



# Expedite Project Updates Using a Custom Status View

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**Presented By:**

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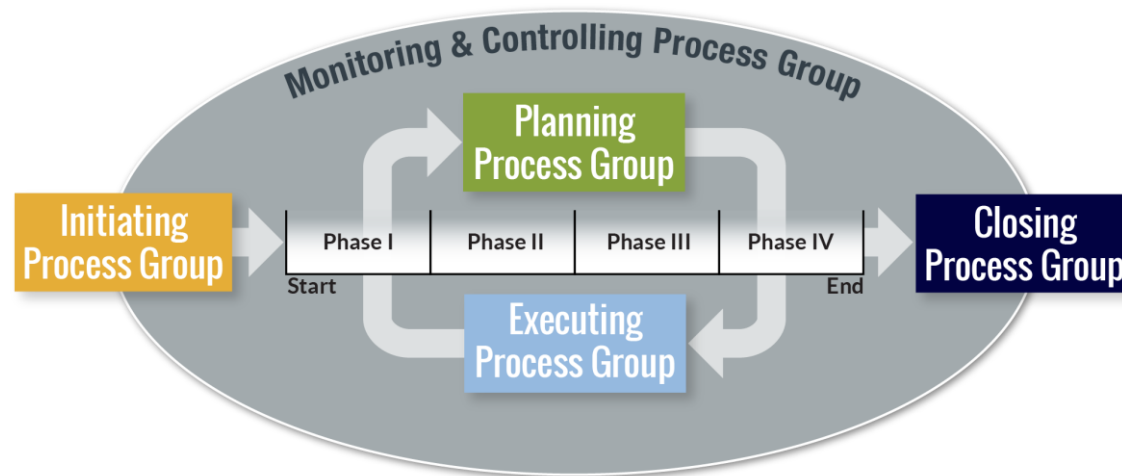
# Objectives

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- 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

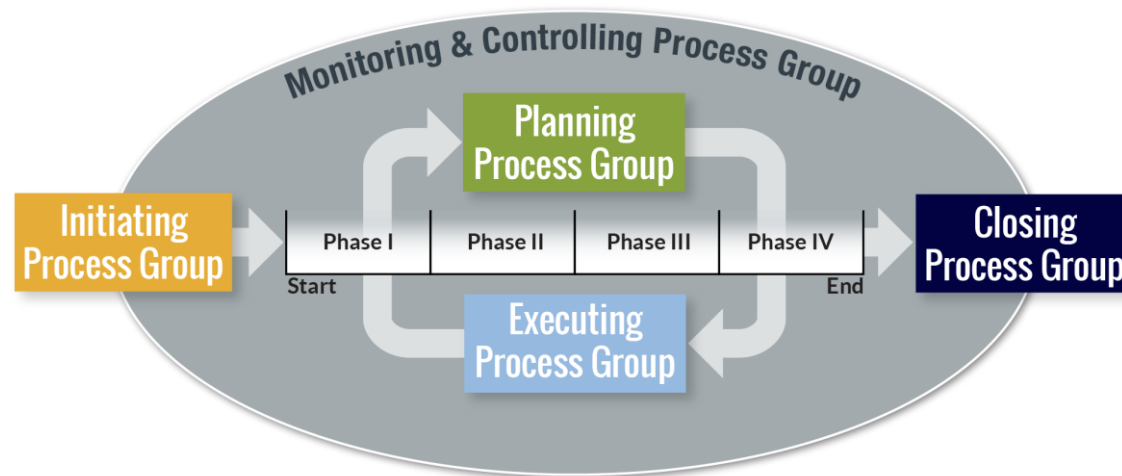
- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing



