



PROJECT MANAGEMENT PRACTICE INC.

Infinite Possibilities - Measurable Results



# Microsoft Project 2010 – Core Essentials Introduction Session

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Project Management Practice Inc. (PMPI)

[www.pmpractice.com](http://www.pmpractice.com)



PROJECT MANAGEMENT PRACTICE INC.

# Who Is Robert Happy, PMP, MCTS, MCT?

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- 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

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# Program Overview

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- 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

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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*



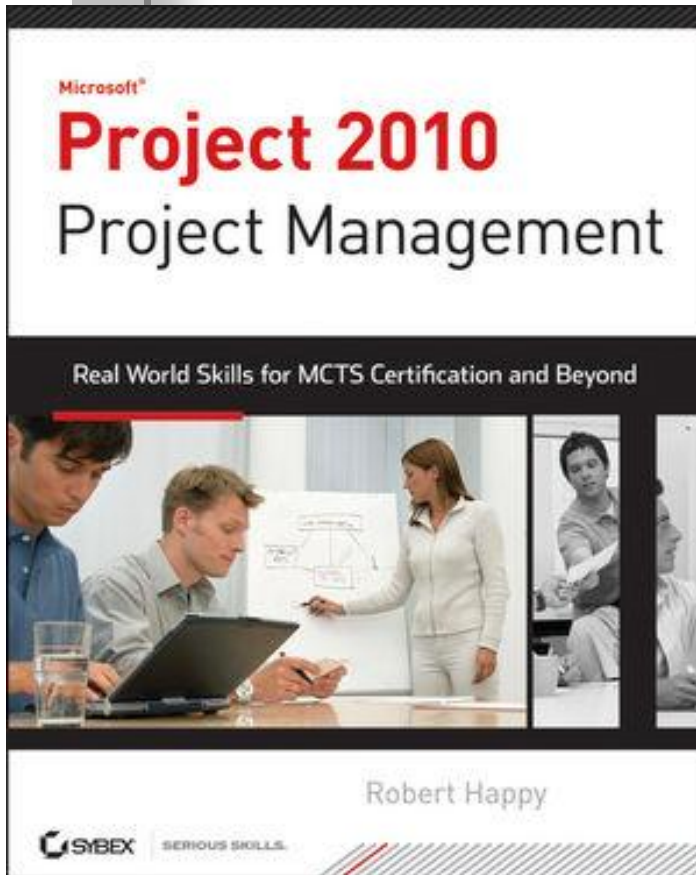
# Microsoft Project Certification

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- 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

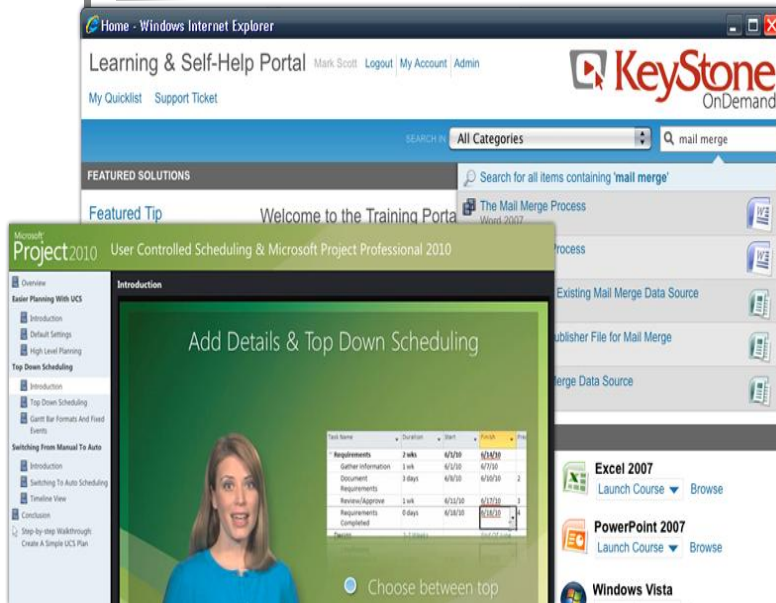
**Media:** CD, with videos, sample files, and PDF of book

Can be ordered - from your favorite bookstore, including Amazon, Borders, Barnes&Noble, or check out [www.pm-practice.com](http://www.pm-practice.com)

