

# OPDEC Task Review Tool

## Version 2020



**Summary:** The Task Review tool is reporting tool that generates easy to read management reports depicting “Slipped” and/or “Look-ahead” activities, completed, tasks that are at risk, and interfaces (hand-offs).

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### **Minimum Software Requirements:**

- Milestones Professional 2008 ([www.kidasa.com](http://www.kidasa.com))
- Microsoft Project 2010
- Microsoft Windows 7

### **Installation and Activation**

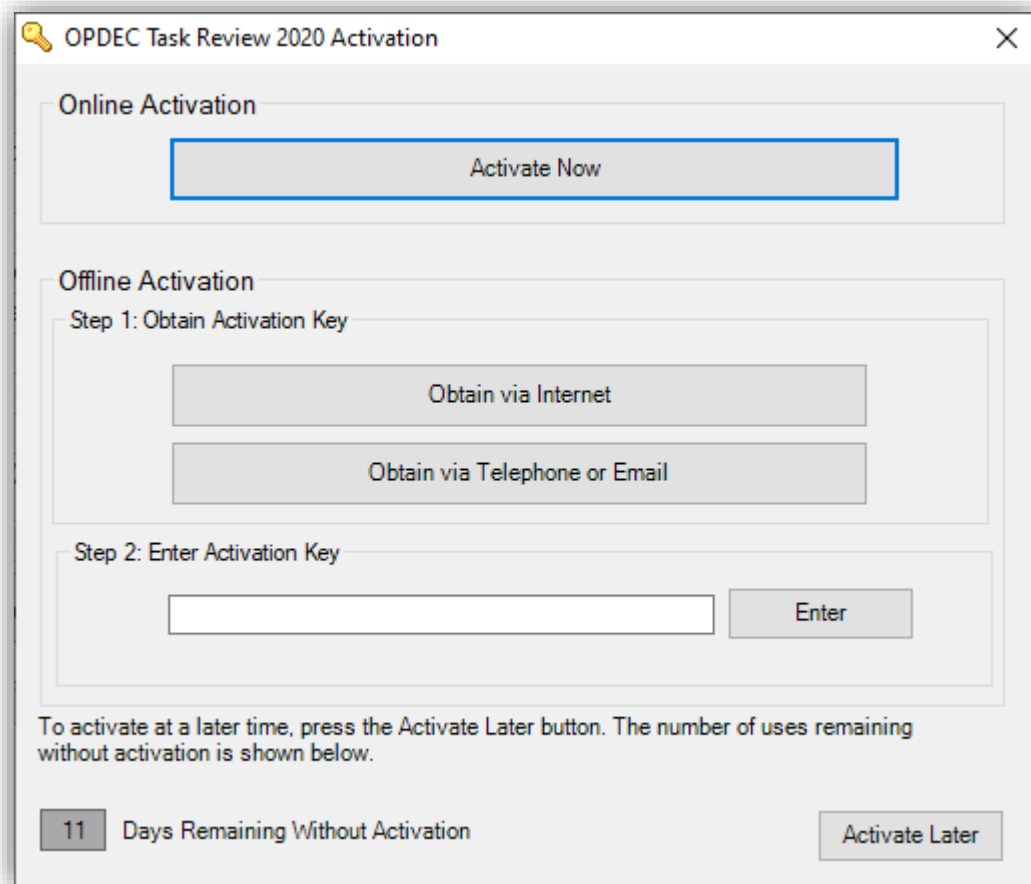
#### **Installation**

- 1) Download the installation file from [www.opdec.com/ms-project-tools/critical-path-tool](http://www.opdec.com/ms-project-tools/critical-path-tool)
- 2) Run the file to begin setup
- 3) Follow the on-screen prompts indicating installation location and the end user license agreement

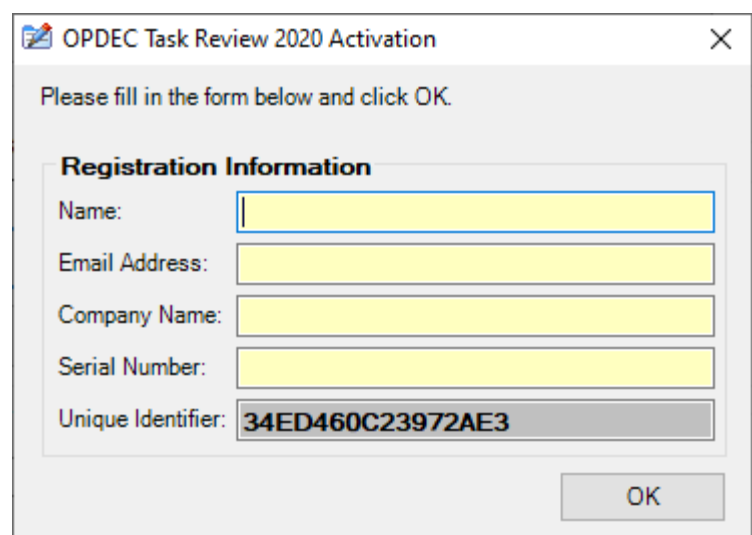
#### **Activation**

- 1) Open Microsoft Project
- 2) Navigate to the “OPDEC” ribbon and click the “Critical Path” button in the “2020 Base Tools” group.

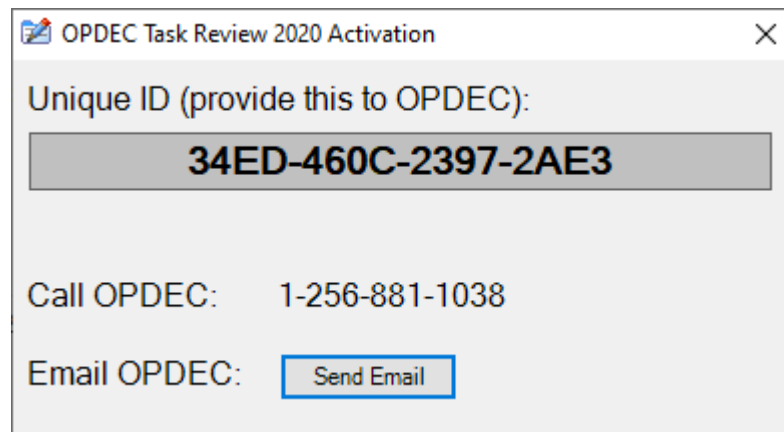
- 3) Upon first launch, you will be presented with the activation window. The activation process can be delayed for up to 30 days using the “Activate Later” button.



