
Microsoft® Project 2003 Professional



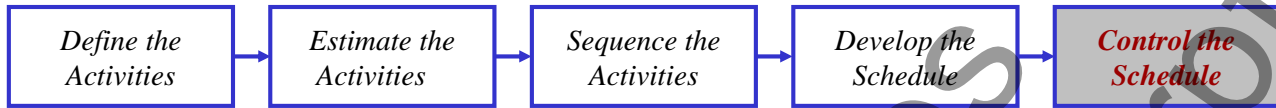
Section 6.0
Tracking Project Progress

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Tracking Project Progress



◆ Schedule Control



Controlling the schedule that is being executed involves:

- ▶ Determining that the schedule has changed
- ▶ Managing the actual changes when and as they occur

In order to **determine** and **manage** the changes to the schedule, you must track the progress against the schedule

Tracking Project Progress



◆ What information is needed to track the progress?

Availability information for each resource

- ▶ Was the resource available as planned?
- ▶ Is the resource going to be available as planned?

Task Schedule Information (Task Duration) for each task

- ▶ When did the work actually start on the task?
- ▶ If the task is complete,
 - ◆ When did it actually finish?
- ▶ If the task is not complete,
 - ◆ How much calendar time has been spent on the task?
 - ◆ How much more calendar time is needed?

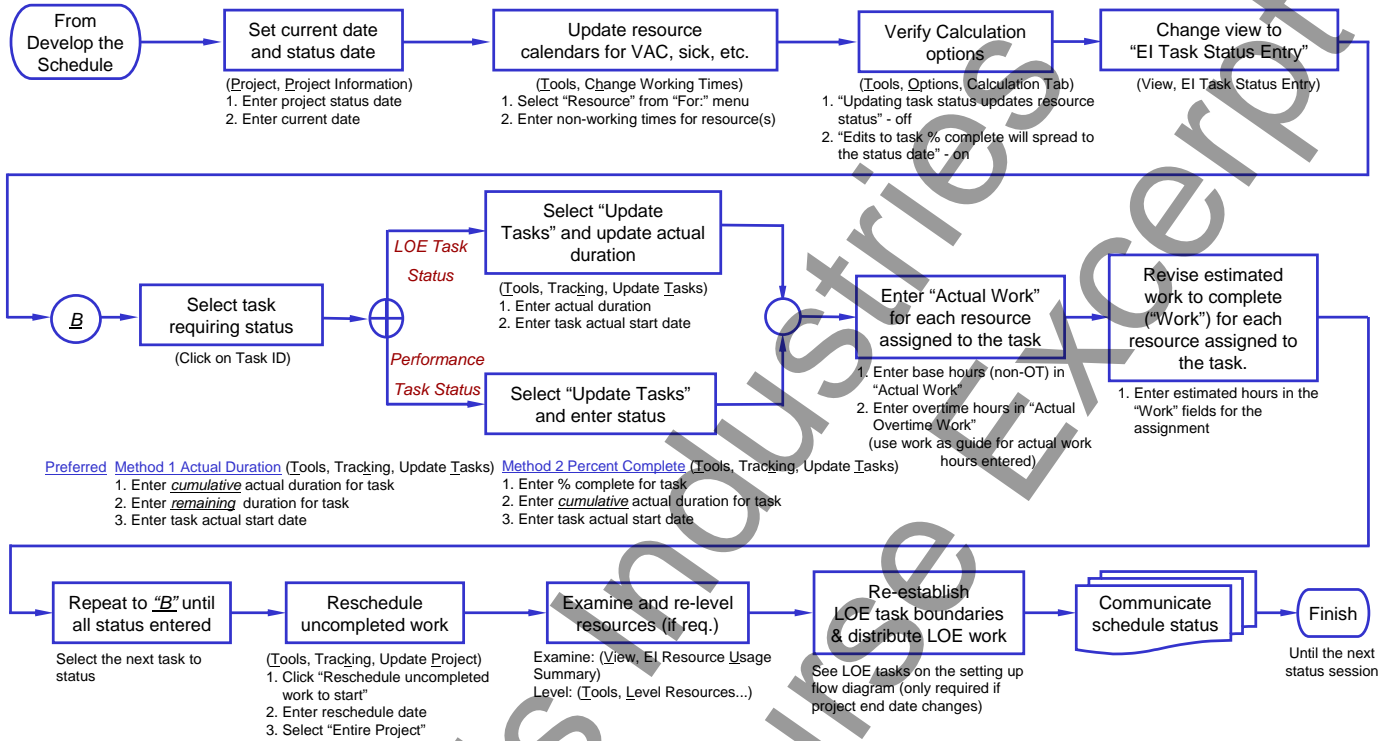
Task Cost Information for each resource for each task

- ▶ How much work was expended on the task by the resource?
- ▶ How much more work is necessary to complete the work by each resource?

