

**99 Tricks and Traps
for
Microsoft® Project 365 and 2021**

**A Casual User Guide Including
2019, 2016 and 2013**

By

Paul E Harris

of

Eastwood Harris Pty Ltd

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AUTHOR AND PUBLISHER

Paul E Harris
Eastwood Harris Pty Ltd
PO Box 4032
Doncaster Heights 3109
Victoria
Australia
harrispe@eh.com.au
<http://www.eh.com.au>
Tel: +61 (0)4 1118 7701

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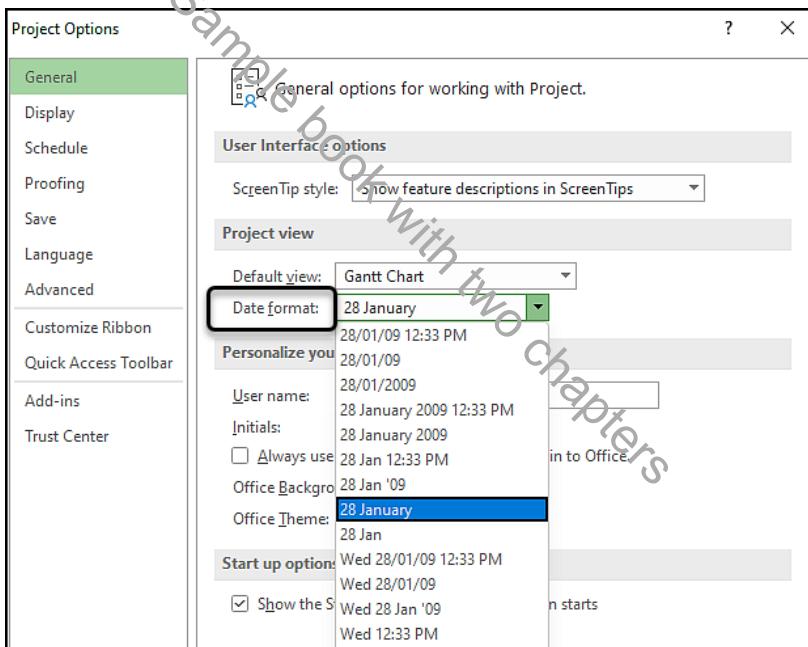
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5 MAKING IT LOOK RIGHT

5.1 Date Format Dangers

There is often confusion on international projects between the numerical US date style (mmddyy) and the numerical European date style (ddmmyy). For example, in the United States 020719 is read as 07 Feb '19, and in many other countries as 02 Jul '19. Consider adopting the ddmmmyy style, **06 Jan '09** or mmmddyy style, **Jan 06 '09** to avoid expensive litigation when dates are misunderstood.

Select **File, Options** to display the **Options** form and select the **General** tab **Date format**:

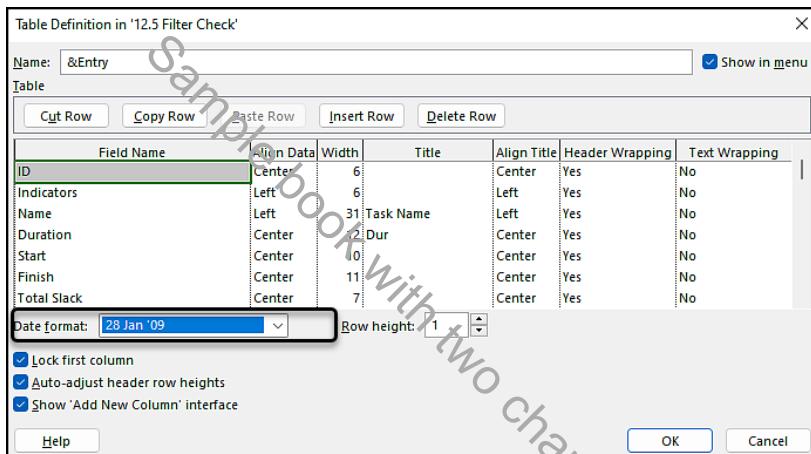


This option selects the display style of the dates for all projects. The date format options available will be dependent on your system default settings. You may adjust your system date format under the **Control Panel, Regional and Language Options**.

