Microsoft Project In 16 Minutes Flat

PLUS – My MS Project 2010 Menu graphics and Shortcut Guide

...and **20 Hot Tips** To Resolve Schedule and Resource Problems!

David Geoffrey Litten

MS Project 2010 Top 10 Tips

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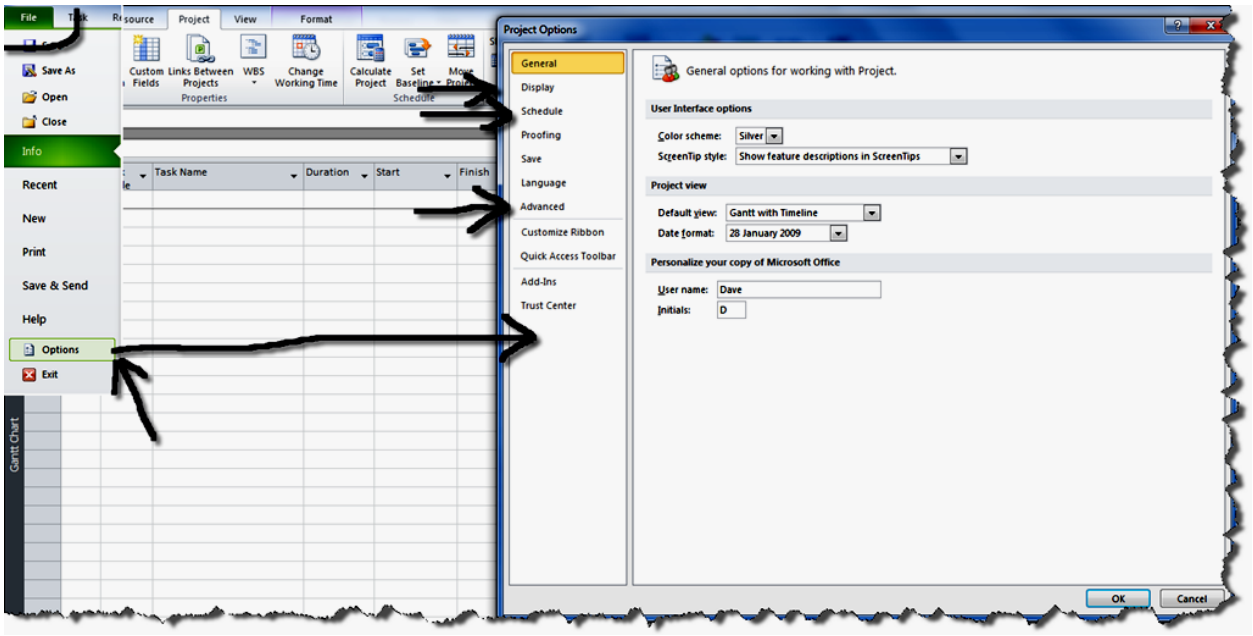
Using Microsoft Project 2010 In 16 Minutes Flat

I have created this fast-track Video to give you a simplified overview of MS Project 2010 to build your confidence, and to help you resolve some of the Scheduling and Resourcing problems that you will encounter in any project.

Have these steps printed out as you watch the video:

12 Simple Steps:

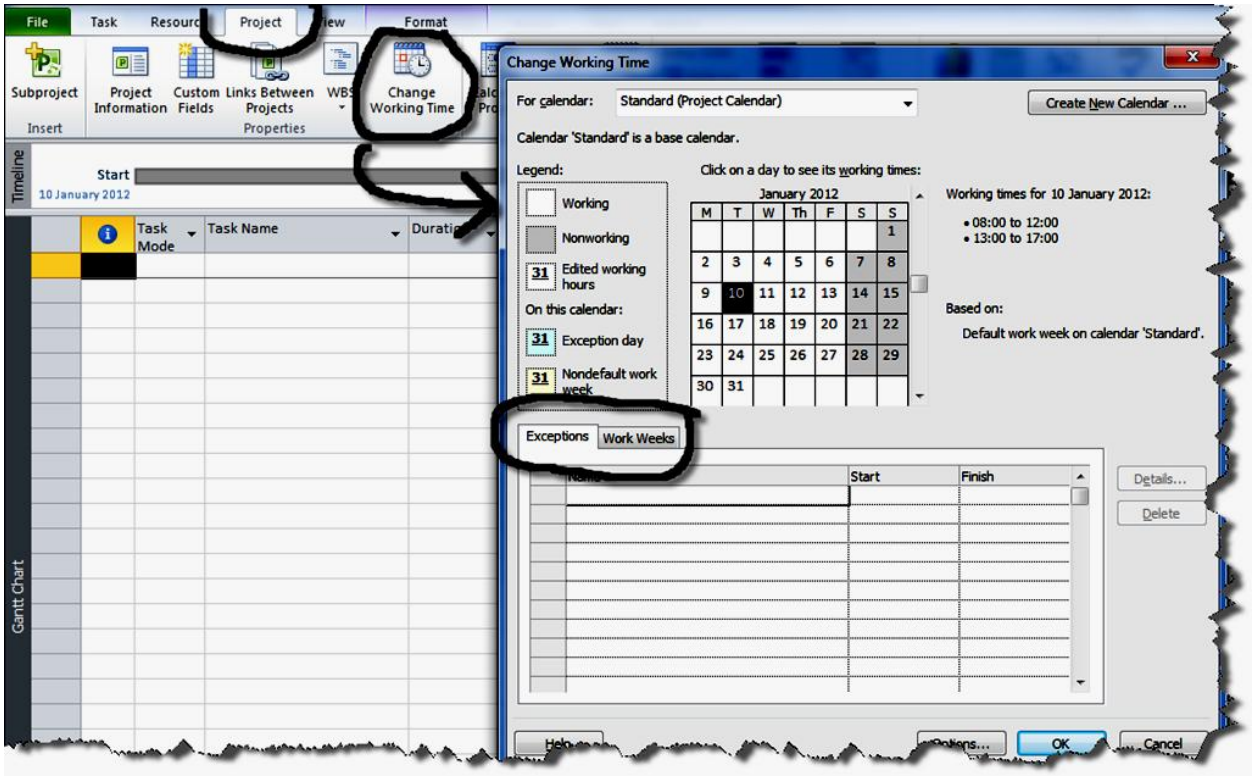
1. **Enter project information using Project | Project Information**



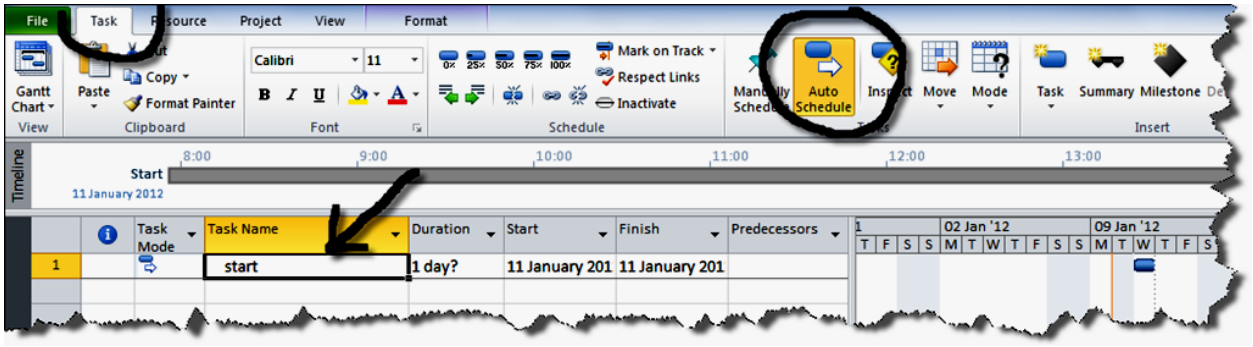
2. **Set default settings in File | Options**

   (in the dialog box above for Display, Schedule and Advanced tabs)

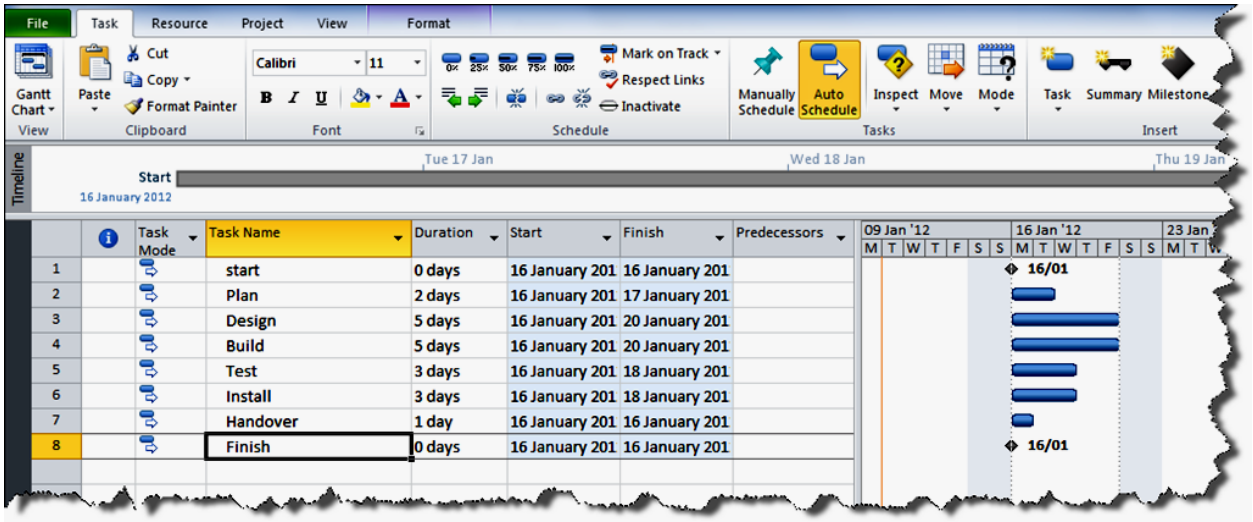
3. **Set up/modify your Project Calendar Project | Change Working Time**



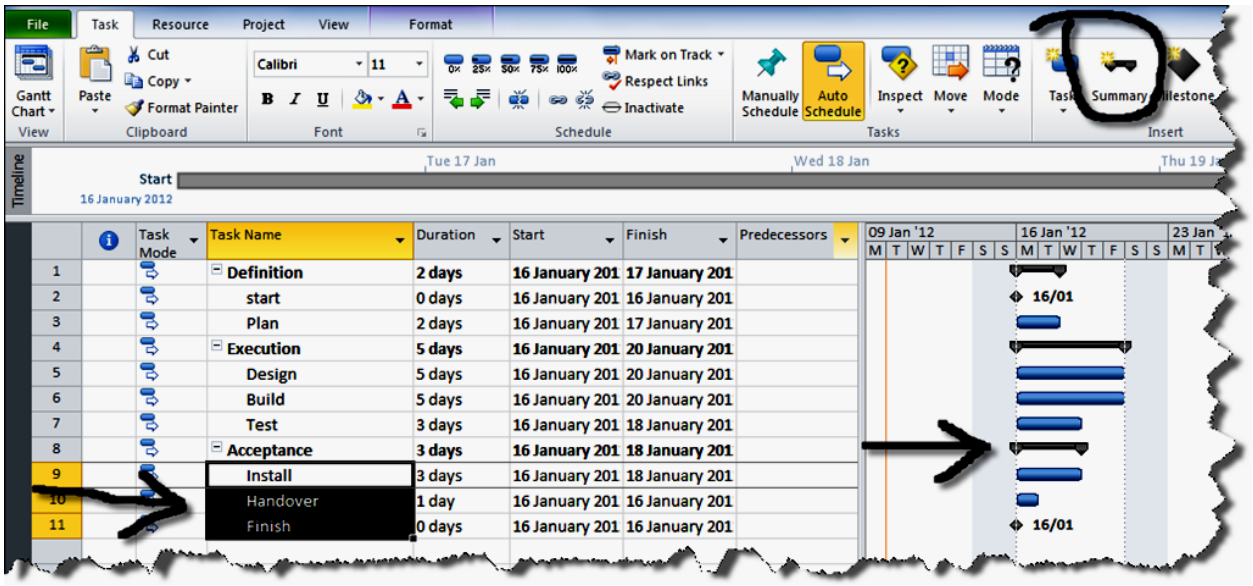
4. **Set the scheduling method to Auto Schedule (Task | Auto Schedule – enter a task name first, or go to schedule tab in previous step and set to Auto Schedule)**



