Microsoft Project 2007 – Step by Step Guide on Preparing a Project Plan (Without using Project Guide)

Step	Purpose	Specific STEPS (Without using Project Guide)	Comments
1.	**Getting to Grips with Microsoft Project 2007**	*1.* **Open File/New –** *create a new project file and File\Save as "My Project Plan" in a suitable document folder* **2. Understand the location and purpose of the following:** • **Task Table** – In ***Gantt View*** the table where *Task Name* is located, on left side of the vertical Split between the Table and the Gantt chart. Note also in the Task Table you can hover over the column header and the pointer becomes a downwards arrow and shows a Smart Tag for Help on the specific Field – note the vertical split view line is movable to left or right to see more of either Table fields or Gantt lines • **Gantt Chart** – In Gantt View the Chart where the Gantt lines are located, on right side of the vertical split between the Table and the Gantt chart • **Active Pane Indicator** – the vertical line showing the active view to the left of the Task Table. It shows the name of the view on its border. Note if you right click on it you can switch on the View Bar or switch to another view easily. The alternative is to go to Menu View\ and select the view you are looking for • **Timescale -** In Gantt View, the Gantt Chart has a timescale at the top of the pane – if you right click on the timescale you will see Timescale or Zoom where you can alter the scales used. In the Standard toolbar you will also see the Zoom + and – buttons which will also change the timescale views in a rough way. • **Standard and other toolbars available** – you can choose and switch these on or off by going to Menu View\Toolbars and select all you wish to use. If you hover the pointer over any of the toolbar buttons it will show you its name. • **Task Pane -** The section of the Gantt view that holds the Task Table • **Indicators Column:** The column to the left of the Task Name column in the Task Pane. This shows a number of useful warnings and can also provide information on what is stored in the Notes field against the specific task • **Project Guide Toolbar –** can be switched on (View\Turn on Project Guide) to assist with a standard approach to setting up a new project schedule for the beginner to	It is worth taking your own tour around these initially and you will gain more insight as you run down through this **Step by Step Guide**. Throughout this **Step by Step Guide** the **convention used for any Menu** item is the same e.g. View\Toolbars\specific selection

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		using project – alternatively step through this Guide. • **Project Properties** – File\Properties where details on Project Name and Project Manager plus note field for Project Objective can be added. • **Project Information** – Project\Project Information where the Project Start Date, Schedule From, and other basic information can be added • **Task Information** – Double Click on any of the tasks in the Task Pane – this is the normal place to go to look at any tasks basic information such as – **General Tab**: Duration, Priority, percentage complete, **Predecessors Tab**: Predecessors, Task dependencies, Lead/Lag, **Resources Tab**: Resources, **Advanced Tab:** Deadline, Constraint Type, Constraint date, Task type, Effort Driven, Resource Calendar selection, WBS Code, Earned Value method, **Notes Tab:** Text field for notes against any specific Task – you can also insert documents here – note it shows as a yellow icon in the Indicators column. You can hover over this column for the task and it will reveal the note information, **Custom Fields Tab:** contains custom fields as set later in the process	
2.	**Create a Project File**	**1. Open File/New** 2. **Select Templates** (if necessary) "on Computer" if you have a template saved, or want to look through the Microsoft templates supplied. • *Click Project Templates Option "on computer".* • *Click "Templates on Office Online" if you wish to look for additional specific templates which you can download* 3. **Profile Box:** In Project 2007 Professional the first screen you may be requested to respond to is the "profile" box – in which you should select "Computer". (This allows Project 2007 to work *independently* of Project Server 2007). This only happens if your previous projects have been set up for ***Enterprise*** connection to Project server 2007 4. **Enterprise option**: Later you can change this to *Enterprise* by connecting to Project Server 2007 by *Tools\Enterprise Options\Microsoft Office Server Accounts* (You will need the url to	Microsoft Project 2007 is based on Microsoft's Access database so many of the functional capabilities of Excel and Access applies. Project 2010 has made the transition to using a SQL database which provides even further flexibility. Project 2007 does not work with Project Server 2010 due to the fundamental change in database used. To connect to **Enterprise option** you require **Microsoft Project Professional**

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		the Project Server from your Administrator)	version.
3.	**Define Project**	1. **Project Name:** *Menu: File\Properties* 2. **Start Date:** *Menu: Project\Project Information* 3. **Complete details in Project Properties – Project Title, Author of Project Schedule, Manager, Company, Use Comments to include Project Purpose and Objective** (In *Menu: File\properties)* 4. **Complete detail of Project Information:** Start Date (if not known select next Monday, this can be changed later), the other fields will be explained later. (In *Menu: Project\Project Information)*	Sometimes the exact start date is not known but it is acceptable to put a date in the future which approximates the realistic start date. This would normally be discussed with the Project Sponsor and depend on resource availability and also customer requirements.
4.	**Configure Project Options**	**1. Configure Global Options** (**Our recommendation in brackets**): • **Select** Tools\Options\General Tab • **Consider**, In *General Tab*, which selection you require : 1. Option to open last file at start-up (Yes, if you are often opening the same file, otherwise No) 2. Set Auto filter on for new projects (No) 3. Prompt for project info for new projects (No, can do later) 4. Recently used file list (Yes, up to 9 entries) 5. User name (Yes) 6. Undo Levels (Yes, up to 99) 7. Advice from Planning Wizard and sub selections (Yes until you are confident you no longer need this) 8. Automatically add new resources and tasks (Yes, saves time) 9. Default Standard Rate/Overtime Rate (No, unless using a *blended rate* for **all** work resources) 10. Service Options (No) 11. *Set as Default* (Yes, if you wish to commit your selections to Global Template - Global.mpt – otherwise No).	Although it is possible to configure these options later, it is recommended that the **Global and Toolbar options** are configured early to ensure a systematic approach. **Open last file at start up: Recommended** if you use the same project file for a long period **Set as Default:** This takes your selection so far and saves it into the Global Template. If you want these changes to be part of the global template then "set as default" as above for Global options. These will be available every time you open a project file on your computer.

