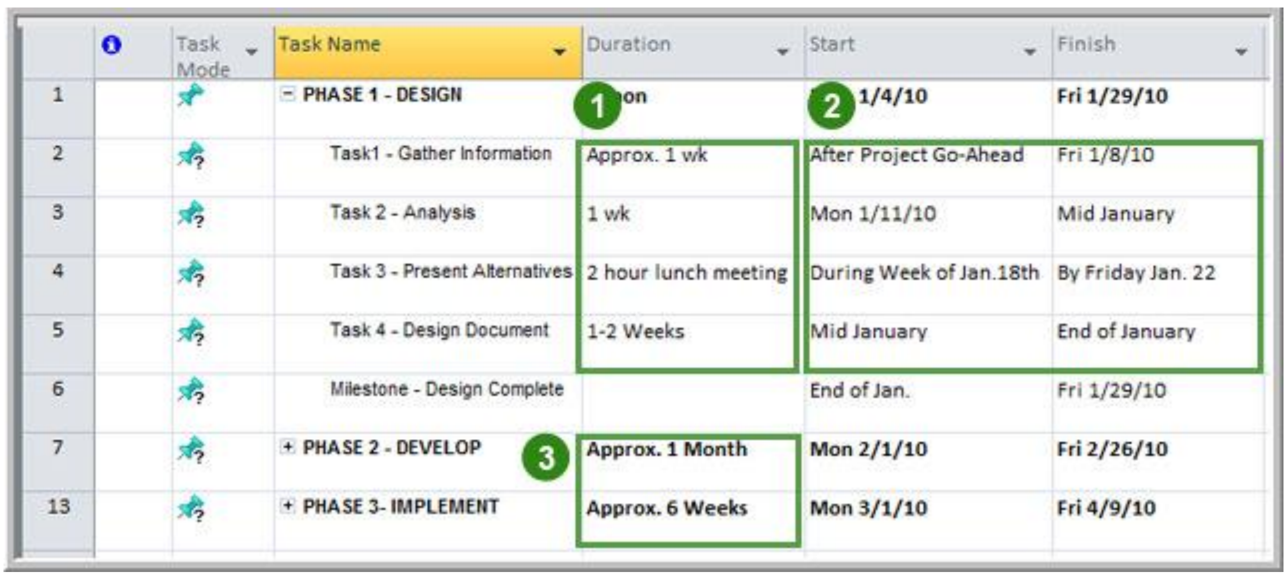
Easier Planning with User-Controlled Scheduling

Planning your project has never been easier. User-controlled scheduling in Microsoft® Project Professional 2010 puts you in control and brings together the flexibility and ease of a tool like Microsoft Excel® 2010 with the power of the Project scheduling engine. Choose the level of detail that is right for each project. Work with summary data initially or drill down into details for more complex phases or projects. This is particularly useful early in planning when details are still unclear or a little fuzzy.

Step 1: How Long Will It Take?

For duration estimates, enter information directly into the Duration column. For example, type approx. 1 month or 2 weeks assuming no customization, or enter more traditional estimates such as 1 day, 1 week, or 1 month.



		Task Mode	Task Name	Duration	Start	Finish
1			− PHASE 1 - DESIGN	1 on	2 1/4/10	Fri 1/29/10
2			Task1 - Gather Information	Approx. 1 wk	After Project Go-Ahead	Fri 1/8/10
3			Task 2 - Analysis	1 wk	Mon 1/11/10	Mid January
4			Task 3 - Present Alternatives	2 hour lunch meeting	During Week of Jan.18th	By Friday Jan. 22
5			Task 4 - Design Document	1-2 Weeks	Mid January	End of January
6			Milestone - Design Complete		End of Jan.	Fri 1/29/10
7			+ PHASE 2 - DEVELOP 3	Approx. 1 Month	Mon 2/1/10	Fri 2/26/10
13			+ PHASE 3- IMPLEMENT	Approx. 6 Weeks	Mon 3/1/10	Fri 4/9/10

Step 2: When Will It Start or Finish?

Enter start and finish dates directly in the Start and Finish columns. For example, type 1 week after delivery, 1 month before installation, or Order material 10 days before groundbreaking.

Step 3: Enter High-Level Phase/Summary Estimates

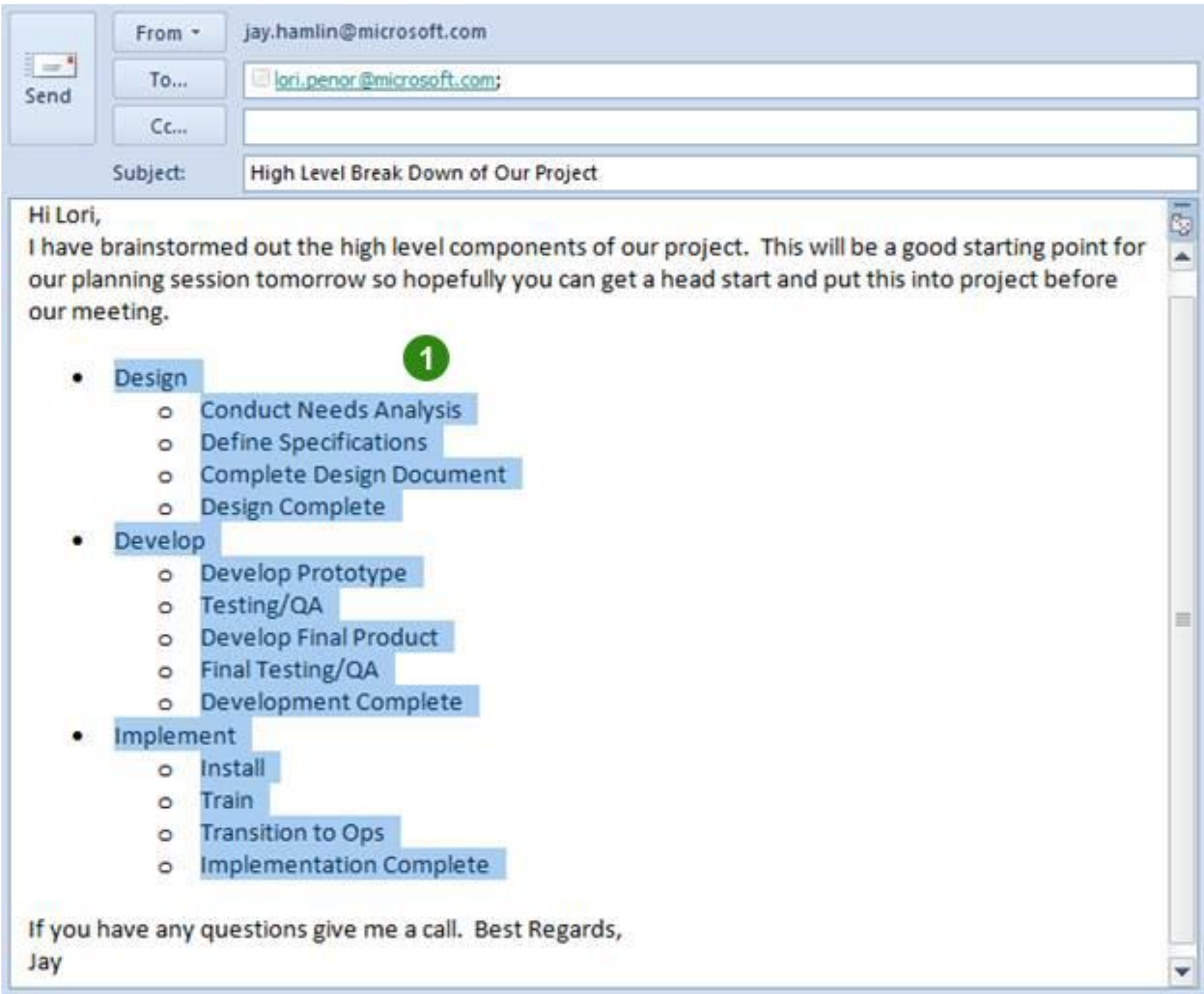
You also have the option of entering estimates at the summary task or phase level without being affected by rollup calculations of related (indented) detail tasks below the summary or phase level. This makes it easy to do high-level estimating and top-down scheduling.

Enhanced Copy & Paste

Copy and paste is still alive and well. In fact, it is even better than ever with Project Professional 2010 as you can now copy and paste content while retaining key formatting such as outline levels and column headings. It could be as simple as moving a task list from an email or more complex such as moving a complete plan from Project to Excel. Either way with the improved copy and paste capability, you will be more effective setting up project plans and communicating relevant project information.

