

# Index

---

## *Symbols & Numerics*

---

- % Complete option for calculating earned value, 325
- 24 hours calendar template, 112, 315

## **A**

---

- Access databases
  - exporting to, 625, 627–628
  - importing from, 607–608
- account for Project Server, creating, 665–667
- accruing costs, setting up resources for time when you are, 290–291
- accuracy in schedule, checking for, 234–236
- acquiring resources, 303
- action steps that must be completed
  - before next step can occur, 41
- Active Cache Status dialog box, 673
- Actual Cost of Work Performed (ACWP), 517
- actual costs, 290
- actual duration of task, 500–501
- Actual start date setting (Task Drivers), 67, 442
- Actual Work Done and Work Remaining method
  - used for tracking Web-based projects, 668
  - used to record actual work, 658
- actual work, recording, 501–504, 658
- actuals, recording
  - actual duration of task, 500–501
  - actual work, recording, 501–504, 658
  - material resources, tracking, 505
  - overview, 496
  - percent complete of tasks, estimating, 497–499
  - remaining duration of task, 501
  - speed of, 504–505
  - Update Project dialog box used for, 504–505
    - using finish dates, 499–500
    - using start dates, 499–500
- ACWP (Actual Cost of Work Performed), 517
- adding up costs, 290
- administrative time
  - categories, setting up, 659
  - for team members, 692
- administrator role, 641–642
- Advanced tab (Task Information dialog box), 271–272
- ALAP (As Late As Possible) constraint, 233, 268, 269
- all Project files, making a table available to, 383
- All Resources filter, 345
- All Subtasks command, 152
- All Tasks filter, 344
- alternative rates, setting, 294
- Analysis toolbar, 620–621
- applying a filter to a view, 346–347
- Archive database, 648
- As Late As Possible (ALAP) constraint, 233, 268, 269
- As Soon As Possible (ASAP) constraint, 233, 268, 269
- Ask a Question box (Microsoft Office Project Help), 132–133
- Assign Resources dialog box, 307–308
- assigning costs
  - alternative rates, setting, 294
  - cost-per-use, 295–296
  - fixed costs, 279, 291–293, 456
  - hourly rate, 293
  - overtime rates, 296–297

- assigning costs (*continued*)
  - overview, 290, 291–292
  - rates per hour, 293
- assignment, grouping by, 353–354
- Assignment Information dialog box, 310
- assignment reports
  - Overallocated Resources report, 397
  - To Do List report, 397
  - Who Does What report, 397
  - Who Does What When report, 397
- assignment usage reports
  - Baseline Cost report, 414
  - Baseline report, 413, 414
  - Baseline Work report, 414
  - Budget Cost report, 414
  - Budget Work report, 414
  - Earned Value Over Time report, 414
- Assignments category (Reports dialog box), 396–397
- Assignments setting (Task Drivers), 67, 442
- associated costs, 290
- Auto Save feature, 537–538
- AutoFilter
  - activating, 428–429
  - overview, 349–351
  - using, 428–429
- AutoFilter button, 426
- automatic calculations
  - of costs, 323
  - overview, 22
- automatic creation of project summary task, 331–332
- availability
  - checking availability of resources, 438–439
  - increasing a resource's, 440
  - overview, 311
  - setting, 311–312
  - time period for, 312–313
  - variations in, 312–313

## B

---

- BAC (Budgeted at Completion), 518
- backups, 662–663
- backward scheduling, 233
- Bar Styles dialog box, 564–565, 581–582
- bars, formatting, 581–583
- Base calendar
  - Night Shift calendar template, 112
  - overview, 112
  - Standard calendar template, 112
  - 24 hours calendar template, 112, 315
- base template for Resource calendars, 315
- Baseline Cost report, 414
- Baseline report, 413, 414
- Baseline Work report, 414
- baselines
  - clearing, 480–481
  - editing, 478–480
  - overview, 32, 473–474
  - rollup settings, 478–480
  - saving, 474–475
  - setting, 474–477
  - tasks, adding, 479
- BCWP (Budgeted Cost of Work Performed), 499, 517, 523–524
- BCWS (Budgeted Cost of Work Scheduled), 517
- Biafore, Bonnie (*Visio 2007 Bible*), 410
- blank template, starting with, 75–76
- boxes, controlling appearance of, 572–575
- Budget Cost report, 414
- Budget report, 396
- budget resources, 71
- Budget Work report, 414
- Budgeted at Completion (BAC), 518
- Budgeted Cost of Work Performed (BCWP), 499, 517, 523–524
- Budgeted Cost of Work Scheduled (BCWS), 517
- business need, defining your, 35–36

buttons  
 adding, 539–540  
 grouping, 541–542  
 moving, 541

## C

Cache Settings dialog box, 672

calculations

costs, 323–325  
 earned value, 324–325  
 options for, 490–492  
 of project data, 22

Calendar setting (Project Information dialog box), 118

Calendar view

bars, formatting, 581–583  
 entries, formatting, 581–583  
 formatting, 578–583  
 layout, changing, 580–581  
 overview, 54–55  
 time period displayed in, changing, 579–580

Calendar Wizard, 119–121

calendars

Base calendar, 112  
 copying, 127–128  
 custom calendar template, creating, 125–126  
 exceptions, 114, 116–118  
 how it works, 112–113  
 naming, 128  
 options, setting, 114–116  
 overview, 111–112  
 precedence in, 114  
 Project calendar, 112  
 Project Guide used to make settings for, 119–121  
 Resource calendar, 112  
 setting, 80

sharing calendars with other projects, 126–128

Task calendar, 112

workday, setting up a standard, 113

working time, 114–115

case studies

How task drivers help pinpoint problems, 444–445

Planning for a regular meeting, 158–159

Rollup Formatting macro, 599–601

Sharing a customized table, 553–554

Shortcut to consolidate projects, 205

Taking a snapshot in time, 420–422

Timing, 234–235

Training new staff efficiently, 264–265

Viewing multiple critical paths, 483–485

Waiting till the last minute, 274

Working with budgets, 330

Cash Flow report, 395, 412

categorizing resource assignments, 303

Change Highlighting

impact of changes, showing, 467

overview, 66

resource conflicts, spotting, 442–444

changing views, 48, 55–61

Characters (unordered) code mask

element, 183–184

chart

creating, 179–183

overview, 49

chart views, 100, 336

checking out resources from Enterprise

Resource Pool, 656–657

choosing resources, 303

classifications, setting up, 659

Clean Up Cache dialog box, 673

Clear Baseline dialog box, 480

clearing interim plans, 480–481

Code field (Resource Information dialog box), 303

- code mask
  - defining, 168–169
  - overview, 183–184
- collapsing the outline, 150–152
- collecting tracking information, 488–489
- columns
  - adding, 377–378
  - displaying, 59–60
  - hiding, 60
  - selecting, 588
  - totals, printing, 367–368
- combination solutions for resource
  - conflicts, 448–449
- combination views
  - creating new, 361–363
  - displaying, 108–109, 357–358
  - one view, return to, 359
  - overview, 108–109, 356–357
  - removing bottom view, 109
  - shortcut for, 359
  - switching views, 359
- commands
  - adding, 550
  - deleting, 550–551
  - displaying, 546–547
- comma-separated value (CSV) files
  - exporting Project data, 630–633
  - importing text into Project, 616–618
- committed resources, 283
- communication, 14
- communication resource assignments, 304
- companion Web site for this book, 2
- Completed Tasks filter, 344
- Completed Tasks report, 395
- completion criteria, 39
- compression tables, 469
- Confirmed Assignments filter, 345
- Confirmed filter, 344
- conflict resolution, 287
- consolidation
  - closing a consolidated project, 213–214
  - consolidated project file, 201
  - creating a consolidated project, 201–204
  - creating subprojects, 198–200
  - critical path, 197, 215–217
  - dependencies in consolidated projects, 209–213
  - external tasks, 209–211
  - inserting a project, 202–204
  - linking a task stored in one subproject to a task stored in another subproject, 209–211
  - moving subprojects within a consolidated project, 208–209
  - outline and inserted projects, 204–207
  - overview, 195–196
  - Project Server, using, 196–197
  - of resources, 286–287
  - saving a consolidated project, 213–215
  - shortcut for, 205
  - tracking, 506
- constraint indicators, 374
- constraints
  - As Late As Possible (ALAP) constraint, 233, 268, 269
  - As Soon As Possible (ASAP) constraint, 233, 268, 269
  - default constraints, 268–269
  - dependencies, 270
  - Finish No Earlier Than constraint, 269
  - Finish No Later Than constraint, 269
  - flexible constraints, 269
  - how it works, 268–270
  - inflexible constraints, 270
  - modifying, 455
  - Must Finish On constraint, 269
  - Must Start On constraint, 269
  - overview, 267–268
  - setting, 271
  - Start No Earlier Than constraint, 269
  - Start No Later Than constraint, 269
  - types of, 269
  - Waiting till the last minute (case study), 274