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		• **Select** *View Tab*: 1. Default View (Yes, select the view that you prefer on a regular basis – for planning select Gantt Chart or Resource Sheet; for execution select Tracking Gantt) 2. Calendar Type (Yes, use default Gregorian, unless Hirj or Thai Buddhist Calendar, or a custom calendar is more appropriate) 3. Date Format (Yes, select your preference) 4. Show boxes (Yes to all) 5. Cross Project Linking options for "Project File Name" boxes (Yes to all available – Automatically Accept new External data only applies for Enterprise option) 6. Currency Options for "Project File Name" (Yes as appropriate) ▪ Select appropriate "Currency" – note other symbol and placement have a "default" showing for each Currency selected – you may wish to alter the Placement option) ▪ Decimal digits (Yes accept default value of 2 unless you wish rounding) 7. Outline Options for "Project file Name" (Yes to all) ▪ Select default and "Show project summary task" and "Show outline number" • **Select** *Schedule Tab*: 1. Schedule Options for Microsoft Office project: Accept default settings unless specific project need: ▪ Show scheduling messages (Yes until these start to annoy!) ▪ Show assignment units as a: Decimal, unless your preference is to use Percentage values. 2. Scheduling Options for "Project File Name"	**View Tab:** An important selection on starting a new project. **Schedule Tab:** An important selection on starting a new project.

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		▪ New Tasks: Start on Project Start Date (Yes, gives you best flexibility before linking tasks)
		▪ Duration is entered in: Days (Yes)
		▪ Work (or Effort) is entered in: Hours (Yes)
		▪ Default task type: Fixed Units (Yes, but care here – see section on Task Types later)
		▪ Deselect "New tasks are effort driven until you have completed the Resourcing of your schedule
		▪ Select all for: (Yes)
		  ▪ Autolink inserted or moved tasks
		  ▪ Split in progress tasks
		  ▪ Tasks will always honour their constraint dates
		  ▪ Show tasks have "estimated" durations (this shows as a "?" but normally disappears when you manually enter a duration – otherwise deselect this option)
		  ▪ New tasks have estimated durations
		  ▪ Set as default button (Yes if you wish to commit your selections to the Global template, care here)
		• **Select** *Save Tab*:
		  1. Accept defaults as appropriate
		  2. Autosave: Select "Save every…minutes " (Yes, but care here, you may want to do this manually when you are happy rather than have it save automatically, but if you do, be sure to select "Prompt Before Saving")
		• **Select** *Interface Tab*:
		  1. Accept defaults as appropriate
		  2. Project Guide setting:
		    ▪ Select Display Project Guide if you are new to Project Management,
			Save Tab: An important selection on starting a new project.
			
			Interface Tab: Can be selected later, default is adequate.

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		or, use this Step by Step Guide. ▪ Note you can use a custom page under the "Project Guide Functionality and Layout Page" if you have a Corporate standard. The same applies to Project Guide Content. ▪ Set as Default (Yes) • **Select** *Calculation Tab*: 1. **Calculation Options for Office Project:** ▪ Calculation Mode: Auto (Yes) ▪ Calculate: All Open Projects (Yes) ▪ Calculate now: (only if you decide to use Manual Mode setting) 2. **Calculation Options for "Project File Name":** ▪ **Select** Updating task status updates resource status (Yes) ▪ **Select** Move end of completed parts after status date back to status date (Yes, a personal preference in Earned Value because a project manager may want to allow the tasks to "reflect reality" so I can get a true reading of the schedule based on the tasks actually completed at the Status date) ▪ And move start of remaining parts back to status date (Yes if above is Yes because it reflects reality. The baseline will show all the other information regarding original estimations and scheduling) ▪ **Select** Move start of remaining parts before status date forward to status date (Yes, as above) ▪ And move end of completed parts forward to status date (Yes, as above) ▪ *Earned Value Button*: **Select** (Yes) ▪ Default task Earned Value method: Select % Complete (Yes,	**Calculation Tab:** An important selection when starting a new project. **Earned Value**: Discuss with your Project

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		unless you are in Construction or related industry, where Physical % Complete is more appropriate) ▪ Baseline for Earned Value calculations: Select Baseline (Last saved on date) as appropriate (Yes) ▪ **Select** Edits to total task % complete will be spread to the status date (Yes, if using Earned Value) ▪ **Select** Inserted projects are calculated like Summary tasks: (No; or, Yes if working with Multiple Projects in a Master Project) ▪ **Select** "Actual costs are always calculated by Microsoft Project": (No, keep it ***manual input***, **unless** you are able to feed imported Excel information on Actual Costs from your Accounting Control Accounts) ▪ Edits to total actual cost will spread to the status date (Yes, if you are using Earned Value) ▪ *Default fixed cost accrual*: **Select** Prorated (Yes, you can always change this in the Resource Sheet view for each Resource type as appropriate) ▪ Calculate multiple critical paths (No, unless using Multiple projects in a Master Project) ▪ Tasks are critical if slack is less than or equal to: Default is 0 (Yes, but you may wish to track "Near Critical Tasks" as well, if so select an appropriate value for your threshold) ▪ *Set as Default* (Yes) • **Select** *Edit Tab*: 1. Edit Options for Microsoft Office Project (Yes) ▪ Select All boxes (default) 2. View Options for time units in "Project File Name" (Yes) ▪ Accept default as appropriate	Financial contact the means by which you can arrange for regular feeds of **Actual Cost** per Control Account and/or WP. **Fixed Cost Accrual:** Alternatives are Start, Prorated or End. If you are receiving Invoices for equipment or using consultants then you may wish to select "End". **Edit Tab:** Can be selected later, default is adequate.

