"Rollup…Rollup Milestone Dates to the Project Center"
by Ira Brown

An important part of a project manager's job is to manage the dates for milestones and other key tasks in a project. The dates for these key tasks are monitored very closely by executives in an organization, and Project Web Access is an excellent tool to keep the management team informed about these tasks in your project.

The *Project Center* in Project Web Access allows you to create dashboard views to display high-level information about your project. However, in order to see detailed information about milestones and other key tasks, a user needs to "drill-down" from the Project Center to get the project details.

Wouldn't it be nice to be able to display the dates for key tasks and milestones in your project *directly* in the Project Center, without requiring executives to have to drill down to get to the details for your project? This article describes a step by step approach for how you can display the dates for these important tasks in a Project Center view, *eliminating* the need to drill-down into a project to get to the details. We will use the template "MSF Application Development" that is included with Microsoft Project as the basis for this example.

The way we will accomplish this feat is by creatively using Enterprise Custom fields to flag and rollup the dates for specific key tasks and milestones to the Project Summary Task (also referred to as "Row 0" in your project). Once we roll up these dates to the project summary level, we can then include them in a Project Center view.

NOTE: You must be set up as a member of the Administrators group in order to perform the steps described in this article.

Our Mission:

Suppose we would like to be able to include the following key dates from the "MSF Application Development" template in a Project Center view:

1. Completion of "Vision/Scope Frozen" milestone
2. Completion of "Feature Complete" milestone
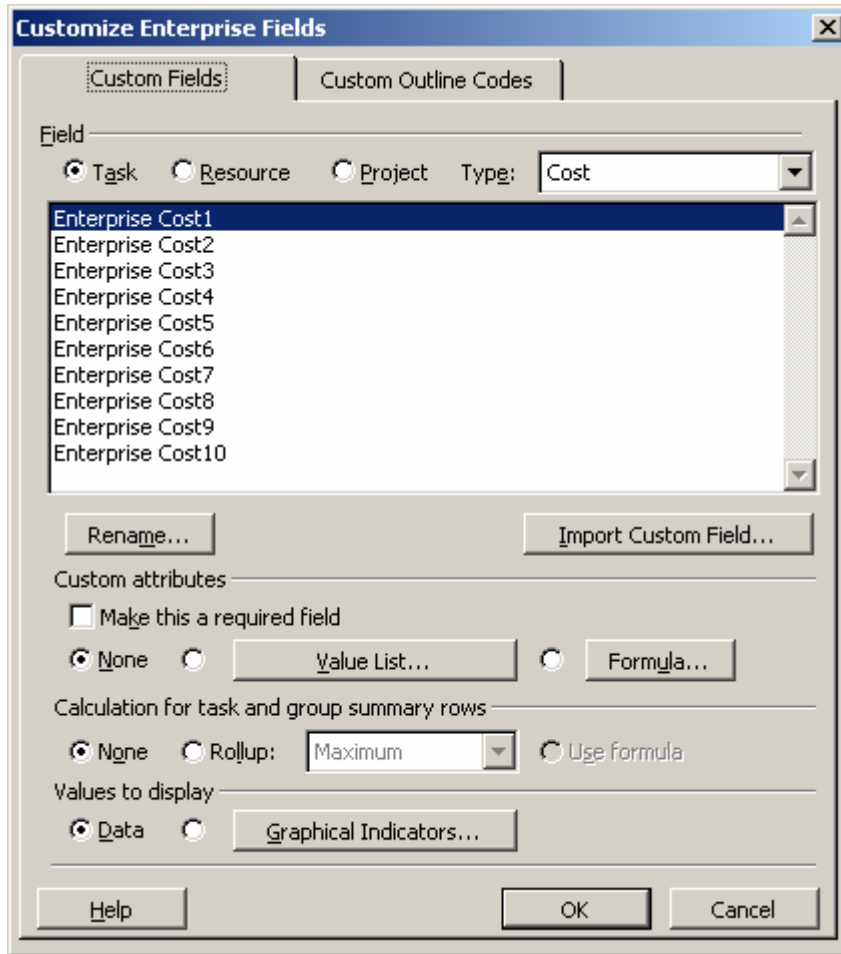3. Completion of "Golden Release" milestone

To accomplish this, follow the steps described in the remainder of this article.

A. Configuring the Enterprise Global

1. The first step is to use a series of flag fields to "mark" the tasks in your project that you want to roll up to the project summary level. We will need to define these fields in the Enterprise Global in Microsoft Project Professional. To accomplish this, select Tools…Enterprise Options…Open Enterprise Global from the menu. A screen similar to the following will be displayed:
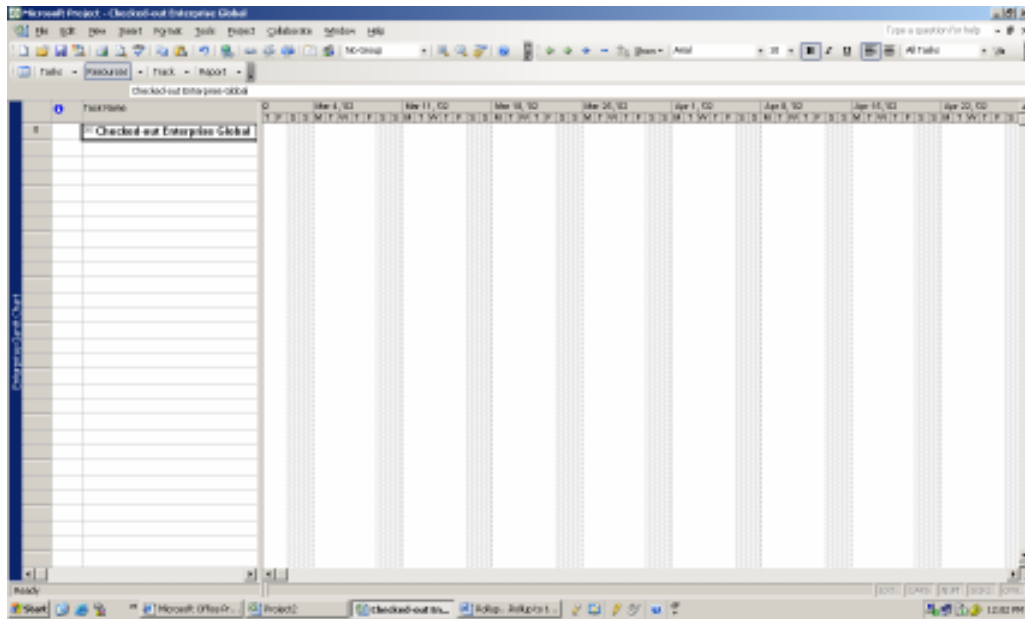
2. From the menu, select Tools…Customize…Enterprise fields. The following screen will be displayed:

Customize Enterprise Fields

Custom Fields | Custom Outline Codes

Field

○ Task ○ Resource ○ Project Type: Cost

Enterprise Cost1
Enterprise Cost2
Enterprise Cost3
Enterprise Cost4
Enterprise Cost5
Enterprise Cost6
Enterprise Cost7
Enterprise Cost8
Enterprise Cost9
Enterprise Cost10

Rename... Import Custom Field...

Custom attributes

☐ Make this a required field

● None ○ Value List... ○ Formula...

Calculation for task and group summary rows

● None ○ Rollup: Maximum ○ Use formula

Values to display

● Data ○ Graphical Indicators...

Help OK Cancel

3. On the "Customize Enterprise Fields" dialog box, select the "Task" option, and from the "Type" drop-down list, select "Flag". Select Enterprise Flag1, and click the "Rename" button. Name this field "Vision/Scope Frozen Flag", as shown below. Click OK on the "Rename Field" dialog box.
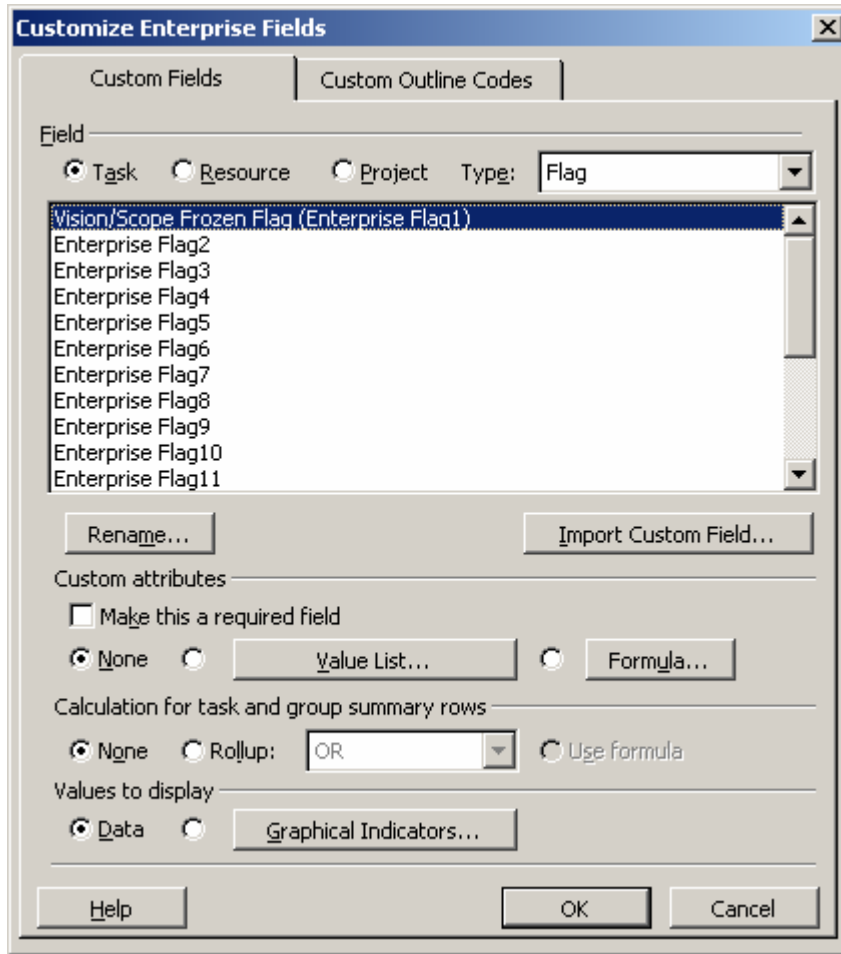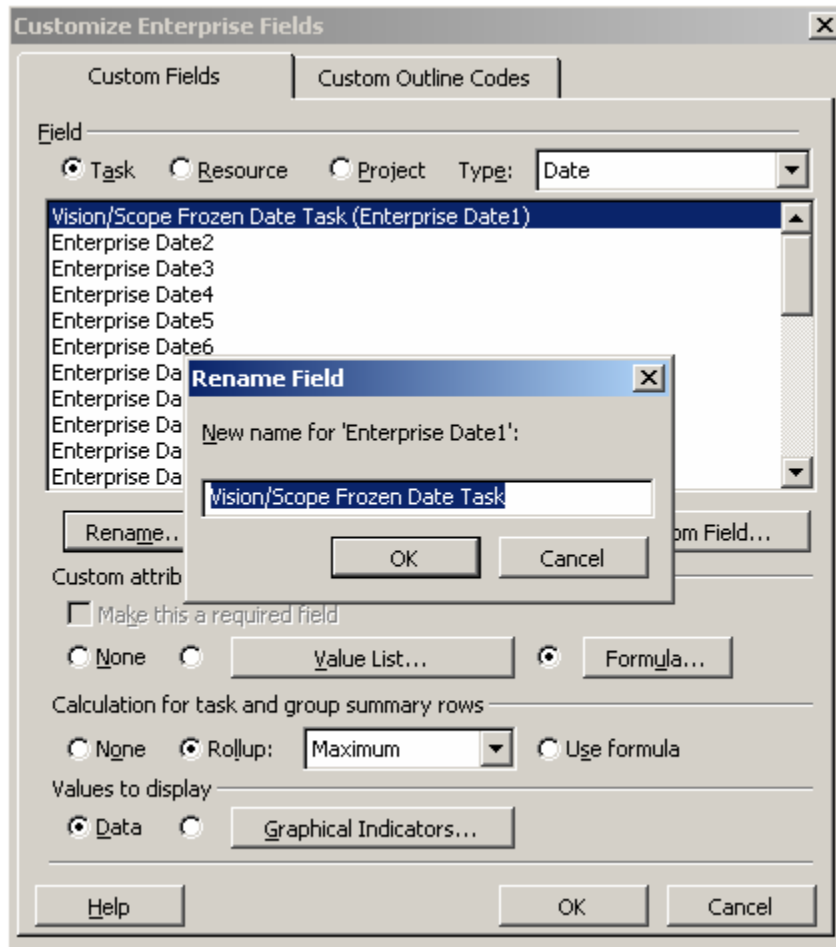
NOTE: You may use fields other than the ones used in this example if these fields are not available in your Enterprise Project environment.