- Constraints setting (Task Drivers), 67, 442
- content in boxes, controlling, 575–578
- contour indicators, 375
- Copy Picture to Office Wizard, 619–624
- copying an element between projects with Organizer, 552–553
- copying tasks, 158–161
- cost calculation options, setting, 492
- Cost Greater Than filter, 344, 345
- Cost Overbudget filter, 344, 345, 431
- Cost Performance Index (CPI), 518
- Cost reports
  - Budget report, 396
  - Cash Flow report, 395
  - Earned Value report, 396
  - Overbudget Resources report, 396
  - Overbudget Tasks report, 396
- cost resource
  - determining assignments, 305–306
  - overview, 29, 282, 289
  - Task Information dialog box, creating in, 70
- Cost tab (Resource Information dialog box), 294–295
- Cost table, 369, 370, 512–513
- Cost Variance (CV), 518, 519–522
- Cost Variance % (CV%), 518
- cost-per-use, 295–296
- costs
  - accruing costs, setting up resources for time when you are, 290–291
  - actual costs, 290
  - adding up, 290
  - alternative rates, setting, 294
  - assigning, 290, 291–297
  - associated costs, 290
  - automatic calculation of, 323
  - calculating, 323–325
  - cost-per-use, 295–296
  - customizing cost fields, 327–329
  - duration of task, lowering, 456
  - earned value, 323, 324–325
  - examining cost data, 325–329
  - filters used to display, 326
  - fixed costs, 279, 291–293, 456
  - Gantt Chart view of, 326
  - hourly rate, 293
  - lookup table used to customize cost fields, 327–329
  - manual calculation of, 324
  - Network Diagram view of, 326
  - overtime, cutting down on, 456
  - overtime rates, 296–297
  - overview, 289
  - project summary task, value of, 329–332
  - rates per hour, 293
  - reducing, 456
  - Resource Sheet view of, 326
  - resources, using cheaper, 456
  - settings affecting your budget, 321–322
  - tracking, 290–291
  - viewing cost information, 326
- Costs category (Reports dialog box), 395–396
- CPI (Cost Performance Index), 518
- Created After filter, 344
- Critical filter, 344, 431, 432
- critical path
  - in a consolidated project, 197, 215–217
  - filters used to spot, 425
  - Gantt Chart Wizard used to view, 482
  - identifying, 432
  - multiple critical paths, viewing, 483–485
  - Network Diagram view used to view, 482
  - overview, 15
  - reviewing, 457
  - slack time, 482
  - Tracking Gantt view used to view, 482
  - viewing, 481–485
- Critical Tasks report, 393
- cross-project coordination, 260
- Crosstab report, 399

- CSV (comma-separated value) files
    - exporting Project data, 630–633
    - importing text into Project, 616–618
  - Current Activities category (Reports dialog box), 394–395
  - Current Activities reports
    - Completed Tasks report, 395
    - Should Have Started Tasks report, 395
    - Slipping Tasks report, 395
    - Tasks in Progress report, 395
    - Tasks Starting Soon report, 395
    - Unstarted Tasks report, 394
  - current date, setting, 80
  - Current Date setting (Project Information dialog box), 119
  - custom calendar template, creating, 125–126
  - Custom category (Reports dialog box), 398
  - custom fields, creating, 302
  - Custom Fields dialog box, 327
  - custom filters, 348–349
  - custom groups, 354–356, 435–436
  - Custom Report dialog box, 398–400
  - custom reports
    - Crosstab report, 399
    - overview, 398–399
    - printing, 400–401
    - Resource report, 399
    - Resource Usage (Material) report, 399
    - Resource Usage (Work) report, 399
    - Task report, 399
    - viewing, 400–401
  - custom templates, 79
  - customer role, 14
  - customization
    - cost fields, 327–329
    - menus, 545–551
    - opening files, 534–536
    - Project Web Access home page, 685–686
    - saving files, 536–538
    - tables, 381–383, 553–554
    - toolbars, 538–545
    - views, 360–361
    - visual reports, 417–422
    - WBS (work breakdown structure) code, 183–185
    - cutting tasks, 157–158
  - CV (Cost Variance), 518, 519–522
  - CV% (Cost Variance %), 518
- 
- ## D
- 
- date format (Gantt Chart view), 567
  - Date Range filter, 344, 345
  - deadlines
    - described, 267
    - in Gantt Chart view, 273
    - setting, 272–273
  - default constraints, 268–269
  - default file format, 538
  - default folder for saving files, 536–538
  - default percentage, assigning resources at a, 307
  - default task type, 238, 240
  - default view, selecting, 339
  - defining a custom outline code, 166
  - Definition tab (Task Report dialog box), 402
  - deleted files, linking to, 193
  - deleting an element between projects with Organizer, 552–553
  - deleting tasks, 153–154
  - deliverables, 39, 680
  - demoting tasks, 149
  - dependencies
    - changing cross-project dependencies, 212–213
    - constraints, 270
    - creating dependencies across projects, 209–211
    - cross-project coordination, 260
    - deleting, 260–261

dependency links, 252  
 external dependencies, 260  
 finish-to-finish dependency, 256  
 finish-to-start dependency, 254, 257–259  
 hyperlinked tasks, 260  
 lack of available resources as reason for, 251  
 lag time, 256  
 lead time, 256  
 links, 252  
 modifying, 454  
 nature of task as reason for, 251  
 overview, 26–28, 209  
 predecessor, 252  
 predecessor-successor pair, 252  
 reasons for, 251  
 to save time checking your, 454  
 setting, 256–261  
 start-to-finish dependency, 255  
 start-to-start dependency, 255  
 successor, 252  
 training new staff efficiently (case study), 264–265  
 types of, 254–256  
 viewing, 262–265  
 when to set, 252–253  
 Dependency relationships setting (Task Drivers), 67, 442  
 description of an indicator, displaying, 374  
 Descriptive Network Diagram view, 102  
 designing outline codes, 166–172  
 designing the system to be used, 642–643  
 detail in tasks, 41–43  
 Details section  
   adding new fields to, 385–386  
   hiding fields in, 386–387  
 Details tab (Task Report dialog box), 403  
 determining your goal, 37  
 displaying views, 339–341  
 Draft database, 647  
 dragging tasks, 156

duration of task  
   inflating, 460  
   lowering, 456  
   overview, 24, 26  
   resources, 280–281  
 Dummies Web site, 2

---

## **E**

---

EAC (Estimate at Completion), 518  
 earned value  
   ACWP (Actual Cost of Work Performed), 517  
   BAC (Budgeted at Completion), 518  
   BCWP (Budgeted Cost of Work Performed), 517  
   BCWS (Budgeted Cost of Work Schedule), 517  
   calculating, 324–325  
   costs, 323, 324–325  
   CPI (Cost Performance Index), 518  
   CV (Cost Variance), 518, 519–522  
   CV% (Cost Variance %), 518  
   EAC (Estimate at Completion), 518  
   overview, 517–519  
   % Complete option for calculating, 325  
   Physical % Complete, 518, 519, 522–525  
   Physical % Complete option for calculating, 325  
   for resources, 520–521  
   SPI (Schedule Performance Index), 518  
   SV (Schedule Variance), 518  
   SV% (Schedule Variance %), 518, 519  
   for tasks, 519–520  
   TCPI (To Complete Performance Index), 518, 519  
   VAC (Variance at Completion), 518  
 Earned Value Over Time report, 414  
 Earned Value report, 396  
 Edit Hyperlink dialog box, 194  
 Edit Lookup Table dialog box, 169–170

- Edit menu, 46
  - editing sections on Project Web Access
    - home page, 685
  - effort-driven tasks
    - how it works, 249
    - overview, 249
    - settings for, changing, 249–250
  - e-mail
    - assignments to your team, 317–319
    - sending project as e-mail attachment, 318–319
  - ending the project and debriefing phase, 12
  - entering outline codes, 171–172
  - Enterprise calendars, 654–655
  - Enterprise custom fields, 653–654
  - Enterprise Global template, 638, 652
  - Enterprise Project Management (EPM)
    - Solution, 23, 63–64
  - Enterprise Resource Pool
    - checking out resources from, 656–657
    - creating, 655–656
    - overview, 655
    - Project Server administration, 655–657
  - enterprise resources
    - adding, 674–675
    - overview, 313
  - entries, formatting, 581–583
  - Entry table, 369, 370
  - EPM (Enterprise Project Management)
    - Solution, 23, 63–64
  - Estimate at Completion (EAC), 518
  - examining cost data, 325–329
  - Excel
    - exporting to, 628–630
    - importing from, 92–94, 607–615
    - Task List, 92–94, 611–613
    - visual reports, 408–410
  - Excel PivotTable format, 84
  - Excel 2007 Bible* (Walkenbach), 408
  - Excel Workbook format, 84
  - exceptions, 114, 116–118
  - executive role, 642
  - existing group, modifying an, 436
  - existing table, creating new table by
    - making changes to copy of an, 381–383
  - existing template, starting with, 76–79
  - existing view, creating a new view by
    - changing an, 360–361
  - expanding the outline, 150–152
  - expectations, 39–40
  - Export Wizard
    - Excel, exporting Project data to, 628–630
    - text files, exporting Project data to, 630–633
  - exporting
    - to Access databases, 625, 627–628
    - to comma-separated value (CSV) files, 630–633
    - to Excel, 628–630
    - images, 619–625
    - OLAP (On Line Analytical Processing)
      - cubes, 625–627
    - overview, 619
    - pictures without fields, 624–625
    - to text files, 630–633
    - using Copy Picture to Office Wizard, 619–624
  - Extensible Markup Language (XML), 84
  - external dependencies, 260
  - external tasks, 209–211
- 
- ## F
- 
- file formats, 536–538
  - File menu
    - displaying more files at the bottom of, 534–536
    - overview, 46
  - file size of graphic objects, 603
  - Fill handle used to copy recurring tasks, 160–161
  - Filter Definition dialog box, 349