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

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**Price:** \$449- \$399

**Available:** Now

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

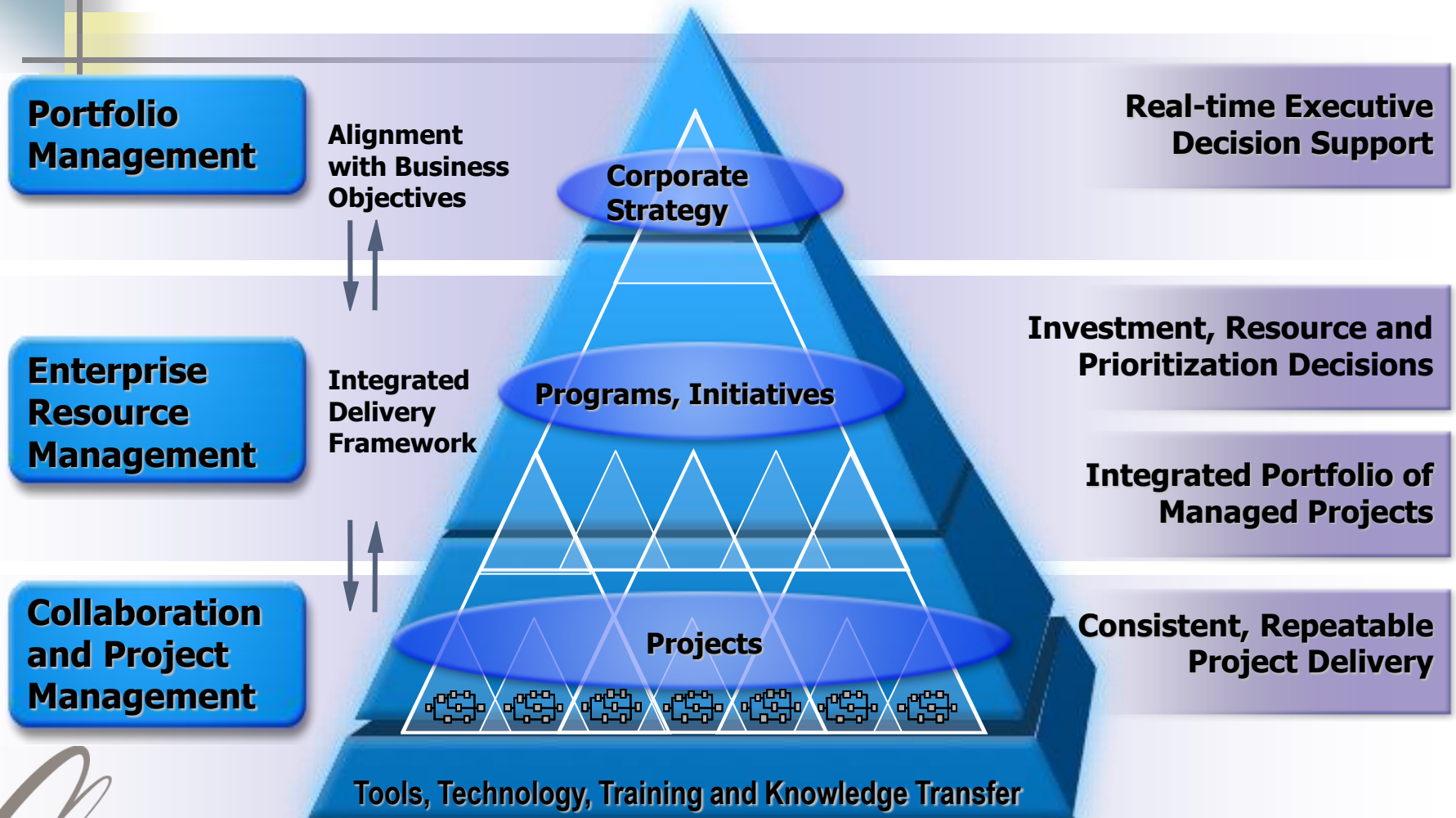
**Media:** Online or DVD-ROM.

