

Covers Microsoft Project 2010 Professional
Companion Web Site

Elaine Marmel

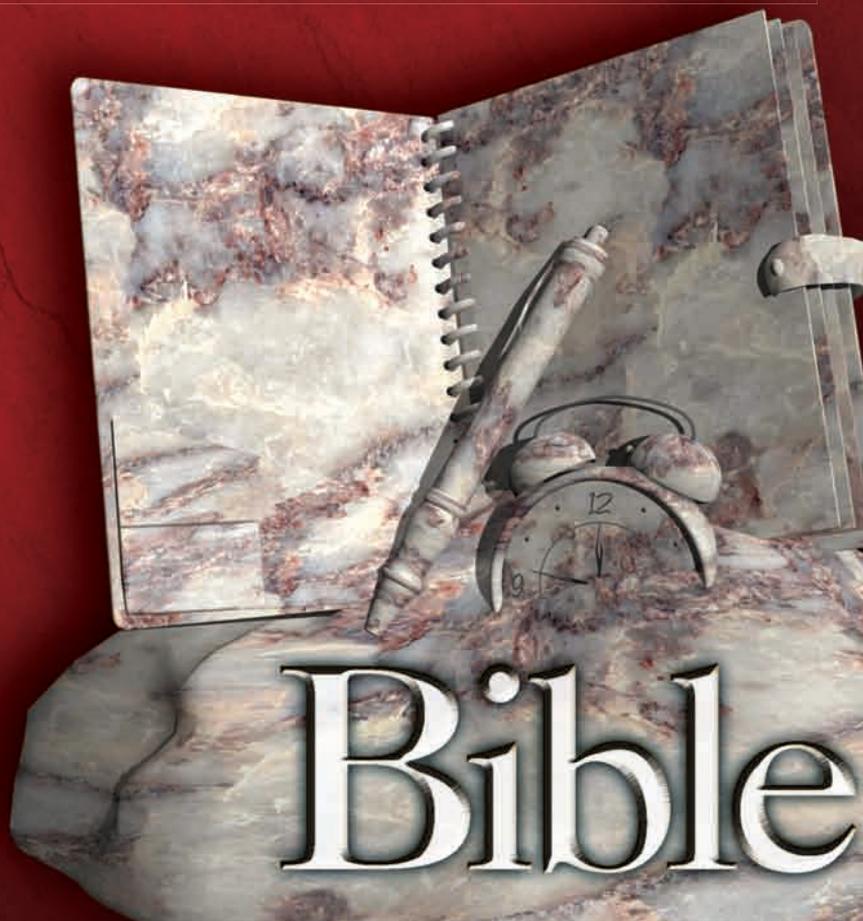
Microsoft®

Project 2010

Manage your projects
more effectively

Plan, implement, track,
and analyze

Harness Project Server
and Project Web App



The book you need to succeed!

Project 2010 Bible

Elaine Marmel



WILEY

Wiley Publishing, Inc.

Project 2010 Bible

Published by
Wiley Publishing, Inc.
10475 Crosspoint Boulevard
Indianapolis, IN 46256
www.wiley.com

Copyright © 2010 by Wiley Publishing, Inc., Indianapolis, Indiana

Library of Congress Control Number: 2010928471

Published simultaneously in Canada

ISBN: 978-0-470-50131-3

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEB SITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEB SITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services or to obtain technical support, please contact our Customer Care Department within the U.S. at (877) 762-2974, outside the U.S. at (317) 572-3993 or fax (317) 572-4002.

Trademarks: Wiley, the Wiley logo, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates, in the United States and other countries, and may not be used without written permission. Microsoft is a registered trademark of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners. Wiley Publishing, Inc. is not associated with any product or vendor mentioned in this book.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

*To my brother and sister-in-law, Jim and Mariann Marmel,
who always believe in me, and to the memories of my mother
Susan Marmel (1914-2003) and my father Harry Marmel
(1914-1985), who always made me feel loved and cherished.*

About the Author

Elaine Marmel is President of Marmel Enterprises, LLC, an organization that specializes in technical writing and software training. Elaine has an MBA from Cornell University and worked on projects to build financial management systems for New York City and Washington, D.C. This prior experience provided the foundation for Marmel Enterprises, LLC to help small businesses implement computerized accounting systems.

