MPUG

The Project Network

The Newsletter of the Microsoft Project Users Group—National

Volume 2, Issue 1, Winter 1998

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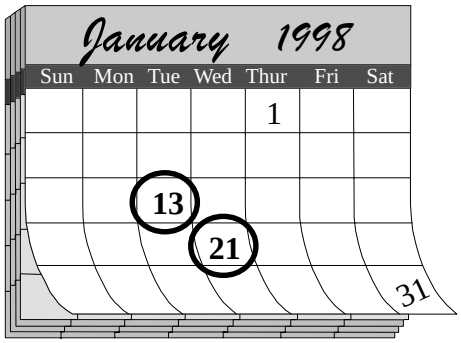

1998 Kick-off Meetings!!!

Mark your calendars for our winter '98 MPUG regional meetings.

Microsoft Project software enhancements and issues along with some great user case studies will be presented.

Southwest Chapter: January 13, 1998. Held at the Red Lion Inn, 6161 W. Centinela Avenue, Los Angeles, CA, from 2-5 p.m. and is repeated again from 6-9 p.m. on the same night to handle attendance demand. Please let the MPUG office know which session you expect to attend. Look for signs at the hotel for the exact meeting room.

Great Lakes Chapter: January 21, 1998. Location and times to be announced.

Refer to the MPUG Web for directions and meeting details. **Be sure to contact the MPUG office for your reservation, as these meetings are sure to fill!**

MPUG Web to Offer "Members Only" Information!

It is the intention of the MPUG Board to move the Web discussion group (newsgroup), library files and feature articles to a "Members Only" section where our MPUG staff can offer assistance to monitor and maintain what goes on. This will also allow MPUG to provide members with Microsoft non-disclosed software information as we become aware of it.

In order to make this happen, members will need to submit to MPUG, either via the Web, phone or Email, their choice of a username-and-password pair (8 characters maximum each) no later than January 1, 1998. As members enter this area of the Web, they will be reminded that the information contained therein is under non-disclosure confidentiality laws, and as such, MPUG members are bound by their agreement to view it, that they will abide by the Microsoft non-disclosure legalities. If anyone is found to abuse or misuse this information, it will become terms for membership expulsion (without refund of dues paid) and a possible legal suit from Microsoft!

Check the Web at www.mpug.org

Please take a look at our entire Web and let us know what you think! Suggestions and input are always welcome! We've even included a "Check this Out!" section to provide newsletter readers with answers to the "Just for Fun" puzzles. If you should experience any problems, please contact our webmaster or me at mpug@pcubed.com, or call 313-741-7770.

Gail Stopar, Editor and Communication Director

The MPUG Mission

To provide the installed user base of Microsoft Project with a forum to exchange ideas, support, and experience in order to better understand and utilize all Microsoft Project related products. MPUG is an independent users group formed with the support and recognition of Microsoft. We will actively seek out related organizations, both nationally and internationally, and collaborate with them to encourage the appropriate exchange of information to MPUG membership for all levels of Microsoft Project experience.

Greetings,

Welcome!!!

Pat McMurtry
MPUG President

Pat McMurtry and one of our SIG Coordinators, Kathleen Carter

I would like to take a few moments of your time to introduce myself and tell you a bit about the MPUG Board. My name, as the byline indicates, is Pat McMurtry. At the MPUG Board meeting on November 4, 1997, I was appointed President of the MPUG Board. To give you a little background about myself. I am currently working for Program Planning Professionals (Pcubed) as a project management consultant to Ford Motor Company. I am supervising a small team that is supporting the corporate-wide roll-out of a new, integrated product development software package. Previous to my employment with Pcubed, I worked for a series of small consulting companies in the field of human-machine interface design. I have a master's degree in applied experimental psychology/ergonomics. Over the course of a 12-year career in human factors, I advanced to the position of supervising small teams of designers, and functioning as the project manager for the contracts we supported. Among my near-term goals with Pcubed is to gain PMI certification, and broaden my experience in integrated project management.

Those of you who recall a gentleman by the name of Ted Mawson, introduced as the Chairman of the MPUG Board, will be saddened to learn that Mr. Mawson will be unable to finish out his term of office. No... Mr. Mawson is in good health, and has not been placed in the witness protection program. He simply found that his work and family duties did not allow him to devote as much time as he would have liked (and the position demanded) to fulfill the obligations of Board Chairman. The title of Chairman is retiring, along with Ted. Why, you might ask. That, I am afraid, is fated to remain one of MPUG's deepest mysteries. The responsibility of MPUG to its members, however, remains clear. I intend to work closely with the remaining members of the Board to ensure that MPUG provides more than enough service to its members to justify the cost of membership.

Speaking of the cost of membership, please note that the Great Lakes Region free membership offer expired on October 1, 1997, and new members in that area will need to pay the $75 annual fee to take advantage of all that MPUG has to offer. As well, beginning in April of 1998, existing members will find their memberships coming up for renewal. (A most fortuitous month, no doubt, for having an additional expense on the budget!) One of the goals of the Board, among the many discussed at the meeting, is to compile a list of the services that MPUG provides, or will soon be providing, for distribution to existing and prospective members. For future services, an implementation schedule will be included as well. Our goal is to leave you fully assured that MPUG is worth your investment!

Back on the more important topic of MPUG business, the Board meeting on the 4th outlined the next steps for making MPUG a true nationwide organization, and established the timetable for putting the organization's foundation documents in place. The Board members have in their hands drafts of an MPUG constitution and SIG charter procedures for review and comments. A final version of both documents will be voted on at the next Board meeting in mid-December.

Another item addressed during the meeting came from a source that I expect to be a regular feature of every Board meeting: Member Requests. Two separate member requests were made for permission to start a local chapter of MPUG in their area. The entire Board welcomed the enthusiasm that the requests represented, and placed on the Action Item list a task to develop procedures for chartering chapters! We plan to accept applications for chapters in the 1st quarter of 1998, and issue charters beginning in the 2nd quarter. The procedures for chartering a chapter should be available for distribution in January.

Some of you may have missed the Fall newsletter! Our understanding is that the U.S. Postal Service lost most, if not all, of the newsletters intended for the Great Lakes region! Without knowing which members did, or did not, receive the newsletter, and with this Winter '98 newsletter scant weeks from delivery itself, we decided not to re-send the issue. There are, however, a limited number of the newsletters still available. Any member who did not receive their newsletter and would like to keep their series complete for higher value on the collectibles market, please send a request to Ms. Gail Stopar. She can be reached by E-Mail at gstopar@pcubed.com, or by traditional mail at 209 S. Ashley Street, Ann Arbor, MI 48104 (With luck, the request won't get lost!).