"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

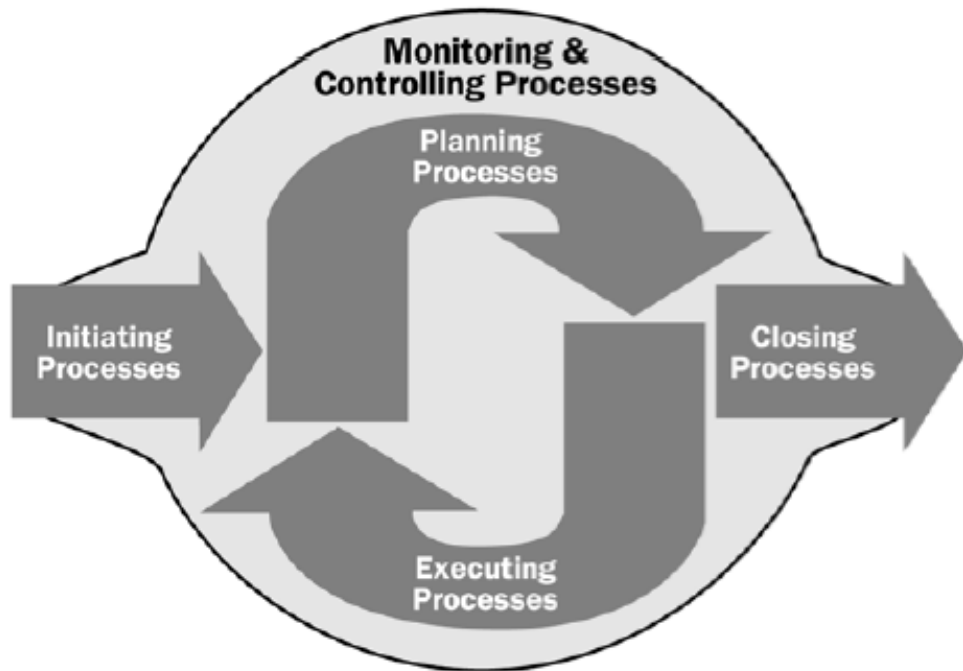




# PMI Process Groups

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

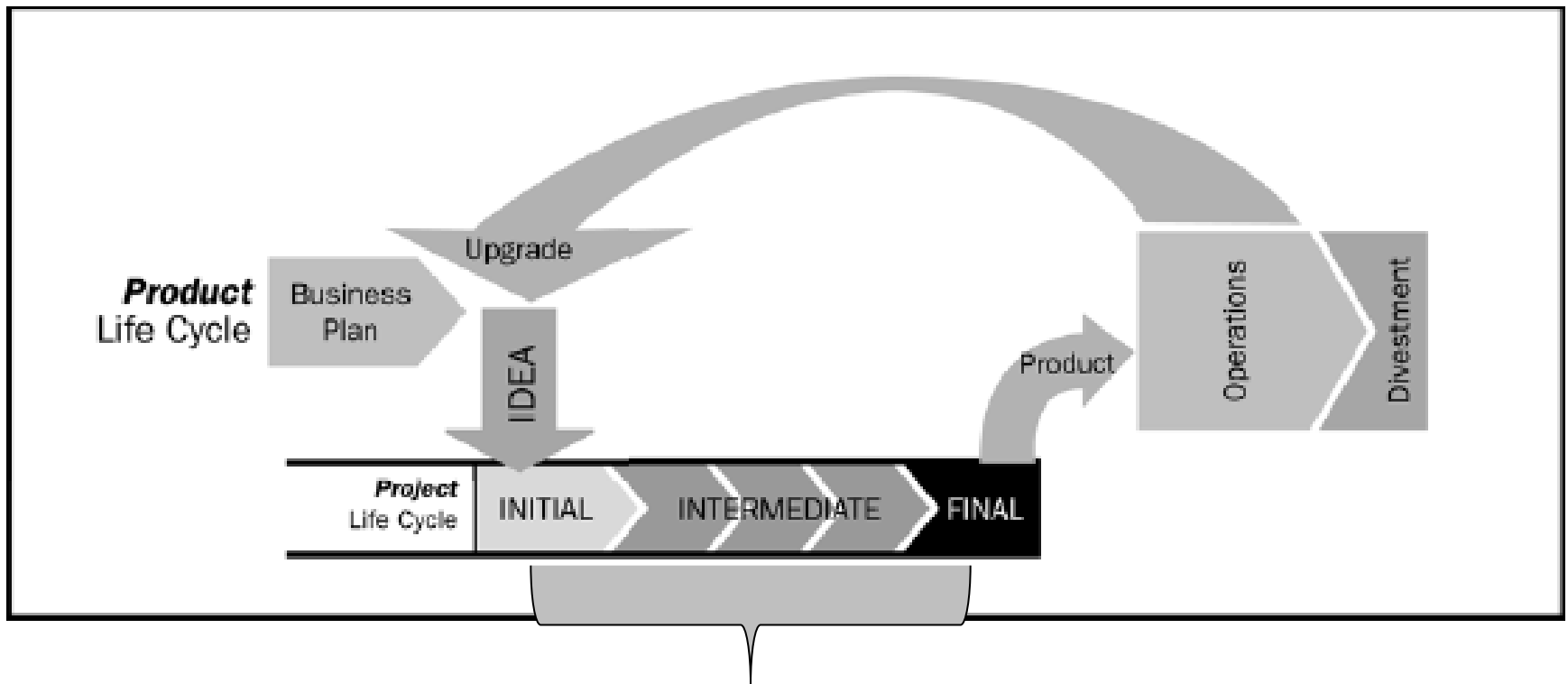
**Project better  
supports Modern Day  
Project Management  
Techniques**



Reprinted from PMI PMBOK 4<sup>th</sup> Edition

Copyright PMPI 2010

# PM Life Cycle vs. Product Life Cycle – PMBOK Guide



**Project as an Enabling Tool Here**

# Constraints Projects Have to Live By



Managing your constraints  
with Project 2007

- A project manager is responsible for accomplishing project objectives
  - within scope
  - on time
  - within budget
- Project quality is impacted by managing these three key factors
- Project is specifically designed for this purpose with easy to use tools for small or big projects

