



Microsoft Office Project Tips and Tricks

Part 2 of 3

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For additional information about Project Mentor, please go to:

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

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Reviewing the schedule (continued from part 1)

8 Don't just rely on the default Gantt chart view

The Gantt Chart view can't do everything, so don't expect it to. Create your own custom views and use them as and when you need.

- Understand the variations of the Gantt chart (Detail Gantt, Tracking Gantt, Leveling Gantt). Edit these views or create new custom views from them.
- Understand how Bar Styles are drawn. Use these styles to provide valuable schedule information.
- Create views optimized for the screen and for hard copy. Provide information relevant to each recipient.

Note: Each view contains its own individual Text Styles as well as bar styles; which in turn control the Legend shown when a view is printed.

Project Mentor users	Step-by-step instructions:	Lesson C1 Viewing information within tables Lesson C2 Displaying the project's schedule Lesson F2 Using task views and resource views
	Detailed explanations:	Reference C1.2 Formatting the look of text Reference C2.1 Displaying a critical path Reference F2.1 Managing views and tables

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Assigning people and costs

9 Get to grips with Effort-Driven tasks

Tasks that are driven by work effort are the default scheduling option within Microsoft Project, yet they provide a high level of frustration for users – until how they work is understood:

- Unless work has already been defined for a task, it is calculated by the INITIAL resource assignment.
- Subsequent assignments share the task's total work.
- Use a Task Form to review (and change) assignment detail.

Note: It's much better to set Effort Driven on or off before assignments are made to tasks. Do this within the Task Form, The Advanced tab of the Task Information dialog or within a custom Table.

Project Mentor users	Step-by-step instructions:	Lesson D1 Creating resource assignments Lesson D2 Manipulating resource assignments
	Detailed explanations:	Reference D1.2 Multiple assignments Reference D2.2 Using effort driven task

10 Use Task Types to accurately schedule work

To try and ensure resources aren't overbooked against individual tasks, the default scheduling option is for a task's Assigned Units to be a constant (fixed) value. Whilst this can be useful, changing a task's type to suit how it will be scheduled has some distinct benefits.

- Tasks that are subcontracted, yet have resources often have fixed durations.
- Tasks where the work on them is interchangeable are usually fixed work in type. Fixed work tasks are also Effort Driven.
- When seeing the result of a task type change, use a Task Form. Changes to a task's type will reflect subsequent scheduling calculations.

Note: Changes to the Default Task Type (within the Schedule tab of the Options dialog box) will only affect newly-created tasks. You can use the Multiple Task Information dialog to change the type of several tasks at once.

Project Mentor users	Step-by-step instructions:	Lesson D2 Manipulating resource assignments
	Detailed explanations:	Reference D2.1 Using task types

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Managing external influences

11 Choosing and using constraints

Constraints are invaluable for fixing tasks or milestones to given dates. They should, however be treated with care:

- Whenever you have constraints (or deadlines) against tasks; document them. Use a note to explain WHY the constraint exists.
- Keep constraints up to date. Although this seems to be stating the obvious, incorrect date constraints can have serious effects on the schedule of tasks and resources assigned to those tasks.
- Don't create constraints by accident! Dragging a task bar or entering in a start date against a task will give it a SNET constraint

Note: Be aware that the constraint icon is only visible in tables that include the Indicators field. Use the Tasks With Fixed Dates filter to find tasks that are constrained and use the Constraint Dates table to review and edit constraints. Consider editing the filter to also find deadlines and also add the Deadline field to the table. For Inter-project constraints see tip 21.

Project Mentor users	Step-by-step instructions:	Lesson E2 Constraining when tasks occur
	Detailed explanations:	Reference E2.2 Applying task constraints Reference E2.4 Finding tasks with constraints

12 Constraining resource supply

There are two basic ways to constrain the supply of resources to the project:

- If you edit a resource's personal calendar, you affect the amount of working time they have for project tasks. Therefore tasks are always scheduled around resource calendar availability.
- If you change a resource's Availability Profile (within the Resource Information dialog), you change the Max Units value for that resource. This will not automatically reschedule work, but it will flag a resource conflict if assigned units are scheduled at a greater value than max units for any given time period.

Note: Tasks rescheduled by resource calendars can be difficult to spot; especially if multiple resources are assigned to a task. Use the Task Usage view to see timephased work values and the Resource Schedule details of the Task Form to review start and finish dates for assignments.

Project Mentor users	Step-by-step instructions:	Lesson E3 Applying constraints to resources
	Detailed explanations:	Reference E3.1 Restricting resource supply Reference E2.4 Finding tasks with constraints

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Viewing, analysing and reporting

13 Creating lookup tables for data analysis

Microsoft Project has powerful database capabilities that can be really useful, especially when working with large single multi-discipline projects or in a multi-project environment:

- Before creating lookup tables, consider your project's reporting requirements. Create lookup tables based on how you need to slice-and-dice information (see tip 15).
- In Microsoft Project desktop there are separate custom fields (and hence lookup tables) for both tasks and resources. You may therefore need two distinct lookup tables, each containing the same values. In Microsoft EPM, common lookup tables can be shared by tasks, resources and projects.
- Although custom fields can be reviewed in the Task Information and Resource Information dialog boxes, adding the field to a custom table is a better way to review and edit lookup table values against tasks or resources.

Note: Single-level lookup tables can be applied to simple Text fields. If you use an Outline Code, you can apply a Code Mask, which creates a hierarchical lookup table (e.g. A.1, A.2, B.1 etc.). Avoid cutting and pasting lookup table entries.

Project Mentor users	Step-by-step instructions:	Lesson F1 Filtering and manipulating project data
	Detailed explanations:	Reference F1.3 Creating and applying custom fields

14 Creatively using filters and groups

Another area of Microsoft Project that is underused is its grouping and filtering capabilities:

- Familiarise yourself with the pre-defined Global filters. Remember that there are separate filters for both tasks and resources.
- There are few pre-defined Groups within Microsoft Project, but it is easy to create your own. Just consider the field (a lookup table for example) that you wish to group against. Don't forget that work and cost values can be subtotaled by group.
- If a filter doesn't exist; create your own. Simply display the field(s) you wish to filter against and use AutoFilter.

Note: AutoFilters are temporary - unless you save them. To review a filter definition, use Project > Filtered For > More Filters.

Project Mentor users	Step-by-step instructions:	Lesson F1 Filtering and manipulating project data
	Detailed explanations:	Reference F1.1 Using global filters Reference F1.2 Creative use of AutoFilter Reference F1.4 Intelligently using sort criteria

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