M P you G

Expedite Project Updates Using a Custom Status View

June 20, 2018 @ 12pm-1pm EST

Presented By:

Walter M. Stinnett, Jr., PMP, CSM, MCTS

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Objectives

- Describe the importance of monitoring and controlling projects

- Discuss why communication is key to successful projects

- Define the schedule control process and the importance of accurate status

- Create a custom status view to expedite project updates

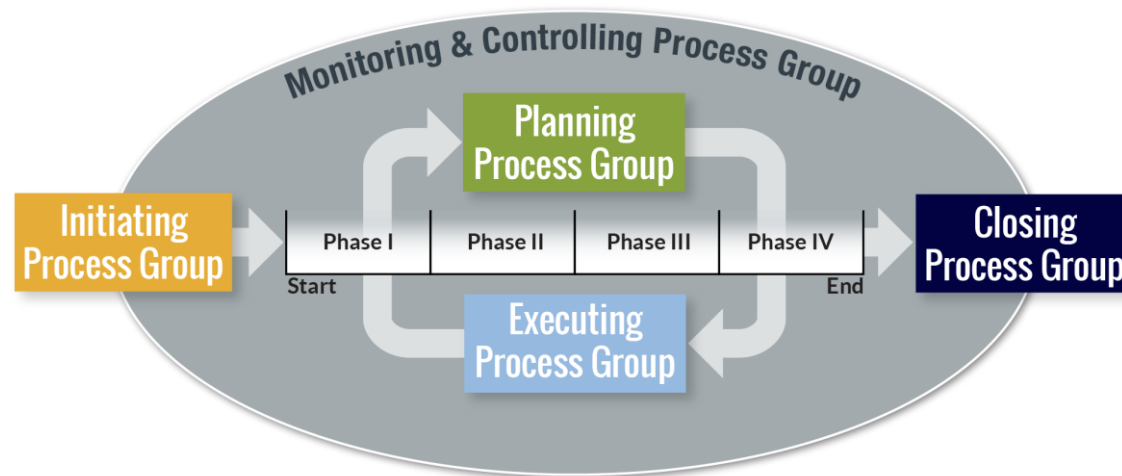# Five Project Management Processes

- Initiating

- Planning

- Executing

- Monitoring and Controlling

- Closing
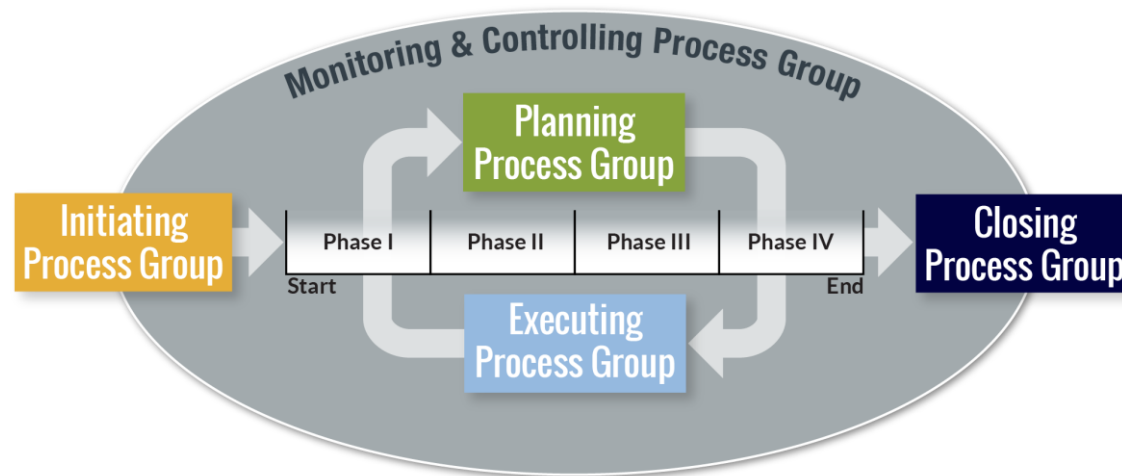
Graphic adapted from Project Management Institute, *A Guide to the Project Management Body of Knowledge,*
*(PMBOK® Guide)* –Sixth Edition, Project Management Institute Inc., 2017, Page 23

