following options can appear in the PROC GANTT statement.

ANNOTATE=SAS-data-set

ANNO=SAS-data-set

specifies the input data set that contains the appropriate Annotate variables for the purpose of adding text and graphics to the Gantt chart. The data set specified must be an Annotate-type data set. See also the “[Annotate Processing](#)” section on page 502 for information specifically on annotate processing with the GANTT procedure.

The data set specified with the ANNOTATE= option in the PROC GANTT statement is a “global” ANNOTATE= data set, in the sense that the information in this data set is

displayed on every Gantt chart produced in the current invocation of PROC GANTT. This option is available only in graphics mode.

See [Example 6.21](#), “Using the SAS/GRAPH ANNOTATE= Option,” for further illustration of this option.

CALEDATA=SAS-data-set

CALENDAR=SAS-data-set

identifies a SAS data set that specifies the work pattern during a standard week for *each* of the calendars that is to be used in the project. Each observation of this data set (also referred to as the Calendar data set) contains the name or the number of the calendar being defined in that observation, the names of the shifts or work patterns used each day, and, optionally, a standard workday length in hours. For details on the structure of this data set, see the “[Multiple Calendars and Holidays](#)” section on page 495. The work shifts referred to in the CALEDATA data set are defined in the [WORKDATA](#) data set.

DATA=SAS-data-set

names the SAS data set that carries the schedule information to be used by PROC GANTT. If the DATA= option is omitted, the most recently created SAS data set is used. This data set, also known as the Schedule data set, contains all the time variables (early, late, actual, resource-constrained, and baseline start and finish times, and any other variables to be specified in a [CHART](#) statement) that are to be plotted on the chart. For projects that use [multiple calendars](#), this data set also identifies the calendar that is used by each activity. The Schedule data set also contains precedence information when drawing a [Logic Gantt chart](#) in graphics mode. See the “[Schedule Data Set](#)” section on page 489 for more details.

FULLSCREEN

FS

indicates that the Gantt chart be drawn in full-screen mode. This mode enables you to scroll horizontally and vertically through the output using commands, pull-down menus, or function keys. See the “[Full-Screen Version](#)” section on page 496 for more information.

GOUT=graphics catalog

specifies the name of the graphics catalog used to save the output produced by PROC GANTT for later replay. This option is available only in graphics mode.

GRAPHICS

indicates that the Gantt chart produced be of high-resolution quality. This is the default mode of display. If you invoke the GANTT procedure in Graphics mode, but you do not have SAS/GRAPH software licensed at your site, the procedure stops and issues an error message. See the “[Graphics Version](#)” section on page 500 for more information.

HOLIDATA=SAS-data-set

names the SAS data set that specifies holidays. These holidays can be associated with specific calendars that are also identified in the HOLIDATA data set (also referred to as the Holiday data set). The HOLIDATA= option must be used with the [HOLIDAY=](#) option in the [CHART](#) statement, which specifies the variable in the SAS data set that

contains the start time of holidays. Optionally, the data set can include a variable that specifies the length of each holiday or a variable that identifies the finish time of each holiday (if the holidays are longer than one unit of the `INTERVAL=` option). For projects involving [multiple calendars](#), this data set can also include the variable named by the `CALID=` option that identifies the calendar to be associated with each holiday.

IMAGEMAP=SAS-data-set

names the SAS data set that receives a description of the areas of a graph and a link for each area. This information is for the construction of HTML image maps. You use a SAS DATA step to process the output file and generate your own HTML files. The graph areas correspond to the link information that comes from the `WEB` variable in the schedule data set. This gives you complete control over the appearance and structure of your HTML pages.

LABDATA=SAS-data-set

LABELDATA=SAS-data-set

LABEL=SAS-data-set

specifies the input data set that contains the label specific information. This option is required to initiate the [automatic text annotation](#) of the Gantt chart. See the “[Label Data Set](#)” section on page 520 for information on the variables it can contain. This option is available only in graphics mode.

LABMAXINT=n

LMI=n

specifies the maximum number of digits in the integer part when displaying an unformatted numeric as a string. The default value is 16. The maximum number of decimal positions is specified using the `MAXDEC=` option in the [PROC GANTT statement](#). This option is applicable only to labels defined with the Label data set.

LINEPRINTER

LP

indicates that the Gantt chart be drawn in line-printer mode.

MAXDEC=n

M=n

indicates the maximum number of decimal positions displayed for a number. A decimal specification in a format overrides a `MAXDEC=` specification. The default value of `MAXDEC=` is 2.

PRECDATA=SAS-data-set

names the SAS data set that contains the variables that define the precedence constraints in [AON](#) format. This data set is required if the [Schedule data set](#) does not contain the required precedence information as, for example, when the `COLLAPSE` option in [PROC CPM](#) causes some observations to be excluded from the Schedule data set. When this option is specified, it is mandatory that the `ACTIVITY` variable exist in both data sets and be identical in both type and length. This option is available only in graphics mode.

SPLIT=*'character'*

S=*'character'*

splits labels used as column headings where the split character appears. When you define the value of the split character, you must enclose it in single quotes. In PROC GANTT, column headings for **ID** variables consist of either variable labels (if they are present and space permits) or variable names. If the variable label is used as the column heading, then the split character determines where the column heading is to be split.

WORKDATA=*SAS-data-set*

WORKDAY=*SAS-data-set*

identifies a SAS data set that defines the work pattern during a standard working day. Each numeric variable in this data set (also referred to as the Workday data set) is assumed to denote a unique shift pattern during one working day. The variables must be formatted as SAS time values, and the observations are assumed to specify, alternately, the times when consecutive shifts start and end.

BY Statement

BY *variables ;*

A BY statement can be used with PROC GANTT to obtain separate Gantt charts for observations in groups defined by the BY variables. When a BY statement appears, the procedure expects the schedule data to be sorted in order of the BY variables. If your Schedule data set is not sorted, use the SORT procedure with a similar BY statement to sort the data. The chart for each BY group is formatted separately based only on the observations within that group.

CHART Statement

CHART *specifications / options ;*

The options that can appear in the CHART statement are listed below. The options are classified under appropriate headings: first, all options that are valid for all modes of the procedure are listed, followed by the options classified according to the mode (line-printer, full-screen, or graphics) of invocation of the procedure. Most of the options in line-printer and full-screen modes are also valid in graphics mode with similar interpretations. The differences and similarities in interpretation of the options are documented under the “[Mode-Specific Differences](#)” section on page 524.

General Options

The CHART statement controls the format of the Gantt chart and specifies additional variables (other than early, late, actual, resource-constrained, and baseline start and finish times) to be plotted on the chart. For example, suppose a variable that you want to specify in the CHART statement is one that contains the target finish date for each activity in a project; that is, if **FDATE** is a variable in the Schedule data set containing the desired finish date for each activity, the CHART statement can be used to mark the value of **FDATE** on the chart for each activity. A CHART specification can be one of the following types:

variable1 ... *variablen*
variable1='symbol1' ... *variablen*='symboln'
 (*variables*)='symbol1' ... (*variables*)='symboln'

variable1 ... *variablen*

indicates that each variable is to be plotted using the default symbol, the first character of the variable name. For example, the following statement

```
CHART SDATE FDATE;
```

causes the values of SDATE to be plotted with an 'S' and the values of FDATE with an 'F.'

variable1='symbol1' ... *variablen*='symboln'

indicates that each variable is to be plotted using the symbol specified. The symbol must be a single character enclosed in quotes.

(*variables*)='symbol1' ... (*variables*)='symboln'

indicates that each variable within the parentheses is to be plotted using the symbol associated with that group. The symbol must be a single character enclosed in single quotes. For example, the following statement

```
CHART (ED SD)='*'
      (FD LD)='+' ;
```

plots the values of the variables in the first group using an asterisk ('*') and the values of the variables in the second group using a plus sign ('+').

A single CHART statement can contain specifications in more than one of these forms. Also, each CHART statement produces a separate Gantt chart.

Note: It is not necessary to specify a CHART statement if default values are to be used to draw the Gantt chart.

The following options can appear in the CHART statement.

A_FINISH=*variable*

AF=*variable*

specifies the variable containing the actual finish time of each activity in the [Schedule data set](#). This option is not required if the default variable name A_FINISH is used.

A_START=*variable*

AS=*variable*

specifies the variable containing the actual start time of each activity in the [Schedule data set](#). This option is not required if the default variable name A_START is used.

B_FINISH=*variable*

BF=*variable*

specifies the variable containing the baseline finish time of each activity in the [Schedule data set](#). This option is not required if the default variable name B_FINISH is used.

B_START=variable**BS=variable**

specifies the variable containing the baseline start time of each activity in the [Schedule data set](#). This option is not required if the default variable name B_START is used.

BETWEEN=number

specifies the number of columns between two consecutive [ID](#) variable columns. This option gives you greater flexibility in spacing the ID columns. The default value of the BETWEEN= option is 3.

CALID=variable

specifies the variable in the [Schedule](#), [Holiday](#), and [Calendar](#) data sets that is used to identify the name or number of the calendar to which each observation refers. This variable can be either numeric or character depending on whether the different calendars are identified by unique numbers or names, respectively. If this variable is not found in any of the three data sets, PROC GANTT looks for a default variable named `_CAL_` in that data set (a warning message is issued to the log). For each activity in the [Schedule data set](#), this variable identifies the calendar that is used to mark the appropriate holidays and weekends for the activity. For further details, see the “[Multiple Calendars and Holidays](#)” section on page 495.

COMBINE

concatenates the early/late and actual schedule bars of an activity into a single bar and draws a timenow line on the Gantt chart. The COMBINE option does not affect the resource-constrained or baseline schedule bars. If the [TIMENOW=](#) option is not specified, it is implicitly assumed to exist and set to missing. The computation of TIMENOW is then carried out as described in the [TIMENOW=](#) option. Since the timenow line represents the instant at which a “snapshot” of the project is taken, values less than TIMENOW can be regarded as the “past” and values greater or equal to TIMENOW can be regarded as the “future.” The GANTT procedure uses this property of the timenow line to partition the chart into two regions; the region to the left of the timenow line reporting only the actual schedule (events that have already taken place), and the region to the right (including the timenow line) reporting only the predicted early/late schedule.

CRITFLAG**FLAG**

indicates that critical jobs be flagged as being critical or super-critical. An activity is critical if its total float is zero. If the total float is negative, the activity is super-critical. Critical activities are marked ‘CR,’ and super-critical activities are marked ‘SC’ on the left side of the chart.

DAYLENGTH=daylength

specifies the length of the workday. Each workday is plotted starting at the beginning of the day as specified in the [DAYSTART=](#) option and ending *daylength* hours later. The value of *daylength* should be a SAS time value. If the [INTERVAL=](#) option is specified as DTSECOND, DTMINUTE, DTHOUR, or DTDAY, the default value of *daylength* is 24 hours. If the [INTERVAL=](#) option is specified as WORKDAY or

DTWRKDAY, the default value of *daylength* is 8 hours. For other values of the INTERVAL= option, the DAYLENGTH= option is ignored.

Note: The DAYLENGTH= option is needed to mark the non-worked periods within a day correctly (if the MARKBREAK option is in effect). The DAYLENGTH= option is also used to determine the start and end of a weekend precisely (to the nearest second). This accuracy is needed if you want to depict on a Gantt chart the exact time (for example, to within the nearest hour) for the start and finish of holidays or weekends. This option is used only if the times being plotted are SAS datetime values.

DAYSTART=*daystart*

specifies the start of the workday. The end of the day, *dayend*, is computed as *daylength* seconds after *daystart*. The value of *daystart* should be a SAS time value. This option is to be specified only when the value of the INTERVAL= option is one of the following: WORKDAY, DTSECOND, DTMINUTE, DTHOUR, DTDAY, or DTWRKDAY. For purposes of denoting on the Gantt chart, the weekend is assumed to start at *dayend* on Friday and end at *daystart* on Monday morning. Of course, if the SCALE= and MININTERVAL= values are such that the resolution is not very high, you will be unable to discern the start and end of holidays and weekends to the nearest hour. The default value of *daystart* is 9:00 a.m. if INTERVAL=WORKDAY or INTERVAL=DTWRKDAY, and midnight otherwise.

DUPOK

causes duplicate values of ID variables *not to be skipped*. As described later in the ID Statement section, if two or more consecutive observations have the same combination of values for all the ID variables, only the first of these observations is plotted. The DUPOK option overrides this behavior and causes *all* the observations to be plotted.

DURATION=*variable*

DUR=*variable*

identifies a variable in the *Schedule data set* that determines whether or not an activity is to be regarded as a milestone with respect to a specific schedule. This option is not required if the default variable name `_DUR_` is used. A value of 0 for this variable indicates that if the start and finish times of the activity with respect to a given schedule are identical (a schedule taken to mean early, late, actual, resource-constrained or baseline), then the activity is represented by a milestone with respect to the given schedule. A nonzero value treats identical start and finish times in the default manner by implicitly padding the finish times as specified by the PADDING= option. The milestone symbol is defined by the MILECHAR= option in line-printer and full-screen modes and by the CMILE= , FMILE= , HMILE= , and VMILE= options in graphics mode; these four options represent the color, font, height, and value of the symbol, respectively. See the descriptions of these options for their default values. To illustrate, suppose that the observations for activities **A** and **B** from the Schedule data set are as follows:

ACTIVITY	E_START	E_FINISH	A_START	A_FINISH	_DUR_
A	27JUL04	27JUL04	31JUL04	31JUL04	1
B	31JUL04	31JUL04	01AUG04	02AUG04	0

In this example, the actual schedule for activity **A** begins on ‘31JUL04’ and finishes at the end of the day, as explained in the “[Schedule Data Set](#)” section on page 489. PROC GANTT uses the `_DUR_` variable to recognize that activity **A** has nonzero duration, pads the finish time by a `PADDING=` unit, and displays a bar representing one day. In contrast, the value of ‘0’ for `_DUR_` in activity **A** alerts PROC GANTT that padding be ignored for any schedule with identical start and finish times. Consequently, the early schedule for activity **B** is represented on the chart by the milestone symbol at ‘31JUL04.’ The actual schedule, however, not having identical start and finish times, is padded as usual and plotted as starting on ‘01AUG04’ and finishing at the end of ‘02AUG04.’

E_FINISH=*variable*

EF=*variable*

specifies the variable containing the early finish time of each activity in the [Schedule data set](#). This option is not required if the default variable name `E_FINISH` is used.

E_START=*variable*

ES=*variable*

specifies the variable containing the early start time of each activity in the [Schedule data set](#). This option is not required if the default variable name `E_START` is used.

FILL

causes each page of the Gantt chart to be filled as completely as possible before a new page is started (when the size of the project requires the Gantt chart to be split across several pages). If the `FILL` option is not specified, the pages are constrained to contain an approximately equal number of activities. The `FILL` option is not valid in full-screen mode because all of the activities are plotted on one logical page.

HCONNECT

causes a line to be drawn for each activity from the left boundary of the chart to the beginning of the bar for the activity. This feature is particularly useful when the Gantt chart is drawn on a large page. In this case, the schedule bars for some of the activities may not start close enough to the left boundary of the chart; the connecting lines help to identify the activity associated with each bar.

HOLIDAY=*(variable)*

HOLIDAYS=*(variable)*

specifies the date or datetime variable in the [Holiday](#) data set that identifies holidays to be marked on the schedule. If there is no end time nor duration specified for the holiday, it is assumed to start at the time specified by the `HOLIDAY` variable and last one unit of *interval*, where *interval* is the value of the `INTERVAL=` option.

HOLIDUR=*(variable)*

HDURATION=*(variable)*

specifies the variable in the [Holiday](#) data set that identifies the durations of the holidays that are to be marked on the schedule.

HOLIFIN=*(variable)*

HOLIEND=*(variable)*

specifies the date or datetime variable in the [Holiday](#) data set that identifies the finish times of the holidays that are to be marked on the schedule.

IDPAGES

displays **ID** variables on every page. By default, the ID variables are displayed only on the first page.

INCREMENT=increment

specifies the number of *minintervals* between time axis labels on the Gantt chart. If the INCREMENT= option is not specified, a value is chosen that provides the maximum possible labeling.

INTERVAL=interval**HOLINTERVAL=interval**

specifies the units for the values of the HOLIDUR variables. Valid values for this option are DAY, WEEKDAY, WORKDAY, DTSECOND, DTMINUTE, DTHOUR, DTDAY, or DTWRKDAY. If the value for the INTERVAL= option has been specified as WEEKDAY, WORKDAY, or DTWRKDAY, weekends are also marked on the Gantt chart with the same symbol as holidays for line-printer quality charts. Graphics-quality Gantt charts use the same PATTERN statement as the one used for marking holidays. The default value of the INTERVAL= option is DAY if the times being plotted are SAS date values and is DTDAY if the times being plotted are SAS datetime values. See the “[Specifying the INTERVAL= Option](#)” section on page 496 for further information regarding this option.

L_FINISH=variable**LF=variable**

specifies the variable containing the late finish time of each activity in the [Schedule data set](#). This option is not required if the default variable name L_FINISH is used.

L_START=variable**LS=variable**

specifies the variable containing the late start time of each activity in the [Schedule data set](#). This option is not required if the default variable name L_START is used.

MARKBREAK

causes all breaks (non-worked periods) during a day to be marked on the Gantt chart. The symbol used for marking the breaks is the same as the [HOLICHAR=](#) symbol. This option may not be of much use unless the chart has been plotted with a scale that enables you to discern the different hours within a day on the Gantt chart. For instance, if the chart is in terms of days, there is no point in trying to show the breaks within a day; on the other hand, if it is in terms of hours or seconds, you may want to see the start and end of the various shifts within a day. This option turns on the [MARKWKND](#) option.

MARKWKND

causes all weekends (or non-worked days during a week) to be marked on the Gantt chart. The symbol used for marking weekends is the same as the [HOLICHAR=](#) symbol. Note that weekends are also marked on the chart if the value of the [INTERVAL=](#) option is WEEKDAY, WORKDAY, or DTWRKDAY.

MAXDATE=*maxdate*

specifies the end time for the time axis of the chart. The default value is the largest value of the times being plotted unless the logic options are invoked without the **NOEXTRANGE** option in the **CHART** statement. For a discussion of the default behavior in this instance, see the “[Formatting the Axis](#)” section on page 514.

MAXIDS

displays as many consecutive **ID** variables as possible in the presence of an **ID** statement. In the absence of this option, the default displays *all* of the variables or *none* if this is not possible.

MINDATE=*mindate*

specifies the starting time for the time axis of the chart. The default value is the smallest value of the times being plotted unless the logic options are invoked without the **NOEXTRANGE** option in the **CHART** statement. For a discussion of the default behavior in this instance, see the “[Formatting the Axis](#)” section on page 514.

MININTERVAL=*mininterval*

specifies the smallest interval to be identified on the chart. For example, if **MININTERVAL=DAY**, then one day is represented on the chart by *scale* (see the **SCALE=** option) number of columns. The default value of the **MININTERVAL=** option is chosen on the basis of the formats of the times being plotted, as explained in the “[Specifying the MININTERVAL= Option](#)” section on page 494. See also the “[Page Format](#)” section on page 493 for a further explanation of how to use the **MININTERVAL=** option in conjunction with the **SCALE=** option.

NOJOBNUM

suppresses displaying an identifying job number for each activity. By default, the job number is displayed to the left of the Gantt chart.

NOLEGEND

suppresses displaying the concise default legend at the bottom of each page of the Gantt chart. The **NOLEGEND** option is not effective in full-screen mode.

NOTNLABEL

suppresses displaying the timenow label. By default, the label is displayed on the bottom border of the chart.

PADDING=*padding***FINPAD=***padding*

requests that finish times on the chart be increased by one *padding* unit. An exception to this is when a milestone is to be plotted. See the **DUR=** option for further information regarding this. The **PADDING=** option enables the procedure to mark the finish times as the end of the last time period instead of the beginning. Possible values for *padding* are **NONE**, **SECOND**, **MINUTE**, **HOUR**, **DAY**, **WEEK**, **MONTH**, **QTR**, **YEAR**, **DTSECOND**, **DTMINUTE**, **DTHOUR**, **DTWEEK**, **DTMONTH**, **DTQTR**, or **DTYEAR**. The default value is chosen on the basis of the format of the times being plotted. See the “[Specifying the PADDING= Option](#)” section on page 492 for further explanation of this option.

PAGELIMIT=*pages*

PAGES=*pages*

specifies an upper limit on the number of pages allowed for the Gantt chart. The default value of *pages* is 100. This option is useful for preventing a voluminous amount of output from being generated by a wrong specification of the **MININTERVAL=** or **SCALE=** option. This option is ignored in full-screen mode.

REF=*values*

indicates the position of one or more vertical reference lines on the Gantt chart. The values allowed are constant values. Only those reference lines that fall within the scope of the chart are displayed.

In line-printer and full-screen modes, the reference lines are displayed using the character specified in the **REFCHAR=** option. In graphics mode, use the **CREF=**, **LREF=**, and **LWIDTH=** options to specify the color, style, and width of the reference lines.

REFLABEL

specifies that the reference lines are to be labeled. The labels are formatted in the same way as the time axis labels and are placed along the bottom border of the Gantt chart at the appropriate points. If the reference lines are too numerous and the scale does not allow all the labels to be nonoverlapping, then some of the labels are dropped.

S_FINISH=*variable*

SF=*variable*

specifies the variable containing the resource-constrained finish time of each activity in the **Schedule data set**. This option is not required if the default variable name **S_FINISH** is used.

S_START=*variable*

SS=*variable*

specifies the variable containing the resource-constrained start time of each activity in the **Schedule data set**. This option is not required if the default variable name **S_START** is used.

SCALE=*scale*

requests that *scale* number of columns on the chart represent one unit of *mininterval* where *mininterval* is the value of the **MININTERVAL=** option. In line-printer and graphics modes, the default value of the **SCALE=** option is 1 if the time axis of the chart is too wide to fit on one page. If the time axis fits on less than one page, then a default value is chosen that expands the time axis as much as possible but still fits the time axis on one page. In full-screen mode, the default value of the **SCALE=** option is always 1.

SKIP=*skip*

S=*skip*

requests that *skip* number of lines be skipped between the plots of the schedules of two activities. The **SKIP=** option can take integer values between 0 and 4, inclusive. In graphics mode, 0 is not a valid value. The default value of the **SKIP=** option is 1.

STRIPIDBLANKS**STRIPID**

strips all leading blanks from character **ID** variables. The default behavior is to preserve any leading blanks.

SUMMARY

requests that a detailed description of all symbols and patterns used in the Gantt chart be displayed before the first page of the chart. In line-printer mode, this description includes examples of some strings that could occur in the body of the Gantt chart. The **SUMMARY** option is not supported in full-screen mode.

TIMENOW=*value*

specifies the position for the timenow line on the chart. If the value is invalid or set to missing, **TIMENOW** is set to be the time period following the maximum of all specified actual times. If there are no actual times, **TIMENOW** is set to be equal to the current date. The value of **TIMENOW** is written to the log.

The timenow line has precedence over all other variables and reference lines and is drawn only if it falls within the range of the chart axis. If **TIMENOW** is based on the maximum of the actual times, and the **MAXDATE=** option is not specified, then the range of the chart axis is increased, if necessary, to display the timenow line. The timenow line is labeled by default; the label is formatted in the same way as the time axis and is placed along the bottom border of the chart. The timenow line is displayed in line-printer and full-screen modes using the character specified by the **TNCHAR=** option (or **T**, if none is specified) in the **CHART** statement. In graphics mode, use the **CTNOW=**, **LTNOW=**, and **WTNOW=** options in the **CHART** statement to specify the color, style, and width of the timenow line. In the presence of a timenow line, the actual schedule for an activity with an actual start less than **TIMENOW** and a missing actual finish time is represented on the Gantt chart by a bar that begins at the actual start and ends at **TIMENOW** to indicate that the activity is in progress at **TIMENOW**. This behavior is consistent with the convention used by **PROC CPM**. A warning is also issued to the log in this case.

USEFORMAT

specifies that the tickmark labels of the Gantt chart axis are to be displayed using the format associated with the first plot variable appearing in the order **E_START=**, **E_FINISH=**, **L_START=**, **L_FINISH=**, **A_START=**, **A_FINISH=**, **S_START=**, **S_FINISH=**, **B_START=**, **B_FINISH=**. This format is also used for labeling any reference lines and the timenow line.

Full-Screen and Line-Printer Options

The following options can appear in the **CHART** statement and are specifically for the purpose of producing Gantt charts in line-printer and full-screen modes.

FORMCHAR[*index list*]=*'string'*

defines the characters to be used for constructing the chart outlines and dividers. The value is a string 11 characters long defining the two bar characters, vertical and horizontal, and the nine corner characters: upper left, upper middle, upper right, middle left, middle middle (cross), middle right, lower left, lower middle, and lower right. The default value of the **FORMCHAR=** option is ' |---- | + | ---'. Any character

or hexadecimal string can be substituted to customize the chart appearance. Use an index list to specify which default form character each supplied character replaces, or replace the entire default string by specifying the full 11 character replacement string with no index list. For example, change the four corners to asterisks by using

```
formchar(3 5 9 11) = '****' .
```

Specifying the following produces charts with no outlines or dividers.

```
formchar= '          ' (11 blanks)
```

If you have your output routed to an IBM 6670 printer using an extended font (type-style 27 or 225) with input character set 216, it is recommended that you specify

```
formchar= 'FABFACCCBCEB8FECABCBBB' X .
```

If you are using a printer with a TN (text) print train, it is recommended that you specify the following:

```
formchar= '4FBFACBFBC4F8F4FABBFBB' X .
```

HCONCHAR= '*character*'

specifies the symbol to be used for drawing the connecting line described in the [HCONNECT](#) option. The default character is `-`. This is a line-printer option and is not valid in conjunction with the [GRAPHICS](#) option. For corresponding graphics options, see the [LHCON=](#) and [CHCON=](#) options described later in this section under “Graphics Options.”

HOLICHAR= '*character*'

indicates the character to display for holidays. Note that `PROC GANTT` displays only those holidays that fall within the duration or the slack time of an activity. The default character used for representing holidays is `!`.

JOINCHAR= '*string*'

defines a string eight characters long that identifies nonblank characters to be used for drawing the schedule. The first two symbols are used to plot the schedule of an activity with positive total float. The first symbol denotes the duration of such an activity while the second symbol denotes the slack present in the activity's schedule. The third symbol is used to plot the duration of a *critical* activity (with zero total float). The next two symbols are used to plot the schedule of a *supercritical* activity (one with negative float). Thus, the fourth symbol is used to plot the negative slack of such an activity starting from the late start time (to early start time), and the fifth symbol is used to plot the duration of the activity (from early start to early finish). The sixth symbol is used to plot the actual schedule of an activity if the `A_START` and `A_FINISH` variables are specified. The seventh symbol is used to plot the resource-constrained schedule of an activity if the `S_START` and `S_FINISH` variables are

specified. The eighth symbol is used to plot the baseline schedule of an activity if the B_START and B_FINISH variables are specified. The default value of the JOINCHAR= option is '-.-*-*_ '.

MILECHAR= *'character'*

indicates the character to display for the milestone symbol. If this option is not used, the letter **M+** is used. In the event that another milestone or a character representing a start or finish time is to be plotted in this column, the **OVERLAPCH=** character is used.

OVERLAPCH= *'character'*

OVLPCCHAR= *'character'*

indicates the overprint character to be displayed when more than one of the symbols in **SYMCHAR=** *'string'* or **MILECHAR=** *'character'* are to be plotted in the same column. The default character is *****.

OVPCHAR= *'character'*

indicates the character to be displayed if one of the variables specified in the **CHART** statement is to be plotted in the same column as one of the start or finish times. If no **OVPCHAR=** option is given, the 'at' symbol (@) is used. Note that if one of the E_START, E_FINISH, L_START, L_FINISH, A_START, A_FINISH, S_START, S_FINISH, B_START, or B_FINISH times coincides with another, the overprint character to be displayed can be specified separately using the **OVERLAPCH=** option.

REFCHAR= *'character'*

indicates the character to display for reference lines. If no **REFCHAR=** option is given, the vertical bar (|) is used. If a time variable value is to be displayed in the column where a **REF=** value goes, the plotting symbol for the time variable is displayed instead of the **REFCHAR=** value. Similarly, the **HOLICHAR=** symbol has precedence over the **REFCHAR=** value.

SYMCHAR= *'string'*

defines the symbols to be used for plotting the early start, late start, early finish, late finish, actual start and finish, resource-constrained start and finish, and baseline start and finish times, in that order. The default value is '**<<>>**<> []**'. If any of the preceding symbols coincide with one another or with the milestone symbol, the symbol plotted is the one specified in the **OVERLAPCH=** option (or *****, if none is specified). If the actual, resource-constrained, and baseline schedules are not plotted on the chart, you can specify only the first four symbols. If fewer than the required number of symbols are specified, nonspecified symbols are obtained from the default string.

TNCHAR= *'character'*

indicates the character to display for the timenow line. If this option is not used, the letter **T** is used.

Graphics Options

The following describes the interpretation of the CHART specification in graphics mode. Note that the GANTT procedure is not supported with the ActiveX or Java series of devices on the GOPTIONS statement.

As before, the CHART statement controls the format of the Gantt chart and specifies additional variables (other than the early, late, actual, resource-constrained, and baseline start and finish times) to be plotted on the chart. The same forms for the specification of CHART variables (as in the line-printer and full-screen version) are allowed, although the interpretation is somewhat different. Each form of specification is repeated here with a corresponding description of the interpretation. Note that the symbols for any activity are plotted on a line above the one corresponding to that activity. In addition to plotting the required symbol, PROC GANTT draws a vertical line below the symbol in the same color as the symbol. The length of the line is the same as the height of the bars (referred to as bar height) that represent the durations of the activities on the Gantt chart. This line helps identify the exact position of the plotted value. See also the “[Special Fonts for Project Management and Decision Analysis](#)” section on page 509 for information on a special set of symbols that are suitable for representing CHART variables on a Gantt chart.

variable1 . . . variablen

indicates that each variable is to be plotted using symbols specified in SYMBOL statements. The *i*th variable in the list is plotted using the plot symbol, color, and font specified in the *i*th SYMBOL statement. The height specified in the SYMBOL statement is multiplied by the bar height to obtain the height of the symbol that is plotted. Thus, if **H=0.5** in the first SYMBOL statement, and the bar height is 5% of the screen area, then the first symbol is plotted with a height of 2.5%. For example, suppose the following two SYMBOL statements are in effect:

```
SYMBOL1 V=STAR C=RED H=1;
SYMBOL2 V=V C=GREEN H=0.5 F=GREEK;
```

Then, the following statement

```
CHART SDATE FDATE;
```

causes values of SDATE to be plotted with a red star that is as high as each bar and the values of FDATE with an inverted green triangle that is half as high as the bar height. See the “[Using SYMBOL Statements](#)” section on page 506 for further information on using the SYMBOL statement.

variable1='symbol1' . . . variablen='symboln'

indicates that each variable is to be plotted using the symbol specified. The symbol must be a single character enclosed in quotes. The font used for the symbol is the same as the font used for the text.

(variables)='symbol1' . . . (variables)='symboln'

indicates that each variable in parentheses is to be plotted using the symbol associated

with that group. The symbol must be a single character enclosed in single quotes. For example, the following statement

```
CHART (ED SD)='*'
      (FD LD)='+' ;
```

plots the values of variables in the first group using an asterisk (*) and the values of variables in the second group using a plus sign (+).

A single **CHART** statement can contain requests in more than one of these forms.

Note: It is not necessary to specify a **CHART** statement if only default values are used to draw the Gantt chart.

The following options can appear in the **CHART** statement specifically for the production of high-resolution graphics quality Gantt charts.

ABARHT=*h*

specifies that the height of the actual schedule bar be *h* cellheights. The value of *h* is restricted to be a positive real number. The default bar height is one cellheight. This specification will override a **BARHT=** specification. In the event that the actual schedule bar corresponds to the logic bar (using the **LEVEL=** option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are also drawn using the same height as the schedule bar unless the **HBARHT=** option is specified.

ABAROFF=*d*

specifies that the actual schedule bar be offset *d* cellheights from its default position. A value of zero corresponds to the default position. The direction of increase is from top to bottom. This specification will override a **BAROFF=** specification. In the event that the actual schedule bar corresponds to the logic bar (specified using the **LEVEL=** option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are drawn using the offset of the schedule bar unless the **HBAROFF=** option is specified.

ACTIVITY=*variable*

ACT=*variable*

specifies the variable identifying the names of the nodes representing activities in the Schedule data set. This option is required when the precedence information is specified using the AON format. The variable can be either numeric or character in type. If the **PRECDATA=** option is specified, then this variable must also exist in the Precedence data set and have identical type and length.

ANNOTATE=*SAS-data-set*

ANNO=*SAS-data-set*

specifies the input data set that contains the appropriate Annotate variables for the purpose of adding text and graphics to the Gantt chart. The data set specified must be an Annotate-type data set. See also the “Annotate Processing” section on page 502 for information specifically on annotate processing with the GANTT procedure.

The **ANNOTATE=** data set specified in a **CHART** statement is used only for the Gantt chart created by that particular **CHART** statement. You can also specify an

ANNOTATE= data set in the [PROC GANTT statement](#), which provides “global” Annotate information to be used for all Gantt charts created by the procedure.

AOA

causes PROC GANTT to use the specification for the AOA format for producing a [Logic Gantt chart](#) when the precedence information has been specified in both AOA format ([TAIL=](#) and [HEAD=](#) options) and AON format ([ACTIVITY=](#), [SUCCESSOR=](#), and, optionally, [LAG=](#) options). The default behavior is to use the AON format.

BARHT=*h*

specifies that the height of all the schedule bars be *h* cellheights. The value of *h* is restricted to be a positive real number. The default value is one cellheight. This specification can be overridden for each schedule type by specifying the bar height option appropriate for that schedule type. If a Logic Gantt chart is produced, the specified bar height is ignored for the logic bar (specified using the [LEVEL=](#) option) and the default bar height of one cellheight is used for it instead. All non-working days corresponding to a schedule bar are drawn using the height of the schedule bar unless the [HBARHT=](#) option is specified.

BAROFF=*d*

specifies that all the schedule bars be offset *d* cellheights from their default positions. A value of zero corresponds to the default positions. The direction of increase is from top to bottom. This specification can be overridden for each schedule type by specifying the bar offset option that is appropriate for that schedule type. If a Logic Gantt chart is produced, the specified bar offset is ignored for the logic bar (specified using the [LEVEL=](#) option) and the default bar offset of zero used instead.

BBARHT=*h*

specifies that the height of the baseline schedule bar be *h* cellheights. The value of *h* is restricted to be a positive real number. The default bar height is one cellheight. This specification overrides a [BARHT=](#) specification. In the event that the baseline schedule bar corresponds to the logic bar (using the [LEVEL=](#) option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are also drawn using the same height as the schedule bar unless the [HBBARHT=](#) option is specified.

BBAROFF=*d*

specifies that the baseline schedule bar be offset *d* cellheights from its default position. A value of zero corresponds to the default position. The direction of increase is from top to bottom. This specification overrides a [BAROFF=](#) specification. In the event that the baseline schedule bar corresponds to the logic bar (specified using the [LEVEL=](#) option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are drawn using the offset of the schedule bar unless the [HBBAROFF=](#) option is specified.

BOTTOM

BJUST

positions the bottom of the Gantt chart at the bottom of the page, just above the footnotes. This option is ignored if you specify the [TOP](#) or [TJUST](#) option.

CAXIS=*color***CAXES=***color***CA=***color*

specifies the color to use for displaying axes for the Gantt chart. If the CAXIS= option is omitted, PROC GANTT uses the first color in the COLORS= list in the GOPTIONS statement.

CFRAME=*color***CFR=***color*

specifies the color to use for filling the axis area. By default, the axis is not filled. This option is ignored if the **NOFRAME** option is specified.

CHARTWIDTH=*p***CHARTPCT=***p*

specifies the width of the axis area as a percentage of the total Gantt chart width in the chart that would be produced if you had a page large enough to contain the entire chart without compression. The Gantt procedure rescales the chart so the axis area with is *p*% of the virtual chart width and the text area width is (100-*p*)% of the virtual chart width.

This option gives you the capability to generate Gantt charts that are consistent in their appearance. In the event that the chart fits on a single page, it is possible to get a smaller chart than had the CHARTWIDTH= option not been specified. You can use the **FILL** option in this case if you wish to use the entire page.

CHCON=*color*

specifies the color to use for drawing the horizontal connecting lines. If the CHCON= option is not specified, PROC GANTT uses the first color in the COLORS= list in the GOPTIONS statement.

CMILE=*color*

specifies the color to use for drawing the milestone symbol on the chart. If the CMILE= option is not specified, the default color of the milestones follows the rules for coloring the bars of the relevant schedule. For example, the milestone depicting a critical activity is drawn with the color of the fill pattern used for critical activities. For an activity with slack, the early start and late start milestone are drawn with the color of the fill pattern used for the duration and the slack time of a noncritical activity, respectively. You can also control the color at the activity level by using a **PATTERN** variable.

COMPRESS

specifies that the Gantt chart be drawn on the number of output pages determined by the **HPAGES=** and **VPAGES=** options. If the HPAGES= option is not specified, the procedure assumes a default of HPAGES=1. If the VPAGES= option is not specified, the procedure assumes a default of VPAGES=1. The COMPRESS option does not attempt to maintain the aspect ratio of the Gantt chart. To maintain the aspect ratio of the Gantt chart, use the **PCOMPRESS** option instead.

CPREC=*color*

specifies the color to use for drawing the precedence connections. If the CPREC= option is not specified, PROC GANTT uses the first color in the COLORS= list in the GOPTIONS statement.

CREF=*color*

specifies the color to use for drawing vertical reference lines on the chart. If the CREF= option is not specified, PROC GANTT uses the first color in the COLORS= list in the GOPTIONS statement.

CTEXT=*color***CT=***color*

specifies the color to use for displaying text that appears on the chart, including variable names or labels, tickmark values, values of ID variables, and so on. The default color is the value specified for the CTEXT= option in the GOPTIONS statement. If CTEXT= is not specified in the GOPTIONS statement, PROC GANTT uses the first color in the COLORS= list in the GOPTIONS statement.

CTEXTCOLS=*name***CTEXTCOLS=***(namelist)***CPATTEXT=***name***CPATTEXT=***(namelist)***CACTTEXT=***name***CACTTEXT=***(namelist)*

names the columns of activity text to be displayed using the color of the PATTERN variable when one exists or from the fill pattern from a particular schedule bar.

A missing value for a PATTERN variable results in the default text color being used. The default text color is the value of the CTEXT= option.

In the absence of a PATTERN variable, the activity text color is the color of the fill pattern indicating the duration of the schedule identified by the PATLEVEL= option. If PATLEVEL=EARLY or PATLEVEL=LATE, the color depends on the status of the activity. Colors for critical duration, supercritical duration, and normal duration are used depending on whether the activity is critical, supercritical, or noncritical, respectively. If more than one level is specified, the first in order of appearance on the Gantt chart is used, that is, in order EARLY, LATE, ACTUAL, RESOURCE, BASELINE.

Possible values for the CTEXTCOLS= option are shown in the following table.

Value	Interpretation
ZONE	ZONE variable column
JOBNUM	Job number column
ID	ID variable columns
FLAG	Status flag column
ALL	All of the above (default)

CTNOW=*color*

specifies the color to use for drawing the timenow line on the chart. If the CTNOW= option is not specified, PROC GANTT uses the first color in the COLORS= list of the GOPTIONS statement.

CZONE=*color***CZLINE=***color*

specifies the color to use for drawing the horizontal zone lines that demarcate the different zones on the chart. If the CZONE= option is not specified, the GANTT procedure uses the first color in the COLORS= list in the GOPTIONS statement.

DESCRIPTION=*'string'***DES=***'string'*

specifies a descriptive string, up to 40 characters in length, that appears in the description field of the master menu of PROC GREPLAY. If the DESCRIPTION= option is omitted, the description field contains a description assigned by PROC GANTT.

EBARHT=*h***LBARHT=***h*

specifies that the height of the early/late schedule bar be *h* cellheights. The value of *h* is restricted to be a positive real number. The default bar height is one cellheight. This specification overrides a **BARHT=** specification. In the event that the early/late schedule bar corresponds to the logic bar (using the **LEVEL=** option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are also drawn using the same height as the schedule bar unless the **HBARHT=** option is specified.

EBAROFF=*d***LBAROFF=***d*

specifies that the early/late schedule bar be offset *d* cellheights from its default position. A value of zero corresponds to the default position. The direction of increase is from top to bottom. This specification overrides a **BAROFF=** specification. In the event that the early/late schedule bar corresponds to the logic bar (specified using the **LEVEL=** option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are drawn using the offset of the schedule bar unless the **HBAROFF=** option is specified.

FONT=*font*

specifies the font to use for displaying job numbers, ID variables, legend, labels on the time axis, and so forth. The default font is the value specified for the **FTEXT=** option in the GOPTIONS statement. If **FTEXT=** is not specified in the GOPTIONS statement, the hardware character set for your device is used to display the text.

FMILE=*font*

specifies the font to use for drawing the milestone symbol on the chart. To select a symbol from the special symbol table, set **FMILE=NONE** or leave it unspecified. If the **FMILE=** option is specified without a corresponding **VMILE=** option, the value of the **FMILE=** option is ignored, and the default milestone symbol, a filled diamond, is used instead. A warning is issued to the log in this instance.

See also the “[Special Fonts for Project Management and Decision Analysis](#)” section on page 509 for information on a special set of symbols that are suitable for representing milestones on a Gantt chart.

HBARHT=*h*

specifies that all non-working days be displayed with a bar which is *h* cellheights

high. The default behavior is to use the same height as that of the schedule bar.

HBAROFF=*d*

specifies that the bars which represent non-working days be offset *d* cellheights from their default positions. The default behavior is to use the same offset as that of the schedule bar.

HEAD=*variable*

HEADNODE=*variable*

specifies the variable (either character or numeric) in the [Schedule](#) data set that contains the name of the node that represents the finish of the activity. This option is required when the precedence information is specified using the [AOA](#) format.

HEIGHT=*h*

specifies that the height for all text in PROC GANTT, excluding TITLE and FOOTNOTE statements, be *h* times the value of HTEXT=, the default text height specified in the GOPTIONS statement of SAS/GRAPH. The value of *h* is a positive real number; the default value is 1.0.

To illustrate, suppose you have the specification HEIGHT=0.6 in the [CHART](#) statement and the following GOPTIONS statement:

```
GOPTIONS htext = 2 in;
```

Then the height for all text in PROC GANTT is $0.6 \times 2 \text{ in} = 1.2 \text{ in}$.

For each activity, all text corresponding to the JOB, FLAG, and ID variables is displayed at a depth of *d* cells from the top of the first bar corresponding to the activity, where *d* is the value of the [HTOFF=](#) option. The default value of *d* is 1.0. Furthermore, the text strings do not overwrite one another and *skip*, the value of the [SKIP=](#) option, is not increased to accommodate a large text height. Subject to the preceding restrictions, PROC GANTT calculates the maximum allowable value for text height as the height occupied by (*skip* + the number of different schedule bars drawn per activity) blank lines. Specifically, this is the height between like bars corresponding to consecutive activities. If the specified text height exceeds this value, the height is truncated to the maximum allowable value and a warning is issued to the log. This option enables you to enlarge the text to at least the height occupied by all of the schedule bars, making it easier to read. This is especially useful when the value of the VPOS= option is very large, and several schedule bars are plotted for each activity. It also provides easier identification of the activity corresponding to a given schedule bar.

HMILE=*height*

specifies the height in cells of the milestone symbol. The height is a positive real number; the default value is 1.0.

HPAGES=*h*

specifies that the Gantt chart is to be produced using *h* horizontal pages. This, however, may not be possible due to intrinsic constraints on the output. For example, the GANTT procedure requires that every horizontal page represent at least one activity. Thus, the number of horizontal pages can never exceed the number of activities in

the project. Subject to such inherent constraints, the GANTT procedure attempts to use the specified value for the HPAGES= option; if this fails, it uses *h* as an upper bound. The exact number of horizontal pages used by the Gantt chart is given in the `_ORGANTT` macro variable. See the “Macro Variable `_ORGANTT`” section on page 528 for further details.

The appearance of the chart with respect to the HPAGES= option is also influenced by the presence of other related procedure options. The HPAGES= option performs the task of determining the number of vertical pages in the absence of the VPAGES= option. If the COMPRESS or PCOMPRESS option is specified in this scenario, the chart uses one vertical page; if neither option is specified, the number of vertical pages is computed to display as much of the chart as possible in a proportional manner.

HTOFF=*d*

specifies that the line upon which all activity text rests, also referred to as the *font baseline*, is positioned at a depth of *d* cells below the top of the first bar. The default value of *d* is 1.0. The value of the HTOFF= option can be any nonnegative real number less than the (*skip + the number of different schedule bars per activity - 1*). A value of 0 positions text on the line corresponding to the top of the first bar. Assigning the maximum value corresponds to positioning text directly above the bar reserved for CHART variables of the next activity on the page. If a value larger than the maximum is specified, PROC GANTT truncates this value to the maximum and issues a warning to the log. Furthermore, if the HEIGHT= and HTOFF= values cause activity text to overwrite the text headings, PROC GANTT reduces the HTOFF= value accordingly and issues a warning to the log.

LABVAR=*variable*

specifies the variable that links observations in the Label data set (label definitions) to observations in the Schedule data set (activities). This variable must exist in both the Schedule data set and the Label data set and be identical in type and length. The variable can be either numeric or character in type. The linking can be a 1-1, 1-many, many-1, or many-many relationship. The linking can be used to extract positional information as well as the text string information from the Schedule data set for an observation in the Label data set when such information cannot be retrieved from the relevant variables in the Label data set.

If the `_Y` variable does not exist or its value is missing, the vertical coordinate for a label's placement position is determined from the activities that are linked to it and their relative positions on the activity axis of the Gantt chart. A value of -1 for `_Y` implies linking of the label to every activity (assuming data values are used). This is equivalent to specifying the LABVAR= option in the CHART statement and linking every activity to the label. Note that any Label data set observation with dual linkage definitions is ignored. That is, an observation with `_Y` equal to -1 and with a nonmissing value for the LABVAR= variable is ignored.

The following rules apply to label definitions in the Label data set that are linked to activities in the Schedule data set:

- If the `_X` variable does not exist in the Label data set or its value is missing, the horizontal coordinate is extracted from the Schedule data set using the `_XVAR`

variable.

- If the `_LABEL` variable does not exist in the Label data set or its value is missing, the text string is determined from the Schedule data set using the `_LVAR` variable.

LABRULE=*rule*

LABFMT=*rule*

specifies the rule to use for laying out labels that are defined in the Label data set. Valid values for *rule* are PAGECLIP and FRAMCLIP. PAGECLIP displays a label at the specified location and clips any part of the label that runs off the page. A value of FRAMCLIP differs from PAGECLIP in that it clips all labels with data value coordinates that run off the frame of the Gantt chart. The default value for *rule* is PAGECLIP.

LABSPLIT='*character*'

LABELSPLIT='*character*'

splits labels that are defined in the Label data set wherever the split character appears. By default, if there are embedded blanks, the GANTT procedure attempts to split strings at suitable blanks so that the resulting lines are equal in length. To suppress the default splitting when using strings embedded with blanks, specify a dummy character not used in the labeling.

LAG=*variable*

LAG=(*variables***)**

specifies the variables identifying the lag types of the precedence relationships between an activity and its successors. Each **SUCCESSOR** variable is matched with the corresponding LAG variable; that is, for a given observation, the *i*th LAG variable defines the relationship between the activities specified by the **ACTIVITY** variable and the *i*th **SUCCESSOR** variable. The LAG variables must be character type and their values are expected to be specified as one of FS, SS, SF, FF, which denote 'Finish-to-Start', 'Start-to-Start', 'Start-to-Finish', 'Finish-to-Finish', respectively. You can also use the *keyword_duration_calendar* specification used by **PROC CPM** although **PROC GANTT** uses only the *keyword* information and ignores the lag *duration* and the lag *calendar*. If no LAG variables exist or if an unrecognized value is specified for a LAG variable, **PROC GANTT** interprets the lag as a 'Finish-to-Start' type. If the **PRECDATA=** option is specified, the LAG variables are assumed to exist in the Precedence data set; otherwise, they are assumed to exist in the Schedule data set.

LEFT

LJUST

displays the Gantt chart left-justified with the left edge of the page. This option has priority over the **RIGHT** or **RJUST** option. Note that when displaying a Gantt chart in graphics mode, the chart is centered in both horizontal and vertical directions in the space available after accounting for titles, footnotes, and notes. The chart justification feature enables you to justify the chart in the horizontal and vertical directions with the page boundaries.

LEVEL=*number*

specifies the schedule bar to use for drawing the precedence connections. The default

value of LEVEL= is 1, which corresponds to the topmost bar.

LHCON=linetype

specifies the line style (1 – 46) to be used for drawing the horizontal connecting line produced by the **HCONNECT** option described earlier in this section. Possible values for *linetype* are

- 1 solid line (the default value when LHCON= is omitted)
- 2 – 46 various dashed lines. See [Figure 6.5](#).

For the corresponding line-printer option, see the **HCONCHAR=** option described earlier in this section.

LPREC=linetype

specifies the line style (1 – 46) to use for drawing the precedence connections. The default line style is 1, a solid line. See [Figure 6.5](#) for examples of the various line styles available.

LREF=linetype

specifies the line style (1 – 46) to use for drawing the reference lines. The default line style is 1, a solid line. See [Figure 6.5](#) for examples of the various line styles available. For the corresponding line-printer option, see the **REFCHAR=** option described earlier.

LTNOW=linetype

specifies the line style (1 – 46) to use for drawing the timenow line. The default line style is 1, a solid line. See [Figure 6.5](#) for examples of the various line styles available.

LWIDTH=linewidth

specifies the line width to be used for drawing lines, other than the timenow line and precedence connection lines, used in the Gantt chart. The default width is 1.

LZONE=linetype**LZLINE=linetype**

specifies the line style (1 – 46) to use for drawing the horizontal zone lines which demarcate the different zones on the chart. The default line style is 1, a solid line.

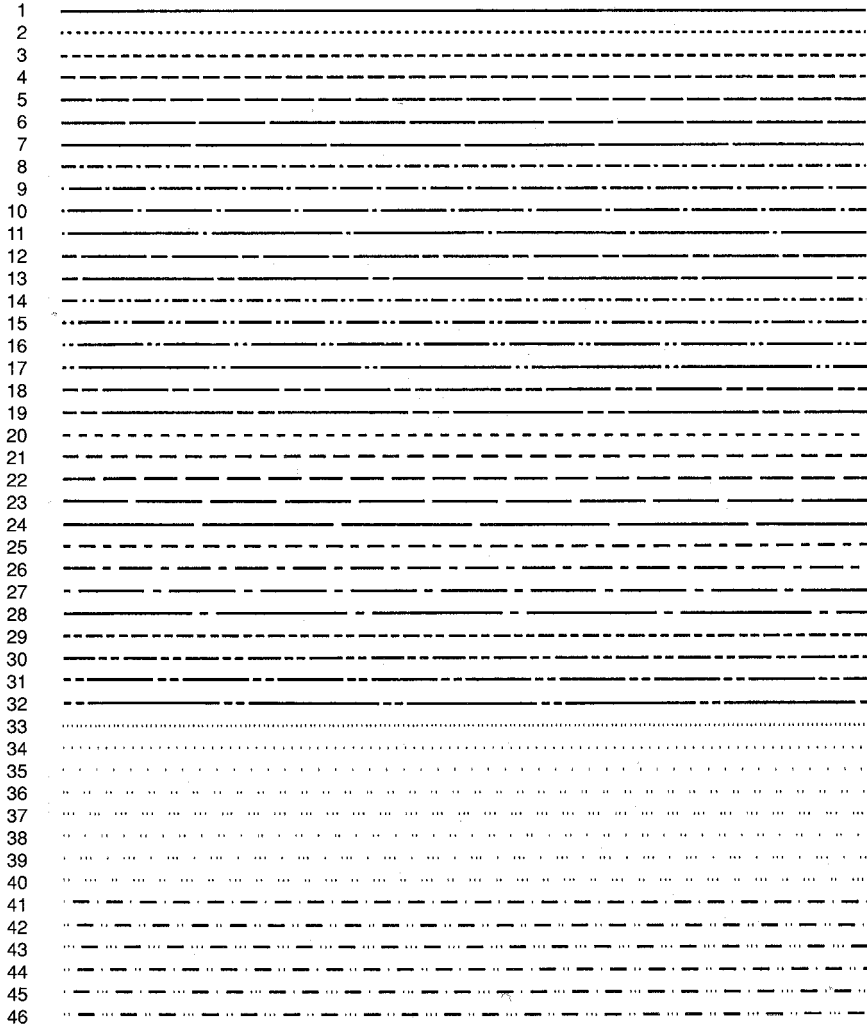


Figure 6.5. Valid Line Styles

MAXDISLV=columns

specifies the maximum allowable distance, in number of columns, that a local vertical can be positioned from its minimum offset to avoid overlap with a global vertical. The value of the MAXDISLV= option must be greater than or equal to 0.1; the default value is 1. For the definitions of global and local verticals, see the “Specifying the Logic Options” section on page 511.

MININTGV=columns

specifies the minimum inter-distance, in number of columns, of any two global verticals to prevent overlap. The value of the MININTGV= option must be greater than or equal to 0.1; the default value is 0.75.

MINOFFGV=columns

specifies the minimum offset, in number of columns, of a global vertical from the end of the bar with which it is associated. The value of the MINOFFGV= option must be greater than or equal to 0.1; the default value is 1.

MINOFFLV=columns

specifies the minimum offset, in number of columns, of a local vertical from the end of the bar with which it is associated. The value of the MINOFFLV= option must be greater than or equal to 0.1; the default value is 1.

NAME='string'

where *'string'* specifies a descriptive string, up to eight characters long, that appears in the name field of the master menu of the GREPLAY procedure. If you omit the NAME= option, the name field of the master menu contains the name of the procedure.

NJOBS=number**NACTS=number**

specifies the number of jobs that should be displayed on a single page. This option overrides the [VPAGES=](#) option.

NOARROWHEAD**NOARRHD**

suppresses the arrowhead when drawing the precedence connections.

NOEXTRANGE**NOXTRNG**

suppresses the automatic extension of the chart axis range when drawing a Logic Gantt chart and neither the [MINDATE=](#) nor [MAXDATE=](#) option is specified.

NOFRAME**NOFR**

suppresses drawing the vertical boundaries to the left and right of the Gantt chart; only the top axis and a parallel line at the bottom are drawn. If this option is not specified, the entire chart area is framed.

NOPAGENUM

suppresses numbering the pages of a multipage Gantt chart. This is the default behavior. To number the pages of a multipage Gantt chart on the upper right-hand corner of each page, use the [PAGENUM](#) option.

NOPATBAR

suppresses the use of the [PATTERN](#) variable for filling the schedule bars. The default fill patterns are used instead. Typically, this option is used when you want to color the activity text using the [CTEXTCOLS=](#) option but leave the bars unaffected by the PATTERN variable.

NOTMTIME

suppresses the display of the time portion of the axis tickmark label when the value of [MININTERVAL](#) is DTDAY. When MININTERVAL=DTDAY, the time axis tickmarks are labeled with three lines, the first indicating the month, the second indicating the day, and the third indicating the time. This option effectively lowers the first two lines by a line and drops the third line altogether.

NOZONECOL

suppresses displaying the [ZONE](#) variable column that is automatically done in the presence of a zone variable.

NTICKS=number

NINCRS=number

specifies the number of tickmarks that should be displayed on the first horizontal page of the Gantt chart. The number of tickmarks on the remaining horizontal pages is determined by the page width and the columns of text that are to be displayed (ZONE, IDs, flag, and so forth). The page width is determined to be the minimum width necessary to fit the first page. If the **IDPAGES** option is specified, the number of tickmarks is the same as that specified by the **NTICKS=** option. This option overrides the **HPAGES=** option.

ONEZONEVAL

displays the value of the **ZONE** variable in the **ZONE** variable column only for activities that begin a new zone. A blank string is displayed for all other activities.

PAGENUM

numbers the pages of the Gantt chart on the top right-hand corner of the page if the chart exceeds one page. The numbering scheme is from left to right, top to bottom.

PATLEVEL=name

PATLEVEL=(namelist)

specifies the different schedule bar levels to fill using the pattern variable. By default, all of the schedule bar levels for an activity are filled using the pattern defined by the **PATTERN** variable. Note that holiday and non-working days are not filled with this pattern.

Possible values for the **PATLEVEL=** option and their actions are shown in the following table.

Value	Interpretation
EARLY	Early/Late schedule durations
LATE	Early/Late schedule durations
ACTUAL	Actual schedule durations
RESOURCE	Resource schedule duration
BASELINE	Baseline schedule duration
ALL	All of the above (default)

In the absence of a **PATTERN** variable, this option defines the schedule type that determines the color for the activity text columns (**ZONE** variable, **ID** variable, Job number, Critical Flag), which are identified with the **CTEXTCOLS=** option. In this case, only one schedule type is used, namely the first one appearing in the order **EARLY, LATE, ACTUAL, RESOURCE, BASELINE**.

PATTERN=variable

PATVAR=variable

specifies an integer variable in the Schedule data set that identifies the pattern for filling the schedule bars and coloring the milestones. The default **PATTERN** variable name is **_PATTERN**. If the value of the **PATTERN** variable is missing for a particular activity, or if there is no **PATTERN** variable, the different schedule bars and

milestones for the activity are drawn using the corresponding default patterns given in Table 6.24. The procedure uses the defined or default pattern to fill all the schedule bars and color all the milestones associated with the activity, except for holidays and non-working days. Use the `PATLEVEL=` option to restrict the application of the defined pattern to selected schedule bar levels.

When plotting split activities, you have the additional capability of overriding the defined pattern at the segment level by specifying a value for the `PATTERN` variable for the schedule data set observation representing the segment. Setting it to missing results in inheriting the `PATTERN` variable value from the observation for the same activity with a missing `SEGMT_NO`. For example, setting `PATTERN=SEGMT_NO` in the `CHART` statement when using split activities results in each segment using a different pattern.

Note that, if the value of the `PATTERN` variable is n for a particular activity, the GANTT procedure uses the specifications in the n th generated `PATTERN` definition, not the specifications in the `PATTERN n statement`.

The chart legend and summary, when displayed, indicate the default patterns that identify the different schedule types represented on the Gantt chart as listed in Table 6.24. Since the `PATTERN` variable overrides these values at the activity level, you must be careful in interpreting the summary and legend when using a `PATTERN` variable, especially if any of the specified pattern definitions overlap with one of the default patterns.

PCOMPRESS

specifies that every output page of the Gantt chart is to be produced maintaining the original aspect ratio of the Gantt chart. The number of output pages is determined by the `HPAGES=` and `VPAGES=` options. In the absence of the `HPAGES=` and `VPAGES=` options, the `PCOMPRESS` option displays the Gantt chart on a single page.

RBARHT= h

SBARHT= h

specifies that the height of the resource-constrained schedule bar be h cellheights. The value of h is restricted to be a positive real number. The default bar height is one cellheight. This specification overrides a `BARHT=` specification. In the event that the resource-constrained schedule bar corresponds to the logic bar (using the `LEVEL=` option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are also drawn using the same height as the schedule bar unless the `HBARHT=` option is specified.

RBAROFF= d

SBAROFF= d

specifies that the resource-constrained schedule bar be offset d cellheights from its default position. A value of zero corresponds to the default position. The direction of increase is from top to bottom. This specification overrides a `BAROFF=` specification. In the event that the resource-constrained schedule bar corresponds to the logic bar (specified using the `LEVEL=` option), the value is ignored and the default value is used instead. Any non-working days corresponding to this schedule bar are drawn

using the offset of the schedule bar unless the **HBAROFF=** option is specified.

RIGHT

RJUST

displays the Gantt chart right-justified with the right edge of the page. This option is ignored in the presence of the **LEFT** or **LJUST** option.

SHOWPREC

causes PROC GANTT to terminate in the event that a valid **AOA** or **AON** specification exists, and an error occurs either in the logic system (memory allocation, data structure creation, and so on) or simply due to bad data (missing values for the **ACTIVITY**, **TAIL**, **HEAD** variables, and so on). The default behavior is to attempt drawing the chart without the precedence connections.

SUCCESSOR=*variable*

SUCC=*variable*

SUCCESSOR=(*variables*)

SUCC=(*variables*)

specifies the variables identifying the names of the immediate successors of the node specified by the **ACTIVITY** variable. This option is required when the precedence information is specified in the **AON** format. These variables must have the same type as the **ACTIVITY** variable. If the **PRECDATA=** option has been specified, the **SUCCESSOR** variables are assumed to exist in the **Precedence** data set; otherwise, they are assumed to exist in the **Schedule** data set.

TAIL=*variable*

TAILNODE=*variable*

specifies the variable in the **Schedule** data set that contains the name of the node that represents the start of the activity. This option is required when the precedence information is specified using the **AOA** format. The variable can be either numeric or character in type.

TOP

TJUST

positions the top of the Gantt chart at the top of the page, just below the titles. This option has priority over the **BOTTOM** or **BJUST** option.

VMILE=*value*

specifies a plot symbol from the font specified in the **FMILE=** option to be used as the milestone symbol on the chart. If the **FMILE=** option is set to **NONE** or is not specified, then the milestone symbol is the symbol specified by the **VMILE=** option in the special symbol table shown in [Table 6.25](#). The default milestone symbol is a filled diamond.

VPAGES=*v*

Specifies that the Gantt chart is to be produced using *v* vertical pages. This, however, may not be possible due to intrinsic constraints on the output. For example, the GANTT procedure requires that every vertical page represent at least one tickmark. Thus, the number of vertical pages can never exceed the number of tickmarks in the axis. Subject to such inherent constraints, the GANTT procedure attempts to use the specified value for the **VPAGES=** option; if this fails, it uses *v* as an upper

bound. The exact number of vertical pages used by the Gantt chart is provided in the `_ORGANTT` macro variable. See the “[Macro Variable _ORGANTT](#)” section on page 528 for further details.

The appearance of the chart with respect to the `VPAGES=` option is also influenced by the presence of other related procedure options. The `VPAGES=` option performs the task of determining the number of horizontal pages in the absence of the `HPAGES=` option. If the `COMPRESS` or `PCOMPRESS` option is specified in this scenario, the chart uses one horizontal page. If neither the `COMPRESS` nor `PCOMPRESS` option is specified, the number of horizontal pages is computed in order to display as much of the chart as possible in a proportional manner.

WEB=*variable*

HTML=*variable*

specifies the character variable in the schedule data set that identifies an HTML page for each activity. The procedure generates an HTML image map using this information for all the schedule bars, milestones, and ID variables corresponding to an activity.

WPREC=*linewidth*

specifies the line width to use for drawing the precedence connections. The default width is 1.

WTNOW=*linewidth*

specifies the line width to use for drawing the timenow line. The default width is 4.

WZONE=*linewidth*

WZLINE=*linewidth*

specifies the line width to use for drawing the horizontal zone lines which demarcate the different zones on the chart. The default linewidth is 1.

ZONE=*variable*

ZONEVAR=*variable*

names the variable in the Schedule data set that is used to separate the Gantt chart into zones. This option enables you to produce a zoned Gantt chart. The GANTT procedure does not sort the Schedule data set and processes the data in the order it appears in the Schedule data set. A change in the value of the zone variable establishes a new zone. By default, the GANTT procedure displays a `ZONE` variable column before the ID variable columns. You can suppress this column using the `NOZONECOL` option. The GANTT procedure also draws a horizontal line demarcating zones. By default, the line spans the entire chart in the horizontal direction, both inside and outside the axis area. You can control the span of this line using the `ZONESPAN=` option. You can also adjust the vertical offset of the line from its default position by using the `ZONEOFFSET=` option. In addition, you can also control the graphical attributes associated with this line such as color, style, and width using the `CZONE=`, `LZONE=`, and `WZONE=` options, respectively.

ZONEOFF=*d*

ZONEOFFSET=*d*

specifies the offset in cellheights of the zone line from its default position of 0.5 cell

height above the top of the first schedule bar for the first activity in the zone. The default value of d is 0. The direction of increase is from top to bottom.

ZONESPAN=*name*

ZONELINE=*name*

specifies the span of the horizontal zone line that is drawn at the beginning of each new zone. Valid values for 'name' are LEFT, RIGHT, ALL, and NONE. The value of LEFT draws a line that spans the width of the columns of text that appear on the left hand side of the Gantt chart. The value of RIGHT draws a line that spans the width of the axis area which appears on the right-hand side of the chart. The value of ALL draws a line spanning both the preceding regions while the value of NONE suppresses the line altogether. The default value is ALL.

ID Statement

ID *variables* ;

The ID statement specifies the variables to be displayed that further identify each activity. If two or more consecutive observations have the same combination of values for all the ID variables, only the first of these observations is plotted unless the **DUPOK** option is specified in the **CHART** statement.

By default, if the ID variables do not all fit on one page, they are all omitted and a message explaining the omission is printed to the log. You can override this behavior and display the maximum number of consecutive ID variables that can fit on a page by specifying the **MAXIDS** option in the **CHART** statement.

If the time axis of a Gantt chart spans more than one page, the ID variables are displayed only on the first page of each activity. You can display the ID variables on every page by specifying the **IDPAGES** option in the **CHART** statement.

Details

Schedule Data Set

Often, the Schedule data set input to PROC GANTT is the output data set (the **OUT=** data set) produced by **PROC CPM**, sometimes with additional variables. Typically, this data set contains

- the start and finish times for the early and late schedules (**E_START**, **E_FINISH**, **L_START**, and **L_FINISH** variables)
- the actual start and finish times (**A_START** and **A_FINISH** variables) of activities that have been completed or are in progress for projects that are in progress or completed
- the resource-constrained start and finish times of the activities (**S_START** and **S_FINISH** variables) for projects that have been scheduled subject to resource constraints

- the baseline start and finish times (B_START and B_FINISH variables) of activities when monitoring and comparing the progress of a project against a target schedule

When such a data set is input as the Schedule data set to PROC GANTT, the procedure draws a Gantt chart showing five different schedules for each activity: the predicted early/late schedules using E_START, E_FINISH, L_START, and L_FINISH on the first line for the activity, the actual schedule using A_START and A_FINISH on the second line, the resource-constrained schedule using S_START and S_FINISH on the third line, and the baseline schedule using B_START and B_FINISH on the fourth line.

The SEGMENT_NO Variable

Normally, each observation of the Schedule data set causes one set of bars to be plotted corresponding to the activity in that observation. If activity splitting has occurred during resource-constrained scheduling, the Schedule data set produced by PROC CPM contains more than one observation for each activity. It also contains a variable named SEGMENT_NO. For activities that are not split, this variable has a missing value. For split activities, the number of observations in the Schedule data set is equal to $(1 + \text{the number of disjoint segments that the activity is split into})$. The first observation corresponding to such an activity has SEGMENT_NO equal to missing, and the S_START and S_FINISH variables are equal to the start and finish times, respectively, of the entire activity. Following this observation, there are as many observations as the number of disjoint segments in the activity. All values for these segments are the same as the first observation for this activity except SEGMENT_NO, S_START, S_FINISH, and the duration. SEGMENT_NO is the index of the segment, S_START and S_FINISH are the resource-constrained start and finish times for this segment, and duration is the duration of this segment. See the “[Displayed Output](#)” section on page 525 for details on how PROC GANTT treats the observations in this case.

Note: For a given observation in the Schedule data set, the finish times (E_FINISH, L_FINISH, A_FINISH, S_FINISH, and B_FINISH) denote the last *day* of work when the variables are formatted as SAS *date* values; if they are formatted as SAS *time* or *datetime* values, they denote the last *second* of work. For instance, if an activity has E_START='2JUN04' and E_FINISH='4JUN04', then the earliest start time for the activity is the beginning of June 2, 2004, and the earliest finish time is the end of June 4, 2004. Thus, PROC GANTT assumes that the early, late, actual, resource-constrained, or baseline finish time of an activity is at the end of the time interval specified for the respective variable. The exceptions to this type of default behavior occur when either the DURATION= option or the PADDING= option is in effect. See the “[Specifying the PADDING= Option](#)” section on page 492 for further details.

All start and finish times, and additional variables specified in the CHART statement must be numeric and have the same formats. The ID and BY variables can be either numeric or character. Although the data set does not have to be sorted, the output may be more meaningful if the data are in order of increasing early start time. Further, if

the data set contains segments of split activities, the data should also be sorted by SEGMENT_NO for each activity.

A family of options, available only in graphics mode, enables you to display the precedence relationships between activities on the Gantt chart. The precedence relationships are established by specifying a set of variables in the CHART statement; this can be done in one of two ways. These variables must lie in the Schedule data set and, optionally, in the Precedence data set defined by the PRECDATA= option in the PROC GANTT statement. See the “[Specifying the Logic Options](#)” section on page 511 for more details on producing a Logic Gantt chart.

Also available in graphics mode is an automatic text annotation facility that enables you to annotate labels on the Gantt chart independently of the SAS/GRAPH Annotate facility. A useful property of this facility is the ability to link label coordinates and text strings to variables in the Schedule data set. You can create links of two types. An implicit link automatically links an observation in the Label data set to every observation in the Schedule data set. An explicit link uses a variable that must exist on both data sets and be identical in type and length. For more information on the linking variable in the automatic text annotation facility, see the “[Automatic Text Annotation](#)” section on page 519.

Missing Values in Input Data Sets

Table 6.19 summarizes the treatment of missing values for variables in the input data sets used by PROC GANTT.

Table 6.19. Treatment of Missing Values in PROC GANTT

Data Set	Variable	Action
CALEDATA	CALID	default calendar (0 or “DEFAULT”)
	SUN, ..., _SAT_ D_LENGTH	corresponding shift for default calendar DAYLENGTH, if available; else, 8:00, if INTERVAL=WORKDAY or DTWRKDAY; 24:00, otherwise
DATA	A_FINISH	value ignored
	A_START	value ignored
	ACTIVITY	input error: logic options are ignored
	B_FINISH	value ignored
	B_START	value ignored
	CALID	default calendar (0 or “DEFAULT”)
	CHART	value ignored
	DUR	nonzero
	E_FINISH	value ignored
	E_START	value ignored
	HEADNODE	input error: logic options are ignored
	ID	missing
	L_FINISH	value ignored
L_START	value ignored	
LAG	FS	
S_FINISH	value ignored	

Table 6.19. (continued)

Data Set	Variable	Action
HOLIDATA	S_START	value ignored
	SEGMT_NO	See the “ Displayed Output ” section on page 525
	SUCCESSOR	value ignored
	TAILNODE	input error: logic options are ignored
	ZONE	zone value
	CALID	holiday applies to all calendars defined
	HOLIDAY	observation ignored
	HOLIDUR	ignored, if HOLIFIN is not missing; else, 1.0
LABDATA	HOLIFIN	ignored, if HOLIDUR is not missing; else, HOLIDAY + (1 unit of INTERVAL)
	_ALABEL	0
	_CLABEL	CTEXT=
	_FLABEL	FONT=
	_HLABEL	1
	_JLABEL	L
	_LABEL	use _LVAR
	_LVAR	value ignored
	_PAGEBRK	0
	_RLABEL	0
	_X	use _XVAR
	_XOFFSET	0
	_XVAR	value ignored
	_XSYS	DATA
	_Y	use LABVAR=
	_YOFFSET	0
	_YSYS	DATA
PRECDATA	LABVAR	value ignored
	ACTIVITY	input error: logic options are ignored
	LAG	FS
WORKDATA	SUCCESSOR	value ignored
	any numeric variable	00:00, if first observation; 24:00, otherwise

Specifying the PADDING= Option

As explained in the “[Schedule Data Set](#)” section on page 489, the finish times in the Schedule data set denote the final time unit of an activity’s duration; that is, the activity finishes at the end of the day/second specified as the finish time. A plot of the activity’s duration should continue through the end of the final time unit. Thus, if the value of the E_FINISH variable is ‘4JUN04’, the early finish time for the activity is plotted at the end of June 4, 2004 (or the beginning of June 5, 2004).

In other words, the finish times are *padded* by a day (second) if the finish time variables are formatted as SAS date (SAS time or datetime) values. This treatment is consistent with the meaning of the variables as output by [PROC CPM](#). Default values of PADDING corresponding to different format types are shown in [Table 6.20](#).

The PADDING= option is provided to override the default padding explained above. Valid values of this option are NONE, SECOND, MINUTE, HOUR, DAY, WEEK, MONTH, QTR, YEAR, DTSECOND, DTMINUTE, DTHOUR, DTWEEK, DTMONTH, DTQTR, and DTYEAR. Use the value NONE if you do not want the finish times to be adjusted.

Table 6.20. Default Values of the PADDING= Option Corresponding to Format Type

Format	PADDING
SAS time value	SECOND
SAS date value	DAY
SAS datetime value	DTSECOND
Other	NONE

It is recommended that when plotting zero duration activities, you include a variable in the Schedule data set that has value zero if and only if the activity has zero duration. Defining this variable to the GANTT procedure using the DURATION= (or DUR=) option in the CHART statement ensures that a zero duration activity is represented on the chart by a Milestone. If this is not done, an activity with zero duration is shown on the chart as having a positive duration since finish times are padded to show the end of the last time unit.

Page Format

The GANTT procedure divides the observations (activities) into a number of subgroups of approximately equal numbers. The size of each group is determined by the PAGESIZE system option. Similarly, the time axis is divided into a number of approximately equal divisions depending on the LINESIZE system option.

If the FILL option is specified, however, each page is filled as completely as possible before plotting on a new page. If both axes are split, the pages are ordered with the chart for each group of activities being plotted completely (the time axis occupying several consecutive pages, if needed) before proceeding to the next group.

If a BY statement is used, each BY group is formatted separately.

Two options that control the format of the chart are the MININTERVAL= and SCALE= options. The value for the MININTERVAL= option, denoted by *mininterval*, is the smallest time interval unit to be identified on the chart. The value for the SCALE= option, denoted by *scale*, is the number of columns to be used to denote one unit of *mininterval*. For example, if MININTERVAL=MONTH and SCALE=10, the chart is formatted so that 10 columns denote the period of one month. The first of these 10 columns denotes the start of the month and the last denotes the end, with each column representing approximately three days. Further, the INCREMENT= option can be used to control the labeling. In this example, if INCREMENT=2, then the time axis would have labels for alternate months.

Specifying the `MININTERVAL=` Option

The value specified for the `MININTERVAL=` option is the smallest time interval unit to be identified on the chart. If the time values being plotted are SAS *date* values, the valid values for *mininterval* are DAY, WEEK, MONTH, QTR, or YEAR. If the values are SAS *datetime* values, valid values for *mininterval* are DTSECOND, DTMINUTE, DTHOUR, DTDAY, DTWEEK, DTMONTH, DTQTR, or DTYEAR. If they are SAS *time* values, then valid values are SECOND, MINUTE, or HOUR.

Note: If the times being plotted are SAS *datetime* values and *mininterval* is either DTSECOND, DTMINUTE, or DTHOUR, the output generated could run into several thousands of pages. Therefore, be careful when choosing a value for *mininterval*.

Table 6.21 shows the default values of *mininterval* corresponding to different formats of the times being plotted on the chart.

Table 6.21. Default Values of the `MININTERVAL=` Option

Format	MININTERVAL= Value
DATEw.	DAY
DATETIMEw.d	DTDAY
HHMMw.d	HOUR
MONYYw.	MONTH
TIMEw.d	HOUR
YYMMDDw.	MONTH
YYQw.	MONTH

Labeling on the Time Axis

If the variables being plotted in the chart are unformatted numeric values, the time axis is labeled by the corresponding numbers in increments specified by the `INCREMENT=` option. However, if the variables have *date*, *datetime*, or *time* formats, then the time axis is labeled with two or three lines. Each line is determined by the value of *mininterval*, which in turn is determined by the format of the plotted times (see Table 6.21). Table 6.22 illustrates the format of the label corresponding to different values of *mininterval*.

Table 6.22. Label Format Corresponding to `MININTERVAL=` Value

MININTERVAL= Value	First Line	Second Line	Third Line
DAY, WEEK, DTWEEK MONTH, QTR, YEAR, DTMONTH, DTQTR, DTYEAR	month year	day month	
DTSECOND, DTMINUTE, DTHOUR, DTDAY SECOND, MINUTE, HOUR	month time	day	time

Multiple Calendars and Holidays

Work pertaining to a given activity is assumed to be done according to a particular *calendar*. A calendar is defined in terms of a *work pattern* for each day and a *work-week structure* for each week. In addition, each calendar may include holidays during the year. See the “Multiple Calendars” section in the [PROC CPM](#) chapter for details on how calendars are defined and how all the options work together. In this chapter, a less detailed description is provided. [PROC GANTT](#) uses the same structure as [PROC CPM](#) for defining calendars, but the options for using them differ in minor ways. The following are the differences in syntax:

- The [CALID](#) variable is specified as an option in the [CHART](#) statement and is not a separate statement as in [PROC CPM](#).
- The [HOLIDAY](#) variable is specified as an option in the [CHART](#) statement and is not a separate statement as in [PROC CPM](#).
- The [HOLIDUR](#) and [HOLIFIN](#) variables are specified as options in the [CHART](#) statement and not in a separate [HOLIDAY](#) statement.
- The [INTERVAL=](#) option is specified in the [CHART](#) statement and not in the procedure statement as in [PROC CPM](#).

The [WORKDATA](#) (or Workday) data set specifies distinct shift patterns during a day. The [CALEDATA](#) (or Calendar) data set specifies a typical workweek for all the calendars in the project; for each day of a typical week, it specifies the shift pattern that is followed. The [HOLIDATA](#) (or Holiday) data set specifies a list of holidays and the calendars that they refer to; holidays are defined either by specifying the start of the holiday and its duration in *interval* units, where the [INTERVAL=](#) option has been specified as *interval*, or by specifying the start and end of the holiday period. If both the [HOLIDUR](#) and the [HOLIFIN](#) variables have missing values in a given observation, the holiday is assumed to start at the date and time specified for the [HOLIDAY](#) variable and last one unit of *interval*. If a given observation has valid values for both the [HOLIDUR](#) and the [HOLIFIN](#) variables, only the [HOLIFIN](#) variable is used so that the holiday is assumed to start and end as specified by the [HOLIDAY](#) and [HOLIFIN](#) variables, respectively. The [Schedule](#) data set (the [DATA=](#) data set), specifies the calendar that is used by each activity in the project through the [CALID](#) variable (or a default variable [_CAL_](#)). Each of the three data sets used to define calendars is described in greater detail in the “Multiple Calendars” section in the [PROC CPM](#) chapter.

Each new value for the [CALID](#) variable in either the Calendar or the Holiday data set defines a new calendar. If a calendar value appears in the Calendar data set and not in the Holiday data set, it is assumed to have the same holidays as the default calendar (the default calendar is defined in the [PROC CPM](#) chapter). If a calendar value appears in the Holiday data set and not in the Calendar data set, it is assumed to have the same work pattern structures (for each week and within each day) as the default calendar. In the Schedule data set, valid values for the [CALID](#) variable are those that are defined in either the Calendar or the Holiday data set.

All the holiday, workday and workweek information is used by PROC GANTT for display only; in particular, the weekend and shift information is used only if the `MARKWKND` or `MARKBREAK` option is in effect. The value of the `INTERVAL=` option, which has a greater scope in PROC CPM, is used here only to determine the end of holiday periods appropriately. Further, the Workday, Calendar, and Holiday data sets and the processing of holidays and different calendars are supported only when *interval* is DAY, WEEKDAY, WORKDAY, DTSECOND, DTMINUTE, DTHOUR, DTDAY, or DTRKDAY.

Specifying the `INTERVAL=` Option

The `INTERVAL=` option is needed only if you want holidays or breaks or both during a week or day to be indicated on the Gantt chart. The value of `INTERVAL=` is used to compute the start and end of holiday periods to be compatible with the way they were computed and used by PROC CPM. Further, if the `MARKWKND` or `MARKBREAK` option is in effect, the `INTERVAL=` option, in conjunction with the `DAYSTART=` and `DAYLENGTH=` options and the Workday, Calendar, and Holiday data sets, helps identify the breaks during a standard week or day as well as the holidays that are to be marked on the chart. Valid values of *interval* are DAY, WEEKDAY, WORKDAY, DTSECOND, DTMINUTE, DTHOUR, DTDAY, and DTWRKDAY. If *interval* is WEEKDAY, WORKDAY, or DTWRKDAY, the `MARKWKND` option is in effect; otherwise, breaks during a week are indicated only if `MARKWKND` is specified and breaks within a day are marked only if `MARKBREAK` is specified.

Full-Screen Version

You can invoke PROC GANTT in full-screen mode by specifying `FS` (or `FULLSCREEN`) in the PROC GANTT statement. The full-screen mode offers you a convenient way to browse the Gantt chart for the project. For large projects, where the chart could span several pages, the full-screen mode is especially convenient because you can scroll around the output using commands on the command line, pull-down menus, or function keys. You can scroll vertically to a given job on the task axis by specifying a job number or scroll horizontally to a given point in time along the time axis by specifying a date. You can optionally display the title and the legend.

The specifications for the full-screen version of PROC GANTT and the output format are the same as those for the line-printer version. The following is a list of the few minor differences:

- The `FILL` option is not relevant in this case because all of the activities are plotted on one logical page.
- The `NOLEGEND` option is not effective. The screen always displays only the body of the chart along with the ID columns. To see what the symbols mean, you can use the `SHOW LEGEND` command, which causes the legend to be displayed at the bottom of the chart. To delete the legend, use the `DELETE LEGEND` command.
- The `SUMMARY` option is not supported in full-screen mode.

- The `SCALE=` option works the same way as in the line-printer version, except for its default behavior. The default value is always 1, unlike in the line-printer case where, if the time axis fits on less than one page, the default value is chosen so that the time axis fills as much of the page as possible.

Output Format

The output format is similar to the line-printer version of PROC GANTT. When PROC GANTT is invoked with the `FS` option, the screen is filled with a display of the Gantt chart. The display consists of column headings at the top and ID values (if an `ID` statement is used to specify ID variables) at the left. The body of the chart occupies the bottom right portion of the display. The column headings can be scrolled left or right, the ID values can be scrolled up or down, and the body of the chart can scroll along both directions. The display does not include the TITLES or LEGEND.

In addition to using the symbols and join characters as described for the line-printer version of PROC GANTT, the full-screen version also uses different colors to distinguish the types of activities and their associated bars.

You can use the `FIND` command to locate a particular job (by job number) or a particular time along the time axis. The format of the `FIND` command is `FIND JOB n` or `FIND TIME t`. All the commands that are specific to PROC GANTT are described as follows.

Local Commands

Table 6.23 lists the commands that can be used in the full-screen version of PROC GANTT.

Table 6.23. Full-Screen Commands and Their Purpose

Scrolling	Controlling Display	Exiting
BACKWARD	SHOW	END
FORWARD	DELETE	CANCEL
LEFT	FIND	
RIGHT		
TOP		
BOTTOM		
VSCROLL		
HSCROLL		

BACKWARD

scrolls towards the top of the Gantt chart by the `VSCROLL` amount. A specification of `BACKWARD MAX` scrolls to the top of the chart. You can also specify the vertical scroll amount for the current command as `BACKWARD PAGE | HALF | n`. Note that during vertical scrolling, the column headings are not scrolled.

BOTTOM

scrolls to the bottom of the Gantt chart.

DELETE LEGEND | TITLE

deletes the legend or the title from the screen. A specification of **DELETE LEGEND** deletes the legend from the current display; **DELETE TITLE** deletes the current title (titles) from the current display.

END

ends the current invocation of the procedure.

FIND

scrolls to the specified position on the chart. The format of the command is **FIND JOB *n*** or **FIND TIME *t***.

A specification of **FIND JOB *n*** scrolls backward or forward, as necessary, in order to position the activity with job number *n* on the screen. The specified activity is positioned at the top of the screen, unless this would result in blank space at the bottom of the screen. In this instance, the chart is scrolled down to fit as many jobs as space permits.

A specification of **FIND TIME *t*** scrolls left or right, as necessary, in order to position the time *t* on the time axis to appear on the screen. The specified time is positioned at the left boundary of the displayed chart area unless this would result in blank space at the right of the screen. In this instance, the chart is scrolled to the right to fit as much of the time axis as space permits.

FORWARD

scrolls towards the bottom of the Gantt chart by the **VSCROLL** amount. A specification of **FORWARD MAX** scrolls to the bottom of the chart. You can also specify the vertical scroll amount for the current command as **FORWARD PAGE | HALF | *n***. Note that during vertical scrolling, the column headings are not scrolled.

HELP

displays a **HELP** screen listing all the full-screen commands specific to **PROC GANTT**.

HOME

moves the cursor to the command line.

HSCROLL

sets the amount of information that scrolls horizontally when you execute the **LEFT** or **RIGHT** command. The format is **HSCROLL PAGE | HALF | *n***. The specification is assumed to be in number of columns. A specification of **HSCROLL PAGE** sets the scroll amount to be the number of columns in the part of the screen displaying the plot of the schedules. A specification of **HSCROLL HALF** is half that amount; **HSCROLL *n*** sets the horizontal scroll amount to *n* columns. The default setting is **PAGE**.

KEYS

displays current function key settings.

LEFT

scrolls towards the left boundary of the Gantt chart by the **HSCROLL** amount. A specification of **LEFT MAX** scrolls to the left boundary. You can also specify the

horizontal scroll amount for the current command as `LEFT PAGE | HALF | n`. Note that during horizontal scrolling, the ID columns are not scrolled.

RIGHT

scrolls towards the right boundary of the Gantt chart by the `HSCROLL` amount. A specification of `RIGHT MAX` scrolls to the right boundary. You can also specify the horizontal scroll amount for the current command as `RIGHT PAGE | HALF | n`. Note that during horizontal scrolling, the ID columns are not scrolled.

SHOW LEGEND | TITLE

displays the legend or the title on the screen. A specification of `SHOW LEGEND` displays the legend in the bottom portion of the current display; `SHOW TITLE` displays the current title (titles) in the top portion of the current display.

TOP

scrolls to the top of the Gantt chart.

VSCROLL

sets the amount of information that scrolls vertically when you execute the `BACKWARD` or `FORWARD` command. The format is `VSCROLL PAGE | HALF | n`. The specification is assumed to be in number of rows. A specification of `VSCROLL PAGE` sets the scroll amount to be the number of rows in the part of the screen displaying the plot of the schedules. A specification of `VSCROLL HALF` is half that amount; `VSCROLL n` sets the vertical scroll amount to n rows. The default setting is `PAGE`.

Global Commands

Most of the global commands used in SAS/FSP software are also valid with `PROC GANTT`. Some of the commands used for printing screens are described below.

SAS/FSP software provides you with a set of printing commands that enable you to take pictures of windows and to route those pictures to a printer or a file. Whether you choose to route these items directly to a printer queue or to a print file, SAS/FSP software provides you with a means of specifying printing instructions. The following is an overview of these related commands and their functions:

FREE

releases all items in the print queue to the printer. This includes pictures taken with the `SPRINT` command as well as items sent to the print queue with the `SEND` command. All items in the print queue are also automatically sent to the printer when you exit the procedure, send an item that uses a different form, or send an item to a print file. Items are also sent automatically when internal buffers have been filled.

Items sent to a file: If you have routed pictures taken with the `SPRINT` command to a file rather than to a printer, the file is closed when you execute a `FREE` command. It is also closed when you send an item that uses a different form, send items to a different print file or to the print queue, or exit the procedure.

Note: Any items sent to the same print file after it has been closed will replace the current contents.

PRTFILE *'filename'*

PRTFILE *fileref*

PRTFILE CLEAR

specifies a file to which the procedure sends pictures taken with the **SPRINT** command instead of sending them to the default printer. You can specify an actual filename or a previously assigned fileref.

Using a filename: To specify a file named *destination-file*, execute

```
prtfile 'destination-file'
```

where *destination-file* follows your system's conventions. Note that quotes are required when you specify a filename rather than a fileref.

Using a fileref: You can also specify a previously assigned fileref.

Using the default: Specify **PRTFILE CLEAR** to prompt the procedure to route information once again to the queue for the default printer.

Identify the current print file: Specify **PRTFILE** to prompt the procedure to identify the current print file.

SPRINT [**NOBORDER**][**NOCMD**]

takes a picture of the current window exactly as you see it, including window contents, border, and command line. By default, the picture is sent to the queue for the default printer.

Border and command line: By default, both the window border and command line are included in the picture you take with the **SPRINT** command. You can capture a picture of the window contents that excludes either the window border, the command line, or both. Specify the **NOBORDER** option to exclude the border and the **NOCMD** option to exclude the command line. Taking a picture of the window contents without the border and command line is a convenient way to print text for a report.

Destination: The destination of the picture captured with the **SPRINT** command is determined by the **PRTFILE** command. By default, the picture goes to the default printer. Use the **PRTFILE** command if you want it sent to a file instead. Each time you execute the **SPRINT** command, the picture you take is appended to the current print file; it does not write over the current file. See the **PRTFILE** command for further explanation.

Graphics Version

Formatting the Chart

If necessary, **PROC GANTT** divides the Gantt chart into several pages. You can force the Gantt chart to fit on one page by specifying the **COMPRESS** option in the **CHART** statement. You can achieve a similar result using the **PCOMPRESS** option, which maintains the aspect ratio as well. In addition, you can fit the chart

into a prescribed number of horizontal and vertical pages by using the `HPAGES=` and `VPAGES=` options in the `CHART` statement.

The amount of information contained on each page is determined by the values of the graphics options `HPOS=` and `VPOS=` specified in a `GOPTIONS` statement. If any compression of the Gantt chart is performed, the values of `HPOS` and `VPOS` are increased, as necessary, to the number of rows and columns respectively, that the entire chart occupies in uncompressed mode. The default height of each row of the Gantt chart is computed as $(100/v)\%$ of the screen height where `VPOS=v`. Thus, the larger the value of `VPOS`, the narrower the row. You can control the default bar height and default bar offset by using the `BARHT=` option and the `BAROFF=` option, respectively. You can further override these at the schedule level. For example, the `ABARHT=` option affects only the height of the actual schedule bars. The screen is assumed to be divided into h columns where `HPOS=h`; thus, each column is assumed to be as wide as $(100/h)\%$ of the screen width. Hence, the specifications `SCALE=10` and `MININTERVAL=WEEK` imply that a duration of one week is denoted by a bar of length $(1000/h)\%$ of the screen width.

The height of the text characters is controlled by both the `HEIGHT=` option in the `CHART` statement and the `HTEXT=` option specified in a `GOPTIONS` statement. The text height is set equal to the product of the `HEIGHT=` and `HTEXT=` values. The units in which the text height is measured are those of the `HTEXT=` option. By default, the value of `HEIGHT=` is 1, which sets the text height to be equal to the `HTEXT=` value. The default value of `HTEXT=` is 1 unit, where a unit is defined by the `GUNIT=` option in a `GOPTIONS` statement. Thus, in the absence of the `HEIGHT=`, `HTEXT=`, and `GUNIT=` options, the text height is the same as the bar height, namely one cell height. Increasing the value of `HEIGHT=` is useful when you use the `COMPRESS` option, particularly when you have a very large chart. Since the chart is scaled as appropriate to fit on one page, the text can be very hard to discern, or even illegible, and would benefit from enlargement. Relative positioning of the font baseline for activity text is controlled by the `HTOFF=` option in the `CHART` statement. By default, the font baseline for an activity is at the bottom of the first bar corresponding to the activity.

The color of the text characters is specified using the `CTEXT=` option in the `CHART` statement. If `CTEXT=` is not specified, `PROC GANTT` uses the value of the `CTEXT=` option specified in a `GOPTIONS` statement that has a default value of the first color in the current `COLORS=` list in the `GOPTIONS` statement. You can override the text colors for selected columns of activity text at the activity level by using a `PATTERN` variable in the Schedule data set and specifying the `CTEXTCOLS=` option in the `CHART` statement.

The font used for the text characters is specified with the `FONT=` option in the `CHART` statement. If `FONT=` is not specified, `PROC GANTT` uses the value of the `FTEXT=` option specified in a `GOPTIONS` statement that has a default value of the hardware font for your output device. If the hardware font cannot be used, the `SIMULATE` font is used instead. The default value of the `SIMULATE` font is the `SIMPLEX` font.

Global `PATTERN` statements are used to specify the fill pattern for the different types

of bars drawn on the Gantt chart. Each fill pattern can be associated with a color. Patterns can be used to reflect the status of an activity (normal, critical, supercritical) in the predicted early/late schedule, to indicate the different schedule types (actual, resource-constrained, baseline), and to represent weekends, holidays and breaks on the Gantt chart. See the “Using **PATTERN Statements**” section on page 503 for details. In addition, you can override these fill patterns for selected schedules at an activity level by using a **PATTERN** variable in the Schedule data set and specifying the **PATLEVEL=** option in the **CHART** statement.

You can use global **SYMBOL statements** to define the symbols that represent **CHART** variables in the Gantt chart. The **SYMBOL** statement enables you to select symbols from different fonts and modify their appearance to suit your requirements. You can specify a color and a height for the symbol in addition to a variety of other options. See the “Using **SYMBOL Statements**” section on page 506 for details.

Annotate Processing

The Annotate facility enables you to enhance graphics output produced by **PROC GANTT**. However, if the only items being annotated are symbols and text strings, it is recommended that you use the **Automatic Text Annotation** facility that is built into the Gantt procedure instead. This facility was developed specifically for labeling Gantt charts; it has some very useful features and requires a minimum of effort.

To use the **SAS/GRAPH** Annotate facility, you must create an Annotate data set that contains a set of graphics commands that can be superimposed on the Gantt chart. This data set has a specific format and must contain key variables. Each observation in the Annotate data set represents a command to draw a graphics element or perform an action. The values of the variables in the observation determine what is done and how it is done. The observations in an Annotate data set can be created by explicitly assigning values to the Annotate variables through a **DATA** step or **SAS/FSP** procedure or by implicitly assigning values with Annotate macros within a **SAS DATA** step. The process of creating Annotate observations is greatly simplified through the use of Annotate macros.

Coordinates specify where graphic elements are to be positioned. A coordinate system, in turn, determines how coordinates are interpreted. There are several different coordinate systems that are used by the Annotate facility. Typically, one of three major drawing areas can be associated with any coordinate system: data area, procedure output area, and graphics output area. This chapter explains the coordinate system that is based on the data area of **PROC GANTT**.

When annotating a graph produced by any of the graphics procedures, you may find it helpful to use data coordinates that refer to the data values corresponding to the graph that is being annotated. For example, if you want to label a particular activity of a Gantt chart with additional text, you can position the text accurately if you use data coordinates instead of screen coordinates. With respect to **PROC GANTT**, the Annotate facility uses the time axis and the activity axis of the Gantt chart as the basis for the data coordinate system. To use this feature, create a Annotate data set based on the Schedule data set that is input to the procedure, utilizing Annotate macros whenever possible to simplify the process.

Note: The data coordinate system enables you to annotate the graph even if it spans multiple pages. However, each annotation must be entirely contained within a given page. For example, you cannot annotate a line on the Gantt chart that runs from one page of the chart to another.

In addition to a coordinate system based on the data, you can select a coordinate system based on either the procedure output area or the Graphics output area. You would typically need to use one of these systems, for example, if you want to annotate text outside the chart area.

Using **PATTERN** Statements

PROC GANTT uses those patterns that are available with the GCHART procedure. PROC GANTT uses a maximum of nine different patterns to denote various phases in an activity's duration and the various types of schedules that are plotted. Patterns are specified in **PATTERN** statements that can be used anywhere in your SAS program. [Table 6.24](#) lists the function of each of the first nine **PATTERN** statements that are used by PROC GANTT.

Any **PATTERN** statements that you specify are used. If more are needed, default **PATTERN** statements are used.

You can override any of these patterns at the activity level by using a **PATTERN** variable in the schedule data set. A **PATTERN** variable is identified by specifying the **PATTERN=** option in the **CHART** statement or by the presence of the default **_PATTERN** variable.

Table 6.24. **PATTERN** Statements used by PROC GANTT

PATTERN	Used to Denote
1	duration of a noncritical activity
2	slack time for a noncritical activity
3	duration of a critical activity
4	slack time for a supercritical activity
5	duration of a supercritical activity
6	actual duration of an activity
7	break due to a holiday
8	resource-constrained duration of an activity
9	baseline duration of an activity

Refer to the SAS/GRAPH documentation for a detailed description of **PATTERN** statements. Most of the relevant information is reproduced here for the sake of completeness.

PATTERN Statement Syntax

The general form of a **PATTERN** statement is

PATTERN*n options;*

where

- *n* is a number ranging from 1 to 255. If you do not specify a number after the keyword PATTERN, PATTERN1 is assumed.
- *options* enables you to specify the colors and patterns used to fill the bars in your output.

PATTERN statements are additive; if you specify a C= or V= option in a PATTERN statement and then omit that option in a later PATTERN statement ending in the same number, the option remains in effect. To turn off options specified in a previous PATTERN*n* statement, either specify all options in a new PATTERN*n* statement, or use the keyword PATTERN*n* followed by a semicolon. For example, the following statement turns off any C= or V= option specified in previous PATTERN3 statements:

```
pattern3;
```

You can reset options in PATTERN statements to their default values by specifying a null value. A comma can be used (but is not required) to separate a null parameter from the next option.

For example, both of the following statements cause the C= option to assume its default value (the value of the CPATTERN= option or the first color in the COLORS= list):

```
pattern c=, v=solid;
```

or

```
pattern c= v=solid;
```

In the following statement, both options are reset to their default values:

```
pattern2 c= v=;
```

You can also turn off options by specifying the RESET= option in a GOPTIONS statement.

General options

You can specify the following options in a PATTERN statement.

COLOR=*color*

C=*color*

specifies the color to use for a bar or other area to be filled. If you do not specify the C= option in a PATTERN statement, the procedure uses the value you specified for the CPATTERN= option in a GOPTIONS statement. If you omitted the CPATTERN=

option, the procedure uses the pattern specified by the V= option (see below) with each color in the COLORS= list before it uses the next PATTERN statement.

REPEAT=*n*

R=*n*

specifies the number of times the PATTERN statement is to be reused. For example, the following statement represents one pattern to be used by SAS/GRAPH software:

```
pattern1 v=x3 c=red;
```

You can use the REPEAT= option in the statement to repeat the pattern before going to the next pattern. For example, if you specify the following statements, PATTERN1 is repeated ten times before PATTERN2 is used:

```
pattern1 v=x3 c=red r=10;
pattern2 v=s c=blue r=10;
```

Remember that if you omit the COLOR= option in the PATTERN statement and you do not specify the CPATTERN= option, SAS/GRAPH software repeats the pattern for each color in the current COLORS= list. If you specify the R= option in a PATTERN statement from which the C= option is omitted, the statement cycles through the COLORS= list the number of times given by the value of the R= option.

For example, if the current device has seven colors, then the following statement results in 70 patterns because each group of seven patterns generated by cycling through the COLORS= list is repeated ten times:

```
pattern v=x3 r=10;
```

VALUE=*value*

V=*value*

specifies the pattern to use for a bar or other area to be filled. The valid values you can use depend on what procedure you are using and the type of graph you are producing. In PROC GANTT, which produces bars, you must use one of the pattern values shown in [Figure 6.6](#).

In a PATTERN statement, if you specify a value for the V= option but not for the C= option, the procedure uses the value you specified for the CPATTERN= option in a GOPTIONS statement. If you omitted the CPATTERN= option, the procedure uses the pattern specified for the V= option with each color in the COLORS= list before it uses the next PATTERN statement. Thus, if you specify the following statements, the PATTERN1 statement is used for the first type of bar, namely, for the duration of a noncritical activity:

```
pattern1 c=red v=x3;
pattern2 v=s;
pattern3 c=blue v=l3;
pattern4 c=green v=r4;

proc gantt data=sched;
```


The PATTERN2 statement is used for the second type of bar, namely, for the slack time of a noncritical activity. Because a C= value is not specified in the PATTERN2 statement, SAS/GRAPH software uses the PATTERN2 statement and cycles through the colors in the COLORS= list for the device to obtain as many patterns as there are colors in the list. If needed, the PATTERN3 and PATTERN4 values are then used for any remaining types of bars.

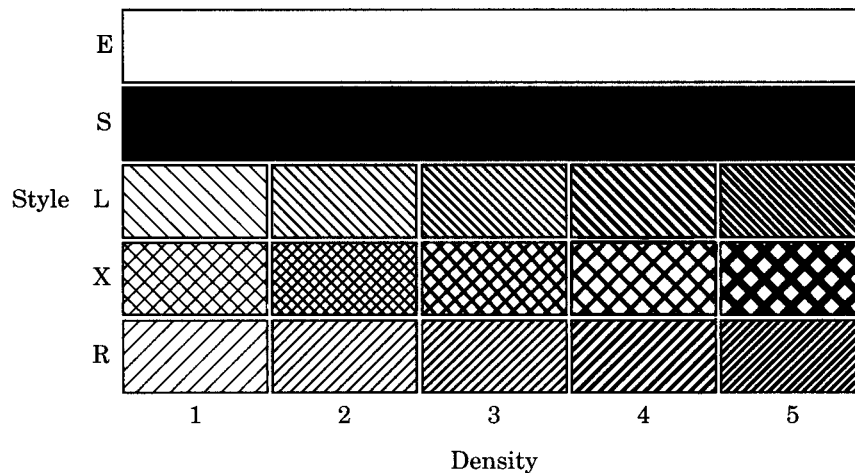


Figure 6.6. Pattern Selection Guide

Using SYMBOL Statements

You can specify a SYMBOL statement anywhere in your SAS program. SYMBOL statements give PROC GANTT information about the characters to be used for plotting the CHART variables.

See also the “[Special Fonts for Project Management and Decision Analysis](#)” section on page 509 for a description of some typically used Gantt chart symbols that can be specified using a SYMBOL statement.

Refer to the SAS/GRAPH documentation for a detailed description of SYMBOL statements. Most of the relevant information is reproduced here for the sake of completeness.

SYMBOL Statement Syntax

The general form of a SYMBOL statement is

SYMBOL*n options*;

where

- *n* is a number ranging from 1 to 255. Each SYMBOL statement remains in effect until you specify another SYMBOL statement ending in the same number. If you do not specify a number following the keyword SYMBOL, SYMBOL1 is assumed.
- *options* enables you to specify the plot characters and color.

SYMBOL statements are additive; that is, if you specify a given option in a SYMBOL statement and then omit that option in a later SYMBOL statement ending in the same number, the option remains in effect. To turn off all options specified in previous SYMBOL statements, you can specify all options in a new SYMBOL n statement, use the keyword SYMBOL n followed by a semicolon, or specify a null value. A comma can be used (but is not required) to separate a null parameter from the next option.

For example, both of the following statements cause the C= option to assume its default value (the value of the CSYMBOL= option or the first color in the COLORS= list):

```
symbol11 c=, v=plus;
```

and

```
symbol11 c= v=plus;
```

In the following statement, both options are reset to their default values:

```
symbol14 c= v=;
```

You can also turn off options by specifying the RESET= option in a GOPTIONS statement.

General options

You can specify the following options in the SYMBOL statement.

COLOR=*color*

C=*color*

specifies the color to use for the corresponding plot specification. If you do not specify the C= option in a SYMBOL statement, the procedure uses the value you specified for the CSYMBOL= option in a GOPTIONS statement. If you omit the CSYMBOL= option, the procedure uses the value specified by the V= option with each color in the COLORS= list before it uses the next SYMBOL statement.

FONT=*font*

F=*font*

specifies the font from which the symbol corresponding to the value specified with the V= option is to be drawn. If you do not specify a font, the V= option specifies the symbol from the special symbol table shown in [Table 6.25](#).

H=*height*

specifies the height of the symbol that is to be drawn.

For example, this SYMBOL statement

```
symbol11 c=green v=K f=special h=2;
```

indicates that the symbol at each data point is the letter K from the SPECIAL font (a filled square), drawn in green, the height being twice the bar height.

REPEAT=*n*

R=*n*

specifies the number of times the SYMBOL statement is to be reused.

V=*special-symbol*

V=*'string'*

identifies the symbols from the font specified by the FONT= option in the SYMBOL statement for the corresponding plot specifications. If the FONT= option is not specified, the plot symbol is the symbol corresponding to the value of V= in the special symbol table shown in [Table 6.25](#). Also permitted without a FONT= specification are the letters A through W and the numbers 0 through 9. If the font is a symbol font, such as MARKER, the string specified with the V= option is the character code for the symbol. If the font is a text font, such as SWISS, the string specified with the V= option is displayed as the plot symbol. By default, the value of V= is PLUS, which produces the plus symbol (+) from the special symbol table.

Note that if you use the special symbol comma (,) with the V= option, you must enclose the comma in quotes as illustrated in the following statement:

```
symbol11 v=' , ' ;
```

Table 6.25. Special Symbol Table

VALUE=	Plot Symbol	VALUE=	Plot Symbol
PLUS	+	% (percent)	♣
X	×	& (ampersand)	♠
STAR	*	' (single quote)	♣
SQUARE	□	= (equals)	☆
DIAMOND	◇	- (hyphen)	⊙
TRIANGLE	△	@ (at)	♀
HASH	#	* (asterisk)	♀
Y	Y	+ (plus)	⊕
Z	Z	> (greater than)	♂
PAW	⋮	. (period)	♂
POINT	.	< (less than)	♂
DOT	●	, (comma)	♂
CIRCLE	○	/ (slash)	♂
_ (underscore)	◻	? (question mark)	♂
" (double quote)	♠	((left parenthesis)	♂
# (pound sign)	♥	) (right parenthesis)	♂
\$ (dollar sign)	◇	: (colon)	*

Note: The words or special characters in the VALUE= column are entered exactly as shown.

Special Fonts for Project Management and Decision Analysis

Two special marker fonts, ORFONT and ORFONTE, are available in versions 6.08 and later. These two fonts are meant to be used with SAS/OR software and provide a variety of symbols that are typically used in Project Management and Decision Analysis. The fonts ORFONT and ORFONTE are shown in [Figure 6.7](#) and [Figure 6.8](#), respectively. The fonts behave like any SAS/GRAPH font providing you with the capability to control attributes such as color and height.

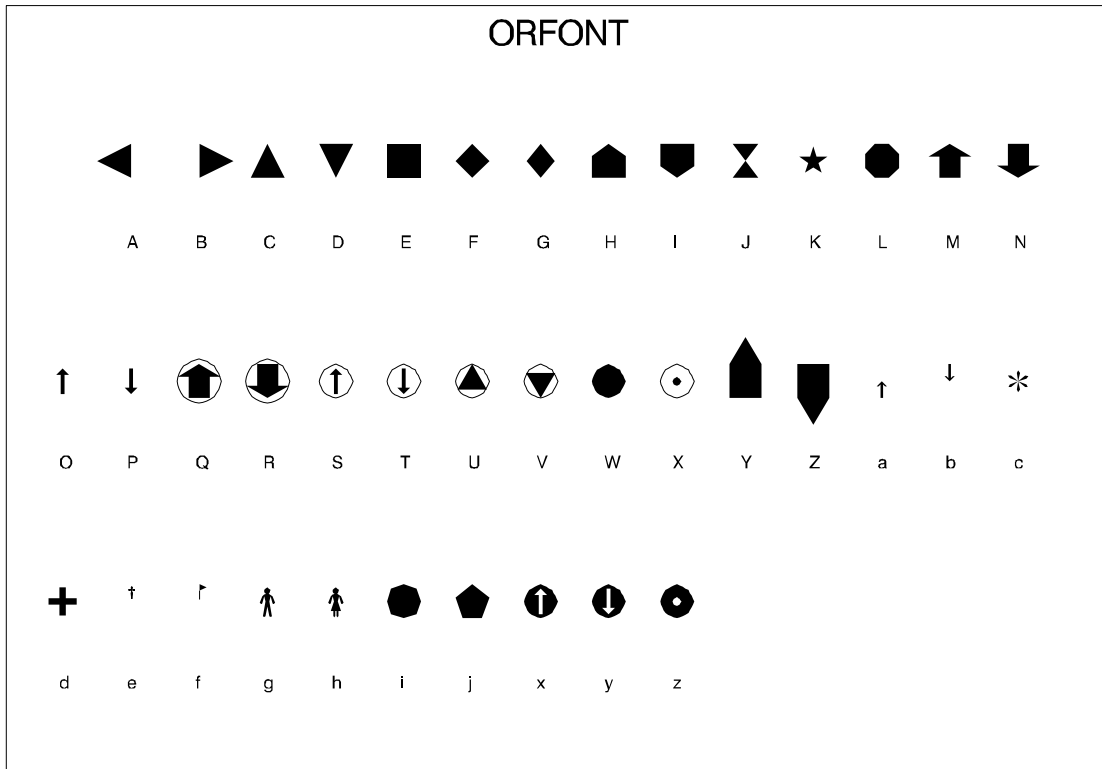


Figure 6.7. ORFONT - A Filled Font

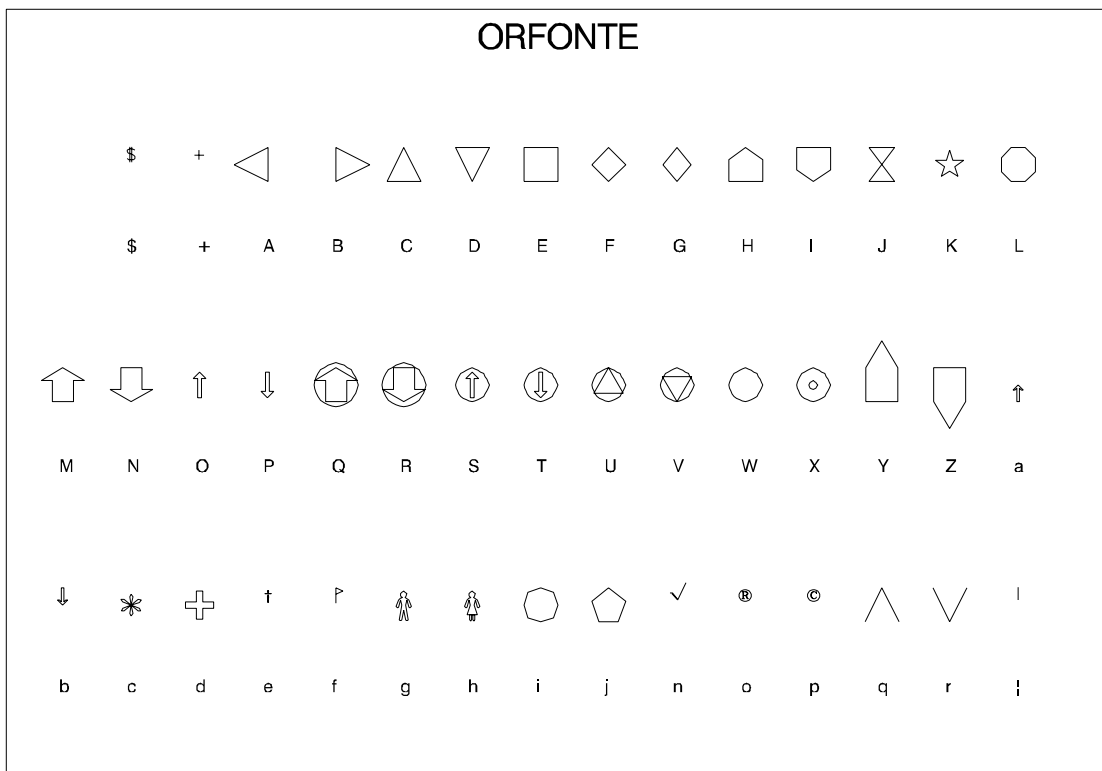


Figure 6.8. ORFONTE - An Empty Font

For example, to use a filled yellow “doghouse” symbol to represent milestones on the Gantt chart, specify the options

```
VMILE="H"  FMI=ORFONT  CMILE=YELLOW
```

in the CHART statement.

If you wish to represent a CHART variable with an empty blue “circled arrow,” then specify the following options in the corresponding SYMBOL statement.

```
V="Q"  F=ORFONTE  C=BLUE;
```

Specifying the Logic Options

The Logic options are a family of options used with the GANTT procedure that enable you to view the precedence relationships between activities on the Gantt chart. The Logic options constitute a high-resolution graphics feature and, as such, are only valid with specification of the GRAPHICS option in the PROC GANTT statement. The Logic options can accommodate nonstandard precedence relationships. The Logic options enable you to control the color, line style, and width of the connecting arcs as well as their layout and positioning on the Gantt chart. You can specify the precedence information required to draw the connections in one of two formats and store it in a data set different from the Schedule data set. You can also use the Schedule data set produced by PROC CPM to provide the precedence information. When using the Schedule data set from PROC CPM, you can ensure that all the relevant precedence information exists in the data set by either specifying the XFERVARS option in the PROC CPM statement or by using an ID statement.

The Logic options are not valid with the specification of either a BY statement or the COMBINE option in the CHART statement.

In order to invoke the logic options, you need to, minimally, specify a set of variables that defines the precedence relationships between tasks. This can be done using one of two formats for defining project networks, the AOA specification or the AON specification.

Activity-on-Arc (AOA) Specification

In the AOA specification, each activity of the project is represented by an arc. The node at the tail of the arc represents the start of the activity, and the node at the head of the arc represents the finish of the activity. The relationship between an activity and its successor is represented by setting the tail node of the successor arc to be the head node of the activity arc. One of the disadvantages of using the AOA method is that it cannot accommodate nonstandard lag types; all lag types are of the Finish-to-Start (FS) type.

The variables required by PROC GANTT to establish a valid AOA specification are defined using the HEADNODE= and TAILNODE= options in the CHART statement.

Activity-on-Node (AON) Specification

In the AON specification, each activity is represented by a node. All arcs originating from an activity terminate at its successors. Consequently, all arcs terminating at an activity originate from its predecessors.

The variables required by PROC GANTT to establish a valid AON specification are defined by the **ACTIVITY=** and **SUCCESSOR=** options in the **CHART** statement.

Optionally, nonstandard precedence relationships can be specified using the **LAG=** option in the **CHART** statement to define a variable that defines the lag type of a relationship.

Precedence Data Set

When using the **AON** specification, you can specify the precedence information using a data set different from the **Schedule** data set. This is particularly useful when producing several Gantt charts for the same project with different schedule information as would typically be the case when monitoring a project in progress. It eliminates the requirement that the precedence information exist in each Schedule data set and enables for more compact data. This separate data set is specified by the **PRECDATA=** option in the **PROC GANTT statement** and is referred to as the *Precedence data set*.

In order to graphically represent the precedence relationships derived from the Precedence data set on the Gantt chart, you must link the Precedence data set with the Schedule data set by means of a common variable. This common variable is selected as the **ACTIVITY** variable by virtue of the fact that it always exists in the Precedence data set. Thus, when using the Precedence data set, you need to ensure that the **ACTIVITY** variable exists in the Schedule data set, too.

In the event that both a valid **AOA** and a valid AON specification exist, PROC GANTT uses the AON specification by default. To override the default, use the **AOA option** in the **CHART** statement.

Drawing the Precedence Connections

The relationship between an activity and its successor is represented on the Gantt chart by a series of horizontal and vertical line segments that connect their schedule bars corresponding to a specified type (early/late, actual, and so forth). For a given connection, the intersection of a horizontal segment with a vertical segment is called a *turning point* of the connection. The type of the schedule bar used for the connection, also called the *logic bar*, is determined by the **LEVEL=** option in the **CHART** statement.

Every connection is comprised of either three or five segments and is termed a 3-segment or a 5-segment connection, respectively. The segments are routed in the following sequence:

- a) a horizontal segment that originates from the appropriate end of the logic bar corresponding to the activity. The length of this segment is controlled by the **MINOFFGV=** and **MININTGV=** options in the **CHART** statement.

- b) a vertical segment traveling from activity to the successor
- c) a horizontal segment traveling towards the appropriate end of the successor's logic bar. The length of this segment is determined by the **MINOFFLV=** and **MAXDISLV=** options in the **CHART** statement.
- d) a vertical and horizontal segment into the logic bar of the successor

Every connection begins with a horizontal line segment originating from the activity's logic bar and ends with a horizontal line segment terminating at the successor's logic bar. If the lag type of the relationship is **SS** or **SF**, the initial horizontal segment originates from the left end of the activity's logic bar, otherwise it originates from the right end of the logic bar. If the lag type of the relationship is **SS** or **FS**, the final horizontal segment terminates at the left end of the successor's logic bar, otherwise it terminates at the right end of the logic bar.

Note: The ends of the bars must be consistent with the lag type of the connection if it is to be drawn; that is, the left end of the activity's logic bar must represent a start time if an **SS** or **SF** lag type connection is to be drawn, and the right end of the activity's logic bar must represent a finish time if an **FS** or **FF** lag type connection is to be drawn.

Violation of these conditions is unlikely when using the Schedule data set generated by **PROC CPM**. An example violating these conditions is a Schedule data set containing incorrect or invalid data. The following example illustrates two observations that are in violation of these conditions. The first observation is invalid data (**E_START** greater than **E_FINISH**) while the second observation is incomplete (missing **E_START** and **L_FINISH** times).

E_START	E_FINISH	L_START	L_FINISH
03MAR04	01MAR04	.	.
.	05MAR04	07MAR04	.

The following figure illustrates two typical precedence connections between an activity and its successor.

ACTIVITY	SUCCESSOR	LAG
A	C	FS
B	C	FS

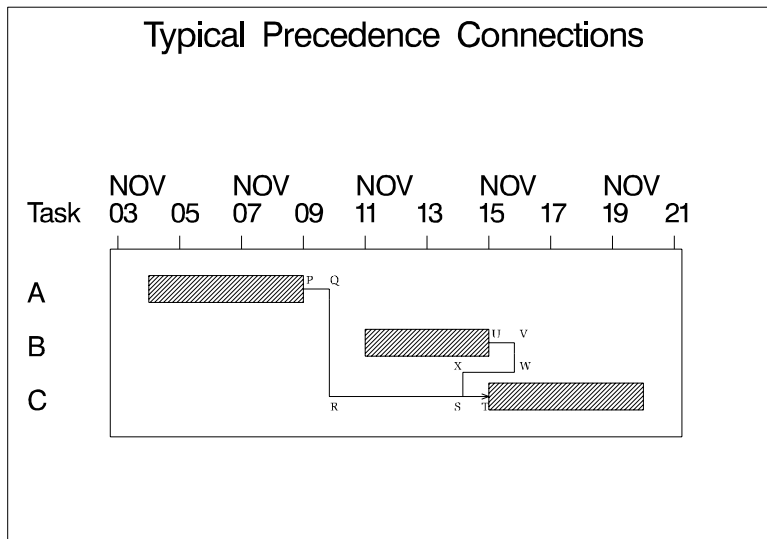


Figure 6.9. Typical Precedence Connections

The connection from activity **A** to activity **C** is comprised of three segments PQ, QR, and RT whereas the connection from activity **B** to activity **C** is made up of five segments UV, VW, WX, XS, and ST; the two additional segments correspond to the optional segments mentioned in item **d**) above. Points Q, R, V, W, X, and S are turning points.

Formatting the Axis

If neither `MINDATE=` nor `MAXDATE=` have been specified, the time axis of the Gantt chart is extended by a small amount in the appropriate direction or directions in an attempt to capture all of the relevant precedence connections on the chart. While this will succeed for the majority of Gantt charts, it is by no means guaranteed. If connection lines still tend to run off the chart, you can perform one or both of the following tasks.

- Use the `MINDATE=` or `MAXDATE=` options (or both) in the `CHART` statement to increase the chart range as necessary.
- Decrease the values of the `MINOFFGV=`, `MININTGV=`, `MAXDISLV=`, and `MINOFFLV=` options to reduce the horizontal range spanned by the vertical segments so that they will lie within the range of the time axis.

On the other hand, if the automatic extension supplied by `PROC GANTT` is excessive, you can suppress it by specifying the `NOEXTRANGE` option in the `CHART` statement.

The following section, “Controlling the Layout,” addresses the `CHART` statement options `MINOFFGV=`, `MININTGV=`, `MINOFFLV=`, and `MAXDISLV=` which control placement of the vertical segments that make up a connection. For most Gantt charts, default values of these options will suffice since their usage is typically reserved for “fine tuning” chart appearance. This section can be skipped unless you

want to control the layout of the connection. The description of the layout methodology and concepts is also useful to help you understand the routing of the connections in a complex network with several connections of different types.

Controlling the Layout

The concepts of global and local verticals are first introduced in order to describe the function of the segment placement controls.

Global Verticals

In the interest of minimizing clutter on the chart, each activity is assigned a maximum of two vertical tracks for *placement* of the vertical segment described in item **b)** above. One vertical track is maintained for SS and SF lag type connections and is referred to as the *start global vertical* of the activity, while the other vertical track is maintained for FS and FF lag type connections and is referred to as the *finish global vertical* of the activity. The term *global vertical* refers to either start global vertical or finish global vertical.

Note: The use of the term “global” is attributed to the fact that in any connection from an activity to its successor, the global vertical of the activity corresponds to the *only segment* that travels from activity to successor.

The following figure illustrates the two global verticals of activity **A**.

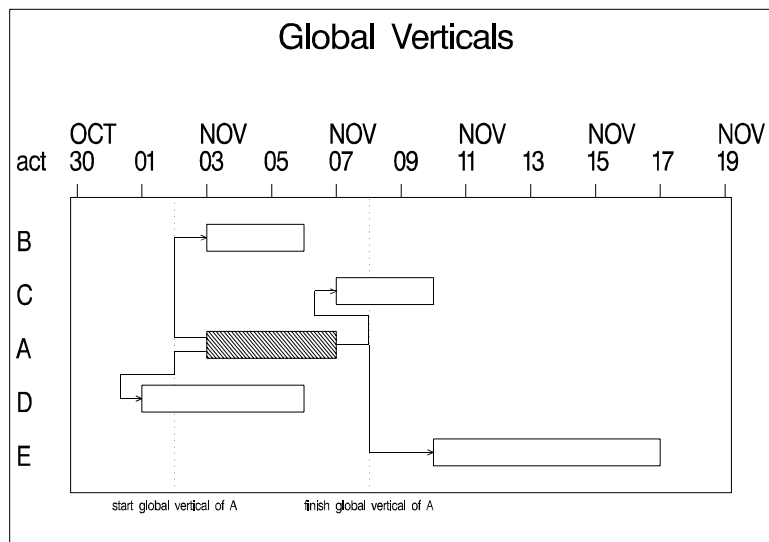


Figure 6.10. Global Verticals

Activity **A** has four successors: activities **B**, **C**, **D**, and **E**. The lag type of the relationship between **A** and **B** is nonstandard, namely ‘Start-to-Start’, as is that between **A** and **D**. The other two lag types are standard. The start and finish global verticals of activity **A** are represented by the two dotted lines. The vertical segments of the SS lag type connections from **A** to **B** and from **A** to **D** that are placed along the start global vertical of **A** are labeled PQ and RS, respectively. The vertical segments of the FS lag type connections from **A** to **C** and from **A** to **E** that are placed along the finish global vertical of **A** are labeled TU and UV, respectively.

