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The Basics

*This chapter introduces
Microsoft Project 2010 and
explains how it can help you
manage your projects.*

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Introduction

Microsoft Project 2010 (whether you have the Project Standard or Project Professional version) is a great project management tool. Managing projects can be a complex activity but, with the help of Project, you can plan, schedule, track and communicate the progress of your project, so that you stay in control of it.

The Standard and Professional versions of Project are very similar, when used in “stand-alone” mode, and this book covers both. In addition to the functionality of the Standard version, the Professional version allows you to collaborate and share information with other Project users in your organization, through the use of Project Server and SharePoint (companion products).

Whether your project is a simple, short-term one (such as arranging a company event) or a more complex project (like launching a new product), Project 2010 can help you stay in control of it.

Project 2010 Features

Used as a planning tool, Project can produce some great looking charts and diagrams to help you plan your project. But Project can do a lot more besides:

- It can help you to understand, develop and manage project plans and schedules
- It can produce a critical path analysis to identify the areas you will need to keep a close track on progress
- It can identify if you have too much work allocated to any one person
- It can schedule facilities, such as meeting rooms and equipment for you
- It can help you to understand and control project budgets and costs
- It can keep track of public holidays and team members' vacations
- It can help you build professional looking reports to communicate and present project information in an effective and understandable way

Beware



The examples and illustrations in this book are from Project 2010. If you are using an earlier version, many features will look very different and may not be available.

Hot tip



Project 2007 in easy steps covers all the earlier versions, from Project 98 onwards.

Project Management

Successful project management is about completing a project on time, within budget, and with the needs of the business fully met. While this is easy to say, a large percentage of projects fail. The most commonly quoted figure is around half of all projects, although, depending on how you define failure, it could be as little as 25% (total failure) or as much as 75% (failed or seriously challenged).



Whichever way you look at it, only around one quarter of projects end up as fully successful (i.e. completed on time, within budget, and with the required scope). In order to get most projects completed, corners have to be cut, but things still seem to take longer than expected. As a further result, costs inevitably seem to increase.

Successful Projects

It doesn't have to be that way. We know how to ensure projects are successful, it's not rocket science, it's just plain common sense. Throughout this book, you will find some basic project management concepts that have been proved in practice. Follow these concepts and advice to ensure that your project will be successful.

Microsoft Project

Microsoft Project is a great product that will help you plan, organize and control your project. It won't carry it out for you (you still have to do that yourself), but what it will do is help you to control and complete it successfully.

Hot tip



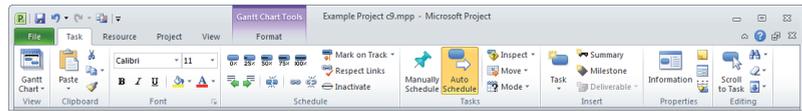
Project Management in easy steps is a companion book and covers project management in much more detail.

What's New?

There are a number of significant changes and enhancements in Project 2010, which are noted, where relevant, throughout the book. The key new features and functionality are:

User Interface

Microsoft has introduced the Fluent User Interface (or ribbon) to replace the traditional toolbars and buttons found on earlier versions of Project, up to Project 2007.



Enhanced Tables

The Tables in Project 2010 now act more like Excel tables, with the following significant enhancements:

- Columns can be added dynamically, by entering data without the need to select data type
- Simplified data entry with auto-complete and enhanced color and text formatting options
- Automatic text wrap adjusts the row height to display the full task name
- Filter available on each column, to quickly find data and analyze results
- Improved copy and paste functionality, to share data and formatting between Project and other applications

