



PROJECT MANAGEMENT PRACTICE INC.

Infinite Possibilities - Measurable Results



Microsoft Project 2010 – Core Essentials

Robert Happy, PMP, MCT, MCTS

Project Management Practice Inc. (PMPI)

www.pmpractice.com

PROJECT MANAGEMENT PRACTICE INC.

Who Is Robert Happy, PMP, MCTS, MCT?

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(707) 280-8560

- 18 yrs project management consulting and training experience
- Published multiple articles and training programs on PM and Microsoft Project
- Worked with 100's of organizations and 1000's of individuals to optimize PM



- PMP certified and senior level consultant with Franklin Covey
- Founding partner and executive team member of Project Management Practice, Inc. (PMPI)
- Implemented multiple custom PMO's, processes, systems for large and small – private and public sector

www.pm-practice.com



Program Overview

- Morning Session - Introduction:
 - Part 1 – Getting Started The Right Way & Key Planning Essentials
 - New: Ribbon; New Default View; UCS; Top Down Summary
 - Part 2 – Planning Essentials & Resource Management
 - New: Team Planner View; Overallocation Tools; Change in Formula
- Afternoon Session - Advanced:
 - Part 3 – Communicating Essentials and Master Plans
 - New: Views; Formatting; Collaboration & Reporting
 - Part 4 – Updating and Tracking Essentials
 - New: Inspector; Inactive Tasks;



Training Will Help

Recent Microsoft customer research that shows that “with just two days of training, Project users score 30-50 % higher on ease of use, usefulness, importance and satisfaction in using the tool.

Real World Scenario: Client with no previous Project training – moving from frustrated PM’s to enabled PM’s

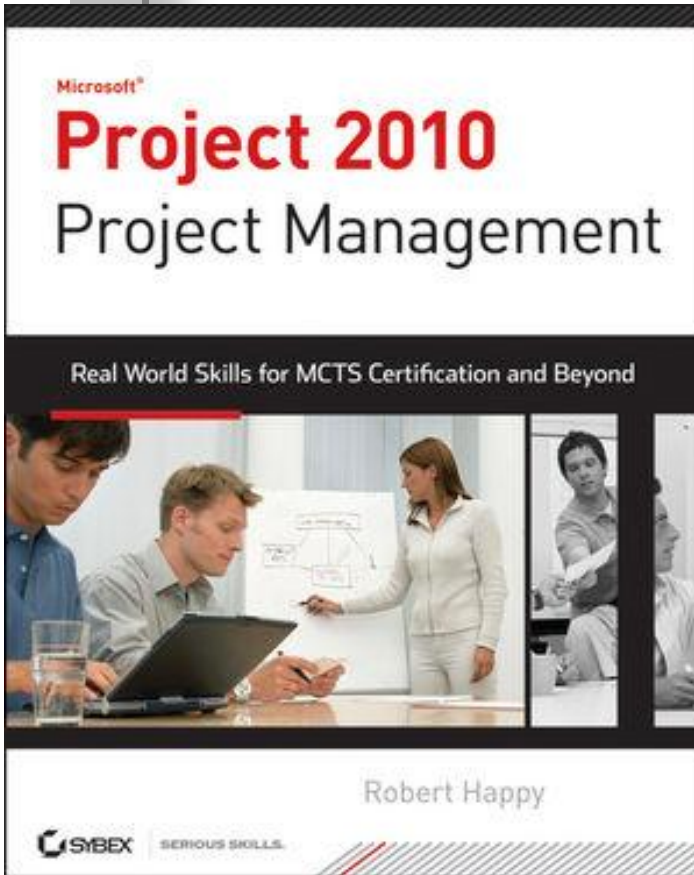


Microsoft Project Certification

- As project management has grown, organizations have asked Microsoft to help make it easier to identify individuals that have knowledge and expertise in the field and with Microsoft Project
- Project 2010 certification – 70-178: Microsoft Project 2010, Managing Projects, will be offered in the fall of 2010 and will be a live-app, performance based exam focused on desired outcome and results.
- Certification program was created to help make the identification of skilled project managers easier.

Real World Scenario: How many potential or existing PM's say they know how to use Project but do not use it effectively

Project 2010 Project Management



Get the most out of Microsoft's latest release of the popular project management tool, Project 2010, with this comprehensive guide from Author Robert Happy.

ISBN: 978-0470561102

Price: \$49.99

Available: NOW!

Pages: approx. 500

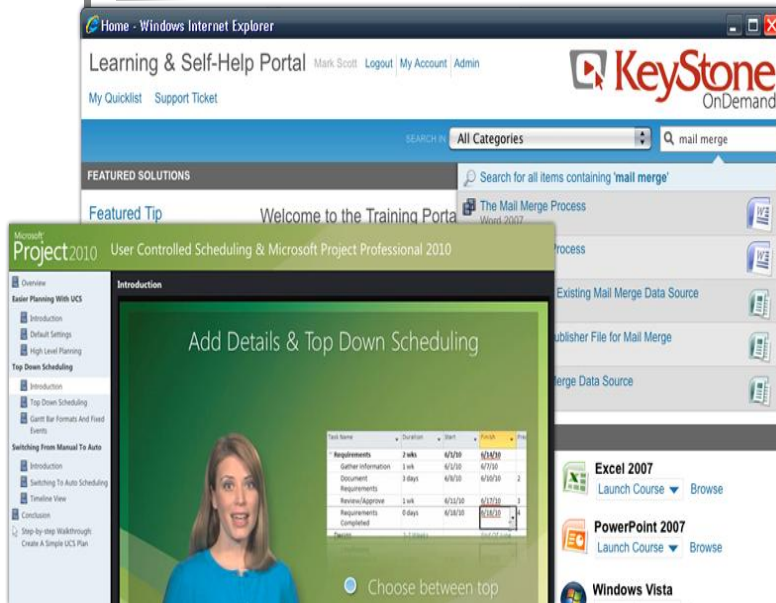
Media: CD, with videos, sample files, and PDF of book