Elaine left her native Chicago for the warmer climes of Arizona (by way of Cincinnati, OH; Jerusalem, Israel; Ithaca, NY; Washington, D.C.; and Tampa, FL) where she basks in the sun with her PC and her dog Josh and her cats, Cato, Watson, and Buddy, and sings barbershop harmony with the 2006 International Championship Scottsdale Chorus.

Elaine spends most of her time writing; she has authored and co-authored more than 50 books about Microsoft Project, Microsoft Excel, Microsoft Word for Windows, Microsoft Word for the Mac, QuickBooks, Peachtree, Quicken for Windows, Quicken for DOS, Windows 98, 1-2-3 for Windows, and Lotus Notes. From 1994 to 2006, she also was the contributing editor to monthly publications *Peachtree Extra* and *QuickBooks Extra*.

Credits

Project Editor

Rebecca Huehls

Acquisitions Editor

Kyle Looper

Technical Editor

Brian Kennemer

Senior Copy Editor

Barry Childs-Helton

Editorial Manager

Leah Cameron

Editorial Director

Mary C. Corder

Vice President and Executive Group

Publisher

Richard Swadley

Vice President and Publisher

Andy Cummings

Senior Project Coordinator

Kristie Rees

Media Development Project Manager

Laura Moss

**Media Development Assistant Project
Manager**

Jenny Swisher

Media Development Associate Producers

Josh Frank

Shawn Patrick

Doug Kuhn

Marilyn Hummel

Proofreading and Indexing

Sossity R. Smith

Potomac Indexing, LLC

Contents at a Glance

Part I: Project Management Basics	1
Chapter 1: The Nature of Projects.....	3
Chapter 2: Exploring the Microsoft Project Environment.....	21
Part II: Getting Your Project Going	39
Chapter 3: Creating a New Project.....	41
Chapter 4: Building Tasks.....	91
Chapter 5: Creating Resources and Assigning Costs.....	131
Part III: Getting Information about Projects.	167
Chapter 6: Understanding the Basics of Views.....	169
Chapter 7: Using Views to Gain Perspective.....	211
Chapter 8: Modifying the Appearance of Your Project.....	257
Chapter 9: Reporting on Progress.....	293
Part IV: Refining Your Project	339
Chapter 10: Resolving Scheduling Problems.....	341
Chapter 11: Resolving Resource Problems.....	369
Part V: Tracking Your Progress	399
Chapter 12: Understanding Tracking.....	401
Chapter 13: Recording Actuals.....	415
Chapter 14: Ways to Review Progress.....	447
Chapter 15: Analyzing Financial Progress.....	465
Part VI: Advanced Microsoft Project	487
Chapter 16: Customizing Microsoft Project.....	489
Chapter 17: Using Macros to Speed Your Work.....	517
Chapter 18: Importing and Exporting Project Information.....	539
Part VII: Working in Groups.	563
Chapter 19: Coordinating Multiple Projects Outside Project Server.....	565
Chapter 20: Preparing to Use Project Server.....	601
Chapter 21: Project Server and the Administrator.....	615

Chapter 22: Project Server and the Project Manager	655
Chapter 23: Project Server and the Day-to-Day User.....	693
Chapter 24: Project Server and the Executive	723
Part VIII: Appendices	741
Appendix A: What's on the Web Site.....	743
Appendix B: Project Management Worksheet	749
Appendix C: Available Fields and Functions for Custom Field Formulas.....	759
Appendix D: Project Management Resources	775
Appendix E: Glossary	783
Index	789

