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Project 2010 FOR DUMMIES®

by Nancy Muir

WILEY
John Wiley & Sons, Inc.

Project 2010 For Dummies®
Published by
John Wiley & Sons, Inc.
111 River Street
Hoboken, NJ 07030-5774

`www.wiley.com`

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Published by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

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Library of Congress Control Number: 2010925237

ISBN 978-0-470-50132-0 (pbk); ISBN 978-0-470-77043-6 (ebk); ISBN 978-0-470-87196-6 (ebk);
ISBN 978-0-470-87197-3 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2

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About the Author

Nancy Muir has written dozens of books on business and technology topics ranging from desktop applications, project management, and distance learning, to an award-winning book on character education for middle-schoolers and a textbook on computer science for community colleges. Prior to her freelance writing career, Nancy taught workshops in project management to Fortune 500 companies and was a manager in both the computer and publishing industries. She lives in the Pacific Northwest with her husband Earl, with whom she has collaborated on three books, including *Nanotechnology For Dummies.* She writes a column on computers and the Internet for retirenet.com, and has authored three books about computing for seniors: *Computers For Seniors For Dummies, Laptops For Seniors For Dummies,* and *Using the Internet Safely For Seniors For Dummies* (with co-author Linda Criddle).

Dedication

To my husband Earl who puts up with my work schedule and makes every minute away from work fabulous.

Author's Acknowledgments

First, many thanks to my friend Elaine Marmel, author of the *Microsoft Project Bible* from Wiley. Her advice and insight into the workings of Project always help me see the forest for the trees.

Second I thank the folks at Wiley, including Kyle Looper, my able acquisitions editor, and Blair Pottenger, the book's project editor who is always incredibly supportive and patient and helps me hold all the pieces together. Thanks also to copy editor John Edwards and technical editor Thuy Le for keeping my humble prose accurate and intelligible.

Publisher's Acknowledgments

We're proud of this book; please send us your comments at `http://dummies.custhelp.com`. For other comments, 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.

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Introduction

Project management probably started back when a few cave dwellers got together and figured out how to work as a team to bag a wooly mammoth for their Sunday dinner. Some fellow — I'll call him Ogg — probably took the lead as the very first project manager. He drew things in the dirt with a stick to help his team members understand the strategy of the hunt, and communicated with them in ughs and grunts. Unlike you, he had no boss to report to, no budget, and no deadlines (lucky Ogg), but the fundamental spirit of a project was there.

Over the years, project management has evolved as a discipline that involves sophisticated analyses and techniques, projections, tracking of time and money, and reporting. Project management software — which has been around only about 25 years or so — has brought a new face and functionality to project management that would have left our friend Ogg ughless.

About This Book

Microsoft Office Project 2010, the most recent incarnation of the world's most popular project management software, offers a tremendous wealth of functionality to users. However, it's probably not like any other software you've ever used, so mastering it can seem a daunting process. One trick is to understand how its features relate to what you do every day as a project manager. Another is to get someone like me to tell you all about its features and how to use them.

In *Microsoft Office Project 2010 For Dummies,* my goal is to help you explore all that Project offers, providing information on relevant project management concepts while also offering specific procedures to build and track your Project plans. But more importantly, I offer advice on how to make all these features and procedures mesh with what you already know as a project manager to make the transition easier.

Foolish Assumptions

I've made some assumptions about you, gentle reader. I figure that you are computer literate and know how to use a mouse, a keyboard, software menus, and toolbars. I assume that you know how to use most common

Windows functions (such as the Clipboard) as well as many basic software functions (such as selecting text and dragging and dropping things with your mouse).

I do not assume that you've used Project or any other project management software before. If you're new to Project, you'll find what you need to get up to speed, including information on how Project works, finding your way around Project's interface, and building your first Project plan. If you've used an earlier version of Project, you'll find out about Project 2010 and all the new features it provides.

Conventions Used in This Book

I should explain a few odds and ends to make using this book easier:

- Web site addresses, known as URLs, are shown in monofont, like this: `www.microsoft.com`.
- Ribbon commands are given in the order in which you select the tab and command (without the group), for example, "Choose Project⇨Project Information." (For more on Project's new Ribbon, see Chapter 2.)
- Options in dialog boxes use initial caps even if they aren't capitalized on your screen to make it easier to identify them in sentences. For example, what appears as `Show summary tasks` in the Options dialog box will appear as Show Summary Tasks in this book.