# How Do I Get Started?



- Overview of the new look
  - Gantt Chart with Timeline view
  - Zoom Slider, Status Bar Area
- New Ribbon Interface
  - Logical Groupings of Commands
  - Easily Customize Quick Access Toolbar
- Checking out the 'Backstage'
  - Managing project files and templates
  - Adjust Key Project Options to meet your needs
- Define the project start date
- Apply calendars that match how we work



# demo

## Getting Started



# What We Discussed - Getting Started

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- Moving around the new Gantt view & New Ribbon
- Changing views and the timescale
- Creating split screens (timeline/details)
- Defining the project start date
- Applying different calendars
- Key Option Settings (manual vs. automatic)



# What's Next – Planning Essentials



## PMPI's 4 Key Steps to Planning Effectively

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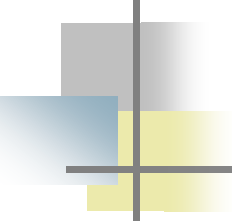
- Step 1: Enter the Work Breakdown Structure (WBS) & Task Arrangement
- Step 2: Estimating Duration (or Work)
- Step 3: Setting Dependencies (Networking)
  - Constraints & Deadlines
  - Understanding the Critical Path
- Step 4: Assigning Resources/Costs
  - Team Planner View
  - Resource Leveling
  - Assignment Units vs. Peak Units



# Step 1- Easily Enter Phases, Tasks and Milestones

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- The importance of the Task Name column
- Bring in plans from Excel
- Use the indent/outdent key to create different outline levels
- Use the Show Outline button to expand/collapse the plan
- Easily insert, delete or move tasks
- Automatically turn on a Project Summary Task
- Automatically turn on the outline number codes



# Planning & the Work Breakdown Structure (WBS)

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Begin with the end in mind - breaking the project down into manageable components is known as the Work Breakdown Structure

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A hierarchical organization of work.