Contents

Part I: Project Management Basics	1
Chapter 1: The Nature of Projects	3
Understanding Projects	3
Exploring project management	4
Critical path and slack	5
Durations and milestones	6
Fixed-duration tasks and resource-driven schedules	7
Diagrams that aid project management	8
Dependencies	11
Managing projects with project management software	11
What's required of you	12
How Microsoft Project can help	12
The Life Cycle of a Project	14
Identifying your goal and the project's scope	14
Planning	15
Revising	16
Tracking	17
Learning from your mistakes	18
Summary	19
Chapter 2: Exploring the Microsoft Project Environment	21
Taking a First Look at Project	21
Starting Project	22
Using the Ribbon	24
Introducing the Quick Access Toolbar (QAT)	26
Working with the Mini Toolbar	27
Understanding Backstage view	28
Examining the Gantt Chart view	29
Changing views	33
What's New in Project 2010	35
Summary	37

Part II: Getting Your Project Going **39**

Chapter 3: Creating a New Project **41**

Gathering Information	41
Determining detail tasks	42
Establishing time limits	43
Lining up your resources	43
Looking at dependencies	44
Opening a Project File	44
Opening a project file — the usual way	44
Other ways to start projects	44
Opening projects	44
Establishing Basic Project Information	47
Looking at Project Calendars	50
Setting calendar options	50
Setting schedule options	52
Creating a new calendar	54
Adjusting the calendar	56
Working with Tasks	59
Entering tasks	60
Adding detail tasks	62
Adding tasks to the timeline	66
Manual or automatic scheduling?	67
Creating manually scheduled tasks	69
Switching a task's scheduling mode	72
Setting the default scheduling mode	73
Saving Project Files	74
Saving files	74
Saving files as templates	76
Protecting files	76
Closing Project	77
Working with a Project Outline	78
Adjusting tasks in an outline	78
Copying tasks	80
Displaying and hiding tasks	84
Getting Help	86
Using the Help system	86
Finding online help	89
Summary	90

Chapter 4: Building Tasks **91**

Establishing Timing for Tasks	92
Fixed Unit tasks	92
Fixed Work tasks	93

Fixed Duration tasks	94
Effort-driven tasks	94
Changing Task Type Default Behavior	95
Assigning Task Timing	96
Using the Gantt table	96
Using the Task Information dialog box	98
Using your mouse and the task bar	100
Setting scheduling options	101
Assigning a calendar to a task	102
Creating milestones	103
Timing for summary tasks	104
Using Recurring Tasks	107
Establishing Constraints and	
Deadline Dates	110
Understanding constraints	110
Using deadline dates	110
Setting constraints and deadline dates	111
Entering Task Notes	112
Establishing Dependencies Among Tasks	115
Understanding dependencies	115
Understanding the interactions between	
constraints and dependencies	115
Allowing for delays and overlap	116
Dependency types	118
Finish-to-Start (FS)	119
Start-to-Finish (SF)	120
Start-to-Start (SS)	122
Finish-to-Finish (FF)	122
Establishing dependencies	123
Setting finish-to-start dependencies	124
Setting other types of dependencies	125
Viewing Dependencies	126
Deleting Dependencies	128
Summary	129

Chapter 5: Creating Resources and Assigning Costs 131

Understanding Resources	131
How resources function in Project	133
How Project uses resource information	
to affect the schedule	133
How Project gathers cost information	134
Creating a Resource List	134
Modifying Resource Information	138
Assigning a communication method	138
Specifying resource availability	139

Contents

Specifying a booking type	139
Creating a Generic resource and assigning custom fields	140
Creating a budget resource	141
Adding notes to a resource	143
Calendars and resources	144
Modifying a resource's working hours	145
Blocking off vacation time	146
Assigning Resources to Tasks	148
Assigning resources to tasks	148
Assigning a budget resource	150
Getting help while selecting resources to assign	152
Some tips about resource assignments	156
Removing or replacing a resource assignment	157
Handling Unusual Cost Situations	158
Looking at the project's cost	158
Assigning fixed costs	159
Assigning a fixed cost to a task	159
Assigning a fixed resource cost to a task	161
Accounting for resource rate changes	163
Summary	166