## filtering views

- applying a filter, 346–347
- creating custom filters, 348–349
- task filters, 343–346
- using AutoFilters, 349–351

## filters

- All Resources filter, 345
- All Tasks filter, 344
- applying, 426–428
- applying a filter to a view, 346–347
- AutoFilter, 349–351, 428–429
- Completed Tasks filter, 344
- Confirmed Assignments filter, 345
- Confirmed filter, 344
- Cost Greater Than filter, 344, 345
- Cost Overbudget filter, 344, 345, 431
- Created After filter, 344
- creating, 429–430
- Critical filter, 344, 431, 432
- critical path, identifying, 425, 432
- custom filters, 348–349
- Date Range filter, 344, 345
- displaying, 427
- Group filter, 345
- highlighting filter, 347
- how it works, 426
- In Progress Assignments filter, 346
- In Progress Tasks filter, 344
- Incomplete Tasks filter, 344, 431
- Late/Overbudget Tasks Assigned To filter, 344
- Late/Overbudget Tasks filter, 431
- Linked Fields filter, 344, 346
- Milestones filter, 344
- new filter, creating a, 349
- Overallocated Resources filter, 346, 431
- overallocated resources, filters used to spot, 425
- overview, 343, 425–426
- resource filters, 345–346
- Resource Group filter, 344

## Resource Range filter, 346

- Resources with Attachments filter, 346
  - Resources/Assignments filter, 346
  - Should Start By filter, 344, 346, 431
  - Should Start/Finish By filter, 344, 346
  - Slipped/Late Progress filter, 344, 346, 431
  - Slipping Assignments filter, 346, 431
  - Slipping Tasks filter, 344
  - Summary Tasks filter, 344
  - task filters, 344–345
  - Task Range filter, 345
  - Tasks with Attachments filter, 345
  - Tasks with Deadlines filter, 345
  - Tasks with Estimated Durations filter, 345
  - Tasks with Fixed Dates filter, 345
  - Tasks/Assignments with Overtime filter, 345
  - Top Level Tasks filter, 345
  - turning off, 347
  - turning on, 426
  - Unconfirmed Assignments filter, 346
  - Unconfirmed filter, 345
  - Unstarted Assignments filter, 346
  - Unstarted Tasks filter, 345
  - Update Needed filter, 345, 431
  - used to display costs, 326
  - used to show impact of changes, 467
  - using, 431–432
  - Using Resource filter, 345
  - Using Resource in Date Range filter, 345
  - Work Complete filter, 346
  - Work Incomplete filter, 346, 431
  - Work Overbudget filter, 345, 346, 431
- final project plan
- Change Highlighting used to show impact of changes, 467
  - compression tables, 469
  - filters used to show impact of changes, 467
  - management, presenting changes to, 466–469

- final project plan (*continued*)
  - overview, 463
  - product scope, redefining, 464–465
  - quality, sacrificing, 465
  - reports used to show impact of changes, 467
  - scope of project, redefining, 463–465
  - What If scenarios, trying out, 467
- finalizing the plan phase, 11
- finding resources, 300–301
- finish date
  - entering, 246–247
  - overview, 81–82
  - recording actuals, 499–500
  - setting, 80
  - timing, 232
- Finish date setting (Project Information dialog box), 119, 232
- Finish No Earlier Than constraint, 269
- Finish No Later Than constraint, 269
- finish-to-finish dependency, 256
- finish-to-start dependency
  - overview, 254
  - setting up, 257–259
- fiscal periods, establishing, 658
- fixed costs
  - lowering, 456
  - overview, 279, 291–293
- fixed duration task type, 238, 240
- fixed units task type, 238, 240
- fixed work task type, 238, 240
- flexible constraints, 269
- fonts
  - formatting, 555–558
  - overview, 555
  - selected tasks, changing fonts for, 556–557
  - task category, changing fonts for, 557–558
- Footer tab (Page Setup dialog box), 366
- footers, printing, 366
- form views, 336

- Format Bar dialog box, 562, 563
- Format menu, 47
- formats, saving a project in other, 84
- formatting
  - Calendar view, 578–583
- fonts, changing, 555–558
  - for Gantt Chart view, 558–568
  - for Network Diagram view, 569–578
- forward scheduling, 232

## G

---

- Gantt chart, 16–17
- Gantt Chart view
  - of costs, 326
  - creating a task in, 88–89
  - date format, 567
  - deadlines in, 273
  - dependencies, deleting, 260
  - dependencies, viewing, 262–265
  - Gantt Chart Wizard used to format, 559–561
  - gridlines, modifying, 567–568
  - layout of Gantt Chart, modifying, 566–567
  - links, 567
  - overview, 52–53
  - split tasks, 567
  - task categories, changing taskbar styles for, 563–566
  - taskbars, modifying individual, 562
- Gantt Chart Wizard
  - used to format Gantt Chart view, 559–561
  - used to view critical path, 482
- Gantt, Henry (mechanical engineer), 17, 53
- generic resources
  - overview, 285–286
  - replaced with real resources, 675
- global project settings
  - calendar, 80
  - current date, 80

- entering settings, 79–81
- finish date, 80, 81–82
- priority of project, 80
- schedule from start or finish of project, 80
- start date, 79, 81–82
- status date, 80
- Global template, 552–553
- Go To Selected Task tool, 52
- goal of project
  - determining your goal, 37
  - goal statement, writing a, 37–38
  - identifying, 145
  - overview, 36
  - scope of project compared to, 38
- goal statement, writing a, 37–38
- graph views, 100, 336
- graphic objects
  - file size, 603
  - overview, 603
  - steps for inserting, 604–605
  - using, 603–605
- Gridlines dialog box, 567–568
- gridlines, modifying, 567–568
- Group Definition dialog box, 355
- Group filter, 345
- groups
  - by assignment in usage view, 353–354
  - of boxes, controlling appearance of, 574–575
  - creating, 435–436
  - custom groups, 354–356, 435–436
  - existing group, modifying an, 436
  - overview, 351, 433
  - predefined groups, 351–352, 434
  - resources that work in, 286–287
  - tasks, 351–356
  - turning off, 352
  - usage views, 352–354
- guidelines for resources, 282–283

---

## H

---

- hardware configurations for Project Server, 645–646
- hardware requirements for Project Server, 644–645
- Header tab (Page Setup dialog box), 366
- headers, printing, 366
- height of rows, changing, 379–380
- Help feature
  - Microsoft Office Diagnostics, 136–137
  - Microsoft Office Online, 134–136
  - Microsoft Office Project Help, 130–134
  - overview, 129–130
- Help menu, 47
- hiding columns, 376
- highlighting filter, 347
- histogram, 19
- horizontal scroll bar
  - location in pane you want to view, 50
  - one page at a time, moving, 51
  - overview, 49
  - small increments, moving in, 51
- hourly rate, 293
- Hours of Work Done per Time Period
  - method
    - used for tracking Web-based projects, 668
    - used to record actual work, 658
- How task drivers help pinpoint problems (case study), 444–445
- human resources, 19–20
- hyperlinks
  - copying, 195
  - creating, 191–192
  - deleted files, linking to, 193
  - editing, 194
  - location, linking to file in new, 193
  - moving, 195
  - overview, 191
  - removing, 192
  - tasks as, 94–96, 260
  - troubleshooting, 193

## I

---

- identifying unknown resources, 285–286
- identifying what makes up a task, 86–87
- ignoring resource conflicts, 440
- images
  - exporting, 619–625
  - modifying button for, 543–545
- implementation of Project Server, 640–646
- import map, 608–611
- importing
  - from Access, 607–608
  - comma-separated value (CSV) files, 616–618
  - from Excel, 607–615
  - import map, using, 608–611
  - from Outlook, 605–607
  - Project Exchange (MPX) files, 616
  - security settings for, 607–608
  - Task List in Excel, 611–615
  - text (tab-delimited) files, 616–618
- import-mapping, 91
- Incomplete Tasks filter, 344, 431
- indicators
  - constraint indicators, 374
  - contour indicators, 375
  - description of an indicator, displaying, 374
  - miscellaneous indicators, 375
  - overview, 373–375
  - task type indicators, 375
  - workgroup indicators, 375
- individual box, controlling appearance of, 573–574
- individual resources, tracking workload of, 304
- inflexible constraints, 270
- Insert button (Insert Project dialog box), 203
- Insert menu, 47
- Insert Object dialog box, 604

