

Lehnert Computer Services

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RE: Project Progress Comparison

Question: Every month I am required to produce a report that shows the status of the project schedule at the end of last month and compare it to the project schedule status at the end of this month. My management would like this report to be in both tabular format as well as Gantt Chart format. How would I produce this report?

Answer: Microsoft Project has the ability to produce both reports for you. However, I recommend that you set up a process for everyone to follow so the reports that are produced are repeatable and uniform.

The first step would be to decide on what fields you would like to compare. Typically, the comparison would include fields like start, finish, work, cost, duration and actual value fields. The comparison program will ask for a "table" for resources and a "table" for tasks to compare. You might consider creating custom tables for this purpose. Custom fields may be included in the comparison.

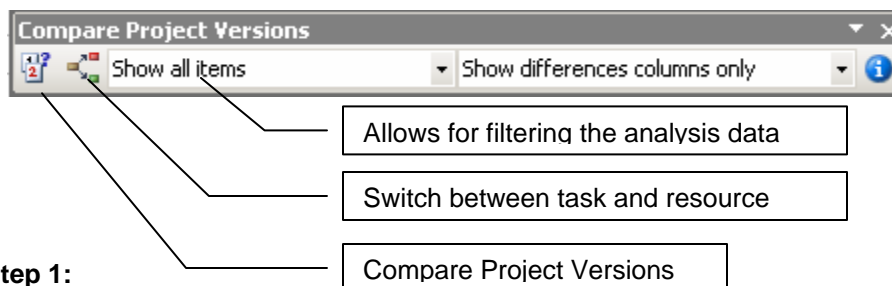
At the end of each month after tracking and re-scheduling has been completed, save the project schedule off to an alternate file naming the file with the date (yy-mm) in the name. After you have 2 months of data, follow the instructions below to produce both a table formatted report and a Gantt Chart report.

Compare Project Versions:

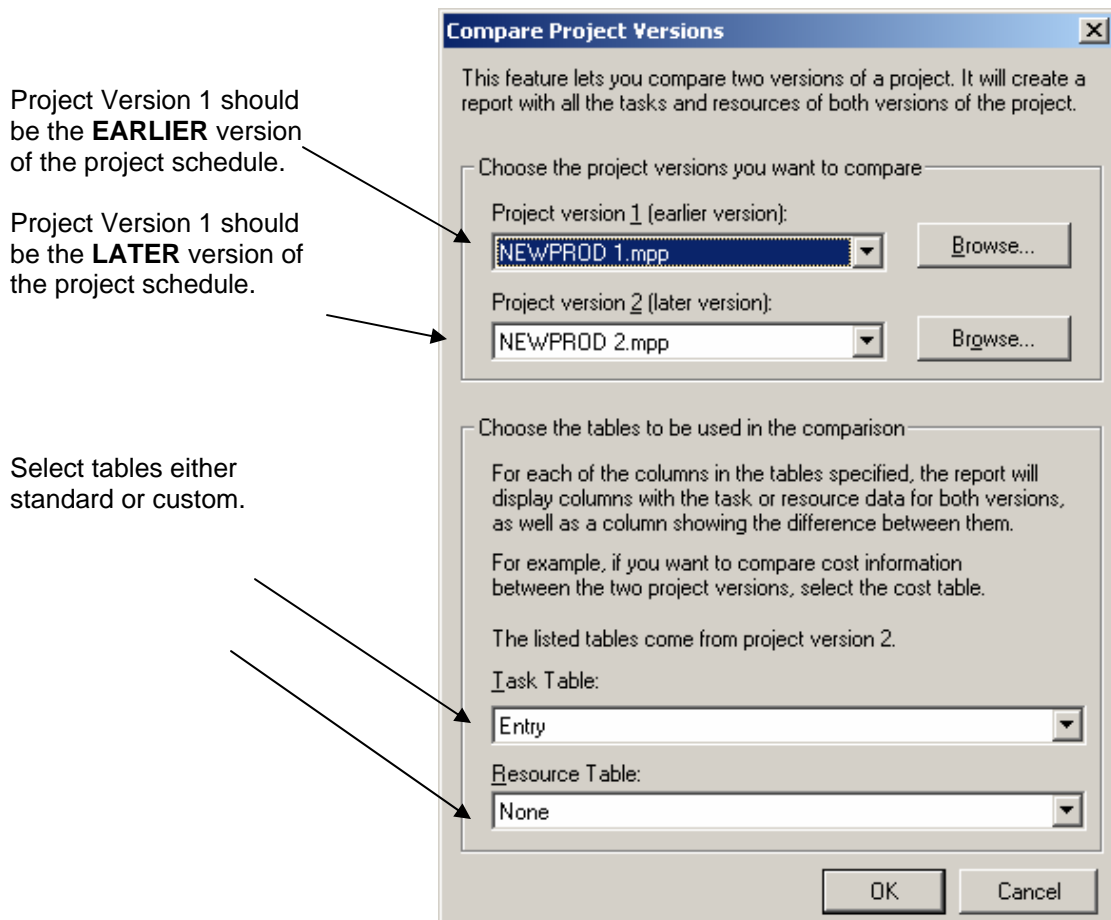
Purpose: The purpose of this function is to allow comparison between two selected versions of a project schedule. The results will show progress of the project schedule as a result of comparing the earlier version of the schedule to a later version of the schedule.

