

Microsoft Project

CCG Health check toolbar

User guide

Version 1

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1. Background

The Health check toolbar and associated filters were first developed by Martin Vaughan back in 1994 when MS Project for windows was used on the JORN project. Over the years they have been further refined and have formed the basis of numerous organisation's health checks. The attached MS Project template is considered "Open source", any innovations or feedback would be appreciated.

The objective of this guide is to be able to install and use the CCG Health check toolbar.

2. Opening & Enabling the Template

The Health check filters and toolbar must exist in "Global" in order for them to work. The custom field Date10 must exist in your schedule file for checks 4 and 5 to work. It may be better to start scheduling using the template file.

Alternatively to copy template contents into your schedule file and/or Global"

1. Open your existing file
2. Open the Template file (or Global).
3. From the menu, select **Tools | Organiser**.
4. On the left hand side select the Template file, on the right hand side your project file (or Global).
5. Click on filters and copy across all CHECK filters into Global
6. Click on toolbars and copy across CCG Health toolbar into Global
7. Click on fields and copy across all custom fields, especially Date10 into your schedule file

If the Health check toolbar is not visible, select **View | Toolbars** and to enable. Move the toolbar to a convenient location by clicking and dragging.



3.3 Explaining the Filters

Filter	Use	Response expected
CHECK 1 (SUMMARY WITH A DEPENDENCY)	Identifies summaries which are linked to other tasks or summaries (have either Predecessors or Successors).	Transfer Predecessors and Successors to sub tasks (as a rule, summaries should not be linked to other tasks). Filter should return no items.
CHECK 2 (MISSING PREDECESSOR)	Identifies incomplete tasks/milestones which have no predecessor assigned (no predecessor may mean incorrect Start and Finish dates).	Possibly incorrectly scheduled (sitting at project Start date). Add a Predecessor, Actual Start date or a constraint. Filter should only return Start milestone and incoming project inputs.
CHECK 3 (MISSING SUCCESSOR)	Identifies for incomplete tasks/milestones which have no successor assigned (no successor will result in large float values).	Possibly incorrect float, may actually impact schedule if correctly linked. Add a successor or consider the use of a Deadline. Filter should only return Finish milestone and outgoing project outputs.
CHECK 4 (FUTURE ACTUAL)	Identifies any tasks/milestones with an Actual date in advance of Status date (due to support of % complete status method, a future scheduled task may have some % complete and hence Actual Start date which will affect scheduling).	Check Actual dates and either modify them or set % Complete to 0. If necessary review dependencies and/or constraints. Filter should return no items.
CHECK 5 (UNSTATUSED)	Identifies any tasks/milestones sitting before the Status date which have not been updated and hence may lead to incorrect schedules.	Check the status of these items and either enter correct Actual dates or forecast them to occur after Status date. Filter should return no items.
CHECK 6 – UNRESOURCED	Identifies any tasks without allocated resources. If schedule is resourced then resourcing these items may lead to unanticipated conflict.	Allocate resources to all Tasks as necessary. Filter should only return items where resourcing is not relevant, eg equipment delivery times.
CHECK 7 – RESOURCED NON TASK	Identifies Summaries or Milestones with resources assigned. If resources are assigned to Summaries there may be double counting, if resources are assigned to Milestones they may be redundant entry.	Remove all resource assignments against Summaries. Only assign Resources to Milestones where cost allocation is required. Units will always be 0 in such cases.
CHECK 8 – EXCESSIVE DURATION	Identifies Tasks which have duration longer than 20 days.	Review and consider breaking the tasks into more detail.
CHECK 9 – SUSPECT CONSTRAINTS	Identifies Tasks or Milestones with "Must", "No Later Than" or "As Late As Possible" constraints or where Constraint date may no longer be relevant.	Review Constraints and consider removing them. Filter should return only items which are defined Targets. Caution should be demonstrated when using constraints.