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<table>
<tr><th>Step</th><th>Purpose</th><th>Specific STEPS (Without using Project Guide)</th><th>Comments</th></tr>
<tr><td></td><td></td><td>
Include Add space before label (Yes)
Set as default (Yes)
3. Hyperlink appearance in “Project File Name”
Accept default as appropriate
Select Underline hyperlinks
Set as default (Yes)
Select Security Tab:
1. Under Privacy Options for “Project File Name”:
Leave default, not selected (Yes, <u>until</u> you wish to use this outline/set up for other projects, then select to “Remove information from file properties on Save”)
2. Macro Security
Accept default “Medium” security on Macros (Yes)
Check box: “Require Project server and workspace sites to be added to IE trusted sites”. (No, unselect, unless using Project server or SharePoint sites)
3. Legacy Formats:
Select “Prompt when loading files…” if you wish to import files from Excel or Outlook, otherwise leave on default “Do not open/save…”
Select Calendar Tab:
Week starts on – Select Sunday (Yes, for UK, or as appropriate)
Fiscal Year starts in: “January” (Yes, or if internal your fiscal year: care not to confuse customers if you select your internal fiscal year, best to stick to January - Note: If you select another FY month you can then select the check box: “Use starting Year for FY numbering”)
Default start time: select default 8:00 (am), or as appropriate.
Default end time: select default 17:00 (pm), or as appropriate.
</td><td>Security Tab: Can be selected later, default is adequate.

Calendar Tab: An important selection when starting a new project.</td></tr>
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		5. *Hours per day*: **select** default 8, or as appropriate. 6. *Hours per day:* **select** default 8.00, or as appropriate. 7. *Days per month*: **select** default 20, or as appropriate. 8. **Select** Button, "Set as Default" (Yes, if appropriate – care, this makes sure your selections are saved to the Global template and makes them "default" for every project file you open on your computer from then on)	
		• **Select** *Collaborate Tab*: 1. Greyed out unless you have selected to use Project Server – in which case you will require the URL for the Web Access site from your administrator. • **Select OK, and Save the project file.**	**Collaborate Tab:** Can be selected later, default is adequate.
		2. Configure User Toolbar Options: • **Select** Tools\Customise\Toolbars 1. *In Toolbars Tab*: **Select** Check Box (es) for: ▪ **Accept** Default: Standard, Formatting, and Menu Bar. (Yes) ▪ **Then select others** *as required*: ▪ Collaborate (Yes only if connected to Project server) ▪ Custom Forms (No, unless wishing to create new Forms and Views) ▪ Drawing (No, unless wishing to illustrate or use drawing aids for Reporting) ▪ Resource Management (Yes) ▪ Task Pane (No, unless requiring to open new projects or templates as you work) ▪ Tracking (Yes) ▪ Visual Basic (No unless using Macros) ▪ Web (No unless wishing to access IE from within Project Table	**Toolbar Options:** A recommended configuration exercise early in the project creation. Although the Standard & Formatting (Default) toolbar selection is adequate to start with, having the other toolbar buttons available from the start saves time later. Just take time to ***hover your cursor over the toolbars*** to show SmartTags which tell you what the button activates. The more familiar you are with the toolbars available the quicker your set up becomes.

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		fields) ▪ Analysis (Yes, during execution phase) ▪ Compare Project Versions (No, unless wishing to do a comparison) ▪ Network Diagram (No, as this view is easy to select from the Gantt View anyway) ▪ PERT Analysis (Yes, if using PERT Estimations or doing a "what if" analysis) 2. *In Commands Tab:* **Leave Default** unless specific commands required. 3. *In Options Tab*: **Select** ▪ Personalised Menus and Toolbars: ▪ Show Standard Formatting toolbars on two rows (Yes) ▪ Always show Full Menus (Yes) ▪ **Note:** Can "Reset menu and toolbar usage data" if required ▪ Other: ▪ **Select** Check boxes: ▪ Large Icons (No, unless required) ▪ List font names in their font (Yes) ▪ Show ScreenTips on Toolbars (Yes) and ▪ Show shortcut keys in ScreenTips (No, unless you use them regularly) ▪ Menu Animations (leave default) • **Click OK, and Save project file**	
5.	**Set Project Calendar: Define General**	*1.* **To Set or Modify a Project Calendar:** *Menu: Tools\Change Working time* • **Default will be Standard**, but can be 24 Hour or Night Shift. Select as appropriate. • **Click *Create New Calendar*** - name it as appropriate (e.g. the UK Project Calendar, the Specific Project Name Calendar etc) and base it on the Standard Calendar, 24 Hour, or	**Note:** The default selection is "Standard" as configured above at **Step 4. Configure Options: Configure Global options: Select Calendar Tab** under

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	Working Times	Night Shift Calendar, as appropriate. Click OK. 1. **Note**: the default Calendar shown in "For Calendar" changes to the new Calendar name. • **Make adjustments to working week hours and special days as necessary using the following steps:** 1. **For overall changes and to Define Time Units**: In *Calendar View above click on Options button.* ▪ In Options\Calendar Tab: Make changes. Click OK. Brings you back to the "Change Working Time" Dialog Box. ▪ **For changes to the Working Week on specific dates** during the year: ▪ Select "Work Weeks" Tab ▪ Double Click on "[default]" or select "Details" button ▪ Make changes to specific days of the week hours by selecting either "set days to nonworking time", or "Set day(s) to these specific working times" ▪ **You can select more than** one day by holding down the *Ctrl* key or select and drag cursor over the days. ▪ Make changes in Hours and press "Enter" for each (otherwise it will not accept changes). Click OK 2. **For Special days or Dates** select the date in the Calendar above and select Exceptions Tab: ▪ Type in the day under Name (e.g. Factory Closing day) ▪ See date selected is shown in Start and Finish columns ▪ Select details button or Double Click on the Day Name field ▪ Opens "Details for Day Name" dialog box: ▪ Select working times as appropriate ▪ Select Recurrence pastern as appropriate with Range of	Tools\option\Calendar Tab. In this section we are considering what to do to **Modify and Apply other Calendars.** Always *add in* **the normal Holidays** for the country of delivery.