How This Book Is Organized

This book is designed to help you begin to use Microsoft Office Project 2010 to plan, build, and track progress on projects, keeping in mind tried-and-true project management practices and principles. I divided the book into logical parts that follow the process of building and tracking a typical project plan.

Part I: Setting the Stage for Project

Part I explains what Project 2010 can do for you as well as what types of input you have to provide to use it successfully on your projects. You'll get your first glimpse of Project views and discover how to navigate around them. You'll begin to build Project plans by making calendar settings, building a task outline, and then entering timing and timing relationships for those tasks.

Part II: People Who Need People

Part II is the Project resources section: You discover all you need to know about creating and assigning work resources, material resources, and fixed costs to tasks in a project. You also discover how using resources on your project relates to the costs you accrue over time.

Part III: Well, It Looks Good on Paper . . .

Up to now, you've been mapping out your project plan. Now it's time to see whether that plan meets your needs in terms of budget and timing. Project offers a whole toolbox to help you modify resource assignments and task timing to trim your costs and meet your deadlines so that you can finalize your plan. You also get briefed on how to modify the format of items in your project to make your plan look as polished as possible, both on-screen and in print.

Part IV: Avoiding Disaster: Staying on Track

As any experienced project manager knows, projects just about never happen the way you thought they would. In this part, you save a picture of your plan — a *baseline* — and then begin to track actual activity against your plan. You also take a look at methods of reporting your progress, and how to get back on track when you find yourself derailed. In the final chapter, I provide advice on how to use what you glean from your projects to make better planning choices going forward.

Part V: Working with Enterprise Projects

With all that Project Professional has to offer the enterprise via its Project Server and Project Web App (also called Project Web Application; formerly called Project Web Access) functionalities and SharePoint online services, you can share documents online with your project team, have team members report their work time, and even integrate Project information with Outlook. This part shows you the basics of what Project Server can do, and how to use Project Web App from both the managers' and users' perspective.

Part VI: The Part of Tens

Ten seems to be a handy number of items for humans to put into lists, so this part gives you two such lists: Ten Golden Rules of Project Management and Ten Project Management Software Products to Explore. The first of these chapters tells you about some dos and don'ts that can save you a lot of grief when you're using Project for the first time (or the fifth time, for that matter). The second offers a look at some add-on products and complementary software products that bring even more functionality to Microsoft Office Project.

What You're Not to Read

First, you don't have to read this book from front to back unless you really want to. If you want to just get information about a certain topic, you can open this book to any chapter and get the information you need.

That said, I have structured the book to move from some basic concepts that equip you to understand how Project works through the steps involved in building a typical project. If you have an overpowering need to find out the whole shebang, you can start at the beginning and work your way through the book to build your first Project plan.

Icons Used in This Book

One picture is worth . . . well, you know. That's why *For Dummies* books use icons to give you a visual clue as to what's going on. Essentially, icons call your attention to bits of special information that may very well make your life easier. Following are the icons used in this book.

REMEMBER

Remember icons signal either a pertinent fact that relates to what you're reading at the time (but is also mentioned elsewhere in the book) or a reiteration of a particularly important piece of information that's, well, worth repeating.

TIP

Tips are the advice columns of computer books: They offer sage advice, a bit more information about a topic under discussion that may be of interest, or ways to do things a bit more efficiently.

Warning icons spell trouble with a capital *T:* When you see a warning, read it. If you're not careful, you might do something at this point that could cause disaster.

Where to Go from Here

It's time to take what you've learned in the project management school of hard knocks and jump into the world of Microsoft Office Project 2010. When you do, you'll be rewarded with a wealth of tools and information that help you to manage your projects much more efficiently.