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

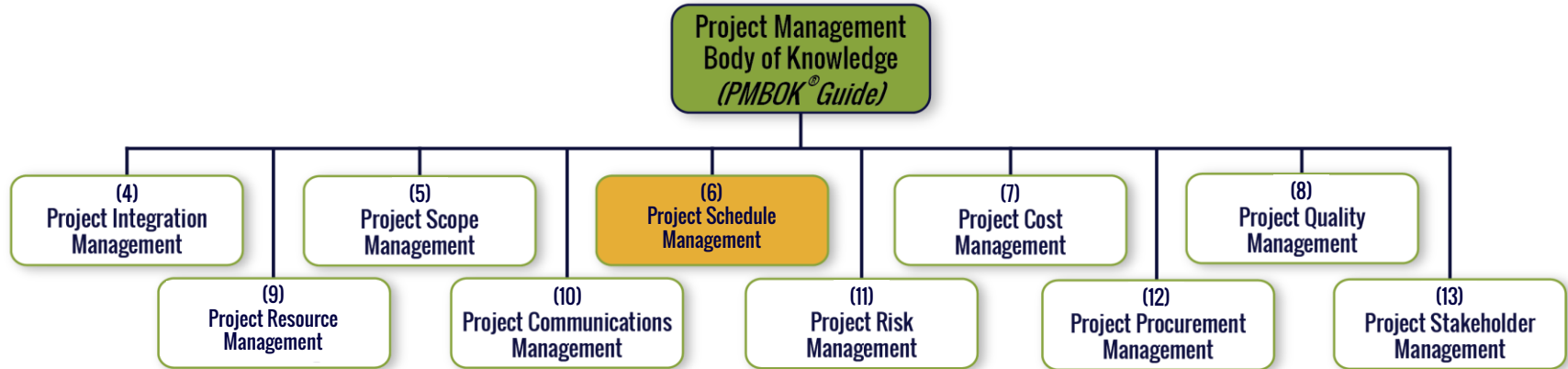
# Monitoring and Controlling Process

- 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**



# 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

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- 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

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- 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

Task Usage Tools Building the Widget.mpp - Project Professional

File Task Resource Report Project View Format Tell me what you want to do... Sign in

View Clipboard Font Schedule Tasks Insert Properties Editing

Calibri 11 0% 25% 50% 75% 100% Mark on Track Respect Links Inactivate Manually Schedule Auto Schedule Task Information Scroll to Task

**STATUS TRACKING**

Task Name	Planned Start	Planned Finish	% Work Complete
1 Part A	Wed 8/8/18	Fri 9/7/18	0%
2 Design Part A	Wed 8/8/18	Fri 8/24/18	0%
Sharon Ebbs	Wed 8/8/18	Fri 8/24/18	0%

**Details**

	8/5	8/12	8/19	8/26
Base. Work	24h	40h	40h	40h
Work	24h	40h	40h	40h
Act. Work				
Base. Work	24h	40h	40h	
Work	24h	40h	40h	
Act. Work				
Base. Work	24h	40h	40h	
Work	24h	40h	40h	
Act. Work				

**TASK DETAILS FORM**

Name: Design Part A Duration: 13 days ☒ Effort driven ☐ Manually Scheduled Previous Next