Monitoring and Controlling Process

- Track, review, and regulate project progress and performance

- Identify any required plan changes

- Initiate corresponding changes

Definitions from the Project Management Institute, *A Guide to the Project Management Body of Knowledge,*
(PMBOK® Guide) – Sixth Edition, Project Management Institute Inc., 2017

Project Schedule Management Knowledge Area
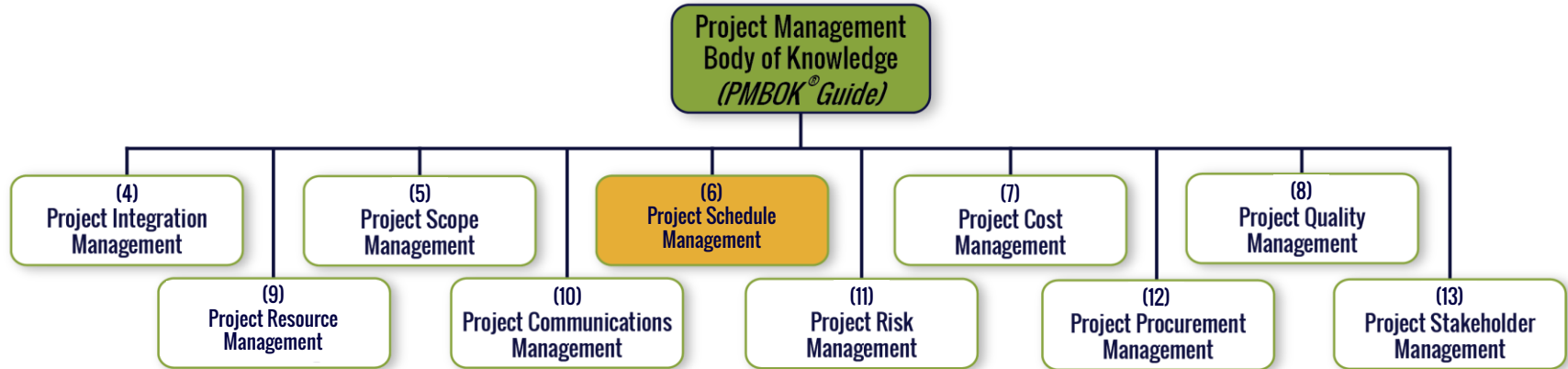
- Processes required to ensure timely project completion
  - Plan Schedule Management
  - Define Activities
  - Sequence Activities
  - Estimate Activity Durations
  - **Develop Schedule**
  - **Control Schedule**

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Why Use a Schedule Tool?

- Why develop a detailed project work schedule?
  - Communication (between you and your stakeholder/customer/client)
  - Communication (between you and your project team)
  - Communication (between you and your senior management)

- Why use a scheduling tool like Microsoft Project?
  - Calculate and display project task dates
  - Calculate and display use of resources
  - Assist in managing the schedule once developed
    - Scheduling tools do **NOT** build a schedule
  - Calculate the project critical path
  - Track and communicate progress
  - Set up and examine "What if" scenarios

Control the Schedule

- Controlling (or status updating) the project schedule involves
  - Determining schedule changes
  - Managing the actual changes, as they occur

- To determine and manage project schedule changes, you must track the actual project progress against the original project plan (schedule baseline)

Information Needed to Track Progress

- Availability for each resource
  - Was the resource available, as planned, during the status period?
  - Is the resource going to be available, as planned, moving forward (to your knowledge)?

- Task schedule for each task
  - If the task started, when did task work begin (Actual Start)?
  - If the task is complete, when did it finish (Actual Finish)?
  - If the task is not complete
    - How much calendar time (typically days or hours) has been spent on the task?
    - How much more calendar time is needed?

- Task cost for each resource, on each task
  - How much work was expended on the task by the resource?
  - How much work is needed, by each resource, to complete the work?