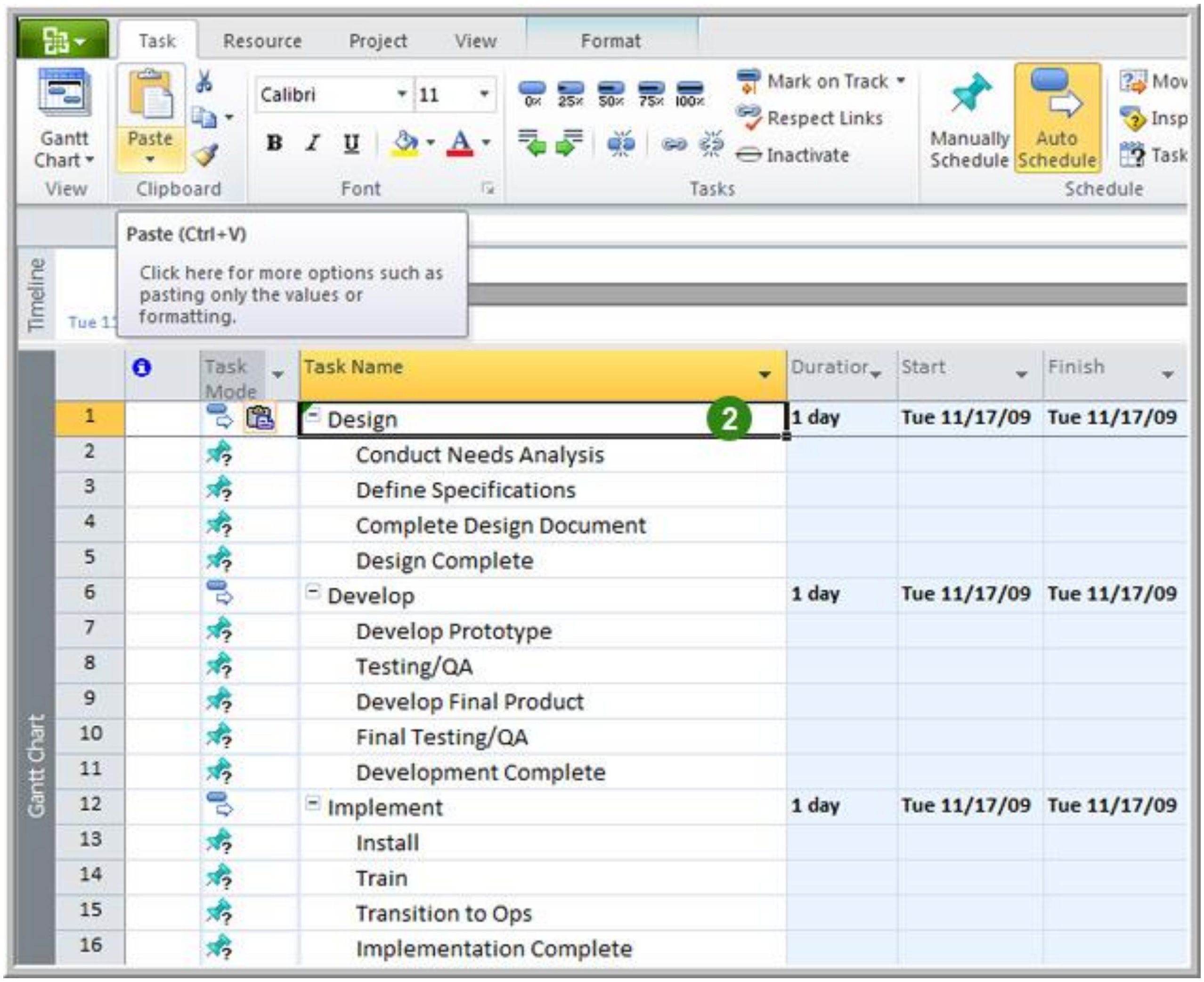
Step 1 - Copy data from another source such as an email, Outlook tasks or other Office applications

Highlight the area or data you want to copy and select the **Copy** command.



Step 2 - Paste into Project Professional 2010

In Project Professional 2010, highlight the column (or columns) you want to paste the data into. In this case, we are simply pasting tasks into the task name column.



Notice the outline structure has been retained upon paste and Design, Develop and Implement are all phases

Step 3 - Copy and Paste from Project to other Office applications

If you highlight the specific column headings and data that you want to paste into other Office applications such as Excel, Word or PowerPoint – the formatting and column headings will be retained for more effective presentation and communication. Give it a try and you will be impressed how easy it is to share project information without having to reformat data.

Intuitive Access with the Ribbon

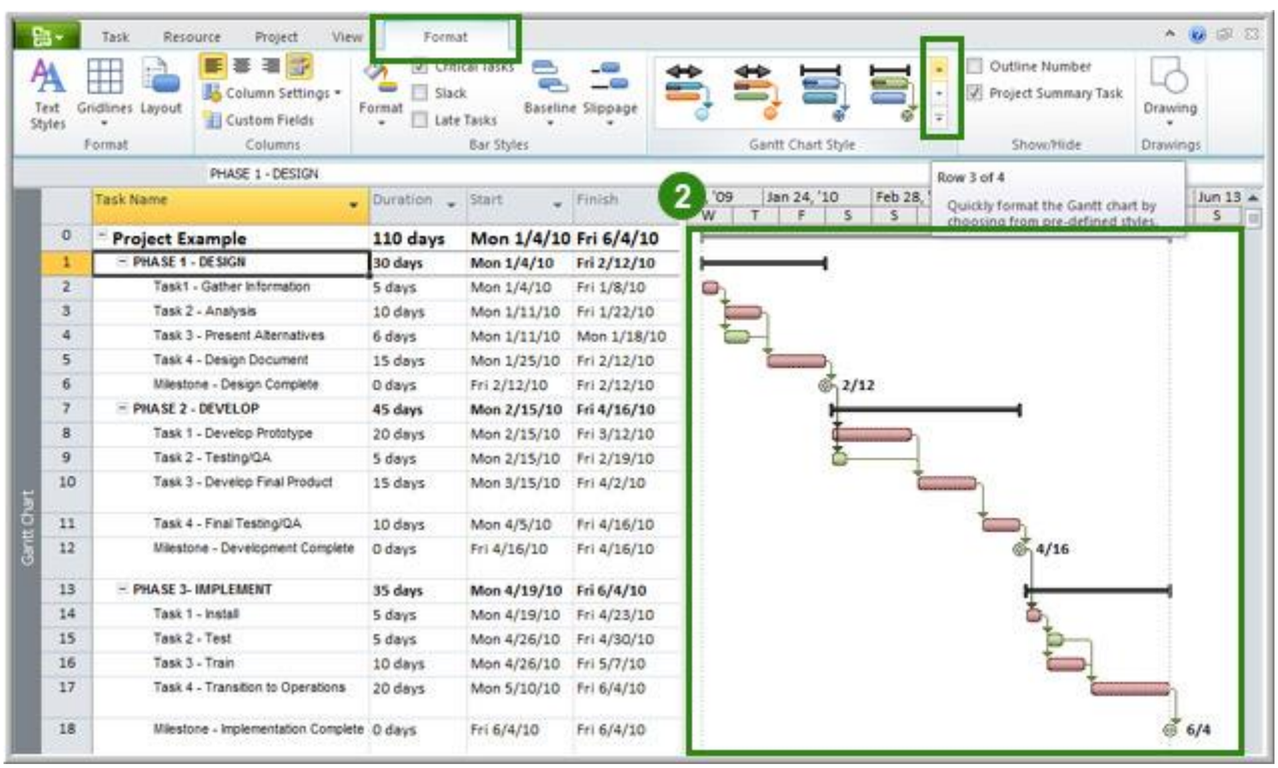
With the Microsoft Office Fluent™ user interface incorporated into Project 2010, you will find it much more intuitive to access relevant features and functions based on how you plan, track, and report on projects. All the old menus and toolbars have been replaced with the new Ribbon that organizes commands into logical groups on each main tab, so you can be more efficient. Whether you are managing your tasks, resources, project information, or you simply need to communicate more effectively, the Ribbon serves up relevant commands in a manner that matches the way you work. The following is just one example of how easy it is to format your Gantt chart in Project 2010 for better communication.

Step 1: Present Information More Effectively with the Format Tab

On the Format tab, you can easily format views for more effective communication. For example, modify the Gantt chart in the Gantt Chart Style group, or create Custom Fields in the Columns group.

