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Deadline Status: Traffic Light Indicators

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As discussed in class, I recommend using **Deadlines** versus **Finish No Later Than** Constraints. Why? Because Deadlines are flexible – they do not override Microsoft Project's ability to schedule and calculate a finish date. Some constraints, the inflexible ones, override Projects ability to schedule and calculate new Start and Finish dates which can result in schedule inaccuracies.

Note: Deadlines are set up in the Task Information window on the Advanced Tab and are indicated by an Arrow on the Gantt Chart:

| | 1 | Task Name 🚽 | Duration 🖕 | Start 🗸 | Finish 🗸 | . Deadline | | T F S S | eb 13, '11 M T W T F | Feb 20, '11 S S M T V | Feb 2 |
|---|---|----------------------|------------------|----------------|----------------|----------------------------|--------------------|-----------|-------------------------|--------------------------|-------|
| 1 | | | | | | | | | | | |
| 2 | | Task A | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/25/11 | | | | | \$ |
| 3 | | Task B | 5 days | Mon 2/14/11 | Fri 2/18/11 | Wed 2/23/11 | | | | | ÷ |
| 4 | | Task C | 5 days | Mon 2/14/11 | Fri 2/18/11 | Mon 2/21/11 | | | | | |
| 5 | • | Task D | 5 days | Mon 2/14/11 | Fri 2/18/11 | Thu 2/17/11 | | | с | | |
| 6 | _ | Task E | 5 days | Mon 2/14/11 | Fri 2/18/11 | NA | | | | | |
| | | Task Informatio | on | | | | | <u> </u> | | | |
| | | General Pred | lecessors Reso | urces Advanced | Notes Custom F | Fields | | | | | |
| | | Name: Task | A | | | Du | ration: 5 days 🚔 🛛 | Estimated | | | |
| | | Constrain tas | < | | | | | | | | |
| | | Deadļine: | Fri 2/2 | 5/11 | | | | | | | |
| | | | | | | -13 | | | | | |
| | | Constraint t | yge: As Soc | n As Possible | ▼ Con: | straint da <u>t</u> e: NA | | • | | | |
| | | Task type: | Fixed U | Jnits | - E | Effort driven | | | | | |
| | | Calendar: | None | | ▼ □ 5 | Schedulin <u>a</u> ignores | resource calendars | | | | |
| | | WBS code: | 1 | | | | | | | | |
| | | Earned <u>v</u> alue | e method: | % Complete | • | | | | | | |
| | | Mark task a | as milestone | | | | | | | | |
| | | | | | | | | | | | |
| | | | - | | | | | | | | |
| | | Help | | | | | ОК | Cancel | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

So now that we know we want to use a Deadline for any task that must be completed by a certain date, there's an issue that needs to be addressed. With Deadlines, we only get a warning once we've actually missed one - so that means we constantly have to be reviewing our deadlines to see if any are approaching (See the red warning symbol under the indicator column for Task D above).

One of the tools that I have found useful is to create a Deadline Traffic Light column which displays Green, Yellow, or Red indicators depending on the timing of a task's finish date versus its Deadline date. Take a look at the **Deadline Status** column below, which makes it very easy to monitor approaching (or past) deadlines:

| | 0 | Deadline Status | Task Name 🚽 | Duration 💂 | Start 👻 | Finish 👻 | Deadline 🚽 | TF | = s | Fel S | o 13, M 1 | '11 T W | TF | s s | Feb S | 20, '1 M T | 1 W T | F | S | Feb S | 27, ' M T | 11 W | TF |
|---|---|--------------------|-------------|------------|-------------|-------------|-------------|----|-----|----------|--------------|-------------|----|-----|----------|-----------------|-----------|---|---|----------|----------------|----------|----|
| 1 | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | | ۲ | Task A | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/25/11 | | | | | _ | | | | | | 4 | > | | | | |
| 3 | | 0 | Task B | 5 days | Mon 2/14/11 | Fri 2/18/11 | Wed 2/23/11 | | | | | | | | | | ♣ | | | | | | |
| 4 | | 0 | Task C | 5 days | Mon 2/14/11 | Fri 2/18/11 | Mon 2/21/11 | | | | | | | | | ₽ | | | | | | | |
| 5 | | 0 | Task D | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/18/11 | | | | | | | \$ | | | | | | | | | |
| 6 | | | Task E | 5 days | Mon 2/14/11 | Fri 2/18/11 | NA | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |

Creating the Custom Column for Your Deadline Traffic Light Indicators:

Follow these steps to create your own Deadline Status column:

- 1. Open a project with Tasks that have deadlines, or just use my sample file.
- 2. Open the Custom Fields Window:

2003 / 2007 Users:

Tools > Customize > Fields

2010 Users:

Project > Properties > Custom Fields

3. Rename the "Text1" custom field to "Deadline Status".

Select Text1 and press Rename. Rename the field to "Deadline Status".

| | - | Task Magaz | Duration | Start | Sinish | Dendline | Deadacascasc | | eh 13 '11 | 1 | Eeb 20 '1 | 1 | Feb 27 '11 |
|---|---|------------|------------|-------------------------------|-------------------|-------------------------|----------------|----|-----------|------|-----------|------|------------|
| | 0 | rask wante | buración , | , Start - | riman | • Deaurine • | Fredecessors 🖕 | S | SMT | NTFS | S M T | WTFS | SMTW |
| 1 | | | | | | | | | | | | | |
| 2 | | Task A | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/25/11 | | | - | _ | | 4 | |
| 3 | | Task B | 5 days | Mon 2/14/11 | Fri 2/18/11 | Wed 2/23/11 | | | | | | ۰. | |
| 4 | | Task C | 5 days | Mon 2/14/11 | Fri 2/18/11 | Mon 2/21/11 | | | | | ۰ | | |
| 5 | | Task D | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/18/11 | | | | 4 | | | |
| 6 | | Task E | 5 days | Mon 2/14/11 | Fri 2/18/11 | NA | | | | | | | |
| | | | | | | | | | | | | | |
| | | | 6 | istom Fields | | | | 23 | | | | | |
| | | | | | | | | | 1 | | | | |
| | | | 1 | jeld | | | | | | | | | |
| | | | | Task C R | esource | Project Type: | Text | • | | | | | |
| | | | | Deadine Stat. | is . | | | ^ | | | | | |
| | | | | Pield Deadline Status (Tex | (+1) | | | | | | | | |
| | | | | Text2 | | | | | | | | | |
| | | | | Text3 | | | | | | | | | |
| | | | | Text9 | | | | | | | | | |
| | | | | Text6 | | | | | | | | | |
| | | | | Text7 | | | | - | | | | | |
| | | | | Rename | Delete | Add Field to Enterprise | Import Field | | | | | | |
| | | | | uetom attributes | | | | | | | | | |
| | | | | | ookun 🔍 | Formula | | | | | | | |
| | | | | Tala dation for task on | | | | | | | | | |
| | | | | None Polun | u group summar | y rows | | | | | | | |
| | | | | e man O Kolop | | - O use to | | | | | | | |
| | | | | aculation for assignm | ient rows | | | | | | | | |
| | | | | None C Koll do | witi unitess manu | ally entered | | | | | | | |
| | | | 1 | alues to display | | | | | | | | | |
| | | | | 🗇 Data 💿 🛛 🕞 | aphical Indicator | 'S | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | Help | | C | K Cancel | | | | | | |
| | | | L | | | | | _ | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

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4. Next we need to add a formula which calculates the number of days between a Task's Finish Date and it's Deadline Date:

Make sure Deadline Status (Text1) is still selected and press the Formula button.

| Custom Fields | 23 |
|--|----|
| Eield | |
| © Task © Resource ○ Project Type: Text | • |
| Deadline Status | * |
| Field | |
| Deadline Status (Text1) | |
| Text3 | |
| Text4 | |
| Text5 | |
| Text6 | |
| Text7 | - |
| | _ |
| Rename Delete Add Field to Enterprise Import Field | •• |
| Custom attributes | |
| None CLookup | |
| Calculation for task and group summary rows | |
| None Rollup: O Use formula | |
| Calculation for assignment rows | |
| None O Roll down unless manually entered | |
| Values to display | |
| O Data Graphical Indicators | |
| Help OK Cancel | |

Now add the following formula and press OK:

| Eield | |
|--|---------------------|
| Task C Resource Project | Type: Text 👻 |
| Deadline Status | |
| Deadline Status (Text 1) | |
| Formula for 'Deadline Statur' | 8 |
| Formula for Deadline Status | |
| Edit formula | |
| Deadline Status = | |
| IIf([Deadline]>99999,"None",DateDiff("d",[Fir | ish],[Deadline])) |
| | |
| | |
| | |
| | |
| +-*/ & MOD (^ () | = <> < > AND OR NOT |
| Insert: Field Function | Import Formula |
| | |
| Uala | OK Canad |
| Theip | Cancer |
| Volume to divolute | |
| values to display | |
| Data Graphical Indicators | |
| | |
| | |

IIf([Deadline]>99999,"None",DateDiff("d",[Finish],[Deadline]))

Note: The "iif" in the function above is not a typo, that is the correct spelling.