Last, but not least, elsewhere in this newsletter you can find information on the upcoming regional MPUG meetings. The Great Lakes meeting will be the last of MPUG's inaugural year, and the Southwest regional meeting will be the first meeting for that region. Both meetings promise to be excellent forums for networking, exchanging tips on MS Project, and for picking up valuable insights from the scheduled speakers. The Board

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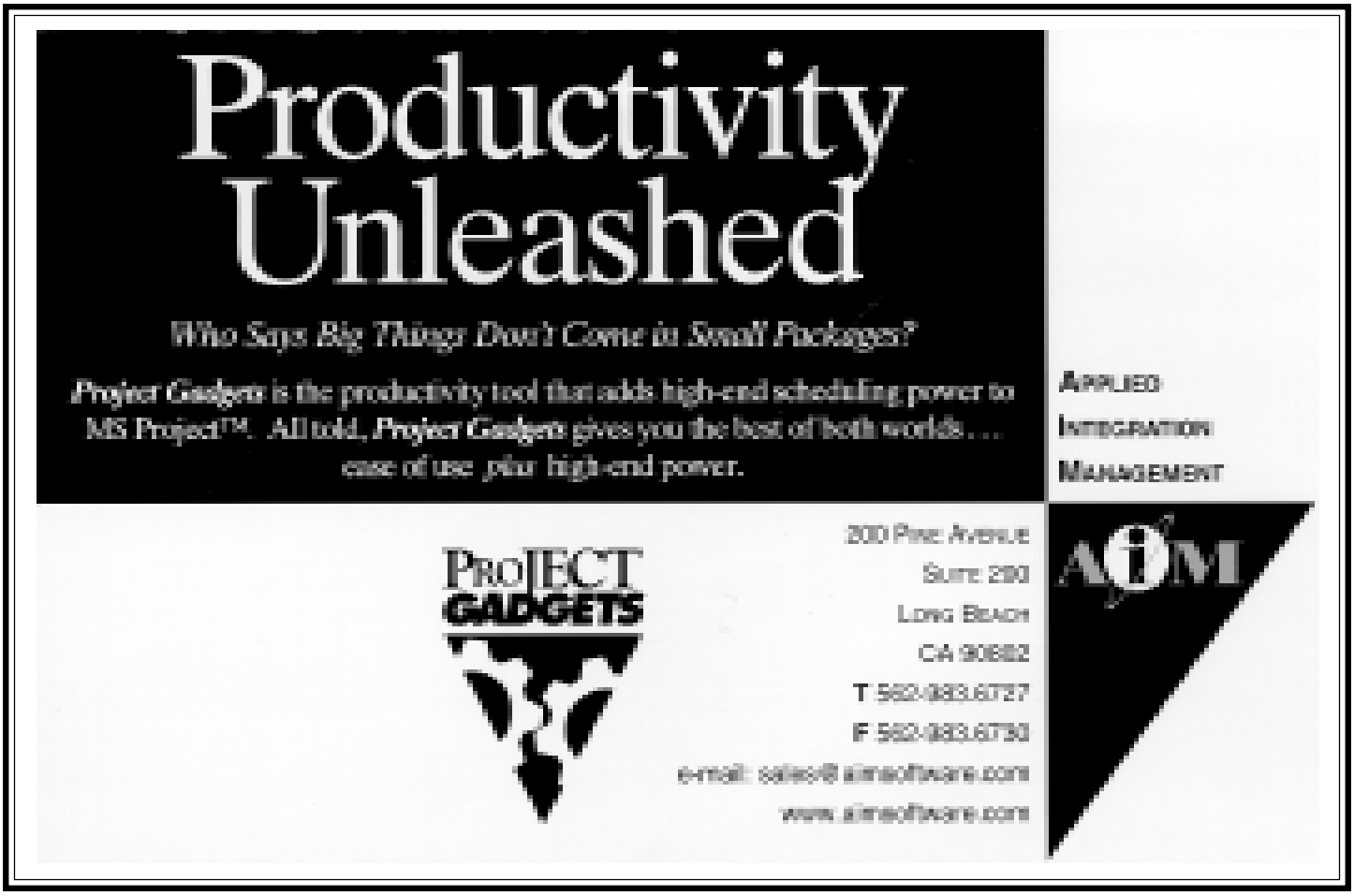
will be represented at both meetings, so if you have suggestions, complaints, or compliments, they will be gladly received, and noted at the next Board meeting. In addition to the MPUG regional meetings, there is the Project World Conference in Santa Clara, CA, in early December. While this newsletter may arrive a bit late to serve as notice for the event, I would like to mention that MPUG will be represented at the conference. Look for our booth (#608) close to the Microsoft and MicroFrame booths (and close to the food). We will be glad to sign you up as a member of MPUG! And if you are already a member, we will happily discuss any ideas you might have to make MPUG an organization that serves your MS Project needs.

I look forward to serving the members of MPUG for the duration of my term as President (by the way, Gail, how long did you say that would be?). I hope to set a standard for excellence in the office that will inspire future office holders to maintain and build on the value of the organization. I know that the quality of the remaining Board members will make the task an enjoyable and rewarding one. I also want the members of MPUG to feel free to contact me directly with questions, concerns, or comments that they may have. My E-Mail address is pmcmurtr@pcubed.com and letters can reach me at the address I listed for Gail. Wishing you all success and happiness, both professionally and personally…

Warmest regards,

Pat McMurtry
MPUG President

If you're in town, be sure to come visit us on the Project World Conference Exhibit Floor (booth 608) in Santa Clara, CA, December 10-11.



SIG Corner

This year still has several changes in store for the development of Special Interest Groups (SIGs). National SIG Coordinators, Jerry Custer and Kathleen Carter, have been working on SIG Guidelines and Procedures, a SIG Charter submittal package, and preparing contact lists for SIG Chairs.

MPUG currently has three SIGs working toward formation:

- **Information Technology** chaired by Doug Thiele (Great Lakes Chapter),
- **Project Management Methodology** chaired by Leon Blum (Great Lakes Chapter) and Ken Marks (Southwest Chapter), and
- **Industry** chaired by Steve Skornicka (Great Lakes Chapter) and Jerry Rich (Southwest Chapter).

These SIGs have developed their mission statements and are currently planning a year of activities and goals in their respective areas of interest. The Industry SIG, in particular, will provide a broad area of focus including the Automotive, Manufacturing, Health Care, Aerospace, and Legal/Financial areas of interest. This is perhaps our largest SIG to date. Our intention is to keep the industries together in this SIG until such time as the membership grows sufficiently to support a separate industry-specific SIG. At that time, MPUG will look forward to chartering another SIG.

SIGs offer a specialized area of focus to provide their membership with applications and techniques applicable to their specific jobs. Since each application of Microsoft Project has its own peculiarities and nuances, it is the SIGs efforts which will help resolve problems, show new and easier methods for capturing project information and keeping your project on track.

We envision the three SIGs working together to provide a strong and powerful network of support to our membership. As application needs are identified in each of the SIGs, they will work together to find a solution and present their accomplishments to the membership at the following MPUG meeting.

In order for the SIGs to provide this level of support successfully, it is important for SIG membership to grow. SIG chairs are working hard to support MPUG members. Feel free to contact any of the SIG Board members listed below. Show your support by joining the SIG of your choice today!

Kathleen Carter, MPUG National SIG Coordinator
313-337-8310 or 313-741-7770

Information Technology

Great Lakes Chapter

Doug Thiele: Chair, 313-990-4086 (pager)
E-Mail: thiele@pcubed.com
Jack Mitchell: Vice Chair, 248-353-4587
E-Mail: jackm@gentle.org

Southwest Chapter

Open Positions: Any Volunteers??