Create a Custom Status View

- Combines a task detail form with a task usage view, allowing updates in one view
  - Actual start and finish
  - Actual and remaining work
  - Duration
  - Percentage complete
  - Resource assignments

Custom Status View

Our Project

Create Base Custom Table

- **Step 1:** Select the **View** tab

- **Step 2:** Select **More Tables** from the **Tables** dropdown

Create Base Custom Table

- **Step 3:** Select the **Task** radio button for table type

- **Step 4:** Select the default **Usage** table from the list and click **Copy**

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Step 4: Select the default **Usage** table from the list and click **Copy**
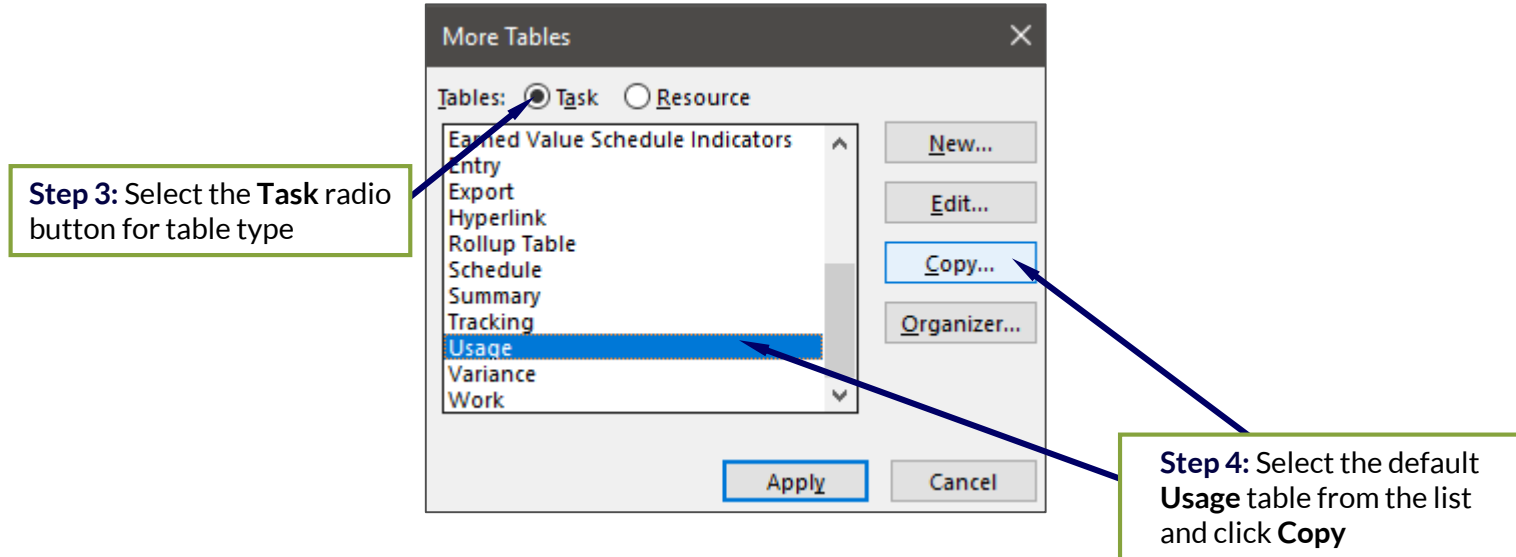
Create Base Custom Table

- **Step 5:** Rename the table

- **Step 6:** Modify the fields and adjust the formatting, if needed

- **Step 7:** Click **OK** and to close **Table Definition** dialog

- **Step 8:** Click **Cancel** to close **More Tables** dialog

Table Definition in 'Building the Widget'

Name: Usage Tracking Table ☐ Show in menu

Table

| Cut Row | Copy Row | Paste Row | Insert Row | Delete Row |

Field Name	Align Data	Width	Title	Align Title	Header Wrapping	Text Wrapping
ID	Center	10		Left	Yes	No
Indicators	Left	10		Left	Yes	No
Name	Left	50	Task Name	Left	Yes	Yes
Start	Right	15		Left	Yes	No
Finish	Right	15		Left	Yes	No
% Work Complete	Left	10		Center	Yes	No

Date format: Default   Row height: 3

☑ Lock first column
☑ Auto-adjust header row heights
☐ Show 'Add New Column' interface

Help

Step 5: Rename the table
Step 6: Modify the fields and adjust the formatting, if needed

OK   Cancel

More Tables

Tables: ● Task ○ Resource

Earned Value Schedule Indicators
Entry
Export
Hyperlink
Rollup Table
Schedule
Summary
Tracking
Usage
Variance
Work

New...
Edit...
Copy...
Organizer...