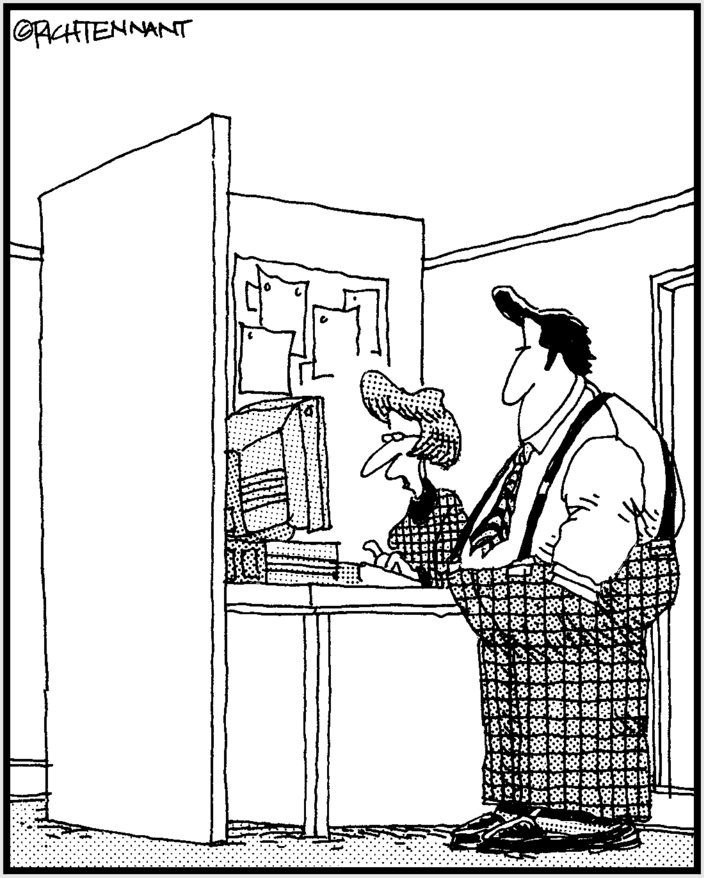
Here's where you step out of the world of cave-dweller project management and into the brave, new world of Microsoft Office Project 2010.

This book is accompanied by a companion Web site filled with project management goodies, including links to project management add-on software and some example Microsoft Project files that you can experiment with. To access this book's Web site, point your Web browser to `www.dummies.com/go/project2010`.

Part I

Setting the Stage for Project

The 5th Wave By Rich Tennant



"Look you've got Project Manager, Acct. Manager, and Opportunity Manager, but Sucking Up to the Manager just isn't a field the program comes with."

In this part . . .

Part I explains the types of input you have to give Project to make the best use of its capabilities. You get a briefing on using Project views, using calendar and scheduling settings to build Project plans, creating task outlines, and then specifying the timing and relationships that organize your project's tasks.

Chapter 1

Project Management: What It Is, and Why You Should Care

In This Chapter

- Discovering how traditional project management makes the move to software
- Understanding what elements of a project are managed in Project
- Understanding the project manager's role
- Exploring the role of the Internet in project management
- Using a template to start a new project
- Saving a project file
- Finding help in Project

Welcome to the world of computerized project management with Microsoft Project. If you've never used project management software, you're entering a brave, new world. It's like walking from the office of 25 years ago — with no fax, voicemail, or e-mail — into the office of today with its wealth of high-tech devices.

Everything you used to do with handwritten to-do lists, word processors, and spreadsheets all magically comes together in Project. However, this transition won't come in a moment, and you need a basic understanding of what project management software can do to get you up to speed. If you've used previous versions of Project, this little overview can help you refresh your memory as well as ease you into a few of the new features of Project 2010.

So, even if you're a seasoned project manager, take a minute to review this chapter. It provides the foundation for how you'll work with Project from here on.

The ABCs of Project Management

You probably handle projects day in and day out. Some are obvious, because your boss named them so that any fool would know that they're projects: the Acme Drilling Project or the Network Expansion IT Project, for example. Others are less obvious, such as that speech thing you have to do on Saturday for your professional association or washing the dog.

If you need to organize a company holiday party, it's a project. If you were handed a three-year Earth-exploration initiative to find oil in Iowa, coordinate subcontractors and government permits, and work with a team of 300 people, that's definitely a project. Yes, even that speech you have to present is a project because it has certain characteristics.

