99 Tricks and Traps for Microsoft® Project 365 and 2021

A Casual User Guide Including 2019, 2016 and 2013

Sample book with two chapters

By

Paul E Harris

of

Eastwood Harris Pty Ltd

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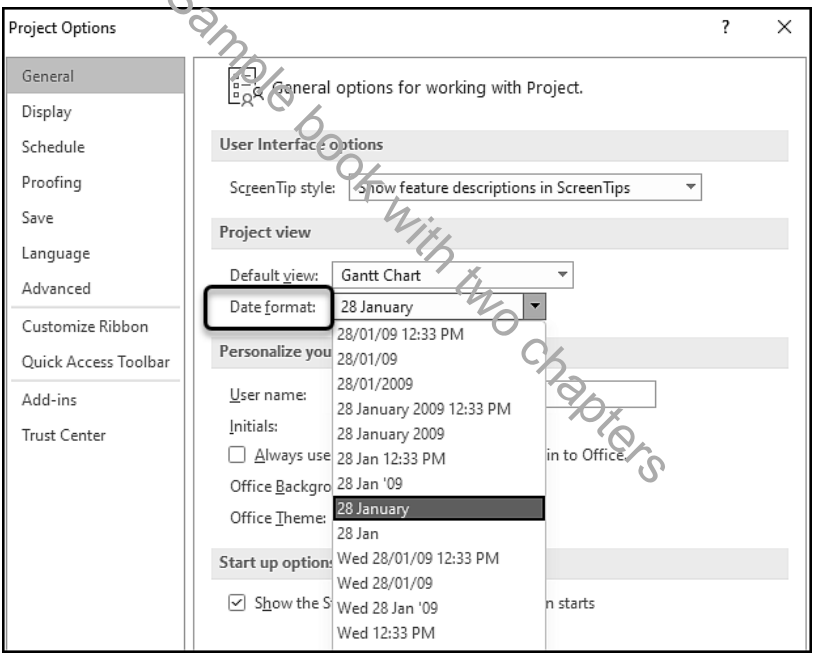
5 MAKING IT LOOK RIGHT

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:**:



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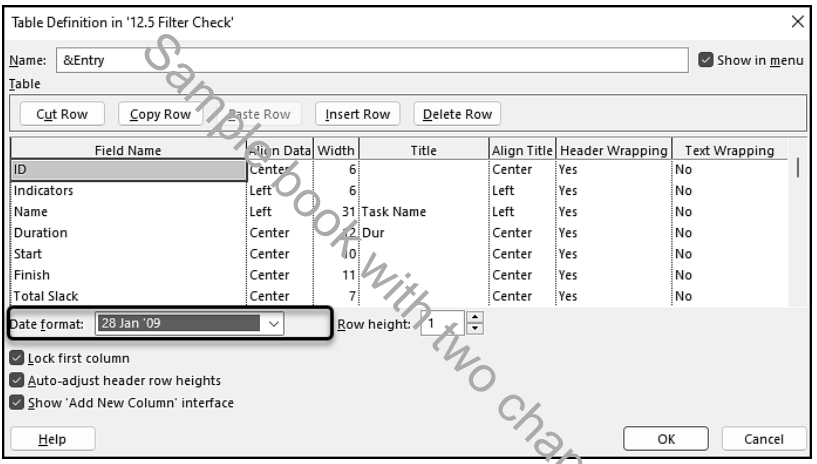
This option selects the display style of the dates for all projects. The date format options available will be dependent on your system default settings. You may adjust your system date format under the **Control Panel**, **Regional and Language Options**.

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:



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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.

