For companies willing to invest the time and effort, Six Sigma is a powerful tool in the quest to achieve a significant competitive advantage. A data-driven quality management program developed by Motorola in the 1980s, Six Sigma is aimed at improving performance and driving down defects to almost infinitesimal levels: as low as 3.4 per million. Six Sigma utilizes statistical analysis methods to eliminate variations in service and quality that negatively impact customer satisfaction. When implemented properly, Six Sigma results in enhanced performance, increased customer satisfaction, and improved profitability.

Companies that successfully adopt Six Sigma reap dramatic benefits. At Motorola, for example, the company saved an estimated $15 billion in the first 10 years following the launch of the program. Hard-disk manufacturer Seagate Technology achieved a savings of more than $750 million between 1998-2003.

Implementing a Six Sigma program is not an easy task, however. Built on an extremely rigid methodology, Six Sigma requires wide-ranging organizational change that can be very disruptive. Six Sigma programs require the collection and analysis of extensive amounts of data; the adoption of consistent, repeatable processes; and the ability to communicate detailed project information across an entire organization.

The Microsoft Office Solution Accelerator for Six Sigma was developed to enable companies to achieve the full benefits of a Six Sigma program. Built on the Microsoft Office Enterprise Project Management (EPM) platform, the Office Solution Accelerator for Six Sigma automates and streamlines common Six Sigma tasks while providing comprehensive technology support for Six Sigma management methods. Because the Microsoft Office Solution Accelerator for Six Sigma uses familiar, integrated tools, it can make it dramatically easier to implement Six Sigma.

“Companies are adopting Six Sigma because they know it can make them more competitive,” says Microsoft Senior Product Manager Tim Low. “The flip side is that Six Sigma methods are quite burdensome. The Six Sigma Solution Accelerator eliminates a lot of the pain that companies experience when they begin to tackle Six Sigma.”

The starting point for Six Sigma is a five-step methodology usually referred to as “DMAIC,” for Define Opportunities, Measure Performance, Analyze Opportunities, Improve Performance, and Control Performance. The Office Solution Accelerator for Six Sigma automatically configures the Microsoft EPM Solution to conform to the requirements of DMAIC methodology, while enabling the people who manage Six Sigma initiatives to take advantage of the rich project management tools that Microsoft EPM provides.
The Official Association for Microsoft® Project

“We at Microsoft recognize MPUG-Global as the official international community supporting Microsoft Office Project. We recommend MPUG as a vital resource to any level of the Microsoft Office Project user seeking a community of peers to enhance their experience with this tool.”

Chris Capossela, Corporate Vice President
Information Worker Product Management Group, Microsoft Corporation

From the Editor

The projects that we all work on are very much constrained by time. I know that I would sometimes prefer there to be a 36-hour day, but then I’m still not certain I would get everything done! Either way, whilst we all know that projects can slip, where possible we stick to the timeline and get the job done. I know for one, that the newsletter is a project that must be completed by the due date; otherwise you wouldn’t be enjoying reading this editorial right now!

This issue of the newsletter examines ways to save you time, and ensure that you get the best out of Microsoft Project, so at least the solution won’t stop you delivering on time – even if other external forces do! The cover article examines Six Sigma and how it will revolutionise the way that we collect data, ensuring that it is managed more effectively across the enterprise. Indeed Rich Weller and Ken Jamison both examine how to customise the Microsoft Project toolbar and Gantt Chart respectively, highlighting how to maximise functionality and save time to ensure that the solution provides the most important information. Indeed, whilst Microsoft focuses on the effectiveness of the Six Sigma program within the EPM solution, Dennis Smith looks at how Microsoft Project can work with Excel to ensure that information gathered can be analysed effectively. Brian Kennemer, as ever, keeps on providing us with practical tips on the intricacies of the solution – something that we can forget when examining the bigger picture. On the theory side, Pcubed Perspectives William Raymond looks at the processes behind installing Microsoft Project. What’s the point in implementing the solution if your organisation isn’t ready—again, it wastes time and productivity—and in the project management world, there should be little tolerance for that!

Time is a precious commodity, and whilst your projects may come to an end, MPUG-Global just keeps on going...providing well needed support to those leveraging Microsoft Project. I have been with MPUG-Global for more than three of its seven years, however my journey has come to an end and I have made the decision to leave this fantastic organisation to work in a new industry. Ther e have been some very memorable moments; I again, it wastes time and productivity—and in the project management world, there should be little tolerance for that!

