The Project Network

Mpug GLOBAL
Linking Microsoft® Project Users Worldwide

The Newsletter of the Microsoft Project Users Group–Global

Volume 6, Issue 3–2002

Microsoft Gives MS Project Users a Jump Start

With the release of Microsoft Project 2002 Professional and Project Server, the product suite is now recognized as a true, enterprise-wide project management solution. In order to facilitate what is a more complex installation than earlier versions of Project, Microsoft has designed a kit to preempt any issues that may arise from implementing MS Project 2002. Specifically, the Microsoft Enterprise Project Management (EPM) Starter Kit was designed to get Microsoft customers quickly set-up to experience the many advantages of the new Microsoft EPM Solution.

The EPM Starter Kit has been created to guide prospective MS Project 2002 users through the whole installation process. By purchasing the Kit, the customer receives fully-functional software and expert guidance through the installation process (one of the hardest aspects of MS Project 2002 to tackle) via telephone support.

Melanie Cosklo, Lead Marketing Manager-Productivity Applications, Microsoft Corporation explains, "The MS Project team is committed to ensuring our customers have a positive experience with MS Project 2002. The EPM Starter Kit offers our customers a head start by providing all the necessary software and support needed to properly install and configure this complex software."

The EPM Starter Kit provides the software products, reference materials and support needed for installing the technology components of the enterprise project management solution. In addition to Microsoft products, it also includes four hours of implementation, set-up and project management expertise, provided by MPUG-Global co-sponsor and founder, and Enterprise Project Partner, Pcubed. Microsoft customers will be guided through the installation and configuration process as well as have tool capability questions answered. Along with the four hours of support, the EPM Starter Kit includes 120-days of fully functional, non-trail code for each of the following products:

- Microsoft Project Professional 2002
- Microsoft Project Server 2002
  - Includes Microsoft SharePoint™ Team Services
  - Plus 25 Client Access Licenses Microsoft Project Server 2002
- Microsoft SQL Server™
  - Plus 25 Client Access Licenses Microsoft SQL Server

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The Project Network Newsletter
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The MPUG-Global Mission

The mission of MPUG-Global is to provide the installed user base of Microsoft® Project with a forum to exchange ideas, support, and experience in order to improve understanding and utilization of all Microsoft Project related products. MPUG-Global is an independent users group formed with the support and recognition of Microsoft. We will actively seek out related organizations worldwide and collaborate with them to encourage the appropriate exchange of information to MPUG-Global membership for all levels of Microsoft Project experience.

From the Editor

Liz Curwen

It has become tradition that without fail I buy my father a jigsaw puzzle for Christmas every year. When considering which jigsaw puzzle to buy, I tend to concentrate on its complexity, the more complex the better! However difficult the puzzle, my father seems to put all his energy into the jigsaw and manages to complete it. It may take a little longer than planned, but that's due to his stubborn nature – he won't let anyone else put a piece in place without his say so! However, persistence pays off and by the end of the festive season, the dining table is monopolised by the finished masterpiece for all to see.

We as project managers, can view MS Project as a jigsaw puzzle, with many features that fit together to make one complete solution. Certainly MS Project 2002, with its various components can be viewed as a mass of pieces that all need to be linked together. As discussed in the lead article, these pieces cannot simply be plucked from the box and assembled; fitting all the components together takes time, and even the most stubborn project managers need assistance! The EPM Starter Kit provides that boxed up solution, supplying all the pieces, a picture of how the end result should look and even additional support – someone to look over your shoulder and say "this one goes here!" to build that picture with you, and help bring everything into focus.

Whilst it is great to have all the pieces of the product at your fingertips, the onus is on the customer to assemble it in the right way. In his column, Brian Kennemer emphasises the need to read the instructions studiously prior to implementing the tool. We can all relate to opening a box and trying to assemble a new gadget, deliberately tossing the directions aside! I think you would agree that in this situation more often than not, the new toy won't work, and you find yourself digging through the clutter in desperate search of those instructions. When it comes to implementing MS Project 2002, save yourself the headache. This new product is not a toy and you will need patience in following the step-by-step process, an approach that project managers should (in theory) warmly embrace.

So you have the tool, the kit and the instructions, but there is one piece missing. It's not available with the boxed solution, but Microsoft highly recommends that MS Project customers utilise its services. You've guessed it...MPUG-Global. Microsoft recognises MPUG-Global as the official community supporting Microsoft Project. Chris Capossela, General Manager, Microsoft Project

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From the Editor

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Business Unit attests that Microsoft "recommends MPUG as a vital resource to any level of the Microsoft Project user seeking a community of peers to enhance their experience with this tool."

This has been an incredible year for MPUG-Global. With the launch of Microsoft's first Enterprise Project Management Solution, the MPUG community is more vital and pertinent than ever. As such, we have been able to gain more support for the community and this will translate into more benefits to our members. Recognised as an essential part of the MS Project user experience, MPUG-Global is a key piece to ensure your picture is complete. Renew your membership today. The box below will tell you how to get all your pieces in place for the coming year... ◀

Best regards,

Liz Curwen
Editor
The Project Network
lcurwen@mpug.org

STAY AHEAD OF THE CURVE
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COMMUNITY

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Renew your MPUG-Global membership by **29th November 2002** and you will have a great chance to win a **FREE** copy of Microsoft Project Professional and Project Server. For more information, please visit the MPUG-Global web site (www.mpug.org).

