



## Chapter 1

### **Why Are You Here?**





## Chapter 2

# **Overview of Project Management**





## Chapter 3

# **Overview of Microsoft Project**

## The Flow of Project Management Software

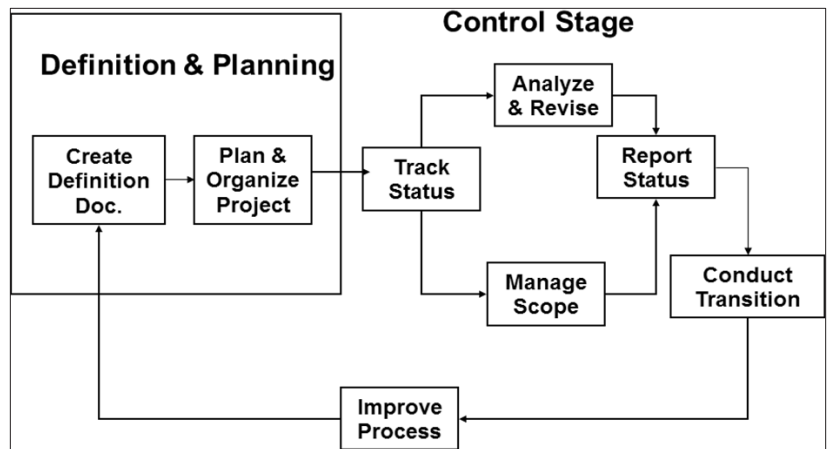
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Project 2010 was designed to help the Project Manager schedule the work of a project and monitor the progress of the project. Some of the high level capabilities of Project 2010 are:

1. The ability to plan and manage a project using Work Breakdown Structure (outline) format
2. Work, duration and cost planning, forecasting and tracking
3. Flexible reporting capabilities and customization
4. Ability to interface with Project Server and Project Portfolio Servers to allow for integration of projects and resource management within an organization (Professional version only)
5. Project 2010 allows for both manual and automatic project scheduling
6. Resource management – planning and forecasting
7. Budget forecasting and tracking
8. Baseline and variance reporting
9. Schedule predictability and what-if scenarios
10. Dynamic schedule management

Project management software has a flow which reflects the project management process:

1. Projects are defined and the decision is made to perform the project
2. More indept planning is conducted to elaborate the tasks, resources and work required to complete the project
3. Projects will start to be performed
4. Tracking information of how the working is getting accomplished is feed back to the project manager and updated into the schedule
5. Stakeholders request changes to the product of the project
6. Reports are produced to reflect project status and schedule
7. Steps 4-6 are repeated until the project is completed
8. When the project is completed a transition will be made to incorporate the product of the project into the businss process.
9. Reflection is made as to how the project was performed looking for process improvement.



**Figure 3-1** PLACEHOLDER

Project 2010 was developed in two versions of project management software:

1. Project 2010 Standard is a desktop application and is considered a stand alone schedule management tool. There are capabilities for managing individual projects as well as management of multiple projects with a shared resource pool.
2. Project 2010 Professional has all of the features of Project 2010 Standard and has the ability to allow publishing of projects to a server environment. This allows for collaboration, communication and resource sharing across projects. A web application is available for on-line project planning, resource updates, and inquiries.

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## Project Usage

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When working with information in Project, you can view data at a high-level or drill down to a detail level. Project offers timescaled views ranging from yearly all the way down to each minute. Schedulers, project managers, and other professionals using this tool will need to determine what level of information is needed to produce the desired output of information. You also need to determine how granular you want to be in maintaining that information.

For example, some organizations manage resource assignments by looking at the week as a whole and ensuring resources have 40 hours of work assigned to them. These organizations do not care if one day shows 6 hours and another day shows 12, they simply look at the total weekly hours. Other organizations drill into the daily view and ensure resources have 8 hours a day.

As you might realize, working with information drilled into the daily view will require you to manage tasks on a daily basis, while working with information on a weekly view only requires you to manage tasks on a weekly basis. This also drives the accuracy of your reports. Management of work on a daily basis gives you accurate reports for each day while management of work on a weekly basis only gives you accurate reports on a weekly basis.

When deciding your usage of project, keep in mind the following:

More Detail = More Work = More Results

Less Detail = Less Work = Less Results



Create a strategy for managing to a specific level of detail and stick with it to be most efficient in Project. For example – do not manage one task on a daily basis and another task on a weekly basis.



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# What Microsoft Project Will Do for You

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## Formulate a Strategy

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Before a project schedule is created, define what information you are hoping your schedule will return for the work and time you devote to the using the schedule. .

Set your goals for the project schedule:

1. Define the type of information your project schedule should return?
  - a. When performing home remodeling you might be interested in when to schedule the contractors.
  - b. When developing a software module you might be interested in estimating work hours of resources and costing.
  - c. When performing annual maintenance of machinery you might be interested in the timeline and the number of resources needed to accomplish the project.
2. Different projects, by nature, require different levels of detail and tracking. Decide what is right for the project you need to accomplish. The more detail the more complex the schedule will become.
3. What type of metrics (field values ie: work, cost, duration, earned value, etc) will your project management and post-project reporting require?
4. How will you track your project?
5. What are your Stakeholders status reporting expectations? Define at the column level.
6. How much work are you as a project manager willing to do to achieve desired results?

If Project Managers preplan the requirements and the outputs of the project schedule, the schedule will be more productive and result in more valid data.

Project Managers have a tendency to make the project schedule

become the project. Preplanning will help project managers avoid this pitfall.

## Success Checklist

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Checklist to help plan a schedule more effectively:

1. **Goals:** Set the output goals of the schedule. Ask yourself: Management of the schedule is useful when I get what type of information from the schedule?
2. **Schedule:** Is the schedule a checklist of activities or is it tasks that will be managed? If it is a checklist, should it be an Excel list? If one task is late, should it change the dates for future related tasks?
3. **Reporting:** Request details of the content of status reporting required for the project from management. This will help in knowing which pieces of information you will need to focus on during schedule creation and management. It will also help set expectations for stakeholders.
4. **Data:** Gather requirements for data reports: by week? by department? by variance to baseline? etc. Some of this information will be standard in Project 2010 and some will be created using customization features.
5. **Tracking:** Are tasks required to be tracked by the number of hours worked per task or is tracking by percent complete sufficient? Defining the tracking of the project will be tied to the type of metrics that the project schedule will produce.
6. **Earned Value (EV):** if measuring EV is a requirement, more task details, estimating, baseline and tracking details will be required. This will likely result in more work for the project manager. Is help available for managing the project schedule?
7. **Resources:** What kind of reporting requirements will resources be responsible for during the project and how will the data be used. Will resource availability be updated collected and updated to the project schedule?

Defining output requirements of the schedule will in turn define the benefits of creating and maintaining the schedule. Establishing these goals will help the project manager focus on the benefits of the schedule for each specific project.

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## **Microsoft Project Usage: More Detail, More Work, More Results, Less Detail, Less Work, Less Results**

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## Project Desktop 2013 Overview of Versions

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Microsoft offers three different versions of Project

**Project Standard** – This is the base scheduling software product which provides functionality that supports a majority of individuals needing a robust schedule tool. Project Standard also provides the following:

- Integration with the Office Store so you can purchase Apps for Project 2013
- Integration with SkyDrive for cloud storage of your project plan

**Project Professional** – The version offers the same features as Project Standard but provides these additional functions:

- Ability to inactivate tasks for various business scenarios and to support agile project management
- Lync integration (2010 or later) to support team collaboration within Project
- Visual resource management using Team Planner view
- Ability to integrate with SharePoint 2013/SharePoint Online for storing of project plans and task syncing
- Ability to connect to Project Server 2013/Project Online to support an enterprise project and portfolio management system

**Project Pro for Office 365** – The version offers the same features as Project Professional but provides these additional functions:

- Delivers the software as a subscription service so it is always up to date with updates to the software being applied on a regular basis through Office 365
- Provides the ability to stream software to up to 5 devices (e.g. home PC, work PC, and tablet) using a connected Office 365 account



Internet access will be required to have access to all of the functions listed above.

For current pricing and a comparison chart of features, visit [www.microsoft.com/project](http://www.microsoft.com/project).

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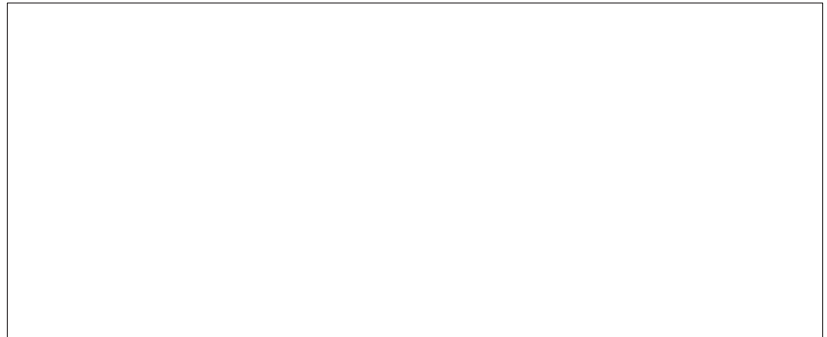
## Overview of Project as a Database

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Although Project may in some ways look like Excel, it is actually a very complex database. Below are some reasons to use a database:

- Eliminates the need to have information duplicated in multiple locations
- Creates a structure of information that can be organized by subject
- Creates the ability to have information related to each other
- Simplifies the ability to report on related information crossing multiple subjects

If Project was set up like a single file is in Excel, each time you assigned a resource to a task, you would have to duplicate all the details about the resource on every single task. This would create a lot of unnecessary information. In addition, every time a resource detail was changed, this would have to be duplicated on every single task. Duplicate information is a good reason to use a database structure.



**Figure 3-2** (optional screen shot here)

By using a database structure within Project, the resource is instead connected to a task but all the details about the resource are stored in another location. This way when a report is needed, details can be pulled from multiple locations. This book is not designed to teach everything that you need to know about databases but please refer to the following chart for an example of how all of this information works together.

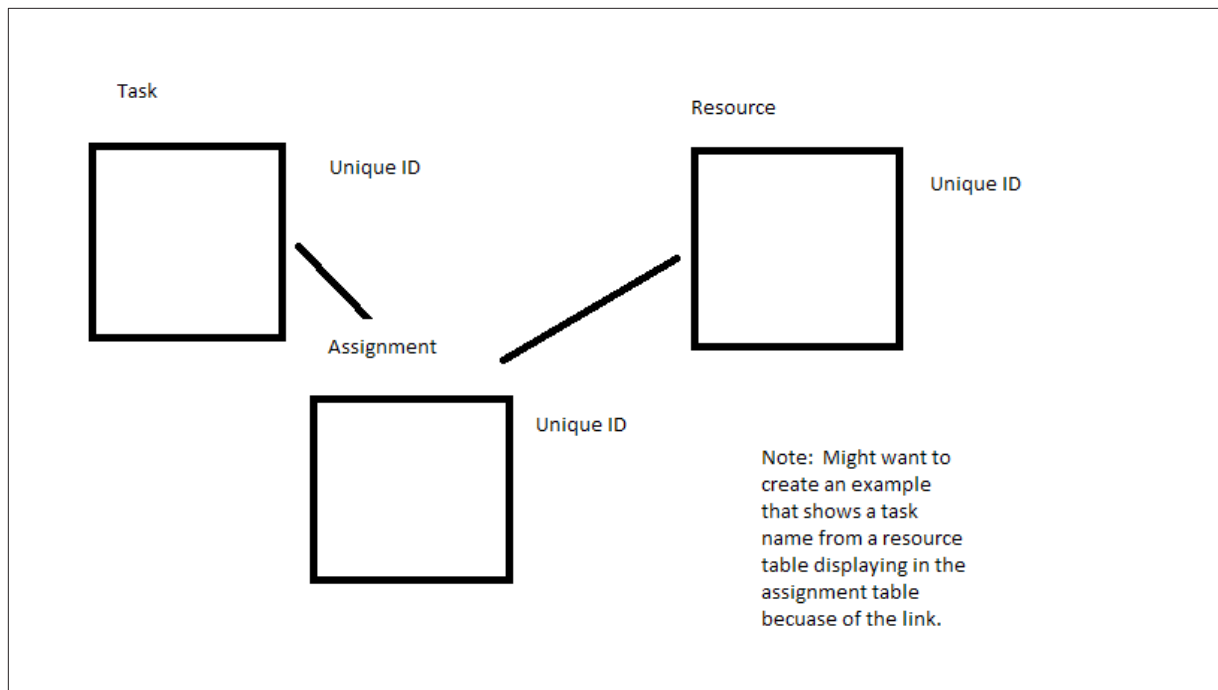


Figure 3-3 (insert chart here)

Notice that Project has three main tables of information – Task, Resource and Assignment. When a resource is assigned to a task, Project draws a connection/link between a unique resource field with a unique task field. Normally the unique field is not displayed in views, but can be added if desired.

Additional information about this database approach in Project:

- All the fields or columns of information are pre-defined when you create a project plan. Creating a plan is simply editing the information in fields/columns.
- Hiding a column in Project does not delete the information, it simply removes it from the current view
- Inserting a column is simply adding the information to a particular view
- Changing a field of information in one view is changing the information in the database and any other view that uses that field will display the change
- Some views are designed for a specific purpose and may display task information only, resource information only or some combination of task, resource, and assignment information. For example, the Resource Sheet view does not allow you to display task names in it. That is because it is

a specific view to show resource details. If you want to see how those resources are assigned, you should consider another view such as Task Usage, Resource Usage, or Gantt Chart.

This brief discussion should start you on your way to learning more about Project and how its database structure work well when managing schedules.

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## Review of the Ribbon, Back Stage, Quick Launch

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### Exploring the Ribbon

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The Ribbon is the new Fluent User Interface which you will find across Microsoft Office products. While it might look daunting at first, you will be pleased to know that features formerly hidden in a series of menus and submenus are now easy to find and there are new features available right at your fingertips. The series of tabs located at the top of the Ribbon represent the different sectors of work, such as resource management or task management. Starting with the Task tab, you will see it is divided into logical sections called groups. The group names are listed just below a collection of buttons. Buttons that are larger indicate a feature that is frequently used. Some of the important advantages to the Ribbon include:

- Everything is organized on tabs by subject area.
- Information on the Format tab automatically responds to the current working environment and provides “view” relevant buttons. Notice the view-specific heading above the Format tab.
- The size of the buttons adjust based on your available window or screen size so you don’t lose any capabilities, while maintaining maximum work area screen real estate.
- Features are available in a quick one- or two-click fashion.
- You can tailor the Ribbon by adding and/or removing features or by adding a new tab.



The File tab is unique and will be addressed in the next section.



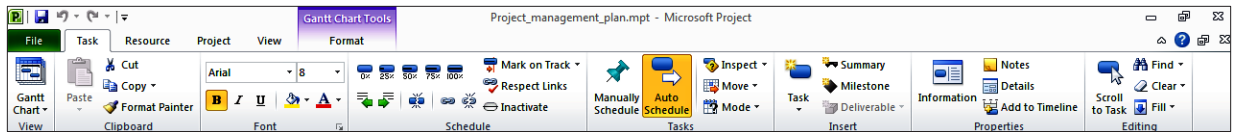


Figure 3-4 Microsoft Project 2010 Ribbon



The Ribbon can be configured to auto-hide or auto-display giving you valuable screen space as you work on your schedule. To set this, click the “minimize the Ribbon” symbol in the upper right-hand corner of the screen.

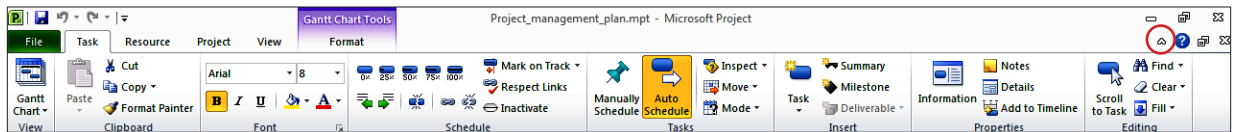


Figure 3-5 Project Ribbon – Expanded

To disable this feature, click the “Expand the Ribbon” symbol in the upper right-hand corner of the screen.



Figure 3-6 Project Ribbon – Minimized

## Backstage View (File Tab)

To centrally locate file management activities, they are located on the File tab. Think of what you “do to the entire file” when you enter this area. This area is now known as the Backstage View. Some of the features available include:

- New, open, close, save, and print.
- Connect with SharePoint and create PDF/XPS files.
- Project Options – aligning options to all new projects or only specific projects.

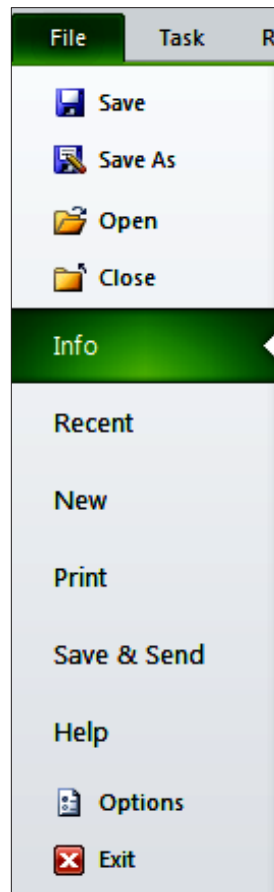


Figure 3-7 Backstage View (File Tab)



To exit Backstage View either click the **File** tab again or click the **Task** tab. Clicking **Exit** will close Project.

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## Sample Views and Navigation Stuff

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### Task Views

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Task views are accessed through the **Task** ribbon and **Gantt Chart** button located under the Gantt Chart icon. An alternate access point is through the View ribbon. All Gantt Charts contain both the graphic side of the view as well as a table for additional data viewing. All views are available through:

Task ribbon → button under Gantt Chart icon → more views



**Figure 3-8** PLACEHOLDER

The following is a summary of the most frequently used Task views:

**Gantt Chart** – the Gantt Chart is a graphic representation of the start and finish dates for a task. In addition to graphic bars, relationship arrows are also displayed. Gantt Charts will have a data table on the left side of the view called the Task Sheet. The default table of data is included called the Entry table which contains fields designed to aid in the planning and scheduling of tasks. The timescale in the view may be adjusted to show different time density timelines. Below is an example of the Gantt Chart view.

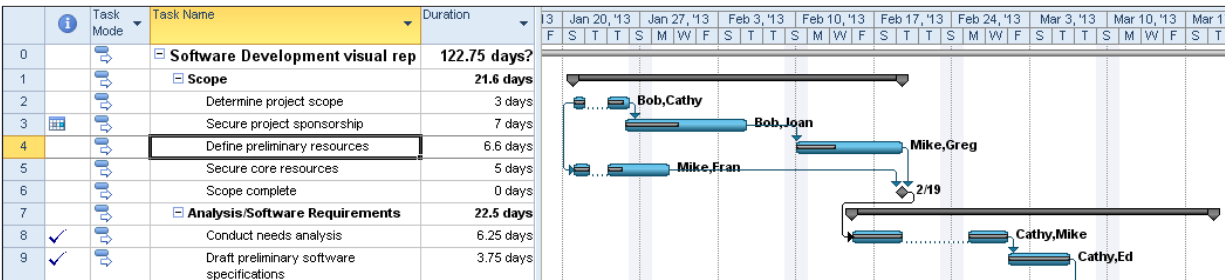


Figure 3-9 PLACEHOLDER

**Tracking Gantt** – this view will graphically represent of the start and finish dates of a task like the Gantt Chart above but is designed to help during the tracking phase of the project schedule. Percent complete and comparison of baseline versus actual values and future plan are displayed. In the example below, the beige Gantt bars are the baseline and the blue bars is the running schedule.

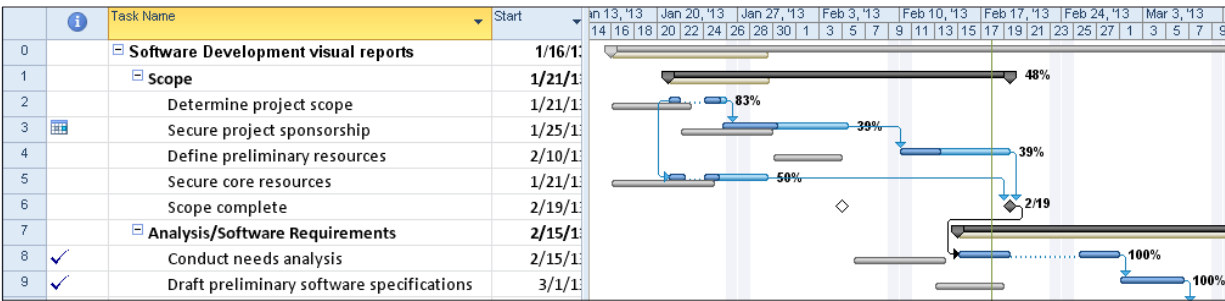


Figure 3-10 PLACEHOLDER

**Network Diagram** – The Network diagram is designed as a precedence diagram. It shows the predecessors and successors of tasks with-out regard to timeframe. When in the Network Diagram view, clicking on **Format** → **Box** styles will explain details about the information represented in the Network Diagram. Double clicking on a task will allows access to task information.

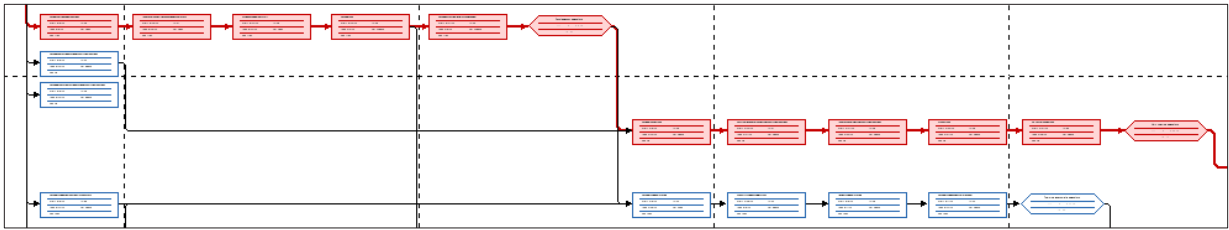


Figure 3-11 PLACEHOLDER

**Calendar view** – The calendar view shows the project schedule on a calendar. Date range is available as well as limited customization. Double click on any task name to see more information regarding the tasks. Some customization of the view is available.

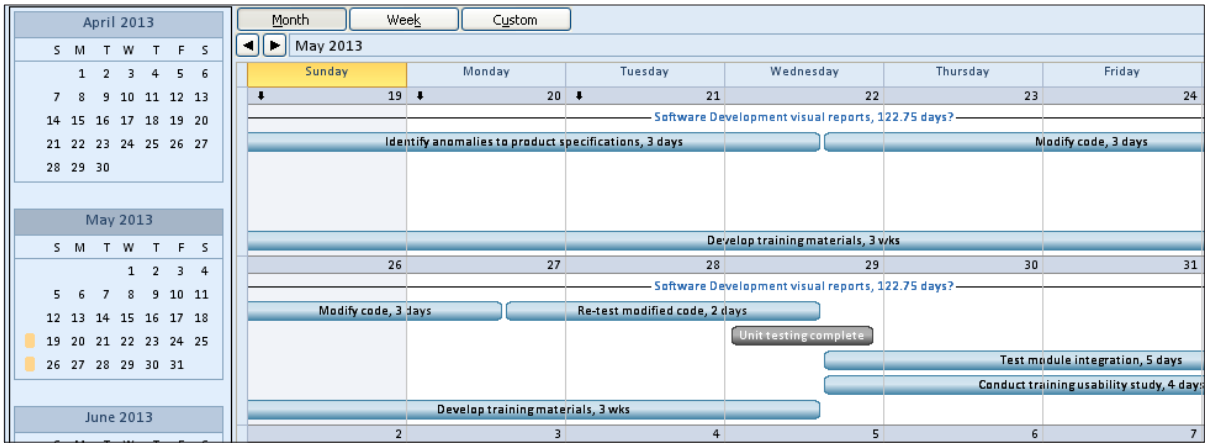


Figure 3-12 PLACEHOLDER

**Task Form** – The task form shows information about individual tasks. Right clicking in the view will allow changing to 8 different views for task data such as predecessor and successor, resource work, and resource schedule. The Task Form is a light version of the Detail Task Form which contains more per task data.

Name:	Review software environment	Duration:	5 days	<input checked="" type="checkbox"/> Effort driven	<input type="checkbox"/> Manually Scheduled	Previous	Next
Start:	1/7/13	Finish:	1/11/13	Task type:	Fixed Units	% Complete:	0%
ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
1	Architecture analyst	100%	40h	0h	0h	0h	40h

Figure 3-13 PLACEHOLDER

**Task Sheet** – The task sheet view looks like an Excel table. It is a table of data which is a subset of the approximately 300 fields of the task section of the database. Tables are typically 6-10 columns of data, organized by topic. Some of the most used tables are: Entry, Work, Duration, and Tracking. To switch to another table view, right click in the box above the task numbers and select another table from the list. Another access point is:

View → Tables

		Task Name	Duration	Start	Finish	Predecessors	Resource Names	Add New Column
0		Infrastructure Deployment	141.25 days	1/1/13	7/17/13			
1		Infrastructure Deployment Template	141.25 days	1/1/13	7/17/13			
2		Scope	4 days	1/1/13	1/4/13			
3		Determine project scope	1 day	1/1/13	1/1/13		Project management	
4		Secure project sponsors	1 day	1/2/13	1/2/13	3	Project management	
5		Define preliminary resou	1 day	1/3/13	1/3/13	4	Project management	
6		Secure core resources	1 day	1/4/13	1/4/13	5	Project management	
7		Scope complete	0 days	1/4/13	1/4/13	6		
8		Analysis	30 days	1/7/13	2/15/13			
9		Review Current Infrastructure	5 days	1/7/13	1/11/13			
10		Review hardware environment	5 days	1/7/13	1/11/13	7	Architecture analyst	

Figure 3-14 PLACEHOLDER

**Timeline View** – The Timeline View is a very flexible and customizable view. Tasks may be selected to appear on the timeline to give high level reporting capability. In addition, the timeline has the ability to highlight the timeframe it is representing. The Timeline View may be turned when needed on the from the **View** → click box to the left of the timeline option. Formatting is available to colorize the view. Comments and milestone markers may also be added. The Timeline view will be discussed in **Module**

10.

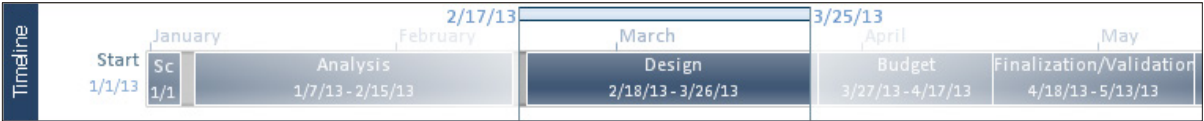


Figure 3-15 PLACEHOLDER

**Task Usage** – The Task Usage view shows tasks and the resources assigned to the task. Data in this view comes from the Task and Assignment data sections of the database. By default, the work field of data is shown on the right but additional fields may be added to customize the report and make it more usable. The example below is showing when a task is scheduled and the cost of the resource working on the task by week.

	Task Mode	Task Name	vWork	Details	February 1		March 1		April 1	
					2/3	2/17	3/3	3/17	3/31	
7		Analysis/Software Requirements	236 hrs	Work	16h	100h	108h	12h		
				Cost	\$1,600.00	\$10,000.00	\$10,800.00	\$1,200.00		
8		Conduct needs analysis	100 hrs	Work	16h	84h				
				Cost	\$1,600.00	\$8,400.00				
		Mike	50 hrs	Work	8h	42h				
				Cost	\$800.00	\$4,200.00				
		Cathy	50 hrs	Work	8h	42h				
				Cost	\$800.00	\$4,200.00				

Figure 3-16 PLACEHOLDER

## Resource Views

Resource views are accessed through the Task ribbon and Gantt chart button under the Gantt Chart icon. They can also be accessed from the Resource ribbon by clicking on the words Team Planner button which is the first button on the on the left side of the ribbon. All views are available through:

Task ribbon → button under Gantt Chart icon → More Views

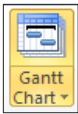


Figure 3-17 PLACEHOLDER

**Resource Sheet** – The resource sheet provides the table where resources are added into Project 2010. This table is a subset of the over 300 resource data fields available for resources. The default table is called the Entry table. Other tables are available by right clicking in the in the box above the resource number one and selecting another table. Tables are organized by topic.

		Resource Name ▾	Type ▾	Material ▾	Initials ▾	Group ▾	Max. ▾	Std. Rate ▾	Ovt. Rate ▾	Cost/Use ▾	Accrue ▾	Base ▾
1		Architecture analyst	Work		A		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
2		Project management	Work		P		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
3		Deployment res	Work		D		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
4		Procurement	Work		P		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
5		Management	Work		M		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard

Figure 3-18 PLACEHOLDER

**Resource Form** - The Resource Form shows information and assignments for individual resources. Right clicking in the view will allow changing to 5 different views which shows the resource assignment data in different ways. The Resource Form is very useful for viewing resource cost, work and schedule information by resource.

Name:  Initials:  Max units:

Costs

Std rate:  Per use:  Ovt rate:  Accrue at:

Base cal:  Group:  Code:

Project	ID	Task Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
Software Deve	2	Determine project scope	100%	20h	0h	16h	20h	0h
Software Deve	3	Secure project sponsorship	100%	41h	0h	32h	22h	19h
Software Deve	14	Obtain approvals to proceed (concept	100%	8h	0h	4h	8h	0h
Software Deve	21	Review functional specifications	100%	16h	0h	16h	0h	16h
Software Deve	22	Incorporate feedback into functional s	100%	8h	0h	8h	0h	8h
Software Deve	23	Obtain approval to proceed	100%	4h	0h	4h	0h	4h

Figure 3-19 PLACEHOLDER

**Resource Graph** – The Resource Graph will show work and cost val-



ues in graphic format for individual resources. The timeline of the graphic display may be altered to show reports at the time density which is most meaningful for the report. Customization is available to change the graphic layout and data included.

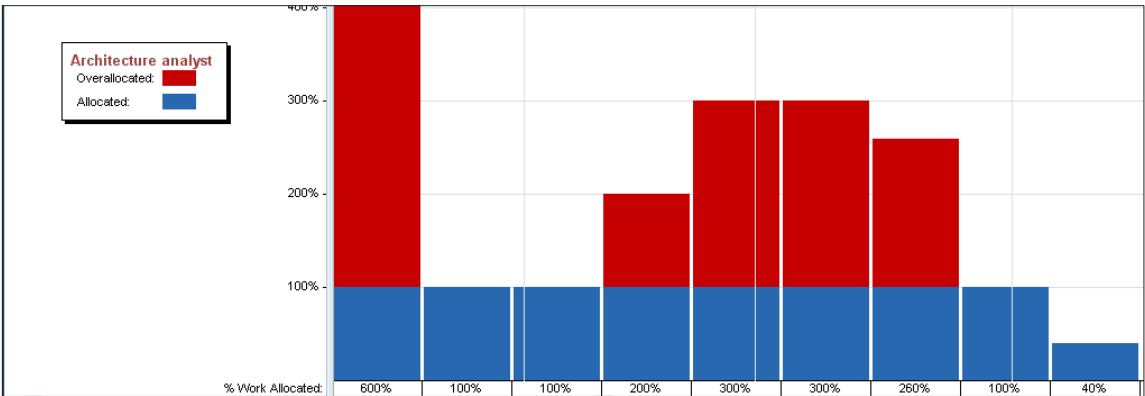


Figure 3-20 PLACEHOLDER

**Team Planner** – the Team Planner view is also known as a swim lane view. It will show the work of the resources in timeline format. It will also allow for moving task assignments between resources and to alternate timeframes. This will be a very helpful view for resource leveling and smoothing out work loads. It will also show tasks without assignments. This view is available for Project 2010 Professional only.