- Insert Project dialog box
  - Insert button, 203
  - Link to Project check box, 203
- interim plans
  - clearing, 480–481
  - editing, 478–480
  - overview, 474
  - rollup settings, 478–480
  - saving, 477–478
- Internet resources
  - companion site for this book, 2
  - Microsoft, 33
  - WBS Chart Pro, 180
- issues, 680

## K

---

- key dates, 39
- keyboard shortcut used to run macros, 587, 590–591

## L

---

- lack of available resources as reason for dependencies, 251
- lag time, 256
- Late/Overbudget Tasks Assigned To filter, 344
- Late/Overbudget Tasks filter, 431
- launch phase, 12
- Layout dialog box
  - Calendar view, 580–581
  - Changing Gantt chart layout, 566–567
  - Network Diagram view, 570–571
- layouts
  - Calendar view, 580–581
  - Gantt Chart view, 566–567
  - Network Diagram view, 570–572
  - Status Reports, 678–679
- lead time, 256

Legend tab (Page Setup dialog box), 366–367

legends, printing, 366–367

level of work, contours used to set, 309–311

Leveling delay setting (Task Drivers), 67, 442

Leveling Gantt view  
overview, 106–107  
used to display changes made by resource leveling, 448

life cycle of project  
ending the project and debriefing phase, 12  
finalizing the plan phase, 11  
launch phase, 12  
planning phase, 10  
tracking and reporting progress phase, 12

lightweight projects, 670

Link to Project check box (Insert Project dialog box), 203

Linked Fields filter, 344, 346

linking a task stored in one subproject to a task stored in another subproject, 209–211

linking projects. *See* hyperlinks

loading projects into database, 657–658

local cache, managing, 672–674

location in pane you want to view, 50

location, linking to file in new, 193

logging on  
Project Server, 665–667, 684  
Project Web Access, 683–684

logic diagram, 17

lookup table  
cost fields, customizing, 327–329  
defining values for, 169–171

Lowercase Letters (ordered) code mask element, 183

---

## M

---

macros  
columns, selecting, 588  
creating, 585–588  
keyboard shortcut used to run, 587, 590–591  
Macros dialog box, running a macro from, 589–590  
menu command used to run, 591–595  
naming, 586–587  
overview, 585  
recording, 586–588  
Rollup Formatting macro (case study), 599–601  
rows, selecting, 588  
steps for, 586  
storing, 588  
for timing, 233  
toolbar used to run, 595–598  
using, 589–598

management, presenting changes to, 466–469

managing information in Project Server database, 662

manual calculation of costs, 324

margins for printing, 364

Margins tab (Page Setup dialog box), 364

material resource  
assigning, 305–306  
overview, 29, 70, 282  
tracking, 505

menu command used to run macros, 591–595

menus  
commands, adding, 550  
commands, deleting, 550–551  
commands, displaying, 546–547  
creating, 547–548  
customization, 545–551  
deleting, 550–551

- menus (*continued*)
    - displaying, 546–547
    - Edit menu, 46
    - File menu, 46
    - Format menu, 47
    - Help menu, 47
    - Insert menu, 47
    - naming, 549
    - options for, 546
    - overview, 46–47
    - Project menu, 47
    - Report menu, 47
    - Tools menu, 47
    - View menu, 46
    - Window menu, 47
  - merge key, 94
  - Microsoft Office Diagnostics
    - overview, 136–137
    - steps for, 137
  - Microsoft Office Online, 134–136
  - Microsoft Office Project Help
    - Ask a Question box, 132–133
    - displaying, 130
    - overview, 130
    - searches in, 132–134
    - subtopics, browsing, 131–132
    - Table of Contents, 132
    - topics, browsing, 131–132
  - Microsoft Office SharePoint Server (MOSS), 670
  - Microsoft Web site, 33
  - milestones
    - defined, 26
    - identifying in tasks, 41
    - marking key achievements, 27
    - tasks with no duration, 243–244
  - Milestones filter, 344
  - Milestones report, 393
  - miscellaneous indicators, 375
  - mission statement, measuring your project goal against the company's, 36
  - More Views dialog box, 99
  - MPX (Project Exchange) files, 616
  - Multiple Baselines Gantt view, 107–108
  - multiple critical paths
    - overview, 458
    - viewing, 483–485
  - Multiple Undo
    - overview, 64–65
    - used to resolve resource conflicts, 444–446
  - Must Finish On constraint, 269
  - Must Start On constraint, 269
  - My Tasks page, 687
  - My Timesheets page, 688, 691
- 
- ### N
- 
- naming
    - calendars, 128
    - macros, 586–587
    - menus, 549
    - resources, 301
    - slack in schedule, 461
  - nature of task as reason for dependencies, 251
  - network diagram, 17–18
  - Network Diagram view
    - boxes, controlling appearance of, 572–575
    - content in boxes, controlling, 575–578
    - of costs, 326
    - dependencies, viewing, 262–263
    - formatting, 569–578
    - group of boxes, controlling appearance of, 574–575
    - individual box, controlling appearance of, 573–574
    - layout of, 570–572
    - overview, 53–54, 569–570
    - used to view critical path, 482

- new features
  - budget resources, 71
  - Change Highlighting, 66
  - Cost resources, 70
  - Multiple Undo, 64–65
  - Task Drivers, 67–68
  - Visual Reports, 68–69
- new filter, creating a, 349
- new project
  - blank template, starting with, 75–76
  - existing template, starting with, 76–79
  - methods for creating, 75–79
- New Toolbar dialog box, 539–540
- Night Shift calendar template, 112, 315
- Numbers (ordered) code mask element, 183

---

## O

- OLAP (On Line Analytical Processing)
  - cubes, 625–627
- one page at a time, moving, 51
- one resource at a time, creating, 283–285
- online communication, 23
- Open dialog box, 670–671
- Open Resource Pool Information dialog box, 220
- opening files, 534–536
- Organizer
  - copying an element between projects with, 551–553
  - deleting an element between projects with, 552–553
  - displaying, 551
  - Global template, 552–553
  - overview, 551
  - renaming an element between projects with, 552–553
- organizing tasks, 25–26

- outline
  - building an, 145
  - collapsing, 150–152
  - demoting tasks, 149
  - expanding, 150–152
  - inserted projects, 204–207
  - levels of detail in, 146
  - moving tasks, 155–158
  - promoting tasks, 149
  - selecting tasks, 149
- outline codes
  - code mask, defining, 168–169
  - defining a custom outline code, 166
  - designing, 166–172
  - entering, 171–172
  - lookup table, defining values for, 169–171
  - overview, 165–166
  - renumbering, 172, 174–175
  - selecting an outline code to define, 166–167
- outline numbers
  - assigned by Project, 164–165
  - displaying, 165
  - overview, 163–164
  - renumbering, 172–175
  - Outlook, importing from, 91–92, 605–607
- Outlook integration with Project Web Access
  - enabling, 694
  - overview, 693
  - sending Outlook information to Project Web Access, 695
  - sending Project Web Access assignments to Outlook, 695
  - team members, 693–695
- overallocated resources
  - filters used to spot, 425
  - overview, 300
- Overallocated Resources filter, 346, 431
- Overallocated Resources report, 397
- overbooking resources, 304

- Overbudget Resources report, 396
- Overbudget Tasks report, 396
- overtime, cutting down on, 456
- overtime rates, 296–297
- Overview category (Reports dialog box), 392–393
- Overview reports
  - Critical Tasks report, 393
  - Milestones report, 393
  - Project Summary report, 393
  - Top Level Tasks report, 393
  - Working Days report, 393

## **p**

---

- Page Setup dialog box
  - Footer tab, 366
  - Header tab, 366
  - Legend tab, 366–367
  - Margins tab, 364
  - overview, 364, 390–391
  - Page tab, 364
  - View tab, 367–368
- Page tab (Page Setup dialog box), 364
- pages for printing, 364
- pagination and views, 365
- pagination, printing, 365
- panes
  - modifying, 56–60
  - overview, 49
  - resizing, 56
  - timescale, customizing, 56–59
- parameters of project
  - completion criteria, 39
  - deliverables, 39
  - expectations, 39–40
  - key dates, 39
  - overview, 39–40
  - risks, potential, 40
- pastings tasks, 158
- percent complete of tasks
  - estimating, 497–499
  - physical percent complete compared, 499
- % Complete option for calculating earned value, 325
- percent completion changes, 492
- Percent of Work Complete method
  - used for tracking Web-based projects, 668
  - used to record actual work, 658
- PERT (Program Evaluation and Review Technique) chart, 17, 54
- phases of project, 10–13, 40
- physical percent complete
  - BCWP calculated using, 523–524
  - option for calculating earned value, 325
  - overview, 522–523
  - percent complete of tasks compared to, 499
  - selective use of, 524–525
  - values for, entering, 525
- pictures without fields, exporting, 624–625
- PivotDiagrams, 410–411
- PivotTable reports, 68
- planning for a regular meeting (case study), 158–159
- planning for implementation of Project Server
  - administrator role, 641–642
  - designing the system to be used, 642–643
  - executive role, 642
  - hardware configurations, 645–646
  - hardware requirements, 644–645
  - overview, 640–641
- planning phase, 10
- Planning Wizard dialog box, 208
- portfolio manager role, 642
- precedence in calendars, 114
- predecessor, 252
- predecessor-successor pair, 252
- predefined groups
  - applying, 434
  - overview, 351–352