Part III: Getting Information about Projects **167**

Chapter 6: Understanding the Basics of Views **169**

What Is a View?	169
Changing a table	170
Changing a Details section	172
Examining Indicators	173
Admiring the Views	174
Calendar	175
Detail Gantt	176
Gantt Chart	177
Gantt with Timeline	178
Leveling Gantt	179
Tracking Gantt	180
Multiple Baselines Gantt	182
Network Diagram	183
Descriptive Network Diagram	188
Relationship Diagram	189
Resource Allocation	189
Resource Form	191
Resource Graph	192
Resource Name Form	193
Resource Sheet	194

Resource Usage	195
Rollup views.....	196
Enabling rollup behavior	197
Using the summary task bar	197
Task Details Form	201
Task Entry.....	202
Task Form.....	202
Task Name Form.....	203
Task Sheet.....	204
Task Usage.....	204
Team Planner	206
Timeline.....	208
Summary	210
Chapter 7: Using Views to Gain Perspective.	211
Customizing Views	211
Changing tables.....	211
Changing row height and column width	211
Hiding and inserting columns	215
Adding fields to a usage view.....	217
Switching tables	219
Creating new tables or editing existing tables	220
Working with views	223
Adjusting the timescale.....	224
Adding views.....	228
Creating a combination view	229
Ordering Tasks in a View.....	231
Sorting tasks.....	231
Creating WBS codes.....	233
Renumbering WBS codes	237
Defining outline numbers.....	239
Filtering Views to Gain Perspective	243
Applying a filter to a view.....	246
Creating custom filters	248
Using AutoFilters	249
Using grouping	250
Summary	255
Chapter 8: Modifying the Appearance of Your Project.	257
Changing Project's Looks	257
Using the Gantt Chart Wizard.....	258
Formatting Elements One by One.....	263
Working with text	263
Formatting selected text	263
Applying formatting to categories of text	264

Contents

Changing task bars.....	266
Formatting task bars.....	266
Changing the color of task bars.....	270
Changing the layout of the Gantt Chart.....	272
Changing gridlines.....	274
Changing network diagrams.....	275
Formatting nodes in a network diagram.....	275
Modifying node box styles.....	276
Formatting fields that appear on nodes.....	277
Changing the layout of the network diagram.....	280
Formatting the Calendar view.....	282
Formatting the Calendar entries.....	283
Changing the Calendar layout.....	284
Inserting Visuals.....	286
Copying pictures.....	287
Using visuals in schedules.....	289
Summary.....	292

Chapter 9: Reporting on Progress 293

Setting Up to Print a View or Report.....	293
Creating Text Reports.....	298
Looking at the big picture.....	300
Project Summary.....	300
Top Level Tasks.....	300
Critical Tasks.....	302
Milestones.....	302
Working Days.....	302
Generating reports on costs.....	303
Cash Flow.....	304
Earned Value.....	305
Budget.....	306
Overbudget reports.....	307
Producing reports related to time.....	308
Unstarted Tasks.....	308
Tasks Starting Soon.....	309
Tasks in Progress.....	310
Completed Tasks.....	311
Should Have Started Tasks.....	311
Slipping Tasks.....	312
Preparing reports on work assignments.....	312
Who Does What.....	313
Who Does What When.....	314
To Do List.....	314
Overallocated Resources.....	315

Reporting on workloads	315
Task Usage	316
Resource Usage	317
Customizing reports	318
Task report	318
Resource report	319
Crosstab report	319
Customizing an existing report	321
Taking Advantage of Visual Reporting	323
Task Usage reports	324
Resource Usage reports	325
Cash Flow Report	325
Resource Availability Report	325
Resource Cost Summary Report	325
Resource Work Availability Report	327
Resource Work Summary Report	327
Assignment Usage reports	327
Baseline Cost Report	328
Baseline Report	328
Baseline Work Report	330
Budget Cost Report	330
Budget Work Report	330
Earned Value Over Time Report	330
Summary reports	332
Critical Tasks Status Report	332
Task Status Report	332
Resource Remaining Work Report	332
Resource Status Report	334
Customizing visual report templates	334
Summary	337