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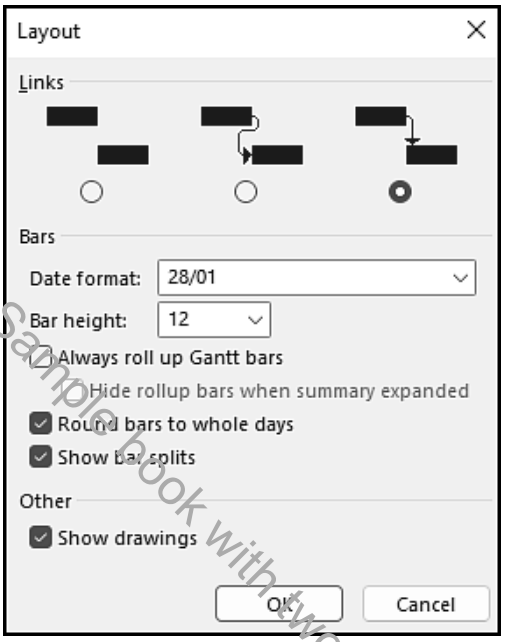
5.4 Bar Formatting

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



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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

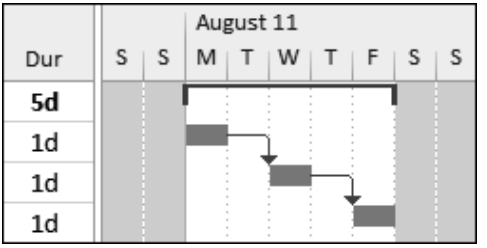
The **Bar height:** option sets the height of all the bars.

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

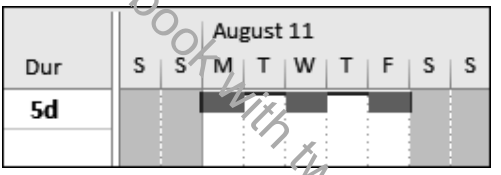
5.4.3 Always Roll Up Gantt Bars

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

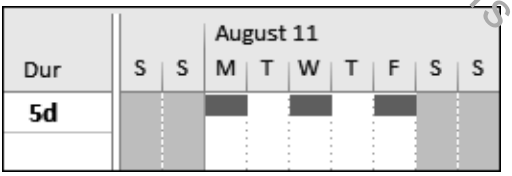
- Tasks before roll up:



- 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:



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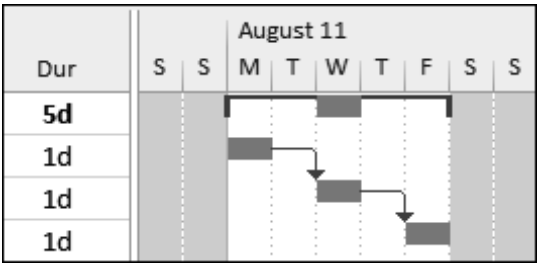
- An individual bar may be rolled up to a summary task using the **Rollup** option in the **Task Information** form, **General** tab when **Always roll up Gantt bars** options are unchecked.

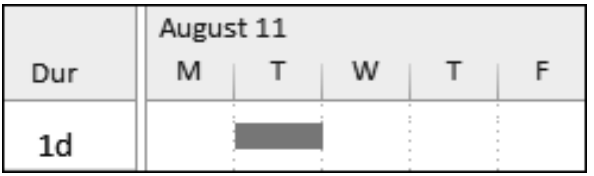


5.4.4 Round Bars to Whole Days

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:



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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:

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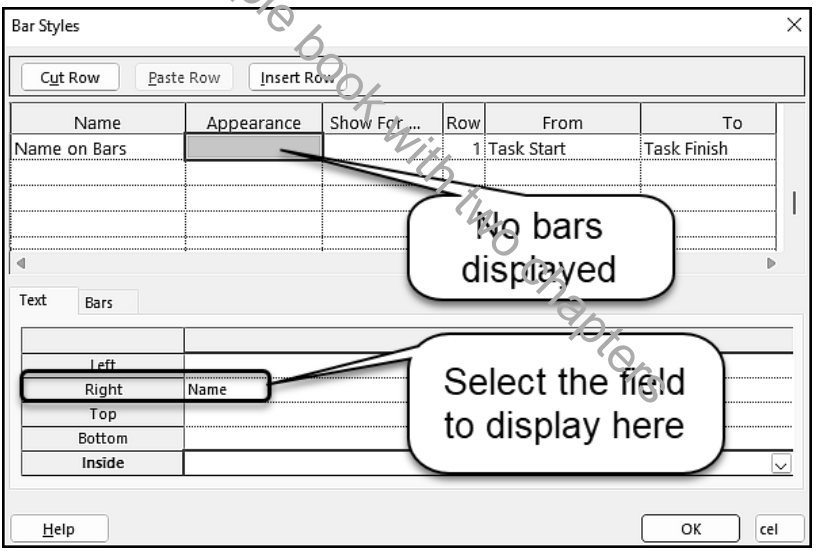
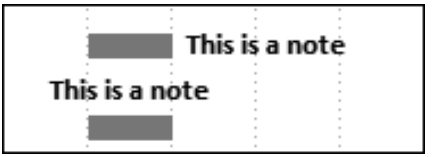


Note: The length of the Bar Chart may be reduced by placing the text on top of the bar instead of the end:



8.2 Which Baseline Should Be Used?

After a project has progressed it may be necessary to set a new Baseline.

This may occur when the scope of a project has changed and a new baseline is required to measure progress against, but at the same time you may also want to keep a copy of the original baseline.

A new Baseline may be used to display the effect of scope changes on a plan by setting a Baseline, adding the scope change and comparing the revised schedule with the Baseline.

The **Baseline** data may be reviewed in some Views such as the **Task Details Form**, in columns and on the Bar Chart. You will be able to display the **Baseline 1** to **10** and **Interim Plan** dates and durations in columns and as bars on the Gantt Chart but not in the forms. **Baseline 1** to **10** also do not have variance columns.

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Therefore, it is recommended that the current baseline be saved as the **Baseline** since the data is more accessible from the **Baseline** than **Baseline 1** to **10**. Previous baselines should be copied to **Baselines 1** to **10** and preserved as a record.

Another benefit of using **Baseline** is that it has **Variance Start**, **Variance Finish** and **Variance Duration** columns that are not available with other Baselines, but may be calculated using a Calculated Field.

Note: The downside of using one of the Baselines 1 to 10 is that it is not possible to easily identify what the Baseline was set for as there is no inbuilt way of naming these baselines. One option is the record notes on the baselines in the **Advanced Properties** form, **Comments:** section.

8.3 Principles of Updating a Program

Ideally, scheduling software has one current **Data Date** and the function of it is to:

- Separate the completed parts of tasks from incomplete parts of tasks,
- Calculate or record all costs and hours to date before the **Data Date**, and to forecast costs and hours to go after the **Data Date**,
- Calculate the **Finish Date** of an in-progress task from the **Data Date** plus the **Remaining Duration** over the **Task Calendar**.

Therefore, in a properly updated Microsoft Project program, the **Status Date** should be used as the **Data Date** and not the Microsoft Project **Current Date** field because the **Current Date** field changes to today's date each time a file is opened:

- **Completed** tasks would have Actual Start and Actual Finish Dates in the past.
- **In progress** tasks would have the Actual Start and Actual Duration in the past, and the Early Finish and Remaining Duration in the Future.
- **Unstarted** tasks should be in the future.

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Note: In Microsoft Project it is relatively simple to be in a situation where you have complete or in-progress tasks with start dates later than the **Status Date**, and/or incomplete or un-started tasks with a finish date earlier than the **Status Date**. This is an unrealistic situation, which is more difficult to achieve in other scheduling software packages. Care should be taken to avoid this situation and checks made after the schedule has been updated.

Note: The Eastwood Harris template found at the **www.eh.com.au** website **Software & Downloads** page has a **Tracking Table** with an additional column showing what is required to do to ensure the tasks are correctly updated. This is created in Text 30 as a Calculated Field.

8.4 In-progress Task Finish Date Calculation

Many planning and scheduling packages calculate a task Finish Date from the Data Date plus the Remaining Duration over the Task or Resource Calendar, whichever is applicable.