- previewing printing, 363
- Print dialog box, 363–364, 392
- printing
  - column totals, 367–368
  - custom reports, 400–401
  - footers, 366
  - headers, 366
  - legends, 366–367
  - margins for, 364
  - overview, 363–368
  - pages for, 364
  - pagination, 365
  - previewing, 363
  - row totals, 367–368
  - views, 363–368
- priority of project, setting, 80
- priority of task, setting, 15, 243
- Priority setting (Project Information dialog box), 119
- product scope
  - described, 464
  - redefining, 464–465
  - scope of project compared to, 464–465
- Program Evaluation and Review Technique (PERT) chart, 17, 54
- Progress Assignments filter, 346
- progress lines
  - adding, 507–508
  - deleting, 508
  - displaying, 508
  - progress, viewing, 507–508
- Progress Tasks filter, 344
- progress views
  - overview, 506
  - using Cost table, 512–513
  - using progress lines, 507–508
  - using tables, 510–515
  - using Tracking Gantt view, 509–510
  - using Variance table, 510–511
  - using Work table, 513–515
- Project calendar
  - overview, 112
  - setting up, 118–119
- Project Exchange (MPX) files, 616
- Project Guide
  - calendar settings, 119–121
  - displaying, 62, 529–530
  - hiding, 62, 138
  - overview, 61, 137–138
  - showing, 138
  - turning off, 530
  - using, 138–139
- Project Guide toolbar
  - displaying, 56
  - hiding, 56
- Project Information dialog box
  - Calendar setting, 118
  - Current Date setting, 119
  - Finish Date setting, 119, 232
  - overview, 79–81, 199
  - Priority setting, 119
  - Schedule From setting, 119, 232
  - Start Date setting, 119, 232
  - Status Date setting, 119
- project management, 10
- project manager role, 13–14, 642
- Project menu, 47
- Project Plan template, 92–94
- Project Professional, 638
- Project Professional 2007, 64
- project schedule. *See* schedule
- Project Server
  - account for, creating, 665–667
  - Actual Work Done and Work Remaining
    - method to record actual work, 658
  - administrator role, 641–642
  - Archive database, 648
  - designing the system to be used, 642–643
  - Draft database, 647
  - Enterprise Global template, 638
  - executive role, 642

- Project Server (*continued*)
  - hardware configurations, 645–646
  - hardware requirements, 644–645
  - Hours of Work Done per Time Period
    - method to record actual work, 658
  - implementation of, 640–646
  - implementation strategy for, designing, 643–644
  - logging on, 665–667, 684
  - overview, 637–640
  - Percent of Work Complete method to record actual work, 658
  - planning for implementation of, 640–646
  - portfolio manager role, 642
  - project manager role, 642
  - Published database, 648
  - recording actual work, 658
  - Reports database, 648
  - requirements, defining, 641–642
  - resource manager role, 642
  - resources, creating, 285
  - security, 639–640, 649
  - software configurations, 645–646
  - software requirements, 644
  - team member role, 642
  - Web-based projects, 667–678
  - who should use, 640
- Project Server administration
  - administrative time categories, setting up, 659
  - backups, 662–663
  - checking in Enterprise projects and resources, 661
  - classifications, setting up, 659
  - default settings, 659
  - defaults, reviewing, 648–650
  - Enterprise calendars, 654–655
  - Enterprise custom fields, 653–654
  - Enterprise Global template, 652
  - Enterprise Resource Pool, 655–657
  - fiscal periods, establishing, 658
  - loading projects into database, 657–658
  - managing information in Project Server database, 662
  - overview, 647
  - Project Web Access, customizing, 659–660
  - queued jobs, managing, 664
  - reporting periods, creating, 658
  - restoring database, 662–663
  - structure of database, 647–648
  - task settings, 658–659
  - tasks, locking down, 659
  - timesheet settings, 658–659
  - users, working with, 650
  - views, 651–652
- project sponsor role, 14
- Project Standard, 64
- Project Summary report, 393
- project summary task
  - advantages of, 331
  - automatic creation of, 331–332
  - overview, 147–149
  - value of, 329–332
- Project 2000–2003 format, 84
- Project Web Access
  - customizing, 659–660
  - logging on, 683–684
  - overview, 23
  - reassigning work, 690
- Status Reports layouts, creating, 678–679
- task updates from team members, receiving, 679–681
- used to assign resources, 676–678
- Project Web Access Activity Plans, 670
- Project Web Access home page
  - adding sections, 685
  - customizing, 685–686
  - editing sections, 685
  - overview, 683–684
  - removing sections, 685
  - reorganizing elements on, 686

team members, 683–687  
 Web parts, adding, 686–687  
 Project Web Access Proposals, 670  
 projects  
   elements of, 9–10  
   phases of, 10–13  
 promoting tasks, 149  
 proposed resources, 283  
 Published database, 648  
 publishing Web-based projects, 669

---

## Q

quality, sacrificing, 465  
 queued jobs, managing, 664

---

## R

range for task duration, 242  
 rates for resources, 30  
 rates per hour, 293  
 realistic timing for project, 456–461  
 reassigning work, 690  
 recording actuals  
   actual duration of task, 500–501  
   actual work, recording, 501–504, 658  
   material resources, tracking, 505  
   overview, 496  
   percent complete of tasks, estimating, 497–499  
   remaining duration of task, 501  
   speed of, 504–505  
 Update Project dialog box used for, 504–505  
   using finish dates, 499–500  
   using start dates, 499–500  
 recording macros, 586–588  
 recurring tasks  
   copying, 159–161  
   creating, 244–245

Fill handle used to copy recurring tasks, 160–161  
   resources assigned to, 245  
   task duration, 244–245  
 reducing costs, 456  
 rejoining tasks, 248  
 Relationship Diagram view, 102–103  
 remaining duration of task, 501  
 removing bottom view, 109  
 renaming an element between projects  
   with Organizer, 552–553  
 renumbering  
   outline codes, 172, 174–175  
   outline numbers, 172–174  
   tasks, 172–175  
   WBS (work breakdown structure) code, 186–189  
 Report menu, 47  
 reporting periods, creating, 658  
 reports. *See* traditional reports  
 Reports database, 648  
 Reports dialog box  
   Assignments category, 396–397  
   Costs category, 395–396  
   Current Activities category, 394–395  
   Custom category, 398  
   described, 390  
   Overview category, 392–393  
   Workload category, 398  
 reports, visual  
   on assignment usage, 414  
   Baseline Cost report, 414  
   Baseline report, 413, 414  
   Baseline Work report, 414  
   Budget Cost report, 414  
   Budget Work report, 414  
   Cash Flow report, 411, 412  
   Critical Tasks Status report, 414–415  
   customization of, 417–422  
   Earned Value Over Time report, 414  
   Excel visual reports, 408–410

- reports, visual (*continued*)
  - overview, 407
  - PivotDiagrams, 410–411
  - preparing, 407–408
  - preparing visual assignment summary reports, 415
  - preparing visual resource summary reports, 415
  - preparing visual task summary reports, 414–415
  - Resource Availability report, 412
  - Resource Cost Summary report, 412
  - Resource Remaining Work report, 415, 416
  - Resource Status report, 415, 416
    - on resource usage, 411–413
  - Resource Work Availability report, 412, 413
  - Resource Work Summary report, 412
  - Task Status report, 415, 417
    - on task usage, 411
  - template, creating a new, 417–420
  - timephased data in, 419
  - Visio visual reports, 410–411
- represents another project, creating a task that, 94–96
- requirements for resources, estimating your, 282–283
- Resource Allocation view, 103, 104
- resource assignments
  - acquiring resources, 303
  - Assign Resources dialog box used for creating, 307–308
  - availability, 311–313
  - categorizing, 303
  - choosing resources, 303
  - communication, 304
  - cost resource, assigning, 305–306
  - creating, 306–309
  - custom fields, creating, 302
  - default percentage, assigning resources at a, 307
  - e-mailing an assignment to your team, 317–319
  - finding resources, 300–301
  - individual resources, tracking workload of, 304
  - material resource, assigning, 305–306
  - name of resource, changing, 301
  - overallocation, 300, 311
  - overbooking, 304
  - overview, 299
  - parameters for, 306
  - Resource column used for creating, 306–307
  - Task Information dialog box used for creating, 308–309
  - task timing, resources affecting, 305
  - work contours, 309–311
  - work resource, assigning, 305–306
  - workgroup inefficiencies, 305
  - workload, balancing, 303–304
- Resource Availability report, 412
- Resource calendars
  - base template for, 315
  - editing, 316–317
  - how it works, 315
  - ignoring, 231
  - modifying, 123–125
  - Night Shift template, 315
  - overview, 112
  - setting up, 122–125
  - Standard template, 315
  - 24 Hours template, 315
  - types of resources, calendars for different, 123
- Resource column used for creating resource assignments, 306–307