Dates

Start: Wed 8/8/18 Finish: Fri 8/24/18

Constraint

As Soon As Possible Date: NA

Task type: Fixed Units WBS code: 1.1

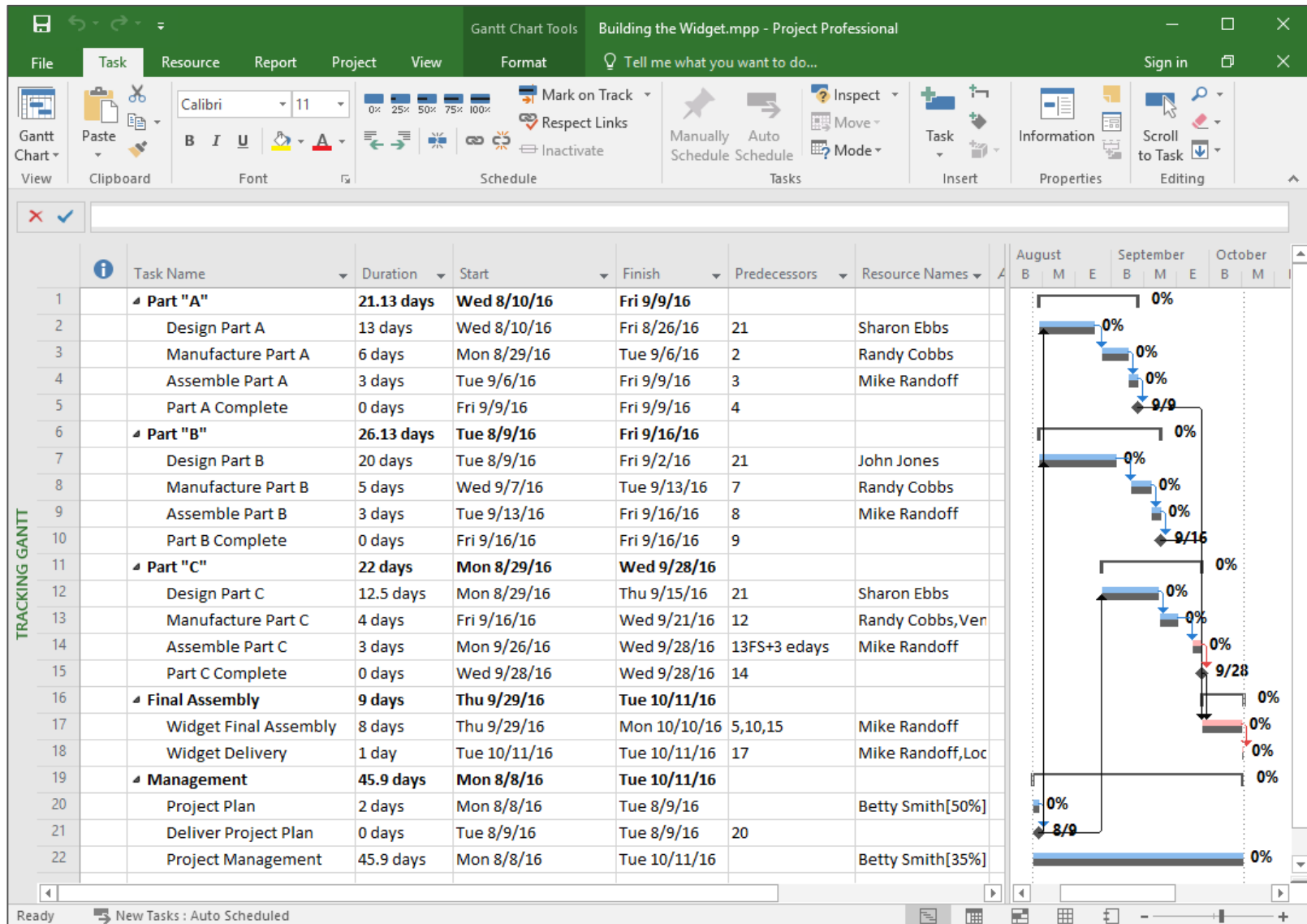
Current ☐ Baseline ☐ Actual

Priority: 500 % Complete: 0%

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
2	Sharon Ebbs	100%	104h	0h	104h	0h	104h

New Tasks : Auto Scheduled

# Our Project



# Create Base Custom Table

- **Step 1:** Select the **View** tab
- **Step 2:** Select **More Tables** from the **Tables** dropdown

The screenshot shows the software interface with the 'View' tab selected in the top ribbon. The 'Tables' dropdown menu is open, displaying a list of built-in tables. The 'Entry' table is currently selected, indicated by a green checkmark. The 'More Tables...' option at the bottom of the dropdown is highlighted by a blue arrow. A callout box labeled 'Step 1: Select the View tab' points to the 'View' tab. Another callout box labeled 'Step 2: Select More Tables from the Tables dropdown' points to the 'More Tables...' option.

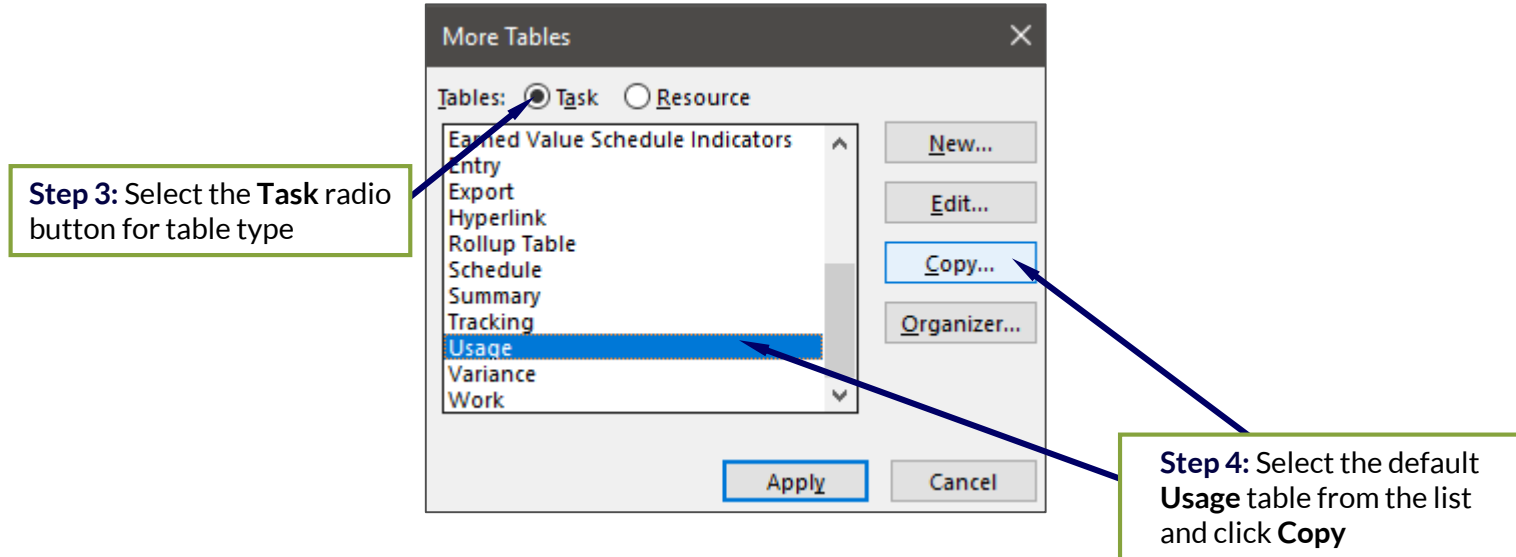
**Step 1: Select the View tab**

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

Task Mode	Task Name
1	Part "A"
2	Design Part A
3	Manufacture Part A
4	Assemble Part A
5	Part A Complete
6	Part "B"
7	Design Part B
8	Manufacture Part B
9	Assemble Part B
10	Part B Complete

# 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**



# 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:  ☐ Show in menu

Table

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:  Row height:

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

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

More Tables

Tables: ☒ Task ☐ Resource

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

**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

The screenshot shows the Microsoft Project interface. The 'View' tab is selected in the ribbon. The 'Other Views' dropdown menu is open, showing options like 'Task Form', 'Task Sheet', 'Timeline', 'Reset to Default', 'Save View...', and 'More Views...'. A blue arrow points from the 'More Views...' option to a callout box. Another blue arrow points from the 'View' tab to a callout box.