Project management			Train deployment resources in depl	Sele ct in	Review deployment team tasks and timeline	Deploy infrastructure co	Test infrastructure co	R Obtain e feedback	Eval uate	Dete rmin
Deployment resources			Train deployment resources in depl	Sele ct in	Review deployment team tasks and timeline	Deploy infrastructure co	Test infrastructure co	R Obtain e feedback	Eval uate	

Figure 3-21 PLACEHOLDER

**Resource Usage**– The Resource Form is a view that shows resources and the tasks assigned to resources. Data in this view comes from the Resource and Assignment data sections of the database. By default the work column is shown on the right side of the screen. In the view below the remaining resource availability has been added.

3		Deployment resources	Work	40h	40h	36h	40h	40h	32h	40h	40h	40h	40h	40h	18h
			Rem. Avail.	0h	0h	4h	0h	0h	8h	0h	0h	0h	0h	0h	22h
		Develop detailed implementation strategy	Work	40h											
			Rem. Avail.												
		Validate implementation strategy in test environment	Work		24h										
			Rem. Avail.												
		Review implementation strategy noting other initiatives	Work		16h										
			Rem. Avail.												

Figure 3-22 PLACEHOLDER

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## Zoom Ribbon Section, Insert/Hide Column/Timescale/Scroll to Task

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### Zooming In and Out

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Zooming in or out is the way to adjust the bar chart or time scale portion of a view to show more or less detail. For example, you can display Gantt bars across a daily time scale or across a quarterly time scale.

Two popular methods for zooming in and out are using the Zoom Slider and the Zoom options on the View tab. The Zoom Slider is recommended since that option is always displayed even when you navigate to another view.

- You can click the minus and plus buttons to zoom out and zoom in.
- You can drag the zoom indicator in between the zoom out and zoom in buttons.



**Figure 3-23** Zoom Slider

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### Remove or Add a Column

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When you hide a column in Project 2010, the column is only removed from view, not deleted from your plan. Keep in mind that hiding a column doesn't remove any information from your plan.

## Hide or Remove a Column

To hide a column from a sheet view:

1. In a sheet view, select the column you want to hide by clicking its title.
2. This displays the **Gantt Chart Tools** tab with the **Format** tab underneath in the Ribbon.
3. In the **Format** tab, **Columns** group, click **Column Settings**.
4. Click **Hide Column**. You can also press the **delete** key on your keyboard.

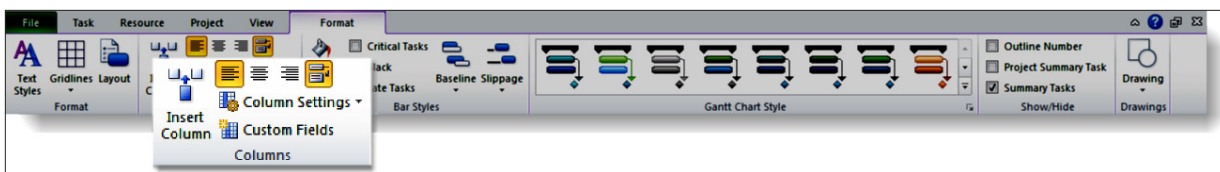


Figure 3-24 Hide or Remove Column Icons

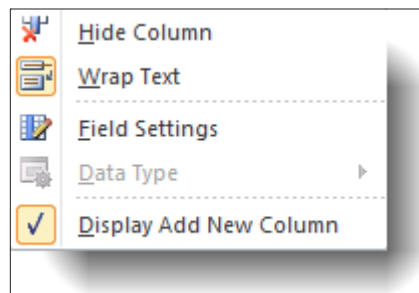


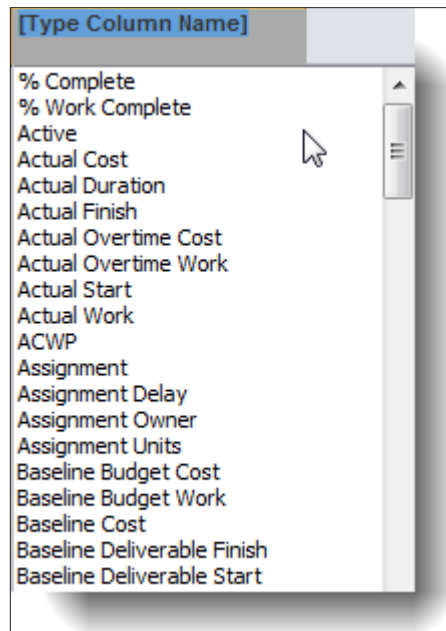
Figure 3-25 Column Settings Dropdown Menu

## Add a Column

To add a new column:

1. In a sheet view, select the column to the right of where you want to insert the column.
2. This displays the **Gantt Chart Tools** tab with the **Format** tab underneath in the Ribbon.
3. In the **Format** tab, **Columns** group, click **Insert Column**.

4. A new blank column is displayed to the left of the column that you had selected. Click the dropdown arrow in the title box to specify the type of information from the list of possible column types (or fields) that the column will contain.



**Figure 3-26** Add New Column

Also at the end of every table in a Sheet view (the far right) there is an **Add New Column** option available.

	Work ▾	Predecessors ▾	Resource Names ▾	Add New Column ▾
4	8 hrs		Project Director	
5	8 hrs 4		Project Director	
6	8 hrs 5		Project Manager	
7	8 hrs 6		Project Manager, Acceptor	
8	0 hrs 7			
9	40 hrs			
10	8 hrs 8		Project Director	
11	8 hrs 10		Application Architect, Technical	

**Figure 3-27** Add New Column in View



To unhide a previously hidden column, insert the column as you would with any new column.

## Using the Scroll to Task Button

Using the Scroll to Task button re-centers the bar chart on the date where a selected task occurs.

To use this feature, complete the following steps:

1. In the **Entry** table, select the task you want to have displayed in the bar chart.
2. On the **Task** tab, **Editing** group, click the **Scroll to Task** button.

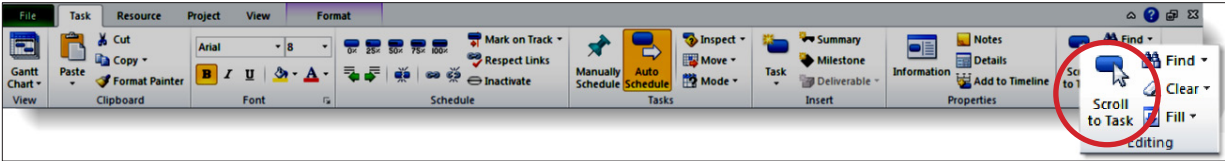


Figure 3-28 Scroll to Task Icon

Project displays the date or dates where the selected task occurs on the bar chart.

Conversely, you can view the name of a task in the Entry table by clicking on its bar in the bar chart. Project will highlight the corresponding task in the Entry table.

## Go To and Find

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## Help

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# Keyboard Shortcuts

Key Tips allow you to use your keyboard to navigate through the Quick Access Toolbar and the Ribbon. To turn on Key Tips, simply tap the Alt key. You can also press F10 twice. Follow the letters and numbers that are displayed to use the function you desire.

You can also use keyboard shortcuts to navigate through your project. The following table lists keys that are useful when navigating within views and windows.

Table 3.1 Key Tips and Keyboard Shortcuts

Key Tips & Shortcut	Outcome
Tab	Move right one field in an Entry table or dialog box.
Shift+Tab	Moves left one field in an Entry table or dialog box.
Home	Moves to the beginning of a row or field of information.
End	Moves to the end of a row or field of information.
Page Up	Moves up one screen.
Page Down	Moves down one screen.
Alt + Page Up / Alt + Page Down	Moves left or right one screen on the time scale.
Alt + ⇐ / Alt + ⇒	Moves the time scale one unit left or right (as defined by the bottom time scale tier).

**Table 3.1** Key Tips and Keyboard Shortcuts

Key Tips & Shortcut	Outcome
<b>Alt + Home</b>	Moves to the project start date in the bar chart.
<b>Alt + End</b>	Moves to the project finish date in the bar chart.
<b>Ctrl + Home</b>	Moves to the first field in the first row of the Entry table or the same location in any other sheet view.
<b>Ctrl + End, Home</b>	Moves to the first field in the last row of the Entry table or the same location in any other sheet view.
<b>Ctrl + ↑</b>	Moves to the First Row.
<b>Ctrl + ↓</b>	Moves to the Last Row.
<b>F1</b>	Turns on Project Help.
<b>F2</b>	Activates in-cell editing for the selected field.
<b>F3</b>	Displays all tasks or resources when a prior filter was applied.
<b>F5</b>	Goes to a specific row ID number or a date on the time scale.
<b>F6</b>	Activates the other pane in a combination or dual-pane view.
<b>F10</b>	Press twice to turns on Key Tips. You can also tap the Alt key.

**Table 3.1** Key Tips and Keyboard Shortcuts

Key Tips & Shortcut	Outcome
Ctrl + Shift + F5	Displays the Gantt bar for the selected task.
Ctrl + F4	Closes the Project window.
Ctrl + F5	Changes the Gantt Chart view from maximized to previous size (i.e., view window is separated from Project window).
Ctrl + F10	Maximizes the Gantt Chart view and combines it with the Project window.
Ctrl + F9	Allows you to turn on and off Auto Calculate.
Ctrl + F6	Displays the next open Project window.
Ctrl + Shift + F6	Displays the previous open Project window.
Alt + Spacebar / Alt + Hyphen	Displays the application control menu.
Insert	When the Task ID is selected, a new blank row is added in the Entry table.
Delete	When the Task ID is selected, a row is deleted from the Entry table.
Alt + F3	Displays the Field Settings dialog box for the active column.
Alt + F4	Closes Project.

**Table 3.1** Key Tips and Keyboard Shortcuts

Key Tips & Shortcut	Outcome
<b>Shift + F2</b>	Displays Task Information in Gantt Chart view. Displays Resource Information in Resource Sheet view.
<b>Shift + F3</b>	Sorts by ID number.
<b>Shift + F6</b>	Enables the horizontal and vertical split bars in Gantt Chart view.
<b>Shift + F11 / Alt + Shift + F1</b>	Creates a new version of your schedule (e.g., Project: 2).



## Chapter 4

# **Start a Project**

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## Creating New Projects

---

One of the very first things you need to do to create a project is to choose an approach.

The approaches to start a project include the following:

- Blank – clean schedule
- New From Existing – copy from existing schedule
- New From Excel – importing information from Excel
- New From SharePoint Tasks List – shortcut to bring SharePoint tasks into your schedule
- Get Started Wizard – guided approach with visuals to help individuals feel more comfortable working in a schedule
- Template – public or private pre-built schedules that can be used as examples



If you do not have Internet access, you may not have all of these choices.



Office 365 or cloud users may have different choices depending on their organization's configuration.

---

## How to Start a New Project

---

1. Click the File tab
2. Click **New**
3. Click the desired item from the previews
4. If needed, click **Create** to obtain a copy of that item to start your schedule



Templates available are simply examples and may not map to your organization's project management practices. Be sure to review the templates for modifications that you might need to make.



---

## **Saving a project**

---

Saving a project is all about storing a project for quick and easy retrieval. You may choose to store your project on your computer, on a network location, or on a cloud storage solution. As each organization's configuration is different, we will focus on the procedures for saving to your local computer.

---

## How to Save a New Project

---

1. Click the **File** tab
2. Click **Save** or **Save As**
3. Click **Computer**
4. Click **Browse**
5. Navigate to the desired folder
6. Enter the desired name for the schedule
7. Click **Save**



The folder you just used will be available under Recent Folders to simplify this process for future new projects.



When making changes to the same project, you can use the Save icon on the Quick Access Toolbar as a fast method to ensure your project changes are being captured.

---

## **Opening a Project**

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Since opening projects is such a frequent task, you should take advantage of quick methods to do this. The following steps will help you optimize your environment for speedy retrieval of projects.

---

## How to Open a Project

---

1. Click the File tab
2. Click Open
3. Click Computer
4. Click Browse
5. Navigate to the desired folder
6. Select the name for the schedule
7. Click Open



Click Recent Projects to quickly retrieve a project you have previously opened.



Pin a project to the top of the recent project list if you anticipate you will be using it on a regular basis.

---

## Creating a New Project

---

When Project 2010 is initiated, a new blank project schedule will automatically appear.

To create a blank project schedule:

- Click **File** → **New**

Backstage choices shown below will give you an array of choices of where to begin a new project schedule. As you click the various choices, options and additional data will appear on the right side of the view.

- Double clicking **Blank project** or click **Blank project** and click **Create** will result in creating a blank project file
- **Recent Templates**: Create a project from a recently used template
- **My templates**: Template created by you and saved to your desktop
- **New from an existing project**: Use an existing project schedule to create a new project

- **New project from Excel workbook:** Columns in the Excel workbook will be mapped to fields within Project 2010. The import process is discussed in the next lesson.
- **New from Sharepoint task list:** Project 2010 Professional only. Tasks will be imported using the URL and security of the Sharepoint site.
- **Office.com templates:** Create a new project from a template that would be downloaded from Office.com on-line
- If the Quick Access Bar was customized to add the **New** button, pressing that button will create a new project schedule

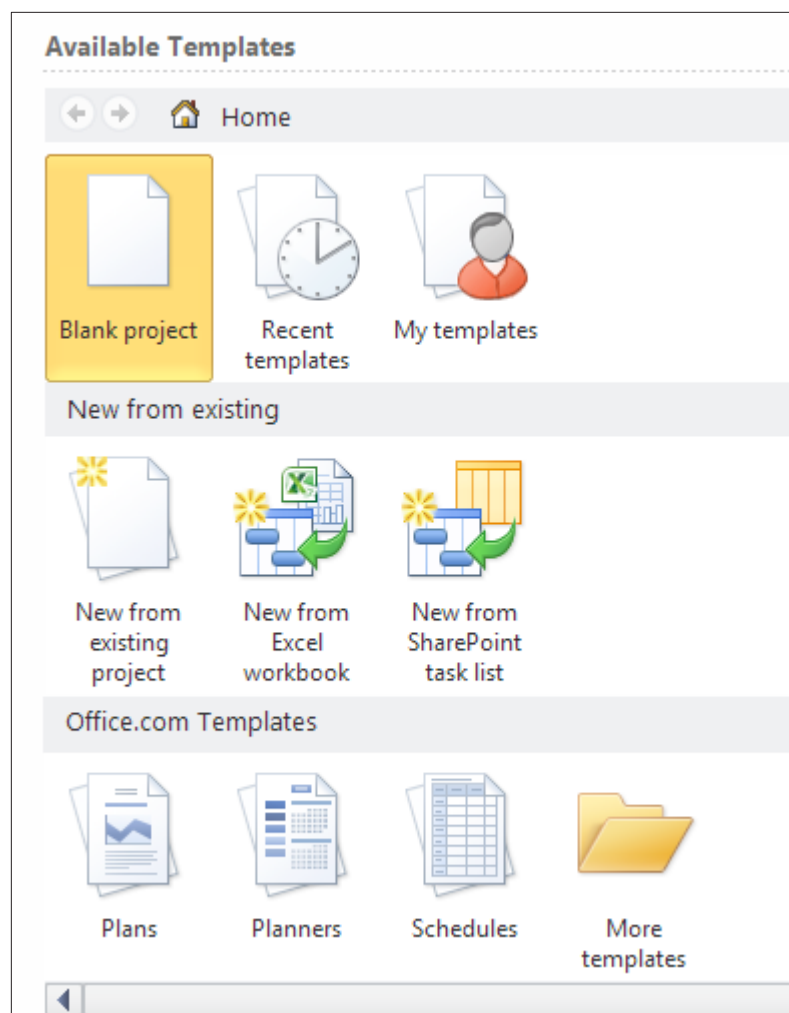


Figure 4-1 PLACEHOLDER

## Creating a Project from an Excel Workbook

A project schedule can be created using an Excel Workbook task list. Keep in mind that the fields or columns that are being imported from Excel will be mapped to fields or columns within Project 2010. Pre-planning to know which Excel fields should be mapped to which Project 2010 fields would be helpful.



All options should be pre-set before importing tasks.

To create a project schedule from an Excel Workbook:

1. Click **File** → **New** → **New From Excel Workbook**
2. Navigate to the Excel file that contains the tasks to be imported into the schedule, click **Open**
3. Project 2010 Import Wizard will start running – Click **Next**
4. Select whether to use a new map that will be created or an existing Project import map. For this example we will create a new map. Click the radio button next the **New Map** and click **Next**
5. Import can start a new project file, append to the end of an existing project file or merge the data using a merge field. In this example we will create a new project schedule. Click **As a new project** and click **Next**.
6. When the data is brought into Project 2010, select if the data is to be mapped to the Task fields, Resource fields or Assignment fields. Click **Tasks**.
7. If the originating Excel file contains header or title information, click **Import includes Headers**. The system will remove this row (the first line only) as the header row. Click **Next**
8. The Task Mapping form will be used to view some of the data and map which Excel fields will be imported into which Project 2010 fields. Pull down the values in the **Select worksheet name** option and select the sheet name in Excel that contains the data to be imported. After the choice has been made, the data from the sheet will be available for viewing.
9. In the example below, the duration field from the Excel Workbook was able to be automatically mapped to the duration field in Project 2010. However, the Task Name field could not find a match. The correct field name for the

task name field in Project 2010 is “Name”. Click the red error message (**not mapped**) and select the field name of **Name**. Repeat for other fields to be imported. Not all fields are required during the import process which allows the user to pick and choose which ones are appropriate to the schedule. Click **Next** to continue after all columns have been mapped.

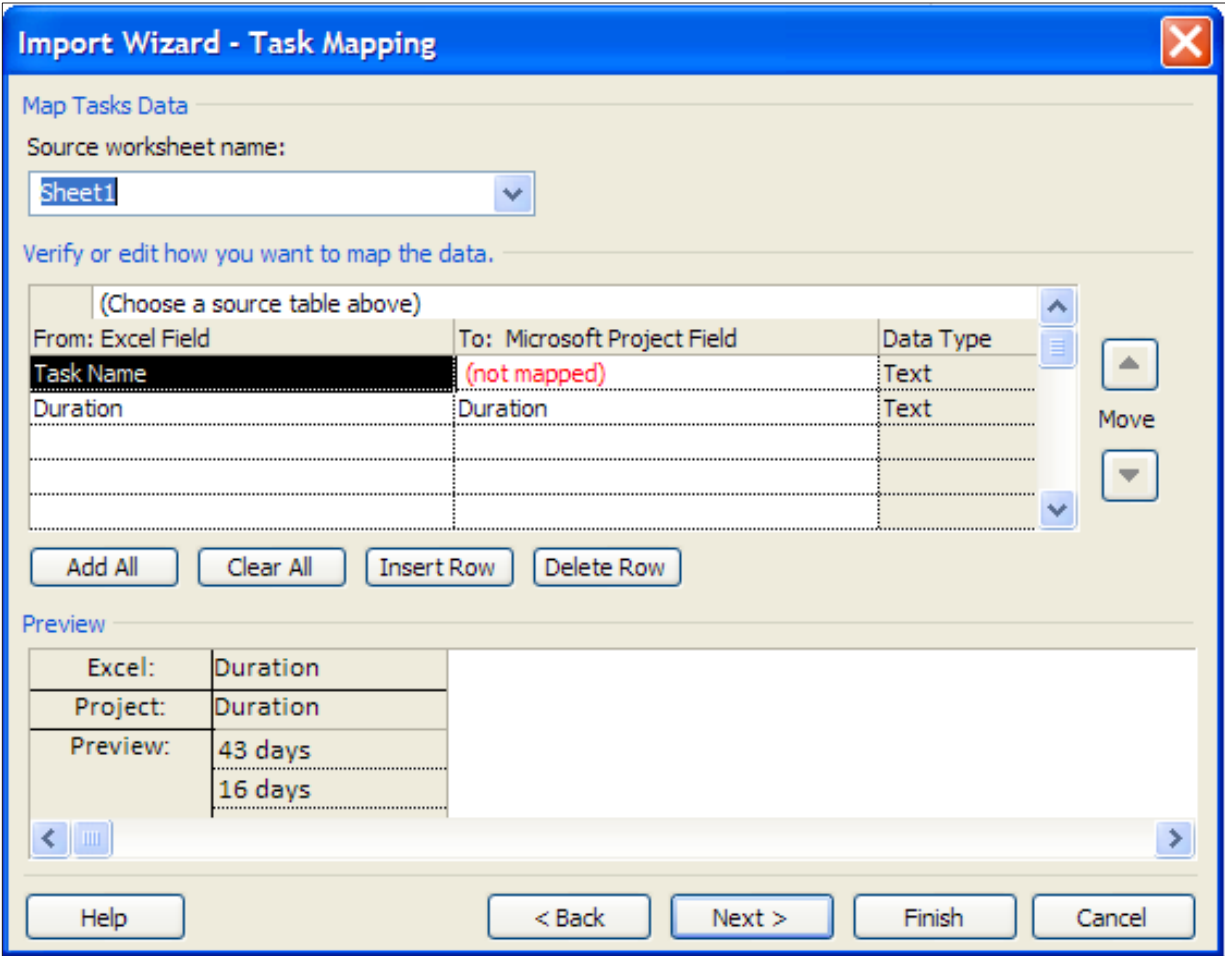


Figure 4-2    PLACEHOLDER

- 10. The next step offers the option to save the map for future reuse.
  - a. To skip saving the map, click **Next**.
  - b. To save the map, click **Save Map** and give the map a name.

An option will be available to use the Organizer to copy the import map into the Global.mpt and save it for future use. The Organizer will be discussed in Module 10.

Click **Finish** to start the import.

11. The new Project 2010 schedule will open with the columns imported.

## Creating a Project from a SharePoint Task List

Project 2010 Professional allows for creating a new project by importing a task list from a SharePoint site. The user must have appropriate permissions to access the SharePoint site and the URL path to insert into the form directing Project 2010 Pro to the location of the task list.

To import tasks from a SharePoint task list into Project 2010

Professional:

1. Click **File** → **New** → **New** from SharePoint Task List

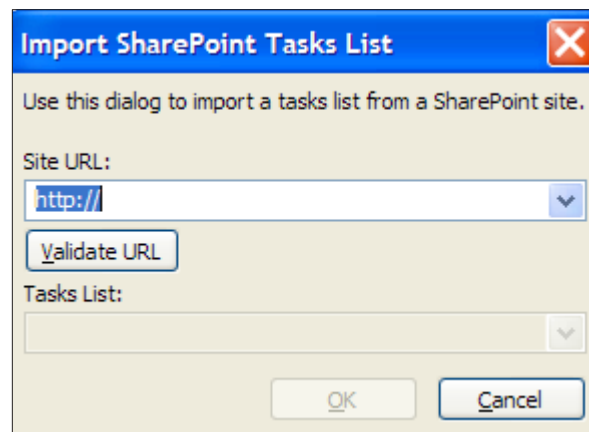


Figure 4-3 PLACEHOLDER

2. Enter the **URL** in the form as shown above and click **Validate URL**. A list of all the task lists included in the SharePoint site will be displayed. Select the appropriate list and click **OK**.

The list will be imported from the SharePoint site.



This is Pro only – Rolly should add a screen shot here.



## Saving the Schedule

---

Project 2010 provides multiple file formats for a project schedule. The steps to save a file are very similar to other ms Office files.

To save the Project 2010 schedule:

1. Click **File** → **Save as** → **select file location**
2. Enter the file name in the File Name area
3. Click **Save** to complete the save. The file will be given a Project 2010 default file extension of .mpp

There is also an option to save the Project 2010 schedule in an alternative file format. Some of the formats are:

- ms Project 2007
- ms Project 2000-2003
- ms Project template 2010 - .mpt file extension
- ms Project template 2007 - .mpt file extension
- ms Excel
- PDF
- XPS
- XML
- CVS
- Text

## Save and Send Options

---

A new feature in Project 2010 is the Save and Send from the backstage view. These options are an easy method of saving projects and sharing project schedules with others. There is also an option to send project files as an attachment to an email as well as publishing the project schedule to a SharePoint site (Project 2010 Pro users only).

To navigate to the options available for Save and Send:

- Click **File** → **Save and Send** → **select one of the options offered**



The right side of the screen will change as options are selected

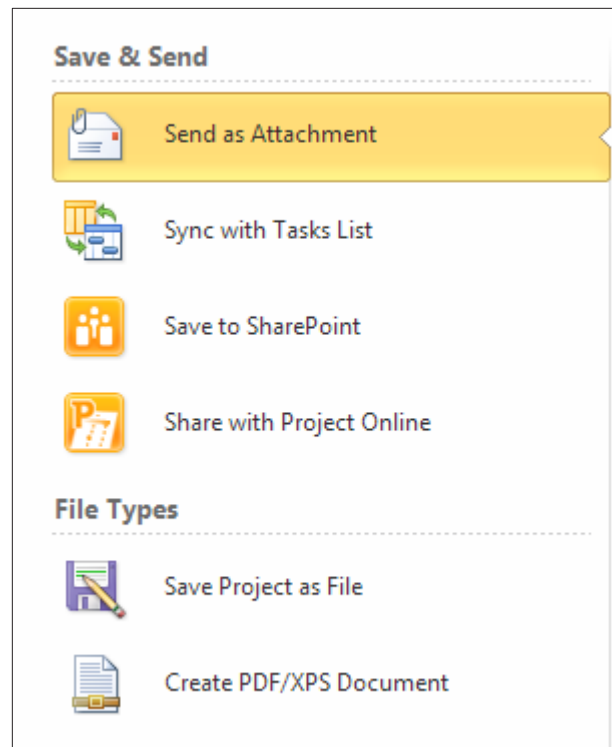


Figure 4-4 PLACEHOLDER

- **Send as Attachment:** sends the project schedule as an attachment to an Outlook email
  - **Sync with Tasks List:** use this option to synchronize with a task list in SharePoint. Team members can update task status and the updates can be synchronized back to the project schedule. The URL to the SharePoint site and the task list name will be needed at the time of the synchronization.
  - **Save to Sharepoint:** this option will save the project schedule to a Sharepoint site. (Project 2010 Pro users only)
  - **Share with Project Online:** used with Project Server and SharePoint
- Save Project as a file:** when clicked the right side of the view is shown below. There are several file type options available. Click **Project** and **Save As** to start the save process.

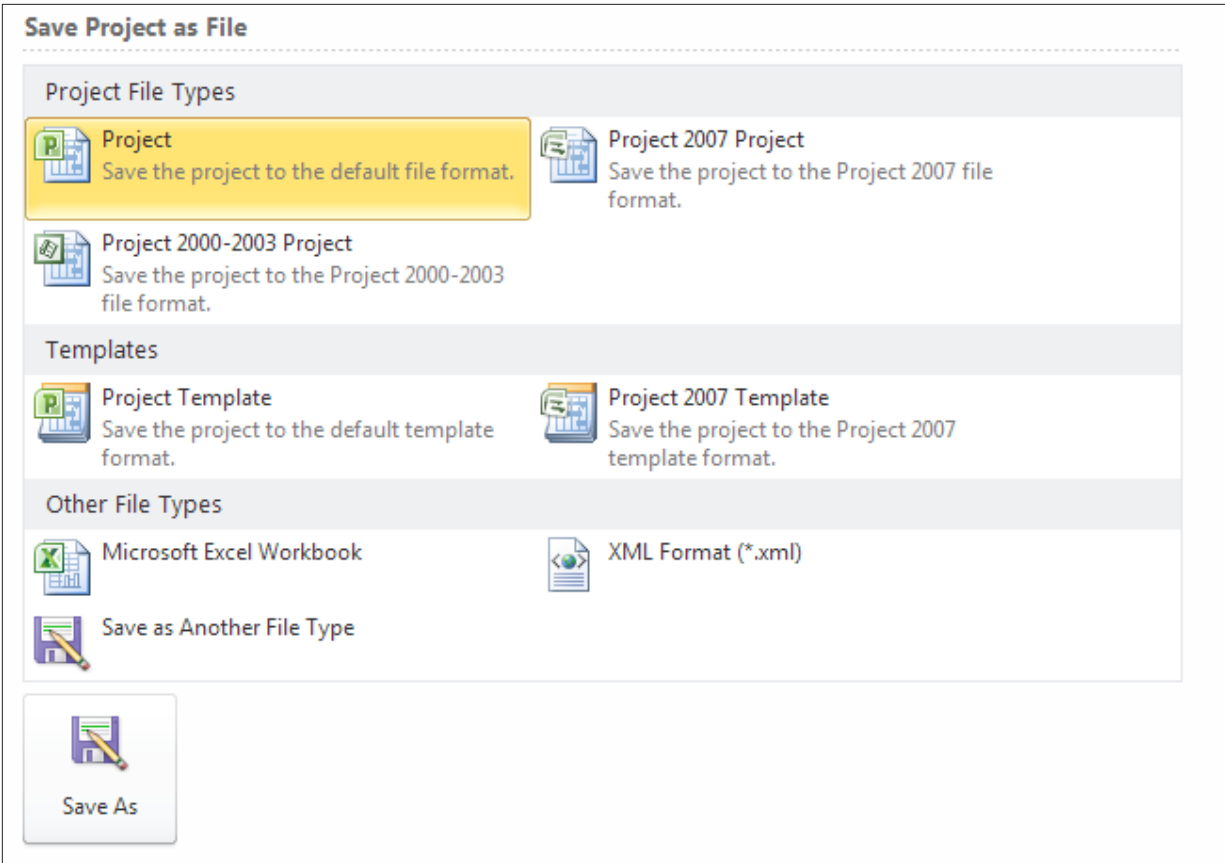


Figure 4-5    PLACEHOLDER

- **Create a PDF/XPS document:** Click Create PDF/XPS, name the file and select PDF or XPS, click OK to complete the save.

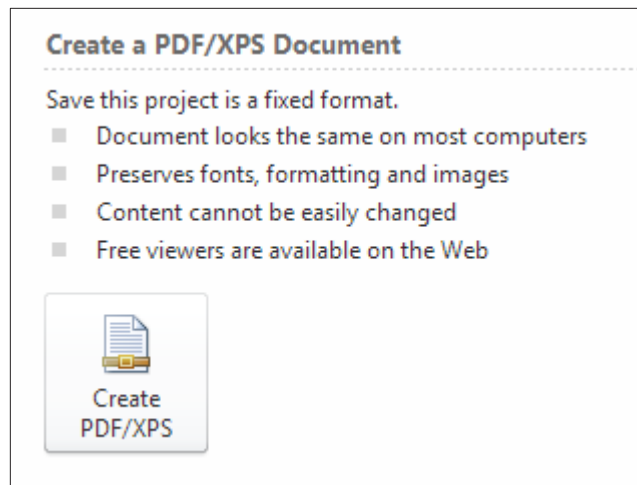


Figure 4-6 PLACEHOLDER

## Saving the Schedule

Project 2010 provides multiple file formats for a project schedule. The steps to save a file are very similar to other MS Office files.

To save the Project 2010 schedule:

1. Click **File** → **Save as** → **select file location**
2. Enter the file name in the File Name area
3. Click **Save** to complete the save. The file will be given a Project 2010 default file extension of .mpp

There is also an option to save the Project 2010 schedule in an alternative file format. Some of the formats are:

- MS Project 2007
- MS Project 2000-2003
- MS Project template 2010 - .mpt file extension
- MS Project template 2007 - .mpt file extension
- MS Excel
- PDF
- XPS

- XML
- CVS
- Text

## Save and Send Options

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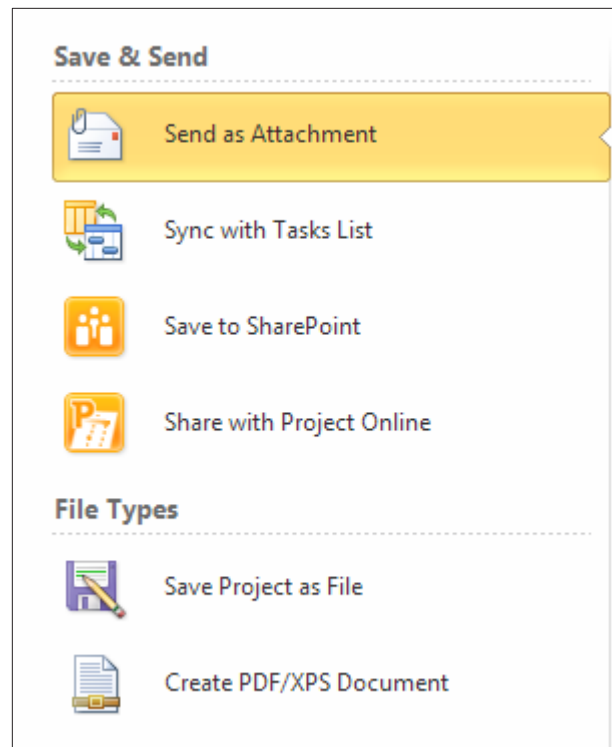
A new feature in Project 2010 is the Save and Send from the backstage view. These options are an easy method of saving projects and sharing project schedules with others. There is also an option to send project files as an attachment to an email as well as publishing the project schedule to a SharePoint site (Project 2010 Pro users only).