- resource conflicts
  - availability of resources, 438–439, 440
  - Change Highlighting feature used to spot, 442–444
  - combination solutions for, 448–449
  - help, finding, 441–442
  - ignoring, 440
  - method for resolving, choosing a, 440
  - Multiple Undo used to resolve, 444–446
  - overview, 11, 437–438
  - Resource Graph view used to spot, 438–439
  - resource leveling used to resolve, 446–448
  - Resource Usage view used to spot, 438–439
  - task drivers used to resolve, 442
  - tasks, removing a resource from some, 440
  - work contours, modifying, 441–442
  - workday, allowing resource to have a longer, 440
- Resource Cost Summary report, 412
- resource filters
  - All Resources filter, 345
  - Confirmed Assignments filter, 345
  - Cost Greater Than filter, 345
  - Cost Overbudget filter, 345
  - Date Range filter, 345
  - Group filter, 345
  - In Progress Assignments filter, 346
  - Linked Fields filter, 346
  - Overallocated Resources filter, 346
  - Resource Range filter, 346
  - Resources with Attachments filter, 346
  - Resources/Assignments filter, 346
  - Should Start By filter, 346
  - Should Start/Finish By filter, 346
  - Slipped/Late Progress filter, 346
  - Slipping Assignments filter, 346
  - Unconfirmed Assignments filter, 346
  - Unstarted Assignments filter, 346
  - Work Complete filter, 346
  - Work Incomplete filter, 346
  - Work Overbudget filter, 346
- Resource Form view, 103, 105
- resource graph, 19
- Resource Graph view
  - overview, 103, 104
  - used to spot resource conflicts, 438–439
- Resource Group filter, 344
- Resource Information dialog box
  - Code field, 303
  - Cost tab, 294–295
  - overview, 284
- resource leveling
  - disadvantages of, 449
  - how it works, 446
  - Leveling Gantt view used to display changes made by, 448
  - overview, 15, 236
  - safest setting for, 449
  - steps for, 447–448
  - used to resolve resource conflicts, 446–448
- resource management
  - as advantage of using Project 2007, 22
  - overview, 14, 18–20, 287
- resource manager role, 642
- Resource Notes area, 303
- resource pool
  - creating, 218
  - disabling, 224–225
  - opening a project, 220–221
  - overview, 218, 313
  - sharing resources, 218–220
  - updating, 221–222
  - viewing resource assignments when you share resources, 222–224
- Resource Range filter, 346
- Resource Remaining Work report, 415, 416
- Resource report, 399

- Resource Sheet view
  - of costs, 326
  - overview, 103, 105
- Resource Status report, 415, 416
- resource status used to update task status, 490–491
- Resource Substitution Wizard, 676
- resource usage chart, 19–20
- Resource Usage (Material) report, 399
- Resource Usage reports
  - Cash Flow report, 412
  - Resource Availability report, 412
  - Resource Cost Summary report, 412
  - Resource Work Availability report, 412, 413
  - Resource Work Summary report, 412
- Resource Usage view
  - overview, 383–384
  - Tracking table, 503–504
  - used to spot resource conflicts, 438–439
- Resource Usage (Work) report, 399
- resource views
  - overview, 103
  - Resource Allocation view, 103, 104
  - Resource Form view, 103, 105
  - Resource Graph view, 103, 104
  - Resource Sheet view, 103, 105
- Resource Work Availability report, 412, 413
- Resource Work Summary report, 412
- resource-dependent timing, 454–455
- resources
  - assigned to recurring tasks, 245
  - committed resources, 283
  - conflict resolution, 287
  - consolidated resources, 286–287
  - cost of, 278
  - cost resources, 29, 282, 289
  - creating, 283–288
  - duration of task, 280–281
  - earned value, 520–521
  - generic resources, 285–286
  - groups, resources that work in, 286–287
  - guidelines for, 282–283
  - identifying unknown resources, 285–286
  - information on, using previously acquired, 282
  - material resources, 29, 282
  - one resource at a time, creating, 283–285
  - overallocated resources, 300
  - overview, 29–31, 277–280
  - Project Server, resources created in, 285
  - proposed resources, 283
  - rates for, 30
  - requirements for, estimating your, 282–283
  - schedule conflicts, 30
  - sharing, 313–315
  - skill levels of, 282
  - using cheaper, 456
  - work resources, 29, 281–282
- Resources with Attachments filter, 346
- Resources/Assignments filter, 346
- restoring database, 662–663
- risks, 40, 680
- roles
  - customer, 14
  - overview, 13
  - project manager, 13–14
  - project sponsor, 14
  - stakeholders, 14
- Rollup Formatting macro (case study), 599–601
- rollup settings
  - baselines, 478–480
  - interim plans, 478–480
- row totals, printing, 367–368
- rows, selecting, 588

**S**

- 
- safest setting for resource leveling, 449
  - saving a project
    - consolidated projects, 213–215
    - in Excel PivotTable format, 84
    - in Excel Workbook format, 84
    - formats, saving a project in other, 84
    - in Project 2000–2003 format, 84
    - steps for, 83
    - in Template format, 84
    - in text format, 84
    - to a workspace, 84
    - in XML format, 84
  - schedule
    - accuracy in schedule, checking for, 234–236
    - adding tasks, 152–153
    - backward scheduling, 233
    - building slack in schedule, 460
    - collapsing the outline, 150–152
    - conflicts, 30
    - copying tasks, 158–161
    - cutting tasks, 157–158
    - deleting tasks, 153–154
    - demoting tasks, 149
    - dragging tasks, 156
    - expanding the outline, 150–152
    - forward scheduling, 232
    - goal of project, identifying, 145
    - how scheduling works, 232
    - moving tasks, 155–158
    - outline, building an, 145
    - outline, levels of detail in, 146
    - overview, 14, 143–144
    - pasting tasks, 158
    - progress lines, adding, 507–508
    - project summary task, 147–149
    - promoting tasks, 149
    - recurring tasks, 154–155, 159–161
    - reorganizing, 152–161
    - scope of project, identifying, 145
    - selecting tasks, 149
    - setting, 80
    - structure in, creating, 149–152
    - summary tasks, 146–147
    - to-do list compared to, 143–144
  - Schedule from setting (Project Information dialog box), 119, 232
  - schedule note, 318
  - Schedule Performance Index (SPI), 518
  - Schedule table, 369, 371
  - Schedule Variance (SV), 518
  - Schedule Variance % (SV%), 518, 519
  - scope of project
    - goal for project compared, 38
    - identifying, 145
    - overview, 38
    - product scope compared to, 464–465
    - redefining, 463–465
    - scope statement, writing a, 38–39
  - searches in Microsoft Office Project Help, 132–134
  - sections added to Project Web Access home page, 685
  - security
    - importing, security settings for, 607–608
    - Project Server, 639–640, 649
  - selecting an outline code to define, 166–167
  - selecting tasks, 149
  - Send Schedule Note dialog box, 318
  - Set Baseline dialog box, 475
  - Set 0% – 100% Complete option (Update Project dialog box), 505
  - Set 0% or 100% Complete Only option (Update Project dialog box), 505
  - Share Resources dialog box, 219, 224–225
  - sharer files, 313
  - sharing a customized table (case study), 553–554

- sharing calendars with other projects, 126–128
- sharing resources, 313–315
- sheet, 49
- sheet views, 336–337
- shortcut menus, 337
- shortcut to consolidate projects (case study), 205
- shortcuts
  - combination views, 359
  - consolidation, 205
- Should Have Started Tasks report, 395
- Should Start By filter, 344, 346, 431
- Should Start/Finish By filter, 344, 346
- skill levels of resources, 282
- slack in schedule
  - building, 460
  - critical path, 482
  - duration of task, inflating, 460
  - name for, 461
  - overview, 16, 426, 458–459
  - slack tasks, building, 460
- Slipped/Late Progress filter, 344, 346, 431
- Slipping Assignments filter, 346, 431
- Slipping Tasks filter, 344
- Slipping Tasks report, 395
- small increments, moving in, 51
- software configurations for Project Server, 645–646
- software requirements for Project Server, 644
- Sort dialog box, 343
- Sort tab (Task Report dialog box), 403
- sorting tasks in a view, 341–343
- speed of recording actuals, 504–505
- SPI (Schedule Performance Index), 518
- split tasks
  - Gantt Chart view, 567
  - overview, 247–248
- stakeholder role, 14
- Standard calendar template, 112
- standard template (Resource calendars), 315
- start date
  - adjusting task, 491–492
  - entering, 246–247
  - overview, 81–82, 232
  - recording actuals, 499–500
  - setting, 79
- Start date setting (Project Information dialog box), 119, 232
- Start No Earlier Than constraint, 269
- Start No Later Than constraint, 269
- start of phase, indicating, 41
- start-to-finish dependency, 255
- start-to-start dependency, 255
- startup view, selecting a, 339
- status date, setting, 80, 492–493
- Status Date setting (Project Information dialog box), 119
- status reports
  - layouts for, creating, 678–679
  - team members, 696–697
- steps for macros, 586
- storing macros, 588
- structure of database, 647–648
- subprojects. *See also* consolidation
  - creating, 198–200
  - described, 195
  - linking a task stored in one subproject to a task stored in another subproject, 209–211
  - moving subprojects within a consolidated project, 208–209
- subtasks
  - displaying, 151
  - hiding, 151
  - moving, 155
  - overview, 25
- subtopics, browsing, 131–132
- successor, 252
- Summary table, 372, 373

summary tasks  
 displaying subtasks, 151  
 duration of, 331  
 hiding subtasks, 151  
 moving, 155  
 overview, 25, 146–147  
 project summary task, 147–149  
 Summary Tasks filter, 344  
 Summary tasks setting (Task Drivers), 67, 442  
 SV (Schedule Variance), 518  
 SV% (Schedule Variance %), 518, 519  
 switching between open projects, 532–534  
 switching tables, 372  
 switching views, 359