Apply   Cancel

Step 7: Click **OK** and to close **Table Definition** dialog
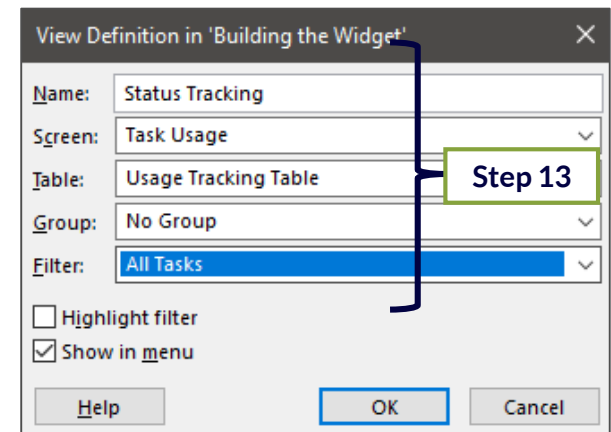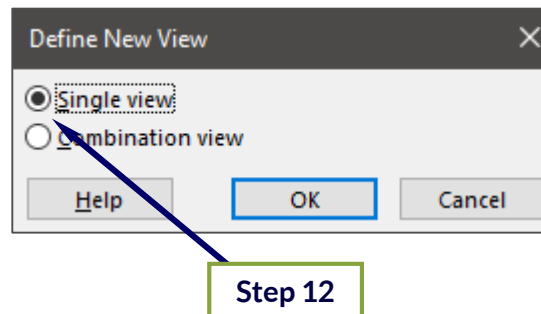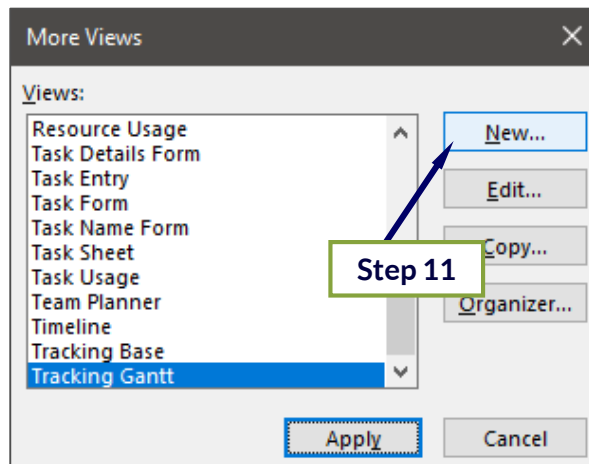**Step 8:** Click **Cancel** to close **More Tables** dialog