Project Management Methodology

Great Lakes Chapter

Leon Blum: Chair, 313-248-5400
E-Mail: lbum@ford.com
Richelle Wojtczak: Vice Chair, 313-323-7732
E-Mail: rwojtcz1@gw.ford.com

Southwest Chapter

Ken Marks: Chair, 626-812-1314
E-Mail: ken.marks@aerojet.com

Industry

Great Lakes Chapter

Steve Skornicka: Chair, 517-266-3006
E-Mail: sskorn@dura-inc.com
Michele Kargol: Vice Chair,
248-968-0103
E-Mail: kargolm@msn.com
Karen Strichartz: Communications Dir.,
248-615-0333
E-Mail: strichartz@aol.com

Southwest Chapter

Jerome Rich: Chair, 818-991-6811
E-Mail: jeromerich@aol.com

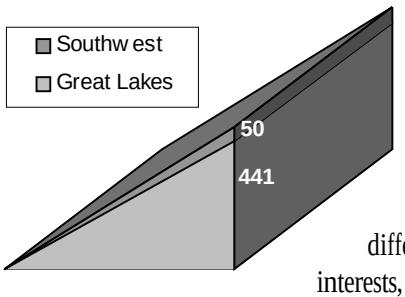
(no pictures available for Southwest or Industry SIG)

MPUG Members are Diverse!

By Gail Stopar, Membership Administrator and Editor

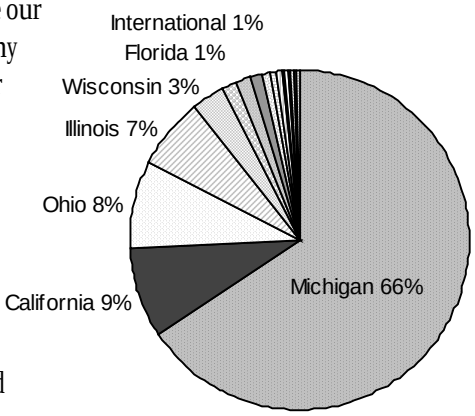
MPUG is catching on fast... Membership is on the rise... Who are these members? With MPUG going National in Fall 1997, our membership is gaining speed quickly. Adding a new Chapter in the Southwest is only the first of many new areas MPUG will be looking to expand to, in order to address the demand for local activity. Requests are coming in almost regularly for new chapters to be established. At the time of this article, there were 491 MPUG members spread out all over the U.S. and some international members. I thought you might be interested in the membership breakdown figures.

Membership by Chapter



Of those 491 members, 441 are currently in the Great Lakes area, with the Southwest growing daily as the new Chapter becomes known. Many of our MPUG members (223) belong to other organizations like PMI, IEEE, SAE, and APICS and 19 members are self-employed. The geographical disbursement shows tremendous interest across the country!

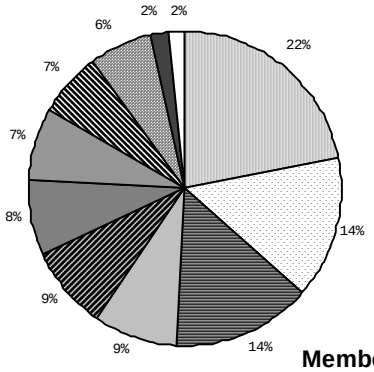
As you might expect, since our MPUG members reside in many different geographical areas, our interests, occupations and industries, too, are spread. The largest percentage of us are either Project Leaders, Project Managers, Project Planners, and Schedule Specialists (22%), with Consultants running a close second (13%).



Membership Geographically

Looking closely, however, shows us that we have a rather high number of Presidents, Owners, CEOs, VPs, and Directors in our midst (another 14%), while technical types range from Engineers to Software Specialists (17%). All this says that Microsoft Project users are decision makers and people who can influence.

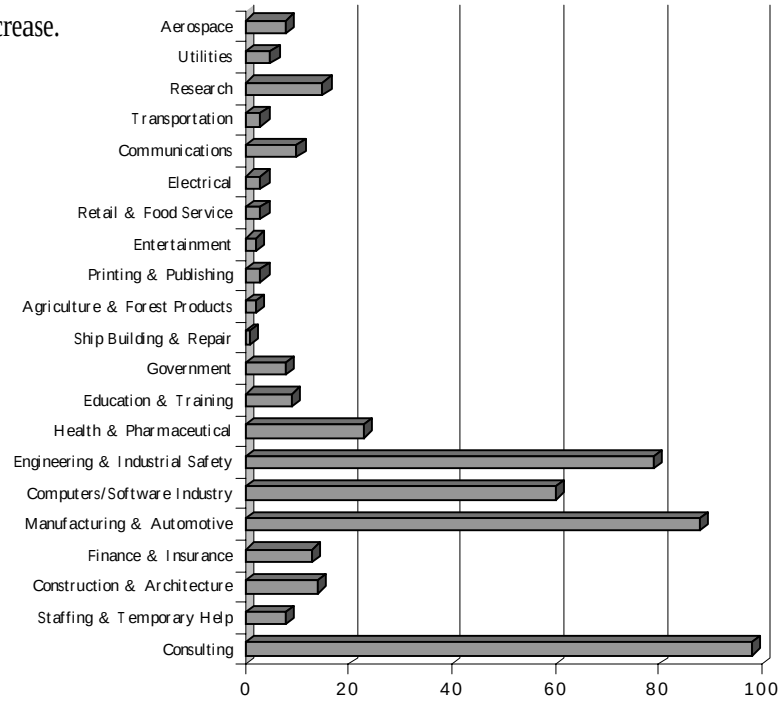
As Michigan still holds the largest number of members, due to our origination in the Great Lakes area, we expect and see that the leading industries are Automotive, Engineering, Computers and Consulting. I expect that as our membership spreads and grows in the new Southwest Chapter, we will see the Aerospace and Entertainment industry memberships increase.



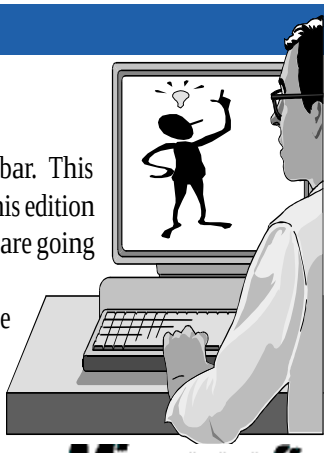
Member Occupations

- Project Leader/Manager/Planner/Scheduler
- Consultant
- President/Owner/CEO/Directors and VPs
- Account/Program Manager
- Software Specialist/Engineer/Analyst
- Engineer
- Operations Management
- IS/MIS/IT Manager
- Other
- Controller/Financial Analyst
- Trainer/Instructional Sys. Designer

Business Nature of Membership



Creating Custom Toolbars and Custom Menu Items



Many users have special macros that they have written that they want to make part of the toolbar or menu bar. This makes the macros seem like part of Microsoft Project, and gives users quick access to their custom functions. In this edition of Tips and Tricks, we will discuss how to add custom menu items and custom toolbar items, but with a twist. We are going to do it using Microsoft Project 98! It's finally out and I've just got to tell you all about it!

To add a custom menu item, click on the Tools menu, choose the Customize menu option. From the Customize menu item, choose the Toolbars submenu item. Users can click on the Commands tab (see Figure 1) and drag items up to the Microsoft Project menu bar in order to create custom menus. It's as easy as drag-and-drop. Users can also drop these custom menu items onto the toolbars to create custom toolbar items.

