

MICROSOFT PROJECT 2010 TUTORIAL 3—TRACKING AND REPORTING

Introduction

In this tutorial, you will learn the following skills to learn how to track and report a project's progress:

- Setting the project's baseline
- Updating the project's progress
- Creating standard reports

Review

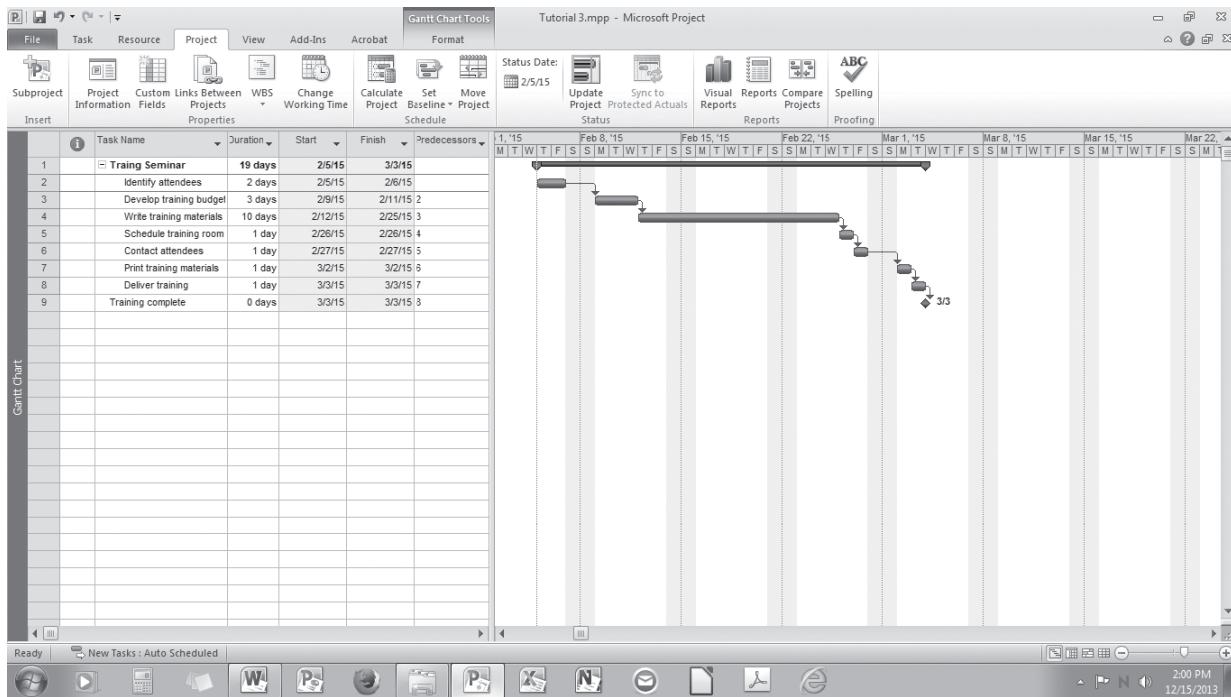
To begin this tutorial, let's review some of the skills that you learned in the previous tutorials by setting up a basic project plan. Be sure to refer back to those tutorials if you have any questions along the way.

YOUR TURN

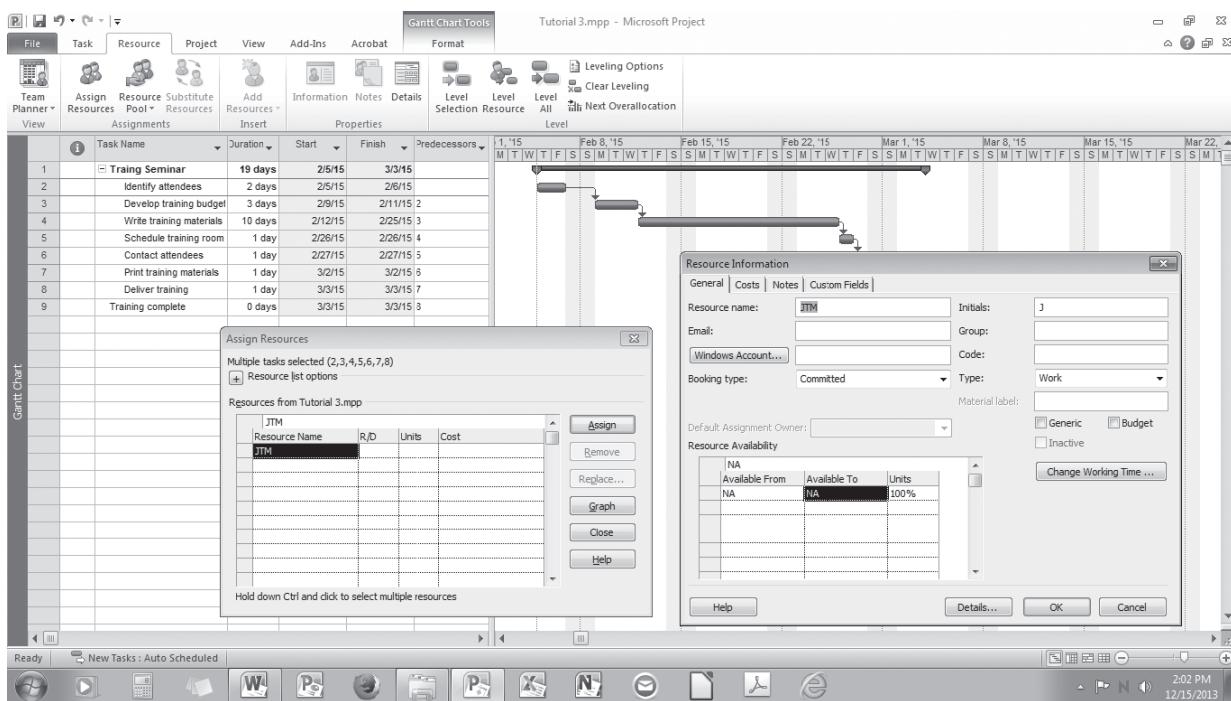
Let's say that you have been given the opportunity to develop and teach a training seminar for a new software system that is being developed. *Start MSP, set MSP to Auto Scheduling, and create the following WBS.*

Training Seminar	Estimate
• Identify attendees	2 days
• Develop training budget	3 days
• Write training materials	10 days
• Schedule training room	1 day
• Contact attendees	1 day
• Print training materials	1 day
• Deliver training	1 day
Training complete	Milestone