Create Primary Custom View

- **Step 9:** Select the **View** tab

- **Step 10:** Select **More Views** from the **Other Views** dropdown from the **Task Views** group
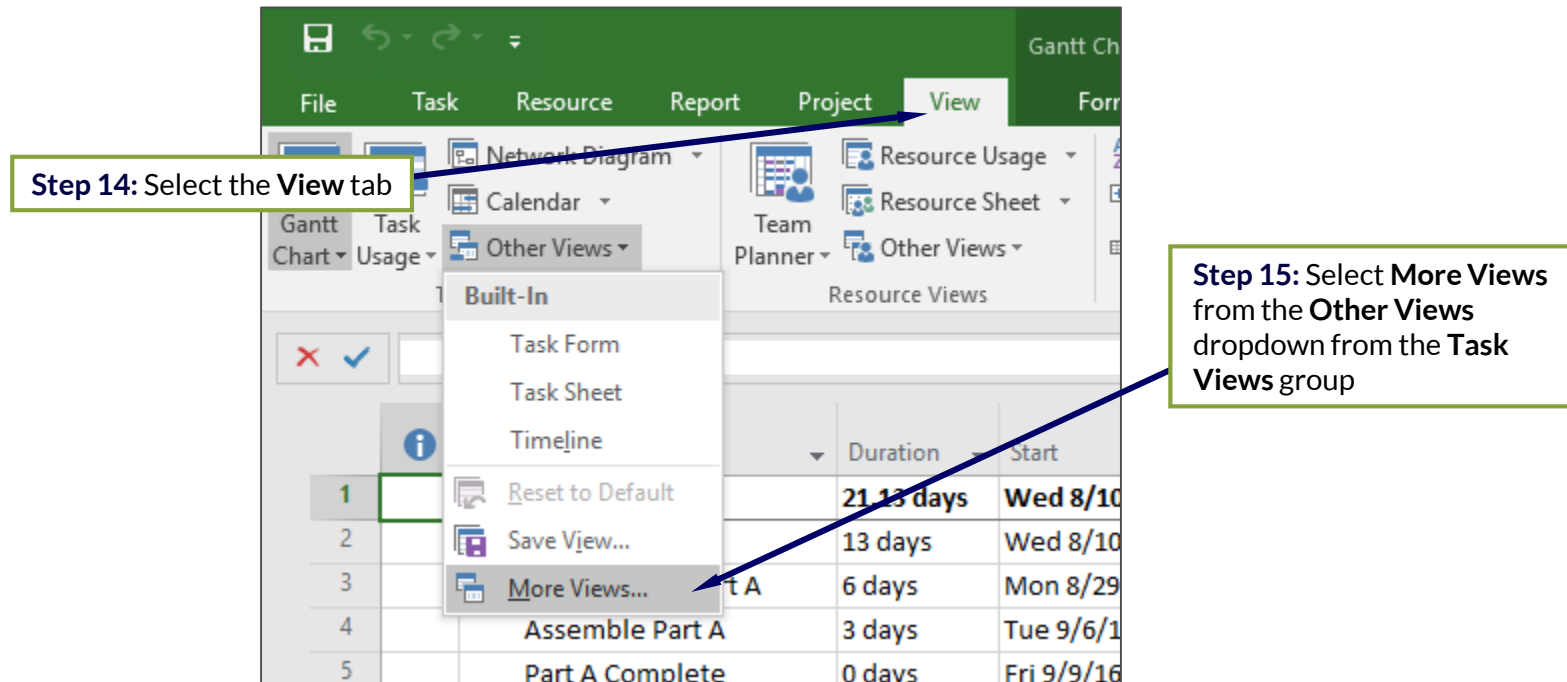
Create Primary Custom View

- **Step 11:** Select the **New** button in the **More Views** dialog
- **Step 12:** Select the **Single** view radio button in **Define New View**
- **Step 13:** Select the following in the **View Definition** dialog
  - Name: Enter name of new view
  - Screen: Task Usage
  - Table: Select the new custom table
  - Group: No Group
  - Filter: All Tasks

Create the Custom Status View

- **Step 14:** Select the **View** tab

- **Step 15:** Select **More Views** from the **Other Views** dropdown from the **Task Views** group

Step 14: Select the **View** tab

Step 15: Select **More Views** from the **Other Views** dropdown from the **Task Views** group

Create Primary Custom View

- **Step 16:** Select the **New** button in the **More Views** dialog
- **Step 17:** Select the **Combination view** radio button in the **Define New View** dialog
- **Step 18:** Select or enter the following in the **View Definition** dialog
  - Name: Enter name of new view
  - Primary View: Select the just created single view
  - Details Pane: Task Details Form
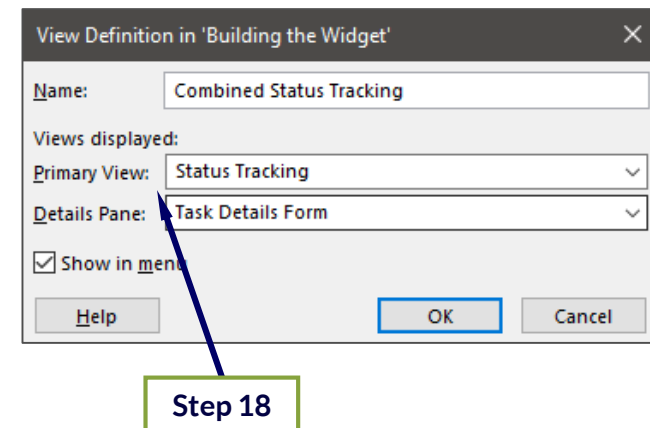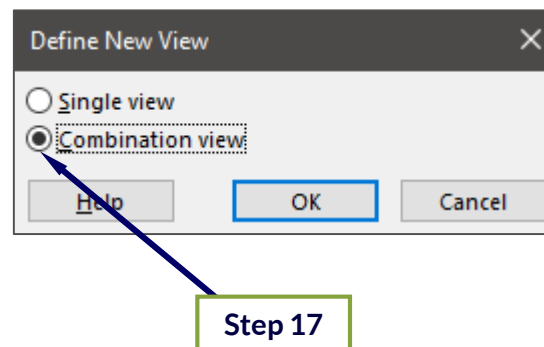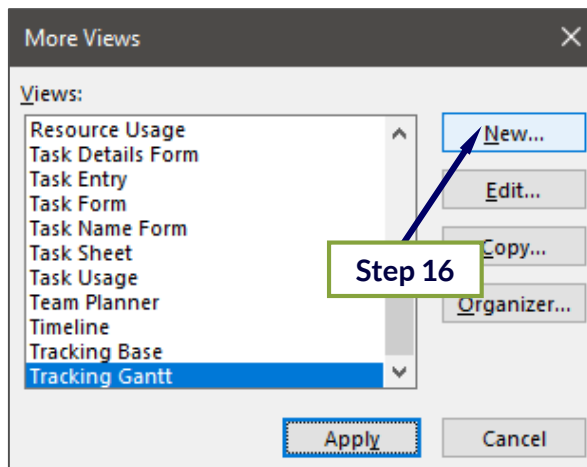
Display Custom Status View