Part IV: Refining Your Project 339

Chapter 10: Resolving Scheduling Problems 341

Identifying Scheduling Problems	341
Working with Warnings and Suggestions	342
Using the Task Inspector	344
Resolving Scheduling Conflicts	345
Adding resources to tasks	346
Using overtime	346
Adding time to tasks	347
Making a task inactive	349
Adjusting slack	350
Changing task constraints	352

Contents

Adjusting dependencies	354
Splitting a task	356
Using the Critical Path to Shorten a Project.....	358
Identifying the critical path	359
Using formatting to identify the critical path	359
Using filters to identify the critical path	361
Shortening the critical path	362
Using multiple critical paths.....	366
Summary	368
Chapter 11: Resolving Resource Problems.	369
Understanding How Resource Conflicts Occur	369
Spotting Resource Conflicts	370
Using views to spot resource conflicts	370
Using filters to spot resource conflicts	374
Resolving Conflicts	376
Changing resource allocations	376
Switching resources	378
Adding a task assignment to a resource	381
Adding or deleting a resource assignment.....	382
Scheduling overtime.....	383
Redefining a resource's calendar.....	384
Assigning part-time work	386
Controlling when resources start working on a task	388
Delaying tasks by leveling resource workloads	389
Letting Project level resource loads.....	389
Making adjustments to leveling	392
Contouring resources	393
Setting a contour pattern	395
Contouring a resource's availability	397
Pooling resources	397
Summary	398
Part V: Tracking Your Progress	399
Chapter 12: Understanding Tracking	401
Understanding the Principles of Tracking	402
Estimates versus actuals	402
Making adjustments as you go	403
Using Baselines	404
What is a baseline?	404
Setting a baseline.....	405

Changing the Baseline	408
Adding a task to a baseline	408
Using interim plans	409
Clearing a baseline or interim plan	411
Understanding Tracking Strategies	411
Tackling the work of tracking	412
Keeping track of tracking	412
Summary	413
Chapter 13: Recording Actuals	415
Organizing the Updating Process	415
Understanding Calculation Options	417
Setting the Project Status Date	420
Updating Tasks to Reflect Actual Information	421
Setting actual start and finish dates	421
Recording actual durations	423
Setting the Percent Complete value	424
Setting work completed	426
Setting remaining durations	428
Recording progress for manually scheduled tasks	429
Actuals and Costs	433
Using the Cost table for tasks	434
Using the Cost table for resources	435
Overriding resource cost valuations	435
Techniques and Tips for Updating	438
Using timephased fields efficiently	438
Accelerating the updating process	442
Letting Project reschedule uncompleted work	443
Summary	445
Chapter 14: Ways to Review Progress.	447
Viewing Tasks That Are Slipping	447
Viewing with Baseline Information	448
Taking Advantage of the Tracking Gantt View	450
Interpreting the Tracking Gantt view	450
The Tracking table	451
Using Tables to View Progress	452
The Task Variance table	452
The Task Cost table	453
The Task Work table	454
The Resource Work table	455
Viewing Progress Lines	456
Comparing Versions of Projects	458
Summary	464