Best regards,

Liz Curwen, Editor
“The Office Solution Accelerator lets you leverage the entire feature set of Microsoft EPM in service of Six Sigma, including tools for resource management and project portfolio management,” says Low. “In addition, the accelerator adds tools such as a financial management module that provides a great framework for the financial project analysis that is a cornerstone of Six Sigma.”

The Office Solution Accelerator targets three critical areas: information management, data sharing, and data mining and reporting. One of the biggest challenges that companies face in implementing Six Sigma is the complexity inherent in collecting and managing information from across business units. Because it is built on easily integrated Microsoft technologies and tools, the Office Solution Accelerator streamlines the job of aggregating critical data. And because the Microsoft EPM Solution is designed to work with Microsoft products such as Microsoft Windows SharePoint Services, Microsoft BizTalk Server, and the Microsoft Office System, it provides the communication, collaboration, and connectivity tools needed to operate easily within an enterprise environment.

In addition, with the Office Solution Accelerator for Six Sigma, many key data mining and reporting tasks are dramatically streamlined.

“With the Solution Accelerator for Six Sigma, project, human resource and financial data can be automatically exported into Microsoft PowerPoint,” says Low. “For example, 4-up PowerPoint slides are a standard way to report Six Sigma data. Typically, creating 4-up slides is a fairly labor intensive manual process for Six Sigma Green Belts or Black Belts. With the Microsoft EPM platform and solution accelerator for Six Sigma, the data collection is automated, and so is the formatting of that data to create the slides.”

While Six Sigma adoption is a single company-wide program, it unfolds as an ongoing series of hundreds—or even thousands—of smaller projects. That means the Microsoft EPM Solutions plays a critical role. With the Office Solution Accelerator for Six Sigma, Microsoft EPM automatically provides a single view into Six Sigma projects across an entire company, giving executives the information they need to ensure that Six Sigma efforts align with overall corporate goals. The Microsoft EPM Solution also provides the necessary framework for implementing consistent project management processes across the entire organization. And, in combination with the Office Solution Accelerator for Six Sigma, it delivers the analysis tools required for measuring the financial impact of Six Sigma projects.

“There's no doubt that Six Sigma methodology can deliver remarkable results,” says Low. “But until now, the price of implementing Six Sigma has been pretty steep. By taking the tools and technologies that make up the Microsoft EPM Solution, plus complementary features from Microsoft Office, and configuring them specifically to meet the needs of Six Sigma users, Microsoft is making the disruptions inherent in Six Sigma much more manageable. That makes the goals of a Six Sigma program much more achievable.”
We all say it. We all mean it. But unfortunately, we do not always live it. Of course I am referring to the idea of implementing a software product, like Microsoft Project, before some very important decisions are made. Since Microsoft Project is a fairly easy-to-use software tool, it is sometimes considered ‘easy enough' to install and use right out of the box. In some regards this statement is true. However, it is not as easy to know the best way to manage resources, adjust timelines, track earned value, store a baseline and generally manage your project from beginning to end. This takes training, practice and patience. It also requires a working knowledge of how and why Microsoft Project calculates your schedule the way it does.

More importantly, if the bulk of your organization is still trying to decide how to accomplish things like defining budgets, estimating resources and developing business cases, this should raise a red flag or two (or three). You might first consider stepping back and taking a look at the foundational groundwork that needs to be laid to deliver a successful rollout. For example, implement a Project Management (PM) Maturity level study first. Going through this exercise will help you identify not just where you want to go with project management, but where you need to start. For some organizations, Project Managers are highly trained professionals in that field and are knowledgeable in PM best practices. In other organizations there are pockets of knowledge and some Project Managers are playing that role simply because they are a subject matter expert. Knowing where you are on the PM Maturity level will help you get your arms around a Microsoft Project rollout and make it easier to understand where the risk areas are.

If your organization is on the lower spectrum of a PM Maturity level, this is a sign that you might want to hold off on implementing the tool and first put some PM fundamentals in place through training and mentoring. It is also important to decide what effect the tool will have on your people and what processes need to be defined. By realistically “sizing up” where your organization is at, you will get a much better feel for just how much functionality to rollout within Microsoft Project.

Now, you might have already selected Microsoft Project because it is the market leader or maybe you even got it by default with your Microsoft licensing plan. Well, if you have it and the CD is sitting on your desk, why not install it and get going, right? Well, probably not. It is tempting and you will have people that want to get started right away, so let’s instead try to figure out how you can have your cake and eat it too.