Understanding what your projects, large or small, have in common is the basis of understanding what Project can do for you. All projects have

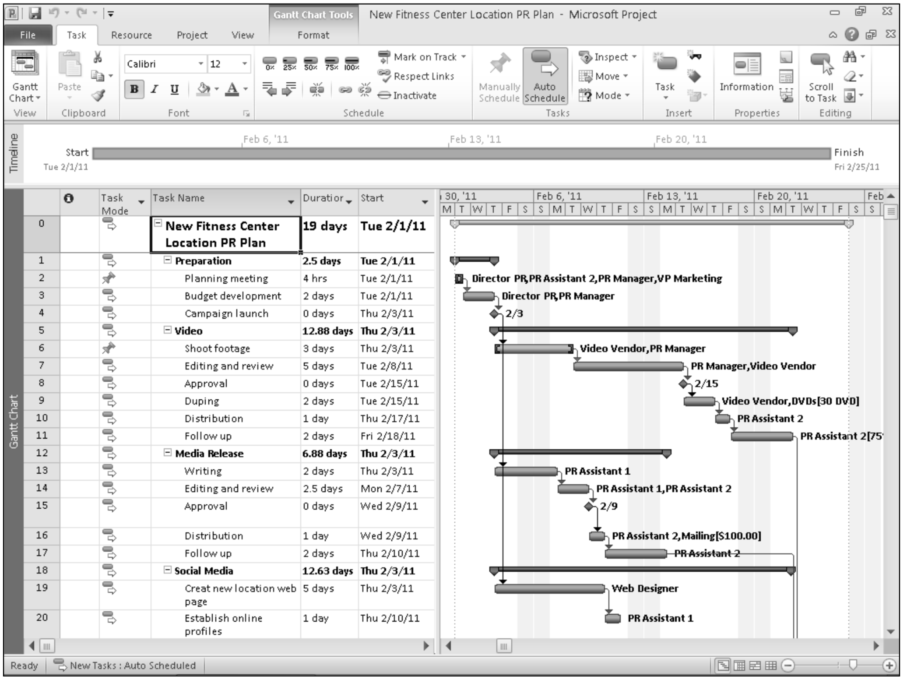
- An overall goal and unique deliverables
- A project manager
- Individual tasks to be performed between a specific starting point and ending point
- Timing for those tasks to be completed (such as three hours, three days, or three months)
- Timing relationships between those tasks (for example, you can't put a new manufacturing process in place until you train people in how to use the process)
- *Resources* (people, equipment, facilities, and supplies, for example) to accomplish the work
- A *budget* (the costs associated with those people, equipment, facilities, and supplies)

Project management is simply the process of managing all the elements of a project, whether that project is large or small.

The three Ts: Tasks, timing, and dependencies (well, two Ts and a D)

As Lewis Carroll said, "If you don't know where you're going, any road will get you there." So, first things first: You have to understand the goal of your project so that you can begin to build the tasks that have to be performed to get you there.

A *task* is simply one of those items you used to scribble on your handwritten to-do lists, such as *Write final report* or *Apply for permits.* Tasks are typically organized into *phases* (appropriate stages) in Project, arranged in an outline-like structure, as you can see in the project shown in Figure 1-1. Because timing is essential in any project, Project helps you set up and view the timing relationships among tasks.



	Task Mode	Task Name	Duration	Start
0		**New Fitness Center Location PR Plan**	**19 days**	**Tue 2/1/11**
1		**Preparation**	**2.5 days**	**Tue 2/1/11**
2		Planning meeting	4 hrs	Tue 2/1/11
3		Budget development	2 days	Tue 2/1/11
4		Campaign launch	0 days	Thu 2/3/11
5		**Video**	**12.88 days**	**Thu 2/3/11**
6		Shoot footage	3 days	Thu 2/3/11
7		Editing and review	5 days	Tue 2/8/11
8		Approval	0 days	Tue 2/15/11
9		Duping	2 days	Tue 2/15/11
10		Distribution	1 day	Thu 2/17/11
11		Follow up	2 days	Fri 2/18/11
12		**Media Release**	**6.88 days**	**Thu 2/3/11**
13		Writing	2 days	Thu 2/3/11
14		Editing and review	2.5 days	Mon 2/7/11
15		Approval	0 days	Wed 2/9/11
16		Distribution	1 day	Wed 2/9/11
17		Follow up	2 days	Thu 2/10/11
18		**Social Media**	**12.63 days**	**Thu 2/3/11**
19		Creat new location web page	5 days	Thu 2/3/11
20		Establish online profiles	1 day	Thu 2/10/11

