Project Management Quick Reference Guide

for Project 2010

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 Project 2010.

1. **Create a new project file**
   - To create a new blank project in Project, click the **File** tab. Click **New**, and then click **Blank Project**.
   - To create a new project from a template, click the **File** tab. Select a template from **Templates** (local), **Office Online Templates** (Web), or **Project Server Templates**.

2. **Set the project start date**

   Click the **File** tab, and then click **Info**. On the right side of the Information page, select a date in the **Start Date** box.

3. **Define the project calendar**

   Click the **Project** tab. In the **Properties** group, click **Change Working Time**. Identify working and non-working days and times for your project.

4. **Save the project file**

   click the **File** tab. Click **Save**. In the **File name** box, type the project name.

   If you are publishing the project to Microsoft Office Project Server 2010, type the name of the project and include any values for custom fields that are required by your organization.

2 Plan the tasks

In the planning stage, you devise a workable scheme to accomplish the project's goals. To do this, 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 **View** tab. In the **Task Views** group, click **Gantt Chart**. In the **Task Name** field, enter tasks. Tasks can also include summary tasks, milestones, and WBS items.

2. **Decide how you want to schedule tasks**

   In Project 2010, you can now schedule tasks manually in addition to having Project automatically schedule them. Select the scheduling method after you enter a new task by clicking one of the following in the **Task Mode** column:

   - **Manually scheduled** With this method, Project won't move a task after it is created, even when resources are assigned to it, or tasks get linked to **it**, or if the Project calendar changes. New tasks are manually scheduled by default.
   - **Auto scheduled** Use this method when you want Project to schedule the task based on dependencies, constraints, calendars, and other factors.

   Note New tasks are manually scheduled by default. To make new tasks automatically scheduled by default, click the **Tasks** tab. In the **Schedule** group, point to **Task Mode**, and in the list, click **Auto Schedule**.

3. Outline tasks

Create your task hierarchy, including tasks and milestones under summary tasks, which can represent phases or other work divisions. Click the **View** tab. In the **Task Views** group, click **Gantt Chart**. Select a task (or several tasks), and then in the **Tasks** group, click the **Indent** or **Outdent** button .

Tip If you created a summary task with a duration, start date, or finish date, then the tasks that fall under the summary task will not be rolled up to this summary task. They'll be independent of it. This is known as top-down scheduling.

4. Enter durations

Click the **Duration** field for a task and enter a duration. For Project 2010, you can enter duration in two different ways, depending on the scheduling method that is being used for the task.

- **Manually scheduled task** Enter duration as either a number or as text. For example, you can enter "Sometime after June," or "Two days after ship."
- **Auto scheduled task** Enter duration as a number. 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 When using automatic scheduling, avoid entering start and finish dates for tasks. Instead, enter duration and let Project 2010 automatically set these dates, which might change anyway as resources are assigned to tasks.

5. Link tasks to show relationships

Click the **View** tab. In the **Task Views** group, click **Gantt Chart**. Select the tasks that you want to link, and then click the **Link Tasks** button in the **Tasks** group, which is found under the **Tasks** tab. To change the default finish-to-start dependency type, double-click the line between the tasks that you want to change, and then select a task link from the **Type** list.

6. Create deliverables

After your project is underway, you might learn that other projects depend on your project as a deliverable. Click the **View** tab. In the **Task Views** group, click **Gantt Chart**. On the **Task** tab, in the **Insert** group, click **Manage Deliverables and Dependencies** . This feature requires Project Professional 2010 that is connected to Project Server 2010.

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. Add resources to your project

Click the **View** tab. In the **Resource Views** group, click **Resource Sheet** . In the **Resource Name** field, type the names of the resources you will use for this project.

If you are using Project Professional, you can add resources from the enterprise resource pool. Click the **Resources** tab. In the **Insert** group, click **Add Resources**, and then click **Build Team from Enterprise**. This feature requires Project Professional 2010 that is connected to Project Server 2010.

2. Assign resources to tasks

In the Gantt Chart view, select a task to which you want to assign a resource. On the **Resources** tab, in the Assignments group, click **Assign Resources** . Click the resource names, and then click **Assign**.

Tip Use the new Team Planner to drag and drop tasks around easily from one person to another within your team, or back and forth in the schedule. Click the **View** tab. In the **Resources** group, click **Team Planner**. You can even create new tasks on the Team Planner, or remove tasks—by just dragging or dropping.

3. Enter the work hours 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. Right click a column, and then click **Insert Column**. Type "Work"**,** to select the Work column.