As you may have already made up your mind to use Microsoft Project, consider a pilot that is 50% process and training. The other 50% might represent a Microsoft Project Sandbox environment to test ideas and functionality. This “kick the tires” approach will help your organization get acquainted with the new way projects will be developed and maintained. This method should also help gain internal traction. Whether we admit it or not, having a repeatable, documented process with a tool that supports it makes our lives much easier. Of course, not everyone will admit this, but you know that is what they are thinking.

This might be obvious, but it is important to remember that Microsoft Project is not a one-size-fits-all application. For example, your Sandbox testing may highlight a need to integrate with your line of business systems or other custom internal applications. That is where expert support is needed. I, along with my Pcubed colleagues, have experience working with many companies to expedite surfacing particular needs and have provided end to end solutions to fill any gaps with a custom or a range of 3rd party tools.

Once you have developed your specific internal project delivery policies and a select group of Microsoft Project users have been trained, consider a phased rollout of the solution. Companies that “beta” the product for a period of time tend to be the most successful in providing a solid architecture and retaining ongoing users. This beta period might be for several months and include a core team of users that you know will be strong champions for the product. Since this core team will have already hit any major roadblocks, it will be natural for them to provide hands-on mentoring and training to new users of the system as they come on board.

With this approach, you should have a successful rollout of Microsoft Project with a willing and fully trained user community. With this said, remember to keep in mind the power of support resources available to you. Most people reading this article are already members of MPUG-Global and will benefit from the ongoing stream of information to continue enhancing your use of the system. Consider encouraging your colleagues and clients to join as well, as the more educated and trained your user community is... the better for all.

In conclusion, walk; don’t run to implement your Microsoft Project system. And remember to follow these steps for a successful rollout of Microsoft Project:
1. Make sure you fully understand the audience for the tool and what they can handle.

2. Develop a working relationship with the potential users and make sure you have buy-in and testing built into the process. To get buy-in, ensure you know what your users want out of Microsoft Project too.

3. Work with Microsoft Project while you are developing your processes and methodologies. This will help you identify gaps in the functionality and will provide you with some real-world, hands-on training for your team.

4. Do not try to re-invent the wheel. Pcubed, as an Enterprise Premier Partner, has talented people using configurable processes who more than likely have already addressed the business or tool problems you are having.

5. Train, train, train your team in the business processes and the technology!

6. Beta test the tool with people that really are excited about using it and want the project to be a success. As more people are familiar with the tool, you will have a better internal support base. Hopefully, this will foster a team environment where people can call on each other and share experiences before they give up on using the solution.

7. Rollout Microsoft Project after you have addressed the critical issues found throughout your testing.

7-point Checklist for a Successful Microsoft Project Rollout

1. Understand your audience
2. Get buy-in
3. Work with the tool
4. Don’t reinvent the wheel
5. Train your team!
6. Beta test
7. Roll-out

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*Offer ends on July 31, 2004
Brian Kennemer is a Microsoft Office Project MVP and Project Specialist for QuantumPM. Along with penning this column, Brian is also the Vice President for the MPUG-Global Puget Sound Chapter.

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

**Managed Time Periods**

Changing periods is something that you don't want to do often. Hopefully, you will be able to pick a period “size” and stick with it. However, there will be circumstances when you need to change the periods “in mid-stream”. The thing to remember is that you cannot change a period that already has actual work in it. So, if a resource has already submitted timesheets in a period, there is nothing you can do – you cannot change that period. However, you will want to plan ahead so that you change the date ranges for FUTURE periods.

**Yes Virginia, Project Really CAN do Spiral Development Methodologies**

Several years ago I heard someone say that Microsoft Project was outdated because it was only suitable for projects that used a so called “waterfall” scheduling methodology. I heard it again recently and was struck again at how inaccurate this statement really is. I’m not sure if this thinking comes from the need to reject the old and embrace the new trends in the software development business or if it has to do with the zealotry with which people embrace their favorite software development methodologies, but it has to stop. In my opinion, saying that Microsoft Project (or for that matter any of the other scheduling software, such as Primavera, Niku, Artemis) cannot model a spiral or iterative development lifecycle is just being intellectually dishonest.