To navigate to the options available for Save and Send:

- Click **File** → **Save and Send** → **select one of the options offered**



The right side of the screen will change as options are selected



**Figure 4-7** PLACEHOLDER

- **Send as Attachment:** sends the project schedule as an attachment to an Outlook email
  - **Sync with Tasks List:** use this option to synchronize with a task list in SharePoint. Team members can update task status and the updates can be synchronized back to the project schedule. The URL to the SharePoint site and the task list name will be needed at the time of the synchronization.
  - **Save to Sharepoint:** this option will save the project schedule to a Sharepoint site. (Project 2010 Pro users only)
  - **Share with Project Online:** used with Project Server and SharePoint
- Save Project as a file:** when clicked the right side of the view is shown below. There are several file type options available. Click **Project** and **Save As** to start the save process.

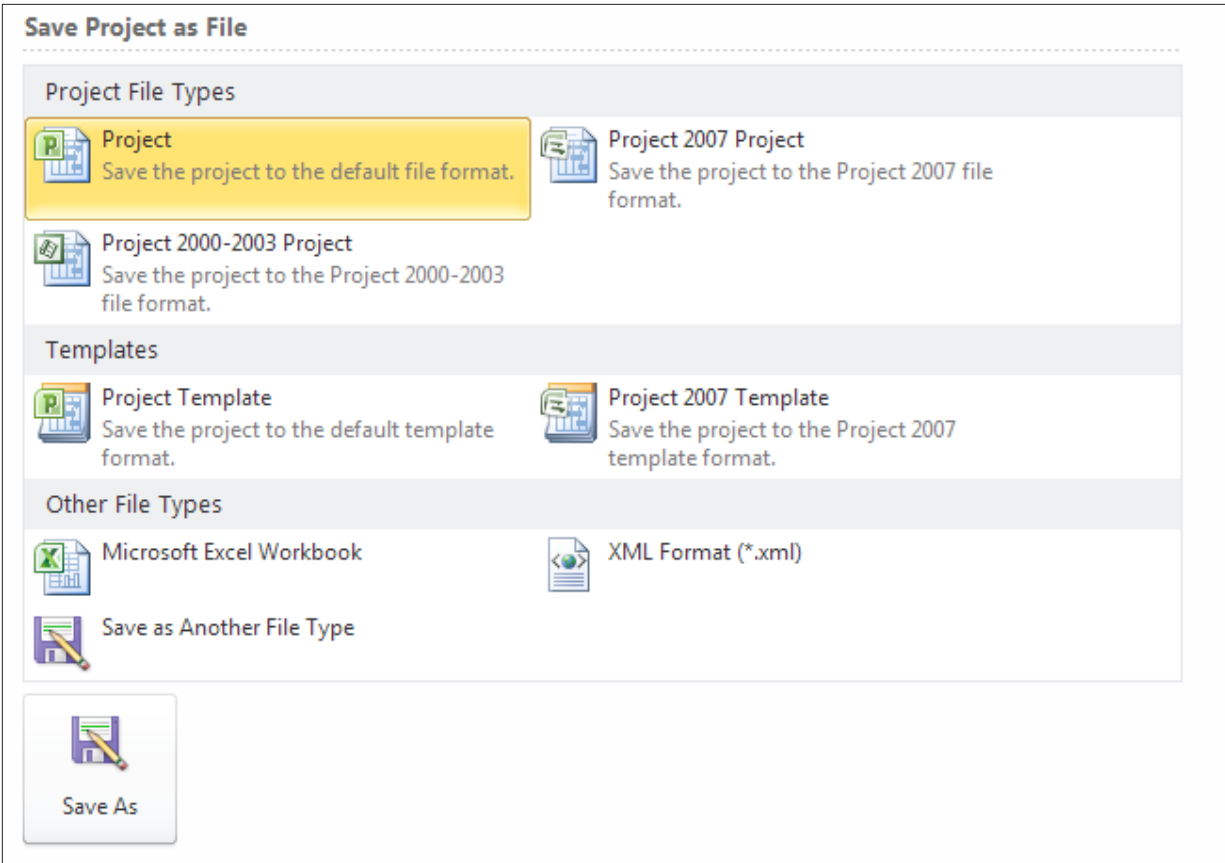


Figure 4-8    PLACEHOLDER

- **Create a PDF/XPS document:** Click Create PDF/XPS, name the file and select PDF or XPS, click OK to complete the save.

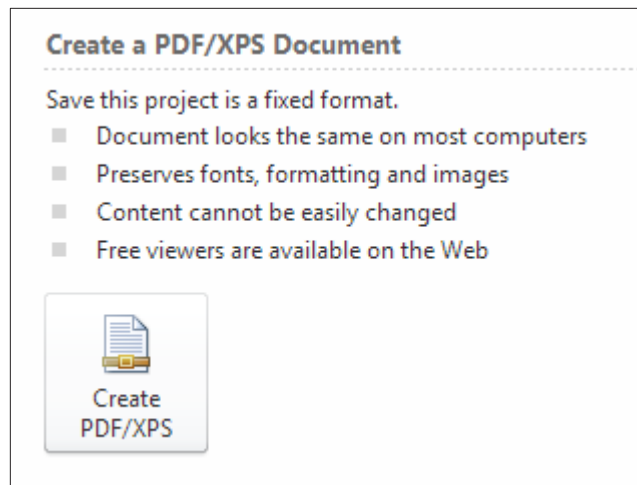


Figure 4-9 PLACEHOLDER

## Save and Send Options

A new feature in Project 2010 is the Save and Send from the backstage view. These options are an easy method of saving projects and sharing project schedules with others. There is also an option to send project files as an attachment to an email as well as publishing the project schedule to a SharePoint site (Project 2010 Pro users only).

To navigate to the options available for Save and Send:

- Click **File** → **Save and Send** → **select one of the options offered**



The right side of the screen will change as options are selected



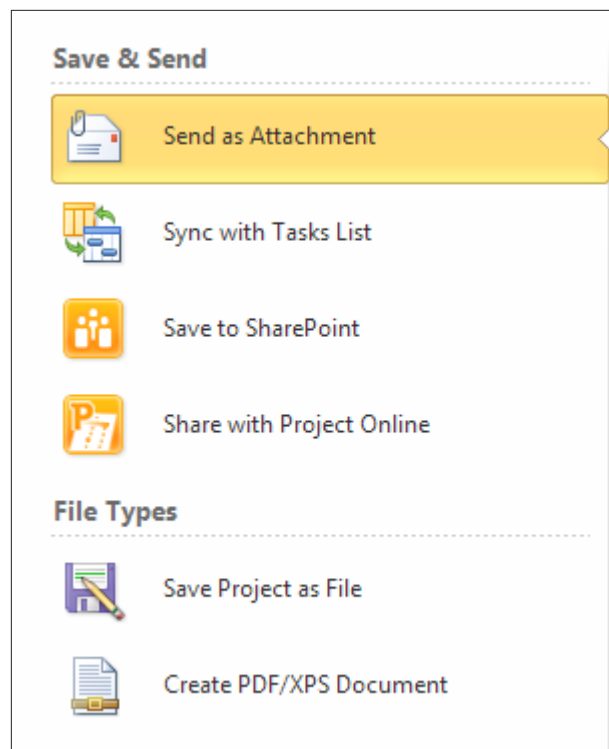


Figure 4-10 PLACEHOLDER

## Save and Send Options

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A new feature in Project 2010 is the Save and Send from the backstage view. These options are an easy method of saving projects and sharing project schedules with others. There is also an option to send project files as an attachment to an email as well as publishing the project schedule to a SharePoint site (Project 2010 Pro users only).

To navigate to the options available for Save and Send:

- Click **File** → **Save and Send** → **select one of the options offered**



The right side of the screen will change as options are selected

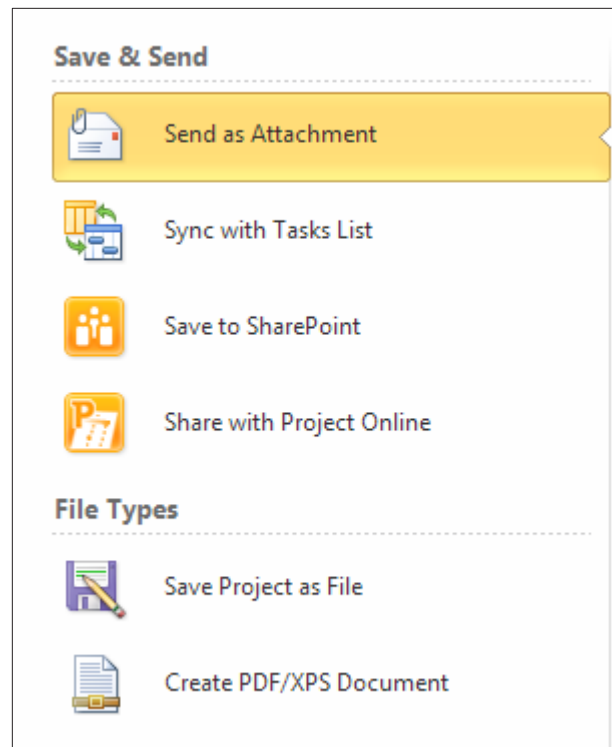


Figure 4-11 PLACEHOLDER

- **Send as Attachment:** sends the project schedule as an attachment to an Outlook email
  - **Sync with Tasks List:** use this option to synchronize with a task list in SharePoint. Team members can update task status and the updates can be synchronized back to the project schedule. The URL to the SharePoint site and the task list name will be needed at the time of the synchronization.
  - **Save to Sharepoint:** this option will save the project schedule to a Sharepoint site. (Project 2010 Pro users only)
  - **Share with Project Online:** used with Project Server and SharePoint
- Save Project as a file:** when clicked the right side of the view is shown below. There are several file type options available. Click **Project** and **Save As** to start the save process.

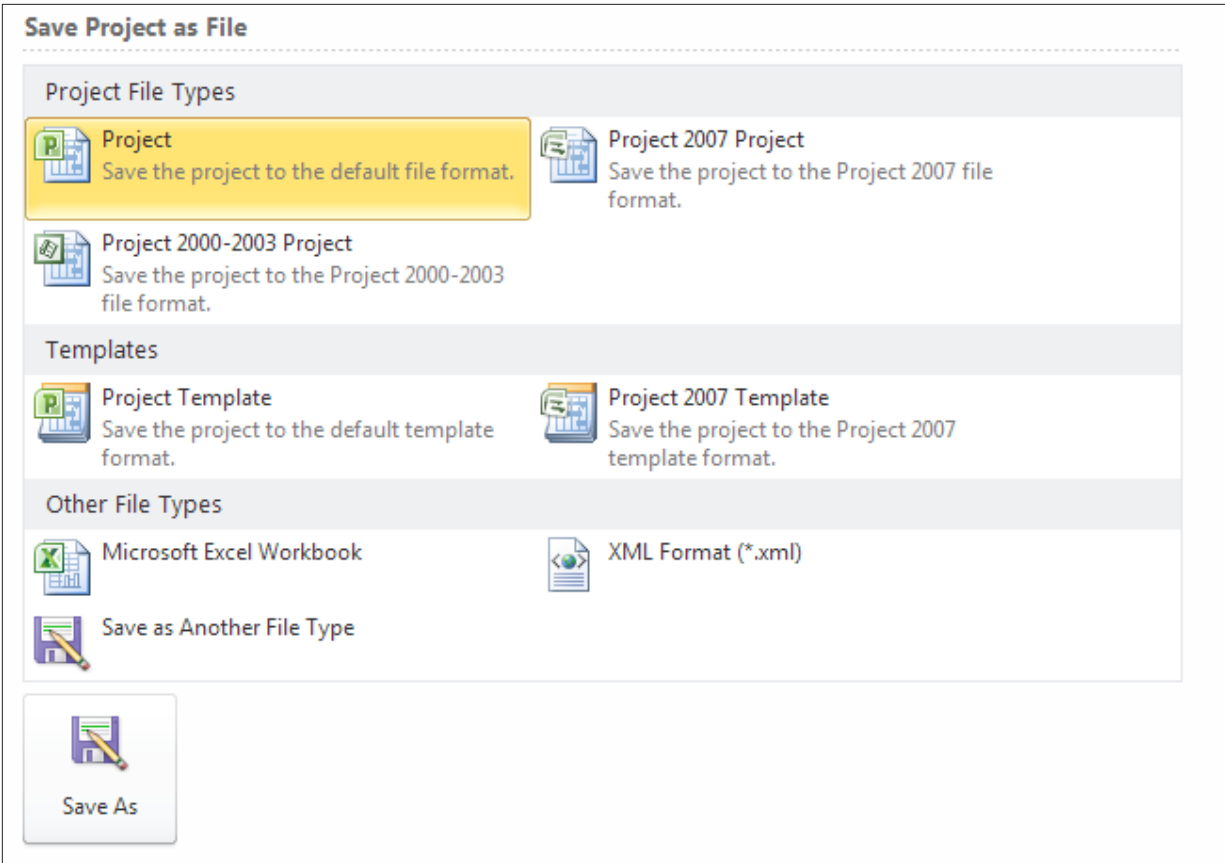


Figure 4-12    PLACEHOLDER

- **Create a PDF/XPS document:** Click Create PDF/XPS, name the file and select PDF or XPS, click OK to complete the save.

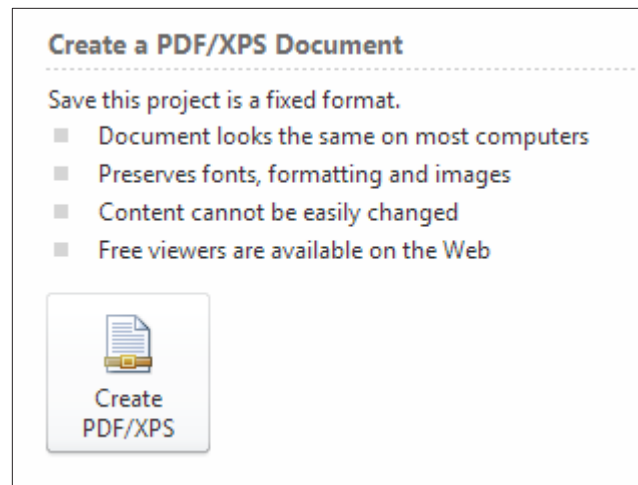


Figure 4-13 PLACEHOLDER

---

## Calendar Overview

---

Calendars in Project 2010 will determine when a task may be scheduled within the project schedule. It will also influence what defines a day, a week and a month. The calendars will also work hand-in-hand with the calendar options to determine when and how the tasks will be scheduled.

In this lesson we will explore:

1. How calendars work in Project 2010
2. How to create a base calendar
3. How to Set Working Hours and Days
4. How to Set Non-Working Hours and Days
5. How to Set Calendar Options

## How Calendars Work in Project 2010?

---

There are several types of calendars within the Project 2010 system. The following are definitions of available calendars:

- **Base Calendar:** The base calendar which may be used to as a template to create other calendars. A base calendar may also be used as a Project, Resource or Task calendar.
- **Project Calendar:** The project calendar is the calendar assigned to a project and it defines the project working and non-working days. The default name for the Project Calendar is “Standard”.
- **Resource Calendar:** Each resource will have its own calendar which may be based off of a base calendar or the project calendar. Unique resource calendars may also be created.
- **Task Calendar:** A task calendar is assigned to a task to allow for the scheduling of that task in a unique timeframe. For example: tasks which have to occur on a weekend.

How the calendars are used by the software:



A task will be scheduled based on the Project calendar until a resource is assigned to the task. At that time, the Resource calendar will control the scheduling of most tasks. Unless – there is a task calendar assigned which will override the Project and the Resource calendars.

When a project schedule is created, a default calendar of “Standard” is applied to the schedule. This is called the project calendar for the project. The default values on the Standard calendar are: Monday through Friday which are working days, and working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily. No holidays are indicated on the calendar. The Standard calendar is also the calendar that will be viewed in the background of the Gantt Chart views. The Calendar Options work hand in hand with the Project Calendar to determine number of hours in a day or week and these values should be in sync with one another. The Calendar options will be discussed in the next section.

By default, 2 additional calendars are included in Project 2010: a 24 hour calendar and a Night Shift calendar. Either of these may be used as Project, Resource or Task calendars.

## FAQ's

Q: Why are there no holidays on the calendars?

A: This is an international program. Holidays vary from country to country.

Q: Is there the ability to add holidays to a calendar the way they can be added in Outlook?

A: No – this is not a capability of the software.

Q: Do I have to recreate the calendar for each project?

A: No – calendars may be created and saved through the Organizer to use in future projects.



The default calendar name for the system is “Standard”. If a different calendar name is selected, each Gantt view will also require changing because Gantt Chart views are set to display the Standard calendar. This change can be made by right clicking in the Gantt view and select Non-working time and changing to the calendar to be seen in the view. Most users keep the Standard calendar because of ease of use.

---

## Setting Working Hours and Days

---

After the base calendar has been created, decide what the working days (business days) of the project schedule will be. Decide also, how many hours will make up a working day and what times the hours will be. By default, the working days of the calendar are Monday through Friday and the working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily or 8 hours working per day.

Ask yourself, how many hours per day do you feel your resources work productively on project work?

The average amount of productive project time in a day for a full time resource is 6 to 6.5 hours. If you are planning projects using an 8 hour day and your resources produce 6.5 hours per day are you planning an unreasonable timeline for your project schedule. After resources are assigned to tasks, the resource availability calendar will be considered in the scheduling equation and the timeline for the project schedule will alter substantially. It is expected that schedules will double in length once actual resources are assigned to tasks.

This difference to the schedule may be handled through adjustments to the project calendar, to the assignments or to the resource calendars. Consider choosing one of the methods and using it as the standard for scheduling projects. Each of the above options has their pros and cons, but it is the crossing of methods that will result in unreliable results in planning a schedule.

To Change the Working Hours of all Days on a Calendar:

1. Click **Project → Change Working Time**

2. Check to ensure the calendar you wish to change is displayed in the **For calendar** list
3. Click **Work Weeks** near the bottom of the dialogue box

**Change Working Time**

For calendar: **Standard (Project Calendar)** Create New Calendar ...

Calendar 'Standard' is a base calendar.

**Legend:**

- ☐ Working
- ☐ Nonworking
- ☒ Edited working hours
- ☒ Exception day
- ☒ Nondefault work week

Click on a day to see its working times:

February 2010

S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Working times for February 10, 2010:

- 8:00 AM to 12:00 PM
- 1:00 PM to 5:00 PM

Based on:  
Default work week on calendar 'Standard'.

**Exceptions** **Work Weeks**

Name	Start	Finish
1 [Default]	NA	NA

Details... Delete

Help Options... OK Close

**Figure 4-14** PLACEHOLDER

1. After clicking on the **Work Weeks** tab, the word **Default** should be highlighted. Click the **Details** button to the right of the form
2. Click **Monday**, press and hold the **shift** key and click on **Friday**. All of the working days will be selected
3. Click the **3rd radio button, Set day(s) to these specific working times**
4. You will see the standard working times. Make changes to reflect the new values
5. Click **Enter** or **Tab** to move away from the value you have changed
6. Click **ok** to close the form



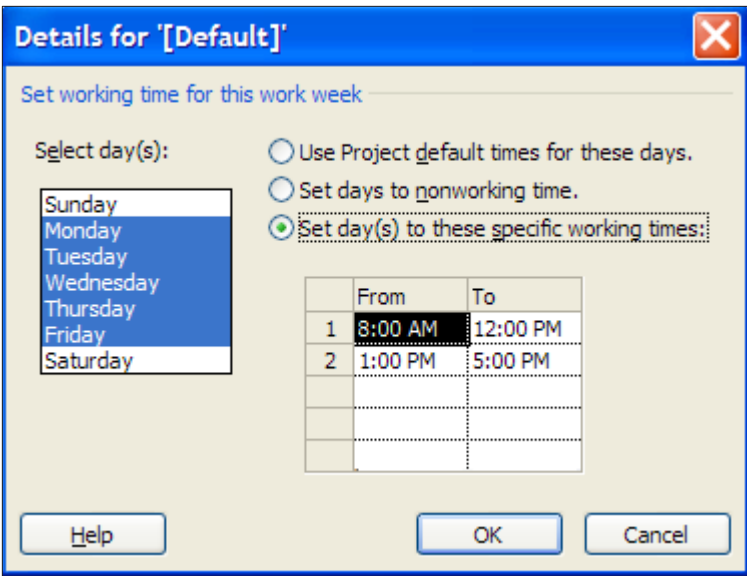


Figure 4-15    PLACEHOLDER



Military time is valid when entering hour values. To change 5:00 pm to 4:00 pm to shorten the work day, simply enter **16** where 5:00 pm is located and click **Enter** or **Tab** and 4:00 pm will appear.

## Setting Non-Working Hours and Days

---

Non-working time is defined in the software as days where work will not be planned or performed. Examples are: national and organizational holidays, training days, company shutdowns, summer hours, etc. Adding these non-working days and times to the project calendar will allow for the scheduling of the tasks to be excluded from these dates.

A frequently asked question is: Is there the ability to add holidays to a calendar the way they can be added in Outlook? The answer is no - this is not a capability of the software. However, creating recurring holidays and

non-working times is a feature of Project 2010.

How to Create a Non-working Day for a Calendar:

1. Click **Project** → **Change Working Time**
2. Check to ensure sure that the calendar you wish to change is displayed in the **For Calendar** field
3. Click **Exceptions** tab near the bottom of the dialogue box

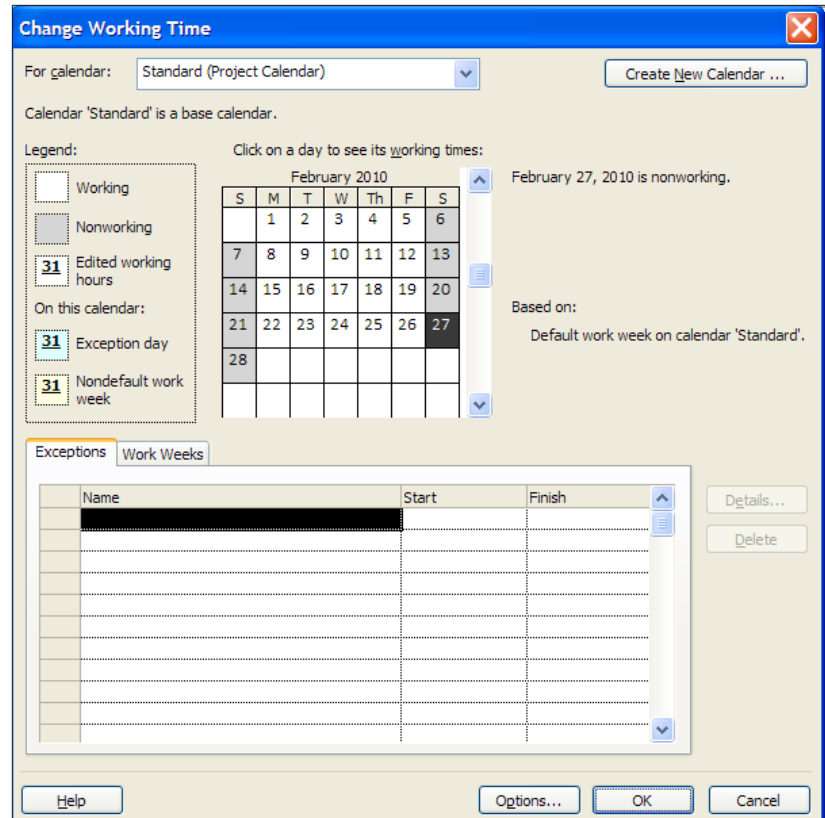


Figure 4-16 PLACEHOLDER

4. In this example, we will set April 8, 2011 as a non-working day. Move the slider on the right side of the calendar down until **April 2011** is displayed in the calendar
5. Click **April 8, 2011**
6. Click in the name field and enter a reason for the non-working day, ie: Company holiday
7. Click **Enter**
8. Repeat for additional non-working days. See the result below

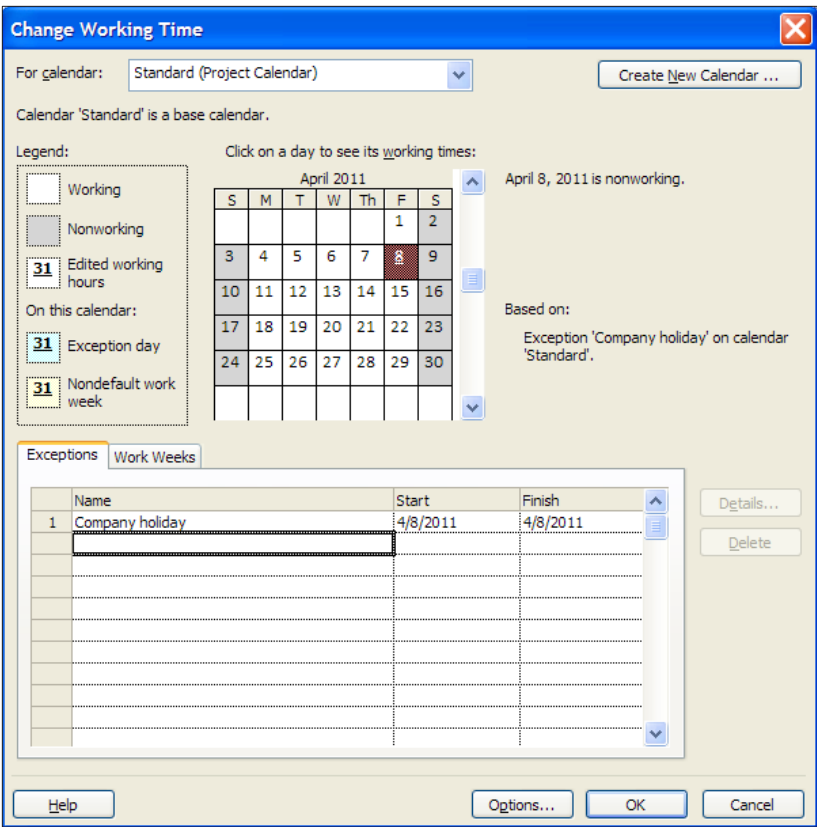


Figure 4-17 PLACEHOLDER

To Create a Recurring Non-working Day for a Calendar:

1. Click **Project** → **Change Working Time**
2. Check to make sure that the calendar you wish to change is showing in the **For calendar** field
3. Click **Exceptions** the tab near the bottom of the dialogue box
4. In this example, we will set January 1 (New Year's Day) as a recurring non-working day. Move the slider on the right side of the calendar down until **January 2013** is displayed on the calendar
5. Click **January 1, 2013**
6. Click in the first open line in the **Name** field and enter **New Year's Day** for the non-working day
7. Click **Enter**
8. Click back on the words **New Year's Day** and then click on the **Details** button to the right of the form

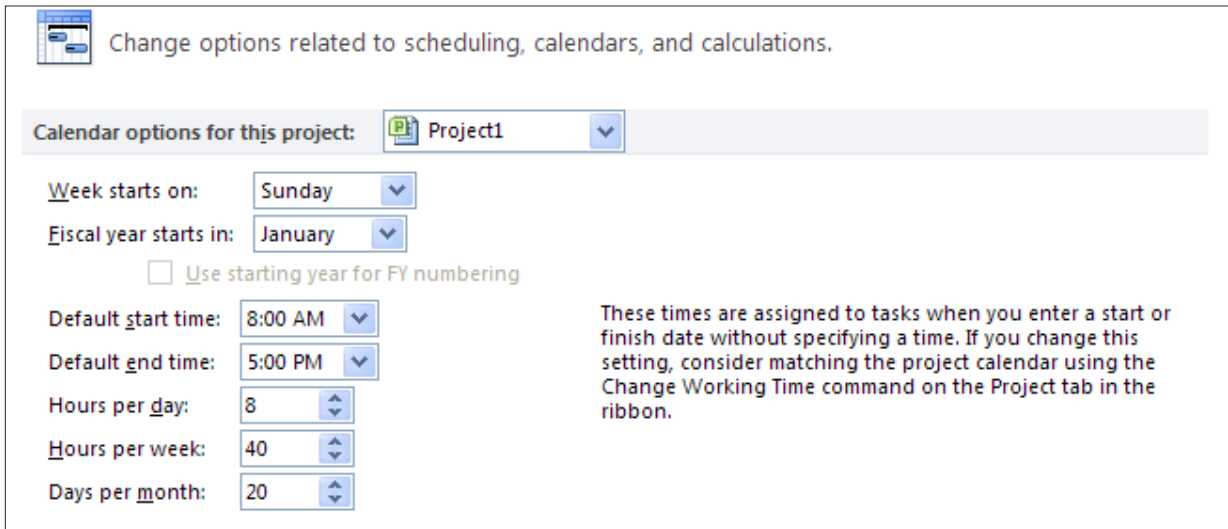
9. Click **Yearly**
10. Click on January 1
11. Enter the start date
12. Enter a recurrence value or an End by date
13. Click **OK** to close box
14. Check for the recurrence values in the Exceptions line for New Year's Day.

## Setting Calendar Options


The Calendar options work hand in hand with the project calendar to determine how tasks will be scheduled. It is imperative that the calendar options match the project calendar to create a consistency in the scheduling values for tasks and assignment values.

To access the Calendar options:

Click **File** → **Options** → **Schedule**



Change options related to scheduling, calendars, and calculations.

Calendar options for this project:  Project1 ▼

Week starts on: Sunday ▼

Fiscal year starts in: January ▼

☐ Use starting year for FY numbering

Default start time: 8:00 AM ▼

Default end time: 5:00 PM ▼

Hours per day: 8 ▼

Hours per week: 40 ▼

Days per month: 20 ▼

These times are assigned to tasks when you enter a start or finish date without specifying a time. If you change this setting, consider matching the project calendar using the Change Working Time command on the Project tab in the ribbon.

Figure 4-18 PLACEHOLDER

What the options mean:

- **Calendar options for this project:** option to select whether your option choices for the calendar will be held within an individual project or if they will be applied to all new projects.
- **Week starts on:** this choice will affect what is assigned and viewed as the first day of the week. The day chosen will be reflected on the Gantt Chart, Resource Usage, Task Usage and other calendar views.
- **Fiscal Year starts in:** if using this option, select which month will be the start of the fiscal year.
- **Default start and end times:** these values should match the time values on the project calendar. Assigning the project calendar will be discussed in the next lesson. The times stated here will be used to schedule tasks when time is not specified for a task. It will also be used to schedule tasks that do not use relationships. For example: if recurring tasks are created, the tasks will always be scheduled at the start time represented in this option.
- **Hours per day:** when 1 day of work is scheduled, how many hours should 1 day consist of?
- **Hours per week:** when 1 week of work is scheduled, how many hours should 1 week consist of?
- **Days per month:** when 1 month of work is scheduled, how many days should 1 month consist of?