Can be ordered - from your favorite bookstore, including Amazon, Borders, Barnes&Noble, or check out www.pm-practice.com

Note: Prepares Candidates for **Certification** Exam 70-178, Microsoft Project 2010, Managing Projects – Exam Available Date - TBA

Video Based eLearning (CBT) Training for Project 2010 or Project 2007

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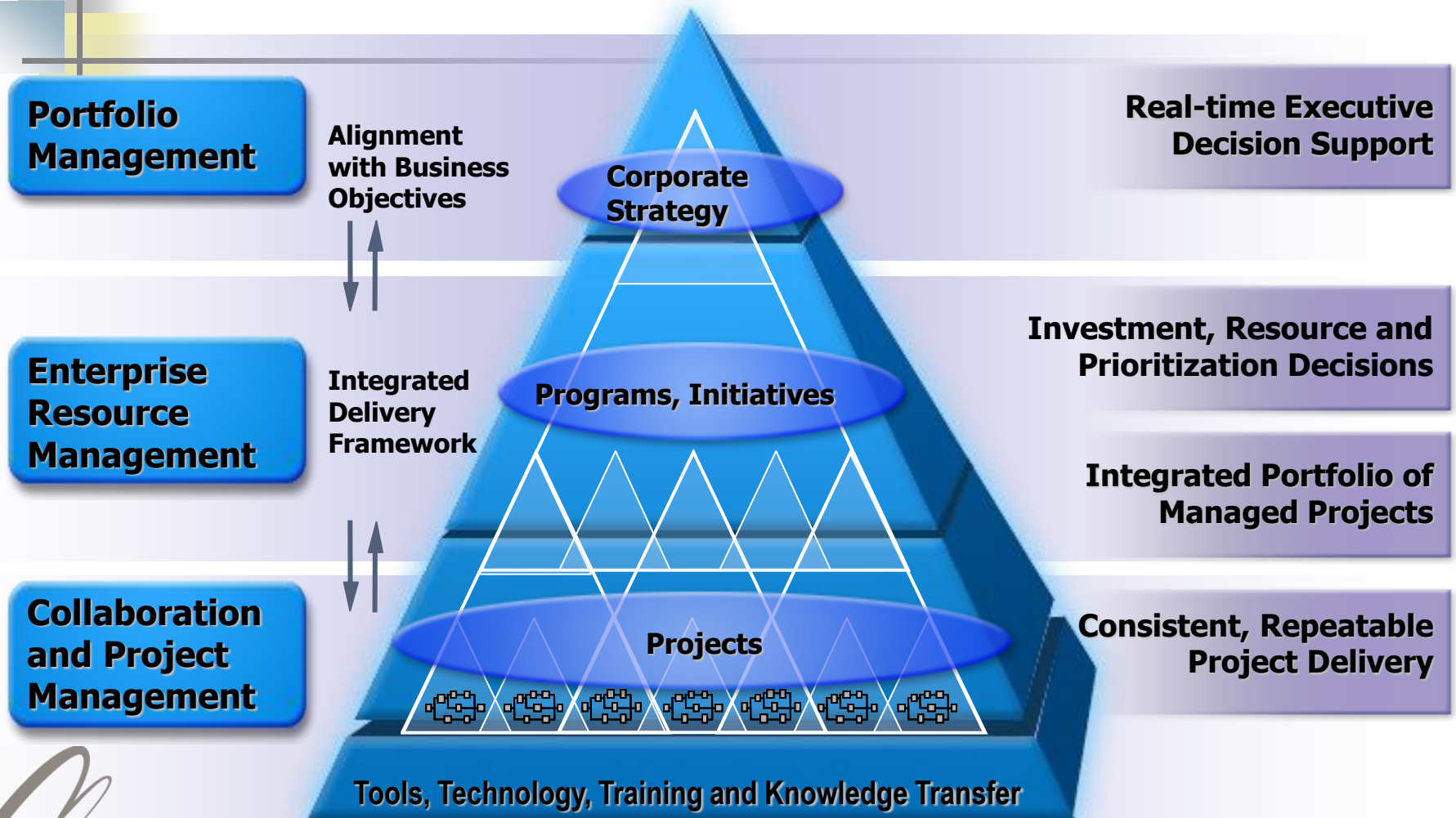
Includes: 100 + lessons, Videos, Sample Files, Quizzes, Exercises, and complete KeyNotes.

Media: Online or DVD-ROM.

"I just finished taking your course on Microsoft Project Core Essentials, and absolutely loved it! I plan on sitting for my MCTS exam...Thank you once again for a fantastic class!"

