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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 2/25/11					\$
3		Task B	5 days	Mon 2/14/11		Wed 2/23/11					÷
4		Task C	5 days	Mon 2/14/11		Mon 2/21/11					
5	•	Task D	5 days	Mon 2/14/11		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 Quration: 5 days m Estimated							Estimated			
	Deadjne: Fri 2/25/11										
						-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					
		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	eb 13, '11 S M T W T F		eb 20, '11   M   T   W   T   F   1	Feb 27, '11 S S M T W T F
1												
2		۲	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				÷	
5		0	Task D	5 days	Mon 2/14/11	Fri 2/18/11	Fri 2/18/11		<	۶.		
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 Name _	Duration ,	Start	Finish	Deadline	Predecessors		eb 13, '11	1	Feb 20, '1	1	Feb 27, '11
	0		buración ,	Jaart	riman	• Deaurine •	Fredecessors 🖕						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	ustom Fields				23					
									1				
			1	jeld									
				Task     C Re	esource	Project Type:	Text	•					
				Deadine Stat.	is .			^					
				Field Deadline Status (Tex	(+1)								
				Text2									
				Text3									
				Text4 Text5									
				Text6									
				Text7				-					
				Rename	Delete	Add Field to Enterprise	Import Field						
				Custom attributes									
				_	ookup @	Formula							
				Calculation for task an									
				None      Rolup		y rows							
				Calculation for assignm		- O use to							
				None Roll do									
				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 S	itatus				
Field					
Deadline Status	(Text1)				
Text2					
Text3 Text4					
Text5					
Text6					
Text7					
T					-
Rename	Delete	Add Field to	Enterprise	Import F	ield
Custom attributes					
None	Lookup	Formula			
Calculation for task	k and group sum	mary rows	•		
None     Ro	llup:	*	🔘 Use formula	3	
Calculation for ass	ignment rows				
None	ll down unless m	anually entered			
Values to display					
🔘 Data 🛛 🔘	Graphical Indic	ators			
Help			ОК	Ca	ncel

Now add the following formula and press OK:

Eield	
Task     Resource     Project	Type: Text 👻
Deadline Status	
Deadline Status (Text1)	
Tauka	8
Formula for 'Deadline Status'	
Edit formula	
Deadline Status =	
IIf([Deadline]>99999,"None",DateDiff("d",[Fi	inish],[Deadline]))
+-*/ & MOD \ ^ ()	= <> < > AND OR NOT
Insert: Field - Function -	Import Formula
Help	OK Cancel
- nep	
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
Eield
Deadline Status
Field
Deadline Status (Text1)
Text2 Text3
Text4
Text5
Text6
Text7
Rename Delete Add Field to Enterorise Import Field
Rename Delete Add Field to Enterprise Import Field
Custom attributes
None Lookup   Formula
Calculation for task and group summary rows
None     Rollup:     OUse formula
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				
Nonsummar	v rows				
<ul> <li>Summary ro</li> </ul>					
	v rows inherit criteria from nons	ummary rows			
O Project sum					
	summary inherits criteria from s	ummary rows			
Cut Row	Copy Row Paste Ro	w Insert Row	/ Delete Row		
equals					^ _
Test for 'Dead equals	ine Status'	- None	Value(s)	Image	
is greater than		▼ None			Mov
is greater than		/			-
	hical indicators in place of actua	[ <sup>9</sup>			*
	are applied in the order listed a values in ToolTips	nd processing stops		ок [	Cancel
Help		Im	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 👻	1	TIF	= s		, '11 T   V	F		20, '1 1 T		TF		27, ' M   T	11  W	TF
1								1													
2		•	Task A	5 days	Mon 2/14/11	Fri 2/18/11	Fri 2/25/11											<b>\$</b>			
3			Task B	5 days	Mon 2/14/11	Fri 2/18/11	Wed 2/23/11									4					
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	1					_\$								
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.

Are you new to Microsoft Project or maybe just a casual user? Does working with Project just seem tougher than it should? If so, you or your team might be interested in learning more about Microsoft Project and its capabilities. Take a look at our Microsoft Project Course Outlines and contact us to discuss our training solutions.

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