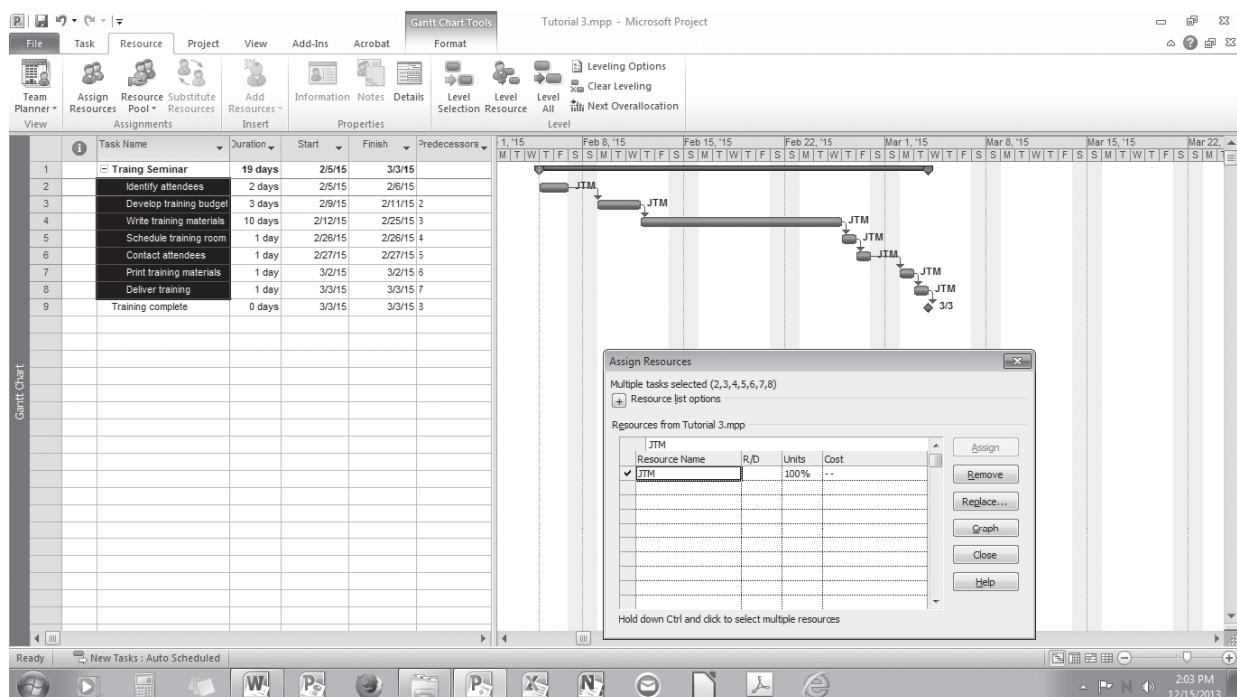
Link all the tasks and milestone using a Finish-to-Start relationship. You can choose when you want the project to start (i.e., today, tomorrow, next week, etc.). Your project plan should look as follows:



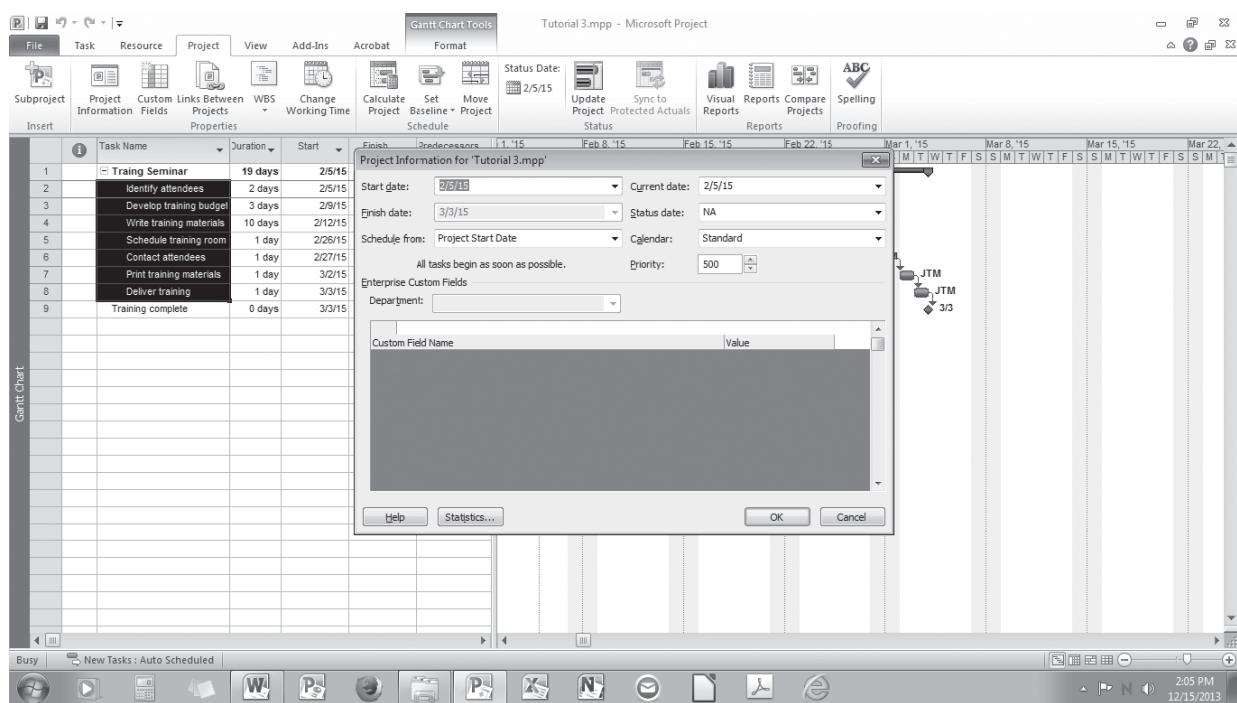
Now use your initials to add yourself as a resource to the project and assign a cost of \$25.00 an hour.



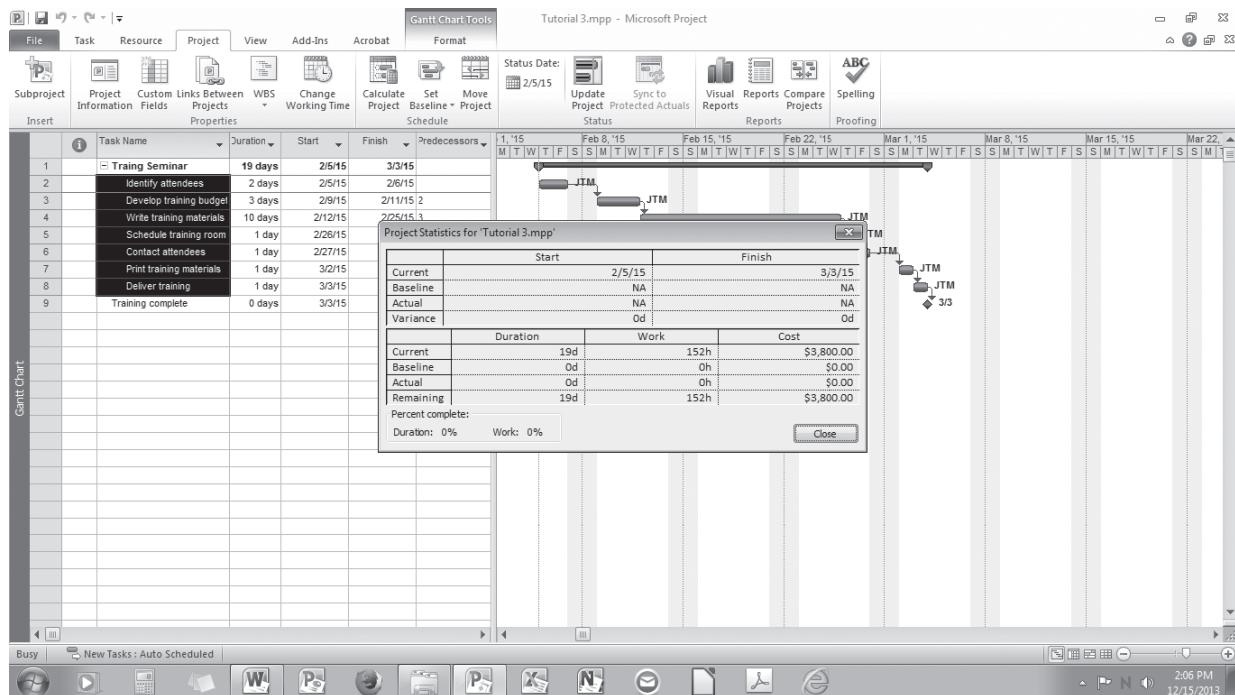
Now assign yourself to each of the tasks.



Now go to **Project Information** under the **Project Ribbon** to bring up the **Project Information Dialog Box**.



Then click the **Statistics** button. Your project plan should have a schedule of 19 days and a budget of \$3,800.00.

