



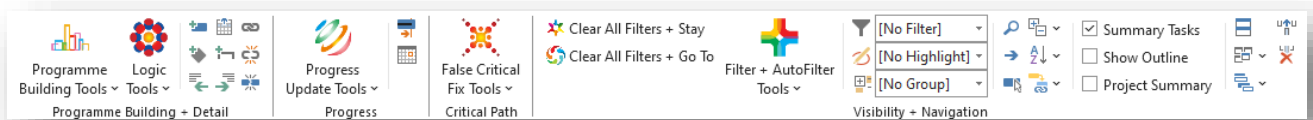
<b>Key</b>	
Grey	Pre-existing MS Project tools
Orange	Our custom tools
<b>Title</b>	Menu title or section
➤	Signifies a dropdown menu

## Menlo Tools For Project

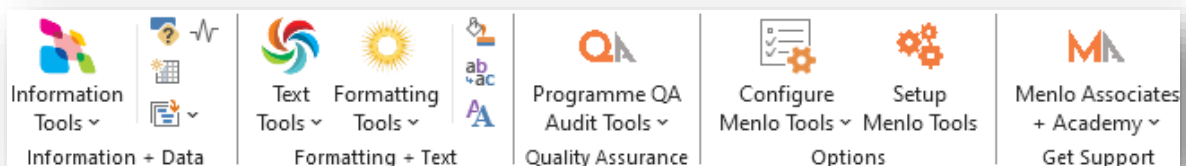
Thank you for downloading [Menlo Tools for Project](#).

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



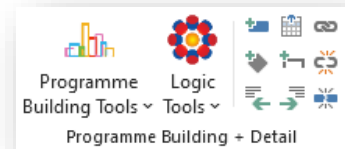
### The Right Side of the Ribbon



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## Programme Building + Detail



### ➤ 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.



##### **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.



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

Use when adding resource links across multiple unit sequences. Add parallel links between two groups of tasks. - A to A, B to B, C to C, etc.



### ➤ 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



##### **Link Selected Tasks where the Name Contains**

Link any tasks within a selection in sequence if their Names contain specified text.

#### 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 the maximum number of possible Levels.



**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 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.



**Insert Task**

Insert a new Task above the selected Task.



**Insert Blank Row**

Insert a new Blank Row above the selected Task.



### ***Link The Selected Tasks***

Link Tasks so one can't start until the other one has finished.



### ***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.



### ***Unlink Tasks***

Remove the link between the selected Tasks.



### ***Outdent Task***

Outdent a Task, which may make it into a Summary Task.



### ***Indent Task***

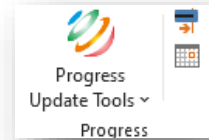
Indent a Task to become a Subtask.

## **Progress**



### ➤ **% 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.



### ***Mark on Track***

Insert a new Task above the selected Task.



### ***Status Date***

Set the status date to report progress of the project

## Critical Path

### ➤ Tools to Fix False Criticals

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



#### **Automatic**



##### **Fix All False Criticals**

Applies an automatic false critical find and fix procedure to all tasks in the programme and gives a readout of what it finds and fixes.

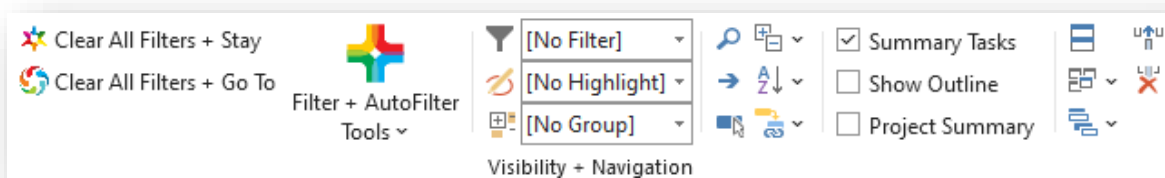
#### **Manual**



##### **Fix This False Critical**

Filters to show only a selected task and any Successors that may be causing a false critical, before asking if you want to apply a fix for each contributing Successor.

## Visibility + Navigation



##### **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.



### ➤ 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.



#### All Tasks with Overallocated Resources

Filter to only show tasks that have an assigned Resource that is overallocated.

#### **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.



#### **Filter**

Filter the view based on the selected criteria.



#### **Highlight**

Highlight items in the view based on the selected criteria.



#### **Group By**

Group the items in the view by specified criteria.



#### **Find (Ctrl+F)**

Find and replace text using advanced search features.