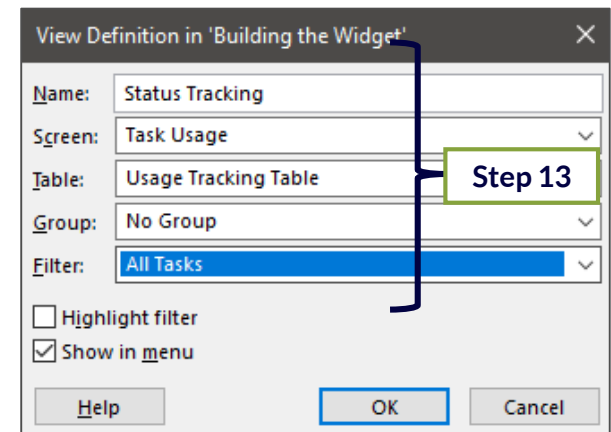
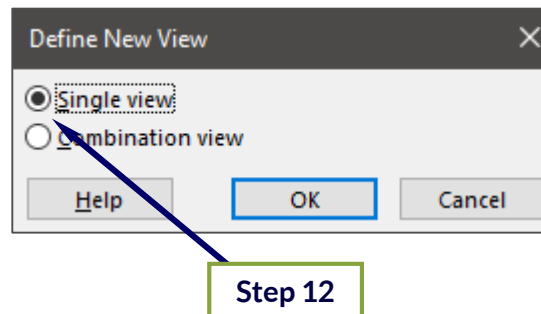
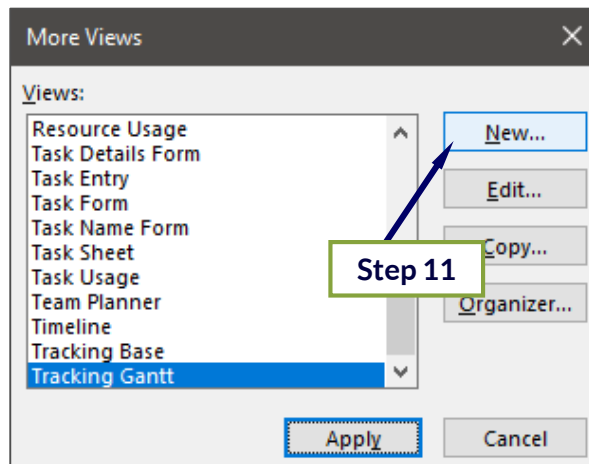
**Step 9:** Select the **View** tab

**Step 10:** Select **More Views** from the **Other Views** dropdown from the **Task Views** group

	Duration	Start
1	21 13 days	Wed 8/10
2	13 days	Wed 8/10
3	6 days	Mon 8/29
4	3 days	Tue 9/6/1
5	0 days	Fri 9/9/16