Unsolicited email from a certified PMP customer

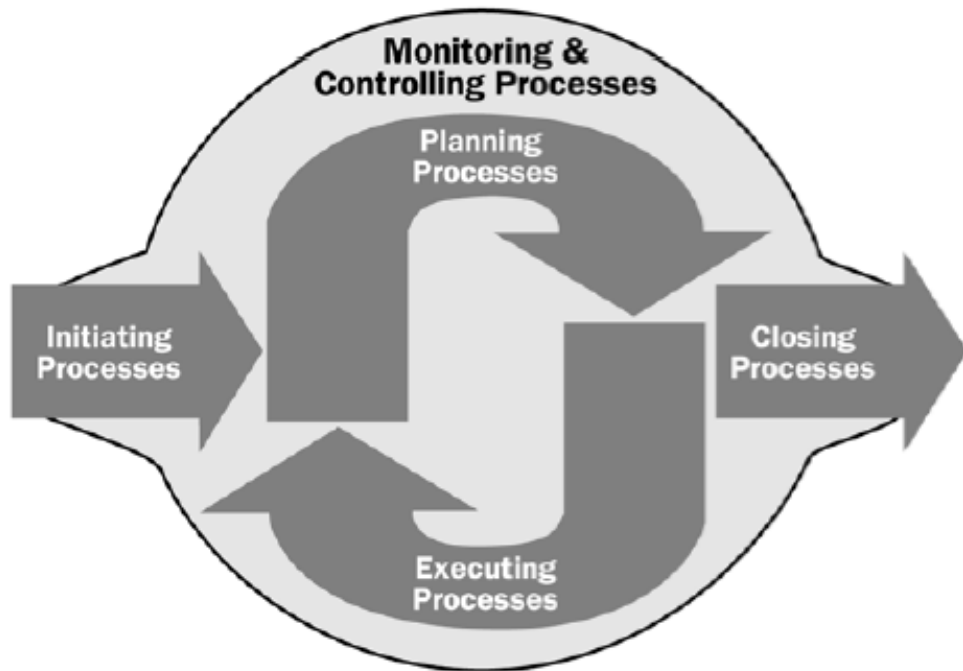
Strategic Fit of Project 2010



PMI Process Groups

1. Initiating
2. Planning
3. Executing
4. Monitoring & Controlling
5. Closing

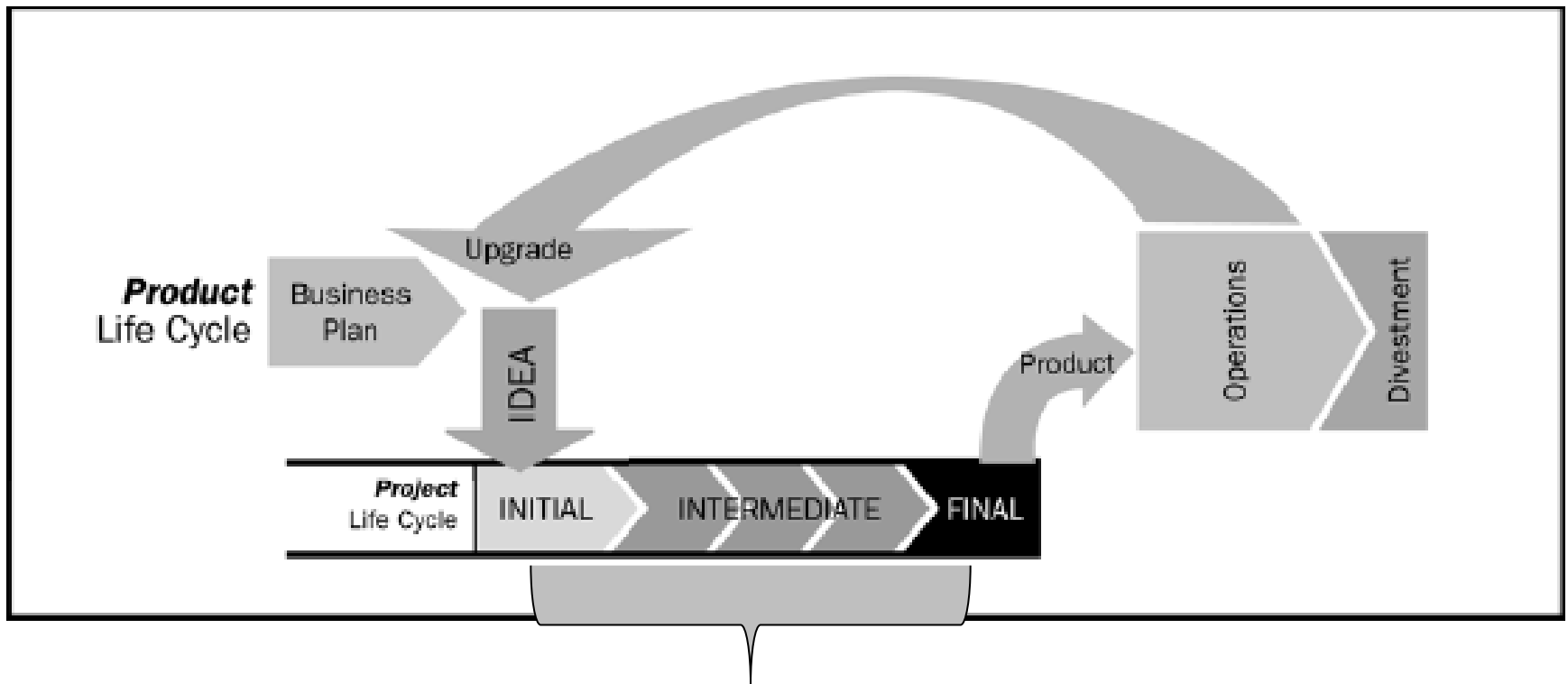
**Project better
supports Modern Day
Project Management
Techniques**



