Microsoft Office Project Standard 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

Getting Started: Start with setting your project environment in Options : **\Tools\Options**

- On the **View** tab, click **View Project Summary** for project level rollup
- On the **Schedule** tab, choose default task type to control calculations
- Click **Set as Default** to use these settings for new projects

Fixed Units	To keep the number of assignment units constant
Fixed Duration	To keep the task duration constant
Fixed Work	To keep the amount of work constant

Create a New Project:

- Start with a New Project by using: **\File\New** choose **Blank Project or…**
- Start with Templates in**: \File\New - Templates section**
- Fill out project start data by using: **\Project\Project Information**
  - Set the **Project Start Date** and select a **Calendar** for scheduling
  - **Save** and Name your project as an .MPP file: **\File\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 and assign responsibility.

Tasks

Enter or Edit Tasks:

- Add or revise tasks to meet unique needs of the project **: \Insert\New Task**
- Build the Work Breakdown Structure (WBS) by indenting or outdenting tasks to create Summary phases details
- Enter **Duration** in days by using the Duration column or the **Task Information Box: \Project\Task Information…**
- Set Dependencies to add scheduling logic by using the Predecessor column and entering the ID of the predecessor task
- Use **Milestones** (0d Duration) for deliverables or to mark the end of a phase
- Add Task Deadline Dates: **\Project\Task Information – Advanced Tab**

Note

You can also set dependencies by select and drag on the task bar or click the predecessor task name – CTRL/click the successor and click the Link tool:

Use Planning Tools for Insight:

- View **Task Drivers** to indicate what factors contribute to task scheduling**: \Project\Task Drivers**
  - Factors for the selected task are listed in the Project Guide pane
  - Click the factor to see each type of information and to 'walk the dependency chain' showing scheduling logic
- Show **Change Highlighting** to highlight data affected by changes or additions to your plan: **\View\Show Change Highlighting**
- Use **Multiple Undo** to back out of any number of steps or to try different scheduling 'what if' scenarios: **\Edit\Undo-Redo**
- Use a **Combination view** to allow moving through your task list while viewing selected task information : **\Window\Split**
  - Use this Combination view to edit task information including dependencies Lag and Lead time, resource, duration, etc.
  - Right \Click in the gray area of the view to choose different types of information about the selected task

Resources

Build your Project Team :

- Use the **Resource Sheet View** to add resources to your project team: **\View\Resource Sheet**
- Add Work, Cost, or Material resources directly in the Resource Name column
- Use the Resource Information dialog to enter Cost, Working Time, and availability: **\Project\Resource Information**

Assign

Assign Resources to Tasks :

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

For this Task Type	Adding a **Resource**, will change…	Changing **Duration** will change..	Changing **Units** will change…
Fixed Duration	Units	Work	Work
Fixed Work	Duration	Units	Duration
Fixed Units	Duration	Work	Duration

Baseline

When Planning is Complete:

- Prepare to Track your progress and to analyze variance to plan by Setting **Baseline**: **\Tools\Tracking\Set Baseline**
  - This saves a snapshot of Start\Finish dates; Duration; Work; and Cost information for all or selected tasks
- Save your completed project with Baseline information: **\File\Save**

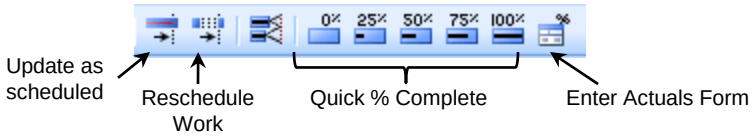
Execute

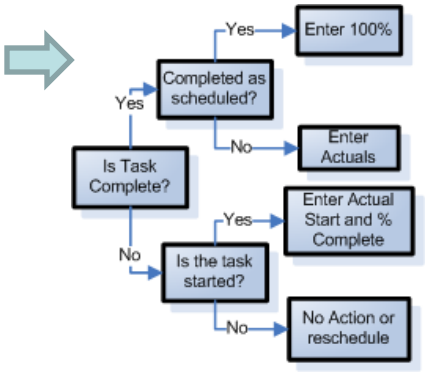
The **Executing / Controlling Stage** coordinates people and other resources to carry out the plan. The deliverables in this stage focus on ongoing updates and refinements to the defined tasks. Each project team member performs defined tasks within the project scope, ensuring contribution to the project's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

Track

Update Project Progress:

- Collect actual information about task status and enter based on the decision tree:
- Use the **Tracking Toolbar** to update task status: **\View\Toolbars\Tracking**





Control

Communicate

Using Tables and Views to communicate:

- Select Views on the View bar or go to: **\View** to choose an appropriate view type
  - Use: **\View\More Views** to select from those not on the menu
- Change the list of columns in the view: **\View\Table** ▶
  - The **Variance** Table is useful to communicate project status compared to Baseline
- Apply **Filters** to the Views to narrow the task list appropriate to the audience: **\Project\Filtered for:…**
- Apply **Groups** to organize and subtotal task data by type: **\Project\Group by:…**

Bring Views into Microsoft Office Word, Visio, or PowerPoint:

- Use the Analysis Toolbar '**Copy Picture to Office Wizard**' to export your Views: **\View\Toolbars – Analysis**

Close

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