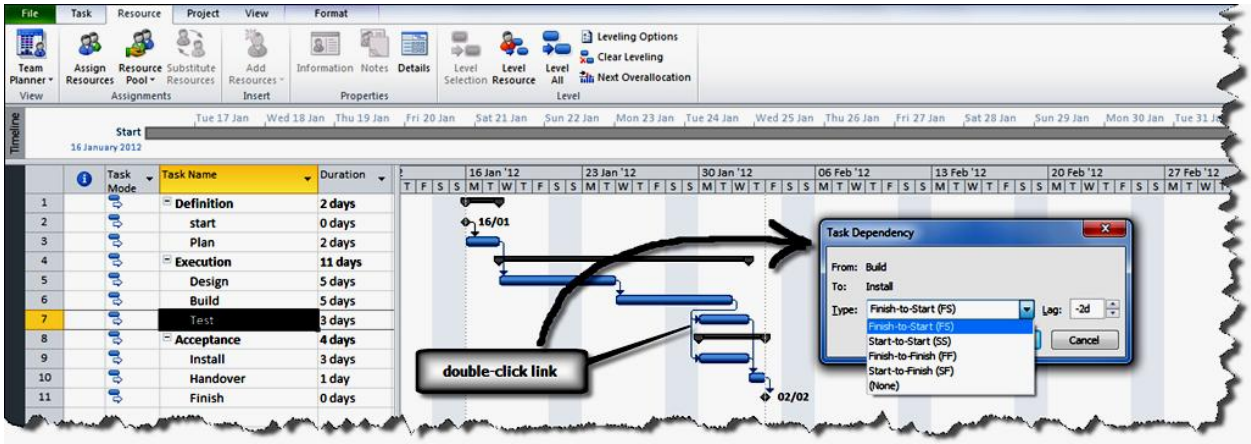
5. **Enter your tasks, their information, and durations (don't forget milestones) in the Gantt View (double-click task name for Task Information box)**



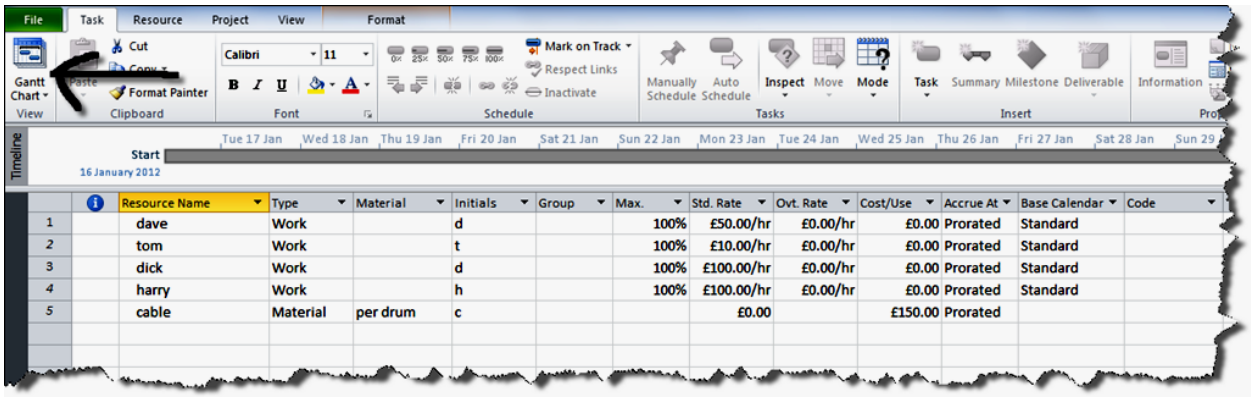
6. **Set up your outline structure in your project to add summary task bars (Task tab)**



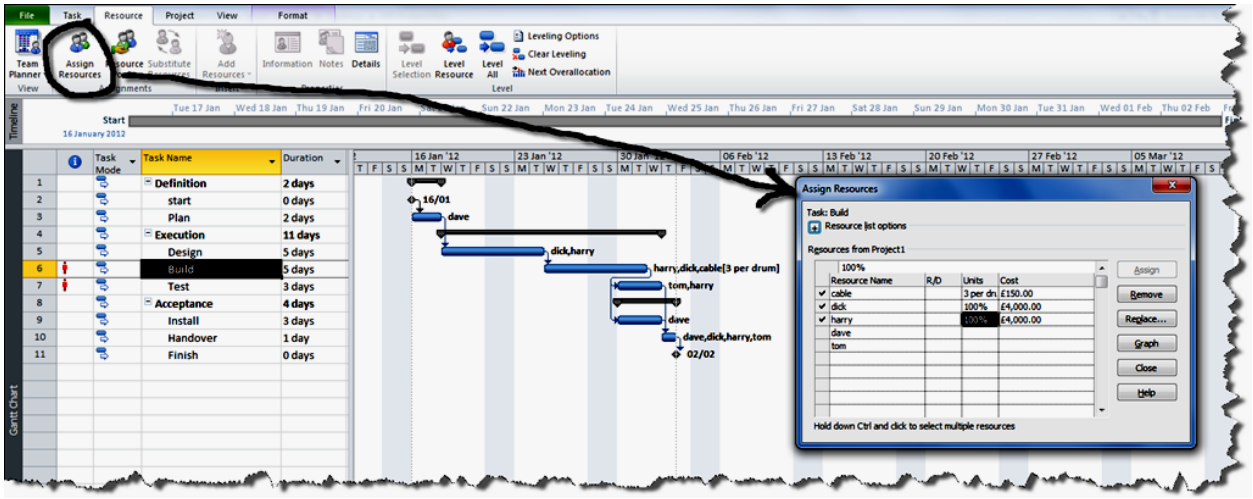
7. Add task dependencies including any internal and external constraints