For a given connection from activity to successor, the vertical segment that is placed on the activity global vertical is connected to the appropriate end of the logic bar by the horizontal segment described in item **a)** above. The minimum length of this horizontal segment is specified with the `MINOFFGV=` option in the `CHART` statement. Further, the length of this segment is affected by the `MININTGV=` option in the `CHART` statement, which is the minimum interdistance of any two global verticals. In [Figure 6.10](#), the horizontal segments QW and RX connect the vertical segments PQ and RS, respectively, to the logic bar and the horizontal segment YU connects both vertical segments TU and UV to the logic bar.

Local Verticals

Each activity has seven horizontal tracks associated with it, strategically positioned on either end of the logic bar, above the first bar of the activity, and below the last bar of the activity. These tracks are used for the *placement* of the horizontal segments described in items **c)** and **d)**, respectively.

[Figure 6.11](#) illustrates the positions of the horizontal tracks for an activity in a Gantt chart with four schedule bars. Three of the horizontal tracks, namely **track 1**, **track 4**, and **track 7**, service the start of the logic bar and are connected to one another by a vertical track referred to as the *Start Local Vertical*. Similarly, the horizontal tracks **track 2**, **track 3**, **track 5**, and **track 6** service the finish of the bar and are interconnected by a vertical track referred to as the *Finish Local Vertical*. The local verticals are used for *placement* of the vertical segment described in item **d)** above.

Note: The use of the term “local” is attributed to the fact that the local vertical is used to connect horizontal tracks associated with the *same* activity.

Notice that **track 1** and **track 7** terminate upon their intersection with the start local vertical and that **track 2** and **track 6** terminate upon their intersection with the finish local vertical.

The minimum distance of a local vertical from its respective bar end is specified with the `MINOFFLV=` option in the `CHART` statement. The maximum displacement of the local vertical from this point is specified using the `MAXDISLV=` option in the `CHART` statement. The `MAXDISLV=` option is used to offset the local vertical in order to prevent overlap with any global verticals.

Arrowheads are drawn by default on the horizontal tracks corresponding to the logic bar, namely **track 3**, **track 4**, and **track 5**, upon entering the bar and on continuing pages. The `NOARROWHEAD` option is used to suppress the display of arrowheads.

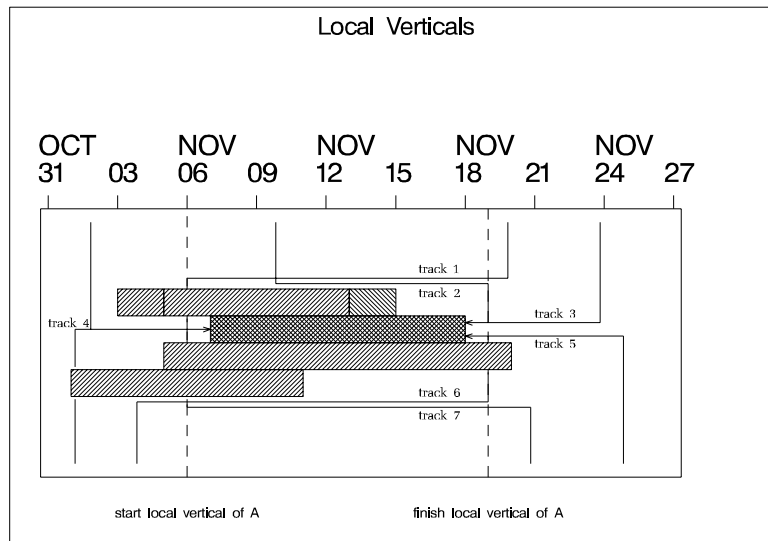


Figure 6.11. Local Verticals

Routing the Connection

The routing of the precedence connection from an activity to its successor is dependent on two factors, namely

- the horizontal displacement of the appropriate global vertical of the activity relative to the appropriate local vertical of the successor
- the vertical position on the task axis of the activity relative to the successor

The routing of a SS or FS type precedence connection from activity to successor is described below. A similar discussion holds for the routing of a SF or FF type precedence connection.

Suppose the activity lies above the successor. Let the start local vertical of the successor be denoted by s/v , and let the appropriate global vertical of the activity be denoted by gv .

CASE 1:

If gv lies to the left of s/v , then the connection is routed vertically down along gv onto **track 4** of the successor, on which it is routed horizontally to enter the bar. The resulting 3-segment connection is shown in [Figure 6.12](#).

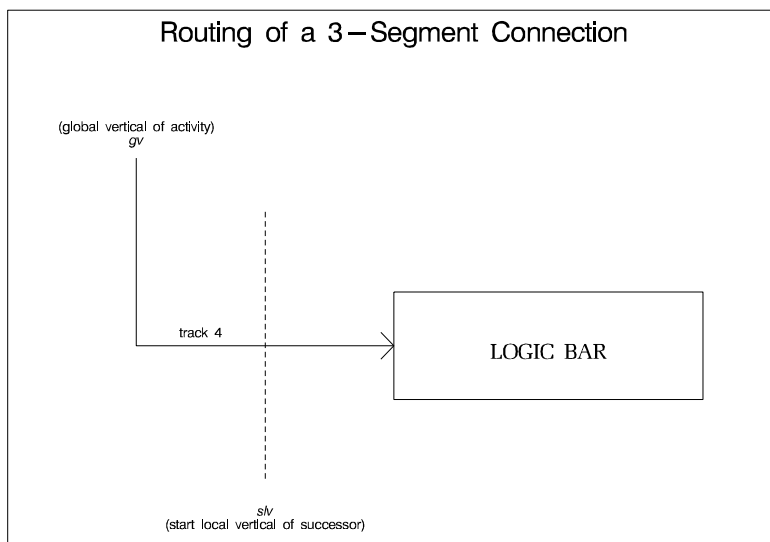


Figure 6.12. 3-Segment Connection

An example of this type of routing is illustrated by the connection between activities **A** and **C** in [Figure 6.9](#).

CASE 2:

If gv lies to the right of slv , then the connection is routed vertically down along gv onto **track 1** of the successor, horizontally to the left to meet slv , vertically down along slv onto **track 4** of the successor and horizontally to the right to enter the bar. The resulting 5-segment connection is shown in [Figure 6.13](#).

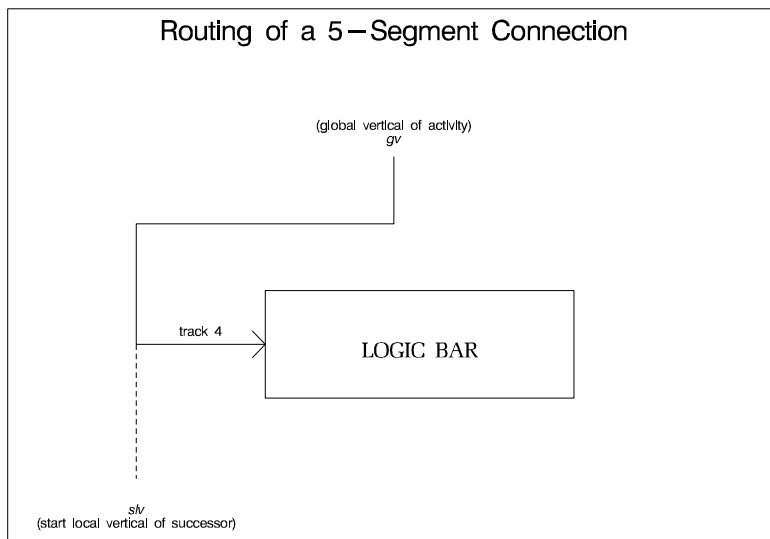


Figure 6.13. 5-Segment Connection

This type of routing is illustrated by the connection between activities **B** and **C** in [Figure 6.9](#).

An identical description applies when the activity lies below the successor, with the only difference being that **track 7** is used in place of **track 1** (see [Figure 6.11](#)).

Automatic Text Annotation

The automatic text annotation feature is designed specifically for labeling Gantt charts independently of the SAS/GRAPH Annotate facility. This facility enables you to display label strings with a minimum of effort and data entry while providing the capability for more complex chart labeling situations. Some of the properties that characterize this feature are

- the ability to tag labels. This enables you to define 1-1, 1-many, many-1, and many-many relationships.
- the ability to link label coordinates and label strings to variables in the Schedule data set. This enables the Label data set to remain unchanged even if the Schedule data set changes, such as when monitoring a project.
- the ability to automatically format or convert numeric variable values that have been specified for label text strings
- the ability to automatically split strings embedded with blanks to make the pieces as equal in length as possible, with the provision to override this behavior by specifying a split character
- the ability to mix data and percentage coordinates
- the ability to clip labels running off the frame of the Gantt chart

All relevant information is contained in a SAS data set specified using the **LABDATA=** data set option in the **PROC GANTT** statement. This data set is also referred to as the Label data set in the context of this documentation. The Label data set is required to contain certain variables in order to determine the label string and the positional information related to the string. At the very least, it requires three variables, one to determine the string to be displayed, one to determine the horizontal position, and one to determine the vertical position. The procedure terminates if it cannot find the required variables.

Determining the ...	requires the following variables
Label text string	_LVAR and/or _LABEL
Horizontal placement position	_XVAR and/or _X
Vertical placement position	LABVAR= and/or _Y

The **LABVAR** variable refers to the variable specified with the **LABVAR=** option in the **CHART** statement. It is the **LABVAR** variable that links the **Schedule** and **Label** data sets together. As far as possible, the procedure attempts to use the **_X**, **_Y**, and **_LABEL** variables in the Label data set. However, a link established using the **LABVAR** variable makes the Schedule data set a secondary source of information for determining positional and text string information for linked observations. The exact meaning of the preceding variables is explained later in this chapter.

Note that, other than the preceding requirements, there are no further restrictions on the Label data set. In fact, the Schedule data set can also be specified as the Label data

set as long as the required variables are present. There are several optional variables in the Label data set. These variables enable you to specify offsets in both horizontal and vertical directions from the given coordinate position; adjust graphical attributes such as baseline angles, character rotations, colors, fonts, and heights; control justification of strings; control placement behavior at pagebreaks; and specify coordinate reference systems for the horizontal and vertical values.

Label Data Set

You specify the Label data set using the `LABDATA=` option in the `PROC GANTT` statement. This initiates the labeling of the Gantt chart. The Label data set contains the information that provides the means of determining the label strings and their placement positions. As far as possible, the procedure attempts to use the `_X`, `_Y`, and `_LABEL` variables in the Label data set to extract the horizontal position, the vertical position, and the text string, respectively. The Schedule data set acts as a secondary source of information for all Label data set observations that are linked to it. The priority mechanism is described in the “[Determining the Vertical Position](#)” section on page 520.

Determining the Vertical Position

You can specify the vertical position for a label string in one of two ways, either directly by using the `_Y` variable in the Label data set or indirectly by associating the label with an activity or activities. In the latter case, the vertical position is determined by the relative position of the activity on the activity axis of the Gantt chart.

Directly using `_Y`

The procedure determines the vertical position using the `_Y` variable. You specify the coordinate system for the value of `_Y` with the optional `_YSYS` variable. A value of `DATA` or `DATAVAL` for the `_YSYS` variable indicates that the unit of measurement is data values. This is also the default coordinate system for `_Y`. A value of `PCT` or `PCTVAL` indicates that the unit of measurement is percentage of the procedure output area. When the coordinate system for `_Y` is based on data values, the values that `_Y` can take are restricted to positive real numbers with the exception of `-1`, which is a special value indicating that the label be displayed for every activity. In effect, this is a more concise way of linking a label to every activity.

Indirectly using `LABVAR=`

If the `_Y` variable does not exist or its value is missing, the procedure uses the value of the `LABVAR` variable to determine the vertical position of the label. If the `LABVAR=` option is specified and the value of the `LABVAR` variable is nonmissing, the observation is displayed for every activity that provides a matching value for the `LABVAR` variable. It is quite possible that there are no activities that provide a match, in which case the Label data set observation is ignored. Likewise, the Label data set observation is ignored if the value of the `LABVAR` variable is missing,

When the vertical position is based on an integer value for `_Y` or linkage using the `LABVAR` variable, the default position for the baseline of the string is the top of the first schedule bar corresponding to the activity (unless offsets `_XOFFSET` or `_YOFFSET` are used).

Determining the Horizontal Position

The procedure attempts to determine the horizontal position using the `_X` variable. You specify the coordinate system for the value of `_X` with the optional `_XSYS` variable. A value of `DATA` or `DATAVAL` for the `_XSYS` variable indicates that the unit of measurement is data values. This is also the default coordinate system for `_X`. A value of `PCT` or `PCTVAL` indicates that the unit of measurement is percentage of the procedure output area.

If the `_X` variable does not exist or its value is missing, the procedure ignores the Label data set observation if the observation is not linked to an activity in the Schedule data set. However, if the label is linked to an activity (either by the `LABVAR` variable or a value of `-1` for `_Y`, as described previously), the procedure extracts the horizontal position using the `_XVAR` variable in the Label data set. The `_XVAR` variable values are names of numeric variables in the Schedule data set. If the `_XVAR` value is not missing, the horizontal position is the value of the specified variable in the Schedule data set corresponding to the activity. If no such variable exists in the Schedule data set or its value is missing, no label is displayed for this particular (activity, label) link. As with the `_X` variable, the `_XSYS` variable names the unit of measurement for the associated Schedule data set variable.

Coordinate Systems

Coordinates can be specified in data values and percentages. It is important to note a significant difference between these two systems when using multiple pages. A data coordinate value is a point along either the time or activity axis, and it can be related to a page number and to a position on that page in the relevant direction. A percentage value, on the other hand, cannot be related to a particular page and, as such, is treated as applicable to every single page. It is possible to mix data and percentage coordinates. That is, the horizontal position can be in data values and the vertical position can be in percentage values, and vice versa. By mixing coordinate systems, you can get as flexible as you want in labeling Gantt charts.

- If both coordinates are in data values, the label is displayed at a specific coordinate on a specific page.
- If the horizontal coordinate is a percentage, the label is displayed at this horizontal position for every page that corresponds to the vertical position. Likewise, if the vertical position is a percentage, the label is displayed at this vertical position for every page that corresponds to the horizontal position. For example, you can display certain headings at the top of the Gantt chart or at the bottom of the Gantt chart by using a data value for the vertical position and a percentage value for the horizontal position.
- If the horizontal and vertical coordinates are both percentages, the label is displayed on every page at the specified coordinate. This feature can be used to display text that appears on every page, much like titles and footnotes, for example.

Determining the Label String

The technique for determining the label string is similar to that of determining the horizontal position.

As far as possible, the procedure attempts to use the `_LABEL` variable. If the `_LABEL` variable does not exist or its value is missing, the procedure ignores the label data observation if the observation is not linked to an activity in the `Schedule` data set. However, if the label is linked to an activity (either by the `LABVAR` variable or a value of -1 for `_Y`, as described previously), the procedure extracts the text string from the `Schedule` data set using the `_LVAR` variable. The `_LVAR` variable values are names of variables in the `Schedule` data set. If the `_LVAR` value is not missing, the text string is the value of the specified variable in the `Schedule` data set corresponding to the activity. If no such variable exists in the `Schedule` data set or if the value is missing, no label is displayed for this particular (activity, label) link.

Note that the `_LABEL` variable and the `Schedule` data set variables named by `_LVAR` are not restricted to be of character type. These variables can be character or numeric, formatted or unformatted. The strings are displayed using the following rules:

- If the variable is of character type, the label is the character string corresponding to the given activity.
- If the variable is of numeric type and formatted, the label is the formatted string.
- If the variable is of numeric type and unformatted, the label is the number displayed as a string with an integer part of up to `LABMAXINT=` digits and a maximum of `MAXDEC=` decimal positions. The `LABMAXINT=` and `MAXDEC=` options are specified in the `PROC GANTT` statement and their default values are 16 and 2, respectively.

Optional Information

In addition to specifying the horizontal and vertical coordinates as described previously, you can also specify a relative offset from these values using the `_XOFFSET` and `_YOFFSET` variables. These are optional variables and their default values are both 0. The unit of measurement for the `_XOFFSET` variable is in `MININTERVAL` units, and the direction of increase is from left to right. The unit of measurement for the `_YOFFSET` variable is in barheights, and the direction of increase is from top to bottom. When labels are split, the offset variables pertain only to the first piece of the label. The positions of the remaining split pieces are determined from the positioning of the first piece. The adjusted coordinate after taking the offsets into account is what is used for the placement of the string and is known as the referenced coordinate.

You can control the color and font of the label strings using the `_CLABEL` and `_FLABEL` variables, respectively. The values for the `_CLABEL` variable are any valid SAS/GRAPH color names. If the `_CLABEL` variable does not exist or its value is missing, the value of the `CTEXT=` option in the `CHART` statement is used. The values for the `_FLABEL` variable are any valid SAS/GRAPH font names. If the `_FLABEL` variable does not exist or its value is missing, the value of the `FONT=` option in the `CHART` statement is used.

You can control the height of the label strings with the `_HLABEL` variable. The units of measurement are in barheights. If the `_HLABEL` variable does not exist or its value is missing, the default value of 1 is used.

You can specify the angle of the character baseline with respect to the horizontal in degrees using the `_ALABEL` variable. If the `_ALABEL` variable does not exist or its value is missing, the default value of 0 is used. You can specify the rotation angle of each character in the string in degrees with the `_RLABEL` variable. If the `_RLABEL` variable does not exist or its value is missing, the default value of 0 is used.

You can control the alignment of the string with the `_JLABEL` variable. Strings can be displayed left-justified, right-justified, or centered at the specified coordinate. By default, all strings are displayed left-justified. The valid values are L or LEFT for left justification, R or RIGHT for right justification, and C or CENTER for centered justification.

The `_PAGEBRK` variable gives you displaying control when the referenced coordinate of a label coincides with a pagebreak tickmark and the horizontal coordinate is measured in data values. You can specify on which of the two pages you would like the label to be displayed. The default always displays the label on the first page associated with the common tickmark except when the tickmark is the very first tickmark on the Gantt chart. Valid values are 0 (default), 1 (use first page), or 2 (use second page).

Variables in the LABELDATA= data set

The following table lists all the variables associated with the [Label](#) data set and their interpretations by the GANTT procedure. The table also lists for each variable its type, the possible values it can assume, and its default value.

Table 6.26. Label Data Set Variables

Name	Type	Description	Allowed Values	Defaults
_Y	N	y position		
_X	N	x position		
_LABEL	C/N	label string		
_XVAR	C	name of numeric SAS var in DATA= ds for x position		
_LVAR	C	name of SAS var in DATA= ds for label string		
_XSYS	C	coordinate system for _X, _XVAR	DATA, DATAVAL, PCT, PCTVAL	DATA
_YSYS	C	coordinate system for _Y	DATA, DATAVAL, PCT, PCTVAL	DATA
_PAGEBRK	N	resolve pagebreak referenced display	0, 1, 2	0
_XOFFSET	N	horizontal offset in minintervals		0
_YOFFSET	N	vertical offset in bar heights		0
_ALABEL	N	baseline angle in degrees		0
_CLABEL	C	SAS/GRAPH color name		CTEXT=
_FLABEL	C	SAS/GRAPH font name		FONT=
_HLABEL	N	height in barheights		1
_JLABEL	C	justify text	L, LEFT, R, RIGHT, C, CENTER	L
_RLABEL	N	character rotation in degrees		0
LABVAR=	C/N	variable linking activities to labels		

Web-Enabled Gantt Charts

The **WEB** variable enables you to define an HTML reference for each activity. This HTML reference is currently associated with all the schedule bars, milestones, and ID variables that correspond to the activity. The **WEB** variable is a character variable, and the values need to be of the form “**HREF**=htmlpage.”

In addition, you can also store the coordinate and link information defined by the **WEB=** option in a SAS data set by specifying the **IMAGEMAP=** option in the **PROC GANTT** statement. By processing this SAS data set using a **DATA** step, you can generate customized HTML pages for your Gantt chart.

Mode-Specific Differences

All the options that are valid for line-printer, full-screen, and graphics mode Gantt charts are explained in detail in the “**Syntax**” section on page 454. With few exceptions, the options listed in the section “**General Options**” on page 462 have the same interpretation in all three modes.

Table 6.27 lists those line-printer options that have a different interpretation for the graphics version of **PROC GANTT**. **Table 6.28** lists options specific for graphics charts and the equivalent line-printer/full-screen option. **Table 6.29** lists options specific for line-printer and full-screen charts and the equivalent graphics option.

Table 6.27. Line-Printer Options and Corresponding Graphics Interpretation

Line-Printer Option	Graphics Mode Interpretation
SCALE= <i>scale</i>	one column is denoted by $(1/h)\%$ of the screen width, where HPOS= <i>h</i> .
SKIP= <i>skip</i>	<i>skip</i> number of bar heights are skipped between the bars for two consecutive activities. The value 0 is not valid in the graphics case.

Table 6.28. Graphics Mode Options and Line-Printer/Full-Screen Equivalent

Graphics Option/Statement	Line-Printer/Full-Screen Equivalent
LHCON= <i>linetype</i>	HCONCHAR='character'
LREF= <i>linetype</i>	REFCHAR='character'
LTNOW= <i>linetype</i>	TNCHAR='character'
NOFRAME	FORMCHAR='string'
PATTERN statement	JOINCHAR='string' and SYMCHAR='string'
SYMBOL statement	first character of variable name is plotted (See CHART specifications)
VMILE= <i>value</i>	MILECHAR='character'
WTNOW= <i>width</i>	TNCHAR='character'

Table 6.29. Line-Printer/Full-Screen Mode Specific Options

Line-Printer/Full-Screen Option	Graphics Equivalent
FORMCHAR='string'	NOFRAME
HCONCHAR='character'	LHCON= <i>linetype</i> , CHCON= <i>color</i>
HOLICHAR='character'	PATTERN statement 7
JOINCHAR='string'	PATTERN statements 1-6, 8, and 9
MILECHAR='character'	VMILE= <i>value</i> , FMILE= <i>font</i> , HMILE= <i>height</i> , CMILE= <i>color</i>
REFCHAR='character'	LREF= <i>linetype</i> , CREF= <i>color</i>
SYMCHAR='string'	PATTERN statements 1-6, 8, and 9
TNCHAR='character'	LTNOW= <i>linetype</i> , WTNOW= <i>width</i> , CTNOW= <i>color</i>

Displayed Output

The [GANTT](#) procedure produces one or more pages of displayed values and a plot of the schedule. If the [SUMMARY](#) option is specified, the chart is preceded by a detailed description of the symbols used. A legend is displayed at the foot of the chart on each page unless suppressed by the [NOLEGEND](#) option. The main body of the output consists of columns of the [ID](#) values and the Gantt chart of the schedule.

For each activity in the project, PROC GANTT displays the values of the ID variables in the ID columns and plots any combination of the following schedules: the predicted schedule as specified by the early and late start and finish times, the actual schedule as specified by the actual start and finish times, the resource-constrained schedule as specified by the resource-constrained start and finish times, and the baseline schedule as specified by the baseline start and finish times. The procedure

looks for default variable names for each of these times (E_START for early start, E_FINISH for early finish, S_START for resource-constrained start times, and so on), or you can explicitly specify the names of the appropriate variables using the ES=, EF=, LS=, ... options.

By specifying the COMBINE option in the CHART statement, you can request PROC GANTT to represent early, late, and actual schedule information on a single bar rather than use two separate bars (one for the early and late schedules and the other for the actual schedule.) PROC GANTT automatically draws a timenow line when the COMBINE option is specified with the property that all times to the left of the line represent the actual schedule times (that is, times that have already taken place) and all times to the right of the line represent the predicted early/late schedule times (times that have not yet taken place.)

Normally, each observation in the Schedule data set is assumed to denote a new activity, and a new set of ID values are displayed and the schedules corresponding to this activity are plotted on the chart. There are two exceptions to this rule:

- If the ID values for two or more consecutive observations are identical, only the first such observation is used.
- If there is a variable named SEGMENT_NO in the Schedule data set, PROC GANTT assumes that the data set contains observations for segments of activities that were split during resource-constrained scheduling. In accordance with the conventions used by PROC CPM, only observations with a missing value for SEGMENT_NO are assumed to denote a new activity. Further, the data are assumed to be sorted by SEGMENT_NO for each activity. For each activity, PROC GANTT plots the schedules corresponding to the ES, EF, LS, LF, AS, and AF variables on the basis of the first observation for this activity, namely the observation with a missing value for the SEGMENT_NO variable. This observation is also the one used for displaying values for the ID variables for this activity. If the activity is not split, this same observation is also the one used to plot the resource-constrained schedule as well as the baseline schedule. However, if the activity is split, then all the observations for this activity with integer values for the variable SEGMENT_NO are used to plot the resource-constrained schedule as disjoint segments on the line used for plotting the S_START and S_FINISH times. Furthermore, PROC GANTT plots the baseline schedule corresponding to the BS and BF variables based on the last such observation, namely the observation with the largest value for the SEGMENT_NO variable.

In addition to the schedules that are plotted, the Gantt chart also displays any variables specified in the CHART statement. Holidays, weekends, and breaks within a day are marked as appropriate. For details on how to specify holidays, weekends, and breaks within a day, see the “Multiple Calendars and Holidays” section on page 495. You can also represent zero duration activities with milestone symbols, draw a timenow line to reflect the current time of the project, draw horizontal connect lines, draw vertical reference lines, and group the activities by zones on the Gantt chart. It is important to note that all times are plotted at the start of the appropriate time period. Thus, if the chart starts on June 1, 2004, in column 15 of the page and the value of

E_START is '2JUN04,' MININTERVAL=DAY, and SCALE=5, then the early start time is plotted in column 20.

Each activity is identified by a job number (unless the NOJOBNUM option is used), which appears as the first column of activity text. The next column of activity text identifies the values of the ZONE= variable, if specified. This column can be suppressed by specifying the NOZONECOL option in the CHART statement. Next to appear are the ID variables in the order in which they are specified in the CHART statement. If the time axis of the chart is very wide, causing it to be divided across more than one page, the ID variables, by default, do not appear on continuation pages. You need to specify the IDPAGES option to produce the ID variable columns on every page. By default, if the ID variables occupy too much space, leaving no room for the chart to be started on the first page, they are omitted and a warning message is printed to the log. You can override this behavior by using the MAXIDS option. Column headings for the ZONE and ID variables consist of either variable labels (if they are present and if space permits) or variable names. To suppress variable labels in column headings, use the NOLABEL system option. If a ZONE or ID variable is formatted, the value is displayed using that format. If the CRITFLAG option is specified, a flag is displayed to the right of the ID values that indicates how critical the activity is. This flag is also repeated on continuation pages if the time axis occupies more than one page. The body of the chart starts to the right of this flag.

By default, the GANTT procedure is invoked in graphics mode. In graphics mode, you can fit the Gantt chart entirely on one page by specifying the COMPRESS option in the CHART statement. The HPAGES= and VPAGES= options take this one step further by enabling you to control the number of pages that you want the Gantt chart to be compressed into. The PCOMPRESS option behaves much like the COMPRESS option except that all compression is performed in a proportional manner, that is, by maintaining the aspect ratio of the Gantt chart.

PROC GANTT can display the precedence relationships (including nonstandard types) between activities on the Gantt chart by means of directed links between activities. Each link is drawn so as to convey the type of precedence relationship it represents. See the “Specifying the Logic Options” section on page 511 for a detailed description on how this can be done.

In addition, graphics mode provides you with the easy-to-use automatic text annotation facility to generate labels on the Gantt chart. You can link labels and their coordinates to variables in the schedule data set and also have complete control over all attributes such as font, color, angle, rotation, and so forth. You also have the additional capability of annotating text and graphics independently on the Gantt chart by using the SAS/GRAPH Annotate facility.

The GANTT procedure offers you a wide variety of options in addition to text, bar, symbol, and line formatting controls to customize your Gantt chart. These features enable you to create a wide variety of charts such as Logic Gantt charts, zoned Gantt charts, multiproject Gantt charts, Web-enabled Gantt charts, and multiprocess Gantt charts, to name but a few.

Macro Variable `_ORGANTT`

The `GANTT` procedure defines a macro variable named `_ORGANTT`, which is set at procedure termination. This variable contains a character string that indicates the status of the procedure and also provides chart specific information with respect to each Gantt chart produced by invocation of the `GANTT` procedure. This includes charts resulting from multiple `CHART` statements and `BY` groups.

The format of the `_ORGANTT` string for a `GANTT` procedure invocation with n `CHART` statements is as follows:

```
STATUS= REASON= CHART1 chart1info # ... CHARTn chartninfo #
```

where the value of `STATUS=` is either `SUCCESSFUL` or `ERROR_EXIT`, and the value of `REASON=` is one of the following:

- `BADDATA_ERROR`
- `MEMORY_ERROR`
- `IO_ERROR`
- `SEMANTIC_ERROR`
- `SYNTAX_ERROR`
- `GANTT_BUG`
- `UNKNOWN_ERROR`

The notation `chartiinfo` is a string of the form

```
SCALE= INCREMENT= SKIP= HPAGES= VPAGES= SEGNAME=
```

if there are no `BY` groups, and it is a string of the form

```
BY1 by1info: ... BYm byminfo:
```

where `byjinfo` is a string of the form

```
SCALE= INCREMENT= SKIP= HPAGES= VPAGES= SEGNAME=
```

if there are m `BY` groups. In other words, the macro contains an informational substring for every chart produced, using the symbol “#” as a `CHART` statement delimiter and the symbol “:” as a `BY` statement delimiter within `CHART` statements.

The chart specific information given in `_ORGANTT` is described below along with the identifying keyword preceding it. It should be noted that these values refer to those actually used in producing the chart and are not necessarily the same as those specified in the invocation of the procedure.

- `SCALE=` The value of scale
- `INCREMENT=` The value of increment
- `SKIP=` The value of skip
- `HPAGES=` The number of horizontal pages

- VPAGES= The number of vertical pages
- SEGNAME= The name of the first chart segment in graphics mode

Note: Some of the information may be redundant or predictable in certain display modes. For example, the value of SEGNAME= is empty in line-printer and full-screen modes. The values of HPAGES= and VPAGES= are equal to 1 in full-screen mode.

This information can be used when PROC GANTT is one step in a larger program that needs to determine whether the procedure terminated successfully or not. Because _ORGANTT is a standard SAS macro variable, it can be used in the ways that all macro variables can be used.

Computer Resource Requirements

There is no inherent limit on the size of the project that can be accommodated by the GANTT procedure. The number of activities in the Gantt chart is restricted only by the amount of memory available. Other memory-dependent factors are the type of Gantt chart required and the desired display mode.

Naturally, there needs to be a sufficient amount of core memory available in order to invoke and initialize the SAS System as well as to meet the memory requirements of the specific mode in which you invoke the procedure. For example, more memory is required when using high-resolution graphics than when using line-printer mode since the graphics sublibrary has to be loaded. As far as possible, the procedure attempts to store all the data in core memory. However, if there is insufficient core memory available for the entire project, the GANTT procedure resorts to the use of Utility data sets and swaps between core memory and Utility data sets as necessary.

The data storage requirement for the GANTT procedure is proportional to the number of activities in the project, and it depends on the number of schedule variables, the number of ID variables, and whether the Logic and Labeling options have been specified or not.

Examples

This section contains examples that illustrate several of the options and statements available with PROC GANTT in the different display modes. [Example 6.1](#) and [Example 6.2](#) illustrate the GANTT procedure in line-printer mode, and [Example 6.3](#) through [Example 6.27](#) illustrate the GANTT procedure in graphics mode.

Line-Printer Examples

[Example 6.1](#) shows how to obtain a basic line-printer Gantt chart using the default options. [Example 6.2](#) demonstrates how to use various options to customize the Gantt chart for the same project.

Example 6.1. Printing a Gantt Chart

This example shows how to use the GANTT procedure to obtain a basic line-printer Gantt chart using the default options. The following data describe the precedence relationships among the tasks involved in the construction of a typical floor in a multistory building. The first step saves the precedence relationships in a SAS data set. The variable `ACTIVITY` names each task, the variable `DUR` specifies the time it takes to complete the task in days, and the variables `SUCCESS1` to `SUCCESS4` specify tasks that are immediate successors to the task identified by the `ACTIVITY` variable.

PROC CPM determines the shortest schedule for the project that finishes before September 1, 2004. The solution schedule, saved in a SAS data set, is next sorted by the early start time before invoking the GANTT procedure to plot the schedule. Since the `DATA=` option is not specified, PROC GANTT uses the sorted data set to produce the schedule since it is the most recently created data set. The Gantt chart in [Output 6.1.1](#) is plotted on two pages because there are too many observations (29) to fit on one page. Note that the observations are split into two groups containing 15 and 14 observations, respectively, so that the chart size on each page is approximately equal. The time axis is labeled from June 21, 2004, to September 1, 2004, since these are the minimum and maximum dates in the Schedule data set. A legend is displayed at the bottom of the chart on each page.

```

title 'Gantt Example 1';
title2 'Printing a Gantt Chart';

data;
  format activity $20. success1 $20. success2 $20.
           success3 $20. success4 $20.;
  input activity dur success1-success4;
  datalines;
form          4 pour . . .
pour          2 core . . .
core         14 strip spray_fireproof insulate_walls .
strip        2 plumbing curtain_wall risers doors
strip        2 electrical_walls balance_elevator . .
curtain_wall  5 glaze_sash . . .
glaze_sash   5 spray_fireproof insulate_walls . .
spray_fireproof 5 ceil_ducts_fixture . . .
ceil_ducts_fixture 5 test . . .
plumbing     10 test . . .
test         3 insulate_mechanical . . .
insulate_mechanical 3 lath . . .
insulate_walls 5 lath . . .
risers       10 ceil_ducts_fixture . . .
doors        1 port_masonry . . .
port_masonry  2 lath finish_masonry . .
electrical_walls 16 lath . . .
balance_elevator 3 finish_masonry . . .
finish_masonry 3 plaster_marble_work . .
lath         3 plaster_marble_work . .
plaster      5 floor_finish tiling acoustic_tiles .
marble_work  3 acoustic_tiles . . .

```



```

acoustic_tiles      5 paint finish_mechanical . .
tiling              3 paint finish_mechanical . .
floor_finish       5 paint finish_mechanical . .
paint               5 finish_paint . . .
finish_mechanical  5 finish_paint . . .
finish_paint       2 caulking_cleanup . . .
caulking_cleanup   4 finished . . .
;

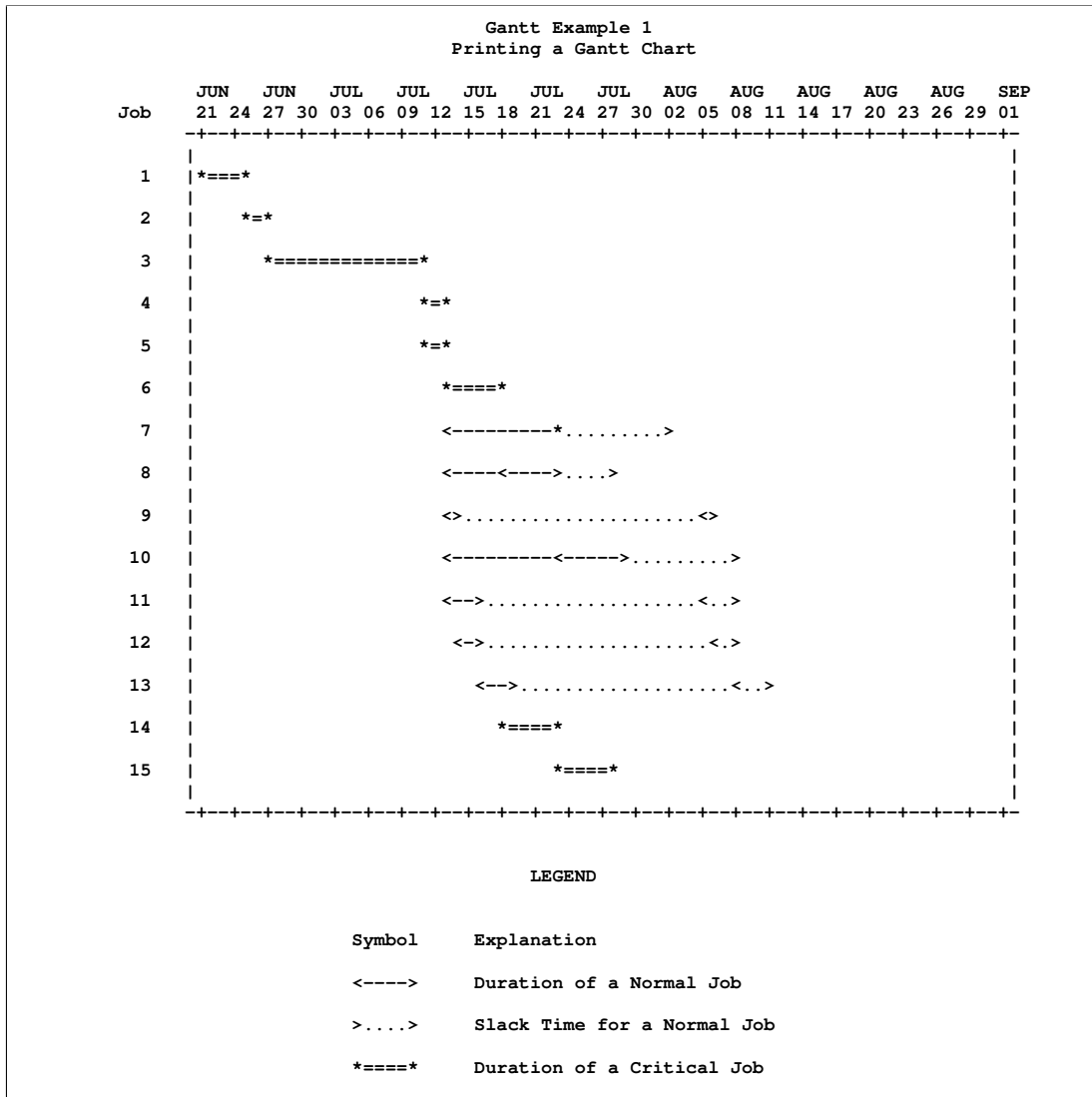
* invoke cpm to find the optimal schedule;
proc cpm finishbefore date='1sep04'd;
  activity activity;
  duration dur;
  successors success1-success4;
run;

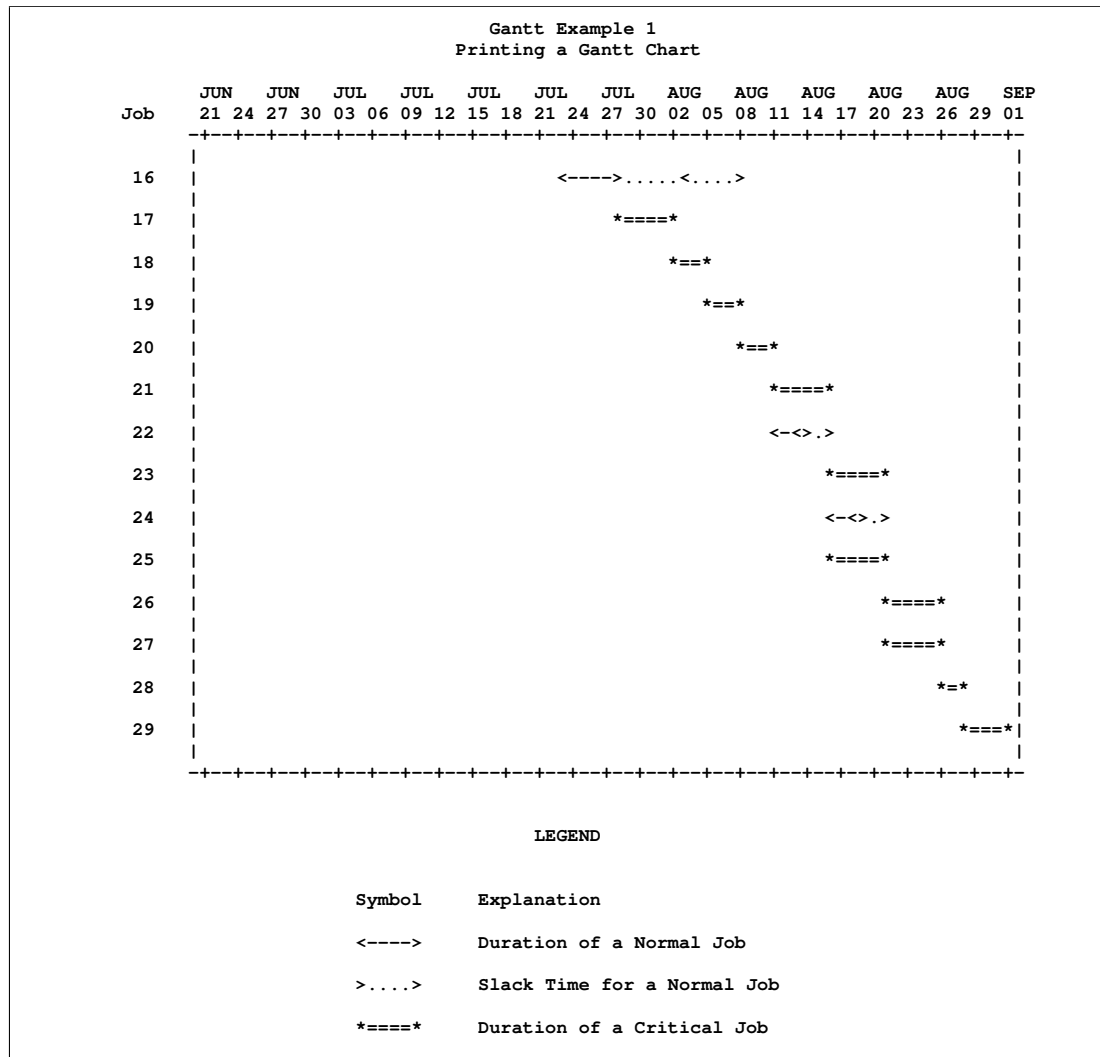
* sort the schedule by the early start date;
proc sort;
  by e_start;
run;

* invoke proc gantt to print the schedule;
proc gantt lineprinter;
  run;

```

Output 6.1.1. Printing a Gantt Chart





Example 6.2. Customizing the Gantt Chart

This example shows how to control the format of the Gantt chart using CHART statement options. The Schedule data set used by PROC GANTT is the same as that used in Example 6.1. Output 6.2.1 is on three pages; the first page contains a detailed description of the various symbols used by the procedure to plot the schedule. This description is produced by using the SUMMARY option. The next two pages contain the Gantt chart. The LINEPRINTER option invokes the procedure in line-printer mode. The FILL option causes the first page to be filled as completely as possible before the second page is started. Thus, the first page of the chart contains 20 activities while the second page contains only 8 activities.

The SKIP=2 specification causes two lines to be skipped between observations. The NOLEGEND option suppresses displaying of the legend, while the NOJOBNUM option causes job numbers to be omitted. The CRITFLAG option is used to produce the flag to the left of the main chart indicating if an activity is critical. Specifying BETWEEN=2 sets the number of columns between consecutive ID columns equal to

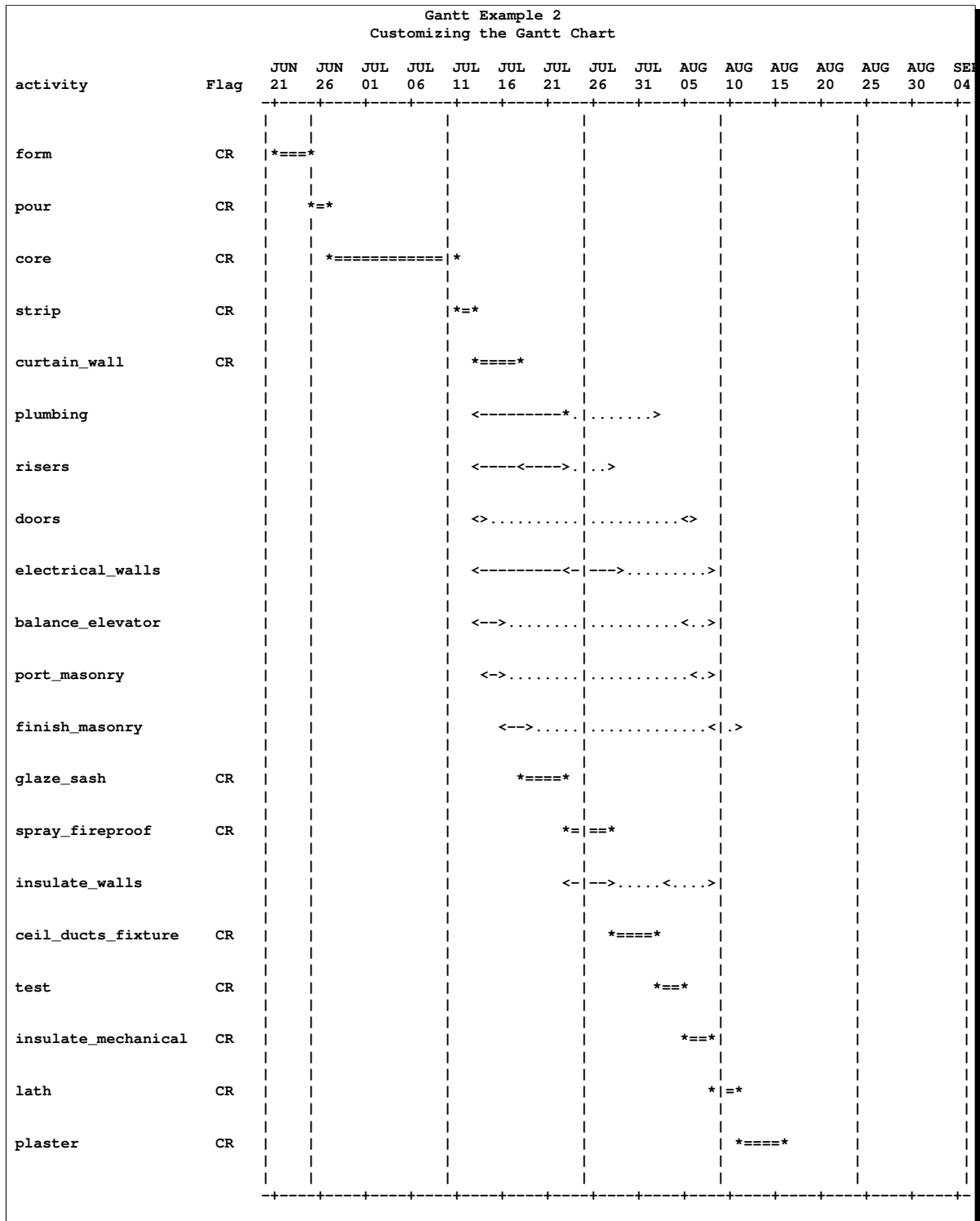
2. The REF= option produces the reference lines shown on the chart on the specified dates. The INCREMENT=5 specification indicates to the procedure that labels are to be displayed in increments of 5 units of the MININTERVAL= value, which by default is DAY. The ID statement is used to display the activity names to the left of the chart. The ID statement also causes the activity 'strip' to appear only once in the chart. Thus, there are only 28 activities in this chart instead of 29, as in [Example 6.1](#).

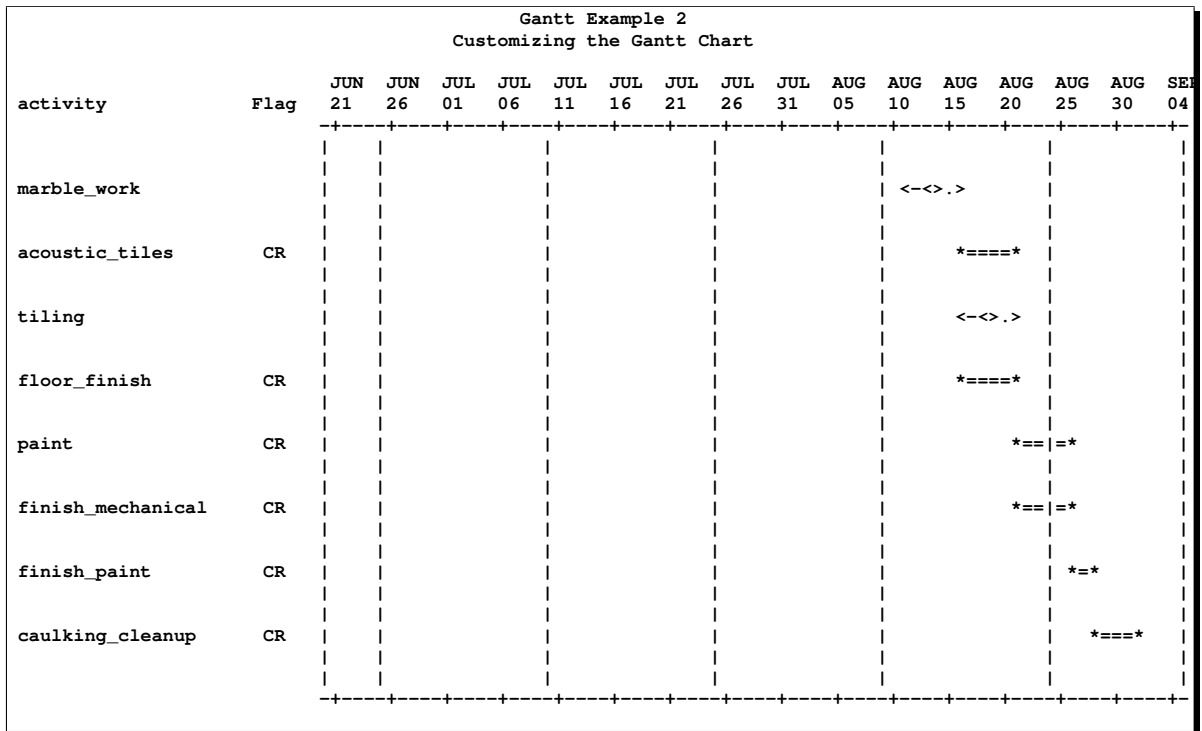
```
options ps=70;
title 'Gantt Example 2';
title2 'Customizing the Gantt Chart';

proc gantt lineprinter;
  chart / summary
    fill
    skip=2
    nolegend
    nojobnum critflag between=2
    ref='10jun04'd to '30aug04'd by 15
    increment=5;
  id activity;
run;
```

Output 6.2.1. Customizing the Gantt Chart

Gantt Example 2 Customizing the Gantt Chart			
Summary			
Symbols used for different times on the schedule			
Variable	Symbol	Variable	Symbol
E_START	<	L_START	<
E_FINISH	>	L_FINISH	>
Miscellaneous Symbols			
Symbol	Explanation		
|	Reference Line		
*	Overprint character when start or finish times coincide		
Symbols used for joining start and/or finish times			
Symbol	Explanation		
-	Duration of non-critical job		
.	Slack time for non-critical job		
=	Duration of critical job		
-	Slack time (neg.) for supercritical job		
*	Duration of supercritical job		
Some examples of typical strings			
String	Description		
<--->...<...>	Duration followed by slack time: early finish before late start		
<---<--->...>	Duration followed by slack time: early finish after late start		
<---*...>	Duration followed by slack time: early finish equals late start		
===	Duration of job on critical path		
<--->---<***>	Duration preceded by negative slack time for a supercritical job: late finish before early start		
<---<***>***>	Duration preceded by negative slack time for a supercritical job: late finish after early start		
<---****>	Duration preceded by negative slack time for a supercritical job: late finish equals early start		





Graphics Examples

The following examples illustrate the use of graphics options and the use of PATTERN and SYMBOL statements to produce high resolution graphics quality Gantt charts. In [Example 6.3](#), an extra input data set containing the holiday information is used to mark the holidays used in computing the schedule by PROC CPM. [Example 6.4](#) illustrates the use of the CHART statement to specify milestones and additional variables to be plotted on the chart. [Example 6.5](#) illustrates the use of the COMPRESS option to fit an entire Gantt chart on one page. [Example 6.6](#) illustrates the use of the MININTERVAL= and SCALE= options to control the width of the chart; this example also shows how the chart is divided and continued on the succeeding page when the time axis extends beyond one page. In [Example 6.7](#), the MINDATE= and MAXDATE= options are used to permit viewing of only a portion of the schedule in greater detail. [Example 6.8](#) uses the HOLIDUR= option in conjunction with the INTERVAL= option to mark holidays of varying lengths on the Gantt chart. [Example 6.9](#) illustrates the use of the CALENDAR and WORKDAY data sets to mark holiday information from different calendars on the chart.

In [Example 6.10](#), the actual schedule for each activity is plotted on a separate line in addition to the early and late schedules. [Example 6.11](#) illustrates tracking a project and comparing its progress against a baseline schedule. In [Example 6.12](#), the COMBINE option is used to concatenate the early, late, and actual schedules of a project in progress to produce a single concise schedule that retains all of the vital information of the former schedules. [Example 6.13](#) shows the resource-constrained schedule containing split segments of activities. The ability to bypass the project scheduler, PROC CPM, and directly specify the schedule information to

PROC GANTT is demonstrated in [Example 6.14](#). [Example 6.15](#) illustrates the use of the BY statement to obtain Gantt charts for different projects in a multiproject environment. In [Example 6.16](#), the GANTT procedure is used after some data manipulation steps to produce Gantt charts for individuals, each working on different subsets of activities in the project.

In [Example 6.17](#), the HEIGHT= and HTOFF= options are used to modify the text height in relation to the height of the activity bars. The next three examples show you how to invoke the different logic options in order to draw a Logic Gantt chart that displays the precedence relationships between activities. [Example 6.18](#) illustrates use of the ACTIVITY= and SUCCESSOR= options to specify the precedence information in AON format and the LEVEL= option to specify the bar type for the connections. In [Example 6.19](#), the routing control options MAXDISLV=, MAXOFFGV=, MAXOFFLV=, and MININTGV= are used in connection with a project that is specified in AOA format using the TAIL= and HEAD= options in the CHART statement. [Example 6.20](#) demonstrates the specification of nonstandard lag types using the LAG= option in the CHART statement. This example also illustrates use of the PRECDATA= option in the PROC GANTT statement. In [Example 6.21](#), the ANNOTATE= option is used to add graphics and text on a Gantt chart. [Example 6.22](#) illustrates the Automatic Text Annotation facility to label the Gantt chart independently of the SAS/GRAPH Annotate facility. In [Example 6.23](#) a PATTERN variable and a Label data set are used to generate Gantt charts for multiprojects. A very useful chart in project management and multiprocess environments is the multisegment Gantt chart. [Example 6.24](#) illustrates the use of the SEGMENT_NO variable and the PATTERN variable to produce a versatile multisegment Gantt chart. In [Example 6.25](#) the ZONE= option is used to produce a zoned Gantt chart. [Example 6.26](#) shows you how to produce a “Web-enabled” Gantt chart that you can use to drill-down your project. Finally, [Example 6.27](#) uses the CHARTWIDTH= option to produce Gantt charts that are consistent in appearance.

In all the examples presented, the early and late schedules are specified in the data set by means of the variables E_START, E_FINISH, L_START, and L_FINISH; hence, the ES=, EF=, LS=, and LF= options are not needed in the CHART statement. Unless otherwise specified, the pattern statements used in the examples are as follows:

```

pattern1 c=black v=x1; /* duration of a noncrit. activity */
pattern2 c=black v=l1; /* slack time for a noncrit. act. */
pattern3 c=black v=s; /* duration of a critical act. */
pattern4 c=black v=r1; /* slack time for a supercrit. act. */
pattern5 c=black v=x2; /* duration of a supercrit. act. */
pattern6 c=black v=x4; /* actual duration of an activity */
pattern7 c=black v=e; /* break due to a holiday */
pattern8 c=black v=x3; /* resource schedule of activity */
pattern9 c=black v=l2; /* baseline schedule of activity */

```

Example 6.3. Marking Holidays

This example uses the widget manufacturing project introduced in [Chapter 2](#), “[The CPM Procedure](#).” The data sets used in this example are the same as those used in [Example 2.8](#) to illustrate holiday processing in PROC CPM. The WIDGET data set

describes the project in AON format. The variable `TASK` identifies the activity and the variables `SUCC1`, `SUCC2`, and `SUCC3` identify the successors to `TASK`. The variable `DAYS` defines the duration of an activity. Another data set, `HOLIDAYS`, defines the holidays that need to be taken into account when scheduling the project. Although the `HOLIDAYS` data set contains three variables `HOLIDAY`, `HOLIFIN`, and `HOLIDUR`, the `HOLIDUR` variable is not used in this example. Thus, the Christmas holiday starts on December 24, 2003, and finishes on December 26, 2003. PROC CPM schedules the project to start on December 1, 2003, and saves the schedule in a data set named `SAVEH`. This data set is shown in [Output 6.3.1](#).

Next, the `GANTT` procedure is invoked with the specification of `HOLIDATA=HOLIDAYS` in the `PROC GANTT` statement and the `HOLIDAY=` and `HOLIEND=` options in the `CHART` statement, causing the Christmas and New Year holidays to be marked on the chart. The resulting Gantt chart is shown in [Output 6.3.2](#). Note that the procedure marks the duration of the holiday with the pattern corresponding to the seventh `PATTERN` statement. (See the “[Graphics Examples](#)” section beginning on page 537 for a list of the pattern statements used in the examples.) The `HPAGES=` option is used to fit the horizontal span of the chart on one page. The `SIMPLEX` font is used for all text by specifying the `FONT=` option in the `CHART` statement.

```
options ps=60 ls=100;

title 'Gantt Example 3';
title2 'Marking Holidays';

/* Activity-on-Node representation of the project */
data widget;
  format task $12. succ1-succ3 $12. ;
  input task & days succ1 & succ2 & succ3 & ;
  datalines;
Approve Plan    5 Drawings      Study Market  Write Specs
Drawings       10 Prototype
Study Market   5 Mkt. Strat.
Write Specs     5 Prototype
Prototype     15 Materials    Facility
Mkt. Strat.   10 Test Market  Marketing
Materials     10 Init. Prod.
Facility      10 Init. Prod.
Init. Prod.   10 Test Market  Marketing    Evaluate
Evaluate      10 Changes
Test Market   15 Changes
Changes       5 Production
Production    0 .
Marketing     0 .
;

data holidays;
  format holiday holifin date7.;
  input holiday & date7. holifin & date7. holidur;
  datalines;
24dec03 26dec03 4
```

```

01jan04 . . .
;

* schedule the project subject to holidays;
proc cpm data=widget holidata=holidays
    out=saveh date='1dec03'd ;
    activity task;
    succ    succ1 succ2 succ3;
    duration days;
    holiday holiday / holifin=(holifin);
run;

* sort the schedule by the early start date ;
proc sort;
    by e_start;
run;

* print the schedule;
proc print data=saveh;
    var task days e_start e_finish l_start l_finish
        t_float f_float;
run;

* plot the schedule;
proc gantt holidata=holidays data=saveh;
    chart / holiday=(holiday) holiend=(holifin)
        hpages=1 font=simplex;
    id task;
run;

```

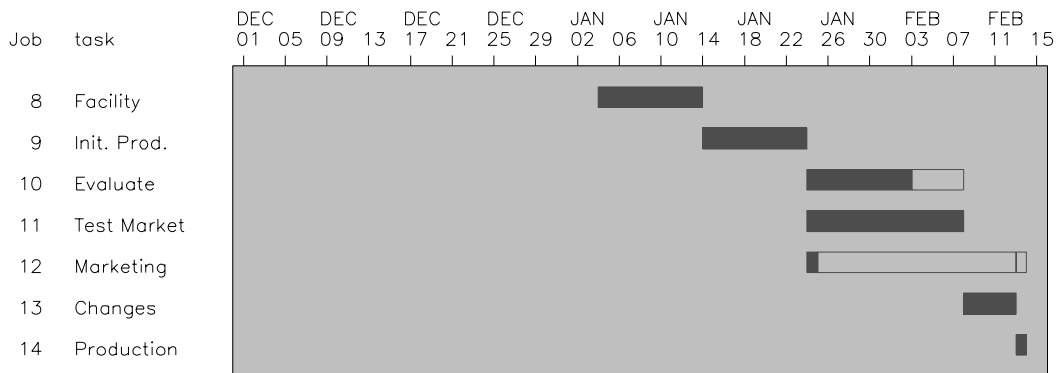
Output 6.3.1. Schedule Data Set SAVEH

Gantt Example 3 Marking Holidays								
Obs	task	days	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
1	Approve Plan	5	01DEC03	05DEC03	01DEC03	05DEC03	0	0
2	Drawings	10	06DEC03	15DEC03	06DEC03	15DEC03	0	0
3	Study Market	5	06DEC03	10DEC03	09JAN04	13JAN04	30	0
4	Write Specs	5	06DEC03	10DEC03	11DEC03	15DEC03	5	5
5	Mkt. Strat.	10	11DEC03	20DEC03	14JAN04	23JAN04	30	30
6	Prototype	15	16DEC03	03JAN04	16DEC03	03JAN04	0	0
7	Materials	10	04JAN04	13JAN04	04JAN04	13JAN04	0	0
8	Facility	10	04JAN04	13JAN04	04JAN04	13JAN04	0	0
9	Init. Prod.	10	14JAN04	23JAN04	14JAN04	23JAN04	0	0
10	Evaluate	10	24JAN04	02FEB04	29JAN04	07FEB04	5	5
11	Test Market	15	24JAN04	07FEB04	24JAN04	07FEB04	0	0
12	Marketing	0	24JAN04	24JAN04	13FEB04	13FEB04	20	20
13	Changes	5	08FEB04	12FEB04	08FEB04	12FEB04	0	0
14	Production	0	13FEB04	13FEB04	13FEB04	13FEB04	0	0

Output 6.3.2. Marking Holidays on the Gantt Chart

Gantt Example 3

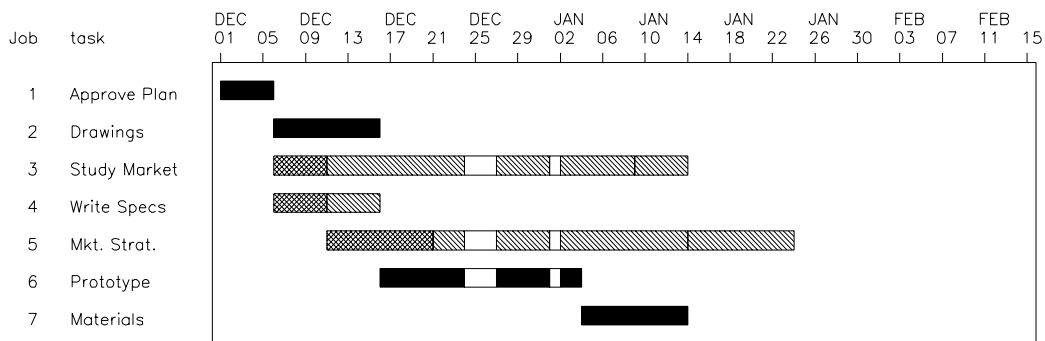
Marking Holidays



LEGEND:
 Duration of a Normal Job
 Duration of a Critical Job
 Slack Time for a Normal Job
 Break due to Holiday

Gantt Example 3

Marking Holidays



LEGEND:
 Duration of a Normal Job
 Duration of a Critical Job
 Slack Time for a Normal Job
 Break due to Holiday

Example 6.4. Marking Milestones and Special Dates

The widget manufacturing project described in [Example 6.3](#) has two activities with zero duration, namely ‘Production’ and ‘Marketing.’ By default, PROC GANTT pads finish times by a padding unit, thus these two activities are represented on the Gantt chart as having a duration equal to one day (see the “[Specifying the PADDING= Option](#)” section on page 492 for further information on padding). In other words, based on start and finish times alone, PROC GANTT cannot distinguish between activities that are one day or zero days long; it needs knowledge of the activity duration variable, which is specified using the DUR= option in the CHART statement, in order to represent zero duration activities by a milestone symbol.

Now, suppose that the Engineering department would like to finish writing up the specifications before Christmas and have the prototype ready by mid-January. In addition, the Marketing department would like to develop a marketing concept by the year’s end. The data set, TARGET, contains the target dates for these activities. This data set is merged with the WIDGET data set to produce the WIDGETT data set. The WIDGETT data set is then input to the CPM procedure, which is invoked with an ID statement to ensure that the variable TARGET is passed to the Schedule data set. After sorting the Schedule data set by the early start time, PROC GANTT is used to produce a Gantt chart of the resulting schedule. The Gantt chart is shown in [Output 6.4.1](#).

Before invoking PROC GANTT, you specify the required symbol using a SYMBOL statement. Specifying the variable TARGET in the CHART statement causes target dates to be marked on the chart with the symbol specified in the SYMBOL statement, a PLUS symbol in black. Specifying the DUR= option in the CHART statement causes zero duration schedules to be represented on the chart by the default milestone symbol, a filled diamond. To use a different milestone symbol, use the FMILE= and VMILE= options in the CHART statement. The duration and slack time of the activities are indicated by the use of the appropriate fill patterns as explained in the legend.

Colors for the milestone, axis, frame fill, and text are specified using the options CMILE=, CAXIS=, CFRAME=, and CTEXT=, respectively. The SIMPLEX font is used for all text by specifying the FONT= option in the CHART statement. The global options HPOS= and VPOS= are set to 120 and 40, respectively.

```
options ps=60 ls=100;

title f=swiss 'Gantt Example 4';
title2 f=simplex 'Marking Milestones and Special Dates';

proc cpm data=widgett date='1dec03'd;
  activity task;
  successor succ1-succ3;
  duration days;
  id target;
run;

* sort the schedule by the early start date ;
```

```

proc sort;
  by e_start;
run;

goptions hpos=120 vpos=40;

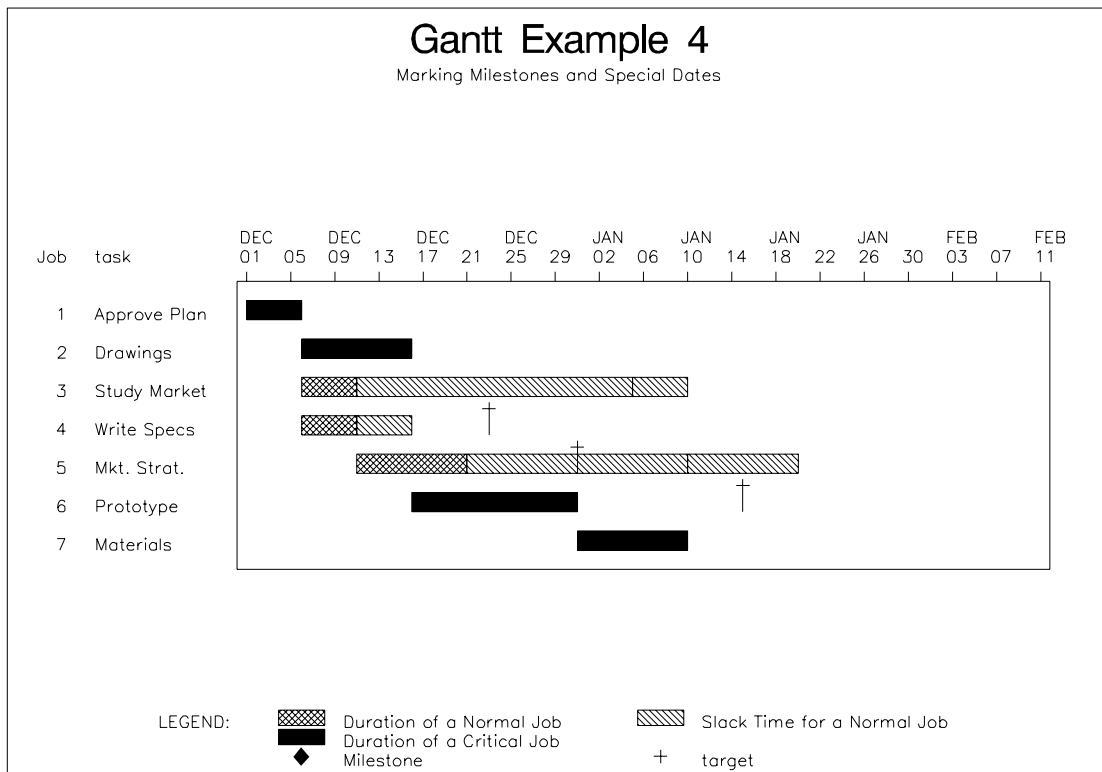
* set up required symbol statement;
symbol c=black v=plus;

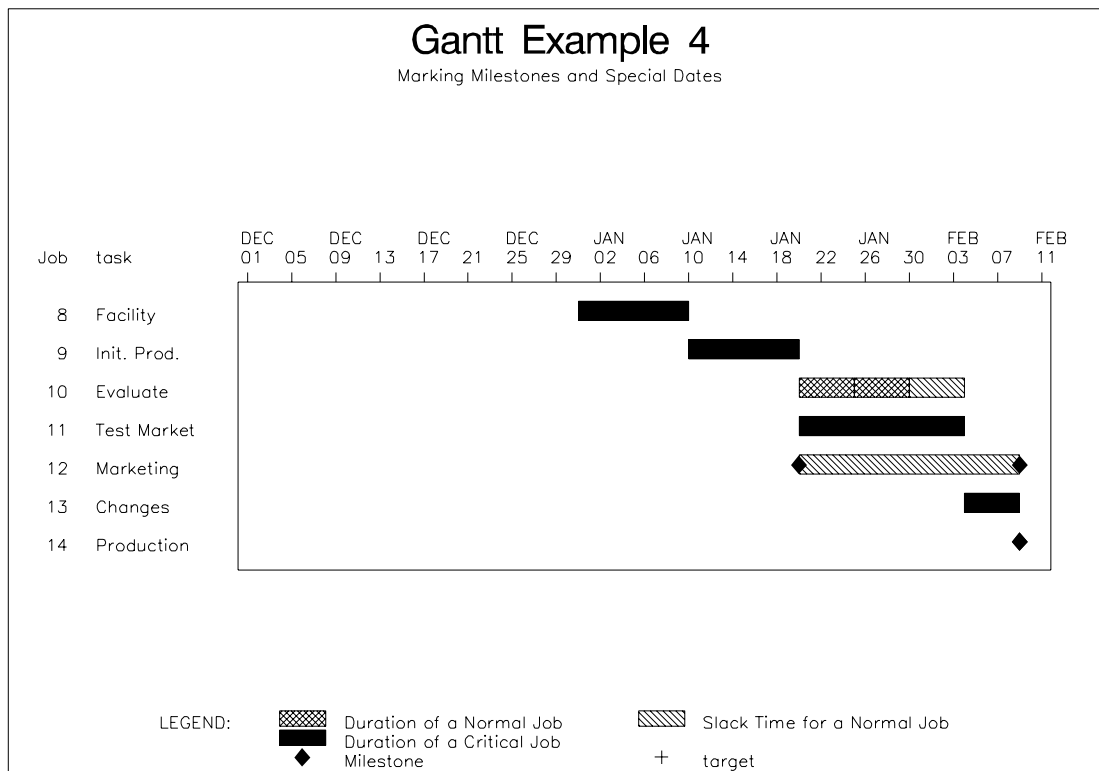
* plot the schedule;
proc gantt;
  chart target / dur=days cmile=cyan
                font=simplex ctext=blue
                caxis=cyan cframe=ligr;

  id task;
run;

```

Output 6.4.1. Marking Milestones and Special Dates in Graphics Mode





Example 6.5. Using the COMPRESS Option

In the previous example, PROC GANTT produced two pages of output since the chart would not fit on a single page. One way to ensure that the entire chart fits on a single page in graphics mode is to adjust the values of HPOS and VPOS accordingly. An easier way that is independent of the values of HPOS and VPOS is to specify the COMPRESS option in the CHART statement. [Output 6.5.1](#) shows the result of adding the COMPRESS option to the CHART statement in [Example 6.4](#). The PCOMPRESS option would have a similar effect but would maintain the aspect ratio as well. Some other options that can be used to control the number of pages generated are the HPAGES= and VPAGES= options.

```

title f=swiss 'Gantt Example 5';
title2 f=simplex 'Using the COMPRESS Option';

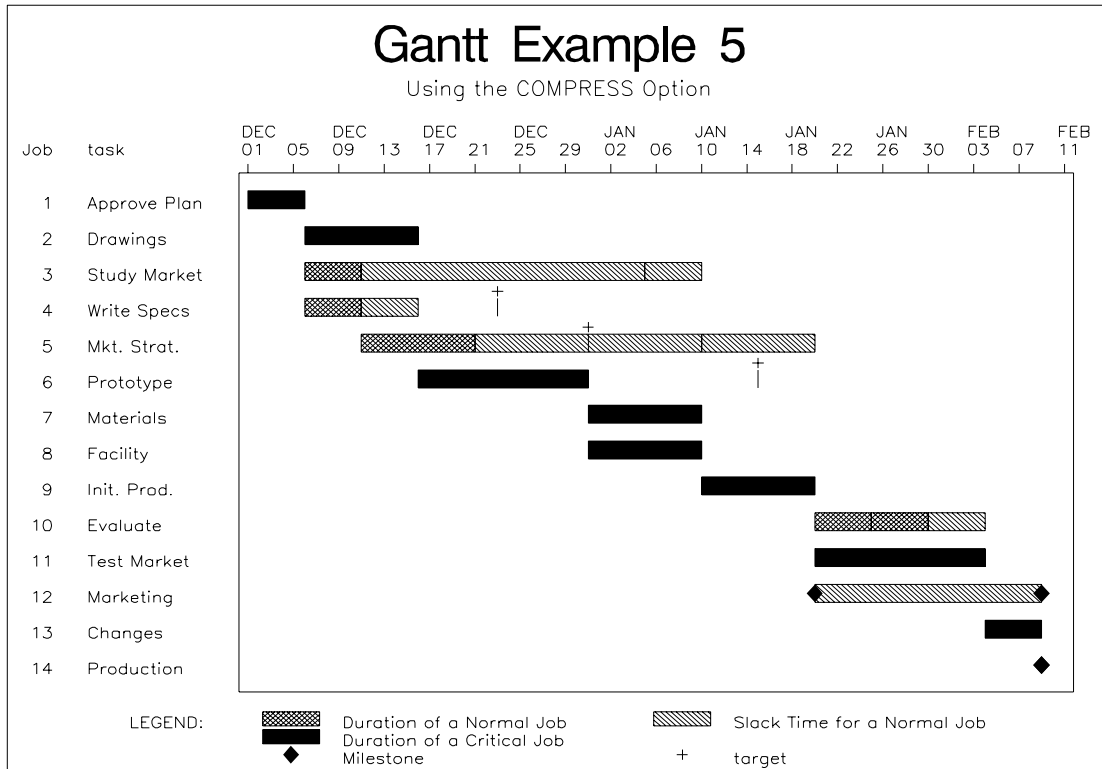
* plot the schedule on one page;

proc gantt;
  chart target / dur=days cmile=cyan
               font=simplex ctext=blue
               caxis=cyan cframe=ligr
               compress;

  id task;
run;

```

Output 6.5.1. Using the COMPRESS Option



Example 6.6. Using the MININTERVAL= and SCALE= Options

The data sets used for this example are the same as those used to illustrate PROC CPM in Example 2.2. The data set WIDGAOA defines the project using the AOA specification. The data set DETAILS specifies the abbreviated and detailed names for each of the activities in addition to the name of the department that is responsible for that activity. Notice that a dummy activity has been added to the project in order to maintain the precedence relationships established by the WIDGET data set of the previous two examples that define the same project in AON format. The two data sets WIDGAOA and DETAILS are merged to form the WIDGETA data set that is input as the Activity data set to PROC CPM. The data set SAVE produced by PROC CPM and sorted by E_START is shown in Output 6.6.1.

Because MININTERVAL=WEEK and SCALE=10, PROC GANTT uses (1000/h)% of the screen width to denote one week, where h is the value of HPOS. Note that this choice also causes the chart to become too wide to fit on one page. Thus, PROC GANTT splits the chart into two pages. The first page contains the ID variable as well as the job number while the second page contains only the job number. The chart is split so that the displayed area on each page is approximately equal. The SWISS font is used for all Gantt chart text by specifying the FONT= option in the CHART statement. The milestone color is changed to green using the CMILE= option. The resulting Gantt chart is shown in Output 6.6.2.

Output 6.6.1. Schedule Data Set SAVE

Gantt Example 6							
Using the MININTERVAL= and SCALE= Options							
descript	dept	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Finalize and Approve Plan	Planning	01DEC03	05DEC03	01DEC03	05DEC03	0	0
Prepare Drawings	Engineering	06DEC03	15DEC03	06DEC03	15DEC03	0	0
Analyze Potential Markets	Marketing	06DEC03	10DEC03	05JAN04	09JAN04	30	0
Write Specifications	Engineering	06DEC03	10DEC03	11DEC03	15DEC03	5	5
Develop Marketing Concept	Marketing	11DEC03	20DEC03	10JAN04	19JAN04	30	30
Build Prototype	Engineering	16DEC03	30DEC03	16DEC03	30DEC03	0	0
Procure Raw Materials	Manufacturing	31DEC03	09JAN04	31DEC03	09JAN04	0	0
Prepare Manufacturing Facility	Manufacturing	31DEC03	09JAN04	31DEC03	09JAN04	0	0
Initial Production Run	Manufacturing	10JAN04	19JAN04	10JAN04	19JAN04	0	0
Evaluate Product In-House	Testing	20JAN04	29JAN04	25JAN04	03FEB04	5	5
Mail Product to Sample Market	Testing	20JAN04	03FEB04	20JAN04	03FEB04	0	0
Begin Full Scale Marketing	Marketing	20JAN04	20JAN04	09FEB04	09FEB04	20	20
Production Milestone		20JAN04	20JAN04	20JAN04	20JAN04	0	0
Engineering Changes	Engineering	04FEB04	08FEB04	04FEB04	08FEB04	0	0
Begin Full Scale Production	Manufacturing	09FEB04	09FEB04	09FEB04	09FEB04	0	0

```
options ps=60 ls=100;
```

```
title f=swiss 'Gantt Example 6';
```

```
title2 f=swiss 'Using the MININTERVAL= and SCALE= Options';
```

```
data widgaoa;
```

```
format task $12. ;
```

```
input task & days tail head;
```

```
datalines;
```

```
Approve Plan    5    1    2
Drawings        10   2    3
Study Market    5    2    4
Write Specs      5    2    3
Prototype       15   3    5
Mkt. Strat.     10   4    6
Materials       10   5    7
Facility        10   5    7
Init. Prod.     10   7    8
Evaluate        10   8    9
Test Market     15   6    9
Changes         5    9   10
Production      0   10   11
Marketing       0    6   12
Dummy          0    8    6
```

```
;
```

```
data details;
```

```
format task $12. dept $13. descript $30.;
```

```
input task & dept & descript & ;
```

```
label dept = "Department"
```

```
descript = "Activity Description";
```

```
datalines;
```

```
Approve Plan    Planning      Finalize and Approve Plan
Drawings        Engineering   Prepare Drawings
Study Market    Marketing     Analyze Potential Markets
```


Write Specs	Engineering	Write Specifications
Prototype	Engineering	Build Prototype
Mkt. Strat.	Marketing	Develop Marketing Concept
Materials	Manufacturing	Procure Raw Materials
Facility	Manufacturing	Prepare Manufacturing Facility
Init. Prod.	Manufacturing	Initial Production Run
Evaluate	Testing	Evaluate Product In-House
Test Market	Testing	Mail Product to Sample Market
Changes	Engineering	Engineering Changes
Production	Manufacturing	Begin Full Scale Production
Marketing	Marketing	Begin Full Scale Marketing
Dummy	.	Production Milestone

;

```
data widgeta;
  merge widgaoa details;
run;
```

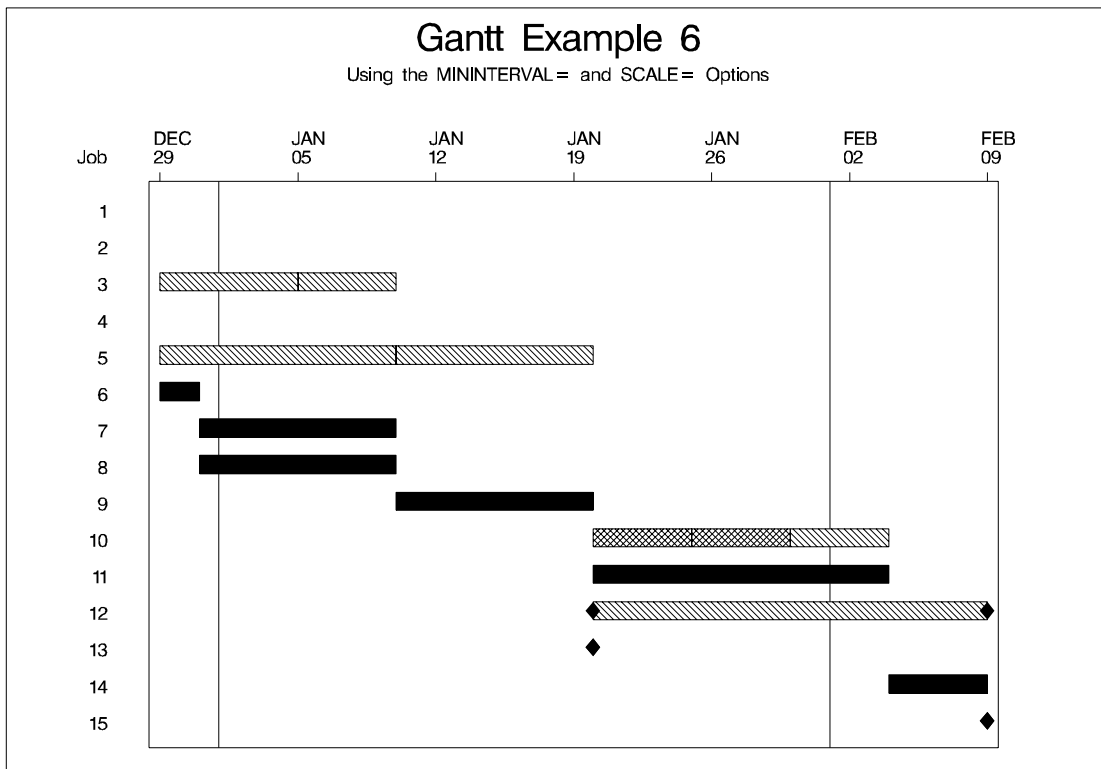
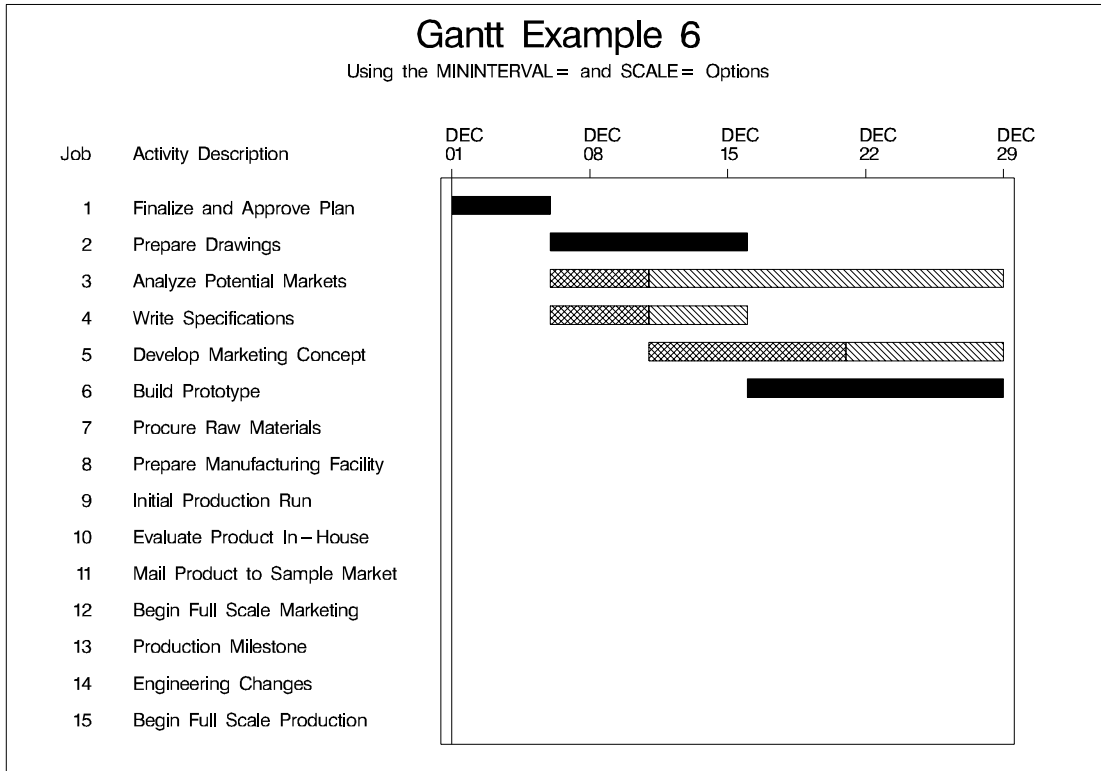
```
* schedule the project;
proc cpm data=widgeta date='1dec03'd out=save;
  tailnode tail;
  headnode head;
  duration days;
  id task dept descrpt;
run;
```

```
* sort the schedule by the early start date ;
proc sort;
  by e_start;
run;
```

```
goptions vpos=42 hpos=80;
```

```
* plot the schedule;
proc gantt;
  chart / mininterval=week scale=10
    dur=days cmile=green
    ref='1dec03'd to '1feb04'd by month
    font=swiss
    nolegend;
  id descrpt;
run;
```

Output 6.6.2. Using the MININTERVAL= and SCALE= Options in Graphics Mode



Example 6.7. Using the MINDATE= and MAXDATE= Options

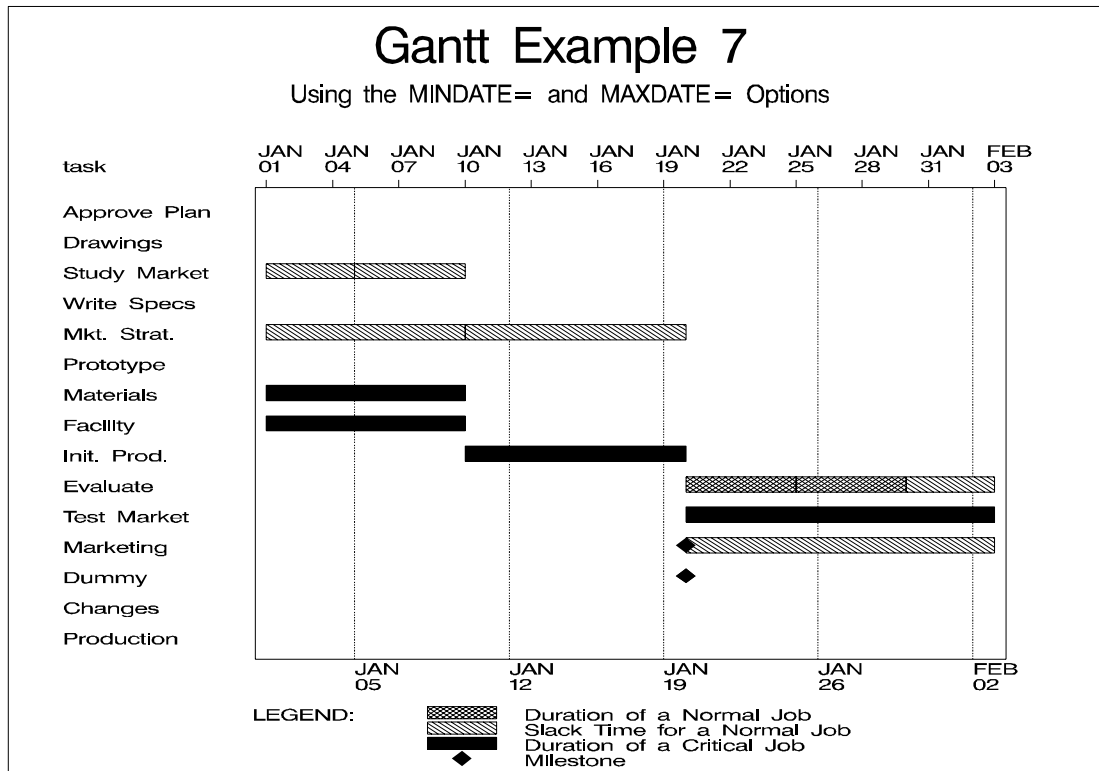
In this example, the SAVE data set from [Example 6.6](#) is used to display the schedule of the project over a limited time period. The start date and end date are specified by the MINDATE= and MAXDATE= options, respectively, in the CHART statement. As in [Example 6.5](#), the COMPRESS option is used to ensure that the region of the Gantt chart lying between January 1, 2004, and February 2, 2004, fits on a single page. The specification REF='5JAN04'D TO '2FEB04'D BY WEEK causes PROC GANTT to draw reference lines at the start of every week. Further, the reference lines are labeled using the REFLABEL option. The CREF= and LREF= options are specified in the CHART statement to indicate the color and line style, respectively, of the reference lines. The CFRAME= option is used to specify the color of the frame fill. The resulting Gantt chart is shown in [Output 6.7.1](#).

```
title f=swiss 'Gantt Example 7';
title2 f=swiss 'Using the MINDATE= and MAXDATE= Options';

goptions vpos=40 hpos=100;

* plot the schedule;

proc gantt data=save;
  chart / mindate='1jan04'd maxdate='2feb04'd
         ref='5jan04'd to '2feb04'd by week
         refflabel cref=black lref=2
         cframe=cyan
         dur=days font=swiss nojobnum
         compress;
  id task;
run;
```

Output 6.7.1. Using the MINDATE= and MAXDATE= Options in Graphics Mode**Example 6.8. Variable Length Holidays**

This example shows how you can mark vacation periods that last longer than one day on the Gantt chart. This can be done by using the HOLIDUR= option in the CHART statement. Recall that holiday duration is assumed to be in *interval* units where *interval* is the value specified for the INTERVAL= option. The project data for this example are the same as the data used in the previous example. Suppose that in your scheduling plans you want to assign work on all days of the week, allowing for a Christmas vacation of four days starting from December 24, 2003, and a day off on January 1, 2004 for the New Year. The data set HOLIDAYS contains the holiday information for the project. First, the project is scheduled with INTERVAL=DAY so that the holidays are on December 24, 25, 26, and 27, 2003, and on January 1, 2004. PROC GANTT is invoked with INTERVAL=DAY to correspond to the invocation of PROC CPM. The resulting Gantt chart is shown in [Output 6.8.1](#).

```

title f=swiss 'Gantt Example 8';
data holidays;
  format holiday holifin date7.;
  input holiday & date7. holifin & date7. holidur;
  datalines;
24dec03 27dec03 4
01jan04 . .
;

* schedule the project subject to holidays;

```

```

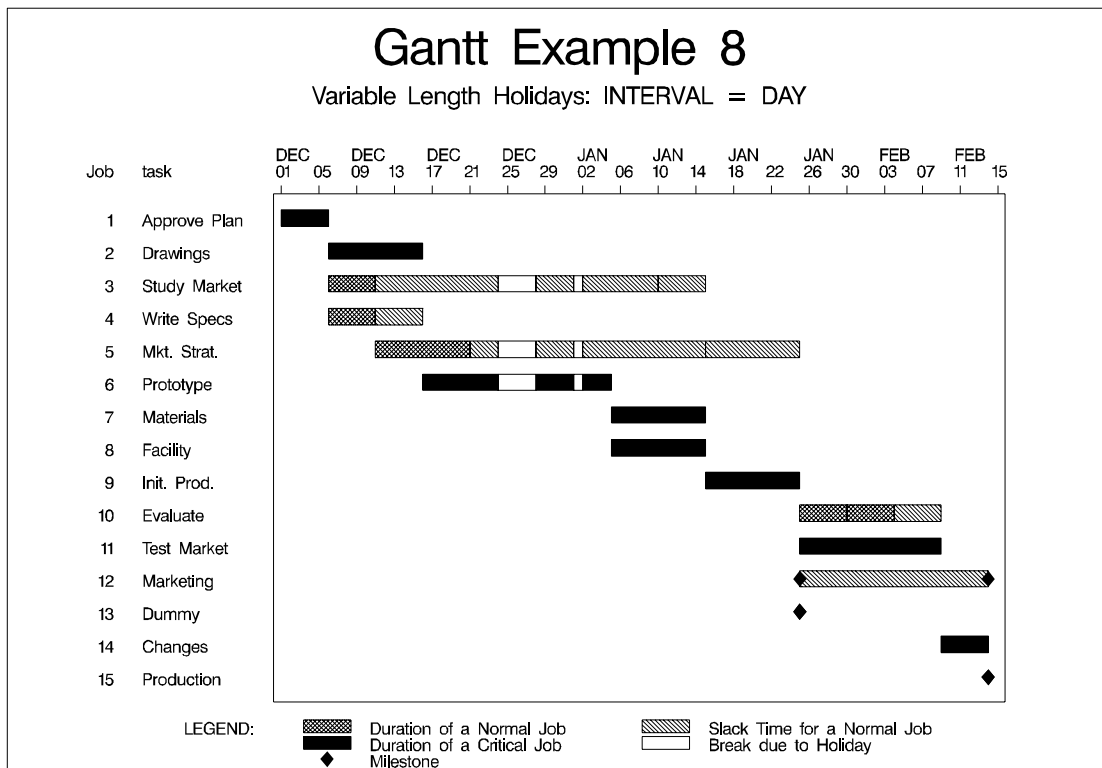
proc cpm data=widgeta holidata=holidays out=sched1
    date='1dec03'd interval=day;
    tailnode tail;
    headnode head;
    duration days;
    id task dept descrpt;
    holiday holiday / holidur=(holidur);
run;

* sort the schedule by the early start date ;
proc sort;
    by e_start;
run;

* plot the schedule;
title2 'Variable Length Holidays: INTERVAL=DAY';
proc gantt holidata=holidays data=sched1;
    chart / holiday=(holiday) holidur=(holidur)
           interval=day
           dur=days
           pcompress;
    id task;
run;

```

Output 6.8.1. Variable Length Holidays: INTERVAL=DAY



Next, consider the same project and Holiday data set, but invoke PROC CPM with INTERVAL=WEEKDAY. Then, the value '4' specified for the variable HOLIDUR is interpreted as 4 weekdays. The holidays are on December 24, 25, 26, and 29, 2003,

and on January 1, 2004, because December 27 and 28 (Saturday and Sunday) are non-working days. The same steps are used as previously, except that INTERVAL is set to WEEKDAY instead of DAY in both PROC CPM and PROC GANTT. Suppose that the resulting data set is saved as SCHED2. The following invocation of PROC GANTT produces [Output 6.8.2](#). Note that the use of INTERVAL=WEEKDAY causes weekends to be also marked on the chart.

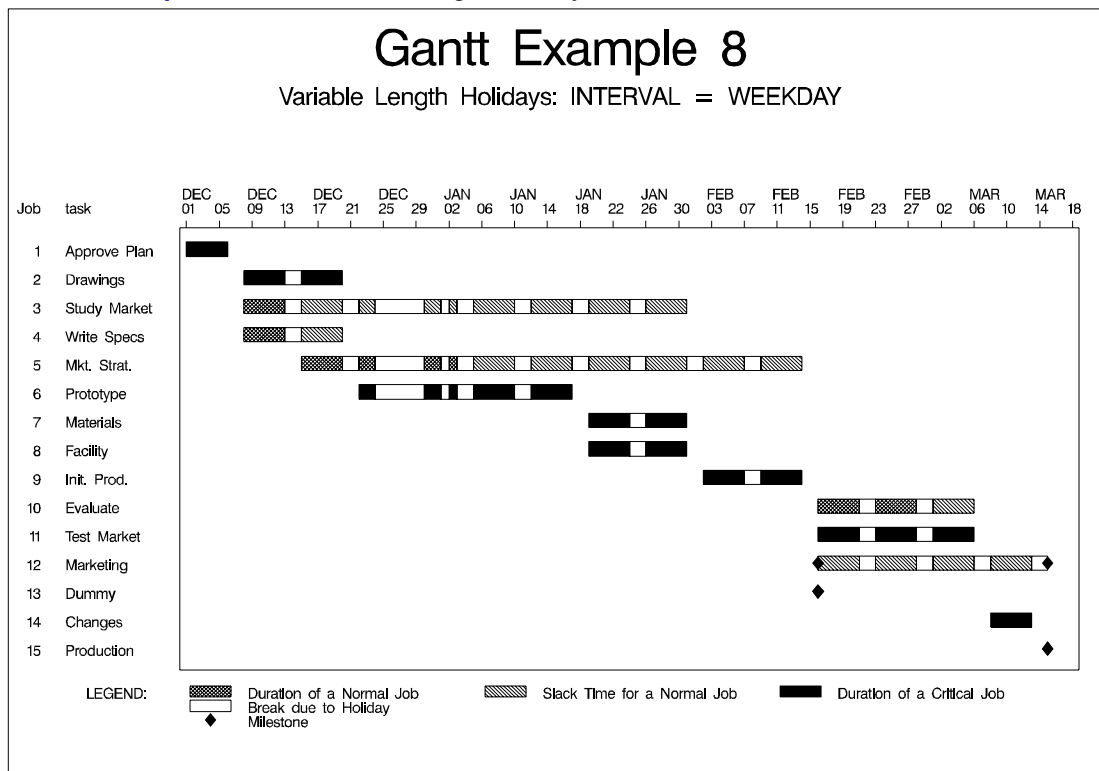
```

title2 'Variable Length Holidays: INTERVAL=WEEKDAY';

proc gantt holidata=holidays data=sched2;
  chart / holiday=(holiday) holidur=(holidur)
        interval=weekday
        dur=days
        pcompress;
  id task;
run;

```

Output 6.8.2. Variable Length Holidays: INTERVAL=WEEKDAY



Finally, when the INTERVAL= option is specified as WORKDAY, the workday is assumed to be from 9:00 a.m. to 5:00 p.m., and the Christmas holiday period begins at 5:00 p.m. on December 23, 2003, and ends at 9:00 a.m. on December 30, 2004. PROC GANTT is invoked with the MARKBREAK option and MININTERVAL=DTHOUR so that all breaks during a day can be seen. Because the SCALE= option is not specified, each column denotes one hour of the schedule. Since the project duration is several days long, the entire Gantt chart would be spread across many pages. Simply specifying the COMPRESS or PCOMPRESS option will

not be of much help since the text would be barely legible owing to the extent of the scaling. Hence, only a portion of the Gantt chart is shown in [Output 6.8.3](#) using the MINDATE= and MAXDATE= options. Note that the Gantt chart is labeled with the date as well as the time values on the time axis.

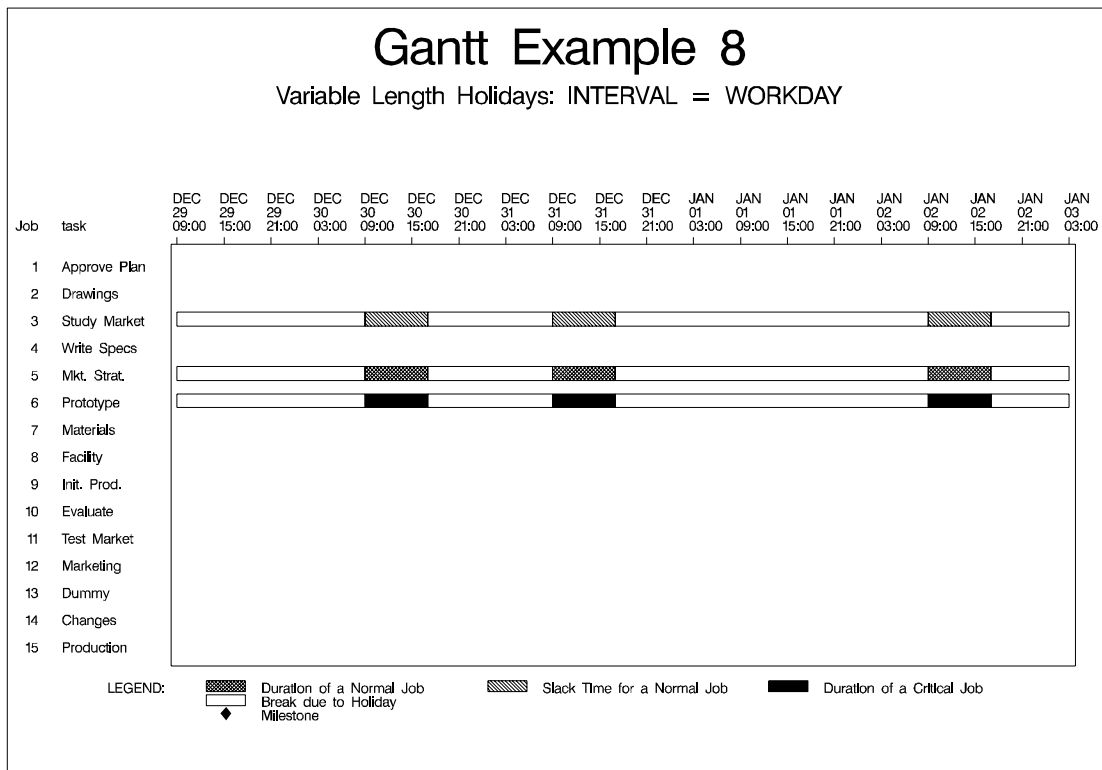
```

title2 'Variable Length Holidays: INTERVAL=WORKDAY';

proc gantt holiday=holidays data=sched3;
  chart / holiday=(holiday) holidur=(holidur)
        interval=workday
        dur=days
        mininterval=dthour markbreak
        mindate='29dec03:09:00:00' dt
        maxdate='03jan04:00:00:00' dt
        pcompress;
  id task;
run;

```

Output 6.8.3. Variable Length Holidays: INTERVAL=WORKDAY



Example 6.9. Multiple Calendars

This example illustrates the use of multiple calendars within a project. The data for this example are the same as the data used in [Example 2.10](#) to illustrate the CPM Procedure. The input data sets to PROC CPM are displayed in [Output 6.9.1](#). The WORKDATA data set defines several shift patterns, which in turn are identified with four different calendars in the CALEDATA data set:

- The 'DEFAULT' calendar has five 8-hour workdays (8 a.m. - 4 p.m.) on Monday through Friday and holidays on Saturday and Sunday.
- The 'OVT_CAL' calendar defines the "overtime" calendar that is followed by the Engineering department to build the prototype. The 'OVT_CAL' calendar has five 10-hour workdays (8 a.m. - 6 p.m.) on Monday through Friday, a 4-hour halfday (8 a.m. - 12 noon) on Saturday and a holiday on Sunday.
- The 'PROD_CAL' calendar defines the "production" calendar that is used for full-scale production of the widget. The 'PROD_CAL' calendar consists of continuous work from Monday 8 a.m. through Saturday 6 p.m. except for two 2-hour breaks per day from 6 a.m. to 8 a.m. and from 6 p.m. to 8 p.m. Thus, 'PROD_CAL' is made up of eleven 8-hour shifts per week; six day shifts and five night shifts.
- The 'Eng_cal' calendar defines the calendar followed by the Engineering department for writing the specifications for the prototype. The 'Eng_cal' calendar has the same work pattern as the default calendar with an extra holiday period of seven days starting on December 8, 2003.

The HOLIDATA data set defines the appropriate holidays for the different calendars. The project data set WIDGVAC includes a variable named CAL to identify the appropriate calendar for each activity.

Output 6.9.1. Multiple Calendars: Data Sets

Multiple Calendars							
Workdays Data Set							
Obs	fullday	halfday	ovtday	s1	s2	s3	
1	8:00	8:00	8:00	.	8:00	.	
2	16:00	12:00	18:00	6:00	18:00	6:00	
3	.	.	.	8:00	20:00	8:00	
4	.	.	.	18:00	.	18:00	
5	.	.	.	20:00	.	.	
6	.	.	.	.	.	.

Calendar Data Set								
Obs	cal	_sun_	_mon_	_tue_	_wed_	_thu_	_fri_	_sat_
1	DEFAULT	holiday	fullday	fullday	fullday	fullday	fullday	holiday
2	OVT_CAL	holiday	ovtday	ovtday	ovtday	ovtday	ovtday	halfday
3	PROD_CAL	holiday	s2	s1	s1	s1	s1	s3
4	Eng_cal							

Holidays Data Set				
Obs	holiday	holifin	holidur	cal
1	08DEC03	.	7	Eng_cal
2	24DEC03	26DEC03	.	
3	01JAN04	01JAN04	.	

Project Data Set						
Obs	task	succ1	succ2	succ3	days	cal
1	Approve Plan	Drawings	Study Market	Write Specs	5.5	DEFAULT
2	Drawings	Prototype			10.0	DEFAULT
3	Study Market	Mkt. Strat.			5.0	DEFAULT
4	Write Specs	Prototype			4.5	Eng_cal
5	Prototype	Materials	Facility		15.0	OVT_CAL
6	Mkt. Strat.	Test Market	Marketing		10.0	DEFAULT
7	Materials	Init. Prod.			10.0	DEFAULT
8	Facility	Init. Prod.			10.0	DEFAULT
9	Init. Prod.	Test Market	Marketing	Evaluate	10.0	DEFAULT
10	Evaluate	Changes			10.0	DEFAULT
11	Test Market	Changes			15.0	DEFAULT
12	Changes	Production			5.0	DEFAULT
13	Production				0.0	PROD_CAL
14	Marketing				0.0	DEFAULT

The program used to invoke PROC CPM and PROC GANTT follows. The CALENDAR= and WORKDAY= options are specified in the PROC GANTT statement to identify the CALEDATA and WORKDATA data sets, respectively. The CALID= option in the CHART statement names the variable identifying the calendar that each observation refers to in the WIDGVAC and CALEDATA data sets. Since the value of MININTERVAL= is DTDAY, setting the SCALE= value to 12 ensures that a single column on the Gantt chart represents two hours. This is done in order to be able to detect a two hour difference between schedules. Consequently, the MINDATE= and MAXDATE= options are used to control the output produced by PROC GANTT. The resulting Gantt chart is shown in [Output 6.9.2](#). Notice the 5

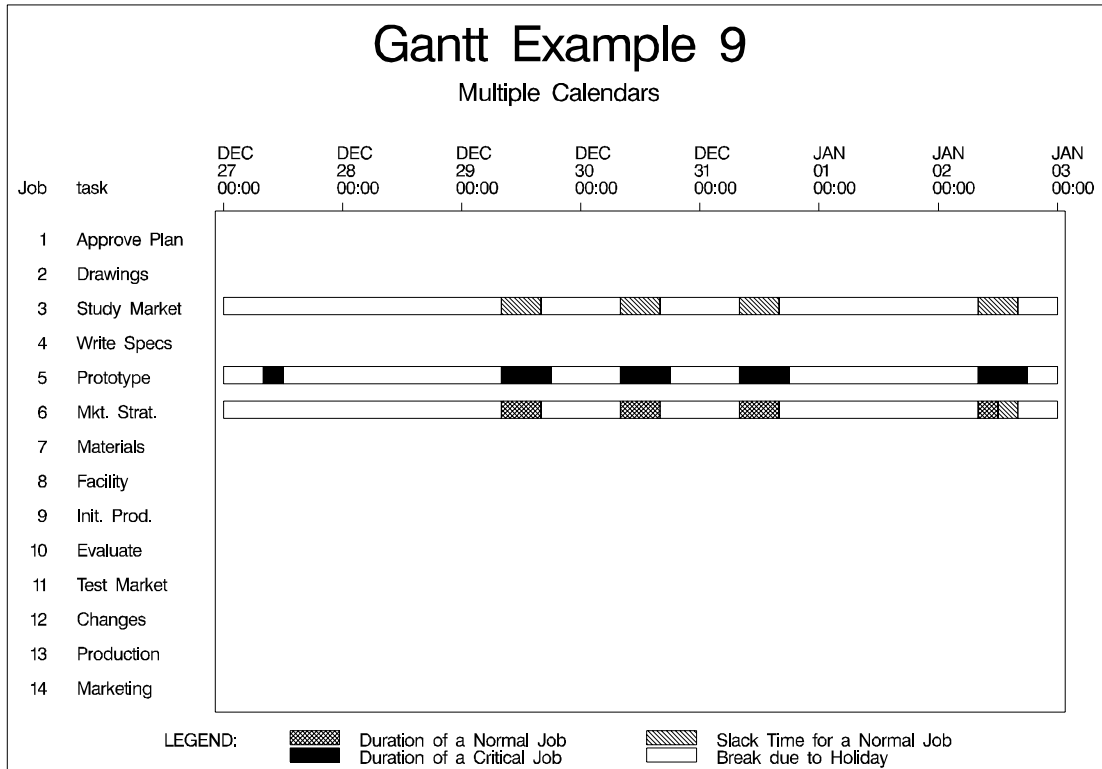
column duration for 'Prototype' on December 29, 2003 representing a 10-hour day versus the 4 column duration for 'Mkt. Strat.' for the same day representing 8 hours of work. Although MAXDATE= is set to 8 a.m. on January 2, 2004, the last tick mark is the beginning of January 3, 2004. This is because the specified value of the MAXDATE= option does not correspond to a tick mark (based on the SCALE= and MININTERVAL= options); the value used is the first tick mark appearing after the value of the MAXDATE= option.

```
proc cpm date='01dec03'd interval=workday data=widgvac
        out=schedvac holidata=holidata
        workday=workdata calendar=caledata;
    holiday holiday / holifin=holifin holidur=holidur;
    activity task;
    duration days;
    successor succ1 succ2 succ3;
    calid cal;
run;

title 'Gantt Example 9';
title2 'Multiple Calendars';

proc gantt data=schedvac holidata=holidata
        workday=workdata calendar=caledata ;
    chart / holiday=(holiday) holiend=(holifin)
        calid=cal
        markbreak scale=12
        mindate='27dec03:00:00'dt
        maxdate='02jan04:08:00'dt
        pcompress;
    id task;
run;
```

Output 6.9.2. Multiple Calendars



Example 6.10. Plotting the Actual Schedule

Suppose that the project is complete and you want to compare the actual progress of the activities with the predicted schedule computed by PROC CPM. The following DATA step stores the actual start and finish times of each activity in a data set named COMPLETE. A data set named WIDGELA is then created that contains both the schedule obtained from PROC CPM (the data set SAVEH from Example 6.3 is used because it does not contain the dummy activity) and the actual schedule. The resulting data set is sorted by early start time.

The COMPRESS option is employed in order to draw the entire Gantt chart on one page. Predicted schedules as well as actual schedules are plotted on separate bars for each activity. The A_START= and A_FINISH= options in the CHART statement are used to specify the variables containing the actual start and finish times for each activity. The actual schedule is plotted with the fill pattern specified in the sixth PATTERN statement. This example also illustrates the drawing of holidays in graphics mode. PROC GANTT uses the fill pattern specified in the seventh PATTERN statement to represent the holidays defined by the HOLIDATA= data set. The holidays are identified to PROC GANTT by specifying the HOLIDAY= and HOLIFIN= options in the CHART statement.

The HCONNECT option causes a connecting line to be drawn from the left boundary of the chart to the early start time for each activity. The CHCON= option specifies the color for drawing the connect lines. You can use the LHCON= option in the CHART statement to specify a line style other than the default style for the connect lines. The Gantt chart is shown in Output 6.10.1.

```

data complete;
  format activity $12. sdate date7. fdate date7.;
  input activity & sdate & date7. fdate & date7.;
  datalines;
Approve Plan    01dec03    05dec03
Drawings       06dec03    16dec03
Study Market   05dec03    09dec03
Write Specs     07dec03    12dec03
Prototype      17dec03    03jan04
Mkt. Strat.    10dec03    19dec03
Materials      02jan04    11jan04
Facility       01jan04    13jan04
Init. Prod.    13jan04    21jan04
Evaluate       22jan04    01feb04
Test Market    23jan04    08feb04
Changes        05feb04    11feb04
Production     12feb04    12feb04
Marketing      26jan04    26jan04
;

* merge the computed schedule with the actual schedule;
data widgela;
  merge saveh complete;
  run;

* sort the data;
proc sort;
  by e_start;
  run;

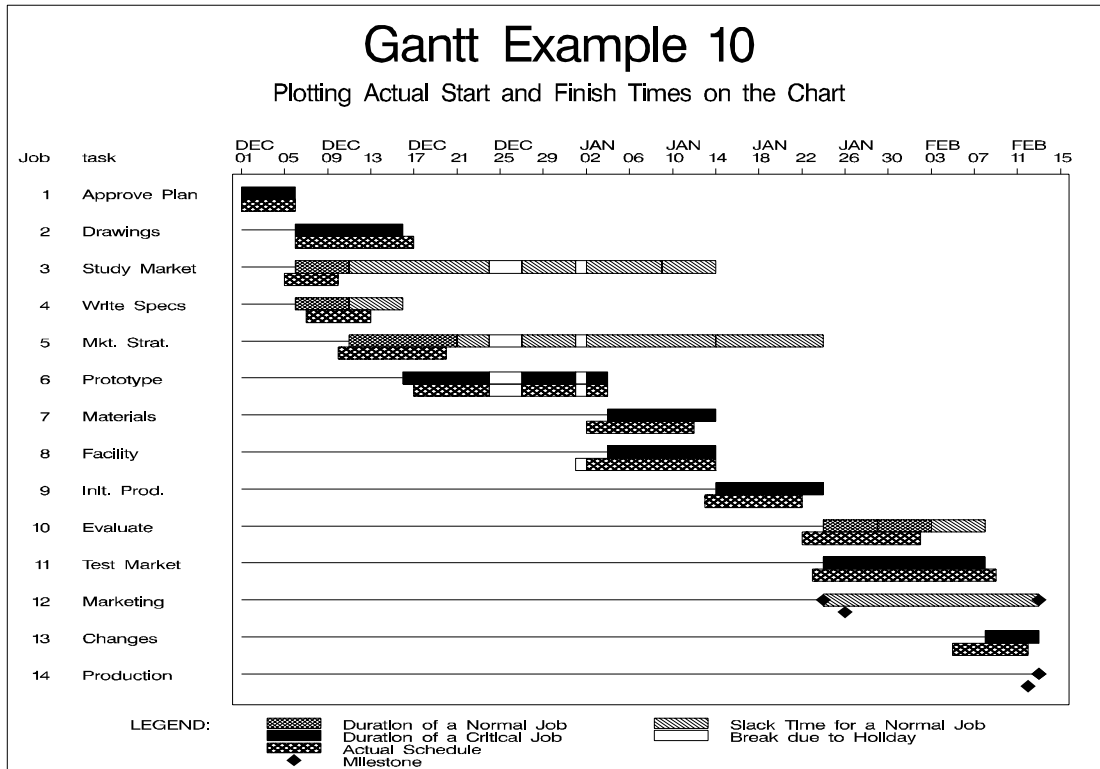
title f=swiss 'Gantt Example 10';
title2 f=swiss
      'Plotting Actual Start and Finish Times on the Chart';

* set vpos to 40 and hpos to 100;
goptions vpos=40 hpos=100;

* plot the computed and actual schedules using proc gantt;
proc gantt data=widgela holidata=holidays;
  chart / holiday=(holiday) holifin=(holifin)
        a_start=sdate a_finish=fdate
        dur=days cmile=blue
        font=swiss ctext=blue
        caxis=black hconnect
        compress;
  id task;
  run;

```

Output 6.10.1. Plotting the Actual Schedule on the Gantt Chart



Example 6.11. Comparing Progress Against a Baseline Schedule

Suppose that the widget manufacturing project is currently in progress and you want to measure its performance by comparing it with a baseline schedule. For example, the baseline schedule may be the originally planned schedule, a target schedule that you would like to achieve, or an existing schedule that you intend to improve on. The data for this example come from Example 2.13, which was used to illustrate the options available in PROC CPM. Prior to the beginning of the project, the predicted early schedule is saved by PROC CPM as the baseline schedule. Progress information for the project as of December 19, 2003, is saved in the ACTUAL data set. The variables SDATE and FDATE represent the actual start and actual finish times, respectively. The variables PCTC and RDUR represent the percent of work completed and the remaining days of work for each activity, respectively. PROC CPM is then invoked using the baseline and project progress information with TIMENOW set to December 19, 2003. The scheduling is carried out with the AUTOPUPDT option in order to automatically update progress information. The Schedule data set WIDGUPDT produced by PROC CPM is shown in Output 6.11.1. Notice that the development of a marketing strategy (activity 5: 'Mkt. Strategy') and the building of the prototype (activity 6: 'Prototype') have a specified value for A_START and a missing value for A_FINISH, indicating that they are currently in progress at TIMENOW.

PROC GANTT is next invoked with the data set WIDGUPDT. This data set contains the actual schedule variables A_START and A_FINISH and the baseline schedule

variables B_START and B_FINISH. The Gantt chart is drawn with three schedule bars per activity. The first bar represents the predicted early/late schedule based on the actual data specified, the second bar represents the actual schedule, and the third bar represents the baseline schedule. The TIMENOW= option is specified in the CHART statement to draw a timenow line on December 19, 2003. Actual schedule bars for 'Mkt. Strategy' and 'Prototype' are drawn up to TIMENOW to indicate that they are currently in progress. You can use the CTNOW=, LTNOW=, and WTNOW= options to change the color, style, and width of the timenow line, respectively. To suppress the timenow label displayed at the bottom of the axis, specify the NOTNLABEL in the CHART statement.

```

* estimate schedule based on actual data;
proc cpm data=widgact holidata=holidays
    out=widgupdt date='1dec03'd;
    activity task;
    succ      succ1 succ2 succ3;
    duration days;
    holiday  holiday / holifin=(holifin);
    baseline / compare=early;
    actual / as=sdate af=fdate timenow='19dec03'd
            remdur=rdur pctcomp=pctc
            autoupdt;

run;

* sort the data;
proc sort;
    by e_start;
run;

title 'Gantt Example 11';
title2 'Progress Data';

* print the data;
proc print;
    var task e_ l_ a_start a_finish b_ ;
run;

* set up required pattern statements;
pattern1 c=black v=r1; /* duration of a noncritical act. */
pattern2 c=black v=e; /* slack time for a noncrit. act. */
pattern3 c=black v=s; /* duration of a critical act. */
pattern4 c=black v=e; /* slack time for a supercrit. act. */
pattern5 c=black v=r2; /* duration of a supercrit. act. */
pattern6 c=black v=l1; /* actual duration of an activity */
pattern7 c=black v=x1; /* break due to a holiday */
pattern8 c=black v=l1; /* resource schedule of activity */
pattern9 c=black v=e; /* baseline schedule of activity */

title f=swiss 'Gantt Example 11';
title2 f=swiss 'Comparing Project Progress against a Baseline
Schedule';

```

```

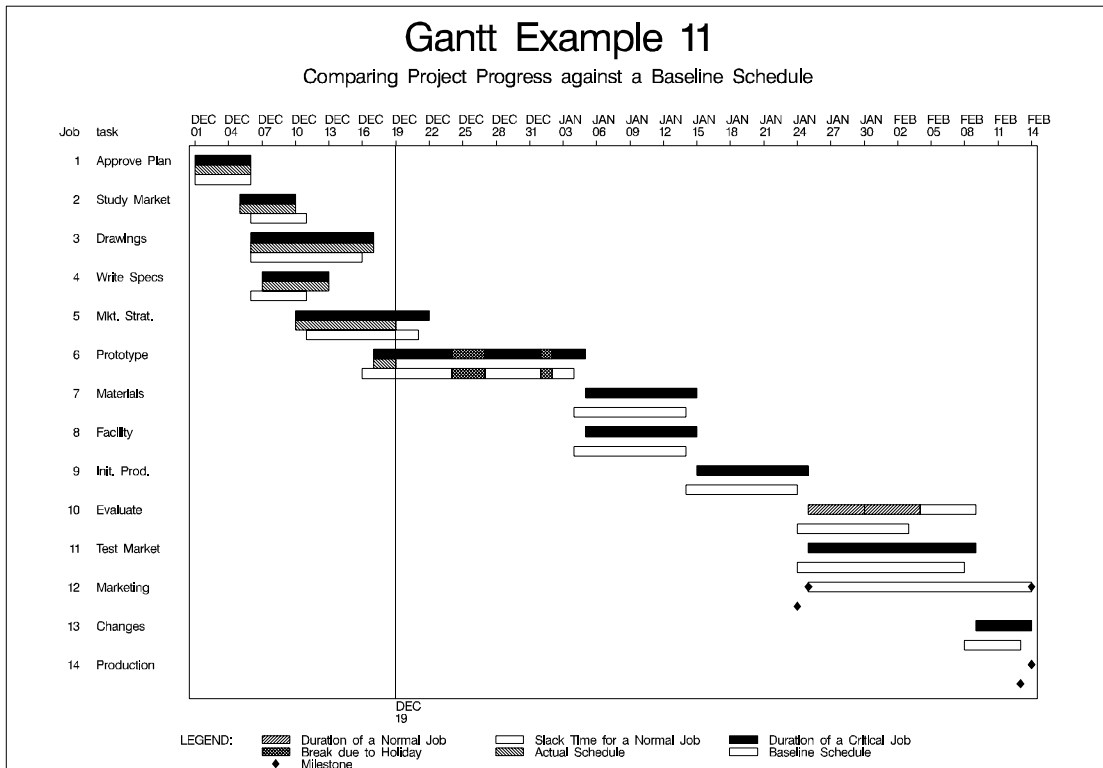
* plot the actual and baseline schedules using proc gantt;
proc gantt data=widgupdt holidata=holidays;
  chart / holiday=(holiday) holifin=(holifin)
        timenow='19dec03'd dur=days
        scale=2 height=1.25 font=swiss
        pcompress;
id task;
run;

```

Output 6.11.1. Schedule Data Set WIDGUPDT

Gantt Example 11 Progress Data									
Obs	task	E_START	E_FINISH	L_START	L_FINISH	A_START	A_FINISH	B_START	B_FINISH
1	Approve Plan	01DEC03	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03	01DEC03	05DEC03
2	Study Market	05DEC03	09DEC03	05DEC03	09DEC03	05DEC03	09DEC03	06DEC03	10DEC03
3	Drawings	06DEC03	16DEC03	06DEC03	16DEC03	06DEC03	16DEC03	06DEC03	15DEC03
4	Write Specs	07DEC03	12DEC03	07DEC03	12DEC03	07DEC03	12DEC03	06DEC03	10DEC03
5	Mkt. Strat.	10DEC03	21DEC03	10DEC03	21DEC03	10DEC03	.	11DEC03	20DEC03
6	Prototype	17DEC03	04JAN04	17DEC03	04JAN04	17DEC03	.	16DEC03	03JAN04
7	Materials	05JAN04	14JAN04	05JAN04	14JAN04	.	.	04JAN04	13JAN04
8	Facility	05JAN04	14JAN04	05JAN04	14JAN04	.	.	04JAN04	13JAN04
9	Init. Prod.	15JAN04	24JAN04	15JAN04	24JAN04	.	.	14JAN04	23JAN04
10	Evaluate	25JAN04	03FEB04	30JAN04	08FEB04	.	.	24JAN04	02FEB04
11	Test Market	25JAN04	08FEB04	25JAN04	08FEB04	.	.	24JAN04	07FEB04
12	Marketing	25JAN04	25JAN04	14FEB04	14FEB04	.	.	24JAN04	24JAN04
13	Changes	09FEB04	13FEB04	09FEB04	13FEB04	.	.	08FEB04	12FEB04
14	Production	14FEB04	14FEB04	14FEB04	14FEB04	.	.	13FEB04	13FEB04

Output 6.11.2. Comparing Project Progress Against a Baseline Schedule



Example 6.12. Using the COMBINE Option

When you monitor a project in progress, as in the previous example, it is evident that there are no actual dates beyond TIMENOW and that PROC CPM sets the early times to the corresponding actual times for activities that are completed or in progress (see [Output 6.11.1](#)). For example, activities 1 through 4 have their early schedule equal to the actual schedule. Activities 5 and 6 have their early start equal to the actual start; however the actual finish for these two activities is missing since they are in progress at TIMENOW. Finally, activities 7 through 14 have no actual information.