Step 2: Format the Gantt Chart in the Gantt Chart Style Group

In the Gantt Chart Style group, click a bar style. Scroll to see additional options.



You can scroll for more selections.

Step 3: Apply Custom Formatting to Other Options

For example, in the **Bar Styles** group, you can select and format other options, such as **Critical Tasks.**

Add Key Milestones to the Timeline View

Communicate more effectively by easily adding key milestones to the Timeline view.

One of the best new features in Microsoft® Project 2010 is the Timeline view. The Timeline provides you with a high-level, “big picture” overview of the entire project. You can easily add key milestones or other key tasks to create a concise project summary for more effective communication to key stakeholders. When you are ready, you can send it off in an e-mail, add it to a presentation, or simply print it for an eye-catching, executive-style report.

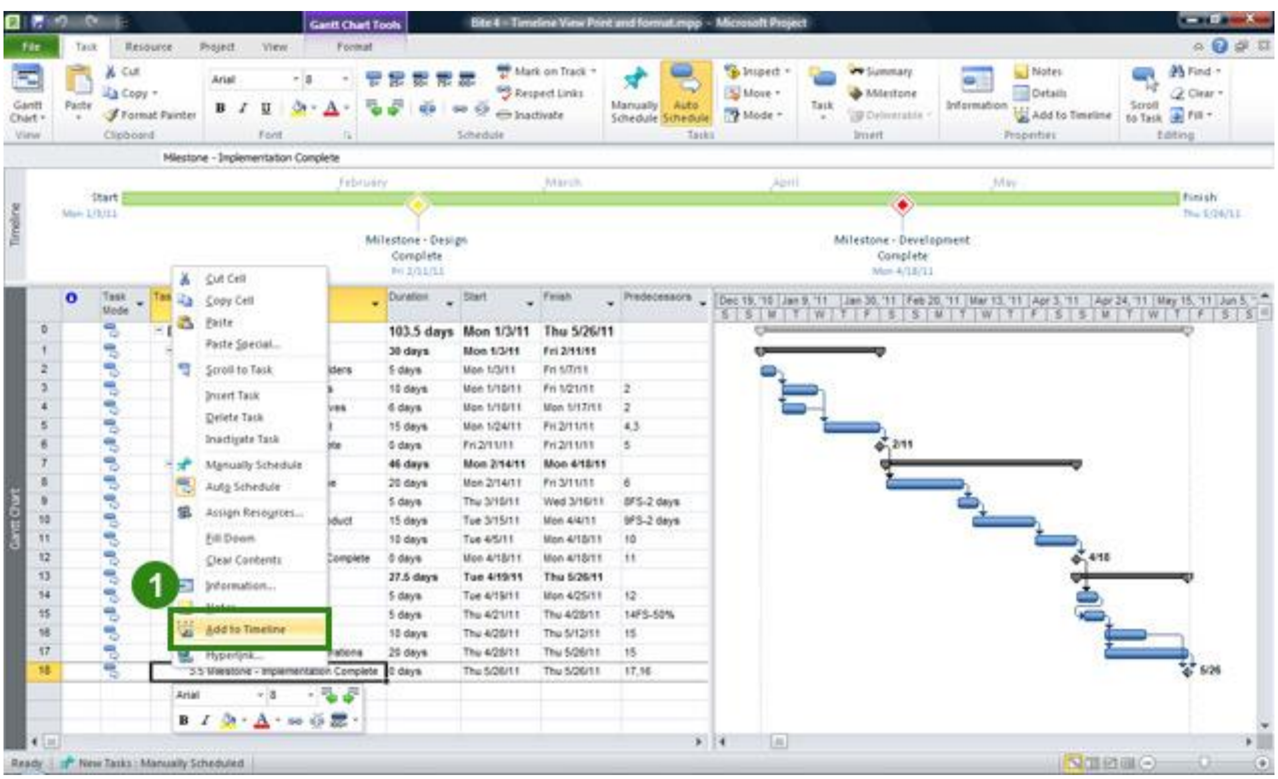
Step 1: Add Milestones to the Timeline View

The default view in Project 2010 is a combination of the Gantt Chart view with the Timeline view layered above it.

A. In the Gantt chart, click the task or milestone you want to add to the Timeline view.
B. Right-click the milestone, and then click Add to Timeline.

Step 2: Format the Milestones

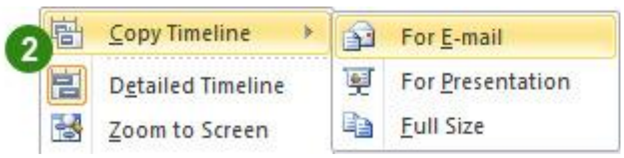
After adding milestones to the Timeline view, you can format them with the colors you want to use. Click the milestone in the Timeline view to automatically activate the Format dialog box. You can quickly and easily format your milestone font and background color.



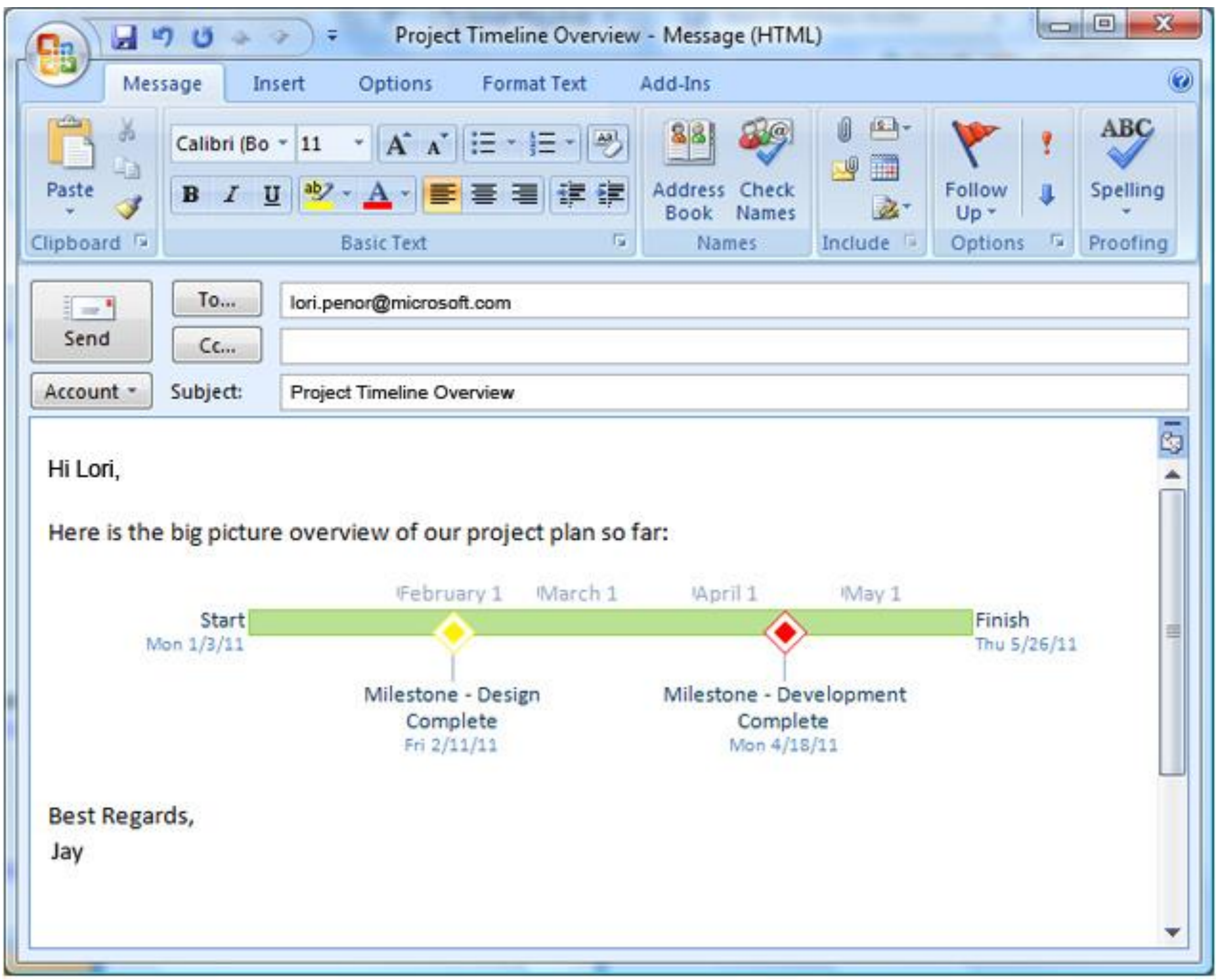
Step 3: Easily Send in an E-mail Message or Save to PowerPoint or to Another Office Application

A. Right-click anywhere in the Timeline view (except for on the Timeline itself).

B. Click Copy Timeline, and then click E-mail, For Presentation, or Full Size. You can also locate the Copy Timeline command on the Format tab, in the Copy group.