- 4) If you have an internet connection on your PC, click “Activate Now”
- a. Fill in your name, email, company, and assigned serial number provided upon purchase of the software. It is an 8-digit, alphanumeric code separated by a dash (e.g. a1b2-c3d4).



- b. Click “OK” and your activation will be complete. Note that sometimes internet security measures will prevent the online activation. Please see #5 below.
- 5) If you do not have an internet connection, click “Obtain via Telephone or Email” in “Step 2: Offline Activation”
  - a. A popup will appear displaying your PC’s unique identifier.

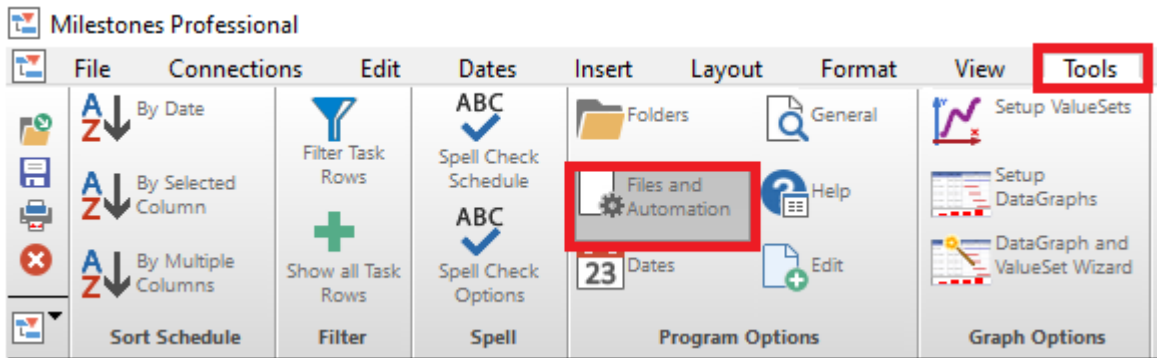


- b. You will need to provide this to OPDEC Support along with your serial number in order to receive an activation key. You can email us at [support@opdec.com](mailto:support@opdec.com) using the “Send Email” button, or call us at (256) 881-1038.

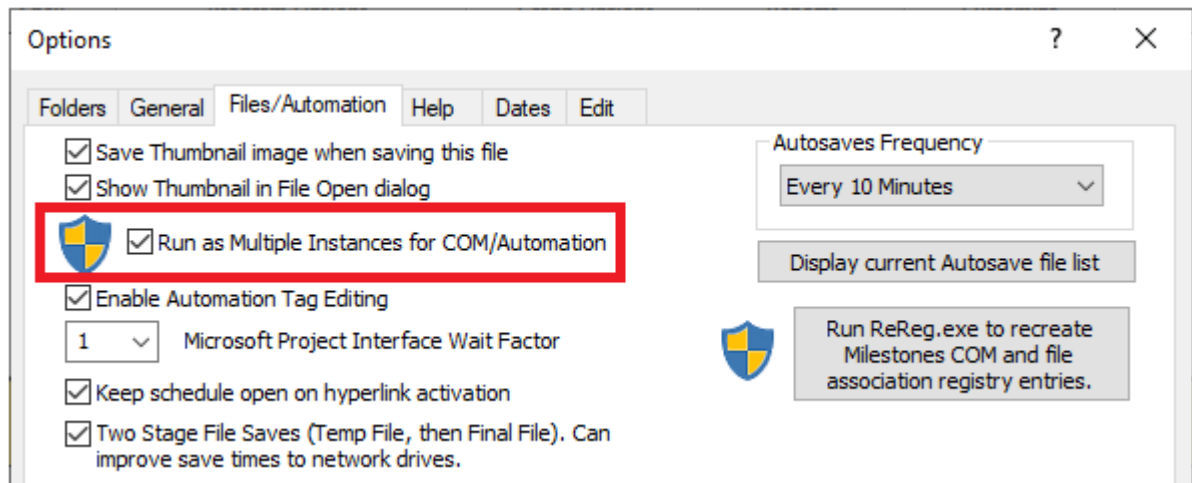
## Milestones Professional Setup

There is an option within Milestones Professional that will allow the Critical Path tool to automate it more smoothly. This option does not interfere with any manual use of the Milestones Professional software, so we advise you set this as soon as possible.

1. Open Milestones Professional
2. Navigate to the “Tools” ribbon, and select the “Files and Automation” button in the “Program Options” subgroup.



3. Next, check the “Run as Multiple Instances for COM Automation” as seen below. Setting this option will require administrator privileges on your PC.



## Utilizing Milestone Professional Templates

The Task Review Tool displays data from MS Project by utilizing Milestones Professional templates. Default templates are provided for each of the report types available in the Task Review Tool. These templates can be configured to display and report various types of information. The default chart templates can be found in the **Program Files\OPDEC Tools\Task Review 2020\Templates**

Some of the more common attributes that are manipulated via the template are as follows:

- Text sizes and placement
- Graphical indicators
- Symbol manipulation (for Gantt charts)
- Introduction of company and/or program logos
- Legend entries
- Row shading
- Much, Much, More

To learn more about utilizing Milestone Professional templates, contact KIDASA software @ 1-800-765-0167 or OPDEC support @ 256-881-1038

## Column Properties

To change the data being populated into a templates' column, double-click the column's header and then the Column Formatting tab (Figure 4). The automation tag is used by the Task Review Tool to determine the type of MS Project data that should be populated into it. This tag can be automatically populated by selecting the 'MS Project field' drop-down and selecting the field you would like to display. Doing this will automatically populate the automation tag with the appropriate value. In this example, the 'Baseline Start' date was selected. Notice that the automation tag shows 'baselinestart'. This is exactly how the field values needs to be displayed in order for it to be picked up by the tool.

