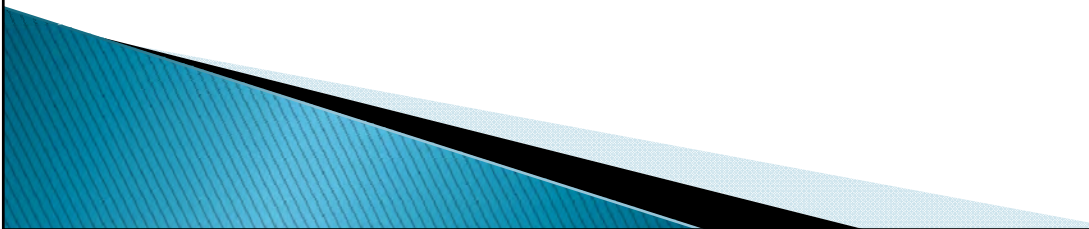


# Top 10 Tips for MS Project Users

Presented by Betty Corbin, PMP  
AUM Advanced Training Group

# What is your experience with MS Project or similar application?

1. Significant – have built many schedules with MS Project
  2. Moderate – have built a few schedules with MS Project
  3. Little – have used MS Project schedules built by others but haven't built my own
  4. None – haven't used it at all
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# What is MS Project?

- ▶ Scheduling application
- ▶ Define tasks and duration
- ▶ Assign resources
- ▶ Produces Gantt charts plus many other reports and charts

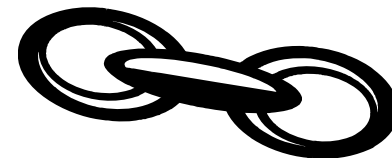
Cartoon

Gantt chart



# 1. Don't type dates, use links

- ▶ If you type start and finish dates, this sets constraints
- ▶ Therefore, if durations change, you must manually recalculate all dates
- ▶ Enter project start date and link tasks
- ▶ Use constraints only as necessary



Cartoon

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## 2. Use fixed duration tasks

- ▶ Default task type in project in Fixed Units. When you add or remove a resource, the task duration changes, which changes your finish date.
- ▶ To avoid this “date jumping”, using Fixed Duration as task type. Change in split screen or task information dialog box.
- ▶ Use Tools, Options, Schedule tab to set Fixed Duration as the default.

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### 3. Always use a project summary task

- ▶ A Project Summary task is task number 0 at top of project
- ▶ In Gantt chart it shows summary of all time.
- ▶ In other tables it shows summary data such as summary costs
- ▶ Go to Tools menu, choose Options, View tab, and check Project Summary Task checkbox.

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## 4. Hide summary tasks to get a better view of links or network diagrams

- ▶ Tools menu, Options, View tab, uncheck Show Summary Tasks
- ▶ You can see links better in Gantt chart
- ▶ You can read network diagram and calendar views better

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## 5. Use a deadline instead of FNLT constraint

- ▶ If you designate a deadline by using the Finish No Later Than constraint, longer duration for tasks causes unrealistic results in your schedule
- ▶ A deadline notifies you if you'll miss it but doesn't force a schedule change
- ▶ Use the Task information dialog box, Advanced tab to set a constraint or deadline

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## 6. Use notes to document changes

- ▶ Add notes to tasks when you make a change
- ▶ Go to the Task information dialog box, Notes tab
- ▶ To print notes, go to File, Page Setup, View tab and check Notes.