Gantt Chart Tools
New Fitness Center Location PR Plan - Microsoft Project
File
Task
Resource
Project
View
Format
Gantt Chart
Paste
Calibri
12
Mark on Track
Respect Links
Inactivate
Manually Schedule
Auto Schedule
Inspect
Move
Mode
Task
Information
Scroll to Task
View
Clipboard
Font
Schedule
Tasks
Insert
Properties
Editing
Timeline
Start
Tue 2/1/11
Feb 6, '11
Feb 13, '11
Feb 20, '11
Finish
Fri 2/25/11
Gantt Chart
30, '11
Feb 6, '11
Feb 13, '11
Feb 20, '11
Feb
M T W T F S S M T W T F S S M T W T F S S M T W T F S S
Director PR,PR Assistant 2,PR Manager,VP Marketing
Director PR,PR Manager
2/3
Video Vendor,PR Manager
PR Manager,Video Vendor
2/15
Video Vendor,DVDs[30 DVD]
PR Assistant 2
PR Assistant 2[75
PR Assistant 1
PR Assistant 1,PR Assistant 2
2/9
PR Assistant 2,Mailing[$100.00]
PR Assistant 2
Web Designer
PR Assistant 1
Ready
New Tasks : Auto Scheduled

Figure 1-1: You'll probably spend most of your time in Project in outline-like Gantt Chart view.

Becoming a task master

A task can be as broad or as detailed as you like. For example, you can create a single task to research your competition, or you can create a project phase that consists of a *summary task* and *subtasks* below it. For example, the summary task may be Competitive Research, with the subtasks Researching Online Business Databases, Assembling Company Annual Reports, and Reviewing Competitive Product Lines.

REMEMBER

Adding tasks to a Project file doesn't cost you a thing (except a nanobit of memory), so a project can have as many tasks and as many phases as you like. You simply use the outlining structure in Project to indent various levels of tasks. The more deeply indented in an outline a task is, the more detailed the task.

One handy thing about this outlining structure is that you can roll up all the timing and cost data from the subtasks within your phases into summary-level tasks. Three sequential subtasks that take a day each to complete and cost you $200 apiece result in a summary task that spans three days and costs $600. You can view your project at various levels of detail or get automatic tallies of timing and costs if you prefer to simply view the summary level of tasks.

For more about defining and creating tasks, check out Chapter 4.

All in the timing

They say that timing is everything: Rome wasn't built in a day, a stitch in time saves nine, and don't even ask me about how long it takes to get to retirement. The importance of timing applies to Project tasks, too. Almost all tasks have timing — referred to as *duration* — which is the amount of time needed to complete the task.

The only tasks without duration are milestones. A *milestone* — in most cases — is a task of zero duration. In essence, it simply marks a moment in time that must be reflected in your Project outline. Typical milestones are the approval of a brochure design and flipping the switch to start up an assembly line. Such tasks don't involve any real work or effort, but they must be completed for the project to move ahead.

Project doesn't provide magic formulas for duration: You assign duration based on your own experience and judgment. Does designing a product package take three days or three weeks? Will obtaining a building permit happen in a day or a month? (Remember that you're dealing with city hall, so think before you answer!) Project isn't an oracle: You have to provide facts, figures, and educated guesses to build your Project schedule. After that information is entered, though, Project can do some wonderful things to help you maintain your schedule and monitor your progress.

Task dependencies

The final piece in the puzzle of how long your project will take is the concept of *dependencies,* or the timing relationships among tasks. If you have a schedule that includes ten tasks that all begin at the same time, your entire project will take as long as the longest task (see Figure 1-2).

After you define and implement timing relationships among tasks, your schedule can stretch over time like a long rubber band. For example, one task may begin only after another is finished. Another task can start halfway through the preceding task. The second task cannot start until a week after the first task is finished. Only after you start to assign these relationships can you begin to see a project's timing as related to not just each task's duration but also the specific ways in which the tasks relate to each other.