First let’s look at waterfall and spiral methods very briefly. What is a “waterfall” methodology? It is the term given to a lifecycle where all the design is done before any of the development starts and where all the development is done before any of the testing starts. Its Gantt chart looks like a waterfall with each phase joined with a finish-to-start relationship.

What is a spiral or iterative methodology? It is a lifecycle where the design, develop, test phases are repeated several times before the end product is complete. There are several different flavors of this methodology but in general it is characterized by many repeated small cycles of the general phases of a waterfall methodology. Practitioners of this methodology like to describe this visually with a spiral diagram where each phase is repeated as the spiral goes in toward the center (or sometimes out). This visual representation might be part of the problem where these same people think that Microsoft Project cannot model the method.

Both of these methods are valid for different kinds of projects. Just like no one Task Type in Microsoft Project is appropriate for all tasks in a project and no one kind of hammer is best for all kinds of construction; different software development methodologies are appropriate for different kinds of projects. If you have all the requirements you need up front and they will stay static, then a waterfall methodology is fine. However, if you do not have all the facts up front or you expect them to change then a form of spiral development might be best.

Here is the fun part. What do you suppose that nice spiral diagram would look like if you unrolled it and laid it out across a timescale… a waterfall maybe? :-) Yes! It would look like a waterfall remarkably like the one for the waterfall methodology; it is just that this waterfall would have more phases. It would have several design phases, several develop phases – and yes even several test phases – and then it would have a final test phase at the end. If you can lay it out on a timescale, then you can model it in Microsoft Project (or any other scheduling application). I think it is often the case that people involved in something new or innovative can get a little carried away with the whole cool nature of being cutting edge. Don’t get me wrong, I think that many of the “new” methodologies offer some great benefits. However, when the “coolness” of your tool gets intoxicating to the point that you stop seeing the benefits of other things that are different, there is a problem!

In the end, the third design iteration of a spiral project or a “sprint” in a SCRUN project or the Testing Phase in a waterfall project all have some things in common; they all have a start and finish date, they all require work to complete, and they all need resources to complete them. No matter how special you make the framework, these are still just tasks that need to be scheduled.

In thinking and talking about this issue with some experts in such methodologies, I think the heart of the issue is that most spiral or iterative methods do not lend themselves well to knowing when a project will be finished. This is because you rarely know how many spirals you need to do in order to finish the product. However waterfall methods are best used for projects where all the requirements are known up front, as their schedules are somewhat deterministic of their finish date. You can lay out all your tasks up front, and Microsoft Project provides a nice neat path to the Finish data, which makes managers very happy! However, in an iterative method, you might know up front there will be at least four iterations but the very essence of an iterative method is that during any iteration you might discover the need for one or more additional iterations. This means that the schedule does not show a real model of how the project will look at the end, which makes managers very sad!

This sadness highlights another common project in Microsoft Project: schedules should never be seen as 100% deterministic. They should be seen as the current best guess of what the project does or will look like. When discussing your project you should say: “with what we know right now about the project, the projected finish date is XXX”. I would recommend you avoid saying “the project will finish on XXX”. It is easy, when using Microsoft Project to use the latter wording when talking about finish dates. I think that’s why practitioners of iterative methods might feel uncomfortable using Microsoft Project or any other software, because of their own tendency to see a Gantt chart as deterministic.

The moral of the story is that Project can be used for spiral or iterative methods as long as those doing so are clear on the fact that the schedule should be seen as a model of what you currently know about the project, and not deterministic of the actual finish date.
Introduction

Microsoft Project is a great planning and communications tool; a shared source of information about the project, its history and its expectations. Reporting your project information in the form that best suits the needs of your team is crucial. There is an incredible amount of information in the plan that might be of interest to the team. As shown in the main reporting menu in Figure 1, there are many ways to look at that data, however there are more ways to analyze your project for statistics, patterns, or trends, than even Microsoft could imagine. So enter Microsoft Excel. In my mind this is the gold standard for reporting and analysis and is the best way to report on your project when the available Project reports don’t quite show you what you want.

This article presents ideas about the paths for moving data from Project to Excel, some of the advantages and disadvantages of each, and how to deal with some of the peculiarities of the data after it arrives in Excel.