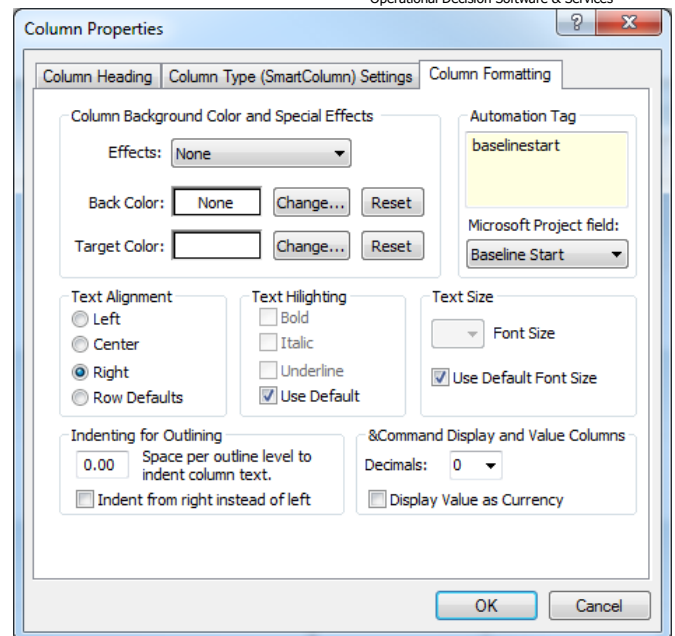


Figure 4

Aside from the project fields available from the 'MS Project field' drop-down, the following additional custom automation tag values are recognized:

- TRcoreissue – Identifies the activity as being a Core Issue
- TRimpact – Identifies the activity's program/baseline impact to the schedule
- TRperiodvariance – Identifies the activity's change in status from a previous period. When this automation tag is applied, the tool will prompt the user during execution to select a MS Project file of which to report a variance from. **It is critical that the user refrain from interfacing with MS Project while the tool is executing this process.**
- TRperiodvarianceCamPC – Same function as TRperiodvariance, but uses the CAM% rather than %Complete field. The output will show "%:" change rather than "%C:" change
- TRtar – Identifies if the activity is at risk
- TRtotalslack – Identifies the total slack when major milestones are constrained to their target
- TRinterface\* - Replace the '\*' part with the automation tag value available from any one of the 'MS Project field' drop-down options. This will return that MS Project field from the interface 'To' activity. So for example for the baseline start of the interface to activity, you would set the automation tag to 'TRinterfacebaselinestart'.
- TRinterfaceorgorder – Use this field when trying to order the IPT/Organization based on the IPT the report was generated for. For example, if the report was for IPTA and there are handoff from and to IPTA, this field will enter a value of '2' for IPTA and a value of '1' for any other IPT. This allows all IPTA handoff to be sorted.
- TRinterfacedatediff – Shows the date difference between the handoff
- TRinterfacelinktype – Shows the relational link type and lead/lag to the handoff

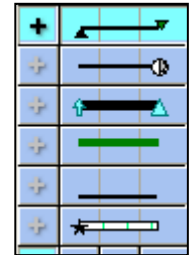
Although there are reports that would complement the use of some of these custom automation tags more than others, they can be used within any template file the user desires



### Default Gantt Symbols

Baseline and Schedule symbols for both tasks and milestones can be manipulated via the template. Also, the status indicating (when using % Complete) symbol can be changed. Figure 5 shows the default manner in which these toolbox symbols are shown. The symbols used by the Task Review Tool are as follows:

- Baseline start for milestones – Row 1 Column 2
- Baseline finish for milestones – Row 1 Column 4
- Status indicator – Row 2 Column 2
- Schedule start for tasks – Row 4 Column 2
- Horizontal connector for Schedule tasks – Row 4 Column 3
- Schedule finish for tasks – Row 4 Column 4
- Baseline start for tasks – Row 5 Column 2
- Horizontal connector for baseline tasks – Row 5 Column 3
- Baseline finish for tasks – Row 5 Column 4

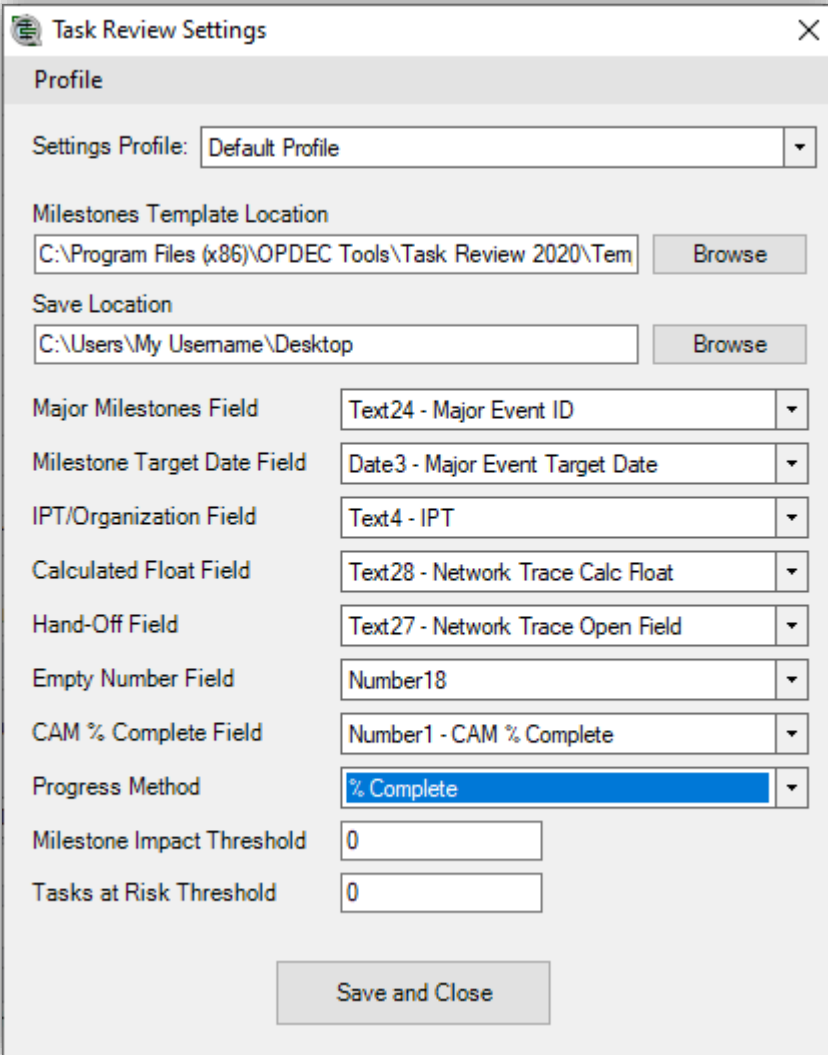


**Figure 5**

## Task Review Tools Menu

### Settings

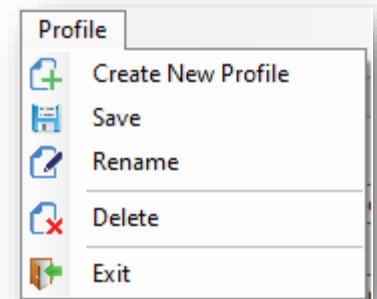
Once installation and activation have been successful, you must then define the settings the tool should utilize during execution. To do this, launch the Task Review tool and select 'Settings' from the 'Tools' menu bar.



