



Where Project Managers and Microsoft® Meet.

MPUG Boston Chapter Meeting

08.05.15



Welcome to MPUG!

M P  G

Boston

Presentation will start at 6:15pm



● Agenda

<i>From - To</i>	<i>Topic</i>
<i>5:30 – 6:30 pm</i>	<i>Registration, Refreshments & Networking</i>
<i>6:30 – 6:45 pm</i>	<i>Welcome & Introductions Announcements Upcoming Meeting Topic Discussion</i>
<i>6:45 – 7:45 pm</i>	<i>Feature Presentation John Riopel: Microsoft Project Custom Formulas & More! Audience Participation / Speaker Q&A</i>
<i>7:45 – 8:15 pm</i>	<i>Project Break-out Sessions & Refreshments</i>
<i>8:15– 8:30 pm</i>	<i>Final Remarks and Giveaways</i>

● Introductions and Quick Hello

1. **Name**
2. **Company**
3. **What Microsoft Project area are you looking for help with?**

President	Jacques Goupil, PMP, MCP, MCTS, V-TSP, CIE President - PPM Works, Inc.	Jacques.Goupil@ppmworks.com www.ppmworks.com
Director of Marketing	Jan Wells, PMP	janwellspmp@comcast.net
Secretary	Mark Wells, MCTS, PMP	mark.wells.2.ctr@us.af.mil
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MPUG Northeast Liaison & Membership Director	John Riopel, PMP, MCP, MCTS President - PM Providers	jriopel@pm-providers.com www.pm-providers.com
Director of Special Projects	Matthew T, Davis, PMP, CSM, MCP EPM Consultant - Microsoft	matttdavis@comcast.net

Attendee List

William R
William b
John R
Marie G
James R
Jacques G
John B
Steven L
Doug P
Mark W
mike s
John B
Vern V
roomi r
Ronald A
Nadim D
Diane M

←

● Announcements

- Past Presentations are now on <http://boston.mpug.com/>
- Claiming PDUs: <http://boston.mpug.com/2015/06/03/claim-you-pdus-boston-mpug/>
- Join the MPUG Boston LinkedIn Group!!! Search **MPUG Boston**
- Project 2016 in Public beta for more information: <http://ppmworks.com/project-2016-preview/>

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Where Project Managers and Microsoft® Meet

Boston Home


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If you'd like to contact the Boston Chapter directly please use the Chapter Board link and contact one of our Chapter Board Members!

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Boston

Chapter Officers
President: Jacques Goupil, PMP, MCP, MPUG Certification Instructor
Marketing Director: Jan Wells, PMP
Director of Membership: John Riopel, MCP, MCTS, PMP
Director of Community Relations: Ed Yee, PMP
Chapter Secretary: Mark Wells, PMP
Director of Special Projects (Past President): Matthew T. Davis, PMP, MCITP

Upcoming Chapter Events
Boston: It's All about Resources!



● MPUG Boston 2015 Meeting Dates

- Meetings are scheduled the **First Wednesday of the month** and will be held at **Constant Contact in Waltham**

Wednesday, August 5th

Wednesday, September 2nd

Wednesday, October 7th

Wednesday, November 4th

Wednesday, December 2nd

Wednesday, January 6th

Wednesday, February 3rd

Wednesday, March 2nd

Wednesday, April 6th

Wednesday, May 4th

Wednesday, June 1st

Location:

1601 Trapelo Road, Waltham, MA

Exit 28 off 1-95 South



● Call for Presenters

Why:

- Share your knowledge with your peers
- Receive PDUs
- Give back to your Project community

What:

1. 10 – 15 minute presentation (As part of the ‘How Project Saved Me’ session. September 2nd we are looking for a 3-4 presenters)
2. Present your own full-length topic (45 minutes)

When: The following sessions are available

- *Wednesday, September 2nd*
- Wednesday, January 6th
- Wednesday, February 3rd
- Wednesday, March 2nd