## Saving the Calendar

---

In Project 2010, the calendar that was just created is known as a “custom object”. Custom or customized objects may be saved for use in the project the object was created in and used in other projects as well. To save objects the Organizer is used. When Project 2010 was installed on your system, a file named Global.mpt was created. The Organizer is the function that will copy objects into the Global.mpt as well as between project schedules. Calendars are only one of many object types that may be customized and saved for use in other project schedules. The other objects will be discussed in Module 10. In this lesson, we will only address the Calendar.

To save the custom or customized calendar, the object must be copied

using the Organizer.

To copy a New Base Calendar into the Global.mpt:

1. Click **File** → **Info** → **Organizer**
2. Click the **Calendars** tab
3. Click **New Base Calendar** to the right and click **<<Copy**
4. Click **Cancel** to close the box

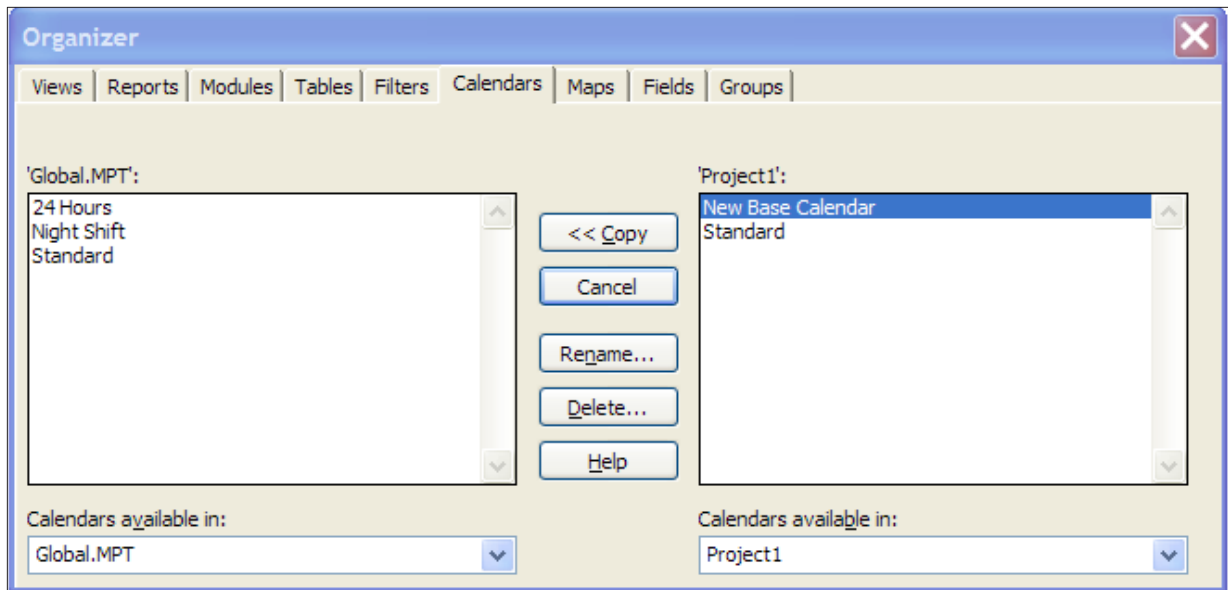


Figure 4-19 PLACEHOLDER

The Calendar will be copied into your local Global.mpt.

## Practice: Creating Calendars

The Practice page is where you write detailed instructions for completing work listed as Exercises.

Type the Exercise Title and write a brief summary what the student will be doing in the exercise. Then list your ideas what they will be doing.

### SAMPLE

In this practice you will create a Project Server Authentication profile

and then configure the local cache settings in Project Professional 2007.

## Exercise 1: Create Project Server Authentication Profile

In this exercise you will create Project Server authentication profile to connect to the Project Web Access site.



Perform the following exercise on the ps07 virtual machine.

1. From the **Start** menu, click **All Programs → Microsoft Office → Microsoft Office Tools** and click **Microsoft Office Project Server 2007 Accounts**.
2. In the **Project Server Accounts** dialog box, click **Add**.
3. In the **Account Properties** dialog box, and complete the following settings and click **ok**.

**Table 4.1**   PLACEHOLDER

Setting	Perform the following:
Account Name	Type Project   Server
Project Server URL	Type http://epm/pwa
When connecting	Select <b>Use Windows user account</b>
Set as default account	Select check box

---

**Create New Calendar**

---



---

## Calendar Options

---

The Calendar options work hand in hand with the project calendar to determine how tasks will be scheduled. It is imperative that the calendar options match the project calendar to create a consistency in the scheduling values for tasks and assignment values.

To access the Calendar options:  
Click **File → Options → Schedule**

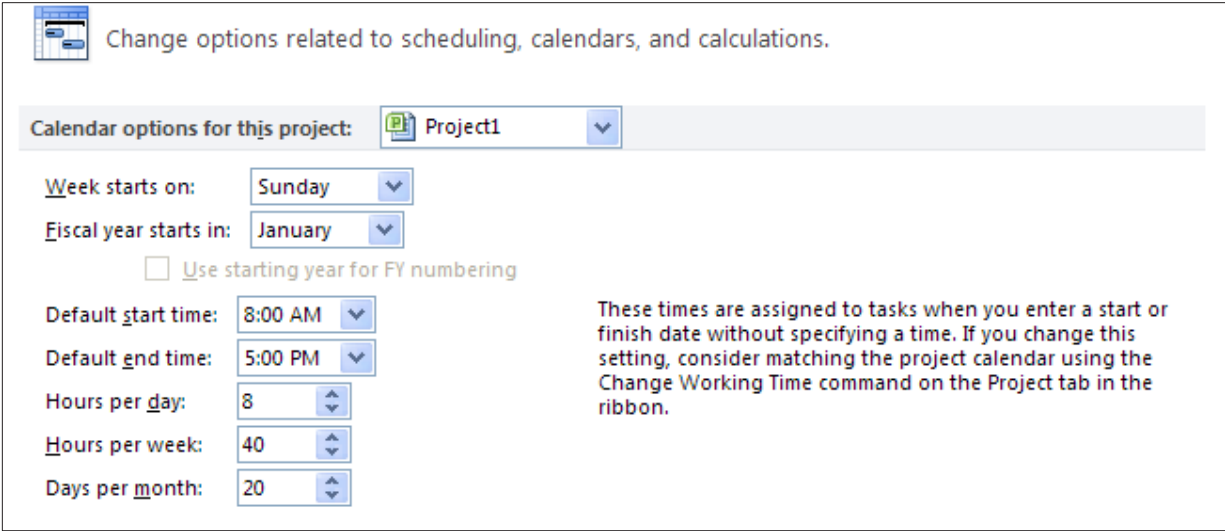


Figure 4-20   **PLACEHOLDER**

What the options mean:

- **Calendar options for this project:** option to select whether your option choices for the calendar will be held within an individual project or if they will be applied to all new projects.
- **Week starts on:** this choice will affect what is assigned and viewed as the first day of the week. The day chosen will be reflected on the Gantt Chart, Resource Usage, Task Usage and other calendar views.
- **Fiscal Year starts in:** if using this option, select which month will be the start of the fiscal year.
- **Default start and end times:** these values should match the time values on the project calendar. Assigning the project calendar will be discussed in the next lesson. The times stated here will be used to schedule tasks when

time is not specified for a task. It will also be used to schedule tasks that do not use relationships. For example: if recurring tasks are created, the tasks will always be scheduled at the start time represented in this option.

- **Hours per day:** when 1 day of work is scheduled, how many hours should 1 day consist of?
- **Hours per week:** when 1 week of work is scheduled, how many hours should 1 week consist of?
- **Days per month:** when 1 month of work is scheduled, how many days should 1 month consist of?

---

## Project Information

---

The final project information that should be entered before proceeding with project schedule development is the project start or project finish date as well as indicating which calendar will be used as the project calendar. This information is entered through the Project Information box.

To navigate to the Project Information dialogue box:

**Click** Project → Project Information

Deciding whether to enter the Project Start date or the Project Finish date will take some consideration. There are pros and cons to either choice:

**FAQ:** Should I enter a project start and finish date?

**Answer:** Project 2010 will accept either the start or the finish date but not both.

Entering a start date will indicate that you are planning your schedule as forward scheduling. This will result in:

- All tasks will be scheduled As soon as possible
- The work of the project will determine the project ending date
- You will have a date to manage to and know when you are on time or late with the progress of the project

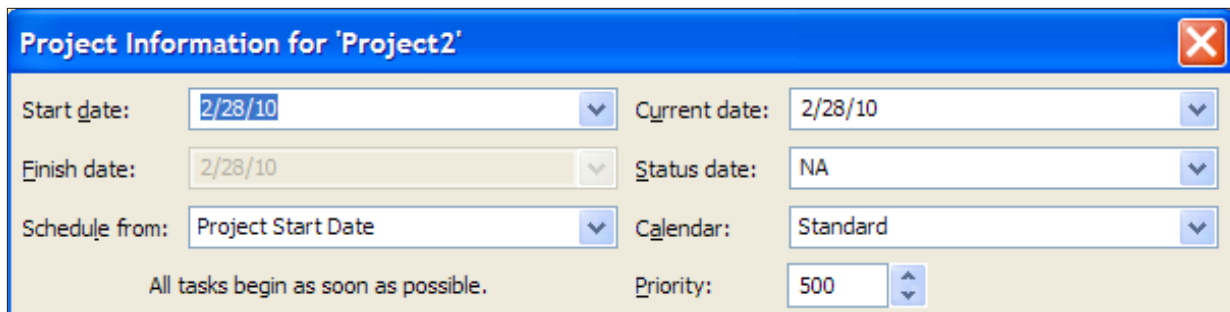
Entering a finish date will indicate that you are planning your schedule as backward scheduling. This will result in:

- All tasks will be scheduled As late as possible
- The ending date of the project will be locked to a date on the calendar
- You might be planning a project where each task will be required to be completed as planned to achieve the ending date goals.

The most used planning method is that projects are planned from the project start date.

**Project Calendar:** The default calendar is “Standard”. Whatever calendar is selected will become the scheduling calendar for the project. All tasks will be scheduled using this calendar until a resource is assigned to the task.

Click **OK** to close the box.



Project Information for 'Project2'

Start date: 2/28/10 Current date: 2/28/10

Finish date: 2/28/10 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Figure 4-21 PLACEHOLDER



Most project managers have definite deadlines. Consider planning the schedule from ending date to get the schedule short term goals, deadlines and milestone dates. Then switch the project to the start date to manage. Reset the constraints to as soon as possible to enable the schedule to include slack and aid in schedule management.

## Plan from Start

## Plan from Finish

## **Project Start Date**

---

## **Assign Project Calendar**

---

---

## Options

---

### General Per Project

---

General options are options which affect how the installation of Project 2010 on a desktop will operate. Display options are options that will help the user interface with Project 2010 software. The options selected are unique to each user and are a personal preference. These options do not have an influence on the ability to create a project schedule.

To navigate to General options:

Click **File** → **Options** → **General**

In the Project view section, the user may select the default view for usage of Project 2010 and the date format for dates for reports and views (tables).

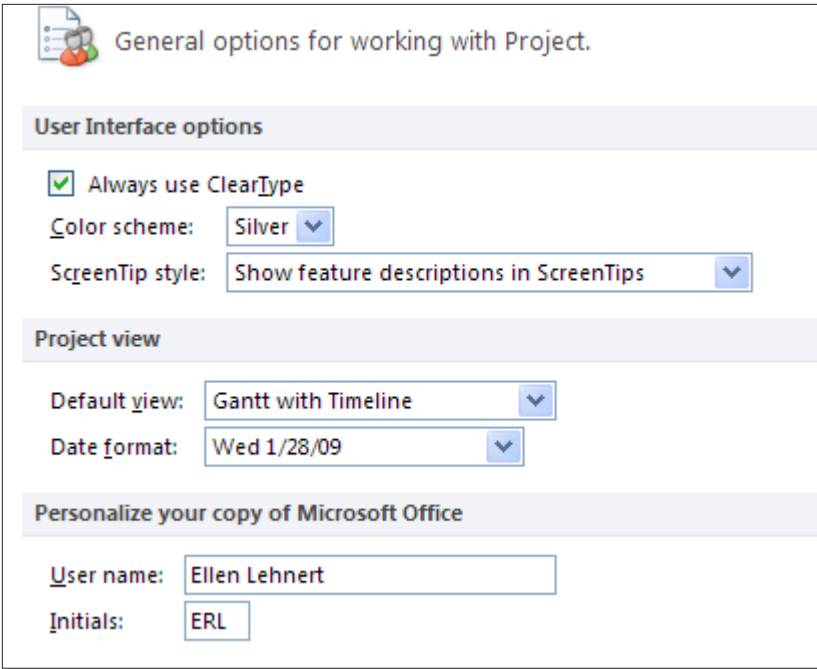



Figure 4-22    PLACEHOLDER


To navigate to Display options:  
Click **File → Options → Display**

These options refer to which elements should be viewed on the screen. These options will control which indicators are shown in the indicator column, currency values and if the Entry bar is visible or not.

 Change how Project content is displayed on the screen.

**Calendar**

Calendar Type: Gregorian Calendar ▾

Currency options for this project:  Project1 ▾

Symbol: \$ Decimal digits: 2 ▴ ▾

Placement: \$1 ▾ Currency: USD ▾

**Show indicators and options buttons for:**

☒ Resource assignments ☒ Edits to work, units, or duration

☒ Edits to start and finish dates ☒ Deletions in the Name columns

**Show these elements:**

☒ Entry bar

Figure 4-23 PLACEHOLDER

Additional display options are available at:

Click **File → Options → Advanced**

Some of the options that should be considered are:

- **Show this number of recent documents** – optional number, list will show in the Recent tab in the backstage
- **Automatically add new views, tabs, filters and groups to the global** - recommended
- **Settings for duration label values** – Minutes, Days, etc. - may alter as needed
- **Show project summary task** – recommended



Display

Show this number of recent documents: 17

☒ Show scroll bars

☒ Show status bar

☒ Show QLE links indicators

☒ Show windows in Taskbar

☒ Show bars and shapes in Gantt views in 3-D

☒ Use internal IDs to match different-language or renamed Organizer items between projects

☒ Automatically add new views, tables, filters, and groups to the global

Display options for this project: Project1

Minutes: min

Weeks: wk

Hours: hr

Months: mon

Days: day

Years: yr

☒ Add space before label

☐ Show project summary task

☒ Underline hyperlinks

Hyperlink color:

Followed hyperlink color:

Figure 4-24 PLACEHOLDER



Each project schedule has the ability to contain a Project Summary task. The Project Summary task is a zero level task that will serve as a constant grand total for the project schedule. The setting in the above options may be used to turn on the project summary task or use the directions below.

To turn on the Project Summary task:

Click **Task → Gantt Chart**

Click **Format → Project Summary Task** (on the right side of the ribbon)

## **General: Change the Default View to Gantt Chart**

---

## **Display: Entry Bar**

---

## **Scheduling**

---

# Define Duration, Work, Task Types and Effort Driven

## Scenario 1: Entering a Constant Duration Value

Let’s say you would like to enter a duration value that remains constant regardless of the resources that are added or subtracted.

The recommended practice is to estimate the task by entering a duration value, set the task type to Fixed Duration and then assign the resources.

This will cause total work for the task to be calculated.


		Task Name ▾	Duration ▾	Type ▾	Effort Driven
1		Prepare Facilities	1 day?	Fixed Duration	No
2		Begin Registration	5 days	Fixed Duration	No
3					

Figure 4-25 Entry Table with Duration and Optional Fields



The Effort Driven option provides a shortcut to divide the total work for the task across the resources assigned. This is useful for organizations that track costs or track resource assignments in detail.



To follow this approach, insert the Type and Effort Driven columns in the Entry table of Gantt Chart view or display Task Entry view which provides these fields in the lower pane. For more information about modifying views, refer to [chapter 7, Using Views](#).

## Scenario 2: Entering a Constant Work Value

You also have the choice to enter a total work value for the task that remains constant regardless of the resources that are added or subtracted. This is also called effort-driven estimating.

The recommended practice is to estimate the task by entering a Work value, set the task type to Fixed Work, and then assign the resources.

This will cause total duration for the task to be calculated.


		Task Name ▾	Duration ▾	Work ▾
1		Prepare Facilities	1 day?	40 hrs
2				

Figure 4-26 Entry Table with Work Field



To follow this approach, insert the Work column in the Entry table of Gantt Chart view. This is where you will enter your total Work estimate.

Do not enter anything in the Duration field. The Type field is also needed and may be inserted as a column or displayed in Task Entry view.

For more information about modifying views, refer to [chapter 7, Using Views](#).

For a more detailed discussion of Task Types, refer to [chapter 17, Working with Resources and Task Types](#).

# Task Types, Effort-Driven

Scheduling options are per project options which establish the defaults how a project will be scheduled. These options are unique per project and should be checked before entering tasks into a project schedule. These options also may be changed at any time over the life of the project schedule.

To set the scheduling options:  
Click **File → Options → Schedule**

Schedule

☒ Show scheduling messages ⓘ

Show assignment units as a: 

Percentage ▾

Scheduling options for this project: 

Project1 ▾

New tasks created: 

Manually Scheduled ▾

Auto scheduled tasks scheduled on: 

Project Start Date ▾

Duration is entered in: 

Days ▾

Work is entered in: 

Hours ▾

Default task type: 

Fixed Units ▾

☐ New tasks are effort driven ⓘ

☒ Tasks will always honor their constraint dates ⓘ

☐ Autolink inserted or moved tasks ⓘ

☒ Show that scheduled tasks have estimated durations ⓘ

☒ Split in-progress tasks ⓘ

☒ New scheduled tasks have estimated durations

☒ Update Manually Scheduled tasks when editing links

☐ Keep task on nearest working day when changing to Automatically Scheduled mode

Schedule Alerts Options: 

Project1 ▾

☒ Show task schedule warnings

☐ Show task schedule suggestions

Figure 4-27 PLACEHOLDER

- **Show scheduling messages:** gives the scheduler error messages concerning scheduling inconsistencies and warnings.
- **Show assignment units as a:** options are percentage or decimal. This is user preference. It may be changed at any time without affecting the schedule.

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- **Scheduling options for this project:** options that can be assigned to a specific project or all projects.
- **New tasks created:** manually scheduled or automatically scheduled. This is the default value and may be adjusted per task.
  - **Manually scheduled:** tasks will be entered without a start or finish date and without task duration. All values are entered manually.
  - **Auto scheduled:** tasks will be entered with a default duration of 1 day and a start and finish date.
- **Auto scheduled tasks scheduled on:** project state date or current date. If you are managing a long project it might be easier to change this option for all new tasks to start on the current date.
- **Duration is entered in:** minutes, hours, days, weeks, months
- **Work is entered in:** minutes, hours, days, weeks, months
- **Default task type:** Fixed Units, Fixed Duration, or Fixed Work
- **New tasks are effort driven:** check for yes
- **Update Manually Scheduled tasks when updating links:** when tasks are manually scheduled should the project schedule successor tasks based on relationship links



It is a good idea within an organization to establish a standard for Duration and Work. When duration is discussed or appears on a report it will be easier for stakeholders to understand that duration always means hours or the value that works for the specific project. If you have a 3 year project, you probably will not be planning work at the hour level so weeks might be the duration standard.

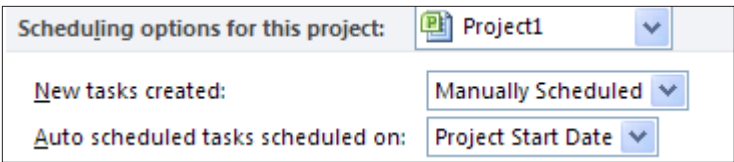
## Change to Auto Schedule

The column or field in Project 2010 that determines which scheduling mode a task will be scheduled by is called “Task Mode”. By default, you will see this field on the Entry table of the Gantt Chart. This column may be added to any task table.

Setting the automatic or manual scheduling mode may be accomplished in several ways:

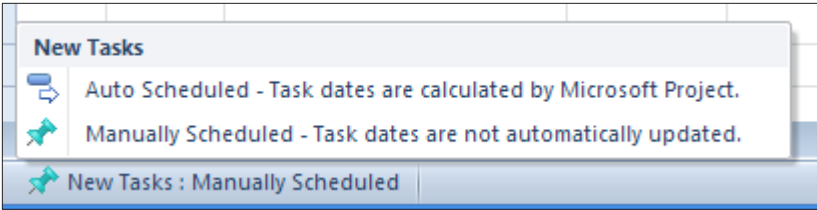
To set the scheduling mode for a project or for all future projects:

- **File → Options → Schedule**



**Figure 4-28**   PLACEHOLDER

After several tasks are entered you may decide to switch to a different scheduling mode for the addition of future tasks for the project. This can be done quickly using the choice option at the bottom left hand corner of the Gantt Chart view which is shown below. Changing this option will not affect existing tasks in the schedule; it will only affect future added tasks. Click on the button highlighted below for the option to change scheduling modes:



**Figure 4-29**   PLACEHOLDER

The default Entry Table for the Gantt Chart includes the “Task Mode” column inserted to the left of the Task Name column. This column may be inserted into any table as needed.. The indicators in this column indicate the scheduling mode for the task. In the view below the automatically scheduled tasks have a icon and the manually scheduled tasks have a icon in the Task Mode column. Hover your mouse pointer over the icon and the scheduling mode description will appear. Clicking on the icon will allow for scheduling mode changes per task. Note the different Gantt bar formats for manual v automatically scheduled tasks.

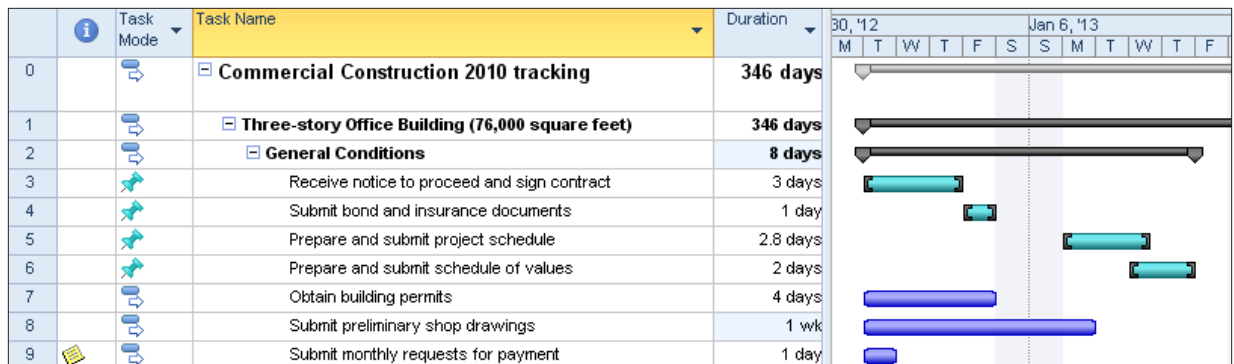


Figure 4-30 PLACEHOLDER

To change the scheduling mode from the Task ribbon:

- Click task to be changed
- Click **Task** → **Manual Schedule** or **Automatic Schedule**

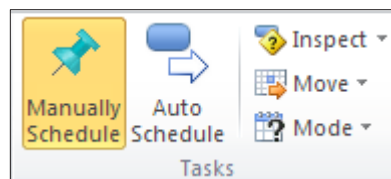


Figure 4-31 PLACEHOLDER

Another way to change the scheduling mode is to double clicking a task to open the Task Information dialogue box. An option is located on the General tab to change the scheduling mode. The options are highlighted in the view below.



Task Information

General

Predecessors

Resources

Advanced

Notes

Custom Fields

Name:

Submit shop drawings and order long lead items - steel

Duration:

2 wks

☐ Estimated

Percent complete:

0%

Priority:

500

☐ Inactive

Schedule Mode:

☐ Manually Scheduled

☒ Auto Scheduled

Dates

Start:

Fri 1/5/07

Finish:

Thu 1/18/07

☐ Display on Timeline

☐ Hide Bar

☐ Rollup

Help

OK

Cancel

Figure 4-32   PLACEHOLDER



## Chapter 5

# **Task Development**

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## Overview of WBS

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## Task Categories

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### What is a WBS?

Simple projects like grocery shopping might not need a plan to accomplish the project. When grocery shopping, most people will make of list of the items that need to purchase. Everything on the list is purchased and the project is completed. Not all projects are this simple.

Larger projects like building a house will require more planning and detail to accomplish the goals of the project. More tasks will be required, more detail and organization to the detail. More data will be accumulated regarding how the project was performed. To accomplish these types of projects, a work breakdown structure or wbs will be required.

The wbs is a hierachitcal structure much like an outline list. This structure will contain the work of the project. How it is organized will determine how effective and helpful the project schedule will be. Within the structure will be titles and well as details. The structure will also contain goal points or milestones to help manage target dates.

Consider the wbs of a project the same as the foundation for a building. Without a stable foundation the building will not be stable. Having a stable or well-planned wbs will be an asset to the performance of a project. Having an unstable wbs may adversely affect the management of the project schedule.

## Creating the Work Breakdown Structure

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Once the tasks of the project are established, the next step is to enter the tasks into the project schedule and create a wbs structure. Entering tasks may be a manual keying process or they may be imported from a SharePoint list (Project 2010 Pro only), an Excel workbook, an Outlook task list or a Word document. Tasks may also be copy and pasted into project schedules. This lesson addresses the manual entering of tasks into the project schedule.

In this lesson, we will discuss:

- Entering tasks
- The Task Information Form
- Outlining tasks into a wbs Hierarchy
- Displaying wbs code values
- Customizing wbs code numbers

## Entering Tasks

Entering tasks into Project 2010 is as easy as typing the task name into the Task Name field. When entering a new task, keep in mind that data is being populated in an array of fields for that row; several hundred fields will be created and some populated. After tasks are entered they may be moved, deleted, or copy/pasted to other areas of the schedule. It is also recommended that the Project Summary Task be turned on to aid in schedule development.

To turn on the Project Summary task:

- Click on **Format** → **Project Summary Task** (In the show/hide section on the right)
- Click the **check box** to turn on

To enter a new task:

- Click the **Task Name** field on the row you would like to enter and type the task name.

To move a task to another location in the schedule:

- Left Click on the task number (ID) in the left column. Hold the click down and wait for the 4 way arrow to appear and drag to the task to the new location. (Works well when the new location can be seen on the screen)

OR

- Click on the **task number** of the task you wish to move
- Click **copy** (or cut)
- Scroll to the new location
- Click **Paste** – Project 2010 will insert the pasted task



Entering blank lines to receive the moved tasks is not necessary. The schedule will insert the lines and move tasks down to accommodate the moved tasks.

To add blank lines schedule between existing tasks:

- Right click on the **task** below the location of the new task to be inserted
- Click **Task → Task** – a blank row will be created above the task selected

OR

- Click on a task
- Click **Insert** key on the keyboard

In the view below task 38 was entered using the Task → Task insert method. Note the default data and <New Task> name entered. Task 40 was the result of clicking the Insert key on the keyboard.

	i	Task Name	Start	Finish	Baseline Start	Baseline Finish	Start Var.	Finish Var.
36		Review modular code	5/8/13	5/15/13	4/18/13	4/24/13	14.75 days	14.75 days
37		Test component modules to product specifications	5/15/13	5/17/13	4/25/13	4/26/13	14.75 days	14.75 days
38		<New Task>	5/17/13	5/20/13	NA	NA	0 days	0 days
39		Identify anomalies to product specifications	5/20/13	5/23/13	4/29/13	5/1/13	15.75 days	15.75 days
40								
41		Modify code	5/23/13	5/28/13	5/2/13	5/6/13	15.75 days	15.75 days

Figure 5-1 PLACEHOLDER

To delete tasks from the schedule:

- Right click the task to be deleted
  - Click **Delete Task** option
- OR
- Click the task to be deleted
  - Click the **Delete** key on the keyboard



If you have clicked anywhere within the task row and deleted the task a Smart Tag will appear to ask if you want to clear the field or delete the task.

In the view below the result of clicking on the Smart Tag (the X with the down arrow) is shown. Make your selection from the choices in the box below.

62		Review Help documentation	5/14/13	5/17/13	4/23/13
63			5/17/13	5/21/13	4/26/13
64		Only clear the contents of Task Name Cell. ations	4/9/13	4/10/13	3/19/13
65		Delete the entire task.	4/23/13	5/14/13	4/2/13
66		Review all user documentation	5/14/13	5/16/13	4/23/13

Figure 5-2 PLACEHOLDER

Project 2010 has the ability to temporarily inactivate a task from the schedule. This is an alternative to deleting a task.



This option is only available in Project 2010 Professional.

The benefits of inactivating tasks as opposed to deleting tasks are:

- The task will remain in the schedule and could be reactivated if necessary
- The inactive task will not be considered by the scheduling engine.
- Relationships will stay in tack and should be removed which will be discussed in next Module 4.
- If a task was previously included in the baseline for the project, the data will stay in with the project
- If there is a question whether a task should be included it could be entered in an inactive state so it is not forgotten
- The inactive task has unique formatting to indicate that it is inactivated.

In the view below task 27 has been inactivated. Note the alternate formatting:

25		Development	62 days	1/14/13	4/9/13	
26		Review functional specificati	1 day	4/9/13	4/9/13	24
27		Identify modular/tiered- design parameters	5 days	1/14/13	1/18/13	
28		Assign development staff	1 day	1/14/13	1/14/13	

Figure 5-3 PLACEHOLDER

To inactivate tasks in the schedule:

- Click the task
- Click **Task ribbon → Inactivate** in the schedule section

To reactivate an inactivated task:

- Click the task
- Click **Task ribbon → Inactivate** in the schedule section



When tasks are entered you will note that the column to the left of the task name is a column called “Task Mode” This column will reflect the default task mode for scheduling of the tasks. By default the task mode is manual, with the other option being automatic. The status of this mode will make a difference in the appearance of the entered task. This is an option that is controlled either on a per task basis or as a preset option as a default of the schedule. We will discuss this new Project 2010 scheduling option in Module 4.

## Task Information Form

The Task Information box is a source of easy access for some of the frequently used fields on the task side of the data for a Project 2010 project schedule. Data entered in the form is the same as entering data into a column in a table for a task. Using this box is a quick and easy way to view and maintain task information.

To access the Task Information Form:

- Double click an **task data** field within a task
- OR
- Click on a **task**
- **Task ribbon → Information**

The form below will appear:

**Task Information**

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name: Calculate moving expenses Duration: 1 day ☐ Estimated

Percent complete: 0% Priority: 500

Schedule Mode: ☐ Manually Scheduled ☒ Auto Scheduled ☐ Inactive

Dates

Start: 3/2/12 Finish: 3/2/12

☐ Display on Timeline  
☐ Hide Bar  
☐ Rollup

Help OK Cancel

Figure 5-4 PLACEHOLDER

The form contains several tabs of information, grouped by subject. Each tab will allow access to the Task name, Duration and Estimated flag.

**General tab:** contains Name, Duration, Percent complete, Priority, Schedule Mode, Inactive, Start and Finish dates, Display on Timeline, Hide Bar and Rollup.

**Predecessors:** contains information concerning task relationships.

**Resources:** contains information concerning resources assigned to the task.

**Advanced:** contains information concerning Deadlines, Constraints, Task Types, Task Calendars, Effort-driven flag, wbs number and Milestone flag for the task.

**Notes:** general notes area for the task

**Custom fields:** If task level custom fields (user-defined) were created for the project, they would be accumulated and accessible through this area.





Data may be changed in multiple tasks at the same time. Select the tasks to be changed and then click on the Information icon on the Task bar. The box that appears is called the Multiple Task Information box. Make the changes and click ok to update.