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Microsoft Jump Start

(continued from page one)

- Microsoft Windows® 2000 Advanced Server
  - Plus 25 Client Access Licenses Windows 2000 Advanced Server
- Microsoft Windows 2000 Server
  - Plus 25 Client Access Licenses Windows 2000 Server

After customers have implemented the EPM Starter Kit, they can take full advantage of the Enterprise Project Management Solution! But consider another Microsoft-endorsed offering—the Microsoft Enterprise Project Management Jumpstart program. This is designed to give an organization a working model of the business benefits of Microsoft Project Server 2002 and Microsoft Project Professional 2002. It allows customers to test drive this solution over a five-day consulting engagement, just as companies would in a full-scale pilot program.

Dan Carroll, Manager of Field Support Operations, Pcubed, emphasizes the importance of the Starter Kit and the Jumpstart program in the evaluation of MS Project 2002. "The goal of the Microsoft Enterprise Project Management (EPM) Starter Kit and the Jumpstart program is to facilitate the evaluation of the EPM solution. The Starter Kit is an ideal way to efficiently install and configure the software. Then with the Jumpstart program, the customer can quickly see how the EPM solution solves their business problems. By incorporating the customer's data, processes and requirements into the Jumpstart deliverables, we offer the customer not only a real world representation of their EPM solution but also the pathway to a successful enterprise-wide implementation."

As an MS Project user considering migration to MS Project 2002 and true enterprise-wide functionality, the EPM Starter Kit may just be the answer you are looking for. For those who go on to use the Jumpstart program, you will be able to experience some of the great new features of the Enterprise Project Management Solution first hand. Whether you simply invest in the EPM Starter Kit or chose to sign up for the Jumpstart Program as well, you will discover all the advantages of the EPM solution—opening the door to a world of new business opportunities.

To find out more about the EPM Starter Kit and the Jumpstart Program please visit: https://microsoft.order-2.com/projstarterkit/ For those outside the US, please contact your local Microsoft Office for similar offerings. ◀

Microsoft Project

It's all about the installation instructions

Before you install the Project Server, read the install documents instructions on the CD. When you are done, read them again. Many of the issues that I have seen featured in the Microsoft Project newsgroups are caused by people NOT doing something that is specifically called for in the install documents instructions.

Here is the short list of actions to look out for:

1. Run the COMPlus tool to setup the accounts that Project Server will use to access the OLAP features in Portfolio Analyzer and the Sharepoint Team Services features. If you do not run this you will not be able to build the OLAP Cube, or add a connection to an STS server. Note: the user you enter for the OLAP part of the COMPlus tool should be a member of the SQL Server machine OLAP Administrators group.

2. After you have built the OLAP Cube, you need to allow users to access it. The install document has instructions on how to do this, which are commonly overlooked. If you do not add a "role" to the OLAP Cube (in Project Web Access, then "Admin", then "Manage Security", give the categories access to the required views), then no users will be able to access the Portfolio Analyzer views.

Brian Kennemer is an MS Project MVP and Project Specialist for QuantumPM. Along with penning this column, Brian is also one of the lead organizers for the prospective Puget Sound Chapter.

Ask Brian covers topics appearing in the Microsoft Project Support Newsgroup, where people with questions about MS Project can interact and seek solutions. Members can find this newsgroup and many more in the Members Only Section, www.mpug.org/members.asp

3. Running the proxycfg tool. This is one where the install doc is a little confusing. The instructions seem to say that you only have to run this tool if your organization uses a proxy server for Internet access. Even if you do not use a proxy server, you MUST run this tool. This tool configures IIS to properly handle XMLHTTP protocol requests. If this tool is not run, the Sharepoint Team Services will not work properly, and you will not be able to add an STS Server. Here is an example of how your proxycfg command line should look if you do not use a proxy server for Internet access:

   proxycfg -d -p "fakeproxy" "<local>"

Continued on page five

First Book on PSA:Professional Services Automation
Optimizing Project and Service Oriented Organization

Published by John Wiley & Sons, Inc, this is the first and most comprehensive textbook in the history of Professional Services Automation (PSA). Six years in the making, it provides an unbiased view of PSA through the real life experiences of veteran project managers, IT experts and business executives. The extensive analysis using the PSA cycle for each component, return on investment (ROI) calculators, best practice functionality and PSA RFP template make this the PSA reference that no manager or executive in a project and service oriented organization should do without.

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Project Management is a critical component of any PSA solution.

Microsoft Project

To order or preview the book, visit:
www.psabook.com

Ask Brian

(continued from page four)

At the risk of repeating myself, it is very important to remember that Project Server is not just another desktop application; it is a serious piece of software. You cannot get away with skipping the install doc and the readme and expect it to work. A good setup wizard cannot catch everything and Project Server's setup is no different. Do yourself a big favor, save yourself a lot of troubleshooting and read the documents before you install. They can be found in the Docs folder on the Project Server CD. The main document to look at is called PJSVR10.CHM. This contains the information outlined above in more detail.

Baselines, Old and New

If you use, or used to use Project 98 or Project 2000, you know that once you save a Baseline, it is hard to add or change a task and have that change reflected in the baselines of the summary tasks 'above' that new or changed task. This is because baselines do not 'rollup' like other fields. The baseline for a summary task is not really the sum of the child task baseline values; rather it is a copy of the value of that field for the summary task that is 'frozen' regardless of what gets added or changed. Remember though, if you upgrade, or have upgraded to Project 2002 (Pro or Standard) you now have the option to rollup new or changed tasks when you resave the baseline for those tasks. The Save Baseline dialog now contains options for rolling baseline changes up the summary task structure. Just something to tuck away for when you need it...

