

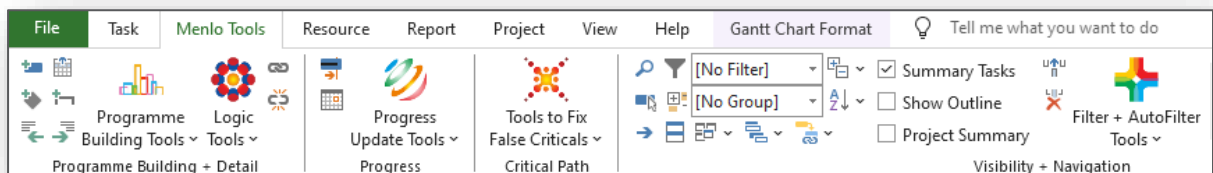


## Menlo Tools For Project

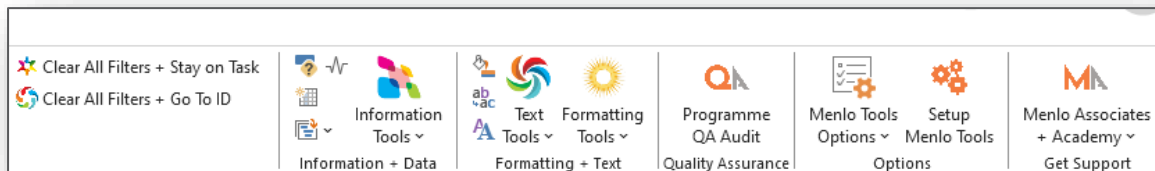
Thank you for downloading **Menlo Tools for Project**.

Here is a quick guide on the sections, buttons and tools included within the ribbon. The order of the buttons within this document run left to right. The ribbon includes tools built exclusively for the needs of the construction industry and for the purpose of programming and managing projects of all sizes. Our ribbon also includes tools you can already find in MS Project for the ease and convenience of having everything you need within one place.

### The Left Side of the Ribbon



### The Right Side of the Ribbon



### Key

**Grey** - Pre-existing MS Project tools.

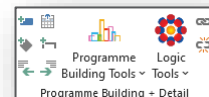
**Orange** - Menlo our custom tools.







**Title** - Menu title or section.

➤ - signifies a dropdown menu.

• - signifies a button/tool

## Programme Building + Detail



-  • **Insert Task**  
Insert a new Task above the selected Task.
-  • **Insert Blank Row**  
Insert a new Blank Row above the selected Task.
-  • **Insert Milestone**  
Insert a Milestone Task to mark an event in Project.
-  • **Insert Summary Task**  
Insert a Summary Task to help organise the Task List.
-  • **Outdent Task**  
Outdent a Task, which may make it into a Summary Task.
-  • **Indent Task**  
Indent a Task to become a Subtask.



### ➤ Programme Building Tools

Tools to assist in building your Programme with new Tasks.

### Correspondence Track Tools



- **Insert an RFI/CAN/CI Sequence**  
Insert an RFI chain of correspondence mapping response times.



- **Import CIs from an Excel Sheet**  
Add new tasks into your programme to detail Contract Instruction CI correspondence and placeholders for variation works, using data taken from an Excel spreadsheet.

### Tools for Multiple Unit Builds



- **Create a Multiple Unit Sequence**  
Using one fully planned unit, create a fully Task and resource driven multiple unit methodology for a given number of units.



#### **Link Task Groups in Parallel**

Use when converting an existing multiple unit sequence from the usual Task driven methodology into a Trade driven sequence.

The Tool creates a summary for each task within the active selection. The new summary tasks now provide a collection point for each Task across the multiple units build



- **Add New Summary to each Selected Task**  
Adds a summary task to each task within an active selection. The new summary tasks will have the same Name as the tasks they summarise.



## ➤ Logic Tools

Tools to assist in dealing with the logical relationships in your Programme.

### Adding Logic To Tasks



- **Add a Predecessor to Many Tasks**  
Add a Predecessor to a number of selected Tasks



- **Add a Successor to Many Tasks**  
Add a Successor to a number of selected Tasks

### Tracing Logic



- **Trace Predecessor Logic**  
Displays a progressive step by step chain of Predecessors one level at a time.



