

Contents at a Glance

<i>Introduction</i>	1
<i>Book I: Project Management</i>	7
Chapter 1: A Project Management Overview	9
Chapter 2: The Ins and Outs of Using Project.....	21
Chapter 3: Just What Tasks Should You Include?.....	35
Chapter 4: Exploring the Project Environment.....	45
Chapter 5: What's New in Project 2007.....	63
<i>Book II: Project Basics</i>	73
Chapter 1: Building a Project Plan	75
Chapter 2: Creating That First Task	85
Chapter 3: Exploring Task Views	97
Chapter 4: Working with Calendars	111
Chapter 5: Getting Help	129
<i>Book III: Getting Your Plan in Order</i>	141
Chapter 1: Organizing the Structure of a Project Plan.....	143
Chapter 2: Assigning Outline Codes to Tasks	163
Chapter 3: Using WBS Coding.....	177
Chapter 4: Linking and Consolidating Projects	191
<i>Book IV: Establishing Task Timing</i>	227
Chapter 1: Looking at Timing.....	229
Chapter 2: Defining What Drives Task Timing	237
Chapter 3: Adding Dependencies	251
Chapter 4: Working with Constraints and Deadlines	267
<i>Book V: Working with Resources and Costs</i>	275
Chapter 1: Creating Resources	277
Chapter 2: Understanding Costs	289
Chapter 3: Assigning Resources to Tasks.....	299
Chapter 4: Tallying Costs.....	321
<i>Book VI: Communicating Project Information</i>	333
Chapter 1: Working with Views.....	335
Chapter 2: Working with Tables.....	369

Chapter 3: Preparing Traditional Reports	389
Chapter 4: Creating Visual Reports	407
<i>Book VII: Resolving Problems in Your Plan</i>	<i>423</i>
Chapter 1: Working with Filters	425
Chapter 2: Solving Resource Conflicts.....	437
Chapter 3: Reviewing Timing and Costs.....	451
Chapter 4: Putting Final Changes into Place.....	463
<i>Book VIII: Tracking</i>	<i>471</i>
Chapter 1: Working with Baselines and Interim Plans.....	473
Chapter 2: Entering Actuals	487
Chapter 3: Reviewing Your Budget.....	517
<i>Book IX: Advanced Project Topics</i>	<i>527</i>
Chapter 1: Working Your Own Way	529
Chapter 2: Changing the Look of a Project.....	555
Chapter 3: Using Macros	585
Chapter 4: Importing Information into Project.....	603
Chapter 5: Exporting Project Information.....	619
<i>Book X: The Basics of Project Server</i>	<i>635</i>
Chapter 1: Understanding Project Server	637
Chapter 2: The Project Server Administrator.....	647
Chapter 3: Project Server and the Project Manager	665
Chapter 4: Project Server and the Team Member.....	683
<i>Glossary.....</i>	<i>699</i>
<i>Index</i>	<i>709</i>

Table of Contents

Introduction 1

About This Book.....	1
How This Book Is Organized.....	2
Book I: Project Management	2
Book II: Project Basics	2
Book III: Getting Your Plan in Order	2
Book IV: Establishing Task Timing	3
Book V: Working with Resources and Costs	3
Book VI: Communicating Project Information	3
Book VII: Resolving Problems in Your Plan	3
Book VIII: Tracking	4
Book IX: Advanced Project Topics	4
Book X: The Basics of Project Server	4
Glossary.....	4
Conventions Used in This Book	4
Foolish Assumptions	5
Icons Used in This Book.....	5
Where to Go from Here.....	6

Book 1: Project Management 7

Chapter 1: A Project Management Overview 9

The Life of a Project.....	9
So, just what is a project?.....	9
Taking a closer look at the project life cycle	10
Everybody Plays a Role.....	13
Stakeholders of all types	14
Getting a Few Project Management Concepts under Your Belt	14
The dreaded triple constraint	15
Keeping on track: Critical path and slack	15
Using tried-and-true methodologies	16
Resource Management Basics	18
How Project sees resources	18
What it takes to manage people	19

Chapter 2: The Ins and Outs of Using Project 21

The Basics of Computerized Project Management.....	21
Making the leap to Project	22
Connecting with your team online	23