# Create Primary Custom View

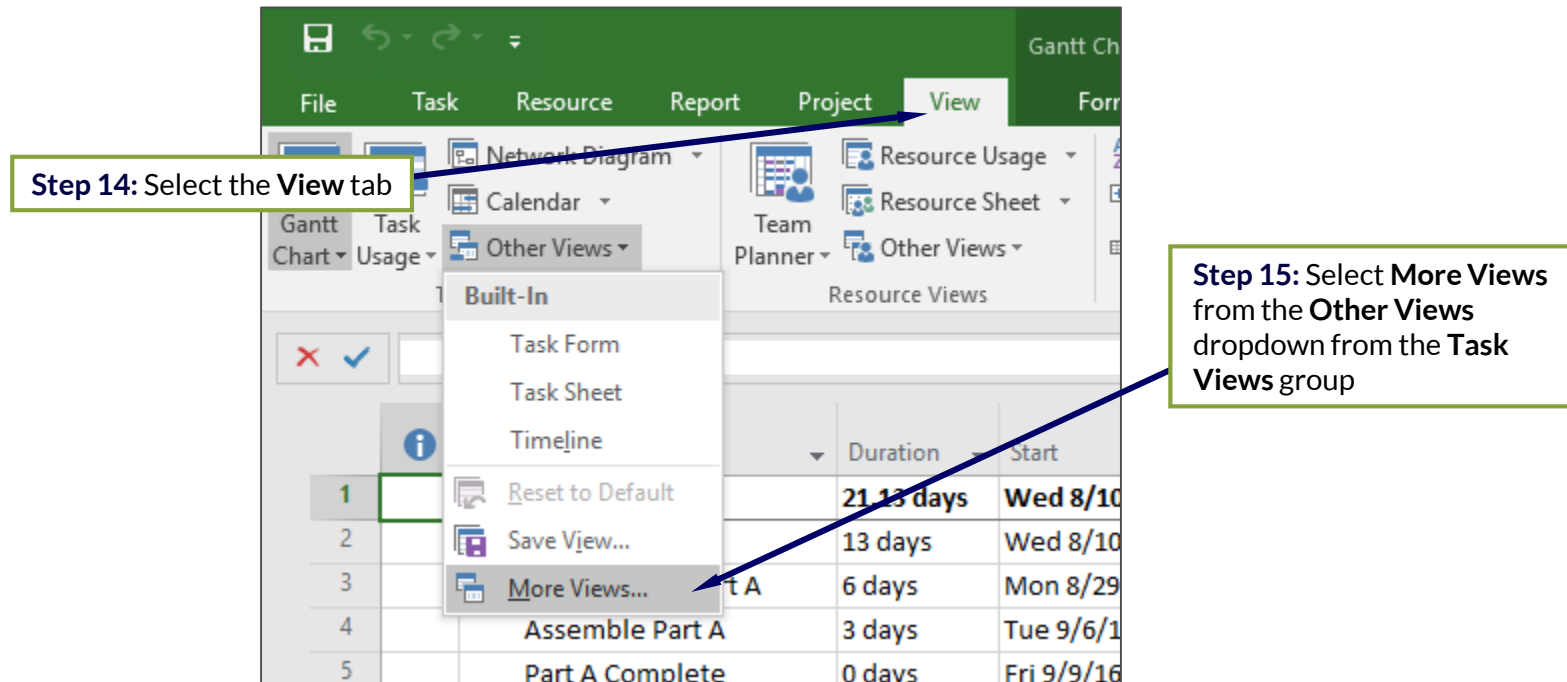
- **Step 11:** Select the **New** button in the **More Views** dialog
- **Step 12:** Select the **Single** view radio button in **Define New View**
- **Step 13:** Select the following in the **View Definition** dialog
  - Name: Enter name of new view
  - Screen: Task Usage
  - Table: Select the new custom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





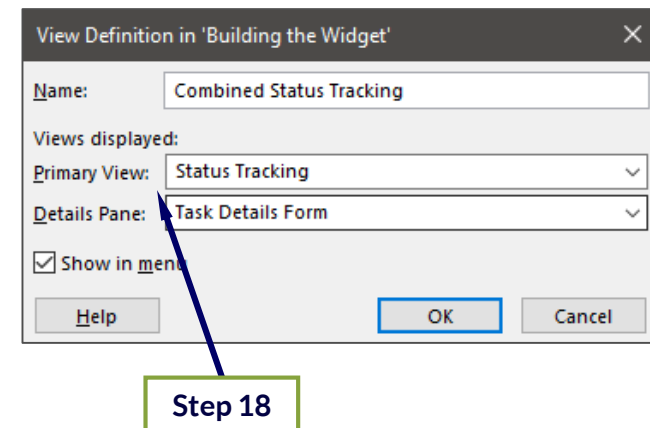
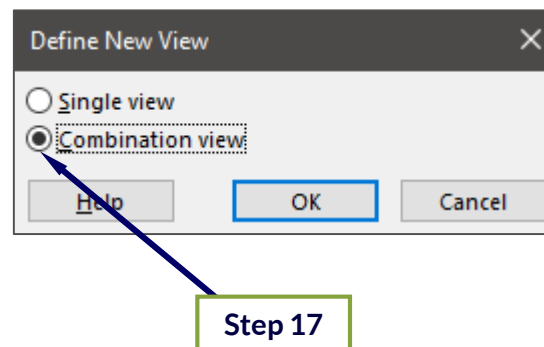
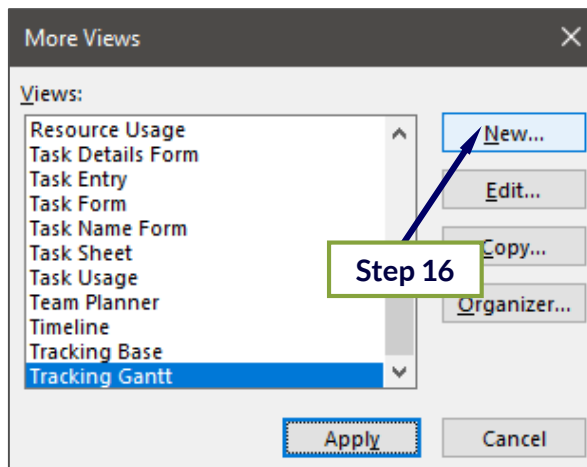
# Create the Custom Status View

- **Step 14:** Select the **View** tab
- **Step 15:** Select **More Views** from the **Other Views** dropdown from the **Task Views** group



# 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

The screenshot shows the Microsoft Project software interface. The 'Task' tab is selected in the ribbon. The 'Gantt Chart' dropdown menu is open, showing the 'Custom' section with 'Combined Status Tracking' selected. A callout box points to the 'Task' tab with the text 'Step 19: Select the Task tab'. Another callout box points to the 'Combined Status Tracking' option with the text 'Step 20: Select Combined Status Tracking from the Gantt Chart dropdown from the Task Views group'.

