

OPDEC Task Review Tool

Version 2016



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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Installation and Activation

Follow the instructions seen while running the installation executable file TaskReview2016.exe.

Requirements:

- Milestone Professional 2008-2015 (www.kidasa.com)
- Microsoft Project 2003-2016 (32-bit version only)
- Microsoft Windows 7/8/10



- 1) Open Microsoft Project
- 2) Click on “Task Review ” in the OPDEC toolbar in the ribbon.

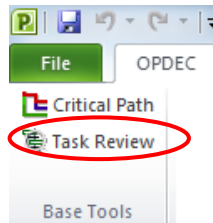


Figure 1

- 3) Once you first start-up the Task Review tool, you will be prompted to activate the software. (Figure 2).

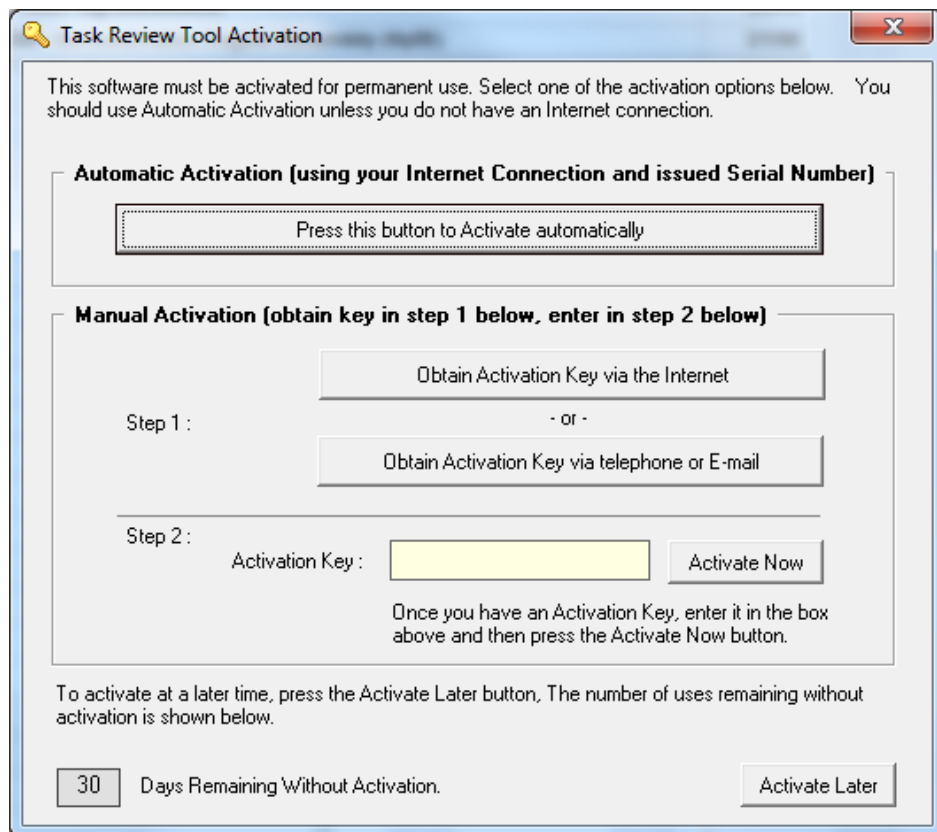
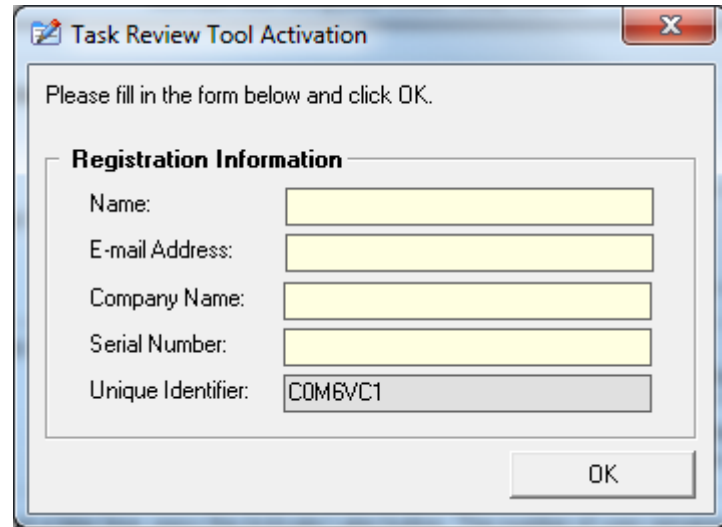


Figure 2

- a. Automatic Activation - If your computer is connected to the Internet, then you can use this easy option.
 - i. Click **Press this button to activate automatically**.
 - ii. Enter your name, email, company name, and the serial number that you were issued. Then click OK. (Figure 2a)
 - iii. If your firewall prevents this automated action, use the Manual Activation procedure as described below and entered into the registry.