Task Name	Duration	Start	Finish	Importance	Predecessors	Resource Names	Add New Column
1 Initiation Stage	13 days	Fri 07/01/11	Wed 07/20/11				
2 1.1 Agree Project Objectives	1 day	Fri 07/01/11	Fri 07/01/11	High		Prudence Project	
3 1.2 Identify Stakeholders	1 day	Thu 07/07/11	Thu 07/07/11	High	2FS+2 days	Prudence Project	
4 1.3 Select Project Team	2 days	Fri 07/08/11	Mon 07/11/11	High	3	Bill Buggs, Prudence	
5 1.4 Identify Business Case	2 days	Mon 07/11/11	Tue 07/12/11	Medium	4FS-1 day	Bill Buggs	
6 1.5 Risk Analysis	1 day	Mon 07/11/11	Mon 07/11/11	Medium	SSS	Prudence Project	
7 1.6 Produce Outline Plan	1 day	Wed 07/13/11	Wed 07/13/11	Medium	5,6	Prudence Project	
8 1.7 Project Approval	5 days	Thu 07/14/11	Wed 07/20/11	High	7		
9 2 Strategy Stage	24.5 days	Thu 07/21/11	Wed 08/24/11				
10 2.1 Interviews	4 days	Thu 07/21/11	Tue 07/26/11				
11 2.1.1 Interview Managers	2 days	Thu 07/21/11	Tue 07/26/11	Medium	8	Prudence Project, T	
12 2.1.2 Interview Staff	2 days	Thu 07/21/11	Fri 07/22/11			Prudence Project	
13 2.2 Draft Requirements	2 days	Wed 07/27/11	Thu 07/28/11		12,11		

Beware



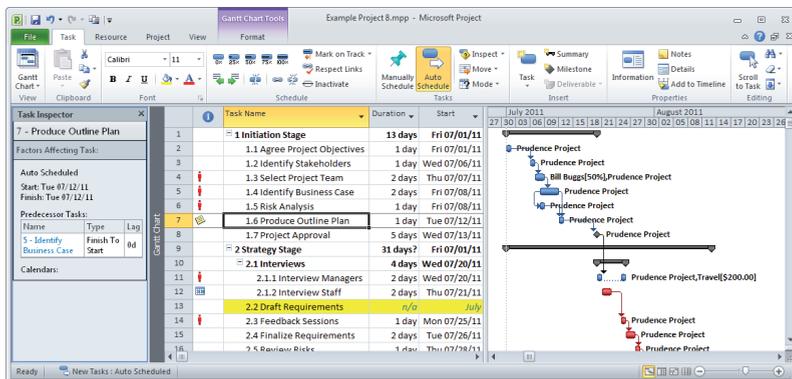
Please note that the dates illustrated in this book are in MM/DD/YY format.

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User-Controlled Scheduling

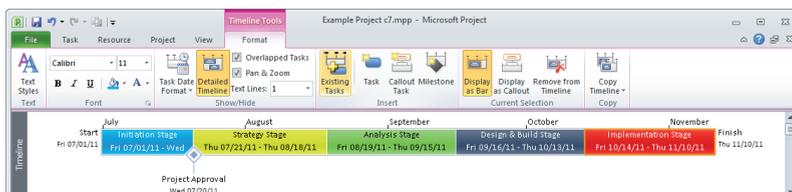
In previous versions of Project, tasks would automatically be scheduled to begin either on the current date (if the task had no predecessor) or directly after any preceding tasks are completed. In Project 2010, the user has far more control over scheduling:

- You can manually schedule tasks with any (or no) information you currently have, or allow Project to schedule tasks automatically with calculated start and end dates
- Project will alert you of any scheduling concerns with squiggly underlines
- Task Inspector will provide more details and assist you in solving problems
- You can also create high-level schedules using top-down summary tasks



Timeline View

This new function allows you to share a simple visual timeline with all project stakeholders. The timeline can be tailored and customized to effectively display the key information and dates relevant to each group.

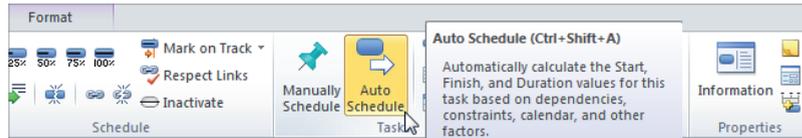


Version Comparison

Project Standard

In addition to the new features listed in the preceding topic, Project Standard 2010 contains a number of enhancements from the previous version (Project Standard 2007):

- Hovering over a command brings up detailed Tool Tips, as illustrated below



- The new navigation ribbon (replacing the menu bar) can be customized
- Tools, templates and program options are all now accessible in the File view
- Placeholder text can be entered in date and other data fields to allow for later completion, as illustrated below

	Task Name	Duration	Start	Sep 19, '11	Sep 26, '11
27	4 Design & Build Stage	20.5 days?	Wed 09/21/11	19	20
28	4.1 Design Work	5 days	Wed 09/21/11	21	22
29	4.2 Initial Build Work	n/a	October	23	24
30	4.3 Dummy Task	20 days	Wed 09/21/11	25	26
31	5 Implementation Stage	20 days	Wed 10/19/11	27	28