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		recurrence ending after the end of the project by several months or more to allow for slippages. ▪ Click OK. ▪ Continue to add days as required. Click OK. 2. **To assign the New Calendar to the <u>Overall Project</u>:** *Menu: Project\Project Information* • Click on drop down for Calendar and select *New Named Calendar*. OK. 3. **To Create a specific <u>Task</u> Calendar:** Where changes in working times are required that are **Task related:** • ***Create a New Calendar*** *as above (Modify Project Calendar)*, but name the new Calendar *by the task itself*, and then • **Double click on the Task**: Select new Task Calendar in the Advanced Tab in “Calendar” (note standard default is “none”) • **Select drop down** as new Task Calendar. Click OK. **4. To Create a specific <u>Resource</u> Calendar:** Where the resource can only be used during specific times or days, or where the resource has a different time zone, holidays or shift pattern to the Project as a whole. • ***Create a New Calendar*** *as above*, but name the Calendar by the Resource name itself, then, • **Double click on the Resource** in *Resource Sheet view*: 1. Select *General Tab* and “Change Working Time” button. 2. In Change Working Time Dialog Box, Resource Calendar for “Resource Name”: In base Calendar Select drop down as new Resource Named Calendar. Check times, exceptions and days reflect Resource constraints for working times. Click OK. • **Availability**: In Resource Information Dialog Box, select appropriate Dates for Resource Availability and Units. • **To Import Resource details**: To import details on specific Resource from Exchange	**Task Calendars** are used where the task can only be done at specific times and/or dates *irrespective* of the Resources used. **Resource Calendars** can refer to Human Resources or Equipment. If you are ***working with people from different countries*** you need to set up Calendars for each Time Zone or Country, and selecting the **Resource Information** for the specific resource, click on the *Change Working Time* button and alter the selection for their **Base Calendar** to the **new** Time Zone or Country **Calendar**. Note that working with a virtual team would suggest that the **Resource Calendar** is where to store the detail of working days. **Resource Availability** and **Units** are

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		select "Windows Account" and / or "Details" button. Click OK.	related to "**Assignment Units"(** which is when a Resource and its availability are linked to a Task)
6.	**Import the Tasks (Activities or Work Packages) into the Plan from Excel or Outlook**	1. **To import Excel Worksheet:** Open Excel spreadsheet containing Activity List. In New Project File: Menu: File\Open\Select Microsoft Excel Workbooks and browse to Excel file and click Open. • **This opens the Import Wizard:** Click through wizard; Click Next, new map, as a new project, Tasks only, select worksheet, and map any fields. Finish. • **Note: You cannot import an Excel 2007** file into **Project 2007**, you need to save file as **Excel 2003** before importing. 2. **Other Custom Import Maps** may be imported – such as Resource sheet details as required. 3. **You can also import Outlook tasks:** • *Tools\Import Outlook Tasks* • *Select Tasks to import*, OK.	**Note** that this Importing process requires you to use an import excel file that is fairly simple and that has a row of column header names that are simple without any other complex headers. These fields are typically: ID, Name (for Task), Duration, Dependency, Resource and Notes (for special deliverables or dependencies outside the project on which the project is dependant).
7.	**Organise the Tasks (Activities) into Phases and/or under Summary Tasks (e.g. Work Packages)**	**1. Create an Outline: Organise Summary Tasks and activities:** For each of the WPs and CAs (if doing Earned Value) determine which Phase the Project each task falls. • Sequence and Indent all Tasks under their WPs and indent all WPs under their CAs (Control Accounts), then indent all CAs under their Phase. **2. Enter Tasks/Activities:** • **Ensure you are in Table view:** *View\Gantt Chart and View\Table\Entry* • **Transfer WP names to Project Task Table under Task Name in Gantt View.** Menu: *View\Gantt Chart* (or right click on left hand bar in Task Table view) • **Break down each WP by inserting tasks (Activities) under the WP name as a Summary Task:** 1. Insert\New Task (or Recurring Task if appropriate), or 2. *Press "Insert" on computer Keyboard.*	It is suggested each set of tasks (or activities) are sequenced under the **Work Package** (WP) to which it belongs. It is recommended to collect specific Work Packages (WPs) under a **Control Account** (CA) Summary Task if it has been agreed to apply **Earned Value Measurements** for Performance Reporting.