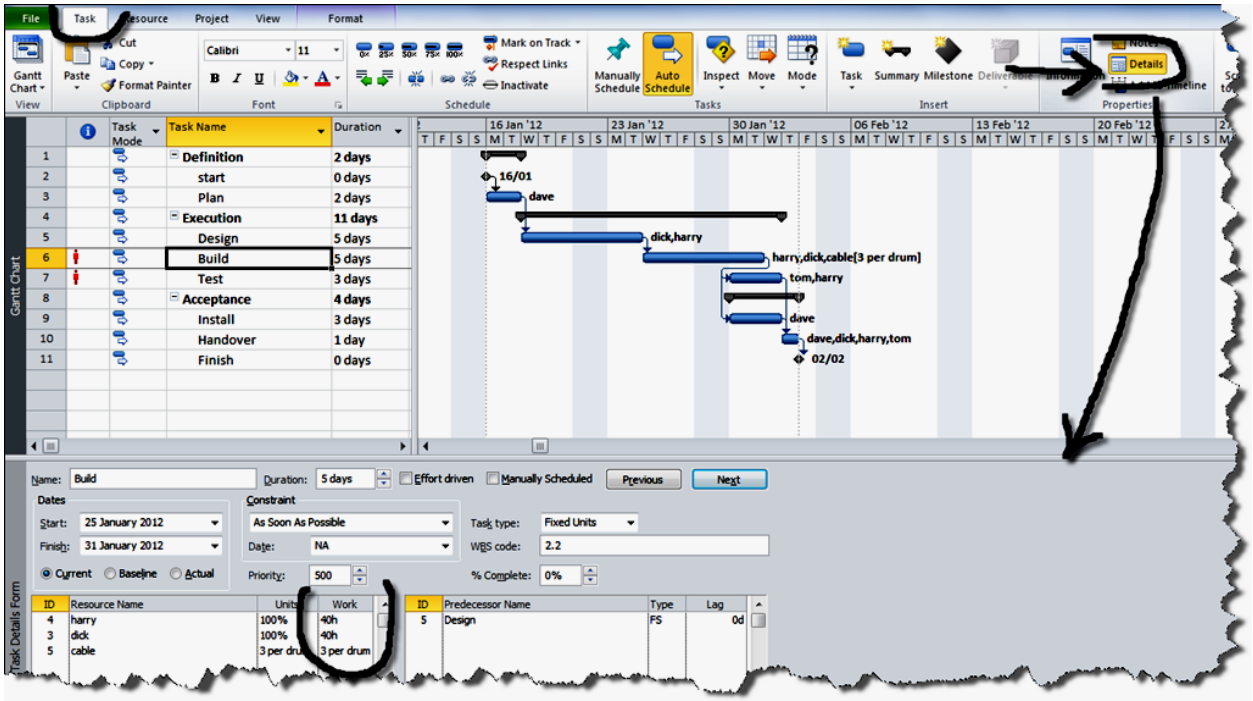


8. Set up your resource pool and their details in the Resource Sheet view.

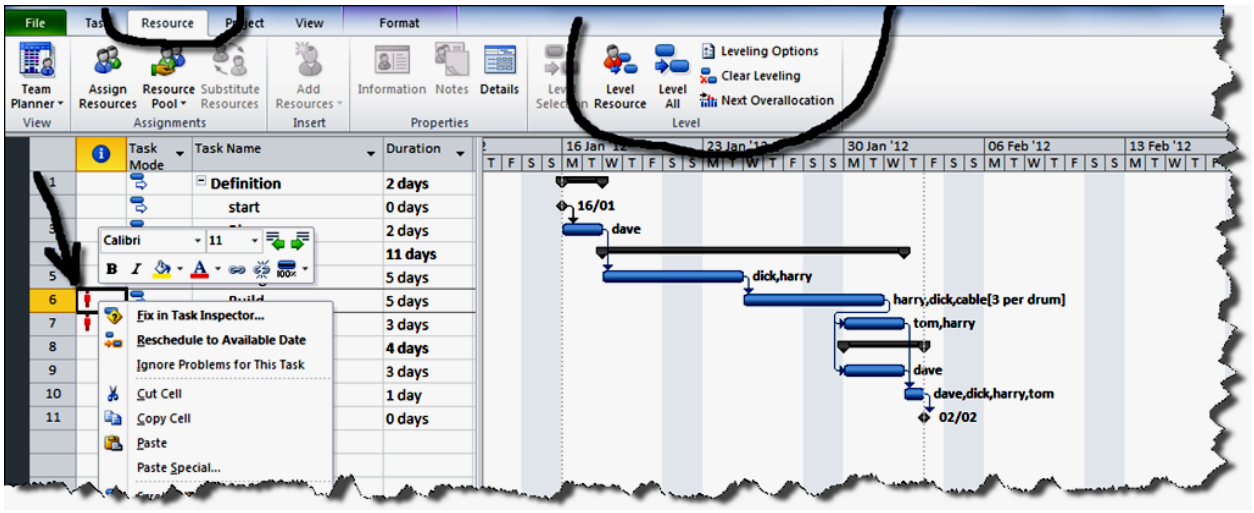


9. Assign resources to tasks, set their work effort, and add any fixed costs.

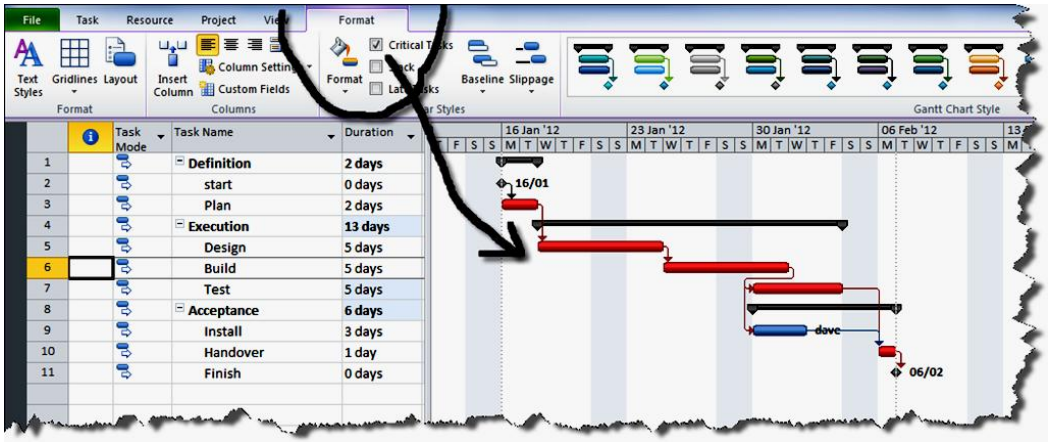


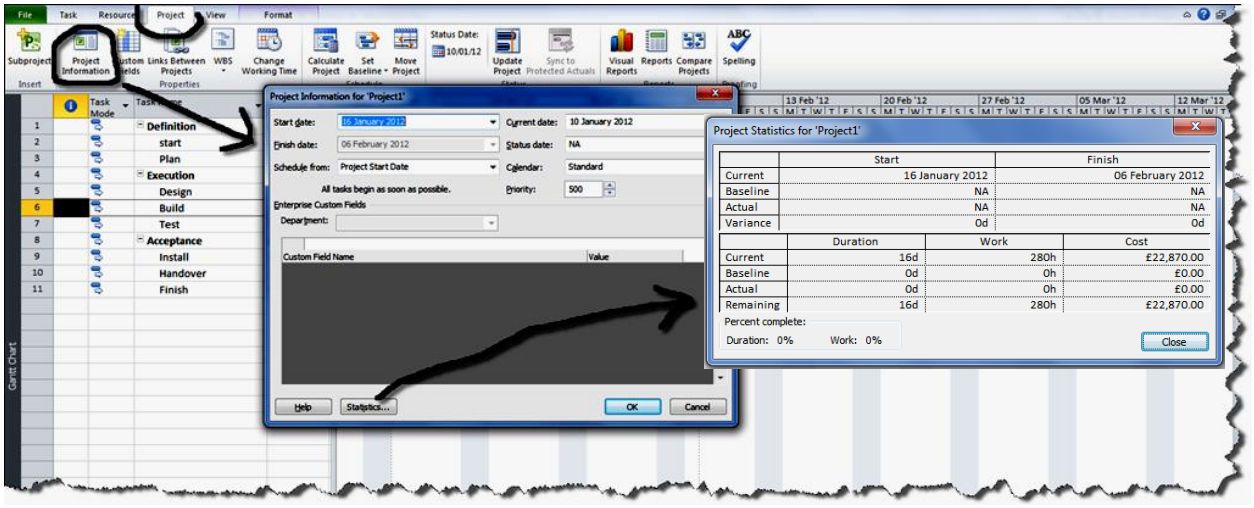


10. Perform resource leveling if needed to resolve resource over-allocations

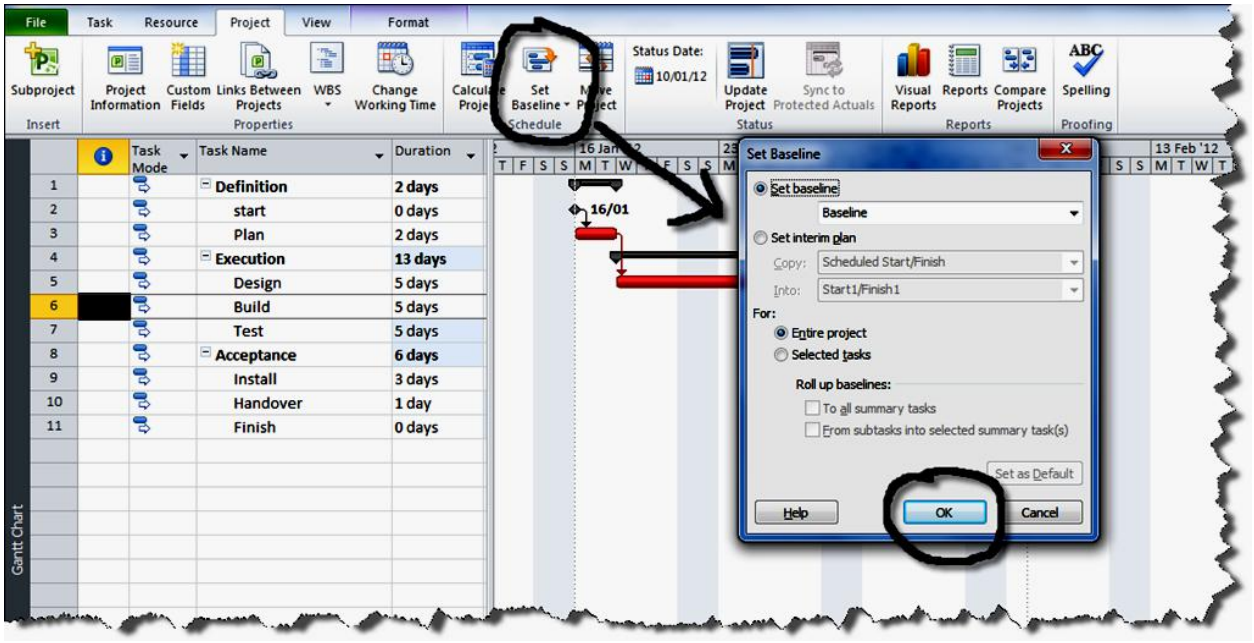


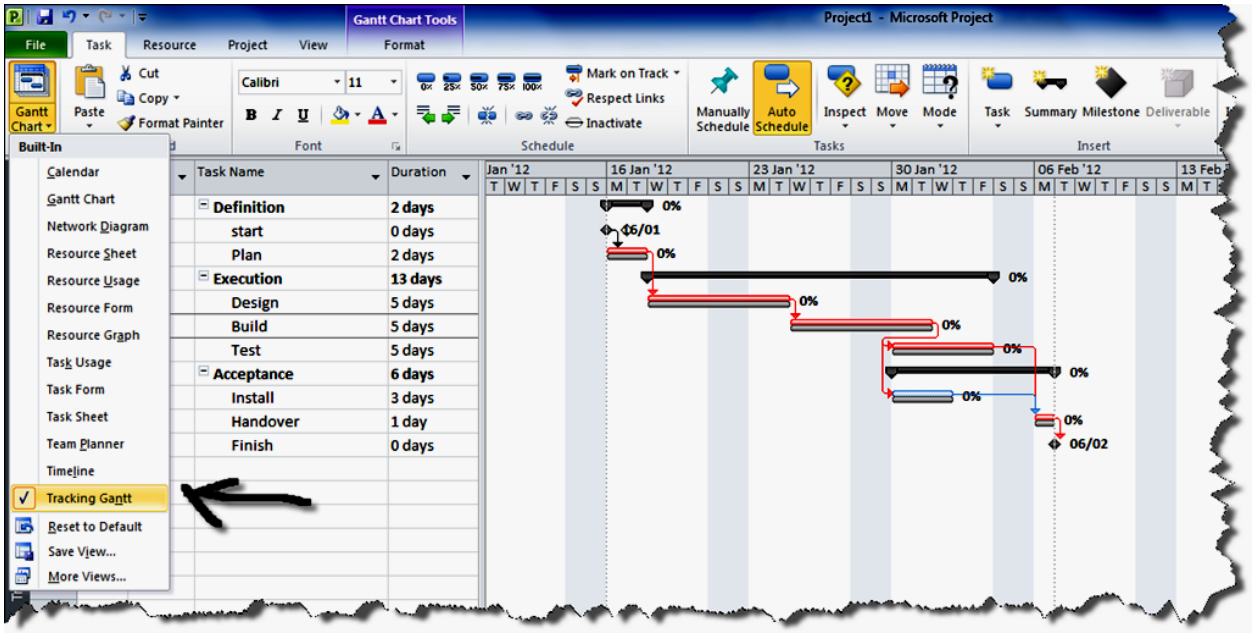
11. Review and refine the project schedule and budget to meet requirements

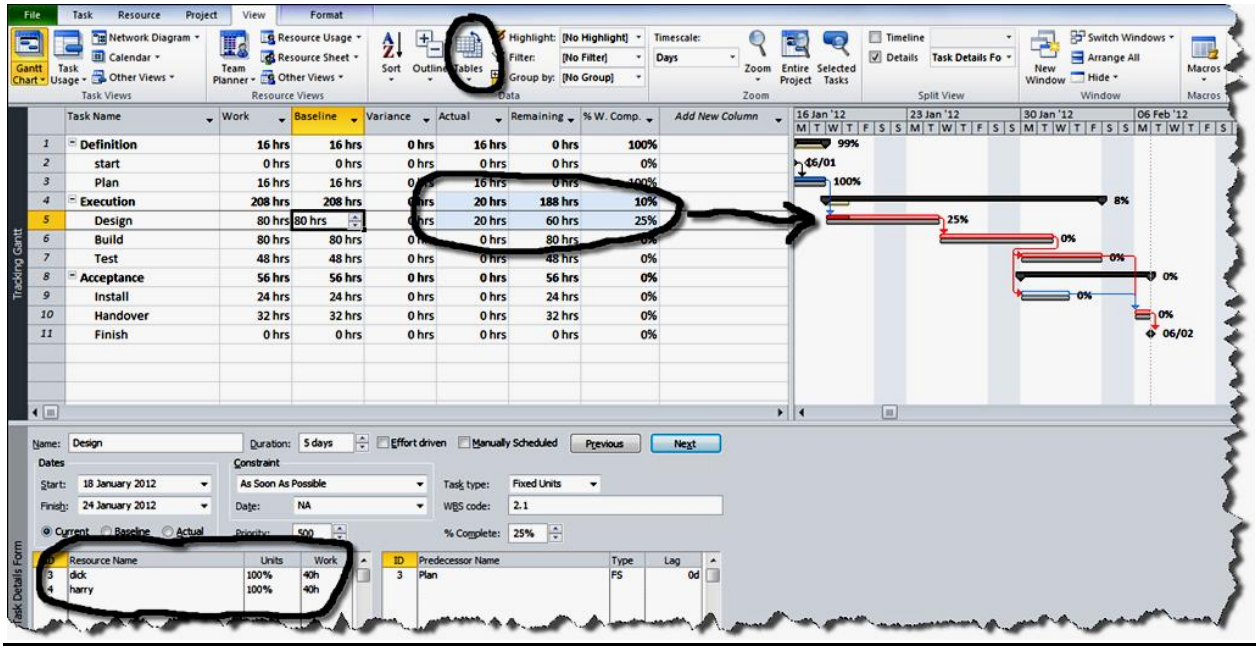




12. Set the project baseline after approval, and proceed to monitor, manage and report






File
Task
Resource
Project
View
Format
Gantt Chart
Task Usage
Network Diagram
Calendar
Other Views
Team Planner
Resource Usage
Resource Sheet
Other Views
Sort
Outline
Tables
Highlight: [No Highlight]
Filter: [No Filter]
Group by: [No Group]
Timescale:
Days
Zoom
Entire Project
Selected Tasks
Timeline
Details
Task Details Fo
New Window
Switch Windows
Arrange All
Hide
Macros
Task Views
Resource Views
Data
Zoom
Split View
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Task Name
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Baseline
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% W. Comp.
Add New Column
1 Definition 16 hrs 16 hrs 0 hrs 16 hrs 0 hrs 100%
2 start 0 hrs 0 hrs 0 hrs 0 hrs 0 hrs 0%
3 Plan 16 hrs 16 hrs 0 hrs 16 hrs 0 hrs 100%
4 Execution 208 hrs 208 hrs 0 hrs 20 hrs 188 hrs 10%
5 Design 80 hrs 80 hrs 0 hrs 20 hrs 60 hrs 25%
6 Build 80 hrs 80 hrs 0 hrs 0 hrs 80 hrs 0%
7 Test 48 hrs 48 hrs 0 hrs 0 hrs 48 hrs 0%
8 Acceptance 56 hrs 56 hrs 0 hrs 0 hrs 56 hrs 0%
9 Install 24 hrs 24 hrs 0 hrs 0 hrs 24 hrs 0%
10 Handover 32 hrs 32 hrs 0 hrs 0 hrs 32 hrs 0%
11 Finish 0 hrs 0 hrs 0 hrs 0 hrs 0 hrs 0%
16 Jan '12
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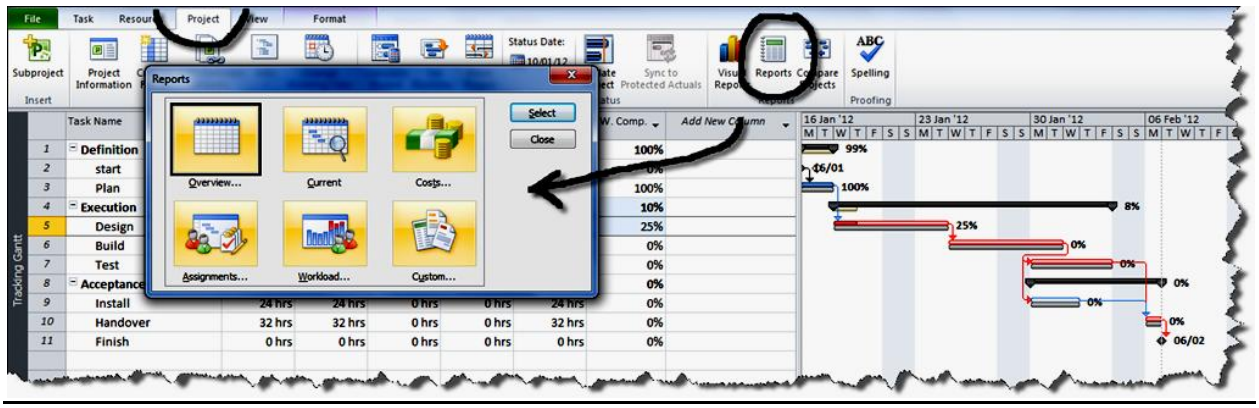
Task Details Form
Name: Design
Duration: 5 days
Effort driven
Manually Scheduled
Previous
Next
Dates
Start: 18 January 2012
Finish: 24 January 2012
Constraint
As Soon As Possible
Date: NA
Task type: Fixed Units
WBS code: 2.1
Current
Baseline
Actual
Priority: 500
% Complete: 25%
ID Resource Name Units Work
3 dick 100% 40h
4 harry 100% 40h
ID Predecessor Name Type Lag
3 Plan FS 0d