- **Clear Traced Logic**  
Clears the above traced logic chain

### Logic Problems



- **Identify Circular Logic Loop**  
Identifies the circular logic chain preventing 2 tasks from being directly linked.

### Looking at Predecessors



- **Selected Task + Predecessors (X Levels)**  
Filter to show the selected task and its logical Predecessors to several Levels of your choice.



- **Selected Task + Predecessors (All Levels)**  
Filter to show the selected task and its logical Predecessors to all Levels.



- **Selected Task + Driving Predecessors (X Levels)**  
Filter to show the selected task and its Driving Predecessors to a number of Levels of your choice.



- **Selected Task + Driving Predecessors (All Levels)**  
Filter to show the selected task and its Driving Predecessors to the maximum number of possible Levels.

### Looking at Successors



- **Selected Task + Successors (X Levels)**  
Filter to show only the selected task and its logical Successors to several Levels of your choice.



- **Selected Task + Successors (All Levels)**  
Filter to show only the selected task and its logical Successors to all Levels.



- **Selected Task + Driven Successors (X Levels)**  
Filter to show only the selected task and its Driven Successors to a chosen number of levels.



- **Selected Task + Driven Successors (All Levels)**  
Filter to show only the selected task and all its Driven Successors.

### Looking at Predecessors + Successors



- **Selected Task + Predecessors + Successors (X Levels)**  
Filter to show only the selected task and its Predecessors and Successors each to several Levels specified by you.



- **Selected Task + Predecessors + Successors (All Levels)**  
Filter to show only the selected task and its Predecessors and Successors each to their maximum Levels.



- **Selected Task + Driving Predecessors + Driven Successors X Levels**  
Filter to show only the selected task and its Predecessors and Driven Successors each to a number of Levels specified by you.



- **Selected Task + Driving Predecessors + Driven Successors All Levels**  
Filter to show only the selected task and its Predecessors and Driven Successors each to the maximum number of Levels.

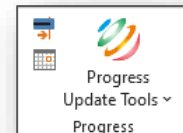


- **Link The Selected Tasks**  
Link Tasks so one can't start until the other one has finished.



- **Unlink Tasks**  
Remove the link between the selected Tasks.

## Progress



- **Mark on Track**  
Insert a new Task above the selected Task.
- **Status Date**  
Set the status date to report progress of the project



### ➤ % Complete Tools

Tools to assist in dealing with the logical relationships in your Programme.



### Using a Selection



- **Improved Mark Selection 100%**  
Mark each Task in selection as 100% complete.

### Find Invalid Dates



- **Show Incomplete Work Before Status Date**  
Detect and optionally fix any Tasks with incomplete work portions before the Status date.

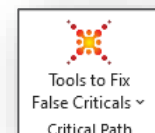


- **Show Complete Work After Status Date**  
Detect and optionally fix any Tasks with complete work portions before the Status date..

## Critical Path

### ➤ Tools to Fix False Criticals

Tools to assist in dealing with the logical relationships in your Programme.



### Automatic

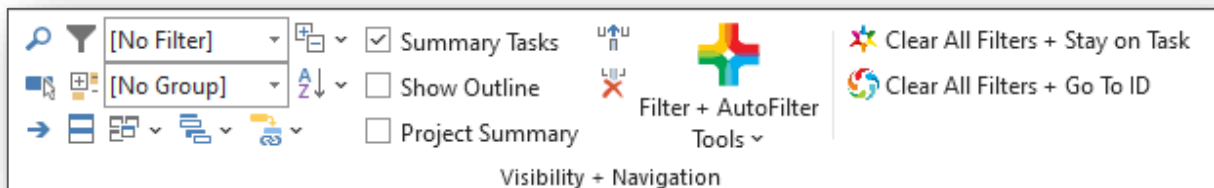
- **Fix All False Criticals**  
Apply an automatic false critical find and fix procedure to all tasks in the programme and gives a readout of what it finds and fixes.



















### Manual

- **Fix This False Critical**  
Filters to show only a selected task and any of its Successors that it detects are causing it to become a false critical, before asking if you want to apply a fix for each contributing Successor.