Tracking Project Progress



Control the Schedule - Microsoft® Project Process Flow



Tracking Project Progress



◆ Control the Schedule - Process Assumptions

The project tracking process presented in this course is based on some MS Project options changes from the default settings.

The MS Project template file (GLOBAL.MPT) provided by Edwards Industries does incorporate these changes automatically for new schedules or schedules updated using the organizer.

In other schedule files, these option changes would need to be made manually *BEFORE* following this tracking procedure.

Two "Calculation" options must be changed from their default conditions.

- ▶ The "Updating task status updates resource status" option must be turned OFF.
- ▶ The "Edits to the total % complete will be spread to the status date" option must be turned ON.

Tracking Project Progress



Schedule Control - Process Assumptions (cont.)

Turn OFF the “Updating task status updates resource status” option (clear check box).

These options will only operate if the “Updating task status updates resource status” option is turned on.

Click the “Set as Default” to establish these parameters for all NEW projects created.

Turn ON the “Edits to the total % complete will be spread to the status date” option (fill check box).

NOTE: The parameters set in this dialog box only address the individual project being worked on and NEW projects (if “Set as Default” is clicked). These are NOT global changes and will need to be reset for any other existing project files.

Tracking Project Progress



◆ Project Options: Calculation

“Updating task status updates resource status”

- ▶ This option defines whether or not the task status (percent duration complete) is directly tied to the amount of work completed by the resources assigned to the task (percent work).
- ▶ When this option is ON, MS Project will automatically calculate the actual work for the resources assigned to the task when task status is entered.
- ▶ When this option is OFF, you must enter the actual work for the resources and the status of the task.
- ▶ Edwards Industries recommends turning this option OFF.
 - ◆ This provides the most accurate depiction of project costs.

Tracking Project Progress



Project Options: Calculation

“Updating task status updates resource status”

- ▶ Sample Task – 4 weeks in Duration

Calculation options for 'Project1'

Updating task status updates resource status

Move end of completed parts after status date back to status date

And move start of remaining parts back to status date

Move start of remaining parts before status date forward to status date

And move end of completed parts forward to status date



- ▶ With Updating task status updates resource status ON – when “% Complete” of 25% is recorded, the tool automatically recorded actual hours of work.

Task Name	% Complete	% Work Complete	Duration	% Work Complete equals % Complete.
Update Task status updates Resource status - on	25%	25%	320 hrs	

Task Name	Work	Duration	Start	Finish
Update Task status updates F	320 hrs	320 hrs	Mon 1/5/04	Fri 2/27/04
test	320 hrs		Mon 1/5/04	Fri 2/27/04

Details	12/28	1/4	1/11	1/18	1/25	2/1
Base Work						
Work		40h	40h	40h	40h	40h
Act. Work		40h	40h			
Overalloc.						
Base Work						
Work		40h	40h	40h	40h	40h
Act. Work		40h	40h			
Overalloc.						

Actual Hours are automatically recorded by the tool.

Tracking Project Progress



Project Options: Calculation

“Updating task updates resource status”

- ▶ Same Sample Task – 4 weeks in Duration

Calculation options for 'Project1'

- Updating task status updates resource status
- Move end of completed parts after status date back to status date
 - And move start of remaining parts back to status date
- Move start of remaining parts before status date forward to status date
 - And move end of completed parts forward to status date



- ▶ With the Option OFF – when “% Complete” of 25% is recorded, the tool did not automatically record actual hours worked.

Task Name	% Complete	% Work Complete	Duration	January					
3 Update Task Status Updates Resource Status - off	25%	0%	320 hrs	12/28	1/4	1/11	1/18	1/25	2/1

Task Name	Work	Duration	Start	Finish	January					
3 Update Task Status Updates	320 hrs	320 hrs	Mon 1/5/04	Fri 2/27/04	12/28	1/4	1/11	1/18	1/25	2/1
Base Work										
Work					40h	40h	40h	40h	40h	40h
Act. Work										
Overalloc.										
test	320 hrs		Mon 1/5/04	Fri 2/27/04						
Base Work										
Work					40h	40h	40h	40h	40h	40h
Act. Work										
Overalloc.										

Actual Hours are NOT recorded.