## T

tab-delimited files  
 exporting Project data to, 630–633  
 importing, 616–618  
 Table of Contents for Microsoft Office  
 Project Help, 132  
 table views, 336–337  
 tables  
 adding columns, 377–378  
 all Project files, making a table available to, 383  
 Cost table, 369, 370, 512–513  
 customization, 381–383, 553–554  
 displaying, 60  
 editing, 376–380  
 Entry table, 369, 370  
 existing table, creating new table by  
 making changes to copy of an, 381–383  
 height of rows, changing, 379–380  
 hiding columns, 376  
 indicators, 373–375  
 overview, 60, 369–373  
 progress, viewing, 510–515  
 Schedule table, 369, 371

Summary table, 372, 373  
 switching, 372  
 Tracking table, 369, 371, 497, 502, 503–504  
 usage views, 383–387  
 Variance table, 372, 510–511  
 viewing columns, 377  
 width of column, changing, 378–379  
 Work table, 513–515  
 Taking a snapshot in time (case study), 420–422  
 Task calendars  
 modifying, 121–122  
 overview, 112  
 task categories  
 fonts for, 557–558  
 taskbar styles for, 563–566  
 task creation  
 Excel, importing tasks from, 92–94  
 Gantt Chart view, creating a task in, 88–89  
 hyperlinked tasks, 94–96  
 identifying what makes up a task, 86–87  
 merge key, 94  
 methods for, 88–96  
 Outlook, importing tasks from, 91–92  
 overview, 85–86  
 representing another project, creating a task for, 94–96  
 settings for tasks, 87–88  
 Task Information dialog box used to create a task, 89–90  
 task date, 51  
 Task Dependency dialog box, 212–213  
 Task Details view, 100, 101  
 Task Drivers  
 Actual start date setting, 67, 442  
 Assignments setting, 67, 442  
 Constraints setting, 67, 442  
 Dependency relationships setting, 67, 442  
 displaying, 67  
 information about, displaying, 442  
 Leveling delay setting, 67, 442

- Task Drivers (*continued*)
  - overview, 67–68
  - Summary tasks setting, 67, 442
  - used to resolve resource conflicts, 442
- task duration
  - determining, 241–242
  - entering, 242–243
  - milestones, 243–244
  - overview, 241
  - range for, 242
  - recurring tasks, 244–245
- Task Entry view, 100–101
- task filters
  - All Tasks filter, 344
  - Completed Tasks filter, 344
  - Confirmed filter, 344
  - Cost Greater Than filter, 344
  - Cost Overbudget filter, 344
  - Created After filter, 344
  - Critical filter, 344
  - Date Range filter, 344
  - In Progress Tasks filter, 344
  - Incomplete Tasks filter, 344
  - Late/Overbudget Tasks Assigned To filter, 344
  - Linked Fields filter, 344
  - Milestones filter, 344
  - Resource Group filter, 344
  - Should Start By filter, 344
  - Should Start/Finish By filter, 344
  - Slipped/Late Progress filter, 344
  - Slipping Tasks filter, 344
  - Summary Tasks filter, 344
  - Task Range filter, 345
  - Tasks with Attachments filter, 345
  - Tasks with Deadlines filter, 345
  - Tasks with Estimated Durations filter, 345
  - Tasks with Fixed Dates filter, 345
  - Tasks/Assignments with Overtime filter, 345
  - Top Level Tasks filter, 345
  - Unconfirmed filter, 345
  - Unstarted Tasks filter, 345
  - Update Needed filter, 345
  - Using Resource filter, 345
  - Using Resource in Date Range filter, 345
  - Work Overbudget filter, 345
- task ID, 51
- Task Information dialog box
  - Advanced tab, 271–272
  - overview, 204, 239, 605
  - used for creating resource assignments, 308–309
  - used to create a task, 89–90
- Task List (Excel)
  - created using special template, 611–613
  - importing, 611–615
- task panes, 61
- Task Range filter, 345
- Task report, 399
- Task Report dialog box
  - Definition tab, 402
  - Details tab, 403
  - Sort tab, 403
- Task Sheet view used for tracking, 493–494
- Task Status report, 415, 417
- task status used to update resource status, 490–491
- task timing, resources affecting, 305
- task type indicators, 375
- task types
  - default task type, 238, 240
  - fixed duration task type, 238, 240
  - fixed units task type, 238, 240
  - fixed work task type, 238, 240
  - overview, 237–238
  - setting, 238–239
  - using, 239–240
- task updates from team members, receiving, 679–681
- Task Usage view
  - overview, 102, 383–384
  - Tracking table, 502
  - used for tracking, 493–495

- task usage, visual reports on, 411
- task views
  - Descriptive Network Diagram view, 102
  - overview, 100
  - Relationship Diagram view, 102–103
  - Task Details view, 100, 101
  - Task Entry view, 100–101
  - Task Usage view, 102
- taskbars, modifying individual, 562
- tasks. *See also* task creation; timing
  - adding, 152–153, 479, 689–690
  - constraints, 29
  - contour, setting, 310
  - copying tasks, 158–161
  - cutting tasks, 157–158
  - deleting tasks, 153–154
  - deleting unnecessary, 455–456
  - demoting tasks, 149
  - dependencies, 26–28
  - described, 24
  - detail in, 41–43
  - dragging tasks, 156
  - duration of, 24, 26
  - effort-driven tasks, 249–250
  - Fill handle used to copy recurring tasks, 160–161
  - finding, 51–52
  - finish date, entering, 246–247
  - fonts for, 556–557
  - locking down, 659
  - milestones, 26, 27, 41
  - moving tasks, 155–158
  - organizing, 25–26
  - pasting tasks, 158
  - project summary task, 147–149
  - promoting tasks, 149
  - recurring tasks, 154–155, 159–161
  - rejoining tasks, 248
  - removing a resource from some, 440
  - renumbering, 172–175
  - selecting tasks, 149
  - setting priorities on, 15
  - settings, 658–659
  - splitting tasks, 247–248
  - start date, entering, 246–247
  - start of phase, indicating, 41
  - starting, 246
  - subtasks, 25
  - summary task, 25, 146–147
  - team members, 687–690
- Tasks in Progress report, 395
- Tasks Starting Soon report, 395
- Tasks with Attachments filter, 345
- Tasks with Deadlines filter, 345
- Tasks with Estimated Durations filter, 345
- Tasks with Fixed Dates filter, 345
- Tasks/Assignments with Overtime filter, 345
- TCPI (To Complete Performance Index), 518, 519
- team member role, 642
- team members
  - administrative time, 692
  - My Tasks page, 687
  - My Timesheets page, 688, 691
  - Outlook integration with Project Web Access, 693–695
  - Project Web Access home page, 683–687
  - reassigning work, 690
  - status reports, 696–697
  - tasks, adding, 689–690
  - tasks, working with, 687–690
  - time, recording, 688–689
  - timesheets, 690–692
- Template format, 84
- templates
  - blank template, starting with, 75–76
  - creating, 417–420
  - custom calendar template, creating, 125–126

## templates (*continued*)

- custom templates, 79, 125–126
- Excel task list moved into Project, template for, 92–94
- existing template, starting with, 76–79
- opening, 77–79
- overview, 22
- Project Plan template, 92–94
- text (tab-delimited) files
  - exporting Project data to, 630–633
  - importing, 616–618
- time period displayed in Calendar view, changing, 579–580
- time period for availability, 312–313
- time, recording, 688–689
- timephased data, 68, 419
- timephased fields, 495
- timescale
  - customizing, 56–59
  - overview, 50
- Timescale dialog box, 58
- timesheets
  - settings, 658–659
  - team members, 690–692
- timing. *See also* task duration
  - accuracy in schedule, checking for, 234–236
  - ALAP (as late as possible) constraint, 233
  - ASAP (as soon as possible) constraint, 233
  - backward scheduling, 233
  - case study, 234–235
  - constraints, modifying task, 455
  - critical path, reviewing, 457
  - dependencies, to save time checking your, 454
  - factors in, 229–230
  - finish date, 232
  - forward scheduling, 232
  - how scheduling works, 232
  - less time, completing project in, 452–456