MPUG Boston Upcoming Events

Date	Topic	Speaker
Wednesday, September 3	Member Showcase: How Project Saved Me <ul style="list-style-type: none">4 fast moving sessions will provide you with tips and tricks/live-saving methods/lessons learned	Mark Wells, TBD1, TBD2, Vern Valero, Jacques Goupil (four 20 minute topics)
Wednesday, October 7	Statusing and Capturing Project Updates <ul style="list-style-type: none">Are you managing projects? We could all use some tips to be more efficient. Come learn and share your time-saving tips.	Jacques Goupil, MCTS, PMP
Wednesday, November 4	Project Tips <ul style="list-style-type: none">Including comparing projects, exporting/importing project data, custom views, and more.	George Borhegyi, MCTS, PMP
Wednesday, December 2	Critical Path <ul style="list-style-type: none">Understanding Critical Path, project settings, and options for schedule updates.	Vern Valero

Local PMI/IIBA Chapter Upcoming Meetings

PMI Central Mass Chapter – June 9, 2015 – Chapter Meeting

Topic / Speaker: “Maximizing Your Impact: Creative vs. Reactive Leadership” / Marie Bankuti

Location: Doubletree Hotel, 5400 Computer Drive, Westborough, MA

PMI Ocean State Chapter – June 10, 2015 – Chapter Meeting

Topic / Speaker: “Mastering the Complexities of Global Project Management” / Mark Hehl

Location: Salve Regina University, Newport, RI

IIBA Greater Boston Chapter – June 11, 2015 – Chapter Meeting

Topic / Speaker: TBD

Location: Sun Life Learning Center, 112 Worcester St, Wellesley Hills, MA

PMI NH Chapter – June 17, 2015 – Chapter Meeting

Topic / Speaker: “The Duh! Approach to Management and Supervision” / Gerri King

Location: Portsmouth Country Club, Greenland, NH

PMI Mass Bay Chapter – June 18, 2015 – Chapter Meeting

Topic / Speaker: “Global Cafe/Facilitated Networking Event”

Location: Sheraton Four Points Hotel and Conference Center, Norwood, MA



Microsoft Project Custom Formulas & More!

Boston MPUG
August 5th, 2015

John Riopel, PMP, MCP, MCTS

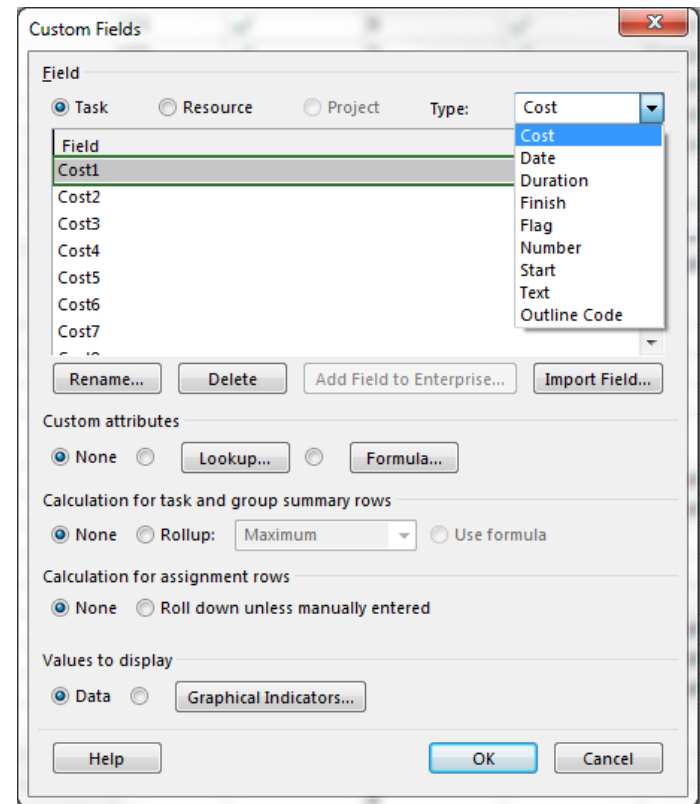


● Agenda

- Should I use custom text, date, number, etc. field?
- How do I go about building a formula?
- Will my formula export data that can be conditionally formatted?
- Where is my formula and graphical indicators stored?