A Small Joke (very small)

A Developer, a QA Tester and a Project Manager are taking a walk down the beach at lunch. They are talking about the sorry state of the project they are working on and trying to think of ways to fix the problems. As they are walking they find a lamp, they pick it up and a Genie pops out. The Genie says that he will grant one wish to each of the three. The Developer goes first, and wishes to be a millionaire living on a beach in Hawaii. Poof! He's gone. The QA Tester goes next, and also wishes to be a millionaire but wants to live in the south of France. Poof! He's gone. The Project Manager thinks about his project for a moment and says to the Genie: "My wish is to have both of them back after lunch!"

This small joke (very small) is a telling commentary on the sad lot of the Project Manager, who always needs things from people that they do not want to give! This is an important factor for all of us to remember as we deal with our projects. As much as we would like everyone involved to eat and sleep the project the way we do, we need to keep in mind that for some people there is life outside the Gantt chart, and as chaotic and unscheduled as life might be, they seem to enjoy it! ◀

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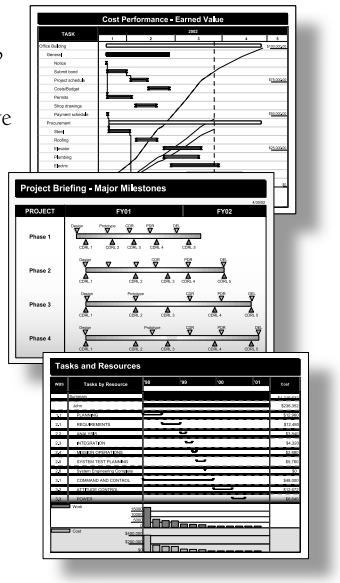

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Planning Standards for All Your Projects

By Colin Stewart, Pcubed Inc. (Member, South East England Chapter)

My organisation is often brought in when a project has lost the confidence of its sponsors. Specifically we are engaged in any combination of the following roles:

- We are the programme or project managers
- We have a multi-disciplinary team producing multiple plans that all have to be integrated to show a critical path, as well as forecasts on timing and budget
- We don't have the advantages of a client with an enterprise planning approach or toolset
- We have a very short timescale in which to assess the plans for completeness and document preliminary findings to the sponsor
- We are completely new to the project or company

Whatever the situation, the key question that we have to answer is: "how do we know our client's plans are technically robust, and that we can produce accurate status reports based on them?"

To help us understand the issues we face in constructing accurate plans, we have developed a simple set of standards by which we can judge the relative integrity of the plans. Note: questions such as 'believability' (whether the timings shown are realistic) or completeness (whether all necessary tasks are shown), are not needed to judge the integrity of the plans.

Since our neck is on the line to report accurate project status, it is essential that we create standards that can be applied to all plans. Any exceptions need to be fully understood and approved.

The planning standards that I usually follow are outlined in the table below.

PLANNING STANDARD	WHY?
All plans should be created in Microsoft Project.	Don't use Word, Visio, Excel or PowerPoint. Rescheduling and planning using these tools tends to be a 'do it and forget it' exercise.
All tasks need to have values in duration and work fields.	This will ensure a more reliable reflection of project timing is shown.
Tasks need to be coded.	Using text fields to show a project area, lifecycle phase, owner (as opposed to resource) etc. will help you identify who to discuss issues with, as well as allowing you to filter the plan.
All resources need to have an hourly rate.	This helps to perform EVA (Earned Value Analysis) as well as providing the client with a fast way to view project budget and spend.
Resource constraints (holidays etc.) need to be maintained in calendars.	This is obvious really; if the only person who can use that obscure legacy system is away for the whole of August and the launch is in September, there may be a problem.
All tasks need to be assigned a named resource.	Resource levelling will work better, and you can identify who is doing what task more precisely.
Do not assign a resource to summary tasks.	Assigning a resource to summary tasks messes up resource and cost calculations. Don't do it!
Do not put constraints on tasks (apart from 'Gets' where no other plan is involved).	Constraints on tasks are often not justified. They are often assigned due to an assumption rather than being based on knowledge of when that task can be delivered, according to its dependencies.
All tasks need to have a dependency chain leading to standard milestones (apart from last task).	The best way to report across plans is to have some common milestones. Common milestones allow you to make comparative analysis.
All tasks should have predecessors (apart from the first task).	It's simple, if there is no predecessor, you cannot calculate critical path.
No tasks should be less than half a day in length.	There is too much detail to manage when you assign tasks that are one or two hours long. However, there can be exceptions to this rule: for example, if you are planning a cutover from one system to another over a 48-hour period.

Planning Standards

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No task should be longer than the status cycle.	If a task is longer than the status period, you will go through two cycles before you find out there is an issue. This could cause major problems for dependencies.
Make sure all tasks are fixed units and effort driven.	This will ensure that the duration is calculated from the resource and their efforts, which is more accurate than guessing duration.
All tasks should be 'verb - noun' in naming structure.	Using this naming structure makes the plan easier to read. Consider the example of a task named 'Specification document'. This could mean review, create or test. In short a task should indicate an action and say to 'do something'.
Milestone descriptions must be in the format of noun + verb in past tense.	Like the task naming rule, it is better to say 'specification approved' or 'something completed'.
Mandated milestones will be zero duration.	Make sure milestones look like milestones so that they are easily identifiable.
Summary bars must not have predecessors or successors.	Summary bars are not tasks, and treating them as such can mean that tasks are scheduled later than they need to be because the summary task is shifted out. It could also mean that someone works on a task before all the predecessor tasks are completed.