The COMBINE option in PROC GANTT exploits the fact that the early times are made consistent with the actual times to strip away a lot of the redundancy and produce a more compact Gantt chart while retaining all of the essential schedule information. Specifying the COMBINE option in the CHART statement of the previous example produces the Gantt chart in [Output 6.12.1](#). Instead of using two separate bars to draw the early/late schedule and the actual schedule, the COMBINE option causes PROC GANTT to use one bar to represent all three schedules and draws a timenow line. The actual schedule is shown to the left of TIMENOW and the early/late schedule is shown to the right of TIMENOW. Thus, for activities 1 through 4, the actual schedule is drawn on the first bar to the left of the timenow line. Activities 5 and 6 are in progress at TIMENOW, which is indicated by the actual start positioned to the left of TIMENOW and the predicted early/late schedule, based on the progress made up to TIMENOW, drawn to the right of TIMENOW. Activities 7 through 14 have not yet started, and this is reflected in their predicted early/late schedules drawn to the right of TIMENOW.

The COMBINE option draws a timenow line by default, and if the TIMENOW= option is not specified, the procedure computes the value of TIMENOW based on the schedule data as explained in the “Syntax” section. In this example, specifying the COMBINE option without the TIMENOW= option causes a timenow line to be drawn on December 18, 2003, since this is the first day following the largest actual value. The CTNOW= option is used to specify the color of the timenow line. You can change the line style and line width of the timenow line by specifying the LTNOW= and WTNOW= options, respectively, in the CHART statement.

```

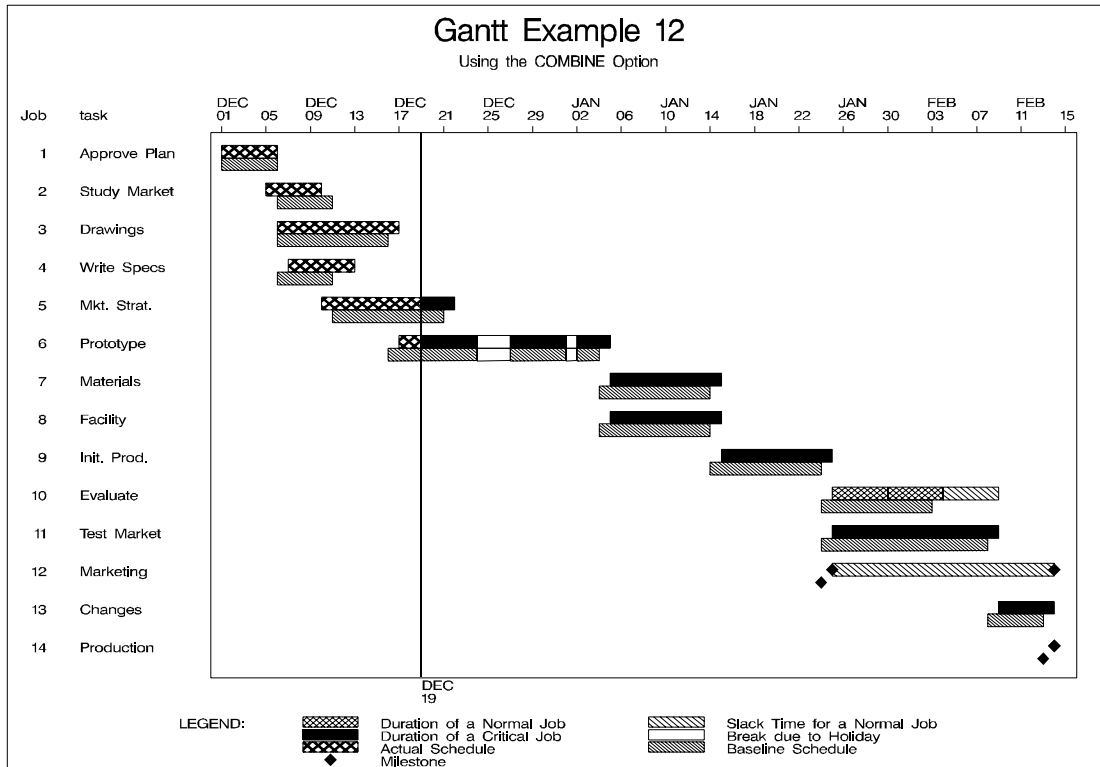
title f=swiss 'Gantt Example 12';
title2 f=swiss 'Using the COMBINE Option';

* set vpos to 50 and hpos to 100;
goptions vpos=50 hpos=100;

* plot the combined and baseline schedules using proc gantt;
proc gantt graphics data=widgupdt holidaydata=holidays;
  chart / holiday=(holiday) holifin=(holifin)
        timenow='19dec03'd ctnow=red
        combine
        dur=days
        font=swiss
        compress;
  id task;
run;

```


Output 6.12.1. Using the COMBINE Option in Graphics Mode



Example 6.13. Plotting the Resource-Constrained Schedule

This example illustrates plotting the resource-constrained schedules on a Gantt chart. The schedule used is the one produced in Example 2.19 using the CPM procedure. The output data set from PROC CPM is displayed in Output 6.13.1. Notice that the activities ‘Drawings’ and ‘Mkt. Strat.’ have been split to produce a shorter project duration than if they had not been split.

PROC GANTT is invoked with all default options and an ID statement. The early/late schedule is drawn on the first bar, and the resource-constrained schedule is drawn on the second bar of each activity. The observations corresponding to the split segments of each activity have been combined to produce the plot of the resource-constrained schedule for that activity. Thus, even though the Schedule data set input to PROC GANTT contains 18 observations, the Gantt chart shows each of the 14 activities only once.

```

title f=swiss 'Gantt Example 13';
title2 f=swiss 'Resource Constrained Schedule';

* plot the resource-constrained schedule using proc gantt;

proc gantt data=spltschd holidata=holdata;
  chart / holiday=(hol) dur=days
        font=swiss pcompress;
  id task;
run;

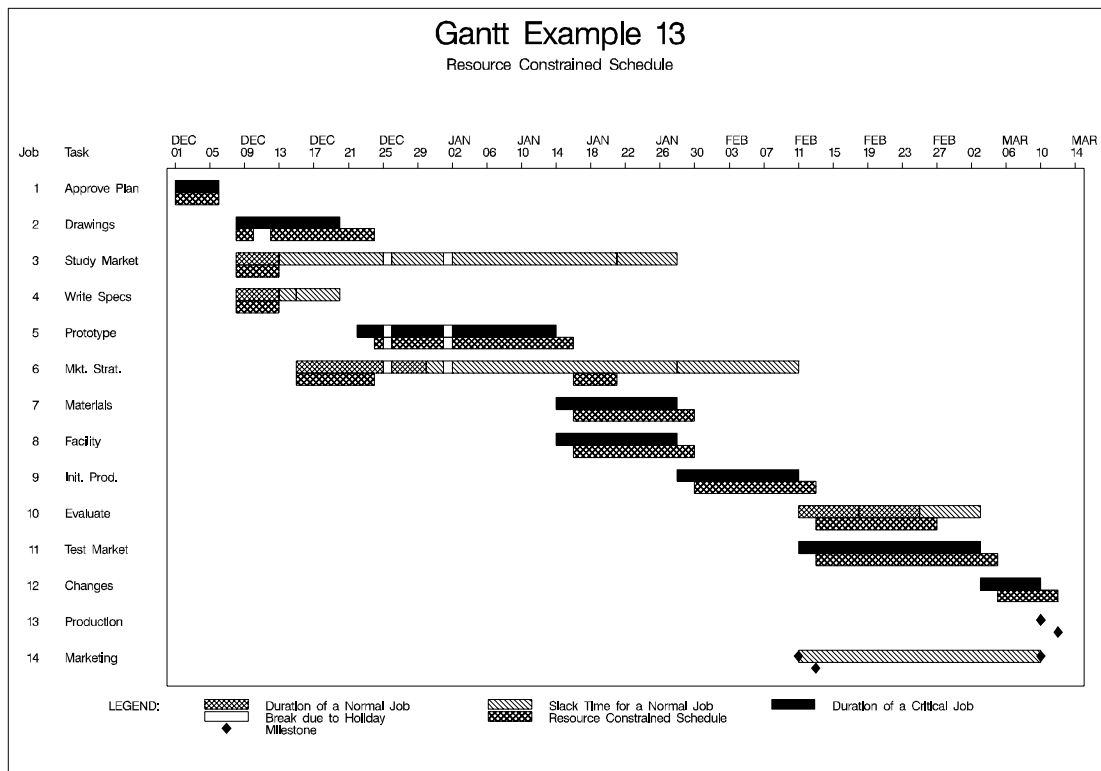
```

Output 6.13.1. Schedule Data Set SPLTSCHD

Gantt Example 13
Project Schedule: Splitting Allowed

		S	S	E	L
		E	S	E	L
		G	F	F	F
		M	I	S	I
T	s	T	N	T	N
O	u	—	A	I	A
b	c	N	R	S	R
s	k	O	T	H	T
1	Approve Plan Drawings	. 5 1 .	01DEC03 05DEC03	01DEC03 05DEC03	01DEC03 05DEC03
2	Drawings Prototype	. 10 . 1	08DEC03 23DEC03	08DEC03 19DEC03	08DEC03 19DEC03
3	Drawings Prototype	1 2 . 1	08DEC03 09DEC03	08DEC03 08DEC03	08DEC03 19DEC03
4	Drawings Prototype	2 8 . 1	12DEC03 23DEC03	08DEC03 19DEC03	08DEC03 19DEC03
5	Study Market Mkt. Strat.	. 5 . .	08DEC03 12DEC03	08DEC03 12DEC03	21JAN04 27JAN04
6	Write Specs Prototype	. 5 . .	08DEC03 12DEC03	08DEC03 12DEC03	15DEC03 19DEC03
7	Prototype Materials	. 15 1 .	24DEC03 15JAN04	22DEC03 13JAN04	22DEC03 13JAN04
8	Mkt. Strat. Test Market	. 10 1 .	15DEC03 20JAN04	15DEC03 29DEC03	28JAN04 10FEB04
9	Mkt. Strat. Test Market	1 7 1 .	15DEC03 23DEC03	15DEC03 29DEC03	28JAN04 10FEB04
10	Mkt. Strat. Test Market	2 3 1 .	16JAN04 20JAN04	15DEC03 29DEC03	28JAN04 10FEB04
11	Materials Init. Prod.	. 10 . .	16JAN04 29JAN04	14JAN04 27JAN04	14JAN04 27JAN04
12	Facility Init. Prod.	. 10 . .	16JAN04 29JAN04	14JAN04 27JAN04	14JAN04 27JAN04
13	Init. Prod. Test Market	. 10 1 .	30JAN04 12FEB04	28JAN04 10FEB04	28JAN04 10FEB04
14	Evaluate Changes	. 10 1 .	13FEB04 26FEB04	11FEB04 24FEB04	18FEB04 02MAR04
15	Test Market Changes	. 15 . .	13FEB04 04MAR04	11FEB04 02MAR04	11FEB04 02MAR04
16	Changes Production	. 5 . .	05MAR04 11MAR04	03MAR04 09MAR04	03MAR04 09MAR04
17	Production	. 0 1 .	12MAR04 12MAR04	10MAR04 10MAR04	10MAR04 10MAR04
18	Marketing	. 0 . .	13FEB04 13FEB04	11FEB04 11FEB04	10MAR04 10MAR04

Output 6.13.2. Plotting the Resource-Constrained Schedule



Example 6.14. Specifying the Schedule Data Directly

Although each of the examples shown so far uses PROC CPM to produce the Schedule data set for PROC GANTT, this is by no means a requirement of the GANTT procedure. While the CPM procedure is a convenient means for producing different types of schedules, you can create your own schedule and draw a Gantt chart of the schedule without any intervention from PROC CPM. This is done by storing the schedule information in a SAS data set and specifying the data set name using the DATA= option in the PROC GANTT statement. It is also not necessary for the variables in the data set to have specific names, although giving the variables certain names can eliminate the need to explicitly identify them in the CHART statement.

An example of the direct type of input can be seen in [Example 6.10](#) which illustrates plotting of the actual schedule. In [Example 6.10](#), PROC CPM was used to compute the predicted early/late schedule, which was then stored in the SAVEH data set. However, information about the actual schedule, which was provided in the COMPLETE data set, was not used by PROC CPM. Instead, this information was merged with the SAVEH data set to form WIDGELA, the Schedule data set for PROC GANTT. The variables representing the actual start and finish were identified to PROC GANTT using the A_START= and A_FINISH= options, respectively, in the CHART statement. The identification of the variables would not have been necessary if the start and finish variable names were A_START and A_FINISH, respectively.

The following example draws a Gantt chart of the early, late, and resource-constrained schedules for the widget manufacturing project. The schedule information is held in the WIDGDIR data set. The WIDGDIR data set contains the variables TASK, SEGMENT_NO, DUR, RS, RF, E_START, E_FINISH, SDATE, and FDATE. The variable TASK identifies the activity. E_START and E_FINISH are recognized as the default names of the early start and early finish variables, respectively. The variables SDATE and FDATE define the late start and late finish times, respectively. Since these are not the default names for the late schedule variables, they need to be identified as such by specifying the LS= and LF= options (or the L_START= and L_FINISH= options) in the CHART statement. The variables RS and RF represent the resource-constrained start and finish times, respectively. As with the late schedule, these variables need to be identified to PROC GANTT by specifying the SS= and SF= options (or the S_START= and S_FINISH= options) in the CHART statement. Further, the SEGMENT_NO variable identifies the segment number of the resource constrained schedule that an observation corresponds to since these are activities that start and stop multiple times before completion. The ZDUR variable is identified as a zero duration indicator by specifying the DUR= option in the CHART statement. Since ZDUR is zero for 'Production' and 'Marketing,' these activities are represented by milestones on the chart. Notice that although all the other activities have a value of '1' for the ZDUR variable, any nonzero value will produce the same result. This is due to the fact that PROC GANTT only uses this variable as an *indicator* of whether the activity has zero duration or not, in contrast to the interpretation of the DURATION variable in PROC CPM.

```
options ps=60 ls=100;
```

```

title f=swiss 'Gantt Example 14';

/* Activity-on-Node representation of the project */
data widgdir;
  format task $12. rs rf e_start e_finish sdate fdate date7.;
  input task & segmt_no zdur rs & date7. rf & date7.
        e_start & date7. e_finish & date7.
        sdate & date7. fdate & date7.;
  datalines;
Approve Plan . 1 01DEC03 05DEC03 01DEC03 05DEC03 01DEC03 05DEC03
Drawings . 1 08DEC03 23DEC03 08DEC03 19DEC03 08DEC03 19DEC03
Drawings 1 1 08DEC03 09DEC03 08DEC03 19DEC03 08DEC03 19DEC03
Drawings 2 1 12DEC03 23DEC03 08DEC03 19DEC03 08DEC03 19DEC03
Study Market . 1 08DEC03 12DEC03 08DEC03 12DEC03 21JAN04 27JAN04
Write Specs . 1 08DEC03 12DEC03 08DEC03 12DEC03 15DEC03 19DEC03
Prototype . 1 24DEC03 15JAN04 22DEC03 13JAN04 22DEC03 13JAN04
Mkt. Strat. . 1 15DEC03 20JAN04 15DEC03 29DEC03 28JAN04 10FEB04
Mkt. Strat. 1 1 15DEC03 23DEC03 15DEC03 29DEC03 28JAN04 10FEB04
Mkt. Strat. 2 1 16JAN04 20JAN04 15DEC03 29DEC03 28JAN04 10FEB04
Materials . 1 16JAN04 29JAN04 14JAN04 27JAN04 14JAN04 27JAN04
Facility . 1 16JAN04 29JAN04 14JAN04 27JAN04 14JAN04 27JAN04
Init. Prod. . 1 30JAN04 12FEB04 28JAN04 10FEB04 28JAN04 10FEB04
Evaluate . 1 13FEB04 26FEB04 11FEB04 24FEB04 18FEB04 02MAR04
Test Market . 1 13FEB04 04MAR04 11FEB04 02MAR04 11FEB04 02MAR04
Changes . 1 05MAR04 11MAR04 03MAR04 09MAR04 03MAR04 09MAR04
Production . 0 12MAR04 12MAR04 10MAR04 10MAR04 10MAR04 10MAR04
Marketing . 0 13FEB04 13FEB04 11FEB04 11FEB04 10MAR04 10MAR04
;

data holdata;
  format hol date7.;
  input hol & date7.;
  datalines;
25dec03
01jan04
;

* set up required pattern statements;

pattern1 c=black v=r1; /* duration of a non-critical activity */
pattern2 c=black v=e; /* slack time for a noncrit. activity */
pattern3 c=black v=s; /* duration of a critical activity */
pattern4 c=black v=e; /* slack time for a supercrit. activity */
pattern5 c=black v=r2; /* duration of a supercrit. activity */
pattern6 c=black v=l1; /* actual duration of an activity */
pattern7 c=black v=x1; /* break due to a holiday */
pattern8 c=black v=l1; /* resource schedule of activity */
pattern9 c=black v=e; /* baseline schedule of activity */

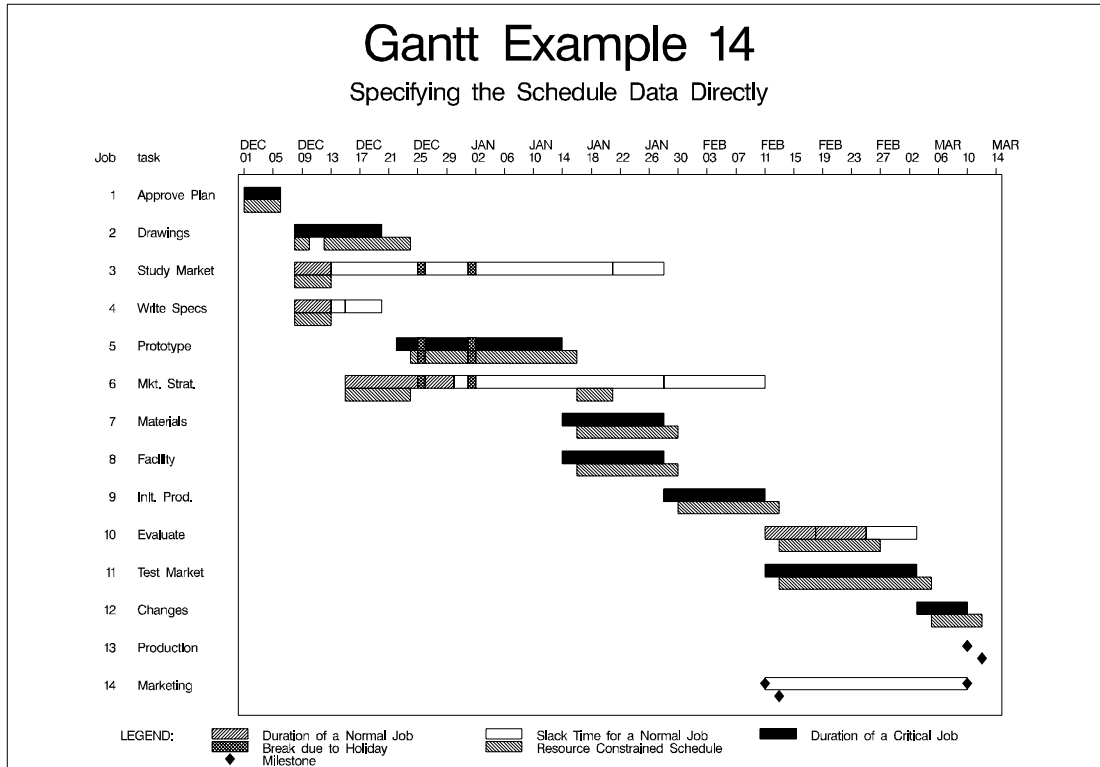
title2 f=swiss 'Specifying the Schedule Data Directly';

proc gantt data=widgdir holidata=holdata;
  chart / holiday=(hol) dur=zdur
        ss=rs sf=rf ls=sdate lf=fdate
        font=swiss pcompress;

```

```
id task;
run;
```

Output 6.14.1. Specifying the Schedule Data Directly



Example 6.15. BY Processing

Every activity in the widget manufacturing project is carried out by one of five departments: Planning, Engineering, Marketing, Manufacturing, and Testing. The DETAILS data set in Example 6.6 identifies the department responsible for each activity. Thus, the project can be thought of as made up of five smaller subprojects, a subproject being the work carried out by a department. A foreseeable need of the project manager and every department is a separate Gantt chart for each subproject. This example uses the WIDGETN data set from Example 2.1, which is formed by merging the WIDGET data set with the DETAILS data set. After scheduling the master project using PROC CPM with DEPT as an ID variable, the Schedule data set is sorted by department name and early start time. The GANTT procedure is then invoked with the variable DEPT specified in the BY statement to obtain individual Gantt charts for each subproject. The Gantt charts for the five different subprojects are shown in Output 6.15.1. The MINDATE= and MAXDATE= options have been specified to ensure a consistent date range across projects. Notice that the TITLE2 statement uses the text substitution option #BYVAR n , which substitutes the name of the n th BY variable. The BY-LINE that appears below the titles identifies the current values of the BY variables. You can suppress this using the NOBYLINE option in an OPTION statement or the HBY option in a GOPTIONS statement. The SPLIT= option is specified to prevent the TASK variable label from being split on the embedded blank.

```

title f=swiss 'Gantt Example 15';

data widgetn;
  label task = "Activity Name";
  merge widget details;
  run;

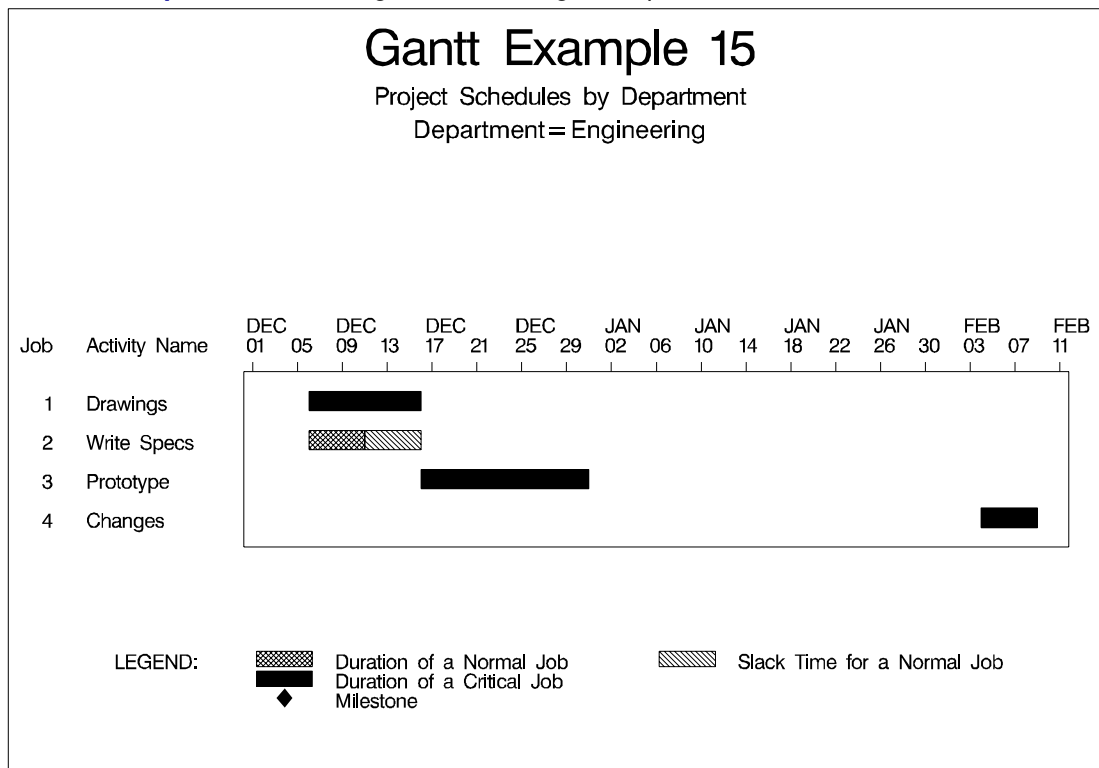
proc cpm date='01dec03'd data=widgetn;
  activity task;
  duration days;
  successor succ1 succ2 succ3;
  id dept;
  run;

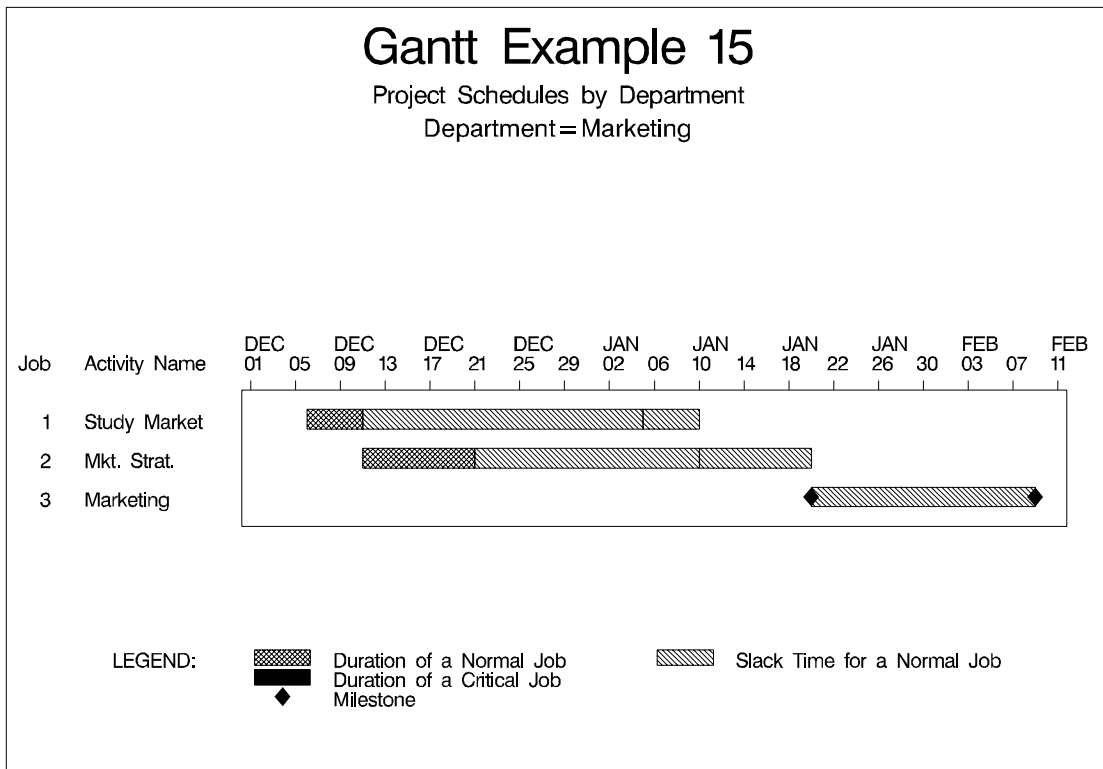
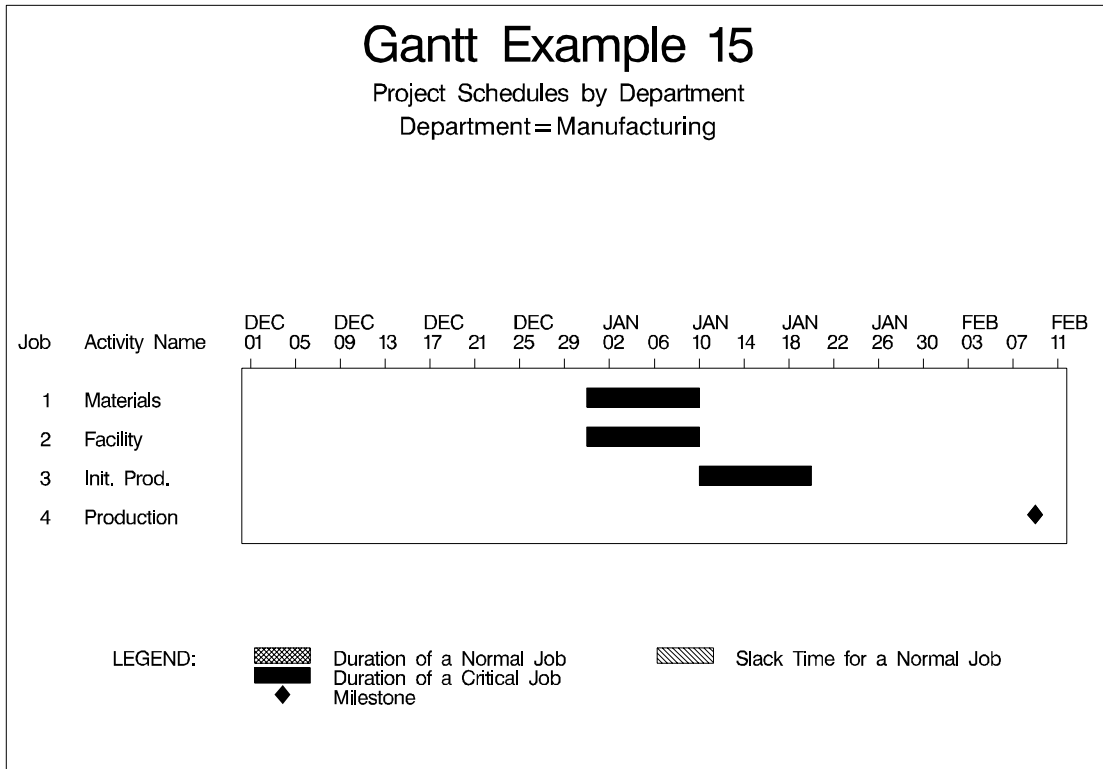
proc sort;
  by dept e_start;
  run;

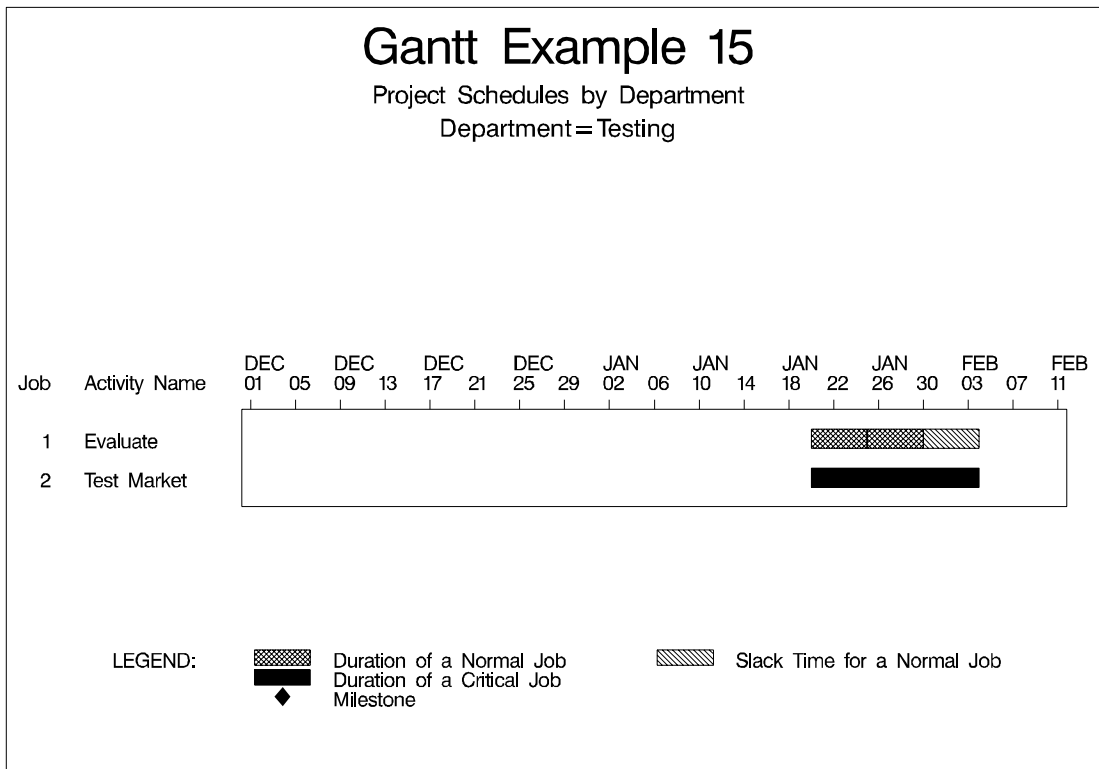
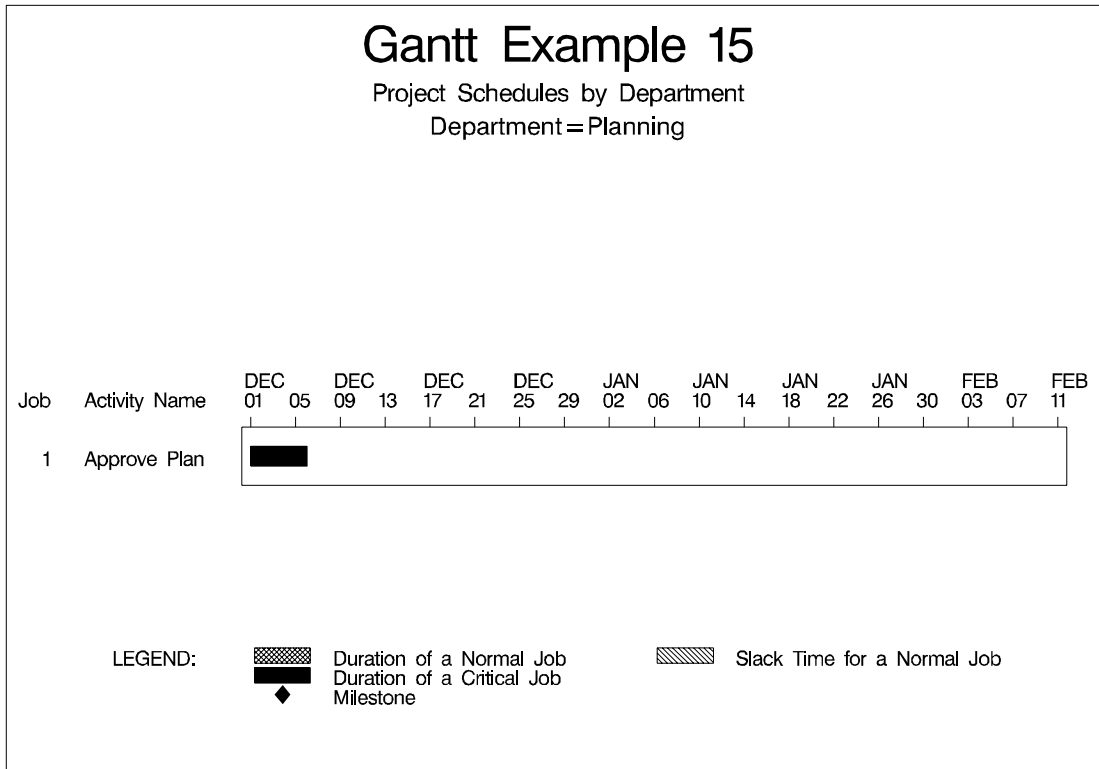
title2 f=swiss 'Project Schedules by #BYVAR1';

proc gantt split='//';
  chart / pcompress scale=1 dur=days
        mindate='01dec03'd maxdate='11feb04'd
        font=swiss ;
  by dept;
  id task;
  run;

```

Output 6.15.1. Using BY Processing for Separate Gantt Charts





Example 6.16. Gantt Charts by Persons

Now suppose that you want to obtain individual Gantt charts for two people (Thomas and William) working on the widget manufacturing project. The data set WIDGBYGP, displayed in [Output 6.16.1](#), contains two new variables, THOMAS and WILLIAM. Each variable has a value '1' for activities in which the person is involved and a missing value otherwise. Thus, a value of '1' for the variable THOMAS in observation number 2 indicates that Thomas is working on the activity 'Drawings.'

PROC CPM is used to schedule the project to start on December 1, 2003. A data set named PERSONS is created containing one observation per activity per person working on that activity and a new variable named PERSON containing the name of the person to which the observation pertains. For example, this new data set contains two observations for the activity 'Write Specs,' one with PERSON='Thomas' and the other with PERSON='William,' and no observation for the activity 'Approve Plan.' This data set is sorted by PERSON and E_START, and displayed in [Output 6.16.2](#). PROC GANTT is next invoked with a BY statement to obtain individual charts for each person. The resulting Gantt charts are shown in [Output 6.16.3](#). The BY-LINE is suppressed by specifying the NOBYLINE option in an OPTIONS statement and the name of the person corresponding to the chart is displayed in the subtitle by using the #BYVAL substitution in the TITLE2 statement.

Output 6.16.1. Data Set WIDGBYGP

Gantt Example 16 Data widgbyp						
Obs	task	days	tail	head	thomas	william
1	Approve Plan	5	1	2	.	.
2	Drawings	10	2	3	1	.
3	Study Market	5	2	4	.	.
4	Write Specs	5	2	3	1	1
5	Prototype	15	3	5	1	1
6	Mkt. Strat.	10	4	6	.	.
7	Materials	10	5	7	.	1
8	Facility	10	5	7	.	1
9	Init. Prod.	10	7	8	1	.
10	Evaluate	10	8	9	1	1
11	Test Market	15	6	9	.	.
12	Changes	5	9	10	1	.
13	Production	0	10	11	.	1
14	Marketing	0	6	12	.	.
15	Dummy	0	8	6	.	.

```

title f=swiss 'Gantt Example 16';

proc cpm data=widgbyp date='1dec03'd;
  tailnode tail;
  duration days;
  headnode head;
  id task thomas william;
run;

data persons;
  set _last_;
  if william^=. then do;

```

```

        person='William';
        output;
        end;
    if thomas^=. then do;
        person='Thomas';
        output;
        end;
    drop thomas william;
run;

proc sort data=persons;
    by person e_start;
run;

title2 'Data PERSONS';
proc print data=persons;
    run;

/* suppress byline */
options nobyline;

title2 f=swiss 'Personalized Gantt Chart for #BYVAL(person)';

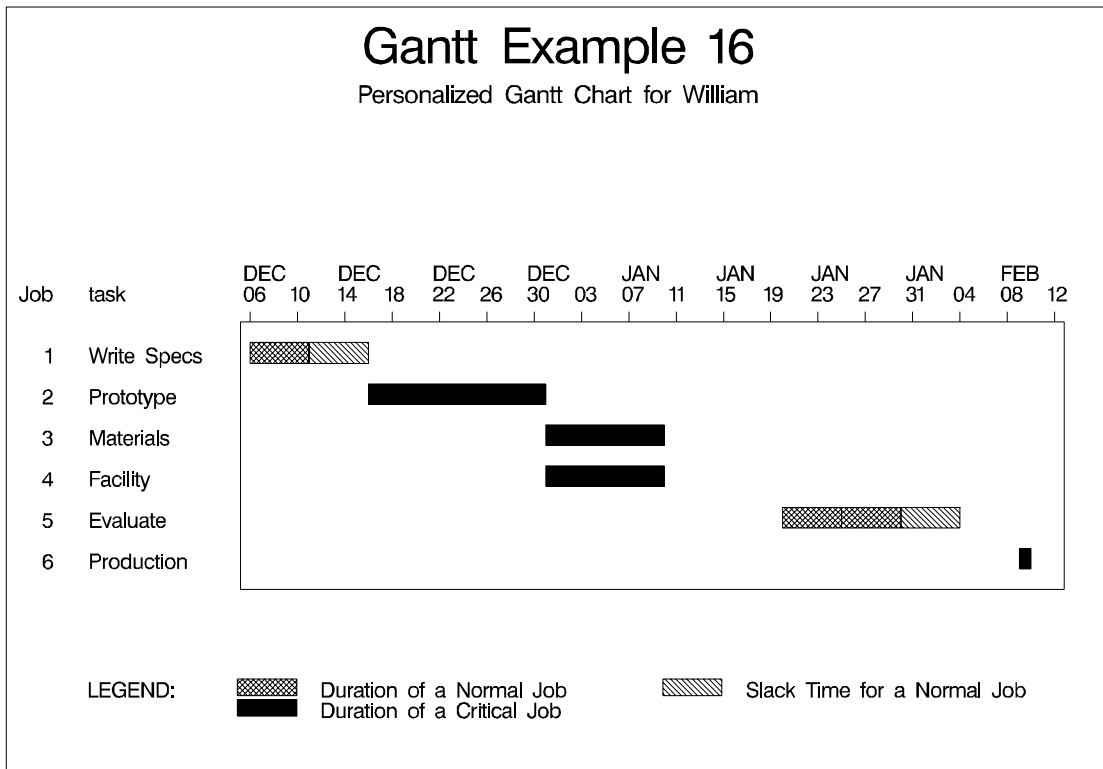
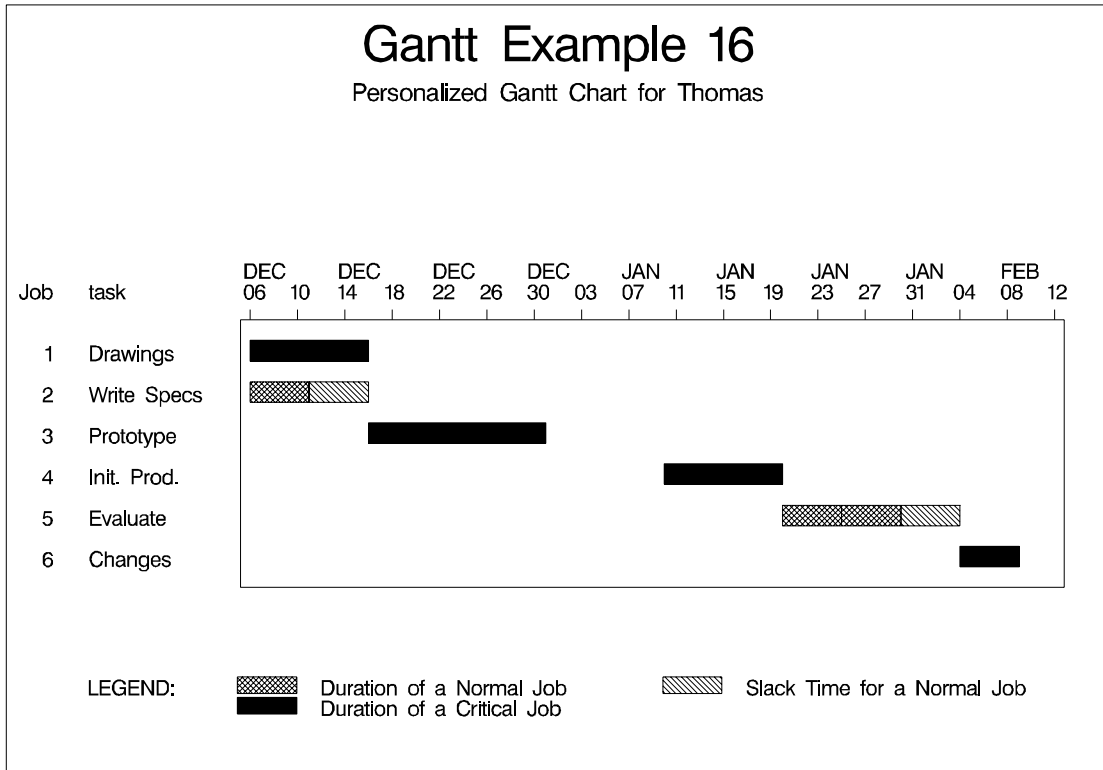
proc gantt data=persons;
    chart / pcompress font=swiss;
    by person;
    id task;
run;

```

Output 6.16.2. Data Set PERSONS

Data PERSONS												
Obs	tail	head	days	task	E_START	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT	person	
1	2	3	10	Drawings	06DEC03	15DEC03	06DEC03	15DEC03	0	0	Thomas	
2	2	3	5	Write Specs	06DEC03	10DEC03	11DEC03	15DEC03	5	5	Thomas	
3	3	5	15	Prototype	16DEC03	30DEC03	16DEC03	30DEC03	0	0	Thomas	
4	7	8	10	Init. Prod.	10JAN04	19JAN04	10JAN04	19JAN04	0	0	Thomas	
5	8	9	10	Evaluate	20JAN04	29JAN04	25JAN04	03FEB04	5	5	Thomas	
6	9	10	5	Changes	04FEB04	08FEB04	04FEB04	08FEB04	0	0	Thomas	
7	2	3	5	Write Specs	06DEC03	10DEC03	11DEC03	15DEC03	5	5	William	
8	3	5	15	Prototype	16DEC03	30DEC03	16DEC03	30DEC03	0	0	William	
9	5	7	10	Materials	31DEC03	09JAN04	31DEC03	09JAN04	0	0	William	
10	5	7	10	Facility	31DEC03	09JAN04	31DEC03	09JAN04	0	0	William	
11	8	9	10	Evaluate	20JAN04	29JAN04	25JAN04	03FEB04	5	5	William	
12	10	11	0	Production	09FEB04	09FEB04	09FEB04	09FEB04	0	0	William	

Output 6.16.3. Gantt Charts by Person



Example 6.17. Using the HEIGHT= and HTOFF= Options

The following example illustrates two options that control the height and positioning of all text produced by PROC GANTT. The data used for this example come from [Example 6.13](#), which illustrates plotting of the resource-constrained schedule. PATTERN statements are specified in order to identify the fill patterns for the different schedule types and holidays. The resource-constrained schedule is drawn using the fill pattern from the eighth PATTERN statement. The HEIGHT= option is set to 2, indicating that the height of all text produced by PROC GANTT be equal to the height of two activity bars. This text includes activity text, legend text, and axis labeling text. The HTOFF= option is also set to 2, which drops the font baseline of the activity text by the height of one schedule bar causing the font baseline to be positioned at the bottom of the resource-constrained schedule bar. The resulting Gantt chart is displayed in [Output 6.17.1](#).

```

title f=swiss 'Gantt Example 17';
title2 f=swiss 'Using the HEIGHT= and HTOFF= options';

* set vpos to 50 and hpos to 100;
options vpos=50 hpos=100;

* set up required pattern statements;
pattern1 c=black v=r1; /* duration of a noncrit. activity */
pattern2 c=black v=e; /* slack time for a noncrit. act. */
pattern3 c=black v=s; /* duration of a critical activity */
pattern4 c=black v=e; /* slack time for a supercrit. act. */
pattern5 c=black v=r2; /* duration of a supercrit. act. */
pattern6 c=black v=l1; /* actual duration of an activity */
pattern7 c=black v=x1; /* break due to a holiday */
pattern8 c=black v=l1; /* res. constrained dur of an act. */
pattern9 c=black v=e; /* baseline duration of an activity */

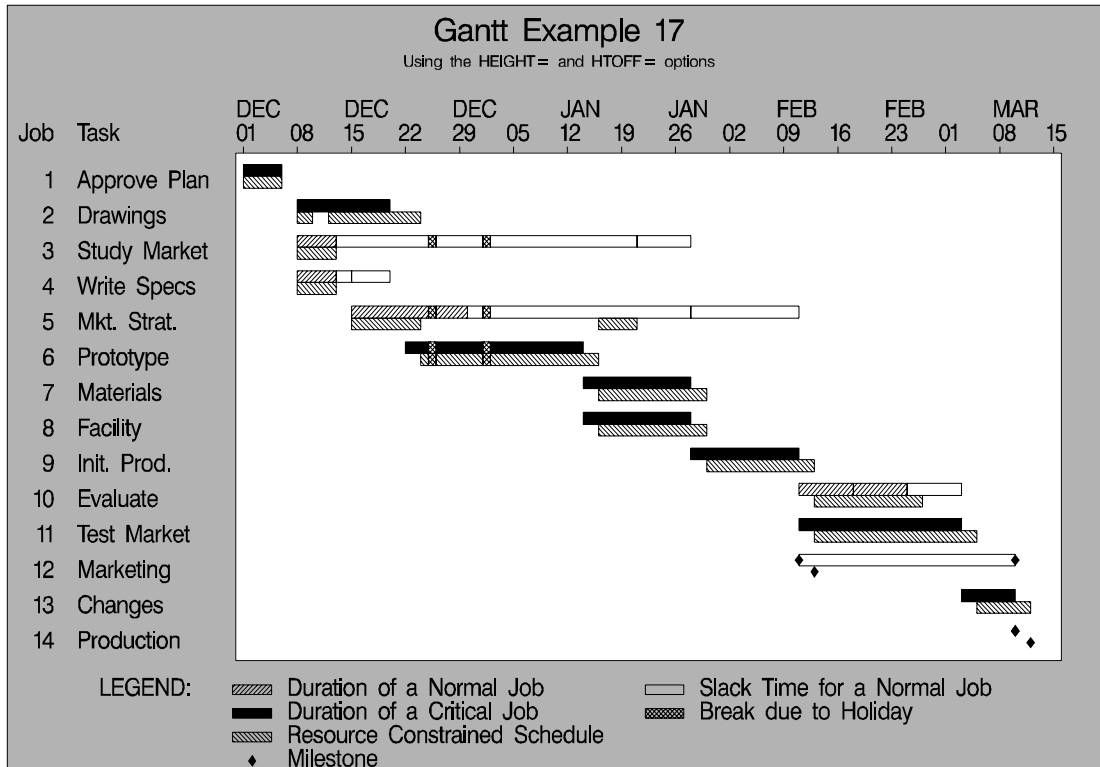
proc sort data=spltschd;
  by e_start;
run;

options cback=cyan;

* draw Gantt chart using height and htoff equal to 2;
proc gantt data=spltschd holidata=holdata;
  chart / holiday=(hol) font=swiss
        dur=days cmile=green
        height=2
        htoff=2
        compress;
  id task;
run;

```

Output 6.17.1. Using the HEIGHT= and HTOFF= options



Example 6.18. Drawing a Logic Gantt Chart Using AON Representation

This example uses the data of Example 6.10, which illustrates the drawing of the actual schedule. The ACTIVITY= and SUCCESSOR= options are specified in the CHART statement to define the precedence relationships using the AON format to PROC GANTT. Since no LAG= option is specified, the lag type of each connection is assumed to be Finish-to-Start (FS). In this case, the precedence defining variables exist in the WIDGELA data set; however, this is not a requirement. The precedence defining variables can belong to a different data set as long as the ACTIVITY variable is common to both data sets and the PRECDATA= option, identifying the Precedence data set, is specified in the PROC GANTT statement. Setting the LEVEL= option to 2 causes the actual schedule bar to be used as the logic bar; that is, PROC GANTT draws the precedence connections with respect to the actual schedule. By default, the precedence connections are drawn with respect to the first bar. The color of the precedence connections is specified with the CPREC= option in the CHART statement. You can change the line style and line width of the precedence connections by specifying the LPREC= and WPREC= options in the CHART statement. The resulting Gantt chart is shown in Output 6.18.1.

```

title f=swiss 'Gantt Example 18';
title2 f=swiss
      'Logic Gantt Chart: AON Representation and LEVEL= Option';

* sort the data;
    
```

```

proc sort;
  by e_start;
  run;

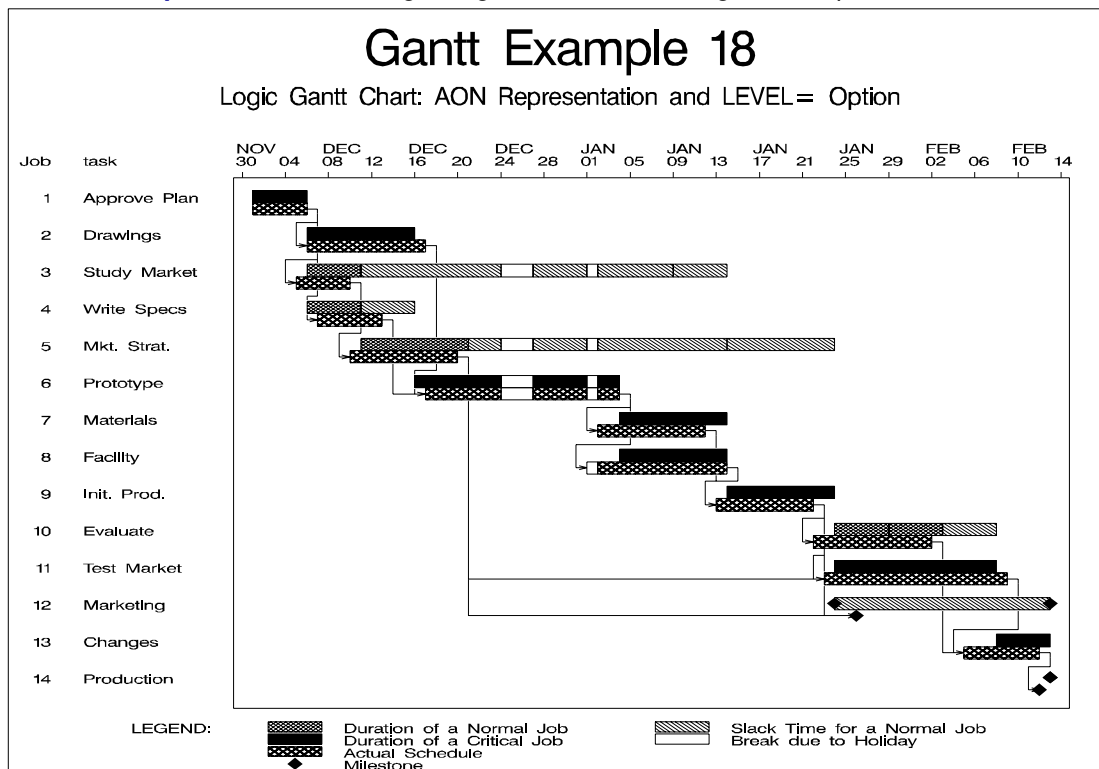
* set vpos to 50 and hpos to 100;
goptions vpos=50 hpos=100;

* set background to ltgray;
goptions cback=ltgray;

* draw the Logic Gantt chart;
proc gantt data=widgela holidaydata=holidays;
  chart / holiday=(holiday) holifin=(holifin)
  a_start=sdate a_finish=fdate
  cmile=black dur=days
  font=swiss
  activity=task successor=(succ1-succ3)
  level=2
  cprec=blue
  compress;
id task;
run;

```

Output 6.18.1. Drawing a Logic Gantt Chart Using AON Representation



Example 6.19. Specifying the Logic Control Options

This example illustrates four options that control the routing of a precedence connection from an activity to its successor on the logic Gantt chart. The example also illustrates the drawing of a Logic Gantt chart using the Activity-on-Arc format.

The Activity data set for PROC CPM is the WIDGETA data set from [Example 2.2](#), which defines the widget manufacturing project in AOA format. The project is scheduled subject to weekends, and the holidays are defined in the HOLDATA data set. The resulting schedule is stored in the output data set SAVEHP. The GANTT procedure is next invoked to produce a Logic Gantt chart by specifying the HEAD= and TAIL= options in the CHART statement. The TRIPLEX font is used for all text except for the first TITLE by specifying it globally using the FTEXT= option in a GOPTIONS statement. The same effect could have been obtained by specifying the TRIPLEX font using the FONT= option in the CHART statement and the F= option in the TITLE2 statement. The resulting Logic Gantt chart is shown in [Output 6.19.1](#).

```

title f=swiss 'Gantt Example 19';

data holdata;
  format hol date7.;
  input hol & date7.;
  datalines;
25dec03
01jan04
;

* schedule the project subject to holidays and weekends;

proc cpm data=widgeta holidata=holdata out=savehp
  date='1dec03'd interval=weekday;
  tailnode tail;
  headnode head;
  duration days;
  holiday hol;
  id task dept descrpt;
run;

* sort the schedule by the early start date ;

proc sort;
  by e_start;
run;

* set background to white, text to black and font to triplex;

goptions cback=white ctext=black ftext=triplex;

* set vpos to 50 and hpos to 100;

```

```

goptions vpos=50 hpos=100;

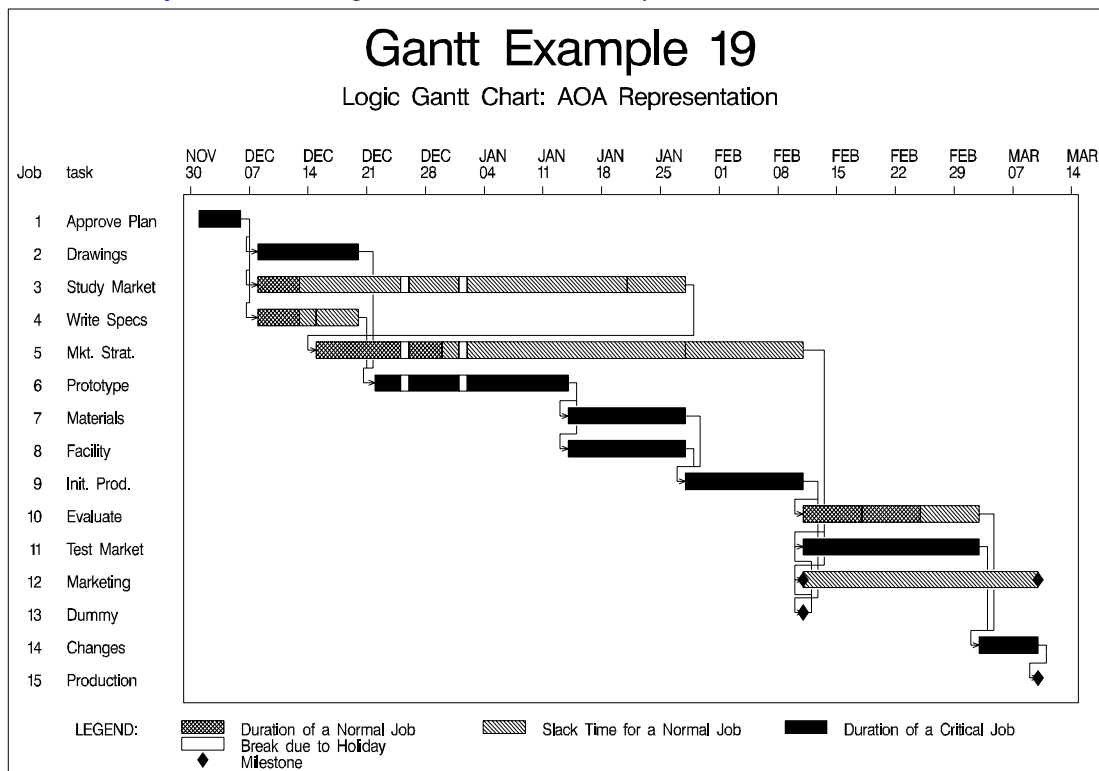
* plot the Logic Gantt chart using AOA representation;

title2 'Logic Gantt Chart: AOA Representation';

proc gantt data=savehp holdata=holdata;
  chart / holiday=(hol) dur=days increment=7 compress
        caxis=black cmile=cyan cprec=blue
        head=head tail=tail;
  id task;
run;

```

Output 6.19.1. Logic Gantt Chart: AOA Representation



The next invocation of PROC GANTT illustrates the effect of the MININTGV= and MINOFFGV= options, which control placement of the global verticals. The concept of global verticals is explained in the “[Specifying the Logic Options](#)” section on page 511. The data sets from the previous invocation of the GANTT procedure remain unchanged. The minimum distance of a global vertical from the end of the bar it is associated with is increased from its default of 1 cell to 2.5 cells by specifying MINOFFGV=2.5. Likewise, the minimum distance between any two global verticals is increased from its default of .75 cells to 2 cells by specifying MININTGV=2.0. The effects of these changes are visible in the resulting Logic Gantt chart shown in [Output 6.19.2](#).


```

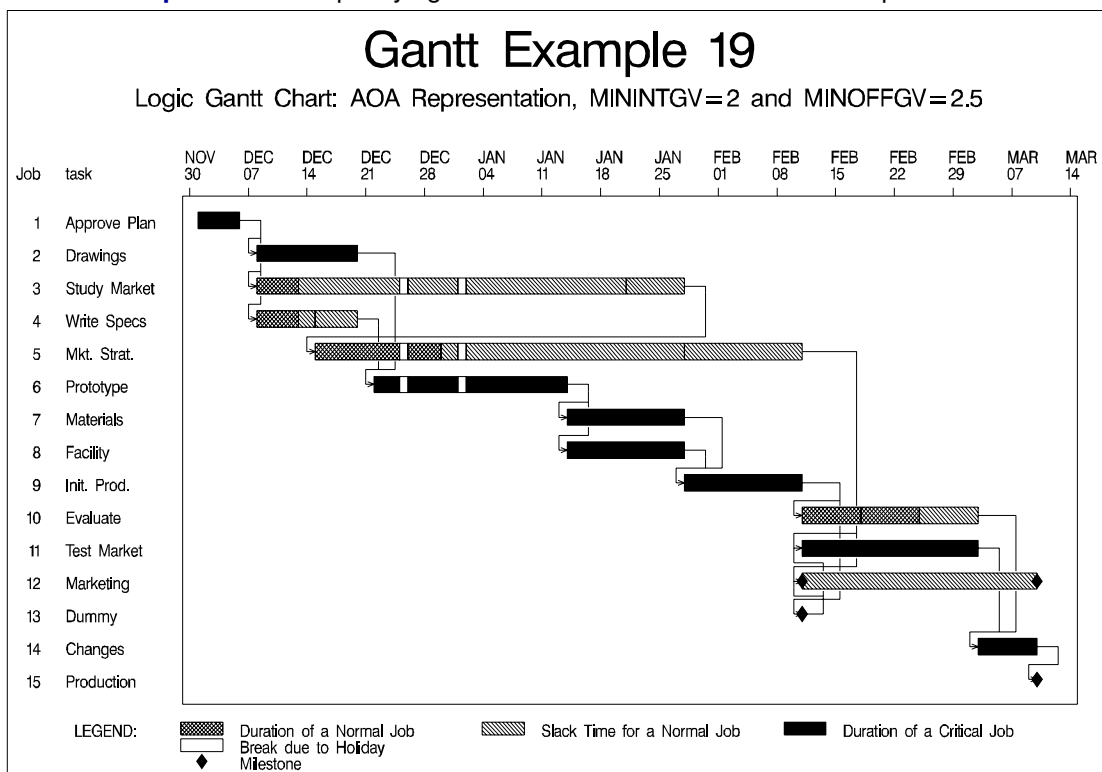
* illustrate the minintgv and minoffgv options;

title2 'Logic Gantt Chart: AOA Representation, MININTGV=2 and MINOFFGV=2.5';
proc gantt data=savehp holiday=holdata=holdata;
  chart / holiday=(hol) dur=days increment=7 compress
        caxis=black cmile=cyan cprec=blue
        head=head tail=tail
        minintgv=2.0 minoffgv=2.5;
  id task;
run;

```

Notice that now there is greater distance between vertical segments (corresponding to global verticals), and the horizontal segments leaving bars are longer.

Output 6.19.2. Specifying the MININTGV= and MINOFFGV= Options



The MAXDATE= option is specified in the remaining Gantt calls in this example in order to focus on the schedule bars of the first few activities in the chart. The next two outputs illustrate the use of the MAXDISLV= option in the CHART statement. The MAXDISLV= option is used as a safeguard to limit the feasible region made available to PROC GANTT for placement of local verticals. The value specified dictates the maximum allowable displacement of the local vertical from its ideal position, that is, at a distance of MINOFFLV= from the end of the bar with which it is associated. However, this ideal position may tend to be positioned too close to a global vertical or even coincide with one. Depending on the cell width, this can result in visual misinterpretation of the Logic Gantt chart. In order to avoid this scenario, you should specify a reasonable value for the MAXDISLV= option to permit a certain amount of freedom for local vertical placement so as to distinguish between local and global verticals. Typically, use of this option is desirable when the value of the MININTGV=

option, the minimum distance between global verticals, is relatively much greater than the value of the MAXDISLV= option.

To illustrate, consider the following Gantt call with a large MININTGV= value (10) and a relatively smaller MAXDISLV= value (0.3). Thus, for every local vertical, PROC GANTT has a very small interval that is less than a third of a cell wide in which to place that local vertical regardless of whether a global vertical runs through that interval or not. The result of this constraint is illustrated in the chart shown in [Output 6.19.3](#). The local vertical for ‘Drawings’ is positioned as far as possible from the global vertical of ‘Approve Plan,’ but the value of the MAXDISLV= option

restricts it from being positioned any further. Visually it is not pleasing, and it is difficult to distinguish the local and global verticals. A similar situation is evident with the local vertical of ‘Prototype’ and the global vertical of ‘Write Specs.’

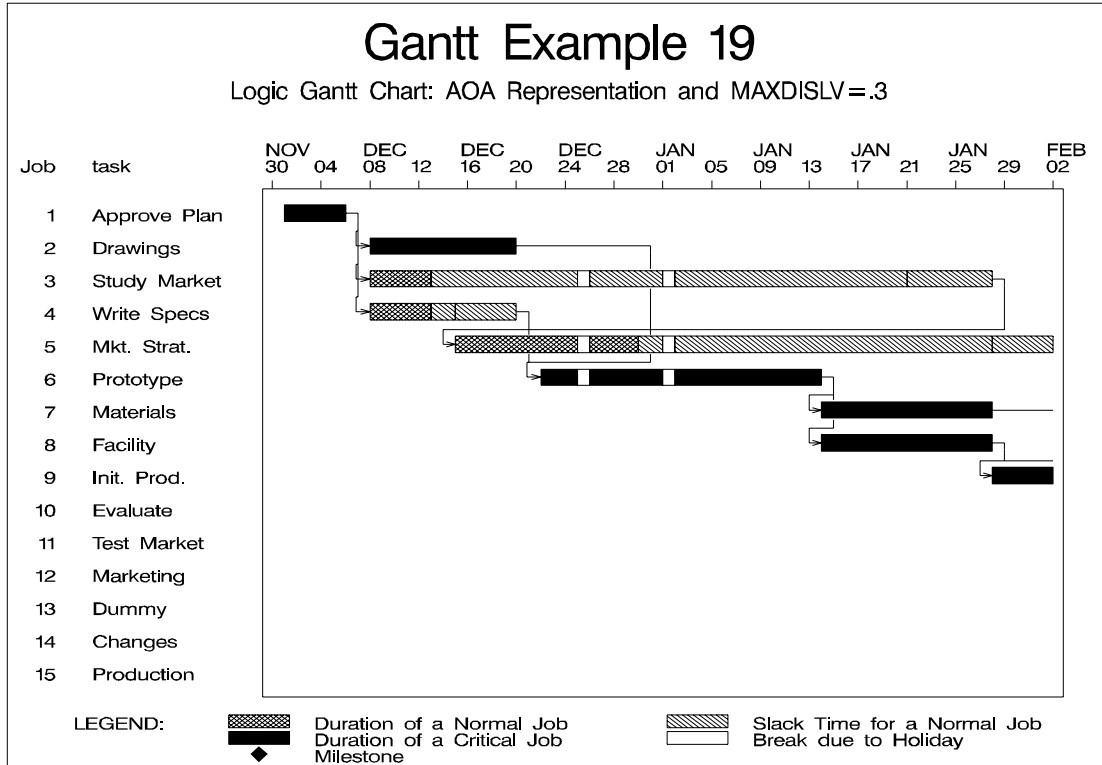
```

title2
  'Logic Gantt Chart: AOA Representation and MAXDISLV=.3';

proc gantt data=savehp holiday=holdata=holdata;
  chart / holiday=(hol) dur=days compress
        caxis=black cmile=cyan cprec=blue
        head=head tail=tail
        maxdislv=.3 minintgv=10
        maxdate='01feb04'd;
  id task;
run;

```

Output 6.19.3. Specifying the MAXDISLV= Option (I)



By reducing the value of MAXDISLV= even further, you can produce a chart that gives the appearance of a local vertical overlapping with a global vertical owing to resolution limitations of the display device. Theoretically, by design, this will never be the case. Recall that the value of the MAXDISLV= option is strictly positive and is at least one-tenth of a cell width.

The solution to this problem is to increase the value of the MAXDISLV= option so that the local vertical can be displaced further away from any adjacent global verticals. In the next invocation of PROC GANTT, the value of the MAXDISLV= option is increased to 2, resulting in a Logic Gantt chart in which the local verticals are staggered further away from nearby global verticals. This Gantt chart is displayed in [Output 6.19.4](#).

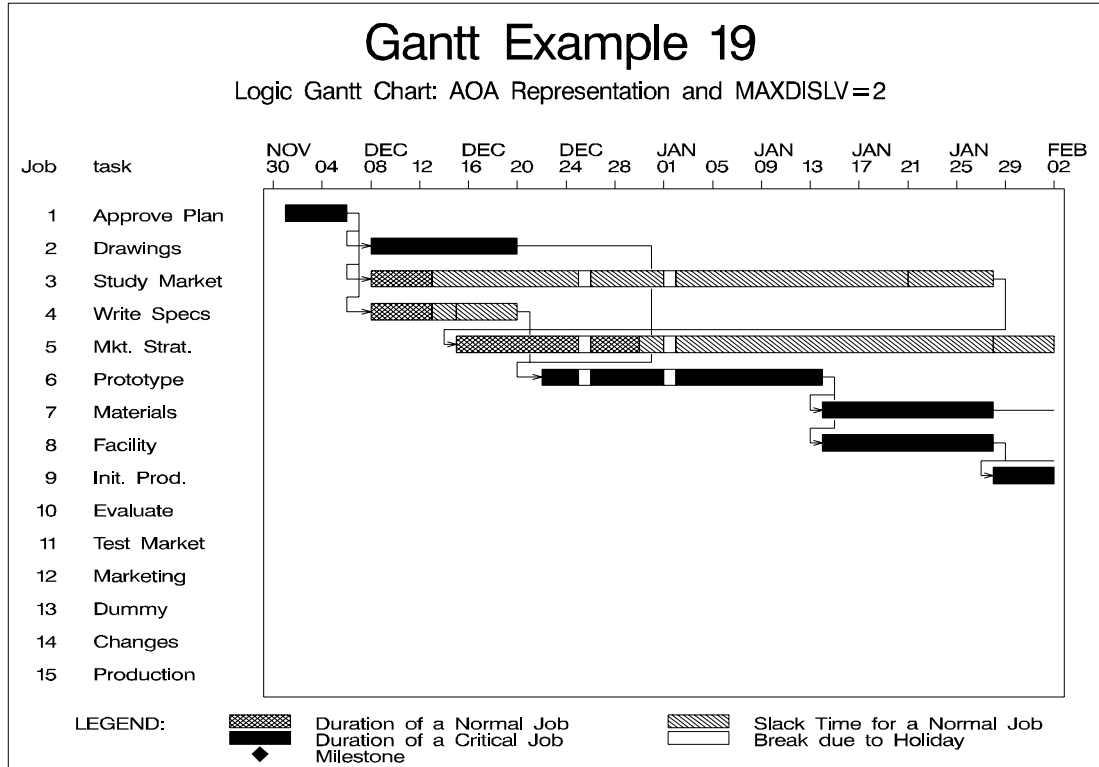
```

title2
  'Logic Gantt Chart: AOA Representation and MAXDISLV=2';

proc gantt data=savehp holidata=holdata;
  chart / holiday=(hol) dur=days compress
        caxis=black cmile=cyan cprec=blue
        head=head tail=tail
        maxdislv=2 minintgv=10
        maxdate='01feb04'd;

  id task;
run;

```

Output 6.19.4. Specifying the MAXDISLV= Option (II)

The final Gantt chart in this example illustrates the use of the MINOFFLV= option in the CHART statement. This option specifies the minimum distance of a local vertical from the end of the bar with which it is associated. Although the position corresponding to the MINOFFLV= option is the position of choice for placement of the local vertical, the actual placement can differ from this position owing to the presence of nearby global verticals, as illustrated by [Output 6.19.3](#) and [Output 6.19.4](#). The maximum amount of displacement is determined by the value of the MAXDISLV= option.

In all of the preceding charts in this example, the connection from the activity, 'Approve Plan,' to each of its three successors, 'Drawings', 'Study Market', and 'Write Specs', is a 5-segment connection similar to the type illustrated in [Figure 6.13](#). This is caused by backtracking of the activity's global vertical to the successor's local vertical as described in the "Controlling the Layout" section on page 515. To transform this connection into a 3-segment connection as shown in [Figure 6.12](#), you need to position the local vertical to the right of the global vertical. The following invocation of PROC GANTT achieves this by specifying MINOFFLV=0.5, and the resulting Gantt chart is shown in [Output 6.19.5](#). Notice that this option affects the positioning of *all* local verticals on the chart in contrast to the MAXDISLV= option, which affects only those local verticals that are close to global verticals.

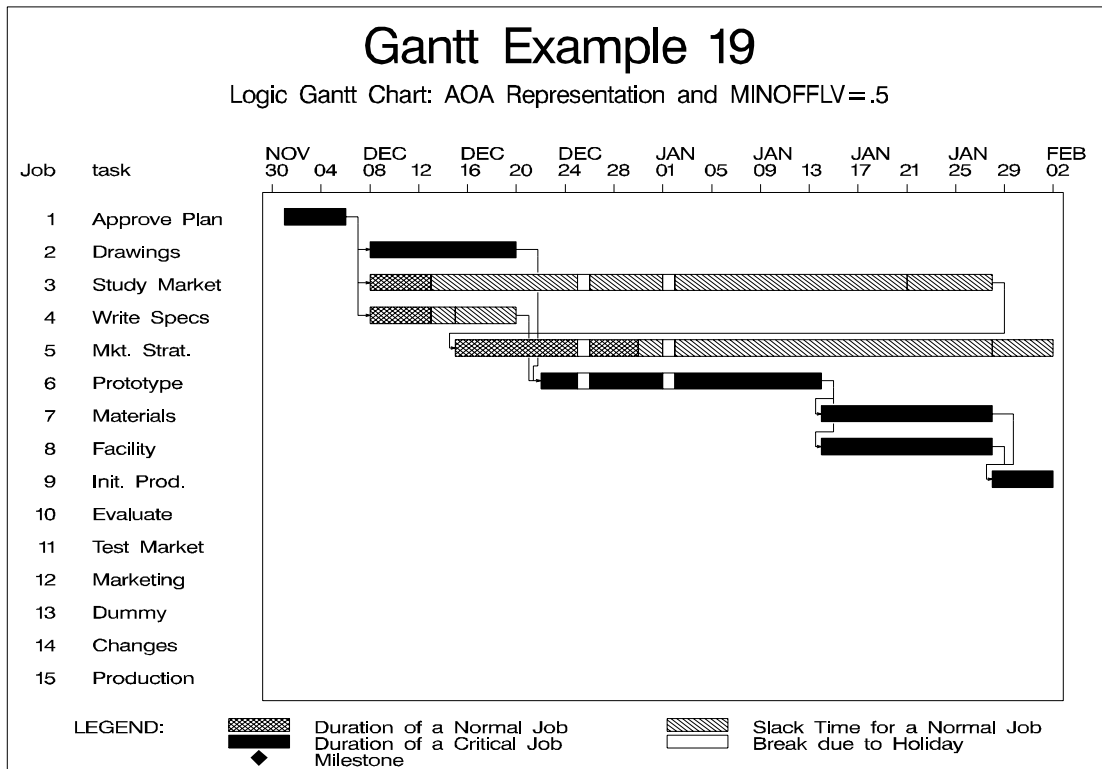
* illustrate the minofflv option;

title2

'Logic Gantt Chart: AOA Representation and MINOFFLV=.5';

```
proc gantt data=savehp holiday=holdata;
  chart / holiday=(hol) dur=days compress
  caxis=black cmile=cyan cprec=blue
  head=head tail=tail
  minofflv=.5
  maxdate='01feb04'd;
id task;
run;
```

Output 6.19.5. Specifying the MINOFFLV= Option



Example 6.20. Nonstandard Precedence Relationships

This example demonstrates the use of nonstandard precedence relationships and specification of the PRECDATA= option in the PROC GANTT statement.

The project and nonstandard precedence relationships are defined by the WIDGLAG2 data set, which is a modification of the WIDGLAG data set that was used in Example 2.11 to illustrate the CPM procedure. The activity and successor variables are represented by the TASK and SUCC variables, respectively, and the lag type of the relationship is defined by the LAGDUR variable. The LAGDUR variable defines the lag type in *keyword_duration_calendar* format for the purpose of passing the information to PROC CPM. Although PROC GANTT accepts this format for a lag variable, it does not use the *duration* and *calendar* values when drawing the connection since the schedule is already computed at this time (presumably by PROC CPM).

As in the WIDGLAG data set, the WIDGLAG2 data set specifies a Start-to-Start lag of nine days between the activity 'Prototype' and its successors, 'Materials' and 'Facility,' and a Finish-to-Start lag of two days between 'Facility' and 'Init. Prod.'. In addition, changes to the widget design are permitted to be made no earlier than six days after in-house evaluation of the product has begun. Furthermore, the Engineering department has to ensure that there will be at least three days available for any changes that need to be carried out after the test market results have come in. These constraints are incorporated in the WIDGLAG data set by setting the value of the LAGDUR variable equal to 'ss_6' for the relationship between 'Evaluate' and 'Changes' and equal to 'ff_3' for the relationship between 'Test Market' and 'Changes.'

The project is scheduled using PROC CPM subject to weekends and the holidays defined in the HOLIDAYS data set. Specifying the COLLAPSE option in the PROC CPM statement ensures that there is one observation per activity. The WIDGLAGH data set is created by deleting the successor variable from the Schedule data set produced by PROC CPM.

Since there is no precedence information contained in the WIDGLAGH data set, specifying DATA=WIDGLAGH in the PROC GANTT statement without the PRECDATA= option produces a nonprecedence Gantt chart. You can produce a Logic Gantt chart by specifying the precedence information using the PRECDATA= option in the PROC GANTT statement as long as the activity variable is common to both the schedule and Precedence data sets.

The Gantt chart shown in [Output 6.20.1](#) is produced by specifying PRECDATA=WIDGLAG2. The lag type of the precedence connections is indicated to PROC GANTT using the LAG= option in the CHART statement. The width of the precedence connections is set to 2 with the WPREC= option, and the color of the connections is set to blue using the CPREC= option. The MININTGV= and MINOFFLV= options are specified in the CHART statement in an attempt to minimize the number of 5-segment connections. A reference line with a line style of 2 is drawn at the beginning of every month by using the REF= and LREF= options in the CHART statement.

```
options ps=60 ls=100;

title f=swiss 'Gantt Example 20';

/* Activity-on-Node representation of the project with lags */
data widglag2;
  format task $12. succ $12. lagdur $4. ;
  input task & days succ & lagdur $ ;
  datalines;
Approve Plan    5  Drawings      .
Approve Plan    5  Study Market   .
Approve Plan    5  Write Specs     .
Drawings        10  Prototype     .
Study Market    5  Mkt. Strat.   .
Write Specs      5  Prototype     .
Prototype       15  Materials     ss_9
```

```

Prototype      15 Facility      ss_9
Mkt. Strat.   10 Test Market   .
Mkt. Strat.   10 Marketing     .
Materials     10 Init. Prod.    .
Facility      10 Init. Prod.    fs_2
Init. Prod.   10 Test Market   .
Init. Prod.   10 Marketing     .
Init. Prod.   10 Evaluate      .
Evaluate      10 Changes       ss_6
Test Market   15 Changes       ff_3
Changes       5 Production     .
Production    0 .              .
Marketing     0 .              .
;

data holidays;
    format holiday holifin date7.;
    input holiday & date7. holifin & date7. holidur;
datalines;
24dec03 26dec03 4
01jan04 . .
;

proc cpm data=widglag2 holidata=holidays date='1dec03'd
    interval=weekday collapse;
    activity task;
    succ      succ / lag = (lagdur);
    duration days;
    holiday   holiday / holifin=(holifin);
run;

data widglagh;
    set _last_;
    drop succ;
run;

* set background to light gray
options cback=ltgray;

* set vpos to 50 and hpos to 100;
options vpos=50 hpos=100;

title2 f=swiss
    'Nonstandard Precedence Relationships and the PRECDATA= Option';

proc gantt data=widglagh precdata=widglag2
    holidata=holidays;
    chart / compress dur=days
        holiday=(holiday) holifin=(holifin)
        cframe=ligr cmile=blue font=swiss
        ref='01dec03'd to '01mar04'd by month
        cref=black lref=2 rellabel
        act=task succ=(succ) lag=(lagdur)
        minintgv=2 minofflv=.5

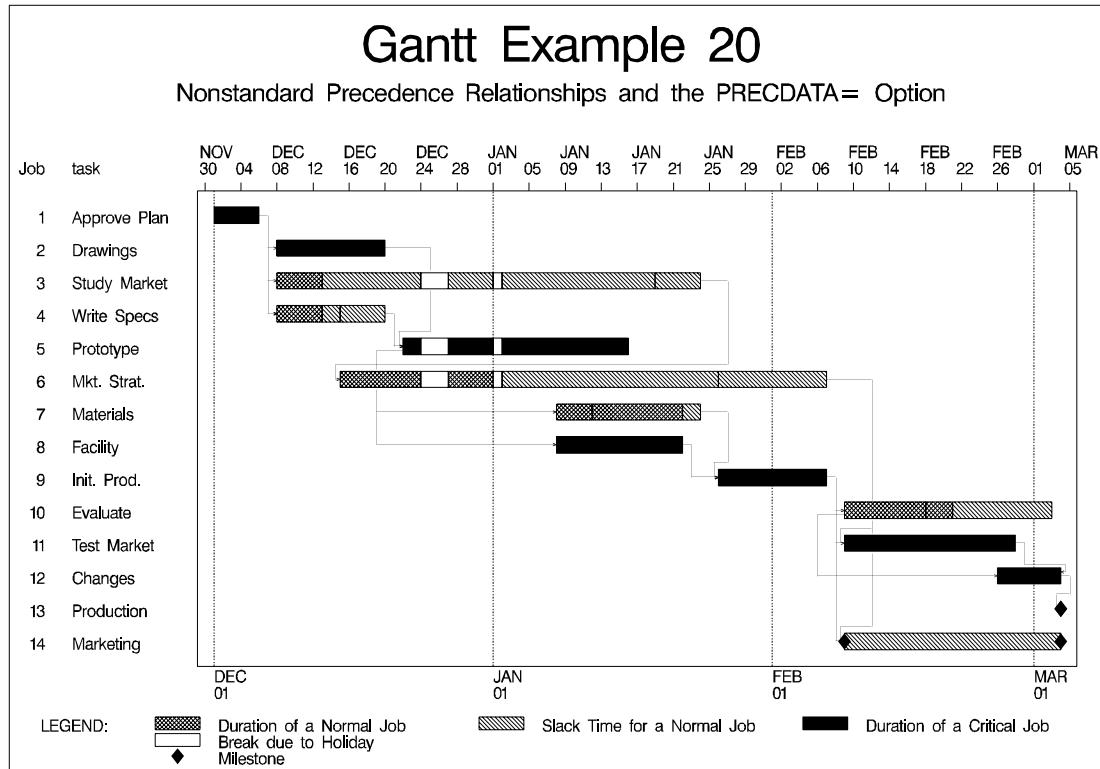
```

```

cprec=blue wprec=2;
id task;
run;

```

Output 6.20.1. Nonstandard Precedence Relationships



Example 6.21. Using the SAS/GRAPH ANNOTATE= Option

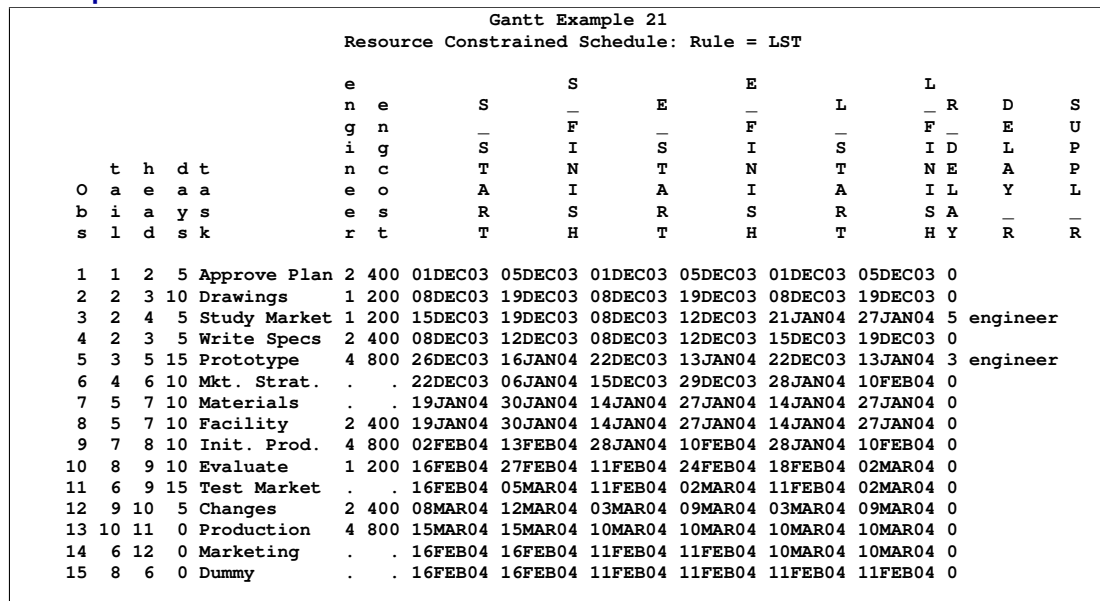
This example illustrates the use of the ANNOTATE= option to add graphics and text to the body of the Gantt chart. The intent of the first invocation of PROC GANTT is to display the resource requirements of each activity on the Gantt chart, while that of the second invocation is to plot the resource usage bar chart for the replenishable resource engineers and the resource availability curve for the consumable resource cost.

The data for this example come from [Example 2.15](#), in which the widget manufacturing project is scheduled using PROC CPM subject to resource constraints. The project network is defined in the WIDGRES data set using AOA format. The number of engineers needed per day per activity is a replenishable resource and is identified by the ENGINEER variable in the WIDGRES data set. The cost incurred per day per activity is a consumable resource and is identified by the ENGCOST variable in the WIDGRES data set. The WIDGRIN data set specifies the resource availabilities for the project. The schedule produced by PROC CPM using the default choice of LST as a heuristic is shown in [Output 6.21.1](#). The following programs assume that the schedule is stored in the WIDGSCH2 data set and that the resource usage is stored in the WIDGROU2 data set.

The Annotate macros are used in this example to simplify the process of creating Annotate observations. The ANNOMAC macro is first used to compile the Annotate macros and make them available for use. The Annotate data set ANNO1 is then created using the Annotate macros. The DCLANNO macro declares all Annotate variables except the TEXT variable, and the SYSTEM macro defines the Annotate reference system. The coordinate system defined here uses *date* for the horizontal scale and *job number* for the vertical scale. The text to be displayed contains the number of engineers required per day and the total cost over the duration of the activity. The LABEL macro is used to annotate the necessary text on the Gantt chart using the BRUSH font.

The GANTT procedure is invoked with the ANNOTATE=ANNO1 specification in the PROC GANTT statement. The resulting Gantt chart is shown in [Output 6.21.2](#). It is important to note that the job number will be used for the vertical scale even if NOJOBNUM is specified in the CHART statement.

Output 6.21.1. Resource Constrained Schedule: Rule = LST



```

title c=black f=swiss 'Gantt Example 21';
title2 c=black f=swiss
'Displaying Resource Requirements';

* set background to white and text to black;
goptions ctext=black cback=white ftext=swiss border;

* set vpos to 50 and hpos to 100;
goptions vpos=50 hpos=100;

* begin annotate process;

* compile annotate macros;
%annomac;

```

```

* create Annotate data set for first chart;
data annol;
  %dclanno;          /* set length and type for annotate vars */
  %system(2,2,4); /* define annotate reference system      */
  set widgsch2;
  length lab $20;
  length text $ 37;
  Y1 = _n_;
  lab='      ';

  if _n_=1 then do;
    %label('01dec03'd,13,
           'Format: Engineers per day, Total cost',
           *,0,0,1.2,brush,6);
  end;

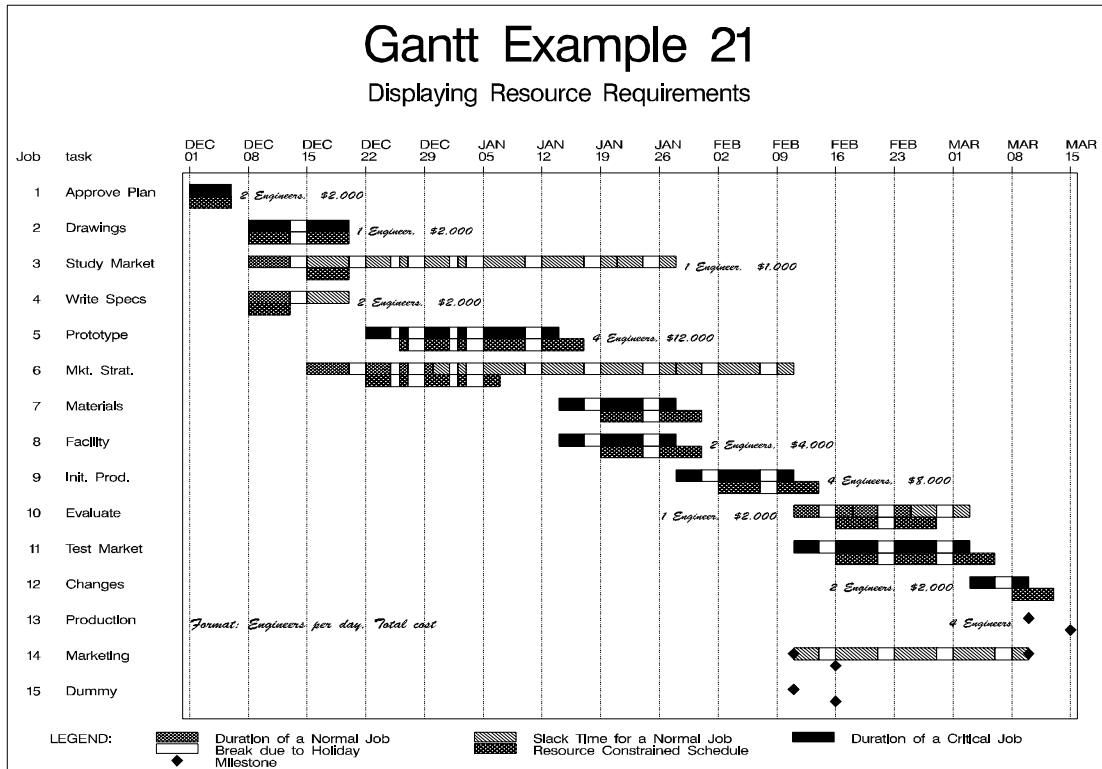
  if engineer ^= . then do;
    /* create a text label */
    lab = put(engineer, 1.) || " Engineer";
    if engineer > 1 then lab = trim(lab) || "s";
    if days > 0 then lab = trim(lab) || ", " ||
                          put(engcost*days, dollar7.);

    /* position the text label */
    if y1 < 10 then do;
      x1 = max(l_finish, s_finish) + 2;
      %label(x1,y1,lab,black,0,0,1.0,brush, 6);
    end;
    else do;
      x1 = e_start - 2;
      %label(x1,y1,lab,black,0,0,1.0,brush, 4);
    end;
  end;
end;
run;

* annotate the Gantt chart;
proc gantt data=widgsch2 holidata=holdata
  annotate=annol;
  chart / holiday=(hol) interval=weekday increment=7
        ref='1dec03'd to '21mar04'd by week
        cref=blue lref=2
        dur=days cmile=black caxis=black
        compress ;
  id task;
run;

```

Output 6.21.2. Using the ANNOTATE= Option



The next illustration of the ANNOTATE= option is to plot the resource usage bar chart for the replenishable resource engineers and the resource availability curve for the consumable resource cost. A DATA step determines the largest value of the cost availability throughout the life of the project in order to scale the costs accordingly. The CSCALE macro variable is required to represent cost availabilities on the Gantt chart. Since there are no further cash inflows after December 1, 2003, and there are 15 jobs represented on the chart, the value of the macro variable CSCALE is $(15 - 1)/40000$.

An Annotate data set, ANNO2, is created in much the same fashion as ANNO1, but it employs some additional macros. The BAR macro is used to draw the resource usage bar chart, and the DRAW and MOVE macros are used to draw the resource availability curve. The PUSH and POP macros are used as necessary to store and retrieve the last used coordinates from the stack, respectively. The resulting Gantt chart is displayed in [Output 6.21.3](#).

```

title2 c=black f=swiss
      'Plotting Resource Usage and Resource Availability';

* calculate scaling factor for cost curve;
data _null_;
  set widgrou2 end=final;
  retain maxcost;
  if aengcost > maxcost then maxcost=aengcost;
  if final then call symput('cscale', 14/maxcost);
run;

```

```

* create Annotate data set for second chart;
data anno2;
  %dclanno;          /* set length and type for annotate vars */
  %system(2,2,4); /* define annotate reference system      */
  set widgrou2;
  length lab $16;
  length text $27;
  x1=_time_;
  y1=15-aengcost*symget('cscale');
  y2=15-rengineer;
  lab='      ';

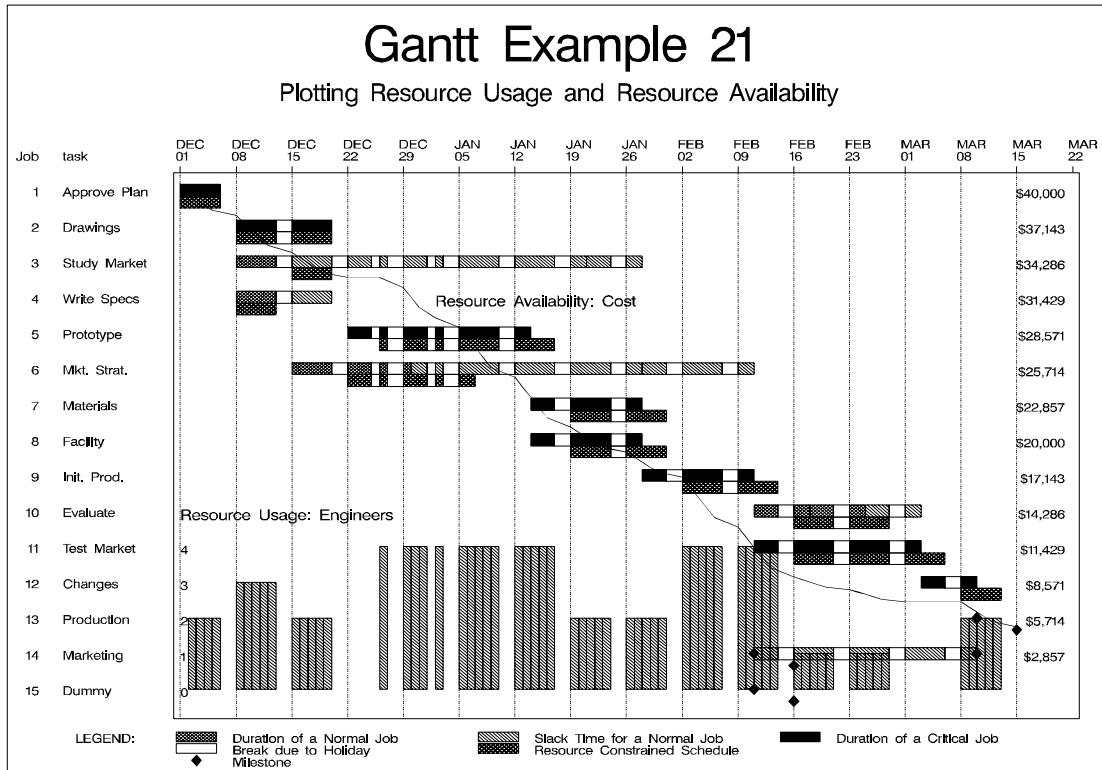
  if _n_=1 then do;
    /* print labels */
    do i = 1 to 14 by 1;
      lab=put( (15-i) / symget('cscale'), dollar7.);
      %label('21mar04'd,i,lab,black,0,0,1.0,swiss,4);
    end;
    do i = 0 to 4 by 1;
      lab=put(i,1. );
      %label('01dec03'd,15-i,lab,black,0,0,1.0,swiss,6);
    end;
    %label('01dec03'd,10,'Resource Usage: Engineers',
           *,0,0,1.2,swiss,6);
    %label('02jan04'd,4,'Resource Availability: Cost',
           *,0,0,1.2,swiss,6);
    %move(x1,y1);
    %push;
  end;
  else do;
    /* draw cost availability curve */
    %pop;
    when='a';
    %draw(x1,y1,black,1,2);
    %push;
    /* draw engineer usage barchart */
    when='b';
    if y2 <= 14 then do;
      %bar(x1,15,x1+1,y2,blue,0,11);
    end;
  end;
end;
run;

* annotate the Gantt chart;
proc gantt data=widgsch2 holidata=holdata
  annotate=anno2;
  chart / holiday=(hol) interval=weekday increment=7
  mindate='1dec03'd maxdate='21mar04'd
  ref='1dec03'd to '21mar04'd by week
  cref=blue lref=2
  dur=days cmile=black caxis=black
  compress;
  id task;

```

run;

Output 6.21.3. Using the ANNOTATE= Option



Example 6.22. Using the Automatic Text Annotation Feature

The following example is a subproject of a larger project involving the the maintenance of a pipeline and steam calender (Moder, Phillips, and Davis 1983), and it illustrates the automatic text annotation feature of the GANTT procedure. The SHUTDOWN data set is input as the activity data set to PROC CPM, and the project is scheduled to begin on June 1, 2004. PROC GANTT is used to produce a Gantt chart of the resulting schedule with the data set LABELS specified as a Label data set; the output is shown in Output 6.22.1. The LABVAR= option in the CHART statement specifies the ACT variable as the common linking variable. The LABSPLIT= option is specified in order to prevent the labels from splitting on embedded blanks.

The first observation in the LABELS data set causes the value of the ACT variable to be displayed at the E_START time for every activity in the project. The value of _YOFFSET='-.2' positions the baseline of the displayed text at 0.2 barheights above the top of the first bar for the activity. Similarly the second observation displays the ID variable at the E_START time for each activity with the baseline positioned at 0.8 barheights below the bottom of the first bar for the activity. The heights for both these strings is 1 barheight. The next two observations in the LABELS data set display the symbols corresponding to the values 'N' and 'M' in the ORFONT font, rotated at an angle of 90 degrees, beside the milestones corresponding to the deactivation and activation of the calender, respectively. Observations 5 and 6 indicate the start and

finish of the “Maintenance Period” by displaying the indicated strings rotated 90 degrees at the start and finish times of the activity ‘Repair Calender.’ Finally, the last three observations provide headings for each of the three distinct regions on the chart. The `_JLABEL` variable is used along with the `_XVAR` variable to place the strings in the regions defined by the start and finish times of the ‘Repair Calender’ activity.

It should be noted that since the plot times are linked to variables rather than absolute values, the Label data set need not be changed even if the project is rescheduled. This is a convenient feature when monitoring a project in progress, since the annotation automatically places the labels at the appropriate times.

```

title c=black f=swiss 'Gantt Example 22';

data shutdown;
  input act succ id & $20. dur;
  datalines;
1100 1110 Start Project          0
1110 1120 Procure Pipe          10
1120 1130 Prefab Pipe Sections  5
1130 1140 Deactivate Calender   0
1140 1150 Position New Pipe     1
1150 1160 Start Disassembly     0
1160 1170 Disassemble Calender  2
1170 1200 Finish Disassembly    0
1200 1300 Repair Calender       10
1300 1310 Start Assembly        0
1310 1320 Reassemble Calender   3
1320 1330 Finish Assembly       0
1330 1340 Connect Pipes         2
1340 1350 Adjust and Balance    1
1350 1360 Activate Calender     0
1360 1370 System Testing        1
1370 .   Finish Project         0
;

proc cpm data=shutdown date='01jun04'd interval=day
  out=sched;
  act act;
  succ succ;
  dur dur;
  id id;
run;

data labels;
  input act _y _xvar $ _lvar $ _yoffset _xoffset _label & $25.
  _alabel _hlabel _jlabel $ _flabel $ ;
  datalines;
.   -1 e_start act -.3 0 .   0 1.5 . .
.   -1 e_start id  2.3 0 .   0 1.5 . .
1130 . e_start .   1.5 -1 N   90  2 L orfont
1350 . e_finish .   1.5  5 M   90  2 L orfont
1200 17 e_start .   2.5  1 Start Maintenance Period 90  2 . swiss
1200 17 e_finish .   2.5 .5 Finish Maintenance Period 90  2 . swiss

```

```

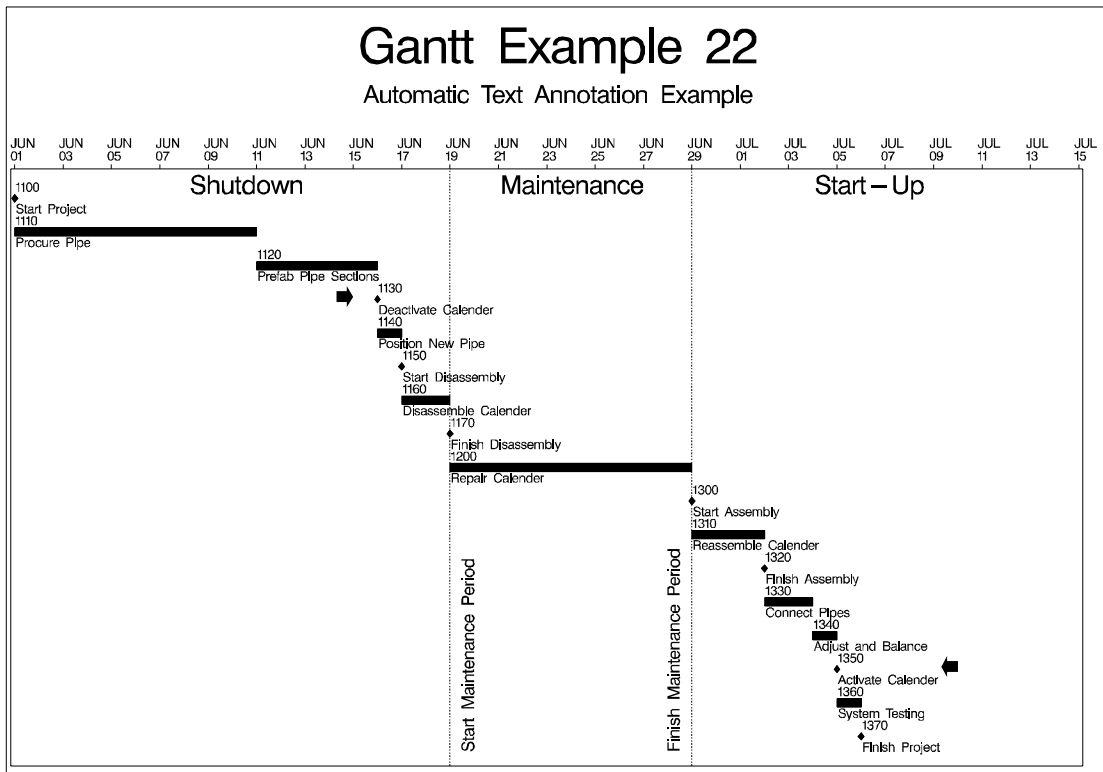
1200 1 e_start . . -6 Shutdown 0 3 R .
1200 1 e_start . . 2 Maintenance 0 3 L .
1200 1 e_finish . . 6 Start-Up 0 3 L .
;

title2 f=swiss 'Automatic Text Annotation Example';
proc gantt data=sched labdata=labels maxdec=0;
  chart / pcompress nolegend nojobnum dur=dur
  mininterval=day scale=5
  height=1.5 font=swiss
  skip=3 maxdate='14jul04'd
  labvar=act labsplit='/'
  ref='19jun04'd '29jun04'd lref=20
;

run;

```

Output 6.22.1. Using the LABDATA= Option



Example 6.23. Multiproject Gantt Charts

The following example illustrates an application of the PATTERN variable to display summary bars for subprojects. The LAN Selection Project (Bostwick 1986) consists of eight subprojects, two of which represent the beginning and ending of the master project. The data set LANACT defines the structure of the project. The ACT and SUCC variables define the precedence relationships, the PARENT variable defines the parent task, and the DAYS variable contains the duration of the activity.

The project is scheduled using the CPM procedure with a PARENT statement to identify the parent. The schedule data set, SCHED, is created by appending a

`_PATTERN` variable to the output data set generated by CPM. The value of this variable is set to '4,' corresponding to subprojects, and set to missing otherwise. This results in the subproject bars being filled using `PATTERN4`, namely a solid black pattern. The `ACTID` variable is indented within the `DATA` step to reflect the level of each activity in the project hierarchy when used as the `ID` variable.

A Label data set, `LABELS`, is created in order to add markers to both ends of the schedule bars that correspond to subprojects. The two observations in the `LABELS` data set are linked to the `SCHED` data set with the `_PATTERN` variable.

The GANTT procedure is next invoked to produce the Gantt chart in [Output 6.23.1](#). The `LABVAR=_PATTERN` specification establishes the link between the Schedule and Label data sets. The `ACT=` and `SUCC=` options are used to display the precedence relationships between activities.

```

pattern1 c=black v=r1;          /* Non-critical duration */
pattern2 c=black v=e;          /* Slack duration      */
pattern3 c=black v=x1;        /* Critical duration    */
pattern4 c=black v=s;          /* Project duration     */

data lanact;
  format act $30. succ $30. parent $20.;
  input act & succ & parent & days;
  datalines;
Measure Current Volume      Forecast Future Volume      NEEDS ASSESSMENT          2
Literature Survey           Manufacturer Demos           MARKET SURVEY            5
Determine Current Users    Forecast Future Needs       NEEDS ASSESSMENT          2
Forecast Future Volume     Prepare Network Spec        NEEDS ASSESSMENT          2
Manufacturer Demos         Identify Vendors            MARKET SURVEY            5
Forecast Future Needs     Prepare Network Spec        NEEDS ASSESSMENT          2
Identify Vendors           .                            MARKET SURVEY            2
Prepare Network Spec      .                            NEEDS ASSESSMENT          2
Prepare RFQ                Evaluate Vendor Responses    VENDOR SELECTION          4
Prepare Cable Plan         Procure Cable                SITE PREPARATION          4
Evaluate Vendor Responses  Notify Final Candidate      VENDOR SELECTION          15
Procure Cable              Install Cable                SITE PREPARATION          22
Notify Final Candidate     Negotiate Price/Config      VENDOR SELECTION          1
Install Cable              .                            SITE PREPARATION          10
Negotiate Price/Config    Prepare Purchase Order      VENDOR SELECTION          3
Prepare Purchase Order    .                            VENDOR SELECTION          1
Server Functional Spec    Server Detail Design        SPECIAL HARDWARE          5
Procure LAN Hardware      Receive Network Hardware    NETWORK INSTALLATION      25
Server Detail Design      Server Coding                SPECIAL HARDWARE          10
Receive Network Hardware  Install LAN Hardware        NETWORK INSTALLATION       4
Server Coding             Test Server Code            SPECIAL HARDWARE          10
Install LAN Hardware      Test Network                 NETWORK INSTALLATION       7
Test Server Code          Install/Integrate Server    SPECIAL HARDWARE          5
Test Network              .                            NETWORK INSTALLATION       5
Install/Integrate Server  .                            SPECIAL HARDWARE          2
BEGIN PROCUREMENT        NEEDS ASSESSMENT           .                          .
BEGIN PROCUREMENT        MARKET SURVEY              .                          .
NEEDS ASSESSMENT         VENDOR SELECTION           .                          .
NEEDS ASSESSMENT         SITE PREPARATION           .                          .
MARKET SURVEY            Prepare Network Spec        .                          .
VENDOR SELECTION          NETWORK INSTALLATION        .                          .
VENDOR SELECTION         SPECIAL HARDWARE            .                          .

```



```

SITE PREPARATION          Install LAN Hardware      .
NETWORK INSTALLATION     NETWORK AVAILABLE      .
SPECIAL HARDWARE        NETWORK AVAILABLE      .
;

proc sort data=lanact;
  by act;
run;

proc cpm data=lanact out=lanout
  expand interval=workday date='03nov03'd;
  parent parent / wbs eso;
  activity act;
  duration days;
  successor succ;
run;

/* create the schedule data set with a pattern variable */
data sched;
  label wbs_code= 'WBS';
  label act='Project/Activity';
  set lanout;
  if proj_lev !0 then do;
    if parent=' ' then _pattern=4;
    actid=act;
    do i=1 to proj_lev-1; /* indent the id values */
      actid = "  " || actid;
    end;
    output;
  end;
;

proc sort data=sched;
  by es_asc wbs_code;
run;

/* create the label data set */
data labels;
  _pattern=4;
  _flabel='orfont';
  _jlabel='c';
  _yoffset=0.925;
  _label='Z';
  _xvar='e_start ';
  output;
  _xvar='l_finish';
  output;
;

title1 f=swiss 'Gantt Example 23';
title2 f=swiss 'Displaying Summary Bars For Each Subproject';

proc gantt data=sched labdata=labels;
  id actid wbs_code;
  chart / pcompress nojobnum increment=7 scale=1.5
  ctext=black caxis=black font=swiss
  mindate='01nov03'd maxdate='29feb04'd
  labvar=_pattern

```

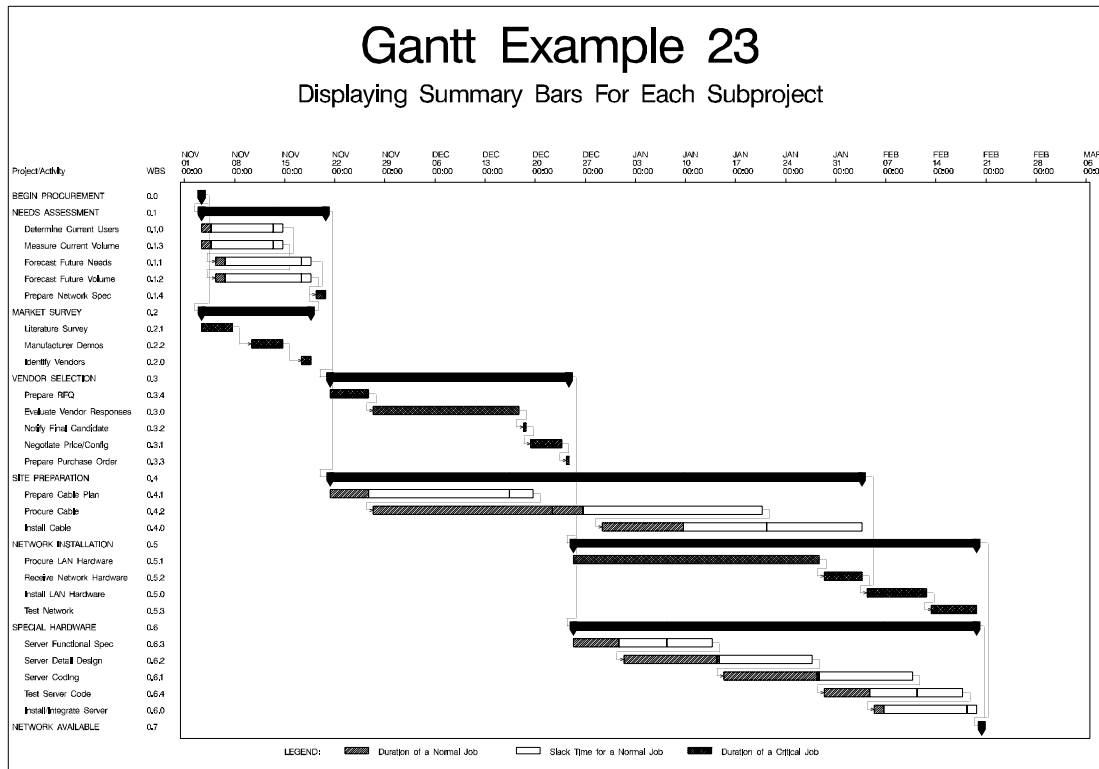
```

minoffgv=1.5 minofflv=1.5 cprec=black wprec=3
act=act succ=succ;

run;

```

Output 6.23.1. Using the PATTERN Variable and Labels



Example 6.24. Multisegment Gantt Charts

The following is a simple example that illustrates the generation of multisegmented Gantt charts. The SCHED data set identifies the city, the arrival time, and the departure time for each of four traveling salespeople. In addition, a `_PATTERN` variable is used to identify the pattern to be used for drawing the bar. The objective is to display the complete schedule for each sales person on a single row. This would require displaying several bars on a single row, each bar corresponding to the time spent in a city. In order to do this, you need first to sort the SCHED data set by Salesperson and Arrival Time and then to add a `SEGMENT_NO` variable that identifies the number of the segment that, in this case, is the order in which the salesperson visits the city. The resulting data set, NEWSCHED, is shown in [Output 6.24.1](#). You next create the LABELS data set in order to identify the names of the cities above the bars; the resulting Gantt chart is shown in [Output 6.24.2](#).

Notice that each bar is drawn using the pattern identified by the `_PATTERN` variable in the SCHED data set. In the absence of the `_PATTERN` variable, the pattern associated with the resource-constrained schedule would have been used for all the bars. This is the same mechanism that produced the split segments in [Example 6.13](#) although the `SEGMENT_NO` variable in this case was automatically created by the CPM procedure.

```

title1 'Gantt Example 24';
title2 f=swiss 'Schedule of Cities Visited by Salesperson';

data sched;
  format city $12. from to date7. ;
  input person $ city & from & date7. to & date7. _pattern;
  datalines;
Clark   New York      01May04  03May04  10
Clark   Boston        06May04  09May04  11
Clark   Wisconsin     12May04  15May04  12
Clark   Chicago       18May04  24May04  13
Clark   New York      28May04  02Jun04  10
Stevens Charlotte     02May04  04May04  14
Stevens Atlanta       08May04  10May04  15
Stevens Dallas        12May04  15May04  16
Stevens Denver        17May04  20May04  17
Stevens Nashville     27May04  02Jun04  18
Stevens Charlotte     04Jun04  06Jun04  14
Jackson Los Angeles   01May04  08May04  19
Jackson Las Vegas     11May04  18May04  20
Jackson Portland      21May04  23May04  21
Jackson Seattle       25May04  29May04  22
Rogers   Miami         02May04  07May04  23
Rogers   Tampa         11May04  15May04  24
Rogers   New Orleans   18May04  24May04  25
Rogers   Houston      28May04  01Jun04  26
;

/* Sort data by person, from */
proc sort data=sched;
  by person from;
run;

/* Add Segmt_no variable */
data newsched;
  set sched;
  retain segmt_no;
  if person ne lag(person) then segmt_no=1;
  else segmt_no = segmt_no + 1;
  output;
run;

proc print data=sched;
  run;

data labels;
  _y=-1;
  _lvar="city";
  _xvar="from";
  _flabel="swiss";
  _hlabel=0.75;
  _yoffset = -.2;
run;

pattern1 v=s r=25;

proc gantt data=newsched labdata=labels;
  id person;

```

```

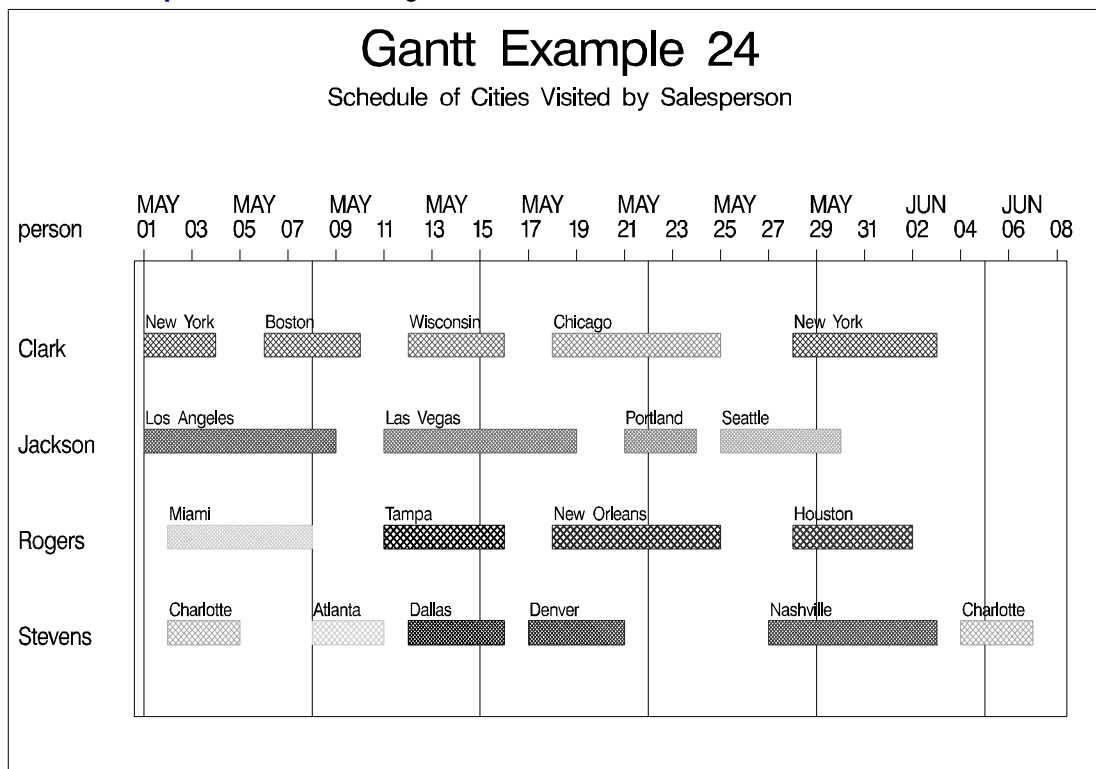
chart / ss=from sf=to compress labsplit='.' scale=2
      nolegend nojobnum skip=3 font=swiss
      ref='01may04'd to '30jun04'd by week;
run;

```

Output 6.24.1. NEWSCHED Data Set

Data NEWSCHED						
Obs	city	from	to	person	_pattern	segmt_no
1	New York	01MAY04	03MAY04	Clark	10	1
2	Boston	06MAY04	09MAY04	Clark	11	2
3	Wisconsin	12MAY04	15MAY04	Clark	12	3
4	Chicago	18MAY04	24MAY04	Clark	13	4
5	New York	28MAY04	02JUN04	Clark	10	5
6	Los Angeles	01MAY04	08MAY04	Jackson	19	1
7	Las Vegas	11MAY04	18MAY04	Jackson	20	2
8	Portland	21MAY04	23MAY04	Jackson	21	3
9	Seattle	25MAY04	29MAY04	Jackson	22	4
10	Miami	02MAY04	07MAY04	Rogers	23	1
11	Tampa	11MAY04	15MAY04	Rogers	24	2
12	New Orleans	18MAY04	24MAY04	Rogers	25	3
13	Houston	28MAY04	01JUN04	Rogers	26	4
14	Charlotte	02MAY04	04MAY04	Stevens	14	1
15	Atlanta	08MAY04	10MAY04	Stevens	15	2
16	Dallas	12MAY04	15MAY04	Stevens	16	3
17	Denver	17MAY04	20MAY04	Stevens	17	4
18	Nashville	27MAY04	02JUN04	Stevens	18	5
19	Charlotte	04JUN04	06JUN04	Stevens	14	6

Output 6.24.2. Multisegment Gantt Chart



Example 6.25. Zoned Gantt Charts

Example 6.15 illustrated the use of BY processing with the GANTT procedure to present separate Gantt charts for each department. Alternatively, you can use a zoned Gantt chart to display each of the departmental schedules on the same chart with the different department schedules separated by horizontal zone lines running across the chart. The ZONE variable divides the Activity axis into distinct zones. Activities with the same value of the ZONE variable belong to the same zone. This example produces a zoned Gantt chart using the schedule data from Example 6.15. The ZONE=DEPT specification in the CHART statement identifies the DEPT variable as the ZONE variable. The ONEZONEVAL option specifies that the value of the ZONE variable be displayed only when beginning new zones. The resulting Gantt chart is shown in Output 6.25.1. You can customize the color, style and width of the zone line by using the CZONE=, LZONE=, and WZONE= options, respectively. You can also control the span and offset of the zone line by specifying the ZONESPAN= and ZONEOFF= options, respectively, in the CHART statement.

```

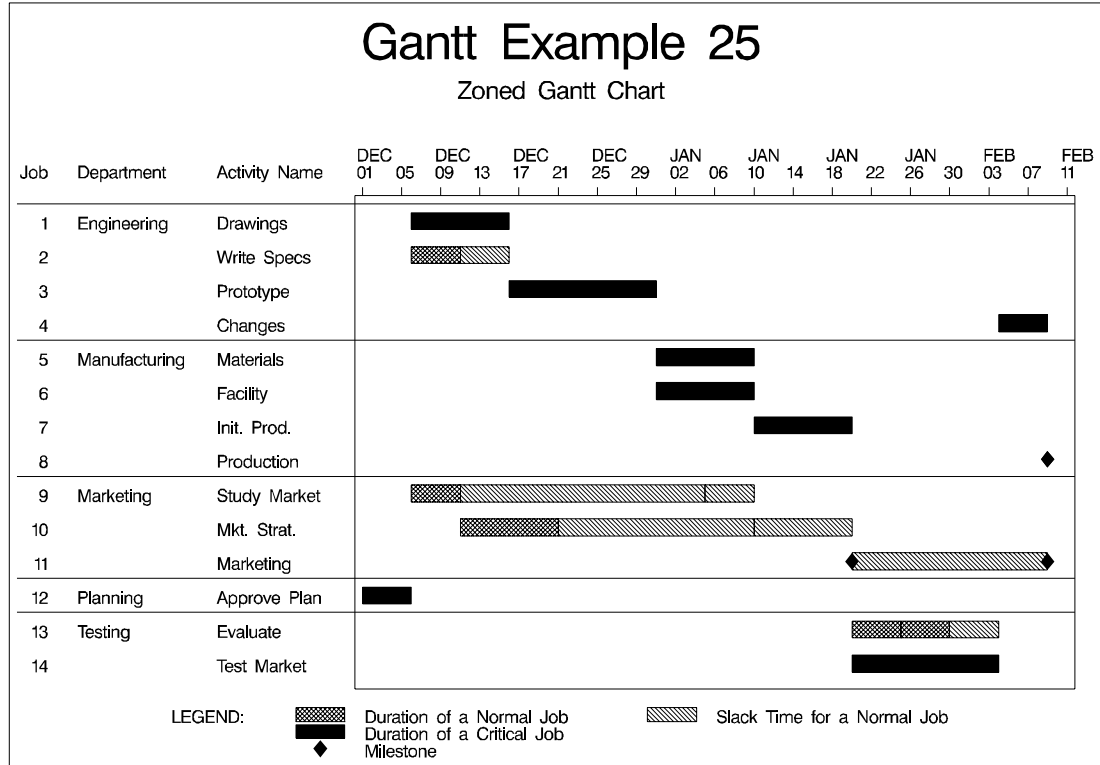
title1 'Gantt Example 25';
proc cpm date='01dec03'd data=widgetn;
    activity task;
    duration days;
    successor succ1 succ2 succ3;
    id dept;
run;

proc sort;
    by dept e_start;
run;

title2 f=swiss 'Zoned Gantt Chart';

proc gantt split='/';
    chart / pcompress scale=1 dur=days
           mindate='01dec03'd maxdate='11feb04'd
           font=swiss
           zone=dept onezoneval;
    id task;
run;

```

Output 6.25.1. Gantt Charts Zoned by Department

Example 6.26. Web-Enabled Gantt Charts

This example illustrates the process of “Web-enabling” your Gantt charts. This feature enables you to associate a URL with each activity on a Gantt chart. By using this feature together with SAS/IntrNet software, you can develop some very powerful Project Management applications. SAS/IntrNet software provides you with the capability to perform data set queries and execute SAS applications in real time and view the results in HTML format using a Web browser.