Contents

Chapter 15: Analyzing Financial Progress	465
Understanding Earned Value	465
Understanding earned value fields.....	466
Using the Physical % Complete method to calculate earned value	467
Setting the date for earned-value calculations	469
Using Earned Value tables	470
Using the Earned Value table for tasks.....	471
Using the Earned Value table for resources.....	472
Using the Earned Value Cost Indicators and Earned Value Schedule Indicators tables	473
Evaluating Cost Information	474
Charting earned value	474
Using PivotTables for analysis	481
Making Adjustments During the Project.....	485
Changing the schedule	485
Modifying resource assignments.....	485
Summary	486
Part VI: Advanced Microsoft Project	487
Chapter 16: Customizing Microsoft Project	489
Modifying Project's Behavior and Interface.....	489
Customizing the status bar	489
Setting levels of Undo.....	490
Windows taskbar icons	492
Saving Project files	493
Using the Organizer	494
Customizing the Quick Access Toolbar	495
Changing the placement of the QAT.....	495
Adding buttons to and removing buttons from the QAT	496
Customizing the Ribbon.....	498
Hiding and displaying buttons	498
Adding pre-defined groups to a Ribbon tab	498
Creating your own Ribbon group	500
Creating your own Ribbon tab.....	504
Using Custom Fields.....	506
Customizing data entry	506
Creating a custom field.....	507
Using a custom field for data entry	509
Using formulas in custom fields	511
Summary	516

Chapter 17: Using Macros to Speed Your Work 517

Using Macros 517

Recording Macros 518

Running Macros..... 521

Using Shortcuts to Run Macros..... 522

 Adding a macro to the Ribbon..... 523

 Assigning a macro to a Quick Access Toolbar button 525

 Assigning a keyboard shortcut to a macro 528

Creating VBA Code 530

 Recording a macro to create a filter for critical tasks 530

 Editing the macro to show only specified resources..... 533

 Testing the code..... 536

Summary 538

Chapter 18: Importing and Exporting Project Information 539

Using Copy and Paste 539

 Copying Project data into other Office programs..... 539

 Copying data from other Office programs into Project 543

Exporting Information 544

 Saving reporting information in an OLAP Cube or an Access database 545

 Exporting Project data 547

Importing Information..... 554

 Bringing Excel workbook or Access database information into Project 555

 Bringing Outlook task lists into Project 557

 Importing other files 558

Troubleshooting..... 558

 Project imports incorrect times in data from Microsoft Excel..... 559

 Linked or embedded objects don't import or export 559

 The export file contains more or less information than expected..... 559

 Project imports invalid information..... 560

 The values of imported information change 560

 The imported project is empty 560

 Project displays imported information in the wrong fields..... 560

Summary 561

Part VII: Working in Groups 563

Chapter 19: Coordinating Multiple Projects Outside Project Server . . . 565

Consolidating Projects 565

 Preparing to use consolidation 566

 Inserting a project 568

 Using inserted projects and their source files..... 573

 Consolidating all open projects: A shortcut 574

 Moving subprojects within a consolidated project 575

Contents

Understanding Consolidated Projects and Dependencies	576
Linking tasks across projects	576
Changing links across projects	578
Consolidated projects: To save or not to save	579
Viewing Multiple Projects	581
Viewing the Critical Path across Projects	582
Sharing Resources Among Projects.....	585
Creating a resource pool and sharing the resources	586
Opening a project that uses a resource pool	587
Updating information in the resource pool.....	588
Quit sharing resources	589
Collaborating Using SharePoint	591
Setting up a list for project tasks.....	592
Synchronizing a SharePoint Project Task List with Project	594
Summary	600
Chapter 20: Preparing to Use Project Server	601
Understanding Project Server and Project Web App	601
Planning the Implementation	604
Software requirements.....	605
Hardware requirements.....	605
Assessing the network environment	606
Considering software/hardware scenarios.....	606
Assessing organizational requirements	607
Identify the people who will approve the Project Server design	608
Identify staff members to interview.....	608
Create a requirements definition questionnaire.....	608
Conduct interviews	609
Calculate ROI.....	609
Designing the system.....	609
Establishing and enforcing organizational standards.....	610
Training	612
Developing a strategy for implementation and configuration.....	612
Avoiding the Pitfalls.....	613
Summary	614
Chapter 21: Project Server and the Administrator	615
Specifying Project Server Features for Your Organization	616
Managing Security Settings	619
Managing security templates	619
Managing groups.....	621
Working with categories	623
Managing Users	625
Working with Views	628