- **Step 19:** Select the **Task** tab

- **Step 20:** Select **Combined Status Tracking** from the **Gantt Chart** dropdown from the **Task Views** group

Custom Status View

Modify Format of Task Usage Panel

- **Step 1:** Right click anywhere in the task usage panel and select **Detail Styles**

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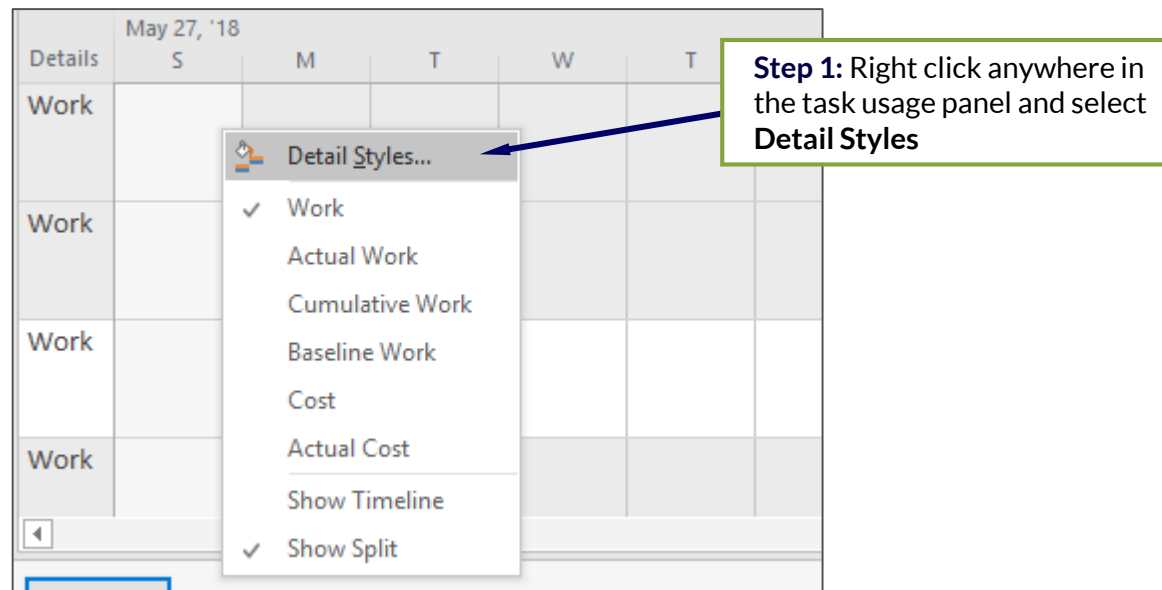
Add Fields to Task Usage View

- **Step 2:** Select **All Assignment Rows** in the **Show these fields** list and click **Hide** to remove it from the view

- **Step 3:** Select **Baseline Work** and **Actual Work** in the **Available fields** list and click **Show** to add them to the view