The following settings must be defined (Figure 7):

- 1) **Milestone Template Location:** This is the location of the Milestone Professional templates you want to utilize for the tool. Default templates are available in the default location of **Program Files\OPDEC Tools\Task Review 2020\Templates** folder.
- 2) **Save Location:** This is the location where the reports will be generated to.

- 3) **Major Milestones Field:** Select the field where your major milestone events are identified. Available options are Text1-Text30. Any summary activities identified as a major milestone event will be ignored.
- 4) **Milestone Target Date Field:** Select Figure 7 the date field that contains the target completion date for the major milestones. The date in this field is used to constrain the milestone in order to realize the targets impact to the schedule. Available options are Baseline Start/Finish 1-10, Date1-10, Deadline, and Start/Finish 1-10.
- 5) **IPT/Organization Field:** This setting is used to show ownership of the activity. A separate chart will be created for each unique value found in this field during processing. Available options are Text1-Text30.
- 6) **Calculated Float Field:** This field is used by the tool to store the calculated float during the milestone constraining process. Available options are Text1-Text30.
- 7) **Hand-off Field:** This field is used by the tool to store the hand-offs identified for an activity.
- 8) **Empty Number Field:** This field is used by the tool when the “Tasks at Risk” report is selected. Available options are Number1-20
- 9) **CAM % Complete Field:** The field selected here should reflect the CAM’s identified % complete for an activity. This field is required for the Tasks at Risk Report. Available options are Physical % Complete and Number1-20.
- 10) **Progress Method:** This setting is used to determine how progress will be displayed on the chart. Options are % Complete, Physical % Complete and Status Date.
- 11) **Milestone Impact Threshold:** The threshold value entered here determines the point in which a slipped activity is considered a program milestone impact. For example is the threshold is -10, then the program will show a red status for all activities that have a total slack that is less than or equal to -10.
- 12) **Tasks at Risk Threshold:** The ‘tasks at risk’ formula is “% Complete – CAM % Complete”. The threshold is the tolerated variance before it is identified as of being at risk.



## Settings Profile

At the top of the settings form, you will see the “Settings Profile” option. To fill this list with multiple settings profiles (for use with multiple schedules), you can use the “Profile” menu option and its available actions to create a new profile as well as rename, save, or delete the currently selected profile.

## Export Milestone Professional files

Export to PowerPoint
✕

Hide Custom Settings

C:\Users\MyUserName\Documents\My Schedule PowerPoints Browse

Select All Files
  Search Subdirectories
 Find Now

File Name	Date Modified	Size (KB)	Folder

Export to PowerPoint
 Resize Images To Fit Slide  
 Force (4:3) Aspect Ratio

**Custom Size and Position Settings**

<u>Key Word/Phrase in File Name</u>	<u>Horizontal</u>	<u>Vertical</u>	<u>Height</u>	<u>Width</u>

The tool provides a utility to export Milestones Professional images to a Microsoft PowerPoint presentation. Each file selected will be placed on slide in the resulting presentation. To get started, click on the “Tools” menu item and then click on the “Export to PPT” menu item.

- Directory – The text field at the top of the form tells the utility where to find Milestone Professional files. This field is defaulted to the save directory specified in the Critical Path settings dialog. The browse button will allow you to select a different directory.
- Search Subdirectories – This option lets the “Find Now” action know whether to only search files within the immediate folder location specified, or whether it should search all subfolders within the directory.
- Find Now – This button searches the directory (and if specified, its subdirectories) for all Milestones Professional files. Each file found will be loaded as a checked item in the file display grid below it.
- File Display – This list displays all files found by the search. Each file can be checked/unchecked to indicate whether it should be exported to PowerPoint.
- Show/Hide Custom Settings – This menu option will expand the export utility interface to include the Custom Settings area at the bottom of the interface. These settings will dictate the size and position of the image in PowerPoint.
  - The **Keyword** column contains fields where the user may enter any unique word or phrase that will be in the Milestones Professional files' name. Any file name that contains the keyword entered will have the corresponding size and position settings applied to it when the image is exported to PowerPoint.
  - The **Horizontal** column should contain how many inches from the left you would like your image placed on the PowerPoint slide. This field should correspond to the "Horizontal" field in the "Size and Position" window of the image in PowerPoint.
  - The **Vertical** column should contain how many inches from the top you would like your image placed on the PowerPoint slide. This field should correspond to the "Vertical" field in the "Size and Position" window of the image in PowerPoint.
  - The **Height** column should contain the desired height in inches you would like your image to be once the image has been placed in PowerPoint. This field should correspond to the "Height" field in the "Size and Position" window of the image in PowerPoint.
  - The **Width** column should contain the desired width in inches you would like your image to be once the image has been placed in PowerPoint. This field should correspond to the "Width" field in the "Size and Position" window of the image in PowerPoint.
- Export to PPT – This button will create MS Power Point slides for each file in the file listing. Each page of a Milestone Professional file will become a single MS Power Point slide. The generated PowerPoint is not saved, but left open and displayed to the user.
- Force (4:3) Aspect Ratio – This checkbox will configure the resulting PowerPoint into a standard (4:3) resolution (intended for standard monitors, not widescreen ones). If your

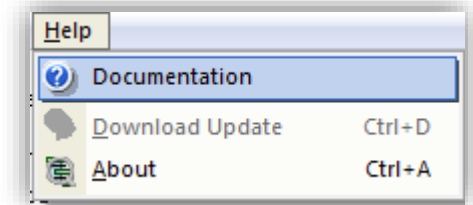
images look stretched or with extra room on the slide, try setting this option to improve the results.

- Resize Images to Fit Slide – This option will force the chart image inserted into the PowerPoint to cover the entire slide it's put on. This may be helpful especially in conjunction with charts produced using the "Auto Size Chart Height" setting, as these larger images can extend beyond the slide's width/height. This option can either shrink or grow the image, and does not regard the original aspect ratio of the image.

## **Task Review Help Menu**

### **Download Update**

The 'Download Update' option is enabled when a updated version of the Task Review software is available (Figure 9). Selecting this option will direct the user to the opdec website tool page where the update can be downloaded ([http://www.opdec.com/msp\\_task\\_review.html](http://www.opdec.com/msp_task_review.html)).



