Project Management Quick Reference Guide

for Project 2007

Before beginning a new project, an organization must determine whether the project fits its strategic goals. Executives should classify proposed projects that focus on mission-critical activities as high-priority and projects that are peripheral to organization goals as lower priority.

Before work begins, an executive sponsor should be identified. The organization should complete a high-level evaluation of the project's business case, its limitations, and its technical and financial requirements. Finally, a project manager should be identified, who can then set up a project plan in Microsoft Office Project 2007.

Need a more detailed guide to project management with Project 2007? Use the Project Roadmap, available on Office Online.

1. Create a new project file

- To create a new blank project in Project 2007, click **New** on the **File** menu. On the **New Project** task pane, click **Blank Project**.
- To create a new project from a template in Project 2007, click **New** on the **File** menu. On the **New Project** task pane, click **On computer** and then click the **Project Templates** tab. Click the template that you want. If your organization stores templates on the Web, click the **Enterprise Templates** tab.

2. Set the project start date

On the **Project** menu, click **Project Information**. In the **Start date** box, enter your project start date.

3. Define the project calendar

On the **Tools** menu, click **Change Working Time**. Identify working and non-working days and times for your project.

4. Save the project file

On the **File** menu, click **Save**. In the **File name** box, type the project name.

If you are publishing the project to Microsoft Office Project Server 2007, type the name of the project and include any values for custom fields that are required by your organization.

In the planning stage, you devise a workable scheme to accomplish the project's goals. To do this, you identify the project's milestones, deliverables, and tasks. This plan can be your work breakdown structure (WBS). You develop and refine the schedule, and identify the resources required to implement the project.

1. **Enter tasks** — On the **View** menu, click **Gantt Chart**. In the **Task Name** field, enter tasks. Tasks can also include summary tasks, milestones, and WBS items.
2. **Outline tasks** — Create your task hierarchy, including tasks and milestones under summary tasks, which can represent phases or other work divisions. Click a task (or several tasks), and then click the **Indent** or **Outdent** button on the toolbar.
3. **Enter durations** — Click the **Duration** field for a task and enter a duration; for example, type **4d** to indicate 4 days**.** To specify a milestone without a duration, type **0d**. To indicate that a duration is an estimate, add a question mark; for example, type **6d?**.

   Note Avoid entering start and finish dates for tasks. Instead, enter a duration and let Project 2007 automatically set these dates, which might change anyway as resources are assigned to tasks.
4. **Link tasks to show relationships** — Select the tasks that you want to link, and then click the **Link Tasks** button on the toolbar. To change the default finish-to-start dependency type, double-click the line between the tasks that you want to change, and then select a task link from the **Type** list.
5. **Create deliverables** — After your project is underway, you might learn that other projects depend on your project as a deliverable. On the **Collaborate** menu, click **Manage Deliverables**. This requires Microsoft Office Project Professional 2007.

Assignments are the associations between specific tasks and the resources needed to complete them. You can assign more than one resource to a task. In addition to work resources (people), you can assign material resources (such as cement) and cost resources (such as travel) to tasks.

1. **Define the resource pool** — On the **View** menu, click **Resource Sheet**. In the **Resource Name** field, type the names of the resources you will use for this project.

   If you are using Project Professional, click **Build Team from Enterprise** on the **Tools** menu to add resources from the enterprise resource pool.

2. Assign resources to tasks

On the **View** menu, click **Gantt Chart**. Select a task to which you want to assign a resource. Click the **Assign Resources** button . In the **Assign Resources** dialog box, click the resource names, and then click **Assign**.

You can also assign resources to tasks using the Task Form. While in the Gantt Chart view, click **Split** on the **Windows** menu.

3. Enter the amount of work resources spend on tasks

When scheduling tasks, project managers sometimes prefer to enter the amount of work (or the amount of labor) needed to complete a task, rather than the duration for the task. Entering work reflects real-world scheduling.

To enter work hours for resources assigned to tasks, add the Work column to the Gantt Chart view. On the **Insert** menu, click **Column**.

4. Know your task type

As soon as you assign resources, Project 2007 determines how to schedule the task based on the task type. You might actually see durations change as resources are assigned to tasks.

How task types work

Work, duration, and units (% allocation) are determined by the formula: **Work = Duration * Units**.

In a . . .	If you revise work . . .	If you revise duration . . .	If you revise units . . .
Fixed units task	Duration changes	Work changes	Duration changes
Fixed work task	Duration changes	Units change	Duration changes
Fixed duration task	Units change	Work changes	Work changes

- To set a default task type for the entire project, click **Options** on the **Tools** menu, and then click the **Schedule** tab. In the **Default task type** box, select **Fixed Units** (the default), **Fixed Duration**, or **Fixed Work**.
- To change the task type for an individual task, select the task, and then click the **Task Information** button . Click the **Advanced** tab, and then in the **Task type** box, click the task type that you want to create.