File
Task
Project
Format
Subproject
Project Information
Insert
Status Date:
Sync to Protected Actuals
Reports
Spelling
Proofing
Reports
Select
Close
Overview...
Current
Costs...
Assignments...
Workload...
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Task Name
Add New Column
1 Definition 100%
2 start 0%
3 Plan 100%
4 Execution 10%
5 Design 25%
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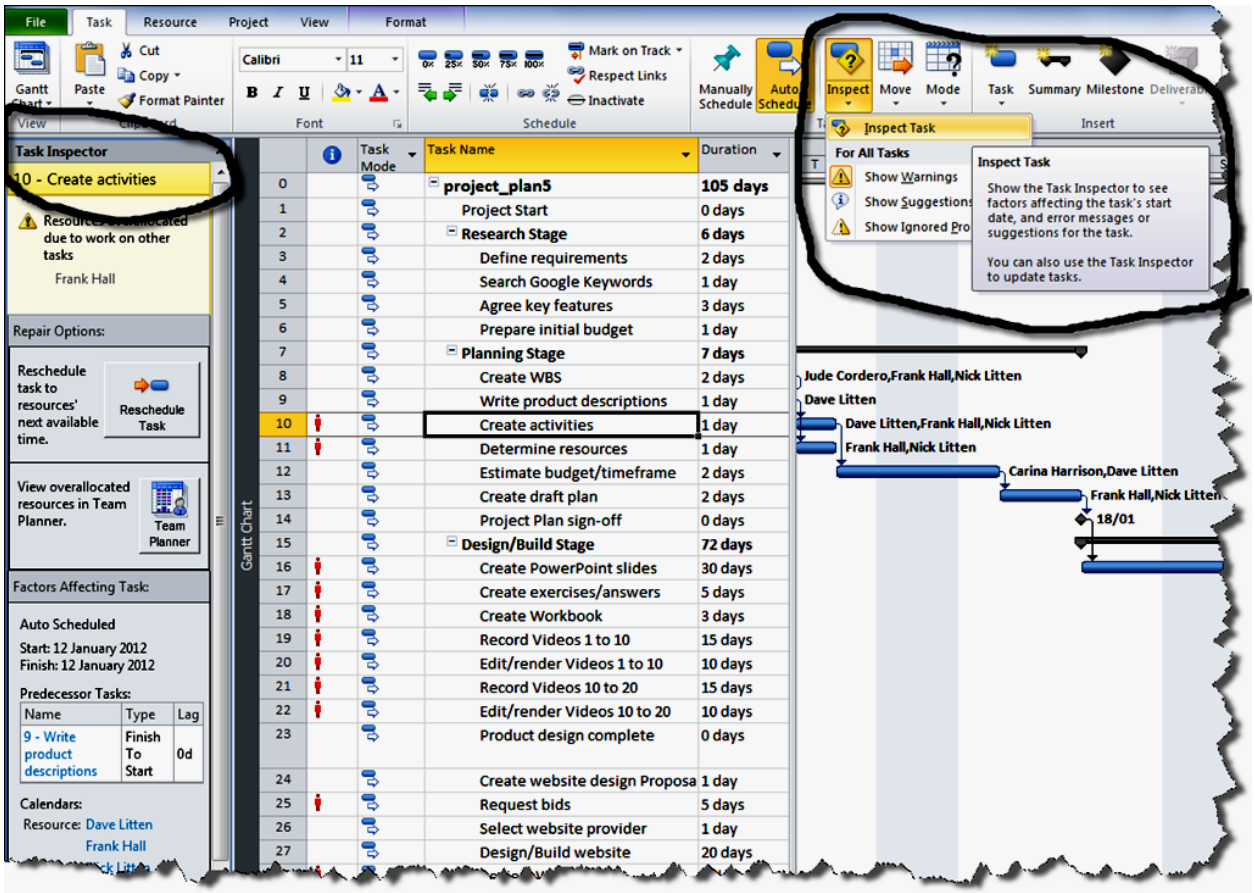
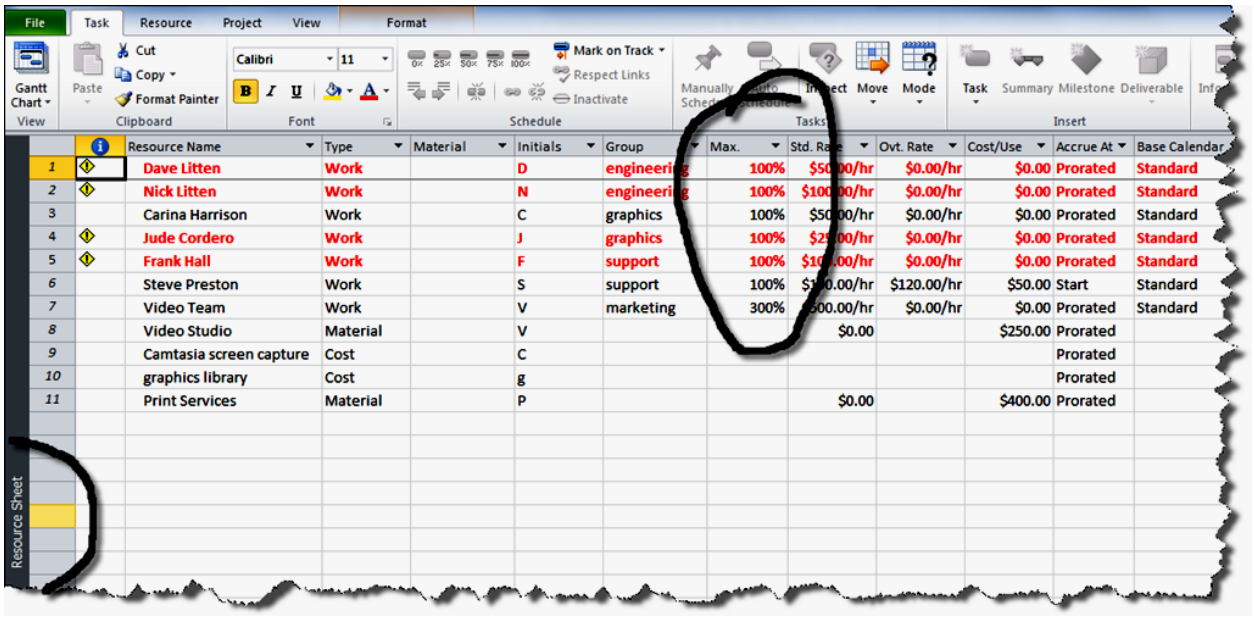
Ten Hot Tips To Resolve Resource Conflicts

When a resource is over-allocated, resolve resource conflicts by modifying resource assignments or changing scheduling in some way. Here are some ideas:

1. **Use the Task Inspector to identify sources and suggestions for resolving the over-allocation.**

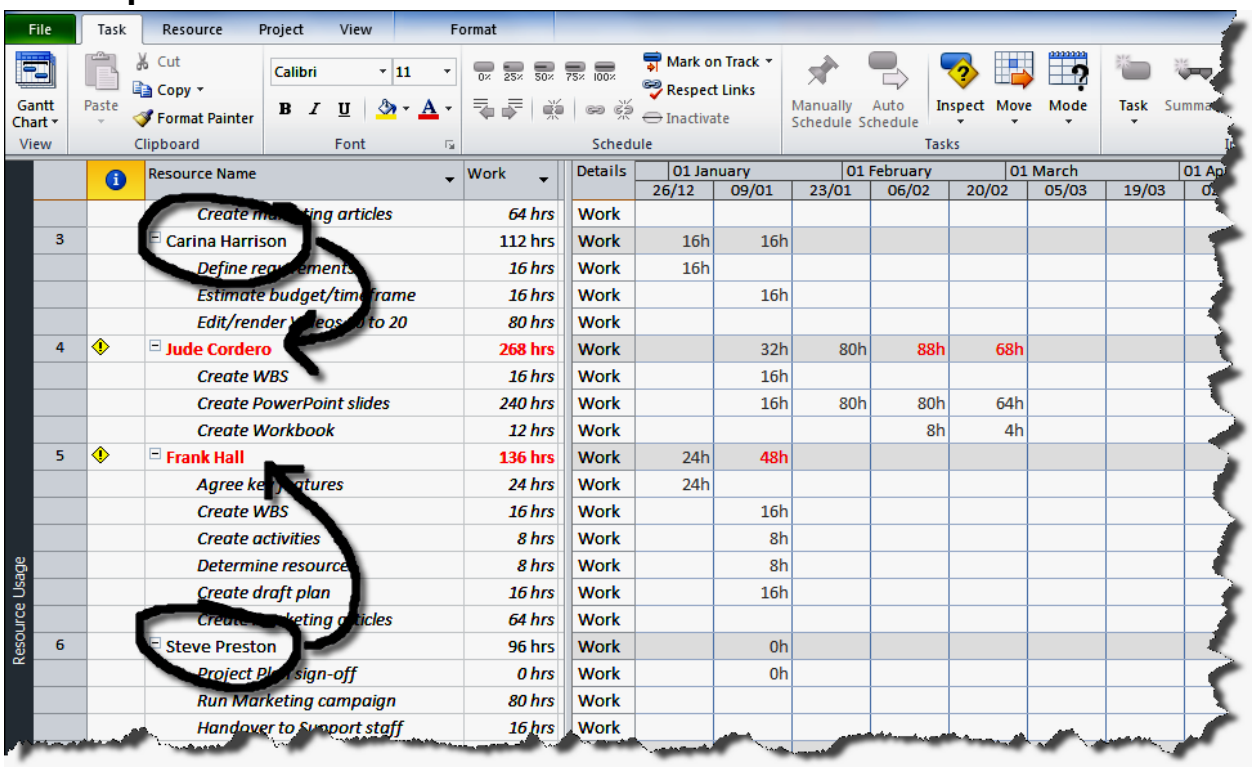


2. **Revise the resource's availability to the project (Resource Sheet view). Can the resource be made 100 percent available – or more?**



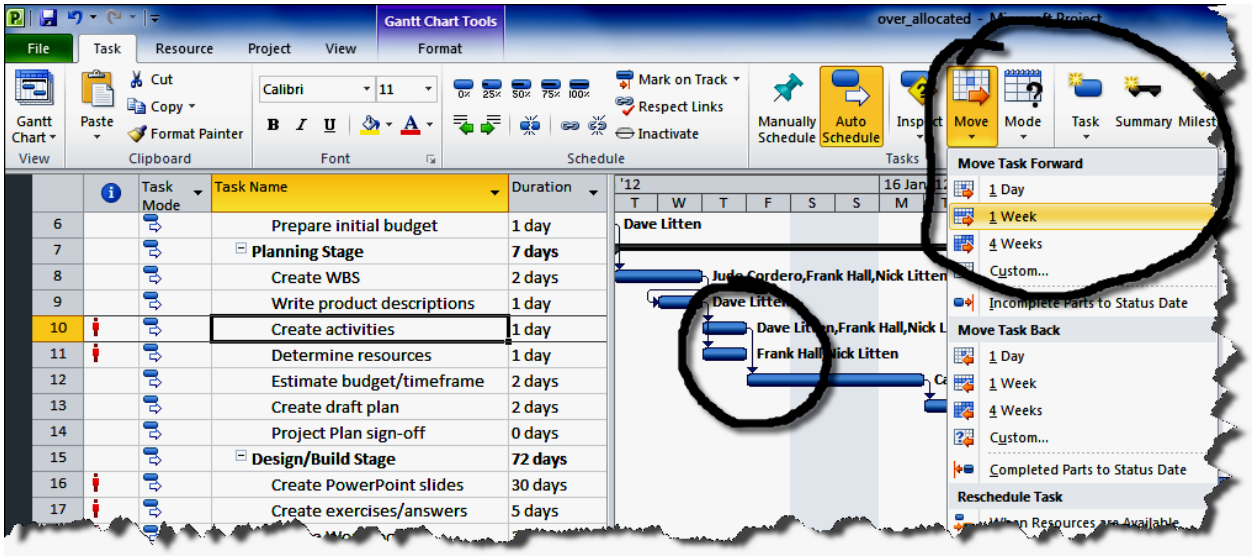
	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar
1	Dave Litten	Work		D	engineering	100%	$50.00/hr	$0.00/hr	$0.00	Prorated	Standard
2	Nick Litten	Work		N	engineering	100%	$100.00/hr	$0.00/hr	$0.00	Prorated	Standard
3	Carina Harrison	Work		C	graphics	100%	$50.00/hr	$0.00/hr	$0.00	Prorated	Standard
4	Jude Cordero	Work		J	graphics	100%	$25.00/hr	$0.00/hr	$0.00	Prorated	Standard
5	Frank Hall	Work		F	support	100%	$100.00/hr	$0.00/hr	$0.00	Prorated	Standard
6	Steve Preston	Work		S	support	100%	$100.00/hr	$120.00/hr	$50.00	Start	Standard
7	Video Team	Work		V	marketing	300%	$500.00/hr	$0.00/hr	$0.00	Prorated	Standard
8	Video Studio	Material		V			$0.00		$250.00	Prorated	
9	Camtasia screen capture	Cost		C						Prorated	
10	graphics library	Cost		g						Prorated	
11	Print Services	Material		P			$0.00		$400.00	Prorated	