Task Review Tool Activation

Please fill in the form below and click OK.

Registration Information

Name:

E-mail Address:

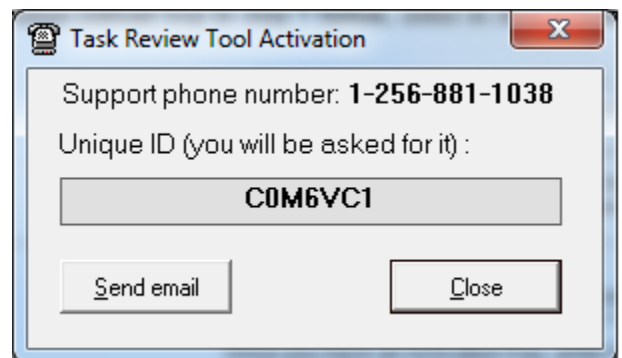
Company Name:

Serial Number:

Unique Identifier:

OK

- b. Manual Internet Activation - If your computer is connected to the Internet, then you can manually retrieve an Activation Key from the OPDEC web site.
 - i. Click **Obtain Activation Key via the Internet**.
 - ii. Your internet browser will launch, automatically go to the OPDEC web site, and display your Activation Key.
 - iii. Enter the Activation Key in the Activation Key slot, as shown in Figure 2.
 - iv. Press Activate Now.
- c. Manual Phone/Email Activation – If the two prior methods of activation are unsuccessful, click **Obtain Activation Key via telephone or E-mail**.
 - i. Send us an email or contact our support desk for more help. (Figure 2b)



Task Review Tool Activation

Support phone number: **1-256-881-1038**

Unique ID (you will be asked for it) :

Send email Close

You may choose Activate Later up to 30 days before the software is disabled.

For additional help contact our support desk at 256-881-1038 or e-mail us at support@opdec.com.

Milestone Professional Runtime Option

After installing Milestones Professional, the program option “Run as Multiple Instances for COM/Automation” must be checked. Figure 3a depicts Milestones Professional versions 2006 – 2008, while Figure 3b depicts Milestones Professional versions 2010 – 2015.