- Tasks can be defined as active or inactive and the impact of this on the schedule can be reviewed
- The new Task Inspector function provides information on dealing with overallocated resources or scheduling problems
- Enhancements to the copy and paste functionality means that outline levels and formatting information can now be retained
- User-controlled scheduling allows for greater flexibility than automatic scheduling on its own
- Resource levelling and resource substitution functionality has been enhanced to provide support for additional techniques
- PDF and XPS file save formats are now supported

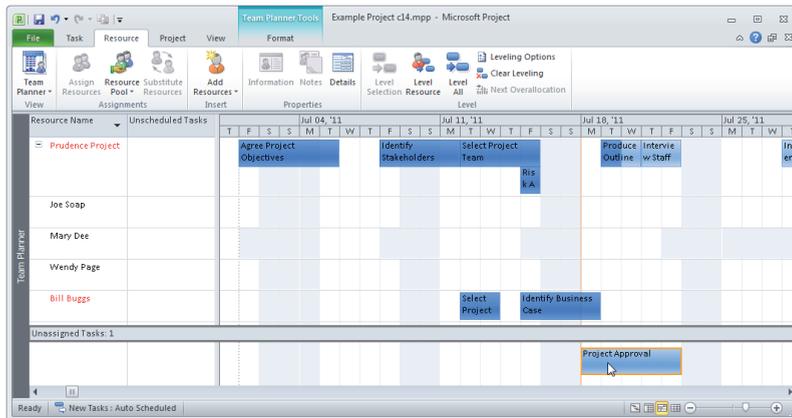
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Project Professional

In addition to the new and enhanced features in Project Standard, the Professional version of Project 2010 contains the following additional functionality:

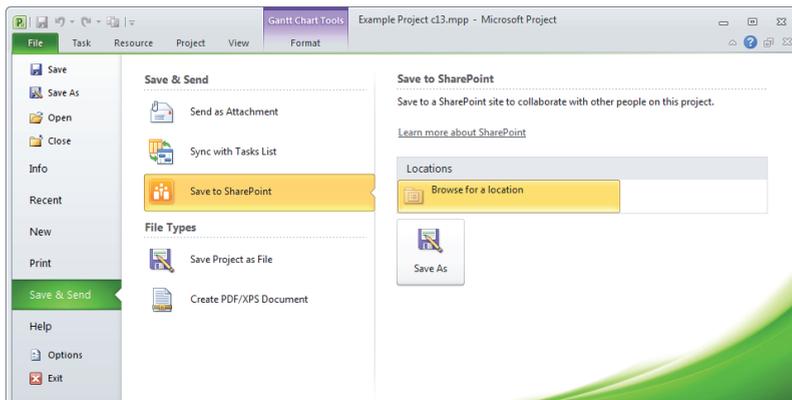
Team Planner

Providing visual dragging and dropping of assignment changes, to deal with work overload, as illustrated below



Enhanced Collaboration

Integration allows project schedules to be published and shared, with SharePoint. Synchronization of schedules between Project Professional and SharePoint task lists can be performed, so that changes can be made by team members and reflected back into the Project schedule.

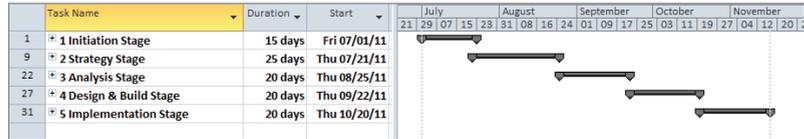


The Gantt Chart

The first thing you see when you open or create a new project is the Gantt chart. It is the default view, and with good reason. The Gantt chart is probably the most widely used and most useful project management tool.

Summary Level

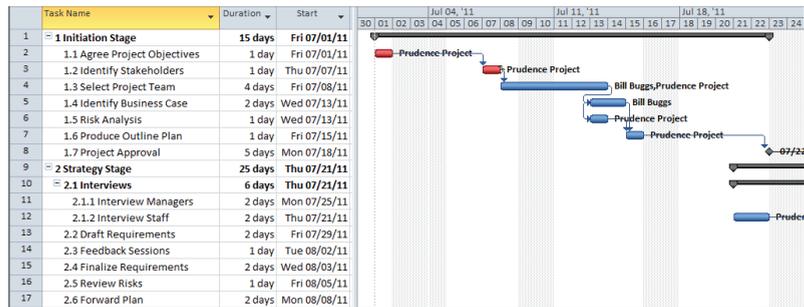
They say that every picture tells a thousand words, and this is the key picture in your project:



At the summary-level (as illustrated above), you can view the whole project on one screen or sheet of paper. The Gantt chart represents the most frequently used way of representing a project graphically and is particularly useful for senior management in its rolled-up summary form (as above).