This example takes advantage of the Output Delivery System (ODS) HTML statement to create a very simple “drill-down” Gantt application beginning from a summary Gantt chart of the “top level” projects in [Example 6.23](#). The objective is to display a detailed Gantt chart of the activities in a subproject when you click on the subproject bar.

In order to be able to click on an activity and invoke an action, you need to add variables to the schedule data set that associate a URL with each of the activities that you want linked. The following code adds the `WEBVAR` and `WEBVAR2` variables to the `LANOUT` data set in [Example 6.23](#) to create the `LANWEB` data set. The `WEBVAR` variable uses the `ALT=` portion to identify information about an activity’s schedule that is to be displayed when the mouse hovers over the schedule bar. In addition, it uses the `HREF=` portion to associate the URL with the linked activity. The `WEBVAR2` variable uses only the `ALT=` portion, so information in the detailed Gantt chart can still be displayed by hovering over the schedule bars.

The `LANWEB` data set is then sorted by the `WBS_CODE` variable.

```

data lanweb;
  set lanout;
  length webvar $500;
  length webvar2 $500;

  /* WEBVAR is for the top-level summary chart */
webvar='alt=' || quote(
  'Activity: ' || trim(left(act)) || '0D'x||
  '-----' || '0D'x||
  'Early Start: ' || put(e_start, datetime.) || '0D'x||
  'Early Finish: ' || put(e_finish, datetime.) || '0D'x||
  'Late Start: ' || put(l_start, datetime.) || '0D'x||
  'Late Finish: ' || put(l_finish, datetime.) ||
  ' HREF=#' || trim(wbs_code) /* link to the anchors */
);

  /* WEBVAR2 is for the detailed charts */
webvar2='alt=' || quote(
  'Activity: ' || trim(left(act)) || '0D'x||
  '-----' || '0D'x||
  'Early Start: ' || put(e_start, datetime.) || '0D'x||
  'Early Finish: ' || put(e_finish, datetime.) || '0D'x||
  'Late Start: ' || put(l_start, datetime.) || '0D'x||
  'Late Finish: ' || put(l_finish, datetime.)
);
run;

proc sort data=lanweb;
  by wbs_code;
run;

```

Before creating the charts, you need to specify that the GIF driver be used to create graphics output. ODS HTML output always creates a “body” file, which is a single HTML document containing the output from one or more procedures and is specified using the FILE= option in the ODS HTML statement.

```

options reset=all device=gif;

ods html file="Gantt_Sum.html";

```

For example, when you click on any of the schedule bars for an activity with WBS_CODE='0.2', you link to an anchor labeled '0.2' in the body file Gantt_Sum.html.

You are now ready to create the summary Gantt chart. You identify the WEBVAR variable to the GANTT procedure using the HTML= option in the CHART statement and invoke the procedure using a WHERE clause to produce a Gantt chart of the top-level activities.

```

/* Create the Summary Gantt Chart with Drill Down Action */
pattern1 c=green v=s; /* Non-critical duration */

```

```

pattern2 c=green v=e;          /* Slack duration      */
pattern3 c=red    v=s;          /* Critical duration   */

title1 f=swiss 'Gantt Example 26';
title2 f=swiss 'Project Summary Gantt Chart';

proc gantt data=lanweb;
  id act wbs_code;
  where proj_lev=1;
  label act='SUBPROJECT' wbs_code='WBS CODE';
  chart / pcompress nojobnum font=swiss
    duration=days
    mininterval=week scale=2.5
    mindate='30oct03'd maxdate='29feb04'd
    ref='30oct03:00:00'dt to '01mar04:00:00'dt by dtmonth
    rellabel
    cmile=black
    html=webvar
    act=act succ=succ wprec=3;
run;

```

The graph that is displayed when you click on one of the subprojects is determined by the name of the anchor that has been defined for the subproject. Before creating these graphs, you need to define the anchor name in an ODS HTML statement using the ANCHOR= option to add the anchor to the HTML body file. Since you have to create a chart for each subproject, you can automate this process by using a SAS macro.

```

/* Define the macro to generate the detail charts */
%macro gandet(wbs);

  goptions device=gif;
  ods html anchor=&wbs;

  title1 f=swiss 'Gantt Example 26';
  title2 f=swiss "Detail Gantt Chart for WBS="&wbs;

  proc gantt data=lanweb;
    id act wbs_code;
    where index(wbs_code,&wbs)=1;
    label act='SUBPROJECT' wbs_code='WBS CODE';
    chart / pcompress nojobnum font=swiss
      duration=days
      mininterval=week scale=2.5
      mindate='30oct03'd maxdate='29feb04'd
      ref='30oct03:00:00'dt to '01mar04:00:00'dt by dtmonth
      rellabel html=webvar2
      act=act succ=succ wprec=3;
  run;
%mend;

/* Generate each of the detail Gantt Charts */
%gandet('0.1');

```



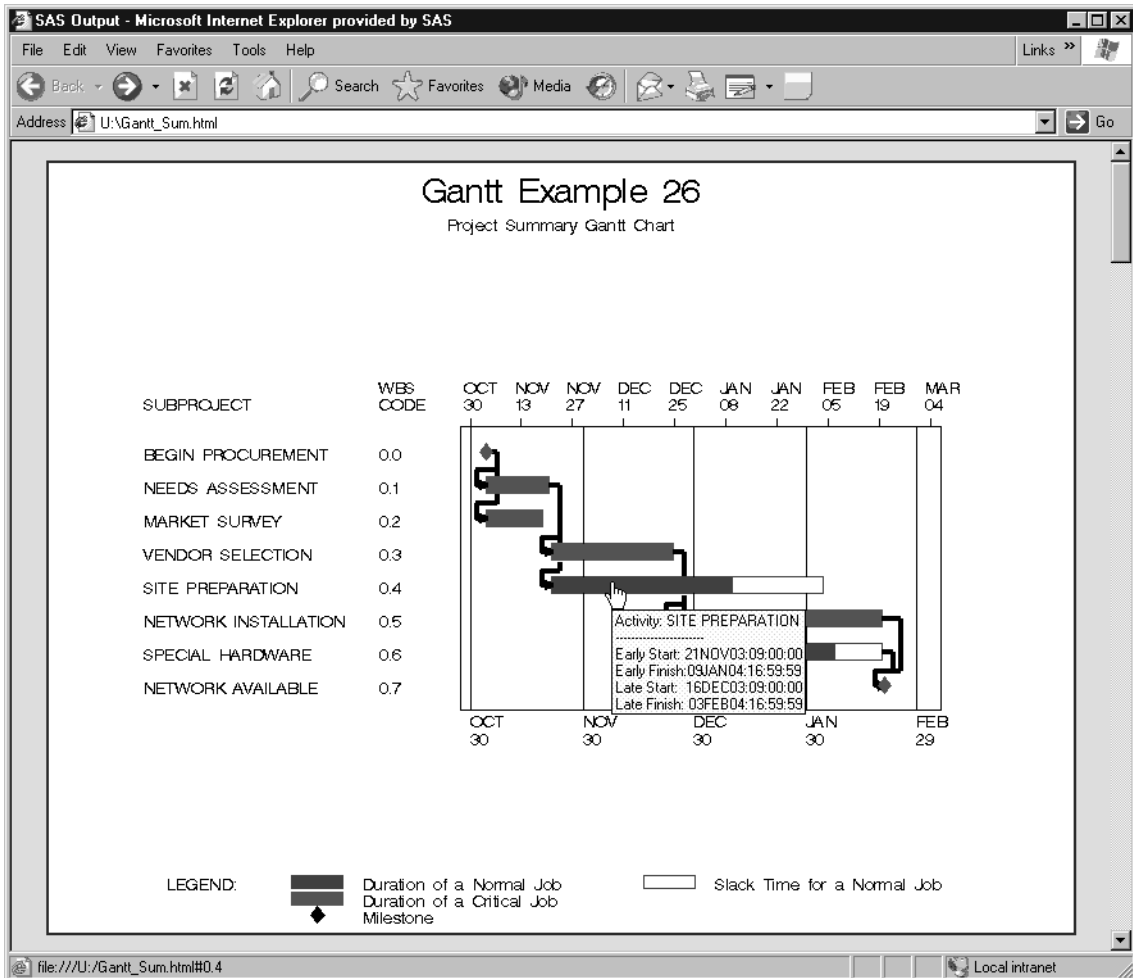
```
%gandet (' 0.2' );
%gandet (' 0.3' );
%gandet (' 0.4' );
%gandet (' 0.5' );
%gandet (' 0.6' );
```

Finally, use the ODS HTML CLOSE statement to close the body file and stop generating HTML output.

```
ods html close;
```

After you have closed the body file, you can display it in a browser window, as shown in Output 6.26.1, to view the output generated by this example.

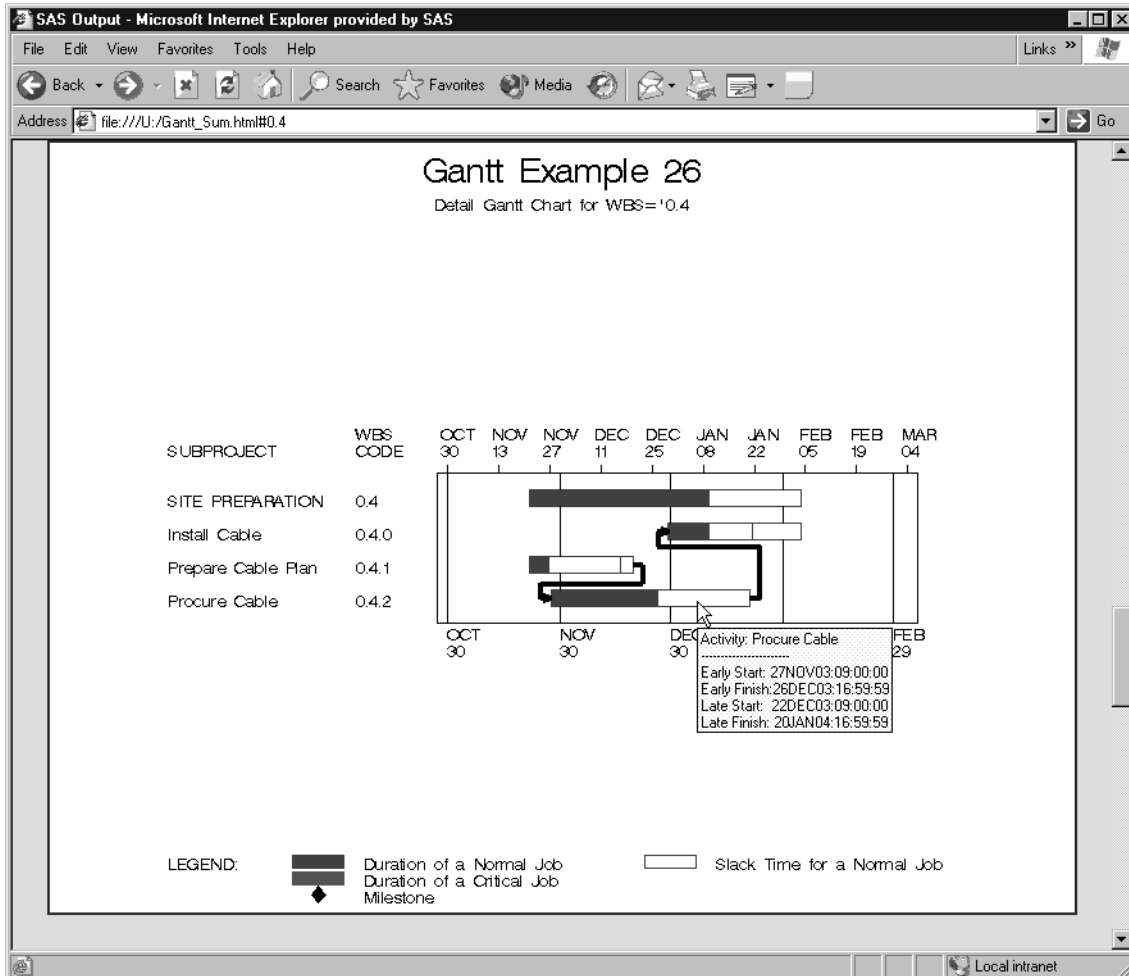
Output 6.26.1. Summary Gantt Chart



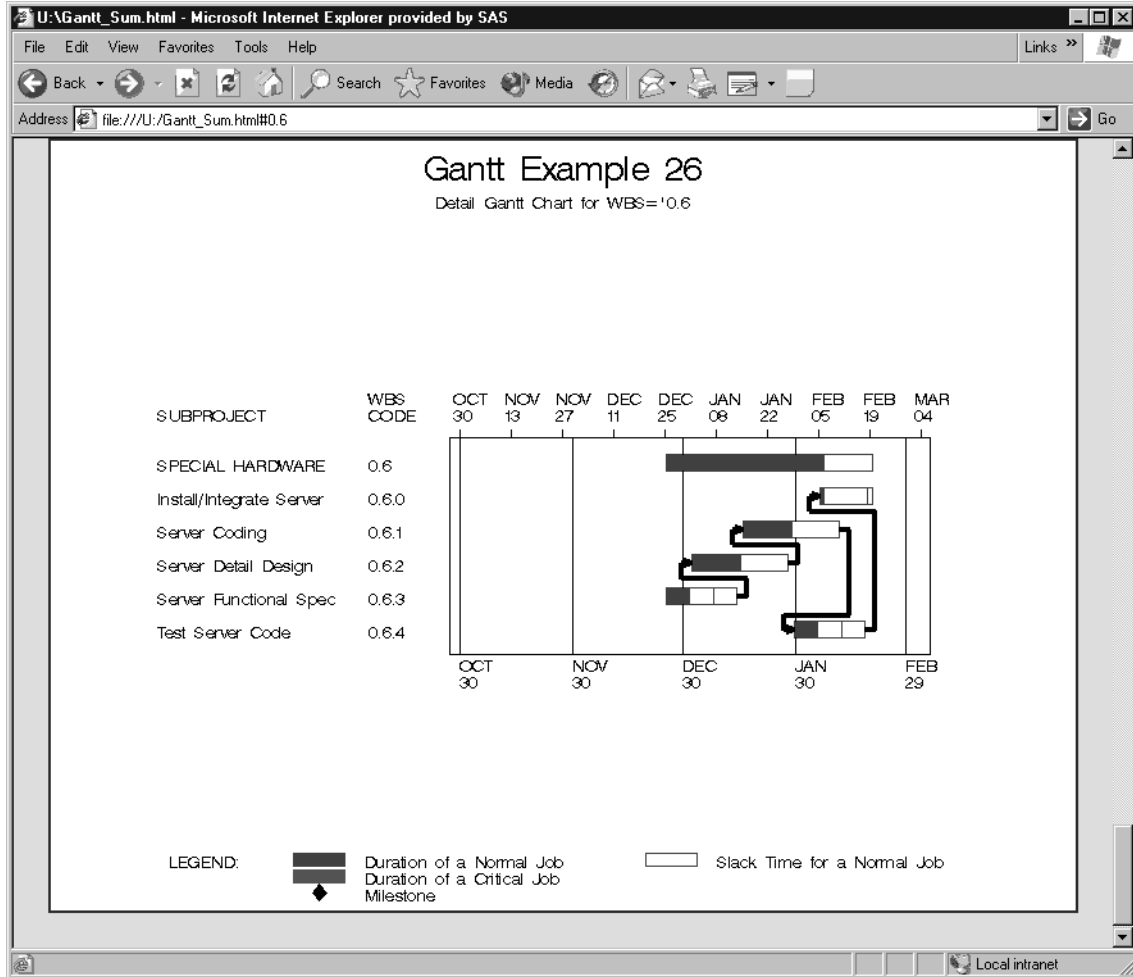
Notice the hand-shaped cursor on the SITE PREPARATION bar, which indicates that this bar is a “hot” link. The alternate text box displays the early and late schedules of the SITE PREPARATION activity. The status bar of the browser also shows that

clicking the SITE PREPARATION bar will take you to the location identified by “Gantt_Sum.html#0.4,” which is shown in [Output 6.26.2](#).

Output 6.26.2. Detail Gantt Chart for SITE PREPARATION



Similarly, the detail Gantt chart that is displayed when you click on the SPECIAL HARDWARE summary bar is shown in [Output 6.26.3](#).

Output 6.26.3. Detail Gantt Chart for SPECIAL HARDWARE**Example 6.27. Using the CHARTWIDTH= Option**

This example illustrates the use of the CHARTWIDTH= option to create Gantt charts that are consistent in appearance. The data set used in this example is the SAVE data set created in [Example 6.6](#).

Gantt charts are first produced using different values of the MINDATE= option, and without specifying the CHARTWIDTH= option. [Output 6.27.1](#) shows a Gantt chart using MINDATE='1jan04', and [Output 6.27.2](#) shows a Gantt chart using MINDATE='1oct03'. Notice that the chart in [Output 6.27.2](#) has a much larger chart area than the chart in [Output 6.27.1](#), and the 'Activity Description' column is compressed and rather difficult to read.

```

title f=swiss 'Gantt Example 27';

* plot the schedule with MINDATE=1jan04;

title2 f=swiss 'MINDATE=1jan04';
proc gantt data=save;
  chart / mindate='1jan04'd maxdate='1feb04'd

```

```

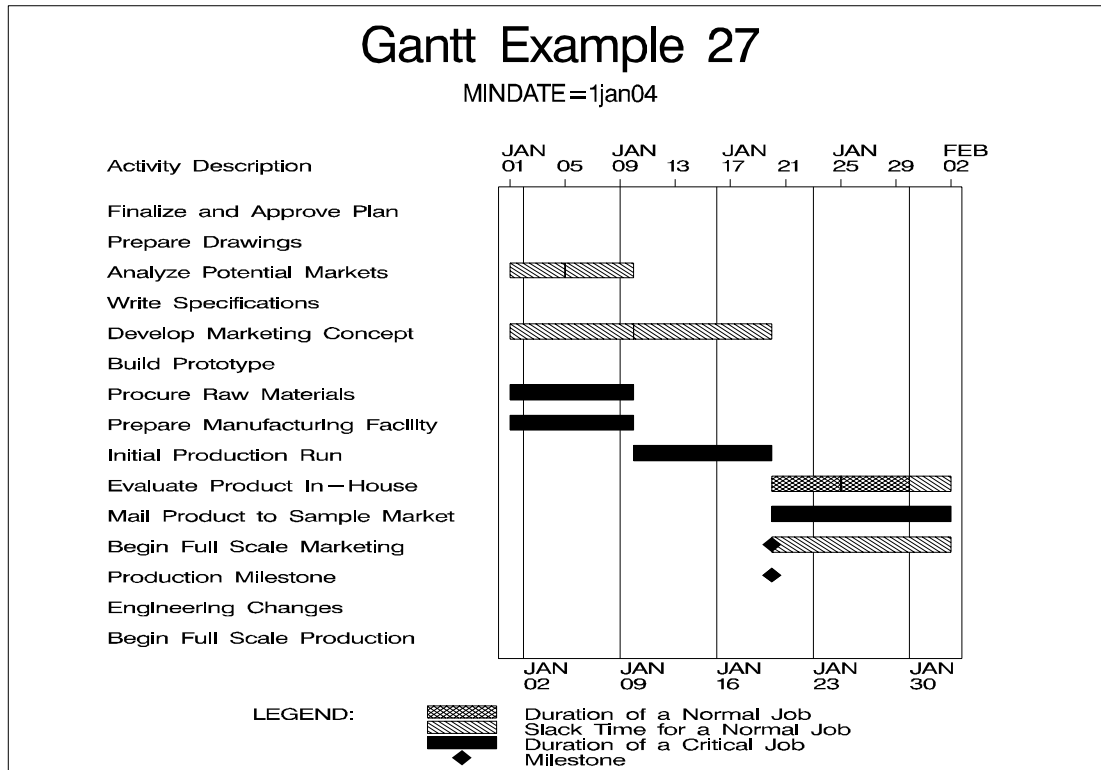
dur=days nojobnum compress fill
ref='2jan04'd to '2feb04'd by week
relabel font=swiss;
id descrpt;
run;

* plot the schedule with MINDATE=1oct03;

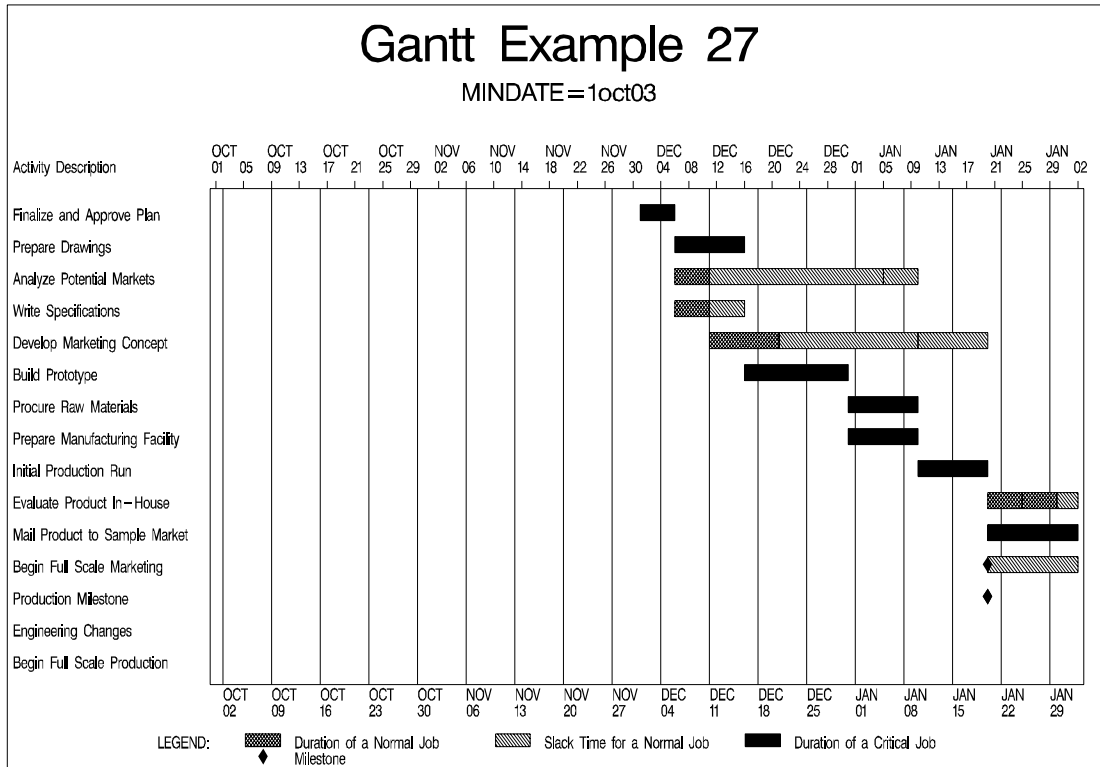
title2 f=swiss 'MINDATE=1oct03';
proc gantt data=save;
  chart / mindate='1oct03'd maxdate='1feb04'd
  dur=days nojobnum compress fill
  ref='2oct03'd to '2feb04'd by week
  relabel font=swiss;
id descrpt;
run;

```

Output 6.27.1. Without the CHARTWIDTH= Option (MINDATE=1Jan04)



Output 6.27.2. Without the CHARTWIDTH= Option (MINDATE=1Oct03)



The same charts are now plotted with the CHARTWIDTH= option. The specification CHARTWIDTH=75 indicates that the chart is rescaled so the axis area is 75% of the chart width and the text area is 25% of the chart width. Therefore, specifying CHARTWIDTH=75 for both charts gives the two charts a consistent appearance. The output is shown in [Output 6.27.3](#) and [Output 6.27.4](#).

```

title f=swiss 'Gantt Example 27';

* plot the schedule with MINDATE=1jan04 and CHARTWIDTH=75;

title2 f=swiss 'MINDATE=1jan04, CHARTWIDTH=75';
proc gantt data=save;
  chart / mindate='1jan04'd maxdate='1feb04'd
    dur=days nojobnum compress fill
    ref='2jan04'd to '2feb04'd by week
    rellabel font=swiss chartwidth=75;
  id descrpt;
run;

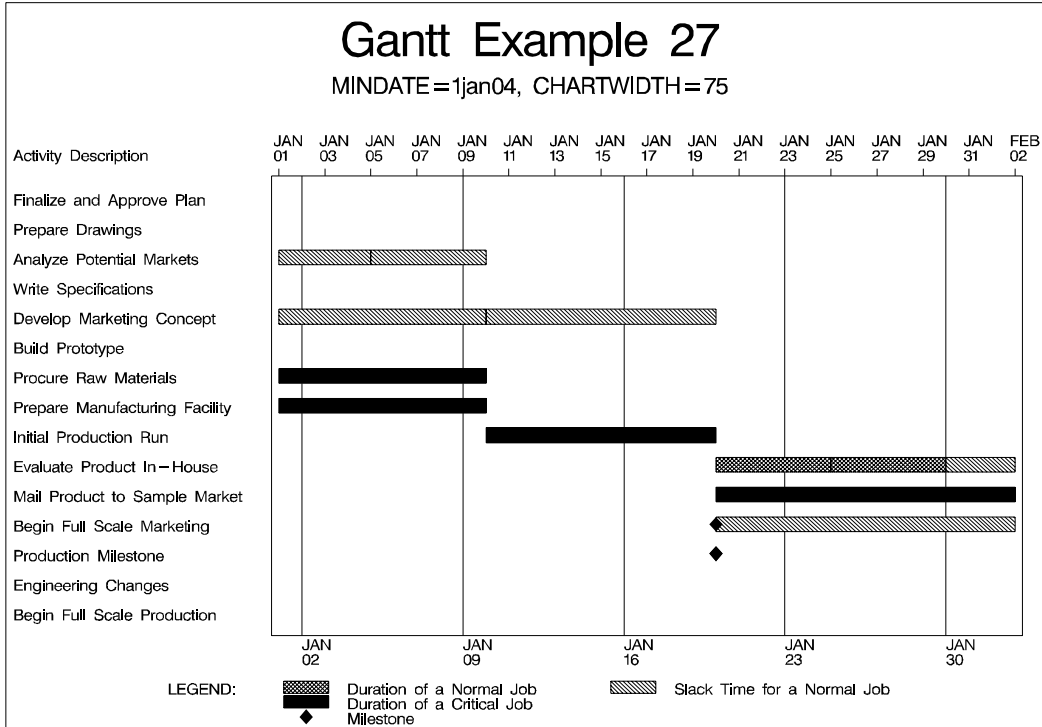
* plot the schedule with MINDATE=1oct03 and CHARTWIDTH=75;

title2 f=swiss 'MINDATE=1oct03, CHARTWIDTH=75';
proc gantt data=save;
  chart / mindate='1oct03'd maxdate='1feb04'd
    dur=days nojobnum compress fill
    ref='2oct03'd to '2feb04'd by week
    rellabel font=swiss chartwidth=75;

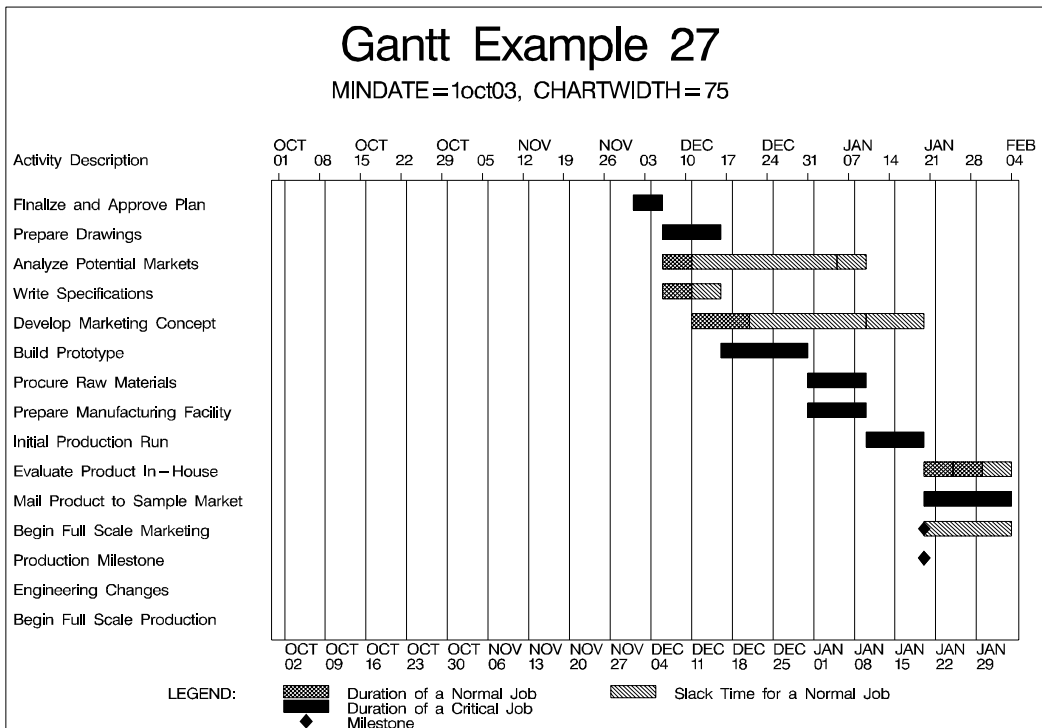
```

```
id descript;
run;
```

Output 6.27.3. Using the CHARTWIDTH= Option (MINDATE=1Jan04)



Output 6.27.4. Using the CHARTWIDTH= Option (MINDATE=1Oct03)



Statement and Option Cross-Reference Tables

The next two tables reference the statements and options in the GANTT procedure that are illustrated by the examples in this section.

Table 6.30. Options Specified in Examples 4.1–4.14

Option	1	2	3	4	5	6	7	8	9	10	11	12	13	14
A_FINISH=										X				
A_START=										X				
BETWEEN=		X												
CALID=									X					
CALENDAR=									X					
CAXIS=				X	X					X				
CFRAME=				X	X		X							
CHART var				X	X									
CMILE=				X	X	X				X				
COMBINE												X		
COMPRESS				X	X		X			X		X		
CREF=							X							
CRITFLAG		X												
CTEXT=				X	X					X				
CTNOW=												X		
DATA=			X				X	X	X	X	X	X	X	X
DUR=				X	X	X	X	X		X	X	X	X	X
FILL		X												
FONT=			X	X	X	X	X			X	X	X	X	X
HCONNECT										X				
HEIGHT=											X			
HOLIDATA=			X					X	X	X	X	X	X	X
HOLIDAY=			X					X	X	X	X	X	X	X
HOLIDUR=								X						
HOLIFIN=			X						X	X	X	X		
HPAGES=			X											
ID		X	X	X	X	X	X	X	X	X	X	X	X	X
INCREMENT=		X												
INTERVAL=								X						
LINEPRINTER	X	X												
L_FINISH=														X
LREF=							X							
L_START=														X
MARKBREAK								X	X					
MAXDATE=							X	X	X					
MINDATE=							X	X	X					
MININTERVAL=						X		X						
NOJOBNUM		X					X							
NOLEGEND		X				X								
PCOMPRESS								X	X		X		X	X
REF=		X				X	X							

Table 6.30. (continued)

Option	1	2	3	4	5	6	7	8	9	10	11	12	13	14
REFLABEL							X							
SCALE=						X					X			
S_FINISH=														X
SKIP=		X												X
S_START=														X
SUMMARY		X												
TIMENOW=											X	X		
WORKDATA=									X					

Table 6.31. Options Specified in Examples 4.15–4.27

Option	15	16	17	18	19	20	21	22	23	24	25	26	27
A_FINISH=				X									
A_START=				X									
ACTIVITY=				X		X			X			X	
ANNOTATE=							X						
BY	X	X											
CAXIS=					X		X		X				
CFRAME=						X							
CHARTWIDTH=													X
CMILE=			X	X	X	X	X						
COMPRESS			X	X	X	X	X			X			X
CPREC=				X	X	X			X				
CREF=						X	X						
CTEXT=									X				
DATA=		X	X	X	X	X	X	X	X	X		X	X
DUR=	X		X	X	X	X	X	X			X	X	X
FONT=	X	X	X	X		X		X	X	X	X	X	X
FILL													X
HEAD=					X								
HEIGHT=			X					X					
HOLIDATA=			X	X	X	X	X						
HOLIDAY=			X	X	X	X	X						
HOLIFIN=				X		X							
HTML=												X	
HTOFF=			X										
ID	X	X	X	X	X	X	X		X	X	X	X	X
INCREMENT=					X		X		X				
INTERVAL=							X						
LABDATA=								X	X	X			
LABSPLIT=								X		X			
LABVAR=								X	X				
LAG=						X							
LEVEL=				X									
LREF=						X	X	X					

Table 6.31. (continued)

Option	15	16	17	18	19	20	21	22	23	24	25	26	27
MAXDATE=	X				X		X		X		X	X	X
MAXDEC=								X					
MAXDISLV=					X								
MINDATE=	X						X		X		X	X	X
MININTERVAL=								X				X	
MININTGV=					X	X							
MINOFFGV=					X				X				
MINOFFLV=					X	X			X				
NOJOBNUM								X	X	X		X	X
NOLEGEND								X		X			
ONEZONEVAL											X		
PCOMPRESS	X	X						X	X		X	X	
PRECDATA=						X							
REF=						X	X	X		X		X	X
REFLABEL						X						X	X
SCALE=	X							X	X	X	X	X	
S_FINISH=										X			
SKIP=								X		X			
SPLIT=											X		
S_START=										X			
SUCCESSOR=				X		X			X			X	
TAIL=					X								
WPREC=						X			X			X	
ZONE=											X		

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- Moder, J. J., Phillips, C. R., and Davis, E. W. (1983), *Project Management with CPM, PERT and Precedence Diagramming*, New York: Van Nostrand Reinhold Company.

Chapter 7

The NETDRAW Procedure

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Chapter 7

The NETDRAW Procedure

Overview

The NETDRAW procedure draws a network diagram of the activities in a project. Boxes (or nodes) are used to represent the activities, and lines (or arcs) are used to show the precedence relationships among the activities. Though the description of the procedure is written using project management terminology, PROC NETDRAW can be used to draw any network such as an organizational chart or a software flow diagram. The only information required by the procedure for drawing such a diagram is the name of each activity in the project (or node in the network) and a list of all its immediate successor activities (or nodes connected to it by arcs). Note that project networks are acyclic. However, the procedure can also be used to draw cyclic networks by specifying explicitly the coordinates for the nodes or by requesting the procedure to break the cycles in an arbitrary fashion.

The [ACTNET](#) statement in the NETDRAW procedure is designed to draw activity networks that represent a project in Activity-On-Node (AON) format. All network information is contained in SAS data sets. The input data sets used by PROC NETDRAW and the output data set produced by the procedure are as follows:

- The [Network](#) input data set contains the precedence information, namely, the activity-successor information for all the nodes in the network. This data set can be an [Activity](#) data set that is used as input to the CPM procedure or a [Schedule](#) data set that is produced by the CPM procedure, or it can even be a [Layout](#) data set produced by the NETDRAW procedure. The minimum amount of information that is required by PROC NETDRAW is the activity-successor information that can be obtained from any one of the preceding three possible types of data sets. The additional information in the input data set can be used by the procedure to add detail to the nodes in the diagram, and, in the case of the Layout data set, the procedure can use the `_X_` and `_Y_` variables to lay out the nodes and arcs of the diagram.
- The [Annotate](#) input data set contains the graphics and text that are to be annotated on the network diagram. This data set is used by the procedure through the Annotate facility in SAS/GRAPH software.
- The [Layout](#) output data set produced by PROC NETDRAW contains all the information about the layout of the network. For each node in the network, the procedure saves the (x, y) coordinates; for each arc between each pair of nodes, the procedure saves the (x, y) coordinates of each turning point of the arc in a separate observation. Using these values, the procedure can draw the network diagram without recomputing node placement and arc routing.

Two issues arise in drawing and displaying a network diagram: the layout of the diagram and the format of the display. The layout of the diagram consists of placing the nodes of the network and routing the arcs of the network in an appropriate manner. The format of the display includes the size of the nodes, the distance between nodes, the color of the nodes and arcs, and the information that is placed within each node. Several options available in the ACTNET statement enable you to control the format of the display and the layout of the diagram; these options and their uses are explained in detail later in this chapter.

Following is a list of some of the key aspects of the procedure:

- The Network input data set specifies the activities (or nodes) in the network and their immediate successors. The amount of information displayed within each node can be controlled by the ID= option and by the use of default variables in the data set.
- The procedure uses the node-successor information to determine the placement of the nodes and the layout of the arcs connecting the nodes.
- By default, PROC NETDRAW uses the topological ordering of the activity network to determine the x coordinates of the nodes. In a time-based network diagram, the nodes can be ordered according to any numeric, SAS date, time, or datetime variable (the ALIGN= variable) in the input data set.
- The network does not have to represent a project. You can use PROC NETDRAW to draw any network. If the network has no cycles, then the procedure bases the node placement and arc routing on the precedence relationships. Alternately, you can specify explicitly the node positions or use the ALIGN= variable, and let the procedure determine the arc routing.
- To draw networks with cycles, use the BREAKCYCLE option. Alternately, you can use the ALIGN= option or specify the node positions so that the procedure needs only to determine the arc routing. See Example 7.12 on page 694 for an illustration of a cyclic network.
- The ZONE= option enables you to divide the network into horizontal bands or zones. This is useful in grouping the activities of the project according to some appropriate classification.
- The TREE option instructs PROC NETDRAW to check if the network is indeed a tree, and, if so, to exploit the tree structure in the node layout. This feature is useful for drawing organizational charts, hierarchical charts, and work breakdown structures.
- PROC NETDRAW gives you the option of displaying the network diagram in one of three modes: graphics, line-printer, or full-screen. The default mode is graphics mode, which enables you to produce charts of high resolution quality. Graphics mode requires SAS/GRAPH software. See the “Graphics Options” section on page 633 for more information on producing high-resolution quality network diagrams. You can also produce line-printer quality network diagrams by specifying the LINEPRINTER (LP) option in the PROC NETDRAW statement. In addition to sending the output to either a plotter or printer, you can view the network diagram at the terminal in full-screen mode by specifying

the **FULLSCREEN (FS)** option in the PROC NETDRAW statement. See the “Full-Screen Options” section on page 632 for more information on viewing network diagrams in full-screen mode.

- The full-screen version of the procedure enables you to move the nodes around on the screen (subject to maintaining the precedence order of the activities) and thus change the layout of the network diagram.
- The graphics version of the procedure enables you to annotate the network diagram using the **Annotate** facility in SAS/GRAPH software.
- The positions of the nodes and arcs of the layout determined by PROC NETDRAW are saved in an output data set called the **Layout** data set. This data set can be used again as input to PROC NETDRAW; using such a data set saves some processing time because the procedure does not need to determine the node and arc placement.
- If necessary, the procedure draws the network across page boundaries. The number of pages that are used depends on the number of print positions that are available in the horizontal and vertical directions.
- In graphics mode, the **COMPRESS** and **PCOMPRESS** options enable you to produce the network on one page. You can also control the number of pages used to create the network diagram with the **HPAGES=** and **VPAGES=** options.
- In graphics mode, the **ROTATE** and **ROTATETEXT** options enable you to produce a top-down tree diagram.

Getting Started

The first step in defining a project is to make a list of the activities in the project and determine the precedence constraints that need to be satisfied by these activities. It is useful at this stage to view a graphical representation of the project network. In order to draw the network, you specify the nodes of the network and the precedence relationships among them. Consider the software development project that is described in the “Getting Started” section of [Chapter 2, “The CPM Procedure.”](#) The network data are in the SAS data set **SOFTWARE**, displayed in [Figure 7.1](#).

Software Project Data Set SOFTWARE					
Obs	descript	duration	activity	sucesr1	sucesr2
1	Initial Testing	20	TESTING	RECODE	
2	Prel. Documentation	15	PRELDOC	DOCEDREV	QATEST
3	Meet Marketing	1	MEETMKT	RECODE	
4	Recoding	5	RECODE	DOCEDREV	QATEST
5	QA Test Approve	10	QATEST	PROD	
6	Doc. Edit and Revise	10	DOCEDREV	PROD	
7	Production	1	PROD		

Figure 7.1. Software Project

The following code produces the network diagram shown in [Figure 7.2](#):

```

pattern1 v=e c=green;
title f=swiss 'Software Project';
proc netdraw graphics data=software;
  actnet / act=activity
        succ=(succesr1 succesr2)
        pcompress separatearcs
        font=swiss;
run;

```

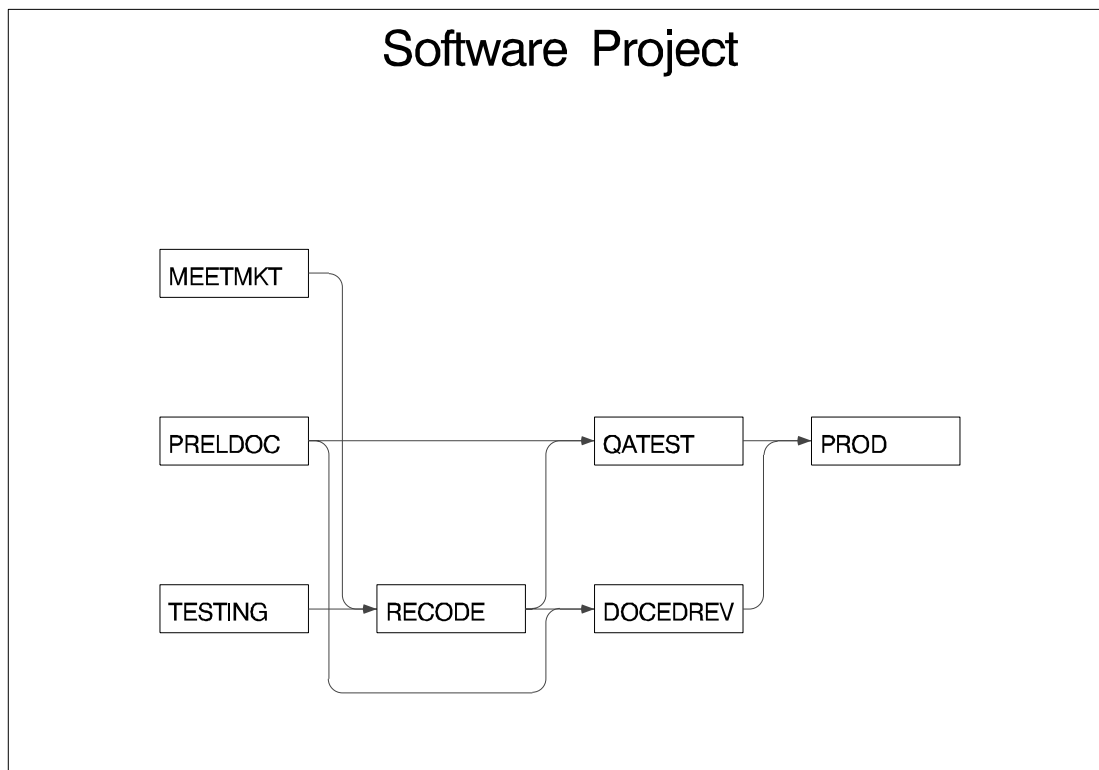


Figure 7.2. Software Project

The procedure determines the placement of the nodes and the routing of the arcs on the basis of the topological ordering of the nodes and attempts to produce a compact diagram. You can control the placement of the nodes by specifying explicitly the node positions. The data set `SOFTNET`, shown in [Figure 7.3](#), includes the variables `_X_` and `_Y_`, which specify the desired node coordinates. Note that the precedence information is conveyed using a single `SUCCESSOR` variable unlike the data set `SOFTWARE`, which contains two `SUCCESSOR` variables.

Software Project Data Set SOFTNET						
Obs	descript	duration	activity	successor	_x_	_y_
1	Initial Testing	20	TESTING	RECODE	1	1
2	Meet Marketing	1	MEETMKT	RECODE	1	2
3	Prel. Documentation	15	PRELDOC	DOCEDREV	1	3
4	Prel. Documentation	15	PRELDOC	QATEST	1	3
5	Recoding	5	RECODE	DOCEDREV	2	2
6	Recoding	5	RECODE	QATEST	2	2
7	QA Test Approve	10	QATEST	PROD	3	3
8	Doc. Edit and Revise	10	DOCEDREV	PROD	3	1
9	Production	1	PROD		4	2

Figure 7.3. Software Project: Specify Node Positions

The following code produces a network diagram (shown in [Figure 7.4](#)) with the new node placement:

```

title2 h=1.5 f=swiss 'Controlled Layout';
proc netdraw graphics data=softnet;
  actnet / act=activity
          succ=(successor)
          pcompress
          font=swiss;
run;

```

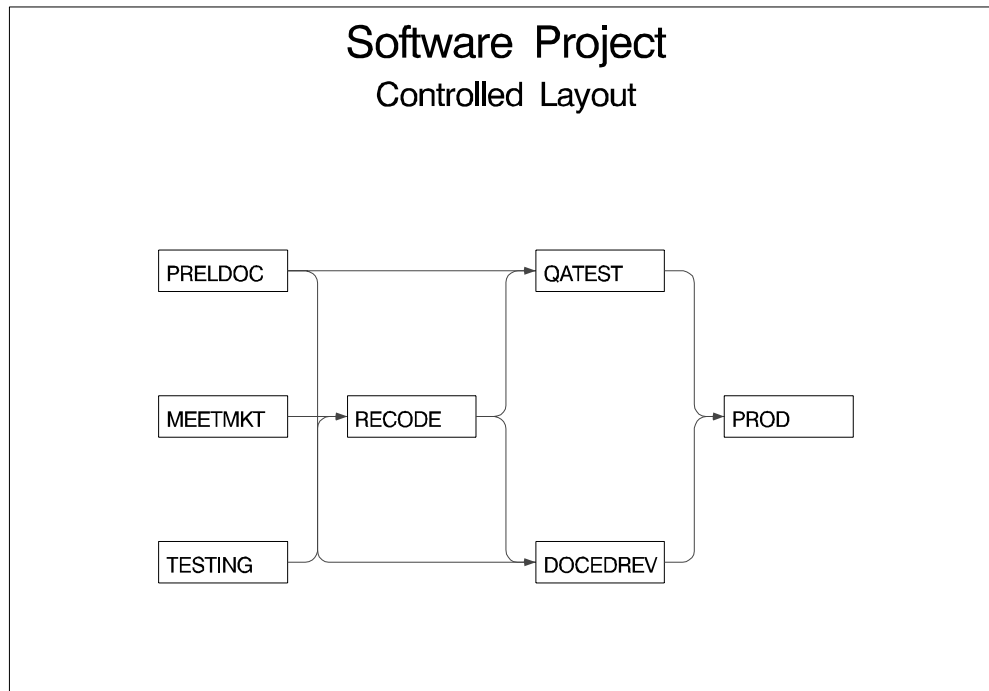


Figure 7.4. Software Project: Controlled Layout

Software Project Project Schedule					
descript	activity	succesr1	succesr2	duration	E_START
Initial Testing	TESTING	RECODE		20	01MAR04
Prel. Documentation	PRELDOC	DOCEDREV	QATEST	15	01MAR04
Meet Marketing	MEETMKT	RECODE		1	01MAR04
Recoding	RECODE	DOCEDREV	QATEST	5	21MAR04
QA Test Approve	QATEST	PROD		10	26MAR04
Doc. Edit and Revise	DOCEDREV	PROD		10	26MAR04
Production	PROD			1	05APR04
descript	E_FINISH	L_START	L_FINISH	T_FLOAT	F_FLOAT
Initial Testing	20MAR04	01MAR04	20MAR04	0	0
Prel. Documentation	15MAR04	11MAR04	25MAR04	10	10
Meet Marketing	01MAR04	20MAR04	20MAR04	19	19
Recoding	25MAR04	21MAR04	25MAR04	0	0
QA Test Approve	04APR04	26MAR04	04APR04	0	0
Doc. Edit and Revise	04APR04	26MAR04	04APR04	0	0
Production	05APR04	05APR04	05APR04	0	0

Figure 7.5. Software Project Schedule

While the project is in progress, you may want to use the network diagram to show the current status of each activity as well as any other relevant information about each activity. PROC NETDRAW can also be used to produce a time-scaled network diagram using the schedule produced by PROC CPM. The schedule data for the software project described earlier are saved in a data set, INTRO1, which is shown in [Figure 7.5](#).

To produce a time-scaled network diagram, use the TIMESCALE option in the ACTNET statement, as shown in the following program. The MININTERVAL= and the LINEAR options are used to control the time axis on the diagram. The ID=, NOLABEL, and NODEFID options control the amount of information displayed within each node. The resulting diagram is shown in [Figure 7.6](#).

```

title2 h=1.5 f=swiss 'Time-Scaled Diagram';
proc netdraw graphics data=intro1;
  actnet / act=activity succ=(succ:)
          separatearcs pcompress font=swiss htext=2
          timescale linear frame mininterval=week
          id=(activity duration) nolabel nodefid;
run;

```

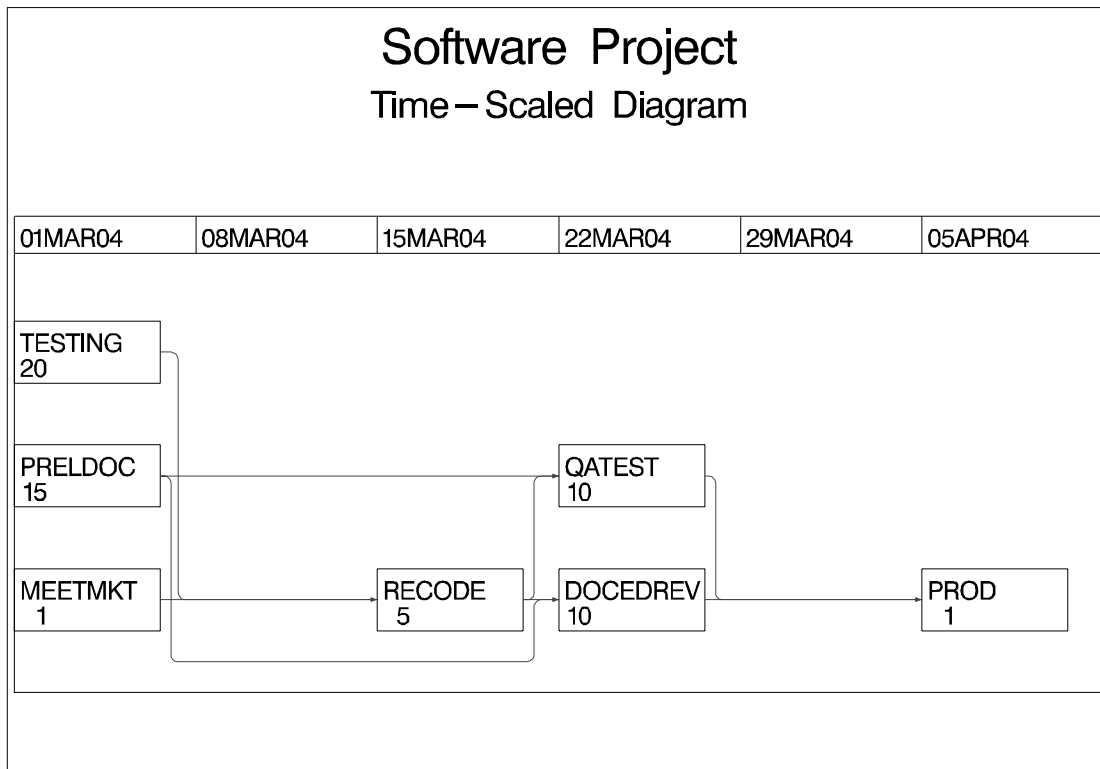


Figure 7.6. Software Project: Time-Scaled Network Diagram

Several other options are available to control the layout of the nodes, the appearance of the network, and the format of the time axis. For projects that have natural divisions, you can use the `ZONE=` option to divide the network into horizontal zones or bands. For networks that have an embedded tree structure, you can use the `TREE` option to draw the network like a tree laid out from left to right, with the root at the left edge of the diagram; in graphics mode, you can obtain a top-down tree with the root at the top of the diagram. For cyclic networks you can use the `BREAKCYCLE` option to enable the procedure to break cycles. All of these options are discussed in detail in the following sections.

Syntax

The following statements are used in PROC NETDRAW:

```
PROC NETDRAW options ;
ACTNET / options ;
```

Functional Summary

The following tables outline the options available for the NETDRAW procedure classified by function.

Table 7.1. Color Options

Description	Statement	Option
color of arcs	ACTNET	CARCS=
color of time axis	ACTNET	CAXIS=
fill color for critical nodes	ACTNET	CCNODEFILL=
color of critical arcs	ACTNET	CCRITARCS=
color of outline of critical nodes	ACTNET	CCRITOUT=
fill color for nodes	ACTNET	CNODEFILL=
color of outline of nodes	ACTNET	COUTLINE=
color of reference lines	ACTNET	CREF=
color of reference break lines	ACTNET	CREFBRK=
color of text	ACTNET	CTEXT=

Table 7.2. Data Set Specifications

Description	Statement	Option
Annotate data set	ACTNET	ANNOTATE=
Annotate data set	NETDRAW	ANNOTATE=
Activity data set	NETDRAW	DATA=
Network output data set	NETDRAW	OUT=

Table 7.3. Format Control Options

Description	Statement	Option
height of node in character cells	ACTNET	BOXHT=
width of node in character cells	ACTNET	BOXWIDTH=
duration <i>variable</i>	ACTNET	DURATION=
ID <i>variables</i>	ACTNET	ID=
suppress default ID variables	ACTNET	NODEFID
suppress ID variable labels	ACTNET	NOLABEL
upper limit on number of pages	ACTNET	PAGES=
indicate completed or in-progress activities	ACTNET	SHOWSTATUS
horizontal distance between nodes	ACTNET	XBETWEEN=
vertical distance between nodes	ACTNET	YBETWEEN=

Table 7.4. Full-Screen Options

Description	Statement	Option
reference break line character	ACTNET	BRKCHAR=
characters for node outlines and connections	ACTNET	FORMCHAR=
reference character	ACTNET	REFCHAR=

Table 7.5. Graphics Catalog Options

Description	Statement	Option
description for catalog entry	ACTNET	DESCRIPTION=
name for catalog entry	ACTNET	NAME=
name of graphics catalog	NETDRAW	GOUT=

Table 7.6. Graphics Display Options

Description	Statement	Option
length of arrowhead in character cells	ACTNET	ARROWHEAD=
center each ID variable within node	ACTNET	CENTERID
compress the diagram to a single page	ACTNET	COMPRESS
text font	ACTNET	FONT=
text height	ACTNET	HEIGHT=
horizontal margin in character cells	ACTNET	HMARGIN=
number of horizontal pages	ACTNET	HPAGES=
reference line style	ACTNET	LREF=
reference break line style	ACTNET	LREFBRK=
width of lines used for critical arcs	ACTNET	LWCRT=
width of lines	ACTNET	LWIDTH=
width of outline for nodes	ACTNET	LWOUTLINE=
suppress filling of arrowheads	ACTNET	NOARROWFILL
suppress page number	ACTNET	NOPAGENUMBER
suppress vertical centering	ACTNET	NOVCENTER
number of nodes in horizontal direction	ACTNET	NXNODES=
number of nodes in vertical direction	ACTNET	NYNODES=
display page number at upper right corner	ACTNET	PAGENUMBER
pattern <i>variable</i>	ACTNET	PATTERN=
proportionally compress the diagram	ACTNET	PCOMPRESS
draw arcs with rectangular corners	ACTNET	RECTILINEAR
reverse the order of the <i>y</i> pages	ACTNET	REVERSEY
rotate the network diagram	ACTNET	ROTATE
rotate text within node by 90 degrees	ACTNET	ROTATETEXT
separate arcs along distinct tracks	ACTNET	SEPARATEARCS
vertical margin in character cells	ACTNET	VMARGIN=
number of vertical pages	ACTNET	VPAGES=

Table 7.7. Layout Options

Description	Statement	Option
break cycles in cyclic networks	ACTNET	BREAKCYCLE
use dynamic programming algorithm to route arcs	ACTNET	DP
number of horizontal tracks between nodes	ACTNET	HTRACKS=
route arc along potential node positions	ACTNET	NODETRACK
do not use dynamic programming algorithm to route arcs	ACTNET	NONDP
block track along potential node positions	ACTNET	NONODETRACK
restrict scope of arc layout algorithm	ACTNET	RESTRICTSEARCH
use spanning tree layout	ACTNET	SPANNINGTREE
draw network as a tree, if possible	ACTNET	TREE
number of vertical tracks between nodes	ACTNET	VTRACKS=

Table 7.8. Line-Printer Options

Description	Statement	Option
reference break line character	ACTNET	BRKCHAR=
characters for node outlines and connections	ACTNET	FORMCHAR=
reference character	ACTNET	REFCHAR=

Table 7.9. Mode Options

Description	Statement	Option
invoke full-screen version	NETDRAW	FULLSCREEN
invoke graphics version	NETDRAW	GRAPHICS
invoke line-printer version	NETDRAW	LINEPRINTER
suppress display of diagram	NETDRAW	NODISPLAY

Table 7.10. Network Specifications

Description	Statement	Option
activity <i>variable</i>	ACTNET	ACTIVITY=
lag <i>variables</i>	ACTNET	LAG=
successor <i>variables</i>	ACTNET	SUCCESSOR=

Table 7.11. Time-Scale Options

Description	Statement	Option
align <i>variable</i>	ACTNET	ALIGN=
draw reference lines at every level	ACTNET	AUTOREF
frame network diagram and axis	ACTNET	FRAME
draw all vertical levels	ACTNET	LINEAR
maximum number of empty columns between tick marks	ACTNET	MAXNULLCOLUMN=
smallest interval per level	ACTNET	MININTERVAL=
number of levels per tick mark	ACTNET	NLEVELSPERCOLUMN=
suppress time axis on continuation pages	ACTNET	NOREPEATAXIS
omit the time axis	ACTNET	NOTIMEAXIS
stop procedure if align value is missing	ACTNET	QUITMISSINGALIGN
draw zigzag reference line at breaks	ACTNET	REFBREAK
show all breaks in time axis	ACTNET	SHOWBREAK
draw time-scaled diagram	ACTNET	TIMESCALE
use format of variable and not default	ACTNET	USEFORMAT

Table 7.12. Tree Options

Description	Statement	Option
center each node with respect to subtree	ACTNET	CENTERSUBTREE
order of the children of each node	ACTNET	CHILDORDER=
separate sons of a node for symmetry	ACTNET	SEPARATESONS
use spanning tree layout	ACTNET	SPANNINGTREE
draw network as a tree, if possible	ACTNET	TREE

Table 7.13. Web Options

Description	Statement	Option
image map output data set	NETDRAW	IMAGEMAP=
web reference variable	ACTNET	WEB=

Table 7.14. Zone Options

Description	Statement	Option
divide network into connected components	ACTNET	AUTOZONE
suppress zone labels	ACTNET	NOZONELABEL
zone <i>variable</i>	ACTNET	ZONE=
label zones	ACTNET	ZONELABEL
set missing pattern values using zone	ACTNET	ZONEPAT
leave extra space between zones	ACTNET	ZONESPACE

PROC NETDRAW Statement

PROC NETDRAW *options* ;

The following options can appear in the PROC NETDRAW statement.

ANNOTATE=SAS-data-set

specifies the input data set that contains the appropriate annotate variables for the purpose of adding text and graphics to the network diagram. The data set specified must be an Annotate data set. See the “Using the Annotate Facility” section on page 657 for further details about this option.

DATA=SAS-data-set

names the SAS data set to be used by PROC NETDRAW for producing a network diagram. If DATA= is omitted, the most recently created SAS data set is used. This data set, also referred to as the Network data set, contains the network information (ACTIVITY and SUCCESSOR variables) and any ID variables that are to be displayed within the nodes. For details about this data set, see the “Network Input Data Set” section on page 640.

FULLSCREEN

FS

indicates that the network be drawn in full-screen mode. This enables you to view the network diagram produced by NETDRAW in different scales; you can also move nodes around the diagram to modify the layout.

GOUT=graphics-catalog

specifies the name of the graphics catalog used to save the output produced by PROC NETDRAW for later replay. This option is valid only if the GRAPHICS option is specified.

GRAPHICS

indicates that the network diagram produced be of high-resolution quality. If you specify the GRAPHICS option, but you do not have SAS/GRAPH software licensed at your site, the procedure stops and issues an error message. GRAPHICS is the default mode.

IMAGEMAP=SAS-data-set

names the SAS data set that receives a description of the areas of a graph and a link for each area. This information is for the construction of HTML image maps. You use a SAS DATA step to process the output file and generate your own HTML files. The graph areas correspond to the link information that comes from the WEB variable in the Network data set. This gives you complete control over the appearance and structure of your HTML pages.

LINEPRINTER**LP**

produces a network diagram of line-printer quality.

NODISPLAY

requests the procedure not to display any output. The procedure still produces the [Layout](#) data set containing the details about the network layout. This option is useful to determine node placement and arc routing for a network that can be used at a later time to display the diagram.

OUT=SAS-data-set

specifies a name for the output data set produced by PROC NETDRAW. This data set, also referred to as the [Layout](#) data set, contains the node and arc placement information determined by PROC NETDRAW to draw the network. This data set contains all the information that was specified in the [Network](#) data set to define the project; in addition, it contains variables that specify the coordinates for the nodes and arcs of the network diagram. For details about the Layout data set, see the “[Layout Data Set](#)” section on page 647.

If the OUT= option is omitted, the procedure creates a data set and names it according to the DATA*n* convention.

ACTNET Statement

ACTNET / options ;

The ACTNET statement draws the network diagram. You can specify several options in this statement to control the appearance of the network. All these options are described in the current section under appropriate headings: first, all options that are valid for all modes of the procedure are listed, followed by the options classified according to the mode (full-screen, graphics, or line-printer) of invocation of the procedure.

General Options

ACTIVITY=variable

specifies the variable in the [Network](#) data set that names the nodes in the network. If the data set contains a variable called `_FROM_`, this specification is ignored; otherwise, this option is required.

ALIGN=variable

specifies the variable in the **Network** data set containing the time values to be used for positioning each activity. This option triggers the **TIMESCALE** option that adds a time axis at the top of the network and aligns the nodes of the network according to the values of the **ALIGN=** variable. The minimum and maximum values of this variable are used to determine the time axis. The format of this variable is used to determine the default value of the **MININTERVAL=** option, which, in turn, determines the format of the time axis.

AUTOREF

draws reference lines at every tick mark. This option is valid only for time-scaled network diagrams.

AUTOZONE

enables automatic zoning (or dividing) of the network into connected components. This option is equivalent to defining an automatic zone variable that associates a tree number for each node. The tree number refers to a number assigned (by the procedure) to each distinct tree of a spanning tree of the network.

BREAKCYCLE

breaks cycles by reversing the back arcs of the network. The back arcs are determined by constructing an underlying spanning tree of the network. Once cycles are broken, the nodes of the network are laid out using a topological ordering of the new network formed from the original network by ignoring the back arcs. The back arcs are drawn after determining the network layout. Note that only the back arcs go from right to left.

BOXHT=boxht

specifies the height of the box (in character cell positions) used for denoting a node. If this option is not specified, the height of the box equals the number of lines required for displaying all of the ID variable values for any of the nodes. See the **ROTATETEXT** option (under “Graphics Options”) for an exception.

BOXWIDTH=boxwidth

specifies the width of the box (in character cell positions) used for denoting a node. If this option is not specified, the width of the box equals the maximum number of columns required for displaying all of the ID variable values for any of the nodes. See the **ROTATETEXT** option (under “Graphics Options”) for an exception.

CENTERSUBTREE

positions each node at the center of the subtree that originates from that node instead of placing it at the midpoint of its children (which is the default behavior). Note that the nodes are placed at integral positions along an imaginary grid, so the positioning may not be exactly at the center. This option is valid only in conjunction with the **TREE** option.

CHILDORDER=order

orders the children of each node when the network is laid out using either the **TREE** or the **SPANNINGTREE** option. The valid values for this option are **TOPDOWN** and **BOTTOMUP** for default orientation, and **LEFTRGHT** and **RGHTLEFT** for rotated networks (drawn with the **ROTATETEXT** option). The default is **TOPDOWN**.

DP

causes PROC NETDRAW to use a dynamic programming (DP) algorithm to route the arcs. This DP algorithm is memory and CPU-intensive and is not necessary for most applications.

DURATION=variable

specifies a variable that contains the duration of each activity in the network. This value is used only for displaying the durations of each activity within the node.

FRAME

encloses the drawing area with a border. This option is valid only for time-scaled or zoned network diagrams.

HTRACKS=integer

controls the number of arcs that are drawn horizontally through the space between two adjacent nodes. This option enables you to control the arc-routing algorithm. The default value is based on the maximum number of successors of any node.

ID=(variables)

specifies the variables in the [Network](#) data set that are displayed within each node. In addition to the ID variables, the procedure displays the [ACTIVITY](#) variable, the [DURATION](#) variable (if the DURATION= option was specified), and any of the following variables in the [Network](#) data set: E_START, E_FINISH, L_START, L_FINISH, S_START, S_FINISH, A_START, A_FINISH, T_FLOAT, and F_FLOAT. See [Chapter 2, “The CPM Procedure,”](#) for a description of these variables. If you specify the NODEFID option, only the variables listed in the ID= option are displayed.

LAG=variable**LAG=(variables)**

specifies the variables in the [Network](#) data set that identify the lag types of the precedence relationships between an activity and its successors. Each [SUCCESSOR](#) variable is matched with the corresponding LAG variable; that is, for a given observation, the *i*th LAG variable defines the relationship between the activities specified by the [ACTIVITY](#) variable and the *i*th [SUCCESSOR](#) variable. The LAG variables must be character type, and their values are expected to be specified as one of FS, SS, SF, or FF, which denote ‘Finish-to-Start’, ‘Start-to-Start’, ‘Start-to-Finish’, and ‘Finish-to-Finish’, respectively. You can also use the *keyword_duration_calendar* specification used by the CPM procedure, although PROC NETDRAW uses only the *keyword* information and ignores the lag *duration* and the lag *calendar*. If no LAG variables exist or if an unrecognized value is specified for a LAG variable, PROC NETDRAW interprets the lag as a ‘Finish-to-Start’ type.

This option enables the procedure to identify the different types of nonstandard precedence constraints (Start-to-Start, Start-to-Finish, and Finish-to-Finish) on graphics quality network diagrams by drawing the arcs from and to the appropriate edges of the nodes.

LINEAR

plots one column for every *mininterval* between the minimum and maximum values of the **ALIGN=** variable. By default, only those columns that contain at least one activity are displayed. This option is valid only for time-scaled network diagrams.

MAXNULLCOLUMN=*maxncol*

MAXEMPTY=*maxncol*

MAXZCOL=*maxncol*

MAXNCOL=*maxncol*

specifies the maximum number of empty columns between two consecutive nonempty columns. The default value for this option is 0. Note that specifying the **LINEAR** option is equivalent to specifying the **MAXNULLCOLUMN=** option to be infinity. This option is valid only for time-scaled network diagrams.

MININTERVAL=*mininterval*

specifies the smallest interval to be used per column of the network diagram. Thus, if **MININTERVAL=DAY**, each column is used to represent a day, and all activities that start on the same day are placed in the same column. The valid values for *mininterval* are SECOND, MINUTE, HOUR, DAY, WEEK, MONTH, QTR, and YEAR. The default value of *mininterval* is determined by the format of the **ALIGN=** variable. The tick labels are formatted on the basis of *mininterval*; for example, if *mininterval* is DAY, the dates are marked using the DATE7. format, and if *mininterval* is HOUR, the labels are formatted as TIME5. and so on. This option is valid only for time-scaled network diagrams.

NLEVELSPERCOLUMN=*npercol*

NPERCOL=*npercol*

contracts the time axis by specifying that activities that differ in **ALIGN=** value by less than *npercol* units of **MININTERVAL** can be plotted in the same column. The default value of *npercol* is 1. This option is valid only for time-scaled network diagrams.

NODEFID

indicates that the procedure need not check for any of the default ID variables in the **Network** data set; if this option is in effect, only the variables specified in the **ID=** option are displayed within each node.

NODETRACK

specifies that the arcs can be routed along potential node positions if there is a clear horizontal track to the left of the successor (or **_TO_**) node. This is the default option. To prevent the use of potential node positions, use the **NONODETRACK** option.

NOLABEL

suppresses the labels. By default, the procedure uses the first three letters of the variable name to label all the variables that are displayed within each node of the network. The only exception is the variable that is identified by the **ACTIVITY=** option.

NONDP

uses a simple heuristic to connect the nodes. The default mode of routing is NONDP, unless the **HTRACKS=** or **VTRACKS=** option (or both) are specified and set to a number that is less than the maximum number of successors. The NONDP option is faster than the **DP** option.

NONODETRACK

blocks the horizontal track along potential node positions. This option may lead to more turns in some of the arcs. The default is **NODETRACK**.

NOREPEATAXIS

displays the time axis only on the top of the chart and not on every page. This option is useful if the different pages are to be glued together to form a complete diagram. This option is valid only for time-scaled network diagrams.

NOTIMEAXIS

suppresses the display of the time axis and its labels. Note that the nodes are still placed according to the time scale, but no axis is drawn. This option is valid only for time-scaled network diagrams.

NOZONELABEL**NOZONEDESCR**

omits the zone labeling and the dividing lines. The network is still divided into zones based on the **ZONE** variable, but there is no demarcation or labeling corresponding to the zones.

PAGES=*n*pages

specifies the maximum number of pages to be used for the network diagram in graphics and line-printer modes. The default value is 100.

QUITMISSINGALIGN

stops processing if the **ALIGN=** variable has any missing values. By default, the procedure tries to fill in missing values using the topological order of the network. This option is valid only for time-scaled network diagrams.

REFBREAK

shows breaks in the time axis by drawing a zigzag line down the diagram just before the tick mark at the break. This option is valid only for time-scaled network diagrams.

RESTRICTSEARCH**RSEARCH**

restricts the scope of the arc layout algorithm by restricting the area of search for the arc layout when the **DP** option is in effect; this is useful in reducing the computational complexity of the dynamic programming algorithm. By default, using the **DP** algorithm to route the arcs, the *y* coordinates of the arcs can range through the entire height of the network. The **RESTRICTSEARCH** option limits the *y* coordinates to the minimum and the maximum of the *y* coordinates of the node and its immediate successors.

SEPARATESONS

separates the children (immediate successors) of a given node by adding an extra space in the center whenever it is needed to enable the node to be positioned at integral (x, y) coordinates. For example, if a node has two children, placing the parent node at the midpoint between the two children requires the y coordinate to be noninteger, which is not allowed in the **Layout** data set. By default, the procedure positions the node at the same y level as one of its children. The SEPARATESONS option separates the two children by adding a dummy child in between, thus enabling the parent node to be centered with respect to its children. This option is valid only in conjunction with the **TREE** option.

SHOWBREAK

shows breaks in the time axis by drawing a jagged break in the time axis line just before the tick mark corresponding to the break. This option is valid only for time-scaled network diagrams.

SHOWSTATUS

uses the variable STATUS (if it exists) in the Network data set to determine if an activity is in-progress or completed. Note that the STATUS variable exists in the Schedule data set produced by PROC CPM when used with an ACTUAL statement. If there is no STATUS variable or if the value is missing, the procedure uses the A_FINISH and A_START values to determine the status of the activity. If the network is drawn in line-printer or full-screen mode, activities in progress are outlined with the letter *P* and completed activities are outlined with the letter *F*; in high-resolution graphics mode, in-progress activities are marked with a diagonal line across the node from the bottom left to the top right corner, while completed activities are marked with two diagonal lines.

SPANNINGTREE

uses a spanning tree to place the nodes in the network. This method typically results in a wider layout than the default. However, for networks that have totally disjoint pieces, this option separates the network into connected components (or disjoint trees). This option is not valid for time-scaled or zoned network diagrams, because the node placement dictated by the spanning tree may not be consistent with the zone or the tickmark corresponding to the node.

SUCCESSOR=(variables)

specifies the variables in the **Network** data set that name all the immediate successors of the node specified by the **ACTIVITY** variable. This specification is ignored if the data set contains a variable named **_TO_**. At least one SUCCESSOR variable must be specified if the data set does not contain a variable called **_TO_**.

TIMESCALE

indicates that the network is to be drawn using a time axis for placing the nodes. This option can be used to align the network according to default variables. If the TIMESCALE option is specified without the **ALIGN=** option, the procedure looks for default variables in the following order: **E_START**, **L_START**, **S_START**, and **A_START**. The first of these variables that is found is used as the **ALIGN=** variable.

TREE**TREELAYOUT**

requests the procedure to draw the network as a tree if the network is indeed a tree (that is, all the nodes have at most one immediate predecessor). The option is ignored if the network does not have a tree structure.

USEFORMAT

indicates that the explicit format of the **ALIGN=** variable is to be used instead of the default format based on the **MININTERVAL=** option. Thus, for example, if the **ALIGN** variable contains SAS date values, by default, the procedure uses the **DATE7.** format for the time axis labels irrespective of the format of the **ALIGN=** variable. The **USEFORMAT** option specifies that the variable's format should be used for the labels instead of the default format. This option is valid only for time-scaled network diagrams.

VTRACKS=integer

controls the number of arcs that are drawn vertically through the space between two adjacent nodes. A default value is based on the maximum number of successors of any node.

XBETWEEN=integer**HBETWEEN=integer**

specifies the horizontal distance (in character cell positions) between two adjacent nodes. The value for this option must be at least 3; the default value is 5.

YBETWEEN=integer**VBETWEEN=integer**

specifies the vertical distance (in character cell positions) between two adjacent nodes. The value for this option must be at least 3; the default value is 5.

ZONE=variable

names the variable in the **Network** data set used to separate the network diagram into zones.

ZONELABEL**ZONEDESCR**

labels the different zones and draws dividing lines between two consecutive zones. This is the default behavior; to omit the labels and the dividing lines, use the **NOZONELABEL** option.

ZONESPACE**ZONELEVADD**

draws the network with an extra row between two consecutive zones.

Full-Screen Options**BRKCHAR=brkchar**

specifies the character used for drawing the zigzag break lines down the chart at break points of the time axis. The default value is **>**. This option is valid only for time-scaled network diagrams.

CARCS=*color*

specifies the color of the connecting lines (or arcs) between the nodes. The default value of this option is CYAN.

CAXIS=*color*

specifies the color of the time axis. The default value is WHITE. This option is valid only for time-scaled network diagrams.

CCRITARCS=*color*

specifies the color of arcs connecting critical activities. The procedure uses the values of the E_FINISH and L_FINISH variables (if they are present) in the [Network](#) data set to determine the critical activities. The default value is the value of the [CARCS=](#) option.

CREF=*color*

specifies the color of the reference lines. The default value is WHITE. This option is valid only for time-scaled network diagrams.

CREFBRK=*color*

specifies the color of the lines drawn to denote breaks in the time axis. The default value is WHITE. This option is valid only for time-scaled network diagrams.

FORMCHAR [*index list*]=*'string'*

specifies the characters used for node outlines and arcs. See the [“Line-Printer Options”](#) section on page 639 for a description of this option.

PATTERN=*variable*

specifies an integer-valued variable in the [Network](#) data set that identifies the color number for each node of the network. If the data set contains a variable called `_PATTERN`, this specification is ignored. All the colors available for the full-screen device are used in order corresponding to the number specified in the `PATTERN` variable; if the value of the `PATTERN` variable is more than the number of colors available for the device, the colors are repeated starting once again with the first color. If a `PATTERN` variable is not specified, the procedure uses the first color for noncritical activities, the second color for critical activities, and the third color for supercritical activities.

REFCHAR=*refchar*

specifies the reference character used for drawing reference lines. The default value is “|”. This option is valid only for time-scaled network diagrams.

ZONEPAT

indicates that if a [PATTERN](#) variable is not specified or is missing and if a [ZONE=](#) variable is present, then the node colors are based on the value of the [ZONE=](#) variable.

Graphics Options

ANNOTATE=*SAS-data-set*

specifies the input data set that contains the appropriate annotate variables for the purpose of adding text and graphics to the network diagram. The data set specified must be an Annotate data set. See the [“Using the Annotate Facility”](#) section on page 657 for further details about this option.

ARROWHEAD=integer

specifies the length of the arrowhead in character cell positions. You can specify `ARROWHEAD = 0` to suppress arrowheads altogether. The default value is 1.

CARCS=color

specifies the color to use for drawing the connecting lines between the nodes. If `CARCS=` is not specified, the procedure uses the fourth color in the `COLORS=` list of the `GOPTIONS` statement.

CAXIS=color

specifies the color of the time axis. If `CAXIS=` is not specified, the procedure uses the text color. This option is valid only for time-scaled network diagrams.

CNODEFILL=color

specifies the fill color for all critical nodes of the network diagram. If you specify this option, the procedure uses a solid fill pattern (with the color specified in this option) for all critical nodes, ignoring any fill pattern specified in the `PATTERN` statements; the `PATTERN` statements are used only to obtain the color of the outline for these nodes unless you specify the `CCRITOUT=` option. The default value for this option is the value of the `CNODEFILL=` option, if it is specified; otherwise, the procedure uses the `PATTERN` statements to determine the fill pattern and color.

CCRITARCS=color

specifies the color of arcs connecting critical activities. The procedure uses the values of the `E_FINISH` and `L_FINISH` variables (if they are present) in the [Network](#) data set to determine the critical activities. The default value of this option is the value of the `CARCS=` option.

CCRITOUT=color

specifies the outline color for critical nodes. The default value for this option is the value of the `COUTLINE=` option, if it is specified; otherwise, it is the same as the pattern color for the node.

CENTERID

centers the ID values placed within each node. By default, character valued `ID` variables are left justified and numeric `ID` variables are right justified within each node. This option centers the `ID` values within each node.

CNODEFILL=color

specifies the fill color for all nodes of the network diagram. If you specify this option, the procedure uses a solid fill pattern with the specified color, ignoring any fill pattern specified in the `PATTERN` statements; the `PATTERN` statements are used only to obtain the color of the outline for the nodes, unless you specify the `COUTLINE=` option.

COMPRESS

draws the network on one physical page. By default, the procedure draws the network across multiple pages if necessary, using a default scale that allots one character cell position for each letter within the nodes. Sometimes, to get a broad picture of the network and all its connections, you may want to view the entire network on one screen. If the `COMPRESS` option is specified, `PROC NETDRAW` determines the

horizontal and vertical transformations needed so that the network is compressed to fit on one screen.

COUTLINE=*color*

specifies an outline color for all nodes. By default, the procedure sets the outline color for each node to be the same as the fill pattern for the node. This option is useful when used in conjunction with a solid fill using a light color. Note that if an empty fill pattern is specified, then the COUTLINE= option will cause all nodes to appear the same.

CREF=*color*

specifies the color of the reference lines. If the CREF= option is not specified, the procedure uses the text color. This option is valid only for time-scaled network diagrams.

CREFBRK=*color*

specifies the color of the zigzag break lines. If the CREFBRK= option is not specified, the procedure uses the text color. This option is valid only for time-scaled network diagrams.

CTEXT=*color*

CT=*color*

specifies the color of all text on the network diagram including variable names or labels, values of ID variables, and so on. If CTEXT= is omitted, PROC NETDRAW uses the value specified by the global graphics option CTEXT; if there is no such specification, then the procedure uses the first color in the COLORS= list of the GOPTIONS statement.

DESCRIPTION='*string*'

DES='*string*'

specifies a descriptive string, up to 40 characters in length, that appears in the description field of the master menu in PROC GREPLAY. If the DESCRIPTION= option is omitted, the description field contains a description assigned by PROC NETDRAW.

FILLPAGES

causes the diagram on each page to be magnified (if necessary) to fill up the page.

FONT=*font*

specifies the font of the text. If there is no FONT= specification, PROC NETDRAW uses the font specified by the global graphics option FTEXT= ; if there is no such specification, then the procedure uses hardware characters.

HEIGHT=*h*

HTEXT=*h*

specifies that the height for all text in PROC NETDRAW (excluding the titles and footnotes) be *h* times the value of the global HTEXT= option, which is the default text height specified in the GOPTIONS statement of SAS/GRAPH. The value of *h* must be a positive real number; the default value is 1.0.

HMARGIN=integer

specifies the width of a horizontal margin (in number of character cell positions) for the network in graphics mode. The default width is 1.

HPAGES=*h***NXPAGES=*h***

specifies that the network diagram is to be produced using *h* horizontal pages. However, it may not be possible to use *h* horizontal pages due to intrinsic constraints on the output.

For example, PROC NETDRAW requires that every horizontal page should contain at least one *x* level. Thus, the number of horizontal pages can never exceed the number of vertical levels in the network. The exact number of horizontal pages used by the network diagram is given in the `_ORNETDR` macro variable. See the “[Macro Variable _ORNETDR](#)” section on page 658 for further details.

The appearance of the diagram with respect to the HPAGES= option is also influenced by the presence of other related procedure options. The HPAGES= option performs the task of determining the number of vertical pages in the absence of the VPAGES= option. If the COMPRESS or PCOMPRESS option is specified in this scenario, the chart uses one vertical page (unless the HPAGES= and VPAGES= options are specified). If neither the COMPRESS nor PCOMPRESS option is specified, the number of vertical pages is computed in order to display as much of the chart as possible in a proportional manner.

LREF=linestyle

specifies the linestyle (1-46) of the reference lines. The default linestyle is 1, a solid line. See [Figure 6.5](#) in [Chapter 6](#), “[The GANTT Procedure](#),” for examples of the various line styles available. This option is valid only for time-scaled network diagrams.

LREFBRK=linestyle

specifies the linestyle (1-46) of the zigzag break lines. The default linestyle is 1, a solid line. See [Figure 6.5](#) in [Chapter 6](#), “[The GANTT Procedure](#),” for examples of the various line styles available. This option is valid only for time-scaled network diagrams.

LWCRT=integer

specifies the line width for critical arcs and the node outlines for critical activities. If the LWCRT= option is not specified, the procedure uses the value specified for the [LWIDTH=](#) option.

LWIDTH=integer

specifies the line width of the arcs and node outlines. The default line width is 1.

LWOUTLINE=integer

specifies the line width of the node outlines. The default line width for the node outline is equal to [LWIDTH](#) for noncritical nodes and [LWCRT](#) for critical nodes.

NAME='string'

specifies a string of up to eight characters that appears in the name field of the catalog entry for the graph. The default name is NETDRAW. If either the name specified or the default name duplicates an existing name in the catalog, then the procedure adds a number to the duplicate name to create a unique name, for example, NETDRAW2.

NOARROWFILL

draws arrowheads that are not filled. By default, the procedure uses filled arrowheads.

NOPAGE NUMBER**NONUMBER**

suppresses the page numbers that are displayed in the top right corner of each page of a multipage network diagram. Note that the pages are ordered from left to right, bottom to top (unless the [REVERSEY](#) option is specified).

NOVCENTER

draws the network diagram just below the titles without centering in the vertical direction.

NXNODES=*nx*

specifies the number of nodes that should be displayed horizontally across each page of the network diagram. This option determines the value of the [HPAGES=](#) option; this computed value of HPAGES overrides the specified value for the HPAGES= options.

NYNODES=*ny*

specifies the number of nodes that should be displayed vertically across each page of the network diagram. This option determines the value of the [VPAGES=](#) option; this computed value of VPAGES overrides the specified value for the VPAGES= options.

PAGENUMBER**PAGENUM**

numbers the pages of the network diagram on the top right-hand corner of the page if the diagram exceeds one page. The numbering scheme is from left to right, bottom to top (unless the [REVERSEY](#) option is specified).

PATTERN=*variable*

specifies an integer-valued variable in the [Network](#) data set that identifies the pattern for filling each node of the network. If the data set contains a variable called `_PATTERN`, this specification is ignored. The patterns are assumed to have been specified using PATTERN statements. If a PATTERN variable is not specified, the procedure uses the first PATTERN statement for noncritical activities, the second PATTERN statement for critical activities, and the third PATTERN statement for supercritical activities.

PCOMPRESS

draws the network diagram on one physical page. As with the COMPRESS option, the procedure determines the horizontal and vertical transformation needed so that the network is compressed to fit on one screen. However, in this case, the transformations are such that the network diagram is proportionally compressed. See [Example 7.4](#) on page 667 for an illustration of this option.

If the HPAGES= and VPAGES= options are used to control the number of pages, each page of the network diagram is drawn while maintaining the original aspect ratio.

RECTILINEAR

draws arcs with rectangular corners. By default, the procedure uses rounded turning points and rounded arc merges in graphics mode.

REVERSEY

reverses the order in which the *y* pages are drawn. By default, the pages are ordered from bottom to top in the graphics mode. This option orders them from top to bottom.

ROTATE

rotates the network diagram to change the orientation of the network to be from top to bottom instead of from left to right. For example, you can use this option to draw a Bill of Materials diagram that is traditionally drawn from top to bottom with the Final Product drawn at the top of the tree. In addition to rotating the orientation of the network, use the [ROTATETEXT](#) option to rotate the text within each node. See [Example 7.18](#) on page 716 for an illustration of this option.

This option is similar to the global graphics option, ROTATE (GOPTIONS ROTATE). Note that if the global graphics option is used, titles and footnotes also need to be drawn with an angle specification: A=90. However, some device drivers ignore the global graphics option, ROTATE (for example, the SASGDDMX driver). Use the ROTATE option on the ACTNET statement for such device drivers.

ROTATETEXT

RTEXT

rotates the text within the nodes by 90 degrees. This option is useful when used in conjunction with the [ROTATE](#) option in the ACTNET statement (or the global graphics option ROTATE) to change the orientation of the network to be from top to bottom instead of from left to right. For example, you can use this option to draw an organizational chart that is traditionally drawn from top to bottom with the head of the organization at the top of the chart. If the ROTATETEXT option is specified, then the definitions of the [BOXHT=](#) and [BOXWIDTH=](#) options are reversed. See [Example 7.18](#) on page 716 for an illustration of this option.

SEPARATEARCS

separates the arcs to follow distinct tracks. By default, the procedure draws all segments of the arcs along a central track between the nodes, which may cause several arcs to be drawn on top of one another. If the SEPARATEARCS option is specified, the procedure may increase the values of the [XBETWEEN=](#) and [YBETWEEN=](#) options to accommodate the required number of lines between the nodes.

VMARGIN=*integer*

specifies the width of a vertical margin (in number of character cell positions) for the network. The default width is 1.

VPAGES=*v*

NYPAGES=*v*

specifies that the network diagram is to be produced using *v* vertical pages. This, however, may not be possible due to intrinsic constraints on the output. For example,

PROC NETDRAW requires that every vertical page should contain at least one *y* level. Thus, the number of vertical pages can never exceed the number of horizontal levels in the network. The exact number of vertical pages used by the procedure is provided in the `_ORNETDR` macro variable. See the “[Macro Variable _ORNETDR](#)” section on page 658 for further details.

The appearance of the diagram with respect to the `VPAGES=` option is also influenced by the presence of other related procedure options. The `VPAGES=` option performs the task of determining the number of horizontal pages in the absence of the `HPAGES=` option (or the `NXNODES=` option). If the `COMPRESS` or `PCOMPRESS` option is specified (without the `HPAGES=` or `NXNODES=` options), the chart uses one horizontal page. If neither the `COMPRESS` nor `PCOMPRESS` option is specified, the number of horizontal pages is computed in order to display as much of the chart as possible in a proportional manner.

WEB=*variable*

HTML=*variable*

specifies the character variable in the Network data set that identifies an HTML page for each activity. The procedure generates an HTML image map using this information for each node in the network diagram.

ZONEPAT

indicates that if a `PATTERN=` variable is not specified or is missing and if a `ZONE=` variable is present, then the node patterns are based on the value of the `ZONE=` variable.

Line-Printer Options

BRKCHAR=*brkchar*

specifies the character used for drawing the zigzag break lines down the chart at break points of the time axis. The default value is `>`. This option is valid only for time-scaled network diagrams.

FORMCHAR [*index list*]=*'string'*

specifies the characters used for node outlines and arcs. The value is a string 20 characters long. The first 11 characters define the 2 bar characters, vertical and horizontal, and the 9 corner characters: upper-left, upper-middle, upper-right, middle-left, middle-middle (cross), middle-right, lower-left, lower-middle, and lower-right. These characters are used to outline each node and connect the arcs. The nineteenth character denotes a right arrow. The default value of the `FORMCHAR=` option is `|----|+|----+=|-\<>*`. Any character or hexadecimal string can be substituted to customize the appearance of the diagram. Use an index list to specify which default form character each supplied character replaces, or replace the entire default string by specifying the full character replacement string without an index list. For example, change the four corners of each node and all turning points of the arcs to asterisks by specifying

```
FORMCHAR(3 5 7 9 11)= '*****'
```

Specifying

```
formchar='          ' (11 blanks)
```

produces a network diagram with no outlines for the nodes (as well as no arcs). For further details about the FORMCHAR= option see Chapter 5, “The DTREE Procedure,” and Chapter 6, “The GANTT Procedure.”

REFCHAR=*refchar*

specifies the reference character used for drawing reference lines. The default value is “|”. This option is valid only for time-scaled network diagrams.

Details

Network Input Data Set

The Network input data set contains the precedence information, namely the activity-successor information for all the nodes in the network. The minimum amount of information that is required by PROC NETDRAW is the activity-successor information for the network. Additional information in the input data set can be used by the procedure to add detail to the nodes in the diagram or control the layout of the network diagram.

Three types of data sets are typically used as the Network data set input to PROC NETDRAW. Which type of data set you use depends on the stage of the project:

- The [Activity](#) data set that is input to PROC CPM is the first type. In the initial stages of project definition, it may be useful to get a graphical representation of the project showing all the activity precedence constraints.
- The [Schedule](#) data set produced by PROC CPM (as the OUT= data set) is the second type. When a project is in progress, you may want to obtain a network diagram showing all the relevant start and finish dates for the activities in the project, in addition to the precedence constraints. You may also want to draw a time-scaled network diagram, with the activities arranged according to the start or finish times corresponding to any of the different schedules produced by PROC CPM.
- The [Layout](#) data set produced by PROC NETDRAW (as the OUT= data set) is the third type. Often, you may want to draw network diagrams of the project every week showing updated information (as the project progresses); if the network logic has not changed, it is not necessary to determine the placement of the nodes and the routing of the arcs every time. You can use the [Layout](#) data set produced by PROC NETDRAW that contains the node and arc positions, update the start and finish times of the activities or merge in additional information about each activity, and use the modified data set as the Network data set input to PROC NETDRAW. The new network diagram will have the same layout as the earlier diagram but will contain updated information about the

schedule. Such a data set may also be useful if you want to modify the layout of the network by changing the positions of some of the nodes. See the “Controlling the Layout” section on page 648 for details on how the layout information is used by PROC NETDRAW. If the Layout data set is used, it contains the variables `_FROM_` and `_TO_`; hence, it is not necessary to specify the `ACTIVITY=` and `SUCCESSOR=` options. See Example 7.13 on page 699 and Example 7.14 on page 703 for illustrations of the use of the Layout data set.

The minimum information required by PROC NETDRAW from the Network data set is the variable identifying each node in the network and the variable (or variables) identifying the immediate successors of each node. In addition, the procedure can use other optional variables in the data set to enhance the network diagram. The procedure uses the variables specified in the `ID=` option to label each node. The procedure also looks for default variable names in the Network data set that are added to the list of ID variables; the default variable names are `E_START`, `E_FINISH`, `L_START`, `L_FINISH`, `S_START`, `S_FINISH`, `A_START`, `A_FINISH`, `T_FLOAT`, and `F_FLOAT`. The format used for determining the location of these variables within each node is described in the “Format of the Display” section on page 644. See the “Variables in the Network Data Set” section on page 641 for a table of all the variables in the Network data set and their interpretations by PROC NETDRAW.

If the Network data set contains the variables `_X_` and `_Y_` identifying the x and y coordinates of each node and each turning point of each arc in the network, then this information is used by the procedure to draw the network. Otherwise, the precedence relationships among the activities are used to determine the layout of the network. It is possible to specify only the node positions and let the procedure determine the routing of all the arcs. However, partial information cannot be augmented by the procedure.

Note: If arc information is provided, the procedure assumes that it is complete and correct and uses it exactly as specified.

Variables in the Network Data Set

The NETDRAW procedure expects all the network information to be contained in the Network input data set named by the `DATA=` option. The network information is contained in the `ACTIVITY` and `SUCCESSOR` variables. In addition, the procedure uses default variable names in the Network data set for specific purposes. For example, the `_X_` and `_Y_` variables, if they are present in the Network data set, represent the coordinates of the nodes, the `_SEQ_` variable indexes the turning points of each arc of the network, and so on.

In addition to the network precedence information, the Network data set may also contain other variables that can be used to change the default layout of the network. For example, the nodes of the network can be aligned in the horizontal direction using the `ALIGN=` specification, or they can be divided into horizontal bands (or zones) using a `ZONE` variable.

Table 7.15 lists all of the variables associated with the Network data set and their interpretations by the NETDRAW procedure. Note that all the variables are identified to the procedure in the ACTNET statement. Some of the variables use default names that are recognized by the procedure to denote specific information, as explained previously. The table indicates if the variable is default or needs to be identified in the ACTNET statement.

Table 7.15. Network Data Set and Associated Variables

Statement	Variable Name	Interpretation
ACTNET	ACTIVITY	Activity or node name
	ALIGN	Align variable for time-scaled network
	DURATION	Duration of activity
	ID	Additional variables to be displayed
	PATTERN	Pattern number
	SUCCESSOR	Immediate successor
	WEB	HTML page corresponding to activity
	ZONE	Zone variable for dividing network
Default Variable Names	A_FINISH	default ID variable
	A_START	default ID variable
	E_FINISH	default ID variable
	E_START	default ID variable
	F_FLOAT	default ID variable
	L_FINISH	default ID variable
	L_START	default ID variable
	S_FINISH	default ID variable
	S_START	default ID variable
	T_FLOAT	default ID variable
	FROM	supersedes ACTIVITY= specification
	_PATTERN	supersedes PATTERN= specification
	SEQ	index of turning point in arc
	TO	supersedes SUCCESSOR= specification
	X	<i>x</i> coordinate of node or arc turning point
	Y	<i>y</i> coordinate of node or arc turning point

Missing Values

Missing values are not allowed for the **ACTIVITY**, **_X_**, **_Y_**, and **_SEQ_** variables. Missing values for the **SUCCESSOR** and **ID** variables are ignored. Missing values are not allowed for the **ALIGN=** variable if the **QUITMISSINGALIGN** option is specified; otherwise, the procedure determines suitable values for the **ALIGN=** variable using the topological ordering of the network nodes.

Layout of the Network

The network layout is determined in two stages. First, the precedence relationships are used to determine the positions of the nodes, which are then used to determine a routing of the arcs. The positions of the nodes and arcs are identified by specifying their x and y coordinates in a grid. Figure 7.7 shows a sample grid and explains some of the conventions followed by PROC NETDRAW in determining the node and arc layout. This notation will be useful in later sections that describe the [Layout](#) data set and how you can control the layout of the diagram. The asterisks in the figure represent possible positions for the nodes of the network. The arcs are routed between the possible node positions. For example, node **A** has coordinates (1, 3) and node **B** has coordinates (2, 1). The arc connecting them has two turning points and is completely determined by the two pairs of coordinates (1.5, 3) and (1.5, 1); here, $x = 1.5$ implies that the position is midway between the x coordinates 1 and 2.

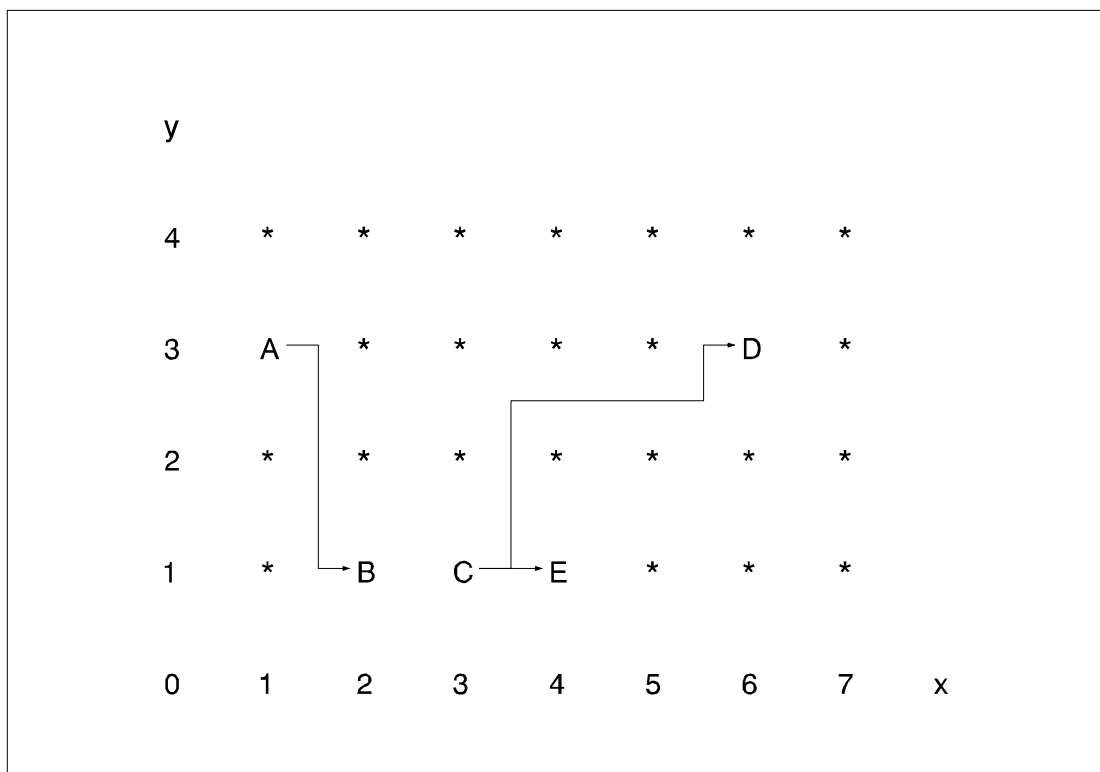


Figure 7.7. Sample Grid and Coordinates for Node and Arc Layout

PROC NETDRAW sets $x = 1$ for all nodes with no predecessors; the x coordinates for the other nodes are determined so that each node is placed to the immediate right of all its predecessors; in other words, no node will appear to the left of any of its predecessors or to the right of any of its successors in the network diagram. The nodes are placed in topological order: a node is placed only after all its predecessors have been placed. Thus, the node-placement algorithm requires that there should be no cycles in the network. The y coordinates of the nodes are determined by the procedure using several heuristics designed to produce a reasonable compact diagram of the network. To draw a network that has cycles, use the [BREAKCYCLE](#) option,

or you can specify the node coordinates or an `ALIGN=` variable to circumvent the requirement of a topological ordering of the nodes (see the second part of [Example 7.12](#) on page 694).

Note that the x and y coordinates fix only a relative positioning of the nodes and arcs. The actual distance between two nodes, the width and height of each node, and so on can be controlled by specifying desired values for the options that control the format of the display, namely, `BOXHT=`, `BOXWIDTH=`, and so on. See the “[Format of the Display](#)” section on page 644 for details on these options.

By default, the procedure routes the arcs using a simple heuristic that uses, at most, four turning points: the arc leaves the predecessor node from its right edge, turns up or down according to whether the successor is above or below the current node position, then tracks horizontally across to the vertical corridor just before the successor node, and then tracks in a vertical direction to meet the successor node. For example, see the tracking of the arc connecting nodes **C** and **D** in [Figure 7.7](#).

For networks that include some nonstandard precedence constraints, the arcs may be drawn from and to the appropriate edges of the nodes, depending on the type of the constraint.

The default routing of the arcs may lead to an unbalanced diagram with too many arcs in one section and too few in another. The `DP` option in the `ACTNET` statement causes the procedure to use a dynamic programming algorithm to route the arcs. This algorithm tries to route the arcs between the nodes so that not too many arcs pass through any interval between two nodes. The procedure sets the maximum number of arcs that are allowed to be routed along any corridor to be equal to the maximum number of successors for any node. The `HTRACKS=` and `VTRACKS=` options enable you to set these maximum values: `HTRACKS` specifies the maximum number of arcs that are allowed to pass horizontally through any point while `VTRACKS` specifies the same for arcs in the vertical direction. See [Example 7.7](#) on page 677 for an illustration of the `HTRACKS=` option.

The layout of the network for time-scaled and zoned network diagrams is discussed in the “[Time-Scaled Network Diagrams](#)” section on page 649 and the “[Zoned Network Diagrams](#)” section on page 651, respectively. The “[Organizational Charts or Tree Diagrams](#)” section on page 652 describes the layout of the diagram when the `TREE` option is specified.

Format of the Display

As explained in the previous section, the layout of the network is determined by the procedure in terms of x and y coordinates on a grid as shown in [Figure 7.7](#). The distance between nodes and the width and height of each node is determined by the values of the format control options: `XBETWEEN=`, `YBETWEEN=`, `BOXHT=`, and `BOXWIDTH=`. Note that if the `ROTATETEXT` option is specified (in graphics mode), then the definitions of the `BOXHT=` and `BOXWIDTH=` options are reversed.

The amount of information that is displayed within each node is determined by the variables specified by the `ID=` option, the number of default variables found in the `Network` data set, and whether the `NOLABEL` and `NODEFID` options are specified.

The values of the variables specified by the ID= option are placed within each node on separate lines. If the NOLABEL option is in effect, only the values of the variables are written; otherwise, each value is preceded by the name of the ID variable truncated to three characters. Recall from the “Syntax” section on page 621 that, in addition to the variables specified using the ID= option, the procedure also displays additional variables. These variables are displayed below the variables explicitly specified by the ID= option, in pre-determined relative positions within each node (see Figure 7.8.)

ID1	
.	
.	
.	
IDn	
<i>Activity variable</i>	<i>Duration variable</i>
E_START	E_FINISH
L_START	L_FINISH
S_START	S_FINISH
A_START	A_FINISH
T_FLOAT	F_FLOAT

Figure 7.8. Display Format for the Variables within Each Node

Note: If a node is identified as a successor (through a SUCCESSOR variable) and is never identified with the ACTIVITY variable, the ID values for this node are never defined in any observation; hence, this node will have missing values for all the ID variables.

If the SHOWSTATUS option is specified and the Network data set contains progress information (in either the STATUS variable or the A_START and A_FINISH variables), the procedure appropriately marks each node referring to activities that are completed or in progress. See Example 7.8 on page 680 for an illustration of the SHOWSTATUS option.

The features just described pertain to all three modes of the procedure. In addition, there are options to control the format of the display that are specific to the mode of invocation of the procedure. For graphics quality network diagrams, you can choose the color and pattern used for each node separately by specifying a different pattern number for the PATTERN variable, identified in the ACTNET statement (for details, see the “Graphics Version” section on page 656). For line-printer or full-screen network diagrams, the FORMCHAR= option enables you to specify special boxing characters that enhance the display; for full-screen network diagrams, you can also choose the color of the nodes using the PATTERN= option.

By default, all arcs are drawn along the center track between two consecutive nodes. The SEPARATEARCS option, which is available in the graphics version, separates arcs in the same corridor by drawing them along separate tracks, thus preventing them from being drawn on top of each other.

If the network fits on one page, it is centered on the page; in the graphics mode, you can use the `NOVCENTER` option to prevent centering in the vertical direction so that the network is drawn immediately below the title. If the network cannot fit on one page, it is split onto different pages appropriately. See the “Page Format” section on page 646 for a description of how the pages are split.

Page Format

	7	8	9
	4	5	6
	1	2	3

Figure 7.9. Page Layout

As explained in the “Format of the Display” section on page 644, if the network fits on one page, it is centered on the page (unless the `NOVCENTER` option is specified); otherwise, it is split onto different pages appropriately, and each page is drawn starting at the bottom left corner. If the network is drawn on multiple pages, the procedure numbers each page of the diagram on the top right corner of the page. The pages are numbered starting with the bottom left corner of the entire picture. Thus, if the network diagram is broken into three horizontal and three vertical levels and you want to paste all the pieces together to form one picture, they should be arranged as shown in Figure 7.9.

The number of pages of graphical output produced by the NETDRAW procedure depends on several options such as the `NXNODES=`, `NYNODES=`, `HPAGES=`, `VPAGES=`, `COMPRESS`, `PCOMPRESS`, `HEIGHT=`, and the `ID=` options. The value of the `HTEXT=` option and the number of variables specified in the `ID=` options determines the size of each node in the network diagram, which in turn affects the number of horizontal and vertical pages needed to draw the entire network. The number of pages is also affected by the global specification of the `HPOS=`, `VPOS=`, `H SIZE=`, and `V SIZE=` graphics options.

The `COMPRESS` and `PCOMPRESS` options force the entire network diagram to be drawn on a single page. You can explicitly control the number of horizontal and vertical pages using the `HPAGES=` and `VPAGES=` options. The `NXNODES=` and `NYNODES=` options enable you to specify the number of nodes in the horizontal and vertical directions, respectively, on each page of the network diagram.

For examples of these options and how they affect the network diagram output, see Example 7.5 on page 671.

Layout Data Set

The Layout data set produced by PROC NETDRAW contains all the information needed to redraw the network diagram for the given network data. In other words, the Layout data set contains the precedence information, the **ID** variables that are used in the current invocation of the procedure, and variables that contain the coordinate information for all the nodes and arcs in the network.

The precedence information used by the procedure is defined by two new variables named `_FROM_` and `_TO_`, which replicate the **ACTIVITY** and **SUCCESSOR** variables from the **Network** data set. Note that the Layout data set has only one `_TO_` variable even if the Network data set has multiple **SUCCESSOR** variables; if a given observation in the Network data set defines multiple successors for a given activity, the Layout data set defines a new observation for each of the successors. In fact, for each (node, successor) pair, a sequence of observations, defining the turning points of the arc, is saved in the Layout data set; the number of observations corresponding to each pair is equal to one plus the number of turns in the arc connecting the node to its successor. Suppose that a node 'C' has two successors, 'D' and 'E,' and the arcs connecting 'C' and 'D' and 'C' and 'E' are routed as shown in [Figure 7.7](#) on page 643. Then, [Figure 7.10](#) illustrates the format of the observations corresponding to the two (`_FROM_`, `_TO_`) pairs of nodes, ('C', 'D') and ('C', 'E').

<code>_FROM_</code>	<code>_TO_</code>	<code>_X_</code>	<code>_Y_</code>	<code>_SEQ_</code>	<code>_PATTERN</code>	ID variables
C	D	3	1	0	1	
C	D	3.5	1	1	.	
C	D	3.5	2.5	2	.	
C	D	5.5	2.5	3	.	
C	D	5.5	3	4	.	
C	E	3	1	0	1	
		.			.	
		.			.	
		.			.	

Figure 7.10. Sample Observations in the Layout Data Set

For every (node, successor) pair, the first observation (`_SEQ_ = '0'`) gives the coordinates of the predecessor node; the succeeding observations contain the coordinates of the turning points of the arc connecting the predecessor node to the successor. The data set also contains a variable called `_PATTERN`, which contains the pattern number that is used for coloring the node identified by the `_FROM_` variable. The value of this variable is missing for observations with `_SEQ_ > 0`.

Controlling the Layout

As explained in the “[Layout of the Network](#)” section on page 643, the procedure uses the precedence constraints between the activities to draw a reasonable diagram of the network. A very desirable feature in any procedure of this nature is the ability to change the default layout. PROC NETDRAW provides two ways of modifying the network diagram:

- using the full-screen interface
- using the [Network](#) data set

The full-screen method is useful for manipulating the layout of small networks, especially networks that fit on a handful of screens. You can use the full-screen mode to examine the default layout of the network and move the nodes to desired locations using the MOVE command from the command line or by using the appropriate function key. When a node is moved, the procedure reroutes all the arcs that connect to or from the node; other arcs are unchanged. For details about the MOVE command, see the “[Full-Screen Version](#)” section on page 653.

You can use the [Network](#) data set to modify or specify completely the layout of the network. This method is useful if you want to draw the network using information about the network layout that has been saved from an earlier invocation of the procedure. Sometimes you may want to specify only the positions of the node and let the procedure determine the routing of the arcs. The procedure looks for three default variables in the data set: `_X_`, `_Y_`, and `_SEQ_`. The `_X_` and `_Y_` variables are assumed to denote the x and y coordinates of the nodes and all the turning points of the arcs connecting the nodes. The variable `_SEQ_` is assumed to denote the order of the turning points. This interpretation is consistent with the values assigned to the `_X_`, `_Y_`, and `_SEQ_` variables in the [Layout](#) data set produced by PROC NETDRAW. If there is no variable called `_SEQ_` in the data set, the procedure assumes that only the node positions are specified and uses the specified coordinates to place the nodes and determines the routing of the arcs corresponding to these positions. If there is a variable called `_SEQ_`, the procedure requires that the turning points for each arc be specified in the proper order, with the variable `_SEQ_` containing numbers sequentially starting with 1 and continuing onward. The procedure then draws the arcs exactly as specified, without checking for consistency or interpolating or extrapolating turning points that may be missing.

The `ALIGN=` variable provides another means of controlling the node layout (see the “[Time-Scaled Network Diagrams](#)” section on page 649). This variable can be used to specify the x coordinates for the different nodes of the network; the procedure then determines the y coordinates. Note that time-scaled network diagrams (without an `ALIGN=` specification) are equivalent to network diagrams drawn with the `ALIGN=` variable being set to the `E_START` variable.

You can also control the placement of the nodes using the `ZONE=` option (see the “[Zoned Network Diagrams](#)” section on page 651). The procedure uses the values of the `ZONE` variable to divide the network into horizontal zones. Thus, you can control

the horizontal placement of the nodes using the `ALIGN=` option and the vertical placement of the nodes using the `ZONE=` option.

For networks that have a tree structure, the `TREE` option draws the network as a tree, thus providing another layout option (see the “[Organizational Charts or Tree Diagrams](#)” section on page 652). The procedure draws the tree from left to right, with the root at the left edge of the diagram. Thus, the children of each node are drawn to the right of the node. In the graphics mode of invocation, you can use the `ROTATE` option in conjunction with the `ROTATE` option in the `ACTNET` statement (or the global graphics option `ROTATE`) to obtain a top-down tree diagram.

Time-Scaled Network Diagrams

By default, PROC NETDRAW uses the topological ordering of the activity network to determine the x coordinates of the nodes. As a project progresses, you may want to display the activities arranged according to their time of occurrence. Using the `TIMESCALE` option, you can draw the network with a time axis at the top and the nodes aligned according to their early start times, by default. You can use the `ALIGN=` option to specify any of the other start or finish times in the `Network` data set. In fact, PROC NETDRAW enables you to align the nodes according to any numeric variable in the data set.

If the `TIMESCALE` option is specified without any `ALIGN=` specification, the procedure chooses one of the following variables as the `ALIGN=` variable: `E_START`, `L_START`, `S_START`, or `A_START`, in that order. The first of these variables that is found is used to align the nodes. The minimum and maximum values of the `ALIGN=` variable are used to determine the time axis. The format of this variable is used to determine the default value for the `MININTERVAL=` option. The value of the `MININTERVAL=` option (or the default value) is used to determine the format of the time axis. You can override the format based on *mininterval* by specifying the desired format for the `ALIGN=` variable (using the `FORMAT` statement to indicate a standard SAS format or a special user-defined format) and the `USEFORMAT` option in the `ACTNET` statement. [Table 7.16](#) lists the valid values of *mininterval* corresponding to the type of the `ALIGN=` variable and the default format corresponding to each value of *mininterval*. For each value in the first column, the first value of *mininterval* listed is the default value of the `MININTERVAL=` option corresponding to that type of the `ALIGN=` variable.

Several options are available in PROC NETDRAW to control the spacing of the nodes and the scaling of a time-scaled network diagram:

- The `MININTERVAL=` option enables you to scale the network diagram: one tick mark is associated with one unit of *mininterval*. Thus, if *mininterval* is `DAY`, each column is used to represent one day and all activities that start on the same day are placed in the same column. By default, the procedure omits any column (tick mark) that does not contain any node.
- The `LINEAR` option enables you to print a tick mark corresponding to every day (or the unit of *mininterval*). Note that, for a project that has few activities

spread over a large period of time, the LINEAR option can lead to a network diagram that is very wide.

- The **MAXNULLCOLUMN=** option specifies the maximum number of empty columns that is allowed between two consecutive nonempty columns. The LINEAR option is equivalent to specifying *maxncol*=infinity, while the default time-scaled network diagram is drawn with *maxncol*=0.
- The **NLEVELSPERCOLUMN=** option enables you to contract the network diagram by combining a few columns. For example, if *mininterval* is DAY and *nlevelspercol* is 7, each column contains activities that start within seven days of each other; note that the same effect can be achieved by setting *mininterval* to be WEEK.

Table 7.16. MININTERVAL Values and Axis Format

ALIGN Variable Type	MININTERVAL	Axis Label Format
number		numeric format
SAS time	HOUR	HHMM5.
	MINUTE	HHMM5.
	SECOND	TIME8.
SAS date	DAY	DATE7.
	WEEKDAY	DATE7.
	WEEK	DATE7.
	MONTH	MONYY5.
	QTR	MONYY5.
	YEAR	MONYY5.
	SAS datetime	DTDAY	DATE7.
WORKDAY		DATE7.
DTWRKDAY		DATE7.
DTSECOND		DATETIME16.
DTMINUTE		DATETIME16.
DTHOUR		DATETIME13.
DTWEEK		DATE7.
DTMONTH		MONYY5.
DTQTR		MONYY5.
DTYEAR		MONYY5.

The node-placement algorithm described in the “[Layout of the Network](#)” section on page 643 is modified slightly for time-scaled network diagrams. The *x* coordinate of each node is determined by the value of the ALIGN= variable. The scaling options just described are used to determine the tick mark corresponding to the node. The *y* coordinate is determined as before. Once the node placement is completed, the arc routing algorithm is the same as described earlier.

Note: Since the node placement for time-scaled networks is determined by the ALIGN= variable, it is possible that some of the arcs between the nodes may have to

be routed from right to left instead of from left to right; in other words, there may be some backward arcs. Note also that, if the `ALIGN=` variable is used to determine the x coordinates of the nodes, the procedure can also draw networks that contain cycles (see the second part of [Example 7.12](#) on page 694).

Several other options are available to control the appearance of time-scaled network diagrams: `AUTOREF`, `BRKCHAR=`, `CAXIS=`, `CREF=`, `CREFBRK=`, `FRAME`, `LREF=`, `LREFBRK=`, `NOREPEATAXIS`, `NOTIMEAXIS`, `REFBREAK`, `REFCHAR=`, and `SHOWBREAK`. These options are described in the “[Syntax](#)” section on page 621.

Zoned Network Diagrams

Most projects have at least one natural classification of the different activities in the project: department, type of work involved, location of the activity, and so on. The `ZONE=` option enables you to divide the network diagram into horizontal bands or zones corresponding to this classification. The procedure uses the following rules to place the nodes in a zoned network diagram:

- The values of the `ZONE` variable are used to define as many zones as there are distinct values of this variable.
- Each node of the network is drawn within its corresponding zone.
- The number of rows within each zone is determined by the maximum number of nodes in any given column that correspond to that zone.
- The values of the `ZONE` variable do not need to be sorted in any particular order, nor do they need to be grouped by distinct values.
- The zones are ordered according to the order of appearance of the different values of the `ZONE` variable in the [Network](#) data set. This enables you to choose any order for the zone values.
- For arcs that connect two nodes within the same zone, the arc lies entirely within the zone; in other words, all the turning points of the arc have y coordinates that are between the minimum and maximum y coordinates for the zone.
- Each zone is labeled by the value of the `ZONE` variable unless the [NOZONELABEL](#) option is specified.
- Each zone is separated from the next by a horizontal line drawn across the width of the network unless the [NOZONELABEL](#) option is specified.
- In the graphics and full-screen modes of invocation of the procedure, you can use the [ZONEPAT](#) option to color the nodes in each zone differently using different pattern statements. In the graphics mode, the first zone uses the first `PATTERN` statement, the second zone uses the second `PATTERN` statement, and so on; in full-screen mode, the colors available for the device are repeated in cyclic order. Note that the values of the [PATTERN](#) variable (or the default `_PATTERN` variable, if it exists in the [Network](#) data set) override the node patterns dictated by the [ZONEPAT](#) option.

Organizational Charts or Tree Diagrams

The NETDRAW procedure automatically draws any acyclic network; it does not have to be a representation of a project. You can also use the procedure to draw a general directed graph that has cycles, if node location is specified or if the **BREAKCYCLE** option is specified. The procedure attempts to draw the network in a compact fashion, which may not always produce the expected result. Trees form one such class of directed graphs that have an inherent natural layout that may not be produced by the default layout of PROC NETDRAW. The **TREE** option in the **ACTNET** statement exploits the tree structure of the network by laying the nodes out in the form of a tree.

A directed graph is said to be a tree if it has a root and there is a unique directed path from the root to every node in the tree. An equivalent characterization of a tree is that the root node has no predecessors and every other node has exactly one predecessor (Even 1979). Typical examples of trees that arise in project management are organizational charts or work breakdown structures. If the **TREE** option is specified, the NETDRAW procedure checks if the network has a tree structure and draws the network with the root at the left edge of the diagram and the children of each node appearing to the right of the node. In other words, the tree is drawn from left to right.

The NETDRAW procedure enables you to specify multiple trees in the same **Network** data set; each tree is drawn separately in the same diagram with all the roots appearing at the left edge of the diagram. Thus, you can use the **TREE** option as long as every node in the network has *at most* one predecessor. If you specify the **TREE** option and some node has multiple predecessors, the **TREE** option is ignored and the procedure uses the default node-layout algorithm.

There are several features that control the appearance of the tree:

- The children of each node are placed in the order of occurrence in the **Network** data set. The (x, y) coordinates of each node are required to be integers. The procedure attempts to place each node at the center of all its children, subject to the requirement that the coordinates must be integers. This requirement may cause some of the nodes to be positioned slightly off-center. See **Example 7.15** on page 705.
- The **SEPARATESONS** option separates the children of a node, if necessary, to enable the parent node to be exactly centered with respect to its children. See the second part of **Example 7.15** on page 705.
- The **CENTERSUBTREE** option can be used to center each node with respect to the entire subtree originating from the node instead of centering it with respect to its children.
- In graphics mode, you can change the orientation of the network to be from top to bottom instead of from left to right. To do so, use the **ROTATETEXT** option in the **ACTNET** statement to rotate the text within the nodes and the **ROTATE** option in the **ACTNET** statement (or the **ROTATE** global graphics option) to rotate the entire diagram by 90 degrees. See **Example 7.18** on page 716 for an illustration of this feature.

Full-Screen Version

You can invoke PROC NETDRAW in full-screen mode by specifying FS (or FULLSCREEN) in the PROC NETDRAW statement. The statement specifications are the same as for the line-printer mode. The full-screen mode offers you a convenient way to browse the network diagram of the project and change the layout of the network by moving the nodes of the network to desired locations. However, you cannot move a node to any position that violates the precedence constraints that must be satisfied by the node. In other words, you cannot move a node to the left of any of its predecessors or to the right of any of its successors. For time-scaled network diagrams, you cannot move a node out of the column corresponding to the value of the ALIGN= variable. For zoned network diagrams you cannot move a node out of its zone.

The format control options are treated in the same way as for the line-printer version, with some minor changes. It is assumed that the main purpose of invoking the procedure is to gain a general picture of the layout of the entire network and to modify it to some extent. In an effort to display as much of the network as possible, the initial display on the screen is drawn with only one row and three columns for each node. In other words, the BOXHT=, BOXWIDTH=, XBETWEEN=, and YBETWEEN= options are ignored by the procedure in drawing the initial display. However, the full-screen commands supported by PROC NETDRAW enable you to change the scale of the diagram. You can display as much or as little information within each node by invoking the SCALE ROW or the SCALE COL command or both. The SCALE MAX command causes the procedure to display the diagram using the values specified in the ACTNET statement or the dimensions that would be required to display all the ID information, whichever is larger. The SCALE RESET command returns the scaling to the initial values used for display.

The nodes of the network are color coded on the basis of the PATTERN variable. If there is no PATTERN variable, then the nodes are color coded depending on whether the activities are normal, critical, or supercritical. The nodes are drawn in reverse video. By default, the nodes are drawn without an outline; however, there is an OUTLINE command that lets you toggle back and forth between an outlined or non-outlined node. Using an outline for the node is useful if you want to obtain a printout of the screen display using SPRINT; it helps mark the boundary of each node clearly.

Commands

Table 7.17 lists the commands that can be invoked from the command line in the full-screen version of PROC NETDRAW. These commands are explained in greater detail in this section.

Table 7.17. Full-Screen Commands and Their Purposes

Scrolling	Controlling Display	Changing Network Layout	Exiting
BACKWARD	OUTLINE	CLEAR	GEND
FORWARD	SCALE	MOVE	END
LEFT			CANCEL
RIGHT			
TOP			
BOTTOM			
VSCROLL			
HSCROLL			

BACKWARD

scrolls toward the top of the network by the VSCROLL amount. **BACKWARD MAX** scrolls to the top of the network. You can specify the vertical scroll amount for the current command as **BACKWARD PAGE | HALF | *n***.

BOTTOM

scrolls to the bottom of the network.

CANCEL

ends the current invocation of the procedure.

CLEAR

clears any outstanding move commands.

GEND

ends the current invocation of the procedure after drawing the network in graphics mode with the compress option.

END

ends the current invocation of the procedure.

FORWARD

scrolls toward the bottom of the network by the VSCROLL amount. **FORWARD MAX** scrolls to the bottom of the network. You can also specify the vertical scroll amount for the current command as **FORWARD PAGE | HALF | *n***.

HELP

displays a help screen listing all the full-screen commands specific to PROC NETDRAW.

HOME

moves the cursor to the command line.

HSCROLL

sets the amount that information scrolls horizontally when you execute the **LEFT** or **RIGHT** command. The format is **HSCROLL PAGE | HALF | *n***. The specification is assumed to be in number of horizontal levels. **HSCROLL PAGE** sets the scroll

amount to be the number of horizontal levels that fit on one screen; HSCROLL HALF is half that amount; HSCROLL n sets the horizontal scroll amount to n levels.

KEYS

displays current function key settings for the NETDRAW procedure.

LEFT

scrolls toward the left boundary of the network by the HSCROLL amount. LEFT MAX scrolls to the left boundary. You can specify the horizontal scroll amount for the current command as LEFT PAGE | HALF | n .

MOVE

specifies a node to be moved or a place to move a node to. You can specify these in any order. Thus, you can first position the cursor on the node that you want to move, issue the MOVE command, and then position the cursor at a target position and issue the MOVE command again. If the target position is valid, the node is moved. You can also first specify the target position and then indicate the node that is to be moved.