	Duration	Start	Finish
	21.13 days	Wed 8/10/16	Fri 9/9/16
Part A	13 days	Wed 8/10/16	Fri 8/26/16
Part A	6 days	Mon 8/29/16	Tue 9/6/16
Part A	3 days	Tue 9/6/16	Fri 9/9/16
Complete	0 days	Fri 9/9/16	Fri 9/9/16
	26.13 days	Tue 8/9/16	Fri 9/16/16
Part B	20 days	Tue 8/9/16	Fri 9/2/16

# Custom Status View

✖ ✔

						May 27, '18		
						S	M	T
STATUS TRACKING	1	Task Name	Start	Finish	% Work Complete	Details		
		▾ Part "A"	Wed 8/10/16	Fri 9/9/16	0%	Work		
	2	▾ Design Part A	Wed 8/10/16	Fri 8/26/16	0%	Work		
		Sharon Ebbs	Wed 8/10/16	Fri 8/26/16	0%	Work		
3	▾ Manufacture Part A	Mon 8/29/16	Tue 9/6/16	0%	Work			

Name:

Dates: Start:  Finish:

☒ Current ☐ Baseline ☐ Actual

Duration:

Constraint:

Date:

Priority:

☒ Effort driven ☐ Manually Scheduled

Task type:

WBS code:

% Complete:

Previous Next

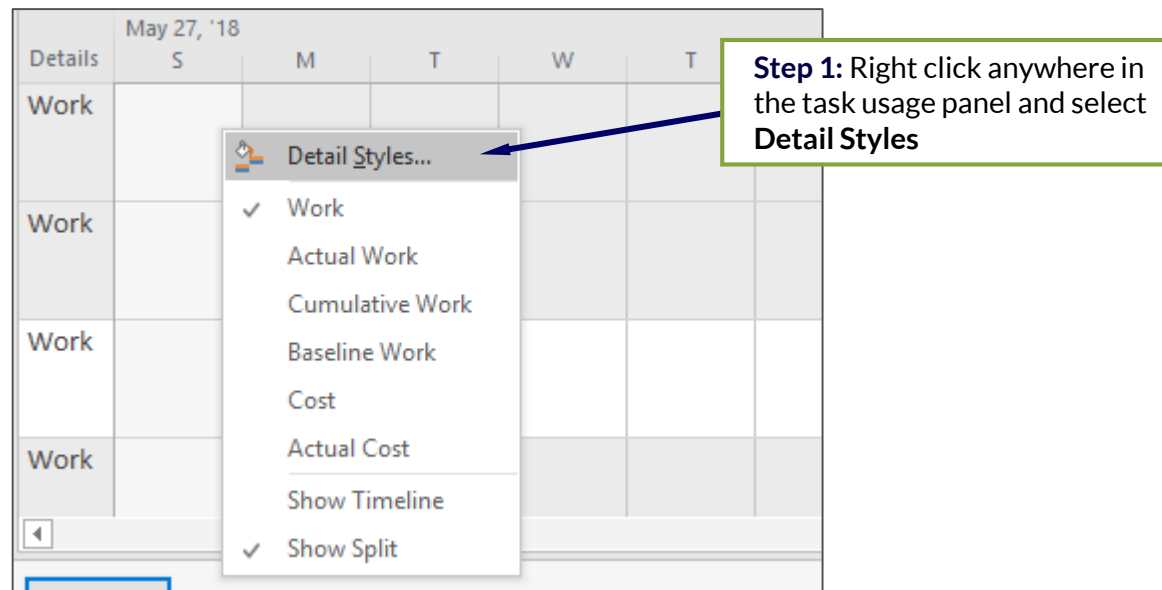
ID	Resource Name	Units	Work

ID	Predecessor Name	Type	Lag

Ready
➔ New Tasks : Auto Scheduled

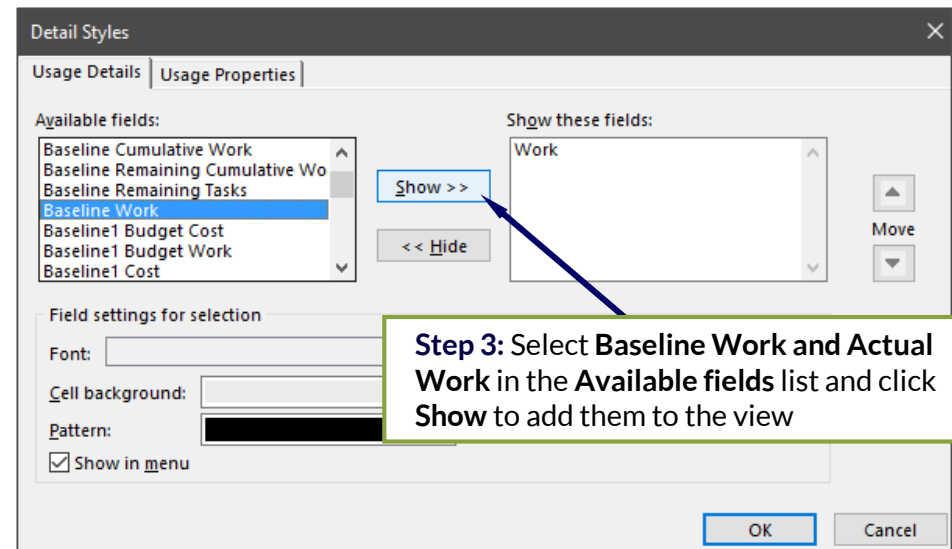
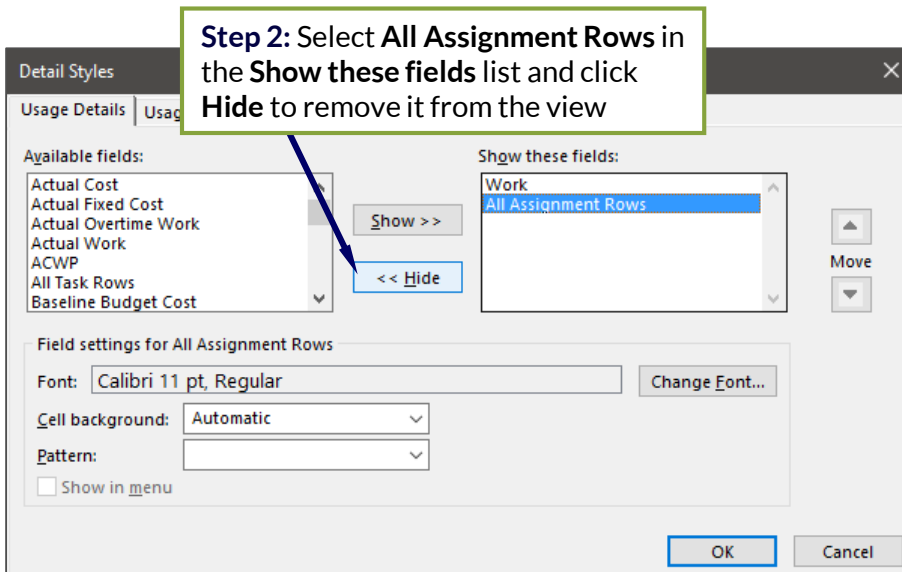
# Modify Format of Task Usage Panel