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		3. *Ensure you enter "duration" estimates and* ***not*** *Start or Finish dates.* 4. Use "Indent" on Standard/Formatting toolbar Toolbar, or, use drag capability when selecting task and see double headed horizontal arrow head and drag to right so line is aligned with next level down • **Ensure the Milestones are zero duration.** Consider using a "Milestone" (zero duration) to mark the final deliverable(s) for each Work Package. **3. Create WBS Codes:** • Project\WBS\Define Code • In WBS Code Definition box: 1. Include Prefix code where appropriate 2. Level one sequence, choose Letters or numbers as appropriate you can select recur 3. Go down to Level based on the number of WBS levels, click OK • In Task Name Column heading Insert Column • In Field Name click "**WBS**", click OK **4. Set Outline Options** • **Select** Tools\Options\, View Tab • **Select** "Show Project Summary Task" and "Show Outline Number", OK.	Remember to **link the tasks**, use lead and lag or other dependency options (SS, FF, SF) as necessary. The top tasks in every WP should be linked to the preceding WP Task that truly precedes it (needs to finish before it starts). You can also **link tasks** by dragging the task bar in the Gantt Chart area to the next task bar, or by dragging a Network Node in the Network Diagram view to the next Node. **WBS Code:** It is sometimes useful for the specific **Project Code** to be used as a prefix for Accounting purposes.
8.	**Estimate Task Effort and/or Duration**	**1. Set Assignment Units:** Tools\Options\Schedule Tab • **Select** "Show assignment units as" as Decimal or Percentage as appropriate. **2. Set General Schedule Task Type Options**: Tools\Options\Schedule Tab • **Select** "Default task type" as appropriate – Fixed Units (default), Fixed Duration, Fixed Work • **Select** "New Tasks are Effort Driven" if appropriate. **3. Enter Duration and Work (i.e. Effort) Estimates:** • *In Gantt Chart View*, right click on Column "Start", and **Insert Column** • In Column Definition box, in Field name box, select **"Work".** OK.	The **Estimating method** you choose will depend on the answer to **two key questions**: 1. Will adding resources to the task result in a *reduction* in the duration? (i.e. reduce the start-finish time)? **Then it is a Work (Effort) Estimate.** 2. Will adding resources to the task have

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		• **Repeat** to introduce new column **“Type”.** OK. • **Repeat** to introduce new column **“Effort Driven”.** OK. • **For each task, complete** either **Duration estimate <u>or</u> Work (Effort) estimates.** • **Select for each task** appropriate **Task Type** and whether **Effort Driven** or not. • **Using Task Type to Calculate Work (Effort) or Duration:** 1. **Using Fixed Work** to calculate **Duration**: (This is the normal setting for entering Work (Effort) estimates) ▪ Window\Split ▪ Select Task ID ▪ In ***Task Form***, **select Task Type**: Fixed Work (Note: *Effort Driven* is selected automatically) ▪ **Enter Work estimate** in line with Resource Name, allowing for **Availability** under *Units* column. (0.5 or 50% indicates this resource will be available for this task 50% of the time). ▪ **Note** that whatever is entered in the *Work Estimate* (allowing for changes in the Units) changes the duration appropriately. 2. **Using Fixed Duration** to calculate **Work (Effort):** ▪ Window\Split ▪ Select Task ID ▪ In ***Task Form***, **select Task Type**: Fixed Duration (Note: *Effort Driven* is deselected – i.e. off)) ▪ **Enter Duration estimate** in line with Resource Name, allowing for **Availability** under *Units* column. (0.5 or 50% indicates this resource will be available for this task 50% of the time). ▪ **Note** that whatever is entered in the *Duration Estimate* (allowing for changes in the Units) changes the Work or Effort appropriately. **Note: The Scheduling Formula is**	*no impact* on the duration? **Then it is a Duration Estimate**. **In Choosing Task Type**: Always “**Fix**” the variable you **do not want** to be recalculated. **Entering a Work (Effort) Estimate:** Set **Task Type** to *Fixed Work and Effort Driven.* **Note: Summary Tasks** are always “Fixed Duration” Task Type and NOT Effort Driven. **Entering a Duration Estimate**: When entering a **Duration estimate** set **Task Type** to *Fixed Duration* and *NOT Effort Driven*. Setting ***Effort Driven*** to **NO** is important in **Fixed Duration** Task types - so Project does not treat the task as a *Fixed Work* type (Project’s default response). **Note:** Level of Effort (**LOE**) Tasks are always **Work** estimates and **Fixed Work**

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		▪ Duration = Work (Effort)/ Units **4. Use PERT (Program Evaluation Review Technique) if Possible:** • Use *Gantt Chart view* • **Select PERT Toolbar**: View\Toolbars\PERT Analysis. • **Select** on PERT Toolbar either PERT Entry Form for each Task , or, PERT Entry Sheet. • **Enter** Optimistic, Expected and Pessimistic **<u>Duration</u> Estimates.** • **Select Calculate PERT button** on Toolbar, click YES to PERT Analysis Note. • **Note** that *PERT Estimate* **overwrites** any manually entered Duration. **Note: The PERT formula is:** ▪ (WC + BC + 4(ML))/ 6	type. **PERT** estimating is by far the ***best*** approach to **estimating durations**. If there is a large difference between Best Case (BC) and Worst Case (WC) estimates then probe for possible *hidden Risk* – which should be added to the **Risk Register.**
9.	**Enter Project Budget and Optimise Schedule**	**1. Entering Project Budgets:** • **In Resource Sheet view.** ▪ In **Resource Name** field **enter Budget items** – e.g. Budget – travel, Budget – accommodation etc. ▪ Also add the Actual **Cost Resource** – e.g. Travel, accommodation etc. ▪ **Double click** on each **Budget Resource,** and in **Resource Information** box: ▪ In **General Tab,** select the **Budget** tick box**. OK.** ▪ **Select "Cost"** for Type Field. ▪ **Repeat for each Budget item** ▪ and **for each Cost Resource:** ▪ **Select "Cost"** for Type Field. **OK.** • **Select** View\Task Usage: ▪ In **Task Entry** table, right click **Duration** column and **insert columns** ▪ Repeat action to **Insert** Column Fields: "**Budget Cost" and "Cost".** ▪ **For ID 0 (Project Overall Summary Task):** ▪ **Double Click** Task Name for ID 0	**Note: Project Guide** does this later on in its process order, but the result is the same. **Type Fields** available are *Cost, Material and Work.* **For ID 0 to be visible** in the Gantt Table view the "Show Project Summary Task"