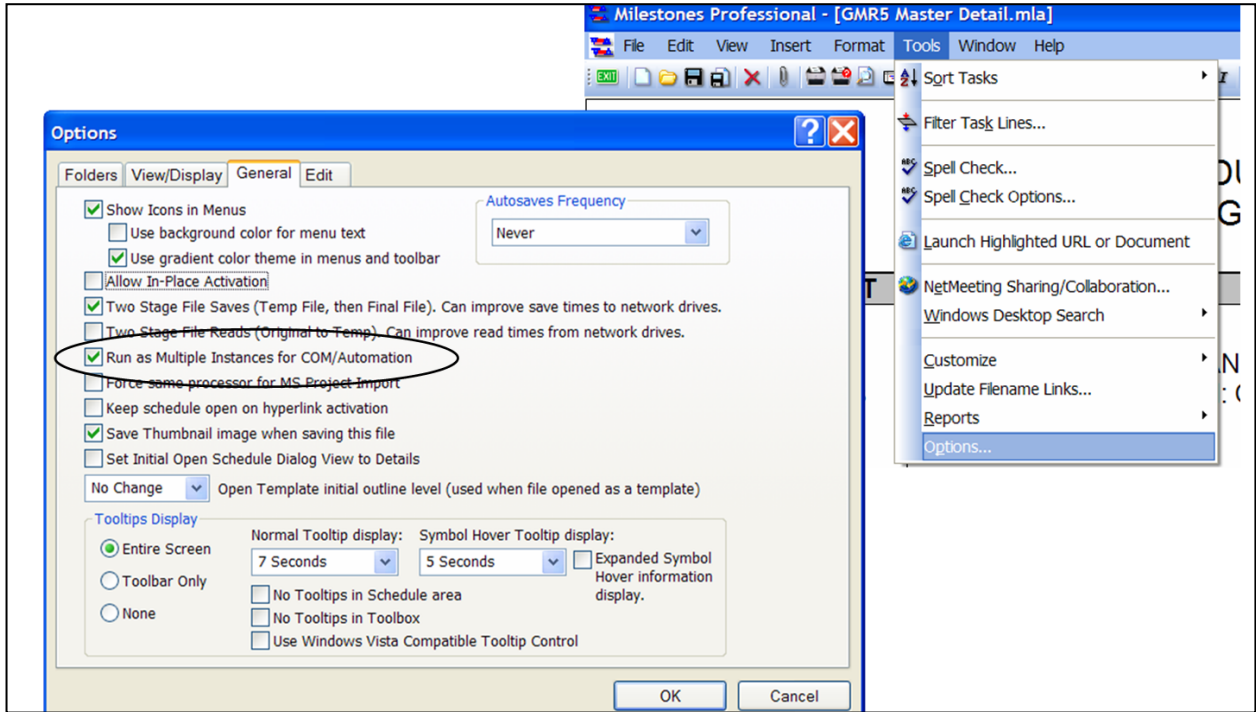


Figure 3a

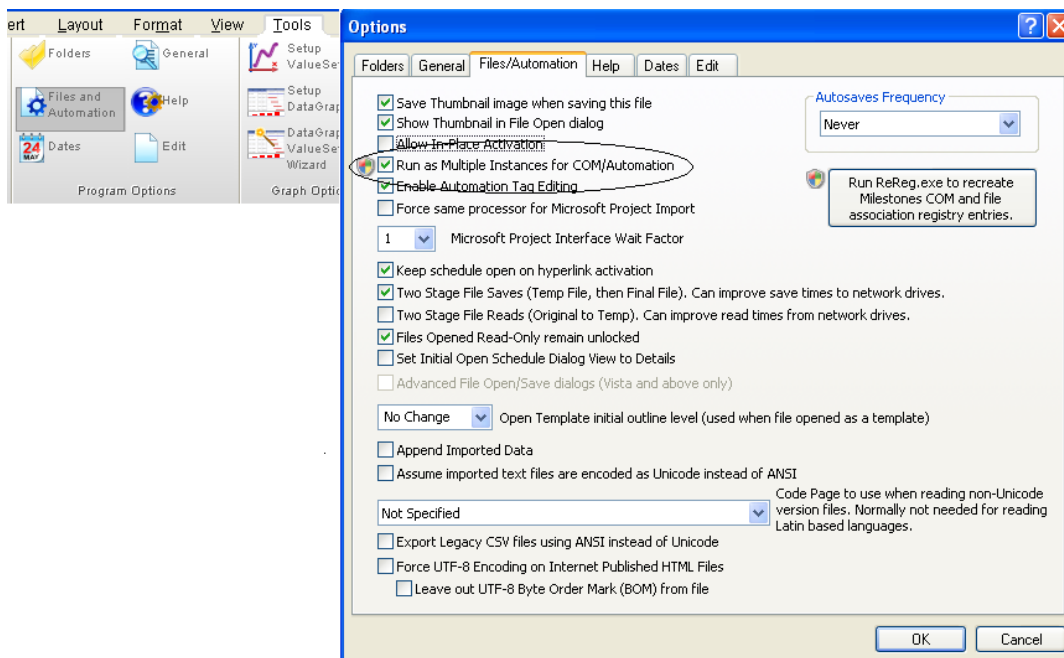


Figure 3b

Utilizing Milestone Professional Templates

The Task Review Tool display's 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 2016\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.

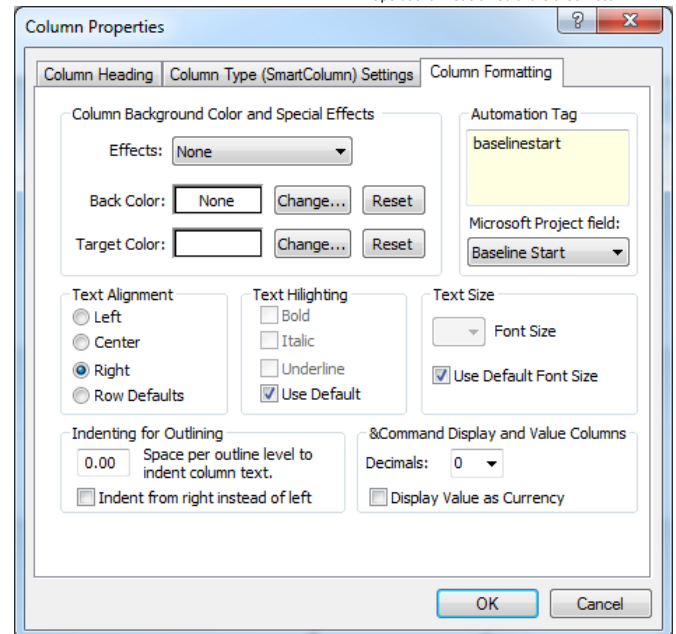


Figure 4

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 activities' 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 "C%:" 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

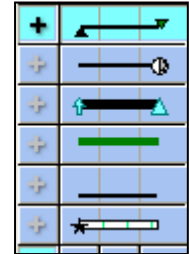


Figure 5

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 as shown in figure 6.