Standard Reports

If you can get your data by using a standard Project report, go for it. The standard reports cover most all of the traditional project views. An important tool for using standard Project reports is the Reports Organizer (see Figure Two); this is found by clicking Organizer under the Tools menu and then selecting the Reports tab. The left side shows a large selection of reports which are stored in the master template. The right side shows those in the current project file. If you had a report or view in a previous project that you want to use in a current project (such as the classic PERT view) simply open Organizer in the old project, select that view in the right pane, use the Copy button to copy it to the master template. Next open the new project, open the Organizer, select the view in the left pane and transfer it to your new project. Close the Organizer and your view now will be included in the menus of your new project.

Continued on page eight
I need to focus on the characteristics of the linkages between tasks, an area not over by standard reports. To complete this analysis, I move the Microsoft Project data to Excel.

**Exporting Reports to Excel**

I have not found any data in Microsoft Project that cannot be exported. The Microsoft Office Project 2003 export wizard provides options that allow you to export any subset or grouping of your project data to meet your needs, and to save that data collection as a Map for later reuse. To start the wizard, select Save-as under the File menu. As the wizard starts, you can choose from Access, Excel Workbook, XML, plain text, and a few other formats. We’ll follow Excel through the Wizard.

The next step in the Wizard is to choose between the Project Excel Template and Selected Data. If you choose the Project Excel Template and click finish, your Excel file will contain ID, Name, start, finish, predecessors, outline level, and notes. To get the exact data you want, choose Selected Data.

After you choose Selected Data, the wizard provides you with another choice whether you want to use an existing map or define a new one. The existing maps cover a range of data-sets that might meet your needs, as shown in Figure Three.

To make your own, choose New Map instead of using an existing map. While it might take a few minutes to an hour or more depending on the complexity of what you want to transfer to Excel, once you have made your own Map using the Export Wizard, you can easily reuse it for this project. You can also use the Organizer mentioned above to move it to the master template and then copy it into any of your project files.

When you save the project data file from Microsoft Excel you will notice that the Excel export format from Project is read by Excel as being in Excel 95 format. When you get that notice, simply tell Excel to save in its normal format by selecting yes as shown in Figure Five.

**Copy and Paste**

You can also grab any of the tabular data that you can see in Microsoft Project by highlighting it and using the Copy feature under the Edit menu. After you Paste the data into Excel, a great first step is to highlight all of the imported columns and then use AutoFit Selection under the Column selection of the Format menu. Sometimes using the screen view as a visual report building tool allows you to be more certain that you have the correct data fields and may be faster than using the Export Wizard for a one-time data transfer.
Fixing the Formatting in Excel
Once you have the data in Excel, you might want to do an optional cleanup. A typical export from the Project Excel Template method looks like Figure Six.

The start and finish dates are imported as normal Excel data formats, so their date format can be changed by selecting the dates, right-clicking in the selection, and choosing Format Cells... from the pop-up context menu. Next click on Date in the category selection and choose your date format from the Type selection on the right side of the window. Click OK and your dates are reformatted. Figure Seven shows what it looks like with an international date format:

Changing the duration into an Excel-friendly format requires one more step. While this looks like a text field, it is actually a number field with the character d appended. This makes it easier to use than it first appears.

First you can just use the field as-is for most calculations. If you add 2 to it (=C4+2) the sum will be correct and the d will carry through to the result. If you multiply it by a fixed value (=C4*2) the answer will be correct, however the d will be lost.

Continued from page eight

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### Is your organization EPM seaworthy?

It’s a challenge to keep an organization safe and healthy on the journey to attain strategic goals. **Enterprise Project Management (EPM)** provides companies with efficient ways to collaborate through managing projects & resources, and providing views into project performance information at different levels across the organization.

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To change it to a normal number-only format, simply highlight the numbers, right click, select Format Cells... click on Number in the category selection, choose your numeric format and click OK. Figure Eight shows the table without the d, all cleaned up and ready to go.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>3 Product Packaging Design</td>
<td>30</td>
<td>11-Jul-03</td>
<td>21-Aug-03</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>4 Datasheets Complete</td>
<td>65</td>
<td>25-Jul-03</td>
<td>23-Oct-03</td>
<td>3SS+2 wks</td>
<td></td>
<td>2</td>
</tr>
</tbody>
</table>

Figure Eight

Please note: The Export Wizard seems to convert all dates into one unit (e.g. it converts weeks to days) when it exports to Excel, but the copy and paste approach does not make that conversion. If you use multiple units for durations in your project plans and the copy/paste method, your duration column will include multiple time units and you will have to edit your Excel sheet to reconcile the units.