Note: For a standard network, a node cannot be moved to any position that violates the topological ordering of the nodes in the network. For time-scaled network diagrams, you cannot move a node to a level corresponding to a different tick mark. For zoned network diagrams, you cannot move a node out of its zone.

OUTLINE

causes an outline to be drawn around each node in the network. This is useful if you want to print a copy of the screen by using the SPRINT command. The OUTLINE command works like an on/off switch: you can turn it off by entering the command again.

RIGHT

scrolls toward the right boundary of the network by the HSCROLL amount. RIGHT MAX scrolls to the right boundary. You can also specify the horizontal scroll amount for the current command as RIGHT PAGE | HALF | n .

SCALE

controls the scaling of the nodes and the space between nodes. The format of this command is SCALE MAX | MIN | RESET | ROW MAX | COL MAX | ROW MIN | COL MIN | ROW n | COL n | $+n$ | $-n$. The number n denotes the number of character positions. SCALE MIN displays as many nodes on the screen as can fit. SCALE MAX enables as many rows and columns per node as is required to display all the information that pertains to it. SCALE ROW MAX displays the maximum number of rows per node. SCALE COL MAX displays the maximum number of columns per node. SCALE ROW n sets the number of rows per node to n . SCALE ROW $+n$ increases the number of rows per node by n . SCALE COL n sets the number of columns per node to n . SCALE COL $+n$ increases the number of columns per node by n . SCALE RESET sets the values to be the same as for the initial display. Note that none of these values can be greater than the dimensions of the screen.

TOP

scrolls to the top of the network.

VSCROLL

sets the amount by which information scrolls vertically when you execute the BACKWARD or FORWARD command. The format is VSCROLL PAGE | HALF | n . The specification is assumed to be in number of vertical levels. VSCROLL PAGE sets the scroll amount to be the number of vertical levels that fit on one screen; VSCROLL HALF is half that amount; VSCROLL n sets the vertical scroll amount to n levels.

Full-Screen Global Commands

Most of the global commands used in SAS/FSP software are also valid with PROC NETDRAW. Some of the commands used for printing screens are described in the “Global Commands” section of Chapter 6, “The GANTT Procedure.”

Graphics Version

Several options are available in the ACTNET statement to enhance the appearance of the network diagram in graphics mode. These are described in the “Graphics Options” section on page 633. The format control options BOXWIDTH=, BOXHT=, XBETWEEN=, and YBETWEEN= are also valid in this mode and can be used to control the width and height of each node and the distance between the nodes. These parameters are specified in terms of number of character cell positions. The number of positions available on one page depends on the graphics device that is used; thus, if a plotter is used with large paper, more of the network will be drawn on a single page. Further, you can control the number of character cell positions on a page by changing the values of the global graphics options (HPOS= and VPOS=). Note that the NETDRAW procedure is not supported with the ActiveX or Java series of devices on the GOPTIONS statement.

You can also control the number of nodes on a given page by specifying the NXNODES= and NYNODES= options. The HPAGES= and VPAGES= options control the number of pages in the horizontal and vertical directions. Thus, you have a wide degree of control over the amount of information displayed on each page of the network diagram.

Another option that is available in graphics mode to control the appearance of your network diagrams is the specification of a PATTERN variable in the ACTNET statement. If the variable is named _PATTERN, you do not need to use the PATTERN= option; the procedure looks for such a variable by default. You can use this variable to specify the PATTERN definition that is to be used for filling each node of the network. Note that if the value of the _PATTERN variable is j for a particular node, PROC NETDRAW uses the specifications in the j th generated PATTERN definition, not the specifications in the PATTERN j statement.

The patterns that can be used with PROC NETDRAW are any of the patterns that can be used for drawing bars (not ones that are used for drawing maps). However, for the text to be visible, you may want to restrict the patterns used to be empty and change only the color of the pattern. You can also use solid fills with a light color and specify the COUTLINE= and CCRITOUT= options to mark noncritical and critical nodes with different colors for the outline.

See *SAS/GRAPH Software: Reference* for details about creating, canceling, reviewing, and altering PATTERN definitions. For a brief description of the PATTERN statement and for a list of available patterns, see [Chapter 6, “The GANTT Procedure.”](#)

If a PATTERN variable is not specified, the procedure uses the values of the E_FINISH and L_FINISH variables (if these variables exist in the [Network](#) data set) to determine if activities in the project are normal, critical, or supercritical. The procedure then uses the first *generated* PATTERN *definition* to fill the nodes corresponding to noncritical activities, the second *generated* PATTERN *definition* for nodes corresponding to critical activities, and the third *generated* PATTERN *definition* for nodes corresponding to supercritical activities.

For zoned network diagrams, if there is no PATTERN variable, the ZONEPAT option enables you to color the nodes based on the values of the ZONE= variable.

Using the Annotate Facility

The Annotate facility enables you to enhance graphics output produced by PROC NETDRAW. To use this facility, you must create an Annotate data set, which contains a set of graphics commands that can be superimposed on the network diagram. This data set has a specific format and must contain key variables as described in *SAS/GRAPH Software: Reference*. The chapter entitled “The Annotate Data Set” lists the variables that are required in this data set and explains the coordinate systems used by the Annotate facility. The present section explains the use of data coordinates specifically with reference to the NETDRAW procedure.

When annotating a graph produced by any of the graphics procedures, it is helpful to use data coordinates that refer to the data values corresponding to the graph that is being annotated. For example, if you want to label a particular node of a network diagram with additional text, you can position the text accurately if you use data coordinates instead of screen coordinates. With respect to PROC NETDRAW, the Annotate facility uses the _X_ and _Y_ values in the Layout data set as the basis for the data coordinate system. To use this feature, you can invoke PROC NETDRAW (with the NODISPLAY option, if necessary) for the given network to produce the Layout data set that contains the _X_ and _Y_ coordinates for each node of the network. This data set can then be used to create the required Annotate data set containing the graphics commands positioning the primitives appropriately on the diagram using the data coordinates. See [Example 7.16](#) on page 708 and [Example 7.17](#) on page 711 for illustrations of this feature.

Note: The data coordinate system enables you to annotate the graph even if it spans multiple pages. However, each annotation must be entirely contained within a given page. For example, you cannot annotate a line on the network diagram that runs from one page of the diagram to another.

Web-Enabled Network Diagrams

The **WEB** variable enables you to define a HTML reference for each activity. This HTML reference is associated with the node corresponding to the activity. The **WEB** variable is a character variable and the values need to be of the form “**HREF=htmlpage**”.

In addition, you can also store the coordinate and link information defined by the **WEB=** option in a SAS data set by specifying the **IMAGEMAP=** option in the **PROC NETDRAW** statement. By processing this SAS data set using a **DATA** step, you can generate customized HTML pages for your network diagram.

Macro Variable **_ORNETDR**

The **NETDRAW** procedure defines a macro variable named **_ORNETDR**. This variable contains a character string that indicates the status of the procedure. It is set at procedure termination. The form of the **_ORNETDR** character string is **STATUS= REASON=**, where **STATUS=** is either **SUCCESSFUL** or **ERROR_EXIT** and **REASON=** (if **PROC NETDRAW** terminated unsuccessfully) can be one of the following:

CYCLE

BADDATA_ERROR

MEMORY_ERROR

IO_ERROR

SEMANTIC_ERROR

SYNTAX_ERROR

NETDRAW_BUG

UNKNOWN_ERROR

This information can be used when **PROC NETDRAW** is one step in a larger program that needs to determine whether the procedure terminated successfully or not. Because **_ORNETDR** is a standard SAS macro variable, it can be used in the ways that all macro variables can be used.

In addition to the “**STATUS= REASON=**” string indicating the status of the procedure, the macro variable **_ORNETDR** also provides some information about the network diagram produced by the current invocation of **PROC NETDRAW**.

The information given in **_ORNETDR** is described in the following list along with the keyword identifying it. It should be noted that these values refer to those actually used in producing the network diagram and are not necessarily the same as those specified in the invocation of the procedure.

- HPAGES= The number of horizontal pages
- VPAGES= The number of vertical pages
- SEGNAME= The name of the first network diagram segment in graphics mode

Note: Some of the information may be redundant or predictable in certain display modes. For example, the value of the SEGNAME= option is empty in line-printer and full-screen modes. The values of the HPAGES= and VPAGES= options are equal to 1 in full-screen mode.

Computer Resource Requirements

There is no inherent limit on the size of the network that can be drawn with the NETDRAW procedure. Naturally, a sufficient amount of core memory must be available in order to invoke and initialize the SAS system. Furthermore, the amount of memory required depends on the mode of invocation of the procedure. As far as possible, the procedure attempts to store all the data in core memory. However, if the problem is too large to fit in core memory, the procedure resorts to the use of utility data sets and swaps between core memory and utility data sets as necessary.

The storage requirement for the data area required by the procedure is proportional to the number of nodes and arcs in the network. The memory required is further increased by the use of the **DP** option in the **ACTNET** statement. Recall that this option requests the use of a dynamic programming algorithm to route the arcs between the nodes, and such algorithms tend to grow exponentially with the size of the problem being solved.

Examples

This section contains 18 examples that illustrate several features of the NETDRAW procedure. Most of the examples use the data from the Widget Manufacturing Project described in [Chapter 2, “The CPM Procedure.”](#) Two tables, [Table 7.18](#) and [Table 7.19](#), at the end of this section list all the examples in this chapter and the options and statements in the NETDRAW procedure that are illustrated by each example.

Example 7.1. Line-Printer Network Diagram

This example uses the data set WIDGET that was used in [Example 2.2](#) in [Chapter 2, “The CPM Procedure,”](#) to illustrate the Activity-on-Node representation of the project. The following program invokes PROC NETDRAW twice. First, the Activity data set WIDGET is used as input to the procedure. The activity and successor information is identified using the ACTIVITY= and SUCCESSOR= options in the ACTNET statement. The LINEPRINTER option is specified, producing the line-printer network diagram shown in [Output 7.1.1](#).

```
/* Activity-on-Node representation of the project */
data widget;
  format task $12. succ1-succ3 $12.;
```

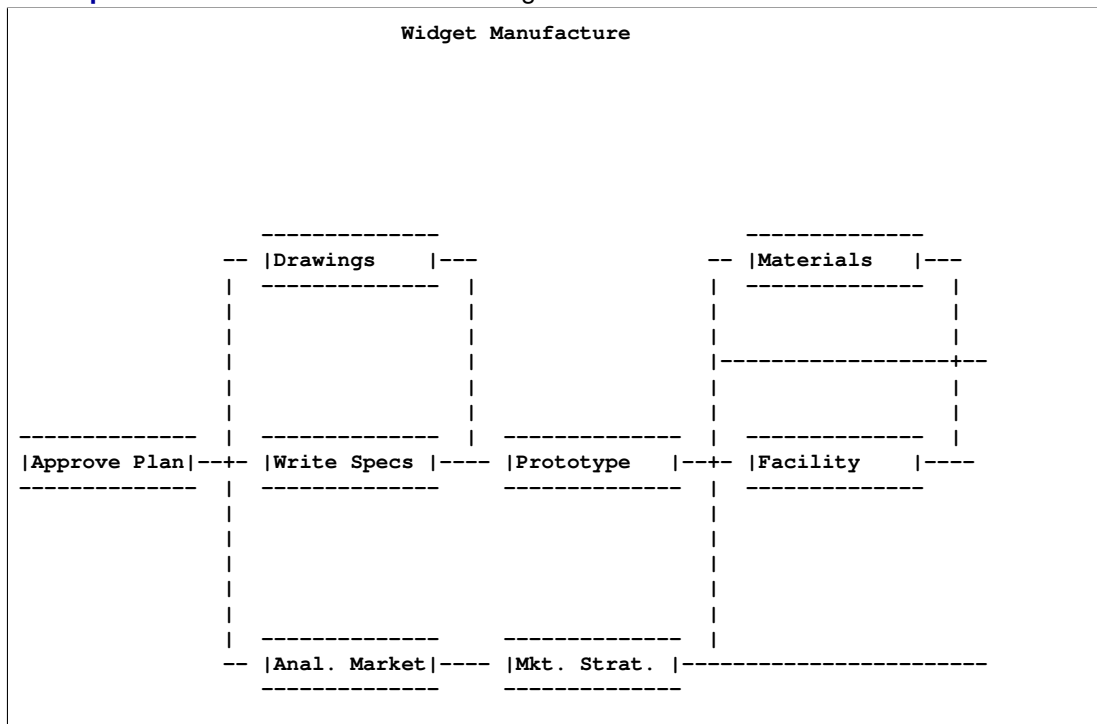
```

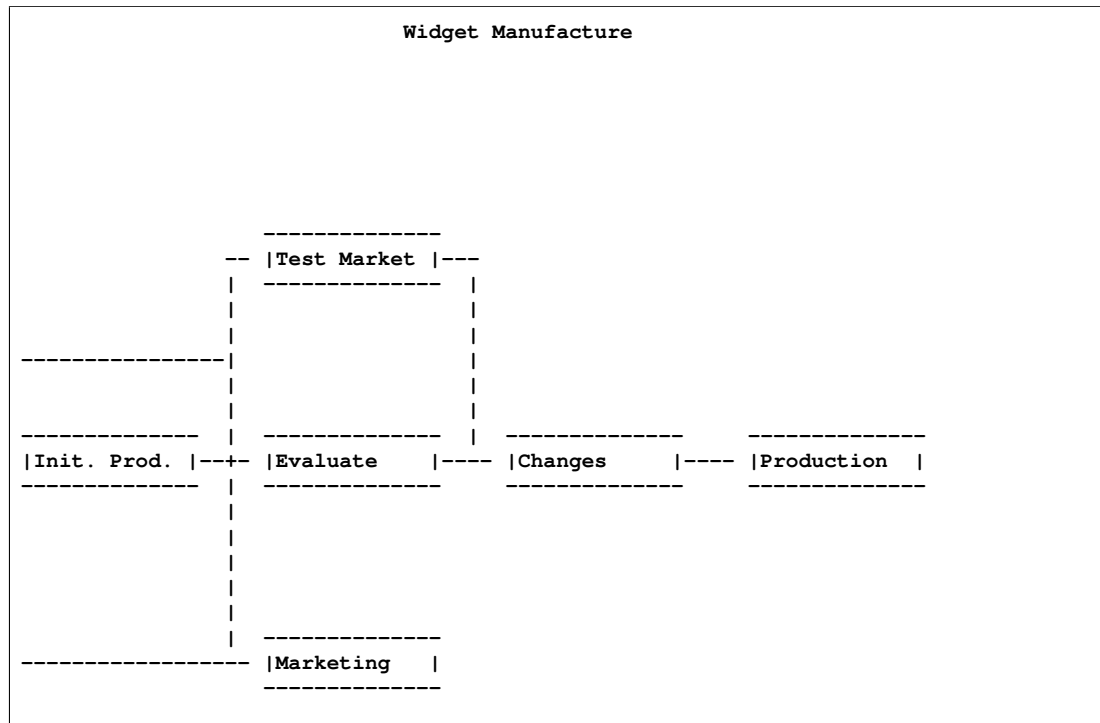
        input task & days succ1 & succ2 & succ3 & ;
        datalines;
Approve Plan   5 Drawings      Anal. Market  Write Specs
Drawings      10 Prototype     .            .
Anal. Market   5 Mkt. Strat.  .            .
Write Specs     5 Prototype     .            .
Prototype     15 Materials    Facility      .
Mkt. Strat.   10 Test Market  Marketing     .
Materials     10 Init. Prod.  .            .
Facility      10 Init. Prod.  .            .
Init. Prod.   10 Test Market  Marketing     Evaluate
Evaluate     10 Changes      .            .
Test Market   15 Changes      .            .
Changes       5 Production   .            .
Production    0 .            .            .
Marketing     0 .            .            .
;

title 'Widget Manufacture';
options ps=32 ls=78;
proc netdraw data=widget lineprinter;
    actnet / activity=task successor=(succ1 succ2 succ3);
run;

```

Output 7.1.1. Line-Printer Network Diagram





Next, PROC CPM is invoked to schedule the project, and the resulting Schedule data set is used as input to the NETDRAW procedure. In addition to the ACTIVITY= and SUCCESSOR= options, the DURATION= option is used in the ACTNET statement. The DURATION= option adds the values of the DURATION variable within each node of the network. The procedure also displays the values of the E_START, E_FINISH, L_START, L_FINISH, T_FLOAT, and F_FLOAT variables within each node. The network is displayed in [Output 7.1.2](#).

```

proc cpm data=widget out=sched
    date='1dec03'd;
    activity task;
    successor succ1 succ2 succ3;
    duration days;
run;

options ps=45 ls=90;
title2 'Schedule Information';
proc netdraw data=sched lineprinter;
    actnet / activity=task
            successor=(succ1 succ2 succ3)
            duration = days;
run;

```

Output 7.1.2. Project Schedule

Widget Manufacture Schedule Information					

|Drawings		Dur:10|			
|ES:06DEC03	EF:15DEC03|	-----			
|LS:06DEC03	LF:15DEC03|				
|TF: 0	FF: 0	|			

|Approve Plan		Dur: 5|		|Write Specs	
|ES:01DEC03	EF:05DEC03|	|ES:06DEC03	EF:10DEC03|	|Prototype	
|LS:01DEC03	LF:05DEC03|	|LS:11DEC03	LF:15DEC03|	|ES:16DEC03	EF:30DEC03|
|TF: 0	FF: 0	|TF: 5	FF: 5	|LS:16DEC03	LF:30DEC03|
				|TF: 0	FF: 0

|Anal. Market		Dur: 5|		|Mkt. Strat.	
|ES:06DEC03	EF:10DEC03|	-----		|ES:11DEC03	EF:20DEC03|
|LS:05JAN04	LF:09JAN04|			|LS:10JAN04	LF:19JAN04|
|TF:30	FF: 0	|		|TF:30	FF:30

Widget Manufacture
Schedule Information

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: right;">Materials</td><td style="text-align: center;">Dur:10</td><td style="border-right: 1px dashed black;"></td></tr> <tr><td>ES:31DEC03</td><td>EF:09JAN04</td><td style="border-right: 1px dashed black;">---</td></tr> <tr><td>LS:31DEC03</td><td>LF:09JAN04</td><td style="border-right: 1px dashed black;"> </td></tr> <tr><td>TF: 0</td><td>FF: 0</td><td style="border-right: 1px dashed black;"> </td></tr> </table>	Materials	Dur:10		ES:31DEC03	EF:09JAN04	---	LS:31DEC03	LF:09JAN04		TF: 0	FF: 0			<table style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: right;">Test Market</td><td style="text-align: center;">Dur:15</td><td style="border-right: 1px dashed black;"></td></tr> <tr><td>ES:20JAN04</td><td>EF:03FEB04</td><td style="border-right: 1px dashed black;">---</td></tr> <tr><td>LS:20JAN04</td><td>LF:03FEB04</td><td style="border-right: 1px dashed black;"> </td></tr> <tr><td>TF: 0</td><td>FF: 0</td><td style="border-right: 1px dashed black;"> </td></tr> </table>	Test Market	Dur:15		ES:20JAN04	EF:03FEB04	---	LS:20JAN04	LF:03FEB04		TF: 0	FF: 0													
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Widget Manufacture
Schedule Information

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LS:09FEB04	LF:09FEB04																								
TF: 0	FF: 0																								

Example 7.2. Graphics Version of PROC NETDRAW

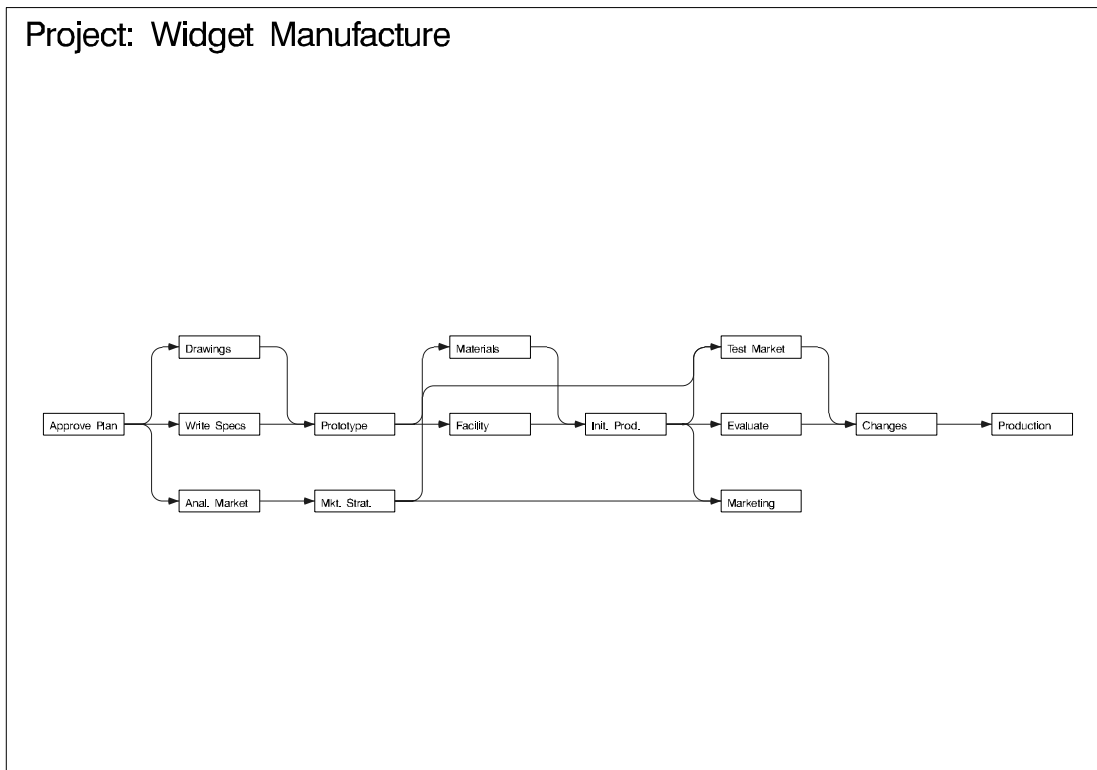
The same network used in [Example 7.1](#) is drawn here with the GRAPHICS option (which is also the default mode of output for the NETDRAW procedure). In this example, the network is drawn before scheduling the project with PROC CPM. The global options HPOS= and VPOS= are set to 100 and 70, respectively. These options control the number of character cell positions on the screen. The network is displayed in [Output 7.2.1](#). Note that all the nodes are the same color as specified by the PATTERN statement, the color of the arcs is blue as specified by the CARCS= option, the width of all lines is 3 as specified by the LWIDTH= option, and the font used for the text is SWISS as specified by the FONT= option.

```

options hpos=100 vpos=70 border;
pattern1 c=green v=e;
title h=3 j=1 f=swiss ' Project: Widget Manufacture';
proc netdraw data=widget graphics;
  actnet / act=task
        succ=(succ1 succ2 succ3)
        carcs=blue
        font=swiss;
run;

```

Output 7.2.1. Project Network



Example 7.3. Spanning Multiple Pages

In this example, the Schedule data set produced by PROC CPM is displayed in a graphics network. As in the second part of [Example 7.1](#), the procedure displays the

duration as well as the early and late start and finish times and the total float and free float of each activity in the node corresponding to that activity. The network cannot fit on one page and is drawn across three pages, as shown in [Output 7.3.1](#).

This example also illustrates several options for controlling the appearance of the network diagram. The pattern statements set a background fill color for all the nodes of the network (PATTERN1 and PATTERN2). The COUTLINE= and CCRITOUT= options set the outline colors for noncritical and critical activities, respectively. Recall that the procedure uses the values of the E_FINISH and L_FINISH variables to determine if an activity is critical. The CARCS= and CCRITARCS= options color the regular arcs blue and the critical arcs (arcs connecting critical activities) red, respectively. The CTEXT= option sets the color of the text to blue, while the FONT= option uses the Swiss font for all text. Finally, the LWIDTH= option sets the default width for all the lines in the network, and the LWCRIT= option further highlights the critical arcs by drawing them with thicker lines.

In this invocation of PROC NETDRAW, the SEPARATEARCS option is used so that the two parallel arcs leading into the activity ‘Test Market’ (one from ‘Mkt.Strat.’ and the other from ‘Init. Prod.’) are drawn along separate tracks instead of along a single track as in [Example 7.2](#).

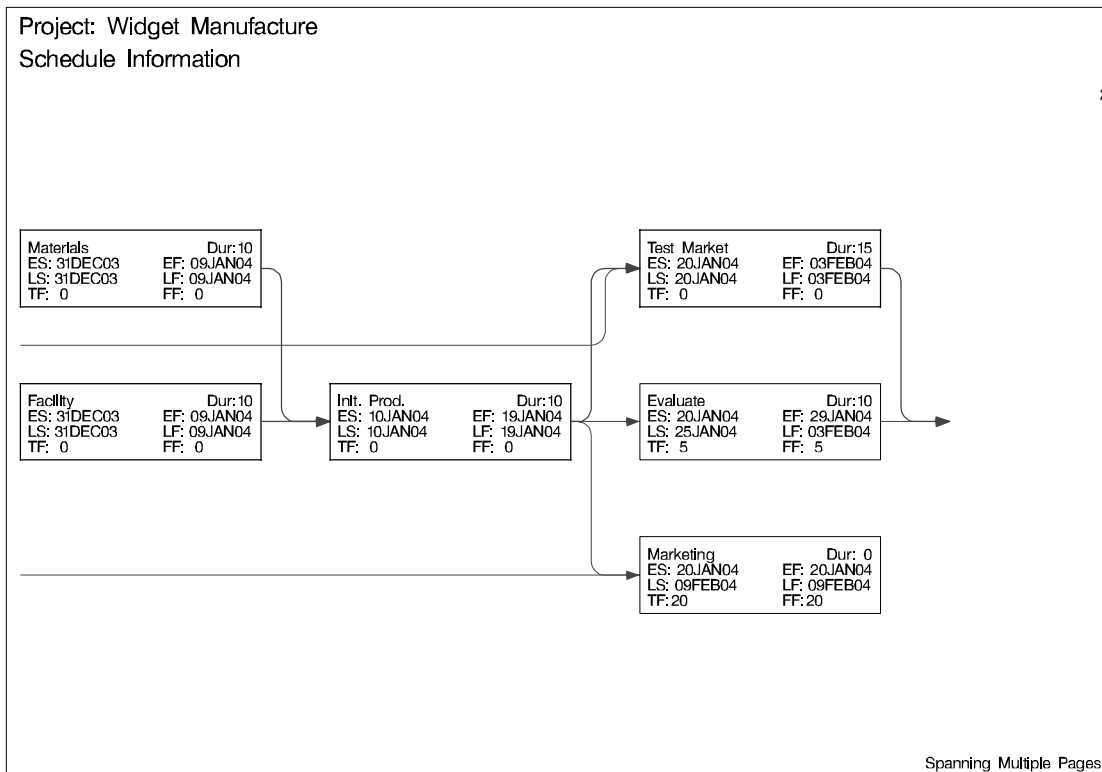
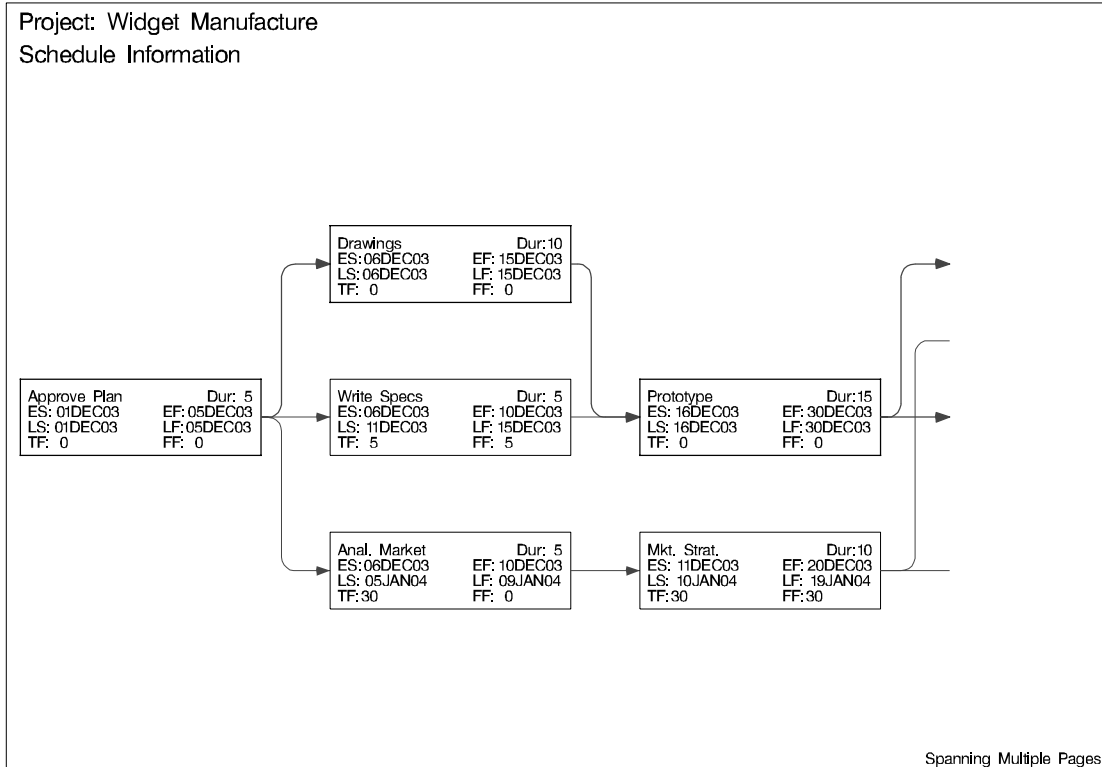
```

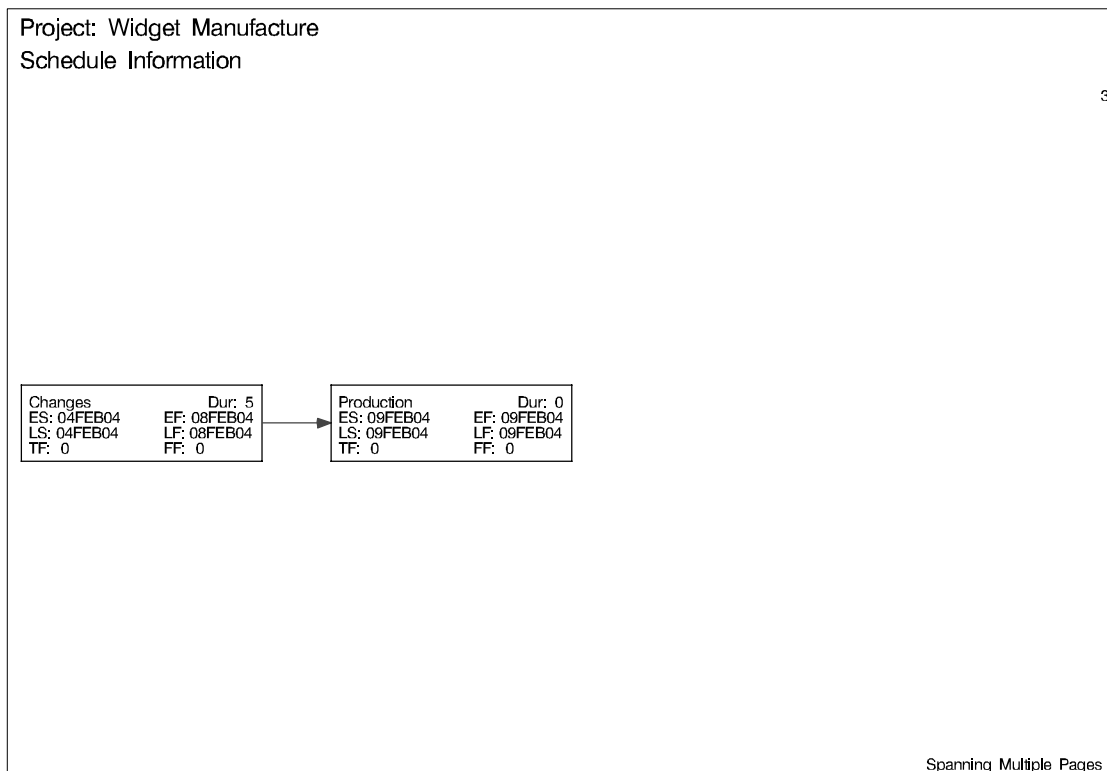
options hpos=80 vpos=50 border;
pattern1 c=ltgray v=s;
pattern2 c=ltgray v=s;

title c=blue j=1 f=swiss h=1.5
                                ' Project: Widget Manufacture';
title2 c=blue f=swiss j=1 h=1.5 ' Schedule Information';
footnote c=blue f=swiss j=r 'Spanning Multiple Pages ';
proc netdraw data=sched graphics;
  actnet / act=task
          succ=(succ1 succ2 succ3)
          dur = days
          coutline=blue
          ccritout=red
          carcs=blue
          ccritarcs=red
          ctext=blue
          lwidth=1
          lwcrit=2
          separatearcs
          font=swiss;
run;

```

Output 7.3.1. Project Schedule





Example 7.4. The COMPRESS and PCOMPRESS Options

In [Example 7.2](#), the number of character cell positions were specified so that the entire network fit on one page; in [Example 7.3](#), the network spanned several pages. To force the network diagram to fit on one page automatically, you can use the COMPRESS or PCOMPRESS options. Both options use window transformations to fit the network on one page: the COMPRESS option treats the horizontal and vertical transformations independently of each other so that one direction may not be as compressed as the other; the PCOMPRESS option uses a proportional transformation so that each direction is compressed as much as the other. The following two invocations of PROC NETDRAW illustrate the differences in the diagrams produced.

In both network diagrams, PATTERN statements are used to color the nodes red or green, depending on whether the activities they represent are critical or not. The first PATTERN statement is for nodes corresponding to noncritical activities, and the second statement is for critical activities. The second invocation of PROC NETDRAW also uses the NOVCENTER option in the ACTNET statement to turn off centering in the vertical direction, so that the network is drawn immediately below the titles.

```

goptions hpos=100 vpos=65 border;

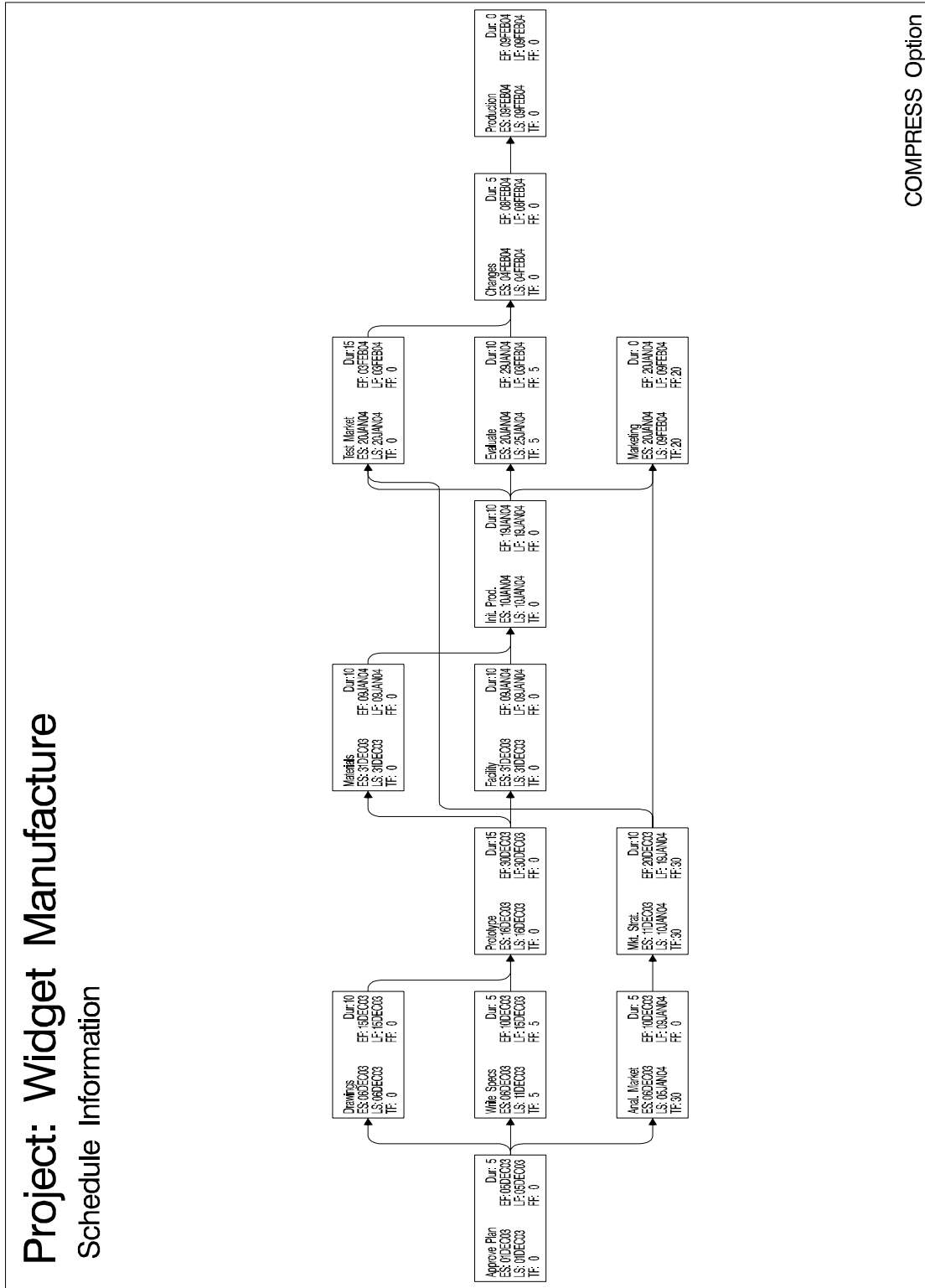
title j=1 f=swiss h=3 ' Project: Widget Manufacture';
title2 j=1 f=swiss h=2 ' Schedule Information';
footnote f=swiss j=r h=1.5 'COMPRESS Option ';
proc netdraw data=sched graphics;
    actnet / act=task
        succ=(succ1 succ2 succ3)

```

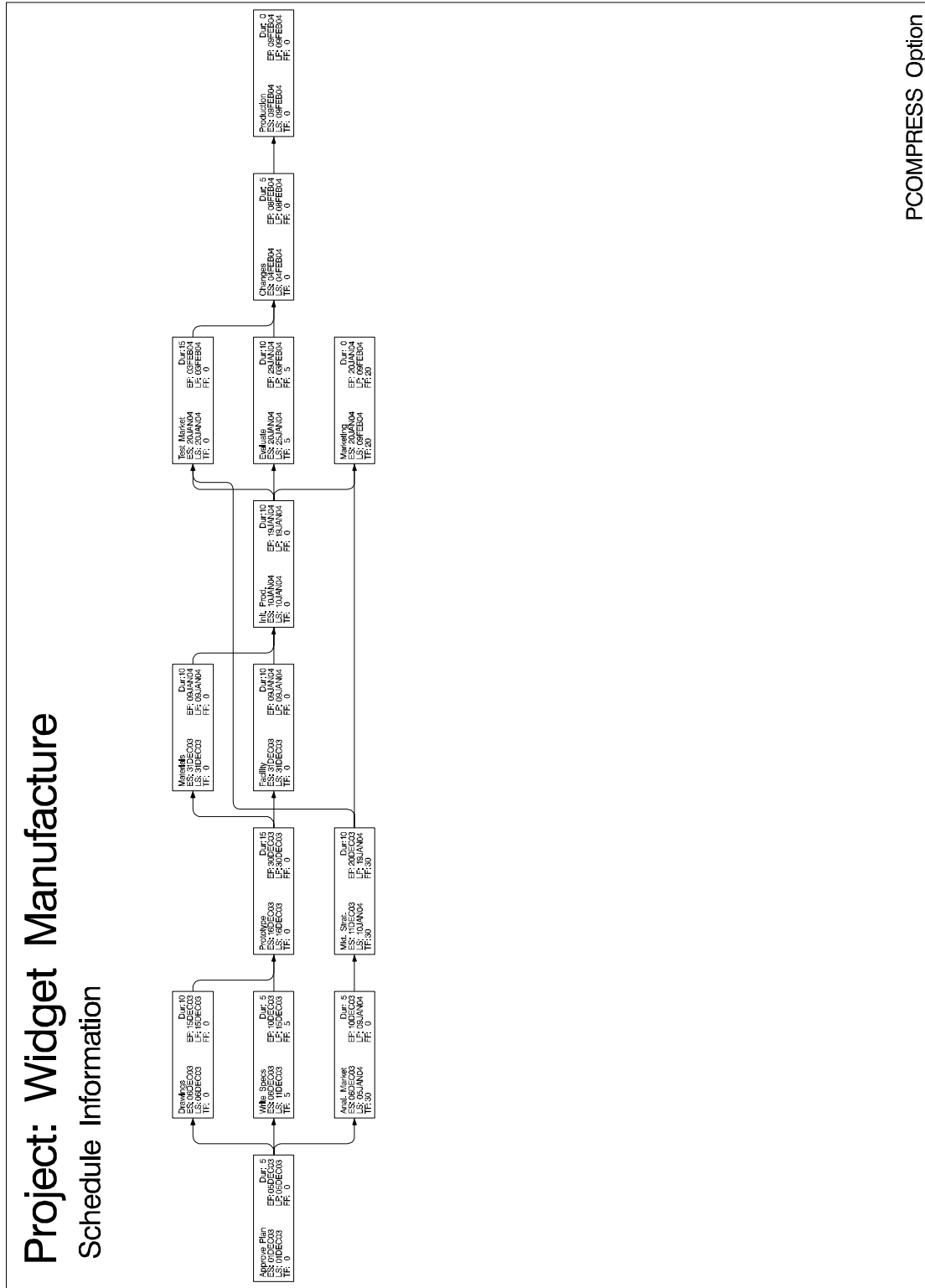
```
        dur = days
        carcs=blue cccritarcs=red
        font=swiss
        separatearcs
        compress;
run;

footnote f=swiss j=r h=1.5 'PCOMPRESS Option ';
proc netdraw data=sched graphics;
  actnet / act=task
    succ=(succ1 succ2 succ3)
    dur = days
    carcs=blue cccritarcs=red
    font=swiss
    separatearcs
    pcompress
    novcenter;
run;
```

Output 7.4.1. Project Network: COMPRESS Option



Output 7.4.2. Project Network: PCOMPRESS Option



Example 7.5. Controlling the Display Format

In addition to the COMPRESS and PCOMPRESS options and the HPOS= and VPOS= global options, you can control the amount of information displayed on a single page by

- turning off the default ID variable selection (using the NODEFID option) and using the ID= option to select only a few variables of interest in the Network data set
- setting the dimensions of each node using the BOXWIDTH= and the BOXHT= options
- specifying the horizontal and vertical distances between nodes using the XBETWEEN= and YBETWEEN= options, respectively

This example uses the data from [Example 6.1](#) in [Chapter 6](#), “The GANTT Procedure,” and some of the options just mentioned to produce the network diagram shown in [Output 7.5.1](#). The ID= and NODEFID options are used to display only the activity name and duration values within each node. The NOLABEL option suppresses the display of the variable names within each node. Some of the activity names are truncated by the BOXWIDTH= option. Even with the restrictions imposed, the network is too large to fit on one page and spans two pages. Note that on devices with higher resolution, you can increase the values of HPOS and VPOS (still maintaining readability) to enable more of the network to be drawn on one page.

```

data ex ;
  format activity $20. success1 $20. success2 $20.
           success3 $20. success4 $20.;
  input activity dur success1-success4;
  datalines;
form          4 pour . . .
pour          2 core . . .
core          14 strip spray_fireproof insulate_walls .
strip         2 plumbing curtain_wall risers doors
strip         2 electrical_walls balance_elevator . .
curtain_wall  5 glaze_sash . . .
glaze_sash    5 spray_fireproof insulate_walls . .
spray_fireproof 5 ceil_ducts_fixture . . .
ceil_ducts_fixture 5 test . . .
plumbing      10 test . . .
test          3 insulate_mechanical . . .
insulate_mechanical 3 lath . . .
insulate_walls 5 lath . . .
risers        10 ceil_ducts_fixture . . .
doors         1 port_masonry . . .
port_masonry  2 lath finish_masonry . .
electrical_walls 16 lath . . .
balance_elevator 3 finish_masonry . . .
finish_masonry 3 plaster_marble_work . .
lath          3 plaster_marble_work . .

```

```

plaster          5 floor_finish tiling acoustic_tiles .
marble_work      3 acoustic_tiles . . .
acoustic_tiles   5 paint finish_mechanical . .
tiling           3 paint finish_mechanical . .
floor_finish     5 paint finish_mechanical . .
paint            5 finish_paint . . .
finish_mechanical 5 finish_paint . . .
finish_paint     2 caulking_cleanup . . .
caulking_cleanup 4 finished . . .
finished         0 . . . .
;

proc cpm finishbefore date='1jan04'd out=sched;
  activity activity;
  duration dur;
  successors success1-success4;
run;

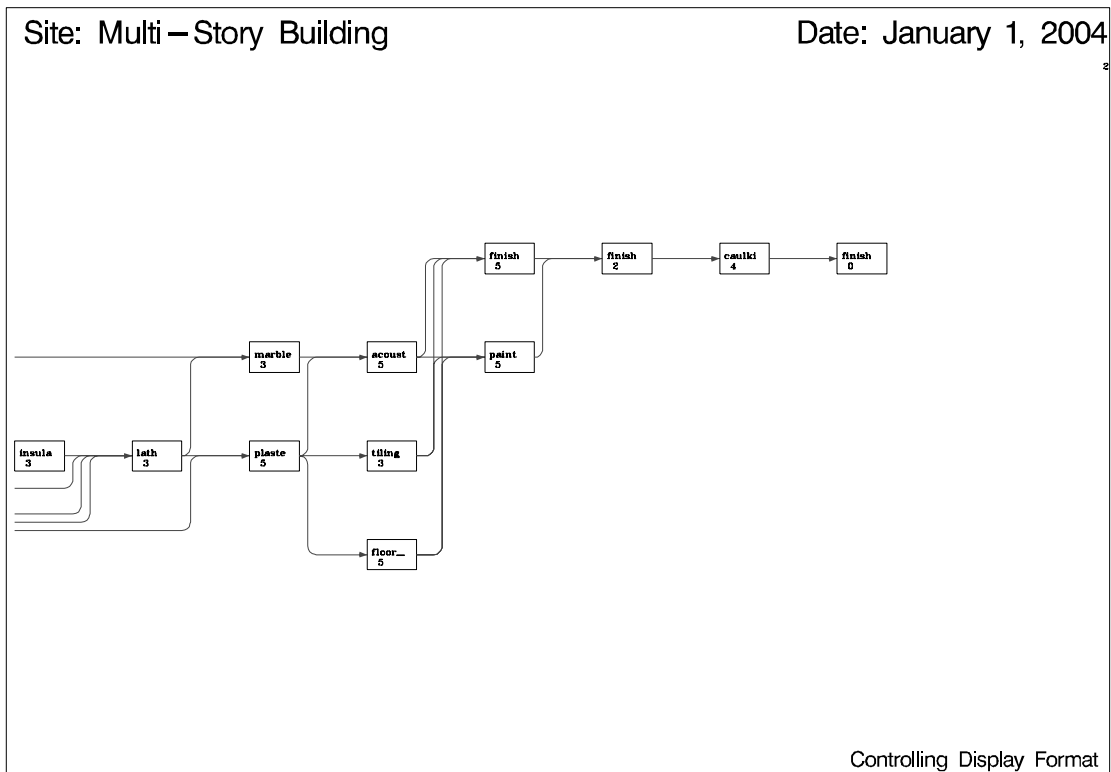
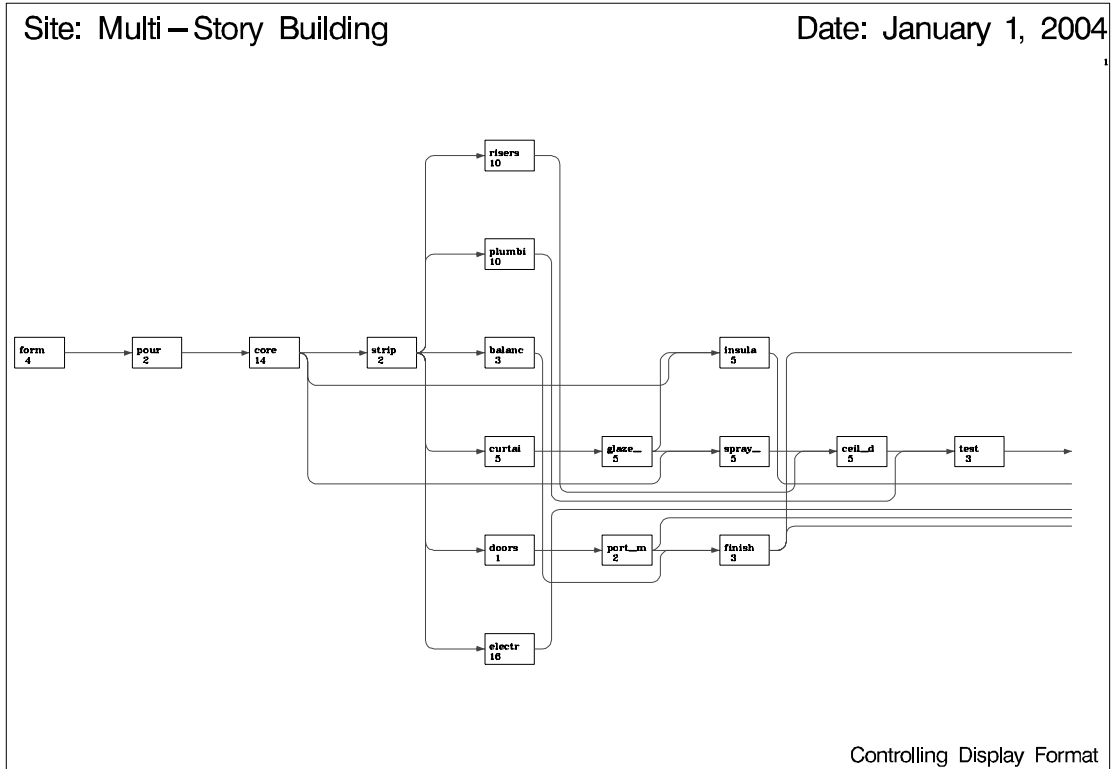
proc sort;
  by e_start;
run;

goptions hpos=130 vpos=75 border;

title f=swiss j=1 h=3 ' Site: Multi-Story Building'
      j=r ' Date: January 1, 2004';
footnote f=swiss j=r h=2 'Controlling Display Format ';
proc netdraw data=sched graphics;
  actnet / act = activity
          succ = (success1-success4)
          font=triplex
          id = ( activity dur )
          nolabel nodefaultid
          boxwidth = 6
          ybetween = 6
          separatearcs;
run;

```

Output 7.5.1. Controlling the Display Format



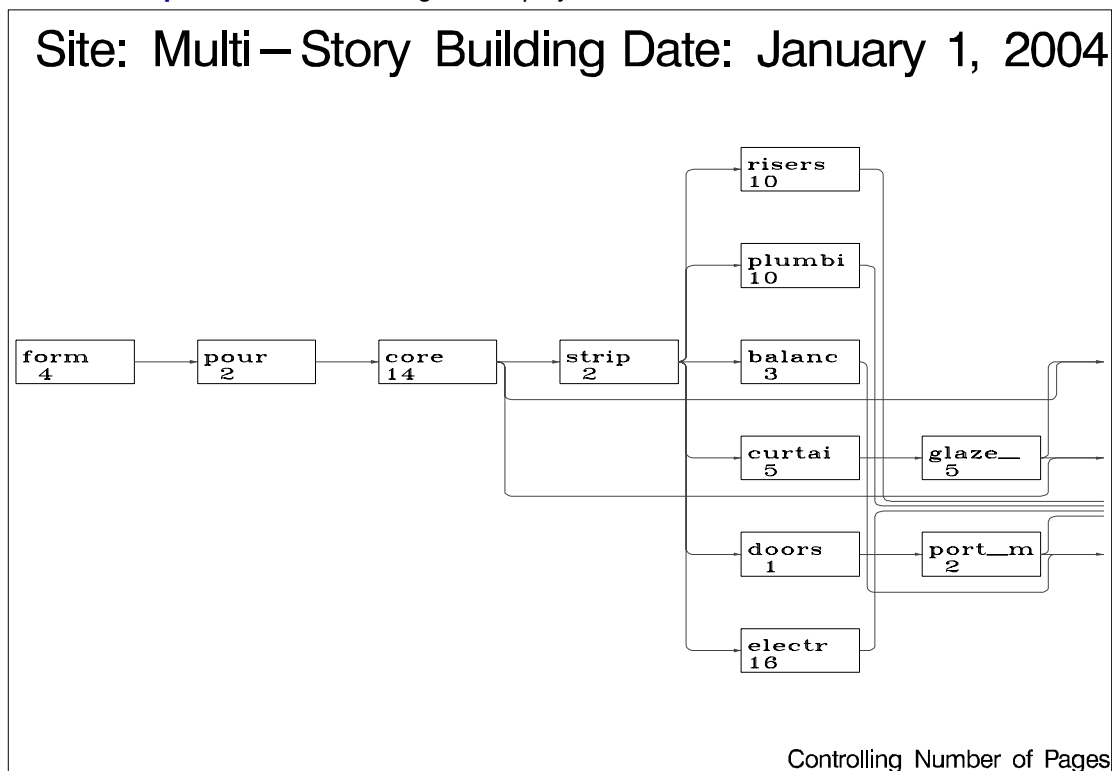
You can also control the format of the display by specifying the number of pages into which the network diagram should be split. You can do this by

- using the HPAGES= and VPAGES= options, which specify the number of pages in the horizontal and vertical directions, respectively
- setting the number of nodes in the horizontal and vertical directions using the NXNODES= and NYNODES= options, respectively

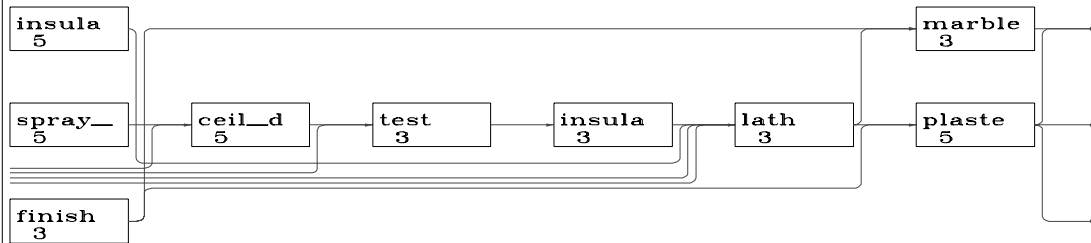
The following statements invoke PROC NETDRAW with some additional page control options. The HTEXT= option is also used to control the height of the text used in the diagram.

```
footnote f=swiss j=r 'Controlling Number of Pages';
proc netdraw data=sched graphics;
  actnet / act = activity
  succ = (success1-success4)
  font=triplex
  id = ( activity dur )
  nodelabel nodefaultid
  boxwidth = 6
  ybetween = 6
  separatearcs
  htext=2
  nopagenumber
  hpages=3 vpages=1;
run;
```

Output 7.5.2. Controlling the Display Format

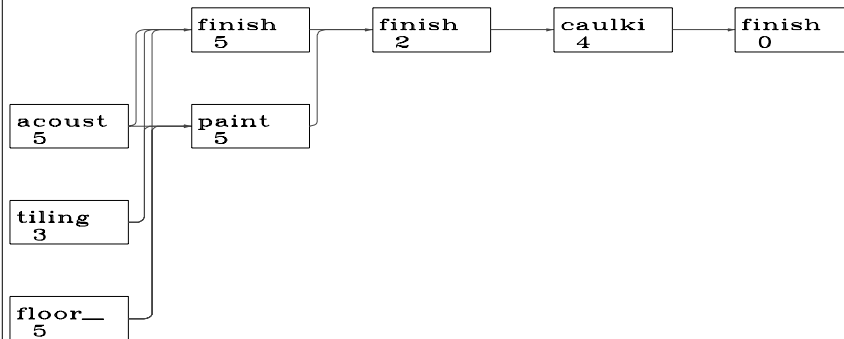


Site: Multi – Story Building Date: January 1, 2004



Controlling Number of Pages

Site: Multi – Story Building Date: January 1, 2004



Controlling Number of Pages

Example 7.6. Nonstandard Precedence Relationships

This example illustrates the use of the LAG= option to indicate nonstandard precedence relationships between activities. Consider the widget manufacturing project described in the earlier examples. Some of the precedence constraints between the activities may be nonstandard or have a nonzero lag value. For example, the activity 'Init. Prod.' may not be able to start until 2 days after the completion of the activity 'Facility.' The Network data set is displayed in [Output 7.6.1](#). The variable lagdur indicates the type of relationship between the activities specified in the variables task and succ.

The following statements invoke PROC NETDRAW with the LAG= option. The resulting network diagram is shown in [Output 7.6.2](#).

```

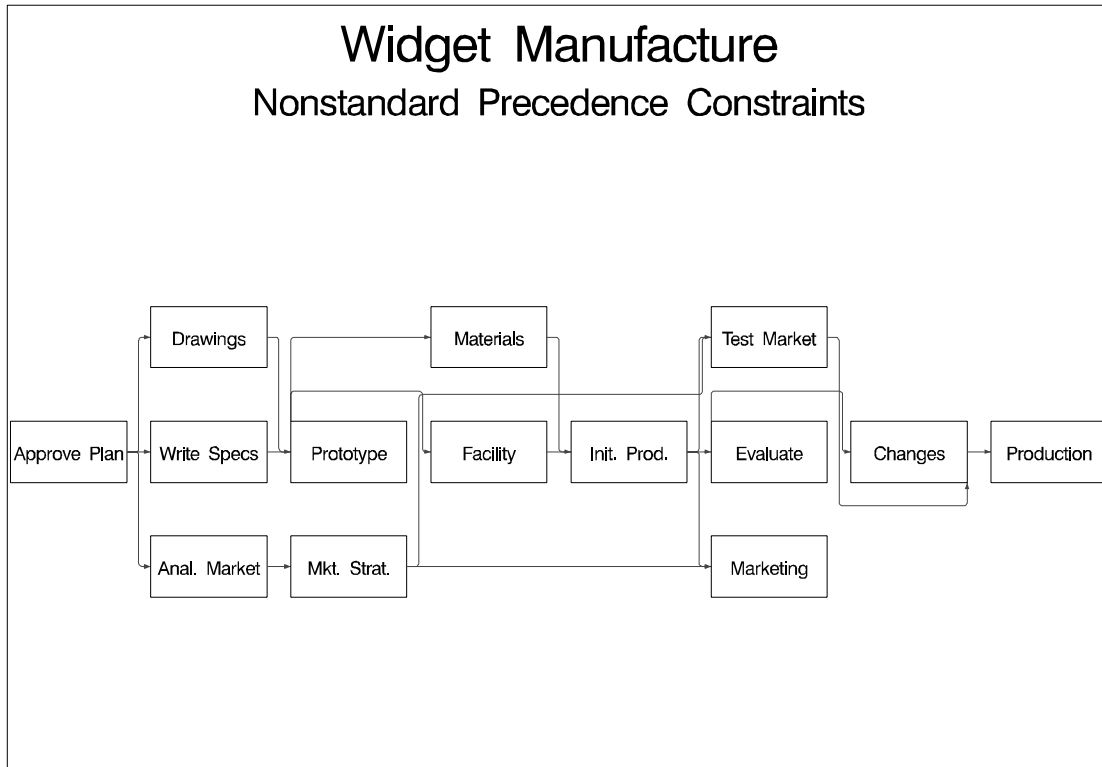
title 'Widget Manufacture';
title2 h=1.5 'Nonstandard Precedence Constraints';
proc netdraw graphics data=widglag;
  actnet / act=task
          succ=succ
          lag=lagdur
          pcompress
          htext=3 boxht=3 arrowhead=2
          xbetween=7 ybetween=9
          centerid
          separatearcs;
run;

```

Output 7.6.1. Network with Nonstandard Precedence Constraints

Widget Manufacture Network Data Set				
Obs	task	days	succ	lagdur
1	Approve Plan	5	Drawings	
2	Approve Plan	5	Anal. Market	
3	Approve Plan	5	Write Specs	
4	Drawings	10	Prototype	
5	Anal. Market	5	Mkt. Strat.	
6	Write Specs	5	Prototype	
7	Prototype	15	Materials	ss_9
8	Prototype	15	Facility	ss_9
9	Mkt. Strat.	10	Test Market	
10	Mkt. Strat.	10	Marketing	
11	Materials	10	Init. Prod.	
12	Facility	10	Init. Prod.	fs_2
13	Init. Prod.	10	Test Market	
14	Init. Prod.	10	Marketing	
15	Init. Prod.	10	Evaluate	
16	Evaluate	10	Changes	ss_6
17	Test Market	15	Changes	ff_3
18	Changes	5	Production	
19	Production	0		
20	Marketing	0		

Output 7.6.2. Network Diagram with Nonstandard Precedence Constraints



Example 7.7. Controlling the Arc-Routing Algorithm

This example illustrates the use of the DP and HTRACKS= options to control the routing of the arcs connecting the nodes. The project is a simple construction project with the following data. A Schedule data set produced by PROC CPM is input to PROC NETDRAW. The first invocation of the procedure illustrates the default layout of the network. As explained in the “Layout of the Network” section on page 643, the NETDRAW procedure uses a simple heuristic to route the arcs between the nodes. In the resulting diagram displayed in Output 7.7.1, note that the specification of BOXHT=3 limits the number of rows within each node so that the float values are not displayed.

```

data exmp1;
  format task $16. succesr1-succesr3 $16. ;
  input task &
        duration
        succesr1 &
        succesr2 &
        succesr3 & ;
  datalines;
Drill Well      4  Pump House      .      .
Pump House     3  Install Pipe   .      .
Power Line     3  Install Pipe   .      .
Excavate       5  Install Pipe   Install Pump Foundation
Deliver Material 2  Assemble Tank .      .
Assemble Tank  4  Erect Tower    .      .
  
```

```

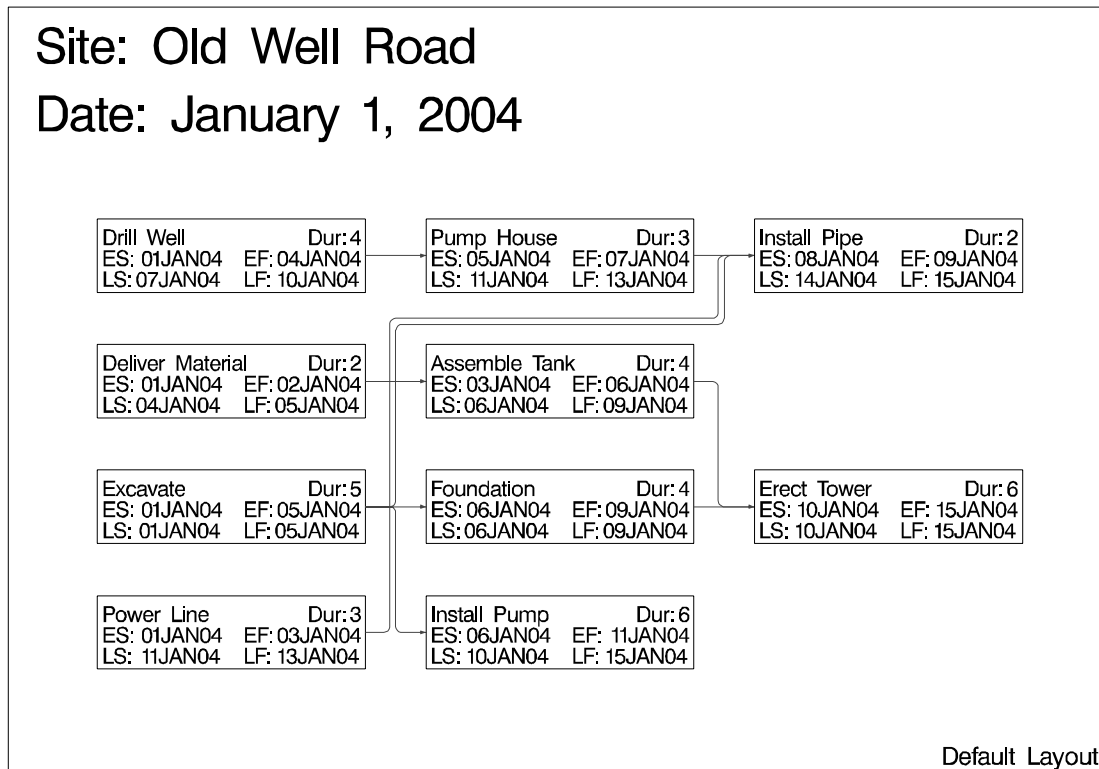
Foundation          4 Erect Tower      .          .
Install Pump        6 .                .          .
Install Pipe        2 .                .          .
Erect Tower         6 .                .          .
;

proc cpm data=exmp1 date='1jan04'd out=sched;
  activity task;
  duration duration;
  successor succesr1 succesr2 succesr3;
run;

title j=1 h=2 ' Site: Old Well Road';
title2 j=1 h=2 ' Date: January 1, 2004';
footnote j=r 'Default Layout ';
proc netdraw data=sched graphics;
  actnet / act = task
        dur = duration
        succ = (succesr1-succesr3)
        boxht = 3 xbetween = 10
        separatearcs
        htext=2
        pcompress;
run;

```

Output 7.7.1. Arc Routing: Default Layout



Next, a different routing of the arcs is obtained by specifying the DP and the HTRACKS= options. As a result of these options, the NETDRAW procedure uses a

dynamic programming algorithm to route the arcs, limiting the number of horizontal tracks used to 1. The resulting network diagram is shown in [Output 7.7.2](#). Notice that at most one arc is drawn in each horizontal track. Recall that, by default, the procedure uses a dynamic programming algorithm for arc routing if the number of tracks is restricted to be less than the maximum number of successors. Thus, for this example, the default routing option will be DP, even if it is not explicitly specified (because HTRACKS = 1 and the maximum number of successors is 3).

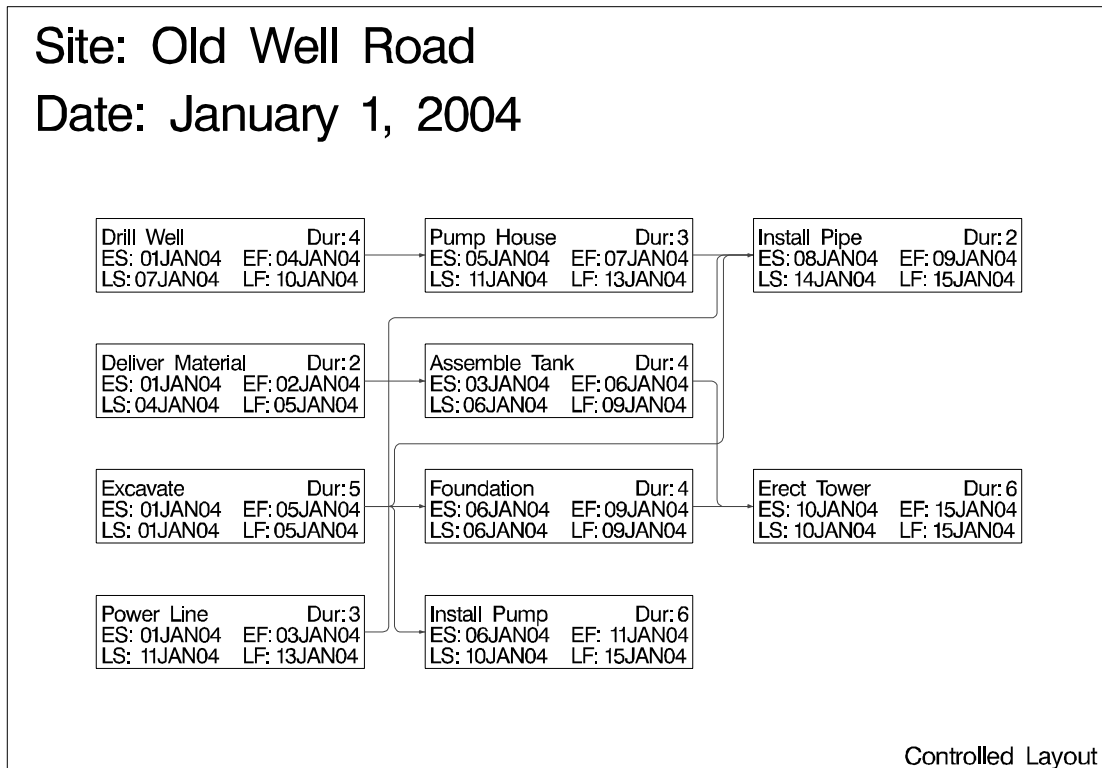
```

footnote j=r h=1 'Controlled Layout ' ;
proc netdraw data=sched graphics;
  actnet / act = task
  dur = duration
  succ = (succesr1-succesr3)
  boxht = 3 xbetween = 10
  separatearcs
  htracks=1
  htext=2
  pcompress
  dp;

run;

```

Output 7.7.2. Arc Routing: Controlled Layout



Example 7.8. PATTERN and SHOWSTATUS Options

As a project progresses, in addition to the criticality of the activities, you may also want to display the status of the activity: whether it is in progress, has been completed, or is still to be scheduled. The SHOWSTATUS option in the ACTNET statement displays this additional information. In the current example, the same progress data as shown in [Example 2.13](#) in [Chapter 2](#), “[The CPM Procedure](#),” are used to illustrate the SHOWSTATUS option. The following program shows the necessary code. First, PROC CPM schedules the project with the SHOWFLOAT option; this enables activities that are already in progress or completed also to show nonzero float. Following this, a DATA step sets the variable `style` to ‘3’ for activities that are completed or in progress; the remaining activities have missing values for this variable.

PROC NETDRAW is then invoked with the SHOWSTATUS option, which draws two diagonal lines across nodes referring to completed activities and one diagonal line for in-progress activities. The PATTERN= option in the ACTNET statement identifies the variable `style` containing the pattern information. Thus, the third pattern statement is used for in-progress or completed activities; the other activities (which have missing values for the variable `style`) use the second or the first pattern statement according to whether or not they are critical. However, since the first two PATTERN statements have EMPTY fill patterns specified, the nodes representing activities that have not yet started are in fact colored on the basis of the COUTLINE= and CCRITOUT= options. The resulting network diagram is shown in [Output 7.8.1](#).

```

data holidays;
  format holiday holifin date7.;
  input holiday & date7. holifin & date7. holiday;
  datalines;
24dec03 26dec03 4
01jan04 . .
;

* actual schedule at timenow = 19dec03;
data actual;
  format task $12. sdate fdate date7.;
  input task & sdate & date7. fdate & date7. pctc rdur;
  datalines;
Approve Plan 01dec03 05dec03 . .
Drawings      06dec03 16dec03 . .
Anal. Market  05dec03 . 100 .
Write Specs    07dec03 12dec03 . .
Prototype     . . . .
Mkt. Strat.   10dec03 . . 3
Materials     . . . .
Facility      . . . .
Init. Prod.   . . . .
Evaluate      . . . .
Test Market   . . . .
Changes       . . . .
Production    . . . .
Marketing     . . . .

```

```

;
* merge the predicted information with network data;
data widgact;
  merge actual widget;
  run;

* estimate schedule based on actual data;
proc cpm data=widgact holidata=holidays
  out=widgupd date='1dec03'd;
  activity task;
  succ succ1 succ2 succ3;
  duration days;
  holiday holiday / holifin=(holifin);
  actual / as=sdate af=fdate timenow='19dec03'd
  remdur=rdur pctcomp=pctc showfloat;
  run;

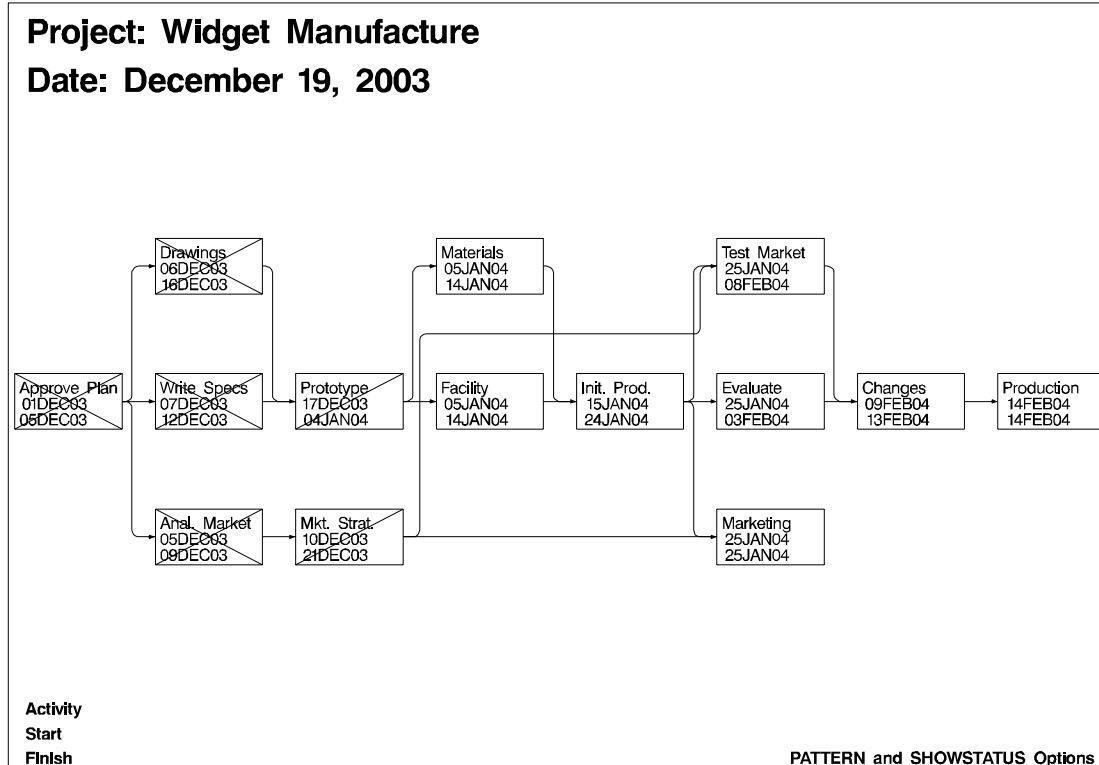
/* Set patterns for activities that have started */
data netin;
  set widgupd;
  if a_start ^= . then style = 3;
  run;

goptions hpos=120 vpos=70 border;
pattern1 c=green v=e;
pattern2 c=red v=e;
pattern3 c=ltgray v=s;

title j=1 f=swissb h=3 ' Project: Widget Manufacture';
title2 j=1 f=swissb h=3 ' Date: December 19, 2003';
footnote1 j=1 f=swissb h=1.5 ' Activity';
footnote2 j=1 f=swissb h=1.5 ' Start';
footnote3 j=1 f=swissb h=1.5 ' Finish'
          j=r f=swissb h=1.5 'PATTERN and SHOWSTATUS Options ' ;
proc netdraw data=netin graphics;
  actnet / act=task
    succ=(succ1 succ2 succ3)
    ybetween = 10
    separatearcs
    pcompress
    font=swiss
    id=(task e_start e_finish)
    nodefid nolabel
    carcs=cyan
    ccritarcs=red
    coutline = green
    ccritout = red
    showstatus
    pattern = style
    htext=2;
  run;

```

Output 7.8.1. PATTERN and SHOWSTATUS Options



Example 7.9. Time-Scaled Network Diagram

This example illustrates the use of the `TIMESCALE` and `ALIGN=` options to draw time-scaled network diagrams. The Schedule data set `WIDGUPD`, produced by `PROC CPM` in the previous example, is used. First, `PROC NETDRAW` is invoked with the `TIMESCALE` option without any `ALIGN=` specification. By default, the procedure aligns the nodes to coincide with the early start times of the activities. The network spans two pages (`HPAGES=2 VPAGES=1`), as shown in [Output 7.9.1](#). The `HMARGIN=` and `VMARGIN=` options add extra space around the margins.

```

title j=1 f=swiss h=2 ' Project: Widget Manufacture';
title2 j=1 f=swiss h=1.5 ' Date: December 19, 2003';
footnote j=1 f=swiss ' Task Name / Early Finish Within Node'
          j=r f=swiss 'Time Scaled: Default Alignment' ;

proc netdraw data=widgupd graphics;
  actnet / act=task
          succ=(succ1 succ2 succ3)
          ybetween = 8
          separatearcs
          novcenter
          font=swiss
          id=(task e_finish)
          nodefid
          nolabel
          showstatus

```



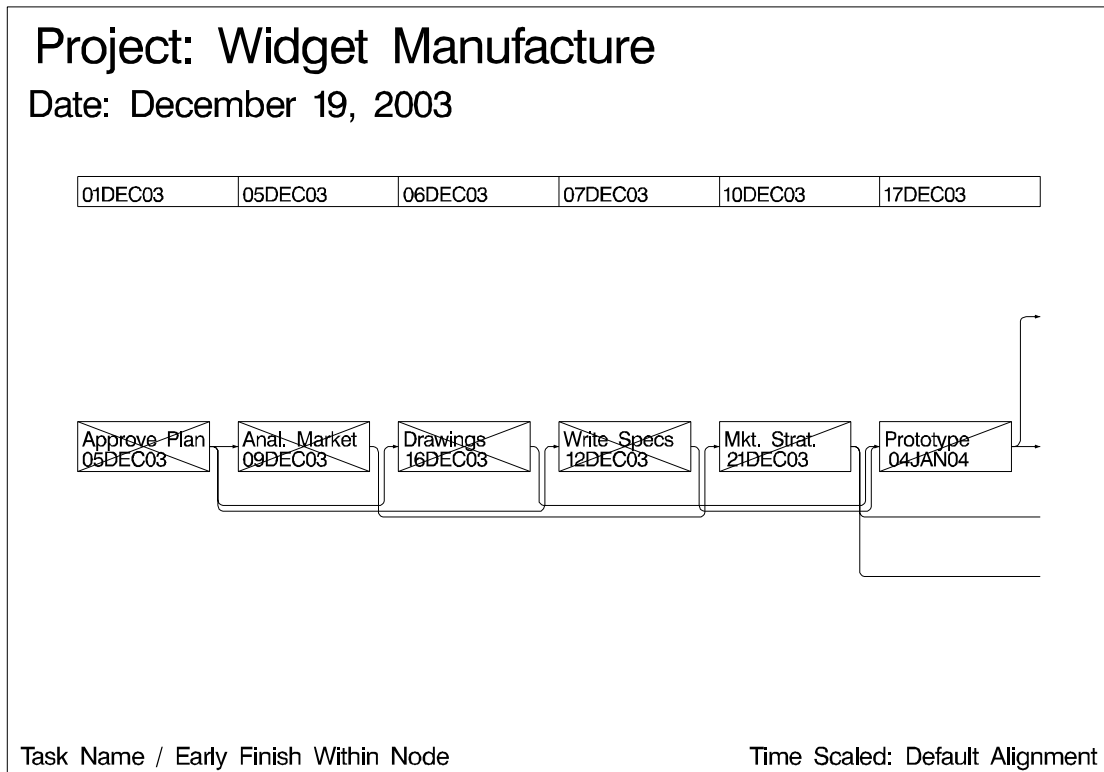
```

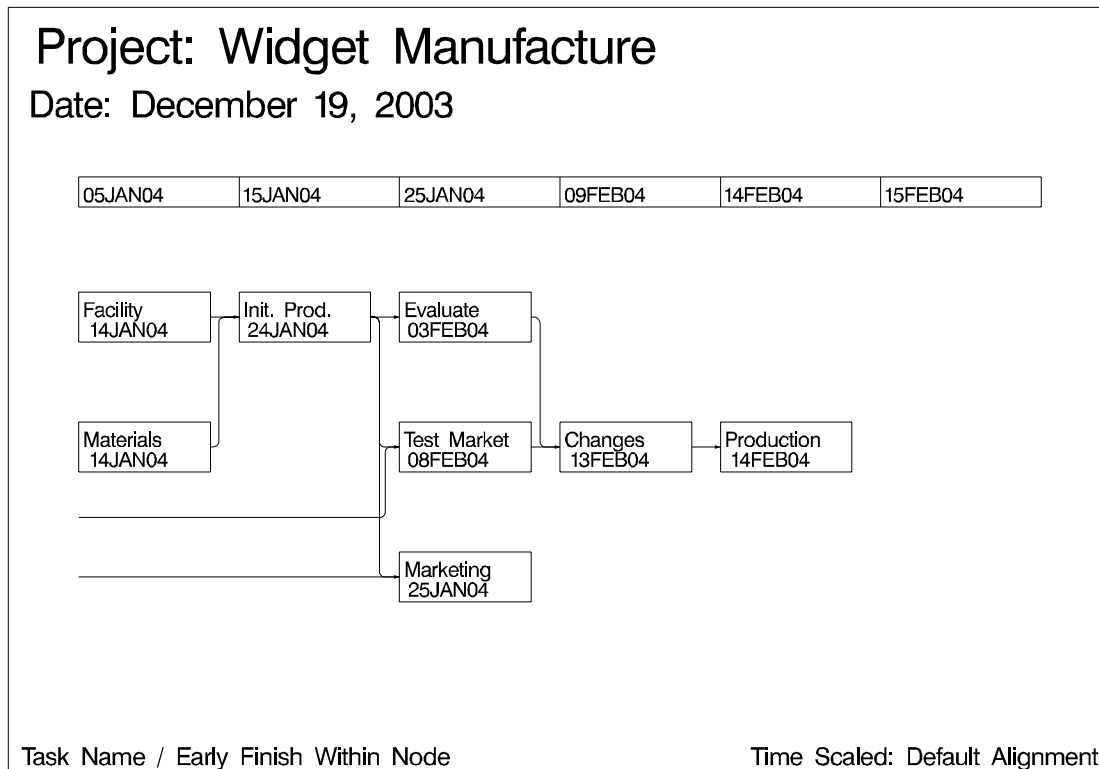
carcs=blue
ccritarcs=red
vmargin=5
hmargin=5
timescale
htext=2 pcompress
hpages=2 vpages=1
nopagenumber;

run;

```

Output 7.9.1. TIMESCALE Option: Default Alignment





Next, PROC NETDRAW is invoked with several of the time-scale options:

- The ALIGN= option requests that the activities be placed according to the L_START times.
- The FRAME option produces a border around the network diagram.
- The AUTOREF option draws reference lines at every tick mark.
- The LREF= and CREF= options specify the line style and color for the reference lines.
- The SHOWBREAK option requests that breaks in the time axis be indicated by breaks before the corresponding tick marks.

```
footnote j=l f=swiss h=1.5 ' Task Name / Late Finish Within Node'
        j=r f=swiss 'Time Scaled: Align = Late Start ';
```

```
proc netdraw data=widgupd graphics;
  actnet / act=task
    succ=(succ1 succ2 succ3)
  ybetween = 10
  separatearcs
  pcompress
  novcenter
  font=swiss
  id=(task l_finish)
```

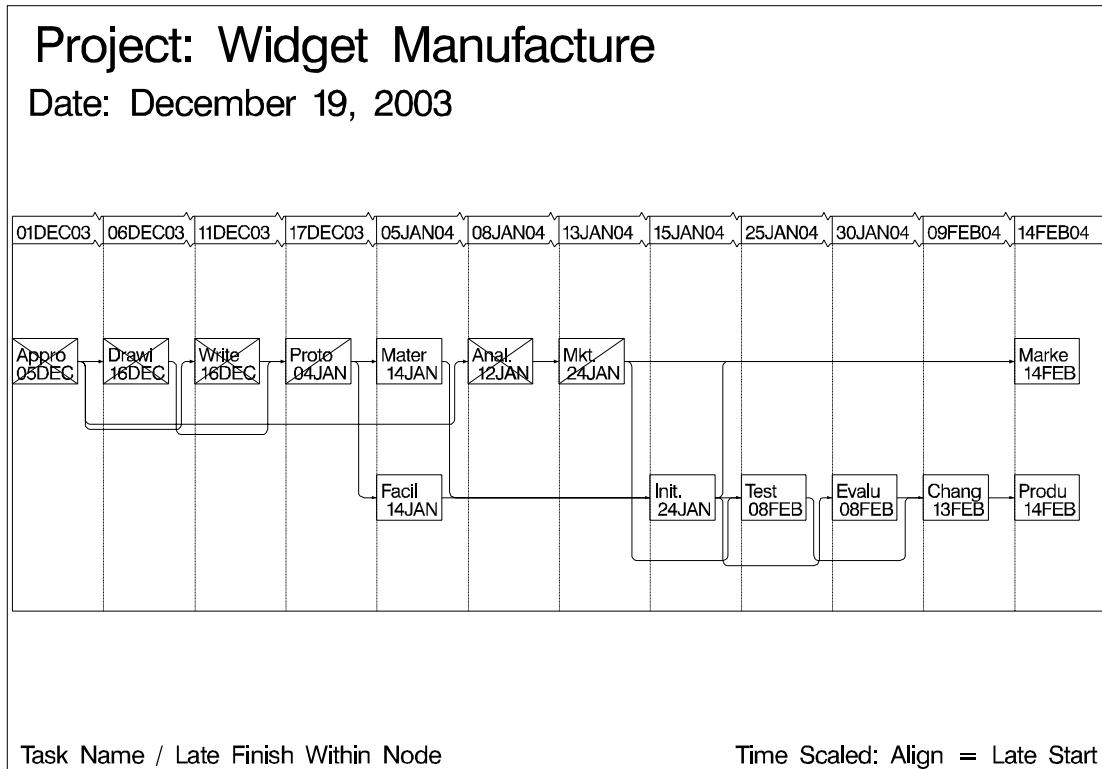
```

nodefid
nolabel
boxwidth=5
showstatus
carcs=cyan
ccritarcs=red
vmargin=10
align=l_start
frame
autoref
lref=33
cref=cyan
showbreak
htext=2;

run;

```

Output 7.9.2. Timescale Option: ALIGN= L_START



Example 7.10. Further Time-Scale Options

In this example, the construction project described in [Example 7.7](#) is used to illustrate some more time-scale options. First, the REFBREAK option indicates breaks in the time axis by drawing a zigzag line down the diagram before each tick mark corresponding to a break. The CREFBRK= and LREFBRK= options control the color and line style for these lines. The network diagram is shown in [Output 7.10.1](#).

```

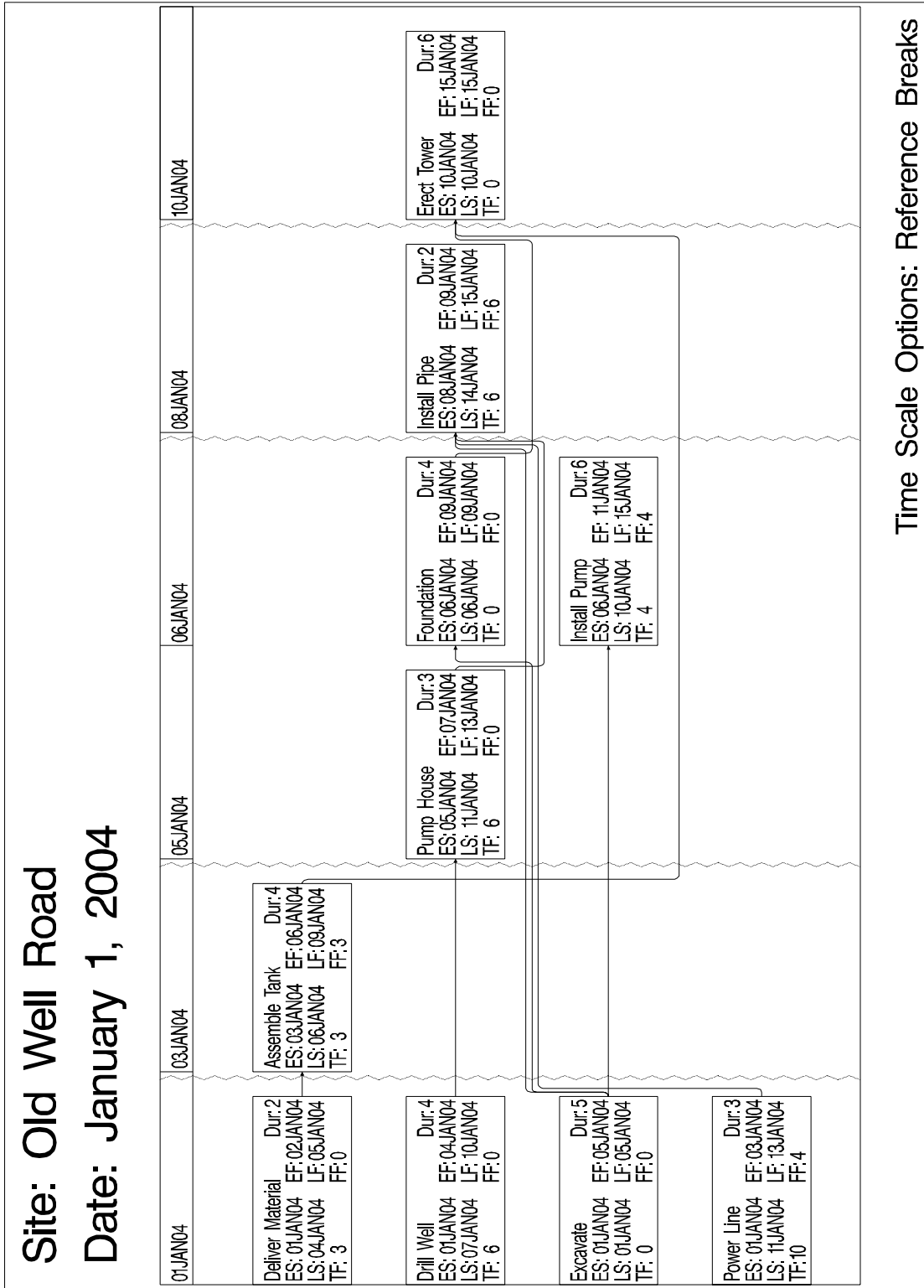
title f=swiss j=1 h=1.5 ' Site: Old Well Road';
title2 f=swiss j=1 h=1.5 ' Date: January 1, 2004';

```

```
footnote f=swiss j=r 'Time Scale Options: Reference Breaks ' ;

proc netdraw data=sched graphics;
  actnet / act = task font=swiss
    dur = duration
    succ = (succesr1-succesr3)
    dp compress separatearcs
    htext=2
    timescale refbreak lrefbrk = 33
    carcs = cyan crefbrk = blue;
run;
```

Output 7.10.1. Time-Scaled Network: Reference Breaks



Next, PROC NETDRAW is invoked with the LINEAR option so that there is no break in the time axis. The BOXWIDTH= option limits the size of each node. The diagram is drawn in [Output 7.10.2](#).

```
footnote f=swiss j=r 'Time Scale Options: Linear Diagram ' ;

proc netdraw data=sched graphics;
  actnet / act = task font=swiss
    dur = duration
    succ = (succesr1-succesr3)
    dp
    pcompress
    novcenter
    vmargin = 10
    separatearcs
    htext=2
    carcs=cyan
    id=(task)
    nodefid
    nolabel
    boxwidth=7
    timescale
    linear
    frame;

run;
```

Output 7.10.2. Time-Scaled Network: LINEAR Option



Example 7.11. Zoned Network Diagram

This example illustrates zoned network diagrams. The Widget Manufacturing project is used to illustrate some aspects of this feature. The data set DETAILS contains a variable `phase`, which identifies the phase of each activity in the project. This data set is merged with the Activity data set from [Example 7.1](#), WIDGET, to produce the data set NETWORK that is input to PROC NETDRAW. The `ZONE=` option divides the network diagram into horizontal zones based on the project phase. The `ZONEPAT` option causes the activities in each zone to be drawn using a different pattern. The resulting network diagram is shown in [Output 7.11.1](#).

```

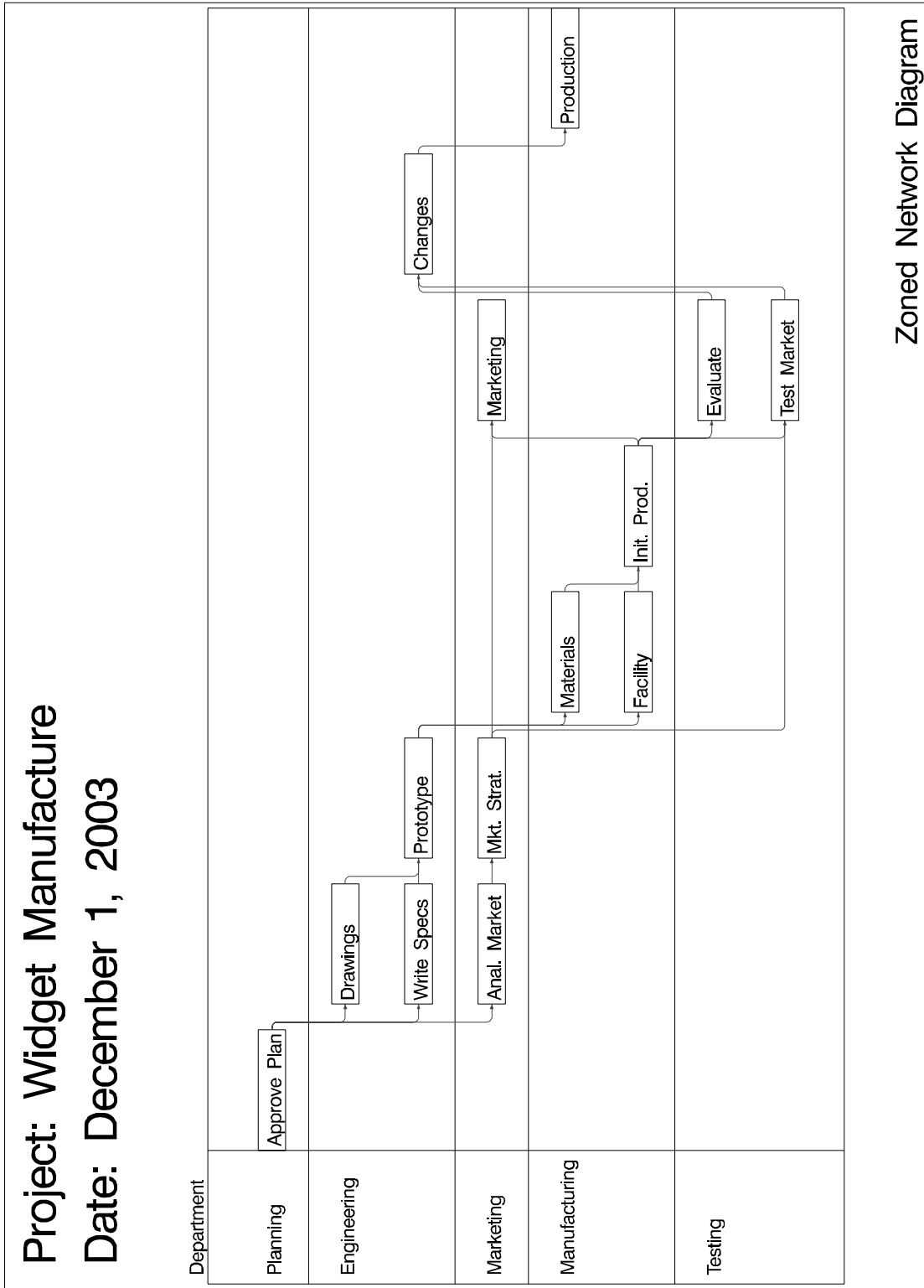
data details;
  format task $12. phase $13. descrpt $30. ;
  input task & phase $ descrpt & ;
  datalines;
Approve Plan   Planning           Develop Concept
Drawings       Engineering          Prepare Drawings
Anal. Market   Marketing             Analyze Potential Markets
Write Specs     Engineering          Write Specifications
Prototype      Engineering          Build Prototype
Mkt. Strat.    Marketing             Develop Marketing Concept
Materials      Manufacturing         Procure Raw Materials
Facility       Manufacturing         Prepare Manufacturing Facility
Init. Prod.    Manufacturing         Initial Production Run
Evaluate       Testing               Evaluate Product In-House
Test Market    Testing               Test Product in Sample Market
Changes        Engineering           Engineering Changes
Production     Manufacturing         Begin Full Scale Production
Marketing      Marketing             Begin Full Scale Marketing
;
data network;
  merge widget details;
  run;

pattern1 v=e c=green;
pattern2 v=e c=red;
pattern3 v=e c=magenta;
pattern4 v=e c=blue;
pattern5 v=e c=cyan;

title j=l f=swiss h=1.5 ' Project: Widget Manufacture';
title2 j=l f=swiss h=1.5 ' Date: December 1, 2003';
footnote j=r f=swiss 'Zoned Network Diagram ';
proc netdraw data=network graphics;
  actnet / act=task
          succ=(succ1 succ2 succ3)
          font = swiss
          separatearcs
          zone=phase zonepat
          pcompress htext=2;
  label phase = 'Department';
run;

```


Output 7.11.1. Zoned Network Diagram



Next, the project is scheduled with PROC CPM, and PROC NETDRAW is invoked with the ZONE= and TIMESCALE options. The nodes are placed in different zones as dictated by the ZONE variable, phase, and are aligned along the time axis as

dictated by the default ALIGN variable, E_START. The MININTERVAL= option produces one tick mark per week for the duration of the project. The LREF= option identifies the linestyle of the reference lines and the dividing lines between zones. The nodes are colored red or green according to whether or not the corresponding activities are critical (PATTERN statements 1 and 2 from the previous invocation of PROC NETDRAW are still valid).

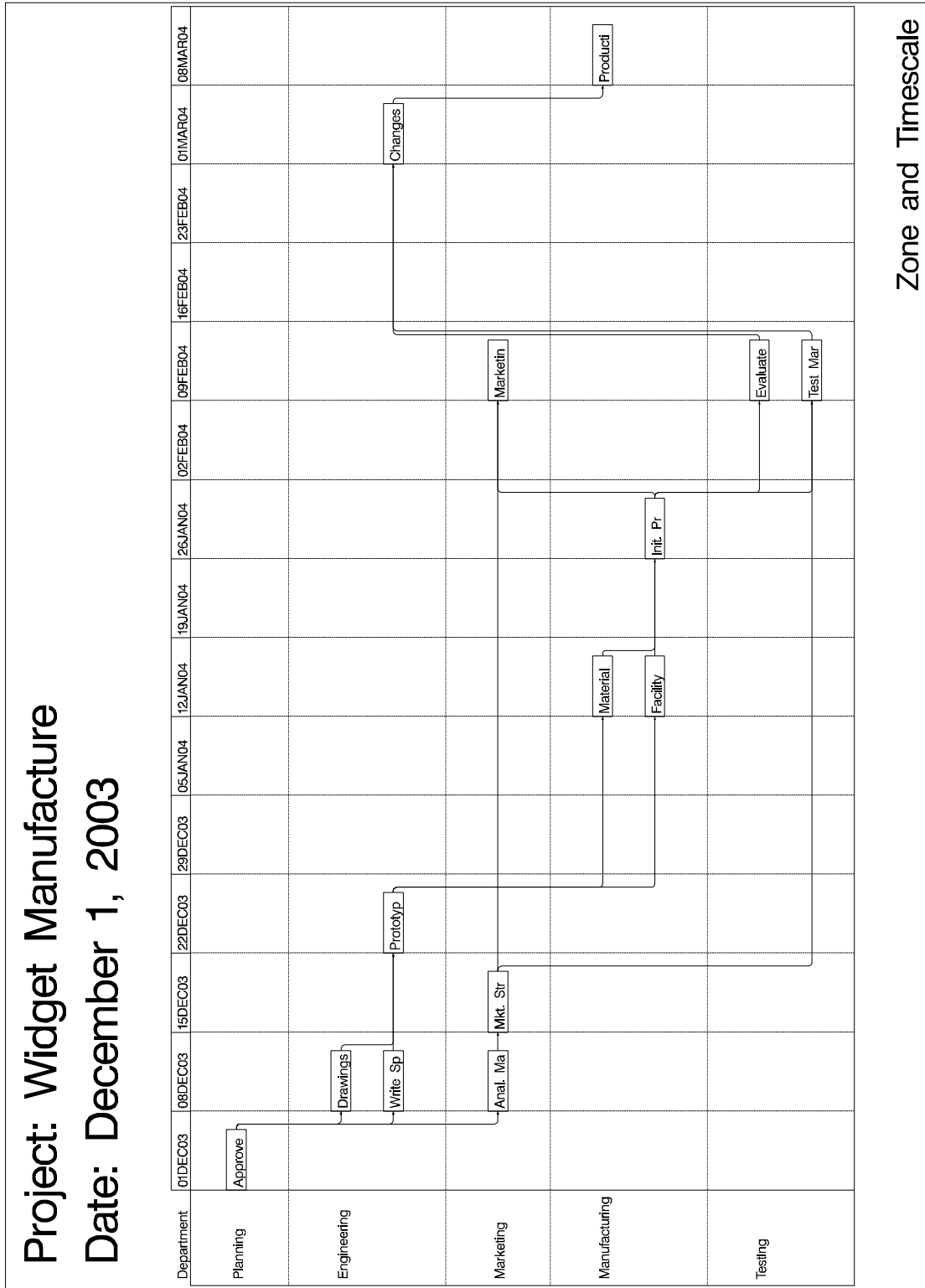
```

proc cpm data=network interval=weekday
    out=sched date='1dec03'd;
    activity task;
    succ    succ1 succ2 succ3;
    duration days;
    id phase;
    run;

footnote j=r f=swiss 'Zone and Timescale ';
proc netdraw data=sched graphics;
    actnet / act=task succ=(succ1 succ2 succ3)
    pcompress
    font = swiss
    carcs = blue ccritarcs = red
    cref = cyan
    caxis = magenta
    lref = 33
    id = (task)
    nodefid
    nolabel
    boxwidth = 8
    htext=2
    separatearcs
    timescale
    mininterval=week
    autoref
    linear
    zone=phase
    zonespace;
    label phase = 'Department';
    run;

```

Output 7.11.2. Zoned Network Diagram with Time Axis



Example 7.12. Schematic Diagrams

You can use PROC NETDRAW to determine node placement and arc routing for any network depicting a set of nodes connected by arcs. If you want the procedure to determine the node placement, the network must be acyclic. This example illustrates the use of PROC NETDRAW to draw two networks that represent different schematic flows. The first network does not contain any cycles, while the second one has one cycle; to draw the second network, you need to use the BREAKCYCLE option.

First, a schematic representation of the data flow going in and out of the three procedures (CPM, GANTT, and NETDRAW) is drawn using PROC NETDRAW. (See Chapter 1, “Introduction to Project Management,” for a detailed discussion of such a data flow.) The PATTERN= option is used to specify the variable in the data set that identifies the color that is to be used for each node. Nodes representing SAS/OR procedures are colored red, the ones representing output data sets are colored green, and all other nodes (representing the use of other parts of the SAS System) are colored blue. Three ID variables are used to specify the text that is to be placed within each node. The flow diagram is shown in [Output 7.12.1](#).

```

data dataflow;
  format id1 $18. id2 $14. id3 $19. ;
  input a $ b $ id1 & id2 & id3 & style;
  datalines;
A B Data Definition:      PROC FSEDIT,      SAS/AF, etc.      2
B C Data Manipulation:   Sort, Merge,    Concatenate, etc.  2
B D Data Manipulation:   Sort, Merge,    Concatenate, etc.  2
D C .                    PROC NETDRAW      .                1
C E PROC CPM             .                  PROC PM           1
C F PROC CPM             .                  PROC PM           1
E H Resource Usage      .                  Data             3
F G .                    Schedule Data     .                3
G I Data Manipulation:   Sort, Merge,    Subset, etc.      2
G J Data Manipulation:   Sort, Merge,    Subset, etc.      2
H K Data Manipulation:   Sort, Merge,    Subset, etc.      2
I . Other Reporting     PROC's: PRINT,  CALENDAR, etc.   2
J . PROC GANTT          .                  PROC NETDRAW      1
K . Reporting PROC's:   PLOT, CHART,   GPLOT, GCHART, etc.  2
;

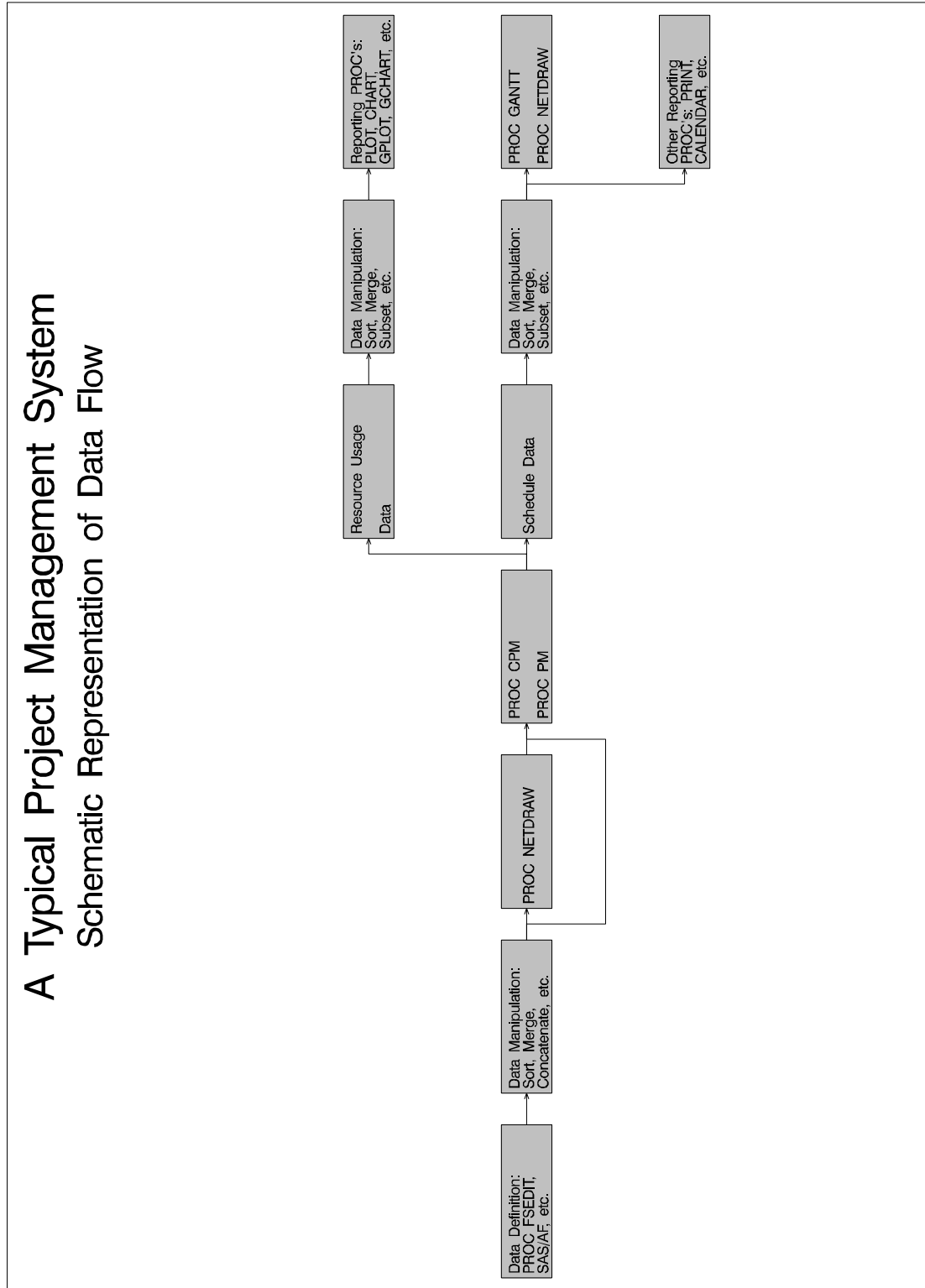
goptions hpos=110 vpos=70;
pattern1 v=s c=red;
pattern2 v=s c=blue;
pattern3 v=s c=green;

title f=swiss h=3 'A Typical Project Management System';
title2 f=swiss h=2.5 'Schematic Representation of Data Flow';
proc netdraw data=dataflow graphics;
  actnet / act=a succ=b id = (id1-id3)
          nodefaultid font=swiss
          nolabel
          pattern=style
          carcs=black

```

```
    coutline=black
    ctext=white
    hmargin = 2
    ybetween = 15
    rectilinear
    noarrowfill
    pcompress
    htext=2;
run;
```

Output 7.12.1. Schematic Representation of Data Flow



Next, a typical sequence of procedures followed at the scheduling of a nuclear power plant outage is shown using the NETDRAW procedure. Such a schematic diagram is illustrated in Chapter 1, “Introduction to Project Management.” In Figure

1.6, there is a cycle that is not normally allowed in a Network data set that is input to PROC NETDRAW. However, you can draw such networks by specifying the BREAKCYCLE option. (Note that you can also draw cyclic networks by specifying explicitly the node coordinates or an ALIGN= variable that fixes the x coordinates for each node.)

In this example, the data set OUTAGE contains the network representation. The variable style is used to color nodes appropriately. The resulting diagram is shown in [Output 7.12.2](#).

```

data outage;
  format id1 $12. id2 $12. ;
  input a $ b $ id1 & id2 & style;
  datalines;
A   B   Project      Definition      1
B   C   CPM          Schedule        2
C   D   Gantt Chart  Network        3
D   E   Start Power  Outage         4
E   F   Project      Update         1
F   G   Schedule     Update         2
G   E   Gantt Chart  Network        3
;

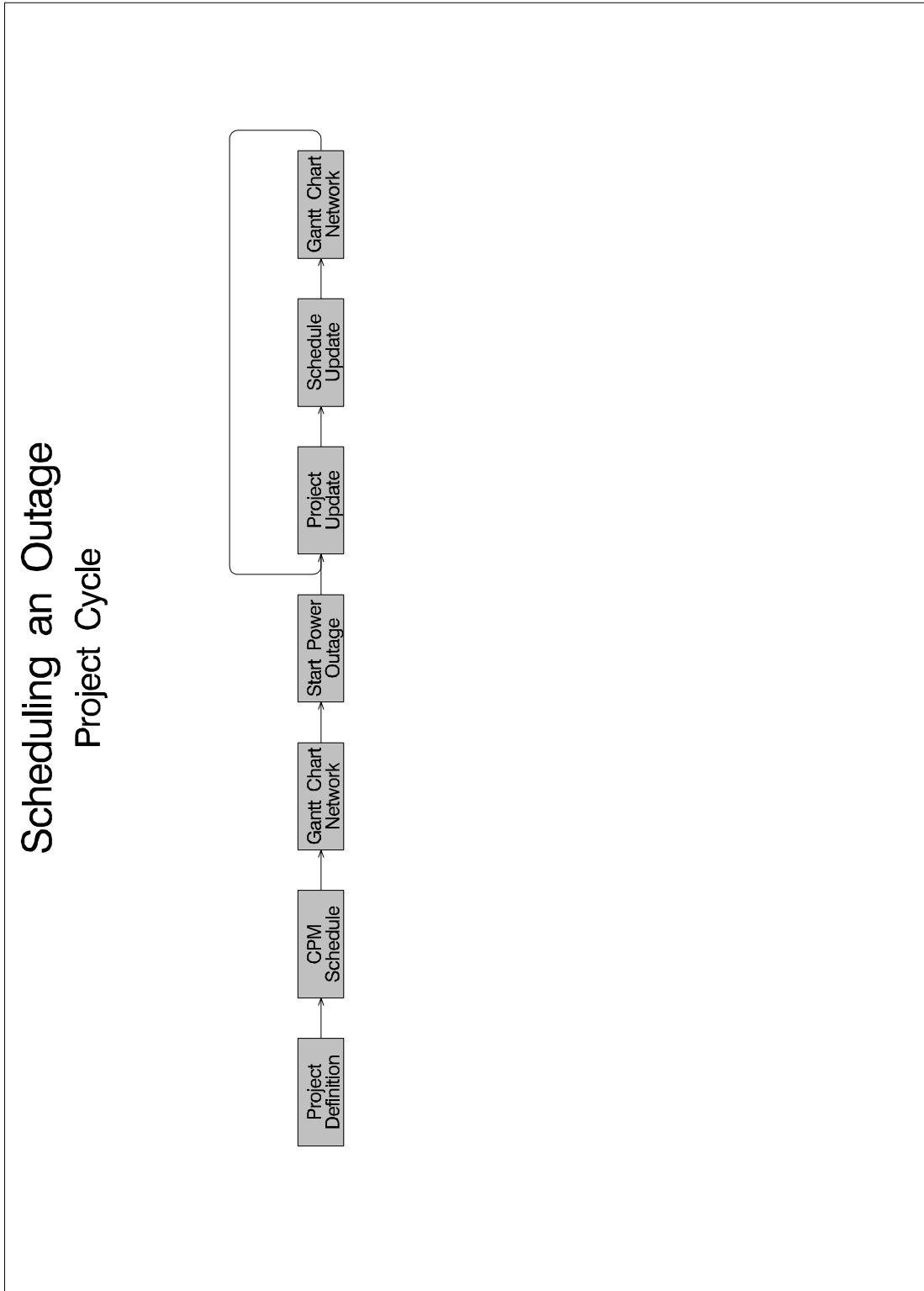
goptions hpos=110 vpos=70;
pattern1 v=s c=green;
pattern2 v=s c=blue;
pattern3 v=s c=blue;
pattern4 v=s c=red;

title f=swiss h=3 'Scheduling an Outage';
title2 f=swiss h=2.5 'Project Cycle';
proc netdraw data=outage graphics;
  actnet / act=a succ=b id = (id1 id2)
  breakcycle
  nodefaultid
  font=swiss
  centerid
  vmargin = 5 hmargin = 0
  nolabel
  novcenter
  pattern=style
  carcs=black coutline=black ctext=white
  ybetween = 15 xbetween=3
  noarrowfill
  pcompress
  htext=2;

run;

```

Output 7.12.2. Scheduling a Power Outage



Example 7.13. Modifying Network Layout

This example uses the SURVEY project described in [Chapter 1, “Introduction to Project Management,”](#) to illustrate how you can modify the default layout of the network. The data set SURVEY contains the project information. PROC NETDRAW is invoked with the GRAPHICS option. The network diagram is shown in [Output 7.13.1](#).

```

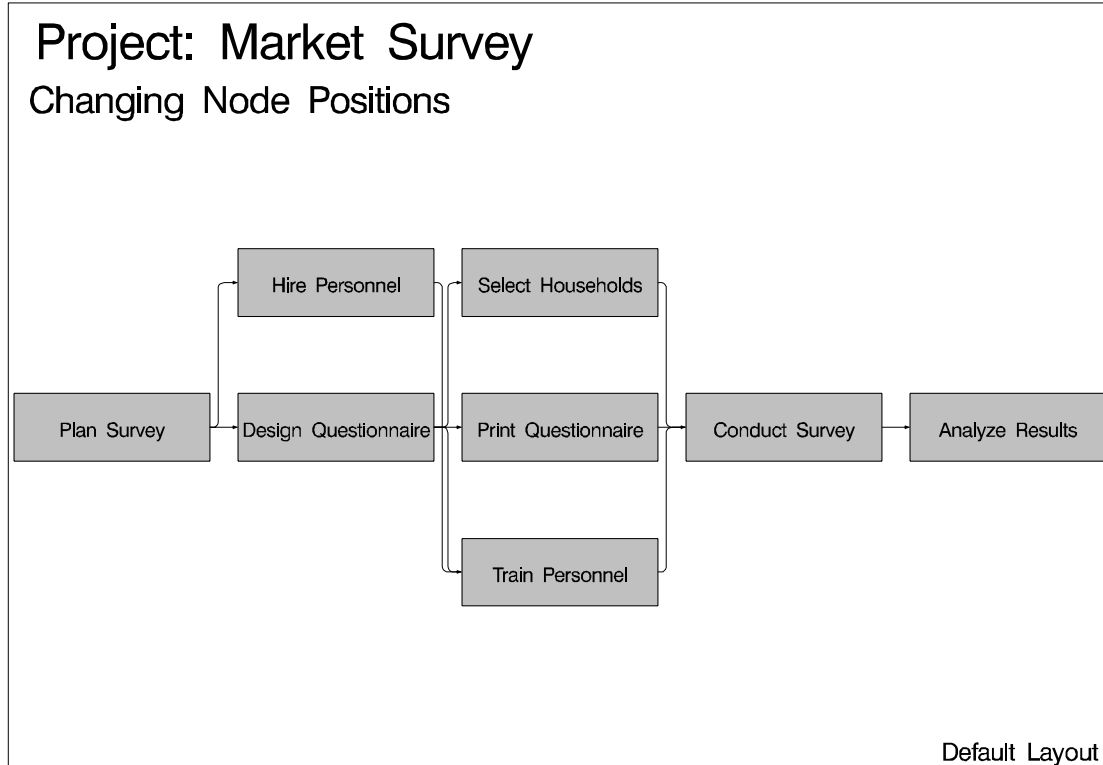
data survey;
  format id $20. activity succ1-succ3 $8. phase $9. ;
  input id      &
         activity &
         duration
         succ1   &
         succ2   &
         succ3   &
         phase   $ ;
  datalines;
Plan Survey          plan sur   4 hire per  design q  .          Plan
Hire Personnel      hire per   5 trn per  .          Prepare
Design Questionnaire design q   3 trn per  select h  print q  Plan
Train Personnel     trn per    3 cond sur  .          Prepare
Select Households  select h   3 cond sur  .          Prepare
Print Questionnaire print q    4 cond sur  .          Prepare
Conduct Survey     cond sur   10 analyze .          Implement
Analyze Results    analyze    6 .          .          Implement
;

pattern1 v=s c=green;
title f=swiss j=1 ' Project: Market Survey';
title2 f=swiss j=1 h=1.5 ' Changing Node Positions';
footnote f=swiss j=r 'Default Layout ';
proc netdraw data=survey graphics out=network;
actnet / act=activity
      succ=(succ1-succ3)
      id=(id)
      nodefid
      nolabel
      carcs = blue
      ctext  = white
      coutline=red
      font=swiss
      centerid
      boxht = 3
      htext=2
      pcompress
      separatearcs
      ybetween=8;

run;

title2 'NETWORK Output Data Set';
proc print data=network;
run;

```

Output 7.13.1. Default Network Layout of SURVEY Project

The Layout data set produced by PROC NETDRAW (displayed in [Output 7.13.2](#)) contains the x and y coordinates for all the nodes in the network and for all the turning points of the arcs connecting them.

Suppose that you want to interchange the positions of the nodes corresponding to the two activities, ‘Select Households’ and ‘Train Personnel.’ As explained in the “[Controlling the Layout](#)” section on page 648, you can invoke the procedure in FULLSCREEN mode and use the MOVE command to move the nodes to desired locations. In this example, the data set NETWORK produced by PROC NETDRAW is used to change the x and y coordinates of the nodes. A new data set called NODEPOS is created from NETWORK by retaining only the observations containing node positions (recall that for such observations, `_SEQ_ = ‘0’`) and by dropping the `_SEQ_` variable. Further, the y coordinates (given by the values of the `_Y_` variable) for the two activities ‘Select Households’ and ‘Train Personnel’ are interchanged. The new data set, displayed in [Output 7.13.3](#), is then input to PROC NETDRAW.