Although all the planning standards above don't work on their own to control a project, they do help us understand the level of planning maturity that exists within the planning areas. This may appear to be a long list, but it's pretty easy to create the filters, tables and views that give you this information fast. And the next time you're asked if the plans are robust, you know the answer. ◀

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Tommy's Tips

Automatically Updating the Start Dates of Unstarted Tasks While Not Affecting Finish Dates of Tasks in Progress

The Situation

My client has been complaining lately: "My schedule has several thousand lines. Using my *Task Usage View*, I update my *In-Progress Tasks* on a task-by-task basis, entering *Actual Work* on the day performed. However, I have had problems with the *Tools Tracking Update Project* feature, so I have started to manually reschedule my *Unstarted Tasks* separately."

"But what are the problems?" I asked

"I tried the *Tool Tracking Update Project* feature as I needed to reschedule my *Unstarted Tasks* automatically," he replied. "The feature rescheduled the *Finish Dates* of my *In-Progress Tasks*, and all of the tasks linked to them, to some unusually remote dates. It wasn't until later that I noticed that I have unwanted *Split Tasks* that rescheduled unfinished work out several weeks. My project *End Date* was pushed out past the deadline, and now, I have to change all of the *Finish Dates* back to what they were before I used the *Update* feature! I don't have some of that information and now my schedule is incorrect!"

The Fix

Develop a logical sequence using the standard features of Microsoft Project 2000 that will move out *Unstarted Tasks* only, leaving the *In-Progress Tasks* unchanged, then record that sequence as a macro.

The standard features of Microsoft Project 2000 can be programmed to perform in logical sequences, much like code, that will produce desired results. Those logical sequences can be recorded as procedures using the *Record Macro* feature; these are easily modifiable and can be used over and over again. Developing sequences can be time-consuming and confusing, but if you do a little digging into how a standard feature works, you will discover new ways to work smarter with Microsoft Project 2000.

For example, how many times have you manually moved out a *Finish Date* on your *Entry Gantt View* only to find the Work Hours have dramatically increased? Do some digging and you will find that Microsoft Project 2000 will calculate *Durations* based on *Task Type*, whether or not there are resources assigned, honoring the constraints imposed by *Predecessors*, schedule logic, etc.

Addressing my client's situation, I began by creating my own custom filter for *Unstarted Tasks by %Work Complete* and *%Complete*. I created this custom filter so that my client could use *%Work Complete* as a record-keeper of approximate work progress on *Fixed Duration Tasks* that have no resources assigned. My client didn't want to use a *Text Column* and they preferred not to use *%Complete* because it's sometimes stubborn and does not calculate what they want to see. A standard filter in Microsoft Project 2000 for *Unstarted Tasks* won't work because it filters by the acronym "NA" in the *Actual Start* column.

It took a few tries to get the right sequence shown in the final recorded macro below. Below, you will see the logical sequence of standard features I used to produce the desired result (well logical to me!). I changed the "UpdateDate" to "Now()". The first two commands clear all filters and show all the outline levels so no tasks will be missed. Oh yes, and one more thing before you start, filters only work on data that's not rolled up in the *Summaries*. Had to do some digging on that one, too!

```
Sub PushEmOut()
' Macro PushEmOut - Removes ALL filters, opens all
' outline levels, Filters for tasks with 0% WC and 0% DC, hides summaries,
' selects the whole sheet, reschedules start dates to today or later, depending on dependencies.
' unhides summaries, removes all filters, shows Outline Level 2, selects Row 1 of the Name Column
' Macro Recorded Wed 7/10/02 by Tommy Lovelace
    FilterApply Name:="All Tasks"
    OutlineShowTasks OutlineNumber:=pjTaskOutlineShowLevelMax
    FilterApply Name:="0% WC and DC"
    SummaryTasksShow 'Actually HIDES the Summaries
    SelectSheet
    UpdateProject All:=False, UpdateDate:=Now(), Action:=2
    SummaryTasksShow 'SHOWS the Summaries
    FilterApply Name:="All Tasks"
    OutlineShowTasks OutlineNumber:=pjTaskOutlineShowLevel2
    SelectTaskField Row:=1, Column:="Name", rowRelative:=False
End Sub
```

Schedule ON!.....and DIG DEEP!

Tommy's Tips is presented by Westney Project Services (www.westney.com) to promote the applications of Microsoft Project and provide a few real life applications that "aren't in the books".

Tommy Lovelace is a Senior Consultant with Westney, and the President of the Houston Chapter of MPUG-Global.

Understand the Past (or be Doomed to Repeat it)

By Brian Leach, Drivermill/Steelray.com (Member, Atlanta Chapter)

"Our project was running about three weeks behind schedule, but I straightened things out," bragged my colleague Leo.

"So how did you accomplish this latest achievement?" I asked with a wry smile on my face. Leo knows his way around Microsoft Project; feature for feature, I've met few people as proficient as he. However, while his strengths lie in MS Project he is not so proficient in the world of project management. Leo's solution to a late project is to use threats. He commented that getting the project back on track was simple: "I threatened to cancel vacations and reminded them that performance reviews were around the corner." Of course with these threats he got the project back on track, but did this mean that everything would now run smoothly?

I was aware that Leo wasn't asking any fundamental questions about why the project had fallen behind schedule. He wasn't interested in the reasons why, just that the project was off track. When I asked to see Leo's Gantt Chart, it showed that the project was right on schedule. In fact, there was no evidence that there had ever been any problems. All tasks started on their planned date and finished on their finish date. I wanted to look at the root causes behind why Leo's schedule was falling behind and whether he could avoid bad people management – i.e. threatening to cancel vacations – and still get the projects he worked on back on track. I also wanted to look at how future tasks, as yet not outlined on this particular project plan, would be affected by the "catching up" technique used by Leo.