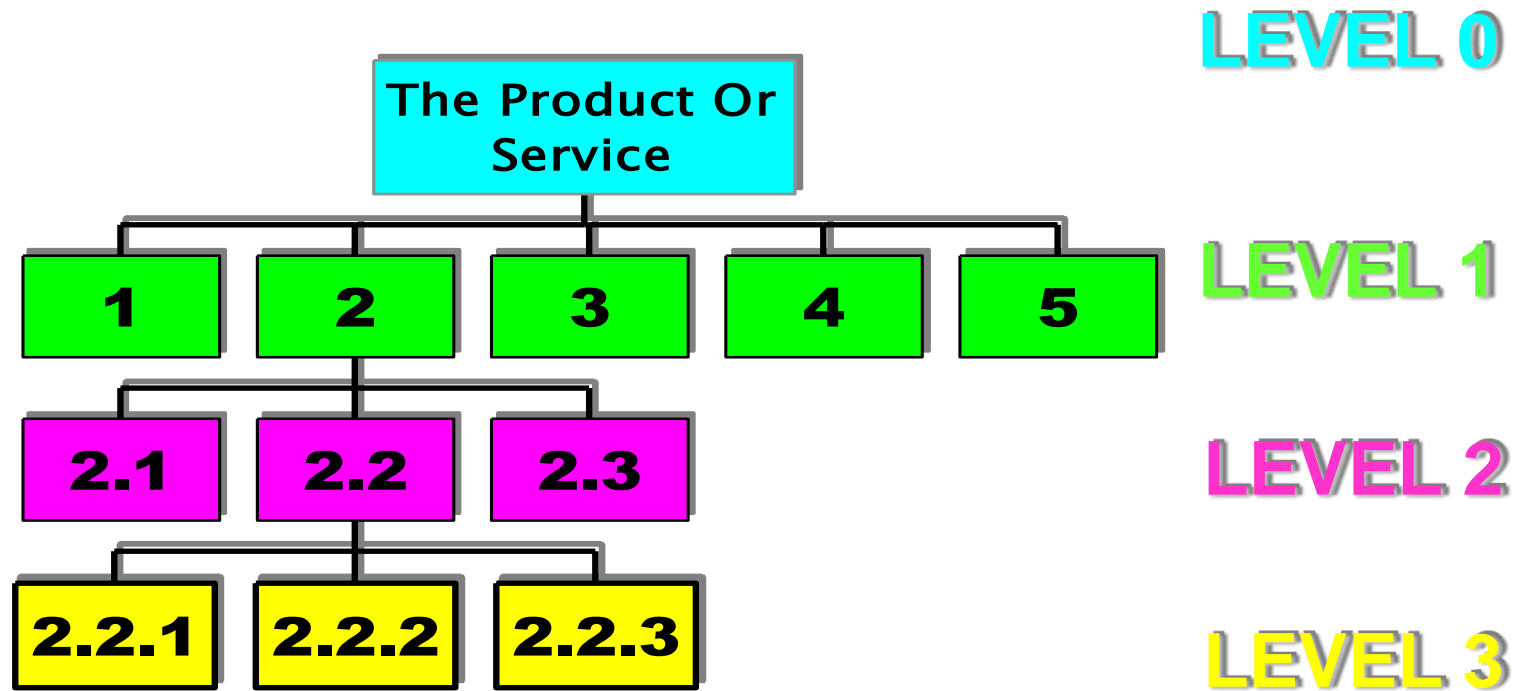
# Work Breakdown Structure

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- WBS groups and organizes the project elements into a chart or outline format.
- The WBS defines the total scope of the project.

*What is not in the WBS is outside the scope!*

# A WBS – Chart Format



# WBS – Outline Format

ID		Task Name
0		<b>WBS Template Example 1</b>
1		<b>1 Phase 1 (Interim Deliverable A)</b>
2		1.1 Task 1
3		1.2 Task 2
4		1.3 Task 3
5		1.4 Task 4
6		1.5 Task 5
7		1.6 Milestone A Completed
8		<b>2 Phase 2 (Interim Deliverable B)</b>
9		2.1 Task 1
10		2.2 Task 2
11		2.3 Task 3
12		2.4 Task 4
13		2.5 Task 5
14		2.6 Task 6
15		2.7 Milestone B Completed
16		<b>3 Phase n (Last Interim Deliverable)</b>
17		3.1 Task 1
18		3.2 Task 2
19		3.3 Task 3
20		3.4 Task 4
21		3.5 Task n
22		3.6 Milestone n Completed





# Deliverables Based WBS

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(0) Final Deliverable

1.0 Interim Deliverable 1

1.1 Task 1

1.2 Task 2

1.3 Task n

1.4 Key Milestone – Deliverable Achieved

2.0 Interim Deliverable 2

2.1 Task 1

2.2 Task 2

2.3 Task n

2.4 Milestone – Deliverable Achieved

3.0 Interim Deliverable n



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Step 1: Enter Phases, Tasks, Milestone  
(Work Breakdown Structure)



# What We Discussed – Enter Phases, Tasks and Milestones

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- Task Name column
- Importing plans from Excel
- Using Enhanced Copy & Paste
- Outlining with Indent/Outdent tools
- Using the Show Outline tool
- Inserting, deleting and moving tasks
- Project summary task
- Using outline number codes



# What's Next: Step 2 - Estimating Duration

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- Using working day conversions
- Manual vs. Automatic
- Enter directly into duration column
- Task information
- Click and drag Gantt bar
- Use split screen view



# demo

## Estimating Duration

# What We Discussed

## - Estimating Duration

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- Estimating duration in terms of working days
- Using the duration column (manual vs. automatic)
- Using the task information box
- Entering duration in the split screen view



# What's Next: Step 3 - Task Dependencies

- Easily use the link and unlink tools
- Enter directly into the predecessor column
- Use the split screen view to add lag
- Change from Finish to Start to Start to Start
- Use the click and drag approach in the Bar area
- Manual Scheduling and Respect the Links
- Top Down Estimating
- Solve problems with the Task Inspector



# demo

## Setting Dependencies



# What We Discussed – Setting Task Dependencies

---

- Using the link and unlink tools
- Entering dependencies directly into predecessor column
- Using the split screen to enter lag or change finish to start to start to start
- Clicking and dragging between tasks to set links
- Top Down Estimating
- Respect Links and Manual Scheduling
- Use the Task Inspector to help



# 6 Key Drivers That Impact the Calculation of Time for Automatic Scheduling

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1. Duration Estimates
2. Project Start Date (Project Information)
3. Calendars
4. Constraints (99%=ASAP)
5. Dependencies (Networking)
6. Resource Assignments ( $W=D*U$ )



# End Of Part 1

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- Getting Started
  - Project Information; Calendars; Key Options Settings
- Planning Essentials – 4 Step Process
  - Step 1 – WBS
  - Step 2 – Estimate Duration (Work)
  - Step 3 – Set Dependencies
- Part 2 – Planning Essentials Continued
  - Critical Path Analysis
  - Constraints & Deadlines
  - Step 4 – Assigning Resources & Costs



# What's Next – Planning Essentials

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## 4 Key Steps to Planning Effectively in Project

- Step 1: Enter the Work Breakdown Structure (WBS)
- Step 2: Estimating Duration (or Work)
  - PERT
- Step 3: Setting Dependencies (Networking)
  - Understanding the Critical Path
  - Constraints & Deadlines
- Step 4: Assigning Resources/Costs
  - Resource Leveling