5.2 Preventing the Date Format from Changing on Other Computers

The date format selected in the **File, Options, General** tab applies to all projects opened on one computer. Some projects may be required to display the day and time format and others day and month, so you have to keep changing the format each time you open a different project.

If you are in this situation, you may override the date format selected in the **File, Options, General** tab by a date format selected in a **View, Data, Tables, More Tables...** form:



Each project could have its own set of tables all with their own project-specific date format.

When you send this project to someone else, they will have a better chance of seeing the same date format as you especially if their **Control Panel, Regional and Language Options** are the same as yours.

5.3 *The Smart Way to Create Views*

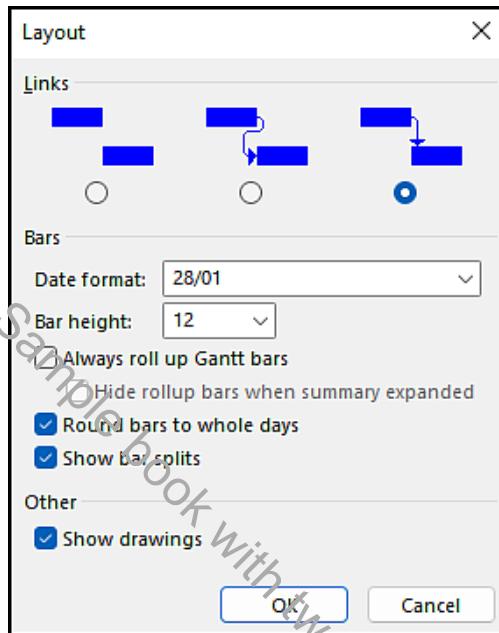
A single Gantt Chart View is made from a Gantt Screen and includes a Table, an optional Group and an optional Filter. A View also holds the Bar formatting and Print settings.

If your project requires multiple but similar Views, for example, headers and footers may need to contain the same print settings and bar formatting consistent, then the following process is recommended:

- ❖ Each View should have a unique name. This name should be used for the Table, Group and Filter names associated with the View, so each view has its own unique Table, Filter and Group with the same name.
- ❖ Create the Tables, Filters and Groups for each View.
- ❖ Create the first View and make sure the Bar formatting and the Print settings are correct.
- ❖ The uniquely named Tables, Groups and Filters should not be displayed in the menus to avoid their inadvertent application and corruption.
- ❖ The print preview Header, Footer and Legend should read all the text data from the **File, Info, Project Information, Advanced Properties** form. Thus, a change to the header or footer text can be made in one place for all Views, the **File, Info, Project Information, Advanced Properties** form.
- ❖ Ensure that you have hidden all the bars that you do not want displayed in the Legend, by placing an “*” in front of the bar name in the **Bars** form. See Para 6.5.
- ❖ Create new Views by copying the first View only after it has been checked, double-checked, and checked again.

5.4 Bar Formatting

Select **Gantt Chart Format**, **Format**, **Layout** to open the **Layout** form, which has some interesting features:



5.4.1 Bar Date Format

The **Bar Date format** option sets the format for dates displayed on bars only.

The option to display dates on:

- ❖ One or more selected bars is made using the **Gantt Chart Format**, **Bar Styles**, **Format**, **Bar** or
- ❖ On all bars with the **Gantt Chart Format**, **Bar Styles**, **Format**, **Bar Styles** form.

5.4.2 Bar Heights

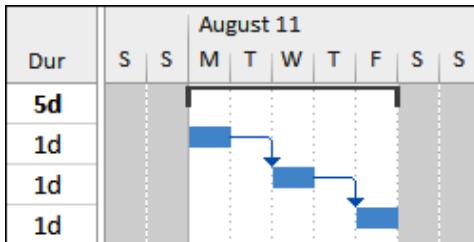
The **Bar height**: option sets the height of all the bars.

Individual bars may be assigned different heights by selecting a bar shape in the styles form.