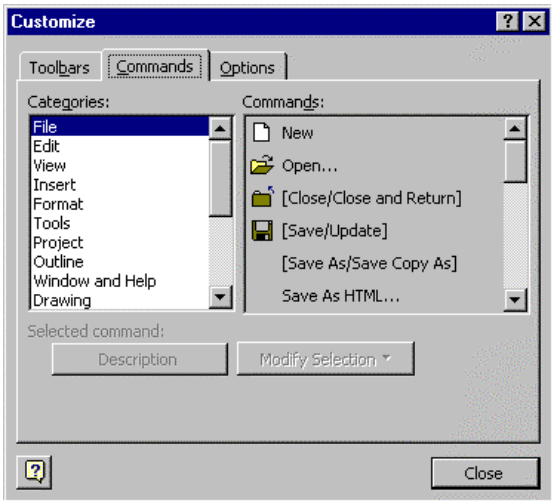


Figure 1: The Customize Commands Tab in Microsoft Project 98

Well, now we get to the real meat of this tip: How to add a custom toolbar button. It starts the same as adding a custom menu item. Click on the Tools menu, choose the Customize menu option, and choose the Toolbars submenu item. Now things get different. Choose any item from the Commands section of the Commands tab, and drag it up to the desired spot on the toolbar. Right now, its just a plain old button. Now you can click on the Modify Selection button that is on the Customize dialog. See Figure 2 for a peek.

Its got a load of items that can help you customize the toolbar button. Here you can change the button's image (using a cool button editor!), assign a new button image from a list of built in images, and change the tooltip text for the button. In addition, you can change the way the button looks. You can show just an image, or you can show an image with text, or show just text on the button. This is great for giving you a full range of features. Finally, you can choose the Assign Macro command from the Modify Selection button in order to have your toolbar button do something different and special.

Now many users would think that creating custom menus and toolbar buttons is just for developers, but I introduced it here because I disagree with that assessment. Users can create custom menus and toolbars for their company, project, or workgroup with little or no knowledge of Visual Basic. Like I said, its just a drag-and-drop feature! One of the things I try and do when I meet users is to find out what features they use most often in Microsoft Project, and make those features easily accessible. Custom toolbars can help you do the same thing. If you're tired of searching for Save Baseline, or cannot ever seem to remember where the Save to Database feature is located, then don't waste another second searching! Just create a custom menu item or toolbar button, and bring the tools you use most often closer to you.

By Doug Thiele
MPUG Wish List Administrator

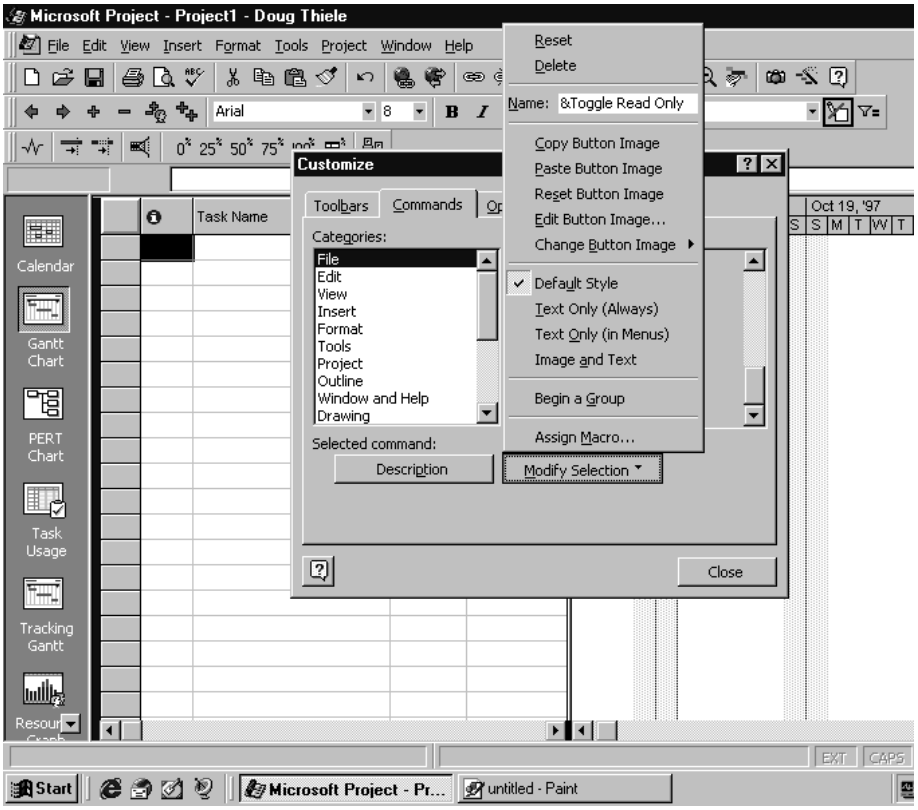


Figure 2: The Modify Selection Dialog up close

Fall Great Lakes Regional Meeting was "On the Road"

MPUG hosted its fall meetings on October 1 and 16, 1997. To give the membership a chance to attend the meetings, the site of the first Fall meeting was Chicago, during the National Project Management Institute (PMI) '97 Conference. Both meetings featured: STATPROBE, Inc., who talked about a practical way to manage projects using Microsoft Project and their project management solution; and Microsoft representatives who provided an up-close and in-depth MS Project 98 discussion. For many members, this was their first opportunity to see Microsoft Project 98. The response from attending members on the product is that it has definitely improved, and is generating a lot of excitement in the user community. Among the noticeable new and improved features are resource contouring, improved scheduling engine, split tasks, improved cost features, Oracle database interface, support for Visual Basic for Applications 5.0, and the ability to update tasks over the Internet.

Members were able to ask specific questions and discuss situations directly with the Microsoft representatives (Jennifer Cioffi and Keith Minne). Members were also told about the evaluation copy that is available on the Internet at http://www.microsoft.com/project. Download a copy and see what everyone is talking about!

On October 16th, STATPROBE, Inc. was not only a presenter, but was also our gracious host. Thanks go to Lisa Carroll for the great room set-up and wonderful beverages and Halloween cookies that made the evening very enjoyable. The STATPROBE, Inc. presentation focused on their management process of status reporting, team meetings and management review sessions. Presenters were:

- Don Schwab, Director of STATPROBE, Inc.
- Sheila Babnis, Project Manager
- Shawnda Hamilton, Project Specialist
- Janet Owens-Grillo, Project Manager

Janet Owens-Grillo, Lisa Carroll, Don Schwab, Sheila Babnis, and Shawnda Hamilton

OUR HOST and Sponsor October 16, 1997
STATPROBE, Inc.

STATPROBE, Inc. plans to present a detailed discussion of the technical side of their solution at the Spring 1998 meeting planned for May.

Joining the MPUG meeting on October 16th, was Parke-Davis. Jean Lieverman, a Senior Systems Specialist with Parke-Davis, presented MS Access and MS Project Macros, their solution to multi-project management. Jean had worked with Microsoft Project's development tools and an Access database to create a tool for generating user reports. The members attending could hardly sit still! Eventually, they burst out loud, "How can we get a copy of those Macros, or how can we get instructions on building some like them?" As follow-up to those requests, MPUG is working with Jean to acquire them; however, as we all know, permission must come from Parke-Davis legal while Jean works to generalize them. Have patience...

There was so much information presented and so much member participation in question-and-answer time, that the MPUG SIG breakout sessions were cut very short and MPUG business covered very quickly. Every effort was made to give the membership in attendance time to talk with the experts and share experiences.

Thank You Jean!!!

I hope all the attending members were pleased with the presentations at the two Fall 1998 meetings. Attendance was not as good as expected, however, and many who had reservations did not show! This makes it extremely difficult to project expenses and keep presenters interested who must travel and incur expenses themselves. Since there is no charge for these meetings, you, the membership, must show interest, or we will need to make changes accordingly. The MPUG Board is looking into this situation and would appreciate your comments (mpug@pcubed.com).