Reprinted from PMI PMBOK 4th Edition

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PM Life Cycle vs. Product Life Cycle – PMBOK Guide



Project as an Enabling Tool Here

Communicating to Multiple Stakeholders – No Easy Job





PM's Spend Significant Time Communicating – A Key to Success

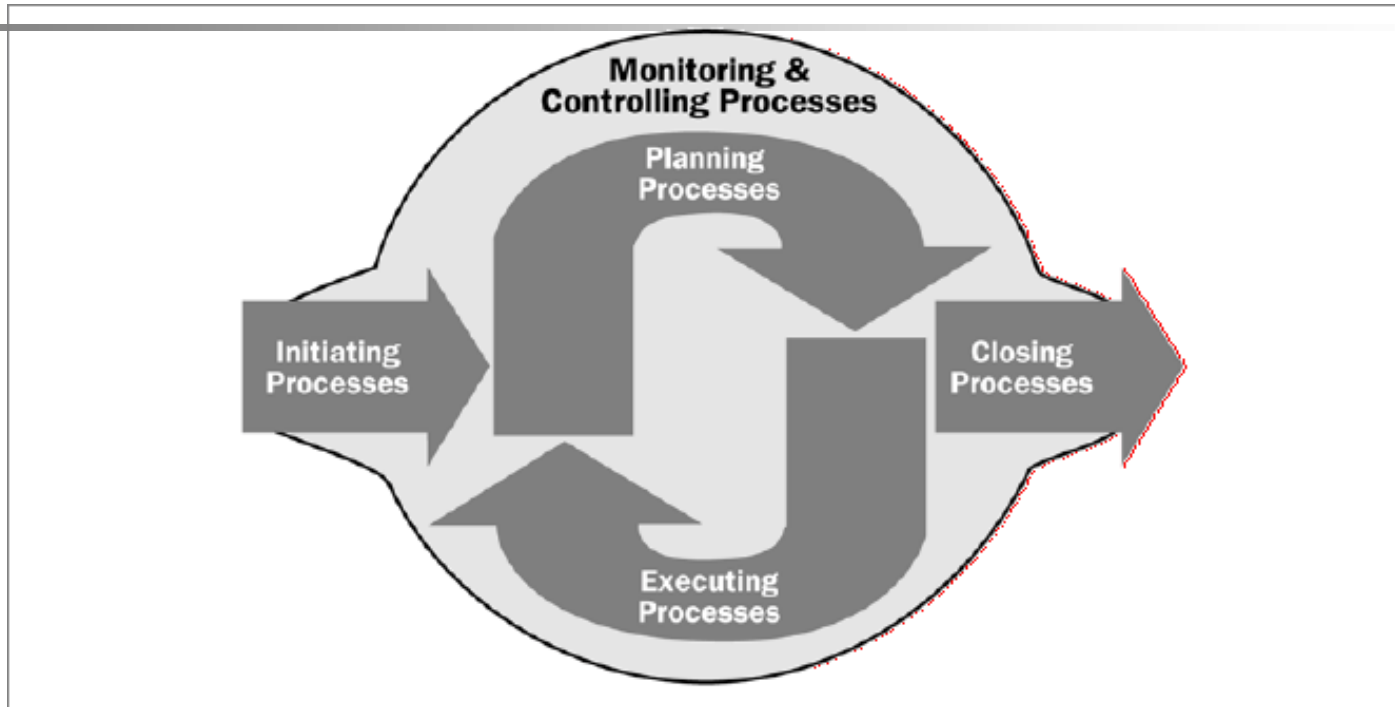
- As the number of people involved in the project increases, the number of potential communication channels increases.
- The following formula represents the number of potential communication channels that may exist:

$$n(n-1)/2$$

- **5 people = 10 channels**
- **10 people = 45 channels**
- **20 people = 190 channels**