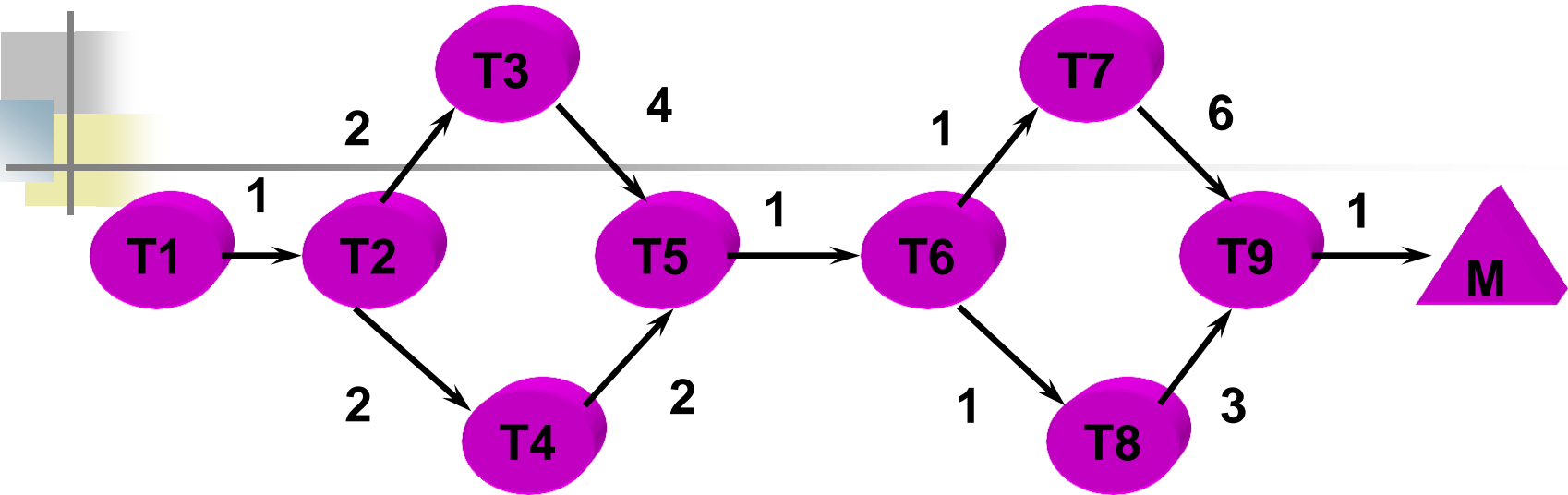


# Critical Path

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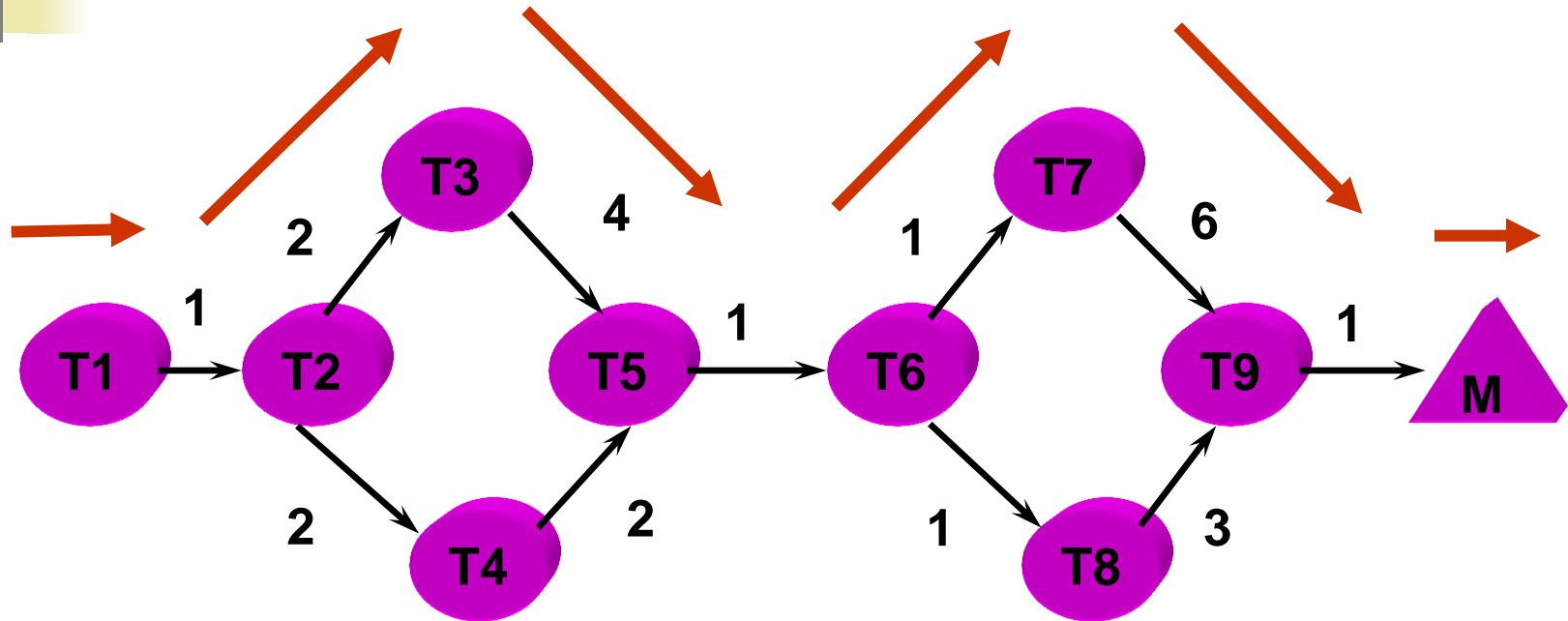
- One sequence of tasks that fixes the duration of the project
- Any slippage of any task(s) on the Critical Path will cause the project to finish later than planned