C. In your e-mail message, presentation, or other file, simply use the Paste function for that application.



Add a New Column & Save as a Custom Table

Easily add new columns and save the table you've created as a custom table.

In Microsoft® Project 2010 you can easily add columns to customize any existing table in the Gantt Chart view and save it as a custom table for future use. There will be many times when you might need to add a column to an existing table or project plan—for example, Work, % Complete, or maybe even a custom text column for adding comments, for instance. In each Project 2010 file, the last column on the right is labeled Add New Column. In this column, you can either select a column type and name from a drop-down list or type in a new, custom name to automatically create a new custom field.

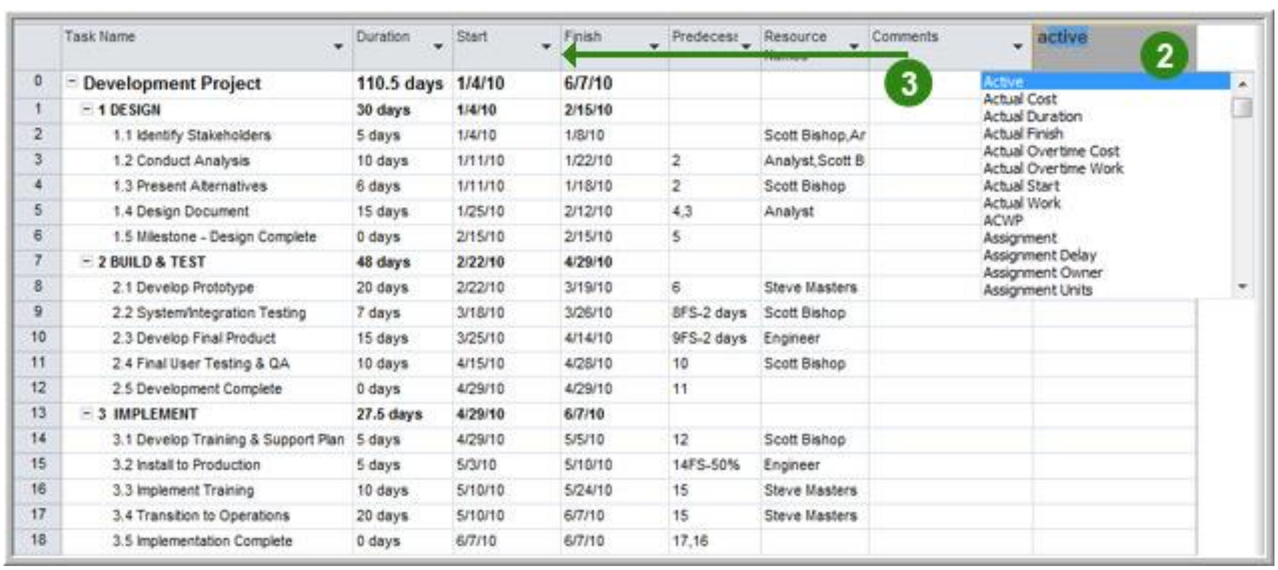
Step 1: Find the Add New Column Heading

In the Gantt Chart view, in the table, scroll to the right. Note that the heading of the last column is Add New Column.

Step 2: Pick the Field You Want to Add As a Column

Option A – Pick from existing list: In the drop-down list, scroll to and click the field (column) you want to add. You can also "quick-pick" by typing in the first letters of the field.

Option B – Type in a custom name: Type directly in the Add New Column column heading. If the field name does not already exist, Project will automatically create a new field. In the following example, Comments was typed into the Add New Column heading, and then moved to a different location in the table (see Step 3).



	Task Name	Duration	Start	Finish	Predecess	Resource Names	Comments	active
0	Development Project	110.5 days	1/4/10	6/7/10				
1	1 DESIGN	30 days	1/4/10	2/15/10				
2	1.1 Identify Stakeholders	5 days	1/4/10	1/8/10		Scott Bishop,Ar		
3	1.2 Conduct Analysis	10 days	1/11/10	1/22/10	2	Analyst,Scott B		
4	1.3 Present Alternatives	6 days	1/11/10	1/18/10	2	Scott Bishop		
5	1.4 Design Document	15 days	1/25/10	2/12/10	4,3	Analyst		
6	1.5 Milestone - Design Complete	0 days	2/15/10	2/15/10	5			
7	2 BUILD & TEST	48 days	2/22/10	4/29/10				
8	2.1 Develop Prototype	20 days	2/22/10	3/19/10	6	Steve Masters		
9	2.2 System/Integration Testing	7 days	3/18/10	3/26/10	8FS-2 days	Scott Bishop		
10	2.3 Develop Final Product	15 days	3/25/10	4/14/10	9FS-2 days	Engineer		
11	2.4 Final User Testing & QA	10 days	4/15/10	4/28/10	10	Scott Bishop		
12	2.5 Development Complete	0 days	4/29/10	4/29/10	11			
13	3 IMPLEMENT	27.5 days	4/29/10	6/7/10				
14	3.1 Develop Training & Support Plan	5 days	4/29/10	5/5/10	12	Scott Bishop		
15	3.2 Install to Production	5 days	5/3/10	5/10/10	14FS-50%	Engineer		
16	3.3 Implement Training	10 days	5/10/10	5/24/10	15	Steve Masters		
17	3.4 Transition to Operations	20 days	5/10/10	6/7/10	15	Steve Masters		
18	3.5 Implementation Complete	0 days	6/7/10	6/7/10	17,16			

Step 3: Move the Newly Added Column

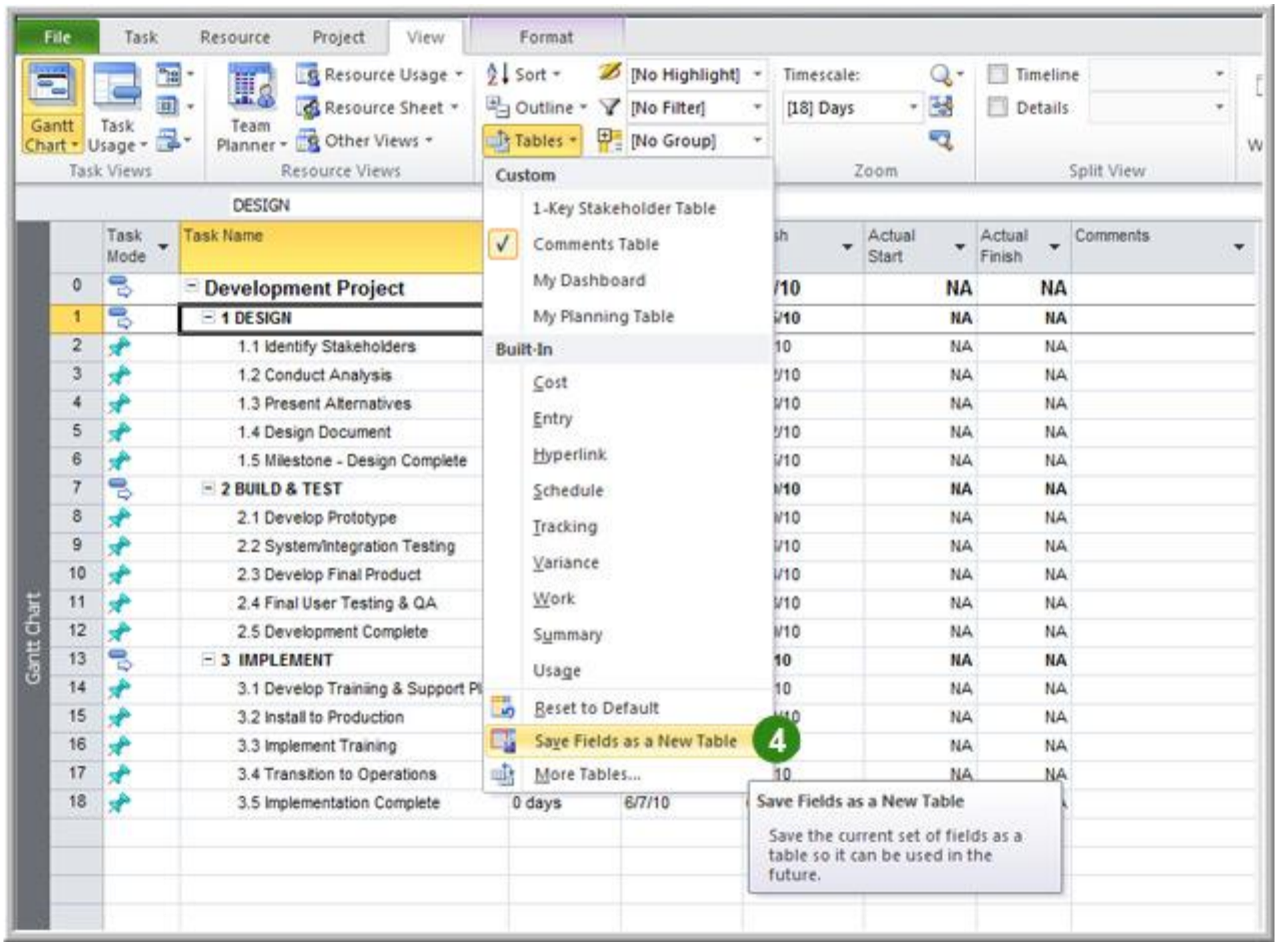
Simply drag the column heading to move or reposition it in the table.