5. Next we need to update the Green-Yellow-Red Graphical Indicators for this column:

Make sure Deadline Status (Text1) is still selected and press the Graphical Indicators button.

| Custom Fields | |
|--|--|
| Ejeld | |
| Ø Task ⑦ Resource ⑦ Project Type: Text | |
| Deadline Status | |
| Field | |
| Deadline Status (Text1) | |
| Text2 | |
| Tevt4 | |
| Text5 | |
| Text6 | |
| Text7 | |
| | |
| Rename Delete Add Heid to Enterprise Import Heid | |
| Custom attributes | |
| None Lookup | |
| Calculation for task and group summary rows | |
| None Rollup: Solup: Solup: | |
| Calculation for assignment rows | |
| None Roll down unless manually entered | |
| Values to display | |
| Data Graphical Indicators | |
| Help OK Cancel | |

Now update the field with the warning day values and select the desire image.

| Indicator criteria | for | | | - | |
|--------------------|---|---------------------|------------------------------|-------|--------|
| Nonsummari | (10%5 | | | | |
| Summary ro | we let | | | | |
| Summar | rows inherit criteria from nons | ummary rows | | | |
| Project sum | nary | | | | |
| Project s | ummary inherits criteria from si | Immary rows | | | |
| | | | | | |
| Cut Row | Copy Row Paste Ro | w Insert Row | Delete Row | | |
| equals | | | | | É C |
| Test for 'Dead | ne Status' | Nana | Value(s) | Image | |
| equals | | V NOTE | | | |
| is greater than | or equal to | | | | |
| lo greater alan | | | | | |
| Show data v | are applied in the order listed an alues in ToolTips | 1d processing stops | at the first successful test | | Cancel |
| Help | | m | port Indicator Criteria | | |

I used the following settings for my example:

| Test for 'Deadline Status' | Value(s) | Image |
|-----------------------------|----------|--------------------|
| equals | None | Leave Blank |
| is greater than or equal to | 7 | Dark Green Circle |
| is greater than or equal to | 5 | Light Green Circle |
| is greater than or equal to | 2 | Yellow Circle |
| is less than or equal to | 1 | Red Circle |



6. The final step is to display your newly created custom column in your Gantt Chart view.

To Insert a column, just Right-Click on the Task Name column and select Insert Column, and choose the 'Deadline Status (Text1)' field from the list.



Your column will look like the one below. Now experiment with different Deadline dates to test your column.

| | 0 | Deadline Status | Task Name 💂 | Duration 💂 | Start 👻 | Finish 👻 | Deadline 👻 | т | F ! | Fi S S | eb 1 | 13, ': 1 T | 11 W | TI | FS | Fe | b 20 | , '11 T W | (T | F S | Fi S S | eb 27 | 7, '1 T | 1 W | T I |
|---|---|--------------------|-------------|------------|-------------|-------------|-------------|---|-----|-----------|------|-----------------|----------|----|----|----|------|----------------|-----|-----|-----------|-------|------------|--------|-----|
| 1 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | | | Task A | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/25/11 | | | | | | | | | | | | | | | | | | |
| 3 | | 0 | Task B | 5 days | Mon 2/14/11 | Fri 2/18/11 | Wed 2/23/11 | | | | | | | | | | | | ₽ | | | | | | |
| 4 | | 0 | Task C | 5 days | Mon 2/14/11 | Fri 2/18/11 | Mon 2/21/11 | | | | | | | | | | 4 | , | | | | | | | |
| 5 | | 0 | Task D | 5 days | Mon 2/14/11 | Fri 2/18/11 | Fri 2/18/11 | | | | | | | | ÷. | | | | | | | | | | |
| 6 | | | Task E | 5 days | Mon 2/14/11 | Fri 2/18/11 | NA | | | | | | | | = | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | |

This Tip is provided by **Tom Baker**, Director of Consulting at Excel Solutions Team. Tom has over 10 years training and consulting experience, and has been a user of Microsoft Project since the 1998 version.

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