

MICROSOFT OFFICE PROJECT 2007 TIPS AND TRICKS



Microsoft Office Project Tips and Tricks

Part 3 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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Viewing, analysing and reporting (continued from part 2)

15 Using visual reports

If you use Excel 2003/2007 or Visio 2007, you can also analyse project data using Visual Reports:

- Visual reports create PivotTables and PivotDiagrams. You can therefore sort and filter data once exported.
- Visual reports use OLAP technology similar to that used in Microsoft EPM. The ability to slice-and-dice across portfolios and create detailed management dashboards is all part of the EPM suite.

Note: You can also add custom fields to visual reports. If added as a Dimension, this field can then become a sort or filter key (e.g. grouping and subtotaling by cost area)

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| Project Mentor users | Step-by-step instructions: | Lesson F4 Utilizing reports |
| | Detailed explanations: | Reference F4.3 Visual reports |

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Optimising people and plans

16 Resource conflicts: Finding where how and why

Resource conflicts are an inevitable consequence of planning projects. Before instigating Resource Leveling (see below), aim to find out where conflicts exist and what is causing them:

- In any resource-based view, the Overallocated Resources filter will select resource demand exceeds supply.
- In the Resource Usage view, timephased values and assignment detail (task names italicised) will identify where conflicts may lie.
- To see if parallel tasks are the cause of conflict (usually the case); apply the Leveling Gantt view in a lower pane. Add the Remaining Availability detail style to the Resource Usage view to see where assignments conflict with Availability Profiles.

Note: The Resource Management toolbar provides some useful tools to find and manage resource conflicts.

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| Project Mentor users | Step-by-step instructions: | Lesson G1 Comparing resource supply with demand |
| | Detailed explanations: | Reference G1.1 Dealing with resource conflicts Reference G1.2 How to find resource conflicts |

17 What leveling can and can't do

Resource Levelling is a powerful (if often misused) tool within Microsoft Project:

- Firstly, Resource Levelling is not a cure-all. If you have assigned units > max units, then leveling can't help with this as it CANNOT edit assigned unit or assigned work values. You can do this by editing the assignment directly.
- Consider leveling granularity. If you aren't assigning down to hours/minutes within the day, why level based on that type of detail? Changing to look for overallocations on a week-by-week basis may ignore conflicts that aren't really conflicts at all.
- Most people level the entire project. If you are using 'rolling wave' planning (see tip 3), or you expect future tasks to change, only level to a date where you have a confident expectation of how things will be progressed.
- If you have a fixed project end date, level within available slack. Remember that by default, tasks honour any constraint dates applied.

Note: Look to save before and after resource leveling (especially with versions that don't have multiple undo/redo). Understand how the Leveling Gantt view is made up; as it provides useful leveling comparisons.

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| Project Mentor users | Step-by-step instructions: | Lesson G2 Using leveling to resolve conflicts |
| | Detailed explanations: | Reference G2.1 General leveling parameters Reference G2.2 Detailed leveling parameters Reference G2.3 Reviewing the effects of leveling |

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Progressing and replanning

18 Tracking actuals and rescheduling work

Many projects are planned but not tracked. If you don't track, how can you manage? To track effectively:

- Understand the Status Date and track around it.
- Use actuals and estimates to complete in preference to simple %complete tracking.
- Remember to reschedule uncompleted work after the Status Date.

Note Use the Tracking table for entering actual, with a Task Form displaying Resource Work details for assignment-level entries. Better still, capture actuals at source using PWA.

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| Project Mentor users | Step-by-step instructions: | Lesson H1 Establishing baseline information Lesson H2 Managing time-based progress |
| | Detailed explanations: | Reference H1.3 Setting update boundaries Reference H2.1 Task update information Reference H2.2 Updating tasks with time-based progress Reference H3.2 Rescheduling remaining work |

19 Finding slippages using multiple baselines

Valuable variance information can be found by comparing a plan's current schedule with one (or more) baselines. With variances known, more effective replanning decisions can be made:

- Familiarise yourself with Filters to quickly find what has slipped and why.
- Use stoplight indicators for variance analysis.
- Use the Project Center and Dashboards in PWA to find programme-wide variances and then drill down to task level to find detail.

Note: If your project is one of many, have standardised approach to compare similar projects. Use Templates or the Organizer to copy common components between projects. Better still, EPM provides a shared environment, which can be optimized to enable meaningful programme-wide performance measures.

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| Project Mentor users | Step-by-step instructions: | Lesson H1 Establishing baseline information Lesson I1 Consequences of a project update |
| | Detailed explanations: | Reference H1.1 Creating baselines Reference H1.3 Displaying progress information Reference I1.1 Looking for schedule variances Reference I1.2 Filtering and grouping by schedule status |

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Multiple project environments

20 Share resources across projects with Resource Pools

Powerful and flexible multi-project schedules can be created by having projects share resources from a common pool:

- Only have resources local to one project if they are used by that project and no other. Keep all resource definitions within the pool file (project).
- Don't move sharer projects to different folders or rename them. This is a common cause of assignment duplication within shared pools. To manage shares, open the pool project and use the Share Resources dialog.
- When a project shares resources, task-based views will display tasks just within that project. Resource-based views show work scheduled across all sharer projects. You will only be able to edit assignment detail in projects that you have open.

Note: Be aware that Availability Profiles and Resource Calendars are not project-specific. Any reduction in resource availability will affect ALL projects that share from the pool.

If you are serious about sharing resources across multiple projects, use Microsoft EPM. The design and inbuilt security within this database helps to optimise cross-project resource utilisation.

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| Project Mentor users | Step-by-step instructions: | Lesson J2 Sharing resources across projects |
| | Detailed explanations: | Reference J2.1 Creating and applying a resource pool Reference J2.2 Managing resource pools |

21 Link tasks between projects – with care

Having cross-project links is a powerful way to manage project boundaries and control intricate schedules. Care should however be taken:

- If you are using dynamic cross-project links, dependant projects will always be scheduled by driver projects; i.e. following the direction of the link. Thus a delay to one project can have a knock-on effect to another.
- If automatic rescheduling isn't desirable, use give and get milestones. Firstly, use a custom field (e.g. a flag) to identify these milestones. Create these milestones and use a note as a narrative. Constrain Give tasks with FNLT or MFO constraints of an agreed date and Get tasks with SNET or MSO constraints based upon the agreed date. Link these milestones to or from relevant project tasks and baseline them. If a Give date cannot be met, you'll see a schedule conflict in predecessor tasks. If you are slipping against a Get date in your project, you can also see schedule conflicts or slippages. In all cases, understand WHO is responsible for give and get dates and maintain a regular dialogue with them.

Note: Flags can be used to control bar styles in chart views. Thus give and get milestones can be clearly identified. If you are using dynamic inter-project links, these are displayed as grey External Tasks bars.

Within Microsoft EPM, inter-project dependencies are managed very effectively using Deliverables and Dependencies. These are easy to establish and provide both necessary control and also effective management reporting.

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| Project Mentor users | Step-by-step instructions: | Lesson J1 Consolidating separate projects |
| | Detailed explanations: | Reference J1.1 Creating and managing a consolidated project Reference J1.2 Reporting on a consolidated project |