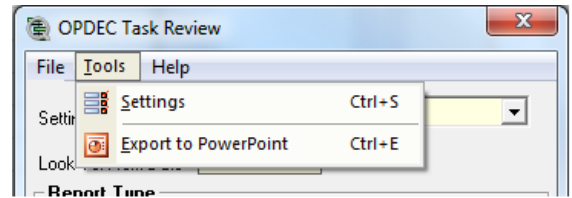


Figure 6

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 2016\Templates** folder.
- 2) **Save Location:** This is the location where the reports will be generated to.
- 3) **Select the Field Identifying Major Milestones:** 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) **Select the Target Date Field for those Milestones:** Select 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) **Select the IPT or Organization Field Identifier:** 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) **Select a Text Field to Store Calculated Float:** This field is used by the tool to store the calculated float during the milestone constraining process. Available options are Text1-Text30.
- 7) **Select a Text Field to Store Hand-offs:** This field is used by the tool to store the hand-offs identified for an activity.
- 8) **Select a Number field NOT used in your Project:** This field is used by the tool when the "Tasks at Risk" report is selected. Available options are Number1-20

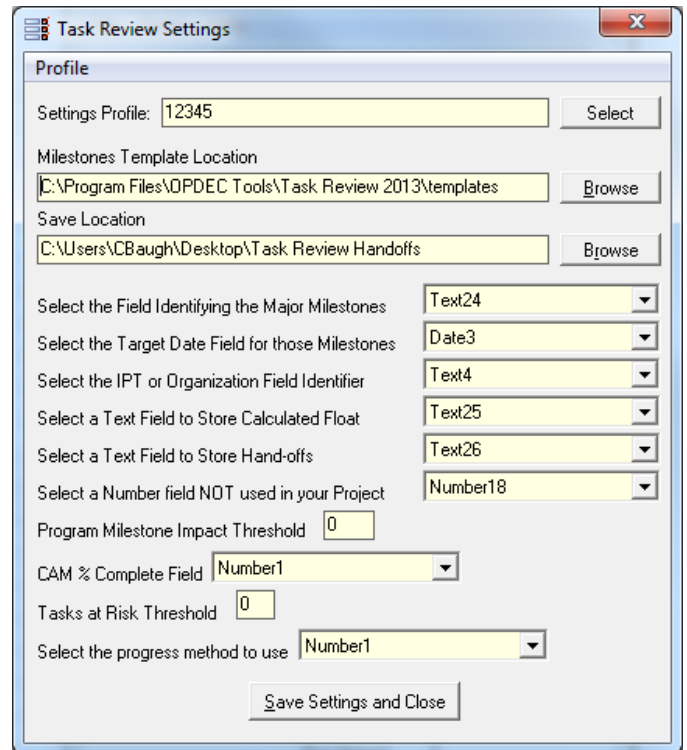


Figure 7

- 9) **Program Milestone Impact Threshold:** The threshold value entered here determines the point in which a slipped activity is considered a program milestone impact. For example if 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.
- 10) **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.
- 11) **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.
- 12) **Select the progress method to use:** This setting is used to determine how progress will be displayed on the chart. Options are % Complete, Physical % Complete and Status Date.

Profiles

Starting in version 2011, multiple combinations of settings can be saved and retrieved. The currently selected profile name is displayed at the top of each form. To switch profiles, either select a profile name from the drop-down box on the main form or click the **Select** button on the Settings form.

To create a new profile:

Enter the desired settings and select **Profile >> Save Profile As**

To delete a profile

Select **Profile >> Delete**

Save Settings performs the same function as the **Save** button, **Exit** closes the form without saving the changes