4. Know your task type

As soon as you assign resources to automatically scheduled tasks, Project 2010 determines how to schedule the task based on the task type. (Manually scheduled tasks don't use task types.) Durations might change as you assign resources 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 the **File** tab, and then click **Options**. 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, click the **Task** tab, and then in the **Properties** group, click the **Task Information** button . Click the **Advanced** tab, and then in the **Task type** box, click the task type that you want to create.

5. Identify factors affecting task schedules

You can use Project 2010 to help you understand how changes to one task can affect the rest of the project. Click the **Task** tab, and then in the **Schedule** group, click **Inspect Task**. A pane opens on the left showing the factors that affect the scheduling of the selected task.

Tip You can also see task scheduling information (such as scheduling mode, duration, and start and stop times) quickly by hovering the mouse over the task's Gantt bar.

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. Click the **Project** tab, in the **Schedule** group, click **Set Baseline**.

2. **View baseline data in a Gantt Chart view**

   Click the **View** tab, and then click the **Gantt Chart** button. Click the **Format** tab, and then in the **Bar Styles** group, click **Baseline**. the baseline information is shown as the lower of the two Gantt bars for each task.

3. **View baseline data in a table**

   Click the **View** tab. In the **Task Views** group, click **Gantt Chart** (or any view that includes columns). Point to **Tables**, 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.

Note 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**

   It's best to decide on a single method for tracking progress. You can enter percentage complete, actual

durations

start and finish dates, actual and remaining durations, or actual and remaining work.

Click the **Task** tab, and select the task for which you want to enter actual progress. In the **Tasks** group, select the amount of progress done on the task 

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3. Track actual hours and costs

If you want to enter actual and remaining work hours or costs, use the tracking table. Click the **View** tab. In the **Data** group, point **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 View or report 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. Select a view

Project 2010 has some old views and some new views to help you see project information and report it to others on your team or organization. Click the **View** tab. In either the **Task Views** group or the **Resource Views** group, select the view you want to use. There are many views, but the most useful ones include:

- **Team planner view** Move tasks easily from one person to another within your team, or back and forth in the schedule. You can create new tasks in the team planner or remove tasks—just by dragging them.
- **Timeline view** Place tasks, subtasks, or milestones onto a single timeline at the top of most views. You can copy the timeline into Word, PowerPoint, Excel, or Outlook. You can instantly create attractive project reports this way. Click the **Timeline** check box to see how the timeline works.
- **Gantt Chart view** View project tasks in a combination view, with columns on one side and bars along a timeline on the other side.
- **Calendar view** See project information in a familiar monthly or weekly calendar format that can

be printed.

2. Add a column	Adding columns to a view is one of the easiest ways to create the view that meets your needs. Click the **View** tab. In either the **Task Views** group or the **Resource Views** group, select the view you want to use. Right click on a column header to the left of where you want to insert a new column, and then click **Insert column**. Type the name of the column you want to insert. **Tip** You can also insert a custom column as easily as a built-in column**.** For example, if you want a column called "Deliveries", type that name when you insert a new column. If you want the new column to contain only numbers (to specify the number of deliveries), then right click the column down-arrow, point to **Data Type**, and select the type of data that the column should contain.
3. Customize a view	Customizing views beyond adding columns has been made considerably easier in Project 2010. Whether it's the Team Planner, Timeline, or classic Gantt Chart, all formatting options are available on the **Format** tab. Select the view you want to customize, and then on the **Format** tab click the type of view element you want to change, such as the bar styles on the Gantt Chart, callout text on the Timeline, or the gridlines and timescales of any views. **Tip** If you want to filter, sort, or group tasks prior to printing, Click the **View** tab, and then in the **Data** group, click the **Sort**, **Filter**, or **Group** options.
4. Print a view or report	Set up the current view the way that you want it to look when printed. Click the **File** tab, and then click **Print**. A preview of the view will be printed appears on the right. **Tip** Click in the preview part of the view to see the actual size of the view as it will be printed.
5. Generate a report	Click the **Project** tab, and then in the **Reports** group, click one of the following: • **Visual Reports** Use visual reports to see your project's data as a PivotTable report in Excel 2010 or a PivotDiagram view in Visio Professional 2010. • **Reports** Use basic reports to see your project's data in tabular reports that don't require Excel or Visio. These basic reports are collected in categories for easy selecting and printing.

- **Compare Projects** Use a compare projects report to view a report that displays changes in the current project compared to another project.

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. Create a final report

Click the **Project** tab. In the **Reports** group, click **Visual Reports** to see your project's data as a PivotTable report in Excel 2010 or a PivotDiagram view in Visio Professional 2010.

You can also view basic reports that don't require Excel or Visio. Click the **Project** tab, and in the **Reports** group, 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**.

2. 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. Click the **File** tab, click **Save As**, and then in the **Save As Type** box, click **Template**.