# Critical Path Network



Task	Early Start	Late Start	Early Finish	Late Finish	Total Slack
T3	3d	3d	7d	7d	0
T4	3d	5d	5d	7d	2
T7	9d	9d	15d	15d	0
T8	9d	12d	12d	15d	3

# Identify the Critical Path





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## Critical Path



# What We Discussed – Reviewing & Analyzing Critical Path

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- What is the Critical Path
- Formatting Text Styles
- Formatting Bar Styles
- Displaying Total Slack
- Managing Your Project Life Cycle



# What's Next – Constraints & Deadlines

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- What are Constraints
- What are Deadlines
- Using Constraints vs. Deadlines
- Must Finish On and Must Start On automatically go on Critical Path
- Use wisely and cautiously
- Be aware of Recurring Tasks



# demo

## Constraints & Deadlines



# What We Discussed – Constraints & Deadlines

---

- What are Constraints
- What are Deadlines
- Using Constraints vs. Deadlines
- Must Finish On and Must Start On automatically go on Critical Path
- Use wisely and cautiously
- Beware of the impact of Recurring Tasks





# What's Next: Step 4 - Assigning Resources & Costs

---

- Setting up a resource pool
- Assign resources in the Resource Name column
- Using the Assign Resource tool
- Modify details with the split screen view
- Using the Team Planner view
- Overview the project summary including total work and costs in Project Statistics



# MS Guest Wireless

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- Username: usmsguest
- Password: H473i95b

# Assigning Resources

- Create resources in the Resource Sheet or share an existing resource pool
- When a Resource is added to a task, Work is calculated
- Avoid Assigning to Summary Tasks
- Use the 'Smart Tags'
- Can select 'Multiple Tasks/Resources'
- Use the Assign Resources Icon





# Resource Availability

## MAX UNITS

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- Represents the percentage of the Standard Calendar the resource is available to perform project related work
- If Standard Calendar is 8 hours per day:
  - 100% equates to 8 hours of project work
  - 50% equates to 4 hours of project work
  - 80% equates to 6.4 hours of project work
- Resources are over allocated when their assigned work exceeds their Max Units



# Task Types: $\text{Work} = \text{Duration} * \text{Units}$

---

- DURATION - Period of time over which a task occurs
- **Fixed Duration** task is not affected by the amount of resources or the work of the resources
- A 10-day Fixed Duration task takes 10 days, always



## Task Types: $\text{Work} = \text{Duration} * \text{Units}$

---

- WORK - the amount of time resources spend performing the task
- **Fixed Work** remains the same even if resources are added or removed
- 2-day Fixed Work task takes 2 days of work (amount of resources and duration may change)



## Task Types: $\text{Work} = \text{Duration} * \text{Units}$

---


- UNITS - the allocation percentage for a resource assignment to a task
- **Fixed Units** allows the project manager to edit the work or duration of a task and have the software calculate the work required over the span/duration of the assignment
- A Resource assigned at 50% will remain 50% committed to Fixed Units task regardless

# Effort Driven Scheduling

- A task-level setting that determines if assigning or removing resources from a task affects the total work on the task
- Project keeps the task's total work fixed and redistributes work to the assigned resources any time there is a change in the number of assigned resources on the task
- Fixed Work Tasks are always effort driven, optional for Fixed Duration and Fixed Units



# Work = Duration \* Units



Task Type	When PM adds resource, this will change	When PM changes duration, this will change	When PM changes work, this will change	When PM changes units, this will change
Fixed Duration	Units	Work	Peak Units*	Work
Fixed Work	Duration	Peak Units	Duration	Duration
Fixed Units	Duration	Work	Duration	Duration

\*New In Project 2010 – the units field does not recalculate automatically. It retains the original default estimate of 100% unless manually changed. Instead, it uses the Peak Units field to display fluctuations in work.