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		▪ In *Summary Task Information* box, select *Resources Tab*. ▪ Under Resource Name, for each *new blank row*, select drop down **Budget – Resource items**. OK. (See they appear now under the ID0 Task in the Task Name field). ▪ Ensure **View Zoom** is appropriate (**e.g. 3 months**) ▪ Enter **Budget figures** for **Budget Cost** in **Budget Cost Column**. ▪ **Check** main budget items are summated at top ID 0 level in Budget Cost Column**.** ▪ **On Format\Detail Styles** ▪ **Under Usage details Tab,** in Available Fields, select "Budget Cost" and **Show. OK.** ▪ **For ID 0:** ▪ **In** each **Budget - Resource items** row, on **timescale** against each quarter under the **month** in the **Budget Cost field** enter **forecast budget (e.g. 1000).** ▪ **Repeat for each Budget item.** **2. Enter Budget Costs and Time-Phased Budget Costs** • **Enter Budget Costs: Select** View\Task Usage ▪ **In Task Entry Table:** ▪ **For each Task, double click on** the Task name. In the **Task Information** on *Resource Tab* ▪ **Select** the **Cost Resource associated with that Task** (e.g. accommodation or Travel). Click OK. ▪ See that **Cost Resource** shows in Entry Table under the Task. ▪ Against each Cost Resource for the Tasks enter Cost figure in **Cost Column.** ▪ **Note total project projected cost is portrayed at ID 0.**	tick box should have been selected in Tools\Options\View Tab. **To change Zoom**, right click the Calendar side in Task Usage View to right of split and right click on the top details row, select Zoom and 3 months. Here you are setting a **Forecasted Budget Cash Flow or "Time Phased Budget"** for the whole Project. **Note:** You **can** track **Budgets** against *Work, Materials and Cost items*. You set each up in the same way as for these Budget Cost items.

<table>
<tr><th>Step</th><th>Purpose</th><th>Specific STEPS (Without using Project Guide)</th><th>Comments</th></tr>
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To enter Projected Costs for specific resources:

Double Click on Task in Task Usage View, as above.
In Summary Task Information, Resources Tab, select drop down in empty resource field the associated resource cost (e.g. meals, accommodation etc)
In cost column (still on Resource Tab) place projected overall cost.
If you wish to Time Phase the projected cost you can do so by placing the projected cost figures in the appropriate point in the Calendar details side of the Task Usage pane as you did above for the Budget Cost figures.

3. Optimise Project Schedule: Ensure all tasks are linked to their dependent predecessors (sequenced tasks and dependencies in place)

In Gantt Chart View, select Task Information dialog box (double click on any task)

Check on Predecessors Tab, see ID number of Predecessor, check logic is correct
Modify Link types if necessary: Predecessors Tab, select correct dependency in Type field – FS, SS, FF, SF.
Add Lead or Lag time if necessary: On Predecessors Tab of Task Information, in Lag field. Enter Lag (+ve) or Lead (-ve) number of days, weeks etc.

Create Deadlines for Key Tasks or Milestones:

In Gantt Chart View, select Task and double click for Task Information box, Advanced Tab, Type in deadline box, associated date for Deadline.

Create a Project Constraint: (Not recommended unless unavoidable)

In Task Information box, Advanced Tab, select appropriate Constraint Type from drop down and in Constraint Date box appropriate date.

4. Ensure Summary Tasks are NOT linked and NO “danglers” for any task

Consider how tasks may be linked in non-default state
Activate Task drivers:

Activate: In Gantt Chart view, Select Project\Task drivers

</td><td>
Note: you can link and enter link Type on the Network Diagram. Click and drag task box to the successor task. Click on link and change Type as appropriate.

Deadlines: Usually good for highlighting Key dates. See Green downward pointing Arrow in Gantt Chart – remains independent of changes to schedule and is linked to date only. When Deadline is past warning shows in Task Table Information Bar.

“Danglers” are tasks without a
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		▪ **Consider Task drivers pane** as revealed for each task. ▪ **Check through** for incorrect or missing dependencies. **5. Setting Part Time Resources:** • Double click on **Task** in Gantt Chart View. • In **Task Information**, select **Resources Tab**. • Enter Availability in **"Units"** field as appropriate – decimal (0.5) or percentage (50%). OK. **6. Check Resource Workloads: Using Resource Usage and Task Usage Views** • **Use Resource Allocation View: Select** View\More Views\Resource Allocation View. ▪ Click **Apply.** ▪ **Select *Resource Management*** Tool bar (View\Toolbars\Resource Management), ▪ On ***Resource** Management* Toolbar, select "Go to next Over-allocation" ▪ Top left pane: Shows Resource and Tasks in *Resource Usage Table* – scroll to select Red Font Resources as over-allocated. ▪ **Top Right pane:** Shows Detailed Calendar view with Details set by *Details Styles View* (Right Click on Calendar Chart Details and select Detail Styles View. Under Available fields, Select "Over-allocation, Peak Units, Remaining Availability, Unit Availability, Work Availability. If not already selected select **Cell background** as a suitable colour like yellow**. Click OK.** • **Bottom Left pane:** Task Name table for all tasks allocated to the selected resource. • **Bottom Right pane:** Gantt Chart view of Tasks in schedule showing links. • **Or, In Resource Usage View** (View\Resource Usage), **select specific resource ID** ▪ **Select** *View Table\Summary*	predecessor or successor task. In the ***Resource Usage View*** red font indicates over-allocated resource. **Note** in ***Detail Styles View*** with additional ***Available Views*** : 1. "Units Available" for work resources match "Maximum Units", even on non-work days. 2. "Work Available" equals the "Units Available" multiplied by the "Resource Calendar time available", if changes and exceptions have been made to the Resource's Calendar. 3. If **no** changes or exceptions have been made to the Resource's Calendar, then "Work Available" equals the "Units