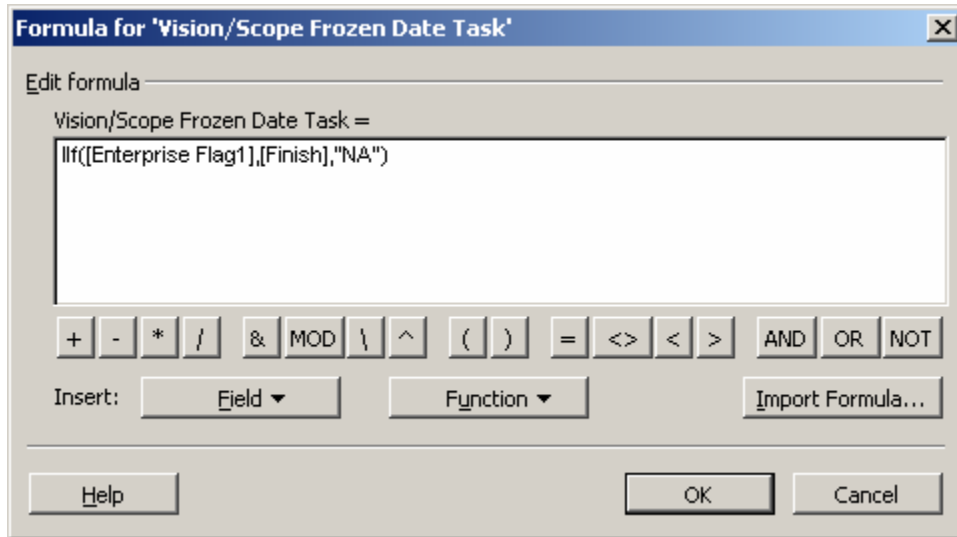4. Repeat step 3 above to create the following custom flag fields:

Enterprise Task Flag Field	New Name
Enterprise Flag1	Vision/Scope Frozen Flag
Enterprise Flag2	Feature Complete Flag
Enterprise Flag3	Golden Release Flag

5. The next step is to define a series of Enterprise Date fields that correspond to each of the flag fields we have created above. To do so, on the "Customize Enterprise Fields" dialog box, select the "Task" option, and from the "Type" drop-down list, select "Date". Select "Enterprise Date1", and click the "Rename" button. Name this field "Vision/Scope Frozen Date Task", as shown below. Click OK on the "Rename Field" dialog box.
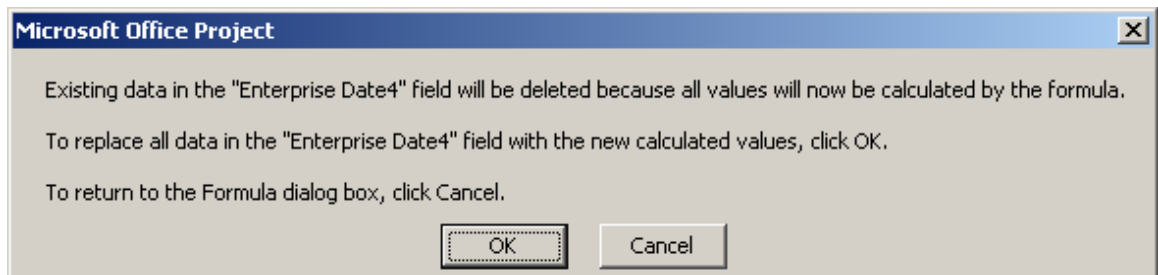
Customize Enterprise Fields

Custom Fields | Custom Outline Codes

Field

○ Task ○ Resource ○ Project Type: Date ▼

Vision/Scope Frozen Date Task (Enterprise Date1)
Enterprise Date2
Enterprise Date3
Enterprise Date4
Enterprise Date5
Enterprise Date6
Enterprise Da...
Enterprise Da...
Enterprise Da...
Enterprise Da...
Enterprise Da...

Rename Field

New name for 'Enterprise Date1':

Vision/Scope Frozen Date Task

OK | Cancel

Rename.. | ...om Field...

Custom attrib...

☐ Make this a required field

○ None ○ [Value List...] ● [Formula...]

Calculation for task and group summary rows

○ None ● Rollup: Maximum ▼ ○ Use formula

Values to display

● Data ○ [Graphical Indicators...]