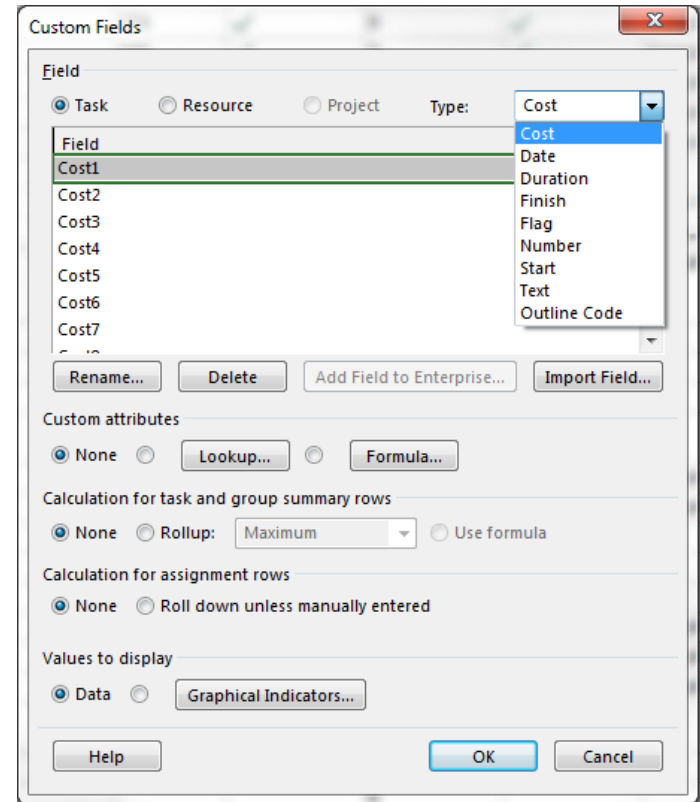
● Microsoft Project Custom Fields

- Select the data type that is best for the type of data that you will return.
- Cost fields will return dollars, Number field will return numbers, etc.
- Best practice: Insert the column, create the formula, return data to validate how the data is returned before doing the graphics.



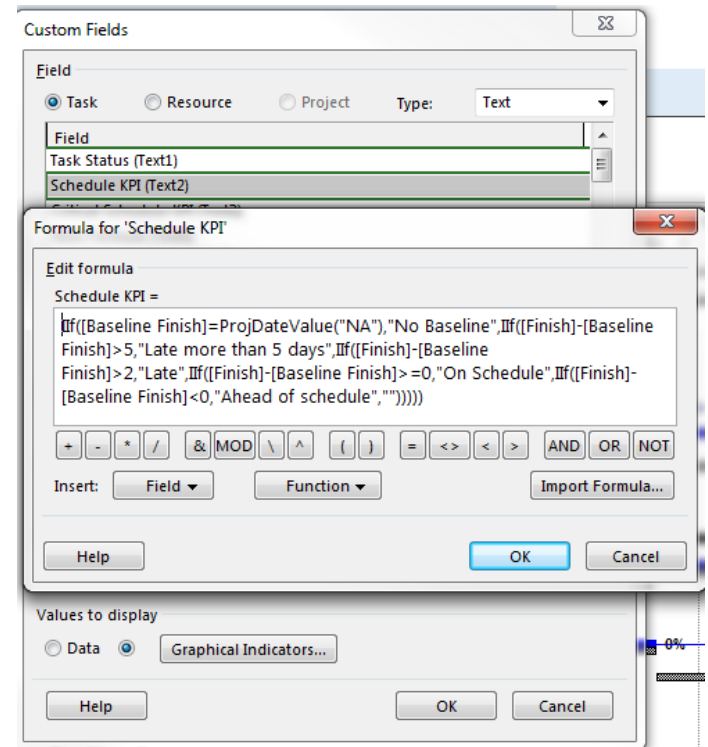
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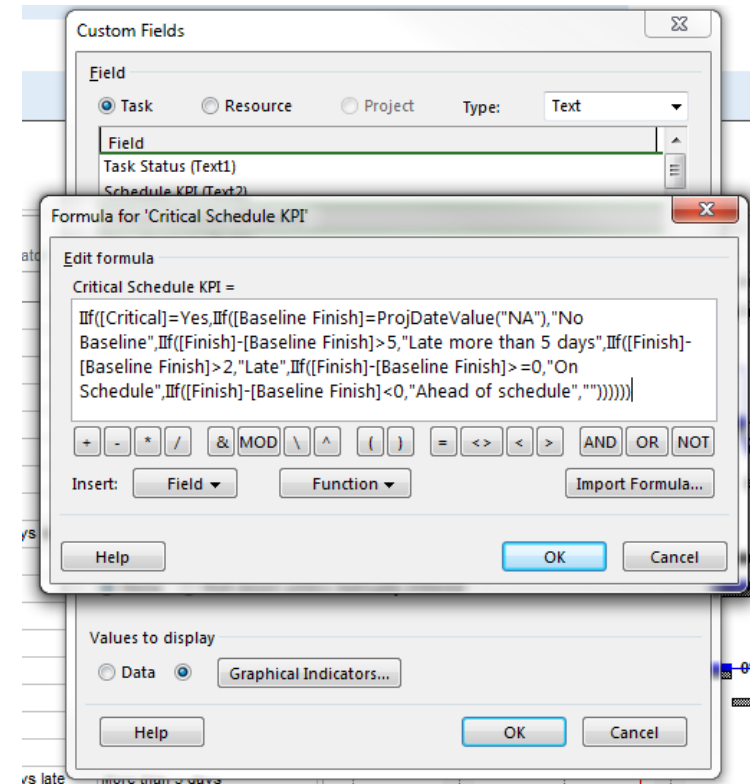
● Schedule KPI