What You Have to Put Into Project	24
Tasks and their timing	24
Lining up resources	29
Keeping a Project on Track	32
Keeping Others in the Loop	33
Chapter 3: Just What Tasks Should You Include?	35
First Things First: Define the Business Need	35
Target Practice: Project Goal Setting	36
Getting your goal straight	37
Writing a goal statement	37
Taking a Look at Your Project's Scope	38
A scope is not a goal	38
Writing a scope statement	38
Breaking Your Project into Phases	39
Thinking things through	39
It's just a phase	40
Choosing how granular to make your tasks	41
Chapter 4: Exploring the Project Environment	45
Exploring Menus and Toolbars in Project	45
Menu basics	46
Displaying and using toolbars	47
Navigating Project	48
Getting to a view	48
Scrolling to get a better view	49
Jumping to a particular point in time	51
Finding Another View	52
A popular view: Gantt Chart	52
Following the (work)flow: Network Diagram view	53
Controlling time with Calendar view	54
Changing Views	55
Modifying view panes	56
Changing tables	60
Displaying task panes	61
Displaying and Hiding Project Guide	61
Chapter 5: What's New in Project 2007	63
Exploring the Many Versions of Project	63
Getting out of Hot Water with Multiple Undo	64
Spotting Changes with Change Highlighting	66
Knowing What's Driving Your Tasks	67
Making Reports More Visual	68
A New Resource: Cost	70
Working with Budgets	71

Book 11: Project Basics 73

Chapter 1: Building a Project Plan 75

Creating That First Project.....	75
Starting from scratch	75
Getting a head start with templates.....	76
Making Global Project Settings.....	79
Entering settings.....	79
Using start and finish dates	81
Save That Project!	83
Saving a project	83
Saving in other formats	84

Chapter 2: Creating That First Task 85

Tackling Task Basics	85
Identifying what makes up a task.....	86
What task settings control	87
The Many Different Ways to Create a Task	88
Creating a task in Gantt Chart view	88
Going the Task Information dialog box route	89
Importing tasks from Outlook.....	91
Getting your tasks from Excel.....	92
Creating a task that represents another project	94

Chapter 3: Exploring Task Views 97

A View for Every Need.....	97
Finding Just the Right View for You	99
Discovering Various Task Views.....	100
What Resource Views Tell You	103
The Best Views for Tracking Progress on Your Project	106
Displaying Combination Views.....	108

Chapter 4: Working with Calendars 111

The Big 4: Base, Project, Resource, and Task Calendars	111
How calendars work	112
How does one calendar relate to another?	114
Understanding Calendar Options and Working Times	114
Setting calendar options.....	115
Making exceptions	116
Getting the Project Calendar Set Up.....	118
Letting Project Guide Make Calendar Settings For You.....	119
Making Changes to Task Calendars	121
Setting Up Resource Calendars	122
Calendars for different types of resources.....	123
Making changes to Resource calendars	123

Creating Your Own Custom Calendar Template.....	125
Sharing Calendars with Other Projects	126

Chapter 5: Getting Help129

Entering the Universe of Project Help	129
Exploring Microsoft Office Project Help.....	130
Browsing topics	131
Using the Table of Contents	132
Searching for Help	132
Going Online to Find the Answer	134
Running Diagnostics	136
Putting Project Guide to Work.....	137
Where Project Guide can lead you.....	137
Getting to work with Project Guide.....	138

Book III: Getting Your Plan in Order 141

Chapter 1: Organizing the Structure of a Project Plan143

A To-Do List . . . or a Project Schedule?.....	143
Building an outline	145
“I’ve got a little list . . .”	145
A typical project outline	146
Summary tasks are special.....	146
The most special task of them all — the project summary task.....	147
Creating Structure in the Schedule.....	149
Selecting tasks	149
Promoting and demoting tasks.....	149
Expanding and collapsing the outline	150
So, What Happens When You Reorganize the Outline?.....	152
Adding tasks.....	152
Deleting tasks.....	153
“Doing it over and over again . . .”	154
Moving tasks	155
Copying tasks.....	158

Chapter 2: Assigning Outline Codes to Tasks163

Understanding Outline Numbers	163
Letting Project Assign Outline Numbers.....	164
Understanding Outline Codes	165
Designing Your Own Outline Numbers.....	166
Selecting an outline code to define	166
Defining the code mask	168

Defining values for the lookup table169
 Entering outline codes171
 Outline Numbers and Codes and Renumbering.....172