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



# 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



# 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

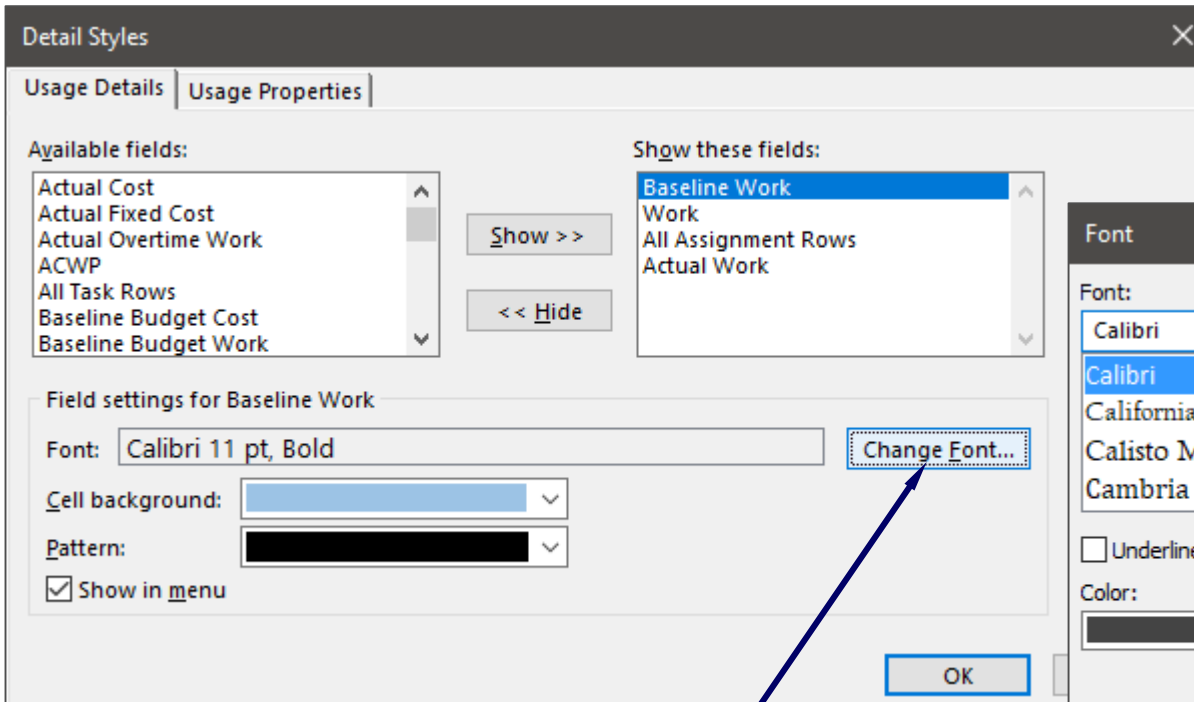
The screenshot shows the 'Detail Styles' dialog box with the 'Usage Properties' tab selected. The 'Available fields' list on the left includes 'Baseline Remaining Cumulative Work', 'Baseline Remaining Tasks', 'Baseline1 Budget Cost', 'Baseline1 Budget Work', 'Baseline1 Cost', 'Baseline1 Cumulative Work', and 'Baseline1 Remaining Cumulative Work'. The 'Show these fields' list on the right contains 'Baseline Work', 'Work', and 'Actual Work'. The 'Field settings for Baseline Work' section shows the font set to 'Calibri 11 pt, Regular' and the cell background color set to 'Automatic Color'. A color palette is open, showing 'Theme Colors' and 'Standard Colors'. A blue arrow points from the 'Move' button in the 'Show these fields' list to the 'Automatic Color' dropdown. Another blue arrow points from the 'Automatic Color' dropdown to the 'Blue, Lighter 40%' color swatch in the 'Standard Colors' section.

**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

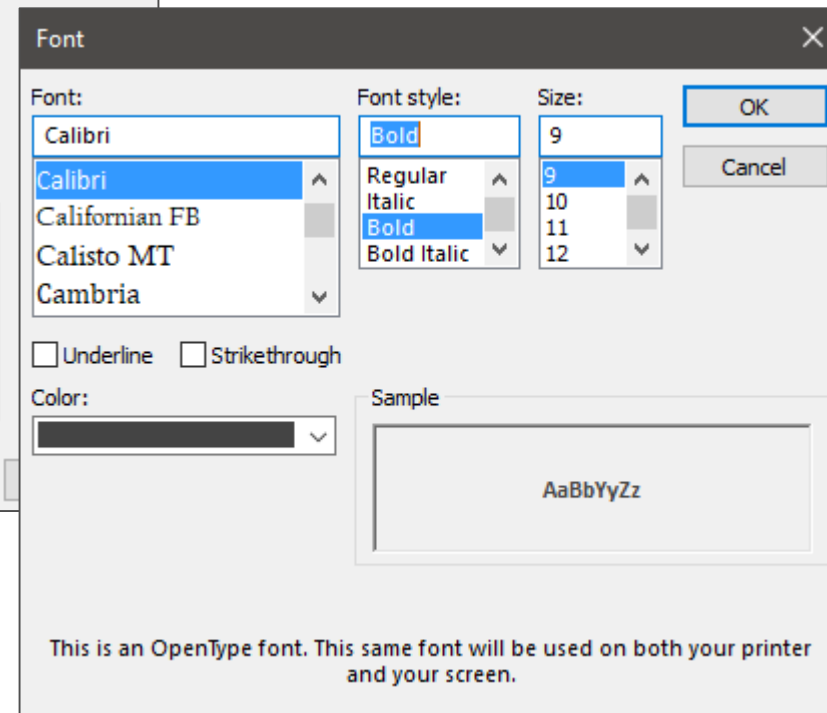
**Step 5:** Select **Baseline Work**, **Work**, and **Actual Work** fields in order and assign each a different cell color

# 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



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





# Completed Custom Status View

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

The screenshot displays the Microsoft Project Professional interface. The 'TASK USAGE TOOLS' ribbon is active, showing options for 'Manually Schedule' and 'Auto Schedule'. The 'STATUS TRACKING' view is selected, showing a Gantt chart and a task list. The task list includes 'Part A' and 'Design Part A', both assigned to 'Sharon Ebbs'. The 'TASK DETAILS FORM' is open, showing the task 'Design Part A' with a duration of 13 days, start date of Wed 8/8/18, and finish date of Fri 8/24/18. The task is currently 'Current' and has a priority of 500. The 'WBS code' is 1.1 and the 'Task type' is 'Fixed Units'. The 'Task Usage' table shows the task is 100% complete with 104h of work.

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
2	Sharon Ebbs	100%	104h	0h	104h	0h	104h

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# Questions?



# Thank You!

**Presented By:**

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