#### **Show Outline**

Specify which outline view should be used in the view.



#### **Go To (Ctrl+G)**

Jump to a specific ID in your file.



#### **Sort**

Arrange the items in the view.



#### **Scroll to Task (Ctrl+Shift+F5)**

Move to the area on the view containing the task bar for the selected item.



#### **Highlight Task Path**

Highlight Tasks that are linked to the selected Task.



#### **Summary Tasks**

Display Summary Tasks in the view.



#### **Show Outline**

Show the outline number next to the Task name.



#### **Project Summary**

Show the Summary task for the project.




#### **Arrange All**

Stack all your open windows so you can view them at once.



#### **Insert Column**

Insert a new Column in the view.

 **Switch Windows**  
Quickly switch to another open window.

 **Hide Column**  
Remove the selected column in the view.

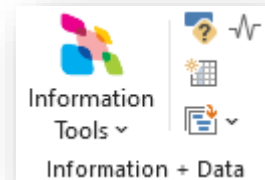
 **Baseline**  
Show a bar to represent the baseline.

## Information + Data



### ➤ Information Tools

Tools to that enable you to find information about the project or its Tasks.



#### Task Information



##### **Show WBS Hierarchy of a Task**

Enter a task ID and get a read-out of its summary task hierarchy its WBS hierarchy.



##### **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.



##### **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.



##### **Show Estimated Tasks**

Show Estimated Tasks, and optionally set them all to no longer be Estimated.

#### Project Information



##### **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.

## **Resources**



### **Suggest Alternative Resources for Overallocated Task**

Inspect the current task for Resource Overallocation and choose from suggested alternatives to solve the Overallocation.

## **Baselines**



### **Transfer Baseline Between Projects**

Select and transfer a baseline between two open Project files.



### **Open Baseline for Edits**

Quickly open the Start, Finish and Duration columns for a specified baseline. Also allows you to quickly change the date format to display date and time, which is useful for baseline edits.

## **Critical Revisions**



### **Transfer Critical Revisions Between Projects**

Transfer Critical Revision information between two open Project files.

This tool uses and relies on the following 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.



### **Add Critical Revision Entry**

Add an entry to the Critical Revision field of each selected task.



### **Remove Critical Revision Entry**

Remove entry from the Critical Revision column.

## **Calendars**



### **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.



### **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.

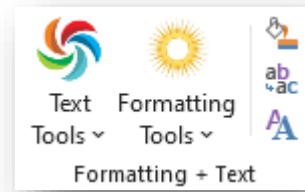


## Formatting + Text



### ➤ Text Tools

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



#### Corrections



##### **Correct Names with Double Spaces**

Find all Tasks where the name contains a double space, and optionally fix all instances.



##### **Correct Names with Leading Spaces**

Find all Tasks where the name starts with leading space(s), and optionally fix all instances.



##### **Correct Names with Trailing Spaces**

Find all Tasks where the name ends with trailing space(s), and optionally fix all instances.



##### **Correct Uncapitalised Names**

Find all Tasks where the name contains a double space, and optionally fix all instances.

#### 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 and formatting the colours of Tasks.

### **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.

### **Team Planner Formatting**



#### **Mark Critical Path in Team Planner**

Format tasks on the Critical Path to have a red fill colour within the Team Planner.

### **Date Format**



#### **Change Date Format**

Change the date format faster than using the settings in Project Options.



#### **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.

## Quality Assurance

### ➤ Programme QA Audit Tools

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



### Programme QA



#### 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.



#### Retrieve QA Audit Window

Retrieve the Programme QA Audit dialog box if it has disappeared somewhere you can't see on your desktop.

## Programme QA Audit Includes:

### **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 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



### ➤ Configure Menlo Tools

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



### Button Layouts



#### Hide Built-In Buttons

Toggle Project's built in buttons on the Menlo Tools ribbon.

### Button Layouts



#### Check for Update

Run to see if you're using the latest version of Menlo Tools.



#### View Changelog

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



#### Current Version - v0.0.xx

View the current version of Menlo Tools for Project you have installed, hover to see a dialogue box that will tell you the release date of the version you're using.



### Setup Menlo Tools

As part of your installation, you find a project file included that contains the required Custom Field setup. Select 'Yes' to open the MPP and PDF files 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 email application.

### Training Options



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

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

### About Us



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

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

### Our Free Resources



#### Videos @ Menlo-Academy.com

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



#### Calculators @ Menlo-Academy.com

Browse our free duration calculators. This will open your 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.