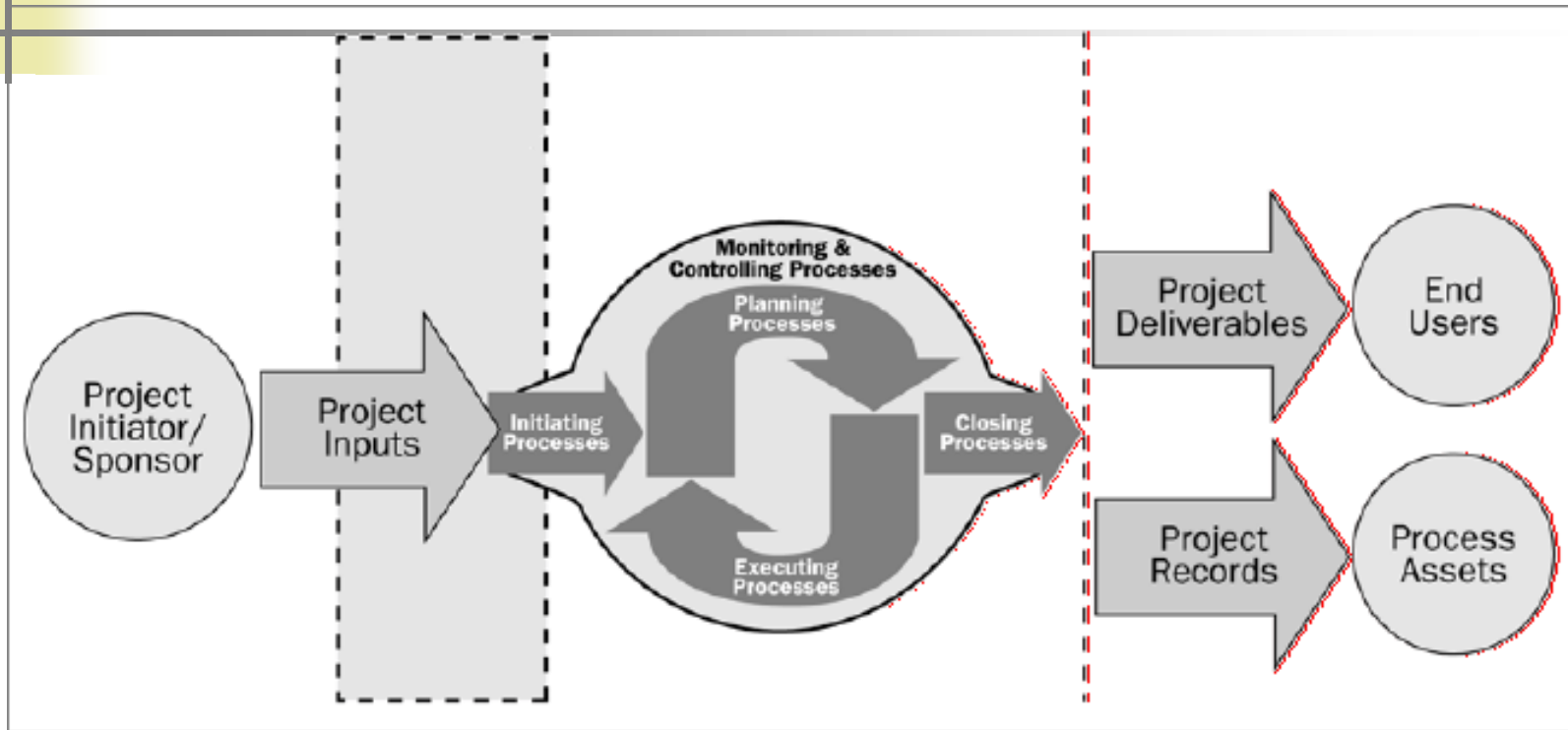
- 
- Manage your communication effectively

PMI Process Groups



Project is an enabling communication & reporting tool for each PM Process

As You Drive Toward Deliverables – Use Project to Help Keep Project Records



Communicating Change and the Impact on the “Triple Constraint”



- Managing change and communicating the impact on scope, cost, resources, time is key to successful project management.
- Project is specifically designed with powerful communication and reporting tools so you can keep your stakeholders aligned

What's Next – Use Different Fields & Tables?



- Using the default Entry table
- Change from one table to another
- Insert or hide columns in an existing table
- Move columns around by clicking and dragging
- Creating New Fields
- Creating New Tables



demo

Applying and Creating Fields and
Tables

What We Discussed – Applying Different Tables & Fields

- Default Entry table
- Changing & creating tables
- Changing & creating fields
- Inserting or hiding columns in a table
- Clicking and dragging to move columns in a table



What's Next – Applying Filters, Highlights and Groups

- Apply filters
 - Filter for Milestones
 - Using the Date Range filter
 - Filter for Resources
- Using the Autofilter function
- Using the Highlights
- Apply groups from
 - Group by Milestones
 - Group by Critical Tasks



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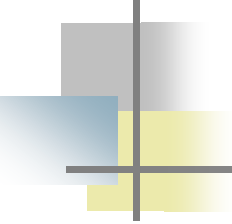
Groups, Filters & Highlights

What We Discussed – Using Filters and Groups



- Applying filters
- Using different filters such as milestones, date range, and resources
- Using the Autofilter function
- Applying Highlights
- Applying groups
- Grouping by Milestones
- Grouping by Critical Path

Apply Different Views

- 
- Use the Timeline View
 - Use the Team Planner View
 - Use Calendar View
 - Use Network Diagram
 - Apply the Task Usage View
 - Apply the Resource Usage View
 - Create various split screen views such as with a resource graph



demo

Using Different Views

What We Discussed - Using Different Views



- Timeline & Team Planner View
- Understanding the Calendar view
- Network Diagram view
- Task Usage view
- Resource Usage view
- Split screen with Resource Graph