Note: At any time you can right-click the column heading, and then click Hide Column to remove it from the table.

Step 4: Save As a Custom Table

A. On the View tab, in the Data group, click the Tables arrow to see more options.
B. In the Tables drop-down list, click Save Fields as a New Table.
C. In the Save as New Table dialog box, type the custom name (in this example, Comments Table), and then click OK.

Note: After saving a new table, the table name will be listed as a choice in the Tables list in the Custom section.



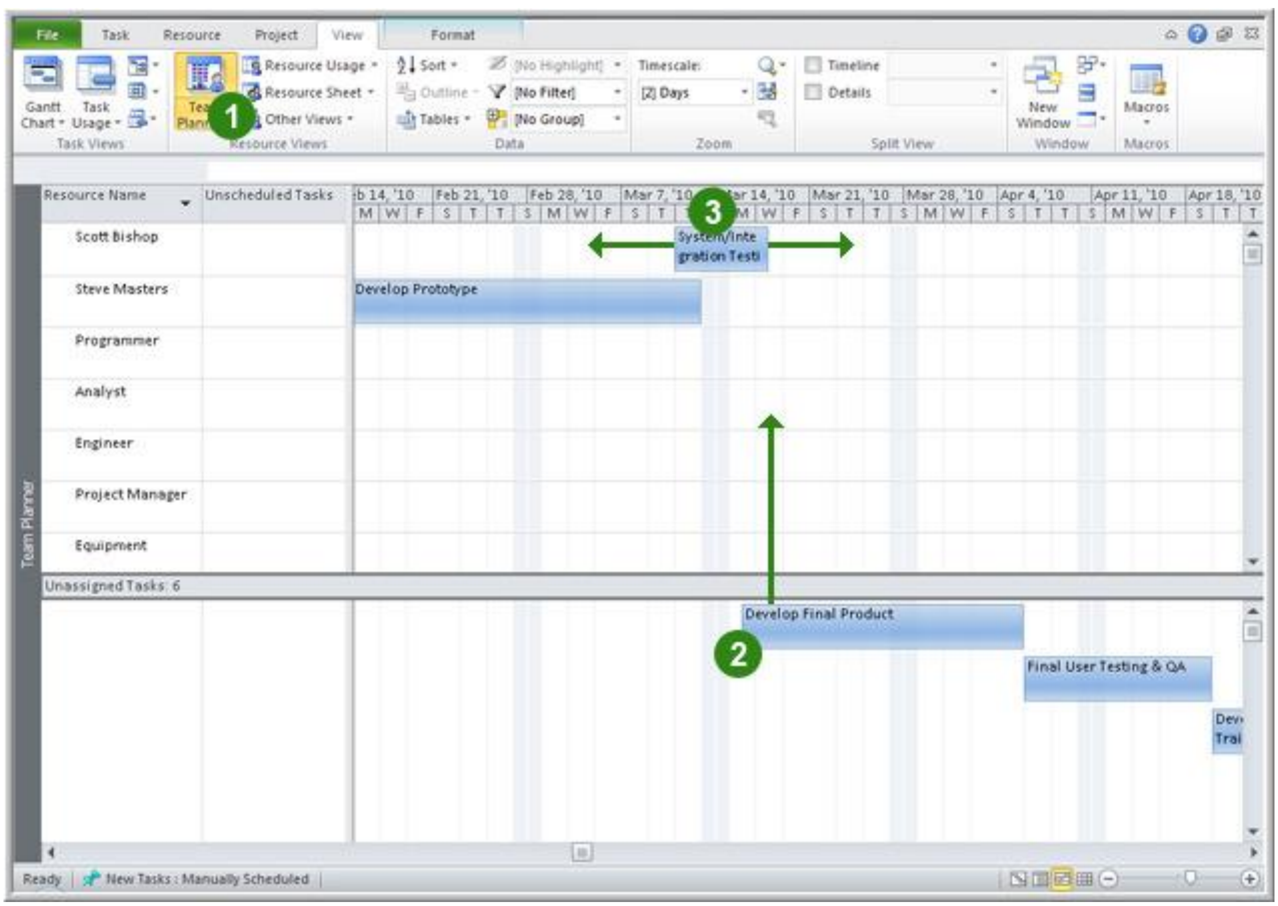
Effectively Manage Resources with Team Planner View

Use Team Planner view to easily visualize resource workloads and simply drag tasks or resources to change assignments.

In the Team Planner view in Microsoft® Project Professional 2010 you can see at a glance what tasks have been assigned to resources. With a simple dragging motion you can change existing assignments to over allocated resources or assign currently unassigned tasks to available resources. In the Team Planner view you'll find that managing resources just got a whole lot easier.

Step 1: Go to the Team Planner View

To go to the Team Planner view, on the **View tab**, in the **Resource Views** group, click **Team Planner**. (You can also access the Team Planner view at the bottom of the screen, in the View shortcuts on the status bar.)



Step 2: Drag Unassigned Tasks to Available Resources

In the Unassigned Tasks pane in the Team Planner view, drag tasks to any resource name. You can also drag to move existing task assignments to other resources.

Step 3: Drag a Task to Reschedule Start and Finish Dates

Simply drag a task to start earlier (left) or later (right).

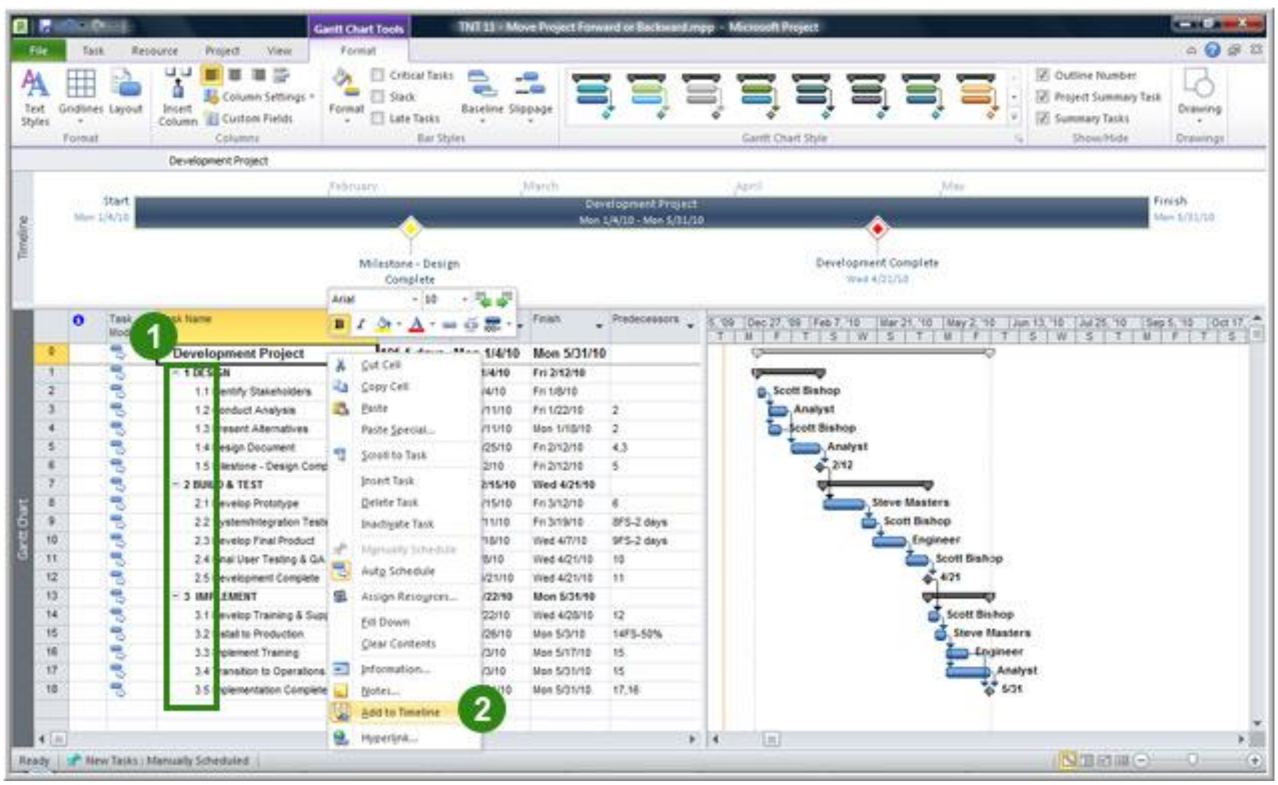
Add Project Summary Tasks & Outline Numbers

In the Show/Hide group, you can add a Project Summary Task or outline numbers, and add the Project Summary to your Timeline view.