Other Automation

There are many more ways to manipulate your data within Microsoft Project to make your work easier after you export. These include using macros and formulas with custom Project fields. A great introduction to the power of formulas can be found in Volume 7, Issue 4 of MPUG-Global's Project Network newsletter starting on page eight.

Conclusion

Reporting in Microsoft Office Project 2003 is great; there has been a tremendous advance in the solution. However while Microsoft Project continues to improve, making it easier to use, so does Excel. The tools offered in Excel can really help to analyze your project data and can provide valuable analysis of your project plans and the data that has built them.

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MPUG-Global Enters US North Central Market: Twin Cities Chapter Launches

March 2004 welcomed the launch of the MPUG Twin Cities Chapter in Minnesota, USA. The launch meeting was hosted at the Microsoft North Central District Office, providing members and guests in that region with an excellent opportunity to network and further their knowledge of Microsoft Project. Tom Moen, Microsoft Productivity Technical Specialist (BPTS), provided the keynote, demonstrating how Windows SharePoint integrates with Microsoft Project. The presentation was well received, sparking questions, comments and lively debate from the nearly 50-strong crowd. In addition, Tim Cermak, MPUG-Global’s Chapter Relations Director, showcased the association's value proposition, including an in-depth tour of one of MPUG’s chief member benefits—the “Members Only” content library of the MPUG website.

The Twin Cities launch event facilitated opportunities for MPUG-Global to meet with representatives from both Microsoft and PMI, and gain an understanding of how MPUG-Global can impact the local marketplace. These discussions proved incredibly valuable for all parties involved, and demonstrated how important an MPUG presence will be in providing this value-added resource to professionals who leverage Microsoft Project in their careers and businesses.

Tim Cermak facilitates a networking opportunity for MPUG Chapter Officers and Sponsors. (left to right) Daniel Renier, Twin Cities President & Chapter Sponsor (Milestone Consulting Group); Tim Cermak; Tom Moen, Microsoft BPTS; Daniel Rohwer, Microsoft BPS, Twin Cities Chapter Sponsor and host of the launch event; and Stan Berger, Twin Cities Treasurer. (Officers missing are Rich Garlock & Rich Schlegel).
Some things I'll never understand, like why the sky is blue and why my toast always lands butter side down, and why a few buttons are not on the standard toolbar within Microsoft Project! I have taught a number of classes focusing on the basics of Microsoft Project, and even before I enter the first task, I always show my students how to add buttons to their toolbar. These buttons make updating your schedule more efficient and prove to be a lot less time consuming. I'll bet over the course of my project management career, these buttons have managed to save me a few very precious hours of time!

Follow these instructions to insert the buttons:
1. Open Microsoft Project
2. Click on View, Toolbars, then Customize
3. Click on the Commands Tab
4. Now click on the Edit Command
5. The first option to add is the Delete Row button
6. Simply scroll down and click on Delete Row. Now drag it up and place it wherever you would like on your standard toolbar. (See Figure One).

Customizing Your Microsoft Project Toolbar
By Rich Weller, Pcubed (R.E.P. Officer, Southeast Michigan Chapter)

Note: The screenshots used are from Microsoft Project 2003, but will work as a guide for any version.
Customizing Your Microsoft Project Toolbar
Continued from page eleven

7. Now scroll down and click on Hide Column.
8. Drag it up to your toolbar. (See Figure Two)

Now that you have a feel for this process, here is the entire list of buttons that I recommend you add:

Under Edit
• Delete Row
• Hide Column

Under Insert
• Insert Task
• Column (Inserts Column)

Under Format
• Font (Quickly change font style and color)

I promise these five buttons will speed your work tremendously. There are a lot of other buttons you can use, so feel free to add those that you need to use on a regular basis.

Newsletter Authors Wanted!
Do you have a Microsoft Project case study, tip or trick to share with your fellow MPUG-Global members? We are always looking for informative articles that showcase your insight and expertise. If you have an idea or an article that you would like to submit, please email info@mpug.org.

Supercharge Microsoft Project with Milestones Project Companion.

Like Microsoft Project? Well, so do we. We like it so much, we built our software to not only work hand-in-hand with Project, but to enhance its functionality as well. So, if you thought Microsoft Project was great before, wait until you try it with our new Milestones Project Companion.