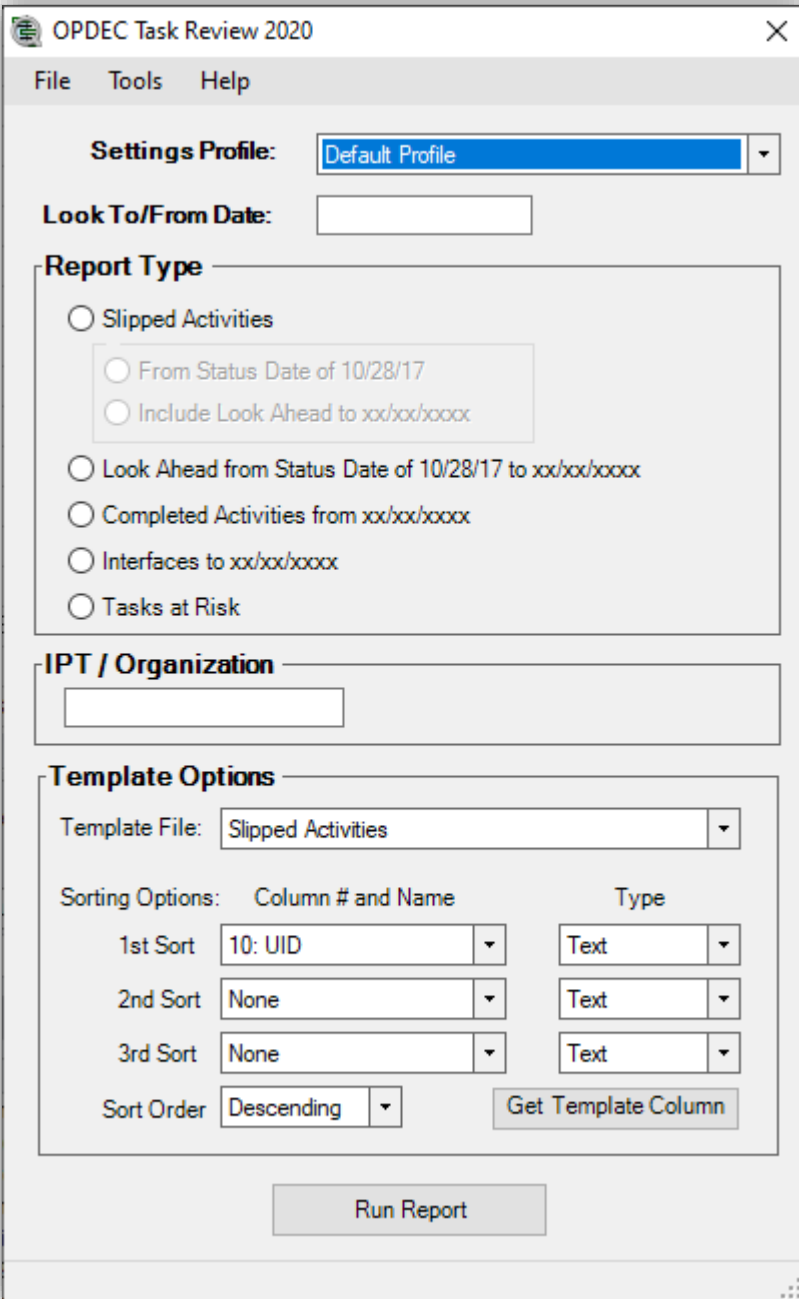
**Figure 10**

### **About**

The 'About' option gives the user information on the software version currently installed as well as support contact information.

## Generating Reports

The main screen of the Task Review Tool is where you specify the report and template conditions you want to operate under. These options are as follows:



OPDEC Task Review 2020

File Tools Help

Settings Profile: Default Profile

Look To/From Date:

**Report Type**

Slipped Activities

From Status Date of 10/28/17

Include Look Ahead to xx/xx/xxxx

Look Ahead from Status Date of 10/28/17 to xx/xx/xxxx

Completed Activities from xx/xx/xxxx

Interfaces to xx/xx/xxxx

Tasks at Risk

**IPT / Organization**

**Template Options**

Template File: Slipped Activities

Sorting Options:	Column # and Name	Type
1st Sort	10: UID	Text
2nd Sort	None	Text
3rd Sort	None	Text

Sort Order: Descending

- **Look To/From Date** - The date entered here is used by most of the reports available in order to narrow down the amount of content to report on.



- **Report Type** - Select the type of report you want to generate. The report types and their criteria are as follows
  - Slipped Activities From Status Date
    - Baseline start  $\leq$  the status date and has not actually started
    - **Or**
    - Baseline finish  $\leq$  the status date and has not actually finished
  - Slipped Activities to Include Look Ahead
    - Schedule start  $\geq$  the status date, schedule start  $\leq$  the 'Look To/From Date', and the activity has not actually started.
    - **Or**
    - Schedule finish  $\geq$  the status date, schedule finish  $\leq$  the 'Look To/From Date', and the activity has not actually finished.
  - Look Ahead
    - Schedule start  $\leq$  the 'Look To/From Date' and the activity has not actually started.
    - **Or**
    - Schedule finish  $\leq$  the 'Look To/From Date' and the activity has not actually finished.
  - Tasks at Risk
    - Tasks that have not completed
    - **And**
    - Variance between the CAM % complete and the task % complete is outside of the task at risk threshold (see Tasks at Risk Threshold from the settings screen) + or -.
  - Interfaces
    - Activities that have not completed and are schedule to complete  $\leq$  the 'Look To/From Date'
    - **And**
    - The IPT or Organization is either handing off or receiving an activity from another IPT or Organization
  - Completed Activities
    - Activities whose actual finish date is  $\geq$  the 'Look To/From Date'

***Note: Summary activities are not reported***

## **IPT/Organization**

This reporting option allows the user to specify an IPT/Organization in particular that they want to generate a report for. Leave this option empty in order to generate reports for every IPT/Organization you have defined in the schedule.

## **Template Options**

The following options are configurable for each report type. The options selected here affect how the report is displayed. The template options are as follows:

- Template File to Use - This drop-down option will populate with all the Milestone Professional template (.mtp) files found in the 'Milestone Template Location' (see settings) defined.
  
- Sorting Options - The sorting options are used to sort the generated report in the manner depicted here. Up to 3 levels of sorting can be selected.
  - The 'Column # and Name' drop-downs show the columns that are specified in the milestone template selected.
  - The 'Type' drop-down is used to identify the column data type (i.e. Text, Numeric, Date, and Currency).
  - Finally, select the 'Sort Order' that the report should sort by.
  
