Contents

About Advisicon iv

About the Authors vi

1. Leveraging Technology for Project Management 1

Overview 2

Project Management as a Discipline 3

The Project Management Goal 3

The Goal 4

Six Core Competencies 4

Projects More Likely to Fail 5

Major Risk Factors Leading to Project Failure 5

Project Lifecycle Management 6

Leveraging Technology for Project Management 8

Different Project Lifecycle Approaches 9

Resource Management 1

Demand & Capacity Planning 11

Microsoft’s Project Management Solution 12

Project Professional vs Project Standard 13

Project Server 13

Tracking and Managing Planned vs Actual 13

PMI’s Practice Standard for Scheduling 15

Key Points to Remember 17

1. Getting Started and Navigating in Project 19

Overview 20

Software Standards Used in the Book 21

Understanding the Working Environment 22

Exploring the Ribbon 22

Backstage View (File Tab) 23

Exploring the Quick Access Toolbar 24

Setting Help Options 26

Setting Project Options 28

Scheduling and Methodologies 30

Getting Started with Project 32

Initiating a Project 32

Saving a New Project 33

Working with View Elements 35

Understanding the Gantt Chart View 35

Best Practice: Standard Reference 36

Using Navigational Shortcuts 37

Using Mouse Shortcuts 37

Zooming In and Out 37

Scrolling 37

Using the Scroll to Task Button 38

Adjusting The Divider Pane 39

Using Key Tips and Keyboard Shortcuts 39

Key Points to Remember 42

1. Best Practices with Task Development 43

Overview 44

Good, Better, and Best Practices 45

Project Overview and Pitfall Avoidance 46

Project Scheduling Modes – Auto vs Manual 46

Avoiding Accidental Constraints 48

Removing Constraints 48

Entering Tasks and Setting Dates Correctly 50

Moving the Timeline Forward and Back 51

Creating a Project Schedule 54

Entering Project Information 54

Types of Tasks 55

Activating Fields for Entry 57

Entering Task Information 57

Planning and Entering Task Estimates 58

Different Types of Durations 59

Inserting Tasks 60

Entering Recurring Tasks 61

Best Practice: Build your Project Management Lifecycle   
into Your Project Schedule 64