- Select a Text field and in the formula enter:
- `IIf([Baseline Finish]=ProjDateValue("NA"),"No Baseline",IIf([Finish]-[Baseline Finish]>5,"Late more than 5 days",IIf([Finish]-[Baseline Finish]>2,"Late",IIf([Finish]-[Baseline Finish]>=0,"On Schedule",IIf([Finish]-[Baseline Finish]<0,"Ahead of schedule",""]))))))`
- This formula checks to see in the baseline has been saved and it will equal NA, then it checks the difference between the current finish and the baseline finish to see how many days of variance.



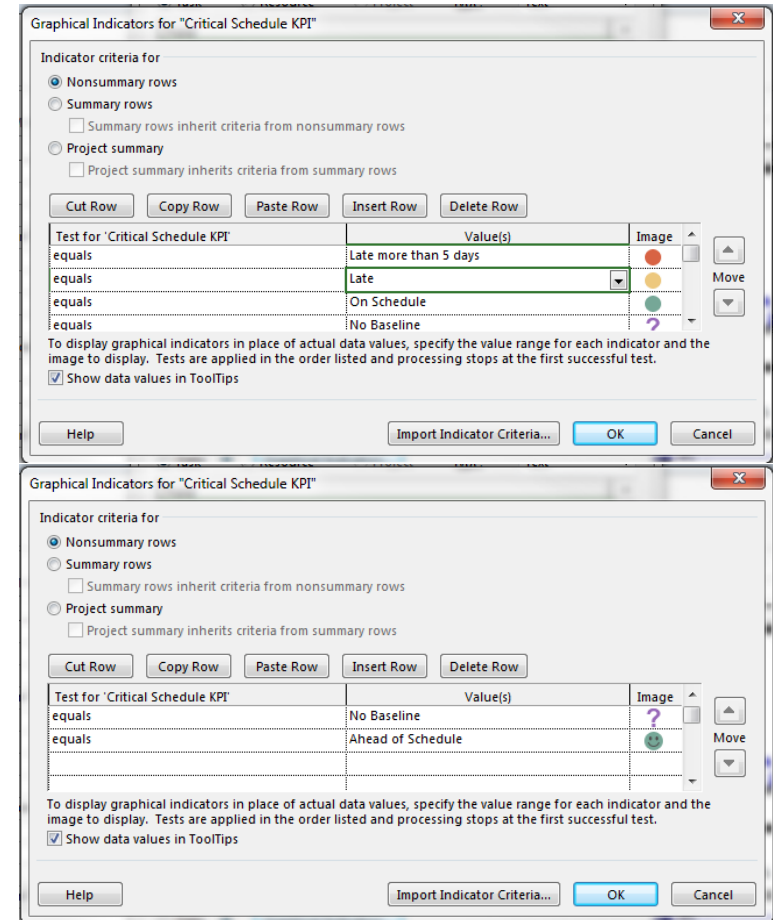
● Critical Tasks Schedule KPI

- Select a Text field and in the formula enter:
- `If([Critical]=Yes,If([Baseline Finish]=ProjDateValue("NA"),"No Baseline",If([Finish]-[Baseline Finish]>5,"Late more than 5 days",If([Finish]-[Baseline Finish]>2,"Late",If([Finish]-[Baseline Finish]>=0,"On Schedule",If([Finish]-[Baseline Finish]<0,"Ahead of schedule",""]))))))`
- This formula expands on the previous example by checking to see if the task is critical first, then proceeds with the other tests.