First, I looked at four tasks that had fallen behind schedule and contacted each resource assigned to the task. The first team member simply underestimated the task, which Leo confirmed as typical. The team member also said that he would be late on his next deliverable. I explained that by recording a baseline schedule, which captures actual durations and dates, one could analyze finished projects and identify those resources who need more guidance on task estimation. Two actions arose from this task:

1. Review that specific resource's remaining estimates and adjust them as necessary.
2. Update the schedule (now that the next task would be late) based on reality.

The second team member had misunderstood the requirements of the task, and according to Leo, the requirements document had not been kept up-to-date. The second resource also indicated that he didn't have any deliverables for another month and he expected there would be no problem meeting that deadline. Two actions arose from this task:

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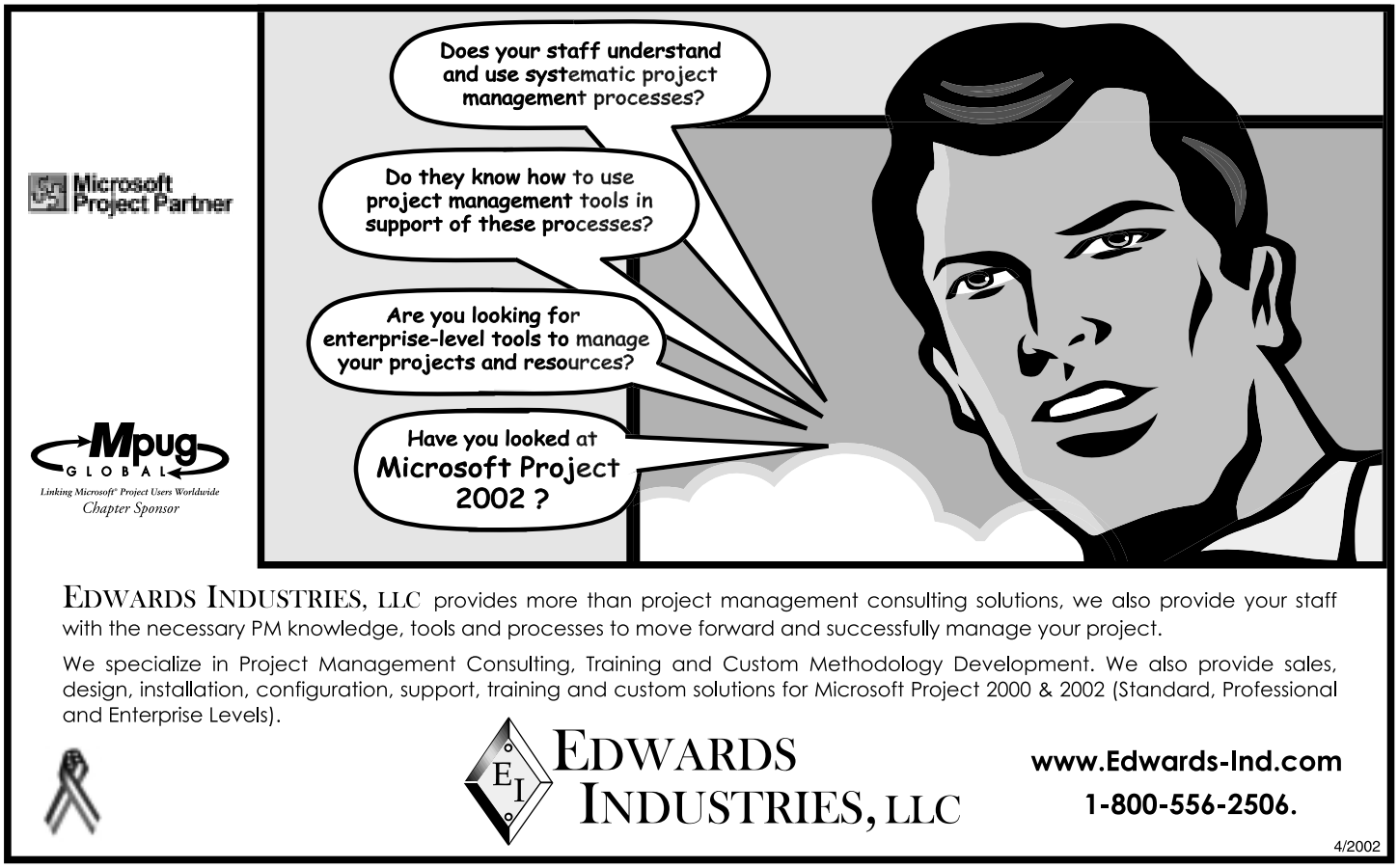

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4/2002

Understand the Past

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1. Make sure that the resource understands the requirements before beginning the assigned task.
2. Add a new task to the schedule to update the requirements document and schedule it as a recurring task.

The third team member admitted that her delay was caused by other tasks that Leo, as a manager, didn't even know about. The third team member indicated that she would miss her next deadline due to the additional work that was not scheduled in Leo's Project plans. There were two actions that arose from this meeting:
1. Communicate to the team that the approval for work on additional tasks needs to come from a manager.
2. Update the schedule to be based on reality.

The fourth team member was hard to reach. Leo explained that he liked to work from home as he was often assigned tasks that took several weeks to complete, and felt more productive at home. I suggested to Leo that by the time he had realized that his fourth resource was late on delivery, it would be too late to do anything about it. Two action items came out of this meeting:
1. Break tasks into smaller, more deliverable pieces.
2. Managers need to communicate more frequently with the team.