## Visibility + Navigation



- 
  - **Find (Ctrl+F)**  
Find and replace text using advanced search features.
- 
  - **Filter**  
Filter the view based on the selected criteria.
- 
  - **Show Outline**  
Specify which outline view should be used in the view.
- 
  - **Summary Tasks**  
Display Summary Tasks in the view.
- 
  - **Insert Column**  
Insert a new Column in the view.
- 
  - **Scroll to Task (Ctrl+Shift+F5)**  
Move to the area on the view containing the task bar for the selected item.
- 
  - **Group By**  
Group the items in the view by specified criteria.
- 
  - **Sort**  
Arrange the items in the view.
- 
  - **Show Outline**  
Show the outline number next to the Task name.
- 
  - **Hide Column**  
Remove the selected column in the view.
- 
  - **Go To (Ctrl+G)**  
Jump to a specific ID in your file.
- 
  - **Arrange All**  
Stack all your open windows so you can view them at once.
- 
  - **Switch Windows**  
Quickly switch to another open window.
- 
  - **Baseline**  
Show a bar to represent the baseline.
- 
  - **Highlight Task Path**  
Highlight Tasks that are linked to the selected Task.
- 
  - **Project Summary**  
Show the Summary task for the project.



## ➤ **Filter + AutoFilter Tools**

Various tools that allow you to Filter or AutoFilter for different criteria faster than usual.

### Filters



- **All Tasks with These Names**  
Filter to only show tasks with the same Name as any you have selected.



- **All Tasks where the Name Contains**  
Filter to only show tasks where the Name field contains text that you supply.



- **All Tasks where a Custom Field Contains**  
Filter to only show tasks where a Custom Field of your choosing contains text/values that you supply.



- **Selected Task + All Tasks where the Name Contains**  
Filter to only show the selected task, plus any tasks where the Name field contains text that you supply.



- **Selected Task + All Tasks where Custom Field Contains**  
Filter to only show the selected task, plus any tasks where a Custom Field of your choosing contains text/values that you supply.



- **All Tasks with Unique IDs on an Excel list**  
Filter to only show tasks whose Unique IDs match against a list or range of values within an Excel file.

### AutoFilters



- **All Tasks with This Name**  
AutoFilter on the Name field to only show tasks with the same Name as the selected task.



- **Clear 'All Tasks with This Name' + Stay on Task**  
Clear all Filters and navigate back to the task you had selected.



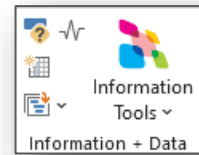
- **Clear All Filters + Stay on Task**  
Clear all Filters and navigate back to the task you had selected when you pressed the button.



- **Clear All Filters + Go To ID**  
Clear all Filters and navigate to a chosen task ID. If no task is selected, all Filters will clear but you are taken to the top of the project.



## Information + Data



- **Inspect Task**  
Show the Task Inspector to see factors affecting the Task's start date.



- **Project Statistics**  
View a snapshot of your project's original plan.



- **Custom Fields**  
Show the Custom Fields dialogue box to create custom fields to store information specific to your organisation.



- **Set Baseline**  
Take a snapshot of your schedule that includes information about tasks, resources, and assignments.



### ➤ Information Tools

Tools to get or find out information about the project or its Tasks.

### Edit information on a Task



- **Mark Selected Tasks**  
Set the Marked field of all selected tasks to 'Yes'.



- **Unmark Selected Tasks**  
Set the Marked field of all selected tasks to 'No'.



- **Unmark All Tasks**  
Set the Marked field of all tasks in the project to 'No'.



- **Open/Close Marked Summary Tasks**  
Open, or close, all summary tasks with 'Yes' on the Marked field.

### See information about a Task



- **Show WBS Hierarchy of a Task**  
Enter a task ID and get a read-out of its summary task hierarchy its WBS hierarchy.

## Save/Load information about the Project



- **Save Open/Closed State of Summaries**  
Save the current state open or closed of all summary tasks in the Project.
- **Load Open/Closed State of Summaries**  
Load the current state open or closed of all summary tasks in the Project.



## See information about the Project



- **Get a Count of Project Task Types**  
Get a count of:
  - all the Tasks in the Project.
  - Complete Tasks.
  - Incomplete Tasks.
  - Summary Tasks.
  - Milestones.
  - Normal tasks not a summary task or milestone.

## Transfer information between Projects



- **Transfer Baseline Between Projects**  
Select and transfer a baseline between two open Project files.



