Microsoft Office Project Professional 2007
Project Manager Quick Reference Guide

Initiate

The **Initiating** Stage proposes a project's basic idea. Project Charter; Preliminary Schedule and Work Estimates determined. Initial budget and scope of work is outlined. A Project Manager may be assigned and a Proposal or Project Plan is created.

New Project

Create a New Project (MSP):

- Start with a New Project: **\File\New\Blank Project or…**
- Start with your company Templates in: \File\New\Templates – On My Computer – Enterprise Templates tab
- Fill out project start data and custom project fields using **\Project\Project Information**
  - Set the Start Date and required project fields
  - **Save** to Project Server: **\File\Save**

Note

MSP = Microsoft Office Project Professional
PWA = Project Web Access (using IE)

Create a New Proposal (PWA):

- Go to the **Proposals and Activities** page from the **Projects** page action pane
- Select **New** and fill in Summary Information including Custom Field choices – Click **Save**
- On the Work Details page, create the high level tasks with duration estimates; links; structure; etc. and Click Save

Plan

The **Planning** Stage devises and maintains a workable scheme to accomplish the business needs the project will achieve. In the Planning Stage, determine a course of events or tasks. Create the schedule, determine risks, and assign responsibility.

Tasks

Enter or Edit Tasks:

- Add or revise tasks to meet unique needs of the project
- Estimate Duration, Set Dependencies
- Build the Work Breakdown structure by indenting and outdenting tasks
- Use **Milestones** (0d Duration) for deliverables
- Add Task Deadline Dates: **\Project\Task Information – Advanced Tab**
- Add **Risks** as appropriate: **\Collaborate\Risks**

Note

When your schedule is Published to Project Server, a Project Workspace website is created with document libraries for project documents, issues, and risks. Use the workspace during the planning stage to collaborate on project documents among team members and to review and quantify Risks associated with the project.

Resources

Build your Project Team (MSP):

- Use Team Builder to select Enterprise resources to add to your team: **\Tools\Build Team from Enterprise**
- Select the Resource from the left pane and click **Add>** to your project team
- Find the 'right' resource by using the **Avail** column and the **Graphs** button for checking when resources are available
- Select Generic resources as necessary to **Add>** to your team
- Replace Generic or local resources with Enterprise resources by selecting each and click Replace

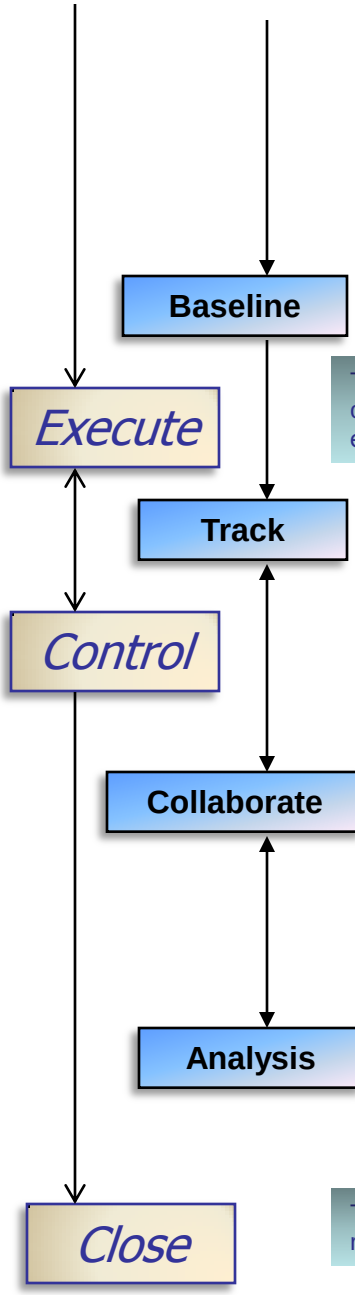
Build your Project Team (PWA):

- In the **Work Details** of a selected proposal, click **Build Team** to select Enterprise Resources to add to the project team
- Check the box to Select the Resource from the left pane and then click **Add>** to make them part of your team
- Select a resource checkbox click **View Availability** or **View Assignments** to help determine the 'right' resource
- Replace Generic or local resources with Enterprise resources by selecting each and click **Replace**
- Click **Save** and then Assign the resource by clicking in the Resource cell and selecting the resource from the pull down list

Assign

Assign Resources to Tasks (MSP):

- Use the Assign Resources tool to add, remove, replace task assignments: **\Tools\Assign Resources**
- Resources **Work** will be determined by the formula: **Work=Duration*Units**



Convert Proposal to Project:

- Select the Proposal in the **PWA Proposal and Activity** page
- Click the **Convert** button to create an **MSP** project plan

Note: When your proposal is turned into a project plan you can open it in MSP and work with it like any other project plan

Create Deliverables for PWA Access:

- Select a task to link to a Deliverable and go to: **\Collaborate\Manage Deliverables**
- Click the **Convert** button and then start MSP and open the project to make any changes or additions
- In the Deliverables Guide section, click '**Link to Selected Task**' and Name the Deliverable
- Click **Done** when finished

When Planning is Complete: Set Baseline, then Publish Assignments: **\Tools\Tracking\Set Baseline** then **\File\Publish**

The **Executing / Controlling Stage** coordinates people and other resources to carry out the plan. The deliverables in this stage focus on ongoing updates and refinements to the defined tasks. Each project team member performs defined tasks within the project scope, ensuring contribution to the project's success.

Update Project Progress:

- In **MSP**, Open the project to be updated and select **\Collaborate\Update Project Progress**
- On the **Updates** page, review submitted status and select either to **Accept** or **Reject**
- **Preview** selected updates to see what the results would be if the updates were accepted
- Use the **Accept** button when satisfied with choices to update the project plan
- Review updated results in **MSP**; make appropriate direct edits if necessary
- Update any appropriate Custom Project fields : **\Project\Project Information**
- Publish the updated information to Project Server: **\File\Publish**

Note: Team Members use **PWA** submit assignment updates by using either the My Tasks page or the Timesheet.

Documents: Upload project specific documents from the **\Go To\Documents** menu in **Project Center**

Issues: Create New Issues from the **\Go To\Issues** page in **Project Center** or the **Home Page in PWA**

- Use the form to describe, assign responsibility, determine a resolution, and adjust issue status
- Indicate affected tasks and tasks to resolve issue with **links** at the bottom of the form

Risks: Submit project risks from the **Go To\Risks** page in **Project Center** or from the **Home Page**

- Indicate the **Probability** that the risk might occur in %, and **Impact** should it occur from 1-5
- Indicate Mitigation and/or Contingency plans for dealing with the risk should it occur

Note: The Project Workspace is highly customizable by adding meeting notes, events, announcements, etc.

Project Workspace: On the **Home Page** select a project from the Project Workspace section at the bottom

- Use the project workspace as a main focal point of project status communication and collaboration

Project Center: In PWA **\Projects** page, review project status and **drill down to the task level** by clicking the project hyperlink.

- Select views from the pull down list provided in the upper right; click Group, Filter, Sort for column sub-totals

Resource Center: In PWA **\Resources** page, review resource and assignment information

- Select single or multiple resources and click **View Availability** to review graphs and tables showing project work
- To View all assignment information, click **View Assignments** on the Action pane; Select resources to see daily\weekly work

Data Analysis:

- To View Charts and Pivot Tables of all Portfolio information, Click the **Data Analysis** menu to select customized views

The **Closing Stage** involves evaluating and documenting the project's performance and realization of benefits. It also provides recommendations that might affect or assist future projects. Closing processes

Project Close:

- When all tasks are completed, finalize all project documentation and archive all project information