

Project Flight Deck

User Manual

Project Status Reporter

Operating Instructions

Operating the plug in is simple: when you are ready to produce the status report, open the .mpp file provided by ProjectFlightDeck, go into your schedule, and run the macro called, ProjStatRptr.

Here are detailed, step-by-step instructions:

1. When you are ready to produce the status report, open the .mpp file provided by ProjectFlightDeck. The file is name, “Project Status Reporter **mmddyy**.mpp, where **mm** = numerical month, **dd** = numerical day, **yy** = numerical year on which the module was released. The .mpp file is the “container” for the macro. Leave the macro open as you proceed through the next steps.
2. Go into the schedule that you want reported—the “target” schedule. The phrase “go into” means either go back into a schedule that you had already opened (re-activate it) or open the schedule anew. The sequence with which the container and the target files are opened is irrelevant. It is only important that both are open at the same time when you want to produce the report.
3. In the target schedule, go to Tools, Macro, Macros. You will observe that one of the macros listed on the left side of the Macros window is called, Project Status Reporter mmddyy.mpp!ProjStatRptr, where mmddyy is the date of the module’s release, as described in step 1. Select that macro by highlighting the name. When you do so, the name appears in the box under the heading, Macro name: .
4. Press the Run key on the upper right side of the Macro window.
5. Follow the prompts, and the report will be produced.

Set Up

The Project Status Reporter enables the Project Manager to control the tasks that are/are not available for reporting. To do so, a Report Flag is used. If the Report Flag is not set, all tasks are available for reporting. Often, the PM wants to limit the tasks that are reported and does not want to re-identify the tasks each time a report is generated. To reduce the burden on the PM in such situations, the tool provides a Report Flag. The PM sets it once, saves the schedule, and does not have to repeat the process. To set the Report Flag, the following steps are required.

1. **Add Report Flag:** Open the target schedule in MS Project. Position the cursor to the first column, right click, select Insert Column. Scroll the drop down list to the Flag fields. Select Flag1 from the drop down list. The column will be added to the schedule with the values defaulted to “No”.
2. **Update Report Flag:** Identify the tasks you want reported. Set the Flag1 field on those tasks to “Yes”.

Once the preparatory steps have been completed, you are in a position to run the macro. With the target schedule open, select Tools, Macro, Macros. Ensure that the PFDStatRpt macro is highlighted. Press Run.

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The plug in prompts for the start and end dates of the reporting period. Edit checks are performed to ensure that the dates provided are within the start and end dates of the project. When they are, the macro opens an Excel file and places the status report in the file.

You can then do final edits on the file, typically word-smithing and deleting entries.

Practice

The Project Status Reporter presents the header with the Project Name from the Project Information stored in the schedule and the Report Start/End Dates from user input via prompts.

The Reporter automatically identifies milestones and reports on all of them in the first detailed section of the report. The plug-in uses the Milestone indicator on each task as the key to identifying if an item belongs in this section. In Project, tasks identified as Milestones can have duration associated with them. This deviates from the widespread notion of a Milestone as having no duration. Because the number of Total Planned Days is displayed on the report, it is easy to identify any Milestone tasks that have duration. The Milestones are automatically sorted by % Complete (0% first, then 100%) and, within that, by date.

All project Milestones are included in the report in order to provide historical perspective on project progress. In practice, Project Managers sometimes remove the oldest Milestones and the ones farthest in future to keep focus on the near term. The PM can easily re-sort the Milestones if a sequence other than the automatic one is desired.

The Accomplishments section contains all the tasks actually completed within the reporting time frame provided by the Project Manager via the prompts. Summary tasks and Milestone tasks are included in this section for sake of completeness. Having all the tasks visible increases the usefulness of the report for schedule analysis purposes. Again, it is customary for PMs to selectively remove tasks from the Accomplishments section of the report, in particular the Summary and the Milestone tasks. The tasks are sorted by Finish Date (the field in the report is, to be precise, the Actual Finish Date).

The Delayed Items section contains all the tasks planned to complete by the end date of the reporting period but that have not completed. Selective removal of Summary and Milestone tasks is common for this section. The tasks are sorted by Finish Date.

The Planned Items section contains all tasks planned to complete in the “look ahead” period. The “look ahead” period is based on the number of future days specified by the Project Manager through one of the prompts. For completeness, Summary and Milestone tasks are included in this section. Their selective removal is common. The tasks are sorted by Finish Date.