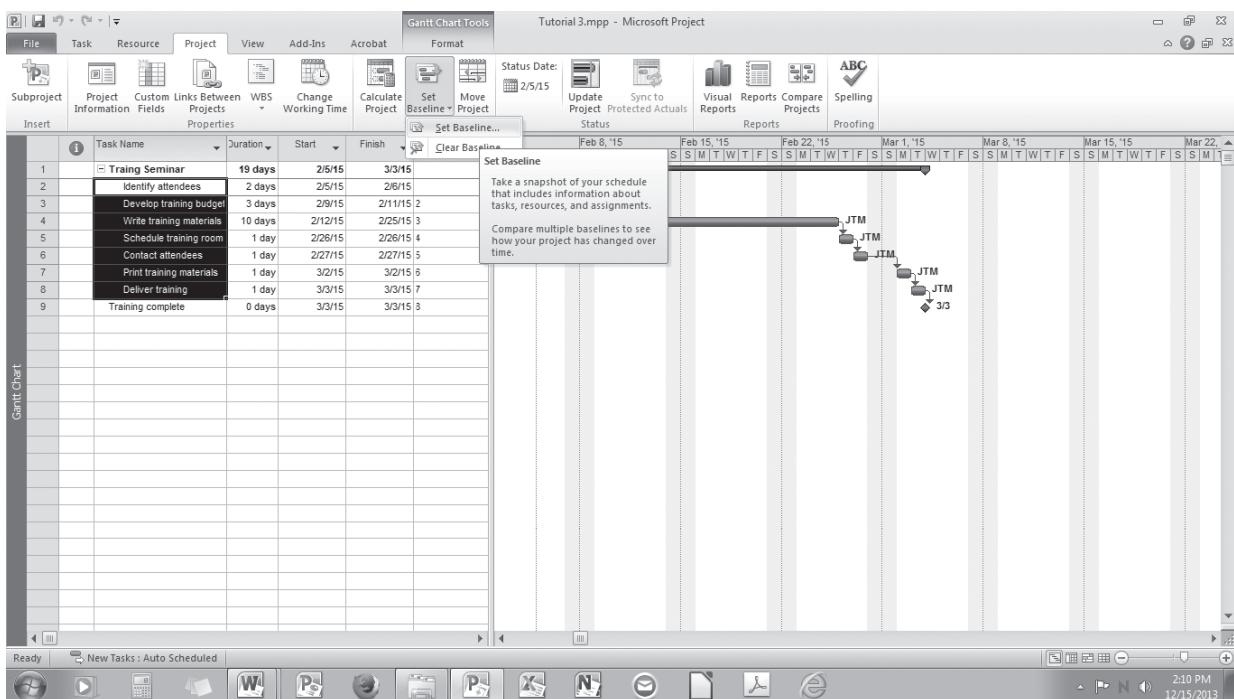


The Baseline

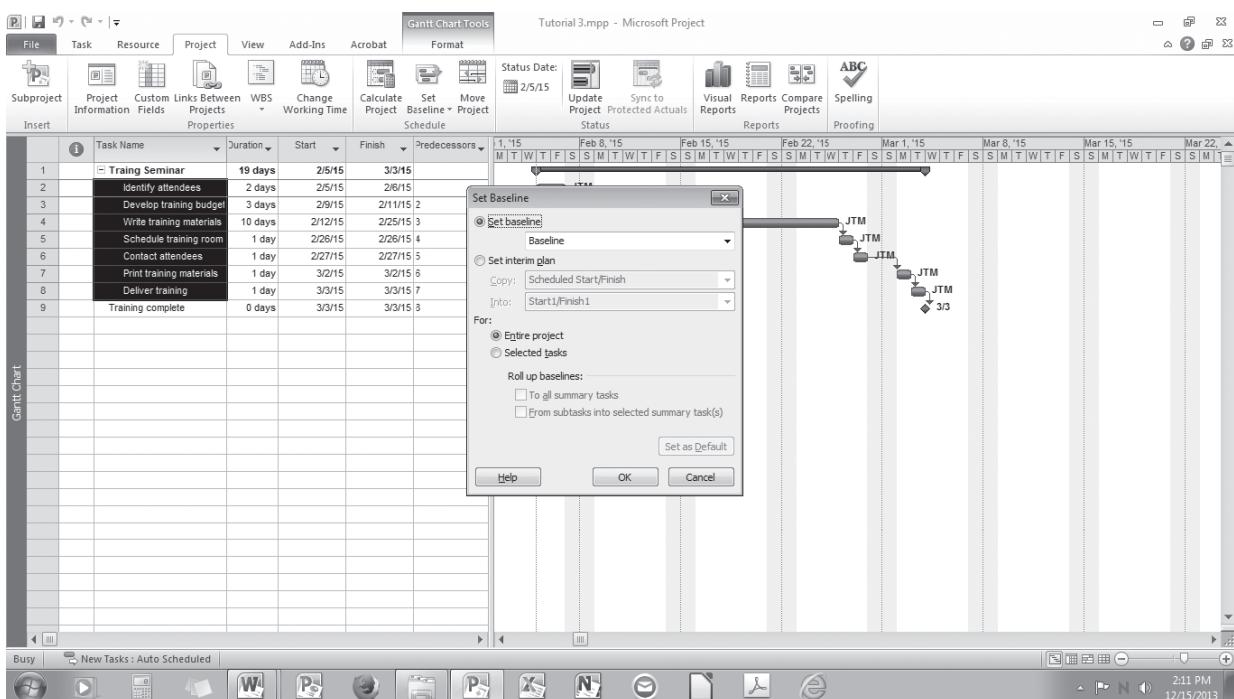
The baseline project plan is the plan that has been accepted by the project stakeholders and the one the project manager and project team will follow to complete all of the deliverables defined in the project scope plan. The baseline project plan also allows the project manager and other stakeholders gauge or benchmark the project's actual progress to the planned progress in the baseline plan. This allows everyone to know if the project is on-schedule or over budget.

Saving a baseline in MSP is like taking a snapshot of your project at a particular point in time. This allows you to compare what really is happening to what you planned to happen. Once you save a baseline in your project file, you can display baseline and actual data understand what actions, if any, need to be made to keep the project on track.

You can set a baseline for specific tasks by selecting them or for the entire project. To save a baseline, choose the **Set Baseline** icon from the Project Tab. As you can see in the figure below, you can also clear a baseline.



After you choose Set Baseline from the dropdown menu, a Set Baseline dialog box will appear. For now, we'll just click the OK button to set a baseline for the entire project.