Compare Project Versions Toolbar:

View → Toolbars → Compare Project Versions



Click on the **Compare Project Versions** button:



Step 2: Create the Temporary file

The task and resource tables you select are important because it will only compare the data you are requesting. It is common to receive the error message that the table has too many fields and it will truncate and compare a limited number of fields. This will particularly occur when a field like cost is selected. The program will try to compare not just cost but cost1, cost2... cost10. The solution to this is when you get the error message, indicate to continue and there is a high probability that you will get the fields you are looking for.

After making selections, click **OK**.

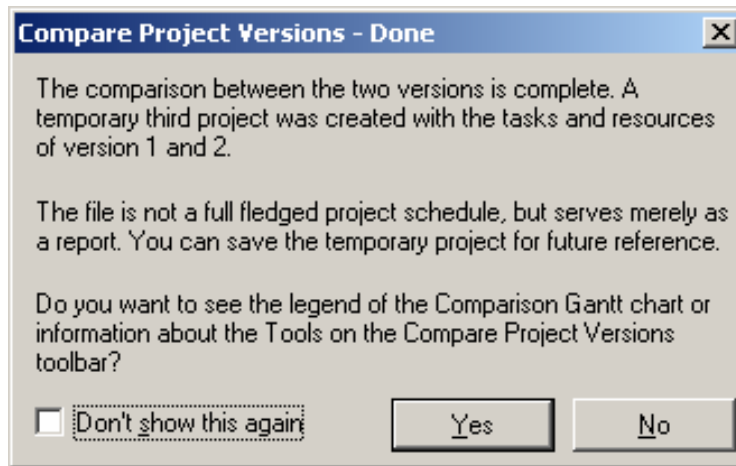
At this point a *temporary* project file will be created showing a comparison between the 2 requested project schedules.

When the function is completed, the following message will appear:

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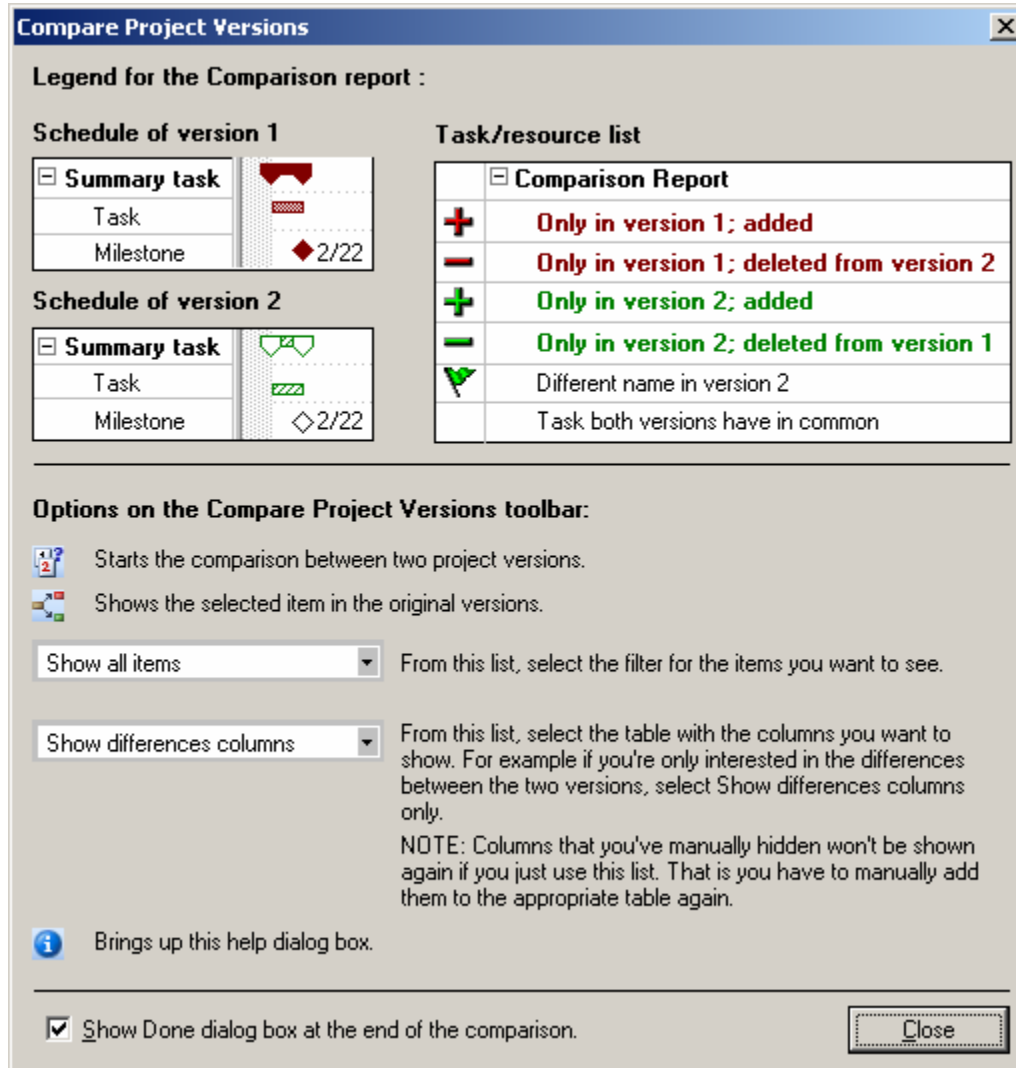
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Step 3: The Legend