With Microsoft® Project 2010 it's easy to add a top-level summary task to roll up your entire project to one summary-level line. This lets you see the total duration, and start and finish dates for the entire project. You can even roll up other project details, like costs or work, if these fields are part of your schedule. In addition, you can add a project summary task to your Timeline view to create more effective presentations. An additional option is adding outline numbers for tasks, such as 1.1 or 1.2, based on the location of the task in your plan. Outline numbering updates automatically if you move or add tasks.

Step 1: Show Project Summary Tasks and Outline Numbers

A. A: In the Gantt Chart view, on the Format tab, in the Show/Hide group, select the Project Summary Task check box.
B. B: Then, select the Outline Number check box. As shown in the following example, each task will now be numbered; for example, 1.1, 1.2, 1.3, and so on.



Step 2: Add a Project Summary Task to the Timeline View

A. In the Timeline view, on the View tab, in the Split View group, select the Timeline check box.
B. In the Task Name column, right-click the project summary task—this is the level 0 task, in this case, Development Project—and then click Add to Timeline.

Make Smart Scheduling Decisions with Task Inspector

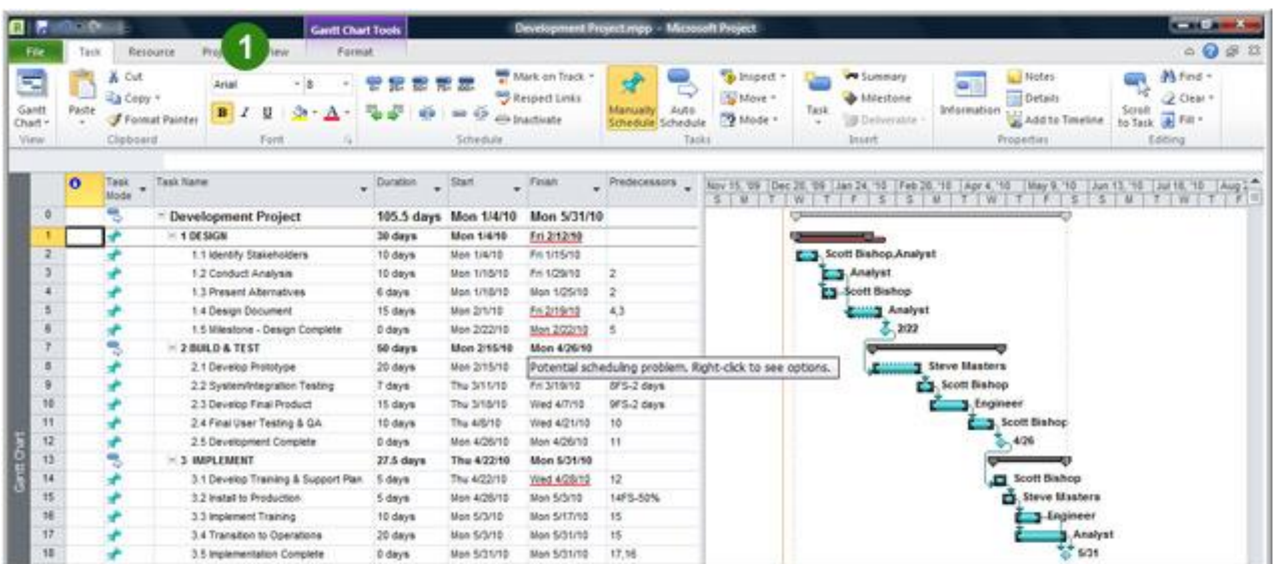
Use Task Inspector to help resolve scheduling problems that appear on your plan.

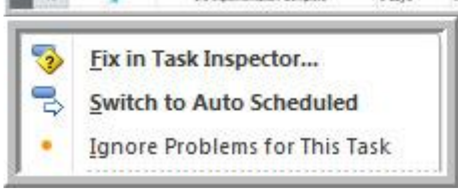
It's likely that occasionally you'll notice red underlines on dates in your Microsoft® Project 2010 project plan. These indicate possible scheduling conflicts that will require your attention to resolve. You can use the new Task Inspector tool to help you identify precisely what is causing the problem, and to choose the best corrective action to take. For instance, in the following example, you can see that the Design phase is scheduled to end sooner than the Design Complete milestone, which causes a scheduling conflict. Using Task Inspector, you can choose to extend the phase completion date, switch to Automatically Scheduled task mode to have Project resolve the conflict, or you can simply ignore the problem. You can also use Task Inspector when there are no scheduling issues, to view the factors that affect any task. For example, if a task has more than one predecessor you can quickly identify which one is driving the start date.

Step 1: Activate the Task Inspector Pane

A. Right-click the red underlined text OR, on the View tab, in the Tasks group, click Inspect.
B. Click Fix in Task Inspector.

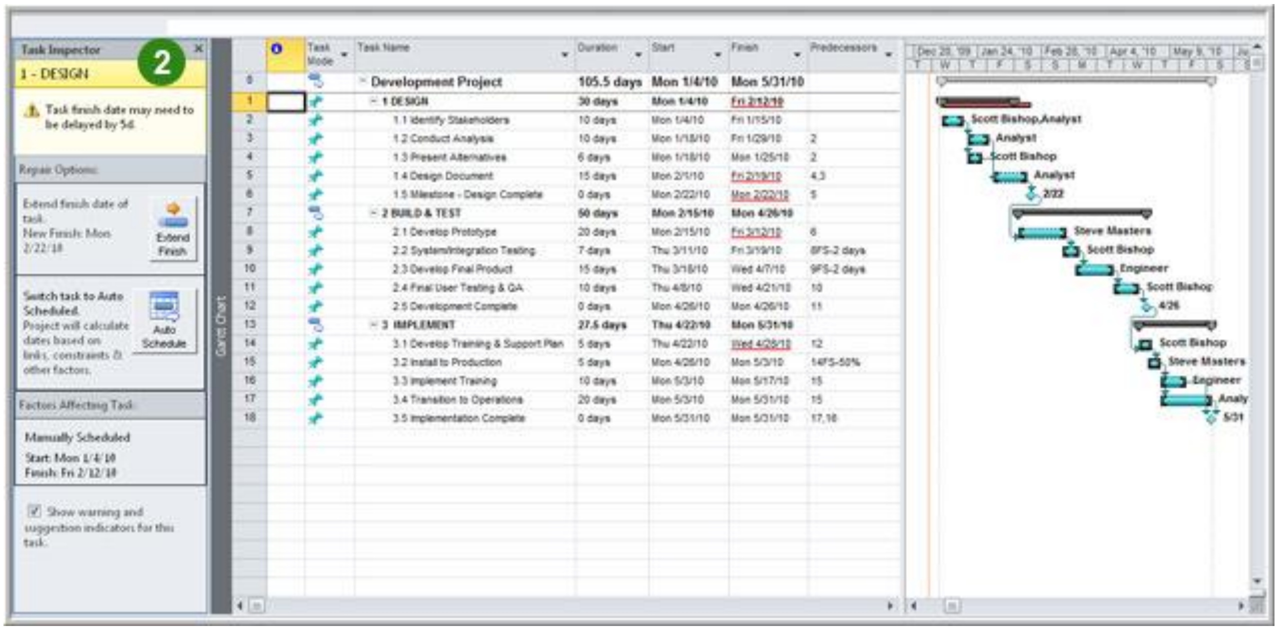
Note: You can also click Ignore Problems for This Task to remove the red underline.