Please check our Web for updated articles, as well as more in-depth articles on Microsoft Project 98 and information about the January Regional Meetings. We will also keep our eyes on how our members are using Microsoft Project 4.0/4.1, since users won't all upgrade immediately. Please drop us an Email to let us know what you want to see in future meetings and newsletters. Your comments and interests will help us to keep our meetings "can't miss" events!

Gail Stopar, MPUG Communication Director and Editor

Preview of Project 98 a Hit in L.A.

Chris Caile and Teresa Sanders

People in Los Angeles have come to expect innovation in everything from software and electronics to entertainment and style. We were not disappointed on September 17th when approximately 200 of us converged on the Hyatt Regency Hotel in downtown Los Angeles to be among the first to see a new, improved Microsoft Project.

I arrived shortly after 8:00 a.m., so I had the opportunity to mix with the crowd who were busy taking advantage of the continental breakfast provided. They deserved it. These brave souls didn't roll out of bed before sun-up and fight L.A. freeway traffic just to kill time! They were here hoping to satisfy their wish lists. They want a more powerful Microsoft Project. One that allows resource contouring or allows users to directly enter actual costs. I met and talked with project managers from a wide variety of industries. Just to name a few, there were representatives from Hewlett-Packard, IBM, TRW, Lockheed-Martin, Paramount Pictures, City of Los Angeles Information Technology Agency, Los Angeles County's Metropolitan Transit Authority, small consulting firms, large consulting firms, the US Air Force, private consultants and major construction companies. It was clear that the 200 or so men and women attending today's preview were professionals. People serious about their work and concerned about not wasting their valuable time.

At 9:00 a.m. we were asked to tear ourselves away from the coffee and rolls and take our seats. We were greeted by an enthusiastic Ms. Selena Wilson, a Product Manager who definitely knows the product. Selena was assisted by two savvy technical engineers named Tim Johnson and Colby Africa. The two gentlemen shared Selena's enthusiasm. We began by watching a short and lively video introducing us to the Project 98 development team in Redmond, Washington. Then Selena explained Project Management Trends. First, "..the combination of rapid business change and Microsoft Corp.'s introduction of a planning tool that was truly accessible (to novices) fueled growth in the category and brought project management to an entirely new group of users—general business planners." Second, "..Microsoft research shows that the project management category is poised for a second stage of growth. This second stage is driven by the fact that customers are read to realize more business value from project management by moving from *individual* planning to *organizational* planning." This move from stand-alone use to more coordinated planning is provided by Microsoft's four Project 98 Design Goals:

1) More User Control Over Projects,
2) Improved Project Communications,
3) Project 98 as an Extension of Microsoft Office 97, and
4) Powerful Customizing Tools.

"Okay, okay Selena" we were all mumbling to our neighbors, "..now, show us the money!" In other words, let us SEE the new Microsoft Project. We want more power!

Then, without further delay, there it was. Project 98 magnified on a huge screen 1,000 times larger than I will ever see it on my laptop! Wow, the colors! The animated Office Assistant! A new group of icons running down the *left* side of the screen? Hey, this is a different version of Project, but what serious work can it do?

Selena Wilson began to demonstrate some of the 35 new features and 36 improved features. She asked us to applaud the development team whenever one of the features was especially exciting. I counted 8 times this otherwise reserved crowd applauded one of the features. Among the 71 new or improved features that I like best are:

1. New Task and Resource Views that display resource assignments grouped by tasks, or alternatively, task assignments grouped by resources;
2. Effort Driven Scheduling to control the duration of a task by assigning or removing additional resources;
3. Fixed Cost Accrual which provides 3 options for accruing costs: at the Start, at the Finish or Prorated over the duration of a task; and
4. E-mail-based Workgroup and Web-based Workgroup Features, two powerful communication features.

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There was one omission that disappointed me. Microsoft made no improvement to building or printing/plotting PERT chart, or network diagrams. Some of us "old timers" cut our teeth on those colorful, long rolls of logic diagrams when we developed our first master schedules. Well, maybe next year Microsoft?

The bottom line is Microsoft Project 98 has leaped from the low-end category of project management tools to the mid-range category. Microsoft has invested a great deal of time and money in Project 98 and it shows! It remains user friendly but now offers planning and control features needed by professional project managers. Selena told us that Microsoft just released Project 98 to manufacturing two days ago. There is little doubt that Project 98 will be more popular than ever. It is hard to believe that Microsoft Project Version 1.0 for Windows was introduced in 1990, only 7 short years ago!

Jerome Rich, MPUG Southwest Industry SIG Chairman

MPUG

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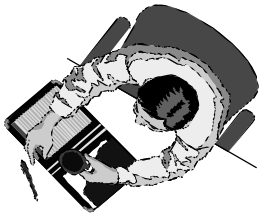
Call (313) 741-7770
Fax (313) 741-1343

Has technology been "dumped" on **your** desk?

Are your company's telecommunications issues something to be solved in your "***spare time***?"
Need HELP?



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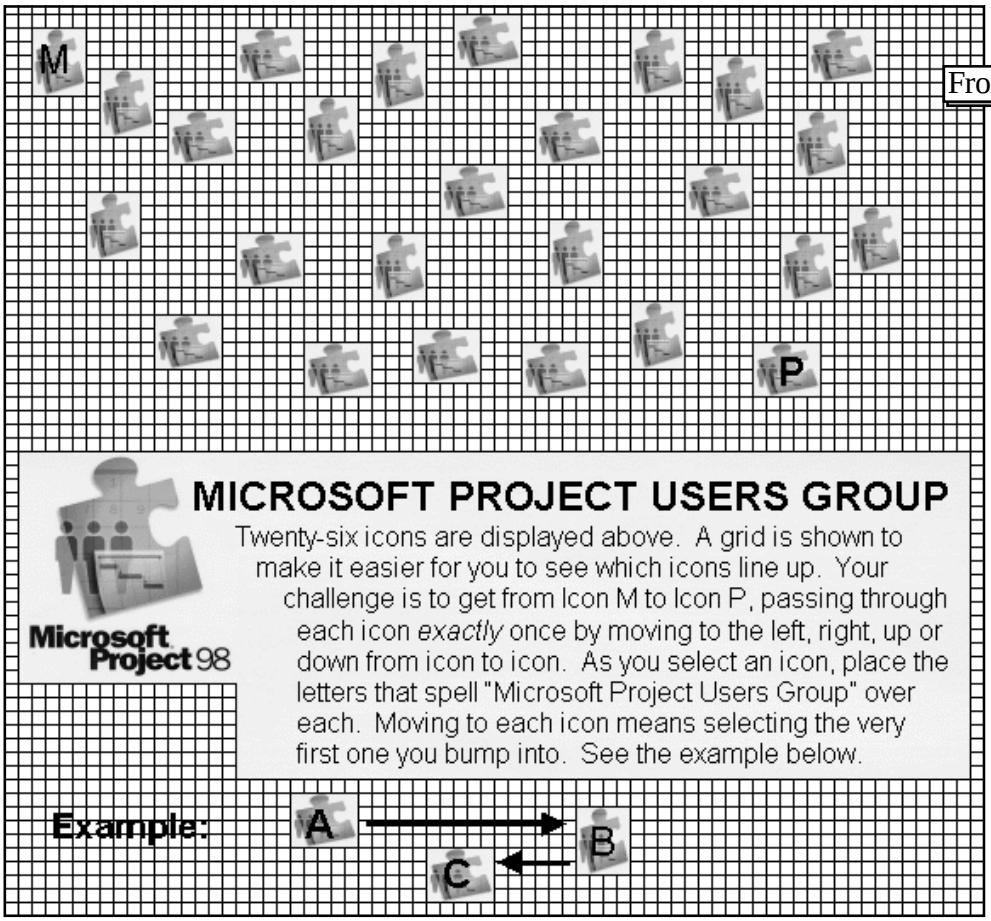
The Icon Connection?