YOUR TURN

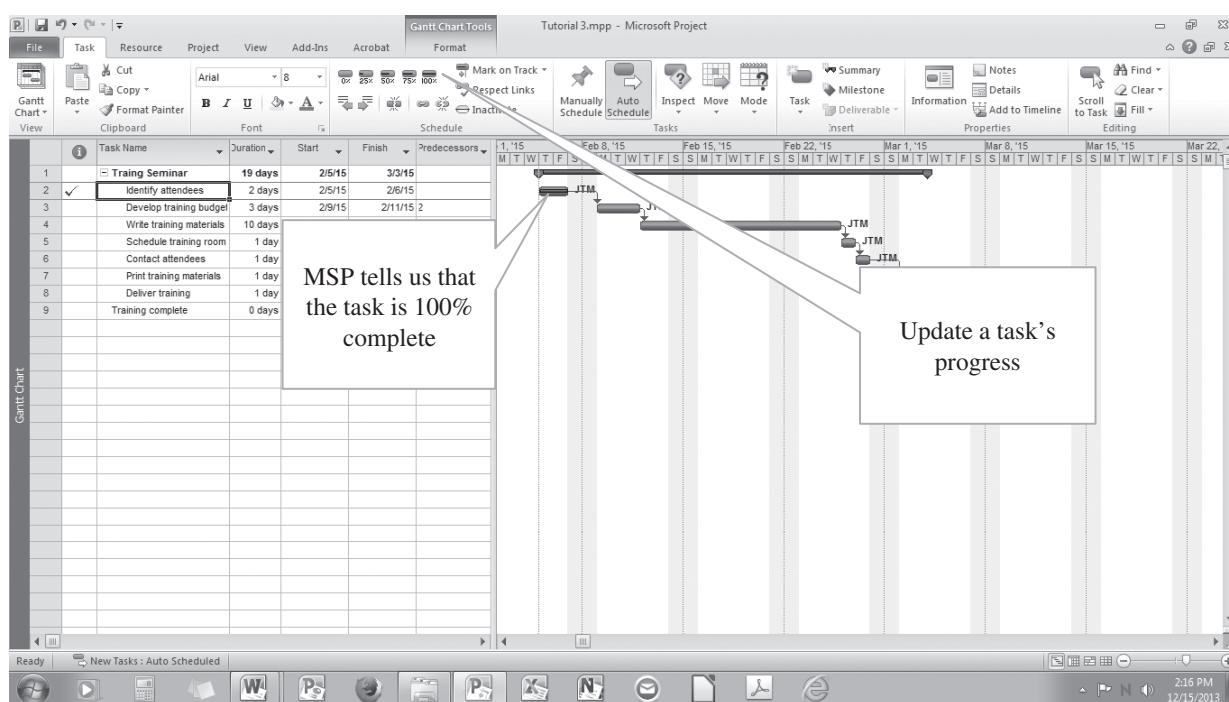
Let's assume that your project has been accepted and you are given the authority to begin work on the training seminar. If you haven't already, set a baseline for the entire project. Note that nothing in your project has changed visually, but you have completed a very important step in being able to track the project's progress.

Updating Progress

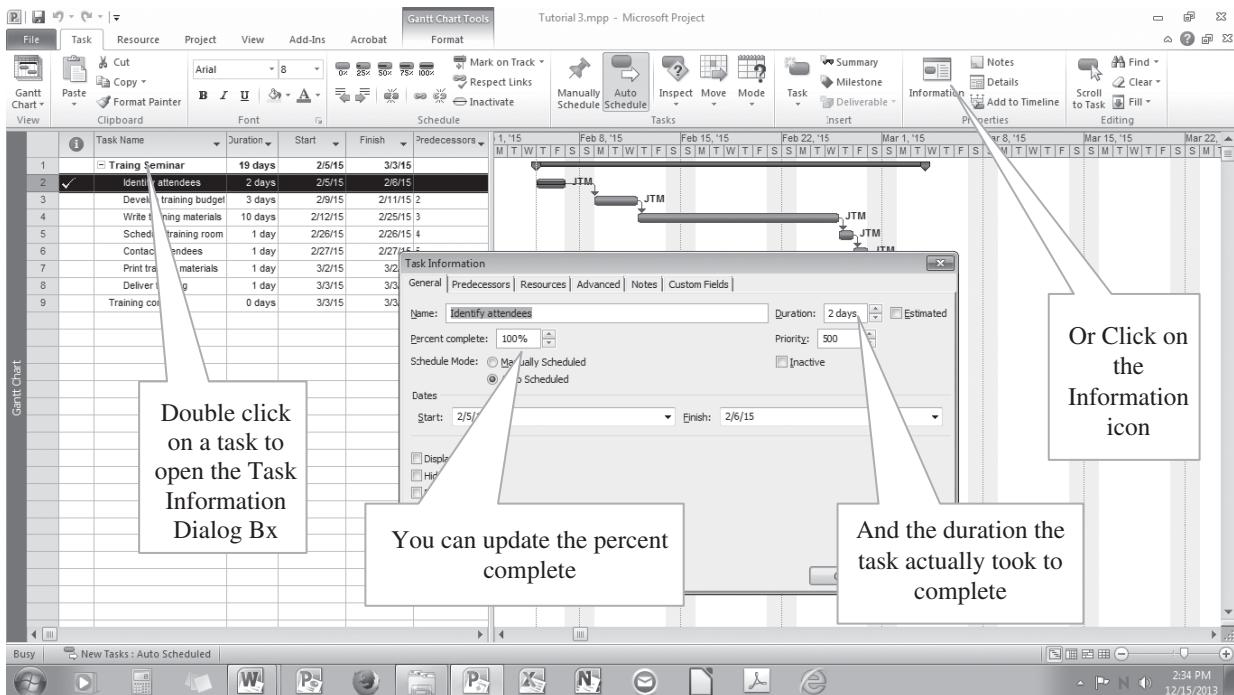
Now let's assume that you have started working on the project. Your job now is to track or keep a record of what activities or tasks are being completed. Stakeholders will want to know how you are doing. Using MSP provides a useful tool for keeping your boss informed.

There are several ways to track the project's progress. One of the easiest ways is to click on the Task Tab and then click the icon that best measures the task's progress. For example, let's say that the first task, Identify attendees, has been completed as planned. That means that the task was completed as expected so it started and ended as we planned and is entirely complete. Therefore, all we have to do is click on the task and click the 100% complete icon in the Task Tab.

As you can see, MSP10 places a bar throughout the Gantt Chart bar for that task.



Ok, but what about if a task takes longer than planned? Continuing with our example, let's say that the task is 100% complete but took more or fewer days to complete. Double click on the task or click on the Task icon under the Task ribbon to open the Task Information dialog box. Enter 100% for "Percent Complete" and the actual duration that the task took to complete. Then click the OK button to save this information.



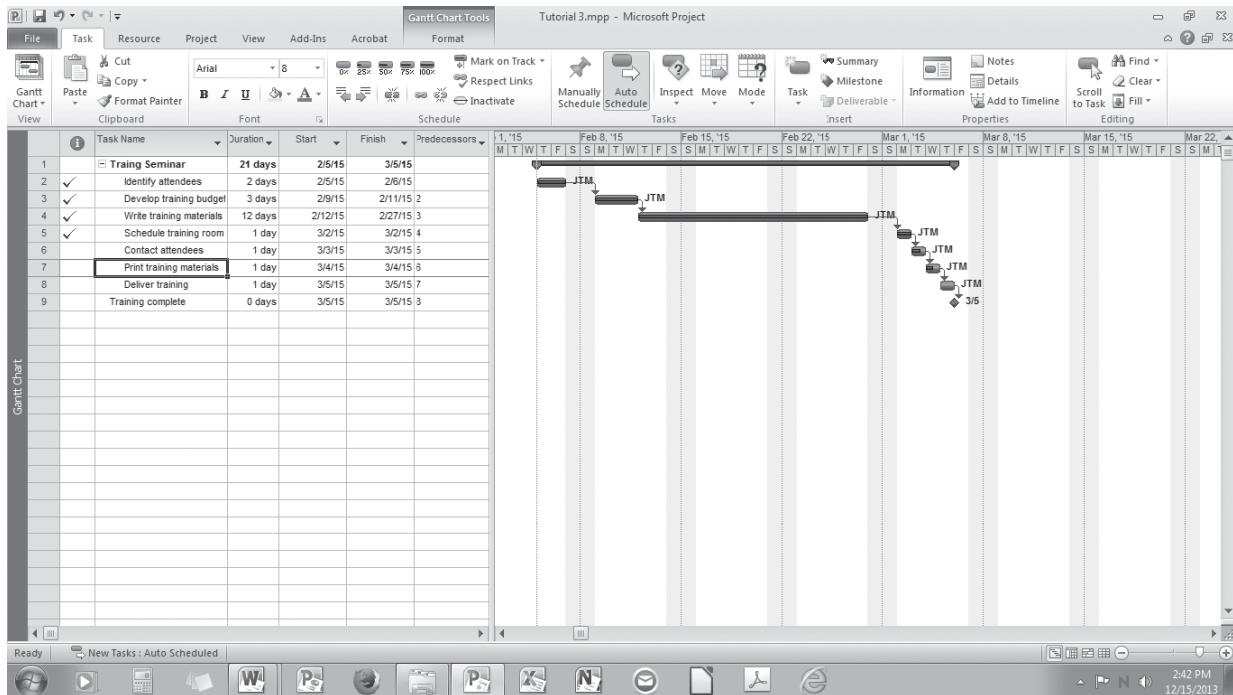
YOUR TURN

Click on the Task Ribbon and update the following progress:

Tasks	Percent Complete	Actual Duration
Identify Attendees	100%	2 days
Develop training budget	100%	3 days
Write training materials	100%	12 days
Schedule training room	100%	1 day
Contact attendees	75%	1 day
Print training materials	50%	1 day
Deliver training		

We'll also assume that the last task: *Deliver training* has not started yet, so there is no need to update that task right now.

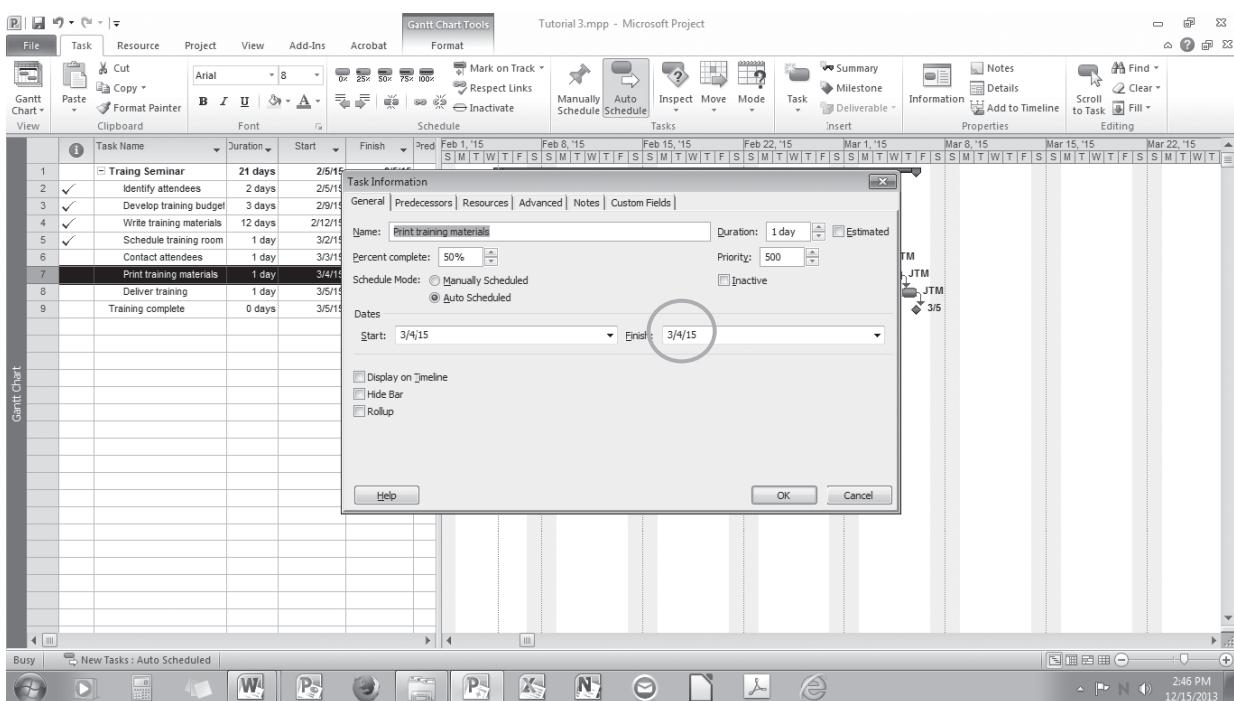
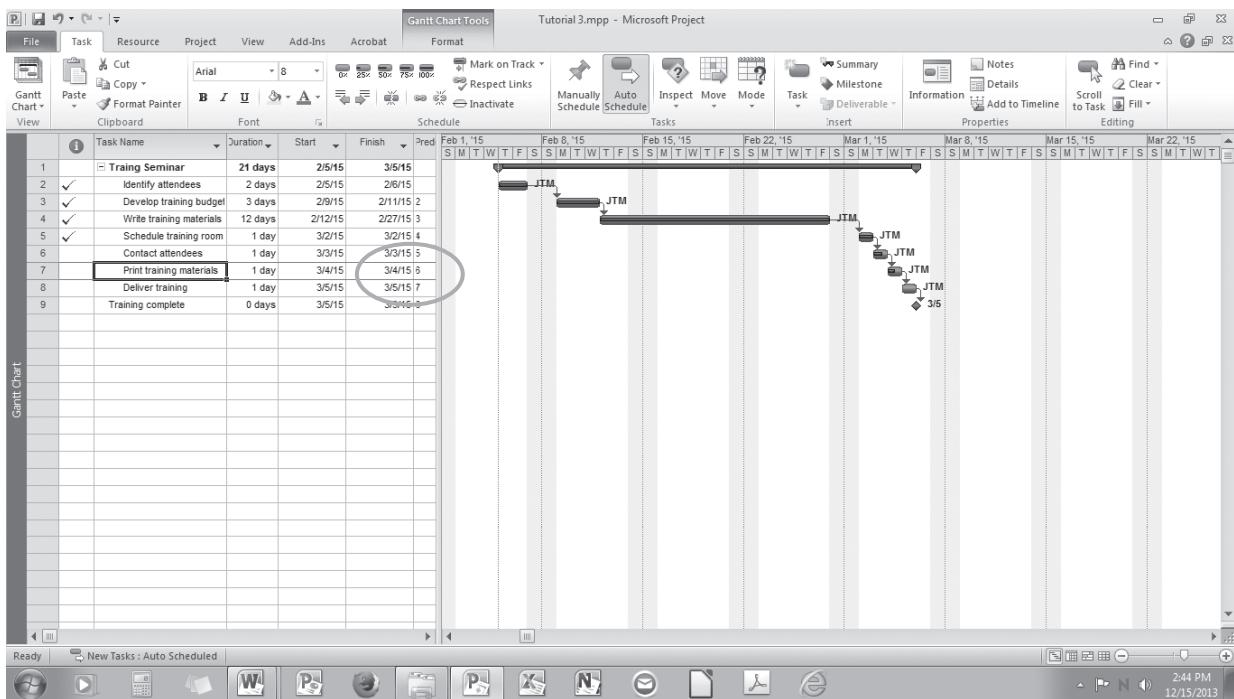
Your project should look similar to what follows:



Changing Dates

Sometimes you will need to change the current date and the status dates because MSP, by default, uses the current date on your computer. Let's say that we want to check our progress on a particular date—the day the task *Print training materials* is supposed to be completed. Since you will be working on a different time period than me, you can find out that date using a number of ways. For example, you could select the divider bar and move it to the right to see the start and finish columns, or you could double click on the *Print training materials* task to find this in the Task Information dialog box.