3. **Can the resource assignment be replaced on those tasks that are in conflict and over-allocated? The Team Planner view or one of the Usage views are most helpful here.**

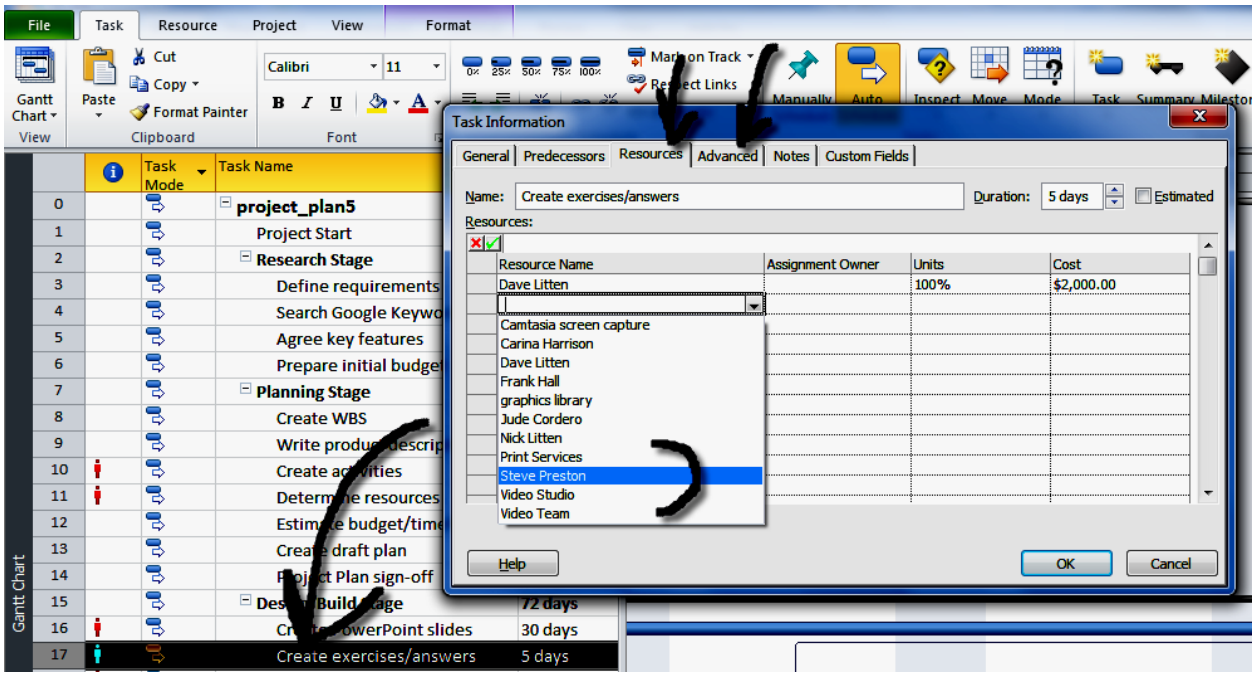


	Resource Name	Work	Details	01 January 26/12	09/01	01 February 23/01	06/02	01 March 20/02	05/03	19/03
	Create marketing articles	64 hrs	Work							
3	Carina Harrison	112 hrs	Work	16h	16h					
	Define requirements	16 hrs	Work	16h						
	Estimate budget/timeframe	16 hrs	Work		16h					
	Edit/render videos 1 to 20	80 hrs	Work							
4	Jude Cordero	268 hrs	Work		32h	80h	88h	68h		
	Create WBS	16 hrs	Work		16h					
	Create PowerPoint slides	240 hrs	Work		16h	80h	80h	64h		
	Create Workbook	12 hrs	Work				8h	4h		
5	Frank Hall	136 hrs	Work	24h	48h					
	Agree key features	24 hrs	Work	24h						
	Create WBS	16 hrs	Work		16h					
	Create activities	8 hrs	Work		8h					
	Determine resources	8 hrs	Work		8h					
	Create draft plan	16 hrs	Work		16h					
	Create marketing articles	64 hrs	Work							
6	Steve Preston	96 hrs	Work		0h					
	Project Plan sign-off	0 hrs	Work		0h					
	Run Marketing campaign	80 hrs	Work							
	Handover to Support staff	16 hrs	Work							

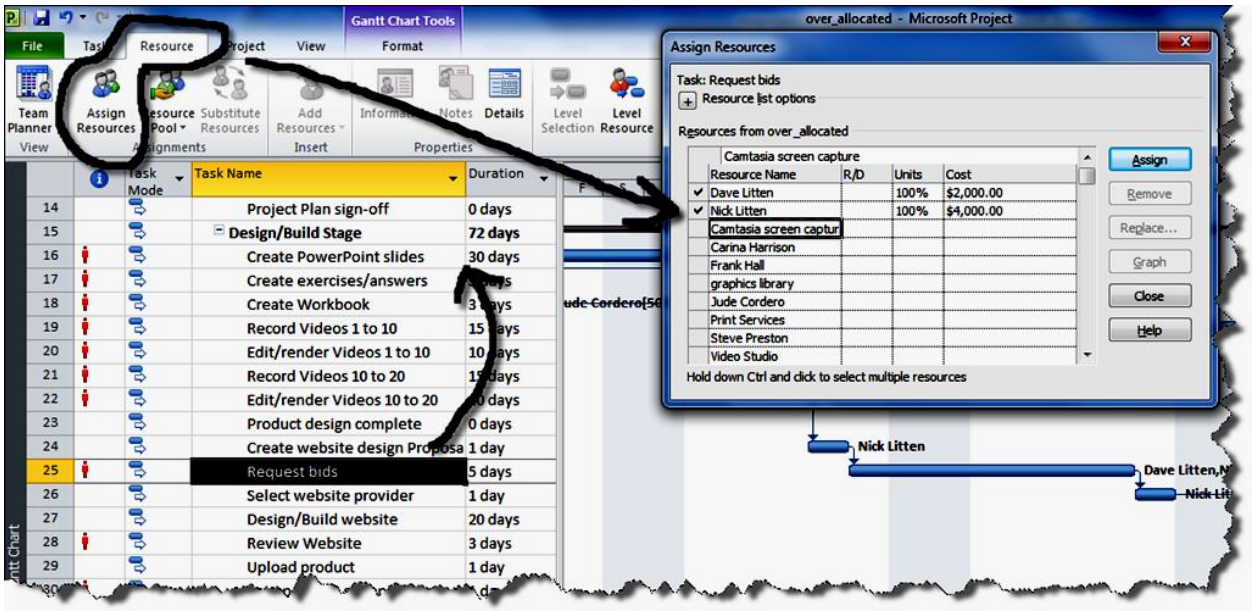
4. **Move a task to which the resource is assigned to a later date using the Move Task tool or modify the task's dependency relationships such that the task is in a different part of the timeframe.**



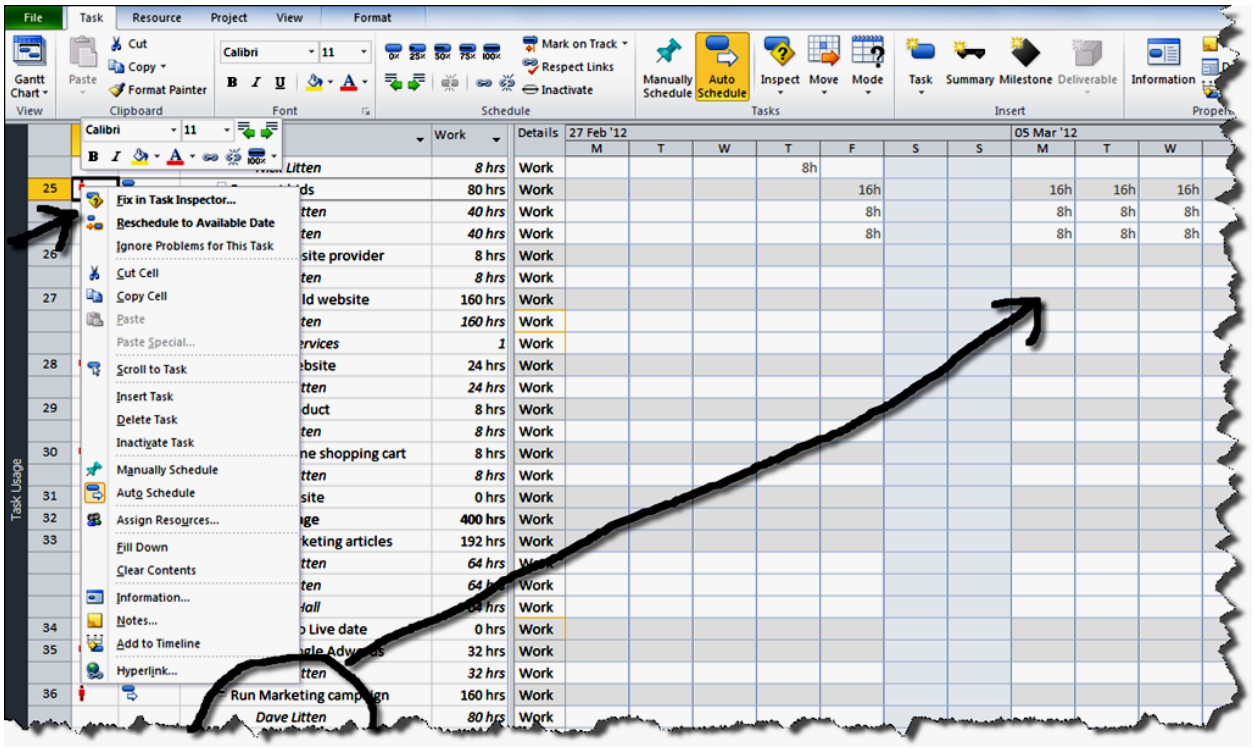
5. **For tasks with over-allocated resources, add a second (or more) resource to share the work. Double click the task name. Make sure the task is set to effort-driven.(advanced tab)**



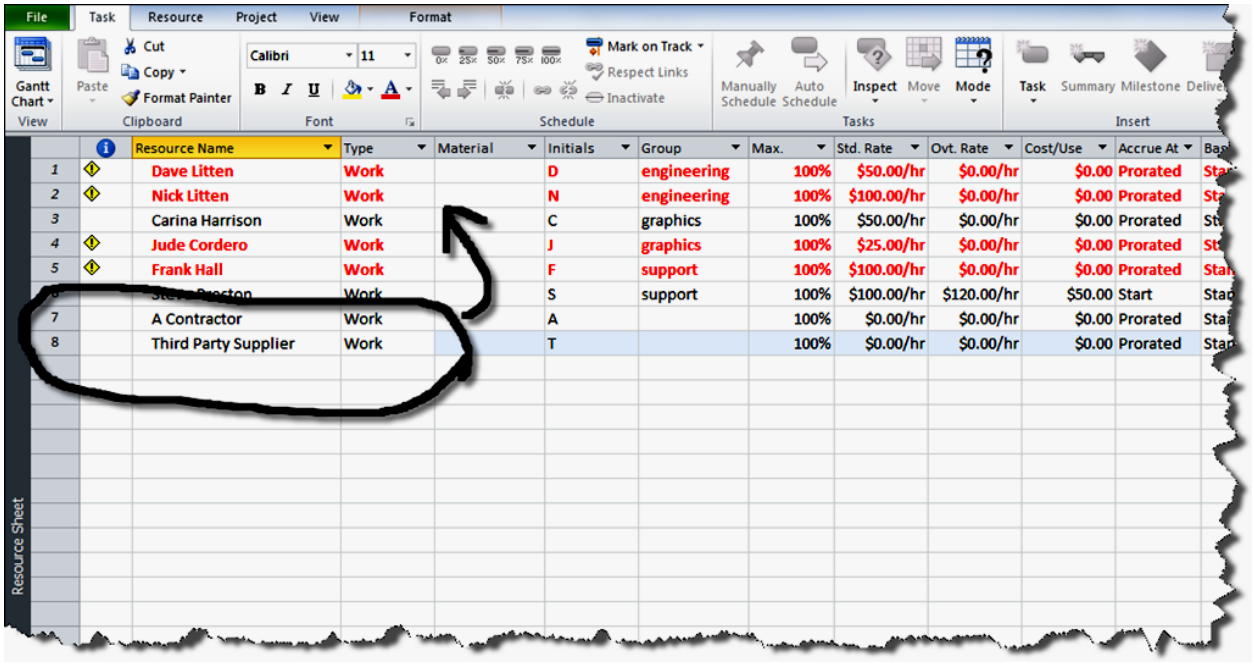
6. **Can an earlier task be assigned more resources to reduce its duration and free up a resource earlier that is assigned to an over-allocated task, so that the over-allocated task occurs in a different part of the timeframe.**