2		Determine project scope	3 days	1/21/13	1/25/13
3		Secure project sponsorship	7 days	1/25/13	2/5/13 2
4		Define preliminary resources	6.6 days	2/10/13	2/19/13 3
5		Secure core resources	5 days	1/21/13	1/29/13 2SS
6		Scope complete	0 days	2/19/13	2/19/13 5,4

Multiple Task Information

General

Predecessors

Resources

Advanced

Notes

Custom Fields

Name:

Duration:

☐ Estimated

Percent complete:

0%

Priority:

Schedule Mode:

☐ Manually Scheduled

☐ Auto Scheduled

☐ Inactive

Dates

Start:

Finish:

☐ Display on Timeline

☐ Hide Bar

☐ Rollup

Help

OK

Cancel

Figure 5-5 PLACEHOLDER

## Outlining Tasks into a Hierarchy

Once tasks are entered, the wbs outline structure may be created. To create the outline structure, tasks will be indented or outdented. These buttons are located on the Task ribbon in the schedule section and are the green arrows in the lower left corner. The indent button is pointing to the right. The outdent button is pointing to the left. See below:

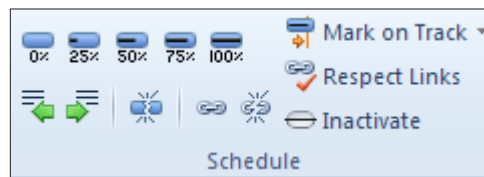


Figure 5-6 PLACEHOLDER

To indent a task:

- Click the task to be indented
- Click the **indent** (pointing right green arrow)

OR

- Place the mouse pointer over the task and a horizontal arrow will appear. Left click and drag the task to the right

To outdent a task or remove an indentation:

- Click the task to be outdented
- Click the **outdent** (left pointing green arrow)

OR

- Place the mouse pointer over the task and a horizontal arrow will appear. Left click and drag the task to the left

When a task has an indented task below it, the task becomes a summary task. Summary tasks are represented as black bars on the Gantt chart as shown below:

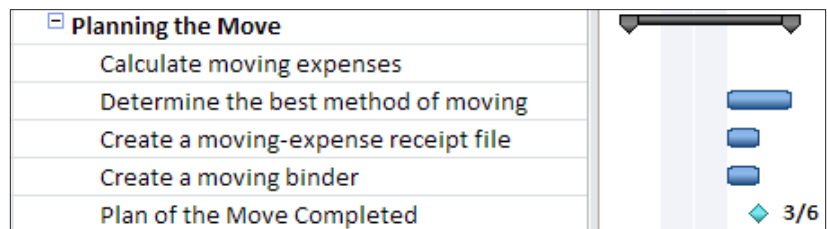


Figure 5-7 PLACEHOLDER

Indenting and outdenting can be confusing. At times it is difficult to achieve the desired structure results.



When indenting, work from the top down. When outdenting, work from the bottom up.

To see the levels of the wbs:  
Project Summary tasks and Summary Tasks will have a small box to the left of the summary task name as seen in the screen above.

- Click the **plus** sign + to expand tasks
  - Click the **minus** sign – to collapse tasks
- Use the Outline button to jump to a level of detail:  
Click on **View → Outline**:

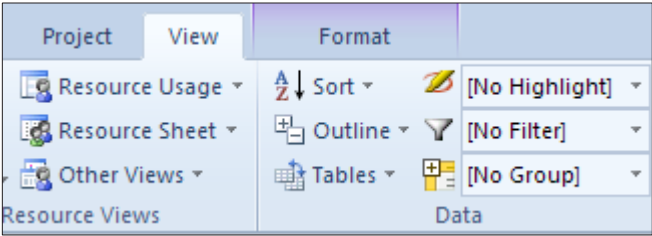


Figure 5-8 PLACEHOLDER

When the **Outline** down arrow is clicked, the following choices appear:

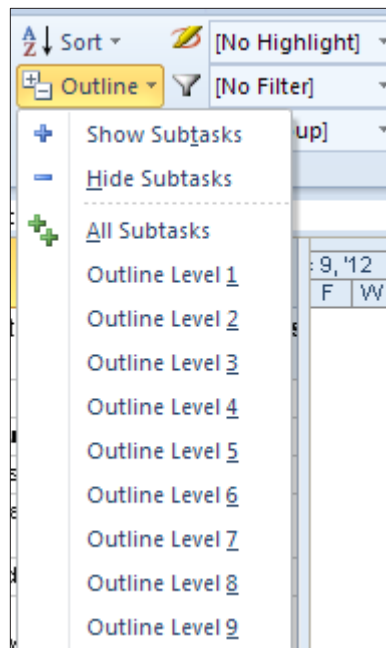


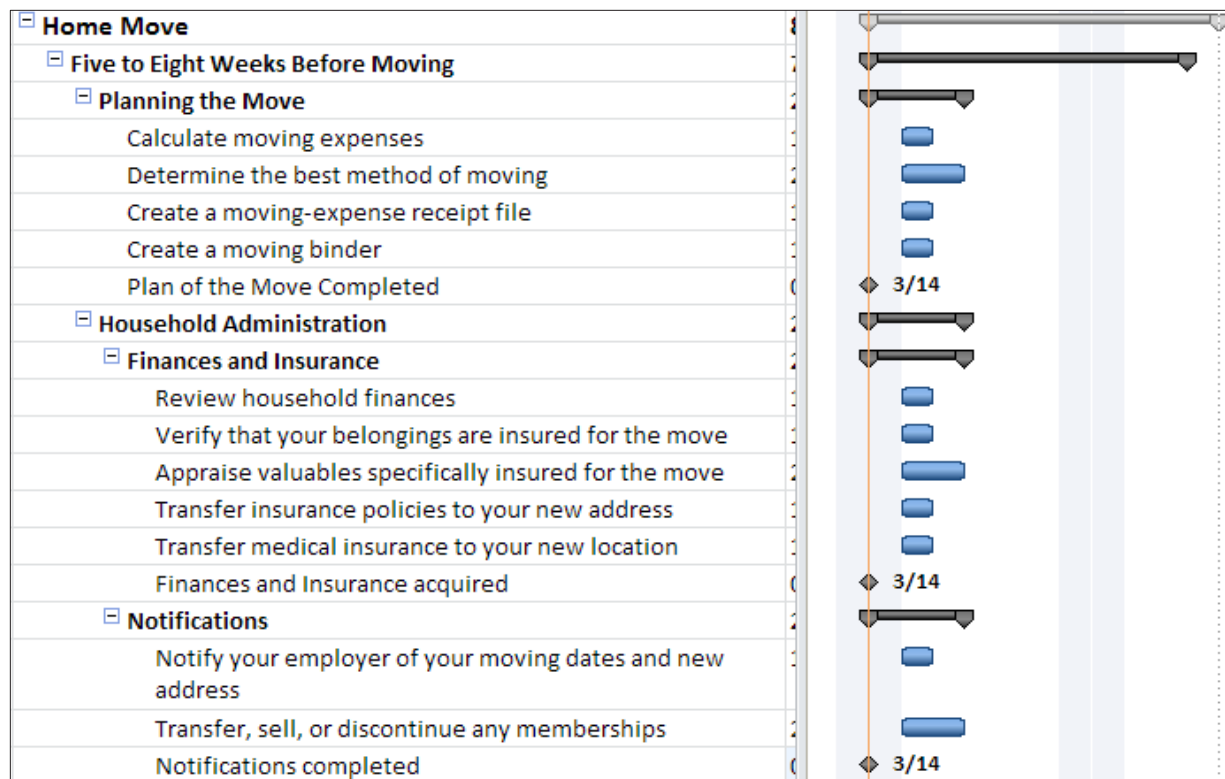
Figure 5-9 PLACEHOLDER

The following image shows a view of a collapsed wbs – **Outline level 1** was selected. Note the rolled up view of the tasks:



Figure 5-10 PLACEHOLDER

The following image shows a view of an expanded outline wbs – **All Subtasks** was selected:



Clicking **Project Summary** task and then **Hide Subtasks** will collapse the project down to just the Project Summary task.

If the outline is collapsed, clicking **All Subtasks** will show all tasks at all levels of the wbs.

The outline list offers the option to create up to 9 wbs levels. There are many more levels available in Project 2010 but it is advised that wbs levels should not exceed 5. The more wbs levels there, the more confusing and cumbersome a wbs may become.

## Displaying Outline Numbers & WBS

As the wbs structure is created, an automatic numbering sequence is also created within the task list. The numbers represent where in the wbs structure the tasks reside. This is a unique numbering scheme and numbers are automatically reassigned as tasks are moved around the wbs structure.

There are default number values and customized wbs number values. In

this lesson, we will address the standard wbs values; the following lesson will address the customized values available.

To view insert the wbs column into a table:

- In the Gantt chart view right click on a column heading. It is best to right click in the column to the right of where the new column should be inserted
- Select Insert Column
- Click the “W” key on the keyboard
- Select “wbs”
- Click ok

Below is an example of wbs numbering schema:

WBS	Task Name
<b>0</b>	<b>Municipality of Springfield</b>
<b>1</b>	<b>Influent Screens</b>
1.1	Enter order
1.2	Set-up Progress Schedule
1.3	Engineer Set-up
1.4	Drafting
1.5	Deliver Progress Schedule
1.6	Deliver Shop Drawing Submittal
1.7	HDR Review time for Submittals
1.8	Approval of shop drawing submittal
1.9	Detail Drawings & Bill of Material
1.10	Procurement of Material
1.11	Fabrication
1.12	Transportation of Equipment
1.13	Deliver Equipment to Jobsite
<b>2</b>	<b>O &amp; M Manuals</b>
2.1	Create preliminary O & M Manuals
2.2	Deliver Preliminary O & M Manual
2.3	HDR Review of Preliminary O & M Manuals
2.4	Acceptance of Preliminary O & M Manuals
2.5	Create Final O & M manuals
2.6	Deliver Installation and Final O & M Manuals
<b>3</b>	<b>Completed</b>

Figure 5-11 PLACEHOLDER



Because automatic wbs numbers are updated as tasks are moved or added to the wbs, it is not recommended that these numbers be used as a task tracking number. If a task tracking number is desired, consider using the field called “Unique ID”. This field is the order, in which tasks were added to the schedule and they will always be unique and will not be duplicated within a schedule.

## Customizing WBS Codes

The user has the option of customizing wbs numbers using a **Code Mask** and values entered by the user. When this option is evoked, additional options to re-number the wbs, enforce value uniqueness and optionally generate wbsnumbers become available. The customized number values are helpful when managing multiple projects or if there is a need to reference numbers unique to a project schedule. They are also helpful if using templates that result in frequently used task names. These codes could indicate which tasks are members of which project schedules and where the tasks are located within the project schedule.

To customize the wbs numbers:

- Project → wbs button → Define

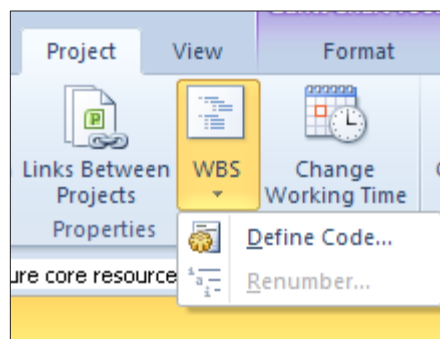
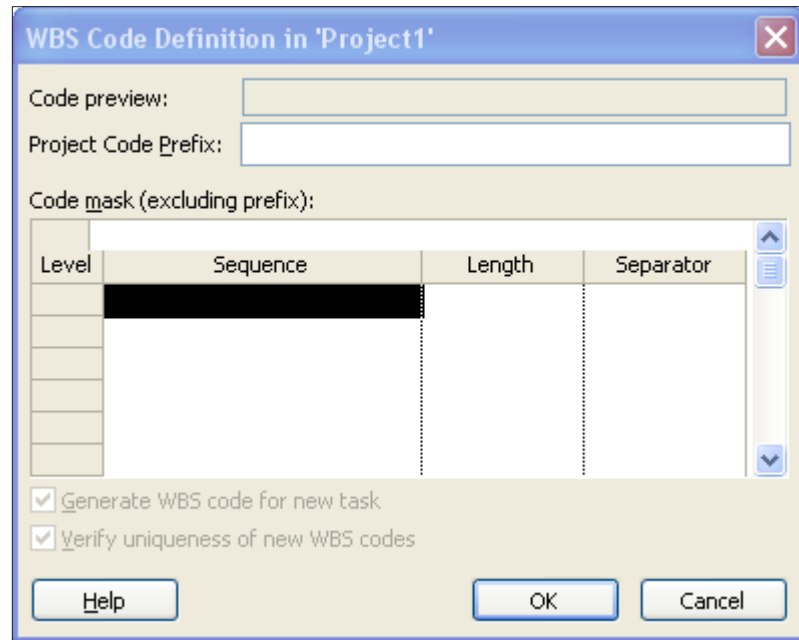


Figure 5-12 PLACEHOLDER

- **Project Code Prefix:** use this value to enter a code that will represent an abbreviation that applies to all wbs for the project schedule.
- **Sequence:** select the data type for the Code Mask to be created (ie: Numbers, Uppercase letters, lower case letters or numbers)
- **Length:** number of values for the length of the value

- **Separator:** Character symbol - . , - + or /



The dialog box titled "WBS Code Definition in 'Project1'" contains the following elements:

- Code preview:** An empty text box.
- Project Code Prefix:** An empty text box.
- Code mask (excluding prefix):** A table with 4 columns: Level, Sequence, Length, and Separator. The first row is highlighted in black.
- ☒ Generate WBS code for new task
- ☒ Verify uniqueness of new WBS codes
- Buttons:** Help, OK, and Cancel.

Level	Sequence	Length	Separator

**Figure 5-13** PLACEHOLDER

Select as many lines as necessary to create your "Code Mask" and click **OK**

Below is an example of a customized mask for wbs codes:



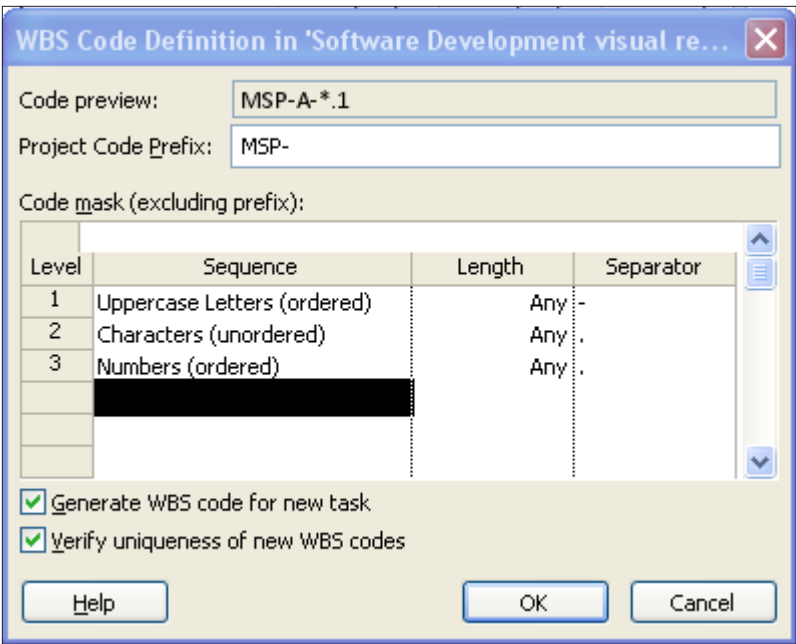


Figure 5-14 PLACEHOLDER

Below is the result of the customized wbs values:

	<div><div></div><div>WBS</div></div>	Task Name	Start	Finish	Baseline Star
0	MSP-	Software Development visual reports	1/16/13	7/5/13	1/1
1	MSP-A	Scope	1/21/13	2/19/13	1/1
2	MSP-A-1	Determine project scope	1/21/13	1/25/13	1/1
3	MSP-A-2	Secure project sponsorship	1/25/13	2/5/13	1/2
4	MSP-A-3	Define preliminary resources	2/10/13	2/19/13	1/3
5	MSP-A-4	Secure core resources	1/21/13	1/29/13	1/1
6	MSP-A-5	Scope complete	2/19/13	2/19/13	2/
7	MSP-B	Analysis/Software Requirements	2/15/13	3/19/13	2/
8	MSP-B-1	Conduct needs analysis	2/15/13	2/28/13	2/
9	MSP-B-2	Draft preliminary software specifications	3/1/13	3/6/13	2/1
10	MSP-B-3	Develop preliminary budget	3/6/13	3/11/13	2/1
11	MSP-B-4	Review software specifications/budget	3/11/13	3/12/13	2/2

Figure 5-15 PLACEHOLDER

When a Code Mask is created, the options to Generate a new wbs for a new task and Verify uniqueness of new wbs codes become

available.

To renumber the tasks based on the mask values:

- Project → wbs → Renumber



Renumbering may be applied to selected tasks only or the entire project.

Be aware:

To remove a mask: delete lower level entries first and work upwards to higher levels.

After removing the mask, the wbs will not revert back to an unformatted state but will remain as the settings for the customized mask.



If wbs values are turned on as part of the task name the original non-formatted value appears and not the customized value. to turn on the wbs value as part of the task name:

From the Gantt Chart click: View → Outline number

The wbs numbers are shown below included with the task names:

	i	wbs	Task Name	Start	Finish	Baseline Start
0		<b>MSP-</b>	<b>Software Development visual reports</b>	<b>1/16/13</b>	<b>7/5/13</b>	<b>1/16/13</b>
1		<b>MSP-A</b>	<b>1 Scope</b>	<b>1/21/13</b>	<b>2/19/13</b>	<b>1/21/13</b>
2		MSP-A-1	1.1 Determine project scope	1/21/13	1/25/13	1/21/13
3		MSP-A-2	1.2 Secure project sponsorship	1/25/13	2/5/13	1/25/13
4		MSP-A-3	1.3 Define preliminary resources	2/10/13	2/19/13	1/30/13
5		MSP-A-4	1.4 Secure core resources	1/21/13	1/29/13	1/21/13
6		MSP-A-5	1.5 Scope complete	2/19/13	2/19/13	2/19/13
7		<b>MSP-B</b>	<b>2 Analysis/Software Requirements</b>	<b>2/15/13</b>	<b>3/19/13</b>	<b>2/15/13</b>
8	✓	MSP-B-1	2.1 Conduct needs analysis	2/15/13	2/28/13	2/15/13
9	✓	MSP-B-2	2.2 Draft preliminary software specification	3/1/13	3/6/13	2/15/13
10	✓	MSP-B-3	2.3 Develop preliminary budget	3/6/13	3/11/13	2/15/13

Figure 5-16 PLACEHOLDER

## Best Practices and Standards

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By following some guidelines for creating your Work Breakdown Structure, you can achieve a more effective and manageable project schedule. A wbs's purpose is to help manage a project schedule. When created without guidelines, the project schedule is in danger of becoming another project.

Examples of a few real world project schedules that were not thought out very well:

- Consider a two-task project schedule for a 9-month project. Each task was 6 months long. The first task started on the first day of the project. The second task started during the third month of the project. The project manager could not understand why others could not manage their projects using this wbs. It was later discovered the details of the project were brought out at the weekly status meetings and only told to the team members when they needed to know them. The project manager wanted others to help manage their projects was reluctant to share the details. As a result the lack of communication had an adverse effect on the performance of all projects.
- A resource was tasked with migrating 1500 users from one email system to another. The project schedule contained 1500 tasks – one for each person who was to be migrated. When asked why each name was entered as a task the answer was that the scheduler wanted to know how long the entire project would take. The project schedule was more of a check list than a wbs. The more appropriate level would have been by department. Creating this type of schedule at a higher level would have made managing the work of the schedule more meaningful and easier to maintain.
- A PMO developed a template for their project managers to use while implementing their software packages within organizations that were their clients. Each project implementation took at least a year and each project manager managed 2 to 3 projects simultaneously. The template that was created contained 8500 tasks. The client was not using Project Server and the schedules would need to be updated and maintained manually by the project managers. The PMO created a lot of work for their project managers that would defeat the purpose they were trying to achieve of schedule management. The project schedule they created was a to-do for the projects.

To avoid some of the above problems and pitfalls, consider using some of the following guidelines:

- The wbs is not a to-do list. Are you managing tasks or are you managing a to-do checklist? Usually, tasks or deliverables are entered into the project schedule. Checklists of how to accomplish the tasks are kept in another location such as a Word Document, Excel Workbook or SharePoint list. Expect that all tasks will have checklists, supporting detail, resource requirements and activity lists outside of the project schedule. Very small lists may be kept in the notes area of the tasks.
- Identify deliverables within the wbs. Work from deliverable to deliverable in the development of the schedule.
- Arranging the tasks into summary areas can be a challenge. Imagine a deck of cards: can you arrange them by suit? By color? By number? The deck hasn't changed, just the order of the cards. There is no right or wrong answers. The answer is what will work best for you to use to manage your project.
- Break the deliverables into assignable work. If you are building a house, you might want a task called "Install Electrical" where Electricians can be assigned to the work. This would be a more appropriate level of detail than a task called "Install All Utilities" where Electricians, Plumbers, Carpenters, etc. will all be assigned. When the task is at too high a level, establishing the work, assignments, order and relationships between tasks becomes more difficult.
- Establish a standard design for each section of work. An example of this would be:
  - Summary Task
    - Detail task
    - Detail task
    - Detail task
    - Milestone task

Using this format will allow for creating high level reports (Milestone reports) easily as well as moving sections of deliverables around easily.

- Every summary task should have at least two subtasks. Tasks and milestones can be in the wbs without being part of a summary task grouping.
- Establish maximum and minimum lengths of duration for tasks. Create a rule of thumb based on the length of each project. For example: If you have a 6 month project no task should be less than 1 day and no task will be longer than 2 weeks.
- Decide if you will be creating a wbs in the rolling wave approach (develop the schedule phases as the project progresses) or a deliverable orientated schedule. The rolling wave type of schedule development is popular for schedules managing software development and other IT orientated

project schedules. It can be used for any project where all of the details of the project are not known at the beginning of the project. Alternatively, a deliverable orientated project schedule might have different organizations working on different sections of the project which all need to be completed at a specific point in time. For example: building heavy equipment. Each section of the machinery might be built by separate organizations, but all pieces must be ready for assembly by the same target date.

- Deliverables: Completing a section of work means that the deliverable of that section has been accepted. Create a task for the delivery of the deliverable and create a milestone to represent the acceptance of the deliverable. The two are rarely occur at the same time.
- Level of detail. Project 2010 will allow for a maximum of 99 levels of wbs details. Best practices for level of detail is to develop schedules at five or less levels. If a wbs were built 20 levels deep, this would mean the project manager would have to dig through 20 levels of titles before uncovering the work of the project.
- If too much detail is put into the project schedule, the schedule will become a project unto itself. In the third example above, the wbs was a check list and not based on tasks to manage. Schedules will be tracked and tasks will change over the course of the project all of which will require the project manager's attention. The more tasks, the more work.
- Use the wbs to help manage the scope of your project. If the task isn't in the project, consider it out of scope. When you enter tasks into the project schedule, ask yourself if the task is necessary.
- When planning the wbs think about just the work of the project. Many project managers like to start thinking about who will do the work and when. It is a good idea to focus on the work of the project only and think of the work as the "what" of the project. The "who" and "when" will come as the project schedule develops.
- Having the project team or the top level resources help build the wbs for a project is a win-win for the project:
  - Increases resource buy in
  - Encourages resource contribution
  - Many eyes looking at problems from different angles
  - Less probability of missing tasks
  - Encourages team building

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## Enter Tasks

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## Project Summary Task

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## Milestones

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A milestone is a check point in your project. It is a status, not a task which means that it has no duration and no resources are needed. For example, an approval or sign-off before the project can proceed and the completion of a stage of the project are both milestones. To Project, a milestone is a task with a zero duration.

To enter a milestone, use the following steps:

1. Insert a new task, or click the Task Name of a blank task.
2. Type the name for the milestone in the **Task Name** field and press the **Tab** key.
3. Type "0" in the Duration field, and press the **Enter** key.

Milestones are denoted in the Gantt Chart as a diamond symbol, rather than a bar (since the milestone has no duration).

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## Indenting

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### Type in Tasks

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Entering tasks into Project 2010 is as easy as typing the task name into the Task Name field. When entering a new task, keep in mind that data is being populated in an array of fields for that row; several hundred fields will be created and some populated. After tasks are entered they may be moved, deleted, or copy/pasted to other areas of the schedule. It is also recommended that the Project Summary Task be turned on to aid in schedule development.

To turn on the Project Summary task:

- Click on **Format → Project Summary Task** (In the show/hide section on the right)

- Click the **check box** to turn on

To enter a new task:

- Click the **Task Name** field on the row you would like to enter and type the task name.

To move a task to another location in the schedule:

- Left Click on the task number (ID) in the left column. Hold the click down and wait for the 4 way arrow to appear and drag to the task to the new location. (Works well when the new location can be seen on the screen)

OR

- Click on the **task number** of the task you wish to move
- Click **copy** (or cut)
- Scroll to the new location
- Click **Paste** – Project 2010 will insert the pasted task



Entering blank lines to receive the moved tasks is not necessary. The schedule will insert the lines and move tasks down to accommodate the moved tasks.

To add blank lines schedule between existing tasks:

- Right click on the **task** below the location of the new task to be inserted
- Click **Task → Task** – a blank row will be created above the task selected

OR

- Click on a task
- Click **Insert** key on the keyboard

In the view below task 38 was entered using the Task → Task insert method. Note the default data and <New Task> name entered. Task 40 was the result of clicking the Insert key on the keyboard.


		Task Name	Start	Finish	Baseline Start	Baseline Finish	Start Var.	Finish Var.
36		Review modular code	5/8/13	5/15/13	4/18/13	4/24/13	14.75 days	14.75 days
37		Test component modules to product specifications	5/15/13	5/17/13	4/25/13	4/26/13	14.75 days	14.75 days
38		<New Task>	5/17/13	5/20/13	NA	NA	0 days	0 days
39		Identify anomalies to product specifications	5/20/13	5/23/13	4/29/13	5/1/13	15.75 days	15.75 days
40								
41		Modify code	5/23/13	5/28/13	5/2/13	5/6/13	15.75 days	15.75 days

Figure 5-17 PLACEHOLDER

To delete tasks from the schedule:

- Right click the task to be deleted
- Click **Delete Task** option

OR

- Click the task to be deleted
- Click the **Delete** key on the keyboard



If you have clicked anywhere within the task row and deleted the task a Smart Tag will appear to ask if you want to clear the field or delete the task.

In the view below the result of clicking on the Smart Tag (the X with the down arrow) is shown. Make your selection from the choices in the box below.



62		Review Help documentation	5/14/13	5/17/13	4/23/13
63			5/17/13	5/21/13	4/26/13
64		Only clear the contents of Task Name Cell.	4/9/13	4/10/13	3/19/13
65		Delete the entire task.	4/23/13	5/14/13	4/2/13
66		Review all user documentation	5/14/13	5/16/13	4/23/13

Figure 5-18 PLACEHOLDER

Project 2010 has the ability to temporarily inactivate a task from the schedule. This is an alternative to deleting a task.



This option is only available in Project 2010 Professional.

The benefits of inactivating tasks as opposed to deleting tasks are:

- The task will remain in the schedule and could be reactivated if necessary
- The inactive task will not be considered by the scheduling engine.
- Relationships will stay in tack and should be removed which will be discussed in next Module 4.
- If a task was previously included in the baseline for the project, the data will stay in with the project
- If there is a question whether a task should be included it could be entered in an inactive state so it is not forgotten
- The inactive task has unique formatting to indicate that it is inactivated.

In the view below task 27 has been inactivated. Note the alternate formatting:

25		Development	62 days	1/14/13	4/9/13	
26		Review functional specificati	1 day	4/9/13	4/9/13	24
27		Identify modular/tiered design parameters	5 days	1/14/13	1/18/13	
28		Assign development staff	1 day	1/14/13	1/14/13	

Figure 5-19 PLACEHOLDER

To inactivate tasks in the schedule:

- Click the task
- Click **Task ribbon** → **Inactivate** in the schedule section

To reactivate an inactivated task:

- Click the task
- Click **Task ribbon** → **Inactivate** in the schedule section



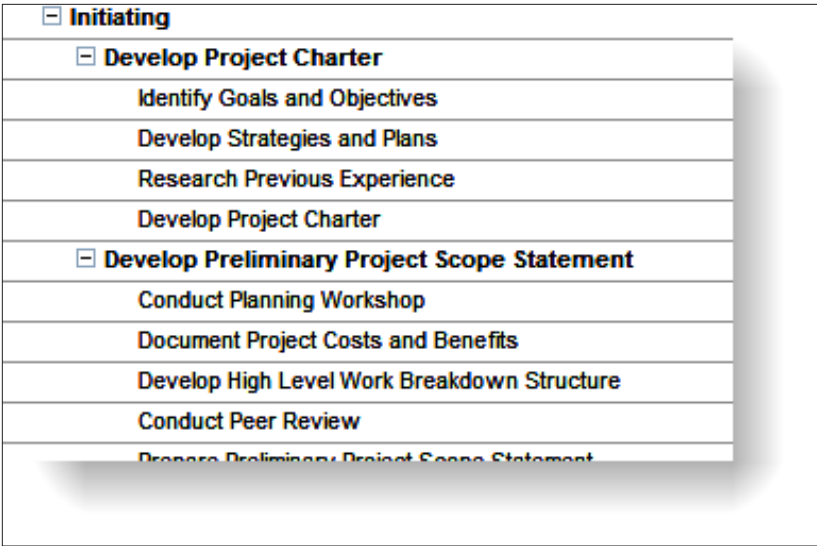
When tasks are entered you will note that the column to the left of the task name is a column called “Task Mode” This column will reflect the default task mode for scheduling of the tasks. By default the task mode is manual, with the other option being automatic. The status of this mode will make a difference in the appearance of the entered task. This is an option that is controlled either on a per task basis or as a preset option as a default of the schedule. We will discuss this new Project 2010 scheduling option in Module 4.

## Outline Levels

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The schedule is listed in a hierarchical format in the Entry table. This is a visual cue as to the grouping of tasks within the project. If you have a large project, you can group certain related tasks together under summary tasks to define the major phases of your project. For example, if you have five tasks in your project that are all related to writing, you can group them under a summary task called “Writing.” The tasks under a summary task are called subtasks.

Summary tasks appear in bold type, while the individual subtasks appear under the Summary task.



<input type="checkbox"/> <b>Initiating</b>
<input type="checkbox"/> <b>Develop Project Charter</b>
Identify Goals and Objectives
Develop Strategies and Plans
Research Previous Experience
Develop Project Charter
<input type="checkbox"/> <b>Develop Preliminary Project Scope Statement</b>
Conduct Planning Workshop
Document Project Costs and Benefits
Develop High Level Work Breakdown Structure
Conduct Peer Review
Prepare Preliminary Project Scope Statement

Figure 5-20 Task List

## Indenting and Outdenting Tasks

Indenting and outdenting tasks provides a way to create an effective outline structure. The outline format allows you to control the level of detail Project displays. You can display every task in your project, or you can display only the summary tasks. Project allows you to have multiple outline levels in your project, as you would in a complicated report or paper.

When you indent one or more tasks, Project demotes each of the selected tasks one level, converts the task immediately above the first selected task into a summary task, and changes the duration of the summary task to reflect the total (rolled up) duration of the subtasks.

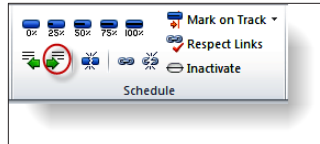
When you outdent one or more tasks, Project promotes the task one level.

As tasks are entered into the Entry table, the task will inherit the level of indenting of the previous task. Tasks can be indented or outdented as needed to create the level of hierarchy needed.

To indent a task:

4. Select a task in the Entry table.

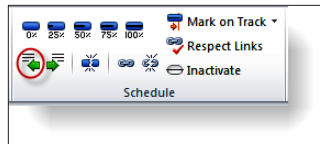
5. On the **Task** tab, **Schedule** group, click the green arrow pointing to the right. Repeat clicking the green arrow icon to continue to move the task to the desired indent level.



**Figure 5-21** Indenting a Task

To outdent a task:

1. Select a task in the Entry table.
2. On the **Task** tab, **Schedule** group, click the green arrow pointing to the left. Repeat clicking the green arrow icon to continue to move the task to the desired indent level.