Chapter 3: Using WBS Coding177

What’s a WBS Code?177
 Creating WBS Codes178
 Creating a WBS Chart179
 Customizing WBS Codes183
 WBS Codes and Renumbering186

Chapter 4: Linking and Consolidating Projects191

Connecting Projects with Hyperlinks191
 Creating a hyperlink.....191
 What happened? My hyperlinks don’t work193
 Editing hyperlinks194
 Moving or copying hyperlinks195
 Consolidating Projects195
 What is consolidation?195
 Do I need to use consolidation?196
 Creating subprojects.....198
 Creating a consolidated project201
 Inserted projects and the outline.....204
 Moving subprojects within a consolidated project208
 Dependencies in Consolidated Projects209
 Creating dependencies across projects209
 Changing cross-project dependencies.....212
 Saving a consolidated project.....213
 The Critical Path in a Consolidated Project215
 Sharing Resources Using a Resource Pool.....218
 Creating a resource pool218
 Sharing resources218
 Opening a project220
 Updating the resource pool221
 Viewing resource assignments when you share resources222
 Stop sharing resources224

***Book IV: Establishing Task Timing*227**

Chapter 1: Looking at Timing229

Understanding What Drives Timing229
 Timing factors229
 Your first look at your project’s timing.....231

Scheduling Backwards or Forwards	231
How scheduling works.....	232
A word of warning about backward scheduling.....	233
Surviving Schedule Shock.....	234
Chapter 2: Defining What Drives Task Timing	237
Finding Just the Right Task Type	237
The big three: Task types	238
Specifying task type	238
Task types in practice.....	239
Setting Task Duration	241
Determining the right duration	241
Entering duration	242
Working with tasks with no duration: Milestones.....	243
They keep showing up: Recurring tasks.....	244
Starting and Pausing Tasks	246
Entering the task start date	246
Taking a break: Splitting tasks	247
Understanding Effort-Driven Tasks.....	249
How effort-driven tasks work.....	249
When effort rules timing.....	249
Chapter 3: Adding Dependencies	251
Why Dependencies Are Needed	251
Understanding Dependencies	252
Identifying the players in a dependency relationship	252
When to set a dependency and when to leave well enough alone.....	252
All types of dependencies	254
More complex dependencies: Lag and lead time	256
Setting Dependencies	256
Setting up dependency links	257
Connecting to other projects with external dependencies	260
Things change: Deleting dependencies	260
Visualizing Task Dependencies	262
Chapter 4: Working with Constraints and Deadlines	267
Beginning with the Start and Finish Dates	267
Understanding How Constraints Work.....	268
Default constraints.....	268
Constraint types	269
Flexible versus inflexible constraints	269
Constraints and dependencies	270
Establishing Constraints	271
Setting a Deadline.....	272

Book V: Working with Resources and Costs275

Chapter 1: Creating Resources277

What Exactly Is a Resource?277

All Kinds of Resources278

 Understanding resources278

 Resource types: Work, Material, and Cost280

 Estimating your resource requirements282

 Committed versus proposed resources283

Creating Resources283

 Creating one resource at a time283

 Identifying resources you don't know285

 Resources that work in groups286

Chapter 2: Understanding Costs289

Accruing Costs All Over the Place289

 Tallying costs290

 The sound of costs hitting the bottom line290

Assigning Costs to Resources291

 Fixed costs you can count on291

 Paying per hour293

 Setting alternative rates294

 The cost-per-use scenario295

 Oops . . . you're into overtime!296

Chapter 3: Assigning Resources to Tasks299

Locating the Right Resource for the Job299

 Finding resources300

 Creating custom fields302

 Acquiring the right resources303

 Keeping resource workload balanced303

Your Assignment Is305

 How resources affect task timing305

 Determining Work, Material, and Cost resource
 assignment units305

 Making assignments306

 Contours set the level of work309

Making Sure of Availability311

 Setting availability311

 When resources appear and disappear312

Sharing Resources313

When Do My Resources Work?315

E-mailing an Assignment to Your Team317

Chapter 4: Tallying Costs	321
How Your Settings Affect Your Budget	321
How Project Calculates Costs	323
Letting Project calculate or doing it yourself?	323
Earned-value options	324
Examining Cost Data	325
Viewing cost information	326
Customizing cost fields	327
The Value of a Project Summary Task	329