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		▪ **Select** *Format\Detail Styles*: In dialog Box **select** in **Available fields** "Over-allocation, Peak Units, Remaining Availability, Unit Availability and Work Availability", **(Hold down Ctrl key) and "Show", OK.**
		▪ **Click "Work" column heading:**
		  ▪ **Insert Column**, in Column Definition Box, in Field Name, **select "Work Contour",** click OK.
		  ▪ **Note** against each Task allocated to a Resource *you can select* the ***Work Contour*** – Flat, back loaded, front loaded, double peak, early peak, late peak, bell, or turtle.
		▪ **On Timescale,** right click and **select** Zoom
		▪ **In Zoom dialog, select** "Entire Project". OK.
		▪ **In Resource Usage View,** right click on graph area and **ensure** "Work" and "Over-allocation" are selected with tick next to them.
		▪ **Select specific Resource** in Resource Usage Table View
		▪ **Use "Scroll to Task"** button (or Ctrl+Shit+F5) to bring over-allocations into view.
		• **Or, in Task Usage View** (View\Task Usage), **select specific task name and resource under the task**
		▪ **Select** *View Table\Summary*
		▪ **Select** *Format\Detail Styles*: In dialog Box under Usage Details**, select** in **Available fields** "Over-allocation, Peak Units, Percent Allocation", **(Hold down Ctrl key) and "Show", click OK.**
		▪ **Click "Work" column heading:**
		  ▪ **Insert Column**, in Column Definition Box, in Field Name, **select "Work Contour",** click OK.
		  ▪ **Note** against each Task allocated to a Resource *you can select* the ***Work Contour*** – Flat, back loaded, front loaded, double peak, early
			Available" multiplied by the "Project Calendar time available".
			4. Red font in the table highlights any over-allocated resources. In this case "Peak Units" exceed the "Units Available". Note that Assignments themselves may **not** show red in the table.
			
			Work Contours: The Work Contour determines how the work for an Assignment is to be *distributed* across the duration of the assignment. This will depend on your experience and judgement on when and how the work will get done over the duration of the task assigned. "Flat" (Default) suggests an equal distribution of effort over the entire task's duration. "Turtle" suggests a low initial and low ending effort on the task with the majority of the work being done in the middle period. If most of the work will be carried out in the last part of the task's duration then select "Back Loaded".
			
			Note: Resource Calendars supersede all

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		peak, late peak, bell, or turtle. ▪ **On Timescale,** right click and **select** Zoom ▪ **In Zoom dialog, select** "Entire Project". OK. ▪ **In Resource Usage View,** right click on graph area and **ensure** "Work" and "Over-allocation" are selected with tick next to them. ▪ **Select specific Resource** in Resource Usage Table View ▪ **Use "Scroll to Task"** button (or Ctrl+Shit+F5) to bring over-allocations into view. • **Resolve Resource Conflicts / Over-allocations** ▪ Where **over-allocated** (identified in red) consider "Levelling Resources" • **To Level Resources** - consider additional resources or using resources from other tasks with float, or moving tasks to ensure over-allocation is resolved. • In ***Resource Usage*** View ▪ **Select** Tools\Level Resources ▪ In **Resource Levelling** dialog box: ▪ **Select "manual"** Levelling calculations ▪ Select "Look for over-allocations on a " **day by day basis** (if using Work or Effort Estimates then Hour by Hour basis) ▪ **Select "**Clear levelling values before levelling" ▪ **Select** Level "Entire Project" ▪ **Select in Resolving over-allocations section:** ▪ **Only** "Within Available Slack/Float" **initially**, then ▪ **If still significant over-allocations select,** "Levelling can adjust individual assignments on a Task" as well. 7. **Add recurring tasks** such as regular meetings and reviews. • **In Gantt Chart View, in appropriate empty Task Name row** • **Select** Insert\Recurring Task	other Calendars in determining Resource Availability. The **Critical Path** provides you with information that enables you to focus on the tasks which have zero float (Slack) and thus cannot slip. **Note**: You can ***correct a non-continuous Critical Path*** by "switching on" **Critical Path** through the **Gantt Chart Wizard** selected at Format\Gantt Chart Wizard, then on **Formatting Toolbar** click on drop down Filter, select "Critical", Format and OK. **Checking for a Dynamic Schedule: In Gantt Chart View**, select Duration Column header, Insert Column, in Column Definition select *"Constraint*

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		• **In Recurring Task Information:** ▪ **Complete** Task Name, Duration ▪ **Under "**Recurrence pattern" section**, select** appropriate pattern ▪ **Under** "Range of recurrence" section, **select** "End after" x occurrences (at least 2 months after the current end of project initially, you can change later), or "End by" date. ▪ **Under "**Calendar for scheduling this task"**, leave as** default (i.e. None) ▪ **If a calendar is selected: tick "**scheduling ignores resource calendars" where appropriate (e.g. for meetings) ▪ **Click OK.** **8. Find Accidental Constraints:** *View\Toolbars\Formatting* • **Select on Drop Down Filter:** "Tasks with Fixed Dates." • **Double Click** on Task identified, select Advanced Tab in Task Information • **Consider** constraint for correctness. **9. Final Check: Ensure all Project Management** and **Risk Response actions** are included**.** **10. View Critical Path:** *Menu: Format\Gantt Chart Wizard,* • **Select** *Critical Path, Next, select information required to view.* • **Format** *it and exit wizard.* **11. View Slack or Float:** In Gantt View**.** • **Select** *Menu: View\More Views\Detail Gantt* • **View "**Levelling Delay Column" **12. Create OBS** (Organisational Breakdown Structure): • In **Resource Sheet**, select Tools\Customise\Fields • In **Custom Fields** box, in Type box, select **Outline Code**. • In **Field** list, select **Outline Code 1** • Under **Custom Attributes**, click **Lookup.** • In "**Edit Lookup Table for Outline Code 1**" dialog box, in **Code Mask**, click the **"plus**	*Type"*. Best fit. OK. **Check for any dependency type** that is **not** *"As Soon as Possible"* in the Task Information Advanced Tab of the end Task before the break. Correct to ASAP dependency and then Click OK. **Check** by increasing "threshold for task criticality" to 2 and check to see all critical tasks are continuous now. (Tools\Options\ Calculation tab), Return to previous menu and reselect 0. Click OK.

