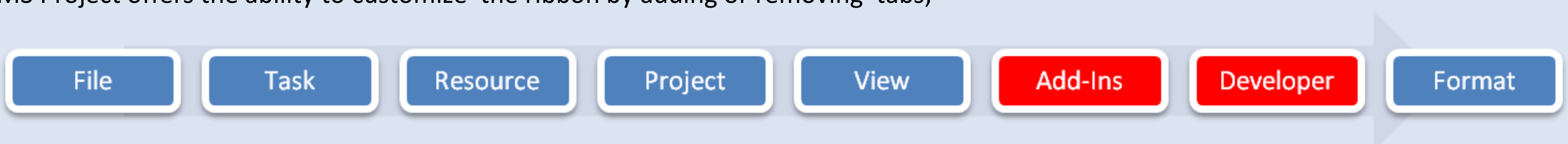
Project Management Quick Reference Guide

for MS Project 2010

Project 2010 offers flexibility and choice by providing tailored work management solutions for individuals, teams, and the enterprise. Besides providing a new and easier way to manage simple tasks and projects. Here are some of the MS Project Professional 2010 new Features:

- *The "Ribbon", no more menus, sub menus and or deeply hidden dialog box.*
- *The backstage, one location to access your files and the tools you need.*
- *Automatic and manual scheduled tasks options. Set up your task details when you are ready.*
- *What you want to see is what you get. Great Timeline view.*
- *Enhanced copy to and capability, preserve formatting from the source file.*
- *Custom fields.*
- *32-bit color support.*
- *Text wrapping.*
- *AutoFilter improvement.*
- *Save as PDF, XPS.*
- *Team planer where you can allocate your resources by dragging and dropping.*
- *Extended right click menu.*
- *Creating reports and gathering project information are much easier and quicker.*
- *Customizable QUICK Access tool bar.*
- *Dozens of ready-to-use format*
- *Inactive tasks, where you can disable tasks without affecting your entire project.*
- *Perfect integration with SharePoint 2010.*

MS Project offers the ability to customize the ribbon by adding or removing tabs;



1 Start a new project

Before beginning a new project, an organization must determine whether the project fits its strategic goals. Executives should classify proposed projects that focus on mission-critical activities as high-priority and projects that are peripheral to organization goals as lower priority.

Before work begins, an executive sponsor should be identified. The organization should complete a high-level evaluation of the project's business case, its limitations, and its technical and financial requirements.

Finally, a project manager should be identified, who can then set up a project plan in Microsoft Office Project 2010.

Need a more detailed guide to project management with Project 2010? GO to MS Project 2010 .

1. **Create a new project file**
   - To create a new blank project in MS Project 2010, click the **File** tab >> **New >> Blank Project**.
   - To create a new project from a template in MS Project 2010, click **File** tab >> **New >> Office.com Templates** tab. Click the template that you want. You can also search office.com for templates.

2. **Set the project start date** — On the **Project** tab, click **Project Information**. In the **Start date** box, enter your project start date.

3. **Define the project calendar** — On the **Project** tab, click **Change Working Time**. Identify working and non-working days and times for your project.

4. **Save the project file** — On the **File** tab, click **Save**. In the **File name** box, type the project name.

2 Plan the tasks

In the planning stage you identify the project's milestones, deliverables, and tasks. This plan can be your Work Breakdown Structure (WBS). You develop and refine the schedule, and identify the resources required to implement the project.

1. **Enter tasks** — Click the **Task** tab. In the **Task Name** field, enter tasks. Tasks can also include summary tasks, milestones, and WBS items.

2. **Outline tasks** — Create your task hierarchy, including tasks and milestones under summary tasks, which can represent phases or other work divisions. Click a task (or several tasks), and then click the **Indent** or **Outdent** button on the toolbar.

3. **Enter durations** — Click the Duration field for a task and enter duration; for example, type 4d to indicate 4 days. To specify a milestone without duration, type 0d. To indicate that a duration is an estimate, add a question mark; for example, type 6d?

   Note MS project 2010 provides you the ability to leave the duration, start, or finish dates blank, and give you to set them as information available.

4. **Link tasks to show relationships** — Select the tasks that you want to link, and then click the **Link Tasks** button on the Ribbon- Task tab. This will set e the default finish-to-start dependency type.

3 Assign resources

Assignments are the associations between specific tasks and the resources needed to complete them. You can assign more than one resource to a task. In addition to work resources (people), you can assign material resources (such as cement) and cost resources (such as travel) to tasks.

1. **Define the resource pool**

   On the **View** tab, click **Resource Sheet**. In the **Resource Name** field, type the names of the resources you will use for this project. You may enter the data of the other fields latter.

2. **Assign resources to tasks**

   On the **Resource Tab**, select a task to which you want to assign a resource. Click the **Assign Resources** button. In the **Assign Resources** dialog box, click the resource names, and then click **Assign**.

   You can also assign resources to tasks by selecting the resource name form the drop down list in the resource names column.

3. **Enter the amount of work resources spend on tasks**

   When scheduling tasks, project managers sometimes prefer to enter the amount of work (or the amount of labor) needed to complete a task, rather than the duration for the task. Entering work reflects real-world scheduling.

   To enter work hours for resources assigned to tasks, add the Work column to the Gantt Chart view. On the **Insert** menu, click **Column**.

4. Know your task type

As soon as you assign resources, Project 2010 determines how to schedule the task based on the task type. You might actually see durations change as resources are assigned to tasks.

How task types work

Work, duration, and units (% allocation) are determined by the formula: **Work = Duration * Units**.