What's Next –More Collaborating & Reporting Capabilities

- Visual reports
- Discover other pre-defined reports
- Use Enhanced Copy and Paste
- Use the Save & Send for different formats
- SharePoint Synchronization



demo

Reports



What We Discussed – Collaborating & Reporting Capabilities

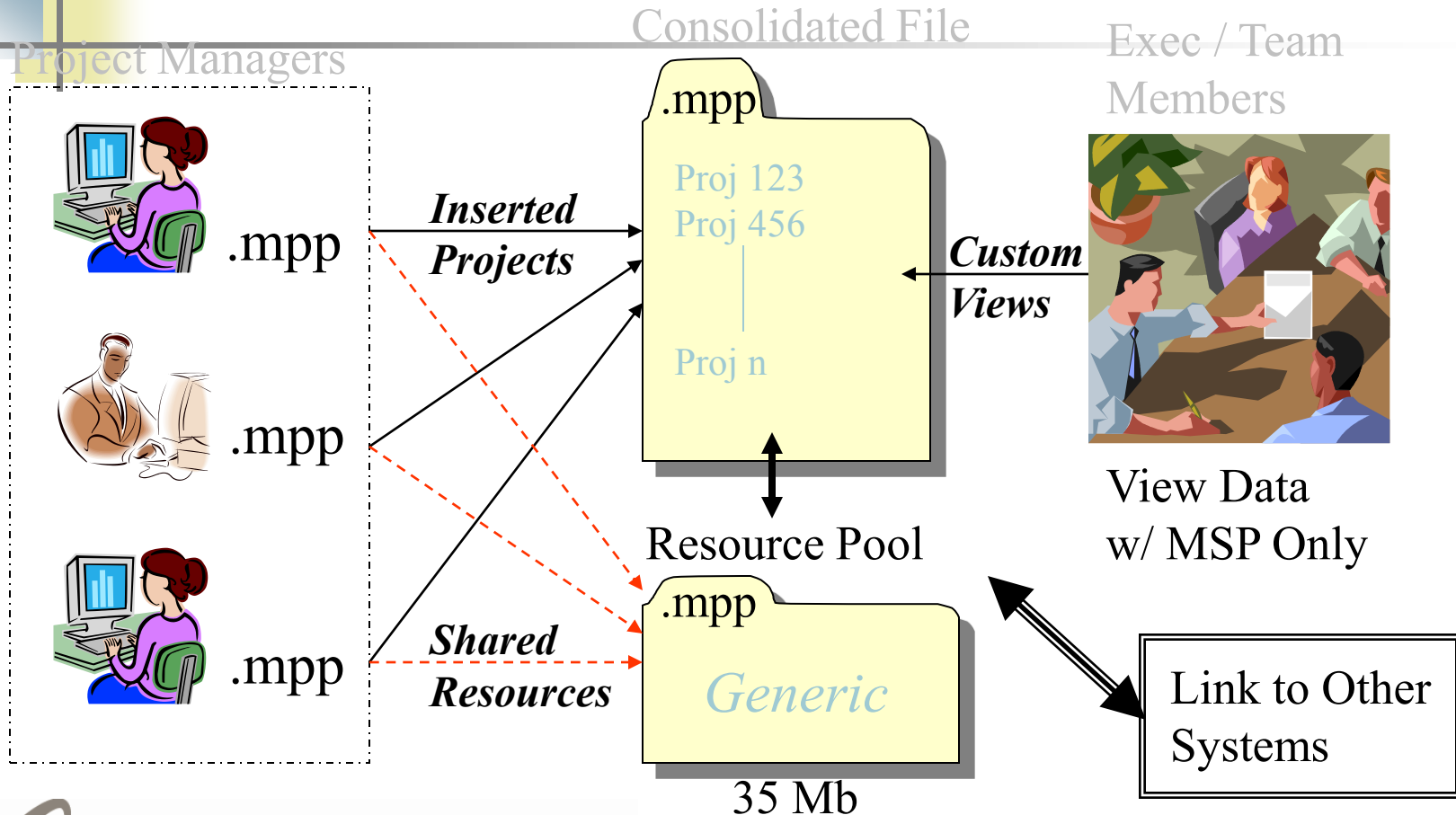
- Using 'Visual' and pre-defined reports
- Using the Save & Send
- Synchronize with SharePoint
- Use Enhanced Copy & Paste



What's Next –Master Schedules

- Creating Master Schedules
- Cross Project Dependencies
- External Predecessors and Successors
- Creating and Sharing a Resource Pool
- View Resource Assignments Across Projects

Using Project without Server





demo

Master Schedules



What We Discussed–Master Schedules

- Master Schedules
- Cross Project Dependencies
- External Predecessors and Successors
- Sharing a Resource Pool
- View Resource Assignments Across Projects



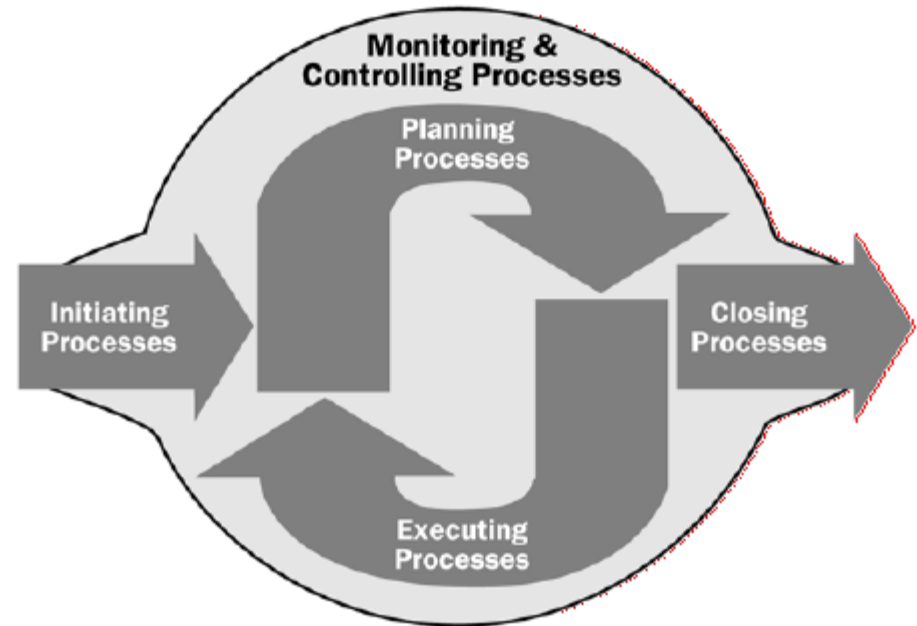
Updating and Tracking

- Project Management Fit
- Understanding and Setting Baselines
- Setting Up Tracking Views
- Updating Your Plan (%Complete and Actuals)
- Analyzing Your Plan