Detailed Level

At the more detailed level (as illustrated below), the Gantt chart is typically used by the project manager to communicate with the project team, and to track project progress, by task, on a day-to-day basis.

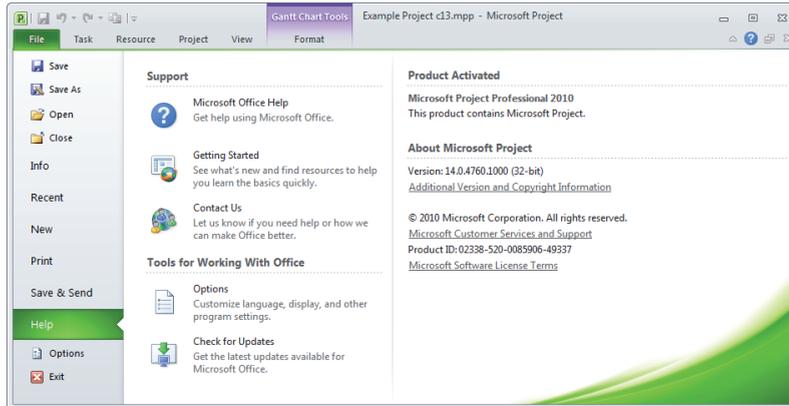


In addition to letting you view the project schedule at the strategic (high-level) and operational (detailed-level), the Gantt chart view also allows you to insert and edit tasks, and allocate the people and other resources to work on the tasks. You can set milestones and deadlines, and generally keep track of your project and the resources working on it.

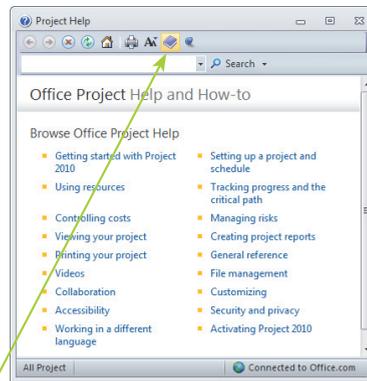
Getting Help

Getting extensive help in Project is fairly straight forward, and is only a couple of clicks or the press of the F1 function key away:

- 1 Select Help from the File ribbon for the full range of options, as illustrated below



- 2 Click on Office Help (or use the F1 function key) to open the Project Help dialog box



- 3 Select the required category and sub-category and the required help text will be displayed, or type a query and click Search

- 4 Click on Show Table of Contents to bring up the full, expandable table of contents in a side pane, as illustrated right



- 5 Click it again to hide the table of contents

Summary

- Microsoft Project can help you to plan and schedule your project, allocate tasks, and track progress and costs
- One thing Project can't do for you is manage the actual work of your project. Around 50% of projects fail for reasons that are known and understood. This book includes some proven project management concepts to help you make sure your project is a success
- Project 2010 introduces the Fluent User Interface (or ribbon), bringing Project into line with the rest of the Microsoft Office suite
- Enhanced Tables now act more like Excel tables with: dynamic column addition, simplified data entry, automatic text wrapping, column filter, and improved copy and paste functionality
- User Controlled Scheduling allows you to choose whether to manually schedule tasks or to let Project schedule them for you automatically
- Project can now alert you to any scheduling concerns and, with an improved Task Inspector function, these can easily be rectified
- The new Timeline View allows you to communicate a high level view of the project through other Office applications
- Project Standard has a number of further enhancements and improvements, while Project Professional also adds Team Planner (with visual drag and drop of tasks and resources) and Enhanced Collaboration (allowing you to publish, share and synchronize information between Project and SharePoint)
- The Gantt chart is the most useful view in Project, and the one in which you will probably choose to do most of your work. At the summary level it is great for communicating strategically, while at the detailed level it is great for working with the team on a day to day basis
- Getting help is only a click away, or you can use the F1 to go direct to the Project Help dialog box and full help contents