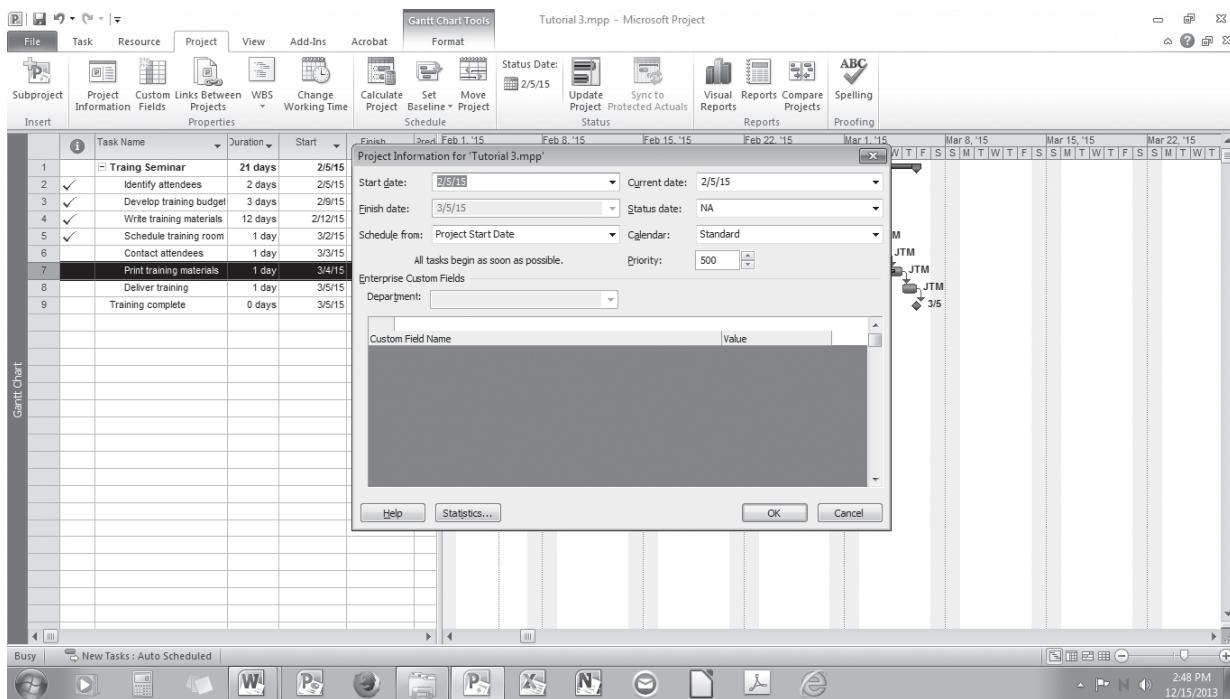
As you can see, the project plan in this example has the *Print training materials* task scheduled to start and end on March 4th.



YOUR TURN

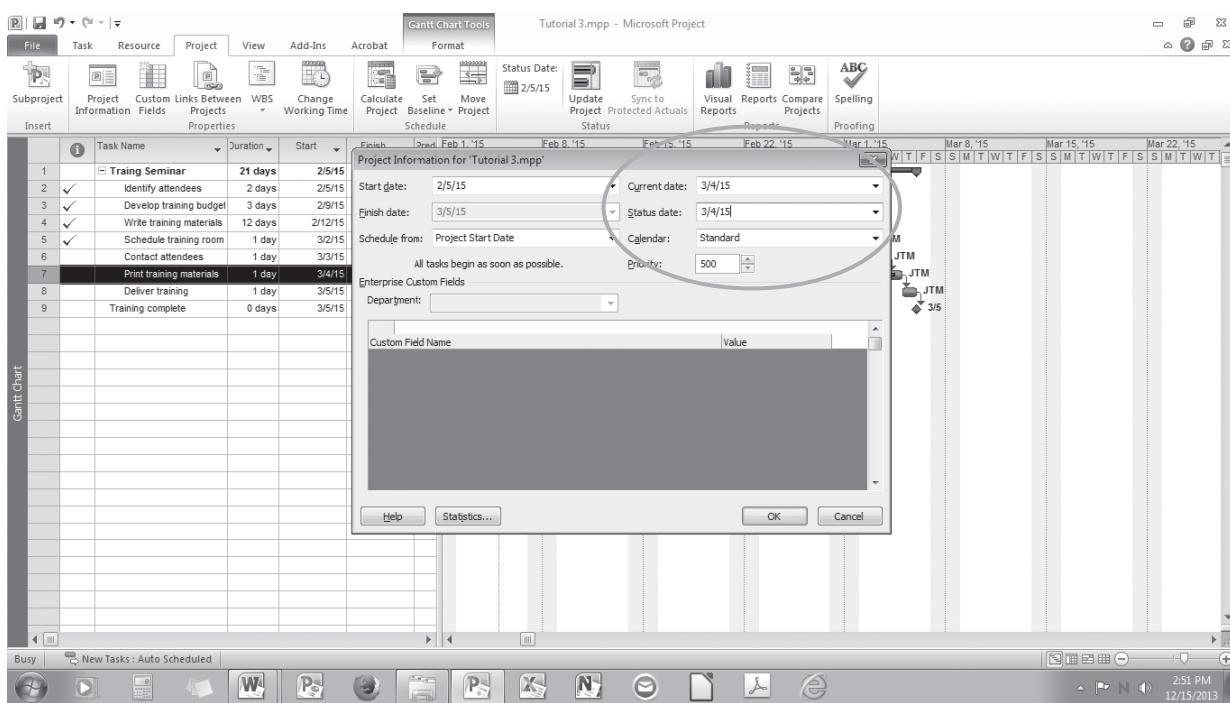
Find the start and finish date for the task Print training material for your project plan.

Now let's change the current and status date for our project to the date the task Print training materials is scheduled to start. Choose Project from the **Project Ribbon** from the menu. The Project Information dialog box will appear.



Change the Current date and Status date to the start date of Print training materials task as scheduled in your project.

*Click the **OK** button to save these changes. For my project plan, this will be March 4th.*