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		sign (+)" to expand selection • Click **Edit mask** button. In "**Code Mask definition for Outline Code 1"** dialog box, in **Sequence** field, in next blank row, select **"Characters"** from drop down list. Press ENTER. Add additional levels as appropriate. OK. • In **"Edit Lookup Table for Outline Code 1"** field, under **Value**, enter Departments as appropriate. • **Select** all Departments under Top Level and select **Indent** button in Formatting Toolbar. Close. OK. • **In Resource Sheet** views, in **Type** column, right click, and select **Insert Column**. • **In column definition box**, in **Field name**, select **Outline Code 1. OK.** • **For each resource:** Under **Outline Code 1,** select **Dept** as appropriate.	
10.	**Change Formats of Text Styles and Timescale and Gridlines**	**1. Formatting Text Styles:** • **In Gantt Chart View:** • **Select** Format\Text styles • ***In Text Styles dialog box*:** In item to change list, select item to change (e.g. Milestone), choose font size, background colour and pattern. **Click OK**. **2. Formatting Timescale:** • **Select** Format\Timescale • ***In Timescale dialog box*: Select** to suit. • **Click OK.** **3. Formatting Gridlines:** • **Select Format\Gridlines** • ***In Gridline dialog box:* Select "*sheet rows"*** in "Lines to Change". • In normal section, in colour list **select** colour to suit. • **Click OK.** **4. Formatting links and Bars:** • **Select** Format\Layout	

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		• ***In Layout dialog box*: Select** to suit.
		• **Click OK.**
		• **In Network Diagram View:**
		  ▪ **Select** Format\Layout
		  ▪ ***In Layout dialog box*, click "**allow manual box positioning"**, click** "show link labels", **click** "Hide all fields except ID", **click OK.**	

11.	**Link or attach more task information to the Tasks**	1. **Additional Information:** Notes can be added or hyperlinks added to the "Information" column. • **Notes:** Double click tasks and insert notes under notes tab of Task Information. • **Hyperlinks:** In Indicator column right click and click on Hyperlink. • **Documents or Images:** Double click tasks and insert "Object" under notes tab of Task Information. Select to create from file and browse to file. • Insert, then check box "Display as icon" and click OK. The OK.	**Documents and Images** do not show as more than a yellow symbol with two apostrophes. To see the document go to the Notes field of the Task.

12.	**Add Columns of Custom Information**	1. **Adding a custom Text Column called Deliverables:** If you wish to **add a column** called *"Deliverables"* to write in the Key Deliverable for that Task or set of activities:
		• **Select** Tools\Customise\fields
		  ▪ Select type of Table (Task or Resource) and field
		  ▪ Select actual field you wish to Customise – select "text 1" in this case.
		  ▪ Rename the field "Key Deliverables"
		  ▪ Customise the field as required, OK.
		• **In** the *Task Table, Detail Gantt View*: Right click a column heading and select Insert Columns
		  ▪ Select the field you have just created, name it Key deliverables
		  ▪ Select position of text in column and whether to select "Best Fit". OK.
		2. **Adding a column to show Status in Gantt View:**
		•	

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13.	**Set Project Baseline & Check Project Statistics**	• **Set the Project Baseline**: ○ Menu: Tools\Tracking\Save Baseline ○ Select entire project (Yes, usually) or selected tasks (Rarely), OK. • **Check Project Statistics**: Menu: Project\Project information\ Statistics button	

14.	**Prepare Views and Reports**	• **View Tracking Gantt:** *Menu: View\Tracking Gantt*
		• **Print a Report:** *Menu: Report\Reports*
		• **Visual Reports**: *Menu: Report\Visual Reports*
		• **Export Costs Data to Excel:** *Menu: File\Save As*
		  • Select *Excel Workbook* from *Save As* Type drop down. Save.
		  • Export Wizard starts. Selected Data. Next. Use existing Map. Next. Select types of data and Excel options. Next. Finish.
		• **Copy a picture of Gantt Chart into Word Document:** Menu: View\Gantt Chart (Close Project Guide if necessary)
		  • Use horizontal and Vertical scroll bars to reveal all tasks
		  • *On Standard Toolbar Options, click Copy Picture*
		  • *In render image area, select For Printer. In copy area select Rows on Screen.*
		  • *In Timescale's area's From drop down list box, type date and in the To, type date. OK.*
		  • *Start Microsoft Word – open Report Document. Move Insertion point to place in the document.*
		  • *Choose Edit\Paste.*
		• **Identify Slipping Tasks**
		  • *On Formatting Toolbar, on Toolbar Options, display Filter drop down, select Slipping Tasks*
		• **Creating a Custom Combination View**: *Menu: View\More Views*
		  • *Click New, select either Single View or Combination View. OK*
		  • Select Combination View. Provide new Combination View. Select the view to be	

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		displayed in top pane. • Select the view to be displayed in the bottom pane. • Select if you want this to be listed in Views Menu. • **Create a Custom Report** • Menu: View\Reports • Select Custom and click Select. • Create custom report using one of the following methods: ▪ Click New, select report type (Task, Resource, Monthly Calendar, Crosstab) ▪ From existing report – Select the existing report on which you wish to base your custom report and click Copy. • Define Report elements (name. period, table, and any filters), add details and options, click OK.	

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