By meeting with these four resources, we learned a lot about past, present and future tasks and how they would affect individual projects. Leo was able to respond to the newfound information and avoid some potential future problems.

Taking a look at the tasks within a project plan had transformed the way that Leo looks at his own projects. Leo realized that even though he was getting one project completed on time, the tasks were still having a negative impact on future projects. He now understands that when a task slips, the following questions needed to be asked:

* Why did the task slip?
* What was the root cause?
* Are there steps I can take to prevent the same thing from happening in the future?
* What is the impact of the slip, and what's the best course of action that should be taken?
* Are there ways I could have easily detected the slippage sooner?

I reminded Leo of a thought of one philosopher, George Santayana: "Those who do not remember the past are doomed to repeat it." I think Leo will be looking at his projects closely from now on, and instead of using bullying tactics to ensure his projects are on time, careful communication and following the tasks outlined above will ensure the success of the project. ◄

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Tracking Administrative Work and Expense Costs

By James Nuthall, Brentford Technologies Inc. (President, San Francisco Bay Area Chapter)

As project managers, we are sometimes responsible for providing both projected budget and actual costs relating to a specific project. These can include administrative costs such as weekly project meetings, monthly steering committee meetings and weekly travel expenses, and can relate to each team member separately. In order to set up and track the costs associated with these tasks we need to create a task for each type of event, per occurrence (weekly/bi-weekly/monthly) for each team member affected. To set all of this up could be viewed as a daunting effort. Fortunately, Microsoft Project provides us with a simple and easy way to set up these tasks through the use of the *Recurring Task* feature.

Planning

In order to ensure that you can track both the projected budget and the actual costs associated with your project, you need to make sure that everything is set up correctly as you complete your project plan. You need to create placeholders in your schedule allowing you to track these tasks but do not distract from the main tasks associated with your schedule. To do this, create a separate phase at the end of the project schedule called *Administrative Phase.* In the example below you are going to set up two indirect costs you would need to track, one for Project Meetings and one for Expenses. From the main menu, select *Insert/Recurring Tasks*. To measure the costs associated with both Project Meetings and Expenses you will need to create two different recurring tasks:

1) To set up and track actuals for all the Project Meetings that have taken place over the course of the project, you need to adjust the *Duration* to the time of a typical Project Meeting. Select the Recurrence pattern that best represents your project. In this case, we have selected weekly, on Mondays. Microsoft Project will automatically calculate the beginning and end of the project plan and set up the *Start* and *End by* dates. If you would prefer to do this manually, you can check the *End after* option, and enter the number of *occurrences* you need. Click *OK*. **See Figure 1**.

2) To track the Expenses, simply repeat the above procedure but adjust the *Duration* to zero. By selecting zero, milestones will be created which we do not want. However, to ensure that the whole process works we need to do this. The milestones will be adjusted later. Click *OK*. **See Figure 2**.

Once you have set up these *Recurring Activities* they can be identified by a ↻ in the indicator column. Tasks that have the same name as the activity are distinguishable by their suffixes (1, 2, 3, etc.). During the project we had four Project Meetings and Expenses tasks, as shown in **Figure 3**. The *Cost* (i.e., budget) and *Actual Cost* (i.e., final cost)

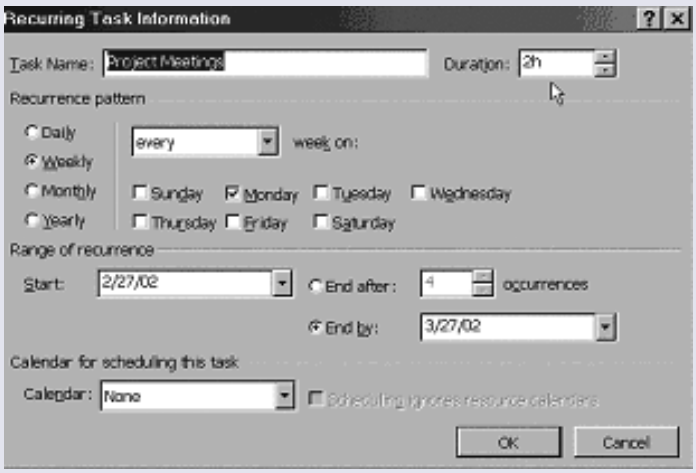


Figure 1

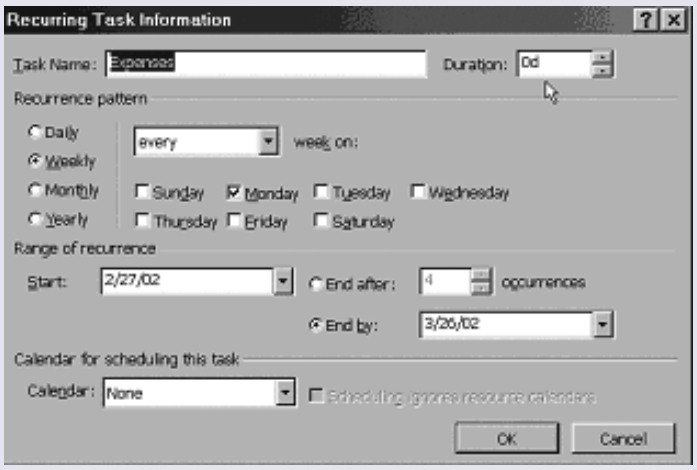
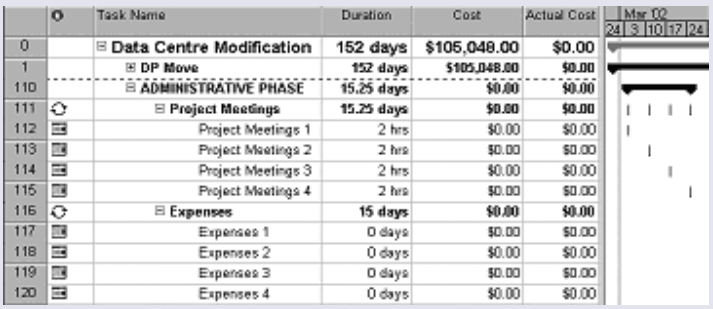