Click "Yes" to this action at least the first time you run the comparison function to understand the new visuals that are being used. See below for the legend that will appear. Keeping this handy the first time is very helpful in understanding how to read the comparison file reports.



Compare Project Versions

Legend for the Comparison report :

Schedule of version 1

| | |
|--|------|
| <input type="checkbox"/> Summary task | |
| Task | |
| Milestone | 2/22 |

Schedule of version 2

| | |
|--|------|
| <input type="checkbox"/> Summary task | |
| Task | |
| Milestone | 2/22 |

Task/resource list

| | |
|---|--|
| <input type="checkbox"/> Comparison Report | |
| | Only in version 1; added |
| | Only in version 1; deleted from version 2 |
| | Only in version 2; added |
| | Only in version 2; deleted from version 1 |
| | Different name in version 2 |
| | Task both versions have in common |

Options on the Compare Project Versions toolbar:

- Starts the comparison between two project versions.
- Shows the selected item in the original versions.

Show all items From this list, select the filter for the items you want to see.

Show differences columns From this list, select the table with the columns you want to show. For example if you're only interested in the differences between the two versions, select Show differences columns only.

NOTE: Columns that you've manually hidden won't be shown again if you just use this list. That is you have to manually add them to the appropriate table again.

Brings up this help dialog box.

Show Done dialog box at the end of the comparison.

STEP 4: What to look for

- You will note that you are in a temporary project schedule. This schedule may be saved if you would like but it could only be used for reporting purposes.
- 6 New tables are built (3 for tasks and 3 for resources) with entry fields that show v1 (the earlier version) and v2 (the later version) for each field.. You may switch between tables.
- Other views will not show correctly data in the schedule (ie: Tracking Gantt)
- If you customize a table, it will use the new fields you have added
- Use filters on the toolbar to refine views of the data.



Click on a task then click this button and you get view on the next page. Shows how task looks in both projects

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The screenshot displays the Microsoft Project interface. The main window shows a project named 'Project2' with a task list and a Gantt chart. The task list includes:

| Task ID | Task Name | Duration |
|---------|------------------------------------|-----------|
| 0 | Comparison Report | 1.75 days |
| 1 | New Product Development | 1.75 days |
| 2 | Initial New Product Screening | 1.75 days |
| 3 | New product opportunity identified | 0 days |
| 4 | Describe new product idea (1-3) | 0 days |
| 5 | Gather information required for | 0 days |
| 6 | Convene opportunity of screeni | 0 days |
| 7 | Decision point - go/no-go to pre | 0 days |
| 8 | Preliminary Investigation | 0 days |
| 9 | Assign resources to pre | 0 days |
| 10 | Develop preliminary inve: | 0 days |
| 11 | Evaluate the market | 0 days |
| 12 | Analyze the competition | 0 days |
| 13 | Technical Feasibility A | 0 days |
| 14 | Produce lab scale prc | 0 days |
| 15 | Evaluate internal prod | 0 days |

Two smaller Gantt charts are visible on the right side of the screen, labeled 'NEWPROD 1.mpp' and 'NEWPROD 2.mpp'. The 'NEWPROD 1.mpp' Gantt chart shows tasks with durations ranging from 0 to 766 days. The 'NEWPROD 2.mpp' Gantt chart shows tasks with durations ranging from 0 to 53 days. The Windows taskbar at the bottom shows the Start button and several open applications, including Internet Explorer, Word, and Outlook. The system clock indicates the time is 2:28 PM on 4/4/07.