**Figure 5-22** Outdenting a Task

## Collapsing and Expanding the Outline

One of the main benefits of outlining is that you can control the level of detail that Project displays. For example, if you want to inform upper management about the status of your project, they may not be interested in the daily tasks, only the major phases. You can collapse the outline to display only summary tasks, you can expand the outline to display all of the tasks, or you can display the subtasks for some summary tasks, but not for others.

The boxes containing plus (+) or minus (-) signs to the left of the summary tasks are called outline boxes. If an outline box contains a plus sign, it means that the summary task has subtasks under it and can be expanded. If an outline box contains a minus sign, it means that the sum-

mary task is expanded and can be collapsed.

To collapse the schedule outline:

- 1. Select the desired Summary task.
- 2. Click the minus (-) sign icon to the left of the Summary task.

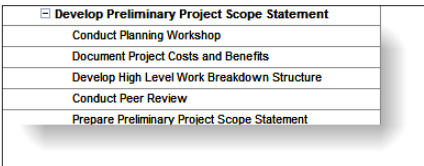


Figure 5-23 Minimize a Summary Task

To expand the schedule outline:

- 1. Select the desired Summary task.
- 2. Click the plus (+) sign icon to the left of the Summary task.

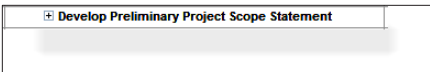


Figure 5-24 Expand a Summary Task

Project provides a Ribbon icon to quickly change the indent level viewing for the schedule. This action will apply the outline level to the complete schedule.

To view different outline levels:

- In the **View** tab, **Data** group, click the **Outline** dropdown arrow and select the desired outline level to view.

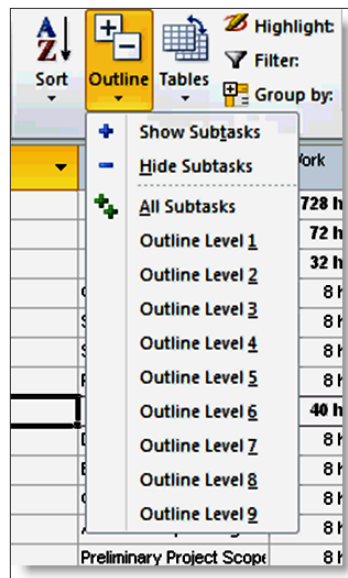


Figure 5-25 Outline Dropdown Menu

## Moving and Copying Tasks

If you want to create a task that is similar to an existing task, you can copy the existing task and then modify the copy. If you copy a task either from or into a list of tasks linked with Finish to Start relationships, Project inserts the task and adjusts the links so the original tasks remain sequential.

To copy a task:

1. Select the entire row of the task you want to copy by clicking on its ID field. If you only want to copy one field, such as the task name, select only that field.
2. In the **Task** Tab, **Clipboard** group, click **Copy**. Project copies the task to the Clipboard.
3. Select the task below the line the task will be inserted.
4. In the **Task** tab, **Clipboard** group, click **Paste**.



Keyboard shortcuts **Ctrl+C** (copy) and **Ctrl+V** (paste) will work as well.

You can also copy a single cell of data, rather than the entire task row.



Be aware that when you paste the contents of a single field, Project overwrites the contents of the field into which you paste. If you paste the single field into a blank row, Project creates a new task.

To move a task:

1. Click the ID number of the task to select the entire row.
2. Drag the entire task to the new location, between two existing tasks.

If you drag the contents of a single field to another field, Project overwrites the contents of the field.

If you move a task that is within a series of tasks that are linked sequentially, Project automatically adjusts the link relationships of the remaining tasks to reflect the new task order. Project does this only if the current task is linked to the task directly above and below. The moved task will maintain the original link to predecessors. Linking to a new series will need to be done manually.

## Copy, Delete, Edit, Insert, etc.

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## Move Around

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## WBS Code Field

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As the wbs structure is created, an automatic numbering sequence is also created within the task list. The numbers represent where in the wbs structure the tasks reside. This is a unique numbering scheme and numbers are automatically reassigned as tasks are moved around the wbs structure. There are default number values and customized wbs number values. In this lesson, we will address the standard wbs values; the following lesson will address the customized values available.

To view insert the wbs column into a table:

- In the Gantt chart view right click on a column heading. It is best to right click in the column to the right of where the new column should be inserted
- Select Insert Column
- Click the “W” key on the keyboard
- Select “wbs”
- Click ok

Below is an example of wbs numbering schema:



WBS	Task Name
<b>0</b>	<b>Municipality of Springfield</b>
<b>1</b>	<b>Influent Screens</b>
1.1	Enter order
1.2	Set-up Progress Schedule
1.3	Engineer Set-up
1.4	Drafting
1.5	Deliver Progress Schedule
1.6	Deliver Shop Drawing Submittal
1.7	HDR Review time for Submittals
1.8	Approval of shop drawing submittal
1.9	Detail Drawings & Bill of Material
1.10	Procurement of Material
1.11	Fabrication
1.12	Transportation of Equipment
1.13	Deliver Equipment to Jobsite
<b>2</b>	<b>O &amp; M Manuals</b>
2.1	Create preliminary O & M Manuals
2.2	Deliver Preliminary O & M Manual
2.3	HDR Review of Preliminary O & M Manuals
2.4	Acceptance of Preliminary O & M Manuals
2.5	Create Final O & M manuals
2.6	Deliver Installation and Final O & M Manuals
<b>3</b>	<b>Completed</b>

Figure 5-26 PLACEHOLDER



Because automatic wbs numbers are updated as tasks are moved or added to the wbs, it is not recommended that these numbers be used as a task tracking number. If a task tracking number is desired, consider using the field called "Unique id". This field is the order, in which tasks were added to the schedule and they will always be unique and will not be duplicated within a schedule.

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## Manual vs Automatic

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### Intro and the Basics

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Project 2010 provides two scheduling methods for creating project schedules. The methods are the traditional or automatic scheduling and manual scheduling.

### Traditional or automatic scheduling

This scheduling method was used in prior versions of ms Project and is contained in Project 2010. After tasks are entered relationships or dependencies are created between the tasks. The task durations with their relationships established the timeline for the schedule. This scheduling method allows for bottom up scheduling where the sum of the detail tasks establishes the time line for the project.

### Manual scheduling

Manual scheduling allows for top-down scheduling where summary tasks may be added first and the details of the project work is completed later. It also permits more unknowns during scheduling process and the ability to complete the details when known. Tasks do not have to contain relationships and scheduling dates may be entered.

Project scheduling mode will be selected on a task by task basis. Manually scheduled tasks and automatic scheduled tasks may be mixed within the same project schedule. Each task will contain a column called **task mode** which will establish the scheduling mode assigned to a task.

## When to Use Manual vs. Automatic Scheduling

Manual vs. automatic scheduling usage is a personal preference. The project manager's schedule management expectations, experience and goals will be included when deciding to use one method over the other. The amount of information concerning the project that is available to the scheduler when the schedule is created should also be taken into consideration. It may be advantageous to use both scheduling methods within a schedule switching between scheduling methods when needed.

Use Manual scheduling when:

- Minimal information is available about the project and you need to put your ideas into an initial schedule.
- Tasks are assigned to specific dates and you are not comfortable with the schedule moving as other tasks are entered or as resources are assigned.
- Using top-down planning – entering duration values for summary tasks followed by detail tasks and milestones to complete the work of the summary tasks.
- Using free form planning of tasks and durations to produce a Gantt chart.
- Need to build a rough schedule for a future project
- Relationships are not known.
- Manual scheduling is your most preferred method. Enter as many durations, relationships and dependencies as you need to help establish the timeline. This will help with critical path calculation as well.

Use Automatic scheduling when:

- More complete information is known about the goals of the project.
- Using bottom up planning. Enter the summary tasks names only. The detail tasks within the summaries will calculate the duration of the summary tasks.
- You want the schedule to be dynamic. Tasks will be re-scheduled based on work completed and associated dependencies. The scheduling engine will help keep you on track for the project and help you manage to an end date.
- You want the scheduling engine to calculate dates in the schedule.
- Resource allocations, earned value and more accurate metrics are needed.

Consider using a combination of both methods when:

- Initial planning could be in manual mode. As decisions are made and more detail is known, tasks may be converted to automatic mode.

- Consider converting to automatic mode when project execution begins. This may be done for the entire project, by phase or range of tasks.  
Project files from earlier Project versions:
  - When Project 2010 opens projects schedules created in earlier versions tasks will be locked in automatic mode and the mode can not be altered unless they are upgraded to a Project 2010 file.
  - Saving the file with a new name converts the file to a Project 2010 file and the automatic/manual mode option becomes available.
  - The Type Mode field might not be visible when opening projects of earlier versions. When attempting to insert the Task Mode column into a table, the column will not be available.

## Basic Discussion

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## **Project Live Cycle Approach**

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## Chapter 6

# **Constraints and Deadlines**

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## Constraints

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### What are Constraints?

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Constraints are defined as conditions upon which a project must be managed against which can negatively affect budget, quality, schedule and scope.

Some typical constraints might include a lack of:

- Money
- Skilled resources
- Requirements for the project
- Equipment
- Management support
- Time

Even though the above constraints are important to the success of a project, Project 2010 cannot account for these constraints. However, the constraints Project 2010 can help you with are dates.

Tasks may require a target date or start at a specific date, end at a specific date, or require scheduling at the beginning or ending of a timeframe.

Date constraints can be used to refine the project schedule when greater control is needed for specific tasks start or finish dates. Using date constraints, however, will also remove flexibility from the schedule. It is for this reason that the use of constraints be kept to a minimum. Some of the date constraints are more flexible than others available. The flexible constraints will be the most beneficial during scheduling.



Manual Scheduled tasks can not use constraints. They are used for Auto Scheduled tasks only.

## Constraint Types

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Constraints are used when a task must be scheduled with a specific date in mind or within a specific time period. When setting constraints, the following pieces of information must be known:

- Constraint type
- Date for the constraint

There are 8 constraint types available in the Project 2010 and all are date dependent:

1. **As Soon As Possible (ASAP)** - default constraint applied to all tasks when a project is scheduled from the project start date. Tasks will be scheduled as early as possible within a timeframe.
2. **As Late As Possible (ALAP)** - default constraint applied to tasks when a project is scheduled from the finish date of the project. Tasks will be scheduled as late as possible within a timeframe.
3. **Finish No Earlier Than (FNET)** - applied to a task that must finish no earlier than a specified date. The constraint date will be applied to the finish date of the task and the task will move forward in time to the date specified for this constraint.
4. **Finish No Later Than (FNLТ)** - applied to a task that must finish no later than a specified date. During tracking, tasks will move forward in the schedule. Tasks with Finish No Later Than constraints will move forward and stop at the constraint date.
5. **Start No Earlier Than (SNET)** - applied to a task that must start no earlier than a specified date. The constraint date will be applied to the start date of the task and the task will move forward in time to the date specified for this constraint.
6. **Start No Later Than (SNLT)** - applied to a task that must be started by a specified date. During tracking, tasks will move forward in the schedule. Tasks with a Start No Later Than constraints will move forward and stop at the constraint date.
7. **Must Start On** – applied when a task has a hard start date. The task will move to the constraint date and is fixed on that date.
8. **Must Finish On** - applied when a task has a hard finish date. The task will move to the constraint date and is fixed on that date.



## To Add a Task Constraint

### Method 1

1. Double-click any cell in the desired task row to launch Task Information.
2. Click the **Advanced** tab
3. In the **Constraint type** drop-down list, choose the desired constraint
4. In the **Constraint date** field, enter or choose the desired date (optional)
5. Click **ok**



If the planning wizard appears because you are creating a constraint on a task with a link to another task, you must select: **Continue. A xx constraint will be set.** Any of the other choices will alter or cancel the constraint type you selected.

## To Remove a Task Constraint

### Method 1

1. Double-click any cell in the desired task row to launch Task Information.
2. Click the **Advanced** tab
3. In the **Constraint type** drop-down list, choose **As Soon As Possible**
4. Click **ok**



The Constraint date will be automatically cleared.



As Soon As Possible is for schedules calculated from a Project Start Date.

### Method 2

1. Highlight cell with either the Start or Finish date
2. Press the **Delete** key



This method is typically used when you accidentally enter in the Start or Finish fields



~~Warning~~—If you do not have a predecessor link to a task and remove a constraint, the task simply moves to the start of the project and you may lose information related to the desired date for the task. Be sure to create the appropriate links first.

## Avoiding Accidental Constraints

The project manager creates constraints when entering a constraint type and date for a task. Constraints can be created in other ways as well, often accidentally.

The most common mistake made in Project is entering dates on auto-scheduled tasks directly in the Entry table portion of the view so that task constraints are created. Unnecessary constraints make it extremely difficult to manage project schedules, and track and update activities within your project.

Constraints on auto-scheduled tasks are set when you do any of the following:

- Enter or select from the date picker pop-up a Start Date directly in the Entry table.
- Enter or select from the date picker pop-up a Finish Date directly in the Entry table.
- Drag a Task Bar in the bar chart left or right.

By setting constraints, you effectively lock those tasks from moving in the future. As your project progress has an ebb and flow of activity that takes the timeline forward or backward, these tasks will remain unmoved and unmovable, and will tend to bring up error messages.



If a Start date is entered for an Automatically scheduled task, a **Start No Earlier Than** constraint will be applied to the task. If a finish date is entered a **Finish No Earlier Than** constraint will be applied.

When working with constraints you may be prompted with a Planning Wizard message. These messages are optional can be turned off individually or globally as desired.

# How to Disable the Planning Wizard Messages

## Method 1 – Disable an Individual Message

- 1. In the Planning Wizard dialog box that appears, click **Don't tell me about this again.**

## Method 2 – Disable All Messages

- 1. Click the **File** tab
- 2. Click **Options**
- 3. Click **Advanced** in the Project Options dialog box
- 4. Uncheck **Advice from Planning Wizard**



You can use this process to enable groups of messages that you individually disabled.

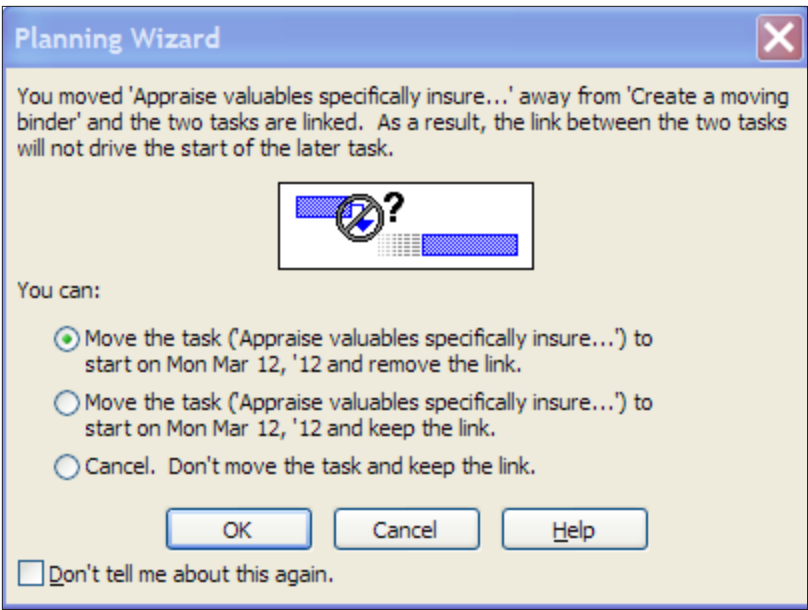
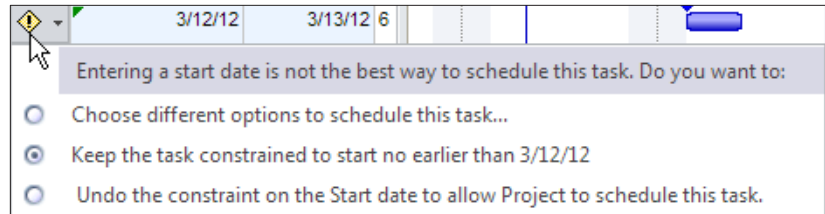


Figure 6-1 PLACEHOLDER



If Planning Wizard messages are turned off, you will not be alerted to possible scheduling errors that might be created as a result of creating a constraint or other scheduling issues.

You may also notice smart tags appearing in cells as you work with constraints. You may click the drop-down arrow next to the caution indicator to review available options.



**Figure 6-2** PLACEHOLDER



Selecting an option (even the suggested one by Microsoft Project) may alter your previously applied constraint.



If your scheduling style is to enter dates on each task, it is recommended that you use a manual scheduling approach instead of automatic scheduling. This will allow for tasks to be scheduled to the dates entered and will not be subject to the automatic scheduling engine of the software. If a task is scheduled using manual scheduling, the tasks can be changed to automatic scheduling at any time.



Constraints will also be entered as a result of the tracking process which will be discussed in a future module.

## Effects of Constraints

Constraints may cause errors in the scheduling of a project that are not readily apparent. Refer to the example below.

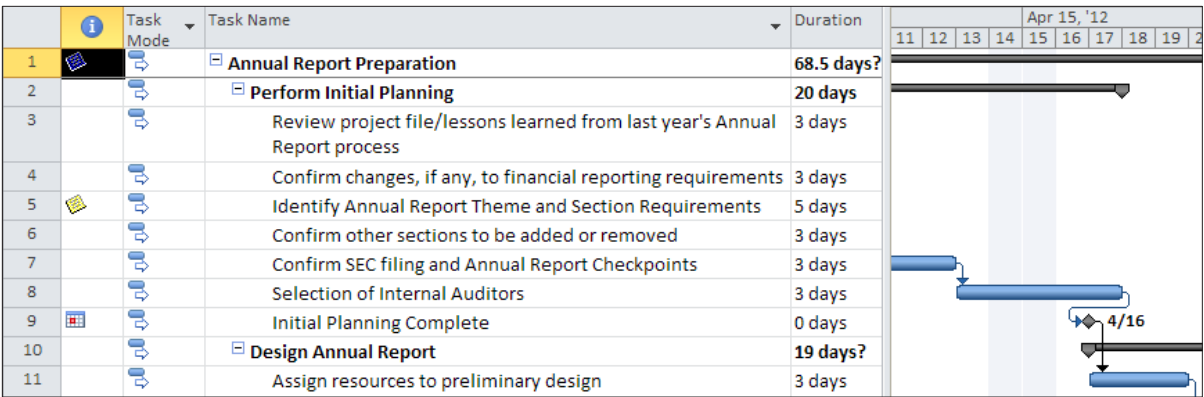


Figure 6-3 PLACEHOLDER

There is an error in the calculation of the date for the task 9 “Initial Planning Complete”. The relationship line after task 8, “Selection of Internal Auditors” flows backwards in time. The reason for this is that task 8 is scheduled to complete on April 17, one day later than the milestone target date of April 16. Tasks that are dependent on task 9 will also be miscalculated.



Monitoring for date calculation errors in your schedule is important.



Constraints should be used sparingly and the reason for a constraint should be document.



If you feel you must use constraints or enter start or finish dates for most of your tasks, manual scheduling might be your scheduling style.

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## Deadlines

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### Task Deadlines

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Deadlines represent a finish date goal or objective for a task. Using a deadline on a task will still allow it to flow with changes to the schedule and will not restrict its start or finish date like a constraint will.



Use deadlines over constraints to eliminate pop-up error messages when planning or executing your schedule.



A project manager should use deadlines to mark targets in the schedule and to provide simple visual cues when a deadline is missed.

To Set a Task Deadline:

1. Double-click any cell in the desired task row to launch Task Information.
2. Click the **Advanced** tab
3. In the **Deadline field**, choose or enter the desired date
4. Click **OK**

Task Information

General

Predecessors

Resources

Advanced

Notes

Custom Fields

Name:

Scope complete

Duration:

0 days

☐ Estimated

Constrain task

Deadline:

4/23/13

Constraint type:

As Soon As Possible

Constraint date:

NA

Task type:

Fixed Units

☒ Effort driven

Calendar:

None

☐ Scheduling ignores resource calendars

WBS code:

1.1.5

Earned value method:

% Complete

☒ Mark task as milestone

Help

OK

Cancel

Figure 6-4 PLACEHOLDER

Refer to the following scenarios to further understand deadlines.

A deadline of April 23, 2013 has been assigned to the “Scope Complete” task below. The deadline is represented by the green arrow on the Gantt Chart and does not appear in the Indicator column.

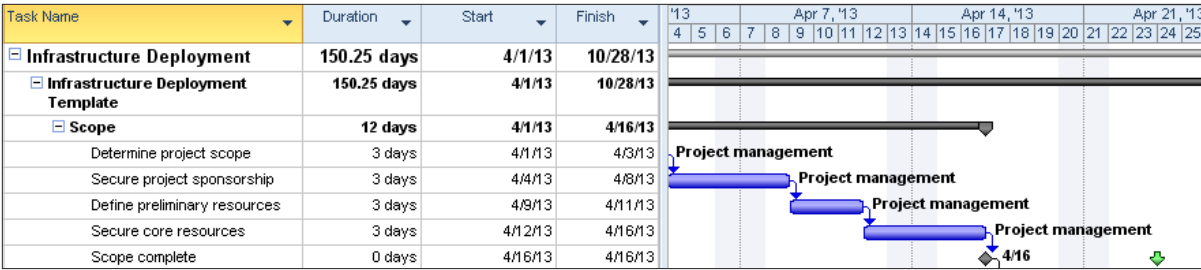


Figure 6-5 PLACEHOLDER

During project execution and tracking of the schedule, tasks will move forward in time. If a task with a deadline moves beyond the deadline arrow,

the task will be considered late. Below is an example of the warning that will appear in the Indicator column if a deadline is not met. Notice the red diamond in the indicator column explaining that the task date has exceeded the deadline date.

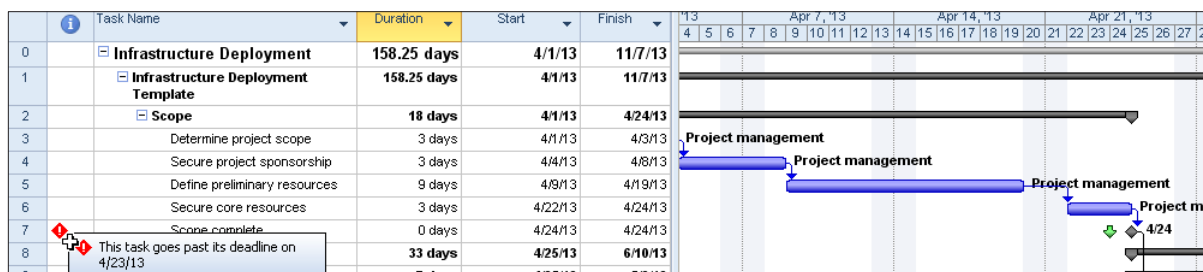


Figure 6-6 PLACEHOLDER

Another indicator to watch would be the Total Slack column. A negative value indicates that tasks are late and have missed or exceeded the deadline. The negative value indicates how many days the deadline was missed by. It is also an indicator of the amount of recovery time required to get the project back on track.



The Total Slack field provides information on auto scheduled tasks.

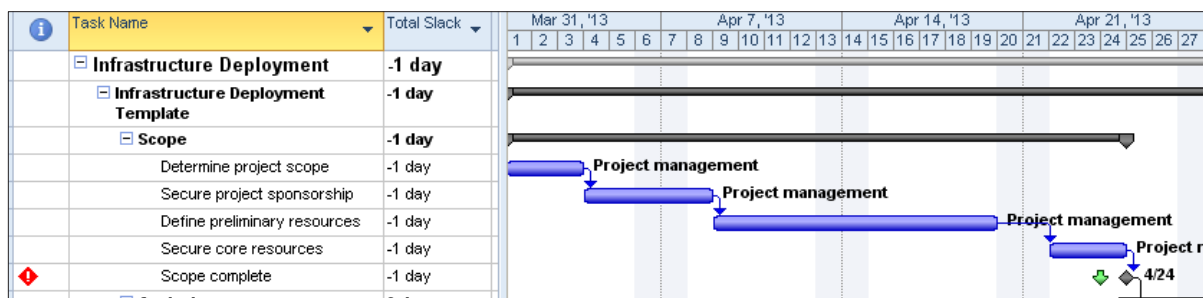


Figure 6-7 PLACEHOLDER

Unlike constraints, do not create date calculation errors in the schedule. Instead, they provide a visual indicator which flags you when deadline targets are missed.



Deadlines can be used in both manual or automatic scheduling mode.



To Remove a Task Deadline

1. Double-click any cell in the desired task row to launch Task Information.
2. Click the **Advanced** tab
3. In the **Deadline field**, select the date and press **Delete**
4. Click **OK**



Substitute deadlines for constraints when possible.



Place deadlines on milestones to help manage short term goals.  
As long as the deadlines stay on the left side of the milestones,  
you are doing well.



If a deadline date has been exceeded, check the Total Slack  
column or indicators column on auto scheduled tasks to see how  
much time needs to be made up to get back on schedule.

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## Split Tasks

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### Splitting Tasks

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There will be times during project scheduling that will require an interruption of work for a particular task. For example when planning a task, some of the work will occur on Monday and the remainder will occur on Monday the following week. In this situation two tasks could be entered or creating a split task would also work. Split tasks are designed for scheduling tasks that start then stop and start again.

When to use split tasks:

- When the work of a long task is required to work around other tasks. Some of the work would be done before a hard date and the remaining portion of the work would be scheduled after the hard date.
- Splits tasks may be used to help even out the resource work load
- 100% of the work for a task is not required to be performed without interruption and could be broken up over time.

To Split a Task

1. Click the Task tab
2. Click the Split Task icon
3. Position the mouse pointer in the middle of the Gantt bar for the desired task
4. Click and drag to the right until the desired split is achieved



**Figure 6-8** PLACEHOLDER

Refer to the following tips and guidelines regarding task splitting.



Repeat the above steps to create additional splits.



Both auto and manually scheduled tasks can be split.

- Hover the split task mouse pointer over the Gantt bar of the task to be split.  
The screen below will show the information box that will appear.
- As the mouse pointer is dragged the length of the Gantt bar, the date will change in the box. Clicking the mouse pointer will split the task and leave a gap between tasks.

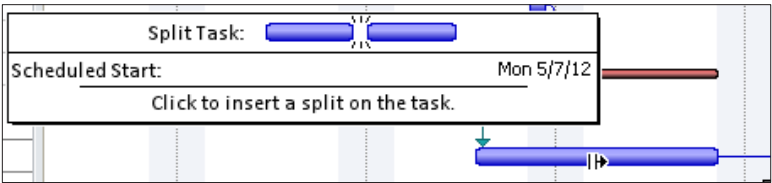


Figure 6-9 PLACEHOLDER

If the schedule has used “day” durations of tasks as the default scheduling increment, the gap in the split task will advance in 1 day increments or 1 week increments if “weeks” was used. A split task is shown in the view below.



Figure 6-10 PLACEHOLDER

The dots between the sections of the task are the split task indicators showing that the task has been split. The individual parts may be dragged back and forth as necessary to achieve timeframes that will work best for the task. Drag the pieces back together will eliminate the split status for the task.

To Unsplit a Task

1. Position the mouse pointer on the left side of a right most bar segment
2. Drag the segment to the left until it connects to the bar segment



Repeat the above steps to reconnect additional segments if needed.

There are a few rules, however that you should be aware of when working with split tasks:

- When a task is split, it is still one task and will be treated as such.
- Relationships will be applied to the beginning and ending of the entire split tasks only and not to the individual pieces. The individual parts are not separate tasks and cannot have discrete relationships.
- When resources are assigned, the work will be distributed over the total task duration and task as a whole.
- Constraints are applied to the start or the finish of the entire task and cannot be applied to the individual parts.
- The parts of the task may be dragged back together when needed.
- Tasks may be split multiple times.
- Splitting will refine the workload and the duration of the task.



Hiding bar splits will conceal separations of a task and may create confusion when the task duration does not match the Gantt bar length of the task.



Split bars will occur during the tracking process to represent a task which stopped and restarted or a period of inactivity.

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## Task Calendar

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### Applying Task Calendars

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There will be times when a task must occur within a unique timeframe and outside of the project calendar parameters. In order to accommodate such instances, users can create a distinctive calendar that can be assigned to a task. In doing so the task will be scheduled in the unique timeframe and not affect the scheduling of the entire project.

Below are some examples of when a task calendar would be used:

- Testing at a bank can only occur after the bank is closed 9pm to 6 am
- A weekend cut over of a software package or upgrade
- Testing of a product that requires a 24/7 test
- A task that must occur on second shift
- Task applied to an resource in an alternate time zone

The first step in using task calendars is creating the calendar using the same process described in **Module 2** to create a base calendar. After the calendar is created, it then may be applied to task. There is an option to ignore the resource calendars and allow the scheduling of the resources to be directed by the task calendar for the specific task only.

To Assign a Calendar to a Task

1. Double-click any cell in the desired task row to launch Task Information.
2. Click the **Advanced** tab
3. In the **Calendar** drop-down list, choose the desired calendar
4. If desired, click **Scheduling ignores resource calendars**
5. Click **ok**

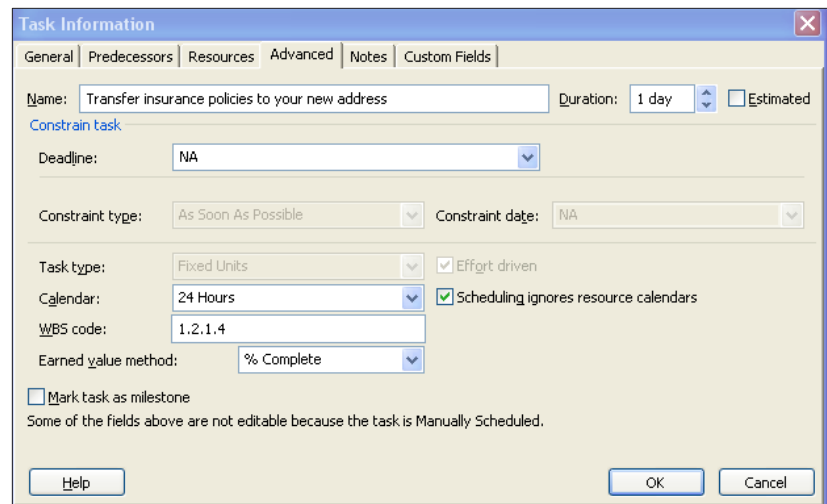


Figure 6-11 PLACEHOLDER

A visual indicator will appear in the Indicator column in the Gantt chart view.



Figure 6-12 PLACEHOLDER



Task calendars may only be applied to automatically scheduled tasks or manually scheduled tasks.

---

## Move Project

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### Moving the Entire Project Timeline

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Typically a project start date might change between the time the project is planned and the project actually starts. There are several methods available to change the project start date. It is important that the tasks are re-scheduled to adjust to the new start date.

The easiest way to change the project start date is use the Project Information box. Changing the start date using this method will move all tasks **without entered dates or constraints** to be rescheduled as of the new start date.

To Change the Project Start Date

1. Click the **Project** tab
2. Click **Project Information** in the Properties group
3. In the **Start date** field, enter or choose the desired new date
4. Click **ok**

**Project Information for 'Project2'**

Start date: 7/1/13 Current date: 7/12/10

Finish date: 7/8/13 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Enterprise Custom Fields

Department:

Custom Field Name	Value

Help Statistics... OK Cancel

**Figure 6-13** PLACEHOLDER

Changing the project start date will **not** reschedule tasks which have entered dates or constraints. Project 2010 provides a function called **Move Project** which will move **all** of the tasks to the new project start date. When tasks with constraints are moved using this function, the constraint dates will be adjusted based on the new project start date.

For example: if a task has a constraint 3 months from the start date of the project and the project start date is moved 6 months the constraint date will be re-scheduled 3 months from the new project start date.