***Book VI: Communicating Project Information*333**

Chapter 1: Working with Views	335
What's a View?	335
Selecting the Startup View	339
Making a View Handy to Display	339
Sorting Tasks in a View	341
Filtering a View	343
Applying a filter to a view	346
Creating custom filters	348
Using AutoFilters	349
Grouping Information	351
Using a predefined group	351
Grouping and usage views	352
Do-it-yourself groups	354
Using Combination Views	356
Customizing a View	360
Creating a New Combination View	361
Printing Your Project	363
Chapter 2: Working with Tables	369
Understanding Tables	369
Understanding Indicators	373
Making Changes to a Table	376
Inserting and hiding table fields	376
Changing column width	378
Changing row height	379
Customizing Tables	381
Working with the Details of Usage Views	383
Adding new fields to the Details section	385
Hiding fields in the Details section	386

Chapter 3: Preparing Traditional Reports	389
Preparing and Printing Reports	389
Preparing Big Picture Reports	392
Reporting on Task Status	394
Reporting on Costs	395
Reporting on Assignments	396
Preparing Workload Reports	398
Viewing Custom Reports	398
Adapting Reports to Suit Your Needs	401
Chapter 4: Creating Visual Reports	407
Preparing a Visual Report	407
Working with an Excel visual report	408
Working with a Visio visual report	410
Visually Reporting on Task Usage	411
Visually Reporting on Resource Usage	411
Visually Reporting on Assignment Usage	413
Preparing Visual Task Summary Reports	414
Preparing Visual Resource Summary Reports	415
Preparing Visual Assignment Summary Reports	415
Customizing Visual Reports	417

Book VII: Resolving Problems in Your Plan.....423

Chapter 1: Working with Filters	425
Filtering to Spot Resource and Schedule Problems	425
How filters work	426
Applying filters	426
Letting AutoFilters do the work	428
Creating your own filters	429
Filtering in Action	431
Discovering some very useful filters	431
Identifying the critical path	432
Working with Groups	433
Applying predefined groups	434
Coming up with your own groups	435
Chapter 2: Solving Resource Conflicts	437
Keeping Resources in Line	437
Checking resource availability	438
Picking a method to resolve the conflict	440
Finding someone to help	441
Using task drivers to resolve problems	442

Change Highlighting.....	442
Undoing again and again	444
Leveling to fix resource problems	446
Combining Solutions.....	448
Chapter 3: Reviewing Timing and Costs	451
Timing is Everything.....	451
Doing It All in Less Time.....	452
Check your dependencies	454
Rethinking your resource needs.....	454
Modifying task constraints.....	455
Delete the tasks you don't need	455
Getting It for Less.....	456
Making Your Project Timing Realistic.....	456
Reviewing the critical path	457
How many critical paths are enough?	458
Giving yourself some slack.....	458
Chapter 4: Putting Final Changes into Place	463
Getting to a Final Project Plan	463
Redefining the scope of your project	463
Product scope versus project scope	464
Selling Changes to Shareholders.....	466
Using Project's tools to close the "sale"	466
Creating a compression table	469
Book VIII: Tracking	471
Chapter 1: Working with Baselines and Interim Plans	473
Understanding Baselines and Interim Plans.....	473
Setting a Baseline.....	474
Saving an Interim Plan.....	477
Changing a Baseline or Interim Plan.....	478
Clearing Baselines and Interim Plans	480
Viewing the Critical Path.....	481
Chapter 2: Entering Actuals	487
What's Involved in Tracking?.....	487
Collecting Tracking Information.....	488
Setting Up to Track	489
Checking calculation options	490
Setting the status date	492
Selecting a tracking view	493

Ways to Record Actuals.....	496
Estimating the Percent Complete.....	497
Using start or finish dates.....	499
Recording actual and remaining durations.....	500
Recording Actual Work.....	501
Speeding up recording actuals.....	504
Tracking materials usage.....	505
Viewing Progress.....	506
Using progress lines.....	507
Using Tracking Gantt view.....	509
Using tables to review progress.....	510

Chapter 3: Reviewing Your Budget517

The Basics of Earned Value Fields.....	517
Examining Cost Variance.....	519
Physical % Complete Versus % Complete.....	522
Calculating BCWP using Physical % Complete.....	523
Using Physical % Complete selectively.....	524
Entering Physical % Complete values.....	525

