



Microsoft Office Project Tips and Tricks

Part 1 of 3

Author: Andy Jessop
andyj@projectlearning.net

Contents

Project preliminaries	2
Harmonise your times and dates	2
Categorise your costs	2
Planning the work	3
Manage the project's structure.....	3
Understand task durations	3
Link it all together.....	3
Reviewing the schedule	4
Use more than one table.....	4
Let Microsoft Project highlight schedule changes.....	4
Continued to part 2.....	4

For additional information about Project Mentor, please go to:

http://www.projectlearning.net/project_mentor.htm

MICROSOFT OFFICE PROJECT 2007 TIPS AND TRICKS

Project preliminaries

1 Harmonise your times and dates

To avoid having tasks starting or finishing at strange times of the day, get an understanding of how Microsoft Project schedules working time.

- Using a minute as the smallest time increment, SUPPLY for time is set within the Change Working Time dialog.
- DEMAND for time is set within the Calendar tab of the Options dialog.
- Ensure that Default Start/End Time and your Standard calendar settings match.

Note: To temporarily display time and date, change the Date Format setting within the View bar of the Options dialog

Project Mentor users	Step-by-step instructions:	Lesson A3 Defining calendars and resources
	Detailed explanations:	Reference A3.1 Working with calendars

2 Categorise your costs

Keep control of fixed costs and project budgets by creating Cost and Budget resources:

- Use Lookup Tables for cost categorization.
- Assign costs directly against tasks.
- Assign budgets to the Project Summary Task

Note: Assign Budget Resources in the Task Usage view. Add the Budget Cost field to enter budget cost values.

Project Mentor users	Step-by-step instructions:	Lesson A3 Defining calendars and resources
	Detailed explanations:	Reference A3. Creating a resource pool Reference A3.3 Defining individual resources Reference D4.1 Using materials and money

MICROSOFT OFFICE PROJECT 2007 TIPS AND TRICKS

Planning the work

3 Manage the project's structure

Use Microsoft Project's outlining feature to your advantage:

- Consider a 'rolling wave' approach to your planning with attention detail in the near future and broad-brush planning for the longer term.
- Create Milestones at key decision or expenditure points.
- Use Responsibility Matrices for complex projects.

Note: Check correct outline positions by using the Outline Number field or by selecting Show Outline Number from the View tab of the Options dialog.

Project Mentor users	Step-by-step instructions:	Lesson B1 Creating a task outline
	Detailed explanations:	Reference B1.1 Defining a project's outline Reference B1.2 Refining an outline Reference F1.3 Creating and applying custom fields

4 Understand task durations

Gain benefits by using task durations to your advantage:

- Sketch duration values by dragging and dropping task bars (use an appropriate timescale granularity).
- Define durations relative to the task's point in the project's lifecycle.
- Use Estimated Durations for far-off tasks.

Note: Don't use Elapsed Time for tasks with resources assigned as this will expect work to be scheduled 24/7.

Project Mentor users	Step-by-step instructions:	Lesson B2 Detailed task definition
	Detailed explanations:	Reference B2.2 Tasks and durations

5 Link it all together

Keep your schedule accurate by creating dependencies between related tasks:

- Drag and drop links with care, or use the Link Tasks tool button. Avoid creating links within the Predecessors column.
- Avoid 'dangling' tasks.
- Create complex task relationships by using Lead and Lag values.
- Use the Task Form and Relationship Diagram views in a Split Window to review dependencies.

Note: Link to and from Summary Tasks with care. Aim to have each task possessing BOTH a predecessor and a successor.

Project Mentor users	Step-by-step instructions:	Lesson B2 Detailed task definition Lesson B3 Reviewing structure and sequence Lesson E2 Constraining when tasks occur
	Detailed explanations:	Reference B2.3 Creating links between tasks Reference B3.2 Reviewing the sequence of tasks Reference E2.1 Changing task dependencies

MICROSOFT OFFICE PROJECT 2007 TIPS AND TRICKS

Reviewing the schedule

6 Use more than one table

Don't just use the Entry table as a 'one size fits all'; use a variety of tables and understand the fields that they contain:

- Use the Schedule table to review dates, Variance to aid replanning and so on.
- Understand fields and how they are calculated by asking for Help.
- Create your own custom tables rather than constantly inserting or removing columns from commonly-used tables. Remember that it's easier to copy and rename an existing table than creating new tables completely from scratch.

Note: Each table can have its own date format; which can be very useful in finding detailed schedule changes.

Project Mentor users	Step-by-step instructions:	Lesson C1 Viewing information within tables Lesson F2 Using task views and resource views
	Detailed explanations:	Reference C1.1 Modifying the look of tables Reference F2.1 Managing views and tables

7 Let Microsoft Project highlight schedule changes

Don't try and guess why a schedule has changed; find out explicitly why tasks happen when they do:

- Apply a suitable table (containing appropriate fields), then use Change Highlighting to highlight how changes affect a schedule.
- Use Task Drivers to explain why tasks start when they do.
- Use Multiple-Level Undo for what-if scenarios.
- If you have custom spotlight indicators - use them.

Note: You can customise the amount of Undo levels within the General tab of the Options dialog box. Remember that saving to disk clears the Undo buffer.

Project Mentor users	Step-by-step instructions:	Lesson B2 Detailed task definition Lesson C2 Displaying the project's schedule
	Detailed explanations:	Reference B2.2 Tasks and durations Reference B2.3 Creating links between tasks Reference C2.1 Displaying a critical path

Continued to part 2...