Hint: Paths (arrows) can cross.

From the Editor

Be sure to check your answer on the Web.

515 Members Strong!!

Microsoft Project Users Group Office

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***The Project Network* Newsletter, Winter 1998**

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The Twenty First Century: How You Will Automatically Control the Schedule, Cost, and Status of Dozens of Projects

By John Rakos, John J. Rakos & Associates Consultants Ltd.

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In the 21st century, project managers will have to manage dozens of projects with very few resources. They will have to control schedule, cost, resources, and interdependencies by exception: report progress if it is going well; give a clear warning if something is going astray. This paper discusses how Microsoft Project (with some simple enhancements) can be used to accomplish all of this.

Introduction

The system was developed for a large telecommunications and informatics services group in one of the departments of the Canadian Federal Government. This group has over 100 systems projects being developed for dozens of internal clients. The projects range from small, 3-6 month efforts, to major Crown projects involving hundreds of millions of dollars, produced internally as well as by outside contractors. Most of the projects are small enough to be stand-alone, but some of the larger projects, called programs, consist of several smaller components, called projects. These component projects have many interdependencies that have to be accounted for in a consolidated schedule.

Upper levels of management as well as all the project stakeholders need to know the schedule progress of all these projects: Have major milestones been met? Are future milestones rescheduled? When will the project be finished? Financial control is also important: How much money has been spent? What are the projects' earned values? How much will be spent by fiscal year and quarter if necessary? Most important, management needs to know if the project needs special attention. They need a system that will quickly warn them about any issues that can cause the projects to go astray. They need to see a summary picture of all the projects, as well as be able to drill down to the detailed level. As you may imagine, it is very difficult to do all this for hundreds of projects.

What is Unique about this System

This paper will show how a system using Microsoft Project™ with a few custom macros was used to implement a simple planning and control system that solves many of these problems. The system is used both for project planning and control. At the planning stage the system helps to define and input a plan for all the group's projects. We found that 90% of the projects fit into one of five standard Word breakdown Structure templates. These templates contain major phases, milestones as well as tasks at detail level. Financial templates are also provided to ensure that fiscal planning is adequate. At the controlling stage, the system rolls all the projects up monthly across the network and summarizes them for reporting. The roll up handles cases where several 'sub' schedules comprise an integrated schedule, and even handles inter-project dependencies.

Once the roll-up is done, reports are printed that show schedule progress for each project, financial performance and highlight any problems. The project files even contain a status report for each project. The reports can be displayed at any outline level. Critical milestones and deliverables are identified and reports showing only these items can be produced. Most importantly, the reports flag any issues that need fast reaction from management.

The Results

Figure 1 shows one of the most useful outputs. This report is the first page of the summary of dozens of projects. This view is a double Gantt showing the progress of projects versus the baseline plan. Each detail line on the Gantt represents one project. Note that the Task Name

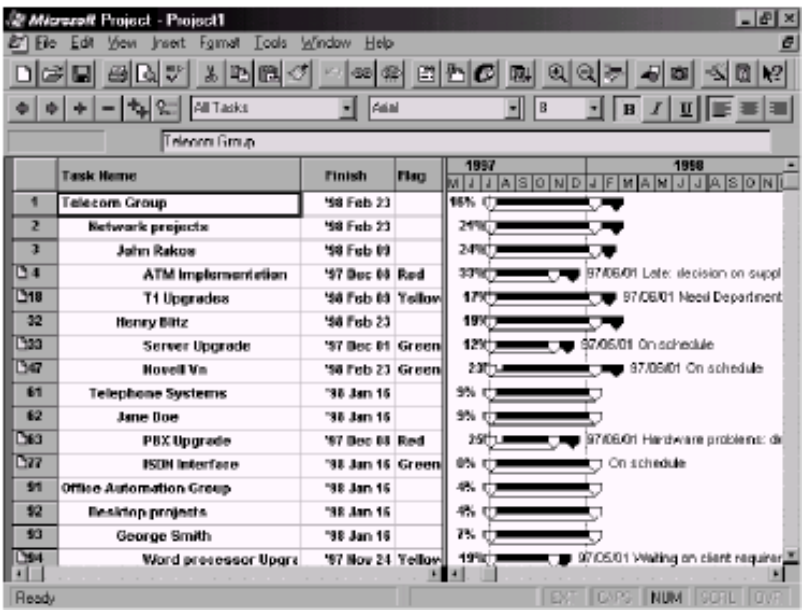

Figure 1.

column contains a meaningful hierarchy of how the projects are organized. Roll-up into this hierarchy was accomplished using a macro written in Visual Basic. The user simply creates a structure project file such as Figure 2. Note that the detail lines are simply

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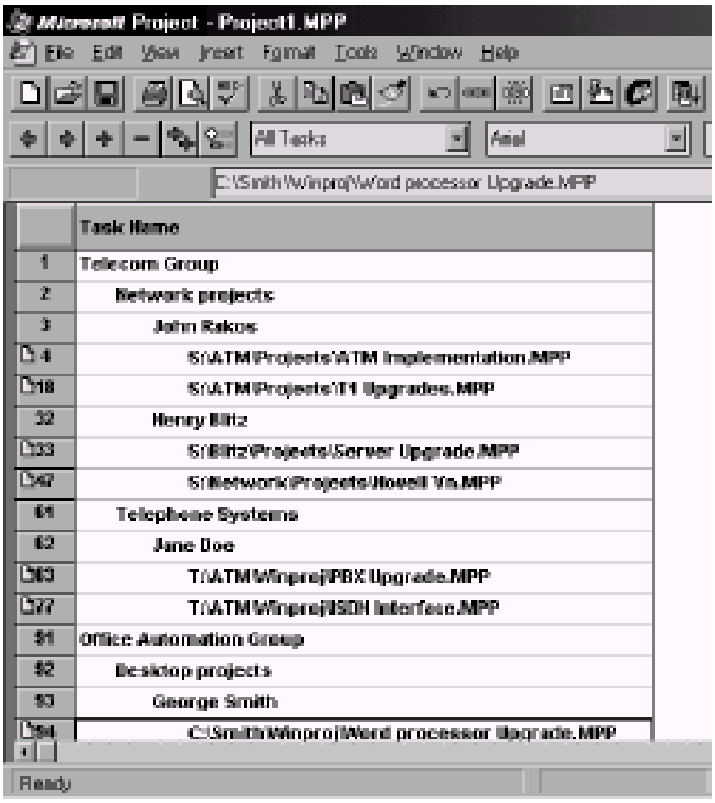

Figure 2.

(network) directory path names. The macro rolls up the referenced projects into the hierarchy.