Output 7.13.2. Layout Data Set

Project: Market Survey NETWORK Output Data Set							
Obs	_FROM_	_TO_	_X_	_Y_	_SEQ_	_PATTERN	id
1	plan sur	hire per	1.0	2	0	1	Plan Survey
2	plan sur	hire per	1.5	2	1	.	Plan Survey
3	plan sur	hire per	1.5	3	2	.	Plan Survey
4	plan sur	design q	1.0	2	0	1	Plan Survey
5	hire per	trn per	2.0	3	0	1	Hire Personnel
6	hire per	trn per	2.5	3	1	.	Hire Personnel
7	hire per	trn per	2.5	1	2	.	Hire Personnel
8	design q	trn per	2.0	2	0	1	Design Questionnaire
9	design q	trn per	2.5	2	1	.	Design Questionnaire
10	design q	trn per	2.5	1	2	.	Design Questionnaire
11	design q	select h	2.0	2	0	1	Design Questionnaire
12	design q	select h	2.5	2	1	.	Design Questionnaire
13	design q	select h	2.5	3	2	.	Design Questionnaire
14	design q	print q	2.0	2	0	1	Design Questionnaire
15	trn per	cond sur	3.0	1	0	1	Train Personnel
16	trn per	cond sur	3.5	1	1	.	Train Personnel
17	trn per	cond sur	3.5	2	2	.	Train Personnel
18	select h	cond sur	3.0	3	0	1	Select Households
19	select h	cond sur	3.5	3	1	.	Select Households
20	select h	cond sur	3.5	2	2	.	Select Households
21	print q	cond sur	3.0	2	0	1	Print Questionnaire
22	cond sur	analyze	4.0	2	0	1	Conduct Survey
23	analyze		5.0	2	0	1	Analyze Results

```

data nodepos;
  set network;
  if _seq_ = 0;
  drop _seq_;
  if _from_ = 'select h' then _y_=1;
  if _from_ = 'trn per' then _y_=3;
run;

title2 'Modified Node Positions';
proc print data=nodepos;
run;

```

Output 7.13.3. Modified Layout Data Set

Project: Market Survey Modified Node Positions						
Obs	_FROM_	_TO_	_X_	_Y_	_PATTERN	id
1	plan sur	hire per	1	2	1	Plan Survey
2	plan sur	design q	1	2	1	Plan Survey
3	hire per	trn per	2	3	1	Hire Personnel
4	design q	trn per	2	2	1	Design Questionnaire
5	design q	select h	2	2	1	Design Questionnaire
6	design q	print q	2	2	1	Design Questionnaire
7	trn per	cond sur	3	3	1	Train Personnel
8	select h	cond sur	3	1	1	Select Households
9	print q	cond sur	3	2	1	Print Questionnaire
10	cond sur	analyze	4	2	1	Conduct Survey
11	analyze		5	2	1	Analyze Results

Note that the data set NODEPOS contains variables named `_FROM_` and `_TO_`, which specify the (activity, successor) information; hence, the call to PROC

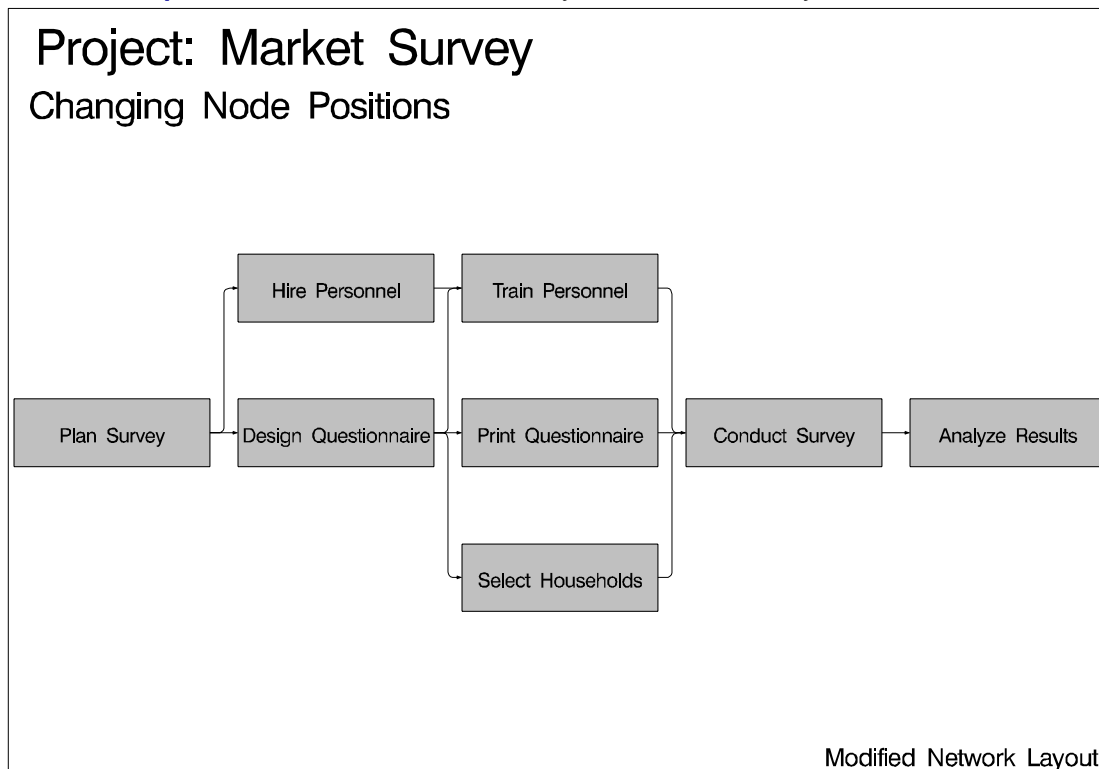
NETDRAW does not contain the `ACTIVITY=` and `SUCCESSOR=` specifications. The presence of the variables `_X_` and `_Y_` indicates to PROC NETDRAW that the data set contains the x and y coordinates for all the nodes. Because there is no variable named `_SEQ_` in this data set, PROC NETDRAW assumes that only the node coordinates are given and uses these node positions to determine how the arcs are to be routed. The resulting network diagram is shown in [Output 7.13.4](#).

```

title2 f=swiss j=1 h=1.5 ' Changing Node Positions';
footnote f=swiss j=r 'Modified Network Layout ';
proc netdraw data=nodepos graphics;
  actnet / id=(id)
          nodefid
          nolabel
          carcs = blue
          ctext = white
          coutline = red
          font = swiss
          centerid
          boxht = 3
          htext=2
          pcompress
          separatearcs
          ybetween=8;
run;

```

Output 7.13.4. Modified Network Layout of SURVEY Project



Example 7.14. Specifying Node Positions

This example uses a typical problem in network flow optimization to illustrate how you can use PROC NETDRAW to draw a network by specifying completely all the node positions. Consider a simple two-period production inventory problem with one manufacturing plant (PLANT), two warehouses (DEPOT1 and DEPOT2), and one customer (CUST). In each period, the customer can receive goods directly from the plant or from the two warehouses. The goods produced at the plant can be used to satisfy directly some or all of the customer's demands or can be shipped to a warehouse. Some of the goods can also be carried over to the next period as inventory at the plant. The problem is to determine the minimum cost of satisfying the customer's demands; in particular, how much of the customer's demands in each period is to be satisfied from the inventory at the two warehouses or from the plant, and also how much of the production is to be carried over as inventory at the plant? This problem can be solved using PROC NETFLOW; the details are not discussed here. Let `PLANT_i` represent the production at the plant in period `i`, `DEPOT1_i` represent the inventory at DEPOT1 in period `i`, `DEPOT2_i` represent the inventory at DEPOT2 in period `i`, and `CUST_i` represent the customer's demand in period `i` (`i` = 1, 2). These variables can be thought of as nodes in a network with the following data representing the `COST` and `CAPACITY` of the arcs connecting them:

FROM	TO	COST	CAPACITY
PLANT_1	CUST_1	10	75
PLANT_1	DEPOT1_1	7	75
PLANT_1	DEPOT2_1	8	75
DEPOT1_1	CUST_1	3	20
DEPOT2_1	CUST_1	2	10
PLANT_1	PLANT_2	2	100
DEPOT1_1	DEPOT1_2	1	100
DEPOT2_1	DEPOT2_2	1	100
PLANT_2	CUST_2	10	75
PLANT_2	DEPOT1_2	7	75
PLANT_2	DEPOT2_2	8	75
DEPOT1_2	CUST_2	3	20
DEPOT2_2	CUST_2	2	10
CUST_1	.	.	.
CUST_2	.	.	.

Suppose that you want to use PROC NETDRAW to draw the network corresponding to the preceding network flow problem and suppose also that you require the nodes to be placed in specific positions. The following program saves the network information along with the required node coordinates in the Network data set `ARCS` and invokes PROC NETDRAW to draw the network diagram shown in [Output 7.14.1](#). The Network data set also contains a variable named `_pattern`, which specifies that pattern statement 1 be used for nodes relating to period 1 and pattern statement 2 be used for those relating to period 2.

```
data arcs;
  input from $ to $ _x_ _y_ _pattern;
```

```

    datalines;
    PLANT_1  CUST_1      1  5  1
    PLANT_1  DEPOT1_1   1  5  1
    PLANT_1  DEPOT2_1   1  5  1
    DEPOT1_1 CUST_1     2  6  1
    DEPOT2_1 CUST_1     2  4  1
    PLANT_1  PLANT_2    1  5  1
    DEPOT1_1 DEPOT1_2   2  6  1
    DEPOT2_1 DEPOT2_2   2  4  1
    PLANT_2  CUST_2     4  2  2
    PLANT_2  DEPOT1_2   4  2  2
    PLANT_2  DEPOT2_2   4  2  2
    DEPOT1_2 CUST_2     5  3  2
    DEPOT2_2 CUST_2     5  1  2
    CUST_1   .          3  5  1
    CUST_2   .          6  2  2
    ;

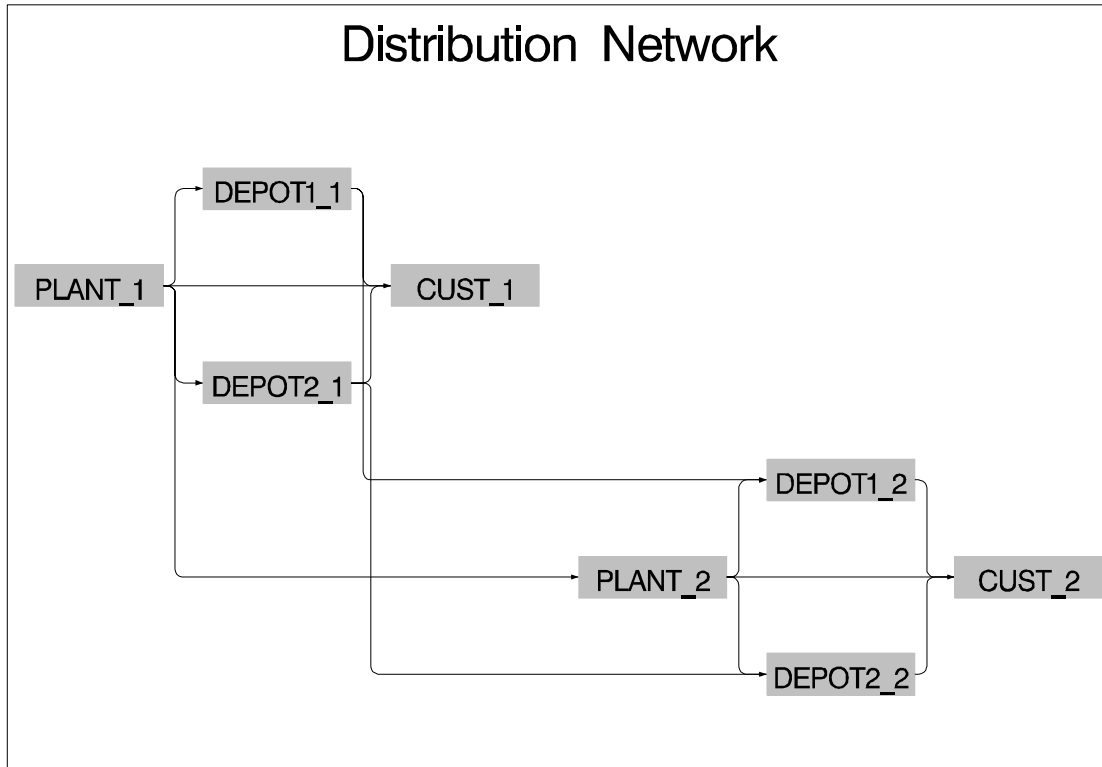
    pattern1 v=s  c=green;
    pattern2 v=s  c=red;

    title f=swiss c=blue 'Distribution Network';
    proc netdraw data=arcs graphics out=netout;
        actnet / act=from
                succ=to
                separatearcs
                font=swiss
                ybetween = 4
                centerid
                ctext = white
                carcs = blue
                htext=2
                pcompress;
    run;

```

Note: This network diagram can also be drawn by using suitably defined ZONE and ALIGN variables.

Output 7.14.1. Distribution Network



Example 7.15. Organizational Charts with PROC NETDRAW

This example illustrates using the TREE option to draw organizational charts. The Network data set, DOCUMENT, describes how the procedures are distributed between two volumes of the SAS/OR documentation. The structure can be visualized easily in a tree diagram. The data set DOCUMENT contains the parent-child relationship for each node of the diagram. For each node, a detailed description is contained in the variable ID. In addition, the variable `_pattern` specifies the pattern to be used for each node. PROC NETDRAW is invoked with the TREE option, which illustrates the organization of the documentation in the form of a tree diagram drawn from left to right. The CENTERID option centers text within each node. Arrowheads are not necessary for this diagram and are suppressed by specifying ARROWHEAD=0. Output 7.15.1 shows the resulting diagram.

```

data document;
  format parent child $8. id $24.;
  input parent $ child $ id & _pattern;
  datalines;
OR      MPBOOK      Operations Research      1
OR      PMBOOK      Operations Research      1
PMBOOK  CPM          Project Management       2
PMBOOK  DTREE       Project Management       2
PMBOOK  GANTT       Project Management       2
PMBOOK  NETDRAW     Project Management       2
PMBOOK  PM          Project Management       2
PMBOOK  PROJMAN     Project Management       2

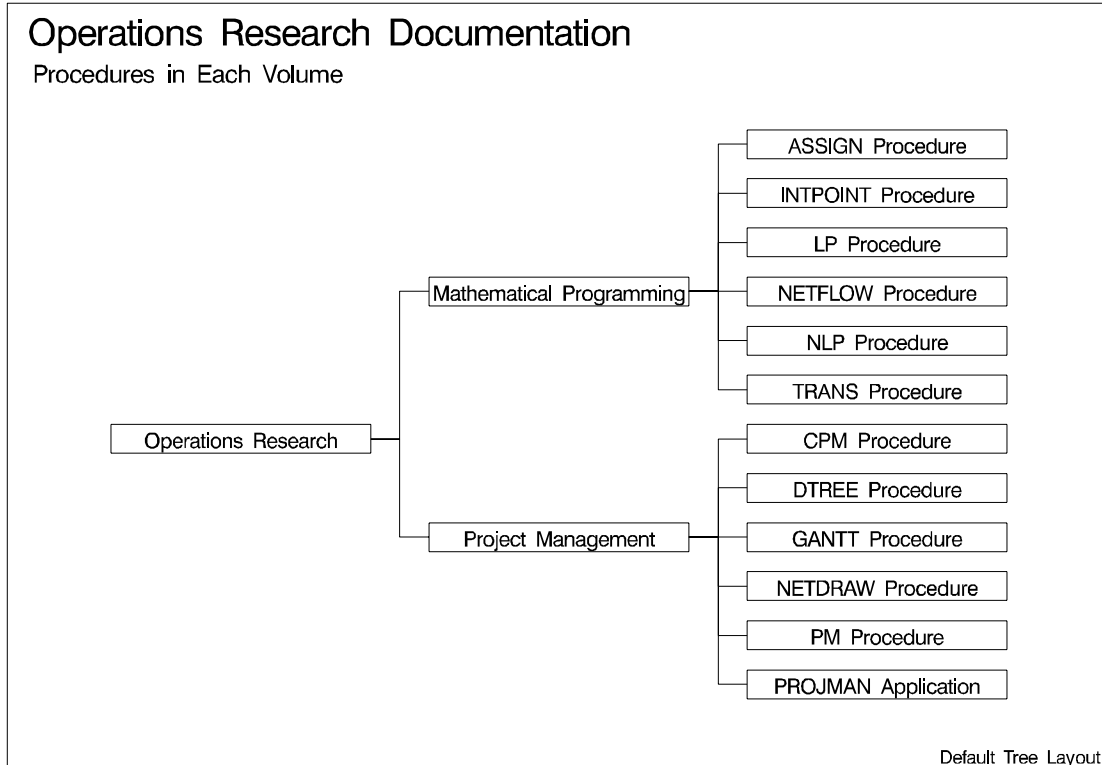
```

MPBOOK	ASSIGN	Mathematical Programming	3
MPBOOK	INTPOINT	Mathematical Programming	3
MPBOOK	LP	Mathematical Programming	3
MPBOOK	NETFLOW	Mathematical Programming	3
MPBOOK	NLP	Mathematical Programming	3
MPBOOK	TRANS	Mathematical Programming	3
CPM	.	CPM Procedure	2
DTREE	.	DTREE Procedure	2
GANTT	.	GANTT Procedure	2
NETDRAW	.	NETDRAW Procedure	2
PM	.	PM Procedure	2
PROJMAN	.	PROJMAN Application	2
ASSIGN	.	ASSIGN Procedure	3
INTPOINT	.	INTPOINT Procedure	3
LP	.	LP Procedure	3
NETFLOW	.	NETFLOW Procedure	3
NLP	.	NLP Procedure	3
TRANS	.	TRANS Procedure	3

;

```
goptions ftext=swiss;
pattern1 v=s c=blue;
pattern2 v=s c=red;
pattern3 v=s c=green;
```

```
title j=1 h=1.5 ' Operations Research Documentation';
title2 j=1 h=1 ' Procedures in Each Volume';
footnote j=r h=.75 'Default Tree Layout ';
proc netdraw graphics data=document;
  actnet / act=parent
          succ=child
          id=(id)
          nodefid
          nolabel
          pcompress
          centerid
          tree
          arrowhead=0
          xbetween=15
          ybetween=3
          rectilinear
          carcs=black
          ctext=white
          htext=3;
run;
```

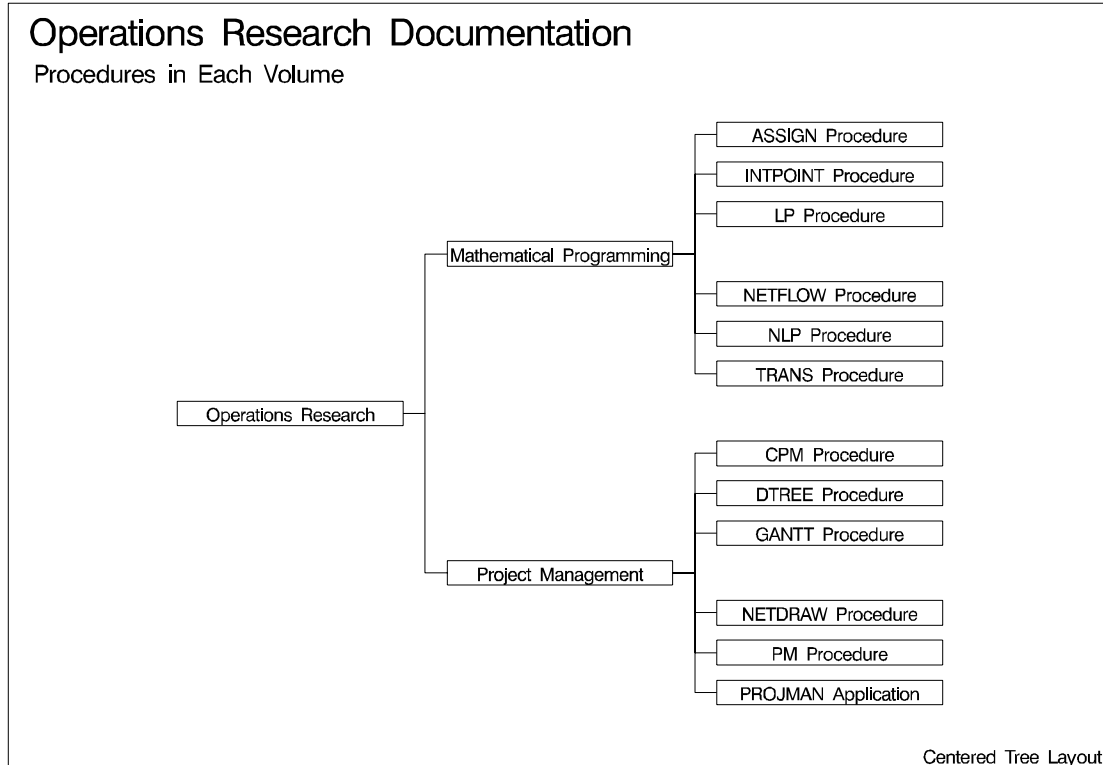

Output 7.15.1. Organization of Documentation: Default TREE Layout

The procedure draws the tree compactly with the successors of each node being placed to the immediate right of the node, ordered from top to bottom in the order of occurrence in the Network data set. The next invocation of PROC NETDRAW illustrates the effect of the SEPARATESONS and CENTERSUBTREE options on the layout of the tree (see [Output 7.15.2](#)).

```

footnote j=r h=.75 'Centered Tree Layout ' ;
proc netdraw graphics data=document;
  actnet / act=parent
          succ=child
          id=(id)
          nodefid
          nolabel
          pcompress
          novcenter
          centerid
          tree
          arrowhead=0
          separatesons
          centersubtree
          xbetween=15
          ybetween=3
          rectilinear
          carcs=black
          ctext=white
          htext=3.5;
run;

```

Output 7.15.2. Organization of Documentation: Controlled TREE Layout

Example 7.16. Annotate Facility with PROC NETDRAW

This example demonstrates the use of PROC NETDRAW for a nonstandard application. The procedure is used to draw a time table for a class of students. The days of the week are treated as different zones, and the times within a day are treated as different values of an alignment variable. The following DATA step defines a total of twenty activities, 'm1', ..., 'f5', which refer to the five different periods for the five different days of the week. The variable **class** contains the name of the subject taught in the corresponding period and day. Note that the periods are taught during the hours 1, 2, 3, 5, and 6; the fourth hour is set aside for lunch. The time axis is labeled with the format **CLASSTIM**, which is defined using PROC FORMAT. The **USEFORMAT** option in the **ACTNET** statement instructs PROC NETDRAW to use the explicit format specified for the time variable rather than the default format.

This example also illustrates the use of the Annotate facility with PROC NETDRAW. The data set **ANNO** labels the fourth period 'LUNCH.' The positions for the text are specified using data coordinates that refer to the (**_X_**, **_Y_**) grid used by PROC NETDRAW. Thus, for example **X = '4'** identifies the *x* coordinate for the annotated text to be the fourth period, and the *y* coordinates are set appropriately. The resulting time table is shown in [Output 7.16.1](#).

```

/* Define format for the ALIGN= variable */
proc format;
  value classtim 1 = ' 9:00 - 10:00'
                2 = '10:00 - 11:00'

```

```

3 = '11:00 - 12:00'
4 = '12:00 - 1:00 '
5 = ' 1:00 - 2:00 '
6 = ' 2:00 - 3:00 ';

run;

data schedule;
  format day $9. class $12. ;
  input day $ class & time daytime $ msucc $;
  format time classtim.;
  label day = "Day \ Time";
  datalines;
Monday    Mathematics    1    m1    .
Monday    Language        2    m2    .
Monday    Soc. Studies    3    m3    .
Monday    Art              5    m4    .
Monday    Science          6    m5    .
Tuesday   Language        1    t1    .
Tuesday   Mathematics     2    t2    .
Tuesday   Science         3    t3    .
Tuesday   Music           5    t4    .
Tuesday   Soc. Studies    6    t5    .
Wednesday Mathematics     1    w1    .
Wednesday Language      2    w2    .
Wednesday Soc. Studies  3    w3    .
Wednesday Phys. Ed.     5    w4    .
Wednesday Science       6    w5    .
Thursday  Language       1    th1   .
Thursday  Mathematics    2    th2   .
Thursday  Science        3    th3   .
Thursday  Phys. Ed.      5    th4   .
Thursday  Soc. Studies   6    th5   .
Friday    Mathematics     1    f1    .
Friday    Language        2    f2    .
Friday    Soc. Studies    3    f3    .
Friday    Library         5    f4    .
Friday    Science         6    f5    .
;

data anno;
  /* Set up required variable lengths, etc. */
  length function color style    $8;
  length xsys ysys hsys         $1;
  length when position          $1;

  xsys    = '2';
  ysys    = '2';
  hsys    = '4';
  when    = 'a';

  function = 'label    ';
  x = 4;
  size = 2;

```

```

position = '5';
y=5; text='L'; output;
y=4; text='U'; output;
y=3; text='N'; output;
y=2; text='C'; output;
y=1; text='H'; output;
run;

pattern1 v=s c=magenta;
title 'Class Schedule: 2003-2004';
footnote j=l ' Teacher: Mr. A. Smith Hall'
          j=r 'Room: 107 ';
proc netdraw graphics data=schedule anno=anno;
  actnet / act=daytime
          succ=msucc
          id=(class)
          nodefid nolabel
          zone=day
          align=time
          useformat
          linear
          pcompress
          coutline=black
          hmargin = 2 vmargin = 2
          htext=2;
run;

```

Output 7.16.1. Use of the Annotate Facility

Class Schedule: 2003 – 2004						
Day \ Time	9:00 – 10:00	10:00 – 11:00	11:00 – 12:00	12:00 – 1:00	1:00 – 2:00	2:00 – 3:00
Monday	Mathematics	Language	Soc. Studies	L	Art	Science
Tuesday	Language	Mathematics	Science	U	Music	Soc. Studies
Wednesday	Mathematics	Language	Soc. Studies	N	Phys. Ed.	Science
Thursday	Language	Mathematics	Science	C	Phys. Ed.	Soc. Studies
Friday	Mathematics	Language	Soc. Studies	H	Library	Science

Teacher: Mr. A. Smith Hall Room: 107

Example 7.17. AOA Network Using the Annotate Facility

This example illustrates the use of the Annotate Facility to draw an Activity-on-Arc network. First, PROC NETDRAW is invoked with explicit node positions for the vertices of the network. The ALIGN= and ZONE= options are used to provide horizontal and vertical axes as a frame of reference. The resulting diagram is shown in [Output 7.17.1](#).

```

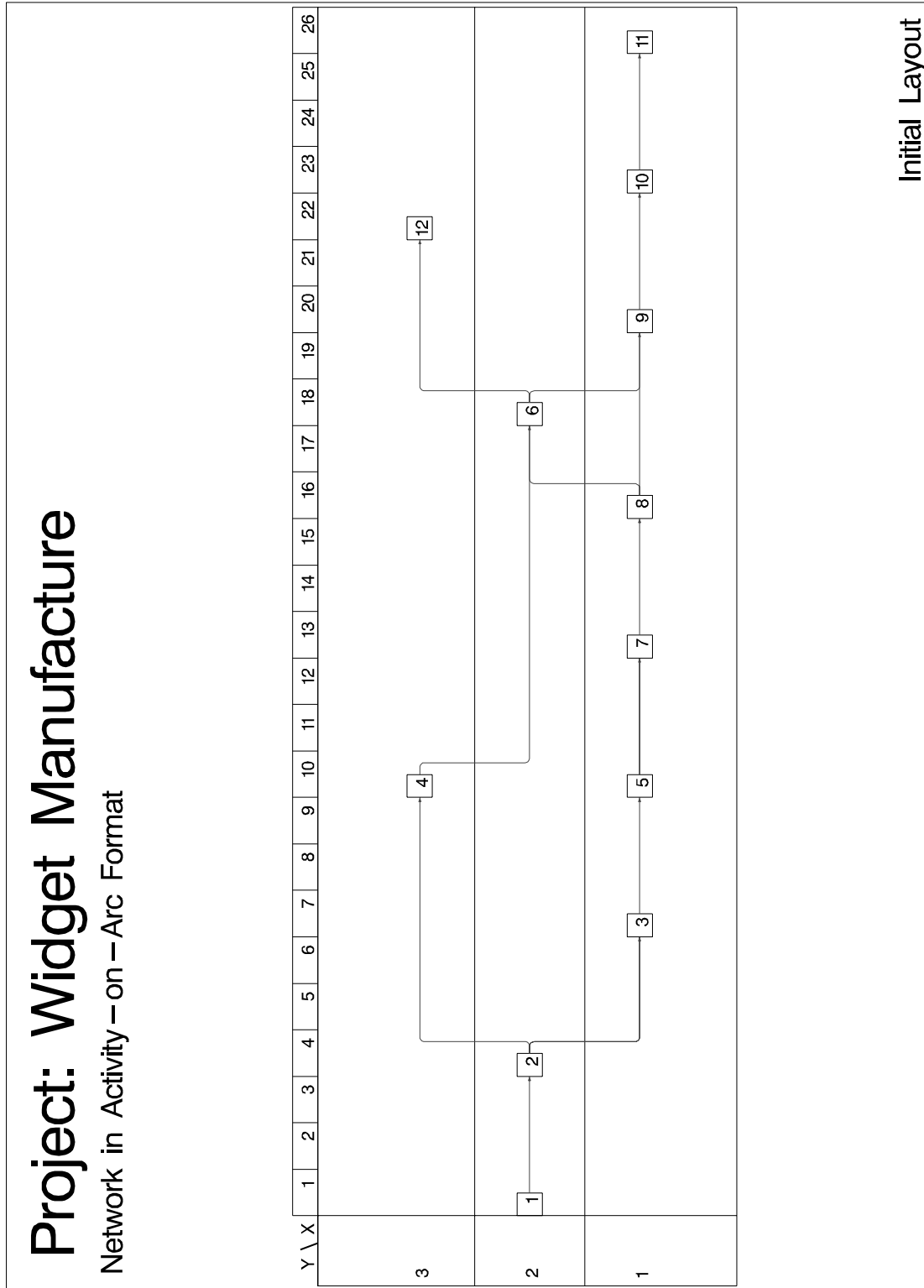
data widgaoa;
  format task $12. ;
  input task & days tail head _x_ _y_;
  datalines;
Approve Plan    5    1    2    1    2
Drawings       10    2    3    4    2
Anal. Market   5    2    4    4    2
Write Specs     5    2    3    4    2
Prototype      15    3    5    7    1
Mkt. Strat.   10    4    6   10    3
Materials      10    5    7   10    1
Facility       10    5    7   10    1
Init. Prod.    10    7    8   13    1
Evaluate       10    8    9   16    1
Test Market    15    6    9   18    2
Changes         5    9   10   20    1
Production     0   10   11   23    1
Marketing       0    6   12   19    2
Dummy          0    8    6   16    1
.              .   11    .   26    1
.              .   12    .   22    3
;

pattern1 v=e c=red;
title j=1 ' Project: Widget Manufacture';
title2 j=1 ' Network in Activity-on-Arc Format';
footnote j=r 'Initial Layout ';

proc netdraw graphics data=widgaoa out=netout;
  actnet / act=tail
          succ=head
          id=(tail)
          align=_x_
          zone=_y_
          ybetween = 10
          nodefid
          nolabel
          pcompress
          htext=2;
  label _y_=' Y \ X ';
run;

```

Output 7.17.1. Activity-on-Arc Format



In Output 7.17.1, the arc leading from vertex '4' to vertex '6' has two turning points: (10.5, 3) and (10.5, 2). Suppose that you want the arc to be routed differently, to provide a more symmetric diagram. The next DATA step creates a data set, NETIN,

which changes the x coordinates of the turning points to 16.5 instead of 10.5. Further, two Annotate data sets are created: the first one labels the nodes outside the boxes, either to the top or to the bottom, and the second one sets labels for the arcs. PROC NETDRAW is then invoked with the combined Annotate data set to produce the diagram shown in [Output 7.17.2](#).

```

data netin;
  set netout;
  if _from_=4 and _to_=6 and _seq_>0 then _x_=16.5;
run;

data anno1;
  set netout;
  if _seq_=0;
  /* Set up required variable lengths, etc. */
  length function color style    $8;
  length xsys ysys hsys          $1;
  length when position           $1;
  length text                     $12;
  xsys      = '2';
  ysys      = '2';
  hsys      = '4';
  when      = 'a';
  /* label the nodes using node numbers */
  function = 'label  ';
  size = 2;
  position = '5';
  text = left(put(tail, f2.));
  x=_x_;
  if _y_ = 1 then y=_y_-.3;
  else          y=_y_+.5;
run;

data anno2;
  /* Set up required variable lengths, etc. */
  length function color style    $8;
  length xsys ysys hsys          $1;
  length when position           $1;
  length text                     $12;
  xsys      = '2';
  ysys      = '2';
  hsys      = '4';
  when      = 'a';
  /* label the arcs using Activity names */
  function = 'label  ';
  size = 2;
  position = '5';
  x=2.5;  y=1.8;  text='Approve Plan';  output;
  x=5.5;  y=.8;   text='Drawings';     output;
  x=5.7;  y=1.4;  text='Write Specs';   output;
  x=7;    y=3.4;  text='Anal.Market';  output;
  x=8.5;  y=.8;   text='Prototype';    output;
  x=11.5; y=1.4;  text='Facility';     output;

```

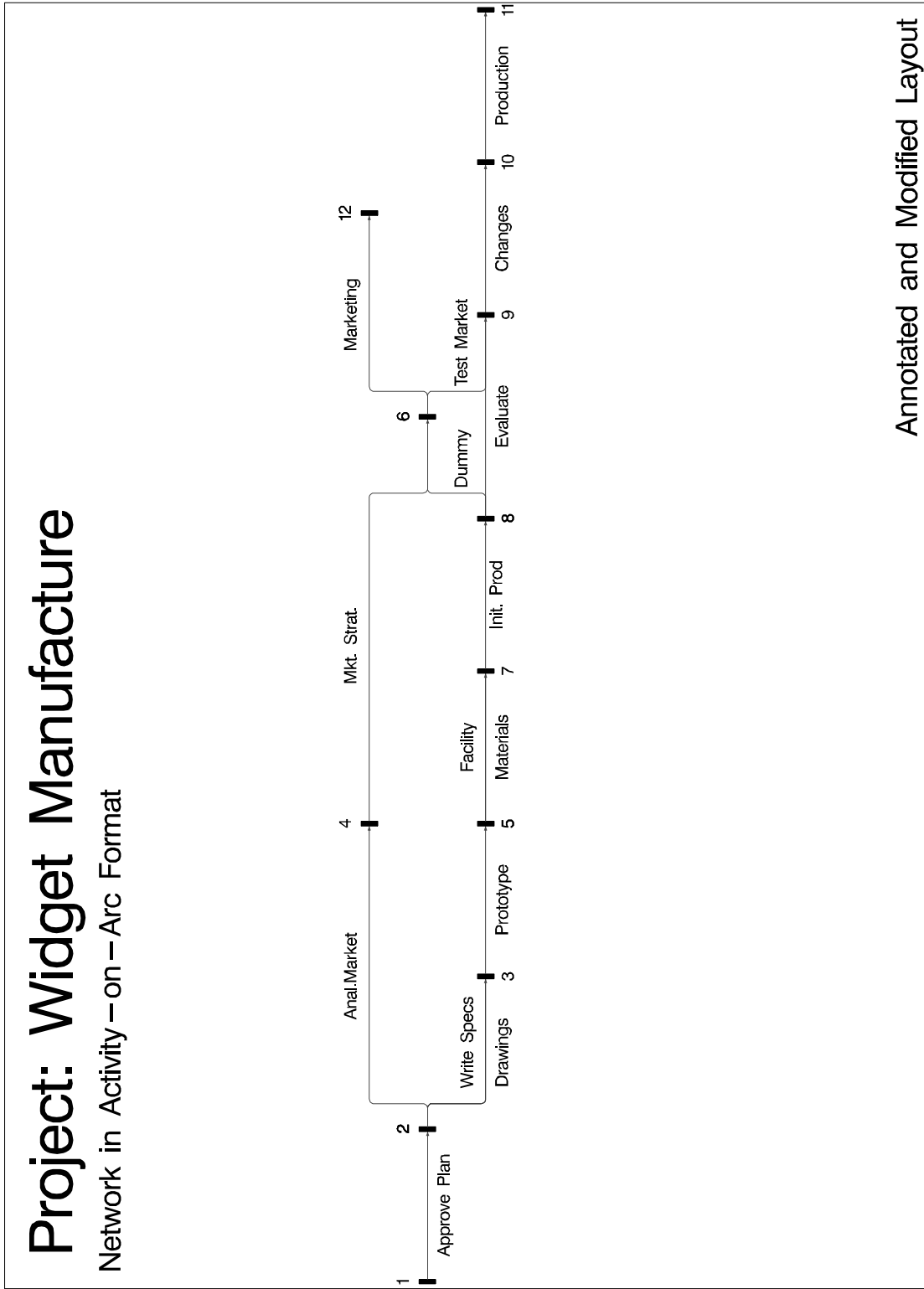
```
x=11.5; y=.8; text='Materials'; output;
x=14.5; y=.9; text='Init. Prod'; output;
x=13.5; y=3.4; text='Mkt. Strat.'; output;
x=18; y=.8; text='Evaluate'; output;
x=21.5; y=.8; text='Changes'; output;
x=24.5; y=.8; text='Production'; output;
x=20; y=3.4; text='Marketing'; output;
position=6;
x=16.6; y=1.5; text='Dummy'; output;
x=18.6; y=1.5; text='Test Market'; output;
;

data anno;
  set anno1 anno2;
run;

footnote j=r 'Annotated and Modified Layout ';
pattern1 v=s c=red;

proc netdraw graphics data=netin anno=anno;
  actnet / nodefid
    nolabel
    boxwidth=1
    pcompress
    novcenter
    vmargin=20
    xbetween=10;
run;
```


Output 7.17.2. Activity-on-Arc Format: Annotated Diagram



Example 7.18. Branch and Bound Trees

This example illustrates a nonstandard use of PROC NETDRAW. The TREE option in PROC NETDRAW is used to draw a branch and bound tree such as one that you obtain in the solution of an integer programming problem. Refer to Chapter 3, “The LP Procedure” (*SAS/OR User’s Guide: Mathematical Programming*) for a detailed discussion of branch and bound trees. The data used in this example were obtained from one particular invocation of PROC LP.

The data set NET (created in the following DATA step) contains information pertaining to the branch and bound tree. Each observation of this data set represents a particular iteration of the integer program, which can be drawn as a node in the tree. The variable `node` names the problem. The variable `object` gives the objective value for that problem. The variable `problem` identifies the *parent* problem corresponding to each node; for example, since the second and the seventh observations have `problem` equal to ‘-1’ and ‘1’, respectively, it indicates that the second and the seventh problems are derived from the first iteration. Finally, the variable `_pattern` specifies the pattern of the nodes based on the status of the problem represented by the node.

```
data net;
  input node problem cond $10. object;
  if cond="ACTIVE"          then _pattern=1;
  else if cond="SUBOPTIMAL" then _pattern=2;
  else                      _pattern=3;
  datalines;
1      0      ACTIVE      4
2     -1      ACTIVE      4
3      2      ACTIVE      4
4     -3      ACTIVE 4.3333333
5      4 SUBOPTIMAL      5
6      3 FATHOMED 4.3333333
7      1      ACTIVE      4
8     -7      ACTIVE      4
9     -8 FATHOMED 4.3333333
10     8 FATHOMED 4.3333333
11     7      ACTIVE      4
12   -11 FATHOMED 4.3333333
13    11 FATHOMED      4.5
;
```

The next DATA step (which creates the data set LOGIC) uses this child-parent information to format the precedence relationships as expected by PROC NETDRAW. Next, the two data sets are merged together to create the Network input data set (BBTREE) for PROC NETDRAW. The ID variable in the data set BBTREE is formatted to contain both the iteration number and the objective value.

Finally, PROC NETDRAW is invoked with the TREE, ROTATE, and ROTATETEXT options to produce a branch and bound tree shown in [Output 7.18.1](#). Note that the ROTATE and ROTATETEXT options produce a rotated graph with a top-down orientation.

```

/* set precedence relationships
   using child-parent information */
data logic;
  keep node succ;
  set net(firstobs=2);
  succ=node;
  node=abs(problem);
  run;

proc sort data=logic;
  by node;
  run;

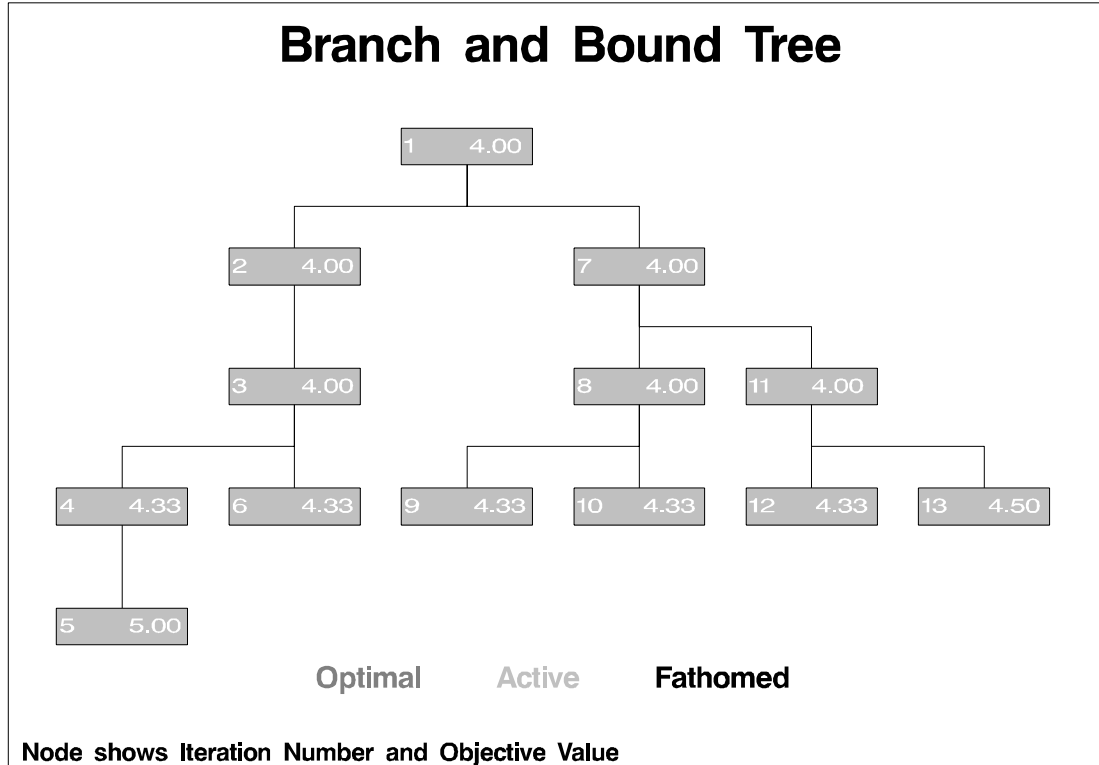
/* combine the logic data and the node data */
/* set ID values */
data bbtree;
  length id $ 9;
  merge logic net; by node;
  if node < 10 then id=put(node,1.)||put(object,f8.2);
  else id=put(node,2.)||put(object,f7.2);
  run;

goptions ftext=swissb border;
pattern1 v=s c=green;
pattern2 v=s c=red;
pattern3 v=s c=blue;

title j=c 'Branch and Bound Tree';
title2 ' ';
footnote1 h=1.2 j=c c=red 'Optimal '
          c=green ' Active '
          c=blue ' Fathomed ';
footnote2 ' ';
footnote3 ' Node shows Iteration Number and Objective Value ';
proc netdraw data=bbtree graphics out=bbout;
  actnet /activity=node
         successor=succ
         id=(id)
         nodefid
         nolabel
         ctext=white
         coutline=black
         carcs=black
         xbetween=15
         ybetween=3
         font=swiss
         compress
         rectilinear
         tree
         rotate
         rotatetext
         arrowhead=0
         htext=2;
run;

```

Output 7.18.1. Branch and Bound Tree



In the next invocation, PROC NETDRAW uses a modified layout of the nodes to produce a diagram where the nodes are aligned according to the iteration number. The following program uses the Layout data set produced in the previous invocation of PROC NETDRAW. The same y coordinates are used; but the x coordinates are changed to equal the iteration number. Further, the ALIGN= specification produces a time axis that labels each level of the diagram with the iteration number. Each node is labeled with the objective value. The resulting diagram is shown in [Output 7.18.2](#).

```

data netin;
  set bbout;
  if _seq_ = 0; drop _seq_ ;
  _x_ = _from_;
  id = substr(id, 3);
run;

goptions rotate=landscape;
title          'Branch and Bound Tree';
title2 h=1.5  'Aligned by Iteration Number';
footnote1 h=1.2 j=c c=red  'Optimal      '
          c=green  '          Active      '
          c=blue   '          Fathomed   ';

footnote2 ' ' ;
footnote3 j=1 ' Node shows Objective Value ' ;
pattern1 v=e c=green;
pattern2 v=e c=red;
pattern3 v=e c=blue;
proc netdraw data=netin graphics;

```

```
actnet /id=(id)
      ctext=black
      carcs=black
      align = _from_
      frame
      pcompress
      rectilinear
      arrowhead=0
      nodefid
      nolabel
      htext=2.5
      xbetween=8;

run;
```

Output 7.18.2. Branch and Bound Tree: Aligned by Iteration Number

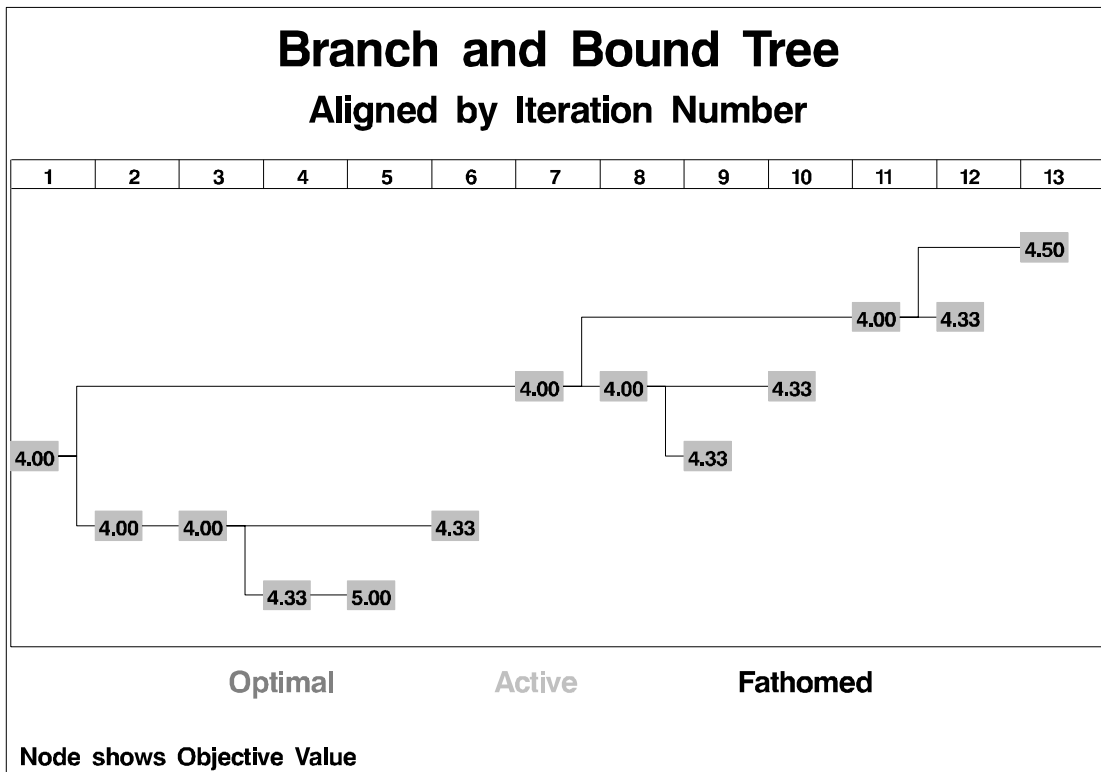


Table 7.19. (continued)

Option	10	11	12	13	14	15	16	17	18
PATTERN=			X						
PCOMPRESS	X	X	X	X	X	X	X	X	X
RECTILINEAR			X			X			X
REFBREAK	X								
ROTATE									X
ROTATETEXT									X
SEPARATEARCS	X	X		X	X				
SEPARATESONS						X			
SUCCESSOR=	X	X	X	X	X	X	X	X	X
TIMESCALE	X	X							
TREE						X			X
USEFORMAT							X		
VMARGIN=	X		X				X	X	
XBETWEEN=			X			X		X	X
YBETWEEN=			X	X	X	X		X	X
ZONE=		X					X	X	
ZONEPAT		X							
ZONESPACE		X							

References

Even, S. (1979), *Graph Algorithms*, Rockville, MD: Computer Science Press Inc.

Chapter 8

The Projman Application

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Chapter 8

The Projman Application

Overview

The Projman application is a user-friendly graphical user interface for performing [project management](#) with the SAS System. Through the use of an interactive Gantt chart window provided by the [PM procedure](#), you can easily create and manage multiple projects. For more information, see [Chapter 3, “The PM Procedure.”](#)

Projman is accessed by invoking the [projman command](#) in the SAS windowing environment, or by selecting **Solutions->Analysis->Project Management** from the primary SAS menu. When you invoke Projman, the [Projman Window](#) is displayed. This window is the primary window for accessing the functionality of the application. See the “[Projman Window](#)” section on page 726 for more information.

Projman enables you to define multiple projects, information about which is stored in a [project dictionary data set](#). For more information about this data set, see the “[PROJDICT= Option](#)” section, which follows. To access the data associated with a project, you use the [Project Information window](#). This window provides access to interfaces for defining data corresponding to activities, calendars, holidays, resources, and workshifts. See the “[Project Information Window](#)” section on page 730 for more information.

Projman also provides a variety of project [reports](#). These reports include Gantt charts, network diagrams, calendars, and tabular listings, as well as resource usage and cost reports. You can easily modify any of the standard reports to add your own personalized reports to the application. For more information on reports, see the “[Reports Window](#)” section on page 753.

For general information about project management, consult [Appendix A, “Glossary of Project Management Terms,”](#) .

Projman Command

The **projman** command supports two options:

- **PROJDICT=**
- project name

PROJDICT= Option

The **PROJDICT=** option is used to specify the location of the Projman project dictionary data set. The project dictionary data set stores the definition of each project created with the Projman application.

Valid values for the option are a two-level SAS data set name (that is, `<library>.<dsname>`, where `<library>` is a currently defined SAS libname and `<dsname>` is a valid SAS data set name).

If the data set specified with the `PROJDICT=` option does not exist, Projman attempts to create a new project dictionary data set at that location. If the data set already exists and it is not a valid project dictionary data set, Projman uses the default project dictionary data set location, `SASUSER.PROJDICT`.

Project Name Option

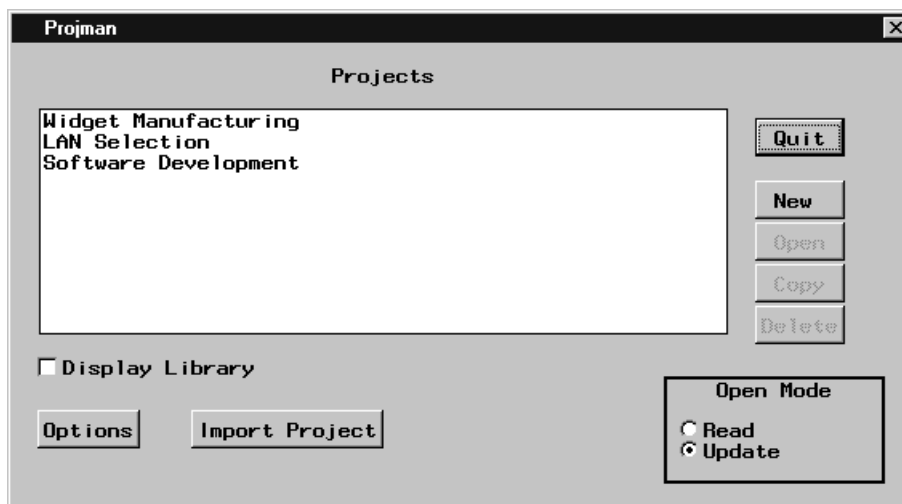
The Project Name option can be used to indicate a project that should be [opened](#) automatically when Projman is started. If the project does not exist, Projman produces a warning message.

To specify project names that contain multiple adjacent blanks (that is, “Project _ _ _ ABC”), enclose the name in double quotes.

Projman Window

The Projman Window is the initial window opened by the Projman application. When you start the application, all currently defined projects are listed in this window. To view an existing project, select the desired name in the project list and click **Open**. Projects can be opened with either *read* or *update* access.

When a new or existing project is opened, a [Project Information window](#) is displayed. Individual project data can be manipulated from that window. For more information, see the “[Project Information Window](#)” section on page 730.



Project List

The project list contains a list of all projects that are defined to the application.

Quit

Pressing the **Quit** button exits the Projman application. If projects are open with [update](#) access and changes have been made, you are prompted to save changes.

New

Pressing the **New** button creates a new project and opens that project with [update](#) access. A default project name (Project n , where n is an integer) is automatically generated and added to the [project list](#). When creating a new project, you are prompted to select the library where the project data is to be stored. After you select a library, the [Project Information window](#) is opened. For more information on that window, see the “[Project Information Window](#)” section on page 730.

Open

Pressing the **Open** button opens the selected project with read or update access. The access level is determined by the current setting of the **Open Mode** option. In order to save modifications to a project, you must open the project with update access. While you have a project open with update access, other users are only able to obtain read access to that project.

Copy

Pressing the **Copy** button copies the selected project. When copying a project, you are prompted to select the library where the project data is to be stored. You are also required to specify a unique project name. The new project name automatically appears in the [project list](#).

Delete

Pressing the **Delete** button deletes the selected project. In order to delete a project, you must be able to obtain update access. In other words, no other user can have the project open with update access.

Display Library

This option is used to toggle the display of project library names within the [project list](#). The library name indicates the library reference to the SAS data library where a particular project’s data is stored. If a project’s library reference is not defined, Projman is unable to open the project.

Options

When this button is pressed, the [Projman Options window](#) is displayed. For information on this window, see the “[Projman Options Window](#)” section on page 728.

Import Project

When this button is pressed, the [Import Project window](#) is opened. For information on this window, see the “[Import Project Window](#)” section on page 729.

Open Mode

The **Open Mode** option is used to specify whether projects are to be opened with read or update access. When a project is opened with read access, you may modify a *working* copy of the project data, but you are unable to save those changes when the project is closed (although you can use the **Save As** feature to save the modified project as a different project).

When a project is opened with update access, no other Projman session can open that same project with update access; however, read access is available. It is necessary to use update access if you want to save changes to the current project.

For different users to have simultaneous read access to the same project, SAS/SHARE software is required. Note that only one user can have update access to a particular project at a particular time. Access level does not affect the ability to produce project reports.

Projman Options Window

The Projman Options window enables you to manipulate options that control the behavior of the Projman application.

User Name

The **User Name** field can be used to specify the user's name, which is used to indicate who last modified a project. Modification information appears in the [Project Schedule Summary](#) window. For information on that window, see the "[Project Schedule Summary Window](#)" section on page 731.

Device Driver

The **Device Driver** field can be used to specify the name of the device driver that is to be used when printing reports. You can also indicate whether or not to use this device as a "target" device when reports are shown on the screen. In other words, the graphics output on the screen emulates the characteristics of the device listed in the **Device Driver** field.

Default Scheduling Options

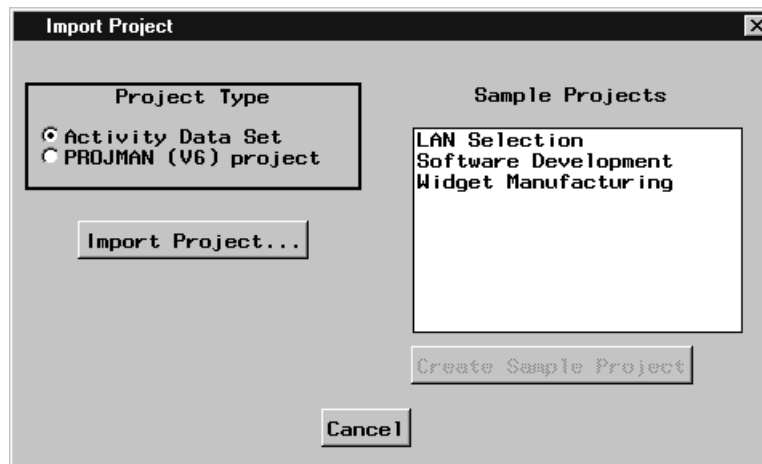
The **Default Scheduling Options** enable you to set default values for the project's **duration unit**, **day start**, and **day length** parameters. Note that changing the values of these options does not affect projects that already exist.

Automatically open Activities Window when opening projects.

If this option is selected, a project's **Activities window** (an interactive Gantt chart window provided by the **PM procedure**) automatically opens when the project is opened. For more information, see the “**PM Window**” section on page 732.

Import Project Window

The Import Project window enables you to import external project data or create sample projects.



Activity Data Set

When this option is selected and the **Import Project...** button is pressed, the **Import Activity Data Set window** is opened. For more information, see the “**Import Activity Data Set Window**” section on page 781.

PROJMAN (V6) project

When this option is selected and the **Import Project...** button is pressed, you are presented with a list of Version 6 Projman projects to import.

Import Project...

Depending upon the setting of **Project Type** as **Activity data set** or **PROJMAN (V6) project**, pressing this button commences the appropriate import process.

Sample Projects

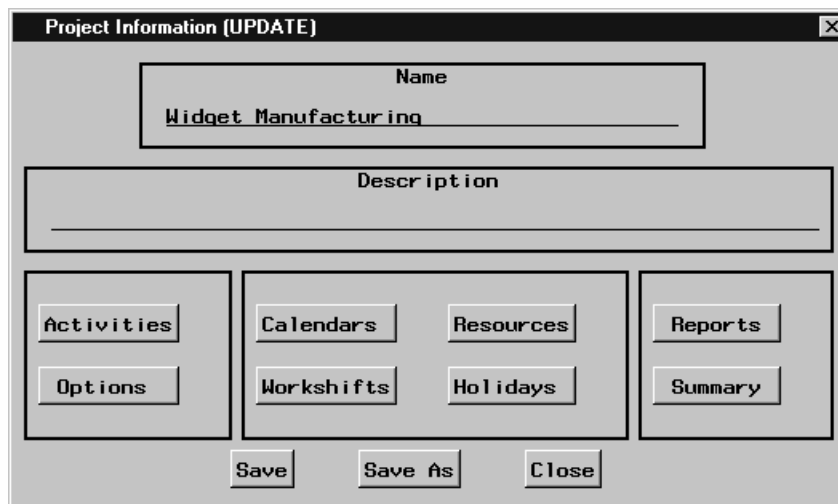
This list displays the sample projects that are currently available with the Projman application. Make the desired selection and use the **Create Sample Project** button to create a sample project.

Create Sample Project

Use this button to create the sample project that is currently selected in the [Sample Projects](#) list.

Project Information Window

The Project Information window is initially displayed when a project is opened for read or update. The access control level is indicated in the window title. In this window, you can edit the project name and description as well as access windows for specifying project data and producing reports.



Name

The **Name** field is used to specify the name of the project. Project names must be unique. A longer description can be given in the **Description** field.

Description

The **Description** field is provided to give the opportunity for storing a short description of the project. A description is purely optional and is used for identification purposes only.

Activities

When this button is selected, the **PM window** (an interactive Gantt Chart provided by the **PM procedure**) displays the current project structure and schedule. Within this window, activities can be added and deleted and corresponding data can be modified. For more information, see the “**PM Window**” section on page 732.

Options

This selection is used to access a window for setting project **scheduling options**, as well as a window for adding variables to the Activity data set. For more information on project scheduling options, see the “**Schedule Options Window**” section on page 746.

Calendars

When this button is pressed, the [Calendars window](#) is opened. For information on this window, see the “[Calendars Window](#)” section on page 733.

Holidays

When this button is pressed, the [Holidays window](#) is opened. For information on this window, see the “[Holidays Window](#)” section on page 735.

Resources

When this button is pressed, the [Resources window](#) is opened. For information on this window, see the “[Resources Window](#)” section on page 738.

Workshifts

When this button is pressed, the [Workshifts window](#) is opened. For information on this window, see the “[Workshifts Window](#)” section on page 744.

Reports

When this button is pressed, the [Reports window](#) is opened. For information on this window, see the “[Reports Window](#)” section on page 753.

Summary

When this button is pressed, the [Project Schedule Summary window](#) is opened. For information on this window, see the “[Project Schedule Summary Window](#)” section on page 731.

Project Schedule Summary Window

This window displays summary information for the different project schedules that have been computed. In addition to the start and finish times for these schedules, the [duration](#) and the [percent completion](#) of the project are also displayed. Note that these values correspond to the Resource Schedule of the project if [resource-constrained scheduling](#) was performed; otherwise, they correspond to the Early Schedule of the project.

This window also indicates the dates when the project was created and last modified as well as the user that last modified the project.

Project Schedule Summary

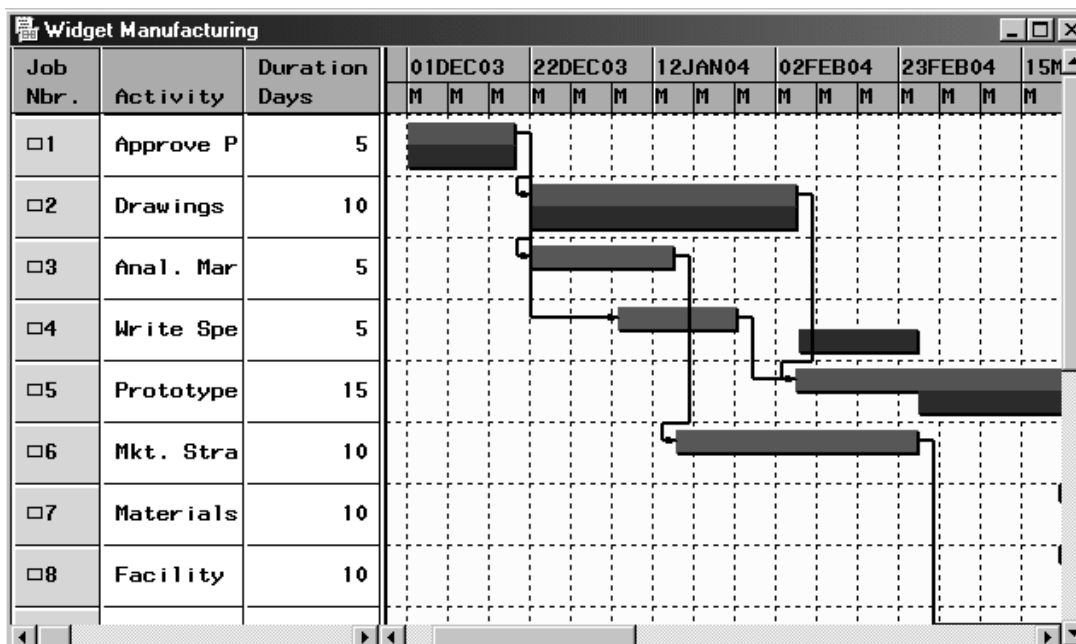
	Start	Finish	Duration (Days)	Percent Completed
Actual				
Baseline			66	0
Early	01DEC2003:08:00:00	17AUG2004:15:59:59		
Late	02JUL2003:08:00:00	18AUG2004:07:59:59		
Resource	01DEC2003:08:00:00	07SEP2004:15:59:59		
Time Now Date				
[Empty Field]				
Created	Last Modified		Last Modified By	
10JAN2003:15:03:52	10JAN2003:15:09:37		John Smith	

[Close]

PM Window

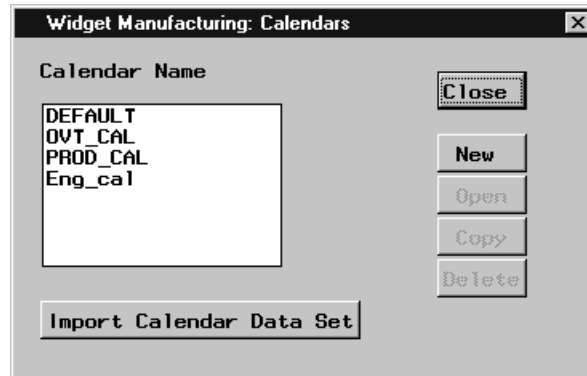
The PM window (also referred to as the Activities window) is an interactive Gantt chart window provided by the [PM procedure](#). Within Projman, this window is used to manipulate data corresponding to the project activities. This data includes names, durations, precedence relationships, calendars, resource requirements, progress information, and baseline schedules, as well as user-defined identification fields.

While the PM window is open, all other Projman application windows are inactive. To access options that control the manner in which the PM window schedules activities, press the [Options](#) button on the [Project Information window](#) before opening the PM window. For additional information on the PM window, see [Chapter 3, "The PM Procedure."](#)



Calendars Window

The Calendars window lists all of the [calendars](#) that have been defined for the project. From this window, you can create, edit, copy, and delete calendar definitions. Once defined, calendars can be assigned to activities as well as resources. You can define as many individual calendars as you want. Note that some actions in this window are disabled if they are not valid.



Calendar List

This list contains all of the calendars that are defined for the project. By selecting an item in this list, you can manipulate the selected item by pressing the [Open](#), [Copy](#), or [Delete](#) buttons. The [New](#) button can always be used to add a new item to the list.

New

When this button is pressed, a new calendar is created and displayed in an [Edit Calendar window](#) for editing.

Copy

When this button is pressed, the selected calendar is copied and displayed in an [Edit Calendar window](#) for editing. If no calendar is selected, this option is disabled.

Open

When this button is pressed, the selected calendar is displayed in an [Edit Calendar window](#) for editing. If no calendar is selected, this option is disabled.

Delete

When this button is pressed, the selected item in the [calendar list](#) is deleted. A secondary window is opened to confirm the deletion. Deletions are irreversible unless the project is closed without saving the current changes. If no calendar is selected, this option is disabled.

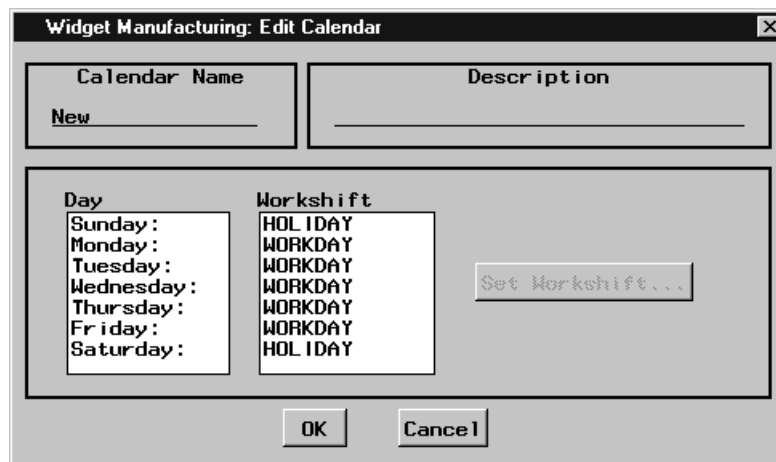
Import Calendar Data Set

When this button is pressed, a [window](#) is displayed for importing a [CALENDAR data set](#). For information on this window, see the “[Import Calendar Data Set Window](#)” section on page 788. The import data set is required to be in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For information on the [CALENDAR data set](#), see the “[CALEDATA Data Set](#)” section on page 100.

Edit Calendar Window

This window enables you to create and modify calendar definitions. You can specify a calendar name and description as well as choose the [workshifts](#) for each day of the work week.

Calendar names can take either character or numeric values, but they must be unique. If a calendar is defined with the name Default, every activity in the project will follow that calendar unless the activity has a specific calendar associated with it.



Calendar Name

The **Calendar Name** field is used to specify the name of the calendar. The calendar name can be either character or numeric, but it must be unique. This name is the value that will be used to assign calendars to activities and resources. A longer description can be given in the [Description](#) field.

Description

The **Description** field enables you to store a short description about the calendar. A description is purely optional and is used for identification purposes only.

Workshift Table

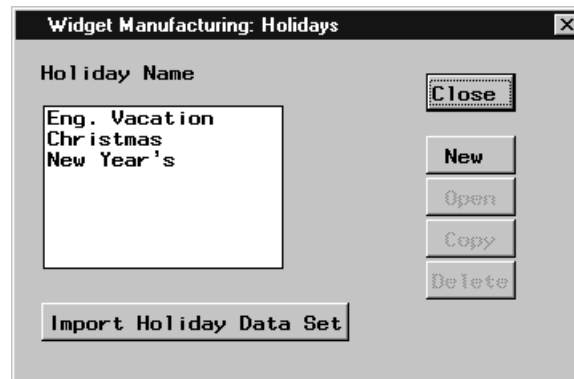
The Workshift table indicates the [workshifts](#) that have been assigned to each day of the week. By default, Monday through Friday are working days (identified by the WORKDAY workshift), while Saturday and Sunday are nonworking days (identified by the HOLIDAY workshift). To change the workshift associated with a particular day or days, simply select that day (days) by selecting the corresponding workshift (workshifts) in the table and press the [Set Workshift...](#) button.

Set Workshift...

When the **Set Workshift...** button is pressed, a window is opened that displays all of the workshifts currently defined for the project. By selecting different workshifts, you can change the highlighted values in the [Workshift table](#). When the desired selection has been made, press the **Close** button to close the window.

Holidays Window

The Holidays window lists all of the [holidays](#) that have been defined for the project. From this window, you can create, edit, copy and delete holiday definitions. You can define as many individual holidays as you want. Note that some actions in this window are disabled if they are not valid.



Holiday List

This list contains all of the holidays that are defined for the project. By selecting an item in this list, you can manipulate the selected item by pressing the **Open**, **Copy**, or **Delete** buttons. The **New** button can always be used to add a new item to the list.

New

When this button is pressed, a new holiday is created and displayed in an [Edit Holiday window](#) for editing.

Copy

When this button is pressed, the selected holiday is copied and displayed in an [Edit Holiday window](#) for editing. If no holiday is selected, this option is disabled.

Open

When this button is pressed, the selected holiday is displayed in an [Edit Holiday window](#) for editing. If no holiday is selected, this option is disabled.

Delete

When this button is pressed, the selected item in the [holiday list](#) is deleted. A secondary window is opened to confirm the deletion. Deletions are irreversible unless the project is closed without saving any changes. If no holiday is selected, this option is disabled.

Import Holiday Data Set

When this button is pressed, a [window](#) is displayed for importing a [HOLIDAY data set](#). For information on this window, see the “[Import Holiday Data Set Window](#)” section on page 789. The import data set is required to be in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For information on the [HOLIDAY data set](#), see the “[HOLIDATA Data Set](#)” section on page 101.

Edit Holiday Window

This window enables you to create and modify [holiday](#) definitions. You can specify a holiday name and description as well as a start date, finish date, and the duration (or length) of the holiday. Additionally, you can indicate the calendar or calendars that the holiday is to be associated with.

Holiday names can take either character or numeric values. A start date is always required when defining a holiday.

The screenshot shows a dialog box titled "Widget Manufacturing: Edit Holiday". It features a "Holiday Name" field containing "New" and a "Description" field. Below these is a "Dates" section with "Start:" and "Finish:" labels, each followed by a dropdown menu. The "Start:" dropdown is set to "-REQUIRED-" and the "Finish:" dropdown is set to "-NONE-". To the right of the "Dates" section is a "Duration" field with the text "(in Days)" and a "Calendars..." button. At the bottom of the dialog are "OK" and "Cancel" buttons.

Holiday Name

The **Holiday Name** field is used to specify the name of the holiday. The holiday name can be either character or numeric. A longer description can be given in the [Description](#) field.

Description

The **Description** field enables you to store a short description about the holiday. A description is purely optional and is used for identification purposes only.

Holiday Start Date

The **Holiday Start Date** is used to indicate the calendar date that represents the start of the holiday. The start date is required. The value can be entered with either a DATEw. (that is, 01MAY2004) or a DATETIMEw. (that is, 01MAY2004:08:30:00) format. Alternatively, by pressing the **Start:** button, you can access an [Edit Date window](#) to specify the desired value.

Holiday Finish Date

The **Holiday Finish Date** can be used to indicate the calendar date that represents the finish of the holiday. The finish date is not required; however, if not specified, the holiday will last only one [duration unit](#) (as defined for the project) unless the length of the holiday is specified in the **Duration** field. The finish date value can be entered with either a DATEw. (that is, 01MAY2004) or a DATETIMEw. (that is, 01MAY2004:16:59:59) format. Alternatively, by pressing the **Finish:** button, you can access an [Edit Date window](#) to specify the desired value.

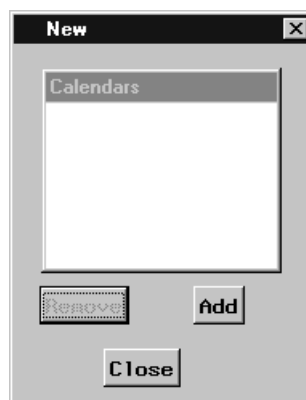
Duration

The **Duration** field can be used to specify the length of the holiday. Duration values are specified in the units of the project's [duration unit](#). The duration is optional, but it is assumed to be 1 if the [holiday finish](#) date is not provided. If the holiday finish date is specified, the duration is ignored.

Calendars...

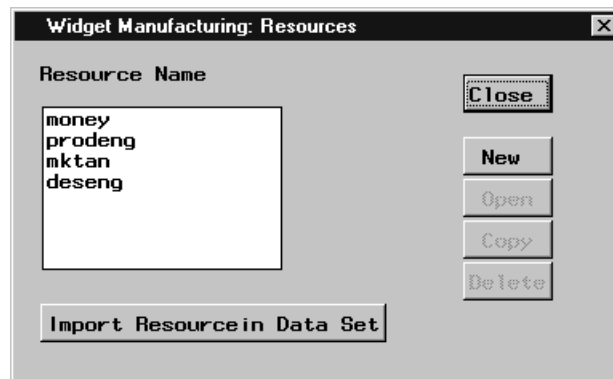
Pressing the **Calendars...** button opens a window for indicating which project calendar or calendars the holiday is to be associated with. If no calendars are specified in the list, the holiday is assigned to *all* calendars.

The Calendars window contains a list of calendars that the current holiday is assigned to. To remove calendars, simply select the calendar to be removed and press the **Remove** button. To add calendars to the list, press the **Add** button. A list of all calendars is displayed and if you select individual calendar entries, they are added to the holiday's calendar assignments.



Resources Window

The Resources window lists all of the resources that have been defined for the project. From this window, you can create, edit, copy and delete resource definitions. You can define as many individual resources as you want. Note that some actions in this window are disabled if they are not valid.



Resource List

This list contains all of the resources that are defined for the project. By selecting an item in this list, you can manipulate the selected item by pressing the **Open**, **Copy**, or **Delete** buttons. The **New** button can always be used to add a new item to the list.

New

When this button is pressed, a new resource is created and displayed in an [Edit Resource window](#) for editing.

Copy

When this button is pressed, the selected resource is copied and displayed in an [Edit Resource window](#) for editing. If no resource is selected, this option is disabled.

Open

When this button is pressed, the selected resource is displayed in an [Edit Resource window](#) for editing. If no resource is selected, this option is disabled.

Delete

When this button is pressed, the selected item in the [resource list](#) is deleted. A secondary window is opened to confirm the deletion. Deletions are irreversible unless the project is closed without saving any changes. If no resource is selected, this option is disabled.

Import Resourcein Data Set

When this button is pressed, a [window](#) is displayed for importing a [RESOURCEIN](#) data set. For information on this window, see the “[Import Resourcein Data Set Window](#)” section on page 791. The import data set is required to be in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For information on the [RESOURCEIN](#) data set, see the “[RESOURCEIN= Input Data Set](#)” section on page 109.

Edit Resource Window

This window enables you to create and modify resource definitions. You can specify a resource name and description as well as indicate the resource type and priority. Actual, budgeted, and fixed resource costs can also be specified. In two secondary windows, you can define the availability profile and a list of substitute resources.

Resource names must be valid SAS variable names and must be unique.

Name

The **Name** field is used to specify the name of the resource. The resource name must be a valid SAS variable name and must be unique. A longer description can be given in the [Description](#) field.

Description

The **Description** field enables you to store a short description of the resource. A description is purely optional and is used for reporting purposes only.

Calendar

The **Calendar** field is used to specify the name of the [calendar](#) for the resource. Simply type the name of the desired calendar in the field and press **Enter**. If that calendar does not exist, you are asked if you would like for it to be created. If you respond affirmatively, a calendar (with default settings) is created and given the specified name. Calendars are modified by accessing the [Calendars window](#) for the project. For more information, see the “[Calendars Window](#)” section on page 733.

Resource Type

Resources are classified as either consumable or replenishable. A consumable resource is one that is used up by the job (such as bricks or money), while a replenishable resource becomes available again once a job using it has finished (such as laborers or machinery).

If the **For Aggregation Only** option is selected, this resource is used for [aggregation](#) rather than [resource-constrained scheduling](#). When a resource is defined as an aggregate resource, resource availability information is ignored.

Amount of Work

This selection indicates the amount of work that a particular resource is to perform on an activity (or the manner in which the resource affects an activity's duration). When the **Fixed by activity duration** option is selected, the resource works for a fixed duration, as specified for the activity; in other words, the activity's duration is not affected by changing the rate of the resource used by the activity. The **Drives activity duration** selection indicates that the activity's work value indicates the total amount of work required by the resource for that activity; such a resource is called a *driving* resource. The **Spans entire activity** selection indicates that the resource is to be a *spanning* resource; in other words, the resource is required to work throughout the activity's duration, no matter which resource is working on it. For example, an activity might require 10 percent of a "supervisor," or the use of a particular room, throughout its duration. For such an activity, the duration used for the spanning resource is computed after determining the span of the activity for all the other resources.

Resource Priority

You can use the horizontal slider to specify a resource priority value between 1 and 100. Lower numbers indicate higher priority. During resource-constrained scheduling, this number is used to order activities that are waiting for resources when the [primary scheduling rule](#) is specified as [resource priority](#). For information on scheduling rules, see the "[Scheduling Rules](#)" section on page 752.

Resource Cost

The **Cost** fields enables you to specify an actual, budgeted, and fixed cost value for each resource. These costs are optional and are used in cost calculations for resource cost reports.

Supplementary Resource Level

The **Supplementary Resource Level** field can be used to specify an amount of extra resource that is available for use throughout the duration of the project. This extra resource is used only if the activity cannot be scheduled without delaying it beyond its [late start](#) time.

Availability...

Pressing the **Availability...** button opens the [Availability window](#) for the current resource. From this window, you can define the availability profile for the resource. For more information, see the “[Availability Window](#)” section on page 741.

Alternates...

Pressing the **Alternates...** button opens the [Alternates window](#) for the current resource. From this window, you can define alternate (substitute) resources for the current resource. For more information, see the “[Alternates Window](#)” section on page 742.

Availability Window

This window enables you to specify the availability profile for the current resource. By adding records to the profile, you can indicate when the resource availability changes over time. By default, one record is added to the list to indicate an initial availability of one unit on January 1, 1960.

It is only necessary to add records for each change in the availability. Note that, for consumable resources, the availability amount represents the cumulative amount available to date.

Date	Amount
01JAN1960:00:00:00	1

Day

The horizontal slider is used to specify the desired day for adding an entry to the [availability profile](#).

Month

The horizontal slider is used to specify the desired month for adding an entry to the [availability profile](#).

Year

The horizontal slider is used to specify the desired year for adding an entry to the [availability profile](#).

Time

The horizontal slider is used to specify the desired time for adding an entry to the [availability profile](#). Note that times are based on a 24 hour clock (that is, 13:00=1 PM).

Available

The **Available** field is used to specify the desired available amount for adding (or updating) an entry to the [availability profile](#).

Availability Profile

The Availability Profile list indicates the amount of resource that is available to the project over time. To add or update records in the list, select the desired date, specify an [available](#) amount, and press the **Add/Update** button. Records in the list are sorted automatically by date. To delete records from the list, select the desired records and press the **Delete** button.

Add/Update

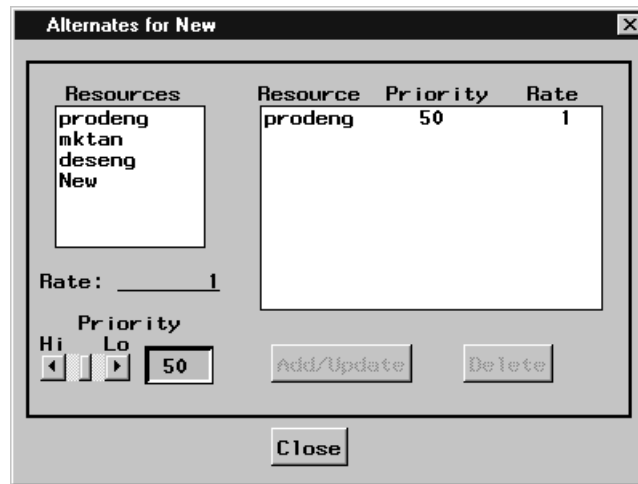
Pressing the **Add/Update** button adds or updates a record in the [availability profile](#) depending on the current date setting and the [available](#) amount specified. Records in the availability profile are sorted automatically by date.

Delete

Pressing the **Delete** button removes the currently selected records in the [availability profile](#). Note that deletions cannot be aborted unless changes to the resource are not saved.

Alternates Window

This window enables you to specify the alternates profile for the current resource. By adding records to the profile, you can indicate which resources and at what rate those resources can be substituted for the current resource. Alternate resources are purely optional, but they can be very helpful in reducing resource infeasibilities. Only resources of the same type (consumable or replenishable) can be substituted for one another.



Resources List

The Resources list contains all of the resources defined for the project that are of the same type (replenishable or consumable) as the current resource, as substitutions can only be made by like-typed resources. Selecting one or more resources in this list enables you to add records to the [alternates profile](#).

Rate

The **Rate** field is used to specify the rate of substitution for an alternate resource specification. For example, if resource Z is to be substituted for resource X with a substitution rate of 0.5, an activity that requires 1 unit of resource X could be completed with 0.5 units of resource Z.

Priority

The horizontal slider can be used to indicate a priority for an alternate resource specification. Lower numbers indicate higher priority. This priority is used to order the resources that are listed as alternates (substitutes) for the current resource.

Alternates Profile

The Alternates Profile indicates the resources that are eligible to be substituted for the current resource (if it should be unavailable during project scheduling). Records in this list are ordered by [priority](#) to indicate the order in which substitutions would be made, if needed. To add or update records in the list, select one or more resources in the [Resources list](#), specify the [rate](#) of substitution and the [priority](#), and press the [Add/Update](#) button. To delete records from the list, select the desired records and press the [Delete](#) button.

Add/Update

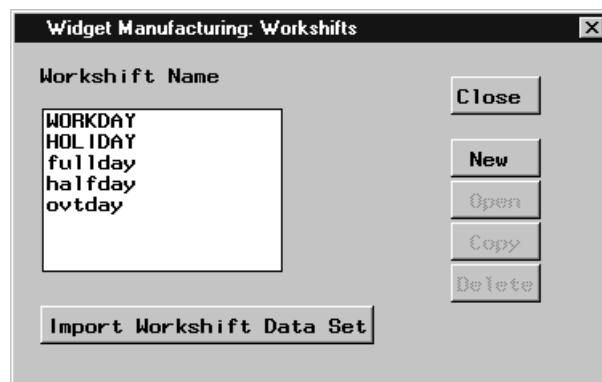
Pressing the [Add/Update](#) button adds or updates a record in the [alternates profile](#) depending on the current [resource](#), [rate](#), and [priority](#) settings.

Delete

Pressing the **Delete** button removes the currently selected records in the [alternates profile](#). Note that deletions cannot be aborted unless changes to the resource are not saved.

Workshifts Window

The Workshifts window lists all of the [workshifts](#) that have been defined for the project. From this window, you can create, edit, copy, and delete workshift definitions. You can define as many individual workshifts as you want. Note that some actions in this window are disabled if they are not valid.



Workshift List

This list contains all of the workshifts that are defined for the project. By selecting an item in this list, you can manipulate the selected item by pressing the **Open**, **Copy**, or **Delete** buttons. The **New** button can always be used to add a new item to the list.

New

When this button is pressed, a new workshift is created and displayed in an [Edit Workshift window](#) for editing.

Copy

When this button is pressed, the selected workshift is copied and displayed in an [Edit Workshift window](#) for editing. If no workshift is selected, this option is disabled.

Open

When this button is pressed, the selected workshift is displayed in an [Edit Workshift window](#) for editing. If no workshift is selected, this option is disabled.

Delete

When this button is pressed, the selected item in the [workshift list](#) is deleted. A secondary window is opened to confirm the deletion. Deletions are irreversible unless the project is closed without saving any changes. If no workshift is selected, this option is disabled.

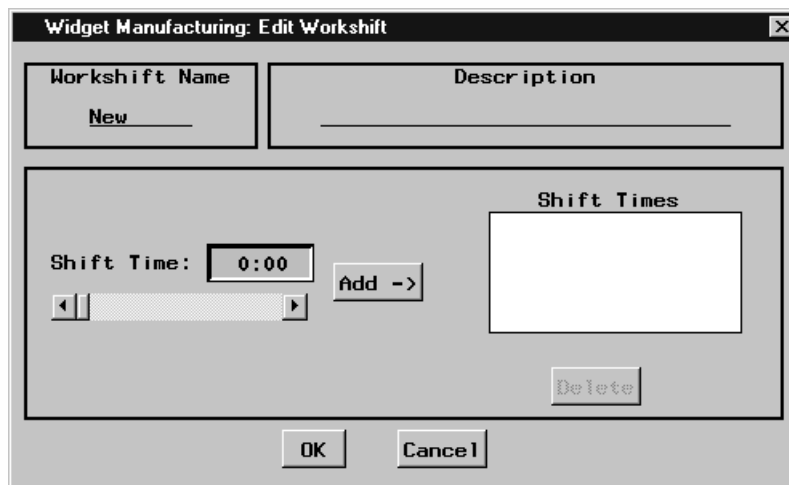
Import Workshift Data Set

When this button is pressed, a [window](#) is displayed for importing a [WORKSHIFT](#) data set. For information on this window, see the “[Import Workshift Data Set Window](#)” section on page 792. The import data set is required to be in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For information on the [WORKDAY](#) data set, see the “[WORKDATA Data Set](#)” section on page 99.

Edit Workshift Window

This window enables you to create and modify workshift definitions. You can specify a workshift name and description as well as define the on/off working times that make up the valid working periods within a single day.

Workshift names must be valid SAS variable names and must be unique.



Workshift Name

The **Workshift Name** field is used to specify the name of the workshift. The workshift name must be a valid SAS variable name and must be unique. A longer description can be given in the [Description](#) field.

Description

The **Description** field enables you to store a short description of the workshift. A description is purely optional and is used for identification purposes only.

Shift Time

The horizontal slider can be used to adjust the shift time. When the [Add ->](#) button is pressed, this value is added to the [Shift Times list](#). The values in the Shift Times list are sorted automatically. Note that times are based on a 24 hour clock (that is, 13:00=1 PM).

Add ->

When this button is pressed, the current **shift time** value is added to the **Shift Times list**. The values in the Shift Times list are sorted automatically.

Shift Times List

The Shift Times list contains the on/off working times that represent the workshift (workday) definition. Times can be added to the list by setting the **Shift Time** and pressing the **Add ->** button, while times are removed by selecting items in the list and pressing the **Delete** button. Times should be added to the Shift Times list in pairs that represent on/off working times. A valid workshift will have an even number of times in the list.

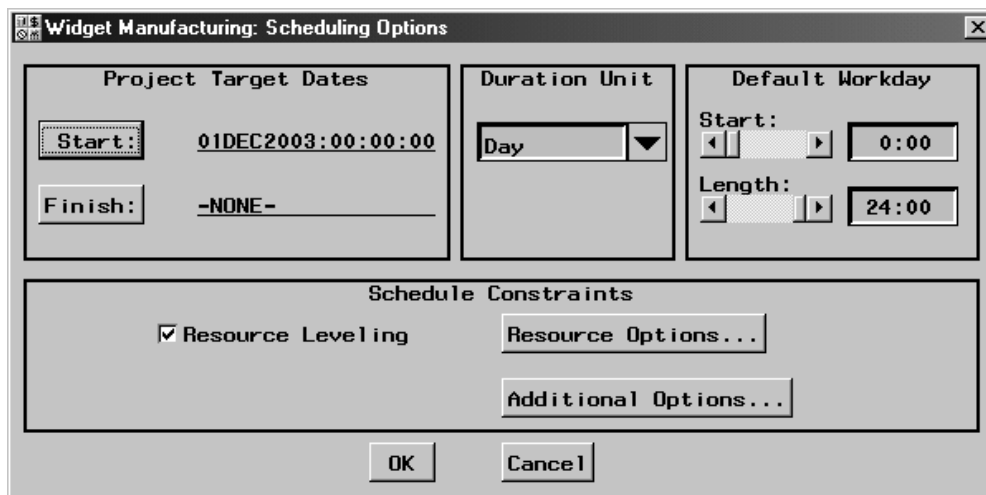
Delete

When this button is pressed, any times selected in the **Shift Times list** are deleted.

Schedule Options Window

This window enables you to set options that control the scheduling of the active project using the critical path method. These options are maintained separately for each project, and default values depend upon the data specified for the project. **Schedule Constraints** (such as resource leveling) can be enabled and disabled here. Secondary windows can be used to set additional options that are used to provide tighter control over the scheduling algorithm.

Some options are not available unless certain project data has been specified. For example, if no resources are defined, the **Resource Leveling** option is disabled. However, when resources are added to the project, this option is automatically enabled and selected.

**Project Start Date**

The **Project Start Date** is used to align the start of the project. This value can be entered with either a DATEw. (that is, 01MAY2004) or a DATETIMEw. (that is,

01MAY2004:08:30:00) format. Alternatively, by pressing the **Start:** button, you can access an [Edit Date window](#) to specify the desired value.

A [project finish date](#) can also be specified. If neither of these dates is specified, the project start date is automatically set to the current date upon initial scheduling.

Project Finish Date

The **Project Finish Date** is used to align the finish of the project. This value can be entered with either a DATEw. (that is, 01MAY2004) or a DATETIMEw. (that is, 01MAY2004:17:00:00) format. Alternatively, by pressing the **Finish:** button, you can access an [Edit Date window](#) to specify the desired value.

A [project start date](#) can also be specified. If neither of these dates is specified, the project start date is automatically set to the current date upon initial scheduling.

Duration Unit

The **Duration Unit** specifies the unit of time for the duration of each activity in the project. The following choices are available:

Second	Week
Minute	Month
Hour	Qtr
Day	Year
Weekday	

The default value is Day.

Workday Start

This option can be used to specify the start of the default workday. Values for this option correspond to a TIME5. (hh:mm) value, where hh is in hours and mm is in minutes. Use the horizontal slider to select the desired value. Note that times are based on a 24 hour clock (that is, 13:00=1 PM).

This option is ignored when the [duration unit](#) is specified as Month, Qtr, or Year.

Workday Length

This option can be used to specify the length of the default workday. Values for this option correspond to a TIME5. (hh:mm) value, where hh is in hours and mm is in minutes. Use the horizontal slider to select the desired value.

This option is ignored when the [duration unit](#) is specified as Month, Qtr, or Year.

Resource Leveling

The **Resource Leveling** option is used to indicate that the activities in the project are to be scheduled subject to the availability of required resources. If the active project contains resource data, this option is selected by default; otherwise, the option is disabled. To schedule a project without using resource constraints, simply deselect the **Resource Leveling** option.

Resource Options...

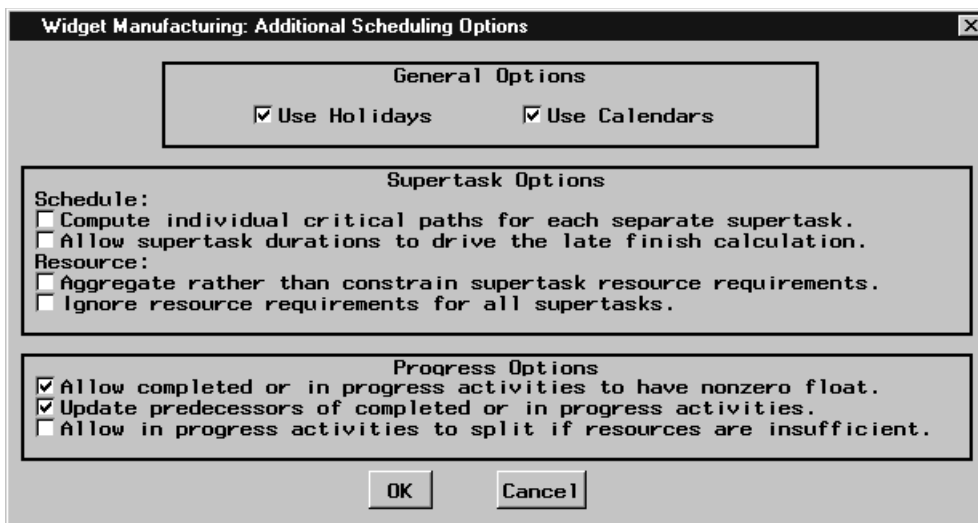
Pressing this button opens the [Resource Options window](#), which is used to set options to control the resource allocation algorithm. For more information on this window, see the “[Resource Options Window](#)” section on page 750.

Additional Options...

Pressing this button opens the [Additional Options window](#), which is used to set basic options that control the project scheduling algorithm. For more information on this window, see the “[Additional Options Window](#)” section, which follows.

Additional Options Window

This window enables you to control general scheduling options, such as the use of holidays and calendars. There are also controls for supertask and progress options. Note that some of these options are disabled if the required project data are not present. The settings of these options are established and maintained for each project.



Additional Options

Use Holidays

When this option is activated, [holiday](#) definitions are considered during scheduling; otherwise, all holidays are ignored. Note that this option is disabled if no holidays have been defined. This option is automatically activated when holidays are initially created.

Use Calendars

When this option is activated, [calendar](#) definitions are considered during scheduling; otherwise, all calendars are ignored. Note that this option is disabled if no calendars have been defined. This option is automatically activated when calendars are initially created.

Compute individual critical paths for each separate supertask.

When this option is selected, the scheduling algorithm calculates a separate **critical path** for each **supertask** in the project.

By default, the project's **early finish** time is treated as the starting point for the calculation of the **backward pass** (which calculates the late start schedule). The **late finish** time for each supertask is then determined during the backward pass on the basis of the precedence constraints. If a **target date** is placed on the finish time of a supertask, the late finish time of the supertask is further constrained by this value. However, when this option is activated, the scheduling algorithm requires that the late finish time of each subtask be less than or equal to the early finish time of the supertask.

Allow supertask durations to drive the late finish calculation.

When this option is activated, the scheduling algorithm uses the specified **supertask duration** to compute the maximum allowed **late finish** time for each supertask. Otherwise, the maximum allowed late finish time is determined by the supertask span, as computed from the span of all the **subtasks** of the supertask.

Aggregate rather than constrain supertask resource requirements.

When this option is selected, the resource requirements for all **supertasks** are used only for aggregation purposes and not for **resource-constrained scheduling**.

Ignore resource requirements for all supertasks.

When this option is activated, the resource requirements for all **supertasks** are ignored.

Allow completed or in-progress activities to have nonzero float.

When this option is selected, the scheduling algorithm allows activities that are completed or in progress to have nonzero float. For more information on float, see **total float** and **free float** in Appendix A, "Glossary of Project Management Terms." By default, all completed or in-progress activities have zero float.

Update predecessors of completed or in-progress activities.

When this option is selected, the scheduling algorithm assumes automatic completion (or start) of activities that are **predecessors** to activities already completed (or in progress). For example, if activity B is a successor of activity A, and B has an **actual start** time (or **actual finish** time or both) specified while A has no actual start or actual finish time, then the algorithm assumes that A must have already finished. Activity A is assigned an actual start time and an actual finish time consistent with the precedence constraints.

Allow in-progress activities to split if resources are insufficient.

When this option is activated, the scheduling algorithm allows activities that are in progress at the **timenow date** to be split if they cause resource infeasibilities. During resource allocation, any activities with **early start** values less than the timenow date are scheduled even if there are not enough resources. This is true even for activities

that are in progress. This option permits an activity to be split into two segments at the timenow date, allowing the second segment of the activity to be scheduled later when resource levels permit. Note that activities with a [target date alignment type](#) of mandatory start or mandatory finish are not allowed to be split; also, activities without resource requirements are not split.

Resource Options Window

The Resource Options window enables you to control several aspects of the resource scheduling algorithm. When activities are scheduled subject to the limited availability of resources, it is quite possible that a feasible schedule does not exist or cannot be found. The resource options available here can be used to control and manipulate the resource allocation process. In some cases, these options might enable the algorithm to find a feasible schedule or to shorten the existing schedule.

These options settings are established and maintained for each project. Note that some options have no effect if the appropriate data has not been specified.

Resource Options

Resource Cutoff Date

The **Resource Cutoff Date** field can be used to specify a cutoff date for resource leveling. When this date is specified, the [scheduled start](#) and [finish](#) for activities that would occur after the cutoff date are set to missing (empty). This value can be entered with either a DATEw. (that is, 01MAY2004) or a DATETIMEw. (that is, 01MAY2004:17:00:00) format. Alternatively, by pressing the **Date:** button, you can access an [Edit Date window](#) to specify the desired value.

Maximum Activity Delay

The **Default Maximum Activity Delay** field can be used to specify the maximum amount of time by which any activity in the project can be delayed due to lack of resources. This value acts as a default for all project activities, while individual values can be specified for each separate activity. The default value for this option is +INFINITY.

Resource Usage Observations

The maximum number of resource observations sets an upper limit on the number of observations that the resource usage output data set can contain. The default value is 1000. Use the horizontal slider to increase this limit. The frequency indicates the time interval at which observations are added to the data set. Use the combo box to select the desired time interval.

Limit activity resource delays.

When this option is activated, the **maximum activity delay** and each activity's **delay** values (if specified) are used to control activity schedule slippage when performing resource leveling; otherwise, the values are ignored and activity schedules are allowed to slip indefinitely.

Use resource calendars.

When this option is activated, resource calendars (if specified) are used to determine on/off work periods for resources; otherwise, all resource calendars are ignored.

Allow activity splitting.

When this option is activated, activities are allowed to be split into segments during resource allocation. The **maximum number of segments** and the **minimum segment duration** can be specified for each activity to control the extent of the splitting.

Use alternate resources.

When this option is activated, alternate resources (if specified) are used; otherwise, they are ignored.

Allow designated resources to drive activity durations.

This option is used to activate resource-driven durations, provided that resources have been defined as *driving* resources and work rates have been specified for the activities.

Allow multiple resources to be allocated independently.

When this option is selected, each resource can be scheduled separately for each activity during resource allocation; otherwise, all resources (required by an activity) must be available before work on the activity can be scheduled. If this option is selected, each resource is scheduled independently of the others. This may cause an activity's schedule to be extended if its resources cannot all start at the same time.

Continue scheduling even when resources are insufficient.

When this option is selected, the scheduling algorithm continues to schedule activities even when resources are insufficient. By default, the algorithm stops (with a partial schedule) when it cannot find sufficient resources for an activity before the activity's latest possible start time (accounting for the activity's **delay** value or the **maximum activity delay** and using supplementary or alternate resources if necessary and if allowed). This option is equivalent to specifying infinite supplementary levels for all resources under consideration.

Require intersection of resource calendars for each activity.

When this option is selected, an activity can be scheduled only during periods that are common working times for all resource calendars (corresponding to the resources used by that activity) and the activity's calendar. Use this option with caution; if an activity uses resources that have mutually disjoint calendars, that activity can never be scheduled.

If this option is not specified and resources have independent calendars, then each resource is scheduled using its own calendar. Thus, an activity can have one resource working on a five-day calendar, while another resource is working on a seven-day calendar.

Allocate alternate resources before using supplementary levels.

This option indicates that the scheduling algorithm is to check for alternate resources before using supplementary resources. When this option is not selected, the algorithm uses supplementary levels first (if available) and alternate resources are used only if the supplementary levels are not sufficient.

Allow activities to be delayed before using supplementary levels.

When this option is selected, the scheduling algorithm waits until an activity's **late start** plus **delay** before it is scheduled using a supplementary level of resources. Otherwise, even if an activity has a nonzero value specified for delay, it can be scheduled using supplementary resources before late start plus delay.

Scheduling Rules

The primary scheduling rule is used to order the list of activities whose **predecessor** activities have been completed while scheduling activities subject to resource constraints. The secondary scheduling rule is used to break ties caused by the primary scheduling rule. The scheduling rule choices are

Activity Priority	Late Finish Time
Delayed Late Start	Resource Priority
Late Start Time	Shortest Duration

The default primary scheduling rule is Late Start Time, while the default secondary scheduling rule is Shortest Duration.

Activity Priority

The Activity Priority scheduling rule specifies that activities in the waiting list (for resources) should be sorted in the order of increasing values of their priority.

Delayed Late Start

The Delayed Late Start scheduling rule specifies that activities in the waiting list (for resources) should be sorted in the order of increasing values of their **late start** plus their **delay**.

Late Start Time

The Late Start Time scheduling rule specifies that activities in the waiting list (for resources) should be sorted in the order of increasing values of their **late start**.

Late Finish Time

The Late Finish Time scheduling rule specifies that activities in the waiting list (for resources) should be sorted in the order of increasing values of their **late finish**.

Resource Priority

The Resource Priority scheduling rule specifies that activities in the waiting list (for resources) should be sorted in the order of increasing values of the **resource priority** for the most important resource used by each activity. In other words, the resource priorities are used to assign priorities to the activities in the project; these activity priorities are then used to order the activities in the waiting list (in increasing order).

Shortest Duration

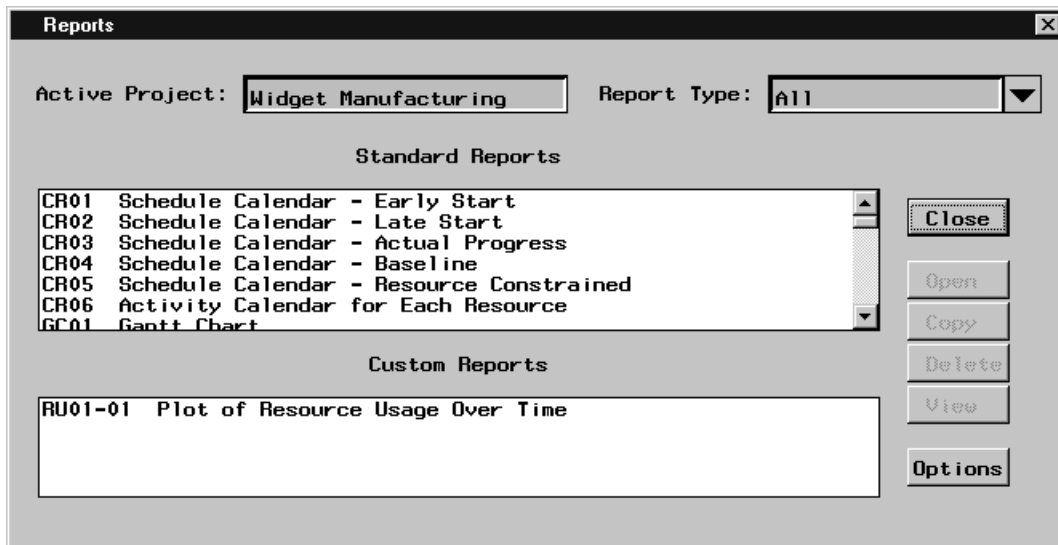
The Shortest Duration scheduling rule specifies that activities in the waiting list (for resources) should be sorted in the order of increasing values of their **durations**.

Reports Window

The Reports window displays a list of all project reports defined to the Projman application. Reports are divided into two categories, Standard and Custom. Standard reports are included with the application and cannot be modified or deleted. You can copy and modify standard reports to create custom reports, which can be copied, modified, and deleted.

Reports are grouped according to type. The following types are available:

Calendars	Resource Schedule
Gantt Charts	Resource Usage
Network Diagrams	Tabular
Resource Cost	



You can define as many different reports as you would like. Reports are designed to work with any project provided that the necessary data are available. Individual report options can be set by accessing the [Options window](#) for a particular report. For more information, see the “[Options Window](#)” section on page 759.

Global report options can be set by accessing the [Report Options window](#). These options include the setting of default colors and fonts as well as the specification of report titles and footnotes. For more information, see the “[Report Options Window](#)” section on page 755.

Active Project

The **Active Project** indicates the project that is active for the Reports window. When you generate reports, the active project provides the data for the selected report. When multiple projects are open at one time, the active project removes any confusion about which project data are used to produce the report. To change the active project, simply click on the name of the current project, and a list of open projects is displayed for selection.

Report Type

The **Report Type** combo box indicates the type of reports that are currently displayed in the window. By default, all reports are initially displayed. For example, you might use this option to specify that only Gantt chart reports are to be listed in the window. To change the report type, simply click on the combo box, and a list of available report types is displayed.

Standard Reports

This list contains all of the reports (of a particular type or types) that are defined by the Projman application. These standard reports cannot be modified or deleted. To make changes to one of these reports, you must select the desired report and press the **Copy** button. A copy of the selected report is added to the [Custom Reports](#) list. Use the **View** button to generate a report.

Custom Reports

This list contains all of the reports (of a particular type or types) that have been created by the user. Custom reports are created by copying a report from the list of [standard reports](#). These reports can be manipulated by selecting the desired report in the list and pressing the **Open**, **Copy**, or **Delete** buttons. Use the **View** button to generate a particular report.

Open

When this button is pressed, the selected custom report is displayed in the report's [Options window](#) for editing. For more information on that window, see the “[Options Window](#)” section on page 759. If no custom report is selected, this option is disabled.

Copy

When this button is pressed, the selected report is copied and displayed in the report's [Options window](#) for editing. For more information on that window, see the “[Options Window](#)” section on page 759. If no report is selected, this option is disabled.

Delete

When this button is pressed, the selected report in the [Custom Reports](#) list is deleted. A secondary window is opened to confirm the deletion. Note that the deletion of reports is irreversible. If no custom report is selected, this option is disabled.

View

When this button is pressed, the currently selected report is generated. If no report is selected, the option is disabled. Note that when modifying a specific custom report, you can view the report to verify the results before saving the current changes.

Options

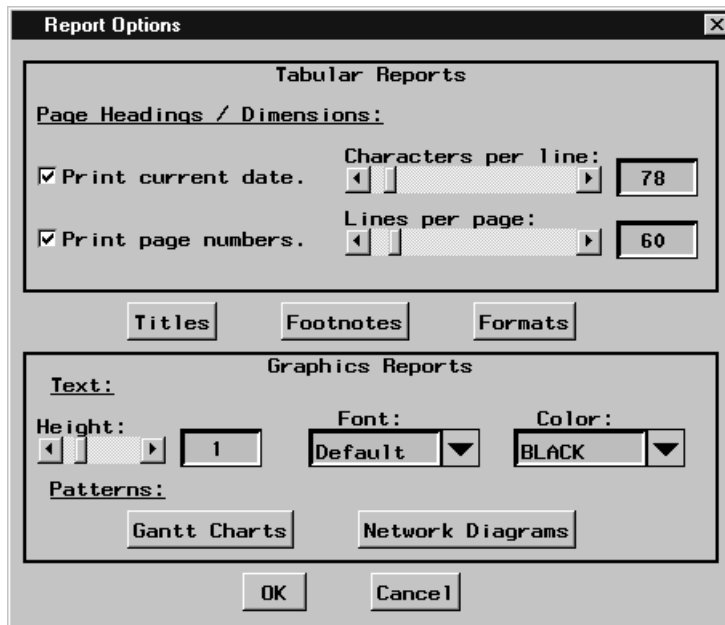
When this button is pressed, the [Report Options window](#) is displayed. From that window, you can control general options that affect all project reports. For more information, see the “[Report Options Window](#)” section on page 755.

Close

When this button is pressed, the window is closed. Also, all individual report [Options windows](#) (which are currently open) are closed.

Report Options Window

The Report Options window provides access to various options for both tabular and graphic quality reports. You can modify output appearance features such as page headings, titles, and footnotes as well as colors and fonts. These options affect all reports generated with the Projman application.



Tabular Report Options

Print current date.

When this option is selected, the current date is displayed in the upper-right corner of each page of all tabular (nongraphics quality) reports.

Print page numbers.

When this option is selected, page numbers are displayed in the upper-right corner of each page of all tabular (nongraphics quality) reports.

Characters per line

The horizontal slider can be used to specify the width of pages of tabular (nongraphics quality) reports. The number of characters per line must be an integer value between 64 and 256.

Lines per page

The horizontal slider can be used to specify the length of pages of tabular (nongraphics quality) reports. The number of lines per page must be an integer value between 15 and 512.

Titles

When the **Titles** button is pressed, a window is displayed for specifying one or more titles for project reports. You can customize any of your output from reports by adding up to four titles to the top of each page.

To create or modify a title, simply press the button corresponding to the title you want to modify. For each **title**, you can specify the type, color, and size of the font

as well as the justification used to align the text. Note that the type, color, size, and justification specifications are used only when producing graphics-quality reports. For more information, see the “[Title Window](#)” section on page 758.

Footnotes

When the **Footnotes** button is pressed, a window is displayed for specifying one or more footnotes for project reports. You can customize any of your output from reports by adding up to four footnotes to the bottom of each page.

To create or modify a footnote, simply press the button corresponding to the footnote you want to modify. For each [footnote](#), you can specify the type, color, and size of the font as well as the justification used to align the text. Note that the type, color, size, and justification specifications are used only when producing graphics-quality reports. For more information, see the “[Footnote Window](#)” section on page 759.

Formats

When the **Formats** button is pressed, a window is displayed for selecting the format to be used for displaying project schedules. You can specify whether reports are to display schedules using a DATE7. (that is, 01MAY04) or a DATETIME13. (that is, 01MAY04:12:00) format.

Graphics Report Options

Height

The horizontal slider can be used to specify the default height to be used for all text displayed in graphics-quality reports. The default value is 1, and valid values range from 0.1 to 5.

Font

The **Font** combo box can be used to specify the default font to be used for all text displayed in graphics-quality reports.

Color

The **Color** combo box can be used to specify the default color to be used for all text displayed in graphics-quality reports.

Gantt Chart Patterns

Pressing the **Gantt Charts** button opens a window where you can specify the colors and fill patterns of the activity bars drawn on graphics-quality Gantt charts.

The various types of activity bars, along with their respective colors and fill patterns, are listed in the window. To modify the attributes for a particular activity bar, simply click on the corresponding color or fill pattern, and a selection window is opened. From that window, simply select the desired color or fill pattern.

Network Diagram Patterns

Pressing the **Network Diagrams** button opens a window where you can specify the colors and fill patterns of the activity nodes drawn on graphics-quality network diagram reports.

The various types of activity nodes, along with their respective colors and fill patterns, are listed in the window. To modify the attributes for a particular activity node, simply click on the corresponding color or fill pattern, and a selection window is opened. From that window, simply select the desired color or fill pattern.

Title Window

The Title window is used to modify the attributes of report titles.



Text

The **Text** field is used to specify the text of the title or footnote. By default, Title1 contains “&projname”. When the report is generated, the macro variable, &projname, resolves to the name of the current project. Alternatively, &projdesc can be used to specify the project description.

Font

Use this selection to specify the font used to draw the **text** of the title or footnote. Note that the font specification is used only when producing graphics-quality reports.

Color

Use this selection to specify the color of the **text** of the title or footnote. Note that the color specification is used only when producing graphics-quality reports.

Justify

Use this selection to specify whether the **text** of the title or footnote is to be left-justified, centered, or right-justified on the page. Note that the justification specification is used only when producing graphics-quality reports.

Height

Use this selection to specify the height of the **text** of the title or footnote. The default height is 1, except for the Title1 (which has a default height of 2). Note that the height specification is only used when producing graphics-quality reports.

Footnote Window

The Footnote window is used to modify the attributes of report footnotes. For descriptions of the options, see the “Title Window” section on page 758.



Options Window

A report’s Options window is used to modify the characteristics of a selected report. Options differ depending on the type of report that is being modified. All reports fall into one of the following categories:

- [Calendar Reports](#)
- [Gantt Charts](#)
- [Network Diagrams](#)
- [Resource Reports](#)
- [Tabular Listings](#)

Standard Options

The following set of options are common to several different types of reports.

Id

The **Id** field displays a unique identifier label for the report. This label cannot be modified.

Name

The **Name** field can be used to provide a name for the report. The report name is used for identification purposes only.

Identifiers

When this button is pressed, a window is opened to enable you to add selections to the **Identifier list**. Selections are added to the bottom of the list as they are chosen. Items can be removed from the Identifier list by selecting the desired items and pressing the **Remove** button.

Identifier List

The Identifier list contains the list of variables that have been selected to provide identifying information for the report. For instance, the values of these variables are used to identify (highlight) records in a tabular report or activity bars on a Gantt chart. Use the **Identifiers** button to add items to this list.

Sub-Groups

When this button is pressed, a window is opened to enable you to add selections to the **Sub-Group list**. Selections are added to the bottom of the list as they are chosen. Items can be removed from the Sub-Group list by selecting the desired items and pressing the **Remove** button.

Sub-Group List

The Sub-Group list contains the list of variables that have been selected to provide grouping information for the report. For instance, like values of these variables are used to group records in a tabular report for separate analysis. Similarly, like values of these variables divide activities into groups for display on separate Gantt charts. Note that this separation (and any necessary sorting) is done automatically. Use the **Sub-Groups** button to add items to this list.

Remove

When this button is pressed, highlighted selections in the **Identifier** and **Sub-Group** lists are deleted.

OK

If you press the **OK** button, the current values displayed in the window are stored and the window is closed.

Cancel

If you press the **Cancel** button, all values displayed in the window are returned to their original values (as when the window was opened) and the window is closed.

View

When this button is pressed, the report is generated. This option is very useful for testing modifications to a report before actually saving the changes.

Edit Source...

When this button is pressed, a window is displayed for modifying the report source code. Changes to the source code should be made with care as incorrect changes can disable report options or cause the report to fail entirely. In the Edit Source window, type **ok** on the command line to save changes and **cancel** to cancel.

Macro Variables

This section describes the SAS macro variables that are defined by the Projman application during report generation. Many of these macro variables are used in the SAS source code provided with the standard reports. When you modify the source code of custom reports, this information may be helpful.

Standard Macro Variables

Name	Contents	Explanation
&reptname	'report name'	Current report name
&projname	'project name'	Active project name
&projdesc	'project description'	Active project description
&rdformat	datetime7. or datetime13.	specified by the Formats option
&varlist	'Variables variable names'	specified by the Variable list
&ivarlist	'Identifier variable names'	specified by the Identifier list
&byvlist	BY + 'Sub-Group variable names'	specified by the Sub-Group List

Calendar Reports

Name	Contents	Explanation
&start	'start variable name'	specified by the Schedule option
&finish	'finish variable name'	finish corresponding to &start
&calopts	header=Small, Medium, or Large	specified by the Header Size option
	fill	if Display All Months is selected
	missing	if Include Missing Labels is selected
&caldata	caledata=work.cal workdata= work.shift(drop=holiday workday)	if calendars used in scheduling
	holidata=work.hol	if holidays used in scheduling
&calstmt	calid calid;	if calendars used in scheduling
	outstart monday; outfinish friday;	if Display Weekdays Only is selected
&holstmt	holistart hstart; holidur holidur; holifin hfinish; holiname holiname;	if holidays used in scheduling

Note that the &caldata, &calstmt, and &holstmt macro variables are not defined unless the active project's [duration unit](#) is 'DAY' or 'WEEKDAY'.

Gantt Chart Reports

Name	Contents	Explanation
&gout	gout=work.ggseg	graphics catalog specification
&resdict	work.resdict	resource dictionary data set
&zonevar	'variable name'	first variable in Sub-Group List
&res	Lineprinter, Fullscreen or Graphics	specified by the Resolution option
&gantdata	caledata=work.cal workdata= work.shift(drop=holiday workday)	if calendars used in scheduling
	holidata=work.hol	if holidays used in scheduling
	labeldata=work.labels	if Mark Parent Tasks is selected
	precdata=work.repttemp (where=(obs_type='LOGIC'))	if Show Precedence is selected
&ganopts	mininterval='duration unit'	specified by the Per Interval option
	scale='integer value'	specified by the Columns option
	name="g"	graphics catalog entry name
	maxids	draw maximum number of identifiers
	interval='duration unit'	duration unit used for scheduling
	dur=duration cmile='color'	if Show Milestones is selected
	activity=actid succ=succid lag=lag cprec='color'	if Show Precedence is selected
	noarrowhead	if Suppress Arrowheads is selected
	nojobnum	unless Show Job Numbers is selected
	nolegend	unless Show Chart Legend is selected
	compress	if Compress To One Page is selected
	hconnect chcon='color'	if Draw Task Lines is selected
	critflag	if Flag Critical Tasks is selected
	combine	if Combine Schedules is selected
	labvar=actid	if Mark Parent Tasks is selected
	markwknd	if Mark Weekends is selected
	markbreak	if Mark Work Breaks is selected
	idpages	if Print Id On Each Page is selected
	fill	if Fill Pages Completely is selected
	noframe	if Suppress Chart Frame is selected
	pcompress	if Proportional Compress is selected
	hpages='integer value'	specified by the Horizontal Pages option
	vpages='integer value'	specified by the Vertical Pages option
	height='numeric value'	specified by the Text Height option
	caxis='color'	specified by the Time Axis option
	ctext='color'	specified by the Text option
	cframe='color'	specified by the Chart Frame option
	holiday=(hstart) holidur=(holidur) holifin=(hfinish)	if holidays were used in scheduling
	calid=calid	if calendars were used in scheduling
	timenow='timenow date'	if Draw Timenow Line is selected
notnlabel	unless Label Timenow Line is selected	

Note that the CALEDATA=, HOLIDATA= AND WORKDATA= specifications are not added to the &gantdata macro variable unless the active project's **duration unit** is larger than 'DAY'.

Network Diagram Reports

Name	Contents	Explanation
&gout	gout=work.ngseg	graphics catalog specification
&res	Lineprinter, Fullscreen or Graphics	specified by the Resolution option
&netopts	name='n'	graphics catalog entry name
	zone='variable name'	specified by the Zone Variable option
	nozonelabel	if Suppress Zone Labels is selected
	zonespace	if Space Between Zones is selected
	nodefautid	unless Show Default Vars is selected
	nolabel	unless Label Variables is selected
	duration=duration	if Show Duration is selected
	separatearcs	if Draw Separate Arcs is selected
	showstatus	if Show Progress is selected
	compress	if Compress To One Page is selected
	centerid	if Center Id Values is selected
	spanningtree	if Spanning Tree Layout is selected
	lag=(lag)	if Show Precedence Type is selected
	rectilinear	if Draw Rectangular Arcs is selected
	pcompress	if Proportional Compress is selected
	arrowhead=0	if Suppress Arrowheads is selected
	noarrowfill	if Draw Open Arrowheads is selected
	nonumber	if Suppress Page Numbers is selected
	hpages='integer value'	specified by the Horizontal Pages option
	vpages='integer value'	specified by the Vertical Pages option
	height='numeric value'	specified by the Text Height option
	carcs='color'	specified by the Arcs option
	ccritarcs='color'	specified by the Critical Arcs option
	ctext='color'	specified by the Node Text option
	frame caxis='color'	if Draw Border is selected
	autozone	if Automatic Zone Layout is selected
	linear	if Draw Linear Time Axis is selected
	autoref cref='color'	if Draw Reference Lines is selected
	refbreak	if Show Ref. Line Breaks is selected
	showbreak	if Show Time Axis Breaks is selected
notimeaxis	if Suppress Time Axis is selected	
align='schedule variable name'	specified by the Schedule option	

Note that the following specifications are not added to the &netopts macro variable unless the **Schedule** option is specified: FRAME, CAXIS=, LINEAR, AUTOREF, CREF=, REFBREAK, SHOWBREAK, AND NOTIMEAXIS.

Resource Reports

Name	Contents	Explanation
&gout	gout=work.rgseg	graphics catalog specification
&plotopts	name="r"	graphics catalog entry name
&chropts	name="r"	graphics catalog entry name
&resdict	work.resdict	resource dictionary data set
&schedout	'data set name'	report schedule data set
&varlist	__ALL__	if Scope option is set to All Resources
	'resource name'	if Scope option is set to Selected Resource
&res	Lineprinter or Graphics	specified by the Resolution option
&interval	'duration unit'	specified by the Frequency scheduling option
&mwhere		not currently initialized

Tabular Listing Reports

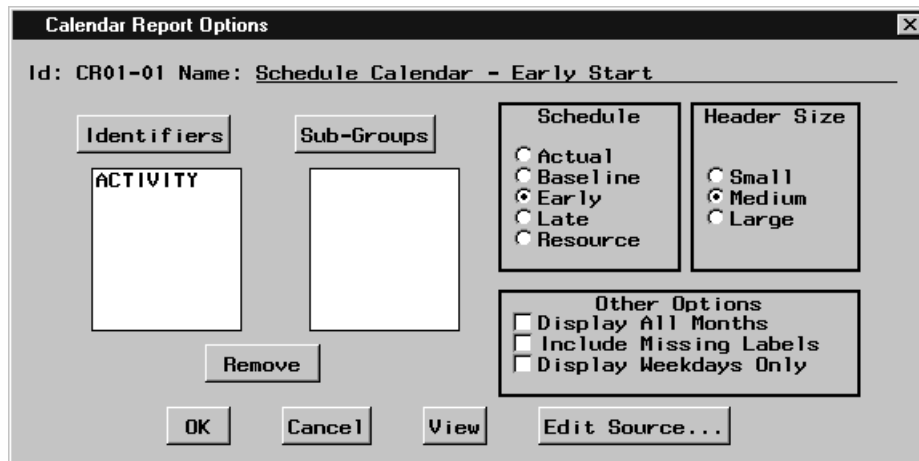
Name	Contents	Explanation
&prnopts	round	if Round values is selected
	double	if Double space is selected
	noobs	unless Print observation number is selected
	label	unless Suppress labels is selected
	n	if Print number of observations is selected
	uniform	if Format pages uniformly is selected

Calendar Report Options Window

This window provides access to the settings and options available for calendar reports. By changing values in this window, you can create and customize calendar reports to meet your specific needs. Note that some options may be unavailable if the [active project](#) does not contain the appropriate data. Also, if data unique to a specific project are required by a report, that report may fail when generated for a different project.

Note that reports can be generated and viewed to verify the results before any changes are saved. Access to the source code is also provided.

For a description of standard report options, see the "[Standard Options](#)" section on page 759.



Schedule

The setting of the **Schedule** option indicates which project schedule is to be used to mark activities on the calendar. You can choose from the actual, baseline, early, late, and resource-constrained schedules.

Header Size

This option specifies the type of heading to use in displaying the name of the month and year on the calendar report. When **Small** is selected, the month and year are displayed on one line. For the **Medium** selection, the month and year are displayed in a box 4-lines high, while the **Large** selection will display the month name 7-lines high (the year is included if space is available).

Display All Months

When selected, this option specifies that all months between the first and last activity start and finish dates, inclusive, are to be displayed (including months that contain no activities). If this option is not used, months with no activities are omitted from the report.

Include Missing Labels

When selected, this option specifies that missing values of identifier variables will appear in the label of an activity. If this option is not selected, missing values are ignored in labeling activities.

Display Weekdays Only

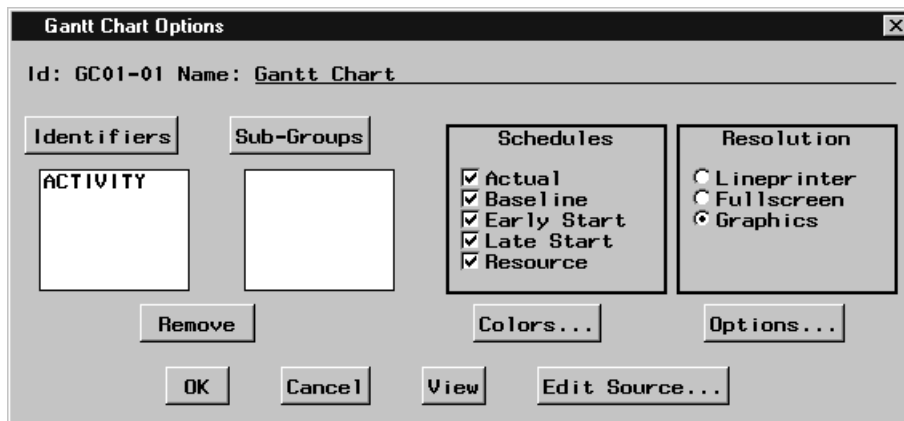
When selected, this option specifies that only days from Monday through Friday are to be displayed in the calendar.

Gantt Chart Options Window

This window provides access to the settings and options available for Gantt chart reports. By changing values in this window, you can create and customize Gantt chart reports to meet your specific needs. Note that some options may be unavailable if the [active project](#) does not contain the appropriate data. Also, if data unique to a specific project are required by a report, that report may fail when generated for a different project.

Note that reports can be generated and viewed to verify the results before any changes are saved. Access to the source code is also provided.

For a description of standard report options, see the “[Standard Options](#)” section on page 759.



Schedules

The **Schedules** options provide the capability to control which project schedules are to be drawn on the Gantt chart. You can choose one or more of the following schedules: actual, baseline, early start, late start, and resource-constrained. Note that at least one schedule should be selected. If the [active project](#) does not have the indicated schedules, the extra specifications are ignored when the report is generated.

Resolution

This option is used to specify the resolution of the Gantt chart report. The report can be produced with either lineprinter, fullscreen, or graphics-quality resolution.

Colors...

By pressing this button, you can access a window containing color options for the Gantt chart report. These [options](#) are used to control the colors of different portions of the Gantt chart output. Note that these options have no effect unless the **Resolution** option is set to produce a graphics-quality report. For more information, see the “[Color Options](#)” section on page 770.

Options...

By pressing this button, you can access a window containing additional options for the Gantt chart report.