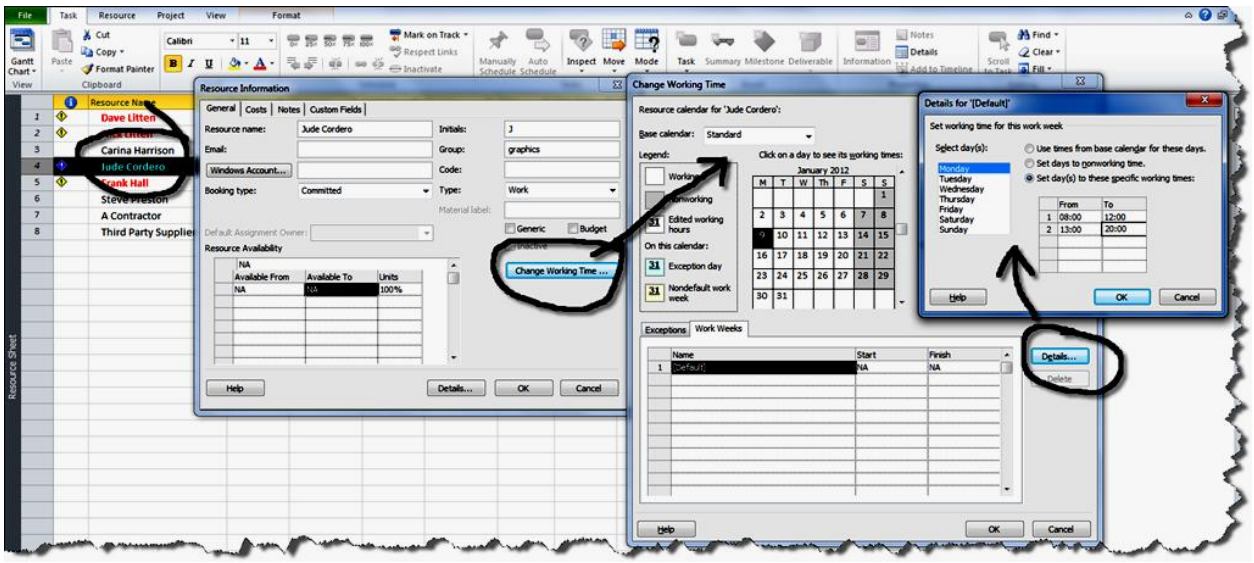
7. **Replace the resource with another on over-allocated tasks or move the task to a date where the resource IS available. Use a Usage view to spot any resources that are available**



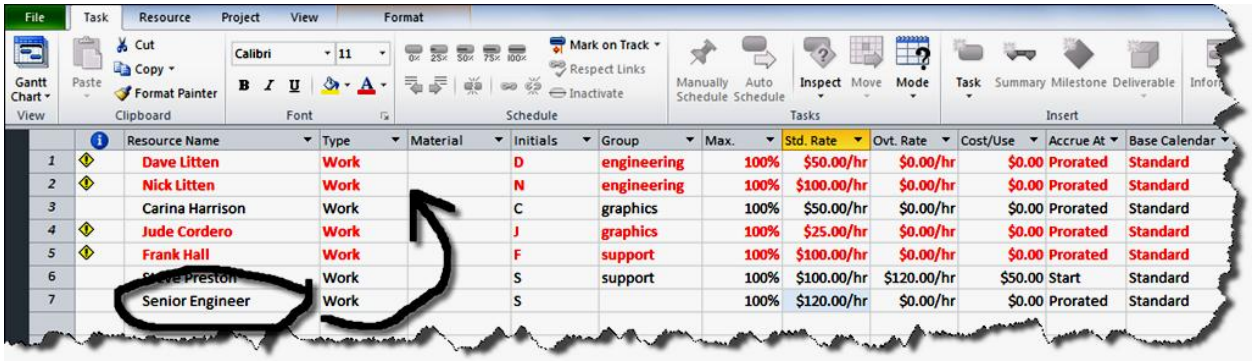
8. **Can a temporary or contract resource be added or procured to the resource pool to replace or share the over-allocated work?**



9. **Make changes to the resource base calendar to allow the resource to work more time in a week.**



10. Consider the knowledge, skills and experience of resources to reduce work effort time and potentially resolve over-allocations.

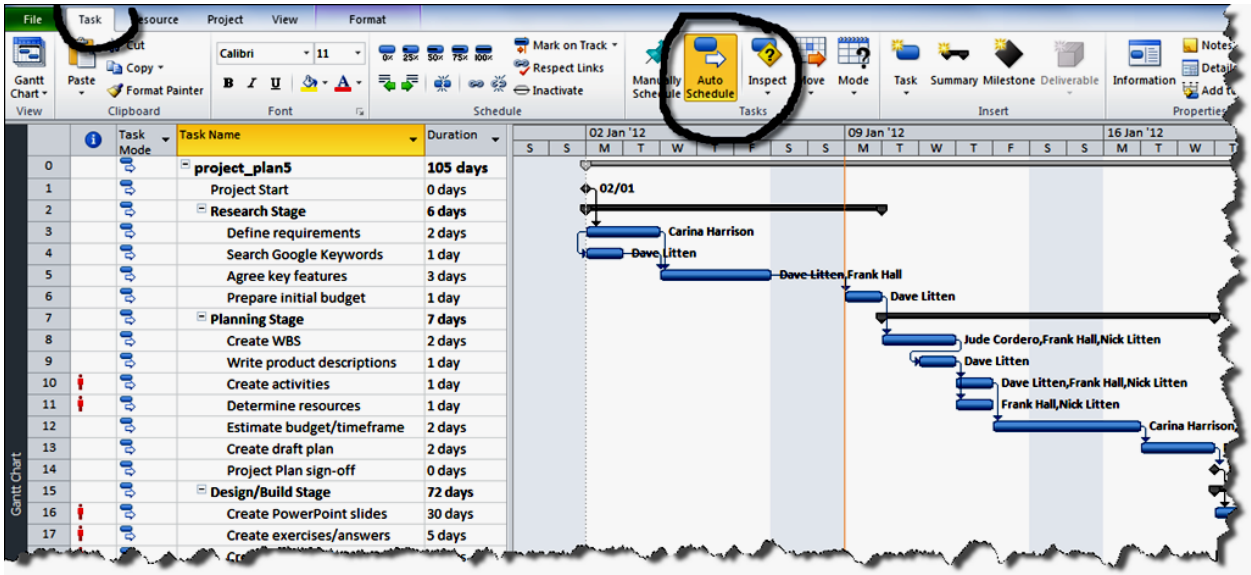


	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar
1	Dave Litten	Work		D	engineering	100%	$50.00/hr	$0.00/hr	$0.00	Prorated	Standard
2	Nick Litten	Work		N	engineering	100%	$100.00/hr	$0.00/hr	$0.00	Prorated	Standard
3	Carina Harrison	Work		C	graphics	100%	$50.00/hr	$0.00/hr	$0.00	Prorated	Standard
4	Jude Cordero	Work		J	graphics	100%	$25.00/hr	$0.00/hr	$0.00	Prorated	Standard
5	Frank Hall	Work		F	support	100%	$100.00/hr	$0.00/hr	$0.00	Prorated	Standard
6	[illegible] Preston	Work		S	support	100%	$100.00/hr	$120.00/hr	$50.00	Start	Standard
7	Senior Engineer	Work		S		100%	$120.00/hr	$0.00/hr	$0.00	Prorated	Standard

Ten Top Tips to Optimize and Crash the Project Schedule

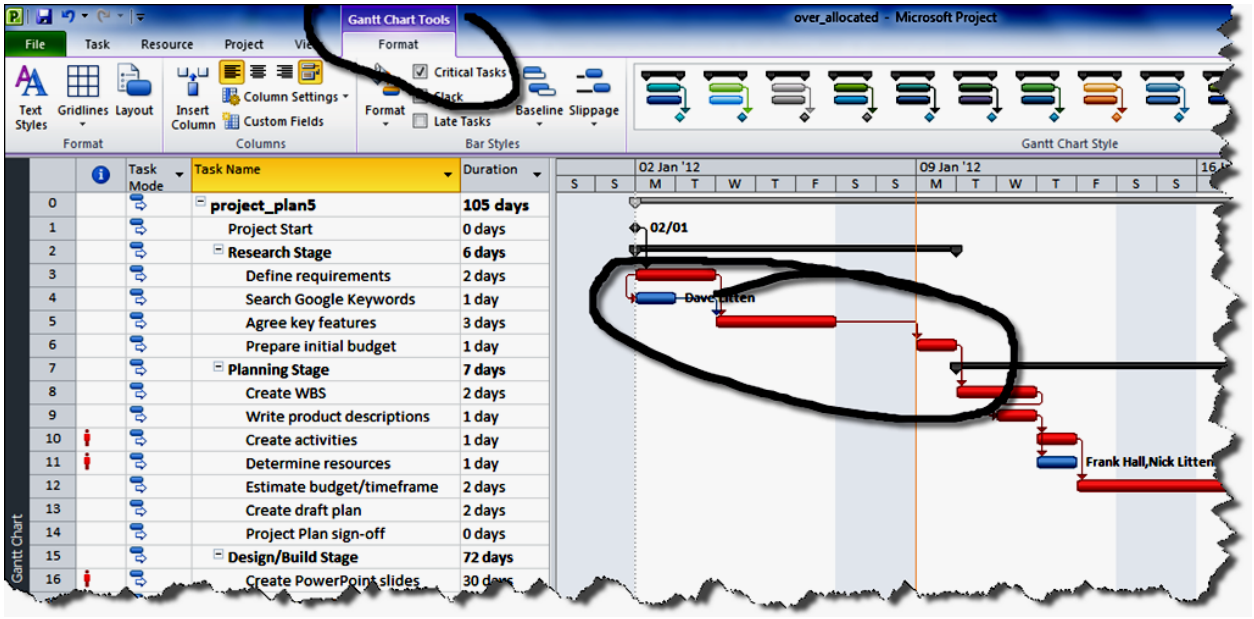
After creating your first draft schedule in Microsoft Project, it is almost certain that it will need to be refined in some way. Here are some ideas:

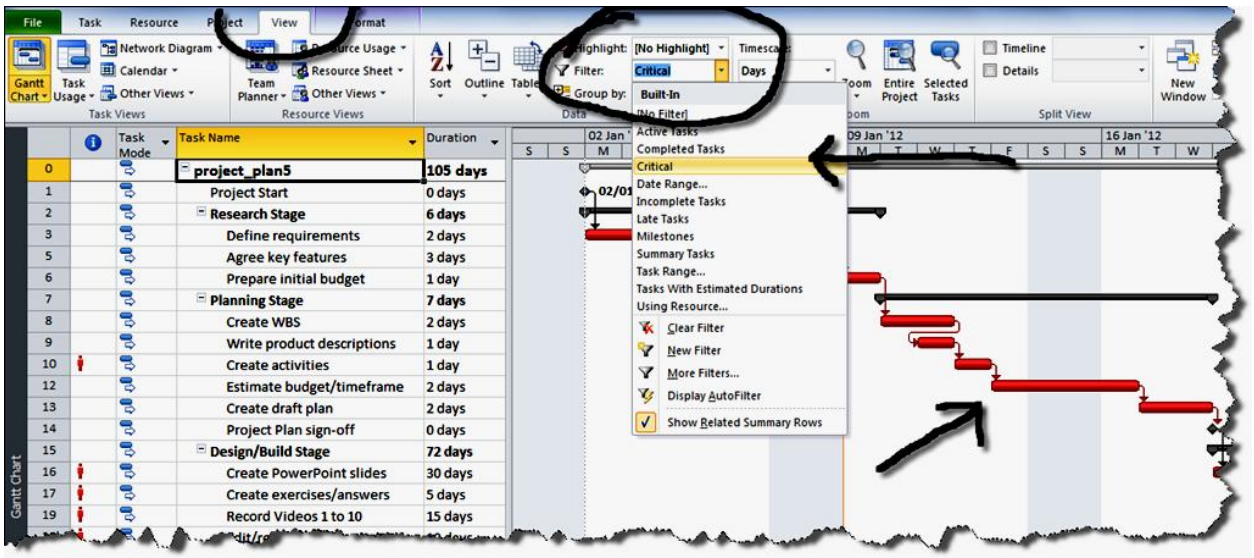
1. **Ensure that you have auto-schedule selected for your tasks as this will schedule them to start as soon as possible**