- **Transfer Critical Revisions Between Projects**  
Transfer Critical Revision information between two open Project files.  
This tool uses and relies on the follow Custom Fields:
  - Text26 as 'Critical Revision'
  - Number10 as 'Menlo Tools Tag' saving a past summary state, you cannot reload that past state with this tool.

## Import information into the Project



- **Create Calendar using Dates from an Excel Sheet**  
Create a new Calendar that takes holidays or other non-working days that are defined in an Excel sheet.

## Formatting + Text



- **Format Gantt Bar**

Change the visual style of either the Gantt bar for the selected task or a particular type of bar for the entire view.



- **Replace (C+H)**

Search for text you'd like to change and replace with something else.



- **Text Styles**

Change the visual style of the text for a particular item in the view.



➤ **Text Tools**

Tools to assist in adding text to the various Fields associates with Tasks.

### Insert Text Before



- **Names of Selected Tasks**

Insert new text at the end of what is already present on the Name field for all selected tasks.



- **Custom Field Values of Selected Tasks**

Insert new text at the end of what is already present on a Custom Field of your choosing for all selected tasks.

### Insert Text After



- **Names of Selected Tasks**

Insert new text at the end of what is already present on the Name field for all selected tasks.



- **Custom Field Values of Selected Tasks**

Insert new text at the end of what is already present on a Custom Field of your choosing for all selected tasks.

### Overwrite



- **Names of Selected Tasks**  
Overwrite the current text present on the Name field for all selected tasks.



- **Custom Field Values of Selected Tasks**  
Overwrite the current text/values present on a Custom Field of your choosing for all selected tasks.



- **Notes of Selected Tasks**  
Overwrite the current Notes text for all selected tasks.



### ➤ **Formatting Tools**

Tools to assist in the creation of new views.

#### **Gantt Views**



- **Create a New Daily View**  
Create and name a new Daily View using a default Menlo format.



- **Create a New Monthly View**  
Create and name a new Monthly View using a default Menlo format.

#### **Formatting to Task Table**



- **Format Summary Tasks to Menlo Palette - Blue**  
Format all summary tasks based on Outline Level, using a blue palette theme tailored by Menlo.



- **Format Summary Tasks to Menlo Palette - Green**  
Format all summary tasks based on Outline Level, using a green palette theme tailored by Menlo.



- **Format Summary Tasks to Menlo Palette - Red**  
Format all summary tasks based on Outline Level, using a red palette theme tailored by Menlo.



- **Format Summary Tasks to Menlo Palette - Orange**  
Format all summary tasks based on Outline Level, using an orange palette theme tailored by Menlo.

## Quality Assurance

### ➤ Programme QA Audit

Spot any errors, fix issues and ensure your Programme is up to industry standards by running 27 different tests with our handy QA tool.



### The QA Audit Tests Include:

#### Programme Settings/Sense Checks

- **New Tasks are 'Auto Scheduled'**  
Ensures that, by default, new tasks are Auto Scheduled and not Manually Scheduled, allowing Project to calculate their Start and Finish dates properly for you.
- **New Tasks are 'Fixed Work', or 'Fixed Units and Effort Driven'**  
Ensures that, by default, new tasks will have their Durations calculated on the basis of the amount of Work it has, and the level of Resource applied to do it, facilitating your ability to plan accurately.
- **Project Options correctly handle task progress landing after Status Date**  
Ensures that, when doing a status update, the complete and incomplete portions of a task are automatically treated correctly with respect to the status date. Specifically, this test deals with how marked progress affects tasks that were planned to progress before the status date.
- **Project Options correctly handle task progress landing before Status Date**  
Ensures that, when doing a status update, the complete and incomplete portions of a task are automatically treated correctly with respect to the status date. Specifically, this test deals with how marked progress affects tasks that were planned to progress after the status date.
- **Correct Status Date has been set**  
Provides a sense check to ensure that the correct status date has been set in the project, and that QA Audit is measuring against the true/intended status date.
- **Project Summary Task is Showing**  
Ensures that the Project Summary Task is showing, allowing you to always quickly verify the earliest and latest dates in the programme.