Unlike most planning and scheduling software packages, Microsoft Project ignores the **Current Date** and **Status Date** when calculating an in-progress task. It calculates a task **Finish Date** from the **Actual Start Date** plus the **Duration** and effectively ignores the **Remaining Duration** for normal progress calculation.

There is an in-built proportional link between **Duration**, % **Complete, Actual Duration** and **Remaining Duration**. It is not possible to unlink these fields (as in other scheduling software) and therefore not possible to enter the **Remaining Duration** independently of the **% Complete**.

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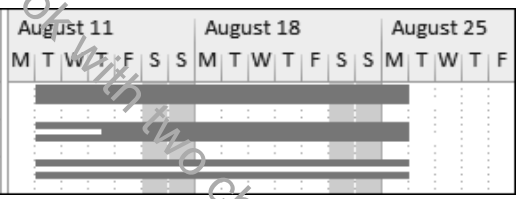
Dur	% Comp.	Act. Dur.	Rem. Dur.
10d	0%	0d	10d
10d	25%	2.5d	7.5d
10d	100%	10d	0d



Thus **% Complete** field is the **% Duration** of a task.

8.5 Understanding the % Completes

Microsoft Project has three inbuilt % completes:

- **% Complete** – This is **the Duration % Complete**.
  - In **Detailed** Tasks the **Duration**, **Actual Duration**, **Remaining Duration** and **% Complete** are linked and may not be unlinked,
  - The **% Complete** is calculated by dividing the **Actual Duration** by the **Duration**.
  - In **Summary Tasks** it is calculated by the sum of the **Detailed Tasks Actual Durations** and dividing by the sum of the **Detailed Tasks Durations**.
  - A **Milestone** assigned a 100% Complete will not always contribute to the Summary % Complete:

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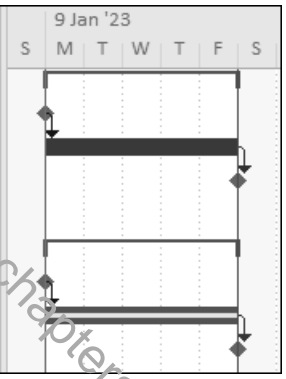
	ⓘ	Task Name	Dur	% Complete
1		**Summary**	**5d**	**0%**
2	✓	A	0d	100%
3		B	5d	0%
4		C	0d	0%
5				
6		**Summary**	**5d**	**99%**
7	✓	A	0d	100%
8	✓	B	5d	100%
9		C	0d	0%

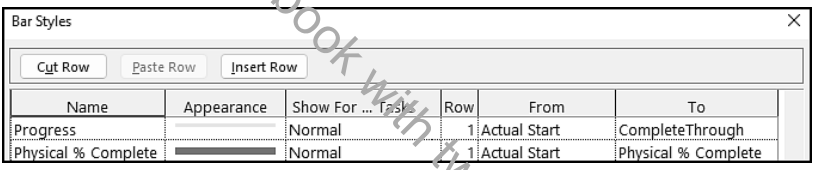


- % Work – This represents the amount of work completed:
  - The **Work**, **Actual Work**, **Remaining Work**, **Work** and **% Work** are linked and may not be unlinked,
  - The **% Work** is calculated by dividing the **Actual Work** by the **Work**.
  - The **% Work** and **% Complete** are normally linked, thus a change in the **% Complete** will change the **% Work**. Thus, the Actual Work is updated automatically.

- The **% Work** and **% Complete** are unlinked in the **Updating task status updates resource status** option in the **File**, **Options**, **Schedule** tab. When this is unchecked, then the **Actual Work** and **Remaining Work** may be edited separately from the **Actual Durations** and **Remaining Durations**. This should be unchecked if you wish to enter the actual work from timesheets etc.

❖ **Physical % Complete** – It is useful in the situation when the % complete of completed work is required to be displayed, based on completed deliverables and not durations or labor hours.

- This is independent of durations and work.
- It is not summarized against summary tasks.
- It may be displayed by creating a bar as per below:



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