5. **Identify factors affecting task schedules**	You can use Project 2007 to help you understand how changes to one task can affect the rest of the project and to track schedule changes. On the **View** menu, click **Show Change Highlighting**. You can view more detailed task scheduling and change information using task drivers. Select a task and then click **Task Drivers** .
	Create a baseline or an interim plan so that later you can compare your up-to-date schedule to your baseline. Saving a baseline plan enables you to identify and solve discrepancies and plan more accurately for similar future projects.
1. **Save the baseline plan**	After your project plan is solidly in place for the finish date, budget, and scope, you can submit the plan for approval. Once it has been approved, save the baseline plan. On the **Tools** menu, point to **Tracking** and then click **Set Baseline**.
2. **View baseline data in a Gantt Chart view**	On the **View** menu, click **Tracking Gantt**. In the chart area, the baseline information is shown as the lower of the two Gantt bars for each task.
3. **View baseline data in a table**	On the **View** menu, point to **Table**, and then select **Variance**. This table includes fields for baseline and variance start and finish.
	Updating the progress of your project is the only way to make sure it stays on track as work is performed. The focus at this point is on managing changes, updating the schedule, tracking progress, and communicating project information. **Note** Project 2007 tracks three sets of dates: current, baseline, and actual. When you first set the baseline, current = baseline. When a task is 100% complete, current = actual. Baseline, current, and actual values exist for the start date, finish date, duration, cost, and work.
1. **Manage changes**	Managing changes involves modifying durations, dates, dependencies, resource assignments, or tasks based on requested changes or new information. Keep the current fields up to date and compare them to the baseline.
2. **Track actual dates and durations**	It's best to decide on a single method for tracking progress. You can enter percentage complete, actual start and finish dates, actual and remaining durations, or actual and remaining work. Select the task for which you want to enter actual progress. On the **Tools** menu, point to **Tracking**, and then click **Update Tasks**. In the **Update Tasks** dialog box, enter progress data in the fields that match your tracking method.

3. Track actual hours and costs	If you want to enter actual and remaining work hours or costs, use the tracking table. On the **View** menu, point to **Table**, and then click **Tracking**. Enter progress data in the **Act. Work** or **Act. Cost** fields for the task. You can also use the tracking table to enter percent complete, actual start and finish dates, and actual and remaining duration.

Keep stakeholders and team members up-to-date on project progress by providing them with access to online or printed views and reports.

Project 2007 provides many ways to print and distribute both detailed and overview information project information quickly and efficiently.

1. Format a view for printing	On the **Format** menu, click **Text Styles** or **Bar Styles** to set up styles that will apply to multiple tasks. Or, on the **Format** menu, click **Font** or **Bar** to format individual elements for a specific task. Click **Timescale**, **Gridlines**, or **Layout** on the **Format** menu to change those aspects of the current view.
2. Print a view as a report	Set up the current view the way that you want it to look when printed. On the **File** menu, click **Print Preview** to check the view layout. To print the view, click **Print**.
3. Generate a report	On the **Report** menu, click **Visual Reports** to see your project's data in PivotTable reports in Microsoft Office Excel 2007 and PivotDiagram views in Microsoft Office Visio Professional 2007. You can also view basic reports that don't require Excel or Visio. On the **Report** menu, click **Reports**. Double-click a report category, and then double-click the predefined report. Enter any requested information. A preview of the report appears. To print the report, click **Print**.
4. Add a field (column) to a table	Click anywhere in a column to the left of where you want to insert a new column. On the **Insert** menu, click **Column**. In the **Field name** box, click the name of the field that you want to add as a new column.
5. Customize views	On the **View** menu, click **More Views**. Click **New** or **Edit**. In the **View Definition** dialog box, specify the table, group, and filter that you want to use to define the view.
6. Customize tables	On the **View** menu, point to **Table**, and then click **More Tables**. Click **New** or **Edit**. In the **Table Definition** dialog box, specify the information that you want to include in the table.
7. Customize groups	On the **Project** menu, point to **Group by**, and then click **More Groups**. Click **New** or **Edit**. In the **Group Definition** dialog box, specify how you want to group project information.
8. Customize filters	On the **Project** menu, point to **Filtered for** and then click **More Filters**. Click **New** or **Edit**. In the **Filter Definition** dialog box, specify how you want to filter project information.

		Just because your project is almost finished doesn't mean that your work is done. You still need to resolve any final project details and obtain customer acceptance of final deliverables. Conduct a "lessons learned" session, recording information about areas for improvement and best practices. Make any final updates to the project plan. Finally, archive the project plan according to your organization's guidelines.
1.	**Create a final report**	On the **Report** menu, click **Visual Reports** to see your project's data in PivotTable reports in Excel 2007 and PivotDiagram views in Visio Professional 2007. You can also view basic reports that don't require Excel or Visio. On the **Report** menu, click **Reports**. Double-click a report category, and then double-click the predefined report. Enter any requested information. A preview of the report appears. To print the report, click **Print**.
2.	**Save a project as a template**	After completing a project, you should leverage what you've learned in the project by making it a template for future projects. On the **File** menu, click **Save As**, and then in the **Save As Type** box, click **Template**.