- macros for, 233
- multiple critical paths, 458
- overview, 229–231, 451–452
- priority, setting task, 243
- realistic timing for project, 456–461
- Resource calendars, ignoring, 231
- slack in schedule, 458–461
- start date, 232
- tasks, deleting unnecessary, 455–456
- To Complete Performance Index (TCPI), 518, 519
- To Do List report, 397
- toolbars
  - buttons, adding, 539–540
  - buttons, grouping, 541–542
  - buttons, moving, 541
  - creating, 539–540
  - customization, 538–545
  - displaying, 47, 538–539
  - hiding, 47
  - images, modifying button, 543–545
  - modifying, 540–543
  - overview, 47–48
  - used to run macros, 595–598
- Tools menu, 47
- Top Level Tasks filter, 345
- Top Level Tasks report, 393
- topics in Microsoft Office Project Help, browsing, 131–132
- tracking
  - calculation options, checking, 490–492
  - collecting tracking information, 488–489
  - consolidated projects, 506
  - cost calculation options, setting, 492
  - costs, 290–291
  - overview, 32–33, 487–488
  - percent completion changes, 492
  - progress, viewing, 506–515
  - recording actuals, 496–505
  - resource status used to update task status, 490–491

- setting up for, 489–496
  - start date, adjusting task, 491–492
  - status date, setting, 492–493
  - Task Sheet view used for, 493–494
  - task status used to update resource status, 490–491
  - Task Usage view used for, 493–495
  - timephased fields, 495
  - view, selecting a tracking, 493–496
  - Web-based projects, 668
  - tracking and reporting progress phase, 12
  - Tracking Gantt view
    - overview, 107
    - progress, viewing, 509–510
    - used to view critical path, 482
  - Tracking table
    - displaying, 497
    - Resource Usage view, 503–504
    - tables, 369, 371
    - Task Usage view, 502
  - tracking views
    - Leveling Gantt view, 106–107
    - Multiple Baselines Gantt view, 107–108
    - overview, 106
    - Tracking Gantt view, 107, 482, 509–510
  - traditional reports
    - Budget report, 396
    - Cash Flow report, 395
    - Completed Tasks report, 395
    - creating, 403–405
    - Critical Tasks report, 393
    - custom reports, 398–401
    - Earned Value report, 396
    - Milestones report, 393
    - modifying, 401–405
    - Overallocated Resources report, 397
    - Overbudget Resources report, 396
    - Overbudget Tasks report, 396
    - overview, 22, 33–34, 389
    - PivotTable reports, 68
    - printing, 389–392
    - Project Summary report, 393
    - Should Have Started Tasks report, 395
    - Slipping Tasks report, 395
    - Tasks in Progress report, 395
    - Tasks Starting Soon report, 395
    - To Do List report, 397
    - Top Level Tasks report, 393
    - Unstarted Tasks report, 394
    - Who Does What report, 397
    - Who Does What When report, 397
    - Working Days report, 393
  - training new staff efficiently (case study), 264–265
  - triple constraint, 15
  - 24 hours calendar template, 112, 315
- 
- U
- Unconfirmed Assignments filter, 346
  - Unconfirmed filter, 345
  - undo feature, 531–532
  - Unstarted Assignments filter, 346
  - Unstarted Tasks filter, 345
  - Unstarted Tasks report, 394
  - Update Needed filter, 345, 431
  - Update Project dialog box, 504–505
    - overview, 504–505
    - Set 0% or 100% Complete Only option, 505
    - Set 0% – 100% Complete option, 505
  - Update Resource Pool command, 221
  - Uppercase Letters (ordered) code mask element, 183
  - usage views
    - Details section, adding new fields to, 385–386
    - Details section, hiding fields in, 386–387
    - grouping, 352–354
    - overview, 383–385
    - Resource Usage view, 383–384
    - tables, 383–387
    - Task Usage view, 383–384

users, working with, 650  
Using Resource filter, 345  
Using Resource in Date Range filter, 345

## V

VAC (Variance at Completion), 518

Variance table

- progress, viewing, 510–511
- tables, 372

variations in availability, 312–313

versions of Project, 64, 538

vertical scroll bar, 49

View Bar

- displaying, 49, 56, 340
- displaying views not shown on, 49
- hiding, 56

View Definition dialog box, 362

View menu, 46

View tab (Page Setup dialog box), 367–368

Viewing multiple critical paths (case studies), 483–485

views

- Calendar view, 54–55
- changing, 48, 55–61
- chart views, 49, 100, 336
- choosing, 99–100
- columns, displaying, 59–60
- combination views, 100, 108–109, 337, 356–359, 361–363
- customizing, 360–361
- default view, selecting, 339
- displaying, 339–341
- existing view, creating a new view by
  - changing an, 360–361
- filtering, 343–350
- finding, 52–55
- form views, 336
- Gantt Chart view, 52–53
- graph views, 100, 336
- grouping tasks, 351–356

Network Diagram view, 53–54

overview, 22, 97–99, 335–338

pagination, 365

panes, 49

panes, modifying, 56–60

printing, 363–368

Project Server administration, 651–652

removing, 341

resource views, 103–105

selecting a tracking, 493–496

sheet views, 49, 336–337

for shortcut menus, 337

sorting tasks in a view, 341–343

startup view, selecting a, 339

table views, 336–337

task views, 100–103

tracking views, 106–108

types of, 100, 336

views of progress. *See* progress views

Visio

- visual reports, 410–411

- WBS chart, creating a, 179–183

*Visio 2007 Bible* (Biafore), 410

visual assignment summary reports, 415

visual reports

- on assignment usage, 414

- Baseline Cost report, 414

- Baseline report, 413, 414

- Baseline Work report, 414

- Budget Cost report, 414

- Budget Work report, 414

- Cash Flow report, 411, 412

- Critical Tasks Status report, 414–415

- customization of, 417–422

- Earned Value Over Time report, 414

- Excel visual reports, 408–410

- overview, 407

- PivotDiagrams, 410–411

- preparing, 407–408

- preparing visual assignment summary reports, 415

preparing visual resource summary reports, 415  
 preparing visual task summary reports, 414–415  
 Resource Availability report, 412  
 Resource Cost Summary report, 412  
 Resource Remaining Work report, 415, 416  
 Resource Status report, 415, 416  
   on resource usage, 411–413  
 Resource Work Availability report, 412, 413  
 Resource Work Summary report, 412  
 Task Status report, 415, 417  
   on task usage, 411  
 template, creating a new, 417–420  
 timephased data in, 419  
 Visio visual reports, 410–411  
 visual resource summary reports, 415  
 visual task summary reports, 414–415

---

## W

---

Waiting till the last minute (case study), 274  
 Walkenbach, John (*Excel 2007 Bible*), 408  
 WBS Chart Pro, 179–180  
 WBS Code Definition dialog box, 184–185  
 WBS Renumber dialog box, 189  
 WBS (work breakdown structure) code  
   Characters (unordered) code mask element, 183–184  
   chart, creating a WBS, 179–183  
   code mask, 183–184  
   creating, 178–179  
   customization, 183–185  
   Lowercase Letters (ordered) code mask element, 183  
   Numbers (ordered) code mask element, 183  
   overview, 177–178  
   renumbering, 186–189  
   Uppercase Letters (ordered) code mask element, 183  
 Web parts, adding, 686–687  
 Web sites  
   companion site for this book, 2  
   Microsoft, 33  
   WBS Chart Pro, 180  
 Web-based projects  
   Actual Work Done and Work Remaining method of tracking, 668  
   closing, 672  
   Enterprise resources, adding, 674–675  
   generic resources replaced with real resources, 675  
   Hours of Work Done per Time Period method of tracking, 668  
   local cache, managing, 672–674  
   opening, 670–672  
   overview, 667–670  
   Percent of Work Complete method of tracking, 668  
   Project Web Access used to assign resources, 676–678  
   publishing, 669  
   Resource Substitution Wizard, using, 676  
   saving, 669  
   tracking methods for, 668  
 What If scenarios, trying out, 22, 467  
 Who Does What report, 397  
 Who Does What When report, 397  
 who should use Project Server, 640  
 width of column, changing, 378–379  
 Window menu, 47  
 Windows SharePoint Services, 680  
 work breakdown structure code. *See* WBS code  
 Work Complete filter, 346  
 work contours  
   modifying, 441–442  
   resource assignments, 309–311

Work Incomplete filter, 346, 431  
Work Overbudget filter, 345, 346, 431  
work resources  
    assigning, 305–306  
    overview, 29, 70, 281–282  
Work table, 513–515  
workday  
    allowing resource to have a longer, 440  
    setting up a standard, 113  
workgroup indicators, 375  
workgroup inefficiencies and resource  
    assignments, 305  
Working Days report, 393  
working time  
    changing, 116–118  
    overview, 114–115  
Working with budgets (case study), 330

workload, balancing, 303–304  
Workload category (Reports dialog box),  
    398  
workspace, 84

---

**X**

XML (Extensible Markup Language), 84  
XML format, 84

---

**Z**

zooming in, 60  
zooming out, 60