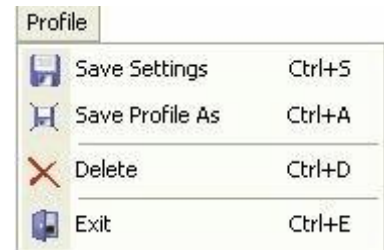


Figure 8

Export Milestone Professional files

- 1) The task review tool comes with a utility that allows for the exporting of Task Review charts to a single MS Power Point slide. Each page will become a slide in MS Power Point. In order to get to the export utility interface, click on the “Tools” menu item and then click on the “Export” menu item.
- 2) The export utility interface has several fields and options to enable exporting of Milestones Professional files to MS Power Point. (Figure 9)
- 3) Export utility fields and options
 - a. Directory – this field is where the export utility will look for Milestone Professional files. This field is defaulted to the save directory specified in the Critical Path settings dialog (Figure 4). The browse button will allow you to select a different directory.
 - b. Search Subdirectories – this option allows for the searching of subdirectories. This option will find all Milestone Professional files within the selected directory, not just those files that are directly under the selected directory. This option is not selected as a default.
 - c. Find Now – this button will find all Milestone Professional files within the selected directory.
 - d. Files listing – this list contains all the Milestone Professional files found. This list can be sorted by filename.
 - e. Remove button – this button will remove selected files from the file listing. Files can be selected individually by clicking on the file name. Multiple files can be selected by clicking on a file name, holding the control (Ctrl) button and clicking other files to be selected.
 - f. Show/Hide Custom Settings – This menu option will expand (**figure 9**) 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.
 - i. 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.
 - ii. 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.
 - iii. 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.
 - iv. 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.
 - v. 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.

- g. 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.

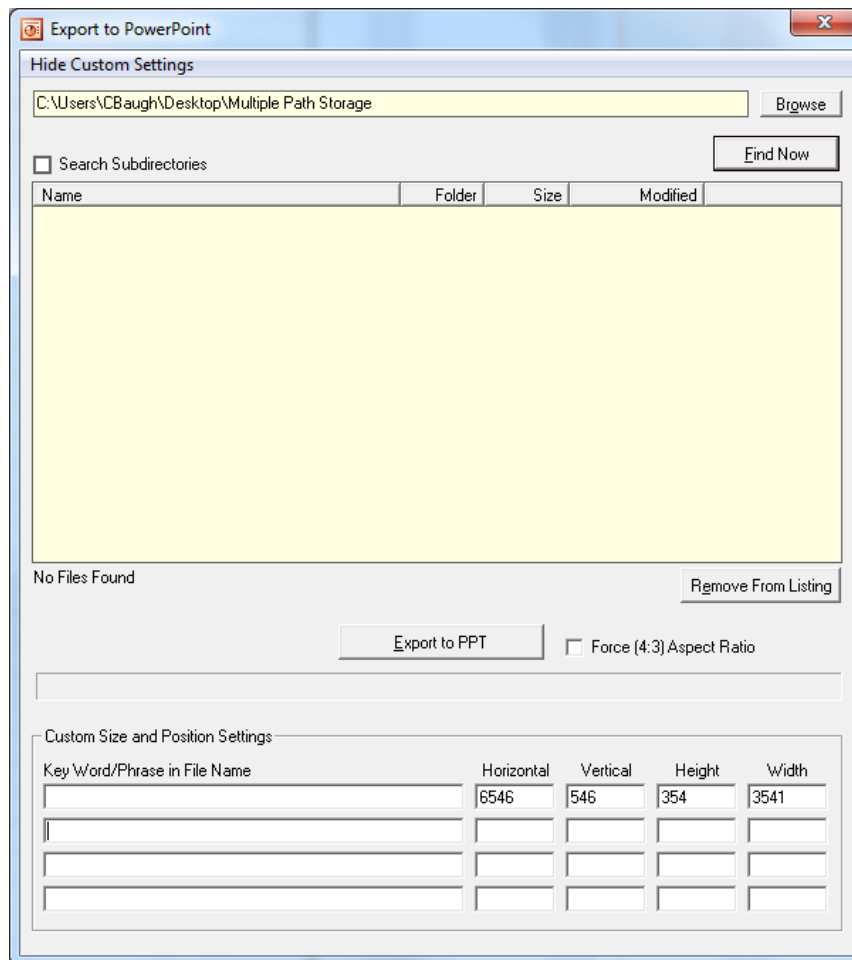


Figure 9

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).

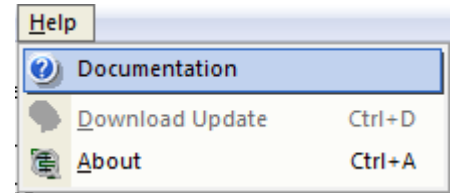


Figure 10

About

The 'About' option gives the user information on the software version currently installed as well as support contact information (Figure 11).