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## Assigning Resources & Costs



# 6 Key Drivers That Impact the Calculation of Time for Automatic Scheduling

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1. Project Start Date
2. Calendars
3. Duration Estimates
4. Setting Dependencies
5. Task Constraints (Majority = ASAP)
6. Resource Assignments ( $W=D*U$ )



# End of Introduction

---

- Critical Path Analysis
- Constraints & Deadlines
- Step 4 – Assigning Resources & Costs
  - Step 1 – Enter WBS
  - Step 2 – Estimate Duration (Work)
  - Step 3 – Set Dependencies
  - Step 4 – Assign Resources & Costs
- Next Part 3 – Communicating Essentials



# What's New in Project 2010?

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- 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)

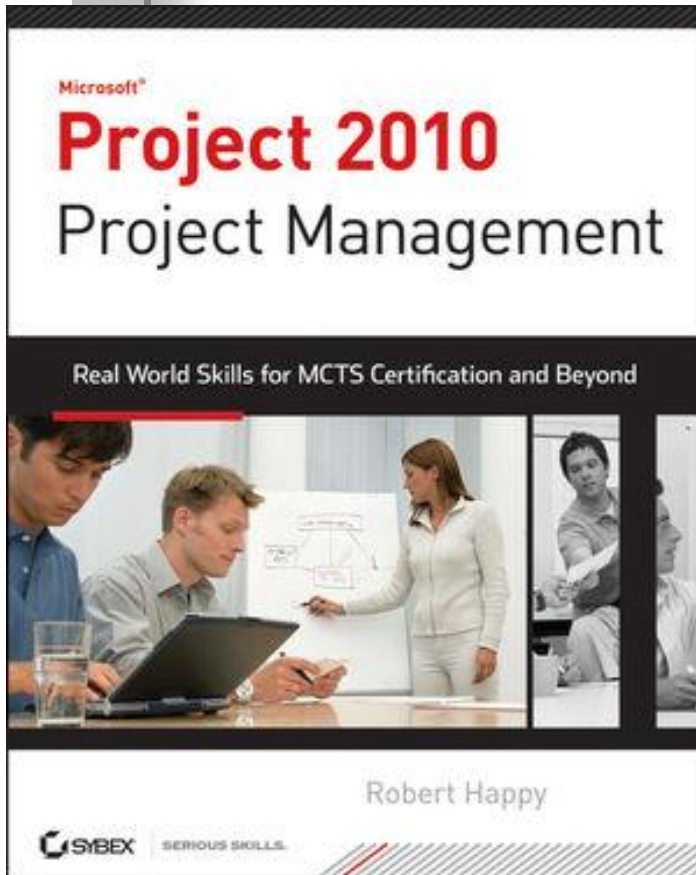


# What's New in Project 2010 (cont'd)...

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- **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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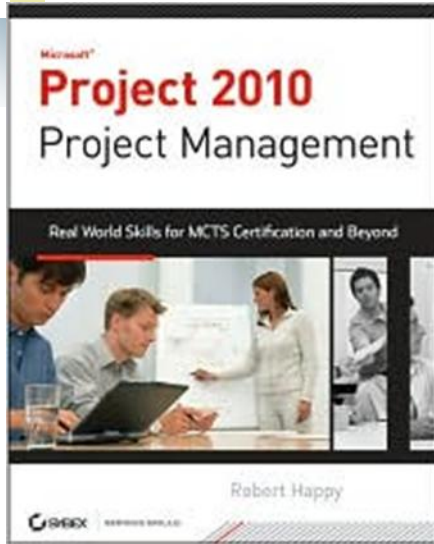
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Instructor	Robert Happy
Course Outline	<a href="#">View</a>
System Requirements	Online   DVD
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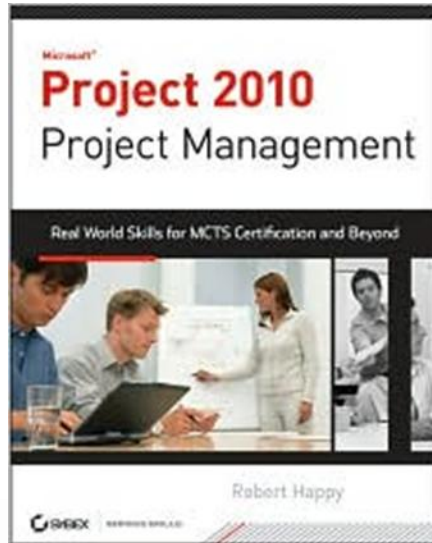
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# Questions & Answers

**Robert Happy – (707) 280-8560**

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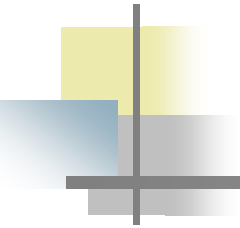
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