Step 2: Use Task Inspector to Choose the Best Repair Option or to Identify Controlling Factors

A. In the Task Inspector pane, review the Problem, Repair Options, and Factors Affecting Task sections.
B. Under Repair Options, you can choose the most appropriate repair option and review the effect on your schedule.
C. Under Factors Affecting Task, you can analyze which predecessor or other factor, such as a task scheduled in Manually Scheduled task mode, is driving the start date.



Sync with SharePoint

Sync with team members in SharePoint Foundation 2010 or SharePoint Server 2010—now it's easier than ever.

With a simple click you can easily sync your Microsoft® Project Professional 2010 project plan with Microsoft SharePoint® Foundation 2010 (formerly Windows® SharePoint Services) for better collaboration with project stakeholders, including team members and executives. Users can view project information as a task list (similar to the Gantt Chart view) in SharePoint Foundation 2010, and syncing is bidirectional so project managers can send and receive task status updates—and all stakeholders stay informed.

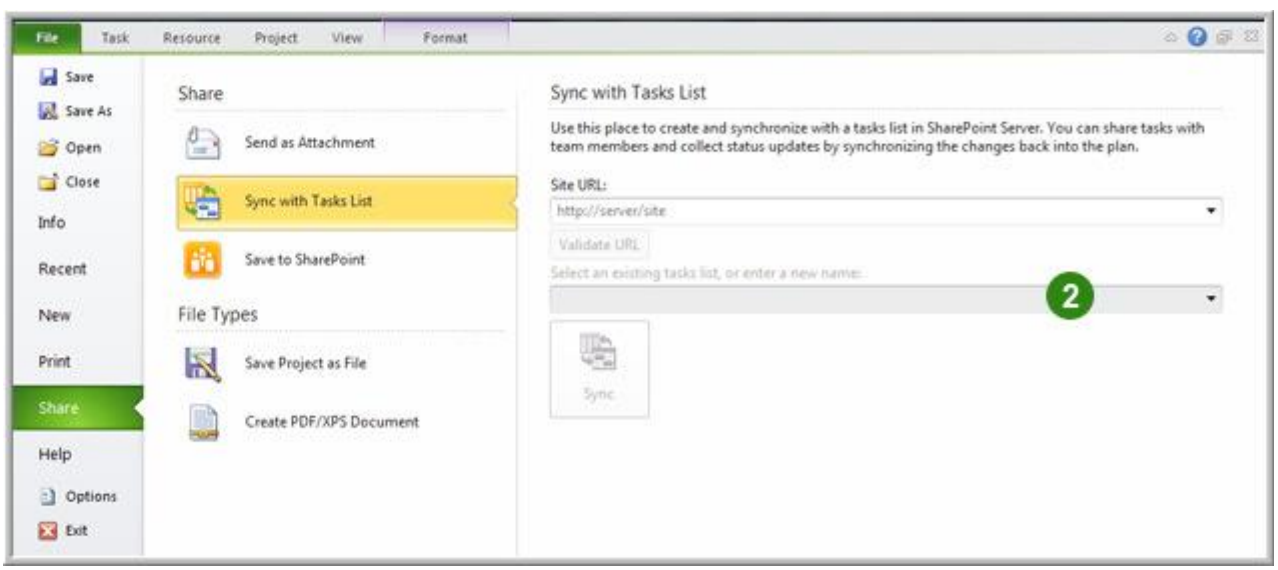
Step 1: Open Microsoft Office Backstage™ View

A. To open Backstage view, click the File tab.
B. To access the Sync with Tasks List option, click the Share tab.

Step 2: Sync with Tasks List

Click Sync with Tasks List to automatically set up a new task list in SharePoint in a simple Gantt chart format. You can view the task list in SharePoint and sync the task list with Project at any time, including updates from team members such as revised tasks dates or percent complete for tasks.

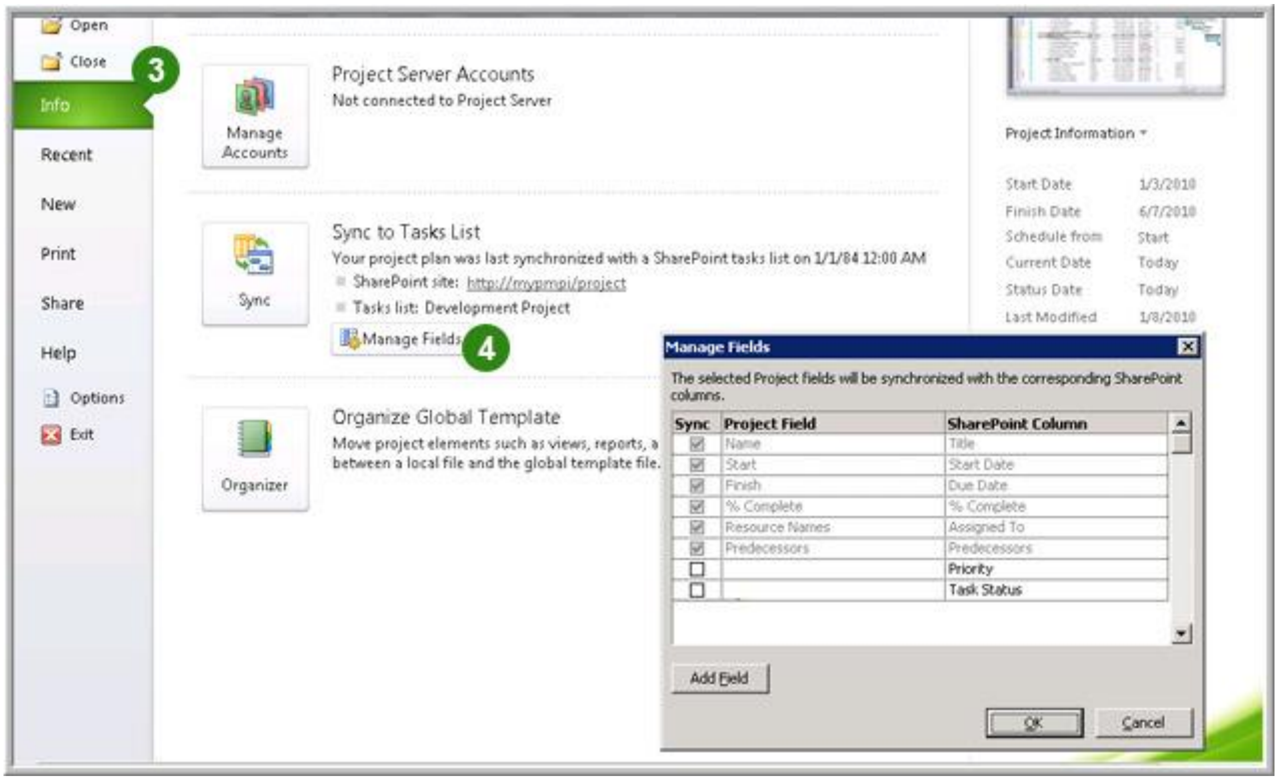
A. In Backstage view, on the Share tab, click Sync with Tasks List.
B. In the preview pane, be sure that the entry in the Site URL field is correct, and then click Validate URL.
C. Select an existing task list or enter the new name of the task list that will appear in SharePoint.
D. Click the Sync button.



Step 3: Sync for Updates or Changes

You can easily sync when you make changes to your schedule in Project or to receive updates from the task list in SharePoint.

A. In Backstage view, click the Info tab
B. Click the Sync button.



Step 4: Add Fields to Sync

Project 2010 defaults to syncing the following fields: Name, Start, Finish, % Complete, Resource Names, and Predecessor. You can easily add more built-in or custom fields to sync.

A. In Backstage view, click the Info tab.
B. In the Sync to Tasks List area, click Manage Fields.
C. Click Add Field, and then, in the Add Field dialog box, click the fields you want to add. Click the Add Field button, and then click OK.

Note: You must have Microsoft SharePoint 2010 Server or Microsoft SharePoint Foundation 2010 to use this feature of Project 2010. In addition, syncing with SharePoint works only in Manually Scheduled task mode (Automatically Scheduled tasks will be changed to Manually Scheduled task mode) and with links that are finish-to-start, with no lag time. Also, if you have resource assignments associated with tasks, for them to be accepted into the SharePoint task list, the resources must be set up in SharePoint as users with the exact same name.

Focus on Data with AutoFilter

Use the AutoFilter feature to quickly slice and dice your project information for fast results.