Generating Reports

The main screen of the Task Review Tool (Figure 11) is where you specify the report and template conditions you want to operate under. These options are as follows:

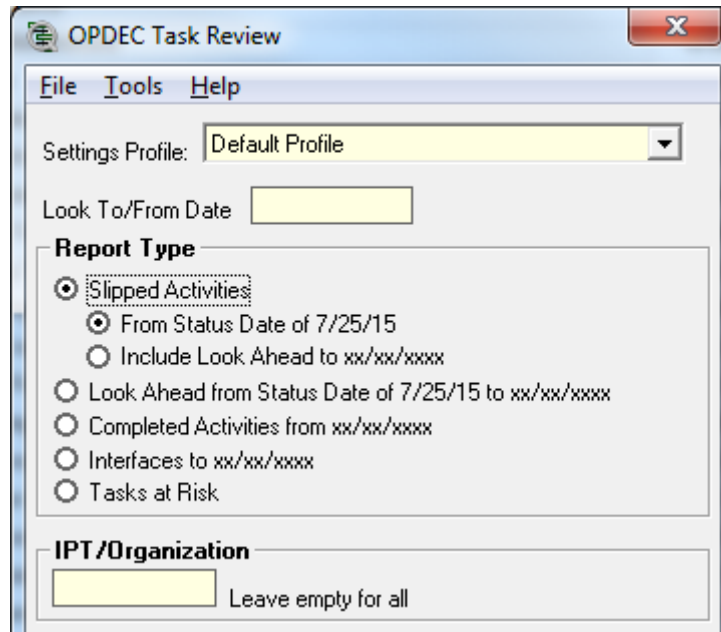


Figure 11

- **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 (Figure 12).

Template Options

The following options are configurable for each report type (Figure 12). 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.

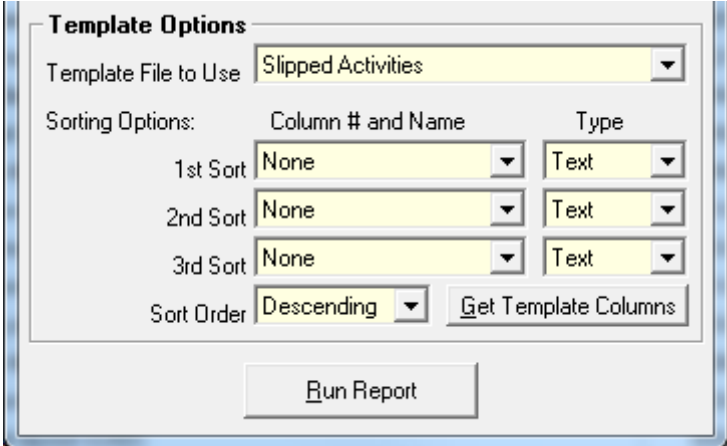


Figure 12

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 (Figure 13).