Figure 2



		Task Name	Duration	Cost	Actual Cost
0		Data Centre Modification	152 days	$105,048.00	$0.00
1		DP Move	152 days	$105,048.00	$0.00
110		ADMINISTRATIVE PHASE	15.25 days	$0.00	$0.00
111	↻	Project Meetings	15.25 days	$0.00	$0.00
112		Project Meetings 1	2 hrs	$0.00	$0.00
113		Project Meetings 2	2 hrs	$0.00	$0.00
114		Project Meetings 3	2 hrs	$0.00	$0.00
115		Project Meetings 4	2 hrs	$0.00	$0.00
116	↻	Expenses	15 days	$0.00	$0.00
117		Expenses 1	0 days	$0.00	$0.00
118		Expenses 2	0 days	$0.00	$0.00
119		Expenses 3	0 days	$0.00	$0.00
120		Expenses 4	0 days	$0.00	$0.00

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Figure 3

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Tracking Administrative Work and Expense Costs

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columns have been added so we can better track the changes we are going to make more clearly.

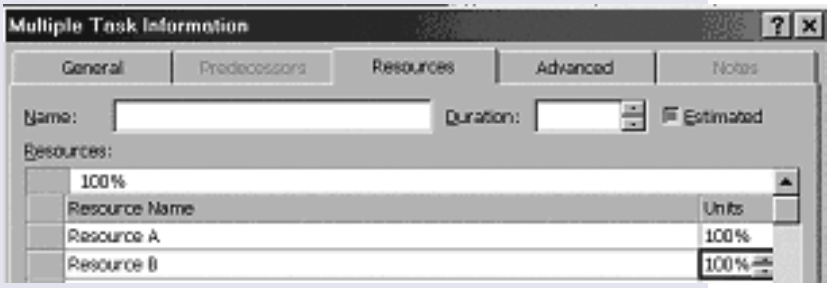

Figure 4

We now need to eliminate the milestones. Select all the Expense tasks and select the *Task Information* button on the Standard Toolbar. At the *Multiple Task Information* dialog box select the *Advanced* tab and uncheck the *Milestone* check box. Click *OK*. The Expense Tasks no longer have milestones attached.

To account for team members during a Project Meeting, we need to assign them to the individual tasks. We can do this on an individual basis or as a block using the *Multiple Task Information* dialog box **(see Figure 4)**. Set the resource units to 100% and click *OK* to apply. The *Resource Usage* view will now reflect that each team member has been present at the Project Meeting every week. This will help to record more accurately each team members' workload.

Figure 5

Figure 5 shows how many days and how much money weekly Project Meetings are costing the project. This information is now incorporated into any timesheets generated, and helps the project manager to assess where resources are being used outside of the specific project tasks.

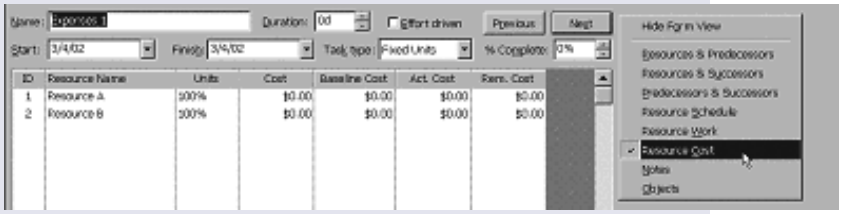

Figure 6

Now that the Project Meetings are incorporated into the project plan, the budgets for the expense tasks need to be set up. Assign each Expense task to each team member, just as you did with the Project Meetings above. Once the Expenses have been applied, budgets need to be assigned to each member for each week. The easiest way to do this is to use the Resource Cost form in the Gantt view. Select the first occurrence of Expense (1). From the main menu, split the Gantt view by clicking on *Windows*, and *Split*. Using the shortcut menu (right mouse click), click on the *Forms* section of the Gantt view and select the *Resource Cost* form **(see Figure 6)**.

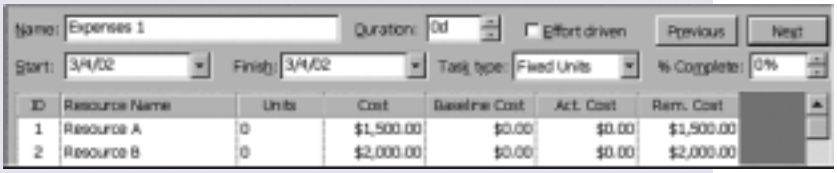

Figure 7

Enter the budgeted expense for each resource using the *Cost* field on the form. MS Project requires you to set the corresponding units for each resource to zero. Right now you don't have any of the actual costs so you need to keep

Continued on page thirteen

Tracking Administrative Work and Expense Costs

(continued from page twelve)

them blank **(see Figure 7)**. To apply the *Costs* and *Units*, click *OK*.

Repeat this process for each occurrence of the Expenses to complete the projected expense budget and see the total project costs **(see Figure 8)**.