Project Companion enables you to:
• Make presentation schedules directly from Project and keep them up-to-date
• Distribute schedules to others with a free viewer
• Publish large schedules as HTML pages for easy management access to drill-down details
• Add schedules to PowerPoint slide shows

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Milestones Project Companion

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Adding Information to Your Gantt Charts
Ken Jamison, Applied Project Management (President, Western New York Chapter)

Introduction

If you use the Gantt Chart View to schedule tasks, you are not alone - it is probably the most used view type. The fact the Gantt Chart is the default view has a lot to do with this, but it is also because most users of Microsoft Project use this view primarily to schedule tasks. If you use the Gantt Chart to create schedules and not just to display them, you may want it to have some characteristics of the Network Diagram. For example you may want it to display more fields around the bars, or perhaps conditionally display fields based on the task’s data. One way to do this is to put combinations of fields into a custom text field and display the custom text field in the chart area with the bars. Positioning data values with corresponding symbols in the chart area helps the project manager to visualize the relative nature of the data in the plan. It also helps to find situations where requirements finish after design, or testing finishes before development ends, and also highlights which minor tasks may suddenly appear critical. Adding data to the graphic display is useful, allowing any anomaly to be seen immediately. Any data that you display in the chart area can also be put into a table. The disadvantage of using a table is that it can be difficult to manage with a lot of columns, and the data is also not in immediate proximity to the bar. Using a table tends to drive you to scroll left and right frequently or add horizontal gridlines and as a consequence smear the screen with finger prints! In this article I will look at some examples about how to add information to your Gantt Charts.

How much Total Slack and Free Slack is there?

If you have ever manually leveled resources or shortened a schedule, you will know that slack is a critical measure of how much time is either available for optimizing or lack in a project. When looking at slack, knowing that the bar is blue or red is not all that helpful. However, it is very important to know by how much it is blue or red. Something that I have found useful is to combine Total and Free Slack into a text field and plot it to the right side of the Gantt bars and then plot their values as different colored lines drawn underneath. To combine the two fields, select a text field and define it for that purpose (see Figure 1).

1. Select menu options Tools, Customize, Fields...
2. Select Text as the field Type
3. Select one of the Text1-30 fields and rename it
4. To add the formula (see Figure 2):
5. Select the Formula… button, select the Field button, select Duration and then Total Slack
6. To identify what the number is, add the prefix T= and the suffix d
7. Add a comma and space between the two fields
8. Add the Free Slack field by selecting the Field button, select Duration and then Free Slack
9. Add the prefix F= and the suffix d

Microsoft Project calculates durations in minutes, which means this formula will format that raw number. To plot the values in days, divide each number by the minutes per day (see Figure 3):
1. Add a forward slash “/” after each field name
2. Select the Field button
3. Select Project, Number, and Minutes per Day

If you do not want all the decimals that the division operation can produce, format the number (see Figure 4).
1. Place the cursor directly in front of [Total Slack]
2. Select the Function button
3. Select Text and then Format
4. Replace the word “expression” with [Total Slack]/[Minutes Per Day]
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5. Replace the word format with “0.0”
6. Delete the rest of the function up to the closing parenthesis
7. Do the same for Free Slack

To decrease interference with dependency lines, add a couple of spaces at the beginning of the formula in front of the “T”. Your formula should look like the one below (see Figure 5).

Add Total Slack and Free Slack bars to the chart (see Figure 6).

Add the text field to the non-critical tasks (see Figure 7).

The resulting view is Figure 8 below.

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This is a reasonably simple example; in previous issues of this newsletter we have seen how custom fields can calculate data based on conditions of data. In this case, displaying Free Slack for critical tasks does not add anything, because it is always “0”. However, Total Slack is meaningful for critical tasks, but displaying it as a bar on the finishing end of a task is not very useful. If we display Total Slack at the starting end and draw a bar to the Late Start date, this will show how late a task is starting (with respect to its constraints), when a particular situation occurs. To use only one custom field for this purpose, it needs to display only the Total Slack field when a task is critical. That requires a conditional statement in the formula. The formula as it is now should apply only when the task is not critical; this can be identified when the field Critical is not true, displaying as ”No” in a table. To ensure that the Total Slack is shown when the task is critical, add the if function (see Figure 9).

In addition, we need to add a bar for the negative slack, shown in the bar styles table (see Figure 10).

The new resulting view is shown in Figure 11 below.

You can probably think of a number of ways to apply this technique to your needs. It may not take much of a formula to display just the data you need to see; it’s really up to you to change the information to ensure that the views are relevant to you and your project.
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