Help | OK | Cancel

6. Next, we will define a formula for the Vision/Scope Frozen Date Task (Enterprise Date1) field. Select the "Vision/Scope Frozen Date Task (Enterprise Date1)" from the field list, and click the "Formula…" button. Type the following formula into the dialog box, as shown below:
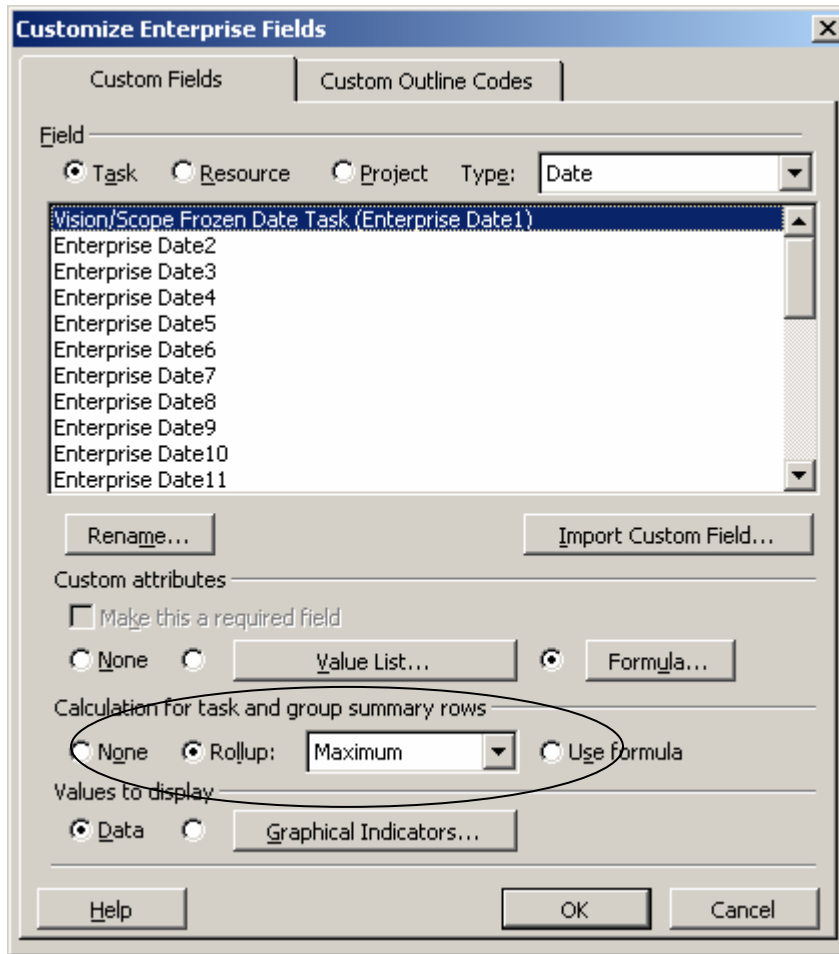
IIf([Enterprise Flag1],[Finish],"NA")

7. Click OK, and screen similar to the following dialog box will be displayed. Click OK to close this dialog box.

8. In the "Calculation for task and group summary rows" section, select "Maximum" for the "Rollup" option for this field (as shown below).

9. Repeat steps 5 - 8 above to create the following custom date fields:

Enterprise Task Flag Field	New Name	Formula
Enterprise Date1	Vision/Scope Frozen Date Task	IIf([Enterprise Flag1],[Finish],"NA")
Enterprise Date2	Feature Complete Date Task	IIf([Enterprise Flag2],[Finish],"NA")
Enterprise Date3	Golden Release Date Task	IIf([Enterprise Flag3],[Finish],"NA")

10. The next step is to define a series of *project* level Enterprise Date fields that correspond to each of the *task* level Enterprise Date fields we have created in this example. We will display these project-level date fields in a Project Center view, eliminating the need to have to drill down to see this information. To do so, on the "Customize Enterprise Fields" dialog box, select the "Project" option, and from the "Type" drop-down list, select "Date". Select "Enterprise Project Date1", and click the "Rename" button. Name this field "Vision/Scope Frozen Date", as shown below. Click OK on the "Rename Field" dialog box.
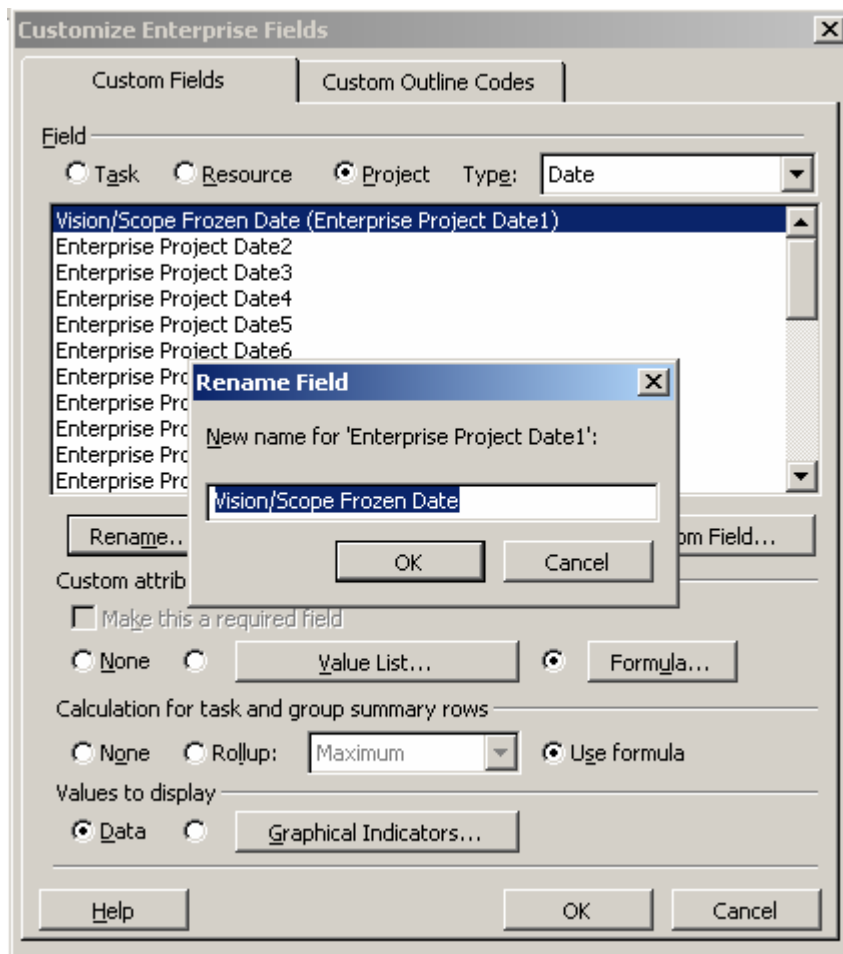
11. Next, we will define a formula for the "Vision/Scope Frozen Date (Enterprise Project Date1)" field. Select the "Vision/Scope Frozen Date (Enterprise Project Date1)" from the field list, and click the "Formula…" button. Type the following formula into the dialog box, as shown below:

> [Enterprise Date1]
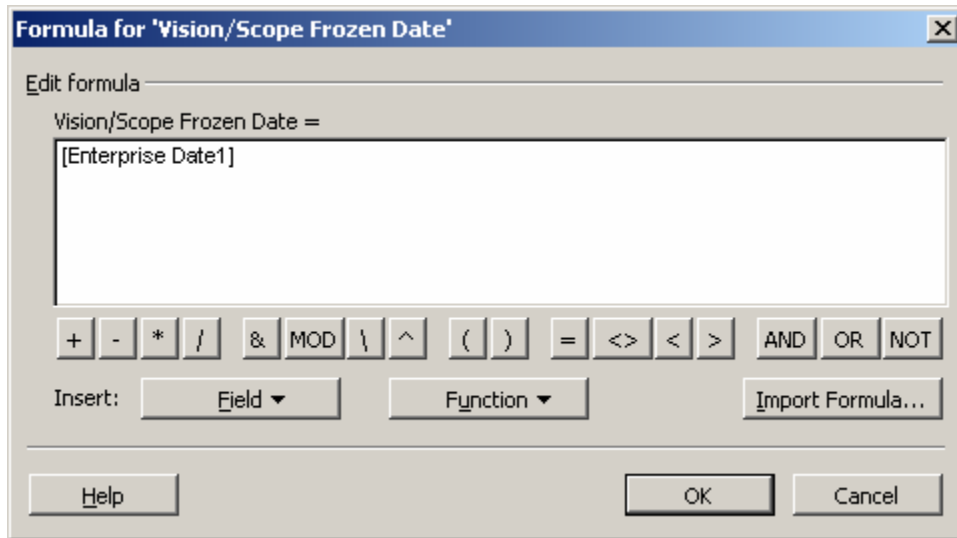
12. Click OK, and a screen similar to the following will be displayed. Click OK to close this dialog box.
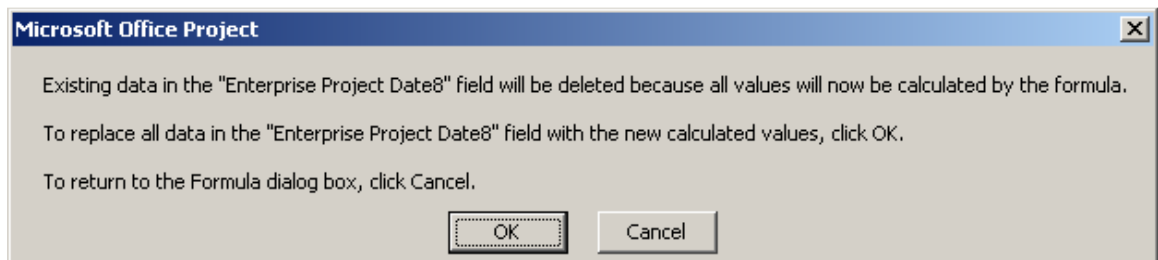

13. Repeat steps 10 - 12 above to create the following custom date fields:

Enterprise Task Flag Field	New Name	Formula
Enterprise Project Date1	Vision/Scope Frozen Date	[Enterprise Date1]
Enterprise Project Date2	Feature Complete Date	[Enterprise Date2]
Enterprise Project Date3	Golden Release Date	[Enterprise Date3]