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Step 3: Select **Baseline Work and Actual Work** in the **Available fields** list and click **Show** to add them to the view
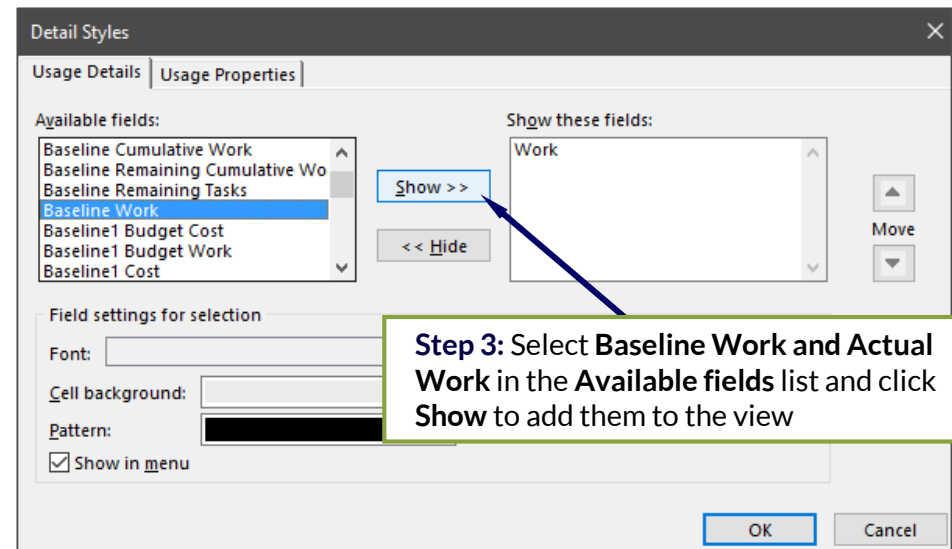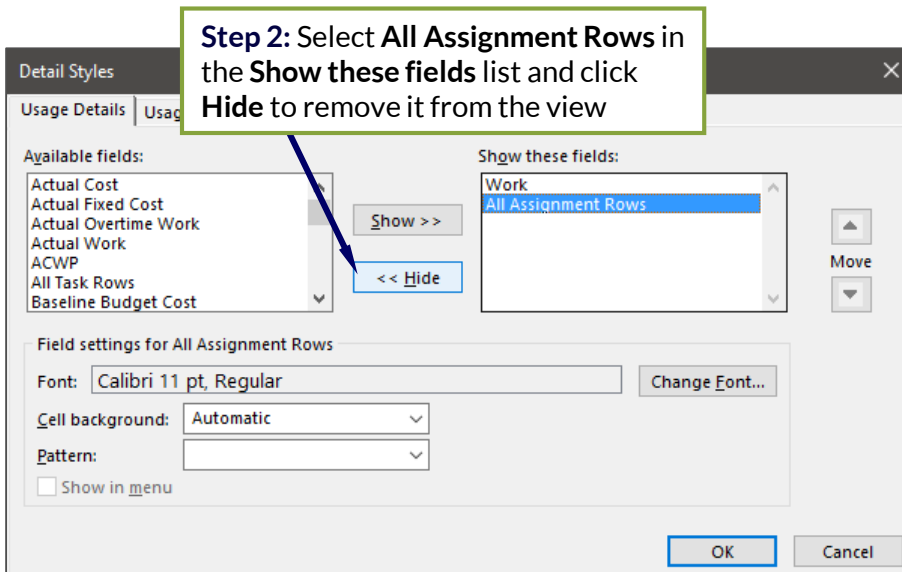
Modify Field Order and Cell Background Color

- **Step 4:** Select **Baseline Work** in the **Show these fields** list and click the up **Move** arrow to move it to the top of the list