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# 7. Hyperlink to project documents

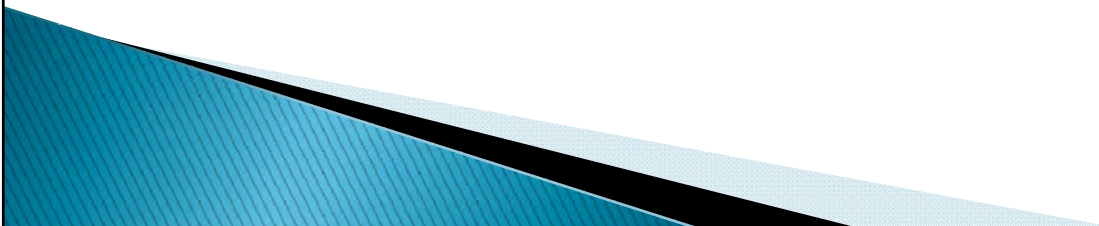
- ▶ You can hyperlink to files or folders
- ▶ Select a task or resource and choose Hyperlink from the Insert menu, or use the Insert Hyperlink button
- ▶ You can insert one hyperlink per task or resource in sheet view
- ▶ View the hyperlink table to see more details on hyperlinks

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# 8. Create and use templates

- ▶ A template provides a starting point for creating a new project
- ▶ It may contain tasks, calendars with non-working days defined, resources
- ▶ Usually doesn't contain constraints, baselines, actual data or project-specific notes



# How to create a template from a existing project

- ▶ From the Save As dialog box, choose Template as the file type
- ▶ You have an option of removing actual and baseline information
- ▶ To remove constraints, select all tasks and set the constraint to ASAP
- ▶ To use a template, do File, New

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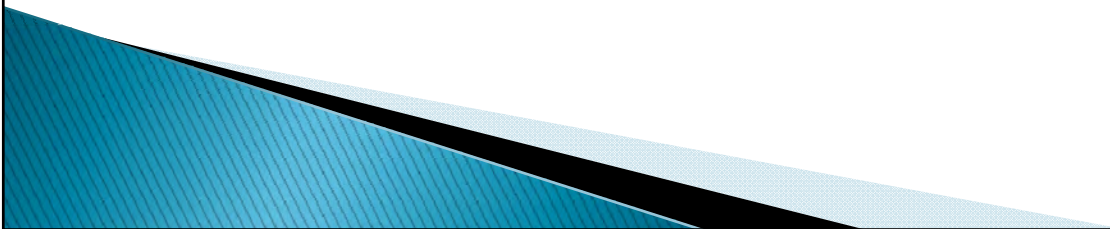
# 9. Save baseline and baseline#

- ▶ As projects progress, you may need to save multiple baselines
- ▶ Project has 11 baselines. Names are baseline, baseline1, baseline2, ...baseline10
- ▶ All built-in tables, reports and views use the one named baseline.
- ▶ Create custom views & reports, if needed, for baseline1, baseline2, etc.

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# Strategy – Baseline is always the current one

- ▶ First baseline: save baseline and baseline1
  - ▶ Second baseline: save baseline and baseline2
  - ▶ Command in 2003: Tools, Tracking, Save Baseline, select which baseline
  - ▶ Command in 2007: Tools, Tracking, Set Baseline, select which baseline
- 

# 10. Store custom tables, reports in Global.mpt

- ▶ You can build custom tables, reports and views in Project
- ▶ Use the Organizer to copy the custom items into Global.mpt. Then they'll be available to all your MS Project files.



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# A parting thought—don't learn Project by trial and error

- ▶ Buy a book and study it. Examples:
  - Dynamic Scheduling with MS Office Project 2003
  - Dynamic Scheduling with MS Office Project 2007
  - MS Project Step by Step by Microsoft
- ▶ Or, better yet, attend class at AUM ATG and let me teach you. Next class is Aug. 24–26



# Top Ten Tips for MS Project

1. Don't type dates, use links
  2. Use fixed duration tasks
  3. Always use a project summary task
  4. Hide summary tasks to get a better view of links or network diagrams
  5. Use a deadline instead of FNLT constraint
  6. Use notes to document changes
  7. Hyperlink to project documents
  8. Create and use templates
  9. Save baseline and baseline#
  10. Store custom tables, reports in Global.mpt
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# Thanks for your attention

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## Questions?