Working with the Enterprise Global Template	630
Working with the Enterprise Global.....	630
Defining Enterprise custom fields.....	632
Creating Enterprise calendars.....	633
Setting Up and Editing Enterprise Resources.....	634
Creating the Enterprise Resource Pool.....	635
Editing resources in the Enterprise Resource Pool.....	637
Managing Timesheet and Task Settings.....	638
Timesheet Periods.....	638
Line classifications.....	638
Timesheet Settings and Defaults.....	639
Task Settings and Display.....	639
Setting Up Administrative Time	640
Customizing Project Web App.....	641
Control the appearance of the Quick Launch pane.....	641
Selecting the Gantt taskbar styles and timescales.....	642
Selecting grouping formats.....	643
Setting Up Project Detail Pages	643
Establishing Enterprise Project Types.....	645
Workflow Phases and Stages.....	646
Housekeeping Chores	647
Checking in enterprise projects and resources.....	647
Managing information in the Project Server databases.....	648
Backing up and restoring.....	649
Managing the queue.....	649
Managing the OLAP cube.....	650
Managing operations.....	651
Summary	653

Chapter 22: Project Server and the Project Manager 655

Using Project Web App to Manage Projects.....	656
Updating a schedule in Project Web App.....	656
Saving changes.....	659
Assigning resources using Project Web App.....	660
Opening a published project in Project Professional.....	664
Working with Web-Based Projects in Project Professional.....	666
Connecting to Project Server.....	666
Creating a Project Server login account.....	667
Logging in to Project Server from Project Professional.....	668
Enabling task reassignment for team members.....	670
Storing a draft project in the Project Server database.....	671
Publishing project information.....	671

Contents

Opening a project	672
Understanding the Open dialog box	673
Opening a draft project or a published project	673
Closing a project stored in the Project Server database	674
Assigning Resources to Projects.....	675
Adding enterprise resources to your project	675
Replacing generic resources with real resources.....	677
Notifying resources of assignments.....	678
Using the Resource Substitution Wizard	678
Tracking Progress	682
Setting up status reports.....	683
Receiving updates from team members	685
Reviewing and updating the project workflow	686
Handling project issues and risks	689
Summary	691
Chapter 23: Project Server and the Day-to-Day User	693
Logging on to Project Web App	694
Reviewing the Home Page	694
Customizing the Home Page	695
Viewing and Recording Information.....	699
Working with your tasks.....	700
Entering time on tasks.....	700
Submitting task updates	702
Adding tasks.....	703
Reassigning a task.....	705
Working with your timesheet.....	707
Entering time.....	710
Saving timesheet entries	710
Reporting administrative time.....	711
Submitting a Project Proposal	711
Working with Documents.....	715
Reporting Status.....	719
Summary	721
Chapter 24: Project Server and the Executive	723
Logging into Project Web App	723
Using Workflows to Manage Projects	724
Analyzing Possible Project Portfolios.....	728
Reviewing the Driver Library.....	728
Prioritizing business drivers	730

Creating a portfolio	732
Viewing the results of the analysis	734
Analyzing and adjusting the cost	734
Evaluating resource constraints	736
Summary	740

Part VIII: Appendices 741

Appendix A: What’s on the Web Site 743

Software Products	743
Planview Open Suite for Microsoft Project	743
Graneda	744
Hans Tff TimeReg 98.....	744
Innate Multi-Project	744
Innate Timesheets	745
Innate Resource Management Software	745
Milestones	745
PERT Chart EXPERT	745
WBS Chart for Project	746
Project Kickstart Pro.....	746
ProjectCommander	746
Enterprise Advantage Toolset	746
Project Connect Online	747
EPM Live.....	747
Organizations, Web Sites, and Blogs	747
Microsoft Project Users Group (MPUG)	747
Brian Smith’s Microsoft Office Project Support Blog.....	747
Christophe Fiessinger’s Blog.....	747
Microsoft Project Team Blog.....	748
The Project Management Institute	748
ProjectManagement.com	748
Project Sample Files	748