14. Now that we have created all of our custom fields, the next step is to create a *table* that can be used for setting the flag values for the tasks in a project. To do so, from the menu, select View…Table…More Tables. The "More Tables" dialog box will be displayed.
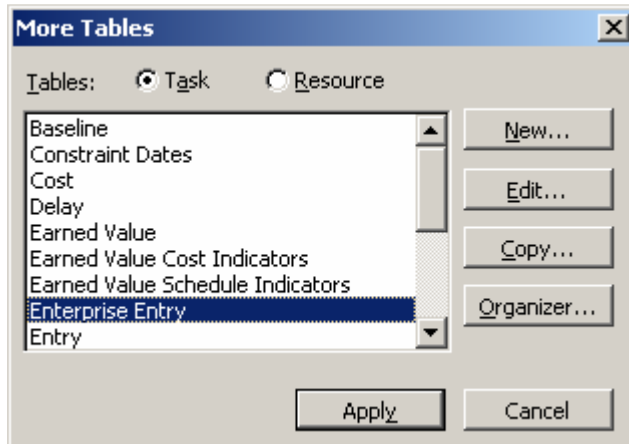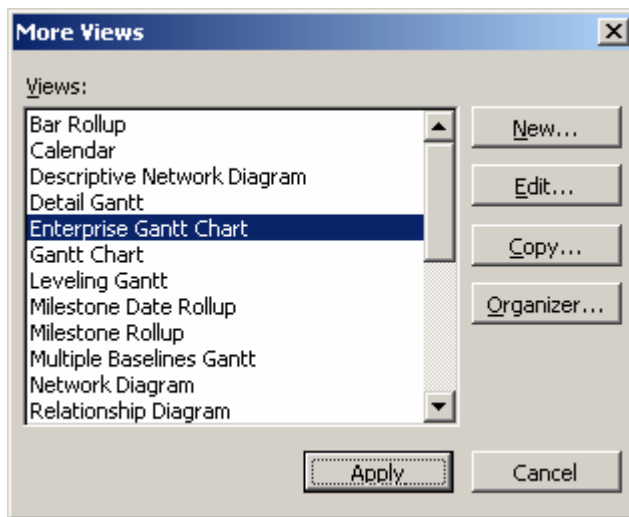

15. Click the "New…" button, and the "Table Definition" dialog box will be displayed, as shown below.
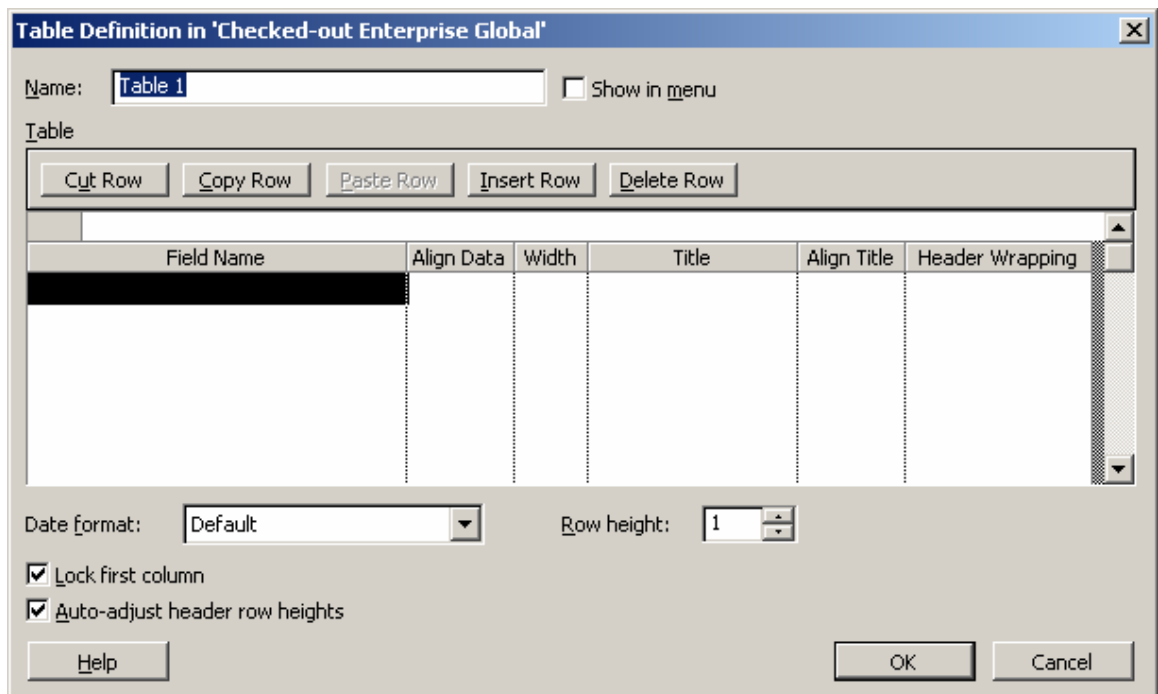
16. Name the table "Date Rollup Administration", and set up the table using the following information:

Field Name	Align Data	Width
ID	Center	6
Name	Left	50
Vision/Scope Frozen Flag	Right	22
Feature Complete Flag	Right	22
Golden Release Flag	Right	22

17. Click OK on the "Table Definition" dialog box, and click Close on the "More Tables" dialog box.
18. Next, we will create a view that includes the "Date Rollup Administration" table. From the menu, select "View…More Views…", and the following dialog box will be displayed:
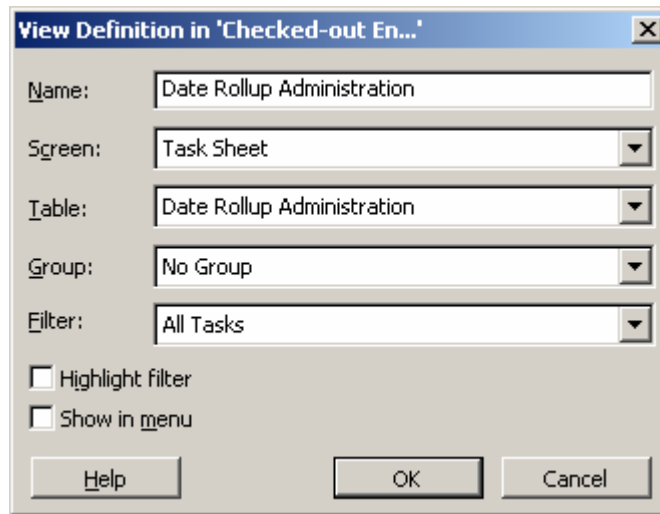