● Graphical Indicators

- Once the data has been returned and meets the criteria in the formula, set the tests for each result:
- Non – Summary (Task level), Summaries or Project,
- Summary (Level 0)



● Demo

● Visual Reporting

In this example use:

- Select New Template, Task Usage
- Using the Field picker I have added in the Schedule KPI formula and a manual formula Task Status.
- **Note:** If you use a custom formula, it can not be a pivot option, it is a field property only

Book1 - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins PowerPivot QuickBooks Options Design

From Access From Web From Other Text Sources Get External Data Existing Connections Refresh All Properties Connections Sort Filter Clear Filter Sort & Filter Text to Columns Remove Duplicates Data Validation Consolidate What-If Analysis Group Ungroup Subtotal Show Detail Hide Detail Outline

D13 On Schedule

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
					Year	Quarter			Week										
					2013											Grand Total			
					Q1														
					Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14							
1	Work																		
2																			
3																			
4	Task	Task 1	Task 2	Schedule KPI	Task Status														
5		MPUG Demo			Late more than 5 days	NULL	0	0	0	0	0	0	0	0	0	0	0	0	0
6		Phase 1			Phase 1	No Baseline	As Planned	0	0	0	0	0	0	0	0	0	0	0	0
7					Task 1	On Schedule	Complete	8	8	0	0	0	0	0	0	0	0	0	16
8					Task 2	On Schedule	Issues	0	24	0	0	0	0	0	0	0	0	0	24
9					Milestone 1	On Schedule	As Planned	0	0	0	0	0	0	0	0	0	0	0	0
10					Task 3	On Schedule	As Planned	0	8	32	8	0	0	0	0	0	0	0	40
11					Task 4	Late more than 5 days	Not Needed	0	8	8	0	0	0	0	0	0	0	0	16
12					Task 5	On Schedule	Not Needed	0	0	0	24	0	0	0	0	0	0	0	24
13					Task 6	On Schedule	As Planned	0	0	0	8	40	0	0	0	0	0	0	48
14					Milestone 2	On Schedule	As Planned	0	0	0	0	0	0	0	0	0	0	0	0
15					Phase 2	Phase 2	No Baseline	As Planned	0	0	0	0	0	0	0	0	0	0	0
16					Task 7	On Schedule	On Hold	0	8	40	8	0	0	0	0	0	0	0	56
17					Task 8	On Schedule	As Planned	0	0	0	8	0	0	0	0	0	0	0	8
18					Milestone 3	On Schedule	As Planned	0	0	0	0	0	0	0	0	0	0	0	0
19					Task 9	On Schedule	Issues	0	8	24	0	0	0	0	0	0	0	0	32
20					Task 10	Late more than 5 days	On Hold	0	0	0	0	40	8	0	0	0	0	0	48
21					Task 11	Late more than 5 days	On Hold	0	0	0	0	32	40	0	0	0	0	0	72
22					Task 12	Late more than 5 days	Issues	0	0	0	0	0	0	24	24	0	0	0	48
23					Milestone 4	Late more than 5 days	As Planned	0	0	0	0	0	0	0	0	0	0	0	0
24	Grand Total						8	56	104	56	80	40	40	24	400				

PivotTable Field List

Choose fields to add to report:

Values

- ☐ Actual Cost
- ☐ Actual OverTime Work
- ☐ Actual Work
- ☐ Baseline Budget Cost
- ☐ Baseline Budget Work
- ☐ Budget Cost
- ☐ Budget Work
- ☐ Cost
- ☐ Cumulative Cost
- ☐ Cumulative Work
- ☐ Fixed Cost
- ☐ OverTime Work
- ☐ Regular Work
- ☒ Work

Task Status

- ☒ Task Status

Drag fields between areas below:

Report Filter

Column Labels

Weekly Calen...

Row Labels

● Demo

● Break-out Sessions & Refreshments





Questions?

● Evaluations Please!

- Evaluation URL will be sent to registered attendees from MPUG Global.
- Please complete! This helps the Boston Chapter!

● Claim PDU's for this Webcast on PMI.org

- Go to PMI.com and use Activity code –
mpugboston080515
- You may claim 1.0 PDUs for this three hour of the Cert Series.
- Assistance to claim your PDU's
<http://boston.mpug.com/2015/06/03/claim-you-pdus-boston-mpug/>



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