TEMPLATE
Always base your project schedules on template created from previous similar project
Always save template at the end of the project
PROJECT DESCRIPTION
Document the project code and brief description or Title in the File, Properties
Describe the project objectives and goals in the Subject and Comments section
SCHEDULING
Prefer to schedule using project start date even if you have a deadline to meet
Project Start Date or Finish Date are the only dates that you should enter in most cases
CALENDAR
Prefer to use Project Calendar supplied by the PMO in your organization
Capture all bank holidays and non working days are correctly
OPTIONS
Prefer to use Mon 28 Jan '02 date format
Use Project Summary Task to summarize the project Duration, Work, Cost and Dates
Use Fixed Work task type when adding or removing resource will change the duration
WORK BREAKDOWN STRUCTURE
Use Nouns to name the deliverables such as Architecture, Technical Design, Test Case
Use Verbs to name the tasks such as Write test cases, Review Code
Each Summary Task should at least have two detail tasks
SEQUENCING
Tasks that can start on project Start Date will not have any predecessor
Tasks that finish on the project Finish Date will not have any successor
Overlap tasks carefully as it may result into rework
Use relative lead or lag if possible
ESTIMATING
Use estimates from the previous similar project and tailor them if necessary
Use PERT estimates if not much is know and no previous data exists
Define the number of hours per day in the Options, Calendar tab
Define the number of hours per week in the Options, Calendar tab

CONSTRAINTS, DEADLINES AND TASK CALENDARS
Do not use Constraint as far as possible
Avoid using Must Start On and Must Finish On
Use Deadlines over Constraints
Use fewer Task Calendar as possible
RESOURCE
If you don't know the resource names than use generic names such as Engineer, Tester
Use generic or group resource to determine the require resource units to complete the task and or the project within a given duration
Define the group to which the resource belongs such as Testing, Management
COST
Use Ovt. Rate only if resource is paid for overtime and it is higher than the Std. Rate
Decide whether you will track billing cost or incurred cost
Decide which currency will be used
ASSIGNMENT
Assign your best resources to the critical path first
Try not to assign the same resource to the adjacent tasks on the critical path
Keep resource work load within 120% and 80% for optimal resource utilization
OPTIMIZING
Schedule tasks in parallel if you have resources
Assign critical and long duration tasks to best resources
Use additional resources if available (Crashing) or increase resource working hours
TRACKING
Always ensure to save a baseline
Update baseline if the targets are changed and approved; preserver the old baselines
Prefer updating tasks in the standalone version
Always set the Status Date and the Current Date for the reporting period
REPORTING
Agree the reporting requirement, format, frequency, medium and reporting period
Use Copy picture to Wizard to present data in other than Microsoft Project

Use quick links like Statistics, Progress lines to keep an eye on project progress
CLOSING
Analyze planned vs. actual performance
Archive project data and file
Distribute the template and customizations in the organization

CHECKLIST FOR EXCUTING THE PROJECT	
RESOURCE ASSIGNMENT	
Have you replaced the generic resource with actual resource?	☑
Are there any resource availability related changes to be made?	☑
STRATEGY	
Have you decided whether you will update Task or the Assignment?	☑
Have you decided how the Timesheets will be collected?	☑
Have you decided how often to update the data?	☑
PREPARING FOR UPDATES	
Have you collected the data in the agreed format?	☑
Check the Status Date and Current Date are set to the current reporting period?	☑
Have you selected and filtered the data you want to update?	☑
SETTING UP OPTIONS	
Have you set the Tab Calculation: Updating task status updates resource status?	☑
Ensure Move end of completed parts after status date back to status date	☑
Move start of remaining parts before status date forward to status date	☑
Move end of completed parts forward to status date	☑
UPDATING TASK	
Have you entered Actual and Remaining Duration for the tasks running behind?	☑
Do you need to reschedule work for any task?	☑
Are all Remaining Duration scheduled in the future?	☑
ROUTINE CHECKS	
What tasks are scheduled for today?	☑
Have you checked the readiness of the tasks starting today or tomorrow?	☑
Are there any tasks that are running behind?	☑

CHECKLIST FOR MONITORING AND CONTROLLING THE PROJECT	
ANALYZING	
Are we progressing as scheduled?	☑
How are we doing on the Critical Path tasks?	☑
Is the % Complete as expected and planned?	☑
Can something be done to bring the project back on track?	☑
REPORTING	
Have you presented the data in other applications if others don't have MSP?	☑
What is the latest forecast on Schedule, Cost and Work efforts?	☑
What are going to be end variances on Schedule, Cost and Work?	☑
CHANGE REQUEST	
Have you analyzed the impact for the received change requests?	☑
Is the revised schedule published and issued to all concerned people?	☑
Are you documenting the change request in the Project Summary Task?	☑
BASELINE	
Have you changed the Baseline after receiving an approved change request?	☑
Did you move the Baseline fields to Baseline 1 before saving the Baseline?	☑
Did you document the Baseline changes?	☑

CHECKLIST FOR CLOSING THE PROJECT	
Have you saved the project Template with and/or without the project data?	☑
Have you produced the project Metrics report?	☑
Did you review the Project Summary Report?	☑
Have you captured and documented the lessons learnt?	☑

PROJECTING it

CHECKLIST FOR CUSTOMIZING THE PROJECT	
GANTT CHART	
Have you formatted the Gantt Chart to display the Critical Path?	☑
Have you customized the Timeline to display the right tiers and time periods?	☑
Have you formatted the Milestone Task to stand out?	☑
Have you included the fields for Work and Cost?	☑
Have you distributed customizations to the PMO?	☑