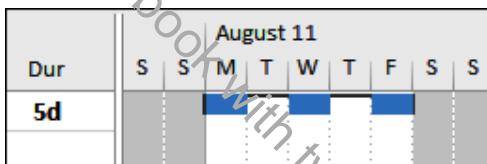
5.4.3 Always Roll Up Gantt Bars

Always roll up Gantt bars and **Hide rollup bars when summary expanded** works as follows:

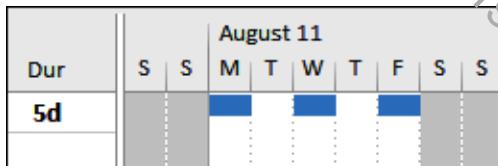
- ❖ Tasks before roll up:



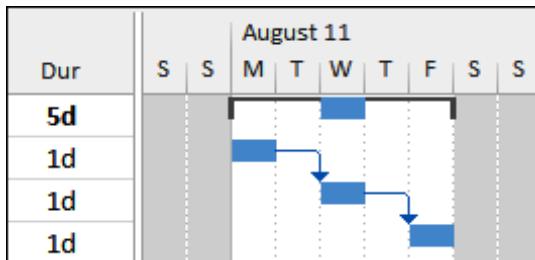
- ❖ Tasks with **Always roll up Gantt bars** checked and **Hide rollup bars when summary expanded** unchecked, results in both Summary and Detailed tasks displayed in the Bar Chart when rolled up:



- ❖ Tasks with both **Always roll up Gantt bars** and **Hide rollup bars when summary expanded** checked, results in the Summary Task bar being hidden when the Detailed Tasks are rolled up:



- An individual bar may be rolled up to a summary task using the **Rollup** option in the **Task Information** form, **General** tab when **Always roll up Gantt bars** options are unchecked.



5.4.4 Round Bars to Whole Days

The **Round bars to whole days**: is used to make it easier to see short duration bars on a long duration schedule:

- When this option is unchecked, the length of the task will be shown in proportion to the total number of hours worked per day over the 24-hour time span. For example, an 8-hour working duration bar is shown below:



- When this option is checked, the task bar is often displayed and spanned over the whole day irrespective of calendar working time:



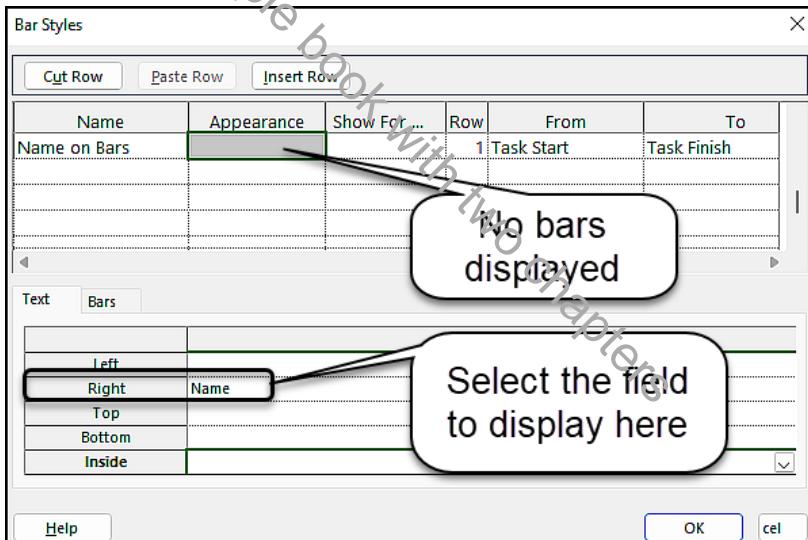
5.5 Putting Text on Bars

5.5.1 Placing a Single Field on Bars

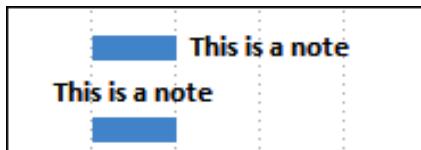
A single field may be placed on all bars using the **Gantt Chart Format**, **Bar Styles**, **Format**, **Bar** form or selected bars using the **Gantt Chart Format**, **Bar Styles**, **Format**, **Bar Styles** form and the **Font Size** is specified in the **Text Styles** form.

When adding a single field to all bars it is best to avoid adding the field to multiple bars because it is time consuming and takes a long time to remove the text.