We find that one of the most useful items is the 'flag' field. To highlight any issues that need attention, the flag is set to 'Red', 'Yellow' or 'Green'. If 'Red' appears in the field, the project needs immediate action from management. If 'Yellow', the project needs action soon from management. If 'Green', the project needs no action but there may be some issues that management needs to be aware of. Each project title bar is annotated with a phrase that summarizes the status of the project. For a project labeled 'Red' the text is the action item that management needs to take immediately. For a project labeled 'Yellow', the text is the action item that management needs to take soon. For a project labeled 'Green', there need not be text attached, but Project Managers may use it to apprise management of some issue.

Most of the project plans are simple: 10 to at most 50 line items per project. Usually the major phases, milestones and deliverables are sufficient. Since the projects are rolled up incompletely, the user can drill down to more detailed information simply using the outlining features of MSProject. Figure 3 shows such a drill down. This level of detail is usually not necessary for management reporting.

Financial Data

Figure 4 shows a view where financial data can be controlled. This financial 'spreadsheet' is incorporated right into MS Project, and is simply presented as a Table. This was accomplished using a macro written in Visual Basic. The macro basically adds 18 additional cost columns to the existing MSProject provided ones. The macro also allows basic arithmetic operations among the columns so that totals, variances and other data can be calculated and displayed. The data for the summary tasks is the sum of the detail ones, so that total group and individual budgets are automatically calculated.

Project Update

Monthly, each Project Manager updates his or her project file with actual data for past tasks, and any revisions for future tasks. To show financial performance, actual dollars spent and estimated forecast dollars are entered into the appropriate columns. If there are any problems with the project, the issues are detailed in the Notes field of the appropriate task. (See Status Reporting below). Once per month, each project is rolled up from the disk file

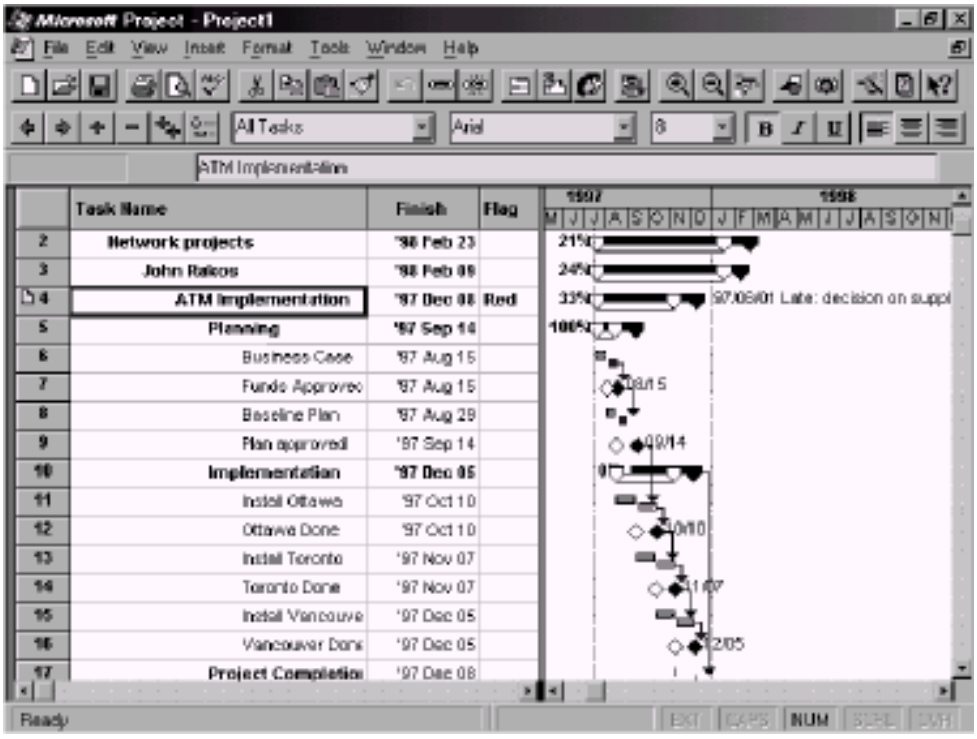

Figure 3.

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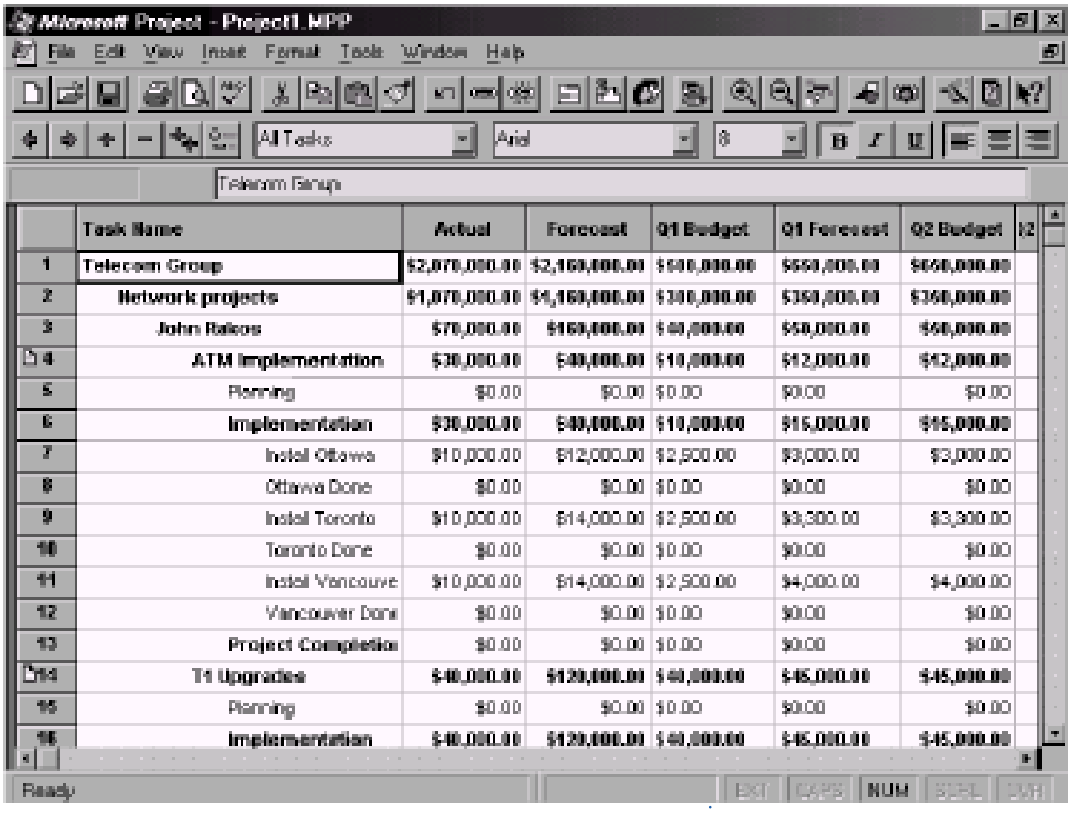

Figure 4.

of the appropriate Project Manager, who may be anywhere on the network. The reports go to several levels of management. These managers need to be aware of any problems and react using the usual project management methods.

Status Reporting

The software tool allows a long text field to be attached to each line item. This is called the 'Notes' field. The software also allows the first line of the Notes field to be displayed as annotations on the Gantt chart. The Notes for the project title line is used as a concise status report (Figure 5). The Notes of any item may contain any detailed information that the Project Manager wishes to impart to the manager, (or whoever is displaying the field). The Notes of the project title line can be used for a summary of the problem and a date. This line will be displayed on the Gantt.