#### Automatic Audit Tests

- **New Tasks are No Summary Tasks with Logic**  
Checks for the presence of logical Predecessors and Successors on your summary tasks.
- **No Summary Tasks with Resources**  
Checks for the presence of Resources on your summary tasks
- **No Start-to-Finish (SF) Relationships on Tasks**  
Checks for the presence of Start-To-Finish SF task relationships in your project.
- **No Tasks with Hard Constraints**  
Checks for Hard Constraints on the tasks of your project.
- **Too many Tasks with Lags**  
This test checks for the presence of Lags within the task relationships of your project.

- **No Tasks with Leads (Negative Lags)**  
Ensures that the Project Summary Task is showing, allowing you to always quickly verify the earliest and latest dates in the programme.
- **No Tasks with Missing Successors**  
This test is designed to identify tasks that lack the Successor relationships they should ideally possess.
- **No Tasks with Missing Predecessors**  
This test searches for tasks that are missing Predecessor relationships that shouldn't be.
- **No Tasks with Work without Resources**  
This test searches for tasks that have Work assignments but lack Resource assignments.
- **Too many Tasks with Duration above 20 working days**  
This test searches for tasks with a Duration greater than 20 working days.
- **No Manually Scheduled Tasks**  
This test searches for tasks that are Manually Scheduled.
- **No Incomplete Work Before the Status Date**  
This test searches for tasks that are Manually Scheduled.
- **No Complete Work After the Status Date**  
This test searches for tasks with complete portions of work sitting after the status date.
- **No False Criticals**  
This test searches for the presence of False Critical tasks in your programme.
- **Current Critical Revision correctly logged in the Critical Revision column**  
This test checks for the presence of issues with how the current Critical Revision has been recorded in the project.
- **New Baseline Saved with current Status Date**  
This test checks for whether a Baseline has been saved with the date of the current update within its saved date. Doing this aligns with best programming practices from Menlo's perspective.
- **No Tasks Flagged as Estimated e.g. Duration = "1 day?", not "1 day"**  
This test checks for Estimated tasks, which Menlo aims to keep to a minimum for alignment with best programming practices.

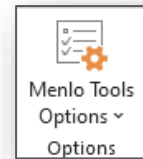
### Items to Check and Confirm

- **Important RFIs added and linked**  
A checkbox/reminder for you the programmer to confirm that you've added and linked any and all important/relevant contractual Request for Information (RFI) chains for the current status update.
- **Important NODs added and linked**  
A checkbox/reminder for you the programmer to confirm that you've added and linked all important/relevant contractual Notice of Delay (NOD) chains for the current status update.
- **Important CIs added and linked**  
A checkbox/reminder for you the programmer to confirm that you've added and linked all important/relevant contractual Contract Instruction (CI) chains for the current status update.
- **Progress updated on all Tasks**  
A checkbox/reminder for you the programmer to confirm that you've updated the progress on all relevant tasks for the status update.

## Options

### ➤ Menlo Tools Options

Tools to assist in dealing with the logical relationships in your Programme.



### Button Layouts



- **Hide Built-In Buttons**

Toggle whether you can see Project's 'built-in' buttons/commands on the Menlo Tools tab.



- **Setup Menlo Tools from Template**

Open Menlo's template project file which contains instructions on the setup needed to use Menlo Tools for Project.



### ➤ Setup Menlo Tools

As part of your installation, you will have a project file included that contains the Custom Field setup required to use Menlo Tools for Project. You'll need to move these Custom Fields to your Global Template.

Select 'Yes' to open this .MPP file and our .PDF file which will guide you through the process.

## Get Support

### ➤ Menlo Associates + Academy

Tools to assist in dealing with the logical relationships in your Programme.



### Need some help?



- **JustAsk@Menlo-Academy.com**

Send an email with any questions you have. This will open your preferred emailing application.

### Training Options



- **Train With Us @ Menlo-Academy.com**

See the training services we offer. This will open your preferred browser.

### About Us



- **About Us @ Menlo-Associates.co.nz**

Learn more about us and the consultancy services we offer. This will open your preferred browser.

### Our Free Resources



- **Videos @ Menlo-Academy.com**

Browse our free MS Project training videos. This will open your preferred browser.



- **Calculators @ Menlo-Academy.com**  
Browse our free calculators to obtain duration estimates for your programme. This will open your preferred browser.



- **Labour Factors @ Menlo-Academy.com**  
Browse and use our free library of labour factors to put more detail into your duration estimates. This will open your preferred browser.