PMI Process Groups

1. Initiating
2. Planning
3. Executing
4. Monitoring & Controlling
5. Closing

Tracking & Analyzing



Set-up an Effective Tracking View and Understanding & Setting Baselines

- The baseline vs. the current plan
- Set the baseline
- Reset or clear a baseline
- Multiple Baselines
- Use the Tracking Gantt view to help
- Apply the Variance Table
- Use the Tracking Functions




demo

Set Up Tracking View



What We Discussed - Understanding & Setting Baselines Setting Up Tracking Views

- Understanding the baseline vs. current plan
- How to set the baseline
- Resetting or clearing a baseline
- Using the Tracking Gantt view
- Using the Variance table
- Turning on the Tracking Toolbar



What's Next – Updating % Complete & Actuals

- Easily mark tasks done with % Complete
- Enter actuals with the Update Tasks tool from the tracking toolbar
- Use the Task Inspector
- Use the Inactive Task feature
- Use the automatic update function
- Tracking Table



demo

Updating - % Complete & Actuals



What we Discussed – Updating Tasks

- Using % Complete to mark a task done
- Entering actuals with the Update Tasks button from the Tracking Toolbar
- Task Inspector & Inactive Tasks
- Automatic Update function
- Using Tracking table



What's Next –Analyze Change Impact and Take Corrective Action?

- Apply the Slipped Tasks filter to help
- Use Group By Critical at the same time as the Slipped Task filter
- Easily analyze my plan using filters and groups together
- Modify my plan to bring it back on track
- Use the notes field to keep track of changes



demo

Analyze Plan & Take Corrective Action



What We Discussed – Analyzing Change and Taking Corrective Action

- Using the filtering and grouping tools to analyze changes
- Using the Show Change Highlighting tool to view the impact of making changes
- Modify the plan to bring it back on track
- Using the notes field to record reasons for changes



End of Program

- Part 1 – Getting Started The Right Way & Key Planning Essentials
- Part 2 – Planning Essentials & Resource Management
- Part 3 – Communicating Essentials and Master Plans
- Part 4 – Updating & Tracking Essentials Next Steps
 - By Book and/or eLearning
 - Get Certified – Exam 178, Microsoft Project 2010, Managing Projects (coming soon)
 - Call PMPI for further assistance anytime



What's New in Project 2010?

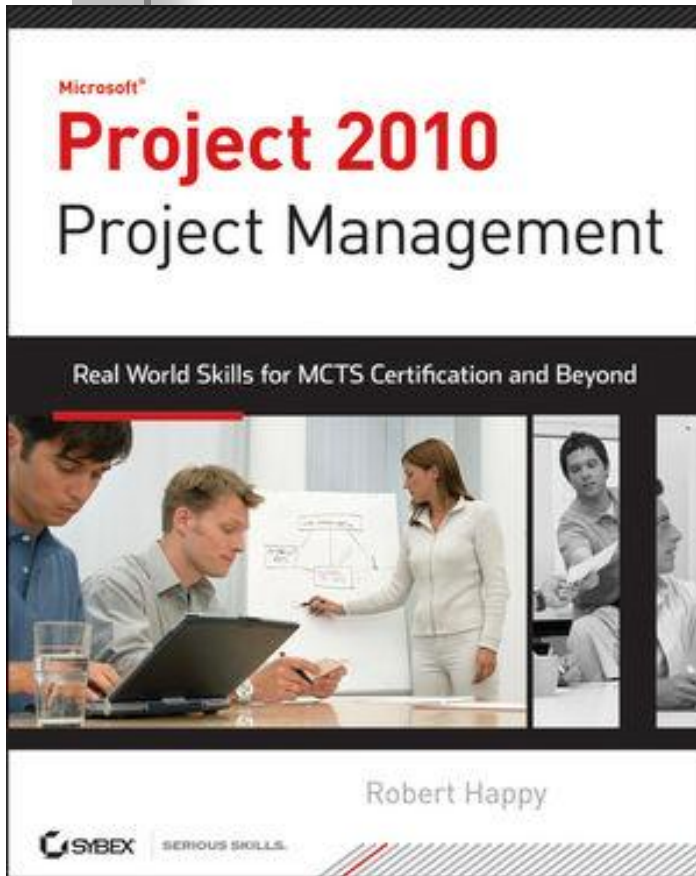
- Improved Interface
 - Ribbon style commands to better support how you plan and manage schedules
 - Backstage for managing files and Project environment options
 - Most common commands are one click away
- User Controlled Scheduling
 - Choose to Manually schedule for an easy to use Excel like interface or take full advantage of the powerful schedule engine with Auto Schedule
 - Create Top-Down Summary Tasks that don't use roll-up for scheduling and even compare to details
 - Inactivate tasks to retain information without deleting (Professional Investment)



What's New in Project 2010 (cont'd)...