Appendix B: Project Management Worksheet 749

Phase I: Research	749
Phase II: Planning	751
Phase III: Creating Your Project Schedule	754
Checklist for creating a project schedule	754
Phase IV: Tracking Your Project.....	755
Tracking procedures checklist.....	755
Phase V: Preparing for the Next Project.....	755

Contents

Appendix C: Available Fields and Functions for Custom Field Formulas	759
Appendix D: Project Management Resources	775
Associations	775
Publications	778
Books	779
Journals and magazines	780
Online.....	780
Software Products	781
Appendix E: Project Management Resources Glossary	783
Index	789

Acknowledgments

No man (or woman) is an island, and this book is the product of the efforts of several people. Thank you, Kyle Looper, for your support and for making things smooth and easy and for having faith in me. Thank you, Rebecca Huehls, for keeping me on track and keeping me sane, and for keeping the manuscript readable. Thank you, Brian Kennemer, for trying to keep me technically accurate. And last, but not least, my thanks also go to the Web site team at Wiley for producing the companion Web site for this book.

Introduction

Managing projects can be as exciting as scheduling the next space shuttle or as mundane as planning routine production-line maintenance. A project can be as rewarding as striking oil or as disastrous as the maiden voyage of the *Titanic*. Projects can have budgets of \$5 or \$5,000,000. One thing that all projects have in common, however, is their potential for success or failure — the promise that if you do it right, you'll accomplish your goal.

Why You Need This Book

Microsoft Project is a tool for implementing project management principles and practices that can help you succeed. That's why this book provides not only the information about which buttons to press and where to type project dates but also the conceptual framework to make computerized project management work for you.

How this book is designed

This book strives to offer real-world examples of projects from many industries and disciplines. You'll see yourself and your own projects somewhere in this book. A wealth of tips and advice show you how to address, control, and overcome real-world constraints. The book is designed to work for you in two ways:

- **As a tutorial.** You can use *Project 2010 Bible* as a linear tool to learn Project — from the ground up.
- **As a reference.** You can put it on the shelf and use it as your Project reference book, to be pulled down as needed — for advice, information, and step-by-step procedures.

Either way, this book will enrich your Microsoft Project experience and make you a better project manager.

Whom this book is for

Project management software is unlike word processing or spreadsheet software; many of you may have come to project management software never having used anything quite like it before. You may also have used earlier versions of Project or other project management software.

- **If you're new to project management:** This book is for you. The early chapters explain the basic concepts of computerized project management and what it can do for you so that you have a context in which to learn Project.

Introduction

- **If you're experienced with project management:** This book is also for you. It explains what's new in the latest version of Project and shows you techniques for using the software that you may not have considered before.

You will benefit most from this book if you have at least a basic understanding of the Windows environment, have mastered standard Windows software conventions, and are comfortable using a mouse. But beyond that, you need only the desire to succeed as a project manager, which this book will help you do.

The Special Features of This Book

To help you maximize your use of this book, I've included many special features in its design and conception. The following sections show how they work.

Formatting conventions

To streamline your learning experience, I've used the following formatting conventions:

- **Text you're asked to type:** When you're asked to enter text into a Project schedule, for example, it appears in **boldface**.
- **When using the mouse:** A click indicates a left mouse-button click and right-click indicates a right mouse-button click. Double-click designates two quick, successive clicks of the left mouse button.
- **Keystroke combinations:** These look like this: Alt+Tab. Hold down the first key and, without letting it go, press the second key.
- **Menu commands:** These are shown with the command arrow — for example, Choose File ↗ Open.
- **New terms:** When a new term or concept is introduced, it appears in *italics*.

Margin icons

Throughout the book, I've included special icons in the margins to call your attention to added information, shortcuts and advice, warnings about potentially disastrous courses of action, the new features of Project 2010, references to additional wisdom, and what you'll find on the Web site that accompanies this book. Here's how they look:

Note

The **Note icon** signals additional information about a point under discussion or background information that may be of interest to you. ■

Tip

A **tip** is a bit of advice or a hint to save you time and indicate the best way to get things done. ■