Figure 8

Baseline

Once you have inputted and verified all the project plan details, it's a good idea to *Baseline* your project plan. This will help you identify variances between planned and actual costs that may occur during the project. From the Main Menu, select *Tools/Tracking/Save Baseline.* At the *Save Baseline* dialog box, check *Save Baseline* and check *Entire project* in the *For* box. Click *OK.* Now your schedule has been *Baselined.*

Tracking

Now you have set up the *Administrative Phase.* Once you start receiving weekly status information from your team members, you can start applying it to your schedule. You need to track the actual cost of both the Project Meetings and Expenses against those costs projected in the *Administrative Phase*. Using the Gantt *Resource Cost* form, enter the Actual Expense Cost (*Act.Cost*) information for each team member. Set *% Complete* to 100% **(see Figure 9)**. Click *OK*.

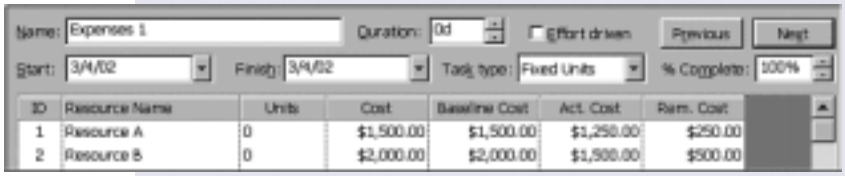

Figure 9

When entering Actual work for Project Meetings, use the Gantt *Resource Work* form. After entering Actual Work (*Act. Work*) for a team member, set any Remaining Work (*Rem. Work*) to zero. Notice how *% Complete* changes to 100% and *Work* will now equal *Act. Work* **(see Figure 10)**. Click *OK*.

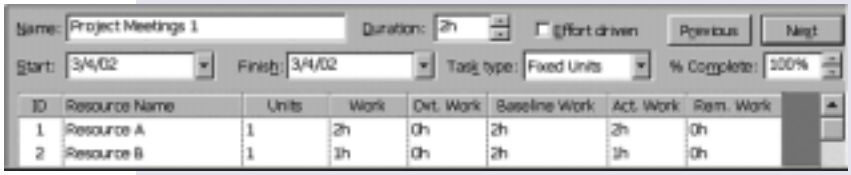

Figure 10

Having finished entering the project status information, you can now see how the project is performing against the Baseline. Use the *Cost table* to see *Baseline*, *Variance,* and *Actual Costs,* etc. **(see Figure 11)**.

Figure 11

By setting up an *Administrative Phase* we allow ourselves to track costs throughout the project. The actions listed above can be applied to any tasks that have costs attached. I hope that you found this useful. Happy planning and tracking of all those administrative activities! ◄

Project Partner Tech Briefing Invaluable for MPUG-Global

Now an official Microsoft Project Partner, MPUG-Global joins the ranks of the worldwide MS Project partner network established to provide customers with quality solutions, training and support. With the launch of its EPM solution, the Microsoft Project Team is committed more than ever to building a strong partner community to support customers.

This year in particular, the Project Team pulled out all the stops at its Annual Project Partner Tech Briefing in Redmond. MPUG-Global was among 200+ attendees who benefited from a 3-day conference of keynotes, technical and business tracks, and plenty of networking with fellow partners as well as the MS Project staff. MPUG-Global was also one of 20 "solutions exhibitors" at the event. The briefing was tremendously productive for MPUG-Global – from both the value of content as well as the exposure and networking. Not only did Microsoft continuously reinforce its support for the MPUG community, but Christine Buonocore, Executive Director for MPUG-Global commented she was swamped with enquiries from partners and has continued to build valuable relationships since. ◀

Project Partners gather new information at one of the key tech briefings.

(left to right) Zena Girdler, Microsoft, Christine Buonocore, MPUG-Global and Ken Lampinen, Microsoft take a break from their busy schedule.

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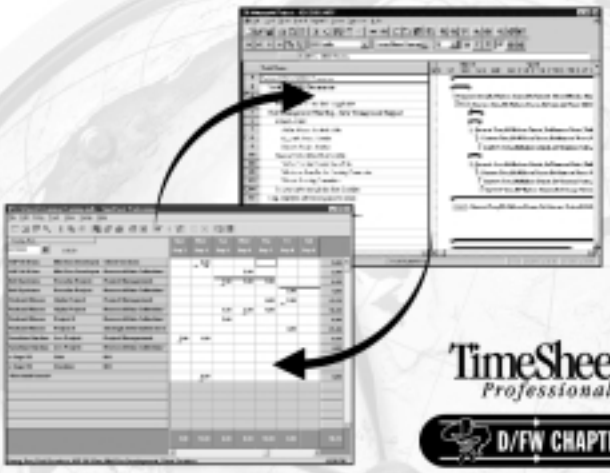

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MPUG-Global Launches Across the Atlantic!

The South East England (SEE) Chapter, MPUG-Global's first chapter in the U.K., was launched with great success on 27th June at Microsoft's UK Headquarters in Reading, England. The record-breaking 102 attendees enjoyed an opportunity to network both before and after the meeting at the two receptions hosted by Microsoft.

Louise Ulrick of Microsoft UK headlined the event, and Ted Dinklocker, Microsoft Corp joined her at the end – giving attendees a unique opportunity to get their questions answered by a key member of the MSP Development Team. To conclude, each attendee was sent home with a free, licensed copy of Project 2002 Standard. ◀

Meeting attendees enjoy the networking reception at Microsoft, Reading. (l to r) Bryan Mangum, Chapter Relations Director, MPUG-Global; Dave Whelbourn, Treasurer, SEE Chapter; Paul Driver, Pcubed (MPUG-Global Founder and Co-Sponsor); Colin Brown, SEE Sponsor Rep

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