Every column in your Microsoft® Project 2010 project plan has an AutoFilter drop-down list that you can use to quickly zero in on information that pertains to the specific column. For example, if you want to quickly display only the tasks scheduled for the next week or the next month, click the AutoFilter arrow in the Start column (Option A). If you want to quickly filter on a specific resource, click the AutoFilter arrow in the Resource Names column (Option B). Note that you have the option to sort and group by column data type in the same drop-down list, so you have even more flexibility to quickly display the project information that you need, the way that is most helpful to you and your stakeholders.

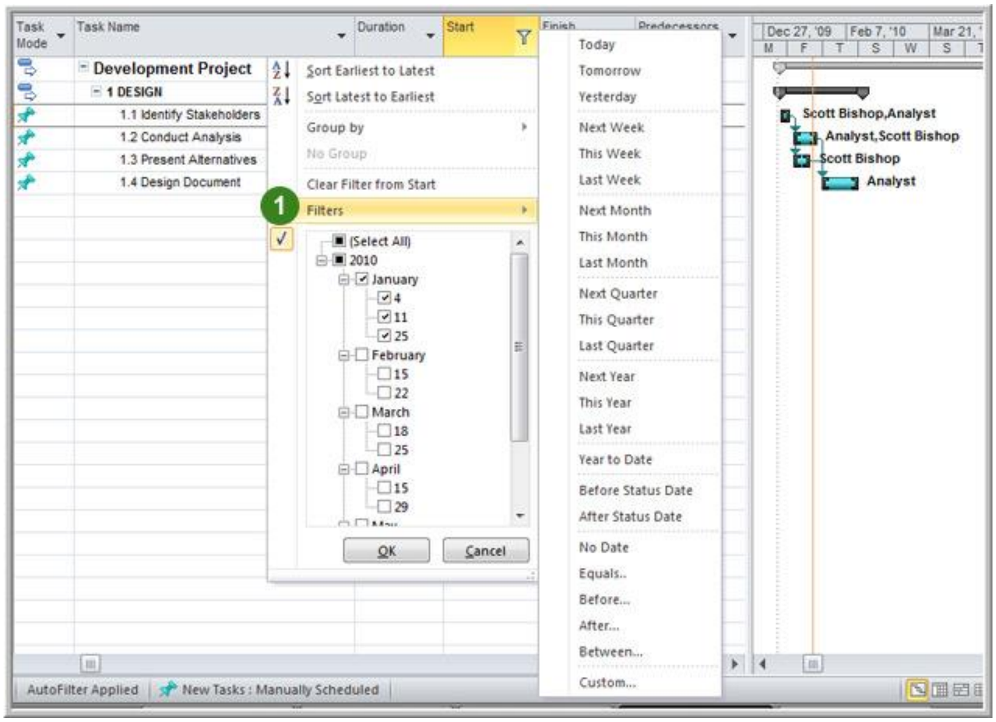
Step 1: Pick a Column Where You Want to Apply AutoFilter

A. In the Gantt Chart view, determine the column that you want to filter.
B. Click the AutoFilter arrow at the top of that column to see your options.

Step 2: Choose Your Filter Criteria

Option A – Select from preconfigured filters: In the AutoFilter drop-down list, click Filters, and then click an option from the list of preconfigured filters that appears.
Option B – Select custom criteria to apply: Simply select the check boxes of the criteria you want to apply, and then click OK. In the following example, only tasks that start in January are selected and will appear in the filtered view.

Note: Click Select All to clear all the criteria check boxes at one time.

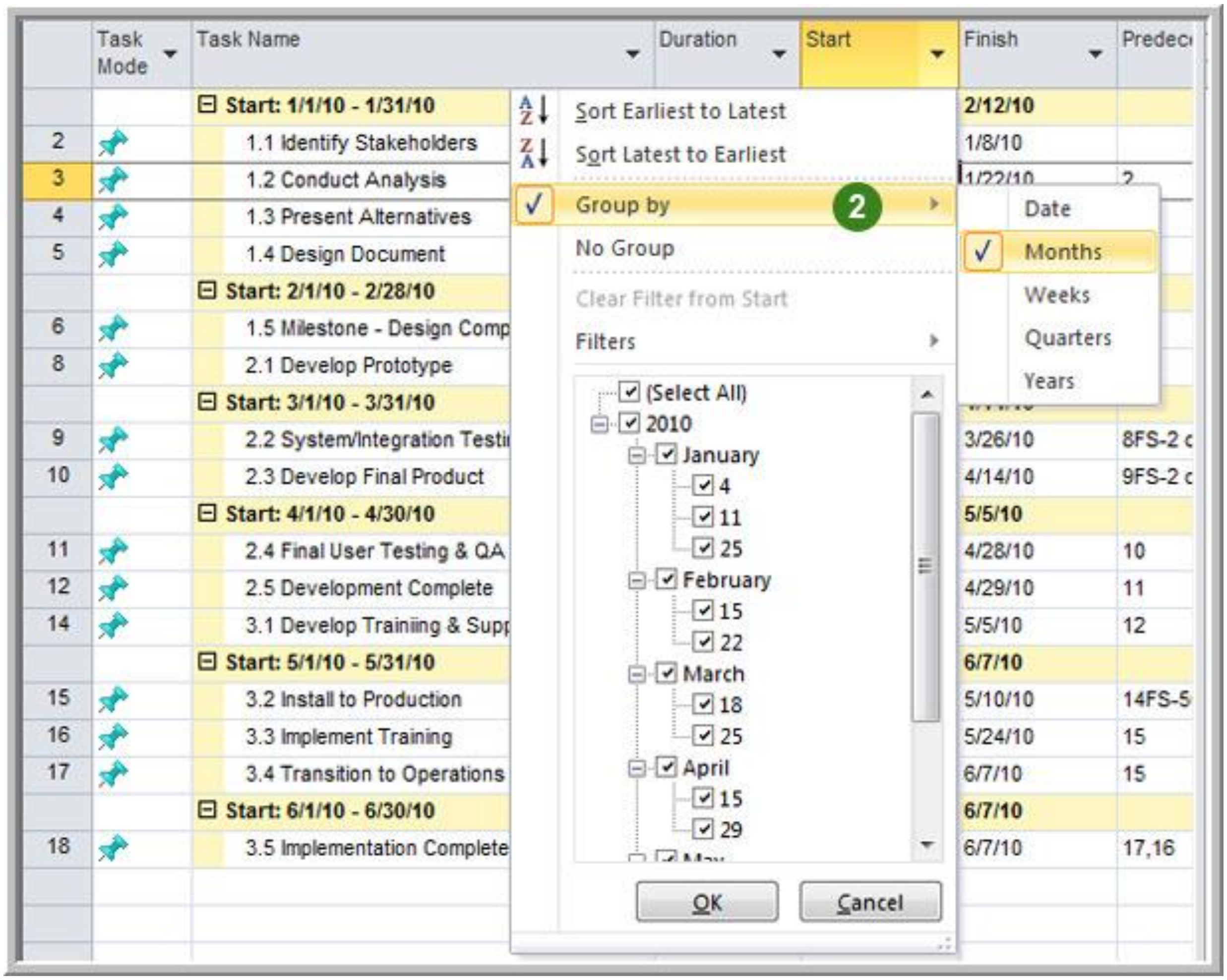


Step 3: Clear the Filter

In the same AutoFilter drop-down list, click Clear Filter from Start.

Step 4: Sort or Group

You also have the option to sort or group by using the same drop-down list. The following example demonstrates grouping by month. To clear a group, click No Group in the drop-down list.



Task Mode
Task Name
Duration
Start
Finish
Predece
Start: 1/1/10 - 1/31/10
1.1 Identify Stakeholders
1.2 Conduct Analysis
1.3 Present Alternatives
1.4 Design Document
Start: 2/1/10 - 2/28/10
1.5 Milestone - Design Comp
2.1 Develop Prototype
Start: 3/1/10 - 3/31/10
2.2 System/Integration Testi
2.3 Develop Final Product
Start: 4/1/10 - 4/30/10
2.4 Final User Testing & QA
2.5 Development Complete
3.1 Develop Trainiing & Supp
Start: 5/1/10 - 5/31/10
3.2 Install to Production
3.3 Implement Training
3.4 Transition to Operations
Start: 6/1/10 - 6/30/10
3.5 Implementation Complete
Sort Earliest to Latest
Sort Latest to Earliest
Group by
2
No Group
Clear Filter from Start
Filters
(Select All)
2010
January
February
March
April
Date
Months
Weeks
Quarters
Years
OK
Cancel