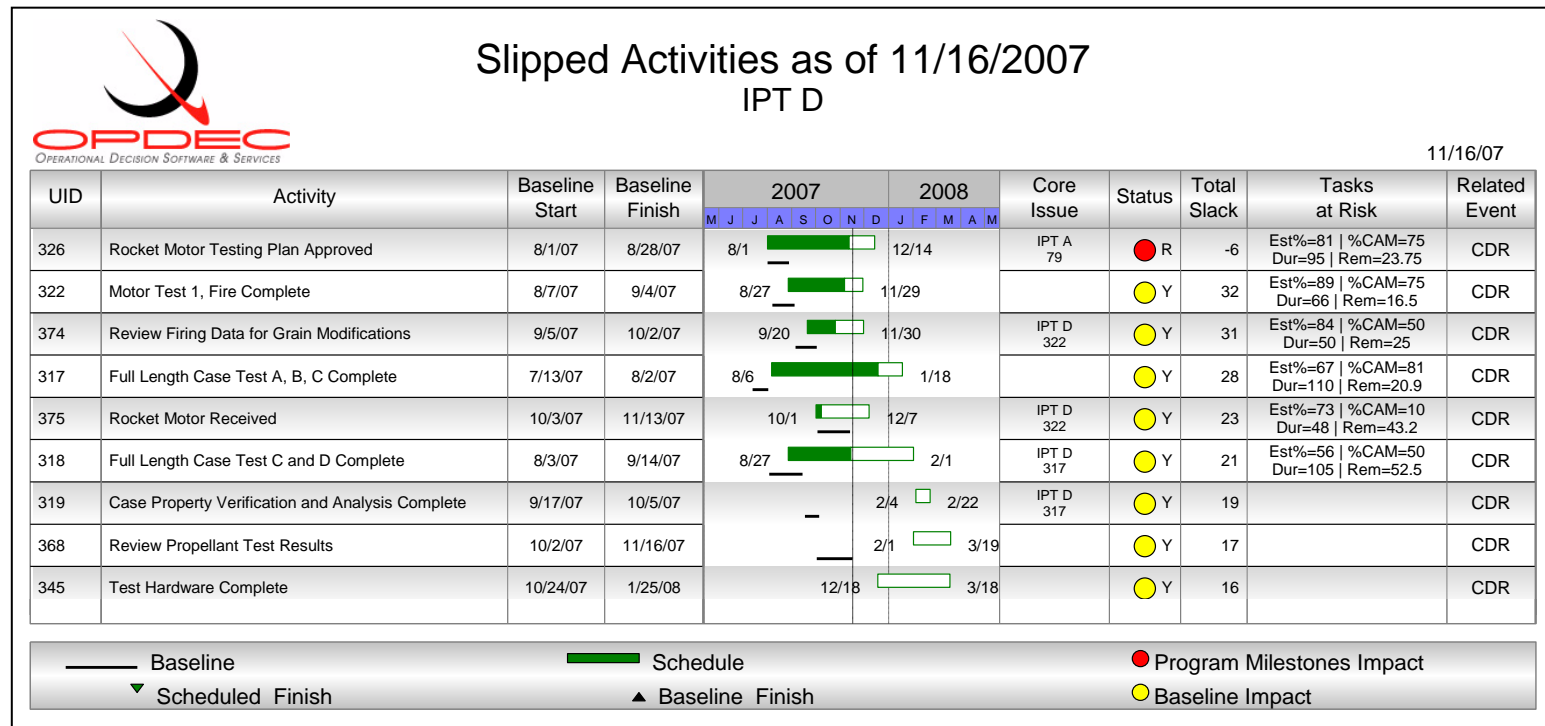


Figure 13

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 (Figure 13) UDI 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 (Figure 14).