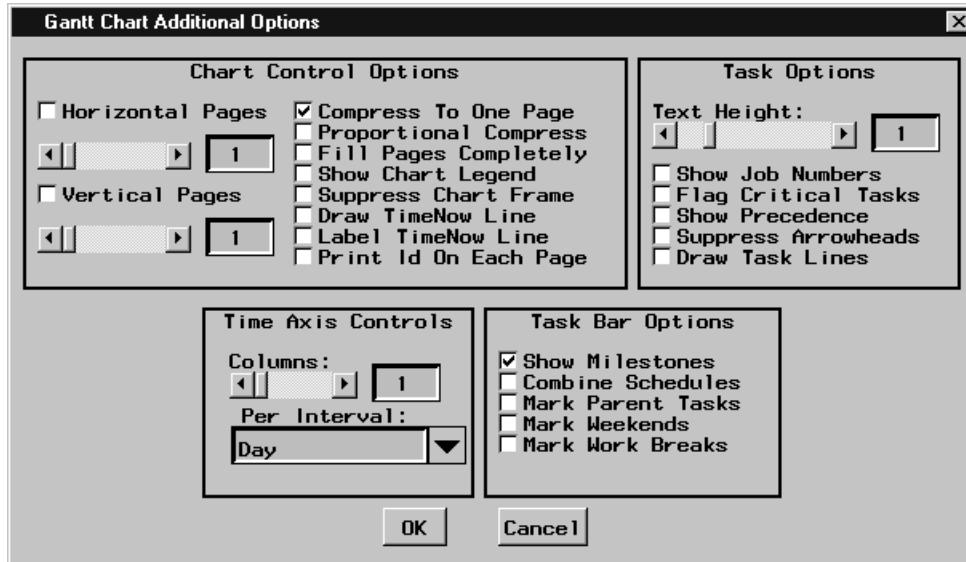


Chart Control Options

Horizontal Pages

When the **Horizontal Pages** option is selected (by activating the check box), the Gantt chart is scaled so that it spans the specified number of pages in the horizontal direction. The desired number of pages can be adjusted with the horizontal slider. Note that this option is used only when the report **Resolution** option is set for graphics-quality output. Due to intrinsic constraints on the output, the number of generated pages may not be exactly equal to the amount specified with this option.

Vertical Pages

When the **Vertical Pages** option is selected (by activating the check box), the Gantt chart is scaled so that it spans the specified number of pages in the vertical direction. The desired number of pages can be adjusted with the horizontal slider. Note that this option is used only when the report **Resolution** option is set for graphics-quality output. Due to intrinsic constraints on the output, the number of generated pages may not be exactly equal to the amount specified with this option.

Compress To One Page

When this option is specified, the Gantt chart is compressed so that it is drawn on one physical page. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Proportional Compress

When this option is specified, the Gantt chart is compressed so that it is drawn on one physical page. This option is the same as the **Compress To One Page** option except that the compression of the chart is done proportionally to maintain the correct aspect ratio. In other words, the amount of horizontal and vertical compression is equal. Note that this option is used only when the report **Resolution** option is set for graphics-quality output.

Fill Pages Completely

When the Gantt chart spans multiple pages, this option causes each page of the Gantt chart to be filled completely before a new page is started. By default, the pages are constrained to contain an approximately equal number of activities.

Show Chart Legend

When this option is specified, a concise default legend is displayed at the end of each page of the Gantt chart.

Suppress Chart Frame

When this option is specified, the vertical boundaries to the left and right of the Gantt chart are not drawn; only the time axis and a parallel line at the bottom of the chart are drawn. If this option is not specified, the entire chart is framed. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Draw TimeNow Line

When this option is specified, a vertical reference line is drawn on the time axis at the `timenow` date.

Label TimeNow Line

If the **Draw TimeNow Line** option is specified, selecting this option displays the value of the `timenow` date below the timenow line at the bottom of the Gantt chart.

Print Id On Each Page

When the Gantt chart spans multiple pages, selecting this option causes all values in the **Identifier list** to be displayed on each page of the Gantt chart.

Task Options

Text Height

When text height is specified as h , all text drawn on the Gantt chart (excluding titles and footnotes) is h times the value of the global text height option, which is specified in the **Report Options window**. For more information, see the “**Report Options Window**” section on page 755. Note that this option is used only when the report **Resolution** option is set for graphics-quality output.

Show Job Numbers

When this option is specified, an identifying job number is displayed beside each activity on the Gantt chart.

Flag Critical Tasks

When selected, this option indicates that **critical activities** are to be flagged as critical or supercritical. Critical activities are marked CR, and supercritical activities are marked SC on the left side of the Gantt chart.

Show Precedence

When this option is specified, **precedence relationships** are drawn on the Gantt chart. This option is used only when the report **Resolution** option is set for graphics-quality output.

Suppress Arrowheads

When the **Show Precedence** option is specified, selecting this option indicates that arcs drawn on the Gantt chart should be drawn without arrowheads. This option is ignored unless the report **Resolution** option is set for graphics-quality output.

Draw Task Lines

When specified, this option indicates that lines are to be drawn from the left edge of the Gantt chart to the beginning of the activity schedule bar.

Time Axis Controls

Columns

The horizontal slider is used to specify the number of columns (amount of space) for drawing each interval on the time axis, where interval is the value indicated with the **Per Interval** option. These options can be used to scale the size of the Gantt chart.

Per Interval

The **Per Interval** combo box indicates the **duration unit** to use for scaling the size of the Gantt chart. The **Columns** option indicates the number of columns (amount of space) available for drawing each specified interval on the time axis.

Task Bar Options

Show Milestones

When this option is specified, all activities that have zero **duration** are represented on the Gantt chart by a milestone symbol. This option is ignored unless the report **Resolution** option is set for graphics-quality output.

Combine Schedules

When this option is specified, the early/late and actual schedule bars of an activity are concatenated into a single bar on the Gantt chart. A vertical reference line is automatically drawn at the current [timenow date](#). This timenow line acts to partition the Gantt chart into two regions; the region to the left of the timenow line reporting the actual schedule (events that have already taken place) and the region to the right (including the timenow line) reporting only the predicted early/late schedule.

Mark Parent Tasks

When this option is specified, symbols are added to the activity bars of [supertasks](#) on the Gantt charts. These symbols emphasize the parent-child relationship between the supertask and its [subtasks](#). This option is used only when the report [Resolution](#) option is set for graphics-quality output.

Mark Weekends

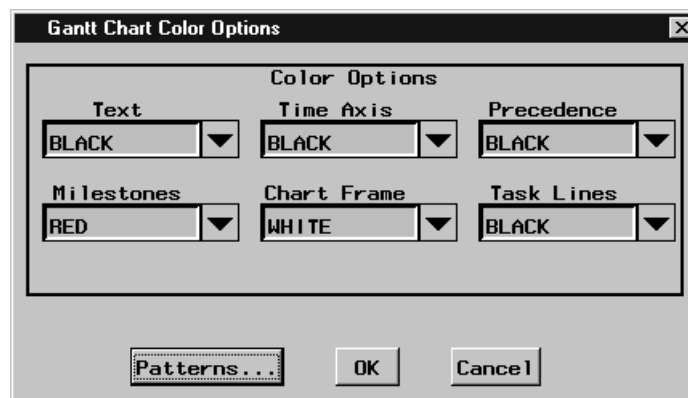
When this option is specified, all weekends (or nonworked days during a week) are marked on the Gantt chart.

Mark Work Breaks

When this option is specified, all work breaks (nonworked periods) during a day are marked on the Gantt chart. This option automatically activates the [Mark Weekends](#) option.

Color Options

This window is used to set options that control the color of various features of the Gantt chart report. Note that these options are ignored unless the report [Resolution](#) option is set for graphics-quality output.



Text

The **Text** combo box can be used to specify the color to use for displaying text that appears on the Gantt chart. Note that this color specification does not apply to titles, footnotes or any annotated text.

Time Axis

The **Time Axis** combo box can be used to specify the color to use for displaying the time axis along the top of the Gantt chart. The same color is also used for the frame around the chart area (where the activity bars are drawn).

Precedence

The **Precedence** combo box can be used to specify the color to use for drawing the precedence connections on the Gantt chart. Note that this option is used only when [precedence relationships](#) are to be drawn on the Gantt chart.

Milestones

The **Milestone** combo box can be used to specify the color to use for drawing any milestone symbols that appear on the Gantt chart.

Chart Frame

The **Chart Frame** combo box can be used to specify the background color for the chart area (where the activity bars are drawn).

Task Lines

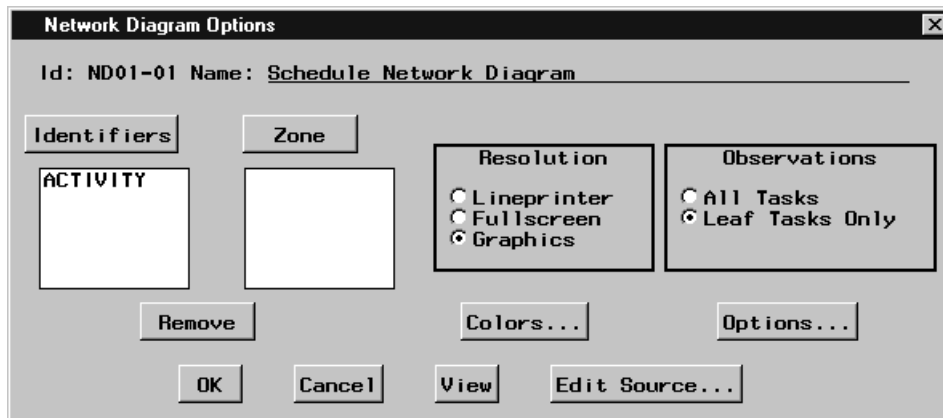
The **Task Lines** combo box can be used to specify the color to use for drawing the task lines on the Gantt chart. Note that this option is used only when [task lines](#) are to be drawn on the Gantt chart.

Network Diagram Options Window

This window provides access to the settings and options available for network diagram reports. By changing values in this window, you can create and customize reports to meet your specific needs. Note that some options may be unavailable if the [active project](#) does not contain the appropriate data. Also, if data unique to a specific project are required by a report, that report may fail when generated for a different project.

Note that reports can be generated and viewed to verify the results before any changes are saved. Access to the source code is also provided.

For a description of standard report options, see the [“Standard Options”](#) section on page 759.



Zone

When the **Zone** button is pressed, a window is opened to enable you to select a [Zone variable](#). The selection is displayed on the window. The Zone variable can be removed by selecting the variable and pressing the **Remove** button.

Zone Variable

The Zone variable is used to divide the network diagram into horizontal bands or zones corresponding to the distinct values of the variable. Most projects have at least one natural classification of the different activities in the project: department, type of work involved, location of the activity, and so on. By specifying a Zone variable, you can use this classification to subdivide the network diagram. The zones are automatically labeled with the Zone variable values and are separated by dividing lines. Use the **Zone** button to select a Zone variable.

Remove

When this button is pressed, highlighted selections in the [Identifier](#) and [Zone](#) lists are deleted.

Resolution

This option is used to specify the resolution of the network diagram report. The report can be produced with either lineprinter, fullscreen, or graphics-quality resolution.

Observations

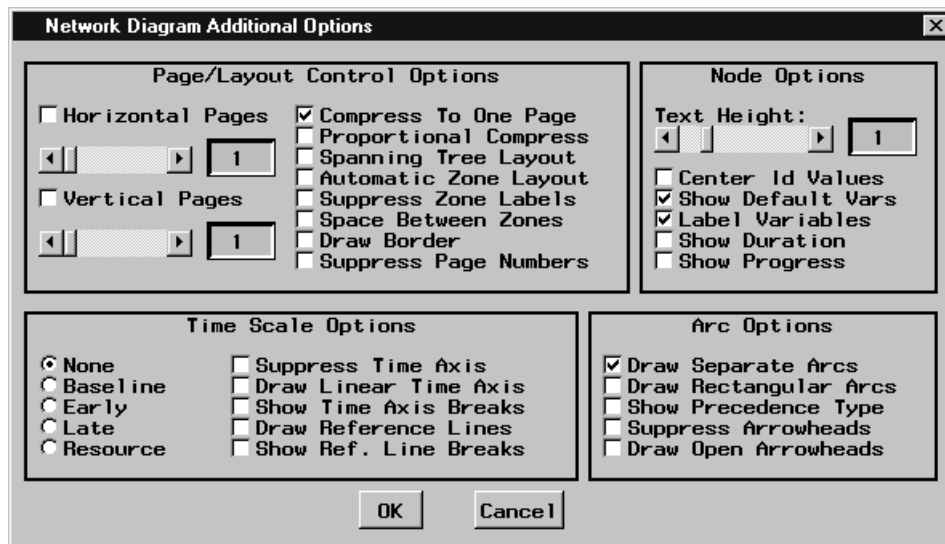
This option is used to specify which observations are used to produce the network diagram. For hierarchical projects, selecting **Leaf Tasks Only** means that only the lowest level tasks appear in the network diagram. When **All Tasks** is specified, all tasks (regardless of their hierarchical relationship) appear in the network diagram as separate nodes.

Colors...

By pressing this button, you can access a window containing color options for the network diagram report. These [options](#) are used to control the colors of different portions of the network diagram. Note that these options are ignored unless the **Resolution** option is set to produce a graphics-quality report. For more information, see the “Color Options” section on page 777.

Options...

By pressing this button, you can access a window containing additional options for the network diagram report.



Page/Layout Control Options

Horizontal Pages

When the **Horizontal Pages** option is selected (by activating the check box), the network diagram is scaled so that it spans the specified number of pages in the horizontal direction. The desired number of pages can be adjusted with the horizontal slider. Note that this option is used only when the report **Resolution** option is set for graphics-quality output. Due to intrinsic constraints on the output, the number of generated pages may not be exactly equal to the amount specified with this option.

Vertical Pages

When the **Vertical Pages** option is selected (by activating the check box), the network diagram is scaled so that it spans the specified number of pages in the vertical direction. The desired number of pages can be adjusted with the horizontal slider. Note that this option is used only when the report **Resolution** option is set for graphics-quality output. Due to intrinsic constraints on the output, the number of generated pages may not be exactly equal to the amount specified with this option.

Compress To One Page

When this option is specified, the network diagram is compressed so that it is drawn on one physical page. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Proportional Compress

When this option is specified, the network diagram is compressed so that it is drawn on one physical page. This option is the same as the **Compress To One Page** option except that the compression of the diagram is done proportionally to maintain the correct aspect ratio. In other words, the amount of horizontal and vertical compression is equal. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Spanning Tree Layout

When this option is specified, the nodes in the network diagram are positioned using a spanning tree. This method typically results in a wider layout than the default. However, for networks that have totally disjoint pieces, this option separates the network into connected components (or disjoint trees). This option is ignored if a time axis is being drawn or if the **Zone variable** is specified.

Automatic Zone Layout

When specified, this option allows automatic zoning (or dividing) of the network into connected components. This option is equivalent to adding an automatic **Zone variable** that associates a tree number for each node. The tree number refers to a number assigned automatically to each distinct tree of a spanning tree of the network.

Suppress Zone Labels

When this option is selected and a **Zone variable** is specified, the zone labels and dividing lines are omitted from the network diagram.

Space Between Zones

When this option is selected and the **Zone variable** is specified, extra empty space is placed between consecutive zones.

Draw Border

When this option is specified, a border (or frame) is drawn around the network diagram. This option is ignored if no time axis is being drawn or if no **Zone variable** is specified.

Suppress Page Numbers

When this option is selected, no page numbers are drawn in the upper right-hand corner of a multipage network diagram. By default, pages are numbered from left to right, top to bottom.

Node Options

Text Height

When text height is specified as h , all text drawn on the network diagram (excluding titles and footnotes) is h times the value of the global text height option, which is specified in the [Report Options window](#). For more information on this window, see the “[Report Options Window](#)” section on page 755. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Center Id Values

When this option is specified, all values of variables in the [Identifier list](#) are centered within each node in the network diagram. By default, character valued variables are left justified and numeric valued variables are right justified within each node. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Show Default Vars

When this option is specified, values of the default variables are displayed within each node. These values include the activity name and any project schedule dates or float amounts. If this option is not selected, only values appearing in the [Identifier list](#) are displayed.

Label Variables

When this option is specified, short (3-character) labels are displayed in front of the values that are listed within each node of the network diagram. By default, there are no labels.

Show Duration

When this option is specified, the duration of each activity is listed within the corresponding node in the network diagram.

Show Progress

When this option is specified, the current status (completed, in-progress, or pending) is indicated within each node of the network diagram. If the network diagram is created with lineprinter or fullscreen [resolution](#), activities in progress are outlined with the letter P and completed activities are outlined with the letter F; in graphics-quality resolution, in-progress activities are marked with a diagonal line across the node from the bottom left to the top right corner, while completed activities are marked with two diagonal lines. Pending activities are drawn in the default manner.

Time Scale Options

Schedule

Selecting a schedule indicates that a time axis is to be drawn across the top of the network diagram and nodes are to be positioned horizontally according to the values of the selected schedule start times. The minimum and maximum values are used to determine the time axis. You can choose from the baseline, early, late, and resource-constrained schedules.

Suppress Time Axis

When this option is selected, no time axis is drawn on the network diagram; however, nodes are still positioned horizontally according to the **Schedule** option.

Draw Linear Time Axis

When a time axis is being drawn on the network diagram, the axis is divided up into even intervals based on the **duration unit**. By default, only those intervals (columns) that contain at least one activity are drawn. When this option is specified, all intervals are drawn. In some cases, this option may cause the network diagram to span many pages in the horizontal direction.

Show Time Axis Breaks

When this option is specified, breaks in the time axis are indicated by drawing a jagged break in the time axis line just before the tick mark corresponding to the break. The time axis is determined by the setting of the **Schedule** option.

Draw Reference Lines

When this option is specified, a reference line is drawn at every tick mark (column) along the time axis. Reference lines are vertical lines drawn at specific positions along the time axis to indicate time intervals. The time axis is determined by the setting of the **Schedule** option.

Show Ref. Line Breaks

When this option is specified, breaks in the time axis are indicated by drawing a zigzag line down the network diagram just before the tick mark corresponding to the break. The time axis is determined by the setting of the **Schedule** option.

Arc Options

Draw Separate Arcs

When this option is specified, arcs drawn on the network diagram are allowed to follow distinct tracks. By default, all segments of the arcs are drawn along a central track between the nodes, which may cause several arcs to be drawn on top of one another. If this option is selected, the arcs are drawn so that they do not overlap. Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Draw Rectangular Arcs

When this option is specified, all arcs are drawn with rectangular corners. By default, arcs are drawn with rounded corners when the report **Resolution** option is set for graphics-quality output.

Show Precedence Type

When this option is specified, arcs are drawn to indicate the type of **logical relationship** between the activities at either end of the arc. The start and end points of the arcs are adjusted to represent the specific relationship. By default, all arcs are drawn out of the right edge of nodes and into the left edge of nodes.

Suppress Arrowheads

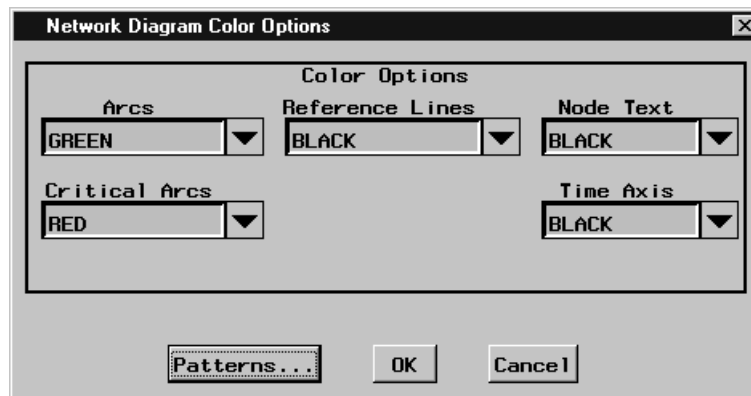
When this option is specified, all arcs are drawn without arrowheads.

Draw Open Arrowheads

When this option is selected, the arrowheads on the end of the arcs are not filled. By default, the arrowheads are filled (solid). Note that this option is ignored unless the report **Resolution** option is set for graphics-quality output.

Color Options

This window is used to set options that control the color of various features of the network diagram. Note that these options are ignored unless the report **Resolution** option is set for graphics-quality output.



Arcs

The **Arcs** combo box can be used to specify the color to use for drawing the connecting lines between the nodes in the network diagram.

Critical Arcs

The **Critical Arcs** combo box can be used to specify the color to use for drawing the arcs connecting critical activities in the network diagram.

Reference Lines

The **Reference Lines** combo box can be used to specify the color to use for drawing reference lines on the network diagram. Reference lines are vertical lines drawn at specific positions along the time axis to indicate time intervals. Note that this option is used only when a time axis is drawn along the top of the network diagram.

Node Text

The **Node Text** combo box can be used to specify the color to use for displaying text that appears within nodes on the network diagram. Note that this color specification does not apply to titles, footnotes, or any annotated text.

Time Axis

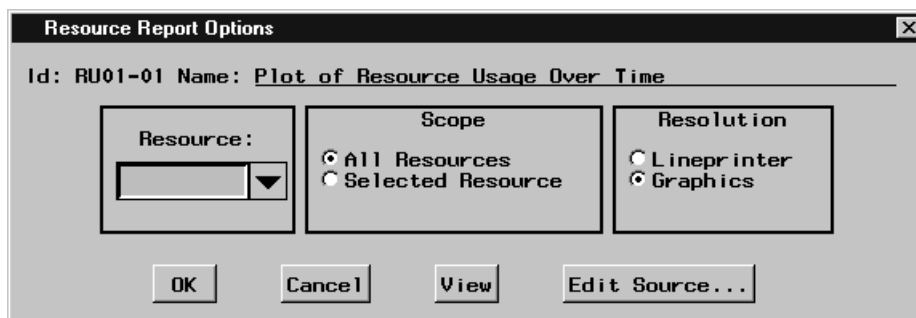
The **Time Axis** combo box can be used to specify the color to use for displaying the time axis along the top of the network diagram. The same color is also used for the frame around the chart area (where the activity bars are drawn). Note that this option is used only when a time axis is drawn along the top of the network diagram.

Resource Report Options Window

This window provides access to the settings and options available for resource reports. By changing values in this window, you can create and customize reports to meet your specific needs. Note that some options may be unavailable if the **active project** does not contain the appropriate data. Also, if data unique to a specific project are required by a report, that report may fail when generated for a different project.

Note that reports can be generated and viewed to verify the results before any changes are saved. Access to the source code is also provided.

For a description of standard report options, see the “**Standard Options**” section on page 759.



Resource

You can use the **Resource** combo box to select a specific resource for the report. By default, all resources are used for the report. When a resource is selected and the **Scope** option indicates that the selected resource is to be used, the resulting report contains summarized information for that resource only.

Scope

The **Scope** option indicates whether the report is to utilize data about all project resources or only the resource specified with the **Resource** option. By default, all resources are used for the report. When a resource is selected with the **Resource** option and **Selected Resource** is chosen, the resulting report contains summarized information for the selected resource only.

Resolution

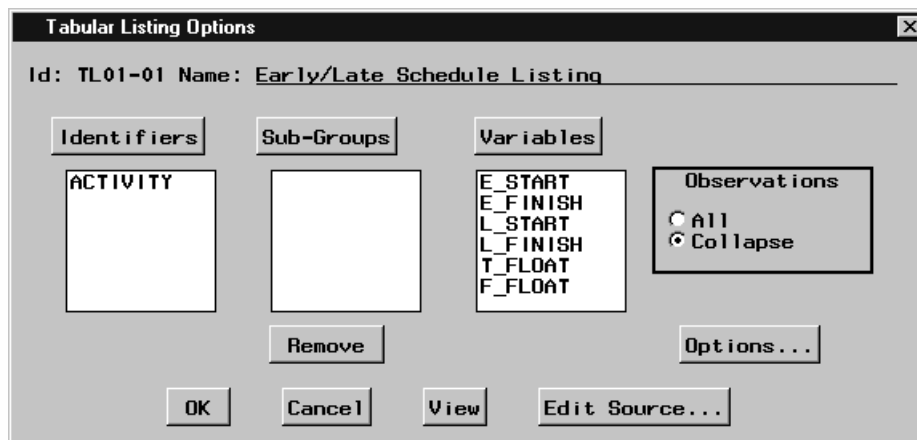
This option is used to specify the resolution of the resource report. The report can be produced with either lineprinter or graphics quality.

Tabular Listing Options Window

This window provides access to the settings and options available for tabular listing reports. By changing values in this window, you can create and customize reports to meet your specific needs. Note that some options may be unavailable if the **active project** does not contain the appropriate data. Also, if data unique to a specific project are required by a report, that report may fail when generated for a different project.

Note that reports can be generated and viewed to verify the results before any changes are saved. Access to the source code is also provided.

For a description of standard report options, see the “**Standard Options**” section on page 759.



Variables

When this button is pressed, a window is opened to allow selections to be added to the **Variable list**. Selections are added to the bottom of the list as they are chosen. Items can be removed from the Variable list by selecting the desired items and pressing the **Remove** button.

Variable List

The Variable list contains the list of variables that are to be displayed in the tabular listing report. The information contained in these variables is displayed to the right of the information provided by the [Identifier list](#) in the report. Use the [Variables](#) button to add items to this list.

Remove

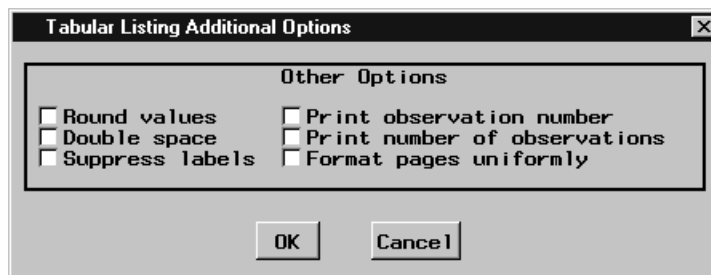
When this button is pressed, highlighted selections in the [Identifier](#), [Sub-Group](#), and [Variable](#) lists are deleted.

Observations

This option enables you to control which observations are used for the tabular listing report. The **All** selection indicates that all records in the input data set are to be used, while the **Collapse** selection indicates that only one observation should be displayed for each activity. When activities have multiple successors (as is usually the case), the input data set contains multiple records for some activities. Thus, when all observations are used, there can be some duplication in the resulting report.

Options...

By pressing this button, you can access a window containing additional options for the tabular listing report. These [options](#) are used to format the output.



Additional Options

Round values

When you select this option, all numeric variables are rounded to two decimal places. Values are rounded before summing for totals and subtotals.

Double space

When you select this option, the report is double spaced. If this option is not specified, the report is single spaced.

Suppress labels

By default, variable labels are displayed instead of the variable names as the column heading in the tabular listing report. If you choose this option, the labels are suppressed and the variable names are used instead.

Print observation number

When this option is selected, an observation (record) number is displayed for each observation in the tabular listing report. If the [Identifier list](#) is not empty, this option has no effect.

Print number of observations

When this option is selected, the total number of observations (records) in the tabular listing report is displayed at the end of the report.

Format pages uniformly

When this option is specified, all pages of the tabular listing report are formatted uniformly. If this option is not specified, some pages may be spaced differently (depending on the data).

Import Activity Data Set Window

This window enables you to import a SAS data set that contains project activity information. Projman assumes that the selected data set is in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For more information, refer to [Chapter 2, “The CPM Procedure,”](#) or [Chapter 3, “The PM Procedure.”](#)

When you select the data set that you want to import, you must identify certain variables within that data set. Projman attempts to recognize the variables by searching for some standard names; however, it is likely that you will need to select the required variables. When all the necessary selections have been made and the activity data set is imported, a new project is created.

The screenshot shows the 'Import Activity data set' dialog box. It is divided into two main sections. The top section, titled 'Choose Variables Data Set', contains a table with three columns: 'Library', 'Data Set', and 'Variables'. The 'Library' column lists 'SASHELP', 'MAPS', 'SASUSER', and 'WORK'. The 'Data Set' and 'Variables' columns are empty. To the right of this table are buttons for 'Import', 'Cancel', 'Reset', and a 'Remove' checkbox. The bottom section, titled 'Assign Basic Activity Variables', contains a grid of buttons for selecting variables: 'Activity', 'Successors', 'Lead / Lag', 'Details', 'Duration', 'Description', 'Calendar', 'Project', 'Progress / Baseline', 'Resources', and 'Additional Info'. Each button has a corresponding empty text box below it.

Standard Import Options

The following set of options are common to several different import windows.

Library

This list contains all currently defined SAS library names. Use this list to select the library that contains the data set that you want to import. Selection of a library automatically populates the [Data Set list](#).

Data Set

This list contains the names of all SAS data sets that currently reside in the selected [library](#). When you select the data set that you want to import, the [Variables](#) list is populated automatically. When a data set is selected, some automatic variable selection may also take place.

Variables

This list contains the names of the variables that currently exist in the selected SAS [data set](#). To import variable selections, simply select the desired variable or variables in this list and press the appropriate button.

Import

When all necessary selections have been made, pressing this button causes the selected [data set](#) to be imported. If additional selections are required, an attention window is displayed.

OK

Pressing this button accepts the current selections and closes the window.

Cancel

Pressing this button cancels the current selections and closes the window or aborts the import process if it is selected in the primary import window.

Reset

Pressing this button causes all variable selections in the current window to be cleared.

Remove

When the **Remove** check box is selected, pressing a variable button causes the corresponding import variable selection to be cleared. You can use the [Reset](#) button to clear all import variable selections in the current window.

Secondary Windows

Progress / Baseline

Pressing this button opens a window that enables you to specify variables that contain activity progress information and baseline schedules. This information is optional. For information on this window, see the “[Progress/Baseline Information](#)” section on page 785.

Resources

Pressing this button opens a window that enables you to identify the variables that contain resource requirement information for the activities. You can also specify which variable contains the activity work rate. This information is optional. For information on this window, see the “[Resource Information](#)” section on page 786.

Additional Info

Pressing this button opens a window that enables you to specify variables that contain information about activity target (alignment) dates, limits on activity delay, activity priorities for resource scheduling, and activity splitting. This information is optional. For information on this window, see the “[Additional Information](#)” section on page 787.

Basic Activity Information

This window is used to identify variables that contain basic activity information. For a description of standard import options, see the “[Standard Import Options](#)” section on page 782.

Import Activity data set

Library	Choose Variables Data Set	Variables
SASHELP	RENOVATE	actname
MAPS	COLORS_	succname
SASUSER	RES5	duration
WORK	RSC5	calname
	SCH5	bstart
	A5	bfinish

Buttons: Import, Cancel, Reset, Remove

Assign Basic Activity Variables

Activity	Successors	Lead / Lag	Details
actname	succname		
Duration	Description	Calendar	Project
duration		calname	

Buttons: Progress / Baseline, Resources, Additional Info

Activity

The Activity variable should contain values that represent the names of the activities of the project. These names are assumed to be unique for each activity. This variable can contain either character or numeric values. If **Successor** variables are specified, the format must be the same as the Activity variable. An Activity variable is required.

Successors

The Successor variables should contain values that represent the names of the successor activities of the project. This variable can contain either character or numeric values. If Successor variables are specified, the format must be the same as the **Activity** variable.

Description

The Description variable normally will contain values that provide more detailed information (that is, longer name) about the activity. This variable can be either character or numeric.

Project

The Project variable should contain values that represent the names of the parent (project) activities of the project. In other words, this variable indicates the parent-child (supertask-subtask) relationship between the activity named in the Project variable and the activity named in the Activity variable. This variable should be in the same format as the **Activity** variable.

Duration

The Duration variable should contain values that represent the duration of each project activity. The unit of duration is assumed to be the same for each activity. This variable must be numeric.

Lead / Lag

The Lead / Lag variables should contain values that represent the lags (or **nonstandard precedence relationships**) between the activities specified in the **Activity** and **Successor** variables. Although it is not required, the number of Lead / Lag variables should match the number of Successor variables. The **lag values** are required to follow the same naming convention as that used by the **CPM procedure**. For more information, see the LAG= option in the “**SUCCESSOR Statement**” section on page 86.

Calendar

The Calendar variable should contain values that represent the name of the calendar that the activity is to follow. Projman assumes that the calendars will be defined after the activities are imported. At that time, you can create the calendars manually or import a calendar data set. This variable can be either character or numeric.

Details

The Details variables can be used to import nonstandard information about the activities that is stored in the import data set. For instance, you may want to import information stored in variables representing the phase of the project or the department that is responsible for the activity. These variables can be both character and numeric.

Progress/Baseline Information

This window is used to identify variables that contain activity progress information and baseline schedules. For a description of standard import options, see the “Standard Import Options” section on page 782.

Actual Start

The Actual Start variable should contain values that represent the actual start date of the activity. This variable must be numeric.

Actual Finish

The Actual Finish variable should contain values that represent the actual finish date of the activity. This variable must be numeric.

% Completed

The Percent Completed variable should contain values representing the percentage of the activity that is completed. This variable must be numeric and should contain values between 0 and 100.

Rem. Duration

The Remaining Duration variable should contain values that represent the amount of time remaining for an activity that is in progress. This variable must be numeric and should contain nonnegative values. The unit of duration is assumed to be the same as that for the [Duration](#) variable.

Baseline Start

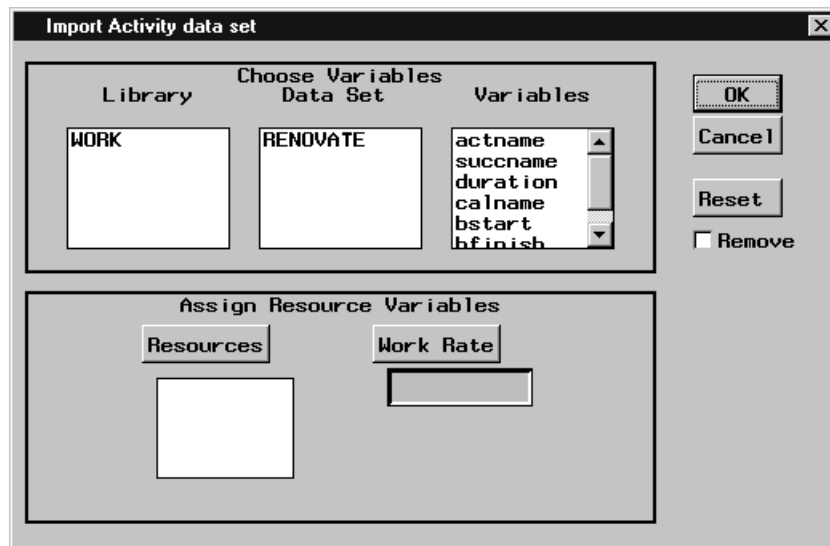
The Baseline Start variable should contain values that represent the baseline start date of the activity. This variable must be numeric.

Baseline Finish

The Baseline Finish variable should contain values that represent the baseline finish date of the activity. This variable must be numeric.

Resource Information

This window is used to identify variables that contain resource requirement information. For a description of standard import options, see the “[Standard Import Options](#)” section on page 782.

**Resources**

The Resource variables should contain values that indicate the amount of resource that is needed for a particular activity. For consumable resources, this value represents the amount of resource needed per unit of duration; for replenishable resources, it indicates the amount of resource that must be available throughout the duration of the activity. These variables must be numeric.

Work Rate

The Work Rate variable should contain values that indicate the total amount of work (time) required by one unit of a resource for a particular activity. This variable can be used to drive the activity duration for each resource required by the activity using the resource rate specified in the corresponding Resource variable.

Additional Information

This window is used to identify variables that contain additional activity information. For a description of standard import options, see the “Standard Import Options” section on page 782.

Target Date

The Target Date variable should contain values that represent the date portion of an activity alignment constraint. For example, an activity must finish on or before a particular date. The type of alignment constraint is specified in the [Target Type](#) variable. The Target Date variable must be numeric.

Target Type

The Target Type variable should contain values that represent the type portion of an activity alignment constraint. For example, an activity must finish on or before a particular date. The date portion of the alignment constraint is specified in the [Target Date](#) variable. The target type values are required to follow the same naming convention as that used by the [CPM procedure](#). For more information, see the “[ALIGNTYPE Statement](#)” section on page 68.

Min Seg. Duration

The Minimum Segment Duration variable should contain values that indicate the minimum duration of a single segment of an activity (when activity splitting is allowed). This variable must be numeric.

Max Num. Segments

The Maximum Number of Segments variable should contain values that indicate the maximum number of segments into which an activity can be split (when activity splitting is allowed). This variable must be numeric.

Activity Delay

The Activity Delay variable should contain values that indicate the maximum amount of time by which an activity can be delayed due to resource unavailability. This variable must be numeric.

Activity Priority

The Activity Priority variable should contain values that indicate the priority of an activity (lower values indicate higher priority). The activity priority can be used to order activities that are waiting for an unavailable resource. This variable must be numeric.

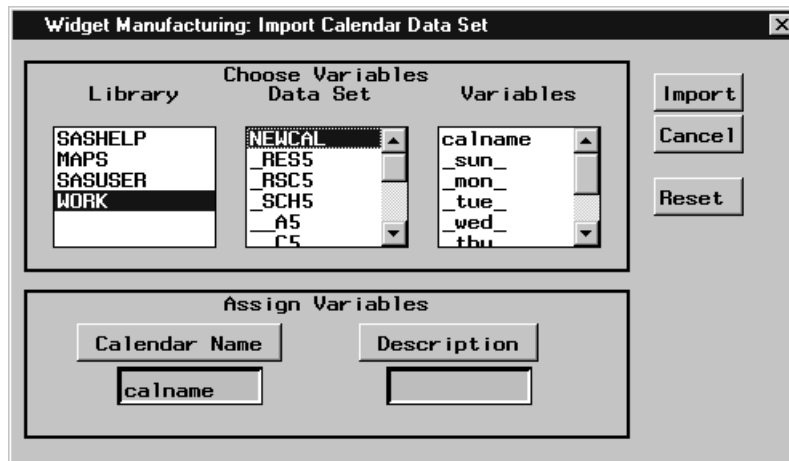
Import Calendar Data Set Window

This window enables you to import a SAS data set that contains calendar information. Projman assumes that the selected data set is in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For more information, see the [CALEDATA Data Set](#) section.

When you select the data set that you want to import, you must identify certain variables within that data set. Projman attempts to recognize the variables by searching for some standard names; however, it is likely that you will need to select the required variables. When all the necessary selections have been made and the calendar data set is imported, the appropriate calendars are created.

Note that valid calendar data sets are expected to contain the following standard variables: `_SUN_`, `_MON_`, `_TUE_`, `_WED_`, `_THU_`, `_FRI_` and `_SAT_`.

For a description of standard import options, see the “[Standard Import Options](#)” section on page 782.



Calendar Name

The Calendar Name variable should contain values that represent the names of the individual calendars. This variable can be either character or numeric, and it is required.

Description

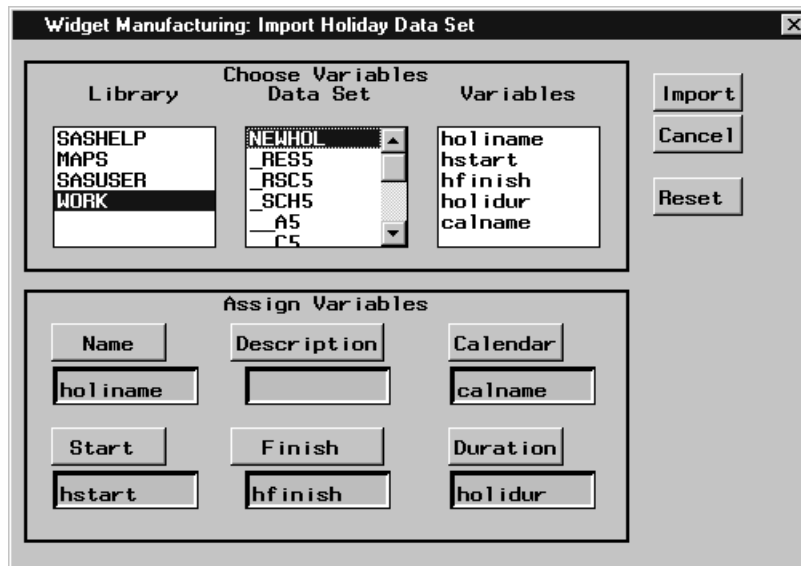
The Description variable normally contains values that provide more detailed information (that is, longer name) about the calendar. This variable can be either character or numeric.

Import Holiday Data Set Window

This window enables you to import a SAS data set that contains holiday information. Projman assumes that the selected data set is in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For more information, see the [HOLIDATA Data Set](#) section.

When you select the data set that you want to import, you must identify certain variables within that data set. Projman attempts to recognize the variables by searching for some standard names; however, it is likely that you will need to select the required variables. When all the necessary selections have been made and the holiday data set is imported, the appropriate holidays are created.

For a description of standard import options, see the “[Standard Import Options](#)” section on page 782.



Name

The Name variable should contain values that represent a short name for each holiday. This variable can be either character or numeric.

Description

The Description variable normally contains values that provide more detailed information (that is, longer name) about the holiday. This variable can be either character or numeric.

Calendar

The Calendar variable should contain values that represent the name of the calendar to which the holiday belongs. Projman assumes that the calendars already exist. If they do not, after the import, you can create the calendars or import a calendar data set. This variable can be either character or numeric.

Start

The Start variable should contain values that indicate the start date of each holiday. This variable must be numeric, and it is required.

Finish

The Finish variable should contain values that indicate the finish date of each holiday. This variable must be numeric. This variable is optional; however, if the [Duration](#) variable is not specified, Projman assumes that each holiday is to last one [duration unit](#).

Duration

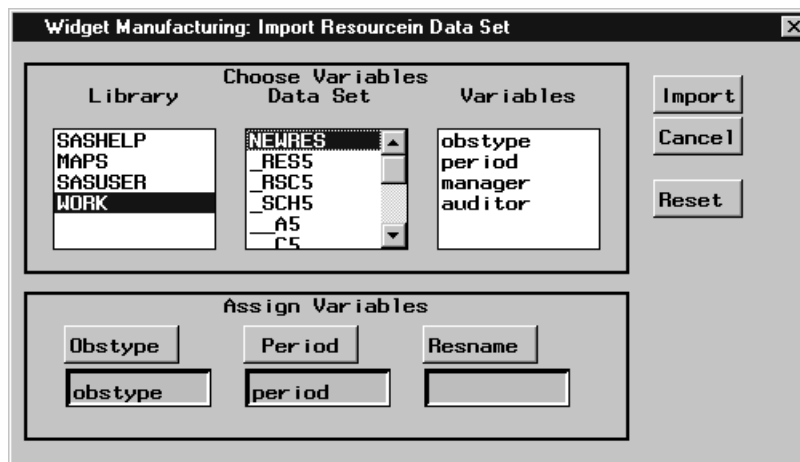
The Duration variable should contain values that indicate the length of each holiday. This variable must be numeric. This variable is optional; however, if the [Finish](#) variable is not specified, Projman assumes that each holiday is to last one [duration](#) unit.

Import Resourcein Data Set Window

This window enables you to import a SAS data set that contains resource information. Projman assumes that the selected data set is in the format appropriate for input to the [CPM](#) or [PM](#) procedure. For more information, see the [RESOURCEIN= Input Data Set](#) section.

When you select the data set that you want to import, you must identify certain variables within that data set. Projman attempts to recognize the variables by searching for some standard names; however, it is likely that you will need to select the required variables. When all the necessary selections have been made and the resourcein data set is imported, the appropriate resources are created.

For a description of standard import options, see the “[Standard Import Options](#)” section on page 782.



Obstype

The Obstype variable should contain values that represent the type identifier for the particular observation. The Obstype values are required to follow the same naming convention as that used by the [CPM procedure](#). For more information, see the [OBSERVE=variable](#) section. This variable must be character, and it is required.

Period

The Period variable should contain values that indicate the specific date for each observation containing resource availability information. This variable must be numeric.

Resname

The Resname variable should contain values that represent the names of resources that have alternate (substitutable) resource specifications. This variable must be character.

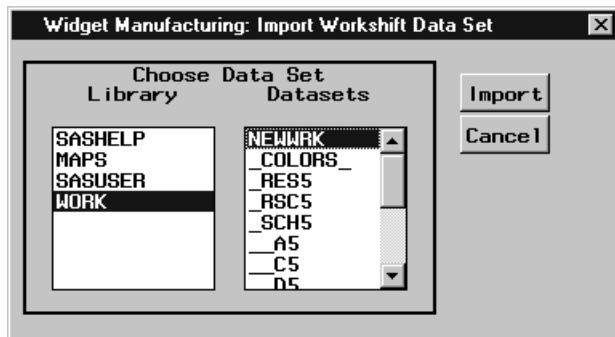
Import Workshift Data Set Window

This window enables you to import a SAS data set that contains workshift information. Projman assumes that the selected data set is in the format appropriate for input to the **CPM** or **PM** procedure. For more information, see the **WORKDATA Data Set** section.

Valid workshift data sets contain numeric variables only. If the selected data set does not contain any numeric variables, an attention window is raised.

When you have made the necessary selections, the workshift data set is imported and the appropriate workshifts are created.

For a description of standard import options, see the “**Standard Import Options**” section on page 782.

**Library**

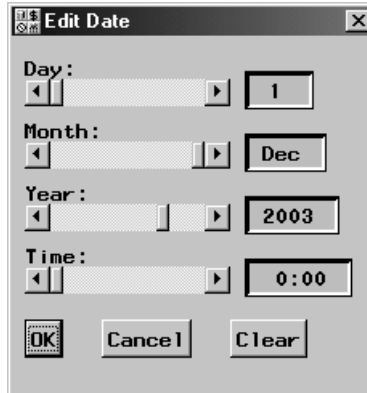
This list contains all currently defined SAS library names. Use this list to select the library that contains the data set that you want to import. Selection of a library automatically populates the **Datasets** list.

Datasets

This list contains the names of all SAS data sets that currently reside in the selected **library**. Select the data set that you want to import.

Edit Date Window

This window can be used to specify and/or modify date values. If no initial date is specified, the current date is used. To modify the date value, use the horizontal sliders to select the desired Day, Month, Year, and Time. Use the **OK** button to confirm the changes or the **Cancel** button to cancel the changes. The **Clear** button can be used to remove the date specification.



Chapter 9

The Earned Value Management Macros (Experimental)

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Chapter 9

The Earned Value Management Macros (Experimental)

Overview

Earned value refers to the amount of work that has been completed within a project to date. In Earned Value Management (EVM), this earned value is compared to the work that was planned, in order to measure project performance and to estimate future costs and project completion.

To see why an earned value analysis might be of interest, consider a four-week project with a planned completion cost of \$10,000. After one week, the Planned Value (PV) is one quarter of \$10,000, or \$2,500. Assume that only \$2,000 has been spent so far. This is the Actual Cost (AC). Also assume that only one fifth of the project has been completed. This gives an Earned Value (EV) of \$2,000, which is one fifth of the original planned completion cost. The amount of work accomplished for the cost incurred is as expected, but the project is progressing more slowly than expected. In other words, the project is behind schedule, but within its budgetary constraints.

Based upon the performance of the project so far, EVA can be used to forecast the funds required to complete the project, and to predict the project completion date. Historically, earned value measurements have been found to be reliable indicators of future project performance as early as the 15 to 20 % completion point (see Fleming and Koppelman 2000).

The cost performance is good for the four-week project, so the project is still expected to cost \$10,000 on completion. However, based on the schedule performance, the project duration is predicted to be five weeks instead of four weeks as originally planned. Additional estimates can provide upper and lower bounds on the project costs; these estimates are discussed in the “[Getting Started](#)” section on page 802.

In this chapter two distinct sets of macros are described: one for analysis and one for reporting. The first set, consisting of the %EVA_PLANNED_VALUE, %EVA_EARNED_VALUE, %EVA_METRICS, and %EVA_TASK_METRICS macros, is used to analyze schedule and cost data and to derive earned value metrics. The second set, consisting of the %EVG_COST_PLOT, %EVG_SCHEDULE_PLOT, %EVG_INDEX_PLOT, %EVG_VARIANCE_PLOT, %EVG_GANTT_CHART and %EVG_WBS_CHART macros, is used to graphically represent the results from the first set.

Note: To use the graphical macros, SAS/GRAPH must be licensed.

The %EVA_PLANNED_VALUE macro computes the periodic planned value for the project. The periodic planned value is the periodic cost that is to be incurred by the project and is derived from the planned schedule and costs, and the workday,

calendar, and holiday data sets. (These inputs are provided by the user.) The costs associated with an activity can be incurred continuously and/or at discrete time points. Continuously incurred costs are modeled by specifying a cost rate. For discretely incurred costs, the cost of the activity can be apportioned at the beginning (100-0), at the end (0-100), both equally (50-50), or both asymmetrically (custom), as desired. In general, costs can be incurred at evenly distributed time points over the duration of the associated activity, according to the number of weights specified. This macro can be run at any time—before, during, or after project execution.

Once the project is under way and actual schedule and cost information is available, the `%EVA_EARNED_VALUE` macro can be invoked to produce the revised periodic cost, along with periodic earned value. The set of periodic costs produced by `%EVA_PLANNED_VALUE` and `%EVA_EARNED_VALUE` can then be used in the `%EVA_METRICS` macro to generate earned value performance measurements and summary statistics for one or more status dates. In addition, the `%EVA_METRICS` macro computes cumulative costs, indices, and variances.

The `%EVA_TASK_METRICS` macro produces task-based performance measurements including Cost and Schedule Variance (CV and SV, respectively) and Cost and Schedule Performance Index (CPI and SPI, respectively).

The flow of data through the analysis macros is illustrated in [Figure 9.1](#). The large arrow indicates the passage of time between the planned schedule and budget and the updated schedule and budget.

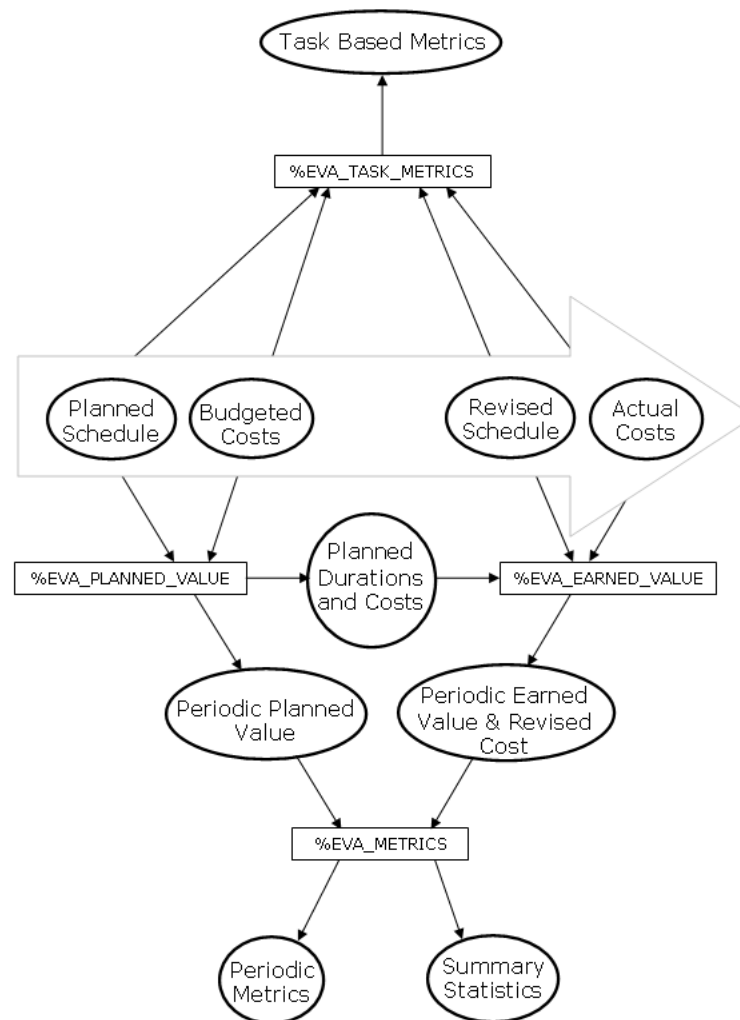


Figure 9.1. Analysis Macro Data Flow

The first of the graphics macros is `%EVG_COST_PLOT`. It is used to produce line plots of planned value, earned value, actual cost, and revised cost over time, using the output from the `%EVA_METRICS` macro. [Figure 9.2](#) illustrates the data flow for the `%EVG_COST_PLOT` macro.

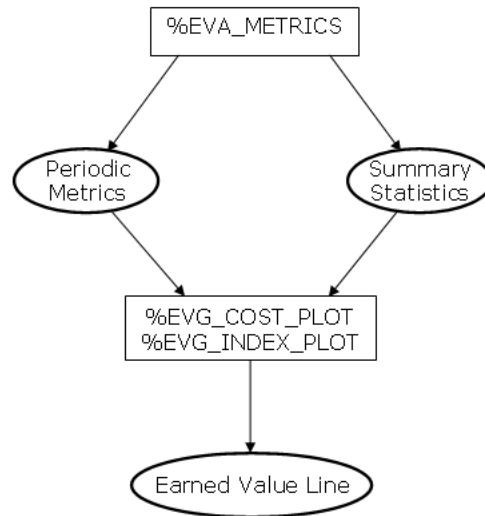


Figure 9.2. Graphics Macro Data Flow

The `%EVG_INDEX_PLOT` macro displays line plots of the Cost and Schedule Performance Indices (CPI and SPI, respectively), also using the output from the `%EVA_METRICS` macro. The CPI is the earned value per actual cost and the SPI is the earned value per planned value. [Figure 9.2](#) also shows the data flow for the `%EVG_INDEX_PLOT` macro.

The `%EVG_SCHEDULE_PLOT` macro is a schedule-oriented version of `%EVG_COST_PLOT`. The plot produced by `%EVG_SCHEDULE_PLOT` shows an estimate for the end date of the project. This estimate is an extrapolation of the current earned value to the BAC (Budget at Completion). The data flow is given in [Figure 9.3](#).

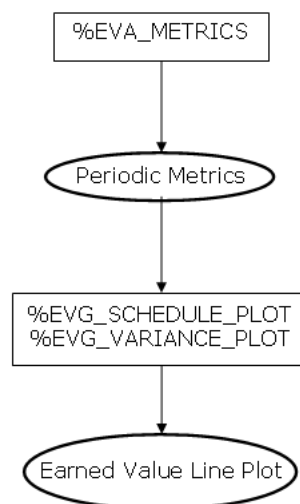


Figure 9.3. Graphics Macro Data Flow

`%EVG_VARIANCE_PLOT` uses the output from `%EVA_METRICS` to produce line

plots for the project Cost and Schedule Variance (CV and SV, respectively) over time. The CV is computed as the difference between the earned value and actual cost, whereas the SV is the difference between earned value and planned value. See [Figure 9.3](#) for the data flow.

The `%EVG_GANTT_CHART` macro uses the planned and revised schedule and budget, along with the output from the `%EVA_TASK_METRICS` macro, to produce a Gantt chart of the project activities, along with the CV and SV for each activity. A pictorial description of the data flow is given in [Figure 9.4](#).

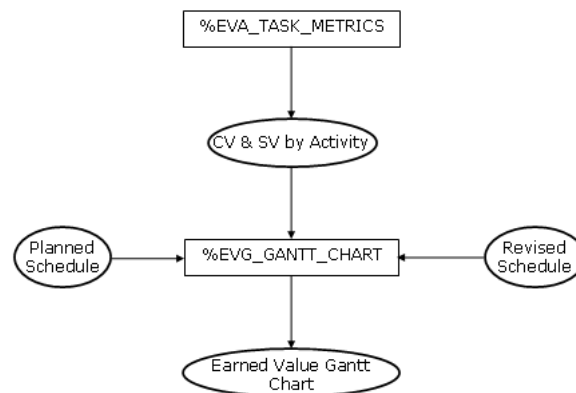


Figure 9.4. Graphics Macro Data Flow

Finally, for multiprojects, or projects with a task/subtask hierarchy, the `%EVG_WBS_CHART` macro is used to display the Work Breakdown Structure. The input data set for this macro contains the activity, the project to which it belongs (or alternatively, the Work Breakdown Structure code), and any miscellaneous data for each activity that is to be carried into the graphical output. The data flow is shown in [Figure 9.5](#).

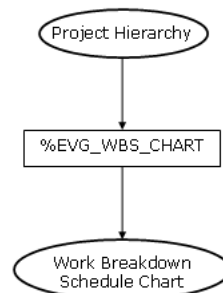


Figure 9.5. Graphics Macro Data Flow

Getting Started

Analysis

Generating Periodic Data Sets

Consider the following set of activities that constitute a software multiproject. The Project variable defines the project hierarchy and the Succesr1 and Succesr2 variables define the precedence relationships. The complete project data is shown in Figure 9.6.

```

data softin;
input Project $10.
      Activity $11.
      Description $22.
      Duration
      Succesr1 $9.
      Succesr2 $9.;
datalines;
      SWPROJ      Software project      .
DEBUG      RECODE      Recoding      5      DOCEDREV      QATEST
DOC      DOCEDREV      Doc. Edit and Revise      10      PROD
DOC      PRELDOC      Prel. Documentation      15      DOCEDREV      QATEST
MISC      MEETMKT      Meet Marketing      0      RECODE
MISC      PROD      Production      1
SWPROJ      DEBUG      Debug & Code Fixes      .
SWPROJ      DOC      Doc. Subproject      .
SWPROJ      MISC      Miscellaneous      .
SWPROJ      TEST      Test Subproject      .
TEST      QATEST      QA Test Approve      10      PROD
TEST      TESTING      Initial Testing      20      RECODE
;

```

Software Schedule Input						
Obs	Project	Activity	Description	Duration	Succesr1	Succesr2
1		SWPROJ	Software project	.		
2	DEBUG	RECODE	Recoding	5	DOCEDREV	QATEST
3	DOC	DOCEDREV	Doc. Edit and Revise	10	PROD	
4	DOC	PRELDOC	Prel. Documentation	15	DOCEDREV	QATEST
5	MISC	MEETMKT	Meet Marketing	0	RECODE	
6	MISC	PROD	Production	1		
7	SWPROJ	DEBUG	Debug & Code Fixes	.		
8	SWPROJ	DOC	Doc. Subproject	.		
9	SWPROJ	MISC	Miscellaneous	.		
10	SWPROJ	TEST	Test Subproject	.		
11	TEST	QATEST	QA Test Approve	10	PROD	
12	TEST	TESTING	Initial Testing	20	RECODE	

Figure 9.6. Software Schedule Input SOFTIN

The project network diagram showing the precedence relationships can be generated with the following code, using the NETDRAW procedure (see *SAS/OR User's Guide*:

Project Management, Chapter 5, for additional information). (Note that the first data step removes the root task to simplify the diagram.)

```

data softabridged;
  set softin;
  if activity ne 'SWPROJ' and project ne 'SWPROJ' then output;
run;
proc netdraw data=softabridged out=ndout graphics;
  actnet/act=activity font=swiss
  id=(description)
  nodefid
  nolabel
  succ=(succesr1 succesr2)
  lwidth=2
  coutline=black
  ctext=black
  carcs=black
  cnodefill=ltgray
  zone=project
  zonespace
  htext=3 pcompress
  centerid;
run;

```

The resulting diagram is shown in [Figure 9.7](#).

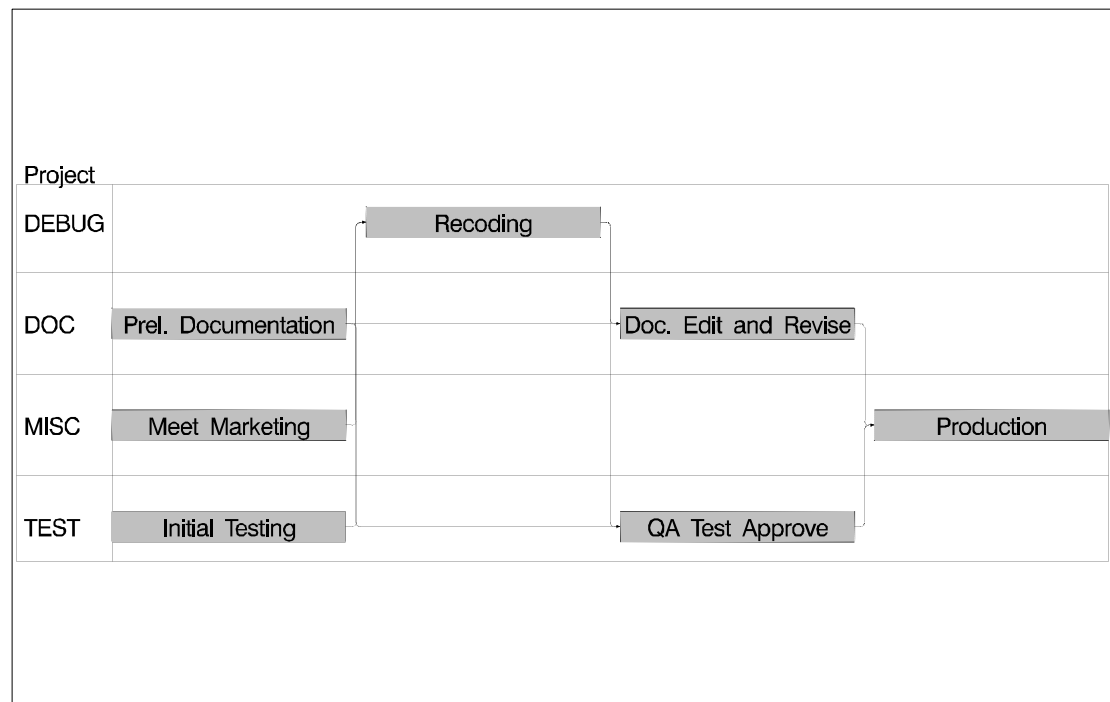


Figure 9.7. Project Network Diagram Using PROC NETDRAW

The project hierarchy, or Work Breakdown Structure (WBS), can be visualized with the following code. The details for the use of the %EVG_WBS_CHART macro are given in the “[Syntax](#)” section on page 826.

```

%evg_wbs_chart (
  structure=softin,
  activity=activity,
  project=project
);

```

The graphical output is shown in [Figure 9.8](#):

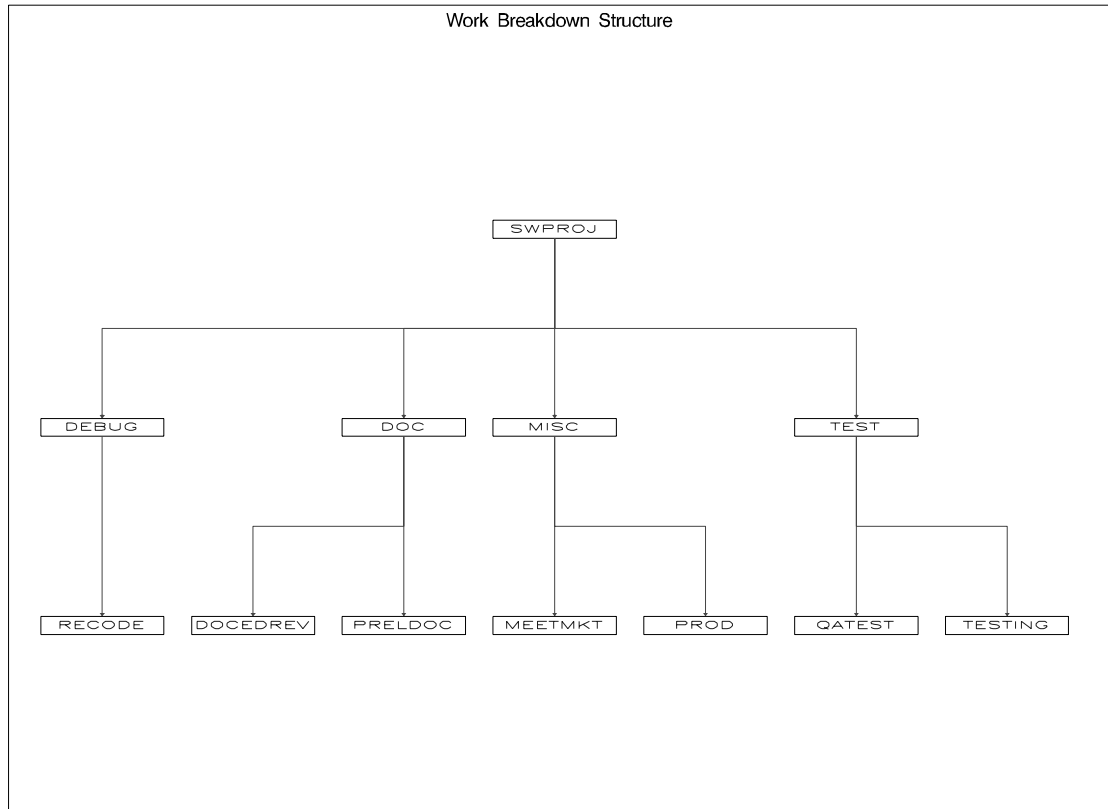


Figure 9.8. Work Breakdown Structure Using %EVG_WBS_CHART

The CPM procedure can be used as follows to generate a schedule based on the precedence and hierarchical constraints (see *SAS/OR User's Guide: Project Management*, Chapter 2, for more details).

```

proc cpm data=softin
  out=software
  interval=day
  date='01mar04'd;
  id description;
  project project / addwbs;
  activity activity;
  duration duration;
  successor succesr1 succesr2;
run;

```

The resulting schedule data set is manipulated to produce a data set containing the early and late schedules, shown in [Figure 9.9](#). The `WBS_CODE` variable gives the project hierarchy. The `E_START` and `E_FINISH` variables represent the early schedule, and the `L_START` and `L_FINISH` variables give the late schedule.

```
proc sort data=software;
  by wbs_code;
run;
proc print data=software;
  title 'Planned Schedule';
  var activity wbs_code e_start e_finish l_start l_finish;
run;
```

Planned Schedule						
Obs	Activity	WBS_CODE	E_START	E_FINISH	L_START	L_FINISH
1	SWPROJ	0	01MAR04	05APR04	01MAR04	05APR04
2	DEBUG	0.0	21MAR04	25MAR04	21MAR04	25MAR04
3	RECODE	0.0.0	21MAR04	25MAR04	21MAR04	25MAR04
4	DOC	0.1	01MAR04	04APR04	11MAR04	04APR04
5	DOCEDREV	0.1.0	26MAR04	04APR04	26MAR04	04APR04
6	PRELDOC	0.1.1	01MAR04	15MAR04	11MAR04	25MAR04
7	MISC	0.2	01MAR04	05APR04	21MAR04	05APR04
8	MEETMKT	0.2.0	01MAR04	01MAR04	21MAR04	21MAR04
9	PROD	0.2.1	05APR04	05APR04	05APR04	05APR04
10	TEST	0.3	01MAR04	04APR04	01MAR04	04APR04
11	QATEST	0.3.0	26MAR04	04APR04	26MAR04	04APR04
12	TESTING	0.3.1	01MAR04	20MAR04	01MAR04	20MAR04

Figure 9.9. Software Schedule SOFTWARE

A Gantt chart of this schedule can be produced with the `GANTT` procedure using the following code. (See *SAS/OR User's Guide: Project Management*, Chapter 4, for more details.)

```
title f=swiss h=4pct 'Project Master Schedule';
title2 f=swiss h=3pct;
proc gantt data=software;
  chart / mininterval=week pcompress
  top
  cframe=ltgray
  font=swiss
  height=1
  skip=2
  activity=activity
  nojobnum
  successor=(succesr1 succesr2)
  scale=10
  duration=duration;
  id description wbs_code;
run;
```

Figure 9.10 shows the output from this call to PROC GANTT.

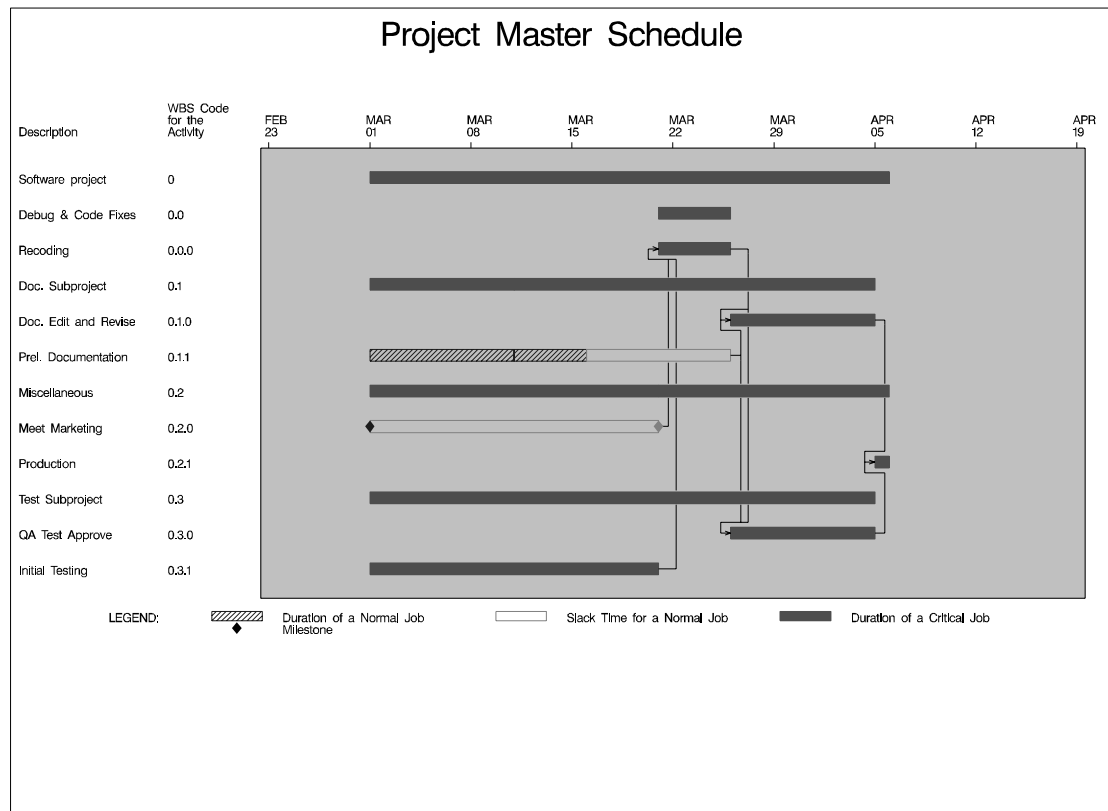


Figure 9.10. Initial Schedule Using PROC GANTT

Now suppose the early schedule is designated as the baseline. For the sake of clarity, the E_START and E_FINISH variables have been renamed to START and FINISH, respectively. Also, the variables required for performing the earned value analysis are retained. The modified data set is shown in Figure 9.11.

```

data software;
  set software;
  keep project activity duration description
      e_start e_finish wbs_code succesr1 succesr2;
  rename e_start = Start
         e_finish = Finish;
  label wbs_code = 'WBS Code'
        e_start = 'Start'
        e_finish = 'Finish';
  if duration eq . then duration = proj_dur;
run;

```

Planned Schedule						
Obs	Activity	WBS Code	Description	Duration	Start	Finish
1	SWPROJ	0	Software project	36	01MAR04	05APR04
2	DEBUG	0.0	Debug & Code Fixes	5	21MAR04	25MAR04
3	RECODE	0.0.0	Recoding	5	21MAR04	25MAR04
4	DOC	0.1	Doc. Subproject	35	01MAR04	04APR04
5	DOCEDREV	0.1.0	Doc. Edit and Revise	10	26MAR04	04APR04
6	PRELDOC	0.1.1	Prel. Documentation	15	01MAR04	15MAR04
7	MISC	0.2	Miscellaneous	36	01MAR04	05APR04
8	MEETMKT	0.2.0	Meet Marketing	0	01MAR04	01MAR04
9	PROD	0.2.1	Production	1	05APR04	05APR04
10	TEST	0.3	Test Subproject	35	01MAR04	04APR04
11	QATEST	0.3.0	QA Test Approve	10	26MAR04	04APR04
12	TESTING	0.3.1	Initial Testing	20	01MAR04	20MAR04

Figure 9.11. Software Schedule SOFTWARE

Assume also that each of the activities is budgeted to incur costs continuously at the rates shown in the RATES data set in [Figure 9.12](#).

Planned Rates		
Obs	Activity	Rate
1	SWPROJ	5
2	RECODE	6
3	PRELDOC	4
4	DOCEDREV	4
5	MEETMKT	.
6	PROD	2
7	TEST	1
8	DOC	1
9	MISC	1
10	DEBUG	1
11	TESTING	3
12	QATEST	4

Figure 9.12. Software Budget RATES

To determine the periodic budgeted costs, invoke the `%EVA_PLANNED_VALUE` macro as follows:

```
%eva_planned_value(
  plansched=software,      /* schedule data */
  activity=activity,
  start=start,
  finish=finish,
  duration=duration,
  budgetcost=rates,      /* cost data */
  rate=rate
);
```

The parameters used in this call to %EVA_PLANNED_VALUE are described in the following list. More details are given in the “Syntax” section on page 826.

- PLANSCHED= identifies the data set that contains the planned schedule.
- ACTIVITY= specifies the activity variable in the PLANSCHED= and BUDGETCOST= data sets.
- START= specifies the start date or datetime variable in the PLANSCHED= data set.
- FINISH= specifies the finish date or datetime variable in the PLANSCHED= data set.
- DURATION= specifies the task duration variable in the PLANSCHED= data set.
- BUDGETCOST= identifies the data set containing the budgeted costs.
- RATE= specifies the cost rate variable in the BUDGETCOST= data set.

The output data set generated by this call to %EVA_PLANNED_VALUE is shown in [Figure 9.13](#).

Daily Planned Value		
Obs	Date	PV Rate
1	01MAR04	15
2	02MAR04	15
3	03MAR04	15
4	04MAR04	15
5	05MAR04	15
6	06MAR04	15
7	07MAR04	15
8	08MAR04	15
9	09MAR04	15
10	10MAR04	15
11	11MAR04	15
12	12MAR04	15
13	13MAR04	15
14	14MAR04	15
15	15MAR04	15
16	16MAR04	11
17	17MAR04	11
18	18MAR04	11
19	19MAR04	11
20	20MAR04	11
21	21MAR04	15
22	22MAR04	15
23	23MAR04	15
24	24MAR04	15
25	25MAR04	15
26	26MAR04	16
27	27MAR04	16
28	28MAR04	16
29	29MAR04	16
30	30MAR04	16
31	31MAR04	16
32	01APR04	16
33	02APR04	16
34	03APR04	16
35	04APR04	16
36	05APR04	8

Figure 9.13. Periodic Planned Value Data Set Using %EVA_PLANNED_VALUE

Note that the “PV Rate” column shows the daily Planned Value (or Budgeted Cost of Work Scheduled). This is the cost incurred each day according to the plan or budget.

In general, once a project is in progress it is subject to uncertainties, the impact of which can often only be approximated in the original plan. Such uncertainties can affect the project schedule, project cost, or both. From a schedule standpoint an activity may be delayed due to a multitude of factors—a required resource being unavailable, a worker becoming sick, a machine breaking down, adverse weather conditions, etc. From a cost standpoint a contractor may revise his/her original estimate, the cost of raw materials may increase due to external factors, a sick or disabled worker might necessitate the use of a more costly contractor to minimize schedule slippage, etc.

Figure 9.14 lists the status of completed activities, and those in progress, as of March 25, 2004.

Actual Dates and Percentage Complete				
Obs	Activity	Start	Finish	Percent
1	MEETMKT	01MAR04	01MAR04	100
2	PRELDOC	01MAR04	14MAR04	100
3	TESTING	01MAR04	.	80

Figure 9.14. Software Project Status SOFTACT

Integrating this new information with the original schedule input data set gives the updated data set shown in [Figure 9.15](#).

```
proc sql;
  create table softupd as
    select project, softin.activity, duration,
           start, finish, percent, succesr1,
           succesr2, description
    from softin left join softact
    on softin.activity = softact.activity
    order by 1, 2
  ;
quit;
```

Schedule Input March 25								
Obs	Project	Activity	Duration	Start	Finish	Percent	Succesr1	Succesr2
1		SWPROJ	.	.	.	.
2	DEBUG	RECODE	5	.	.	.	DOCEDREV	QATEST
3	DOC	DOCEDREV	10	.	.	.	PROD	
4	DOC	PRELDOC	15	01MAR04	14MAR04	100	DOCEDREV	QATEST
5	MISC	MEETMKT	0	01MAR04	01MAR04	100	RECODE	
6	MISC	PROD	1	.	.	.		
7	SWPROJ	DEBUG	.	.	.	.
8	SWPROJ	DOC	.	.	.	.
9	SWPROJ	MISC	.	.	.	.
10	SWPROJ	TEST	.	.	.	.
11	TEST	QATEST	10	.	.	.	PROD	
12	TEST	TESTING	20	01MAR04	.	80	RECODE	

Figure 9.15. Updated Software Schedule Input SOFTUPD

Using this updated data set, PROC CPM is then invoked to create a new schedule.

```
proc cpm data=softupd
  out=software25
  interval=day
  date='01mar04'd;
  id description percent;
  project project / addwbs;
  activity activity;
  duration duration;
```



```

actual / as=start af=finish pctcomp=percent timenow='25MAR04'd;
successor succesr1 succesr2;
run;

data software25;
set software25;
keep project activity e_start e_finish percent wbs_code duration;
rename e_start = Start
       e_finish = Finish;
label wbs_code = 'WBS Code'
      e_start = 'Start'
      e_finish = 'Finish';
run;

```

The resulting schedule is shown alongside the planned schedule in [Figure 9.16](#).

Software Schedule as of March 25							
Obs	Activity	WBS Code	Planned Start	Planned Finish	Start	Finish	Percent
1	SWPROJ	0	01MAR04	05APR04	01MAR04	15APR04	.
2	DEBUG	0.0	21MAR04	25MAR04	31MAR04	04APR04	.
3	RECODE	0.0.0	21MAR04	25MAR04	31MAR04	04APR04	.
4	DOC	0.1	01MAR04	04APR04	01MAR04	14APR04	.
5	DOCEDREV	0.1.0	26MAR04	04APR04	05APR04	14APR04	.
6	PRELDOC	0.1.1	01MAR04	15MAR04	01MAR04	14MAR04	100
7	MISC	0.2	01MAR04	05APR04	01MAR04	15APR04	.
8	MEETMKT	0.2.0	01MAR04	01MAR04	01MAR04	01MAR04	100
9	PROD	0.2.1	05APR04	05APR04	15APR04	15APR04	.
10	TEST	0.3	01MAR04	04APR04	01MAR04	14APR04	.
11	QATEST	0.3.0	26MAR04	04APR04	05APR04	14APR04	.
12	TESTING	0.3.1	01MAR04	20MAR04	01MAR04	30MAR04	80

Figure 9.16. Updated Software Schedule SOFTWARE25

Notice that the activity PRELDOC has completed one day ahead of schedule. Despite this encouraging bit of news, the project is showing signs of slipping. Only one other activity has completed as of the status date. The original plan called for three activities to have completed, with two additional activities completing at the end of the day. Instead, five activities are in progress. The finish date for the root parent activity, SWPROJ, shows the magnitude of the project slippage so far.

The updated cost rate information is given in [Figure 9.17](#). Compared to the numbers listed in [Figure 9.12](#) the rates for the PRELDOC and TESTING activities have increased, while the rate for the RECODE activity has decreased. Note that the original rates still apply for the activities that are not listed here.

Actual Rates March 25		
Obs	Activity	Rate
1	PRELDOC	5
2	RECODE	5
3	TESTING	4

Figure 9.17. Actual Software Costs RATES25

To compute the impact of schedule slippage and cost overruns, data sets SOFTWARE25 and RATES25 can be specified for the %EVA_EARNED_VALUE macro as shown in the following SAS code. It is assumed that the %EVA_PLANNED_VALUE macro has been run, in which case the planned duration and costs are implicitly carried over to the %EVA_EARNED_VALUE macro as shown in Figure 9.1. Also, as before, the E_START and E_FINISH variables have been renamed to START and FINISH, respectively.

```
%eva_earned_value(
    revisesched=software25, /* revised schedule */
    activity=activity,
    start=start,
    finish=finish,
    actualcost=rates25,     /* actual costs */
    rate=rate
);
```

The parameters used in this call to %EVA_EARNED_VALUE are described briefly in the following list. More details are given in the “Syntax” section on page 826.

- REVISESCHED= identifies the data set that contains the revised schedule.
- ACTIVITY= specifies the activity variable in the REVISESCHED= and ACTUALCOST= data sets.
- START= specifies the start date or datetime variable in the REVISESCHED= data set.
- FINISH= specifies the finish date or datetime variable in the REVISESCHED= data set.
- ACTUALCOST= identifies the data set containing the revised cost. Activities not included are assigned the budgeted cost.
- RATE= specifies the cost rate variable in the ACTUALCOST= data set.

The variable names specified for the ACTIVITY=, START=, FINISH=, and RATE= parameters must be the same, respectively, as those previously specified for the %EVA_PLANNED_VALUE macro. This is to enable the later use of the %EVA_TASK_METRICS and %EVA_GANTT_CHART macros. The output generated by this call to %EVA_EARNED_VALUE is shown in Figure 9.18.

Daily Earned Value and Revised Cost			
Obs	Date	EV Rate	AC Rate
1	01MAR04	12.5369	17
2	02MAR04	12.5369	17
3	03MAR04	12.5369	17
4	04MAR04	12.5369	17
5	05MAR04	12.5369	17
6	06MAR04	12.5369	17
7	07MAR04	12.5369	17
8	08MAR04	12.5369	17
9	09MAR04	12.5369	17
10	10MAR04	12.5369	17
11	11MAR04	12.5369	17
12	12MAR04	12.5369	17
13	13MAR04	12.5369	17
14	14MAR04	12.5369	17
15	15MAR04	8.2512	12
16	16MAR04	8.2512	12
17	17MAR04	8.2512	12
18	18MAR04	8.2512	12
19	19MAR04	8.2512	12
20	20MAR04	8.2512	12
21	21MAR04	8.2512	12
22	22MAR04	8.2512	12
23	23MAR04	8.2512	12
24	24MAR04	8.2512	12
25	25MAR04	8.2512	12
26	26MAR04	8.2512	12
27	27MAR04	8.2512	12
28	28MAR04	8.2512	12
29	29MAR04	8.2512	12
30	30MAR04	8.2512	12
31	31MAR04	13.2512	14
32	01APR04	13.2512	14
33	02APR04	13.2512	14
34	03APR04	13.2512	14
35	04APR04	13.2512	14
36	05APR04	14.2512	16
37	06APR04	14.2512	16
38	07APR04	14.2512	16
39	08APR04	14.2512	16
40	09APR04	14.2512	16
41	10APR04	14.2512	16
42	11APR04	14.2512	16
43	12APR04	14.2512	16
44	13APR04	14.2512	16
45	14APR04	14.2512	16
46	15APR04	6.6957	8

Figure 9.18. Periodic Earned Value Data Set Using %EVA_EARNED_VALUE

The “EV Rate” column shows the daily Earned Value (or Budgeted Cost of Work Performed). This is the budgeted cost for the work that was actually accomplished each day. Up to the status date (TIMENOW) of March 25, 2004, the “AC Rate” column depicts the daily Actual Cost (or Actual Cost of Work Performed). After this date, this column represents estimated costs. For this estimate, it is assumed that activities that are in progress at the status date continue at the same cost rate, rather than reverting to the budgeted cost rate. This assumption

ultimately yields the revised Estimate At Completion (EAC_{rev}). Figure 9.19 shows the daily Planned Value, Earned Value, and Actual Cost together. The disparity in the number of observations (47 here versus the former 37 for the %EVA_PLANNED_VALUE macro) reflects a schedule slippage of 10 days.

Daily Planned Value, Earned Value, and Revised Cost				
Obs	DATE	PV Rate	EV Rate	AC Rate
1	01MAR04	15	12.5369	17
2	02MAR04	15	12.5369	17
3	03MAR04	15	12.5369	17
4	04MAR04	15	12.5369	17
5	05MAR04	15	12.5369	17
6	06MAR04	15	12.5369	17
7	07MAR04	15	12.5369	17
8	08MAR04	15	12.5369	17
9	09MAR04	15	12.5369	17
10	10MAR04	15	12.5369	17
11	11MAR04	15	12.5369	17
12	12MAR04	15	12.5369	17
13	13MAR04	15	12.5369	17
14	14MAR04	15	12.5369	17
15	15MAR04	15	8.2512	12
16	16MAR04	11	8.2512	12
17	17MAR04	11	8.2512	12
18	18MAR04	11	8.2512	12
19	19MAR04	11	8.2512	12
20	20MAR04	11	8.2512	12
21	21MAR04	15	8.2512	12
22	22MAR04	15	8.2512	12
23	23MAR04	15	8.2512	12
24	24MAR04	15	8.2512	12
25	25MAR04	15	8.2512	12
26	26MAR04	16	8.2512	12
27	27MAR04	16	8.2512	12
28	28MAR04	16	8.2512	12
29	29MAR04	16	8.2512	12
30	30MAR04	16	8.2512	12
31	31MAR04	16	13.2512	14
32	01APR04	16	13.2512	14
33	02APR04	16	13.2512	14
34	03APR04	16	13.2512	14
35	04APR04	16	13.2512	14
36	05APR04	8	14.2512	16
37	06APR04	.	14.2512	16
38	07APR04	.	14.2512	16
39	08APR04	.	14.2512	16
40	09APR04	.	14.2512	16
41	10APR04	.	14.2512	16
42	11APR04	.	14.2512	16
43	12APR04	.	14.2512	16
44	13APR04	.	14.2512	16
45	14APR04	.	14.2512	16
46	15APR04	.	6.6957	8

Figure 9.19. Periodic Planned Value, Earned Value, and Actual Cost

Results

The earned value metrics can now be computed using the following code:

```
%eva_metrics (timenow=' 25MAR04' d);
```

It is assumed that the %EVA_PLANNED_VALUE and %EVA_EARNED_VALUE macros have been run and that the default output data sets, PV and EV, were used. This enables the %EVA_METRICS macro to implicitly use those data sets as input (see Figure 9.1). If the default data set names were not used, you must specify the correct names using the PV= and EV= options.

The TIMENOW= parameter specifies the date or datetime to which the updated schedule and rates apply.

Figure 9.20 shows the output from the %EVA_METRICS macro.

Earned Value Analysis as of March 25, 2004	
Metric	Value
Percent Complete	50.91
PV (Planned Value)	355.00
EV (Earned Value)	266.28
AC (Actual Cost)	370.00
CV (Cost Variance)	-103.72
CV%	-38.95
SV (Schedule Variance)	-88.72
SV%	-24.99
CPI (Cost Performance Index)	0.72
SPI (Schedule Performance Index)	0.75
BAC (Budget At Completion)	523.00
EAC (Revised Estimate At Completion)	668.00
EAC (Overrun to Date)	626.72
EAC (Cumulative CPI)	726.72
EAC (Cumulative CPI X SPI)	845.57
ETC (Estimate To Complete)*	356.72
VAC (Variance At Completion)*	-203.72
VAC%*	-38.95
TCPI (BAC) (To-Complete Performance Index)	1.68
TCPI (EAC) (To-Complete Performance Index)*	0.72

* The CPI form of the EAC is used.

Figure 9.20. Earned Value Summary Metrics Using %EVA_METRICS

The metrics in Figure 9.20 reflect the condition of the project at the status date (TIMENOW). “Percent Complete” is the percentage of the planned work that has been accomplished. Values for this entry range from 0 to 100. PV is the Planned Value, or Budgeted Cost of Work Scheduled (BCWS). This is the work that was projected to have been completed. EV is the Earned Value, or Budgeted Cost of Work Performed (BCWP). This measure represents the value of work completed so far, in

terms of budgeted cost. AC is the Actual Cost of Work Performed (ACWP), and represents the actual cost of the work so far.

At first glance, one might compare the Planned Value of \$355 to the Actual Cost of \$370, and conclude that costs are nearly on track. However, the Earned Value figure of \$266.28 puts these numbers in the proper perspective. This project is careening out of control with respect to schedule and costs.

CV and SV are the Cost and Schedule Variance, respectively. CV is the earned value less the amount spent. SV is the earned value less the planned value. CPI and SPI are the Cost and Schedule Performance indices, respectively, and are analogous to the CV and SV. The CPI and SPI are expressed as ratios, rather than differences. The value of 0.72 for CPI indicates a cost overrun situation in which the project has earned 72 cents for every dollar spent. The value of 0.75 for SPI foretells a late project, as only 75% of the planned work has been accomplished on the status date. BAC is the Budget at Completion and is the total budgeted cost of the project. EAC is the Estimate at Completion, and represents the projected total cost, given the current state of the project. For the first of the EAC metrics, EAC_{rev} , it is assumed that future work is performed at the revised rates. EAC_{rev} is computed by accumulating the “AC Rate” data found in the output data set from the %EVA_EARNED_VALUE macro. For EAC_{OTD} , the overrun to date estimate, it is assumed that future work will be done at the budgeted rate, which is typically not very realistic. The next two estimates take into account the performance of the project so far. EAC_{CPI} , or the cumulative CPI EAC, is widely regarded as one of the more accurate and reliable estimates, and is frequently used to provide a quick forecast of the project costs. By default, the EAC_{CPI} is used to compute the Variance at Completion (VAC) and one of the To-Complete Performance Index (TCPI) formulations, to follow. The cumulative CPI-times-SPI EAC, denoted $EAC_{CPI \times SPI}$, is often used to provide a high-end estimate of the project costs. ETC is the Estimate to Complete, or a projection of remaining costs. The VAC represents the financial impact of the expenditures to date on the original budget.

The TCPI is the cost performance factor that must be achieved in order to complete the remaining work using the available funds. The available funds can be defined to be either the remaining budget ($BAC - AC$) or remaining costs ($EAC - AC$). For example, the $TCPI_{BAC}$ of 1.68 indicates that the project needs to earn 1.68 dollars for each dollar spent to stay within the budget. The $TCPI_{EAC}$ is a far lower value (0.72) because the revised costs are much larger than the budgeted costs for the remaining work. See [Table 9.11](#), [Table 9.12](#), and [Table 9.13](#) for formula expressions of the preceding metrics.

[Figure 9.21](#) gives a listing of the earned value summary statistics data set produced by the %EVA_METRICS macro. This data set is used to generate the %EVA_METRICS report as well as some of the charts to be described in later sections.

Earned Value Summary Statistics			
Obs	Name	Label	March 25, 2004
1	_pctcomp_	Percent Complete	50.914
2	_pv_	PV (Planned Value)	355.000
3	_ev_	EV (Earned Value)	266.280
4	_ac_	AC (Actual Cost)	370.000
5	_cv_	CV (Cost Variance)	-103.720
6	_cvp_	CV%	-38.951
7	_sv_	SV (Schedule Variance)	-88.720
8	_svp_	SV%	-24.991
9	_cpi_	CPI (Cost Performance Index)	0.720
10	_spi_	SPI (Schedule Performance Index)	0.750
11	_bac_	BAC (Budget At Completion)	523.000
12	_eacrev_	EAC (Revised Estimate At Completion)	668.000
13	_eacotd_	EAC (Overrun to Date)	626.720
14	_eaccpi_	EAC (Cumulative CPI)	726.716
15	_eaccpispi_	EAC (Cumulative CPI X SPI)	845.567
16	_etc_	ETC (Estimate To Complete)*	356.716
17	_vac_	VAC (Variance At Completion)*	-203.716
18	_vacp_	VAC%*	-38.951
19	_tcpi_	TCPI (BAC) (To-Complete Performance Index)	1.678
20	_etcpi_	TCPI (EAC) (To-Complete Performance Index)*	0.720

Figure 9.21. Summary Earned Value Data Set Using %EVA_METRICS

The %EVA_METRICS macro also produces the cumulative periodic earned value data set shown in [Figure 9.22](#). This data set contains the cumulative planned value, earned value, and actual and revised costs, together with the associated variances and performance indices.

Earned Value Cumulative Periodic Metrics Values, Costs, Variances and Indices									
Obs	Date	PV	EV	AC	Revised Cost	CV	SV	CPI	SPI
1	01MAR04	15	12.537	17	17	-4.463	-2.4631	0.73747	0.83579
2	02MAR04	30	25.074	34	34	-8.926	-4.9262	0.73747	0.83579
3	03MAR04	45	37.611	51	51	-13.389	-7.3892	0.73747	0.83579
4	04MAR04	60	50.148	68	68	-17.852	-9.8523	0.73747	0.83579
5	05MAR04	75	62.685	85	85	-22.315	-12.3154	0.73747	0.83579
6	06MAR04	90	75.222	102	102	-26.778	-14.7785	0.73747	0.83579
7	07MAR04	105	87.758	119	119	-31.242	-17.2415	0.73747	0.83579
8	08MAR04	120	100.295	136	136	-35.705	-19.7046	0.73747	0.83579
9	09MAR04	135	112.832	153	153	-40.168	-22.1677	0.73747	0.83579
10	10MAR04	150	125.369	170	170	-44.631	-24.6308	0.73747	0.83579
11	11MAR04	165	137.906	187	187	-49.094	-27.0939	0.73747	0.83579
12	12MAR04	180	150.443	204	204	-53.557	-29.5569	0.73747	0.83579
13	13MAR04	195	162.980	221	221	-58.020	-32.0200	0.73747	0.83579
14	14MAR04	210	175.517	238	238	-62.483	-34.4831	0.73747	0.83579
15	15MAR04	225	183.768	250	250	-66.232	-41.2319	0.73507	0.81675
16	16MAR04	236	192.019	262	262	-69.981	-43.9807	0.73290	0.81364
17	17MAR04	247	200.271	274	274	-73.729	-46.7295	0.73091	0.81081
18	18MAR04	258	208.522	286	286	-77.478	-49.4783	0.72910	0.80822
19	19MAR04	269	216.773	298	298	-81.227	-52.2271	0.72743	0.80585
20	20MAR04	280	225.024	310	310	-84.976	-54.9758	0.72588	0.80366
21	21MAR04	295	233.275	322	322	-88.725	-61.7246	0.72446	0.79076
22	22MAR04	310	241.527	334	334	-92.473	-68.4734	0.72313	0.77912
23	23MAR04	325	249.778	346	346	-96.222	-75.2222	0.72190	0.76855
24	24MAR04	340	258.029	358	358	-99.971	-81.9710	0.72075	0.75891
25	25MAR04	355	266.280	370	370	-103.720	-88.7198	0.71968	0.75009
26	26MAR04	371	.	.	382	.	.	.	.
27	27MAR04	387	.	.	394	.	.	.	.
28	28MAR04	403	.	.	406	.	.	.	.
29	29MAR04	419	.	.	418	.	.	.	.
30	30MAR04	435	.	.	430	.	.	.	.
31	31MAR04	451	.	.	444	.	.	.	.
32	01APR04	467	.	.	458	.	.	.	.
33	02APR04	483	.	.	472	.	.	.	.
34	03APR04	499	.	.	486	.	.	.	.
35	04APR04	515	.	.	500	.	.	.	.
36	05APR04	523	.	.	516	.	.	.	.
37	06APR04	.	.	.	532	.	.	.	.
38	07APR04	.	.	.	548	.	.	.	.
39	08APR04	.	.	.	564	.	.	.	.
40	09APR04	.	.	.	580	.	.	.	.
41	10APR04	.	.	.	596	.	.	.	.
42	11APR04	.	.	.	612	.	.	.	.
43	12APR04	.	.	.	628	.	.	.	.
44	13APR04	.	.	.	644	.	.	.	.
45	14APR04	.	.	.	660	.	.	.	.
46	15APR04	.	.	.	668	.	.	.	.

Figure 9.22. Cumulative Earned Value Data Set Using %EVA_METRICS

The cost and schedule variance by activity can now be produced using the following call to %EVA_TASK_METRICS.


```

%eva_task_metrics (
    plansched=software,
    revisesched=software25,
    activity=activity,
    start=start,
    finish=finish,
    budgetcost=rates,
    actualcost=rates25,
    rate=rate,
    aggregate=Y,
    timenow=' 25MAR04' d
);

```

The parameters used in this call to %EVA_TASK_METRICS are described briefly in the following list. More details are given in the “Syntax” section on page 826.

- PLANSCHED= identifies the data set that contains the planned schedule.
- REVISESCHEDED= identifies the data set that contains the updated schedule.
- ACTIVITY= specifies the activity variable in the PLANSCHED= and REVISESCHEDED= data sets.
- START= specifies the start date or datetime variable in the PLANSCHED= and REVISESCHEDED= data sets.
- FINISH= specifies the finish date or datetime variable in the PLANSCHED= and REVISESCHEDED= data sets.
- BUDGETCOST= identifies the data set containing the budgeted cost.
- ACTUALCOST= identifies the data set containing the revised cost.
- RATE= specifies the cost rate variable in the BUDGETCOST= and ACTUALCOST= data sets.
- AGGREGATE= indicates whether or not to roll up values along the project hierarchy; a value of Y indicates that aggregation is to be performed.
- TIMENOW= specifies the date or datetime of the updated schedule and costs.

Note that the variable names specified for the ACTIVITY=, START=, FINISH=, and RATE= parameters must be the same, respectively, as those previously specified for the %EVA_PLANNED_VALUE and %EVA_EARNED_VALUE macros.

The output produced by this invocation of the %EVA_TASK_METRICS macro is shown in [Figure 9.23](#).

Earned Value Analysis by Activity as of March 25, 2004						
Obs	Activity	WBS Code	PV	EV	AC	CV
1	SWPROJ	0	355.00	266.28	370.00	-103.72
2	DEBUG	0.0	35.00	0.00	0.00	0.00
3	RECODE	0.0.0	30.00	0.00	0.00	0.00
4	DOC	0.1	85.00	79.44	95.00	-15.56
5	DOCEDREV	0.1.0	0.00	0.00	0.00	0.00
6	PRELDOC	0.1.1	60.00	60.00	70.00	-10.00
7	MISC	0.2	25.00	19.57	25.00	-5.43
8	MEETMKT	0.2.0	0.00	0.00	0.00	0.00
9	PROD	0.2.1	0.00	0.00	0.00	0.00
10	TEST	0.3	85.00	69.44	125.00	-55.56
11	QATEST	0.3.0	0.00	0.00	0.00	0.00
12	TESTING	0.3.1	60.00	50.00	100.00	-50.00

Obs	CV%	SV	SV%	CPI	SPI
1	-38.95	-88.72	-24.99	0.72	0.75
2	0.00	-35.00	-100.00	.	0.00
3	0.00	-30.00	-100.00	.	0.00
4	-19.58	-5.56	-6.54	0.84	0.93
5	0.00	0.00	0.00	.	.
6	-16.67	0.00	0.00	0.86	1.00
7	-27.78	-5.43	-21.74	0.78	0.78
8	0.00	0.00	0.00	.	.
9	0.00	0.00	0.00	.	.
10	-80.00	-15.56	-18.30	0.56	0.82
11	0.00	0.00	0.00	.	.
12	-100.00	-10.00	-16.67	0.50	0.83

Figure 9.23. Cost and Schedule Variance by Activity Using %EVA_TASK_METRICS

Note that by specifying Y for the AGGREGATE= parameter, the values have been rolled up along the project hierarchy; otherwise, the values would represent the corresponding activity only.

Charts

In [Figure 9.24](#), cost and schedule variance are plotted against time using a default invocation of the %EVG_VARIANCE_PLOT macro. Notice that the variances lie outside the plus or minus 10% Planned Value thresholds, which is a cause for concern.

```
%evg_variance_plot;
```

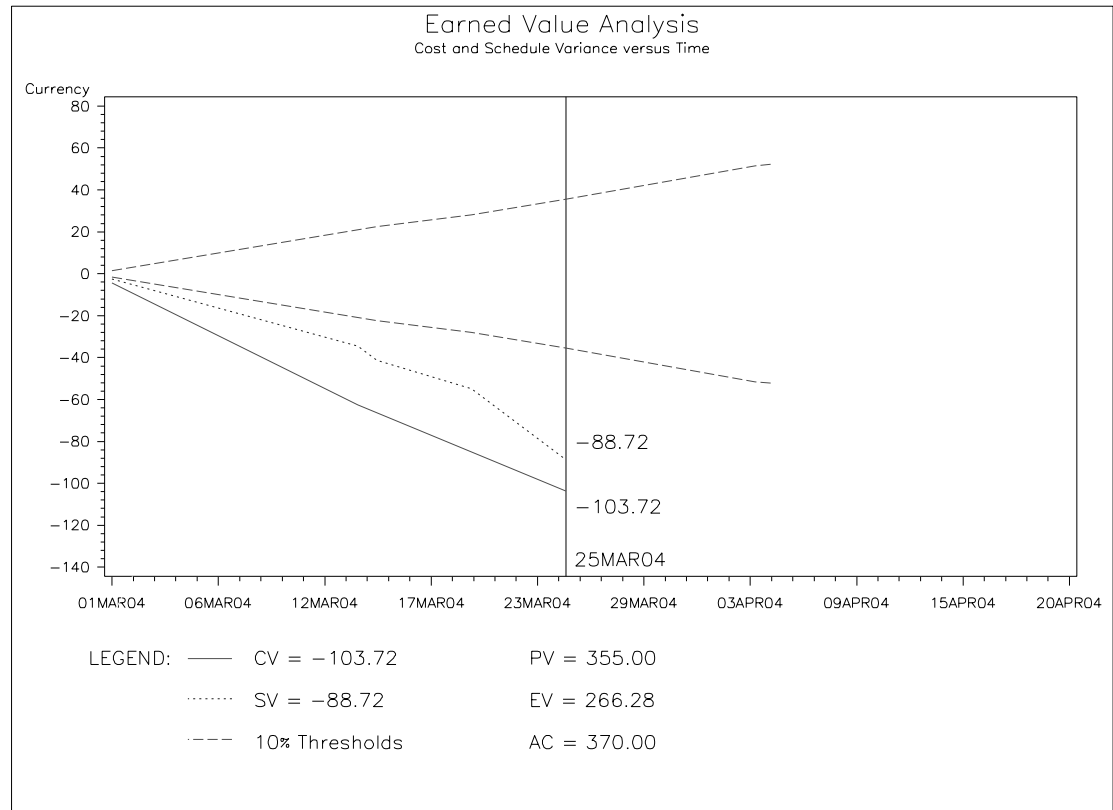


Figure 9.24. CV and SV versus Time Using %EVG_VARIANCE_PLOT

Although not apparent from the preceding chart, as any project nears completion its schedule variance tends toward zero. This is because the earned value eventually converges to the planned value.

Note that the %EVA_METRICS macro must have been called prior to this invocation in order to generate the METRICS= data set.

The cost and schedule variance can also be displayed by activity on a Gantt chart with the %EVG_GANTT_CHART macro, as follows.

```
%evg_gantt_chart (
    plansched=software,
    revisesched=software25,
    duration=duration,
    start=start,
    finish=finish,
    activity=activity,
    timenow=' 25MAR04'd,
    id=wbs cv sv cpi spi,
    height=3,
    scale=20
);
```

Figure 9.25 depicts cost and schedule variance, in addition to the cost and schedule performance indices, with a Gantt-style schedule. Note that two bars are used to represent each activity. The top bar is the revised schedule and the bottom bar is the baseline schedule.

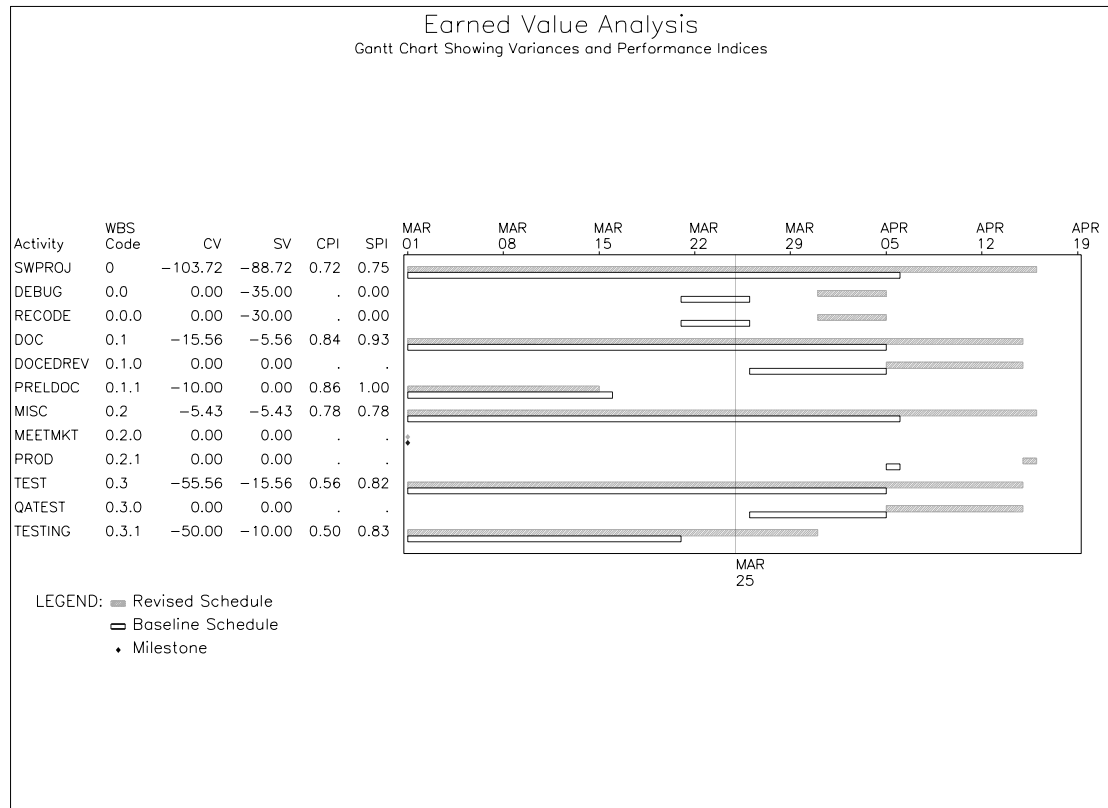


Figure 9.25. CV and SV by Task Using %EVG_GANTT_CHART

The parameters used in this call to %EVG_GANTT_CHART are described briefly in the following list. More details are given in the “Syntax” section on page 826.

- PLANSCHED= identifies the data set containing the planned schedule.
- REVISESCHED= identifies the data set that contains the updated schedule.
- ACTIVITY= specifies the activity variable in the PLANSCHED= and REVISESCHED= data sets.
- START= specifies the start date or datetime variable in the PLANSCHED= and REVISESCHED= data sets.
- FINISH= specifies the finish date or datetime variable in the PLANSCHED= and REVISESCHED= data sets.
- DURATION= specifies a duration variable in the PLANSCHED= or REVISESCHED= data set. If the variable is present in both data sets, the REVISESCHED= data set is chosen as the source for the variable values. This variable is only used for differentiating milestones from single day tasks.

- **TIMENOW=** specifies the date or datetime of the updated schedule and costs.
- **ID=** specifies the variable(s) to be included in the Gantt chart.
- **HEIGHT=** specifies a height factor for all text in PROC GANTT. (See the **HEIGHT=** option for the CHART statement of PROC GANTT (*SAS/OR User's Guide: Project Management*, Chapter 4) for more details.)
- **SCALE=** specifies the relative size adjustment of the data columns and chart. (See the **SCALE=** option for the CHART statement of PROC GANTT (*SAS/OR User's Guide: Project Management*, Chapter 4) for more details.)

This macro relies on the output data set (named **TASKMETS** by default) that is generated by **%EVA_TASK_METRICS**. The **TASKMETRICS=** parameter is used by both **%EVA_TASK_METRICS** and **%EVG_GANTT_CHART** to specify a different data set name. More details are given in the “**Syntax**” section on page 826.

The **%EVG_INDEX_PLOT** macro is used to generate a line plot of the cost and schedule performance indices, along with the to-complete performance index. The output generated by a default invocation is shown in [Figure 9.26](#). Recall that **CPI** is the ratio of earned value to actual cost, and **SPI** is the ratio of earned value to planned value. Also, **TCPI_{BAC}** is the ratio of work remaining to the remaining budget.

```
%evg_index_plot;
```

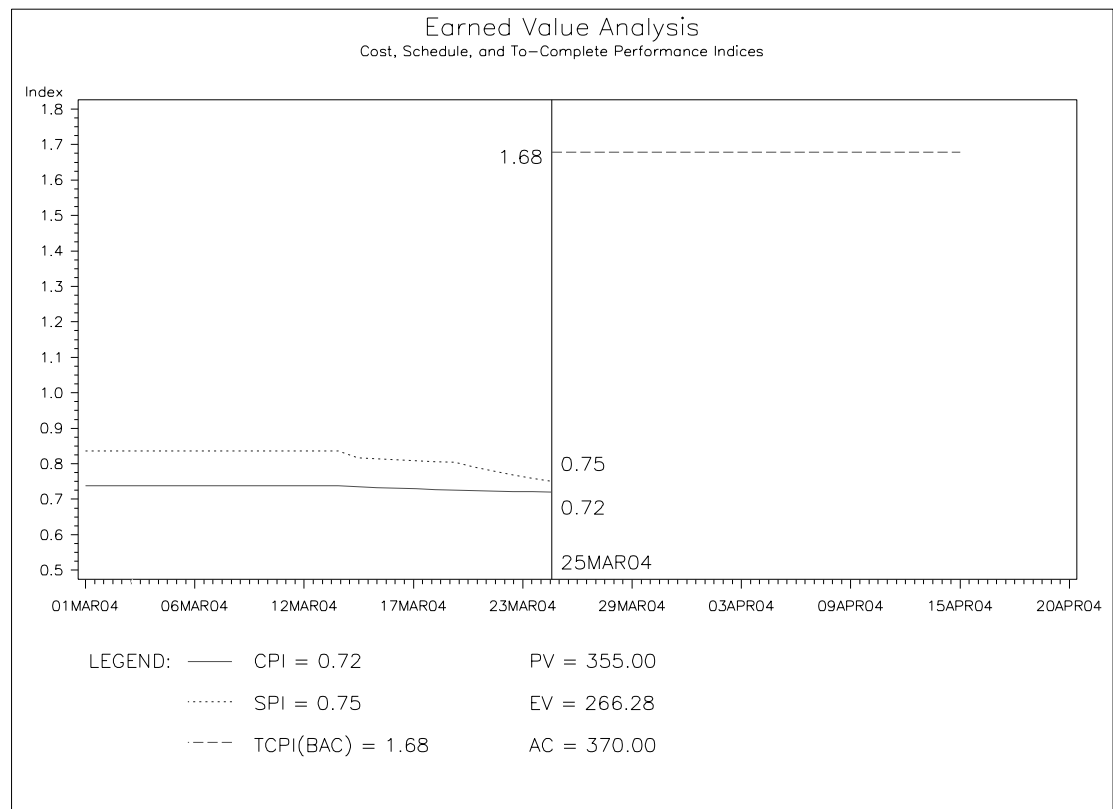


Figure 9.26. CPI, SPI, and TCPI Using **%EVG_INDEX_PLOT**

The CPI and SPI plots show a poor cost and schedule performance. Therefore the $TCPI_{BAC}$, an indicator of the performance required to get back on track, is relatively high.

Note that the %EVA_METRICS macro must have been called prior to this invocation in order to generate the METRICS= and SUMMARY= data sets.

The %EVG_COST_PLOT macro is used to plot the Budgeted Cost of Work Scheduled (or Planned Value), Budgeted Cost of Work Performed (or Earned Value), Actual Cost of Work Performed (or simply Actual Cost), and revised Estimate at Completion (EAC_{rev}) against time. The output from this macro is shown in Figure 9.27.

```
%evg_cost_plot;
```

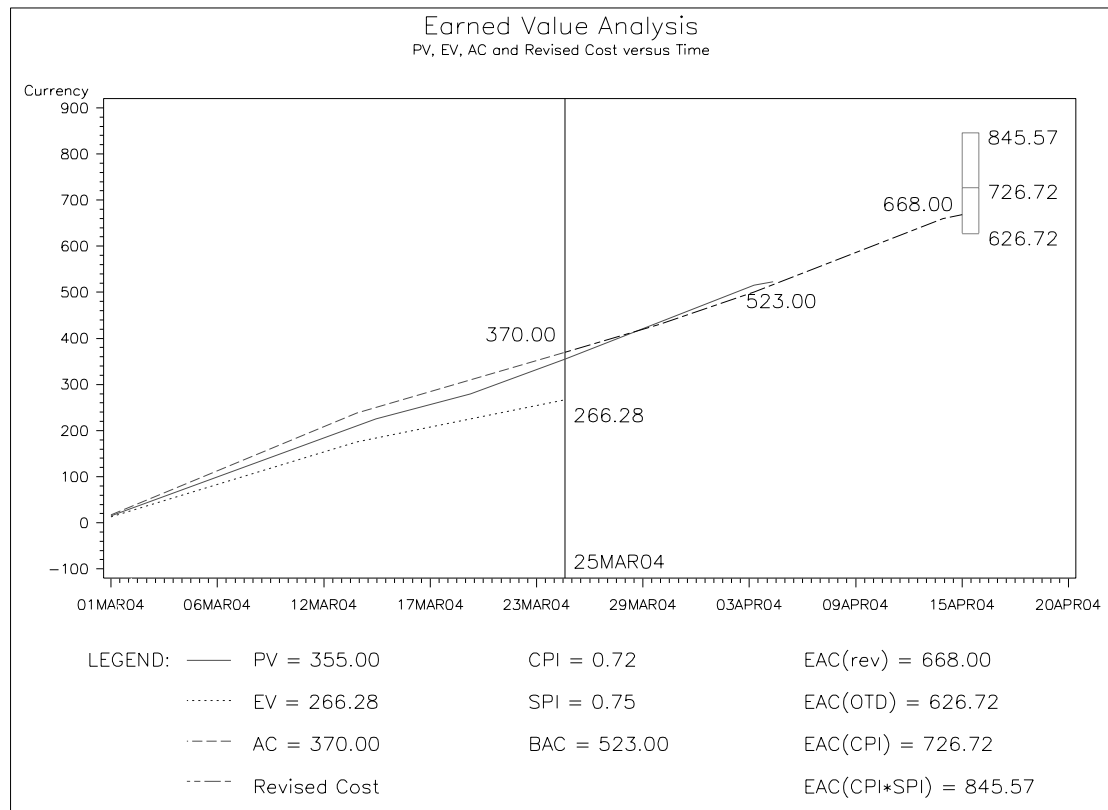


Figure 9.27. PV, EV, AC, and EAC_{rev} versus Time Using %EVG_COST_PLOT

The EAC_{rev} value of \$668 depicted in Figure 9.27 is the sum of the actual costs so far and the revised cost of the future work. In other words, it is the sum of the “AC Rate” column in the output data set of the %EVA_EARNED_VALUE macro. With the optimistic EAC_{OTD} value of \$626.72, it is assumed that the remaining work will be completed according to the original budget. A more realistic value of \$726.72 is shown for the EAC_{CPI} . Finally, the “upper bound” estimate of \$845.57 is given by the $EAC_{CPI \times SPI}$.

Note that the %EVA_METRICS macro must have been called prior to this invocation in order to generate the METRICS= and SUMMARY= data sets.

The %EVG_SCHEDULE_PLOT macro can be used to show planned, revised, and projected completion dates as pictured in Figure 9.28.

```
%evg_schedule_plot;
```

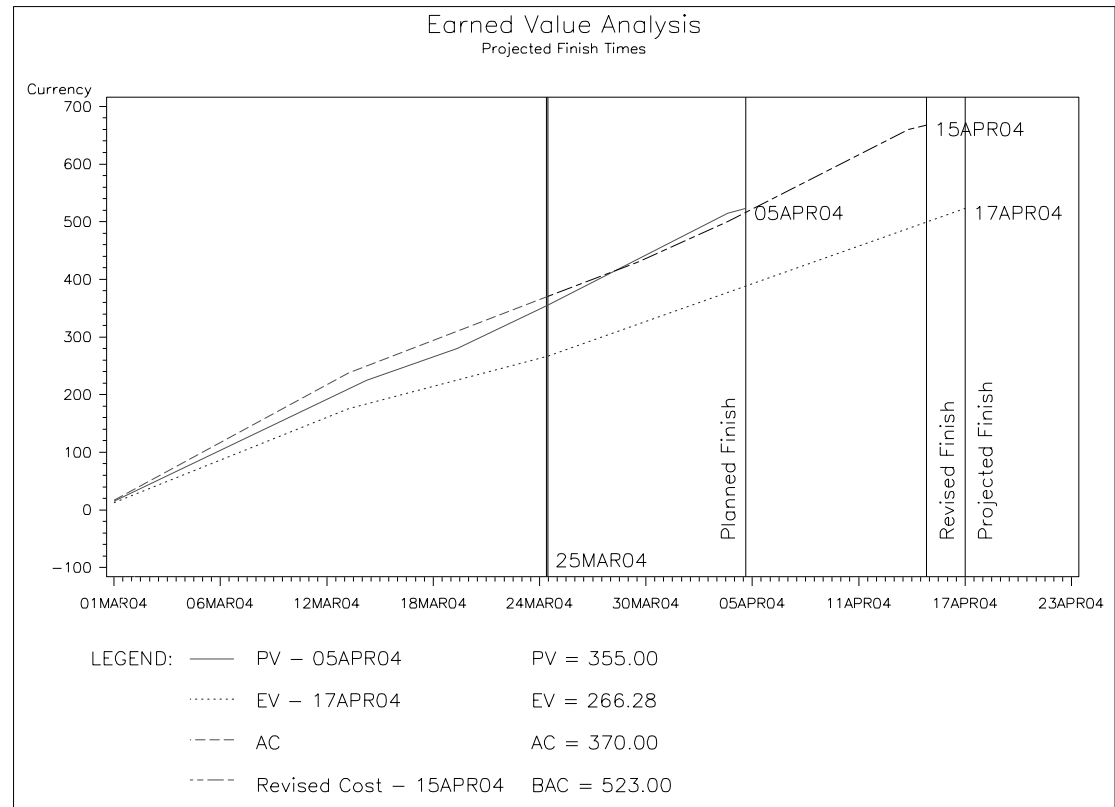


Figure 9.28. Projected Completion Dates Using %EVG_SCHEDULE_PLOT

In Figure 9.28, the current date (25MAR04) and planned end date (05APR04) are marked with vertical lines, as is the completion date according to the revised schedule (15APR04). The rightmost vertical line marks the projected finish time based upon the rate at which earned value has accumulated so far. This slope is used to extend the current earned value to the Budget at Completion (BAC) value of \$523, providing a prediction of the completion date.

Note that the %EVA_METRICS macro must have been called prior to this invocation in order to generate the METRICS= data set.

Using the software schedule data set as input, the %EVG_WBS_CHART macro can be utilized to produce the Work Breakdown Structure seen in Figure 9.8.

Syntax

Analysis

The following macros are available for earned value analysis.

```
%EVA_PLANNED_VALUE ( parameters ) ;
%EVA_EARNED_VALUE ( parameters ) ;
%EVA_METRICS < ( parameters ) > ;
%EVA_TASK_METRICS ( parameters ) ;
```

The role of each of these macros is illustrated in [Figure 9.29](#).

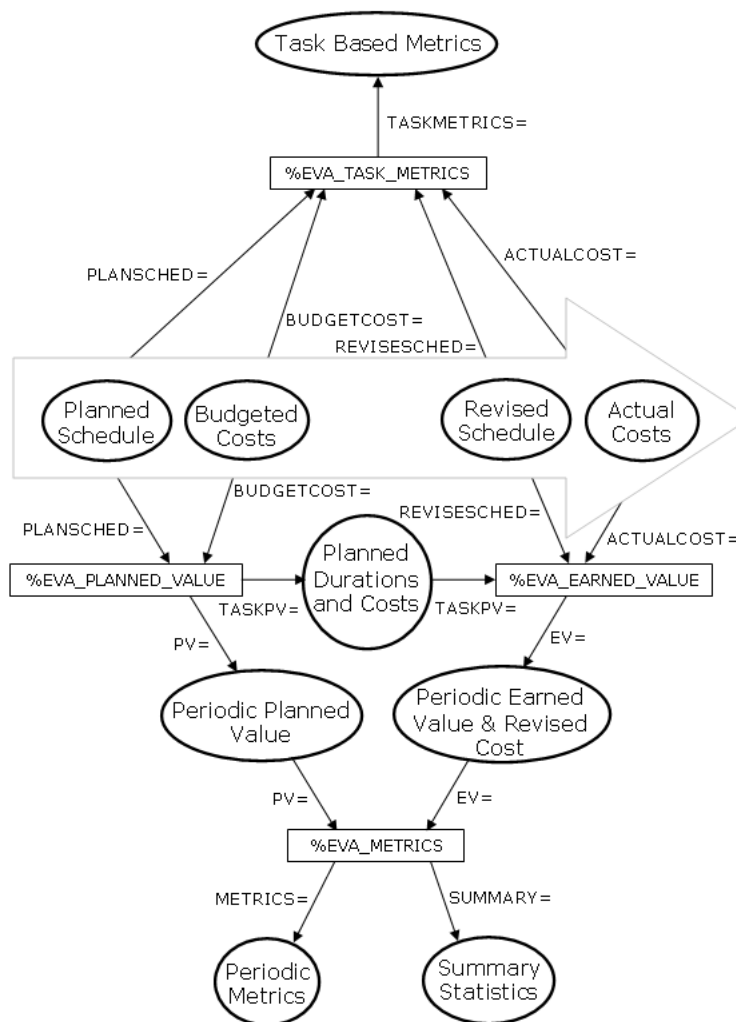


Figure 9.29. Analysis Macro Data Flow

%EVA_PLANNED_VALUE

This macro is used to produce the periodic planned value.

```
%EVA_PLANNED_VALUE ( parameters );
```

Required Parameters

ACTIVITY=*variable*

specifies the activity variable in the PLANSCHED= and BUDGETCOST= data sets.

BUDGETCOST=*SAS-data-set*

PLANCOST=*SAS-data-set*

identifies the input data set containing the budgeted cost rates for each activity.

PLANSCHED=*SAS-data-set*

identifies the input data set containing the planned schedule.

START=*variable*

specifies the start date or datetime variable in the PLANSCHED= data set.

Optional Parameters

CALENDAR=*SAS-data-set*

identifies the calendar input data set. (See the CALENDAR= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

COST=*variable*

specifies the cost variable in the BUDGETCOST= data set. This is the total of the start and finish costs associated with the given task. At least one of COST= or RATE= must be specified.

DURATION=*variable*

specifies the task duration variable in the PLANSCHED= data set. At least one of DURATION= or FINISH= must be specified. If both parameters are specified, the FINISH= variable value overrides a nonzero DURATION= variable value; i.e., duration is only used to indicate a milestone task.

FINISH=*variable*

specifies the finish date or datetime variable in the PLANSCHED= data set. At least one of FINISH= or DURATION= must be specified. If both parameters are specified, the FINISH= variable value overrides a nonzero DURATION= variable value; i.e., duration is only used to indicate a milestone task.

HOLIDATA=*SAS-data-set*

identifies the input data set that contains the holiday schedule. (See the HOLIDATA= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

HOLIDAY=*statement*

specifies the HOLIDAY statement to use for PROC CPM. For example:

```
%eva_planned_value(..., holiday=holiday start / holifin=finish, ...);
```

(See the HOLIDAY statement in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

INTERVAL=*interval*

specifies the units to use for the DURATION= variable values. (See the INTERVAL= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

MAXOBS=*max*

sets the limit on the number of allowable observations for the PV= data set. (See the MAXOBS= option of the RESOURCE statement and CPM procedure in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

NROUTCAL=*variable*

indicates which calendar is to be used for incrementing the _TIME_ variable in the BCOSTOUT= data set. (See the NROUTCAL= option of the RESOURCE statement and CPM procedure in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

PV=*SAS-data-set*

identifies the output data set that contains the periodic planned value. The frequency is determined by the INTERVAL= and ROUTINTERVAL= parameters. The default data set name is PV.