The **Move Project** function also has an option to move project deadlines. If this option is not selected, the Deadlines will remain at the original dates and will need to be updated manually.

To the project start date and move tasks with dates to a new timeframe:



To Move a Project

1. Click the **Project** tab
2. Click **Move Project** in the Schedule group
3. In the **New project start date** field, enter or choose the desired new date
4. Click **Move deadlines**
5. Click **ok**

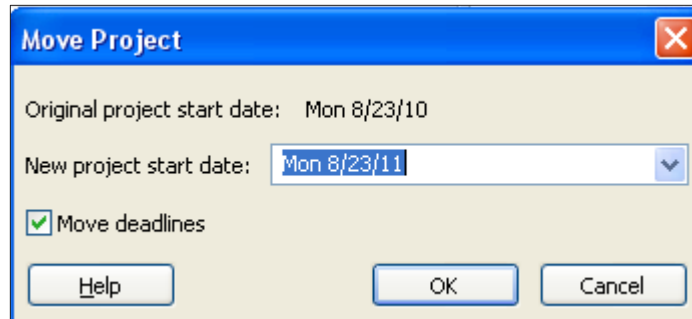


Figure 6-14 PLACEHOLDER



Any task that is not already linked in the schedule will move to the new start date that you enter using either of the methods above.



When you start a project as either a blank schedule or from a template, changing the project start date is recommended as a first step. If your project is fully planned out and has any type of task-related locked dates including deadlines or constraints, moving the project is recommended. This is especially useful when funding for a fully planned project has been delayed.

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## Task Notes

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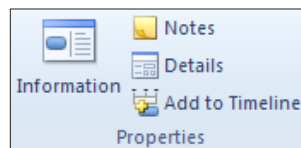
### Adding Notes to Tasks

---

Each task has a freeform notes field. The notes field may contain several types of information such as objects, hyperlinks, bulleted lists, etc. Notes may be printed on reports, exported to Excel and may be used as needed throughout the life of the project schedule.

To Add a Task Note

1. Method 1
  - a. Double-click any cell in the desired task row to launch Task Information.
  - b. Click the **Notes** tab
  - c. Enter the note
  - d. Click **OK**
2. Method 2
  - a. Select any cell in the desired task row
  - b. Click the **Task** tab
  - c. Click **Task Notes** in the Properties group
  - d. Enter the note
  - e. Click **OK**



**Figure 6-15** PLACEHOLDER

The notes view for a task is shown below:

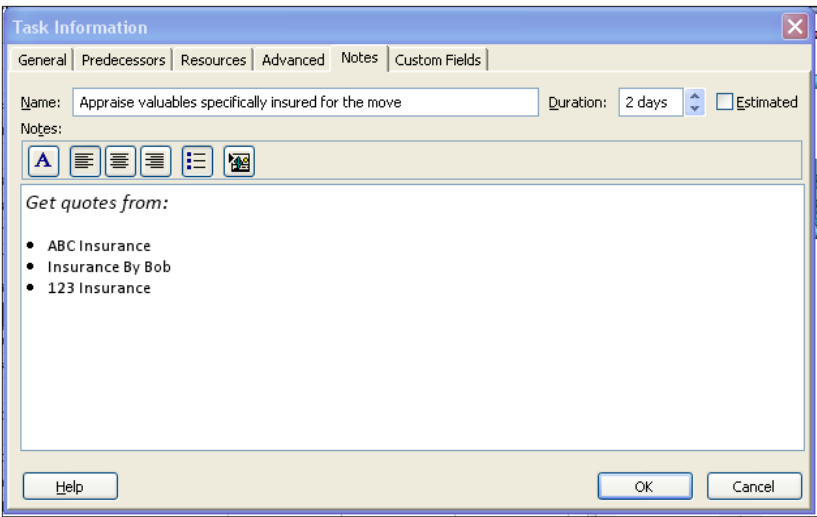


Figure 6-16 PLACEHOLDER

The Indicator column provides a visual indicator that a task note exists. Hovering the pointer over the icon will display the note preview to give the reader an idea of its content.

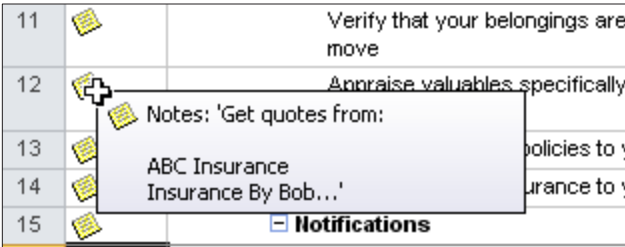


Figure 6-17 PLACEHOLDER

Notes can be invaluable and should be used during the planning and execution of the project. After the project is completed and a post-project review is conducted, task note information will help in recalling details of what occurred during the performance of tasks.



Lengthy task notes might be better suited for storage in an external document that is hyperlinked to your schedule.



## Chapter 7

# Resources

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## Work, Material, Cost: Resource Types

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Resources are an important part of a planned schedule. Project 2013 has the ability to offer multiple types of resources to help accomplish the work of a project. The different types of resources are intended to provide flexibility to address most types of resources required during the planning and management of a project.

In this chapter we will discuss the resource types and their intended use:

1. Work resources
2. Cost resources
3. Materials resources

## Work Resources

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Assigning work resources to a project will allow for resource requirement forecasting and project scheduling based on resource availability. Work resources are usually human resources but can also be facilities, equipment rental and other types of resources. Work resources are given an hourly rate. Resource costs can be forecasted using resource assignments to provide projected project budgets.

Effective uses of Work Resources are:

- Individual people – actual named resources
- Generic resources – these are job titles that can be used as placeholders to identify resources by skill type, skill level or if a resource is unknown. For example: DBA, Developer Level 1, Event Planner, Plumber
- Consolidated resources – used to state the quantity of a specific type of resource. For example: Helpdesk, Movers, Painters, Attendees, Members
- Facilities – a room or area that must be reserved for a period of time
- Contracted resources – external contracted labor
- Equipment – a machine that is priced by the hour

## Cost Resources

---

Cost Resources are defined as a type of cost that occurs one or more times during the project but has a variable amount. Use of Cost resources enables the scheduler to add estimated costs during the planning phase of the project and the ability to categorize these costs. These costs will be updated into the baseline. When actual costs become available during tracking, the actual costs will be updated and compared against the original estimates to provide a variance.

Cost resources will inherently increase the cost for a task and for the project. Cost resources have no effect on work or duration. The cost amount is applied to tasks as a flat amount at the time of assigning the cost resource to a task.

Effective uses of Cost resources are:

- Travel expenses estimated in advance
- Meal expenses estimated In advance
- Expenses for something used on the project that has a varying value each time it is used, such as a permit or license renewal



Project allows for as many cost resources as needed but for simplicity try to consolidate cost resources and keep them to a limited number. The type of reporting required for the project would drive the quantity of cost resources that will be needed.



If your project includes fixed price contracts and you would like to include those on the project, you may want to consider assigning the vendor as a cost resource to a task and entering the value of the contract. If it you do not need to incorporate the vendor name, you should probbly use the Fixed Cost field to record the value.

## Material Resources

---

Material resources are defined as consumables. For example: Reference books for a new product might cost \$50 each and 20 books are needed. A material resource would be created with a cost of \$50 per book. An assignment would be entered for a task for 20 books. As a result \$1,000 is added to the cost of the project. During tracking, the actual cost of the books purchased would be provided.

The cost of the material resources are added to the total cost of the project and updated into the project baseline. Material resources do not affect work or duration.

Effective uses of Material resources are:

- Construction: create a material resource for the cost of 1 foot of trim. Enter the number of feet required for the task
- Conference: create a material resource for the cost of giveaway bags. Enter the number of giveaway bags needed for the conference



If your project will be using a large quantity of materials such as a construction project, using Excel might be less work and a more effective means of keeping track of materials.



All resource and fixed costs are summed into the Cost field which becomes the planned budget for the project and is captured in the baseline cost.

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## Resource Sheet

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The Resource Sheet is where all resource records are stored. Work and material resources store their costs on the resource sheet; while cost resources have a unique cost added each time they are assigned to a task.




The quantity of a resource is determined when the resource is assigned to the task. For example, the number of hours a work resource will be needed comes from the task estimate. The number of units of a material resource is modified when the resource is assigned to the task. Normally a cost resource is always assigned at one unit on a task.

To display the Resource Sheet:

1. Click the **Task** tab
2. Click the drop-down arrow on **Gantt Chart** in the **View** group
3. Click **Resource Sheet**

The default table of the Resource Sheet is called the entry table which is shown below. This table is a subset of many of the resource fields of information that are available. This table represents the most common fields that are needed for a resource. More information is accessible through the Resource Information dialog box which will be discussed later in this chapter.

		Resource Name ▼	Type ▼	Material ▼	Initials ▼	Group ▼	Max. ▼	Std. Rate ▼	Ovt. Rate ▼	Cost/Use ▼	Accrue ▼	Base ▼

**Figure 7-1** PLACEHOLDER

To enter a resource, type the resource name in the “Resource Name” field. The Resource Name is the key field for the resource data.



Project does not allow commas in the resource name field.





Many reports and assignment views will display resources in alphabetical order. A standard of last name first name allows for easy location of resources while making assignments.

After the resource name is entered, several fields will be populated with default information.



Change the resource type before entering any information to enable/disable the appropriate fields on the resource sheet.

		Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar	Code
1		Smith Robert	Work		S			100%	\$0.00/hr	\$0.00/hr	\$0.00 Prorated	Standard	

Figure 7-2 PLACEHOLDER

Descriptions of the fields on the resource sheet are provided below:

**Type:** Work is the default and will establish the value entered in the resource name field as a work resource. Other values are material and cost and can be changed by clicking the drop down arrow and changing the type selection.

**Material:** Used for Material resources only – skip for work and cost resources.

**Initials:** If desired, enter initials for resources. Initials may be substituted on Gantt Charts or reports as needed to shorten reports.

**Group:** Group is an optional field which supports the entry of numbers and text. It is usually used for department, location or skill set. This information is used to generate reports by groupings of resources.



Organizations should set a standard for the use of this field to help schedulers work with different projects more effectively.

**Max units:** The Max units' value is an indicator of the quantity of a resource that is available. For work resources you should enter the value for the resource on the project. The default value is 100%. When entering a group resource such as the number of people on the Helpdesk, enter the number of resources in the group. Each resource represents 1 unit.

For example if there are 5 people on the Helpdesk, enter 500% in the Max Units column. For material resources, this field is unavailable since the assumption is you can purchase more materials, For cost resources, this field is also unavailable since you manually provide a cost, no calculation is needed with units. The value shown above is in the default percentage format but can also be viewed as a decimal value.



The default value for max units is a percentage format, but can also be displayed in a decimal format as desired.

**Standard rate:** Enter the desired rate for the resource that you want to have used in calculations.

**Overtime rate:** Enter an overtime rate for the resource. Keep in mind, it will affect only overtime hours entered.



If your overtime rate is a value calculated against the standard rate (e.g. time and 1/2), you need to figure out the calculation and enter the grand total in the overtime rate. Project with use the overtime rate value in place of the standard rate value not in addition to.

**Cost per use:** An extra value that may be added to a task over and above the Standard Rate for the resource. For example: A repairman is called to fix a refrigerator. The repairman charges a transportation charge, and hourly rate, plus parts. The cost per use is the transportation charge and would be applied to every task the repairman would be assigned to.

**Accrue at:** Cost accrual is an indicator of a point in time when costs are incurred. Cost accrual settings have 3 options: incur costs at the start of the task, incur costs at the end of the task, or incur costs throughout the task (prorated). Prorated accrual is the default option.

**Base calendar:** Each work resource will have a resource calendar associated with it. The resource calendar is based on calendars that have been previously established for the project. The Standard Calendar is the default resource Base Calendar. If the base calendar contains company non-working time it is not necessary to reestablish company holidays, statutory holidays, etc. as all of these will be applied to the resources. Use the dropdown list to select the appropriate calendar for a resource.

**Code:** This field is available for additional information about a resource

that you might want to track such as a cost center or department code.

The Resource Information dialog box is used to record information about a resource that is not captured in the Resource Sheet.

To view Resource Information dialog box:

- 1. Click the **Resource** tab
- 2. Click **Information** in the View group



An alternate method is to right-click the resource name and click Information. You can also double-click some empty white space next to a resource name to open the same dialog box.

Resource Information

GeneralCostsNotesCustom Fields

Resource name:Smith Robert

Initials:S

Email:

Group:

Windows Account...

Code:

Booking type:Committed

Type:Work

Material label:

Default Assignment Owner:

Generic

Budget

Inactive

Change Working Time ...

Resource Availability

NA	Available From	Available To	Units
	NA	NA	100%

Help

Details...

OK

Cancel

Figure 7-3 PLACEHOLDER

General tab data:

**Email:** optional

**Logon Account:** optional

**Booking Type, Default Assignment Owner, Inactive:** Project Server only

**Generic:** Optional. Select this option to indicate that the resource is a generic resource. A generic resource is a skill or role type resource to be used as a holding value until a human resource is assigned. When generic resources are used, the default base calendar is used for scheduling.

**Budget:** An attribute applied to a resource to limit it to project-level budgeted.



This feature will be discussed in the advanced materials.

**Resource availability:** Enter dates if the resource is only available for a particular period of time or has limited availability for a particular period of time. For example: An outside contractor is hired for a specific length of time. Enter the date ranges the resource will be available.

## Calendar

**Change Working Time** button:

Use this option to create a specific calendar exception for a resource. This could incorporate vacation time or alternate working hours.



This dialog box is identical to the one used to change project and base calendars discussed in an earlier chapter. The calendar displayed automatically includes the settings based on the calendar you selected for the resource base calendar. This saves time since corporate exceptions are already included. Changes to this calendar are made in the same way that changes were made to the project calendar.

Click **OK** to save changes and return to the Resource Information dialog box.

[illegible]

**Figure 7-4** PLACEHOLDER

Cost tab data:

This tab is reserved for recording increases to costs of resources.



Most organizations using costing experience periodic rate changes. The effective date allows early storage of future rate adjustments that become active based on a cut off date. If a project spans the cut off date, the tasks before the cut off date of the project will be costed at the earlier date rate and the remaining tasks which exceed the cut off date will contain increased rate. It is easy to see that if a project runs late, the cost of the project will increase when resource rates increase.

**Resource Information**

General **Costs** Notes Custom Fields

Resource Name:

[Cost rate tables](#)

For rates, enter a value or a percentage increase or decrease from the previous rate. For instance, if a resource's Per Use Cost is reduced by 20%, type -20%.

A (Default) B C D E

Effective Date	Standard Rate	Overtime Rate	Per Use Cost
--	\$0.00/h	\$0.00/h	\$0.00

Cost accrual:

Help Details... OK Cancel

Figure 7-5 PLACEHOLDER

Notes tab data:

Resource notes are treated the same as task notes within Project 2010. Resource note data has the same formatting and flexibility as task notes.

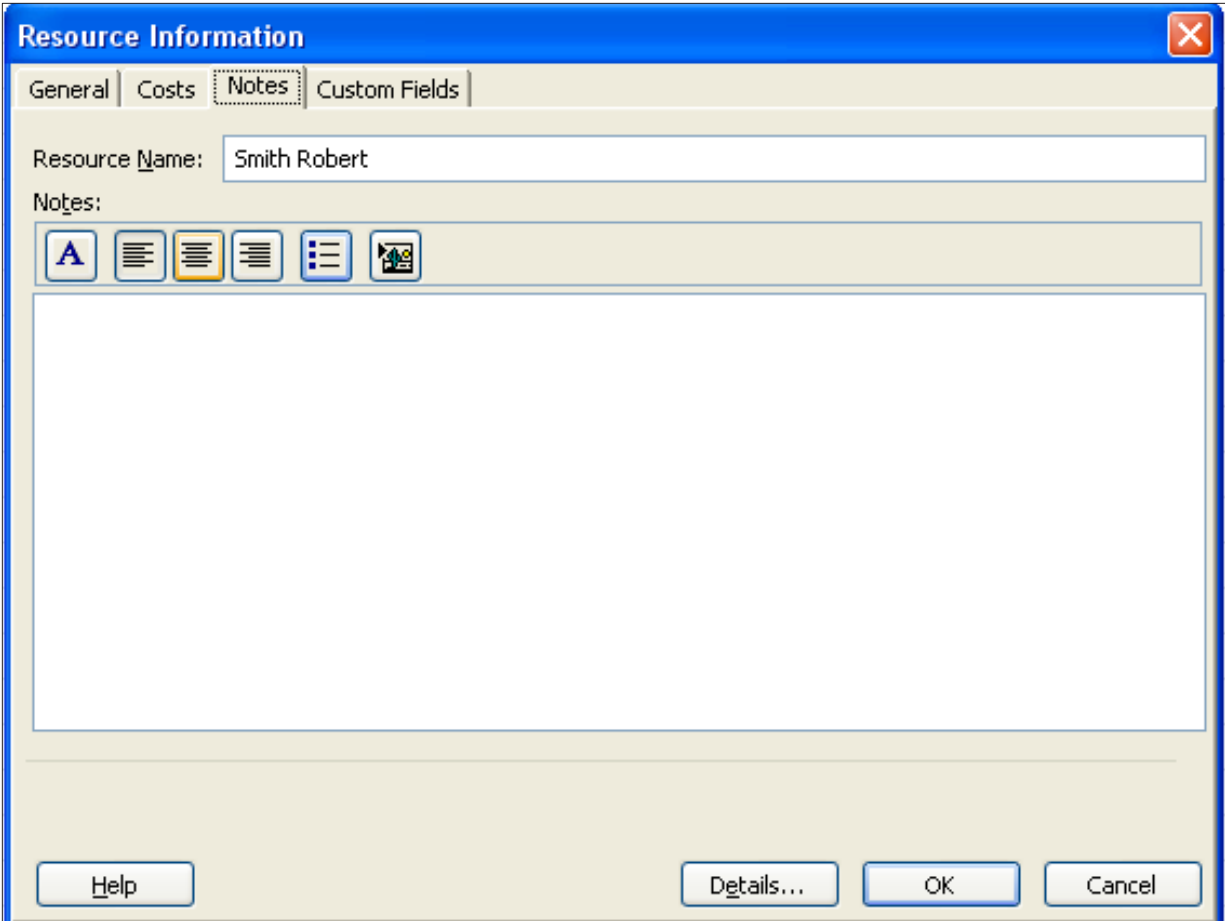


Figure 7-6 PLACEHOLDER

Custom Fields tab data:  
This tab is reserved for Project Server or other applications that integrate with Project.

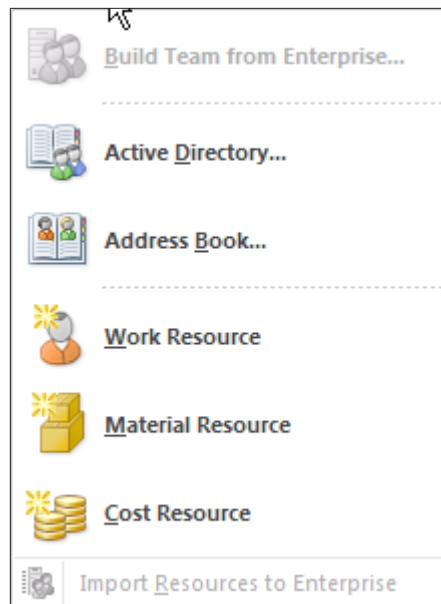


Figure 7-7 PLACEHOLDER

## Material Resources

Material resources are supplies to be used by the project, such as paint, building materials, equipment, etc. Material resources are valued based on the quantity of material to be used which is assigned to a task.

Below are the fields associated with Material resources.

**Resource name:** name of the consumable item

**Type:** Material

**Material label:** boxes, gallons, feet, each – the label that describes the material

**Standard rate:** the per unit/each price



Resource Name ▼	Type ▼	Material ▼	Initials ▼	Group ▼	Max. ▼	Std. Rate ▼	Ovt. Rate ▼	Cost/Use ▼	Accrue At ▼
Smith Robert	Work		RS		100%	\$100.00/hr	\$0.00/hr	\$0.00	Prorated
Paint	Material	gallons	P			\$25.00		\$0.00	End
PC's	Material	desktops	PC			\$2,000.00		\$0.00	Prorated
Boxes	Material	each	B			\$10.00		\$0.00	Prorated

Figure 7-8 PLACEHOLDER

## Cost Resource: Lite

Cost resources are used to apply estimated costs specific tasks in a project. Estimated costs are entered during the planning stage and tracked when actual costs are entered during the execution or control stage of the project.

To enter a cost resource:

**Resource name:** For example: Cost travel, Cost food, Cost room rental, etc.

**Type:** Cost

No other information is required. The amount of the cost will be added at the time the assignment is created.



When naming cost resources include "Cost" as the first word in the name. It will be helpful when assigning cost resources for the name to give an indication of the resource type. Resources appear in alphabetical order when creating assignments and including "Cost" as the first word ensures all Cost resources will be grouped together in the list.


		Resource Name ▾	Type ▾	Material ▾	Initials ▾	Group ▾	Max. ▾	Std. Rate ▾	Ovt. Rate ▾	Cost/Use ▾	Accrue At ▾	Base Calendar ▾
1		Smith Robert	Work		RS		100%	\$100.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
2		Paint	Material	gallons	P			\$25.00		\$0.00	End	
3		PC's	Material	desktops	PC			\$2,000.00		\$0.00	Prorated	
4		Boxes	Material	each	B			\$10.00		\$0.00	Prorated	
5		Cost travel	Cost		C						Prorated	
6		Cost food	Cost		C						Prorated	
7		Cost room rental	Cost		C						Prorated	

Figure 7-9 PLACEHOLDER

Note to Cindy – find assignment information.



## Chapter 8

# **Fine Tune the Project Schedule**

---

## Applying Groups and Filters to Views

---

Most views in Project contain a table which provides a collection of columns/fields for display. These fields can be used to further refine the information displayed and potentially printed. Grouping and filtering are techniques to refine a view.

A group is a way to categorize and view information. A filter is a way to provide a subset of a collection of data. Filters hide rows of information that do not meet the condition of the filter. A highlight filter is an alternative to a regular filter and it is used to display all information, but visually shade the rows that meet the filter condition.



Groups and filters can applied together or separately.



If you apply a built-in group or filter option, you can tailor a view even if the field(s) used is not displayed.



Filters apply to information that is currently displayed. If you have a previous filter applied or an outline level applied, your filter may not produce the desired results.

---

## How to Apply a Group

---

1. Click the **View** tab
2. Click the drop-down arrow on **No Group** in the Data group
3. Click the desired group or click **More Groups**

## How to Apply a Column-Based Group

---

1. Locate the column/field you wish to group on
2. Click the drop-down arrow on the column heading and click **Group by** to display a menu of choices
3. Click the desired option



Click the column heading to select it and then click the drop-down arrow to generate a new choice **Group** on this field.

## How to Remove a Group

---

1. Click the **View** tab
2. Click the drop-down arrow on **Group Name** in the Data group
3. Click **No Group** or **Clear Group**

## How to Apply a Filter

---

1. Click the **View** tab
2. Click the drop-down arrow on **No Filter** in the Data group
3. Click the desired filter or click **More Filters**
4. If a dialog box appears requesting specific information, complete the information and click **OK**

## How to Apply an AutoFilter

---

1. Locate the column/field you wish to filter on
2. Click the drop-down arrow on the column heading and select or deselect the appropriate check boxes to set the filter conditions
3. Click **OK** to apply the filter

## How to Apply a Highlight Filter

---

1. Click the **View** tab
2. Click the drop-down arrow on **No Highlight** in the Data group
3. Click the desired filter or click **More Filters**
4. If a dialog box appears requesting specific information, complete the information and click **OK**

## How to Remove All Filters

---

1. Click the **View** tab
2. Click the drop-down arrow on **Filter Name** in the Data group
3. Click **No Filter** or **Clear Filter**



A fast way to remove all filters is to press **F3**.

## What are Groups?

---

A group is a way to categorize and view information. A filter is a way to provide a subset of a collection of data.

# Built-in Groups



Groups and filters can applied together or separately.

Table 8.1 Task Groups Provided by Default

Group name	Fields/Columns using in the Group
Active vs. Inactive	Active
Auto scheduled vs. Manually scheduled	Task Mode
Complete vs. Incomplete	% Complete
Constraint Type	Constraint Type
Critical	Critical
Duration	Duration
Duration then Priority	Duration, Priority
Milestone	Milestone
Priority	Priority
Priority keeping outline structure	Project, Outline number, Priority
Resource	Resource Name



**Table 8.1** Task Groups Provided by Default

Group name	Fields/Columns using in the Group
Status	Status

**Table 8.2** Resource Groups Provided by Default

Group name	Fields/columns used in the group
Complete and Incomplete Resources	% Work Complete
Resource Group	Group
Resource Type	Type
Standard Rate	Standard Rate
Work vs. Material	Type

**Table 8.3** Assignment Groups Provided by Default

Group Name	Fields/columns used in the group	Comments
Assignments keeping outline structure	Name, Task outline number	May only be used from Resource Usage view

## Built-in Filters

Table 8.4 Task Filters Provided by Default

Filter	Fields/Columns used in the Filter	Generates a Dialog Box for Input
Active Tasks	Active	
Automatic scheduled tasks	Task Mode	
Completed Tasks	% complete	
Costs Greater Than...	Cost	X
Cost Overbudget	Cost v Baseline cost	
Created After...	Created	X
Critical	Critical	
Date Range...	Start, Finish	X
In Progress Tasks	Actual start, Actual finish	
Incomplete tasks	% complete, % work complete for the assignment	
Late tasks	Status	
Late/Overbudget Tasks Assigned To...	Resource Name, baseline finish, Finish v Baseline finish, Cost v Baseline cost	X
Linked fields	Linked fields	

Table 8.4 Task Filters Provided by Default

Filter	Fields/Columns used in the Filter	Generates a Dialog Box for Input
<b>Manually Scheduled Tasks</b>	Task Mode	
<b>Milestones</b>	Milestone	
<b>Resource Groups...</b>	Resource Groups	X
<b>Should Start By...</b>	Start v Actual Start	X
<b>Slipped/ Late Tasks</b>	Baseline Finish, Finish v baseline finish, BCWS v BCWP	
<b>Slipping Tasks</b>	Actual finish, Baseline finish, Finish v Baseline finish	
<b>Summary tasks</b>	Summary	
<b>Task range...</b>	ID (range of task ID numbers)	X
<b>Tasks with a Task Calendar Assigned</b>	Task Calendar	
<b>Tasks with Attachments</b>	Objects, Notes	
<b>Tasks with Deadlines</b>	Deadline	
<b>Tasks with estimated Durations</b>	Estimated	
<b>Tasks with Fixed Dates</b>	Constraint type, actual start	
<b>Tasks without Dates</b>	Start, Finish	

Table 8.4 Task Filters Provided by Default

Filter	Fields/Columns used in the Filter	Generates a Dialog Box for Input
Tasks/Assignments with Overtime	Overtime Work	
Top level tasks	Outline level	
Unstarted tasks	Actual Start	
Using Resource In Date Range...	Resource name, Start, Finish	X
Using Resource...	Resource Name	X
Work overbudget	Actual Work vs. Baseline Work	

Resource filters provided are:

Table 8.5 Resource Filters Provided by Default

Filter	Fields/Columns used in the Filter	Generates a Dialog Box for Input
Budget Resources	Budget	
Costs Greater Than...	Cost	X
Cost Overbudget	Cost v Baseline cost	
Created After...	Created	X
Date Range...	Start, Finish	X

Table 8.5 Resource Filters Provided by Default

Filter	Fields/Columns used in the Filter	Generates a Dialog Box for Input
Group...	Group	X
In Progress Assignments	Actual start, Actual finish	
Linked Fields	Linked fields	
Non-budget Resources	Budget	
Overallocated Resources	Overallocated, Assignment	
Resource Range...	ID	X
Resource - Cost...	Type	X
Resource - Material	Type	
Resource - Work	Type	
Resources With Attachments	Objects, Notes	
Resource/Assignments With Overtime	Overtime Work	
Should Start By...	Assignments, Actual Start	X
Should Start/Finish by...	Start, Finish	X
Slipped/Late Progress	Baseline finish, Finish, WCWS	
Slipping Assignments	Actual finish, Baseline finish, Finish	
Unstarted Assignments	Actual start	

**Table 8.5** Resource Filters Provided by Default

Filter	Fields/Columns used in the Filter	Generates a Dialog Box for Input
Work Complete	% complete	
Work Incomplete	% complete, Work	
Work Overbudget	Work v Baseline Work	

## Sorting Tasks or Resources in a View

---

Project initially arranges tasks according to ID number which is located in the far left column of the Gantt Chart view. To make it easier to work with your tasks, you may want to temporarily or permanently rearrange them. You can rearrange the order of tasks based on a particular type of information, including start date, finish date, priority, cost, and ID.

When you sort a project that contains summary tasks, Project maintains the outline levels and bases the sort on the summary task values. For example, if you sort a group of summary tasks by start date, Project bases the order on the start date of each summary task. Project then sorts the tasks within each summary task.

You can also sort resources in most resource views. By default, resources are arranged in ascending order based on the ID number, but you can sort resources by cost or name.

You can also perform a custom sort by specifying up to three sort fields. Sorting by more than one field is helpful when more than one task contains the same information in some fields. For example, if you sort by the duration and more than one task has the same duration, you can

determine the order of those tasks by sorting by an additional field, such as the start date.

To sort information within a view:

1. Click the **View** tab
2. Click the drop-down arrow on **Sort** in the Data group
3. Click the desired option or click **Sort By** for more options

## How to Sort Information

---

1. Click the **View** tab
2. Click the drop-down arrow on **Sort** in the Data group
3. Click the desired sort option or click **Sort by**



Choosing Permanently renumber tasks in the Sort By dialog box will renumber all rows in the view. This option is not recommended in a task view, such as Gantt Chart , since that will permanently change the order of items in your schedule.

## How to Apply a Column Based Sort

---

1. Locate the column/field you wish to sort on
2. Click the drop-down arrow on the column heading and select **Sort A to Z** or **Sort Z to A**

## How to Reset a Sort Back to Default

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1. Click the **View** tab
2. Click the drop-down arrow on **Sort** in the Data group
3. Click **by ID**



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## Critical Path

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### What is a Critical Path

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The Critical Path is the longest path of tasks through the network of tasks for the schedule. It represents the timeline of the schedule and establishes the end date for the project. It is the minimum time that it will take to complete the project. Tasks not included in the network of tasks will not be included in critical path calculation.



For a more accurate critical path calculation, all tasks should have a predecessor and a successor except the first and last tasks of a project.

Checking the contents of the predecessor and successor columns to make sure all tasks have valid entries is helpful.

Any task on the critical path is known as a Critical Task. If a critical task slips, the end date of the project will be negatively affected.

Scheduling factors contributing to the Critical Path calculation include:

- Relationships between tasks
- Lead and Lag time
- Duration of tasks
- Constraints
- Task Calendars
- Resource Availability
- Resource Assignments

Project will automatically recalculate the critical path each time a task is changed. The calculation is making a forward and backward pass through the schedule looking for time gaps between tasks. This time gap is called slack which is also known as float. If a task has slack, it is considered non-critical. When a task has no slack, it is considered critical. Slack

can be both a positive or negative value.

Every project schedule should include float or slack in order to address contingencies. No project will run exactly as planned. Float or slack will provide the extra time needed to handle unknown problems that will arise during the execution of a project.

There are 2 types of slack calculated in Project 2010:

- Total slack is the amount of time a task can slip without affecting the end date of the project.
- Free slack is the amount of time a task can slip before it affects its immediate successor task. If a task only has one successor, free slack will be the same as total slack.

This type of critical path calculation is based on tasks.



Resources can also be critical within a project schedule. During the execution of the project, different resources will become critical at different points within the schedule. If a critical resource is not available at a critical point, the entire project could be affected as well as the ending date.

Frequently, during the execution of a project, a task that was not originally on the critical path will become critical. Careful tracking and monitoring of the critical path during the management of the project will help keep the project manager on track to achieve the goal of the projected end date.