It is better to create a single bar that does not display any bar formatting (a blank bar) and adding the Text field to this bar:



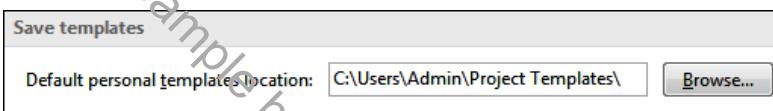
Note: The length of the Bar Chart may be reduced by placing the text on top of the bar instead of the end:



9.3 Microsoft Project Template Changes

Microsoft Project 365, 2021, 2019, 2016 and 2013 templates operate differently to earlier versions of Microsoft Project and there are some important changes that need to be understood by users of earlier versions of Microsoft Project.

- ❖ **Templates** that are saved on your computer are now titled **Personal Templates** in Microsoft Project 365, 2021, 2019, 2016 and 2013,
- ❖ A default location for your personal templates needs to be created and your software mapped to this location before the **Personal Templates** function will operate:



- ❖ Select **File, Options, Save** and set your **Default personal templates location**: here,
- ❖ At this point in time **Personal Templates** may now be saved and used to create projects.

Note: To use **Personal Templates** you **MUST** set your Personal directory in **File, Options, Save**.

9.4 Understanding Templates

A template is a complete project that is saved and then copied in the process of creating a new project.

- ❖ ***.mpt** file format is used for saving Microsoft Project **Personal Templates**.
- ❖ The default location for **Personal Templates** is set in the **File, Options, Save** tab, **Save templates** section.

- ❖ Select **File, New** to open the start-up **Task Pane**. There are several options for template locations:
 - **FEATURED**, this provides a number of sample templates and the ability to search for available online templates.
 - **PERSONAL**, this will allow you to open templates on your computer. As mentioned earlier, a Template directory must be specified first for this option to become available.
- ❖ Organizational templates may be accessed by:
 - Allowing people to copy the organizational templates from a corporate location, or receive them by email, and save them on the local drive. This process is suitable when the users do not always have a network connection.
 - Mapping the **User templates** directory to a location on a corporate network drive.

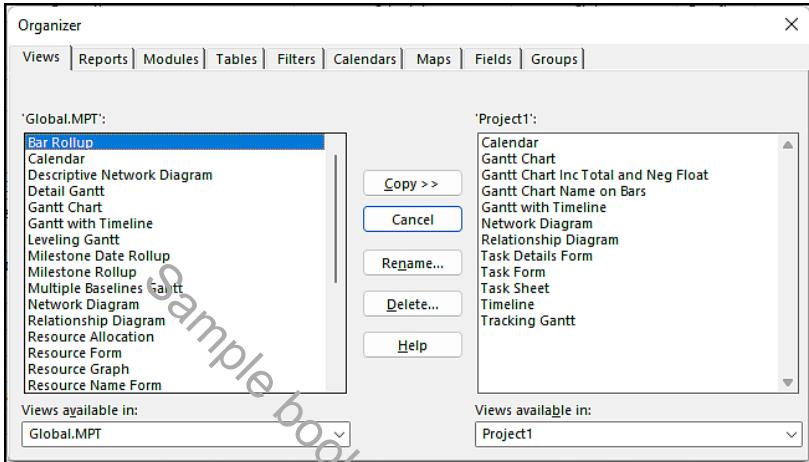
9.5 Eastwood Harris Template

A Microsoft Project template in ***.mpt** format may be downloaded from the Eastwood Harris web site at from the www.eh.com.au, **Software & Downloads** page that has a number of the issues with Microsoft Project defaults and other setting resolved. The changes to the **Global.mpt** default settings are listed on the web site.

You may wish to download this file, open it and save it as a **Personal Template** and use this file instead of the **Blank Project** option as it has some formatting issues resolved.

9.6 Copying Views, Tables and Filters

As part of creating a Template or working on a project you may wish to bring in **Views, Tables or Filters** from an existing project.



The **Organizer** function is used to copy information between projects or to update the **Global.mpt**.

- ❖ Select **File, Info, Organizer** to open the **Organizer** form.
- ❖ The projects you want to copy settings to and from will have to be opened in order to copy data from one schedule to another, except for the **Global.mpt** project.
- ❖ The **Organizer** function is used for renaming and deleting most items such as **Tables**, **Views** and **Calendars**.
- ❖ The two tabs with titles that are not self-explanatory are:
 - **Maps** – These are predefined tables for exporting data, and
 - **Modules** – These are Visual Basic Macros.

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