- Get Template Columns  
To refresh the column drop-downs to reflect the most current columns specified in the template, press the 'Get Template Columns' button. Users will want to do this so that any changes made to the template columns can be seen through this interface.

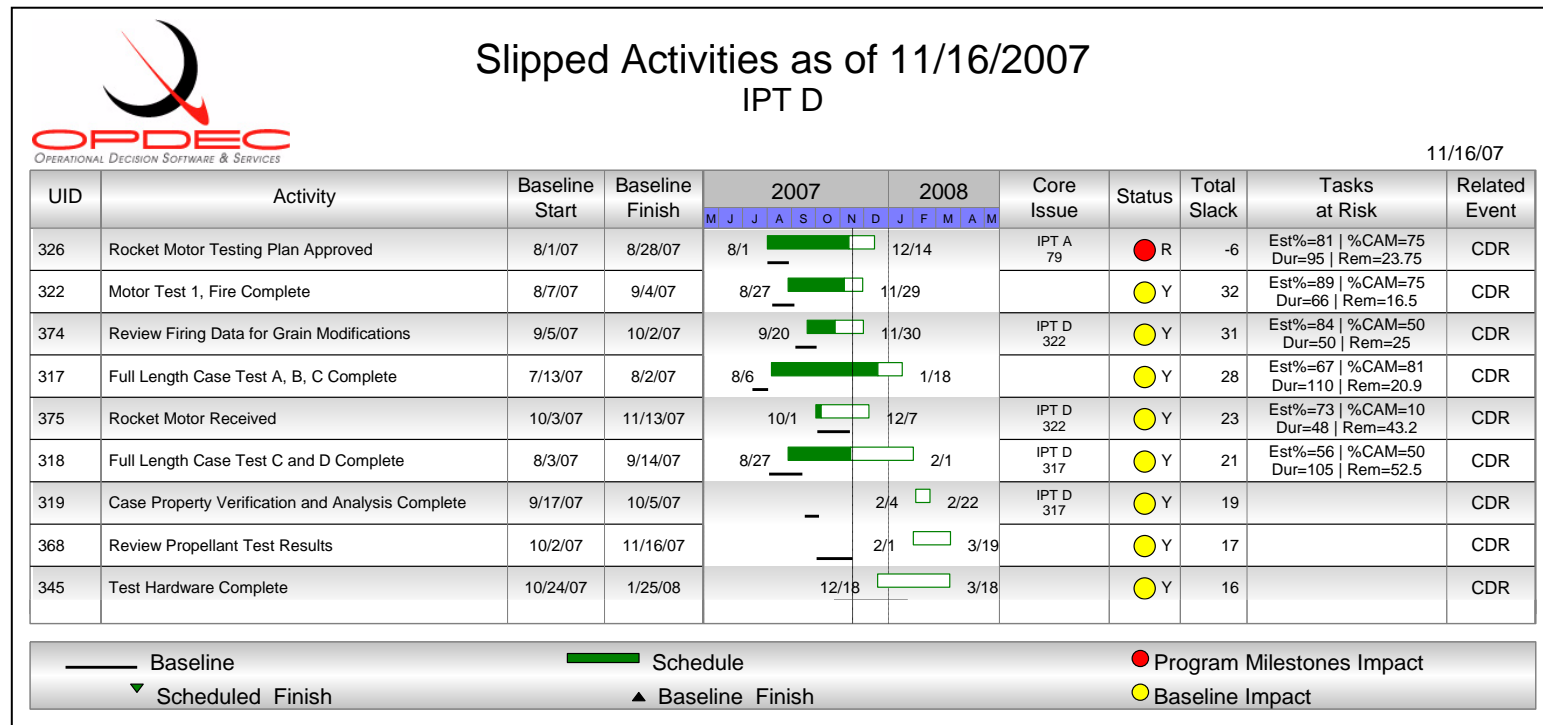
## **Run Report**

Once all settings and reporting options have been selected, press the 'Run Report' button to generate the report(s) requested.

## Report Examples Using Default Templates

### Slipped Activities

Slipped Activities are defined as those activities that have exceeded the planned date and may cause a delay in another activity in meeting its milestone date. Using the default Milestone Professional template 'Slipped Activities.mtp', the following report example was created.



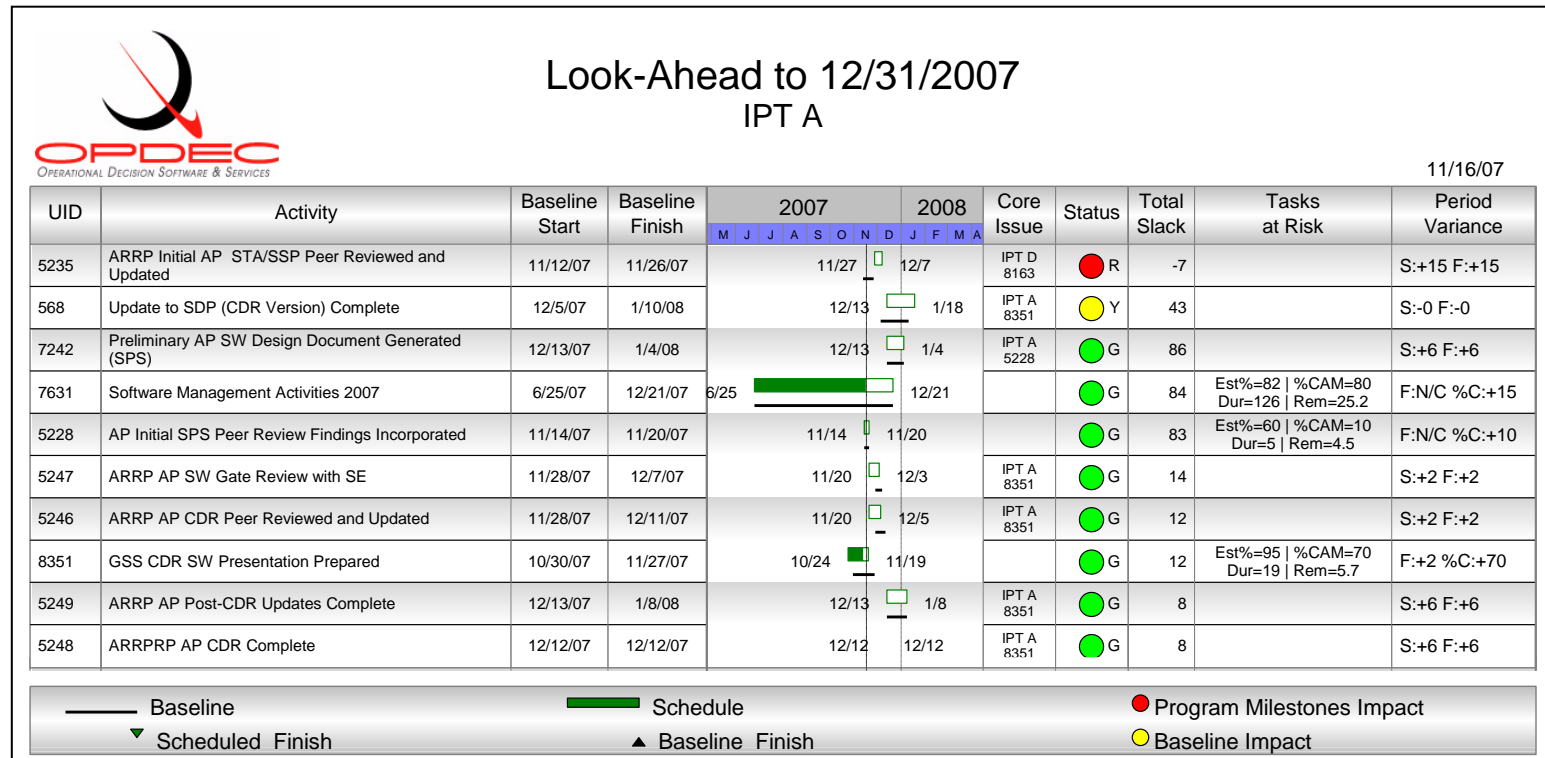
The left-hand side of this report shows the activities that have passed their baseline as of the 11/16/2007 project status date. The Gantt chart is representative of the schedule dates as well as the baseline. In this template, the schedule dates are shown next to the schedule bars. On the right-hand side, the following custom fields are defined:

- Core Issue: If this column blank then this task has no open predecessors, therefore is a core issue. If it is not blank then the core issue is identified by the Organization Field and the UID. This is used to address just the core issue activities.

- **Status:** This is the impact on the project major milestones. If the status is red then the activity is causing a program milestone impact. If the status is yellow then it is not impacting the program, but is just past its baseline dates. In logic terms, if the slack is less than or equal to the threshold set (see **Program Milestone Impact Threshold** from settings section) then the status is red, else if the baseline finish is less than the schedule finish then the status is yellow. If those criteria are not met, then the status is green.
- **Total Slack:** The total slack shown here is the slack at the point where the program level milestones were constrained to their target dates.
- **Tasks at Risk:** This column indicates is the activity is considered at risk. In the example above UID 7631 is at risk because it's estimated % complete is 82 while the specified CAM % complete is only 80. Now this may not seem like a large enough variance to warrant the task at risk, but for this report our variance threshold was set to zero (see **Tasks at Risk Threshold** from the settings section). If we were to allow a variance threshold of +-5, then this activity would not have shown at risk. The Task at Risk column also shows what the duration of the task is compared to the duration remaining.
- **Related Event:** This column was populated by a text field in project which depicted the major milestone that the 'To' activity impacts. This value was updated in project using OPDEC's Traceback utility.

## Look Ahead

The Look Ahead report gives the user insight into the activities scheduled to start or complete up to the 'Look to Date' specified (see Look to Date under the Generating Reports section). Using the default Milestone Professional template 'Look Ahead.mtp', the following report example was created.



The left-hand side of this report shows the activities that are scheduled to start/finish by 12/21/2007. The Gantt chart is representative of the schedule dates as well as the baseline. In this template, the schedule dates are shown next to the schedule bars. On the right-hand side, the following custom fields are defined:

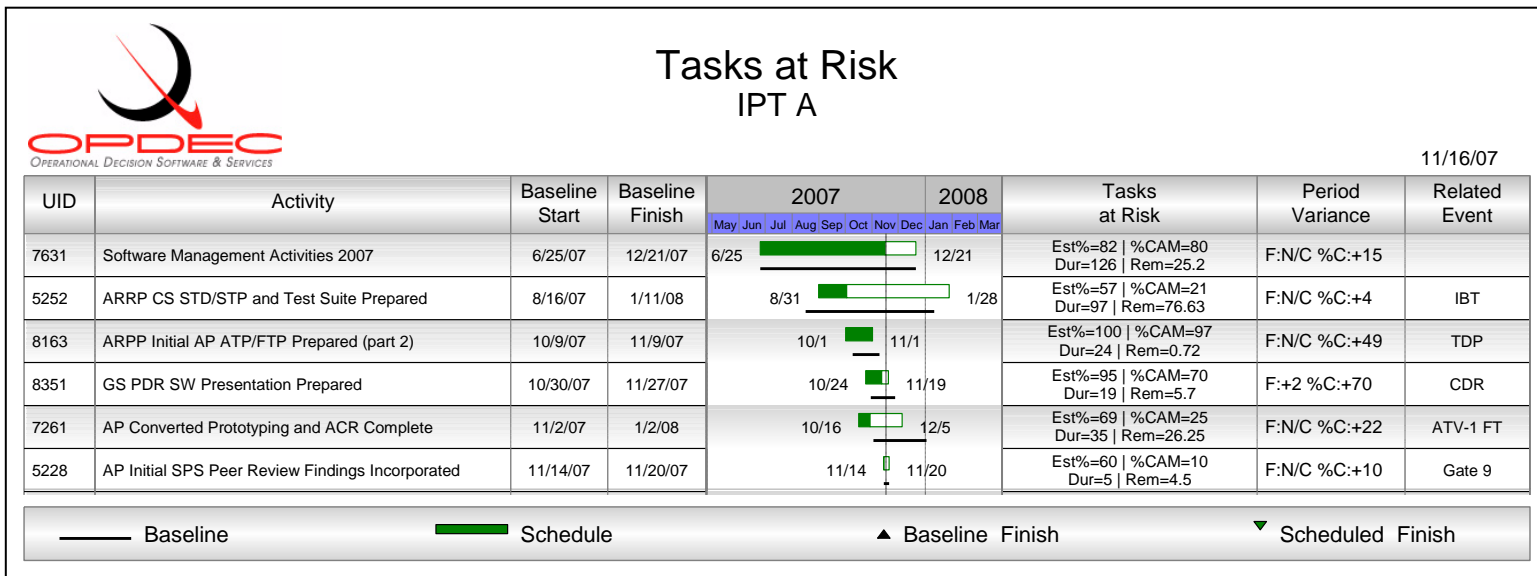
- Core Issue: If this column blank then this task has no open predecessors, therefore is a core issue. If it is not blank then the core issue is identified by the Organization Field and the UID. This is used to address just the core issue activities.
- Status: This is the impact on the project major milestones. If the status is red then the activity is causing a program milestone impact. If the status is yellow then it is not impacting the program, but is just past its baseline dates. In logic terms, if the

slack is less than or equal to the threshold set (see **Program Milestone Impact Threshold** from settings section) then the status is red, else if the baseline finish is less than the schedule finish then the status is yellow. If those criteria are not met, then the status is green.