RATE=*variable*

specifies the cost rate variable in the BUDGETCOST= data set. This is the rate at which cost is incurred over the duration of the task. The variable containing this duration is specified with the DURATION= parameter. At least one of RATE= or COST= must be specified.

ROUTINTERVAL=*interval*

specifies the period between values in the PV= data set. (See the ROUTINTERVAL= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

SPCT=*variable*

specifies the start percentage variable in the BUDGETCOST= data set. This is the percentage of the COST= amount that is incurred at the beginning of the task. The default is zero, in which case the entire COST= amount is incurred at the completion of the task. The specified variable may also contain a comma-delimited list of weights to be used for distributing the cost at equal working intervals over the duration of the activity.

TASKPV=*SAS-data-set*

identifies the output data set that is used as input to the %EVA_EARNED_VALUE macro. This data set is used to store the planned duration and costs by activity, which are used by the %EVA_EARNED_VALUE macro to compute earned value (see [Figure 9.29](#)). The default data set name is TASKPV.

WORKDAY=*SAS-data-set*

identifies the workday input data set. (See the WORKDAY= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

Note that if a `WORKDAY=`, `CALENDAR=`, or `HOLIDAY=` data set is specified, the default variable name, `_CAL_`, is assumed for calendar identification.

Table 9.1 summarizes the parameters used for managing input and output data sets in the `%EVA_PLANNED_VALUE` macro.

Table 9.1. `%EVA_PLANNED_VALUE` I/O Parameter Summary

Type	Data Set	Variables
INPUT	BUDGETCOST	COST, RATE, SPCT
INPUT	CALENDAR	
INPUT	HOLIDATA	
INPUT	PLANSCHED	ACTIVITY, DURATION, FINISH, START
INPUT	WORKDAY	
OUTPUT	PV	
OUTPUT	TASKPV	

`%EVA_EARNED_VALUE`

This macro is used to produce the periodic earned value and actual cost.

`%EVA_EARNED_VALUE` (*parameters*);

Required Parameters

ACTIVITY=*variable*

specifies the activity variable in the `REVISESCHED=`, `ACTUALCOST=`, and `BUDGETCOST=` data sets.

ACTUALCOST=*SAS-data-set*

REVISECOST=*SAS-data-set*

identifies the updated costs input data set.

REVISESCHED=*SAS-data-set*

identifies the input data set containing the updated schedule.

START=*variable*

specifies the start date or datetime variable in the `REVISESCHED=` data set.

Optional Parameters**CALENDAR=SAS-data-set**

identifies the calendar input data set. (See the CALENDAR= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

COST=variable

specifies the cost variable in the ACTUALCOST= data set. This is the total of the start and finish costs associated with the given task. At least one of COST= or RATE= must be specified. This parameter is only allowed if used for %EVA_PLANNED_VALUE; further, the variable specified must be the same as that specified for %EVA_PLANNED_VALUE. If a variable is specified for this parameter, but the value for the variable is missing for a given observation, the corresponding value from the BUDGETCOST= data set is used.

DURATION=variable

specifies the task duration variable in the REVISESCHED= data set. At least one of DURATION= or FINISH= must be specified. If both parameters are specified, the FINISH= variable value overrides a nonzero DURATION= variable value; i.e., duration is only used to indicate a milestone task.

EV=SAS-data-set

identifies the output data set, which contains the periodic earned value and revised cost. The frequency is determined by the INTERVAL= and ROUTINTERVAL= parameters. The default data set name is EV.

FINISH=variable

specifies the finish date or datetime variable in the REVISESCHED= data set. At least one of FINISH= or DURATION= must be specified. If both parameters are specified, the FINISH= variable value overrides a nonzero DURATION= variable value; i.e., duration is only used to indicate a milestone task.

HOLIDATA=SAS-data-set

identifies the input data set that contains the holiday schedule. (See the HOLIDATA= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

HOLIDAY=statement

specifies the HOLIDAY statement to use for PROC CPM. For example:

```
%eva_earned_value(..., holiday=holiday start / holifin=finish, ...);
```

(See the HOLIDAY statement in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

INTERVAL=interval

specifies the units to use for the DURATION= variable values. (See the INTERVAL= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

MAXOBS=max

sets the limit on the number of allowable observations for the EV= data set. (See the MAXOBS= option of the RESOURCE statement and CPM procedure in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

NROUTCAL=variable

indicates which calendar is to be used for incrementing the `_TIME_` variable in the `ACOSTOUT=` data set. (See the `NROUTCAL=` option of the `RESOURCE` statement and CPM procedure in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

RATE=variable

specifies the cost rate variable in the `ACTUALCOST=` data set. This is the rate at which cost is incurred over the duration of the task. The variable containing this duration is specified with the `DURATION=` parameter. At least one of `RATE=` or `COST=` must be specified. This parameter is only allowed if used with `%EVA_PLANNED_VALUE`; further, the variable specified must be the same as that specified for `%EVA_PLANNED_VALUE`. If a variable is specified for this parameter, but the value for the variable is missing for a given observation, the corresponding value from the `BUDGETCOST=` data set is used.

ROUTINTERVAL=interval

specifies the period between values in the `EV=` data set. (See the `ROUTINTERVAL=` option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

SPCT=variable

specifies the start percentage variable in the `ACTUALCOST=` data set. This is the percentage of the `COST=` amount that is incurred at the beginning of the task. The default is zero, in which case the entire `COST=` amount is incurred at the completion of the task. The specified variable may also contain a comma-delimited list of weights to be used for distributing the cost at equal working intervals over the duration of the activity. This parameter is only allowed if used for `%EVA_PLANNED_VALUE`; further, the variable specified must be the same as that specified for `%EVA_PLANNED_VALUE`. If a variable is specified for this parameter, but the value for the variable is missing for a given observation, the corresponding value from the `BUDGETCOST=` data set will be used.

TASKPV=SAS-data-set

identifies the input data set containing the planned duration and costs by activity, which are used to compute earned value. This data set is generated by the `%EVA_PLANNED_VALUE` macro, with name specified by the `TASKPV=` parameter of the `%EVA_PLANNED_VALUE` macro (see [Figure 9.29](#)). The default data set name is `TASKPV`.

WORKDAY=SAS-data-set

identifies the workday input data set. (See the `WORKDAY=` option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

Note that if a `WORKDAY=`, `CALENDAR=`, or `HOLIDAY=` data set is specified, the default variable name, `_CAL_`, is assumed for calendar identification.

Also note that the variable names specified for the `ACTIVITY=`, `START=`, `FINISH=`, and `RATE=` parameters must be the same, respectively, as those previously specified for the `%EVA_PLANNED_VALUE` macro. This is to enable the subsequent use of the `%EVA_TASK_METRICS` and `%EVG_GANTT_CHART` macros.

Table 9.2 summarizes the parameters used for managing input and output data sets in the %EVA_EARNED_VALUE macro.

Table 9.2. %EVA_EARNED_VALUE I/O Parameter Summary

Type	Data Set	Variables
INPUT	ACTUALCOST	COST, RATE, SPCT
INPUT	CALENDAR	
INPUT	HOLIDATA	
INPUT	REVISESCHED	ACTIVITY, DURATION, FINISH, START
INPUT	TASKPV	COST, RATE, SPCT
INPUT	WORKDAY	
OUTPUT	EV	

%EVA_METRICS

This macro is used to generate summary statistics for the status date(s) requested, along with periodic metrics.

%EVA_METRICS < (*parameters*) > ;

Optional Parameters

ACRONYMS=*long*

specifies whether the long form of the earned value acronyms is to be used; e.g., BCWP versus EV. The short form is used unless the macro variable `_ACRONYMS_` is set to “long” or `ACRONYMS=long` is specified. The parameter overrides the macro variable setting; i.e., specifying any non-null value other than “long” for the `ACRONYMS=` parameter produces short forms.

EACFORM=*integer*

indicates the form of the EAC to be used in computing ETC, VAC, VAC percentage, and $TCPI_{EAC}$. The values are assigned as follows:

- 1 - EAC_{rev}
- 2 - EAC_{OTD}
- 3 - EAC_{CPI}
- 4 - $EAC_{CPI \times SPI}$

The default value is 3 for EAC_{CPI} .

EV=*SAS-data-set*

identifies the input data set containing the periodic earned value and actual cost. It is generated by the %EVA_EARNED_VALUE macro, with name specified by the `EV=` parameter of the %EVA_EARNED_VALUE macro. The default data set name is EV.

METRICS=*SAS-data-set*

identifies the periodic output data set containing earned value metrics. The default name of the periodic output data set is METRICS.

PV=SAS-data-set

identifies the input data set containing the periodic planned value. It is generated by the %EVA_PLANNED_VALUE macro, with name specified by the PV= parameter of the %EVA_PLANNED_VALUE macro. The default data set name is PV.

SUMMARY=SAS-data-set

identifies the output data set, which contains a summary of metrics derived with respect to the last time given by the TIMENOW= parameter. The default name of the summary output data set is SUMMARY.

TIMENOW=time(s)

specifies one or more reference dates ('ddmmyy'd) or datetimes ('ddmmmyy:hh:mm:ss'dt) delimited by whitespace, for the summary output. For example:

```
%eva_metrics (timenow=' 01SEP05' d ' 15SEP05:12:00:00' dt) ;
```

The list of dates or datetimes must be in chronological order. The default value is today's date, unless the macro variable _TIMENOW_ has been set, in which case the default is the latter.

Table 9.3 summarizes the parameters used for managing input and output data sets in the %EVA_METRICS macro.

Table 9.3. %EVA_METRICS I/O Parameter Summary

Type	Data Set
INPUT	EV
INPUT	PV
OUTPUT	METRICS
OUTPUT	SUMMARY

%EVA_TASK_METRICS

This macro is used to produce earned value measures for each task; these measures include Planned Value, Earned Value, Actual Cost, Cost and Schedule Variance, and Cost and Schedule Performance Index.

```
%EVA_TASK_METRICS ( parameters ) ;
```

Required Parameters**ACTIVITY=variable**

specifies the activity variable in the PLANSCHED= and REVISESCHED= data sets.

ACTUALCOST=SAS-data-set**REVISECOST=SAS-data-set**

identifies the updated costs data set.

BUDGETCOST=SAS-data-set**PLANCOST=SAS-data-set**

identifies the budgeted costs data set.

PLANSCHED=SAS-data-set

identifies the input data set that contains the planned schedule.

REVISESCHED=SAS-data-set

identifies the input data set that contains the updated schedule.

START=variable

specifies the start date or datetime variable in the PLANSCHED= and REVISESCHED= data sets.

Optional Parameters**ACRONYMS=long**

specifies whether the long form of the earned value acronyms is to be used; e.g., BCWP versus EV. The short form is used unless the macro variable `_ACRONYMS_` is set to “long” or `ACRONYMS=long` is specified. The parameter overrides the macro variable setting; i.e., specifying any non-null value other than “long” for the `ACRONYMS=` parameter produces short forms.

AGGREGATE=Y or otherwise

specifies whether or not to roll up values along the project hierarchy; a value of Y indicates that aggregation is to be carried out. No rollup is performed for the default behavior. The `WBSCODE=` parameter is required if `AGGREGATE=Y` is specified.

CALENDAR=SAS-data-set

identifies the calendar data set. (See the `CALENDAR=` option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

COST=variable

specifies the cost variable in the `BUDGETCOST=` and `ACTUALCOST=` data sets. This is the total of the start and finish costs associated with the given task. At least one of `COST=` or `RATE=` must be specified. If a variable is specified for this parameter, but the value for the variable is missing for a given observation, the corresponding value from the `BUDGETCOST=` data set is used.

DURATION=variable

specifies the task duration variable in the `PLANSCHED=` and `REVISESCHED=` data sets. At least one of `DURATION=` or `FINISH=` must be specified. If both parameters are specified, the `FINISH=` variable value overrides a nonzero `DURATION=` variable value; i.e., duration is only used to indicate a milestone task.

FINISH=variable

specifies the finish date or datetime variable in the `PLANSCHED=` and `REVISESCHED=` data sets. At least one of `FINISH=` or `DURATION=` must be specified. If both parameters are specified, the `FINISH=` variable value overrides a nonzero `DURATION=` variable value; i.e., duration is only used to indicate a milestone task.

HOLIDATA=SAS-data-set

identifies the holiday data set. (See the `HOLIDATA=` option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

HOLIDAY=statement

specifies the HOLIDAY statement to use for PROC CPM. For example:

```
%eva_task_metrics(..., holiday=holiday start / holifin=finish, ...);
```

(See the HOLIDAY statement in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

INTERVAL=interval

specifies the units to use for the DURATION= variable values. (See the INTERVAL= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

PCTCOMP=variable

specifies the percentage complete variable of the REVISESCHED= data set. Note that for a given activity, the specified percentage complete can appear to be in conflict with the amount of time spent, relative to the projected finish time for that activity. For example, even though 5 of 10 working days have elapsed, maybe only 30% of the activity has been completed. The input data reflects an anticipated acceleration in progress over the next five days. Also, if there is no value for the PCTCOMP= variable for a given activity, a computed value is substituted.

RATE=variable

specifies the cost rate variable in the BUDGETCOST= and ACTUALCOST= data sets. This is the rate at which cost is incurred over the DURATION= variable value for the given task. At least one of RATE= or COST= must be specified. If a variable is specified for this parameter, but the value for the variable is missing for a given observation, the corresponding value from the BUDGETCOST= data set is used.

SPCT=variable

specifies the start percentage variable in the BUDGETCOST= and ACTUALCOST= data sets. This is the percentage of the COST= amount that is incurred at the beginning of the task. The default is zero, in which case the entire COST= amount is incurred at the completion of the task. The specified variable may also contain a comma-delimited list of weights to be used for distributing the cost at equal working intervals over the duration of the activity. If a variable is specified for this parameter, but the value for the variable is missing for a given observation, the corresponding value from the BUDGETCOST= data set is used.

TASKMETRICS=SAS-data-set

identifies the output data set. The default data set name is TASKMETS.

TIMENOW=time

specifies the date ('ddmmyy'd) or datetime ('ddmmyy:hh:mm:ss'dt) of the updated schedule and costs. The default value is today's date unless the macro variable `_TIMENOW_` has been set, in which case the default is the latter.

WBSCODE=variable

specifies the variable containing the Work Breakdown Structure code in the PLANSCHED= or REVISESCHED= data set. The default variable name is WBS_CODE.

WORKDAY=SAS-data-set

identifies the workday input data set. (See the WORKDAY= option in Chapter 2 of *SAS/OR User's Guide: Project Management* for more details.)

Note that if a WORKDAY=, CALENDAR=, or HOLIDAY= data set is specified, the default variable name, `_CAL_`, is assumed for calendar identification.

Table 9.4 summarizes the parameters used for managing input and output data sets in the `%EVA_TASK_METRICS` macro.

Table 9.4. `%EVA_TASK_METRICS` I/O Parameter Summary

Type	Data Set	Variables
INPUT	ACTUALCOST	COST, RATE, SPCT
INPUT	BUDGETCOST	COST, RATE, SPCT
INPUT	CALENDAR	
INPUT	HOLIDATA	
INPUT	PLANSCHED	ACTIVITY, DURATION, FINISH, START, WBSCODE
INPUT	REVISESCHED	ACTIVITY, DURATION, FINISH, PCTCOMP, START, WBSCODE
INPUT	WORKDAY	
OUTPUT	TASKMETRICS	

Charts

The following macros are available for earned value charts and reports.

```
%EVG_COST_PLOT < ( parameters ) > ;
%EVG_SCHEDULE_PLOT < ( parameters ) > ;
%EVG_INDEX_PLOT < ( parameters ) > ;
%EVG_VARIANCE_PLOT < ( parameters ) > ;
%EVG_GANTT_CHART ( parameters ) ;
%EVG_WBS_CHART ( parameters ) ;
```

%EVG_COST_PLOT

This macro is used to produce a plot of earned value measures over time. The plots include Planned Value, Earned Value, Actual Cost, and revised cost.

```
%EVG_COST_PLOT < ( parameters ) > ;
```

Optional Parameters

ACRONYMS=long

specifies whether the long form of the earned value acronyms is to be used; e.g., BCWP versus EV. The short form is used unless the macro variable `_ACRONYMS_` is set to "long" or `ACRONYMS=long` is specified. The parameter overrides the

macro variable setting; i.e., specifying any non-null value other than “long” for the ACRONYMS= parameter produces short forms.

METRICS=SAS-data-set

identifies the periodic metrics data set produced by the %EVA_METRICS macro, the name of which is determined by the METRICS= parameter of %EVA_METRICS. The default data set name is METRICS.

PLOT=SAS-data-set

specifies the name of the output data set. This is an internal data set that is used as input to the plotting procedure. The default data set name is PLOT.

SUMMARY=SAS-data-set

identifies the summary data set from the %EVA_METRICS macro, the name of which is determined by the SUMMARY= parameter of %EVA_METRICS. The default data set name is SUMMARY.

Table 9.5 summarizes the parameters used for managing input and output data sets in the %EVG_COST_PLOT macro.

Table 9.5. %EVG_COST_PLOT I/O Parameter Summary

Type	Data Set
INPUT	METRICS
INPUT	SUMMARY
OUTPUT	PLOT

%EVG_SCHEDULE_PLOT

This macro is used to display planned and projected completion times for the project. Specifically, the status date is shown, along with the planned finish time, the revised finish time, and the projected finish time.

%EVG_SCHEDULE_PLOT < (*parameters*) > ;

Optional Parameters

ACRONYMS=long

specifies whether the long form of the earned value acronyms is to be used; e.g., BCWP versus EV. The short form is used unless the macro variable _ACRONYMS_ is set to “long” or ACRONYMS=long is specified. The parameter overrides the macro variable setting; i.e., specifying any non-null value other than “long” for the ACRONYMS= parameter produces short forms.

METRICS=SAS-data-set

identifies the periodic metrics data set produced by the %EVA_METRICS macro, the name of which is determined by the METRICS= parameter of %EVA_METRICS. The default data set name is METRICS.

PLOT=SAS-data-set

specifies the name of the output data set. This is an internal data set that is used as input to the plotting procedure. The default data set name is PLOT.

Table 9.6 summarizes the parameters used for managing input and output data sets in the %EVG_SCHEDULE_PLOT macro.

Table 9.6. %EVG_SCHEDULE_PLOT I/O Parameter Summary

Type	Data Set
INPUT	METRICS
OUTPUT	PLOT

%EVG_INDEX_PLOT

This macro is used to obtain a plot of the cost and schedule performance indices over time. If the project has not been completed, the To-Complete Performance Index (Budget at Completion version) is also displayed. The legend includes the Planned Value, Earned Value, and Actual Cost.

%EVG_INDEX_PLOT < (*parameters*) > ;

Optional Parameters

METRICS=SAS-data-set

identifies the periodic metrics data set produced by the %EVA_METRICS macro, the name of which is determined by the METRICS= parameter of %EVA_METRICS. The default data set name is METRICS.

PLOT=SAS-data-set

specifies the name of the output data set. This is an internal data set that is used as input to the plotting procedure. The default data set name is PLOT.

SUMMARY=SAS-data-set

identifies the summary data set from the %EVA_METRICS macro, the name of which is determined by the SUMMARY= parameter of %EVA_METRICS. The default data set name is SUMMARY.

Table 9.7 summarizes the parameters used for managing input and output data sets in the %EVG_INDEX_PLOT macro.

Table 9.7. %EVG_INDEX_PLOT I/O Parameter Summary

Type	Data Set
INPUT	METRICS
INPUT	SUMMARY
OUTPUT	PLOT

%EVG_VARIANCE_PLOT

This macro is used to generate a plot of the cost and schedule variance against time; it features threshold plots obtained from the Planned Value, plus or minus 10%. The vital statistics of Planned Value, Earned Value, and Actual Cost are listed in the legend.

%EVG_VARIANCE_PLOT < (*parameters*) > ;

Optional Parameters

METRICS=SAS-data-set

identifies the periodic metrics data set produced by the %EVA_METRICS macro, the name of which is determined by the METRICS= parameter of %EVA_METRICS. The default data set name is METRICS.

PLOT=SAS-data-set

specifies the name of the output data set. This is an internal data set that is used as input to the plotting procedure.

The default data set name is PLOT.

Table 9.8 summarizes the parameters used for managing input and output data sets in the %EVG_VARIANCE_PLOT macro.

Table 9.8. %EVG_VARIANCE_PLOT I/O Parameter Summary

Type	Data Set
INPUT	METRICS
OUTPUT	PLOT

%EVG_GANTT_CHART

This macro is used to produce a Gantt chart of the planned and revised schedule, along with selected earned value metrics for each task.

%EVG_GANTT_CHART (*parameters*) ;

Required Parameters

ACTIVITY=variable

specifies the activity variable in the PLANSCHED= and REVISESCHED= data sets.

FINISH=variable

specifies the finish date or datetime variable in the PLANSCHED= and REVISESCHED= data sets

PLANSCHED=SAS-data-set

identifies the data set containing the planned schedule.

REVISESCHED=SAS-data-set

identifies the data set that contains the updated schedule.

START=variable

specifies the start date or datetime variable in the PLANSCHED= and REVISESCHED= data sets.

Optional Parameters

CHART=SAS-data-set

specifies the name of the output data set. This is an internal data set that is used as input to the GANTT procedure. The default data set name is CHART.

DURATION=*variable*

specifies a duration variable in the PLANSCHED= or REVISESCHED= data set. The specified variable in the REVISESCHED= data set is used if the variable is present in both data sets. This variable is used only for differentiating milestones from single-day tasks.

HEIGHT=*h*

specifies a height factor for all text in PROC GANTT. (See the HEIGHT= option for the CHART statement of PROC GANTT (*SAS/OR User's Guide: Project Management*, Chapter 4) for more details.)

ID=*variable(s)*

specifies a space-delimited list of the variables from the TASKS= data set to be included in the chart. The choices are: WBS, PV, EV, AC, CV, CVP, SV, SVP, CPI, and SPI. The default value is "CV SV".

SCALE=*scale*

specifies the relative size adjustment of the data columns and chart. (See the SCALE= option for the CHART statement of PROC GANTT (*SAS/OR User's Guide: Project Management*, Chapter 4) for more details.)

TASKMETRICS=*SAS-data-set*

specifies the name of the output data set from the %EVA_TASK_METRICS macro. The default data set name is TASKMETS.

TIMENOW=*time*

specifies the date ('ddmmyy'd) or datetime ('ddmmyy:hh:mm:ss'dt) of the updated schedule and costs. The default value is today's date, unless the macro variable _TIMENOW_ has been set, in which case the default is the latter. A vertical line and label indicate the value.

Table 9.9 summarizes the parameters used for managing input and output data sets in the %EVG_GANTT_CHART macro.

Table 9.9. %EVG_GANTT_CHART I/O Parameter Summary

Type	Data Set	Variables
INPUT	PLANSCHED	ACTIVITY, DURATION, FINISH, START
INPUT	REVISESCHED	ACTIVITY, DURATION, FINISH, START
INPUT	TASKMETRICS	
OUTPUT	CHART	

%EVG_WBS_CHART

This macro is used to generate a Work Breakdown Structure chart. The parameters can be used to control the data that appears within the boxes of the display.

```
%EVG_WBS_CHART ( parameters );
```

Required Parameters

ACTIVITY=*variable*

specifies the activity variable in the STRUCTURE= data set.

PROJECT=*variable*

specifies the STRUCTURE= data set variable that identifies the project to which the current task belongs.

STRUCTURE=*SAS-data-set*

identifies the data set that defines the Work Breakdown Structure.

Optional Parameters

DEFID=*Y or otherwise*

specifies whether or not to include the default identification variables that are present in the STRUCTURE= data set in the boxes of the display. Default variable names are: E_START, E_FINISH, L_START, L_FINISH, S_START, S_FINISH, A_START, A_FINISH, T_FLOAT, and F_FLOAT. The default value for the DEFID= parameter is Y, meaning the default variables are displayed. (See the NODEFID option of the ACTNET statement of the NETDRAW procedure (*SAS/OR User's Guide: Project Management*, Chapter 5) for more details.)

ID=*variable list*

specifies the STRUCTURE= data set variables that appear in the boxes of the display.

REVERSEY=*Y or otherwise*

specifies whether or not to reverse the order in which the output pages appear. The default value is Y, which orders the pages from top to bottom. (See the REVERSEY option of the ACTNET statement of the NETDRAW procedure (*SAS/OR User's Guide: Project Management*, Chapter 5) for more details.)

ROTATE=*Y or otherwise*

specifies whether or not to rotate the display by 90 degrees. The default value is Y, which performs the rotation. (See the ROTATE option of the ACTNET statement of the NETDRAW procedure (*SAS/OR User's Guide: Project Management*, Chapter 5) for more details.)

ROTATETEXT=*Y or otherwise*

specifies whether or not to rotate the text that appears within the boxes of the display by 90 degrees. The default value is Y, which rotates the text. (See the ROTATETEXT option of the ACTNET statement of the NETDRAW procedure (*SAS/OR User's Guide: Project Management*, Chapter 5) for more details.)

VPAGES=*integer*

specifies the number of vertical pages to produce. The default value is 1. (See the VPAGES= parameter of the ACTNET statement of the NETDRAW procedure (*SAS/OR User's Guide: Project Management*, Chapter 5) for more details.)

[Table 9.10](#) summarizes the parameters used for managing input and output data sets in the %EVG_WBS_CHART macro.

Table 9.10. %EVG_WBS_CHART I/O Parameter Summary

Type	Data Set	Variables
INPUT	STRUCTURE	ACTIVITY, ID, PROJECT

Details

Variations

Table 9.11 shows the formulas for the Cost Variance, Schedule Variance, and Variance at Completion, along with the associated percentages.

Table 9.11. Variance Formulas

Acronym	Formula
CV	EV - AC
CV%	$\frac{CV}{EV}$
SV	EV - PV
SV%	$\frac{SV}{PV}$
VAC	BAC - EAC
VAC%	$\frac{VAC}{BAC}$

Performance Indices

Table 9.12 shows the formulas for Cost, Schedule, and To-Complete Performance Indices. WR is Work Remaining and is given by: $WR = BAC - EV$. The “Cost Estimates” section on page 842 gives different expressions for the EAC (Estimate at Completion).

Table 9.12. Performance Index Formulas

Acronym	Formula
CPI	$\frac{EV}{AC}$
SPI	$\frac{EV}{PV}$
$TCPI_{BAC}$	$\frac{WR}{BAC - AC}$
$TCPI_{EAC}$	$\frac{WR}{EAC - AC}$

Cost Estimates

The ETC, or Estimate to Complete, and the EAC, or Estimate at Completion, are two metrics that are central to Earned Value Analysis. The ETC is a projection of the additional funds needed to finish the project. The EAC can be derived as follows (where AC represents the actual costs to date):

$$EAC = AC + ETC.$$

For the purposes of this document, each of these two cost estimates takes four forms, illustrated by the following table for ETC:

Table 9.13. ETC Formulas

Acronym	Description	Formula
ETC _{rev}	Revised	EAC _{rev} - AC
ETC _{OTD}	Overrun-to-date	BAC - EV = WR
ETC _{CPI}	CPI	$\frac{WR}{CPI}$
ETC _{CPI×SPI}	CPI times SPI	$\frac{WR}{CPI \times SPI}$

The ETC_{rev} is derived directly from the revised schedule, revised costs, and actual costs to date. This form does not make allowances for past performance. It is assumed that this information has already been factored into the updated schedule and costs. Analogous to the ETC_{rev}, the ETC_{OTD} is taken to be the remaining planned value (Budget at Completion less Earned Value), also known as Work Remaining (WR). This form can be thought of as having a performance factor of 1.

The ETC_{CPI} form is the remaining planned value divided by the CPI. In this way favorable cost performance (CPI greater than 1) forces the estimate downward. The performance factor in this case is the inverse of the CPI. Similarly, the ETC_{CPI×SPI} form employs the inverse of the product of the CPI and SPI as the performance factor. In this case, both cost and schedule performance affect the estimate. For example, if both CPI and SPI are favorable (greater than 1), the estimate is lower.

Analysis

This section describes each macro in the earned value macro set in further detail.

%EVA_PLANNED_VALUE

This macro is used to establish periodic planned value. The first input data set for this macro (identified using the PLANSCHED= parameter) provides an initial baseline schedule. The second input data set (identified using the BUDGETCOST= parameter) contains the budgeted costs data set. One of the output data sets (identified using the PV= parameter) consists of two pertinent variables: `_TIME_` and `_PV_RATE_`. The latter variable lists the budgeted cost for the date or datetime indicated by the former variable. Another output data set is identified using the TASKPV= parameter, and provides the planned duration and costs by activity, for later use by the %EVA_EARNED_VALUE macro.

Upon completion, the status of the macro is saved in a global macro variable named `_EVA_PLANNED_VALUE_`, which can take one of the following three values:

- STATUS=SUCCESSFUL indicates successful completion of the macro.
- STATUS=SYNTAX_ERROR indicates that macro execution was halted due to an error in the macro invocation syntax.
- STATUS=RUNTIME_ERROR indicates that the macro invocation failed.

%EVA_EARNED_VALUE

This macro is used to establish periodic earned value and actual cost. The first of the input data sets for this macro (identified using the REVISESCHED= parameter)

contains a schedule that has been updated to reflect the current status of the project. A second input data set (identified using the ACTUALCOST= parameter) specifies the revised cost. The third input data set, from the %EVA_PLANNED_VALUE macro, is identified using the TASKPV= parameter, and supplies the planned duration and costs by activity. These are needed for computing the earned value. The output data set (identified using the EV= parameter) contains three relevant variables: _TIME_, _EV_RATE_, and _AC_RATE_. _EV_RATE_ lists the Earned Value, and _AC_RATE_ the Actual Cost of Work Performed, for the date or datetime indicated by the _TIME_ variable.

Upon completion, the status of the macro is saved in a global macro variable named _EVA_EARNED_VALUE_, which can take one of the following three values:

- STATUS=SUCCESSFUL indicates successful completion of the macro.
- STATUS=SYNTAX_ERROR indicates that macro execution was halted due to an error in the macro invocation syntax.
- STATUS=RUNTIME_ERROR indicates that the macro invocation failed.

%EVA_METRICS

This macro is used to compute the periodic metrics and summary statistics in reference to the date(s) or datetime(s) specified by the TIMENOW= parameter. The periodic planned value data set (generated by the %EVA_PLANNED_VALUE macro) and the periodic earned value data set (generated by the %EVA_EARNED_VALUE macro) are the inputs to the %EVA_METRICS macro. These two data sets are identified using the PV= and EV= parameters, respectively. The METRICS= parameter identifies the periodic output data set, and the SUMMARY= parameter identifies the summary output data set. An output listing is also produced, which is derived from the summary output data set. The two output data sets are described next.

Periodic Output Data Set

The variables in this data set are as follows:

- _TIME_ is the date or datetime reference point for the other variables.
- _PV_ is the cumulative Planned Value (Budgeted Cost of Work Scheduled).
- _EV_ is the cumulative Earned Value (Budgeted Cost of Work Performed).
- _AC_ is the cumulative Actual Cost (Actual Cost of Work Performed).
- _EACREV_ is the EAC_{rev} . This variable is simply an accumulation of costs to project completion, according to the revised budget and schedule.
- _SV_ is the cumulative Schedule Variance, calculated as $SV = EV - PV$.
- _CV_ is the cumulative Cost Variance, calculated as $CV = EV - AC$.
- _CPI_ is the Cost Performance Index, calculated as $CPI = \frac{EV}{AC}$.
- _SPI_ is the Schedule Performance Index, calculated as $SPI = \frac{EV}{PV}$.

Summary Output Data Set

The variables in this data set are as follows:

- `_NAME_` is the internal variable name.
- `_LABEL_` is the label used for the variable in the output listing.
- `_VALUEn_` gives the value of the variable for the reference date or datetime given by the respective `TIMENOW=` parameter value.

Each row of the data set corresponds to one of the summary statistics as follows:

- `_pctcomp_` is the percentage complete for the entire project, calculated as $Percentage\ Complete = \frac{EV}{BAC}$.
- `_ev_` is the cumulative Budgeted Cost of Work Performed (Earned Value).
- `_pv_` is the cumulative Budgeted Cost of Work Scheduled (Planned Value).
- `_ac_` is the cumulative Actual Cost of Work Performed (Actual Cost).
- `_cpi_` is the Cost Performance Index.
- `_spi_` is the Schedule Performance Index.
- `_cv_` is the Cost Variance, calculated as $CV = EV - AC$.
- `_cvp_` is the Cost Variance percentage, calculated as $CV\% = \frac{CV}{EV}$.
- `_sv_` is the Schedule Variance, calculated as $SV = EV - PV$.
- `_svp_` is the Schedule Variance percentage, calculated as $SV\% = \frac{SV}{PV}$.
- `_bac_` is the Budget at Completion (BAC).
- `_etc_` is the Estimate To Complete (ETC). The form of EAC used to compute the ETC is specified by the `EACFORM=` parameter of the `%EVA_METRICS` macro.
- `_eacrev_` is the revised Estimate at Completion (EAC_{rev}).
- `_eacotd_` is the Overrun to Date form of the EAC, calculated as $EAC_{OTD} = AC + WR$, where WR is the Work Remaining ($WR = BAC - EV$).
- `_eaccpi_` is the Cumulative CPI form of the EAC, calculated as $EAC_{CPI} = AC + \frac{WR}{CPI}$.
- `_eaccpispi_` is the Cumulative CPI times SPI form of the EAC, calculated as $EAC_{CPI \times SPI} = AC + \frac{WR}{CPI \times SPI}$.
- `_vac_` is the Variance at Completion, calculated as $VAC = BAC - EAC$. The form of EAC used is specified by the `EACFORM=` parameter of the `%EVA_METRICS` macro.
- `_vacp_` is the CPI Variance at Completion percentage, calculated as $VAC\% = \frac{VAC}{BAC}$. The form of EAC used to compute the VAC is specified by the `EACFORM=` parameter of the `%EVA_METRICS` macro.
- `_tcpi_` is the BAC To-Complete Performance Index, calculated as $TCPI = \frac{WR}{BAC - AC}$.

- `_etcpi_` is the EAC To-Complete Performance Index, calculated as $TCPI = \frac{WR}{EAC - AC}$. The form of EAC used is specified by the `EACFORM=` parameter of the `%EVA_METRICS` macro.

Upon completion, the status of the macro is saved in a global macro variable named `_EVA_METRICS_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

`%EVA_TASK_METRICS`

This macro uses the budgeted schedule and costs (identified using the `PLANSCHED=` and `BUDGETCOST=` parameters, respectively), along with the updated schedule and costs (identified using the `REVISESCHED=` and `ACTUALCOST=` parameters, respectively), to produce Cost Variance and Schedule Variance by task. The corresponding output data set is specified using the `TASKMETRICS=` parameter and is represented in the output listing. The variables in this data set are as follows:

- `Activity` is the reference task for the given row.
- `WBS_CODE` is the Work Breakdown Structure code for the given task.
- `_CV_` is the Cost Variance for the given task.
- `_CVP_` is the Cost Variance percentage for the given task.
- `_SV_` is the Schedule Variance for the given task.
- `_SVP_` is the Schedule Variance percentage for the given task.
- `_CPI_` is the Cost Performance Index for the given task.
- `_SPI_` is the Schedule Performance Index for the given task.
- `_PV_` is the Planned Value (BCWS) for the given task.
- `_EV_` is the Earned Value (BCWP) for the given task.
- `_AC_` is the Actual Cost (ACWP) for the given task.

Specifying “`AGGREGATE=Y`” with the `WBSCODE=` option forces the preceding metrics to be rolled up along the project hierarchy.

Upon completion, the status of the macro is saved in a global macro variable named `_EVA_TASK_METRICS_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

%EVG_COST_PLOT

This macro is used to generate a line plot of the Earned Value, Planned Value, Actual Cost, and revised cost over time. If the project has not been completed, three Estimates at Completion are also delineated by a three-tiered box at the right-hand side of the plot area. In addition, several vital statistics appear as part of the legend: Planned Value, Earned Value, Actual Cost, revised cost, Cost and Schedule Performance Indices, Budget At Completion, and Estimates at Completion.

Upon completion, the status of the macro is saved in a global macro variable named `_EVG_COST_PLOT_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

%EVG_SCHEDULE_PLOT

This macro is used to visualize planned and projected completion times for the project. To this end, plots of the planned value and actual and revised cost are displayed. To arrive at a projected finish time, the earned value plot is extended to the Budget at Completion with a slope equal to the ratio of Earned Value to time elapsed at the status date. The slope of this extension is the average rate at which Earned Value has accumulated up to the status date. Vital statistics displayed in the legend include Planned Value, Earned Value, Actual Cost, and Budget at Completion.

Upon completion, the status of the macro is saved in a global macro variable named `_EVG_SCHEDULE_PLOT_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

%EVG_INDEX_PLOT

This macro is used to plot the Cost and Schedule Performance Indices over time. The To-Complete Performance Index is also shown.

Upon completion, the status of the macro is saved in a global macro variable named `_EVG_INDEX_PLOT_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

%EVG_VARIANCE_PLOT

This macro is used to plot the Cost and Schedule Variances over time. Upon completion, the status of the macro is saved in a global macro variable named `_EVG_VARIANCE_PLOT_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

%EVG_GANTT_CHART

This macro is used to show the Cost and Schedule Variances and the Cost and Schedule Performance Indices by activity, along with a Gantt chart of the schedule. For each task, the bottom bar depicts the baseline schedule and the top bar represents the updated schedule.

Upon completion, the status of the macro is saved in a global macro variable named `_EVG_GANTT_CHART_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

%EVG_WBS_CHART

This macro is used to display the Work Breakdown Structure, in addition to any other data associated with an activity.

Upon completion, the status of the macro is saved in a global macro variable named `_EVG_WBS_CHART_`, which can take one of the following three values:

- `STATUS=SUCCESSFUL` indicates successful completion of the macro.
- `STATUS=SYNTAX_ERROR` indicates that macro execution was halted due to an error in the macro invocation syntax.
- `STATUS=RUNTIME_ERROR` indicates that the macro invocation failed.

Examples

In this section, a series of examples illustrates the usage and results of the earned value macro set.

Example 9.1. Integrated Assembly Project

The planned schedule for an assembly project is shown in [Output 9.1.1](#). This schedule can be computed by either of the CPM or PM procedures. (For more details, see *SAS/OR User's Guide: Project Management*, Chapter 2 or Chapter 6, respectively.)

Output 9.1.1. Schedule IOUT1

Integrated Assembly Test Project Initial Schedule					
Obs	Activity	Duration	Description	Planned Start	Planned Finish
1	S	0	Start	01OCT03	01OCT03
2	PD	105	Preliminary Design	01OCT03	13JAN04
3	PDR	21	Prelim Design Review	14JAN04	03FEB04
4	FD	168	Final Design	04FEB04	20JUL04
5	PM	126	Procure Material	09JUN04	12OCT04
6	FDR	21	Final Design Review	21JUL04	10AUG04
7	FP	273	Facility Preparation	01OCT04	30JUN05
8	FC	273	Fabricate Components	11AUG04	10MAY05
9	DA	26	Deliver Assembly	26JUN05	21JUL05
10	FRR	21	Facil Readiness Rvw	01JUL05	21JUL05
11	IA	42	Install Assembly	22JUL05	01SEP05
12	RR	21	Readiness Review	02SEP05	22SEP05
13	T	126	Test	01OCT05	03FEB06
14	TV	63	Test Validation	07JAN06	10MAR06

The budgeted cost rates are given in [Output 9.1.2](#). It is assumed that the activities incur costs continuously.

Output 9.1.2. Cost Rates IATCOST

Budgeted Costs		
Obs	Activity	Rate
1	S	0.0000
2	PD	4.7619
3	PDR	7.1429
4	FD	1.7857
5	PM	6.0317
6	FDR	7.1429
7	FP	4.0293
8	FC	5.1282
9	DA	13.0769
10	FRR	7.1429
11	IA	5.9524
12	RR	7.1429
13	T	7.1429
14	TV	7.9365

The budgeted periodic cost can now be generated with the following specification of the %EVA_PLANNED_VALUE macro:

```
%eva_planned_value (
  plansched=iout1,
  activity=activity,
  start=start,
  finish=finish,
  duration=duration,
  budgetcost=iatcost,
  rate=rate
);
```

For brevity, only the first 17 rows of the output data set are shown in [Output 9.1.3](#).

Output 9.1.3. %EVA_PLANNED_VALUE: Periodic Data Set

Daily Planned Value		
Obs	Period Identifier	PV Rate
1	01OCT03	4.76190
2	02OCT03	4.76190
3	03OCT03	4.76190
4	04OCT03	4.76190
5	05OCT03	4.76190
6	06OCT03	4.76190
7	07OCT03	4.76190
8	08OCT03	4.76190
9	09OCT03	4.76190
10	10OCT03	4.76190
11	11OCT03	4.76190
12	12OCT03	4.76190
13	13OCT03	4.76190
14	14OCT03	4.76190
15	15OCT03	4.76190
16	16OCT03	4.76190
17	17OCT03	4.76190

Next, the actual progress of the project through September 30, 2004, is entered. The ACTUAL data set is shown in [Output 9.1.4](#).

Output 9.1.4. Current Status ACTUAL

Status					
Obs	Activity	Actual Start	Actual Finish	Actual Rate	Pct. Comp.
1	S	01OCT03	01OCT03	0.0	100
2	PD	01OCT03	29JAN04	6.0	100
3	PDR	30JAN04	19FEB04	8.2	100
4	FD	20FEB04	10SEP04	3.1	100
5	PM	10AUG04	.	6.4	40
6	FDR	11SEP04	.	8.0	80

These inputs are then used by the CPM procedure with the original schedule to produce an updated schedule, given in [Output 9.1.5](#). (For information on using the CPM procedure, see *SAS/OR User's Guide: Project Management*, Chapter 2.)

Output 9.1.5. Updated Schedule UPDSCHED

Updated Schedule						
Obs	Activity	Actual Duration	Description	Pct. Comp.	Start	Finish
1	S	0	Start	100	01OCT03	01OCT03
2	PD	121	Preliminary Design	100	01OCT03	29JAN04
3	PDR	21	Prelim Design Review	100	30JAN04	19FEB04
4	FD	204	Final Design	100	20FEB04	10SEP04
5	PM	.	Procure Material	40	10AUG04	17DEC04
6	FDR	.	Final Design Review	80	11SEP04	05OCT04
7	FP	.	Facility Preparation	.	06OCT04	05JUL05
8	FC	.	Fabricate Components	.	12OCT04	11JUL05
9	DA	.	Deliver Assembly	.	07JUL05	01AUG05
10	FRR	.	Facil Readiness Rvw	.	06JUL05	26JUL05
11	IA	.	Install Assembly	.	02AUG05	12SEP05
12	RR	.	Readiness Review	.	13SEP05	03OCT05
13	T	.	Test	.	04OCT05	06FEB06
14	TV	.	Test Validation	.	10JAN06	13MAR06

The %EVA_EARNED_VALUE macro can then be used to generate the updated periodic cost, as follows:

```

%eva_earned_value(
    revisesched=updsched,
    activity=activity,
    start=start,
    finish=finish,
    actualcost=iatupd,
    rate=rate
);

```

Again, for brevity only the first 17 rows of the output data set are shown in [Output 9.1.6](#).

Output 9.1.6. %EVA_EARNED_VALUE: Periodic Data Set

Daily Earned Value and Revised Cost			
Obs	Period Identifier	EV Rate	AC Rate
1	01OCT03	4.13223	6
2	02OCT03	4.13223	6
3	03OCT03	4.13223	6
4	04OCT03	4.13223	6
5	05OCT03	4.13223	6
6	06OCT03	4.13223	6
7	07OCT03	4.13223	6
8	08OCT03	4.13223	6
9	09OCT03	4.13223	6
10	10OCT03	4.13223	6
11	11OCT03	4.13223	6
12	12OCT03	4.13223	6
13	13OCT03	4.13223	6
14	14OCT03	4.13223	6
15	15OCT03	4.13223	6
16	16OCT03	4.13223	6
17	17OCT03	4.13223	6

The %EVA_METRICS macro can be called with a current date of September 30, 2004, as follows:

```
%eva_metrics (
    timenow='30sep04'd,
    acronyms=long
);
```

[Output 9.1.7](#) shows the output listing from %EVA_METRICS. Notice that “ACRONYMS=long” is specified, which results in the long version of the earned value acronyms being used.

Output 9.1.7. %EVA_METRICS: Summary Statistics

Earned Value Analysis as of September 30, 2004	
Metric	Value
Percent Complete	20.66
BCWS (Budgeted Cost of Work Scheduled)	2049.16
BCWP (Budgeted Cost of Work Performed)	1374.00
ACWP (Actual Cost of Work Performed)	2023.40
CV (Cost Variance)	-649.40
CV%	-47.26
SV (Schedule Variance)	-675.16
SV%	-32.95
CPI (Cost Performance Index)	0.68
SPI (Schedule Performance Index)	0.67
BAC (Budget At Completion)	6650.00
EAC (Revised Estimate At Completion)	7352.60
EAC (Overrun to Date)	7299.40
EAC (Cumulative CPI)	9793.02
EAC (Cumulative CPI X SPI)	13610.86
ETC (Estimate To Complete)*	7769.62
VAC (Variance At Completion)*	-3143.02
VAC%*	-47.26
TCPI (BAC) (To-Complete Performance Index)	1.14
TCPI (EAC) (To-Complete Performance Index)*	0.68

* The CPI form of the EAC is used.

Next, the %EVA_TASK_METRICS macro is used to produce Cost and Schedule Variance by task.

```
%eva_task_metrics (
  plansched=iout1,
  revisesched=updsched,
  activity=activity,
  start=start,
  finish=finish,
  pctcomp=pctcomp,
  budgetcost=iatcost,
  actualcost=iatupd,
  rate=rate,
  timenow='30sep04'd,
  acronyms=long
);
```

The output listing is shown in [Output 9.1.8](#).

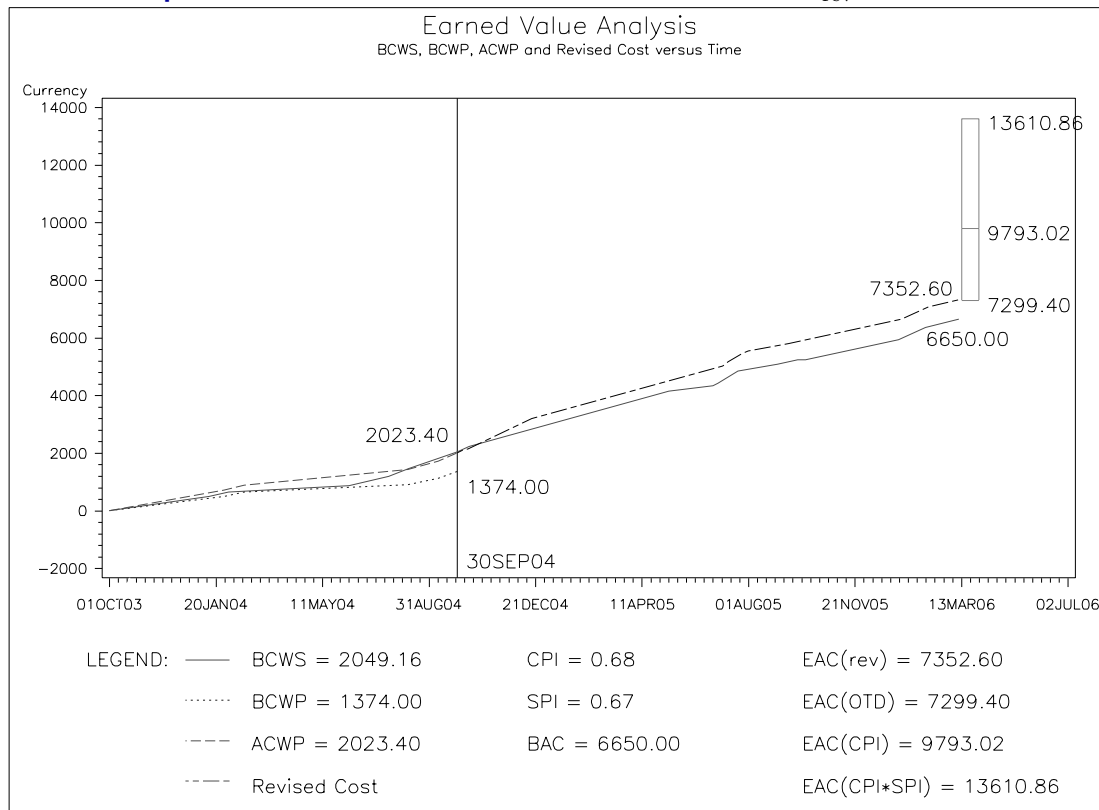
Output 9.1.8. %EVA_TASK_METRICS: CV and SV by Activity

Earned Value Analysis by Activity as of September 30, 2004						
Obs	Activity	BCWS	BCWP	ACWP	CV	CV%
1	S	0.00	0.00	0.00	0.00	0.00
2	PD	500.00	500.00	726.00	-226.00	-45.20
3	PDR	150.00	150.00	172.20	-22.20	-14.80
4	FD	300.00	300.00	632.40	-332.40	-110.80
5	PM	687.62	304.00	332.80	-28.80	-9.47
6	FDR	150.00	120.00	160.00	-40.00	-33.33
7	FP	0.00	0.00	0.00	0.00	0.00
8	FC	261.54	0.00	0.00	0.00	0.00
9	DA	0.00	0.00	0.00	0.00	0.00
10	FRR	0.00	0.00	0.00	0.00	0.00
11	IA	0.00	0.00	0.00	0.00	0.00
12	RR	0.00	0.00	0.00	0.00	0.00
13	T	0.00	0.00	0.00	0.00	0.00
14	TV	0.00	0.00	0.00	0.00	0.00

Obs	SV	SV%	CPI	SPI
1	0.00	0.00	.	.
2	0.00	0.00	0.69	1.00
3	0.00	0.00	0.87	1.00
4	0.00	0.00	0.47	1.00
5	-383.62	-55.79	0.91	0.44
6	-30.00	-20.00	0.75	0.80
7	0.00	0.00	.	.
8	-261.54	-100.00	.	0.00
9	0.00	0.00	.	.
10	0.00	0.00	.	.
11	0.00	0.00	.	.
12	0.00	0.00	.	.
13	0.00	0.00	.	.
14	0.00	0.00	.	.

Output 9.1.9 through Output 9.1.13 show charts that are produced using the earned value analysis reporting macros. First, the %EVA_COST_PLOT macro is used to generate the plot in Output 9.1.9.

```
%evg_cost_plot (acronyms=long) ;
```

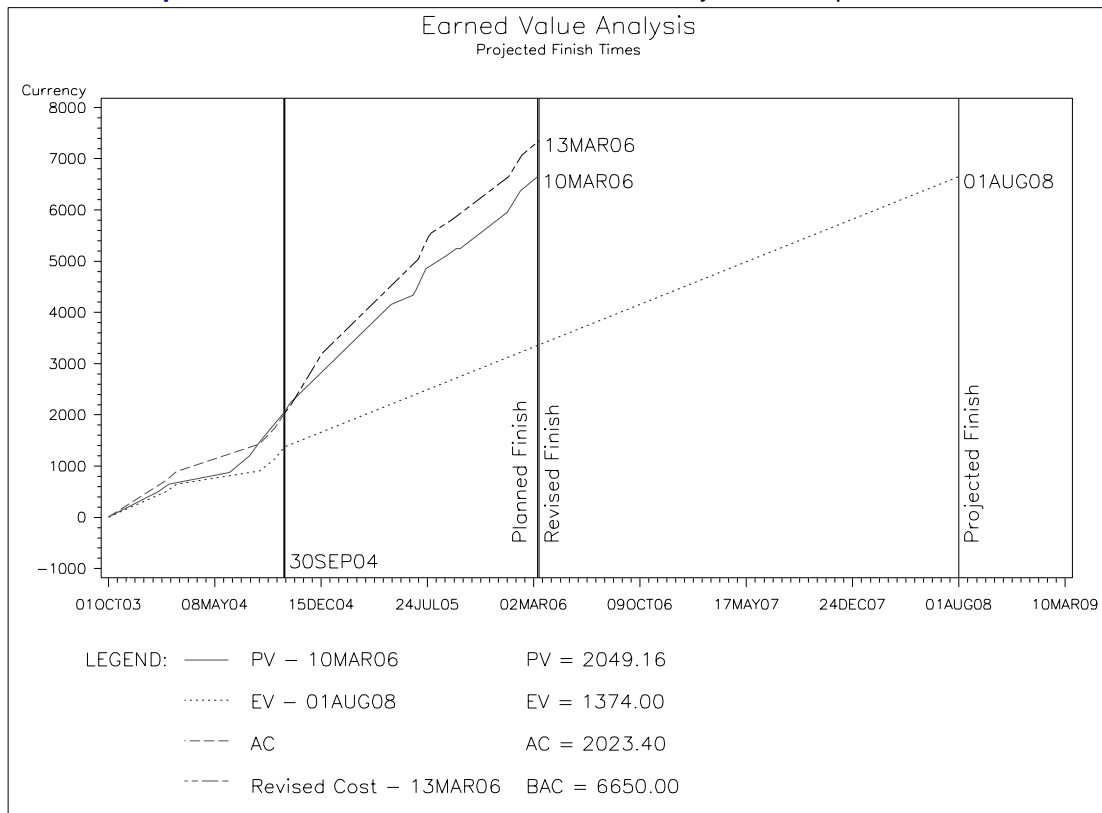
Output 9.1.9. %EVG_COST_PLOT, EV, PV, AC, and EAC_{rev}

According to the plan, the earned value percentage complete at the status date of September 30, 2004 (shown by the BCWS plot) should have been 2049/6650, or 30.81%. Instead, the percentage complete (shown by the BCWP plot) is only 1374/6650, or 20.66%.

Next, the %EVG_SCHEDULE_PLOT macro is used to produce the plot in [Output 9.1.10](#). The resulting output shows a disastrous projected completion date of August 1, 2008, based upon the current earned value. This is two years and four months behind the planned schedule end date of March 10, 2006. Based on the performance of the project so far, it is estimated to cost \$9793 at completion (EAC_{CPI}), amounting to nearly a 50% overrun.

```
%evg_schedule_plot;
```

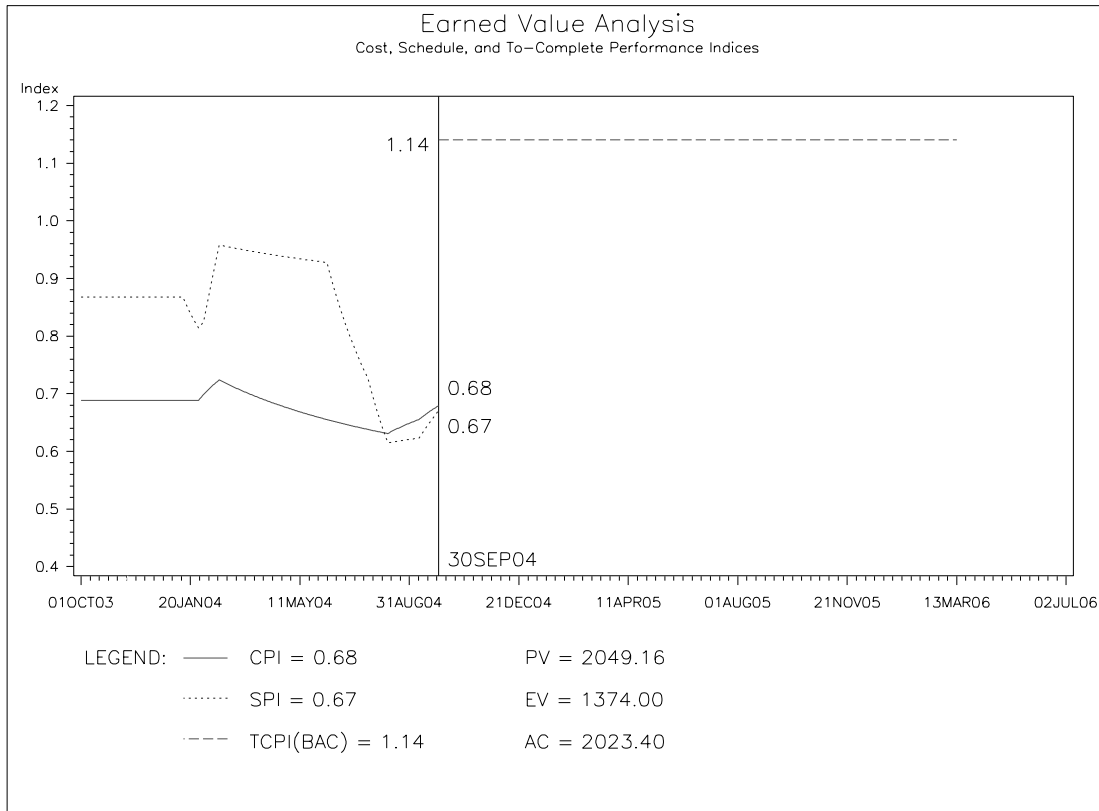
Output 9.1.10. %EVG_SCHEDULE_PLOT: Projected Completion Date



The %EVG_INDEX_PLOT macro is then used to produce the plot in [Output 9.1.11](#).

```
%evg_index_plot;
```

Output 9.1.11. %EVG_INDEX_PLOT: Cost and Schedule Performance Index

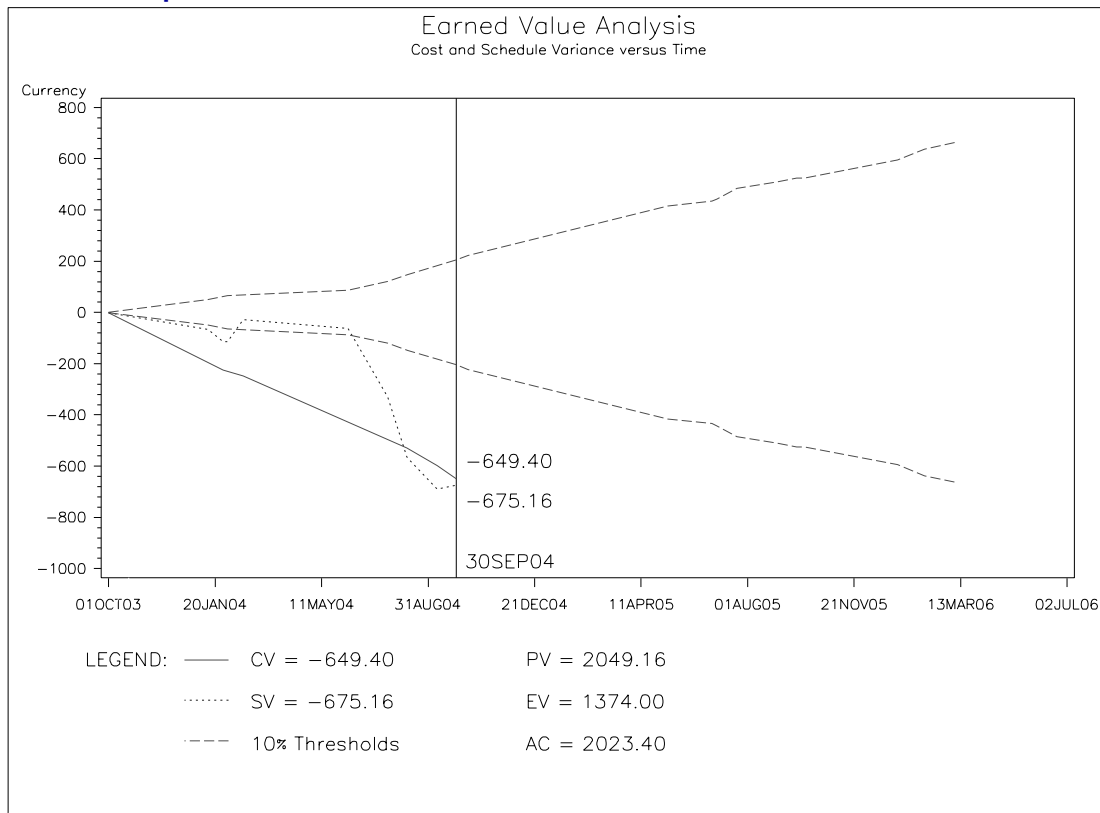


The plot in [Output 9.1.11](#) shows that the performance factor must be increased from 0.68 to 1.14 in order to stay within the budget.

The %EVG_VARIANCE_PLOT macro is used to produce the plot in [Output 9.1.12](#).

```
%evg_variance_plot;
```


Output 9.1.12. %EVG_VARIANCE_PLOT: Cost and Schedule Variance

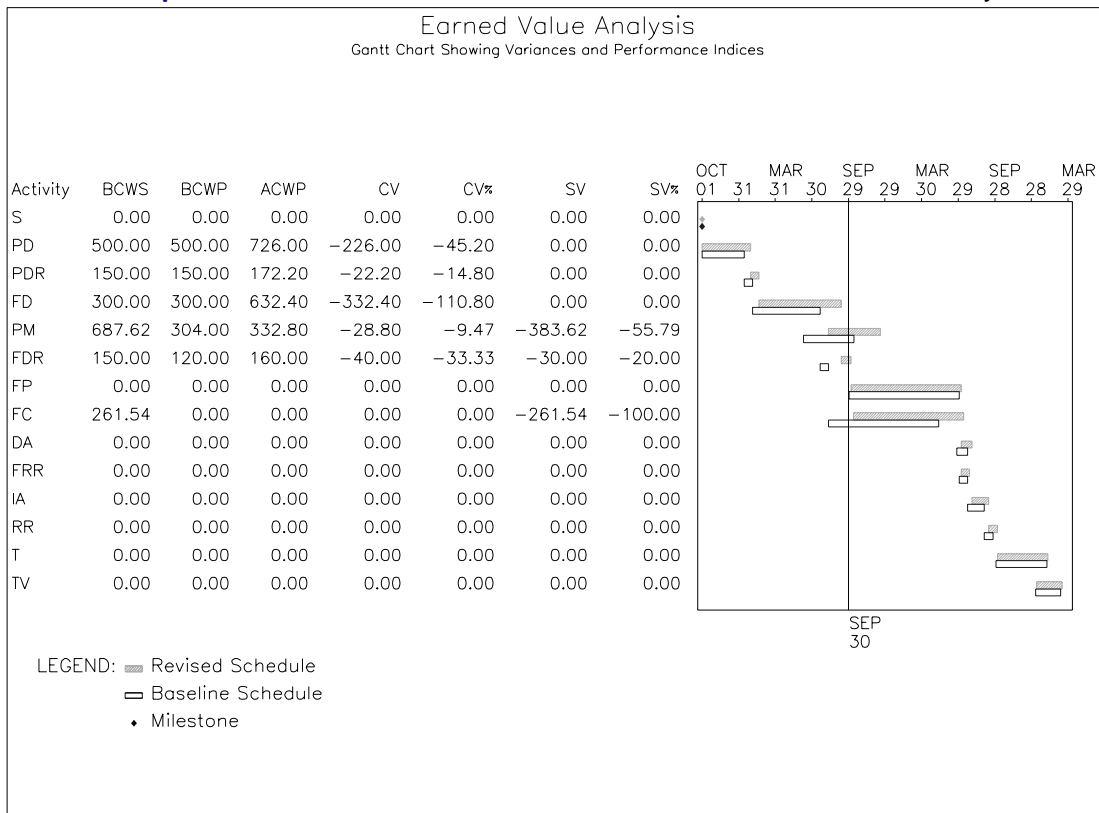


The plot in [Output 9.1.12](#) shows that both the cost and schedule variance have strayed outside of the area between the 10% threshold plots of the planned value.

Finally, the %EVG_GANTT_CHART macro is used to produce the Gantt chart shown in [Output 9.1.13](#).

```
%evg_gantt_chart (
    plansched=iout1,
    revisesched=updsched,
    activity=activity,
    start=start,
    finish=finish,
    duration=duration,
    timenow='30sep04'd,
    id=pv ev ac cv cvp sv svp,
    height=3,
    scale=0.5
);
```

Output 9.1.13. %EVG_GANTT_CHART: Cost and Schedule Variance by Task



Example 9.2. Construction Project

This example illustrates a home building multiproject. The cost structure of the multiproject consists of both rates and fixed costs. This example also demonstrates how to accommodate multiple status dates. The initial schedule is shown in [Output 9.2.1](#).

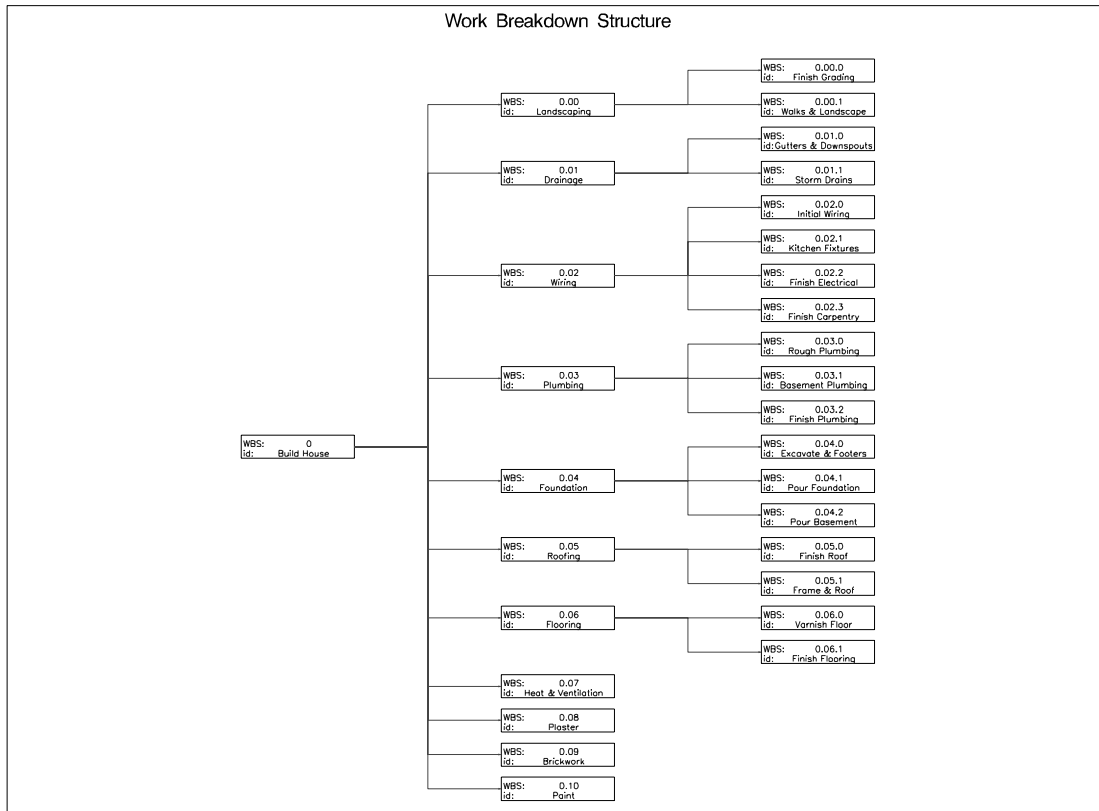
Output 9.2.1. Initial Schedule GBSCHED

Planned Construction Schedule					
Obs	Activity	WBS Code	Duration	Scheduled Start	Scheduled Finish
1	Build House	0	1	04SEP04	12OCT04
2	Landscaping	0.00	1	29SEP04	10OCT04
3	Finish Grading	0.00.0	2	29SEP04	30SEP04
4	Walks & Landscape	0.00.1	5	06OCT04	10OCT04
5	Drainage	0.01	1	28SEP04	29SEP04
6	Gutters & Downspouts	0.01.0	1	28SEP04	28SEP04
7	Storm Drains	0.01.1	1	29SEP04	29SEP04
8	Wiring	0.02	1	14SEP04	05OCT04
9	Initial Wiring	0.02.0	2	14SEP04	15SEP04
10	Kitchen Fixtures	0.02.1	1	03OCT04	03OCT04
11	Finish Electrical	0.02.2	1	04OCT04	04OCT04
12	Finish Carpentry	0.02.3	3	03OCT04	05OCT04
13	Plumbing	0.03	1	10SEP04	04OCT04
14	Rough Plumbing	0.03.0	3	11SEP04	13SEP04
15	Basement Plumbing	0.03.1	1	10SEP04	10SEP04
16	Finish Plumbing	0.03.2	2	03OCT04	04OCT04
17	Foundation	0.04	1	04SEP04	15SEP04
18	Excavate & Footers	0.04.0	4	04SEP04	07SEP04
19	Pour Foundation	0.04.1	2	08SEP04	09SEP04
20	Pour Basement	0.04.2	2	14SEP04	15SEP04
21	Roofing	0.05	1	10SEP04	27SEP04
22	Finish Roof	0.05.0	2	26SEP04	27SEP04
23	Frame & Roof	0.05.1	4	10SEP04	13SEP04
24	Flooring	0.06	1	30SEP04	12OCT04
25	Varnish Floor	0.06.0	2	11OCT04	12OCT04
26	Finish Flooring	0.06.1	3	30SEP04	02OCT04
27	Heat & Ventilation	0.07	4	16SEP04	19SEP04
28	Plaster	0.08	10	20SEP04	29SEP04
29	Brickwork	0.09	6	20SEP04	25SEP04
30	Paint	0.10	3	06OCT04	08OCT04

The Work Breakdown Structure for the project is given in [Output 9.2.2](#); this chart was created using the %EVG_WBS_CHART macro.

```
%evg_wbs_chart (
  structure=gbsched,
  activity=activity,
  project=project,
  id=wbs_code id,
  rotate=N,
  rotatetext=N,
  defid=N
);
```

Output 9.2.2. %EVG_WBS_CHART: Work Breakdown Structure



Output 9.2.3 lists the budgeted costs for each task.

Output 9.2.3. Budgeted Cost Rates GBASE

Planned Construction Costs				
Obs	Activity	Cost	Start Pct./Weights	Rate
1	Build House	0	0	0
2	Landscaping	0	0	0
3	Drainage	0	0	0
4	Wiring	0	0	0
5	Plumbing	0	0	0
6	Foundation	0	0	0
7	Roofing	0	0	0
8	Flooring	0	0	0
9	Heat & Ventilation	325	50	40
10	Plaster	14500	1,2,3,4	20
11	Brickwork	9500	1,2,3	45
12	Paint	3250	50	30
13	Finish Grading	425	25	25
14	Walks & Landscape	2475	25	25
15	Gutters & Downspouts	1200	50	15
16	Storm Drains	150	25	15
17	Initial Wiring	575	25	45
18	Kitchen Fixtures	375	25	25
19	Finish Electrical	550	25	50
20	Finish Carpentry	1450	25	20
21	Rough Plumbing	1025	25	30
22	Basement Plumbing	1000	25	50
23	Finish Plumbing	350	25	20
24	Excavate & Footers	5250	50	20
25	Pour Foundation	1500	25	15
26	Pour Basement	950	50	20
27	Finish Roof	725	50	40
28	Frame & Roof	9500	25	35
29	Varnish Floor	750	25	15
30	Finish Flooring	425	50	25

Note that the “Storm Drains” task, in the sixteenth observation, costs one quarter (25%) of \$150 upon initiation and continues at a rate of \$15/day. When complete, the balance (75%) of the \$150 is charged. Weighted milestones are specified for the “Plaster” activity, given in Observation 10. At the start, one tenth $\left(\frac{1}{1+2+3+4}\right)$ of \$14,500, or \$1,450, is incurred. The rate is \$20/day. When the task is one third complete, another fifth $\left(\frac{2}{1+2+3+4}\right)$ of \$14,500, or \$2,900, is incurred. At completion, the cost is two fifths $\left(\frac{4}{1+2+3+4}\right)$ of \$14,500, or \$5,800.

The %EVA_PLANNED_VALUE macro is next invoked to compute the periodic planned value.

```
%eva_planned_value(  
    plansched=gbsched,  
    activity=activity,  
    start=start,  
    finish=finish,  
    budgetcost=gbase,  
    rate=rate,  
    cost=cost,  
    spct=spct,  
    taskpv=bout,  
    pv=gbcost  
);
```

The periodic planned value data set is shown in [Output 9.2.4](#).

Output 9.2.4. %EVA_PLANNED_VALUE: Periodic Data Set

Daily Planned Value		
Obs	Period Identifier	PV Rate
1	04SEP04	2645.00
2	05SEP04	20.00
3	06SEP04	20.00
4	07SEP04	2645.00
5	08SEP04	390.00
6	09SEP04	1140.00
7	10SEP04	3460.00
8	11SEP04	321.25
9	12SEP04	65.00
10	13SEP04	7958.75
11	14SEP04	683.75
12	15SEP04	971.25
13	16SEP04	202.50
14	17SEP04	40.00
15	18SEP04	40.00
16	19SEP04	202.50
17	20SEP04	3098.33
18	21SEP04	65.00
19	22SEP04	3231.67
20	23SEP04	2965.00
21	24SEP04	65.00
22	25SEP04	4815.00
23	26SEP04	4772.50
24	27SEP04	422.50
25	28SEP04	1235.00
26	29SEP04	6116.25
27	30SEP04	581.25
28	01OCT04	25.00
29	02OCT04	237.50
30	03OCT04	890.00
31	04OCT04	902.50
32	05OCT04	1107.50
33	06OCT04	2298.75
34	07OCT04	55.00
35	08OCT04	1680.00
36	09OCT04	25.00
37	10OCT04	1881.25
38	11OCT04	202.50
39	12OCT04	577.50

Notice that the TASKPV= parameter has been used to ultimately pass the planned activity duration and costs to %EVA_EARNED_VALUE. Assume that the schedule has been updated to reflect actual start and finish times, as of the status date September 15, 2004. The updated schedule is shown in [Output 9.2.5](#).

Output 9.2.5. Updated Schedule GASCHED

Updated Construction Schedule					
Obs	Activity	WBS Code	Duration	Scheduled Start	Scheduled Finish
1	Build House	0	1	04SEP04	17OCT04
2	Landscaping	0.00	1	04OCT04	15OCT04
3	Drainage	0.01	1	03OCT04	04OCT04
4	Wiring	0.02	1	19SEP04	10OCT04
5	Plumbing	0.03	1	15SEP04	09OCT04
6	Foundation	0.04	1	04SEP04	20SEP04
7	Roofing	0.05	1	15SEP04	02OCT04
8	Flooring	0.06	1	05OCT04	17OCT04
9	Heat & Ventilation	0.07	4	21SEP04	24SEP04
10	Plaster	0.08	10	25SEP04	04OCT04
11	Brickwork	0.09	6	25SEP04	30SEP04
12	Paint	0.10	3	11OCT04	13OCT04
13	Finish Grading	0.00.0	2	04OCT04	05OCT04
14	Walks & Landscape	0.00.1	5	11OCT04	15OCT04
15	Gutters & Downspouts	0.01.0	1	03OCT04	03OCT04
16	Storm Drains	0.01.1	1	04OCT04	04OCT04
17	Initial Wiring	0.02.0	2	19SEP04	20SEP04
18	Kitchen Fixtures	0.02.1	1	08OCT04	08OCT04
19	Finish Electrical	0.02.2	1	09OCT04	09OCT04
20	Finish Carpentry	0.02.3	3	08OCT04	10OCT04
21	Rough Plumbing	0.03.0	3	16SEP04	18SEP04
22	Basement Plumbing	0.03.1	1	15SEP04	15SEP04
23	Finish Plumbing	0.03.2	2	08OCT04	09OCT04
24	Excavate & Footers	0.04.0	4	04SEP04	11SEP04
25	Pour Foundation	0.04.1	2	12SEP04	14SEP04
26	Pour Basement	0.04.2	2	19SEP04	20SEP04
27	Finish Roof	0.05.0	2	01OCT04	02OCT04
28	Frame & Roof	0.05.1	4	15SEP04	18SEP04
29	Varnish Floor	0.06.0	2	16OCT04	17OCT04
30	Finish Flooring	0.06.1	3	05OCT04	07OCT04

The updated cost rates are given in [Output 9.2.6](#).

Output 9.2.6. Updated Cost Rates GACT

Updated Construction Costs					
Obs	Activity	Rate	Cost	Start	Pct./Weights
1	Build House	0	0	0	
2	Landscaping	0	0	0	
3	Drainage	0	0	0	
4	Wiring	0	0	0	
5	Plumbing	0	0	0	
6	Foundation	0	0	0	
7	Roofing	0	0	0	
8	Flooring	0	0	0	
9	Heat & Ventilation	40	325	50	
10	Plaster	20	14500	1,2,3,4	
11	Brickwork	45	9500	1,2,3	
12	Paint	30	3250	50	
13	Finish Grading	25	425	25	
14	Walks & Landscape	25	2475	25	
15	Gutters & Downspouts	15	1200	50	
16	Storm Drains	15	150	25	
17	Initial Wiring	45	575	25	
18	Kitchen Fixtures	25	375	25	
19	Finish Electrical	50	550	25	
20	Finish Carpentry	20	1450	25	
21	Rough Plumbing	30	1025	25	
22	Basement Plumbing	50	1000	25	
23	Finish Plumbing	20	350	25	
24	Excavate & Footers	30	6350	50	
25	Pour Foundation	30	2700	25	
26	Pour Basement	20	950	50	
27	Finish Roof	40	725	50	
28	Frame & Roof	35	9500	25	
29	Varnish Floor	15	750	25	
30	Finish Flooring	25	425	50	

The %EVA_EARNED_VALUE macro can then be called as follows:

```

%eva_earned_value (
    revisesched=gasched,
    activity=activity,
    start=start,
    finish=finish,
    actualcost=gact,
    rate=rate,
    cost=cost,
    spct=spct,
    taskpv=bout,
    ev=gacost
);

```

The periodic earned value data set that is generated by %EVA_EARNED_VALUE is shown in [Output 9.2.7](#).

Output 9.2.7. %EVA_EARNED_VALUE: Periodic Data Set

Daily Earned Value and Revised Cost			
Obs	Period Identifier	EV Rate	AC Rate
1	04SEP04	2635.00	3205.00
2	05SEP04	10.00	30.00
3	06SEP04	10.00	30.00
4	07SEP04	10.00	30.00
5	08SEP04	10.00	30.00
6	09SEP04	10.00	30.00
7	10SEP04	10.00	30.00
8	11SEP04	2635.00	3205.00
9	12SEP04	385.00	705.00
10	13SEP04	10.00	30.00
11	14SEP04	1135.00	2055.00
12	15SEP04	3460.00	3460.00
13	16SEP04	321.25	321.25
14	17SEP04	65.00	65.00
15	18SEP04	7958.75	7958.75
16	19SEP04	683.75	683.75
17	20SEP04	971.25	971.25
18	21SEP04	202.50	202.50
19	22SEP04	40.00	40.00
20	23SEP04	40.00	40.00
21	24SEP04	202.50	202.50
22	25SEP04	3098.33	3098.33
23	26SEP04	65.00	65.00
24	27SEP04	3231.67	3231.67
25	28SEP04	2965.00	2965.00
26	29SEP04	65.00	65.00
27	30SEP04	4815.00	4815.00
28	01OCT04	4772.50	4772.50
29	02OCT04	422.50	422.50
30	03OCT04	1235.00	1235.00
31	04OCT04	6116.25	6116.25
32	05OCT04	581.25	581.25
33	06OCT04	25.00	25.00
34	07OCT04	237.50	237.50
35	08OCT04	890.00	890.00
36	09OCT04	902.50	902.50
37	10OCT04	1107.50	1107.50
38	11OCT04	2298.75	2298.75
39	12OCT04	55.00	55.00
40	13OCT04	1680.00	1680.00
41	14OCT04	25.00	25.00
42	15OCT04	1881.25	1881.25
43	16OCT04	202.50	202.50
44	17OCT04	577.50	577.50

The BUDGETCOST= parameter has been employed to capture the planned duration and costs for each activity. Next, the %EVA_METRICS macro is used to produce statistics for the entire project. For illustrative purposes, a range of times from the start of the project to the revised projected end date is used. Typically, only actual status dates would be used; in this case, perhaps September 4, 2004 and September 15, 2004. Unless otherwise noted, the latter is the assumption for the remainder of the macros in this example.

```
%eva_metrics (
    pv=gbcost,
    ev=gacost,
    timenow=' 04SEP04' d ' 15SEP04' d ' 01OCT04' d ' 17OCT04' d
);
```

The output listing is given in [Output 9.2.8](#).

Output 9.2.8. %EVA_METRICS: Summary Statistics

Earned Value Analysis		
Metric	September 4, 2004	September 15, 2004
Percent Complete	4.54	17.78
PV (Planned Value)	2645.00	20320.00
EV (Earned Value)	2635.00	10320.00
AC (Actual Cost)	3205.00	12840.00
CV (Cost Variance)	-570.00	-2520.00
CV%	-21.63	-24.42
SV (Schedule Variance)	-10.00	-10000.00
SV%	-0.38	-49.21
CPI (Cost Performance Index)	0.82	0.80
SPI (Schedule Performance Index)	1.00	0.51
BAC (Budget At Completion)	58055.00	58055.00
EAC (Revised Estimate At Completion)	60575.00	60575.00
EAC (Overrun to Date)	58625.00	60575.00
EAC (Cumulative CPI)	70613.39	72231.22
EAC (Cumulative CPI X SPI)	70869.21	129780.85
ETC (Estimate To Complete)*	67408.39	59391.22
VAC (Variance At Completion)*	-12558.39	-14176.22
VAC%*	-21.63	-24.42
TCPI (BAC) (To-Complete Performance Index)	1.01	1.06
TCPI (EAC) (To-Complete Performance Index)*	0.82	0.80
Metric	October 1, 2004	October 17, 2004
Percent Complete	68.59	100.00
PV (Planned Value)	48197.50	58055.00
EV (Earned Value)	39817.50	58055.00
AC (Actual Cost)	42337.50	60575.00
CV (Cost Variance)	-2520.00	-2520.00
CV%	-6.33	-4.34
SV (Schedule Variance)	-8380.00	0.00
SV%	-17.39	0.00
CPI (Cost Performance Index)	0.94	0.96
SPI (Schedule Performance Index)	0.83	1.00
BAC (Budget At Completion)	58055.00	58055.00
EAC (Revised Estimate At Completion)	60575.00	60575.00
EAC (Overrun to Date)	60575.00	60575.00
EAC (Cumulative CPI)	61729.23	60575.00
EAC (Cumulative CPI X SPI)	65810.42	60575.00
ETC (Estimate To Complete)*	19391.73	0.00
VAC (Variance At Completion)*	-3674.23	-2520.00
VAC%*	-6.33	-4.34
TCPI (BAC) (To-Complete Performance Index)	1.16	0.00
TCPI (EAC) (To-Complete Performance Index)*	0.94	0.94

* The CPI form of the EAC is used.

Observe that the Estimate To Complete (ETC) and Schedule Performance Index (SPI) converge to 0 and 1, respectively, over time. Also, the Actual Cost (AC) agrees with the various Estimates At Completion (EAC's) at the projected completion date.

Next, the %EVA_TASK_METRICS macro is used to show an activity-level view of the progress of the project.

```
%eva_task_metrics (  
    activity=id,  
    plansched=gbsched,  
    revisesched=gasched,  
    start=start,  
    finish=finish,  
    budgetcost=gbase,  
    actualcost=gact,  
    cost=cost,  
    spct=spct,  
    rate=rate,  
    timenow='15SEP04' d,  
    aggregate=Y  
);
```

The AGGREGATE= parameter is specified in order to roll up the values with respect to the project hierarchy. The output from this macro is shown in [Output 9.2.9](#) and [Output 9.2.10](#).

Output 9.2.9. %EVA_TASK_METRICS: Metrics by Activity

Earned Value Analysis by Activity as of September 15, 2004					
Obs	Activity	WBS Code	PV	EV	AC
1	Build House	0	20320.00	10320.00	12840.00
2	Landscaping	0.00	0.00	0.00	0.00
3	Drainage	0.01	0.00	0.00	0.00
4	Wiring	0.02	665.00	0.00	0.00
5	Plumbing	0.03	2165.00	1050.00	1050.00
6	Foundation	0.04	7850.00	6860.00	9380.00
7	Roofing	0.05	9640.00	2410.00	2410.00
8	Flooring	0.06	0.00	0.00	0.00
9	Heat & Ventilation	0.07	0.00	0.00	0.00
10	Plaster	0.08	0.00	0.00	0.00
11	Brickwork	0.09	0.00	0.00	0.00
12	Paint	0.10	0.00	0.00	0.00
13	Finish Grading	0.00.0	0.00	0.00	0.00
14	Walks & Landscape	0.00.1	0.00	0.00	0.00
15	Gutters & Downspouts	0.01.0	0.00	0.00	0.00
16	Storm Drains	0.01.1	0.00	0.00	0.00
17	Initial Wiring	0.02.0	665.00	0.00	0.00
18	Kitchen Fixtures	0.02.1	0.00	0.00	0.00
19	Finish Electrical	0.02.2	0.00	0.00	0.00
20	Finish Carpentry	0.02.3	0.00	0.00	0.00
21	Rough Plumbing	0.03.0	1115.00	0.00	0.00
22	Basement Plumbing	0.03.1	1050.00	1050.00	1050.00
23	Finish Plumbing	0.03.2	0.00	0.00	0.00
24	Excavate & Footers	0.04.0	5330.00	5330.00	6590.00
25	Pour Foundation	0.04.1	1530.00	1530.00	2790.00
26	Pour Basement	0.04.2	990.00	0.00	0.00
27	Finish Roof	0.05.0	0.00	0.00	0.00
28	Frame & Roof	0.05.1	9640.00	2410.00	2410.00
29	Varnish Floor	0.06.0	0.00	0.00	0.00
30	Finish Flooring	0.06.1	0.00	0.00	0.00

Output 9.2.10. %EVA_TASK_METRICS: Metrics by Activity (Continued)

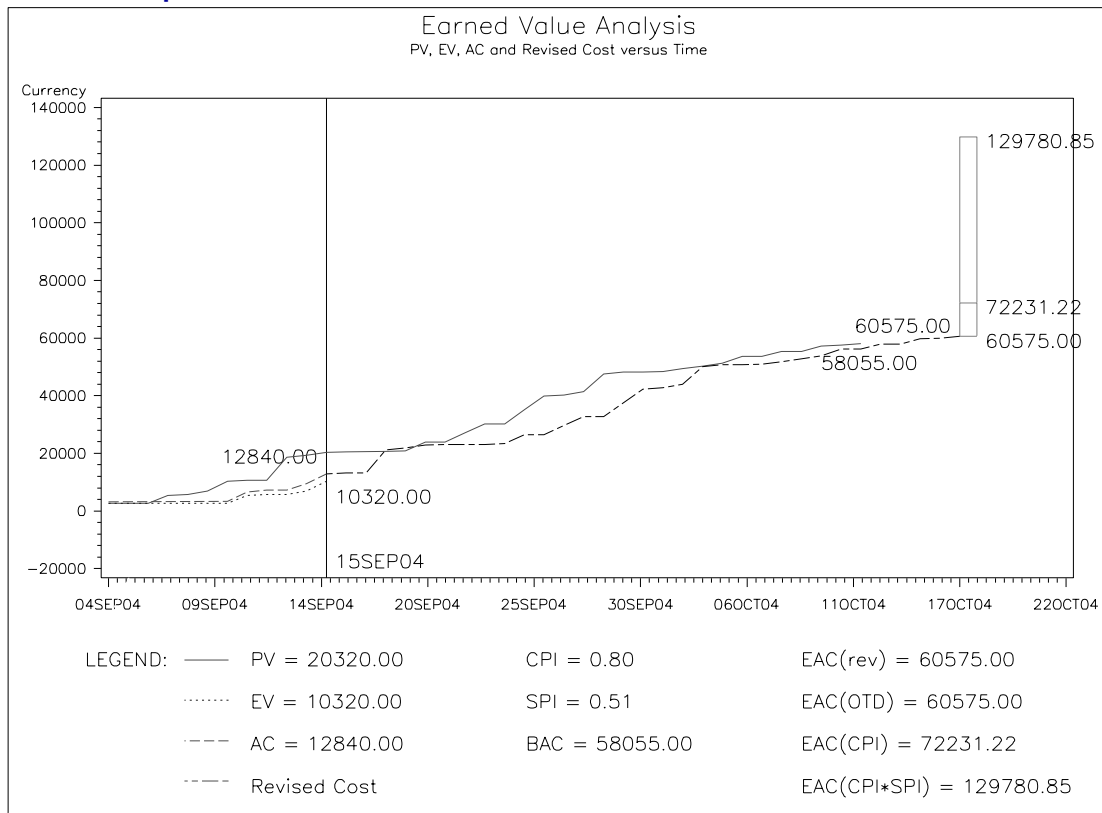
Obs	CV	CV%	SV	SV%	CPI	SPI
1	-2520.00	-24.42	-10000.00	-49.21	0.80	0.51
2	0.00	0.00	0.00	0.00	.	.
3	0.00	0.00	0.00	0.00	.	.
4	0.00	0.00	-665.00	-100.00	.	0.00
5	0.00	0.00	-1115.00	-51.50	1.00	0.48
6	-2520.00	-36.73	-990.00	-12.61	0.73	0.87
7	0.00	0.00	-7230.00	-75.00	1.00	0.25
8	0.00	0.00	0.00	0.00	.	.
9	0.00	0.00	0.00	0.00	.	.
10	0.00	0.00	0.00	0.00	.	.
11	0.00	0.00	0.00	0.00	.	.
12	0.00	0.00	0.00	0.00	.	.
13	0.00	0.00	0.00	0.00	.	.
14	0.00	0.00	0.00	0.00	.	.
15	0.00	0.00	0.00	0.00	.	.
16	0.00	0.00	0.00	0.00	.	.
17	0.00	0.00	-665.00	-100.00	.	0.00
18	0.00	0.00	0.00	0.00	.	.
19	0.00	0.00	0.00	0.00	.	.
20	0.00	0.00	0.00	0.00	.	.
21	0.00	0.00	-1115.00	-100.00	.	0.00
22	0.00	0.00	0.00	0.00	1.00	1.00
23	0.00	0.00	0.00	0.00	.	.
24	-1260.00	-23.64	0.00	0.00	0.81	1.00
25	-1260.00	-82.35	0.00	0.00	0.55	1.00
26	0.00	0.00	-990.00	-100.00	.	0.00
27	0.00	0.00	0.00	0.00	.	.
28	0.00	0.00	-7230.00	-75.00	1.00	0.25
29	0.00	0.00	0.00	0.00	.	.
30	0.00	0.00	0.00	0.00	.	.

Next, the %EVG_COST_PLOT macro is called to show the Planned Value (PV), Earned Value (EV), Actual Cost (AC), and revised cost plots.

```
%evg_cost_plot;
```

The plot is shown in [Output 9.2.11](#).

Output 9.2.11. %EVG_COST_PLOT, PV, EV, AC and Revised Cost

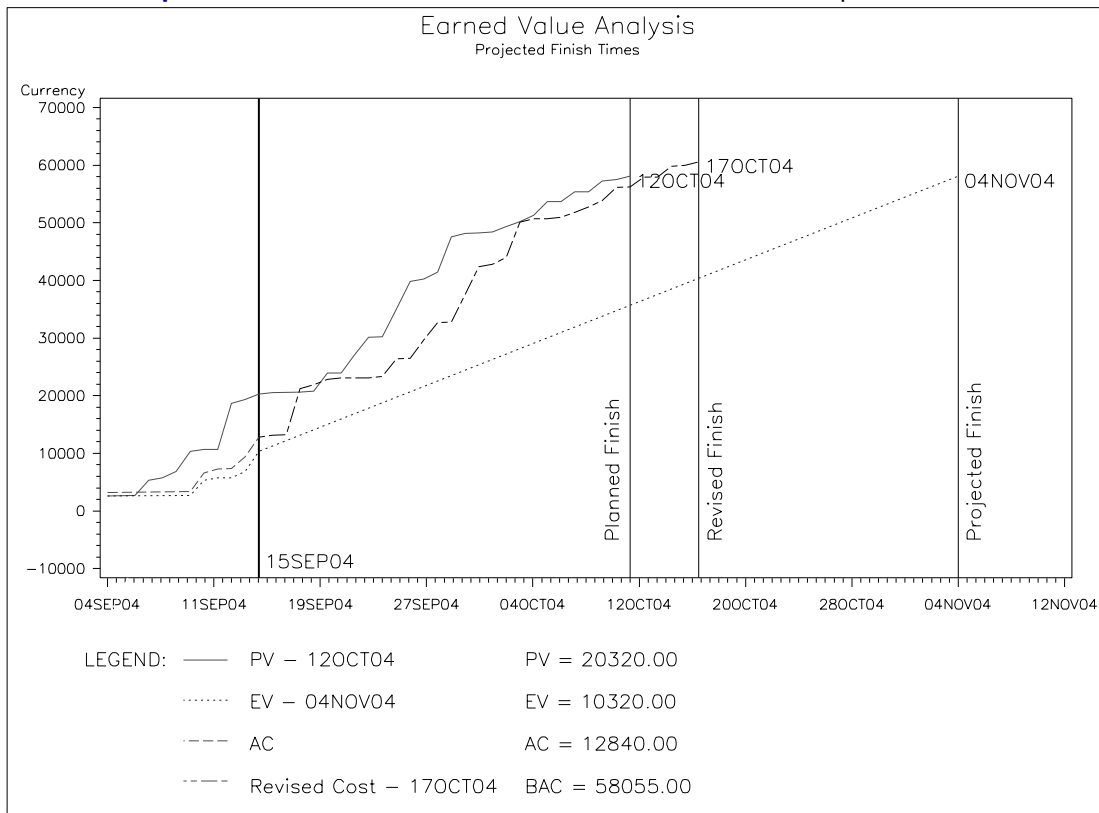


The %EVG_SCHEDULE_PLOT macro is used to show different estimates of the project completion date.

```
%evg_schedule_plot;
```

The plot is shown in [Output 9.2.12](#).

Output 9.2.12. %EVG_SCHEDULE_PLOT: Estimated Completion Dates

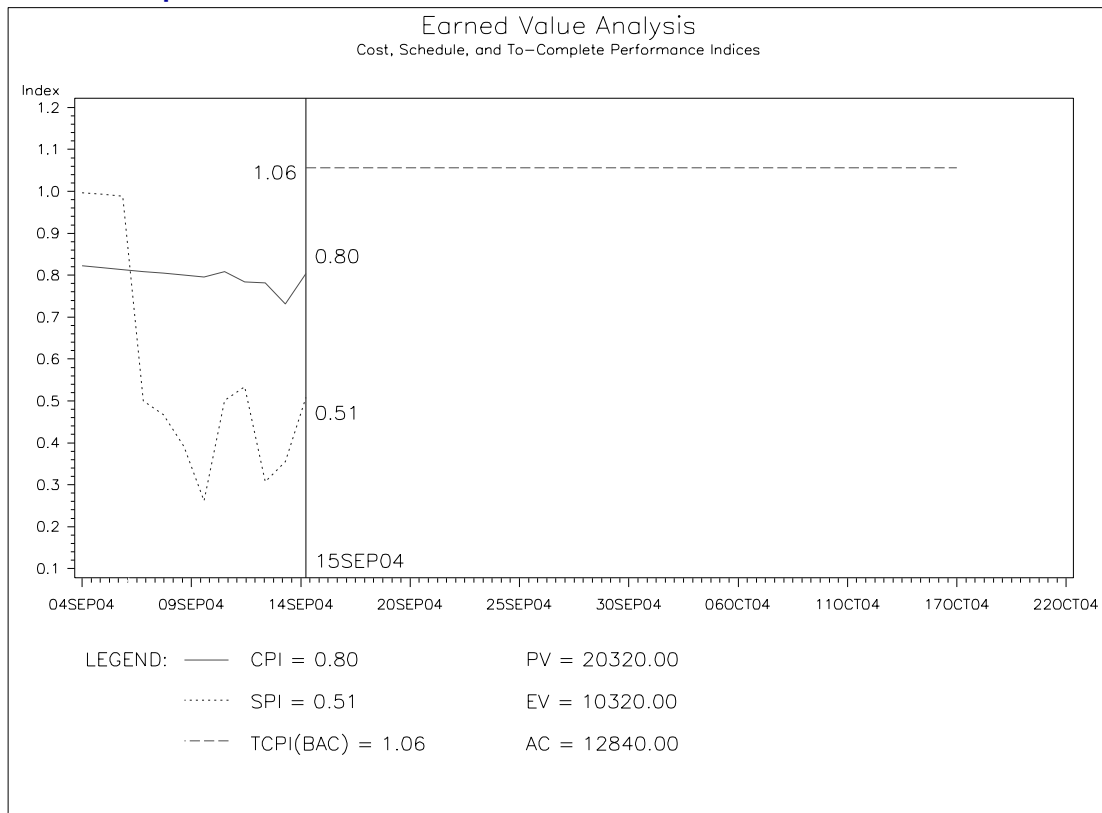


The %EVG_INDEX_PLOT macro is used to graphically display the performance indices for the project.

```
%evg_index_plot;
```

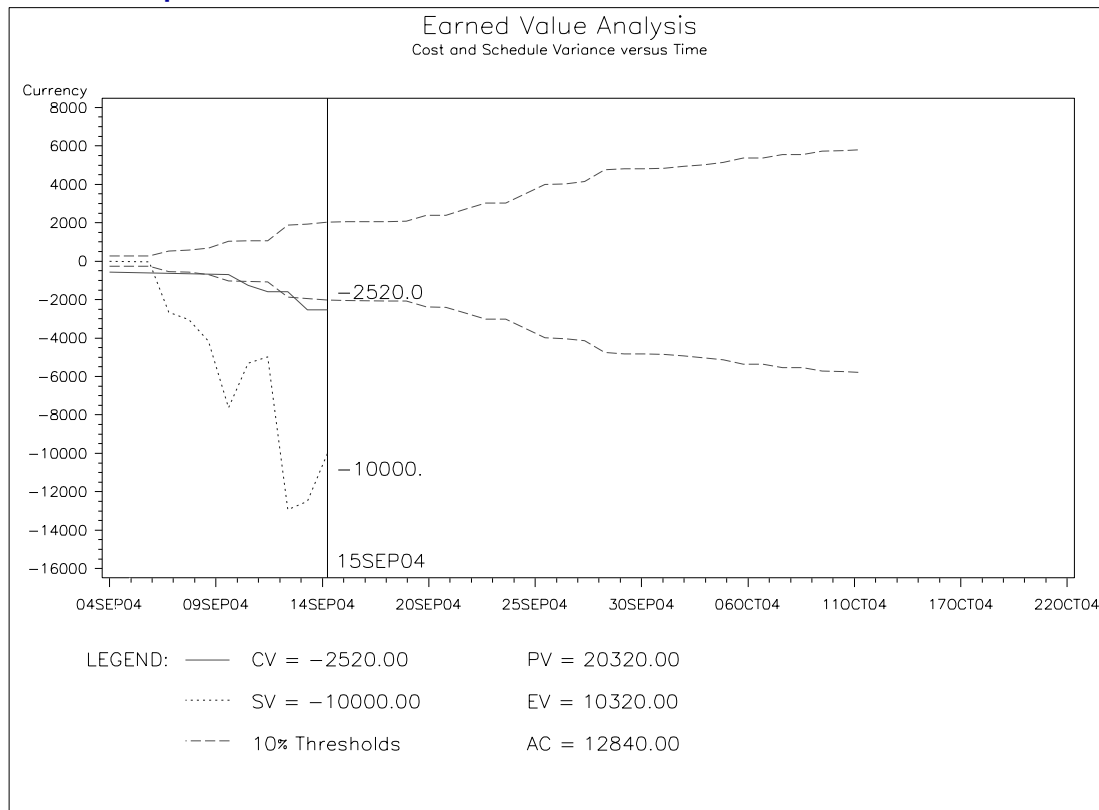
The plot is shown in [Output 9.2.13](#). As in the previous example, the cost performance needs to increase from 0.8 to 1.06 in order to stay within the budget.

Output 9.2.13. %EVG_INDEX_PLOT: CPI, SPI, and TCPI



The Cost and Schedule Variance for the project is shown in [Output 9.2.14](#) using the following call to the %EVG_VARIANCE_PLOT macro:

```
%evg_variance_plot;
```

Output 9.2.14. %EVG_VARIANCE_PLOT: Cost and Schedule Variance

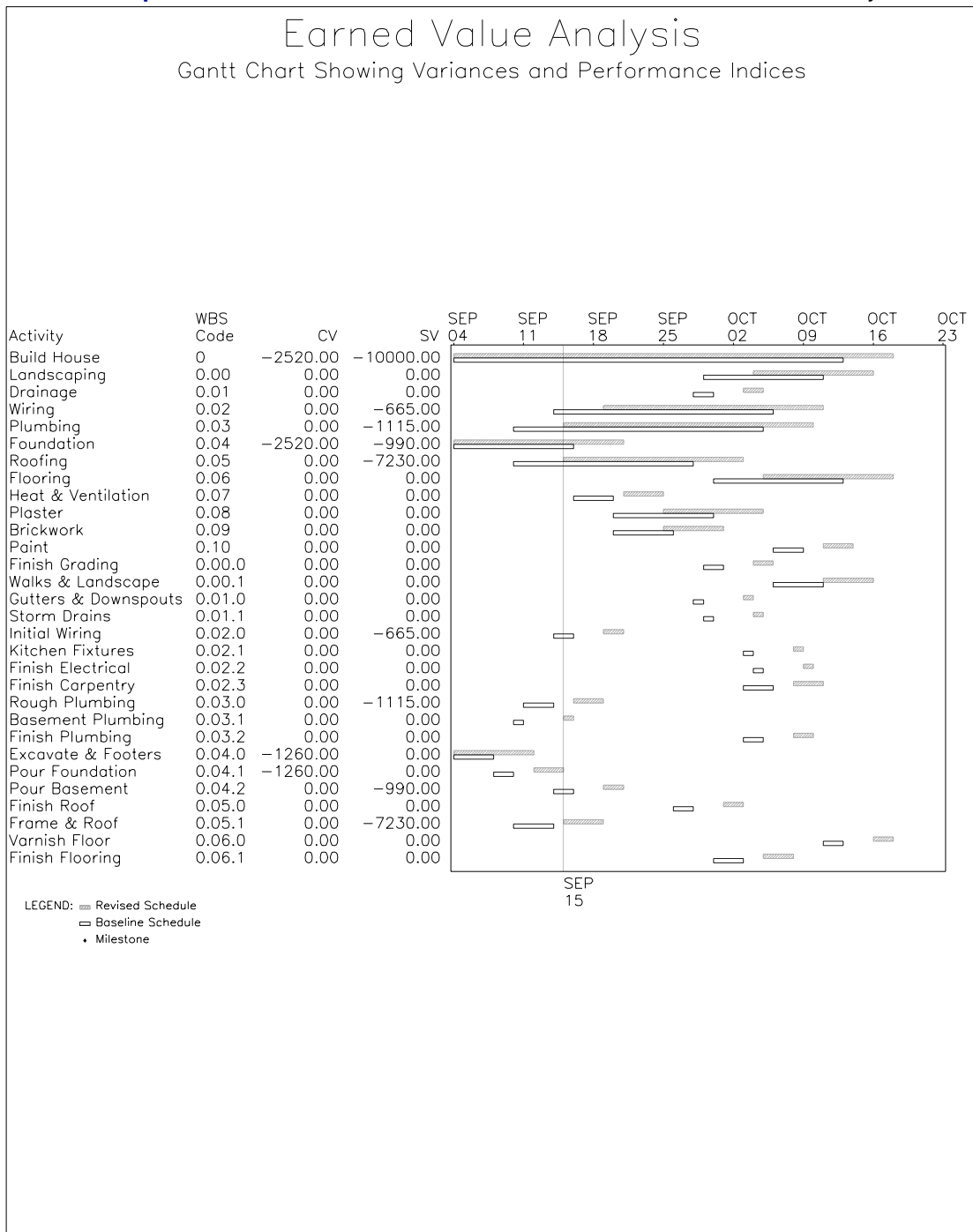
While the Cost Variance is just outside the 10% threshold, the Schedule Variance is significantly outside and should be a warning signal that the project is slipping significantly. The plan called for \$20,320 of work to be completed, but only \$10,320 has been accomplished so far (roughly 50% of the goal).

Finally, the %EVG_GANTT_CHART macro is used to show a Gantt view of the project along with some metrics by task. In this case, only the Work Breakdown Structure code and Cost Variance (CV) and Schedule Variance (SV) are selected.

```
%evg_gantt_chart (
  activity=id,
  plansched=gbsched,
  revisesched=gasched,
  start=start,
  finish=finish,
  timenow='15SEP04'd,
  id=wbs cv sv,
  height=3,
  scale=20
);
```

The resulting Gantt chart is shown in [Output 9.2.15](#).

Output 9.2.15. %EVG_GANTT_CHART: Cost and Schedule Variance by Task



References

Fleming, Q. W. and Koppelman, J. M. (2000), *Earned Value Project Management*, Second Edition, Newtown Square, PA: Project Management Institute.

Project Management Institute (1996), *A Guide to the Project Management Body of Knowledge*, Upper Darby, PA.

SAS Institute Inc. (1993), *SAS/OR Software: Project Management Examples*, Cary, NC: SAS Institute Inc.

Appendix A

Glossary of Project Management Terms

A

Activity

An element of work performed during the course of a project. An activity normally has an expected duration, an expected cost, and expected resource requirements. Activities are often subdivided into tasks.

Activity delay

The maximum amount of time that an activity can be delayed due to lack of resources.

Activity-on-arrow (AOA)

See *arrow diagramming method*.

Activity-on-node (AON)

See *precedence diagramming method*.

Activity priority

A priority value assigned to activities to provide an ordering for activities that are waiting for resources (during resource-constrained scheduling).

Activity splitting

Allowing activities to be split into segments during resource allocation. In some instances, preemption of activities may free a resource to be used by a more [critical activity](#).

Actual Cost of Work Performed (ACWP)

Total costs incurred (direct and indirect) in accomplishing work during a given time period. See also *earned value*.

Actual Finish date (AF)

The calendar date work actually ended on an activity. It must be prior to the [timenow date](#).

Actual Start date (AS)

The calendar date work actually began on an activity. It must be prior to the [timenow date](#).

Aggregation

Using activity resource requirements to calculate total resource needs rather than to constrain the project schedule. Normally, resource requirements are used to perform [resource-constrained scheduling](#).

Alignment type

The alignment type is used to identify the type of constraint associated with a [target date](#). The following types are available:

- Finish On
- Finish On or After
- Finish On or Before
- Start On
- Start On or After
- Start On or Before
- Mandatory Start
- Mandatory Finish

Arrow

The graphic representation of an activity. See also [arrow diagramming method](#).

Arrow diagramming method

A network diagramming technique in which activities are represented by arrows. The tail of the arrow represents the start and the head represents the finish of the activity (the length of the arrow does not represent the expected [duration](#) of the activity). Activities are connected at points called nodes (usually drawn as small circles) to illustrate the sequence in which the activities are expected to be performed. See also [precedence diagramming method](#).

As-of date

See [timenow date](#).

B

Backward pass

The calculation of late finish dates and late start dates for the uncompleted portions of all network activities. Determined by working backwards through the network logic from the project's end date. The end date can be specified, although it is usually calculated in a [forward pass](#).

Baseline schedule

A project schedule consisting of baseline **start** and **finish** dates, which represent an estimated or expected schedule, or both. This schedule is often derived from an initial set of **early**, **late**, or **scheduled** finish dates. Typically, once a baseline schedule is established, it does not change over the course of a project.

Baseline Finish date (BF)

The calendar date when work is scheduled to end on an activity. This date is usually estimated, or it can be derived from the **early**, **late** or **scheduled** finish dates. Typically, once a **baseline schedule** is established, it does not change over the course of the project.

Baseline Start date (BS)

The calendar date when work was scheduled to begin on an activity. This date is usually estimated, or it can be derived from the **early**, **late**, or **scheduled** start dates. Typically, once a **baseline schedule** is established, it does not change over the course of the project.

Budget at Completion (BAC)

The estimated total cost of the project when done.

Budgeted Cost of Work Performed (BCWP)

The sum of the approved cost estimates (including any overhead allocation) for activities (or portions of activities) completed during a given period (usually project-to-date). See also *earned value*.

Budgeted Cost of Work Scheduled (BCWS)

The sum of the approved cost estimates (including any overhead allocation) for activities (or portions of activities) scheduled to be performed during a given period (usually project-to-date). See also *earned value*.

C**Calendar**

A calendar identifies project work days, and it can be altered so that weekends, holidays, vacation, weather days, and so forth are not included.

Cost Performance Index (CPI)

The ratio of budgeted costs to actual costs (BCWP/ACWP). The CPI is often used to predict the magnitude of a possible cost overrun using the following formula: original cost estimate/CPI = projected cost at completion. See also *earned value*.

Cost variance (CV)

(1) Any difference between the estimated cost of an activity and the actual cost of an activity.

(2) In earned value, BCWP less ACWP.

Critical activity

Any activity on the [critical path](#).

Critical path

The series of activities of a project that determines the earliest completion of the project. The critical path generally changes from time to time as activities are completed ahead of or behind schedule. The critical path is usually defined as those activities with [total float](#) less than or equal to zero. See also [critical path method](#).

Critical path method (CPM)

A network analysis technique used to predict project duration by analyzing which sequence of activities (which [path](#)) has the least amount of scheduling flexibility (the least amount of [total float](#)). Early dates are calculated by means of a [forward pass](#) using a specified start date. Late dates are calculated by means of a [backward pass](#) starting from a specified completion date (usually the forward pass's calculated project early finish date).

Cycle

See [loop](#).

D

Data date

See [timenow date](#).

Dependency

See [logical relationship](#).

Duration

The number of work periods (not including [holidays](#) or other nonworking periods) required to complete an activity or set of activities. All activity durations are specified with the same [duration unit](#).

Duration unit

The duration unit specifies the unit of time for the [duration](#) of each activity in the project. The following choices are available:

- Second

- Minute
- Hour
- Day
- Weekday
- Week
- Month
- Qtr
- Year

E

Early Finish date (EF)

In the [critical path method](#), the earliest possible point in time at which the uncompleted portions of an activity (or the project) can finish, based on the network logic and any schedule constraints. Early finish dates can change as the project progresses and changes are made to the project plan.

Early Start date (ES)

In the [critical path method](#), the earliest possible point in time at which the uncompleted portions of an activity (or the project) can start, based on the network logic and any schedule constraints. Early start dates can change as the project progresses and changes are made to the project plan.

Earned value (EV)

(1) A method for measuring project performance. It compares the amount of work that was planned with what was actually accomplished to determine if cost and schedule performance is as planned. See also [actual cost of work performed](#), [budgeted cost of work performed](#), [budgeted cost of work scheduled](#), [cost variance](#), [cost performance index](#), [schedule variance](#), and [schedule performance index](#).

(2) The [budgeted cost of work performed](#), for an activity or group of activities.

Earned value analysis

See definition (1) under [earned value](#).

Effort

The number of labor units required to complete an activity or other project element. Usually expressed as staffhours, staffdays, or staffweeks. Should not be confused with [duration](#).

Estimate at Completion (EAC)

The expected total cost of an activity, group of activities, or the project when the defined scope of work has been completed. Most techniques for forecasting EAC include some adjustment of the original cost estimate based on project performance to date. Also called “estimated at completion.” Often shown as $EAC = \text{Actuals-to-date} + ETC$. See also *earned value* and *estimate to complete*.

Estimate to Complete (ETC)

The expected additional cost needed to complete an activity, a group of activities, or the project. Most techniques for forecasting ETC include some adjustment to the original cost estimate based on project performance to date. Also called “estimated to complete.” See also *earned value* and *estimate at completion*.

F

Float

See *total float*.

Forward pass

The calculation of the early start and early finish dates for the uncompleted portions of all network activities. See also *backward pass*.

Free float (FF)

The amount of time an activity can be delayed without delaying the *early start* of any immediate *successor* activities. See also *total float*.

G

Gantt chart

A graphic representation of work activities shown by a time-scaled bar chart.

Graphical Evaluation and Review Technique (GERT)

A *network analysis* technique that allows for conditional and probabilistic treatment of *logical relationships* (that is, some activities may not be performed).

H

Holiday

A period of time within the project timeframe when work cannot be scheduled. Holidays can be assigned to one or more *calendars*.

L

Lag

A modification of a [logical relationship](#) that directs a delay of the successor task. For example, in a finish-to-start dependency with a 10-day lag, the successor activity can start 10 days after the predecessor has finished. See also [lead](#).

Late Finish date (LF)

In the [critical path method](#), the latest possible point in time that an activity can be completed without delaying a specified milestone (usually the project finish date).

Late Start date (LS)

In the [critical path method](#), the latest possible point in time that an activity can begin without delaying a specified milestone (usually the project finish date).

Lead

A modification of a [logical relationship](#) that allows an acceleration of the successor task. For example, in a finish-to-start dependency with a 10-day lead, the successor activity can start 10 days before the predecessor has finished. See also [lag](#).

Logic

The collection of activity dependencies that make up a project [network diagram](#).

Logic diagram

See [network diagram](#).

Logical relationship

A dependency between two project activities. The four possible types of logical relationships are

- Finish-to-start – the “from” activity must finish before the “to” activity can start.
- Finish-to-finish – the “from” activity must finish before the “to” activity can finish.
- Start-to-start – the “from” activity must start before the “to” activity can start.
- Start-to-finish – the “from” activity must start before the “to” activity can finish.

Finish-to-start is defined as the standard (or default) logical relationship.

Loop

A **network path** that passes the same **node** twice. Loops cannot be analyzed using traditional **network analysis** techniques such as **CPM** and **PERT**. Loops are allowed in **GERT**.

M

Maximum number of segments

This value specifies the maximum number of segments that an activity can be split into when **activity splitting** is allowed.

Milestone

A significant event in the project, usually completion of a major deliverable.

Minimum segment duration

This value specifies the minimum **duration** of a segment of an activity when **activity splitting** is allowed.

N

Near-critical activity

An **activity** that has low **total float**.

Network

See *network diagram*.

Network analysis

The process of identifying early and late start and finish dates for the uncompleted portions of project activities. See also *critical path method*, *Program Evaluation and Review Technique*, and *Graphical Evaluation and Review Technique*.

Network diagram

A schematic display of the logical relationships of project activities. Always drawn from left to right to reflect project chronology. Often incorrectly referred to as a "PERT chart."

Network logic

See *logic*.

Network path

Any continuous series of connected activities that make up a project **network diagram**.

Node

One of the defining points of a network; a junction point joined to some or all of the other dependency lines. Also, the graphic representation of an activity. See also *arrow diagramming method* and *precedence diagramming method*.

Nonstandard logical relationship

A dependency between two project activities that is not the standard finish-to-start relationship. See *logical relationship* for the four possible types of relationships.

O**Organizational breakdown structure (OBS)**

A depiction of the project organization arranged so as to relate [work packages](#) to organizational units.

Overlap

See *lead*.

P**Parent task**

See *supertask*.

Path

A set of sequentially connected activities in a project [network diagram](#).

Path float

See *total float*.

Percent complete

An estimate, expressed as a percent, of the amount of work that has been completed on an activity or group of activities.

PERT chart

A specific type of project [network diagram](#). See *Program Evaluation and Review Technique*.

Precedence diagramming method (PDM)

A network diagramming technique in which activities are represented by boxes (or nodes). Activities are linked together by [precedence relationships](#) to show the sequence in which the activities are to be performed.

Precedence relationship

The term used in the [precedence diagramming method](#) for a [logical relationship](#). In current usage, however, precedence relationship, logical relationship, and dependency are widely used interchangeably regardless of the diagramming method in use.

Predecessor activity

Any activity that exists on a common path with the activity in question and occurs before the activity in question.

Preemption

See [activity splitting](#).

Program Evaluation and Review Technique (PERT)

An event-oriented [network analysis](#) technique used to estimate project duration when there is a high degree of uncertainty with the individual activity duration estimates. PERT applies the [critical path method](#) to a weighted average duration estimate.

Project

A temporary endeavor undertaken to create a unique product or service. A project consists of one or more [activities](#).

Project management

The application of knowledge, skills, tools, and techniques to project activities in order to meet or exceed stakeholder needs and expectations from a project.

Project Management Body of Knowledge (PMBOK)

An inclusive term that describes the sum of knowledge within the profession of project management. As with other professions such as law, medicine, and accounting, the body of knowledge rests with the practitioners and academics who apply and advance it. The PMBOK includes proven, traditional practices that are widely applied as well as innovative and advanced ones that have seen more limited use.

Project network diagram

See [network diagram](#).

Project schedule

The planned dates for performing activities and the planned dates for meeting milestones.

R

Remaining duration

The amount of time needed to complete an activity.

Resource-constrained scheduling

The scheduling of activities in a project with the knowledge of certain resource constraints and requirements. This process adjusts activity **scheduled start** and **finish** dates to conform to resource availability and use.

Resource leveling

Any form of **network analysis** in which scheduling decisions (start and finish dates) are driven by resource management concerns (for example, limited resource availability or difficult-to-manage changes in resource levels).

S**Schedule**

See *project schedule*.

Schedule analysis

See *network analysis*.

Schedule performance index (SPI)

The ratio of work performed to work scheduled (BCWP/BCWS). See *earned value*.

Schedule variance

- (1) Any difference between the scheduled completion of an activity and the actual completion of that activity.
- (2) In *earned value*, BCWP less BCWS.

Scheduled Finish date (SF)

The date when the activity is scheduled to be completed using the **resource-constrained scheduling** process.

Scheduled Start date (SS)

The date when the activity is scheduled to begin using the **resource-constrained scheduling** process. This date is equal to or greater than the **early start date**.

Slack

Term used in **PERT** for float (see also *total float*).

Subtask

An activity that is contained within a **supertask**.

Successor activity

Any activity that exists on a common path with the activity in question and occurs after the activity in question.

Supertask

An aggregate or summary activity that contains one or more activities (or [subtasks](#)) such that no subtask can begin until the supertask has begun and the supertask cannot end until all of the subtasks have ended.

T

Target date

A date used to constrain the start or finish of an activity. The type of constraint is identified by an [alignment type](#).

Task

See *activity*.

Timenow date

The calendar date that separates actual (historical) data from future (scheduled) data.

Total Float (TF)

The amount of time that an activity can be delayed from its [early start](#) without delaying the project finish date. Total float is a mathematical calculation and can change as the project progresses and changes are made to the project plan. Also called “float,” “slack,” and “path float.” See also *free float*.

W

Work breakdown structure (WBS)

A deliverable-oriented grouping of project elements that organizes and defines the total scope of the project. Each descending level represents an increasingly detailed definition of a project component. Project components can be products or services.

Work packages

A deliverable at the lowest level of the [work breakdown structure](#). A work package can be divided into activities.

Workshift

One or more pairs of on/off working times that define the valid working periods within a single day.

References

Project Management Institute (1996), *A Guide to the Project Management Body of Knowledge*, Upper Darby, PA.

Appendix B

Glossary of Earned Value Management Terms

A

AC

See *Actual Cost*.

ACWP

See *Actual Cost*.

Actual Cost

Total costs incurred that must relate to whatever cost was budgeted within the *Planned Value* and *Earned Value* (which can sometimes be direct labor hours alone, direct costs alone, or all costs including indirect costs) in accomplishing work during a given time period.

Actual Cost of Work Performed

See *Actual Cost*.

B

BAC

See *Budget at Completion*.

BCWP

See *Earned Value*.

BCWS

See *Planned Value*.

Budget at Completion

The sum of the total budgets for a project.

Budgeted Cost of Work Performed

See *Earned Value*.

Budgeted Cost of Work Scheduled

See *Planned Value*.

C

CPI

See *Cost Performance Index*.

CV

See *Cost Variance*.

CV%

See *Cost Variance Percentage*.

Cost Performance Index

The cost efficiency ratio of *Earned Value* to *Actual Cost*. CPI is often used to predict the magnitude of a possible cost overrun using the following formula: $\frac{BAC}{CPI} =$ projected cost at completion. $CPI = \frac{EV}{AC}$.

Cost Variance

The difference between the *Earned value* of an activity and the *Actual Cost* of that activity, i.e., $CV = EV - AC$.

Cost Variance Percentage

Cost Variance relative to Earned Value: $CV\% = \frac{CV}{EV}$.

E

EAC

See *Estimate at Completion*.

ETC

See *Estimate to Complete*.

EV

See *Earned Value*.

Earned Value

The physical work accomplished plus the authorized budget for this work. The sum of the approved cost estimates (may include overhead allocation) for activities (or portions of activities) completed during a given period (usually project-to-date). Previously called the budgeted cost of work performed (BCWP) for an activity or group of activities.

Earned Value Management

A method for integrating scope, schedule, and resources, and for measuring project performance. It compares the value of work that was planned, the value of work that was actually completed, and the amount of money that was actually spent, to determine if cost and schedule performance are as planned.

Estimate at Completion

The expected total cost of an activity, a group of activities, or the project when the defined scope of work has been completed. Most techniques for producing the EAC include some adjustment of the original cost estimate, based on actual project performance to date. This metric is derived from the ETC as follows: $EAC = AC + ETC$. See *Estimate to Complete*.

Estimate to Complete

The expected additional cost needed to complete an activity, a group of activities, or the project. Most techniques for producing the ETC factor in the project performance to date. The revised ETC, or ETC_{rev} , is the cumulative cost from the status date to the project completion date, according to the revised schedule and costs. The other three formulations used in this document appear in the following illustration:

$$ETC_{OTD} = BAC - EV$$

$$ETC_{CPI} = \frac{BAC - EV}{CPI} = \frac{BAC}{CPI}$$

$$ETC_{CPI \times SPI} = \frac{BAC - EV}{CPI \times SPI}$$

P**PV**

See *Planned Value*.

Percentage Complete

The percentage of total earned value that has been accumulated for a project:

$$\text{Percentage Complete} = \frac{EV}{BAC}$$

Planned Value

The physical work scheduled, plus the authorized budget to accomplish the scheduled work. Previously, this was called the budgeted cost of work scheduled (BCWS).

S**SPI**

See *Schedule Performance Index*.

SV

See *Schedule Variance*.

SV%

See *Schedule Variance Percentage*.

Schedule Performance Index

The schedule efficiency ratio of *Earned Value* accomplished against the *Planned Value*. The SPI describes what portion of the planned schedule was actually accomplished. $SPI = \frac{EV}{PV}$.

Schedule Variance

The difference between the *Earned value* and the *Planned value* of the project at any point in time, i.e., $SV = EV - PV$.

Schedule Variance Percentage

Schedule Variance relative to Planned Value:

$$SV\% = \frac{SV}{PV}$$

T**TCPI**

See *To-Complete Performance Index*.

To-Complete Performance Index

The cost of remaining work divided by the remaining budget or estimated budget:

$$TCPI(BAC) = \frac{BAC - EV}{BAC - AC}$$

$$TCPI(EAC) = \frac{BAC - EV}{EAC - AC}$$

V**VAC**

See *Variance at Completion*.

VAC%

See *Variance at Completion Percentage*.

Variance at Completion

The difference between the original budget and the current estimate at completion:
 $VAC = BAC - EAC$.

Variance at Completion Percentage

The Variance at Completion relative to the Budget at Completion: $VAC\% = \frac{VAC}{BAC}$.

W

WBS

See *Work Breakdown Structure*.

Work Breakdown Structure

The project hierarchy.

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