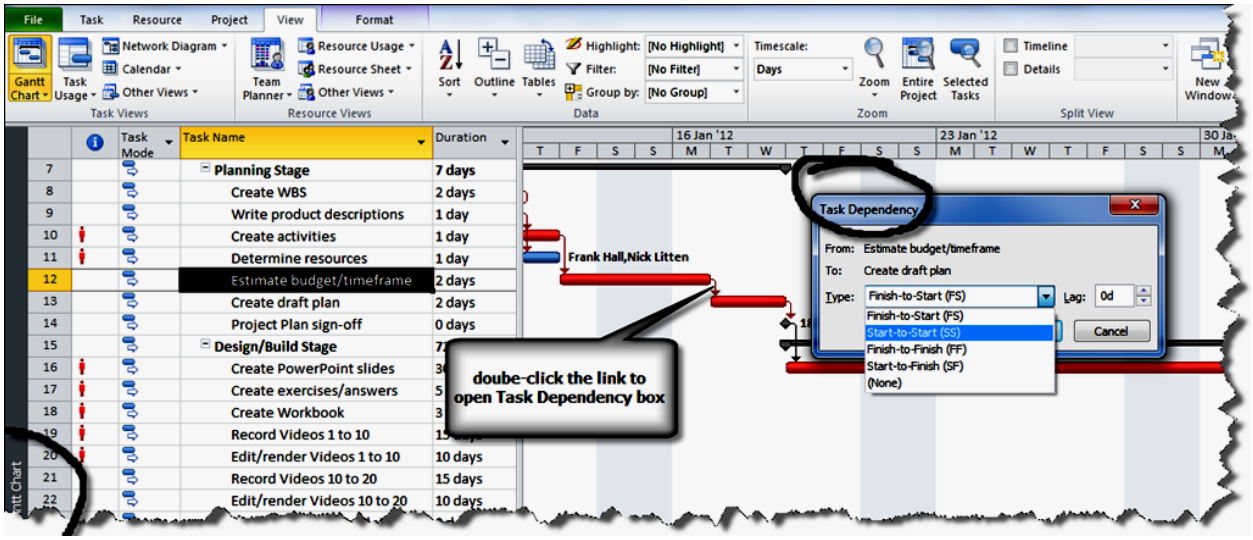
	Task Mode	Task Name	Duration
0		project_plan5	105 days
1		Project Start	0 days
2		Research Stage	6 days
3		Define requirements	2 days
4		Search Google Keywords	1 day
5		Agree key features	3 days
6		Prepare initial budget	1 day
7		Planning Stage	7 days
8		Create WBS	2 days
9		Write product descriptions	1 day
10		Create activities	1 day
11		Determine resources	1 day
12		Estimate budget/timeframe	2 days
13		Create draft plan	2 days
14		Project Plan sign-off	0 days
15		Design/Build Stage	72 days
16		Create PowerPoint slides	30 days
17		Create exercises/answers	5 days

2. **Use the critical path filter (or set critical tasks to red to do this 'by eye'), to focus on critical tasks only, since it is these alone that determine the project end date.**

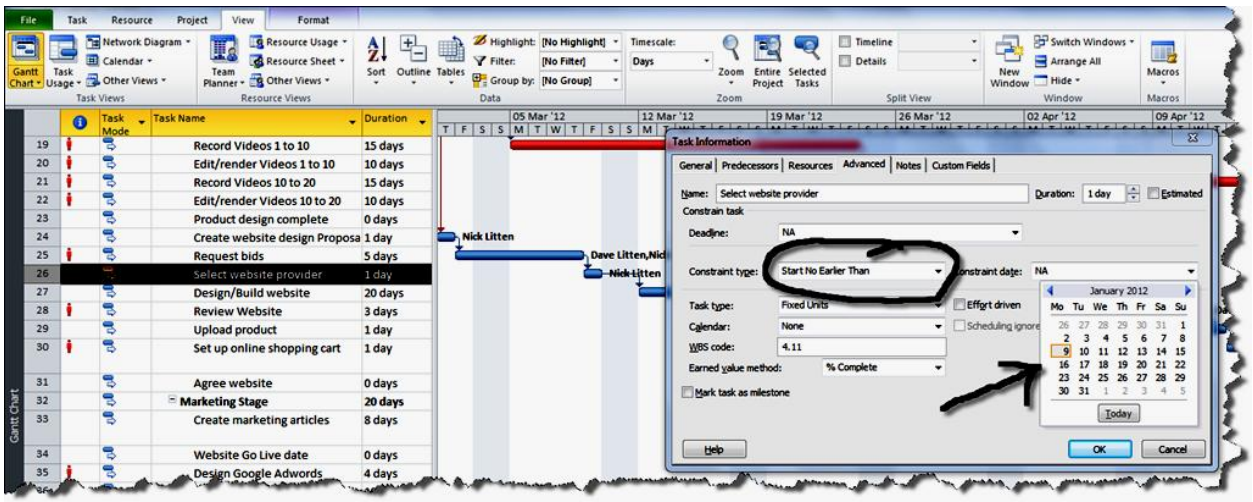




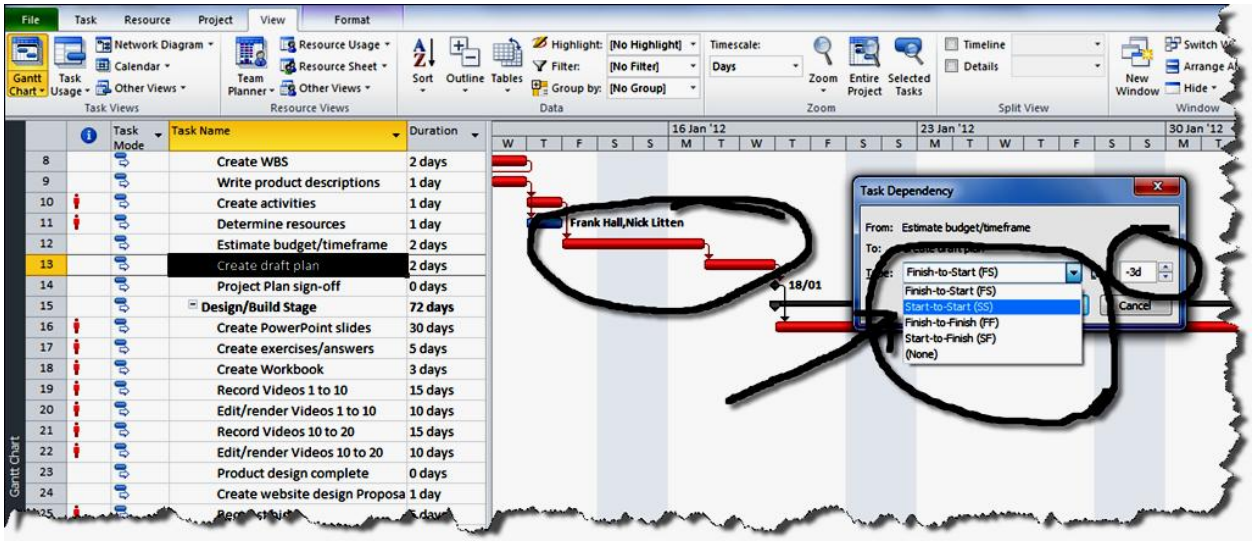
3. **Can any task dependencies that are currently finish-to-start be set to start-to-start relationships?**



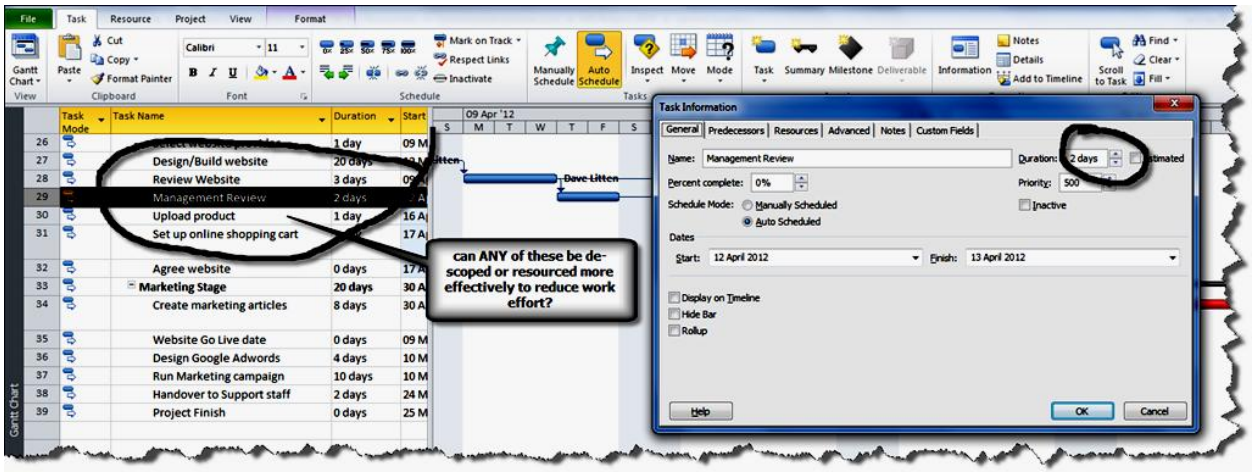
4. **Do you have any external dependencies? If so can they be set to occur earlier, or can they be set to act on tasks later/earlier in the schedule (even if they currently are not constraining any tasks, this is still a helpful approach).**



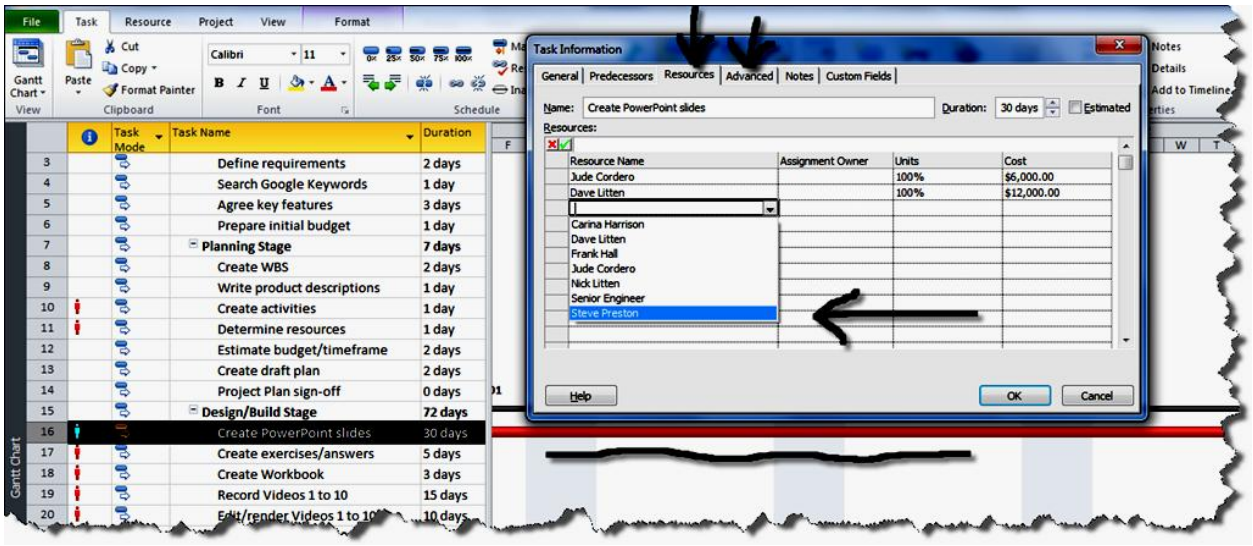
5. **Can any tasks use lead dependencies such that they overlap in time and hence finish earlier (this is always effective on critical tasks, but may also work on non-critical tasks)?**



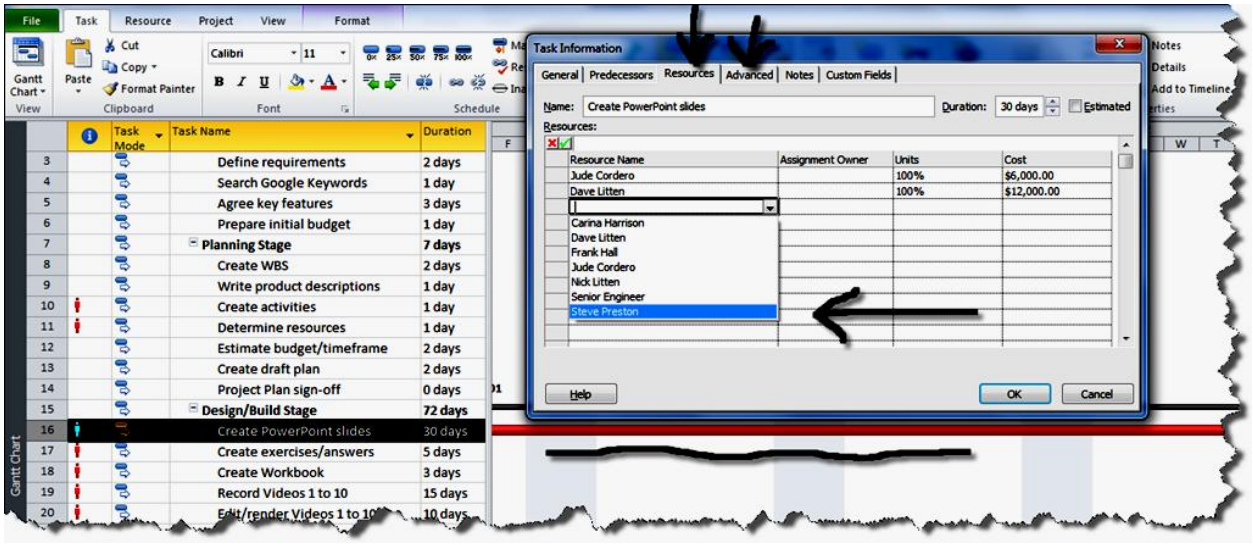
6. **Can the project be re-scoped such that either some tasks are not needed, or that some tasks require less work? In either case this may have shorten the project duration. Also re-check quality aspects such as acceptance testing, reviews, walkthroughs, audits, etc. Can these be carried out in a more efficient or effective manner that would shorten the project duration.**