- **Total Slack:** The total slack shown here is the slack at the point where the program level milestones were constrained to their target dates.
- **Tasks at Risk:** This column indicates is the activity is considered at risk. In the example above UID 7631 is at risk because it's estimated % complete is 82 while the specified CAM % complete is only 80. Now this may not seem like a large enough variance to warrant the task at risk, but for this report our variance threshold was set to zero (see **Tasks at Risk Threshold** from the settings section). If we were to allow a variance threshold of +-5, then this activity would not have shown at risk. The Task at Risk column also shows what the duration of the task is compared to the duration remaining.
- **Period Variance:** This column identifies a task's change in status from a previous period. Depending on the task's current status, this column will depict change in its schedule start (S:), scheduled finish (F:) and % complete. If the activity was not found in the previous schedule, it will be labeled as "New Act". If the activity is slipped and was not considered slipped in the previous schedule, then it will be labeled as "New Slip Act" (only appliest when running slipped activity reports).

## Tasks at Risk

The Tasks at Risk report is designed to show activities whose % Complete variance exceeds the threshold given. This variance is computed by subtracting the Activities' % Complete from the CAM % Complete. Using the default Milestone Professional template 'Task at Risk.mtp', the following report example was created.



The left-hand side of this report shows the tasks that are considered at risk. The Gantt chart is representative of the schedule dates as well as the baseline. In this template, the schedule dates are shown next to the schedule bars. On the right-hand side, the following custom fields are defined:


- Tasks at Risk:** This column depicts the reason why the task is at risk. In the example above UID 7631 is at risk because its estimated % complete is 82 while the specified CAM % complete is only 80. Now this may not seem like a large enough variance to warrant the task at risk, but for this report our variance threshold was set to zero (see **Tasks at Risk Threshold** from the settings section). If we were to allow a variance threshold of +-5, then this activity would not have shown at risk. The Task at Risk column also shows what the duration of the task is compared to the duration remaining.
- Period Variance:** This column identifies a task's change in status from a previous period. Depending on the task's current status, this column will depict change in its schedule start (S:), scheduled finish (F:) and % complete.

- Related Event: This column was populated by a text field in project which depicted the major milestone that the 'To' activity impacts. This value was updated in project using OPDEC's Traceback utility.



## Interfaces

The interface report is designed to show near term hand-offs from one IPT/Organization to another. Using the default Milestone Professional template 'Interfaces.mtp', the following report example was created.

 <p style="text-align: center;"><b>Interfaces to 12/31/2007</b> IPT A</p> <p style="text-align: right;">11/16/07</p>												
From UID	From IPT	From Activity	Start	Finish	Link Type	Hand-off Slack	To UID	To IPT	To Activity	Start	Finish	Related Event
5228	IPT A	AP Initial SPS Peer Review Findings Incorporated	11/14/07	11/20/07	FS	0 d	7350	IPT E	Consult with SW team and identify initial list Safety SW features	11/21/07	12/13/07	Gate 9
367	IPT I	ATV-1 CRAS Software and Firmware Complete	99/99/99	12/14/07	FS	9 d	5256	IPT A	Code and Unit Test CSAP (CAS & AP) Software Complete	1/8/08	2/4/08	IBT
5073	IPT C	Engineering Release CDR Guidance Section CIDS	12/11/07	12/17/07	FS	167 d	471	IPT A	Update GP SRS For CDR	8/20/08	9/3/08	CDR
5055	IPT C	Release CDR Control Section CIDS	12/17/07	12/21/07	FS	68 d	5258	IPT A	Final ATV-1 Review and Analysis of RP/NAV CRD, CRD and CS SPS	4/7/08	4/10/08	IBT
8254	IPT F	Update Navigation CRAD for Initialization	10/19/07	12/13/07	FS	1 d	5254	IPT A	Initial ATV-1 Review and Analysis of RP/NAV CRD, CRD and CS SPS	12/17/07	1/7/08	IBT
8196	IPT F	Update Autopilot CRD (Final) for Dry Run	11/16/07	12/14/07	FS	0 d	5254	IPT A	Initial ATV-1 Review and Analysis of RP/NAV CRD, CRD and CS SPS	12/17/07	1/7/08	IBT
2126	IPT B	ATV-1 SPIL for FQT Complete (Receive Docand Proofing for DA	12/13/07	12/13/07	FS	102 d	5264	IPT A	CAP CSI Test Runs Complete	5/15/08	5/19/08	IBT

The left-hand side of this report depicts the 'From' activity whose schedule finish date is on or before 12/31/2007. On the right-hand side is the 'To' or successor activity. The following custom fields are defined:

- Link Type: The relations link type and lag to the successor
- Hand-Off Slack: This is time period between the handoff
- Related Event: This column was populated by a text field in project which depicted the major milestone that the 'To' activity impacts. This value was updated in project using OPDEC's Traceback utility.

## **Revision History**

- V20.0.0 (02/07/2020)
  - Initial release of the 2020 version of the Task Review Tool.
- V20.1.0 (03/24/2020)
  - Resolved issues with form visibility on low resolution monitors and PCs utilizing Windows 7 zoom features.
- V20.2.1 (05/11/2020)
  - Updated to allow for activation on FIPS-compliant systems.
- V20.2.2 (01/26/2021)
  - Important update to resolve issue of the add-in failing to load into the Microsoft Project ribbon.
- V20.2.3 (04/07/2023)
  - Resolved an error causing the Interfaces report to fail with an unexpected error if the IPT field did not have any values.
  - Fixed a bug causing the offline help documentation to not launch from the Help menu.
- V20.2.4 (10/13/2023)
  - Resolved error when clicking the Get Template Fields button multiple times in a row.
  - Resolved error when clicking the Run button multiple times in a row.