Deleting Tasks 64

Creating Milestones 65

Best Practice: Include Project Management Tasks 66

Key Points to Remember 68

1. Outlining and Linking Tasks 69

Overview 70

Outlining a Schedule 71

Indenting and Outdenting Tasks 72

Collapsing and Expanding the Outline 73

Moving and Copying Tasks 75

Trouble Spots for Outlining 76

Understanding Dynamic Scheduling 77

Creating Task Relationships 78

Linking Tasks with Finish to Start Relationships 79

Linking by Dragging 81

Linking Tasks with Other Types of Relationships 82

Best Practice: Avoid Linking These Items 84

Setting a Lead or Lag Time 85

Entering Tasks Relationships in the Entry Table 87

Reverse Engineering a Schedule 88

Setting the Project Schedule to Schedule Forward Again 89

Key Points to Remember 90

1. Working with Tasks and Advanced Settings 91

Overview 92

Changing Task Information 93

Changing Task Information in the Entry table of Gantt Chart View 93

Changing Task Information in the Task Information Dialog Box 93

Setting and Removing Deadlines 94

Attaching Notes 95

Setting Milestones 96

Scroll to Task 97

Active and Inactive Tasks 98

Entering Task Constraints 100

Types of Constraints 100

Setting and Using Task Constraints 100

Setting Full Constraints 102

How to Remove Constraints 102

Key Points to Remember 104

1. Creating and Assigning Resources 105

Overview 106

Overview of Task Types 107

Scenario 1: Entering a Constant Duration Value 107

Scenario 2: Entering a Constant Work Value 108

Creating the Resource Pool 109

Assigning Resources to Tasks 110

Using the Entry Table in Gantt Chart View 110

Using the Assign Resources or Two-Faced Button 111

Finding Tasks or Resources 114

Key Points to Remember 116

1. Using Views 117

Overview 118

Understanding the Basics of Views 119

Applying Views 120

Changing Views 120

Changing a Table 121

Remove or Add a Column 123

Hide or Remove a Column 123

Add a Column 123

Types of Views 126

Calendar 126

Detail Gantt 127

Leveling Gantt 127

Tracking Gantt 128

Multiple Baselines Gantt 129

Network Diagram 129

Resource Allocation 131

Resource Form 131

Resource Graph 132

Resource Sheet 133

Resource Usage 134

Task Details Form 134

Task Entry 135

Task Form 136

Task Usage 136

Team Planner 137

Timeline 138

Enhanced Work with Timeline View and Team Planner View 139

Team Planner View 139

Timeline View 141

Toggling Between Single and Dual Pane Views 142

Single Pane Views 142

Dual Pane Views 142

Applying a Filter to a View 144

Applying Groups to a View 146

Sorting Tasks or Resources in a View 147

Highlighting in a View 148

Reviewing Details in a View 149

Key Points to Remember 151

1. Managing Costs in Project 153

Overview 154

Reducing Costs in a Project 155

Reducing Cost Within a Project 155

Assigning Rates and Costs 156

Creating a Rate Table for Resources 156

Assigning a Rate Table to a Task 157

Resource Types 158

Working with Cost Resources 159

Entering Fixed Costs and Viewing Total Costs 160

Creating a Project Budget 162

Creating Budget Resources 162

Assigning a Budget Resource to the Project 163

Entering Budget Amounts 164

Viewing Budget Versus Total Costs 165

WBS (Rollup of Budget) 166

Key Points to Remember 168

1. Resolving Resource Conflicts 169

Overview 170

Real World Application of Scheduling – Resolving Resource Conflicts 171

Shortening the Schedule 171

Resolving Resource Overallocation 172

Finding Overallocated Resources 173

Using Indicators 173

Using the Resource Usage View 173

Using the Resource Allocation View 174

Using the Team Planner View 176

Methods for Resolving Resource Conflicts 177

Using Indicator Suggestions 177

Using Task Inspector 178

Changing Resource Assignments 180

Delaying a Resource Assignment 181

Splitting a Task 182

Assigning a Work Contour 183

Using the Team Planner View 185

Applying Leveling Features 186

Key Points to Remember 190

1. Tracking Task Progress 191

Overview 192

Updating Tasks 193

Tracking Activities With Project 193

Earned Value Reporting 203

Setting Earned Value and Calculation Options 203

Why Should I Perform Earned Value Analysis? 205

How Do I Interpret Earned Value? 205

Which Earned Value Quantities Can I Show in Microsoft Project? 207

Key Points to Remember 208

1. Sharing Information with Other Applications 209

Overview 210

Copying Information to and from Project 211

Copying Project Information into Other Applications 211

Copying Information into Project 214

Linking Data by Copy and Paste 216

Hyperlinking to Files 216

Exporting Timeline View 218

Key Points to Remember 219

1. Reporting in Project 221

Overview 222

Reporting in Project 223

Running Built-in Reports 224

Overview Report 225

Current Activities Reports 226

Costs Reports 227

Assignments Reports 228

Workload Reports 229

Visual Reports 230

Key Points to Remember 232

1. Formatting in Project 2010 233

Overview 234

Using the Format Tab 235

Formatting Text Styles 236

Formatting Selected Text 236

Formatting Categories of Text 237

Formatting the Gantt Chart 238

Changing the Gantt Bars Quickly Using a Style 238

Changing the Color, Shape, or Pattern of Gantt Bars 238

Creating a New Type of Gantt Bar 240

Adding Text to Gantt Bars 241

Changing the Appearance of Link Lines Between Gantt Bars 242

Key Points to Remember 244

1. Printing from Project 245

Overview 246

Mastering Printing 247

Previewing a Project Before Printing 247

Printing Specific Information 248

Using the Page Setup Option 248

Creating Headers and Footers 250

Save as PDF 251

Key Points to Remember 253

1. Tracking Resource Progress 257

Overview 258

Updating Resources 259

Tracking Resources With Project 260

Key Points to Remember 270

1. Working with Resources and Task Types 271

Overview 272

Understanding Project’s Scheduling Engine 273

Mastering Task Types 274

Max Units, Peak Units and Assignment Units 274

Working with Task Types 275

Controlling Calculations During Initial Assignments (application of the formula) 276

Controlling Calculations During Assignment Changes 282

Using Peak Units for Resource Planning 285

Key Points to Remember 287

1. Customizing Project 289

Overview 290

Customizing Microsoft Project 291

Global Transfer of View Options 291

Using Custom fields 291

Creating Custom Filters 295

Create Custom Groups 296

Key Points to Remember 298

1. Feature Changes from Project 2007 299

Add-Ins, Sample Macros, and the Project Guide 300

Save as Excel Pivot Table 300

1. Advanced Topics 303

Overview of a Shared Resource Pool 304

1. Certification 305

The Microsoft Project Professional 2010 Certification Exam 306

Important Tips About the Exam 306

PMI Scheduling Professional Credential (PMI-SP) 307

Why Get Certified 307

Requirements to Apply for This Credential 308

Ongoing Education Requirements 308

1. Glossary 309
2. Advisicon Services and Training 361

About Advisicon 362

Consulting and Training Services 362

Training Programs 364

Advisicon Project Management Courses 364

Advisicon Microsoft Office Project Management Technology Courses 364

Advisicon Flowcharts 367

Advisicon Project Management Tools 368