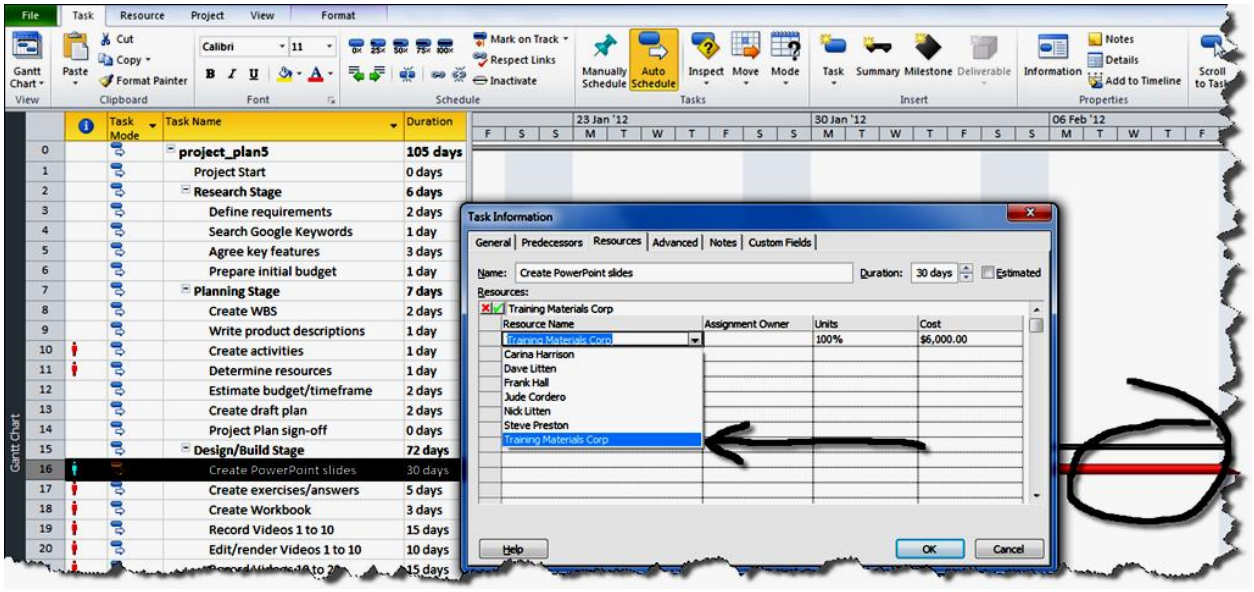
7. **Add resources to critical tasks (ensuring they are set to effort-driven), to shorten their duration and therefore finish time and hence bring in the project end date.**



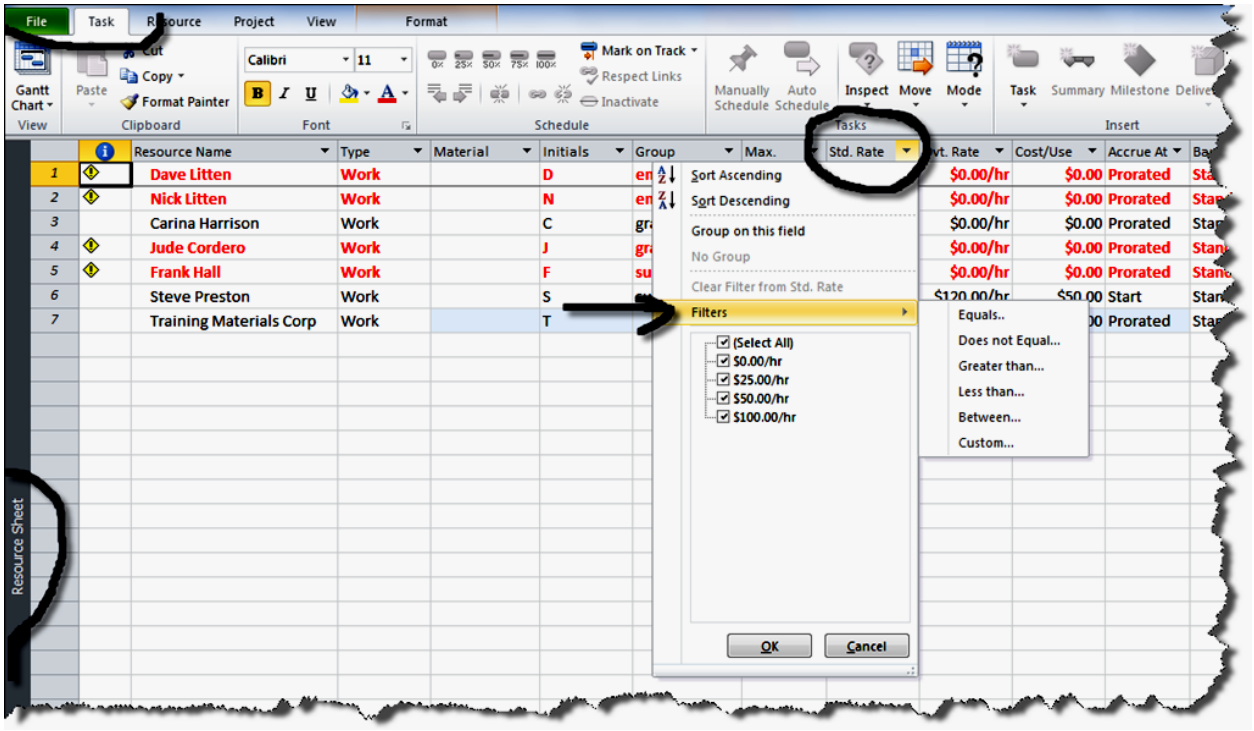
8. **Exchange human resources for those with higher levels of knowledge, skills or experience so that the work hours may be reduced and hence the task finish time. Focus on the critical tasks only.**

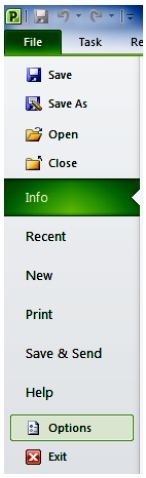


9. **Outsource certain tasks to a specialist individual or organization if they can get any critical path task(s) done quicker.**



10. **Costs. If the budget is a problem, first check all resources, human, materials, equipment, facilities, tools, even techniques, to see if they can be replaced with lower cost variants.**





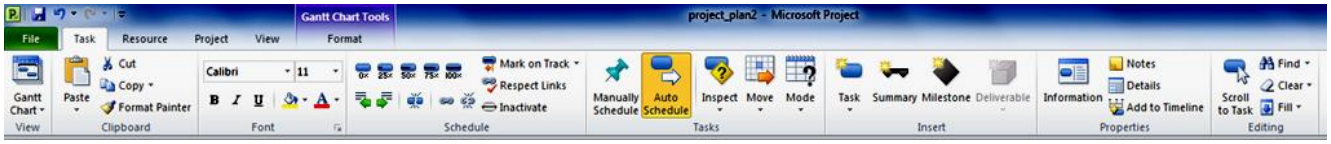
File Menu

Project Shortcuts

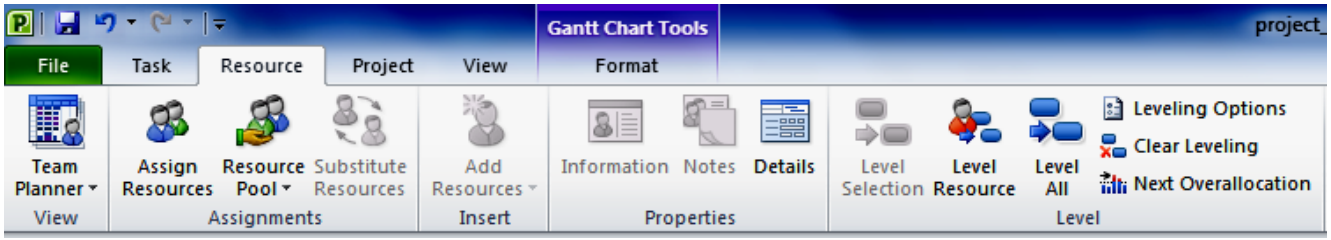
Keystroke	Result
Insert	Inserts new task
Ctrl+K	Inserts hyperlink
F7	Begins spell check
Alt+F10	Assigns resources
Shift+F2	Opens the Task Information dialog box
F1	Opens Microsoft Project Help
Ctrl+F	Displays the Find dialog box
Ctrl+F2	Links selected tasks

Keystroke	Result
Ctrl+G	Displays the Go To dialog box
Ctrl+H	Displays the Replace dialog box
Ctrl+Z	Undoes the previous action
Ctrl+Y	Redoes the undone action
Ctrl+P	Displays the Print preview in the Backstage
Ctrl+N	Opens a new blank Project
Ctrl+O	Opens the Open dialog box
Ctrl+S	Saves the file

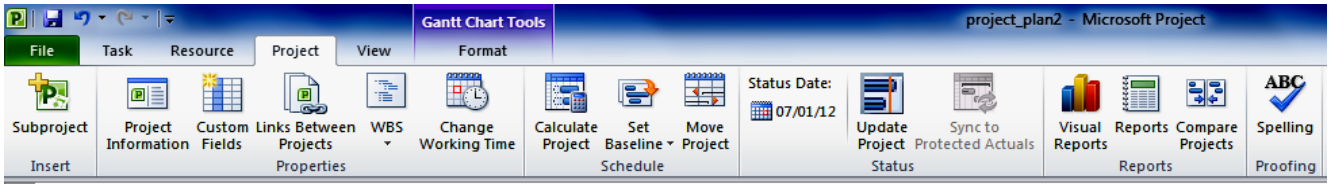
Task Menu



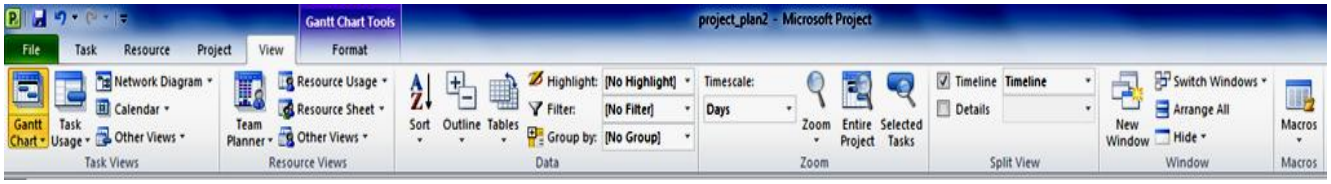
Resource Menu



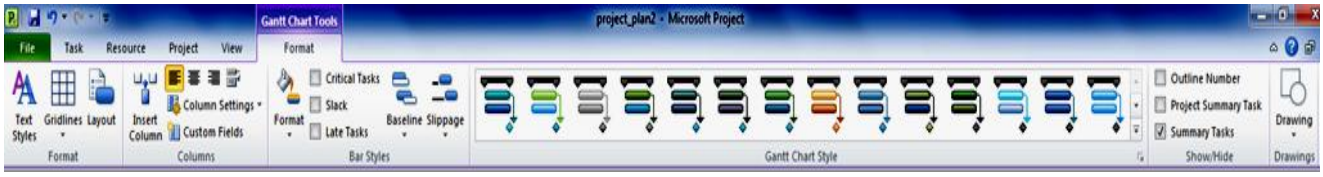
Project Menu



View Menu



Format Menu



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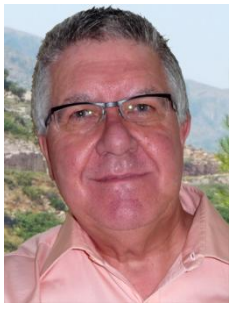
David Geoffrey Litten