19. Click the "New…" button, and on the "Define New View" dialog box, select "Single view". Click OK.
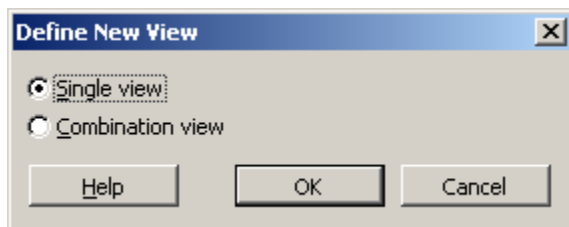
20. On the "View Definition" dialog box, enter the following information and click the "OK" button

| Field Name	Align Data
Name:	Date Rollup Administration
Screen:	Task Sheet
Table:	Date Rollup Administration
Group:	No Group
Filter:	All Tasks

21. From the menu, select File…Save to save the Enterprise Global.
22. Close Microsoft Project Professional.

B. Configuring Project Web Access

Next, we will create a Project Center view that will allow us to view the dates for our key tasks and milestones. To do so, use the following steps:

1. Open Project Web Access, and select Admin from the menu. Select Manage Views, and click the "Add View" button in the toolbar. On the "Specify Views" page, click the "Project Center" option in the "View Type" section, and the following page will be displayed:
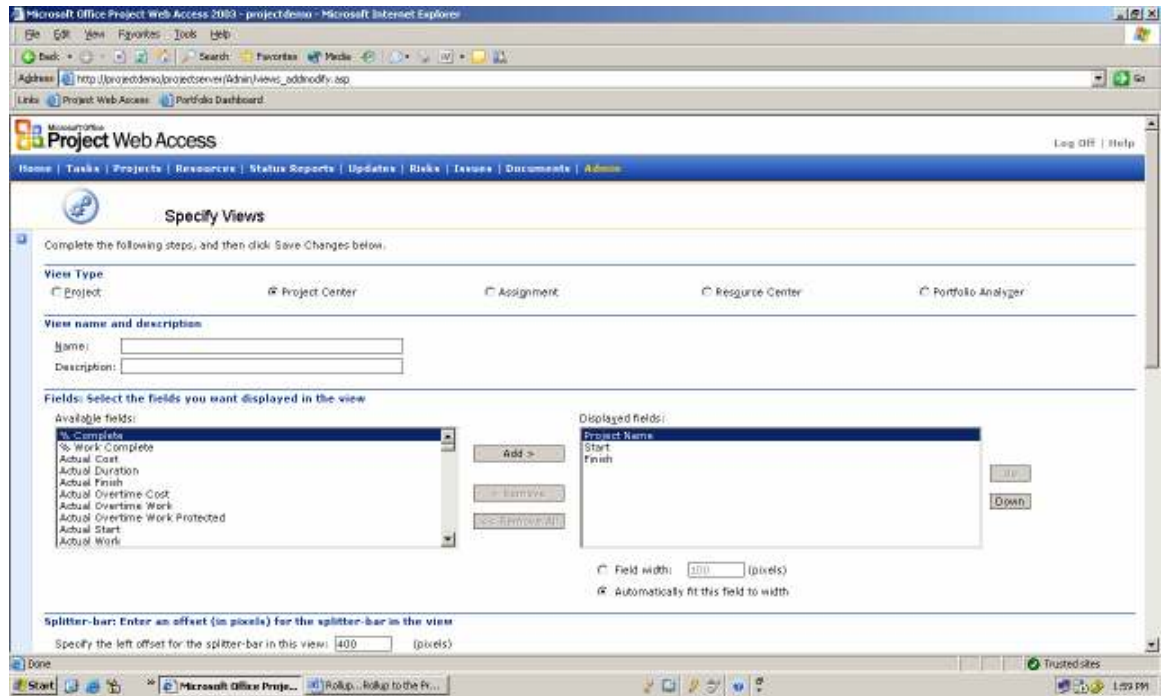
2. In the "Name" field, enter a name for your view such as "Project Dashboard".
3. In the "Fields" section of the page, in the "Available fields" list, select each of the Enterprise Date fields to be included in the Project Center view, and click the "Add" button to move the fields to the list of "Displayed fields" on the right side of the page. Add the following fields to the Project Center view.

   - Enterprise Project Date1 (Vision/Scope Frozen Date)
   - Enterprise Project Date2 (Feature Complete Date)
   - Enterprise Project Date3 (Golden Release Date)

4. In the "Categories" section at the bottom of the page, add the new view to the appropriate categories, such as "My Organization" and "My Projects", and click the "Save Changes" button.

## C. Setting up a Project to Display in the Dashboard

Now that our Microsoft Project environment is completely configured, we can now flag the key tasks and milestones in our projects so that their dates display in the Project Center view.

To set up a project, do the following:

1. Open Microsoft Project Professional, and open a project that you want to set up to display key dates in the Project Center.

   NOTE: To best follow along with our example, create a new project based upon the "MSF Application Development" template. You can get to this template by selecting "File…New" from the menu, selecting "On My Computer" from the templates section of the Task Pane, and clicking the "Project Templates" tab on the "Templates" dialog box.

2. From the menu, select "View… More Views", highlight the view called "Date Rollup Administration", and click the "Apply" button.
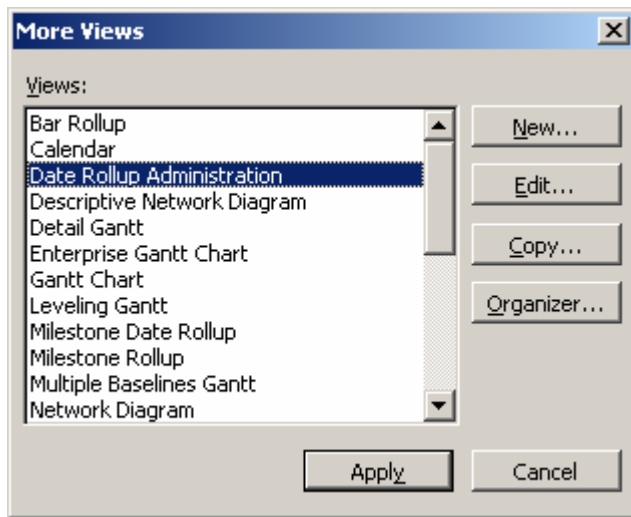
   NOTE: To make it easier to work with the milestones in your project, apply the "Milestone" filter to this view by selecting "Project…Filtered for:…Milestones" from the menu.