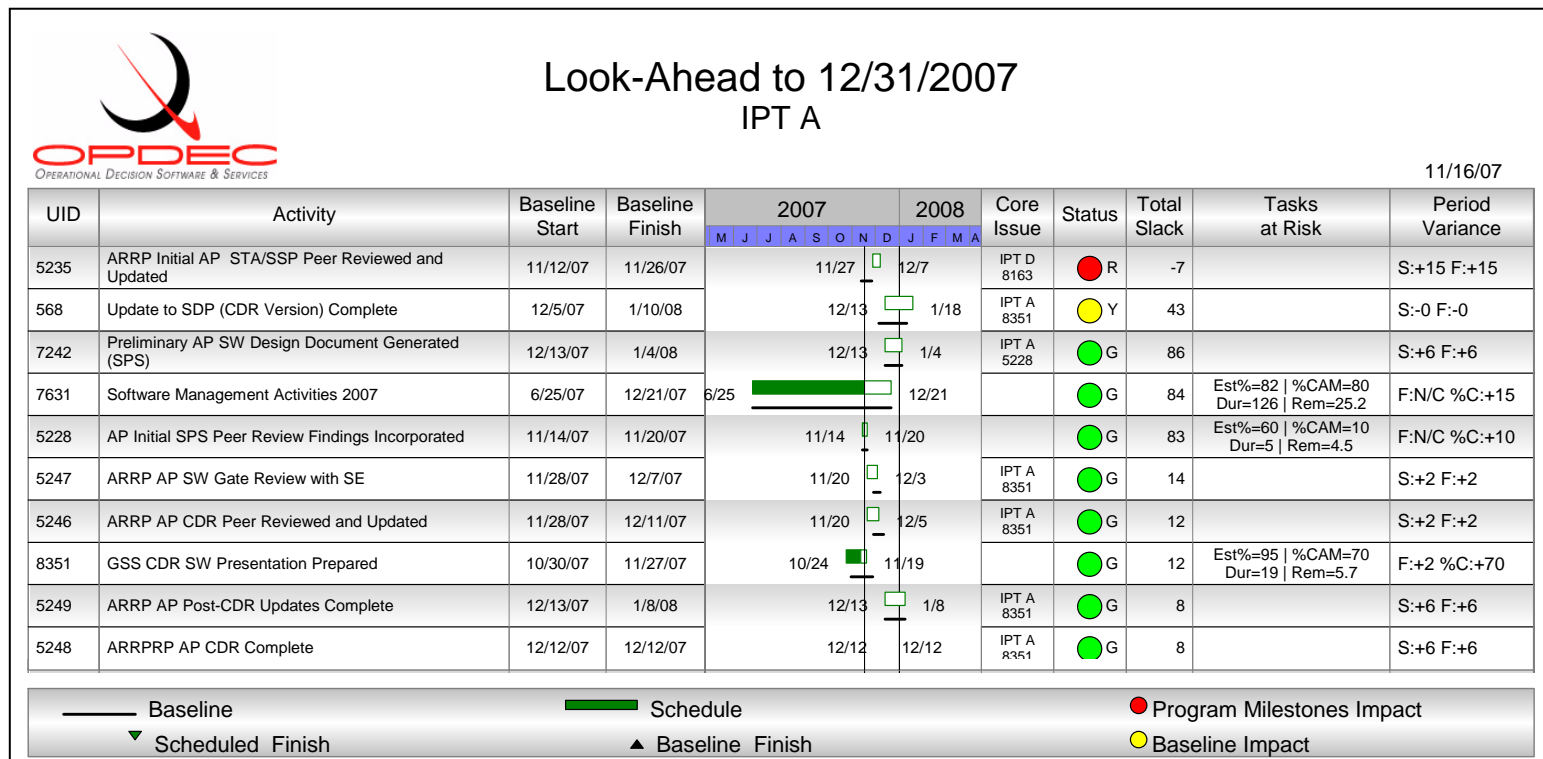


Figure 14

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 if the activity is considered at risk. In the example above (Figure 15) UDI 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. 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 applied 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 (Figure 15).

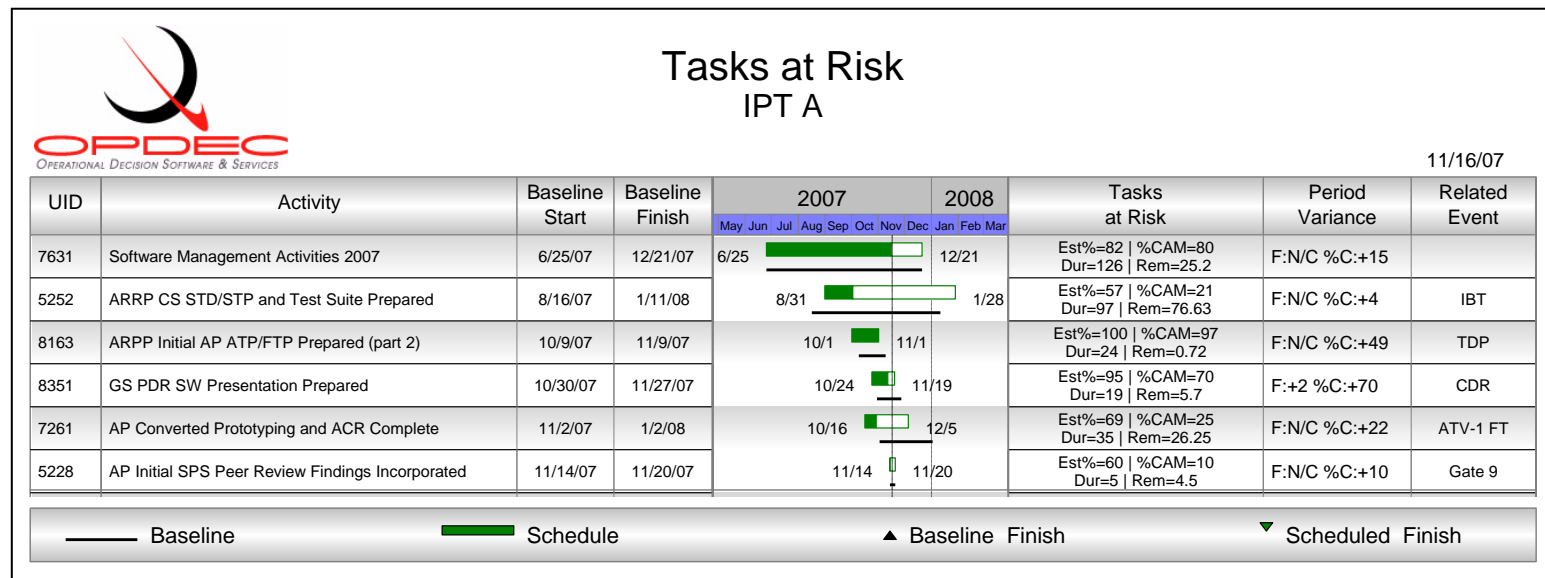


Figure 15

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 (Figure 15) UDI 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.
- **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 (Figure 16).


 <p style="text-align: center;">Interfaces to 12/31/2007 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

Figure 16

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.