- **New Viewing Options**
 - Timeline view to see the big picture – part of the default view
 - The Team Planner for resource management and drag and drop resources scheduling (Professional Investment)
 - New Gantt chart bar styles
 - Easier View Creation and Customization
- **Better Analysis**
 - 'Task Inspector' shows why a task is scheduled where it is and allows action to correct
 - Move Tasks to reschedule forward or back
 - Project Version comparison now includes Gantt bars
- **Easier Collaboration and Sharing of Information**
 - Sync with SharePoint lists (Professional Investment)
 - Save to PDF for easier sharing
 - Enhanced Copy and Paste

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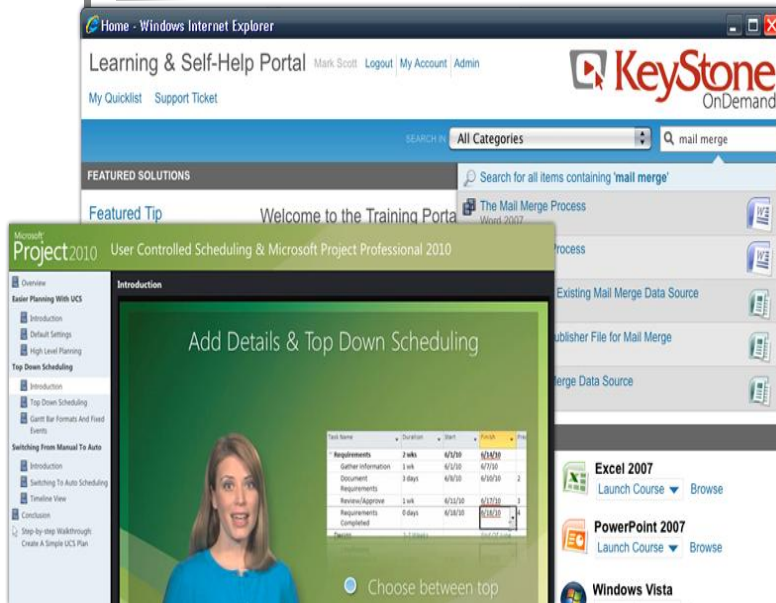
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Project Management Practice, Inc.

Microsoft Gold Certified Partner

PMI Registered Education Provider

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- Provides **consulting and training** services to support the successful implementation of PM solutions:

* **PM Training**

* **PM Systems**

* **PMO Set-up**

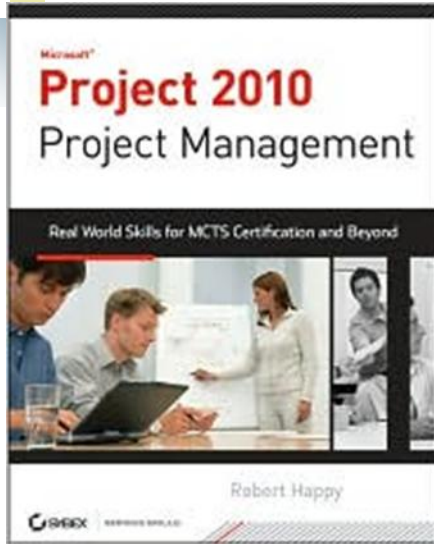
* **PM Support**



- Providing the most effective roles based **knowledge transfer** programs available today
- Offers **world-class** consultants and trainers and can integrate with key disciplines within your current environment to establish a **high performance project management** culture



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Infinite Possibilities - Measurable Results



For 25% off Book – Project 2010, Project Management (hardcopy or pdf)

Use CODE: **PROMO25** at check out



Total Combined Length	7 Hours
Level	Beginner to Advanced
Instructor	Robert Happy
Course Outline	View
System Requirements	Online DVD
DVD-ROM Delivery	\$469 Buy
Online Delivery	\$449 Buy

For 50% off CBT Microsoft Project 2010

Use CODE: **ELearn50** at checkout

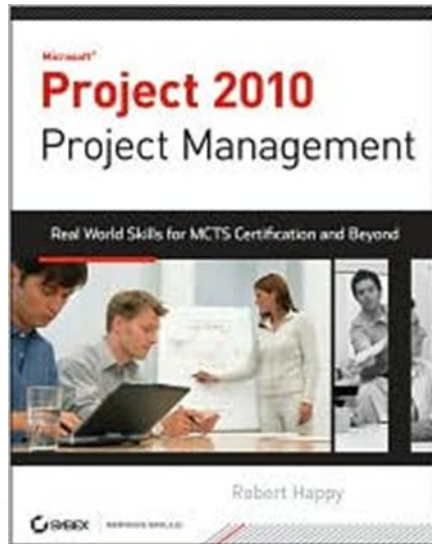
Purchases must be through www.pm-practice.com - offer expires 05/26/11

Questions & Answers

Robert Happy – (707) 280-8560

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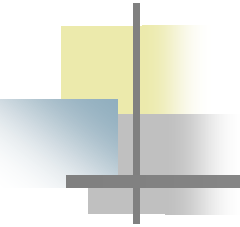
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Email: Chowder@pmpractice.com



THANK YOU!



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