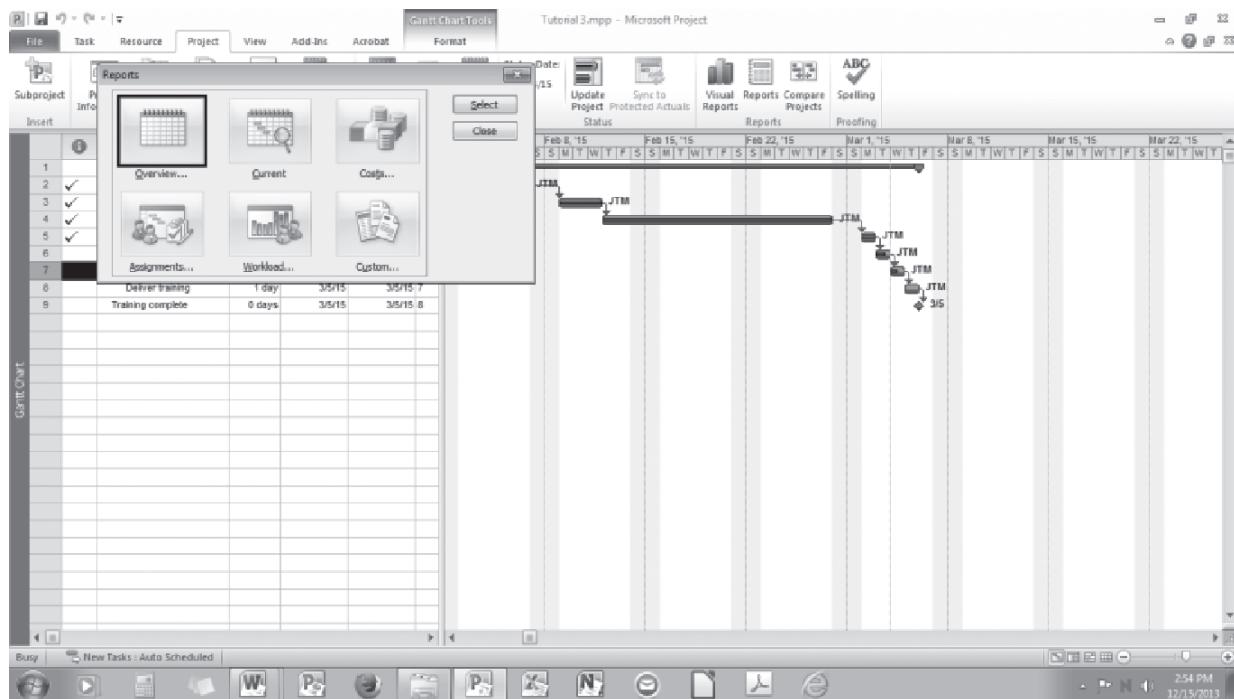


YOUR TURN

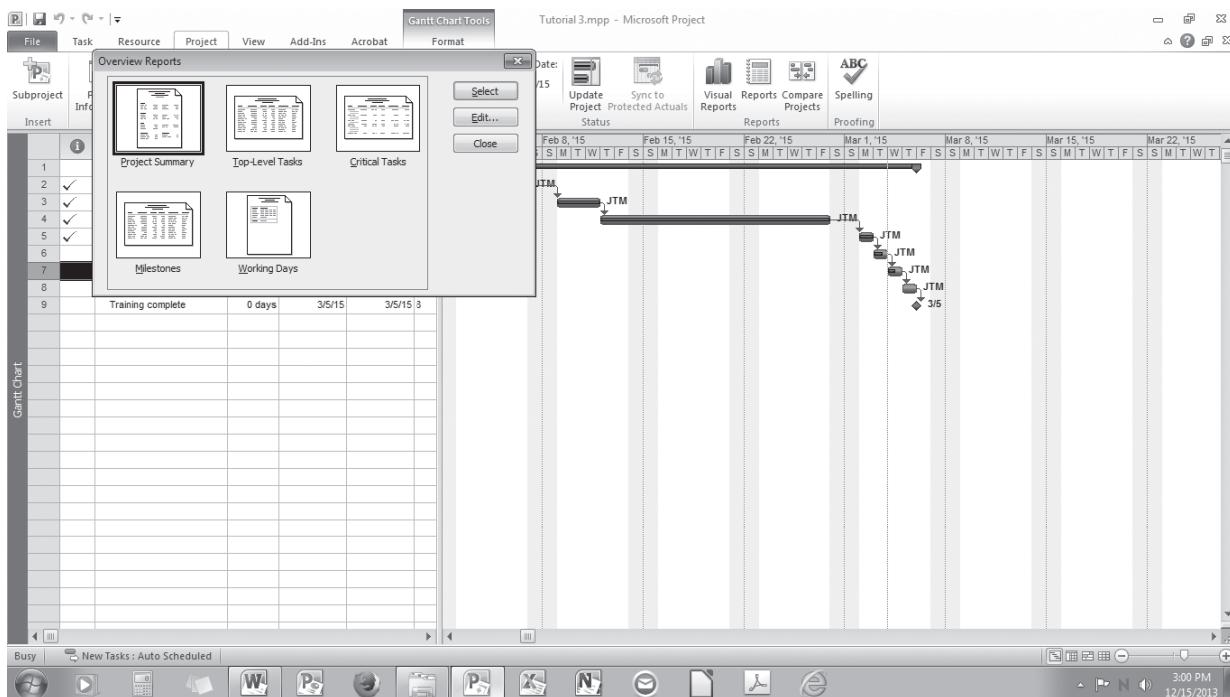
Go ahead and change the current date and start date of your project to the date the task Print training materials is scheduled to start and be completed.

Creating Standard Reports

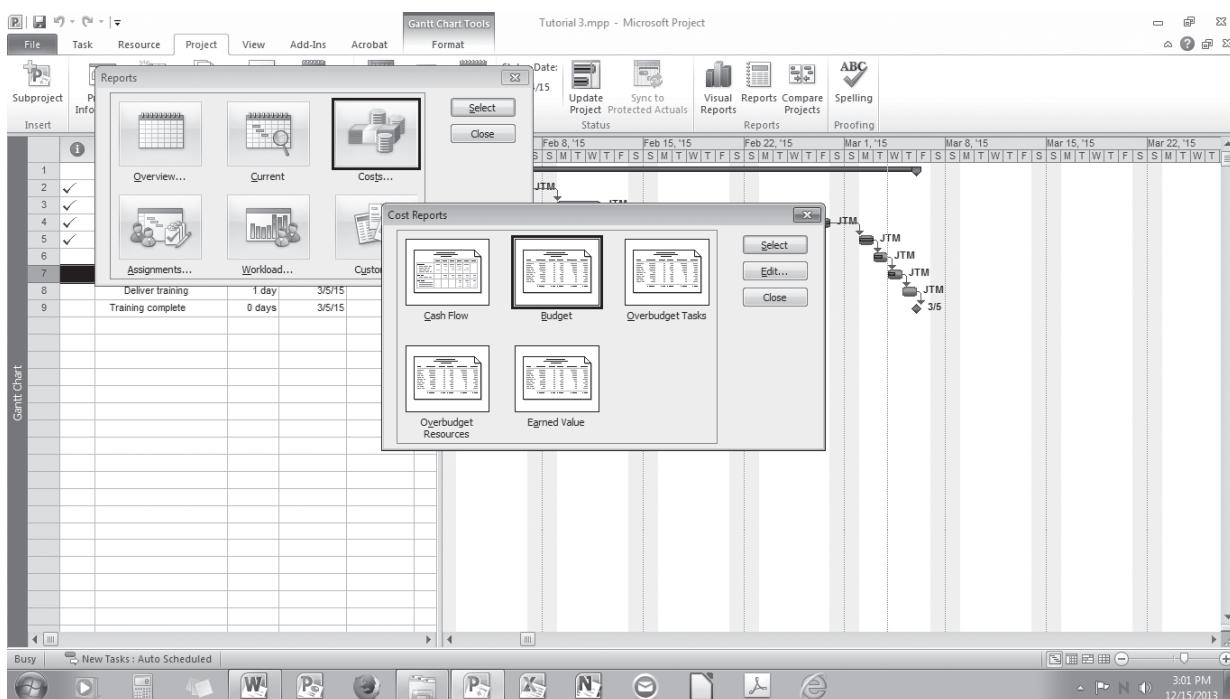
MSP provides a number of useful standard reports that are often referred to as “canned” reports and are right at your fingertips. Choose **Reports** from the **Project Ribbon** to open the Reports Dialog Box.