As seen in Figure 5, the Notes item can be used as a historical journal of the issues associated with the project. As the issues get resolved, a solution statement and date can be added at the top of problem list, thus keeping a chronological list of the issues and resolutions.

If read-write access is allowed to the project file, the Notes can be used as a groupware documentation interchange. Anyone who has write access to the file can insert a reply or comment into the Notes. These changes must be explicitly stored back on the originators file.

Hard Copy Reporting

Everyone is encouraged to look at the roll-up on-line. Since the roll-ups are dynamic, the latest information will be displayed. However, at times printed reports are necessary as well. Figure 1, when printed, is a useful report to see progress on all the projects because baseline versus actuals are shown. Different levels of breakdown are reported to different levels of management. Top level

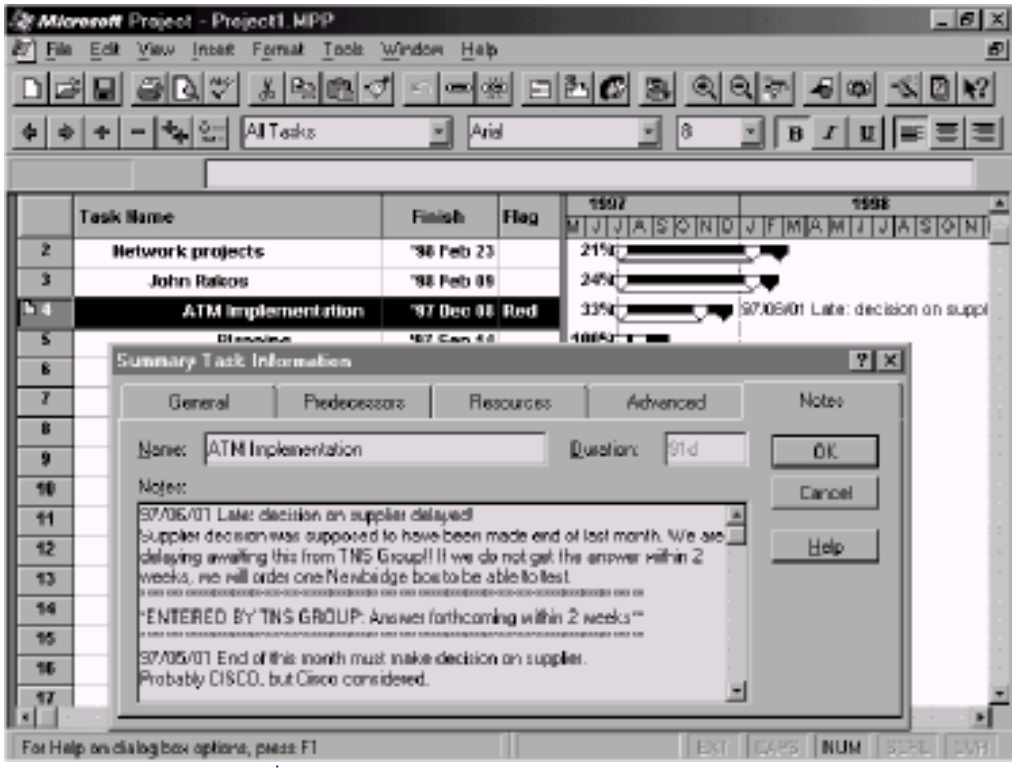

Figure 5.

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management may receive only one line per project. The next level receives major phases, possibly meaningful milestones. The next may receive deliverables and so forth. Figure 4 (printed), shows another common report used by management for financial control.

The full suite of the usual reports built into the normal software can be produced. Macros have been written so that anycustom view or report can be produced by clicking on a single menu item or toolbar icon.

Inter Project Dependencies

In many cases a predecessor task is in one project while the successor task is in a separate project file. MSProject allows Dynamic Data Exchange links, but this is dangerous because the predecessor project can automatically update the successor one. *Only the PM may update his or her project*. We added another level of control using Visual Basic macros.

Figures 6 and 7 show two project plans. Figure 6 is the Predecessor Project containing the predecessor task *Do Design*. For clarity it contains a milestone *Design Approved*. This milestone is the predecessor to Successor Project *Do Construction* (Figure 7). We repeated the *Design Approved* milestone in the successor project only to warn the PM that the project has an external dependency, and set special codes to link the *Design Approved* milestone in the predecessor project to the *Design Approved* milestone in the successor project. The files are rolled up (using a macro), then another macro is run to find the interdependencies and establish the links.

Figure 8 shows the results of the macro. The projects are rolled together and the predecessor and successor items are linked.

Problem Determination

Several custom searches or 'filters' are used to help anyone pinpoint any issues that may require attention. A 'Search by Flag' filter can be used to show only projects flagged as 'Red' (or 'Yellow' or 'Green'). The user can quickly see these projects, drill down to the issue causing the problem and assess the indicated action request. He or she may react using other available tools (for example, e-mail or an actual phone call), and perhaps respond to the originator in the Notes field of the issue.

Similar filters can be used to see issues associated with specific Clients, Projects, Areas, Project Managers and even list those items that are dependent on tasks in another project plan.

Conclusions

The system has worked out very well—mainly because management indicated from the start that they wish to see the project roll-ups monthly. Those managers that are using it find that it is giving them the exact information that they require to keep abreast of the projects in their area. The system has also been well received by the participants. It adds very little extra work: about 30 minutes per project per reporting period. The client is considering implementing it for the rest of the department.

For further information please phone or fax the author at (613) 727-1626 or mail to John J. Rakos & Associates Consultants Ltd., 14 Palsen St., Ottawa, ON, K2G2V8.

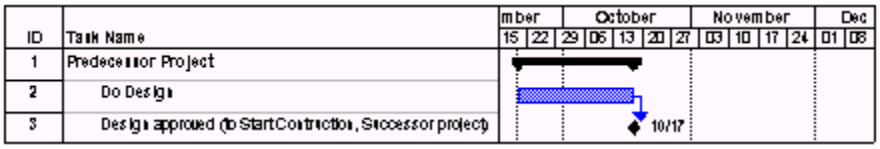

Figure 6.

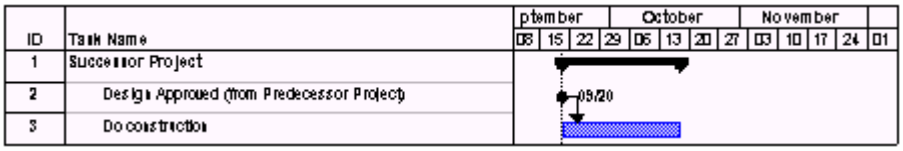

Figure 7.

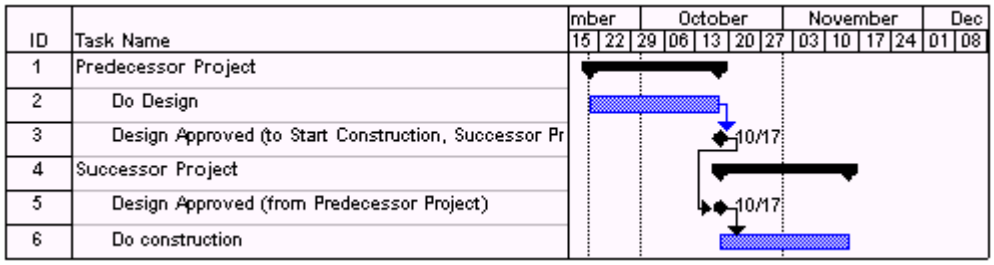

Figure 8.

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