Book IX: Advanced Project Topics527

Chapter 1: Working Your Own Way529

Controlling the Project Guide’s Behavior.....	529
How Many Times Can You Undo?.....	531
Switching Between Open Projects.....	532
Customizing the Way You Open.....	534
Customizing the Way You Save.....	536
Customizing the Toolbars.....	538
One line or two?.....	538
Creating your own toolbar.....	539
Modifying a toolbar.....	540
Messing with button images.....	543
Customizing the Menus.....	545
Personalizing menu behavior.....	546
Creating your own menu.....	547
Naming a new menu you created.....	549
Adding commands to a menu.....	550
Deleting commands and menus.....	550
Using the Organizer to Share Project Elements.....	551

Chapter 2: Changing the Look of a Project555

Changing Fonts.....	555
Changing fonts for selected tasks.....	556
Changing fonts for a task category.....	557

Applying Special Formatting to Gantt Chart View	558
Using the Gantt Chart Wizard	559
Changing individual taskbars	562
Changing taskbar styles for categories of tasks	563
Changing the Gantt chart layout	566
Changing Gantt chart gridlines	567
Working with the Network Diagram	569
Controlling the layout of Network Diagram view	570
Controlling the appearance of Network Diagram boxes	572
Controlling the content in Network Diagram boxes	575
Modifying Calendar View	578
Changing the time period displayed in Calendar view	579
Changing Calendar view layout	580
Formatting Calendar view entries	581
Chapter 3: Using Macros	585
Understanding Macros	585
Creating a Macro	585
Knowing your macro's steps	586
Recording the macro	586
Using a Macro	589
Running a macro from the Macros dialog box	589
Using a keyboard shortcut to run a macro	590
Using a menu command to run a macro	591
Using a toolbar button to run a macro	595
Chapter 4: Importing Information into Project	603
Using Graphic Objects in Project	603
Getting Tasks from Outlook	605
Importing Excel and Access Information into Project	607
Changing Project's security settings	607
Using an import map	608
Creating a Task List in Excel using a Project-related template	611
Importing the Excel Task List into Project	613
Importing Project Exchange Files into Project	616
Importing Text or Comma-Separated Files into Project	616
Chapter 5: Exporting Project Information	619
Copying Pictures into Office Programs	619
Saving Visual Reporting Information	625
Exporting Project Data to Excel	628
Exporting Project Data to Text Files	630

Book X: The Basics of Project Server635

Chapter 1: Understanding Project Server637

What is Project Server?637
 Do You Need Project Server?640
 Planning the Implementation of Project Server640
 Defining requirements641
 Designing the system642
 Developing an implementation strategy643
 Reviewing software needs644
 Reviewing hardware needs644
 Considering software and hardware configurations.....645

Chapter 2: The Project Server Administrator647

Understanding the Structure of the Project Server Database.....647
 Reviewing Defaults.....648
 Working with Users650
 Working with Views.....651
 Working with the Enterprise Global Template652
 Creating Enterprise Custom Fields653
 Establishing Enterprise Calendars.....654
 Working with Enterprise Resources655
 Loading Projects into the Project Server Database.....657
 Managing Timesheet and Task Settings658
 Customizing Project Web Access.....659
 Checking in Enterprise Projects and Resources661
 Managing Information in the Project Server Database662
 Backing Up and Restoring.....662
 Managing the Queue664

Chapter 3: Project Server and the Project Manager665

Logging onto Project Server665
 Working with Web-based Projects667
 Opening and closing a project670
 Managing the local cache672
 Adding Enterprise resources to a project674
 Replacing generic resources with real resources675
 Using the Resource Substitution Wizard.....676
 Assigning resources using Project Web Access676
 Creating Status Report Layouts678
 Receiving Task Updates from Team Members679

Chapter 4: Project Server and the Team Member683

Understanding the Project Web Access Home Page683
 Customizing the Home Page685

Working with Your Tasks.....	687
Recording time.....	688
Adding a task	689
Working with Your Timesheet	690
Integrating the Outlook Calendar with Project Web Access	693
Enabling integration.....	694
Sending Project Web Access assignments to Outlook.....	695
Sending Outlook information to Project Web Access.....	695
Reporting Status.....	696
<i>Glossary</i>	699
<i>Index</i>	709