## Formatting Views to Display Critical Path

---

Slack is essentially scheduling breathing space for a project and occurs when a particular task can be delayed without affecting the end of the project. The greater the slack, the more breathing space you will have to help manage problems that may occur during the performance of the project. If a schedule fails to include slack, the plan for the schedule might be unobtainable. Since projects are typically never performed exactly as sched-

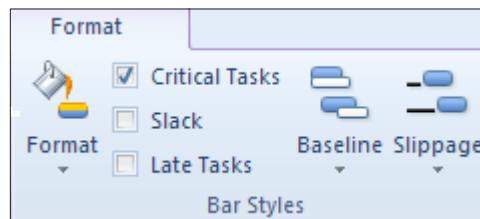
uled, slack becomes essential to achieving the goal date for the project.

Each time a task is changed in Project, the critical path is recalculated automatically.

Project provides the ability to format the Gantt Chart view to identify critical tasks and tasks with slack time.

To turn on Critical Task and Slack formatting:

1. Click the **Format** tab
2. Click **Critical Tasks** and click **Slack** as desired in the Bar Styles group



**Figure 8-1** PLACEHOLDER

The critical path is shown as red Gantt bars and the non-critical tasks appear a blue Gantt bars. Once you have displayed the critical path, you will have a better understanding of the specific tasks which are driving the ending date of your project schedule.

## Shortening the Critical Path

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## Viewing Resource Assignments

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Once assignments are created, refining them and looking at them from different points of view is not only helpful but necessary. If resource allocations and future resource demands are your goals for using Project, taking a deeper look at the results of how the assignments were created will be essential.

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## Resource Usage View

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The purpose of the Resource Usage view is to allow viewing and updating of assignments from the resource point of view. This view displays all assignments created for a resource as well as assignment details. Information may be viewed at any level of timescale detail that is appropriate for your project.

You will be able to use this view to answer the following questions:

- How much availability does a resource have?
- What is the cost of having a resource work on a task?
- Are all of the tasks assigned to a resource?
- How many hours is a resource assigned to a task?
- Is a resource overallocated? (Overbooked)
- What is the future demand for a resource for this project?
- What is the total number of hours for a resource assigned to the project?



The Resource Usage view may be used for resource work distribution worksheets. When this view is printed, a timeframe may be added to allow for more focused printing. Insert a page break between resources to print separate reports for each resource.

## Task Usage View

---

Task Usage view is very similar to the Resource Usage view, however, the content is shown from the task perspective. Each task is displayed with the resources assigned to the task. The scheduler will be able to see a complete picture of the details of assignments. This view may also be used for changing or fine tuning assignments. Information may be viewed at any level of timescale detail that is appropriate for your project.

- What resources are assigned to a task?
- Which tasks do not have a resource assigned?
- What is the total cost and number of hours of a task?
- What is the remaining work of a task?
- What percent allocations are my resources assigned to tasks?
- What is the distribution of work for all the resources on the task?

## How to Display Resource Usage View

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1. Click the **View** tab
2. Click **Resource Usage** in the Resource Views group

## How to Display Task Usage View

---

1. Click the **View** tab
2. Click **Task Usage** in the Tasks Views group

## How to Adjust Information in the TimePhased Grid on Resource Usage or Task Usage View

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1. Click the **Format** tab
2. Click **Add Details** in the Details group
3. Select the desired field(s) on the left and click **Show** or select the desired field(s) on the right and click **Hide**
4. Click **OK** to apply the changes

## Team Planner View

---

The purpose of this view is to show resources and their assignments using a Gantt style format. The team planner view will help the scheduler identify overallocations within the schedule, level workloads, reassign resources to tasks and identify problems in the schedule from the resource point of view.



Team Planner view is only available in Project 2010 Professional.

Team Planner view is divided into 2 sections. The upper section contains one row for each resource, with bars to the right representing assigned work. The lower section contains bars representing tasks without resources.

# How to Display Team Planner View

- 1. Click the **View** tab
- 2. Click **Team Planner** in the Resoure Views group

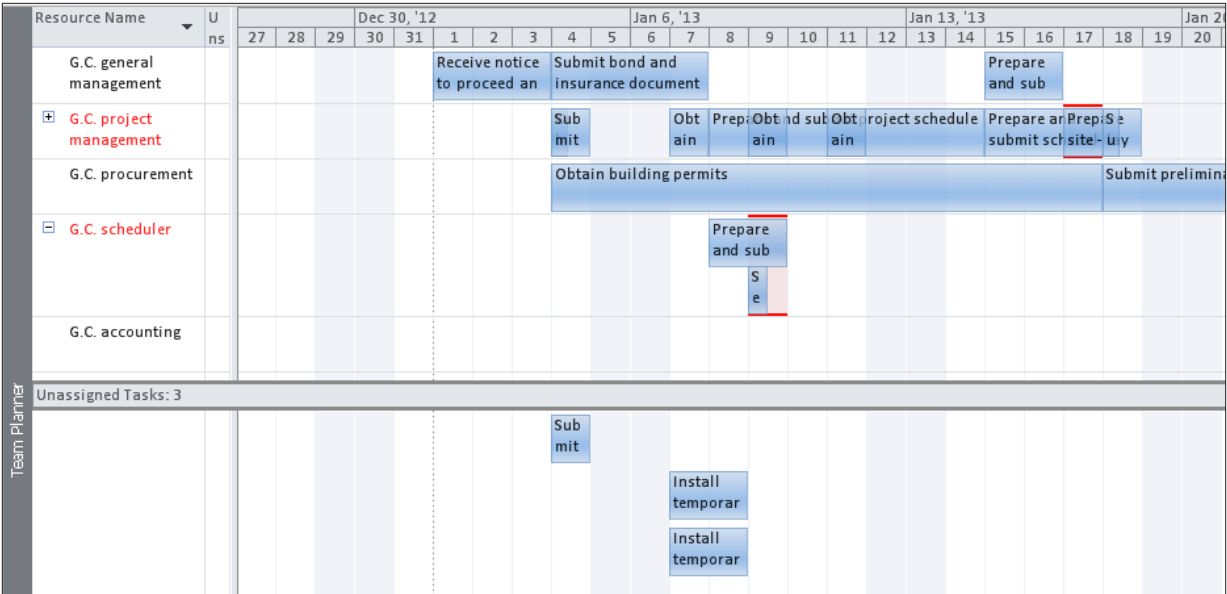


Figure 8-2 PLACEHOLDER

Below is a chart to help with understanding how to interpret the information in the view:

Table 8.6 Team Planner View Legend

Feature	Description
A vertical orange line	Today's date
Tasks colored in darker blue	Progress on the task
Teal colored tasks	Manually scheduled tasks

**Table 8.6** Team Planner View Legend

Feature	Description
Gray colored tasks	External tasks
Light blue colored tasks	Un-started tasks
Gaps in timelines for resources	Under-allocated resource or unavailable
Red lines on the top and bottom of the task	Overallocated tasks
Resource name in red	Overallocated resource
Task bars colored black	Tasks that are late
Shaded day on calendar	Non-working day for the resource. This data is coming from the resource availability calendar
Top pane – pink blocks of time	Overallocated time

Below are some of the mouse shortcuts that will help you work with the information in this view.

**Table 8.7** Mouse Shortcuts for Team Planner View

Action	Result
Double click the resource name	Resource Information dialog box
Double click a work task bar	Task Information dialog box



**Table 8.7** Mouse Shortcuts for Team Planner View

Action	Result
<b>Timescale density</b>	Adjust as needed – lower right corner
<b>Hover over task</b>	Pop up of task details
<b>Double click on timescale</b>	Opens the timescale box to alter scale values
<b>Right click on a task</b>	More options:
<b>Right click on an assignment – Reassign to:</b>	This option presents a list of all resources in the schedule, including resources already assigned to the task. Select a resource to reassign to the task or select unassigned option and all assignments will be removed from the task.
<b>Right click on an assignment – Inactivate:</b>	Task will disappear from the Team Planner view. To reactive, return to Gantt chart view.



Only active tasks will show in the team planner view.

# Leveling and Views that Show the Assignments

## Understanding Overallocations

Each resource is assigned a calendar when entered on the Resource Sheet. The calendar is customized to contain the availability of the resource. When more work is assigned to a resource than time available on their resource calendar, the resource is considered to be overallocated. The overallocation calculation is looking at resource assignments on a minute by minute basis. If a resource is overbooked for even 1 minute, the resource is considered overallocated.

When a resource is overallocated, a red person symbol appears in the indicator column. This indicates that there is an overallocated resource assigned to the task but will not indicate which resource is affected. Even though resources are overallocated, assignments can continue to be created.

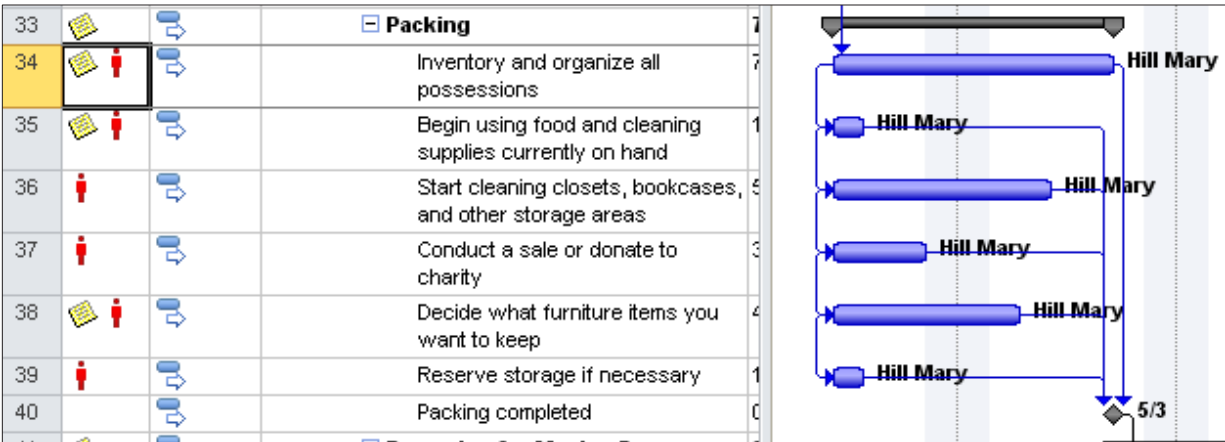


Figure 8-3 PLACEHOLDER

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## **Real World Application of Scheduling: Shortening the Schedule and Resolving Resource Conflicts**

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Scheduling involves not only creating a detailed schedule and assigning resources, but it involves modifying the schedule to meet goals and to work with limitations. Typically there is a goal to complete the schedule on time and a common limitation is availability of resources. This section will address those areas.

### **Shortening the Schedule**

---

Once you create your schedule, arrange the tasks, and assign resources to the tasks, you may realize that the schedule does not meet your original goals. You may have a deadline or a budget that you must meet. Listed below are several ways to shorten your schedule. The method you choose depends on your individual project and resources.

The best way to shorten your project is to shorten the critical path. The critical path includes those tasks that affect the duration of the project. If a critical task finishes late, it delays the entire project. If a critical task finishes early, it shortens the duration of the project. If you shorten the length of the critical path, you shorten the duration of your project, and your project finishes sooner.

Some options to consider for shortening the project schedule are:

- Assign additional resources
- Assign a resource to work overtime
- Increase working time (calendar)
- Break task into smaller tasks
- Overlap key activities (multi-tasking)

- Delete tasks
- Redefine quality (less time on activities)
- Break project into phases
- Change dependencies of tasks

## Resolving Resource Conflicts

---

The most common resource conflict is that a resource is overallocated. This means they have more work assigned to them than they can realistically complete in the given time frame.

While there are multiple ways to manage resource allocation, it is important to find and analyze resource overallocation and evaluate the overall effect on the project schedule.

Some options to consider for solving resource conflicts are:

- Hire additional resources
- Replace a resource on a task
- Assign a resource to work overtime
- Increase work time (calendar)
- Break a task up and move a portion of a task till a resource is available
- Delay the entire task until a resource is available
- Adjust the division of work across the task (work contour)
- Move or create a constraint on the task until the resource is available
- Delete tasks
- Change overlapping tasks into sequential tasks
- Use Project's leveling feature
- Use Task Inspector to solve the problem
- Use Team Planner to solve the problem



Notice the similarity with features already mentioned to shorten the schedule.

## Views to Identify Overallocations

---

There are several views in Project that will help analyze resource overallocations. After an overallocation situation is discovered, research should be carried out to understand where the overallocation exists.

The views below will help locate these problems:

- Gantt Chart view
- Resource sheet
- Resource graph
- Resource allocation view
- Team Planner
- Task Usage view
- Resource Usage view

Techniques to help work with overallocations will be illustrated next. You may have already discovered some of these on your own while using Project.

## Using Indicators

---

In the Gantt Chart view, you will immediately be notified if there is an over-allocated resource on a task when the red stick figure appears. If you hover the cursor on this icon, the display indicates resources are overallocated. This indicator is a handy and quick visual cue to identify overallocated resources.

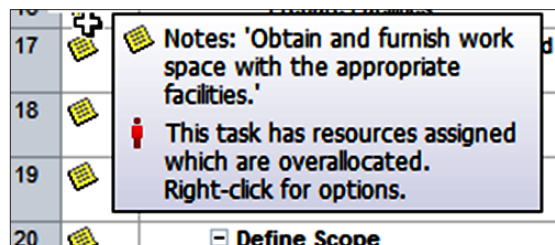


Figure 8-4 Overallocated Resource

## Using the Resource Allocation View

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The Resource Allocation view is a combination view that shows resource assignments in a Resource Usage pane along with a personal Gantt chart in the lower pane. The advantage of this view is you can see both numerically and visually what a resource is working on and use either the upper or lower pane to quickly make modifications.

To use the Resource Allocation view to identify resource commitment issues:

## How to Display Resource Allocation View

---

1. Click the **View** tab
2. Click the drop down arrow on **Other Views** in the Resource Views group
3. Click **More Views**
4. Click **Resource Allocation**
5. Click **Apply**

---

## Methods for Resolving Resource Conflicts

---

In this section, you will be exposed to many different methods for analyzing and resolving resource conflicts. It will be up to you to determine the correct mix of options for the schedule. Some methods will be more manually driven, while other methods will take advantage of some automatic features in Project. Methods that are more automated may have more of a ripple effect that aren't expected so be sure to carefully choose the appropriate method. This list of methods is not meant to cover every possible scenario, but instead is presented to give suggested scenarios that are popular and easy to use. No order of priority is indicated with this list.

---

## Using Indicator Suggestions

---

For tasks that have a red stick figure in the indicators column, that means there is a resource conflict on the task. You can use shortcuts in Project to help fix that. Simply right click on the indicator field or name of the task and apply one of the options listed such as: **Fix in Task Inspector** or **Reschedule to Available Date**.

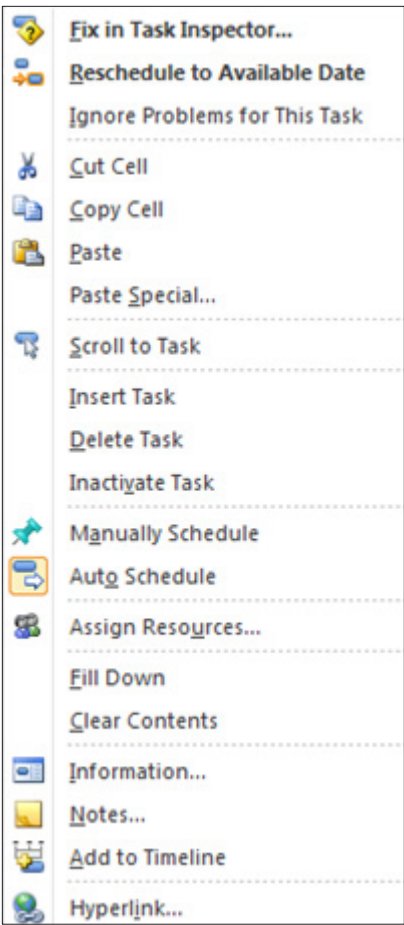


Figure 8-5 Context Menu from Overallocated Resource

# Using Task Inspector

---

Another option to evaluate and solve problems with the schedule is Task Inspector. Using this option gives you a pane to the left side of the Entry table. The advantage of Task Inspector is it provides critical information about the task and information about what is occurring at a specific time



and gives you options to correct any issues, including hyperlinks to the feature or area where you can make a change.

## How to Apply Task Inspector

---

1. Click the **Task** tab
2. Click **Inspect** in the Tasks group

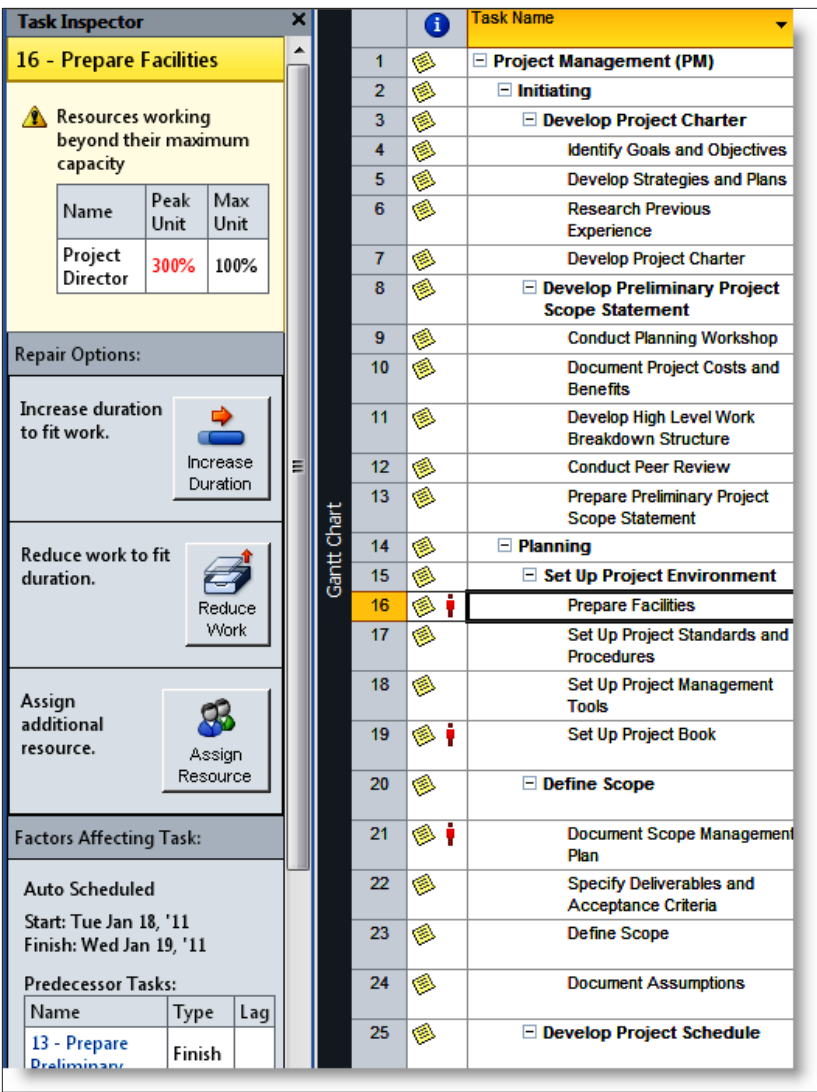


Figure 8-6 Task Inspector



Don't forget to consider the ripple effect of making a change to one task. As other tasks respond to this change, you may see a change in the critical path or introduce other resource conflicts.

## Changing Resource Assignments

---

When you look at resource assignments individually, you might see that one resource is very overworked; however, when you look at resources collectively, you might notice that some resources are underworked. One of the best ways to solve resource issues is to more equitably distribute the work. For example, Ricardo is assigned to a task at 150% while Angelica is assigned to a task at the exact same time at 25%. If you can find a way to shift some of Ricardo's work to Angelica, you will take better advantage of the availability of both resources. Changing assignments can be done in many different views such as Task Usage or Resource Usage view.



When you return to the Resource Allocation view, it will recalculate and remove that task from the resource you had selected. You may need to reselect that resource again if you want to see an updated lower pane and be able to continue making adjustments.

## Move a Task Until a Resource is Available

---

Sometimes the resource assigned to a task is the only person with the skill set that can do the work. In this case the only option is to move the task until the resource is available. One technique for moving a task is to shift by a timeperiod (e.g. week), another technique is to reschedule the task until the resource is available.



Moving a task will create a constraint on the task. To delay a resource assignment:

## How to Move Tasks to Account for Resource Limitations

---

1. Select the desired task (click on the row ID number or task name)
2. Click the **Task** tab
3. Click the drop down arrow on **Move** in the Tasks group
4. Click the desired option

## Assigning a Work Contour

---

When you assign a resource to a task, Project spreads the work out evenly over the duration of the task unless you specify otherwise. For example, if you assign a resource 100% to work 80 hours on a ten-day task, Project assigns eight hours of work per day. This is a flat contour.

Not all tasks require that the work be spread equally (a flat contour). For example, consider the building of a fine custom wooden cabinet, which is one task in a project that involves furnishing a house. The carpenter purchases the wood and other components, which requires trips to several specialty stores. He spreads the trip out over several days, while using some of his time to finish his previous project. Then he works full days for three weeks cutting and assembling the cabinet. In the middle of construction, he puts in some overtime.

After the construction phase is completed, he stains the wood, which takes two hours. The stain has to dry overnight. The next day, he applies a coat of varnish, which takes two hours. It, too, has to dry overnight.

The next day, he sands the varnish and applies another coat, which takes three hours. He applies three more coats of varnish, repeating the progress.

On the last day, he buffs the final coat, which takes an hour. Most of the work on the cabinet occurs during the middle of the project, peaking during a few days of overtime. Work at the beginning and end of the task is part-time.

You can change the work contour by manually modify the working hours in the timephased grid on the right side of the Task Usage or Resource Usage views.

## Using the Team Planner View

The Team Planner view is very visually pleasing and allows you to manage your schedule by resources instead of by task. Overallocations can be quickly corrected here and the impact on the resource or other resources is also quickly visible.

To use the Team Planner View to solve an overallocation:

- Locate the task that is causing a conflict (red lines above/below highlight the task), and simply drag the task to a new time period for the same resource or drag it to another resource.

Optionally – You can right click on the task and take advantage of features available in the short-cut menu (such as reassign to another resource).

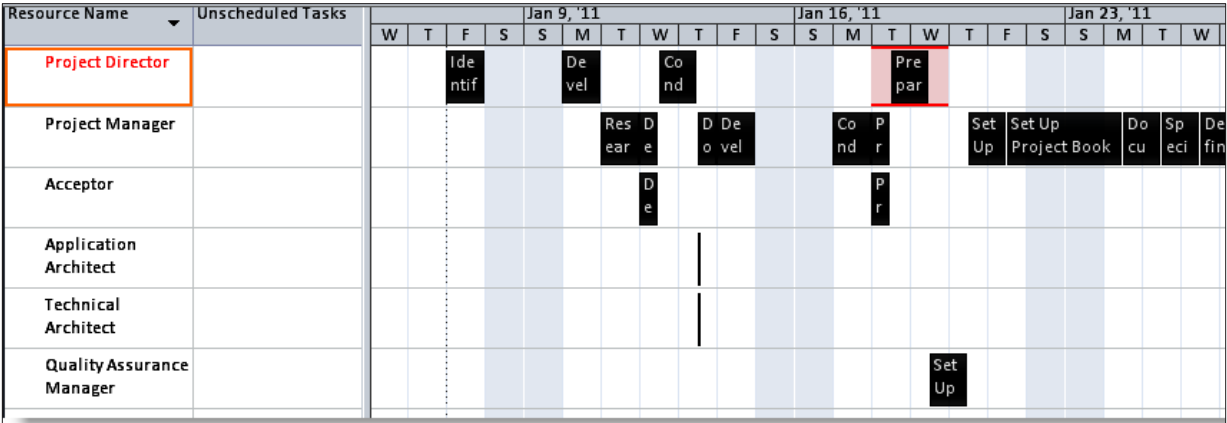


Figure 8-7 Team Planner View

The Team Planner view is also an easy way to assign tasks that currently do not have resources assigned to them. Unassigned tasks will appear at the bottom of the Team Planner view and can be dragged and

dropped to the appropriate resource.



Dragging a task to a new location will create a constraint on that task since you are essentially forcing it to happen a particular time. If you want to avoid constraints, use the Gantt Chart view and make other adjustments such as changing links or reassigning tasks.

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## Applying Leveling Features

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Leveling is a feature in Project that can be used to solve overallocations. While the software can't dream up a creative solution, it is able to shift, delay, and split tasks to take advantage of open spaces in your project where resources might be underallocated or where tasks can be delayed without shifting the end date. Should you choose, you can also indicate that your end date is flexible so there are more options for leveling to correct overallocations. Before you use leveling, be sure to consider the following scenarios and options.

These are three leveling scenarios you can choose:

**Level Selection** – use this option when you are in a task view and want to fix overallocated resources on specific tasks. This will leave overallocations for those same resources on other tasks untouched. Typically this option can help when you need to make sure you meet your commitments on the selected task(s), but do not want to address other tasks at the same time.

**Level Resource** – use this option when you are in a resource view and want to fix overallocations by resource. This choice would be suggested when you know that the availability of a specific resource will not change and you have to get the work done using this limited availability.

**Level All** – this option is when you want to fix overallocations across the entire project across all resources.

When you click Leveling Options, the following dialog box appears:

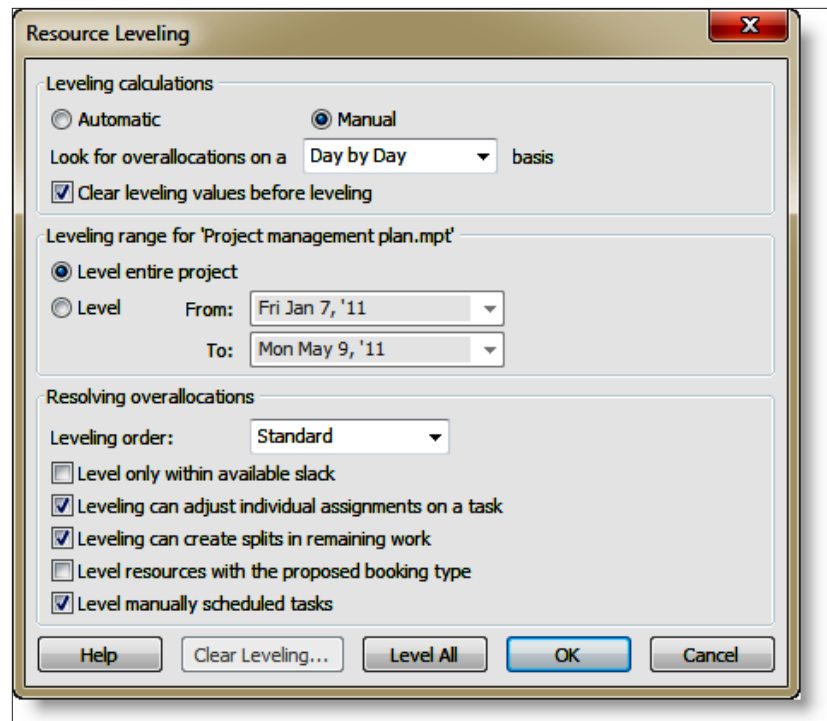


Figure 8-8 Resource Leveling Diagram

Please consider the following when selecting your options:

- Automatic is not recommended since it will level your project continuously without warning. Tasks will be delayed before you realize anything has happened.
- While Project offers an auto leveling feature to resolve overallocation, it is recommended that the project manager resolve overallocation manually. Overallocation can be a complex issue and requires analysis. Utilizing the auto leveling feature can diminish your ability to analyze and uncover the root cause of the overallocation.
- Consider changing Leveling order to “Priority, Standard” if you have set priority numbers on your tasks.
- Best Practice – Only use priority numbers to lock exception tasks down. For example, setting a task to a priority number of 1000 will make sure that they task does not move when you level. Essentially you are setting the task to be highest priority.

The Team Planner view is an interactive format allowing you to drag and drop activities directly on the right portion of the screen to alleviate

overallocations. Also of note is that unassigned tasks will appear at the bottom and can be assigned to resources by dragging and dropping them on the grid on the right.

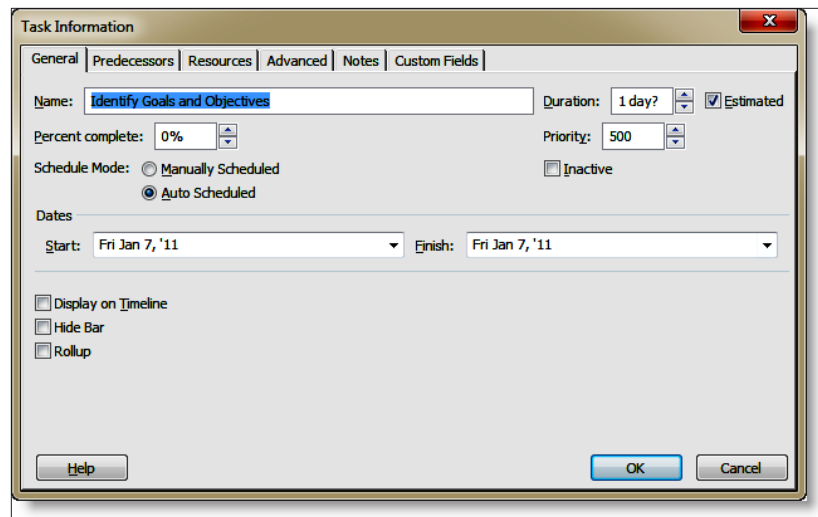


Figure 8-9 Task Information Dialog – General Tab

- “Level only within available slack” attempts to delay only non-critical tasks. The drawback to this feature is it limits Project’s ability to fix things.
- Best Practice – Run leveling first with the “Level only within available slack” option enabled to protect your critical path and observe the benefits before turning this option off and running leveling.
- “Leveling can adjust individual assignments on a task” means when a task is staffed with multiple resources, Project has the flexibility to move work resource by resource instead of moving the entire task and all resources at once.
- “Leveling can create splits in remaining work” means a task can be split as needed to get around other tasks that can’t be moved.



Be sure to review the splits created in your Project and undo the action if necessary. For example, if the result of this is a task that is split into 10 pieces, this is probably not a good result.



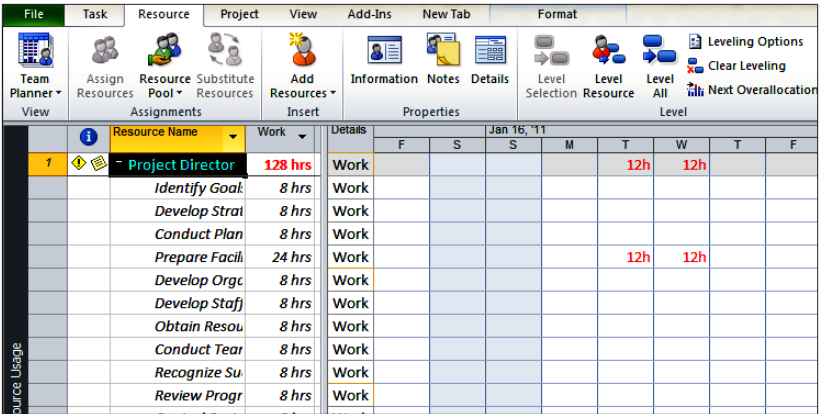


Figure 8-10 Leveling

To level your project:

## How to Apply Resource Leveling

1. Click the **Resource** tab
2. Click Leveling Options in the Level group
3. Choose desired options and click **OK** to save the settings or click **Level Now** to apply resource leveling immediately



To level by a specific resource, click **OK** on the leveling options and click **Level Resource** to choose a specific resource.

## How to Clear Resource Leveling

1. Click the **Resource** tab
2. Click **Clear Leveling** in the Level group