In a . . .	If you revise work . . .	If you revise duration . . .	If you revise units . . .
Fixed units task	Duration changes	Work changes	Duration changes
Fixed work task	Duration changes	Units change	Duration changes
Fixed duration task	Units change	Work changes	Work changes

- To set a default task type for the entire project, click **File** tab >> **Options** , and then click the **Schedule** tab. In the **Default task type** box, select **Fixed Units** (the default), **Fixed Duration**, or **Fixed Work**.
- To change the task type for an individual task, select the task, and then click the **Task Tab** >> **Task Information** button. Click the **Advanced** tab, and then in the **Task type** box, click the task type that you want to create.

4 Set the project baseline

Create a baseline or an interim plan so that later you can compare your up-to-date schedule to your baseline. Saving a baseline plan enables you to identify and solve discrepancies and plan more accurately for similar future projects.

1. Save the baseline plan	After your project plan is solidly in place for the finish date, budget, and scope, you can submit the plan for approval. Once it has been approved, save the baseline plan. On the **Project Tab**, click **Set Baseline**. You can save up to 11 baselines.
2. View baseline data in a Gantt Chart view	On the View tab, click Tracking Gantt. In the chart area, the baseline information is shown as the lower of the two Gantt bars for each task.
3. View baseline data in a table	On the **View** tab, point to **Table**, and then select **Variance**. This table includes fields for baseline and variance start and finish.

5 Update progress

Updating the progress of your project is the only way to make sure it stays on track as work is performed. The focus at this point is on managing changes, updating the schedule, tracking progress, and communicating project information.

Project 2010 tracks three sets of dates: current, baseline, and actual. When you first set the baseline, current = baseline. When a task is 100% complete, current = actual. Baseline, current, and actual values exist for the start date, finish date, duration, cost, and work.

1. Manage changes

Managing changes involves modifying durations, dates, dependencies, resource assignments, or tasks based on requested changes or new information. Keep the current fields up to date and compare them to the baseline.

2. Track actual dates and durations

It's best to decide on a single method for tracking progress. You can enter percentage complete, actual start and finish dates, actual and remaining durations, or actual and remaining work.

Select the task for which you want to enter actual progress. On the **Task tab**, point to **Schedule group**, and then click **Mark on Track** right arrow >> **Update Tasks**. In the **Update Tasks** dialog box, enter progress data in the fields that match your tracking method.

3. Track actual hours and costs

If you want to enter actual and remaining work hours or costs, use the tracking table. On the **View** tab, point to **Table**, and then click **Tracking**. Enter progress data in the **Act. Work** or **Act. Cost** fields for the task.

You can also use the tracking table to enter percent complete, actual start and finish dates, and actual and remaining duration.

6 Report project information

Keep stakeholders and team members up-to-date on project progress by providing them with access to online or printed views and reports.

Project 2010 provides many ways to print and distribute both detailed and overview information project information quickly and efficiently.

1. **Format a view for printing**	On the **Format** tab, click **Text Styles** or **Bar Styles** to set up styles that will apply to multiple tasks. Or, on the **Format** group, click **Font** or **Bar** to format individual elements for a specific task. Click **Timescale**, **Gridlines**, or **Layout** on the **Format** tab to change those aspects of the current view.
2. **Print a view as a report**	Set up the current view the way that you want it to look when printed. On the **File** tab >> **Print**, set up printer properties or change the page view then click print to print the view.
3. **Generate a report**	On the **Project tab >> reports group**, click **Visual Reports** to see your project's data in PivotTable reports in Microsoft Office Excel and Pivot Diagram views in Microsoft Office Visio Professional. You can also view basic reports that don't require Excel or Visio. Click **Reports**. Double-click a report category, and then double-click the predefined report. Enter any requested information. A preview of the report appears. To print the report, click **Print**.
4. **Add a field (column) to a table**	Click anywhere in a column to the left of where you want to insert a new column.
5. **Customize views**	On the **View** tab, click **More Views**. Click **New** or **Edit**. In the **View Definition** dialog box, specify the table, group, and filter that you want to use to define the view.
6. **Customize tables**	On the **View** tab, point to **Table**, and then click **More Tables**. Click **New** or **Edit**. In the **Table Definition** dialog box, specify the information that you want to include in the table.
7. **Customize groups**	On the **View** tab, point to **Data** >> **Group by**, and then from the drop down list Click more groups. Click **New** or **Edit**. In the **Group Definition** dialog box, specify how you want to group project information.
8. **Customize filters**	On the **View tab,** point to **Filter** and then select **More Filters** from the drop down list. Click **New** or **Edit**. In the **Filter Definition** dialog box, specify how you want to filter project information.

7 Close the project

Just because your project is almost finished doesn't mean that your work is done. You still need to resolve any final project details and obtain customer acceptance of final deliverables. Conduct a "lessons learned" session, recording information about areas for improvement and best practices. Make any final updates to the project plan. Finally, archive the project plan according to your organization's guidelines.

1. **Save a project as a template**

After completing a project, you should leverage what you've learned in the project by making it a template for future projects. On the **File** tab, click **Save As**, and then in the **Save As Type** box, click **Template**.

Please refer to Microsoft Project 2010 step by step tom get the maximum and to be MS Project 2010 Expert.

References:

Microsoft Project 2010 step by step…By Carl Chatfeld and Timothy Johnson

http://www.microsoft.com/learning

www.microsoft.com/project

Amr Miqdadi, *PMP, MCSE*

amiqdadi@pmlead.net

www.pmlead.net