3. Next, identify the key tasks and milestones in your project by setting their corresponding flags to "Yes". For example, for the task "Vision/scope frozen", set the flag "Vision/Scope Frozen Flag" to "Yes" (as shown below)

		Name	Vision/Scope Frozen Flag	Feature Complete Flag	Golden Release Flag
1		⊟ **Project Kick-Off**	**No**	**No**	No
2		⊟ **Form Team**	**No**	**No**	**No**
7		Team formed	No	No	No
8		⊟ **Envisioning**	**No**	**No**	**No**
11		⊟ **Define Project Structure**	**No**	**No**	**No**
17		Project structure determined	No	No	No
34		Vision approved	No	No	No
35		⊟ **Planning**	**No**	**No**	**No**
38		⊟ **Functional Specification Creation**	**No**	**No**	**No**
43		Functional specification baseline	No	No	No
56		⊟ **Logistics Plan**	**No**	**No**	**No**
57		⊟ **Develop Logistics Plan**	**No**	**No**	**No**
62		Logistics plan complete	No	No	No
70		Project plan baseline established	No	No	No
71		⊟ **Consolidate Project Plans**	**No**	**No**	**No**
75		Determine ship date	No	No	No
76		Vision/scope frozen	Yes	No	No
78		Project plan approved	No	No	No
79		⊟ **Developing**	**No**	**No**	**No**
81		Equipment for development/proof of concept arrives	No	No	No
93		Internal release #1 complete	No	No	No
112		Feature complete	No	Yes	No
123		⊟ **Stabilizing**	**No**	**No**	**No**
125		⊟ **Beta Release 1**	**No**	**No**	**No**
129		Begin beta	No	No	No
132		Close beta support	No	No	No
134		End beta	No	No	No
139		Zero bug release	No	No	No
146		Golden release	No	No	Yes

Date Rollup Administration

4. Repeat step 3 above for each of the key tasks in your project. For the tasks used in this example, set the following flags to "Yes":

Task ID	Task Name	Flag Name	Value
76	Vision/scope frozen	Vision/Scope Frozen Flag	Yes
112	Feature complete	Feature Complete Flag	Yes
146	Golden release	Golden Release Flag	Yes

5. Save and close your project, and repeat steps 1 – 4 for each of your projects.

NOTE: In order to minimize the administration associated with this functionality, consider pre-setting these flags in the project templates used by your organization.

D. Viewing Your Project Dashboard

Once you have configured your Enterprise Project environment and set up the flags in your projects, you are now ready to view the "Project Dashboard" view you configured as a Project Center view in Section B of this article.

1. Open Project Web Access, and select "Projects" from the menu.
2. From the "Choose a view" drop-down list, select the "Project Dashboard" view. Notice that the dates for key tasks in your projects are displayed in the Project Center, and no longer does an executive in your organization need to drill-down for every project to see this information!
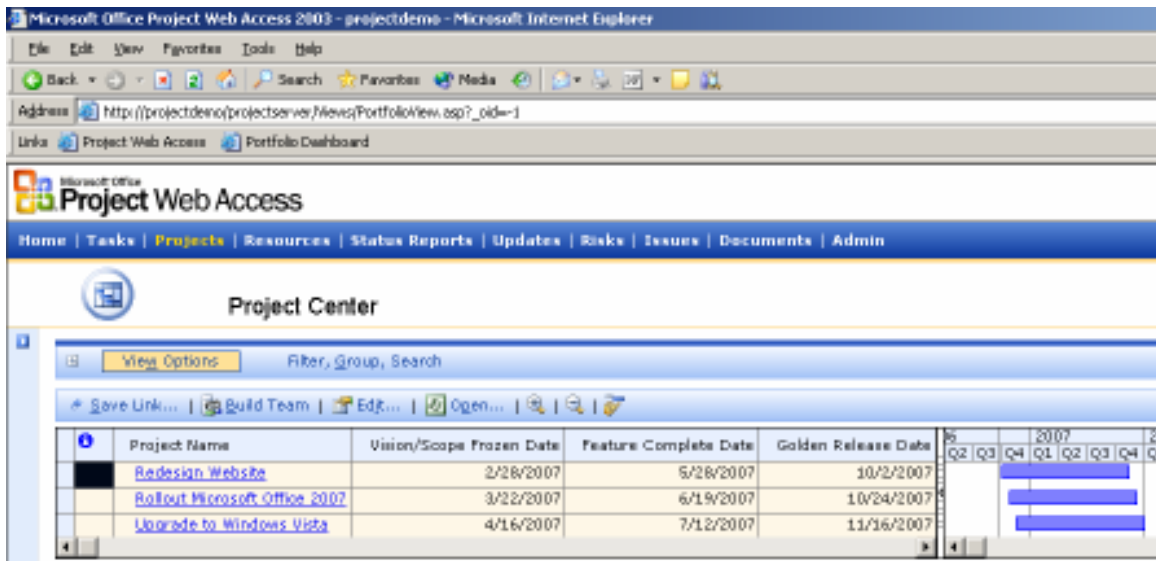
About the Author:
Ira Brown is the founder and president of Project Widgets, and specializes in custom solutions and add-ons for Microsoft Project. If you can imagine it, Project Widgets can build it. Two of his passions in life are Microsoft Project and the Beatles, and sometimes, the two even *come together*.