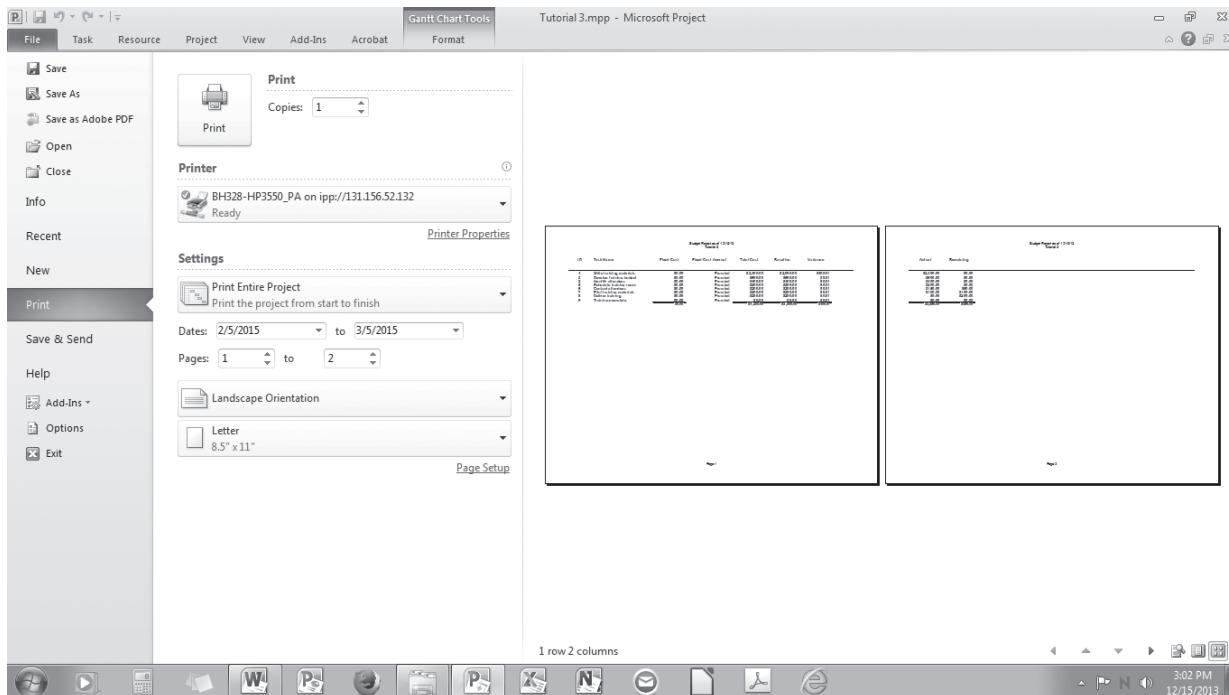


Choose Overview and click the select button to see the **Overview Reports**. In a previous tutorial you learned how to view and print the **Project Summary Report**.

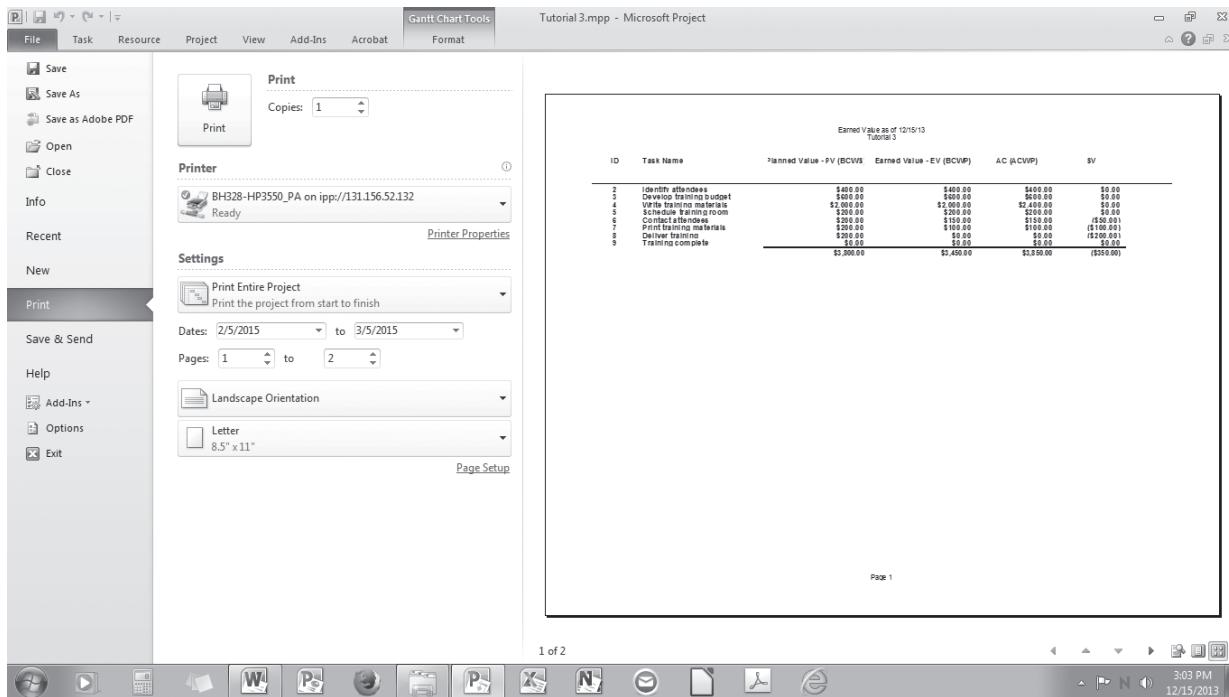


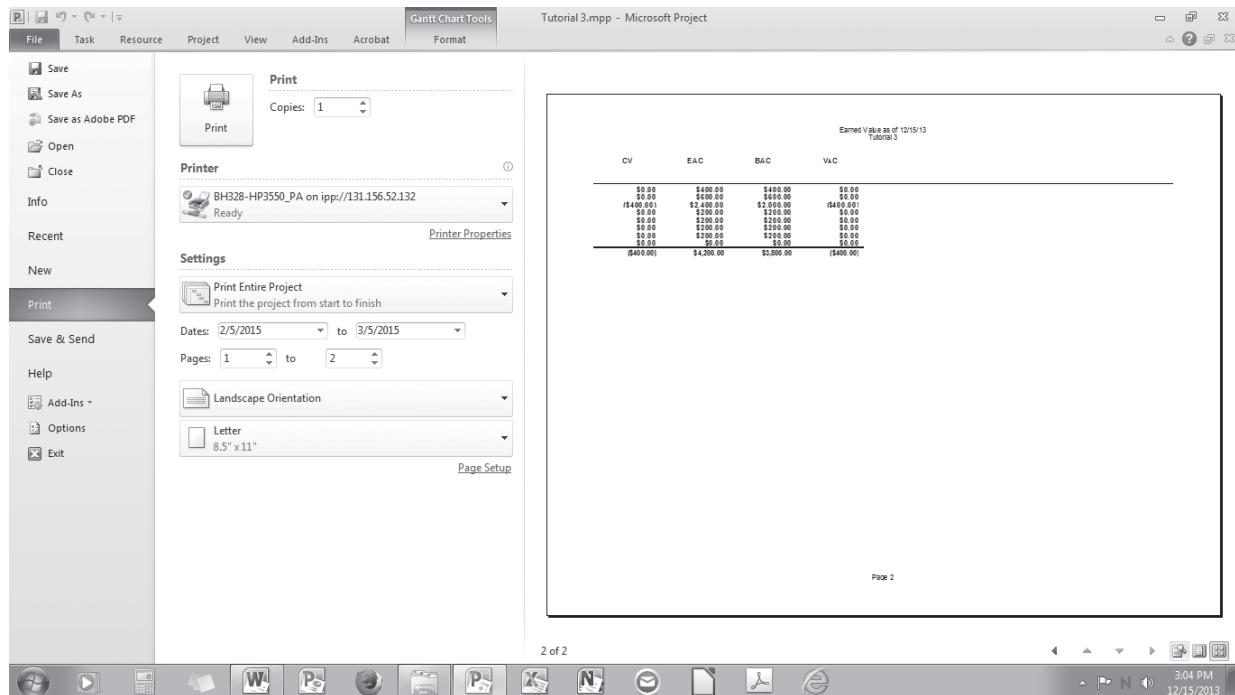
Another useful report is the **Budget report** under **Cost Reports**. As you can see (and might have expected), your project is over-budget.





One of the most useful reports, however, is the **Earned Value report** that can be found under the **Cost Reports**. As you can see from the discussion of earned value in the text, the project is behind in terms of both schedule and budget since the **SV** (schedule variance) and **CV** (cost variance) are both negative.





YOUR TURN

Become familiar with the various standard reports in MSP. You don't have to print them—just view them in Print Preview.