- **Step 5:** Select **Baseline Work**, **Work**, and **Actual Work** fields in order and assign each a different cell color
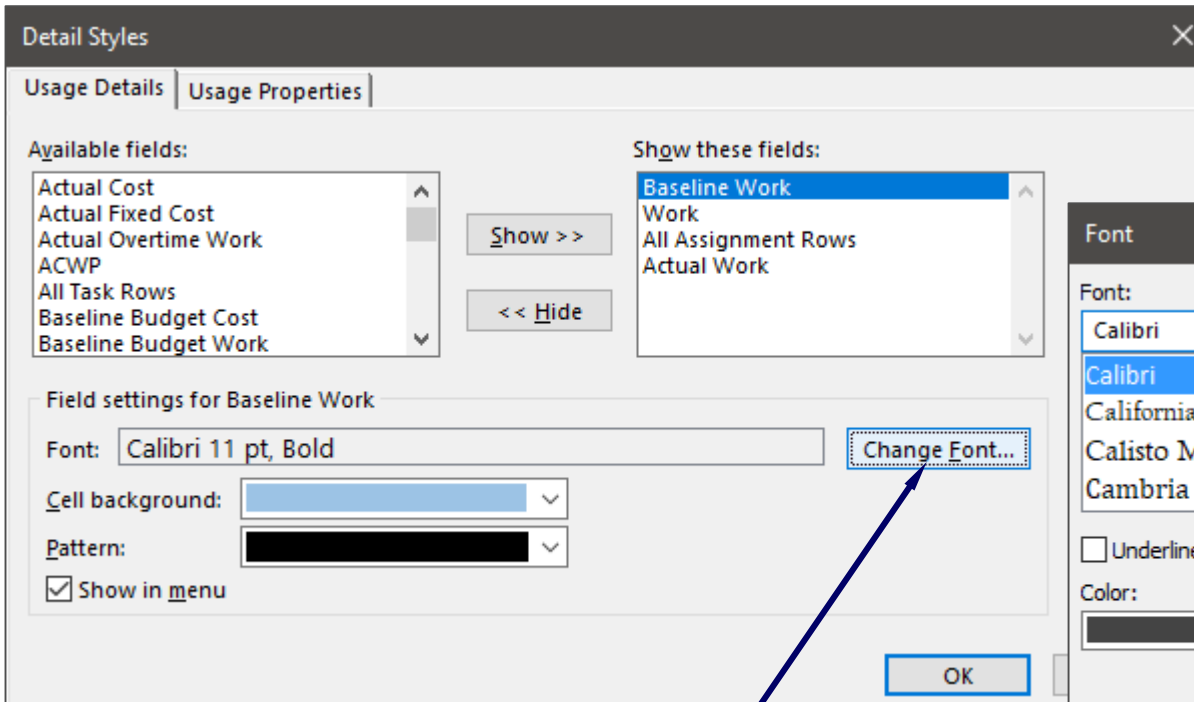

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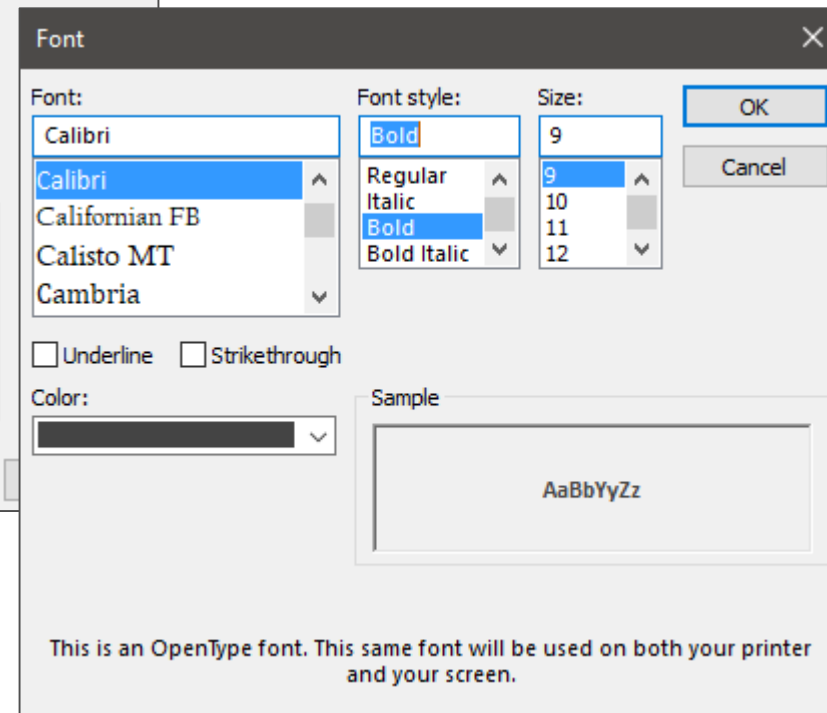
Step 5: Select **Baseline Work**, **Work**, and **Actual Work** fields in order and assign each a different cell color

Change the Font Style of Fields

- **Step 6:** Select fields in order and click the **Change Font** button to modify font and/or font style

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Completed Custom Status View

- Save file as a .mpt project template or copy into other project schedules via the Organizer

Questions?

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Thank You!

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