



# **Microsoft Project 2010 – Project Essentials Planning, Communicating, Tracking**

Robert Happy, PMP, MCT, MCTS  
Project Management Practice Inc.  
[www.pm-practice.com](http://www.pm-practice.com)

# What is Project Management Practice Inc.?

***"Our mission is to make you more productive with portfolio and project management by providing real world, value added meaningful training, consulting and practical products."***

## **PM Training – Simply The Best**

Project Management Concepts  
Microsoft Project, Server and SharePoint  
General Management and Leadership

## **PM Consulting – Right The First Time**

PPM Process & EPM Systems  
PMO Set-up and Support  
Coaching & Scheduling

## **PM Marketplace – On Demand Tools & Training**

Books and Whitepapers  
Video Based eLearning  
Software, Templates, Tools



# Who Is Robert, PMP, MCT, MCTS?

rhappy@pm-practice.com

- 20 yrs. portfolio and project management consulting and training experience

- Published book, articles, training programs on PM and Microsoft Project

- Worked with 100's of organizations and 1000's of individuals to optimize PM

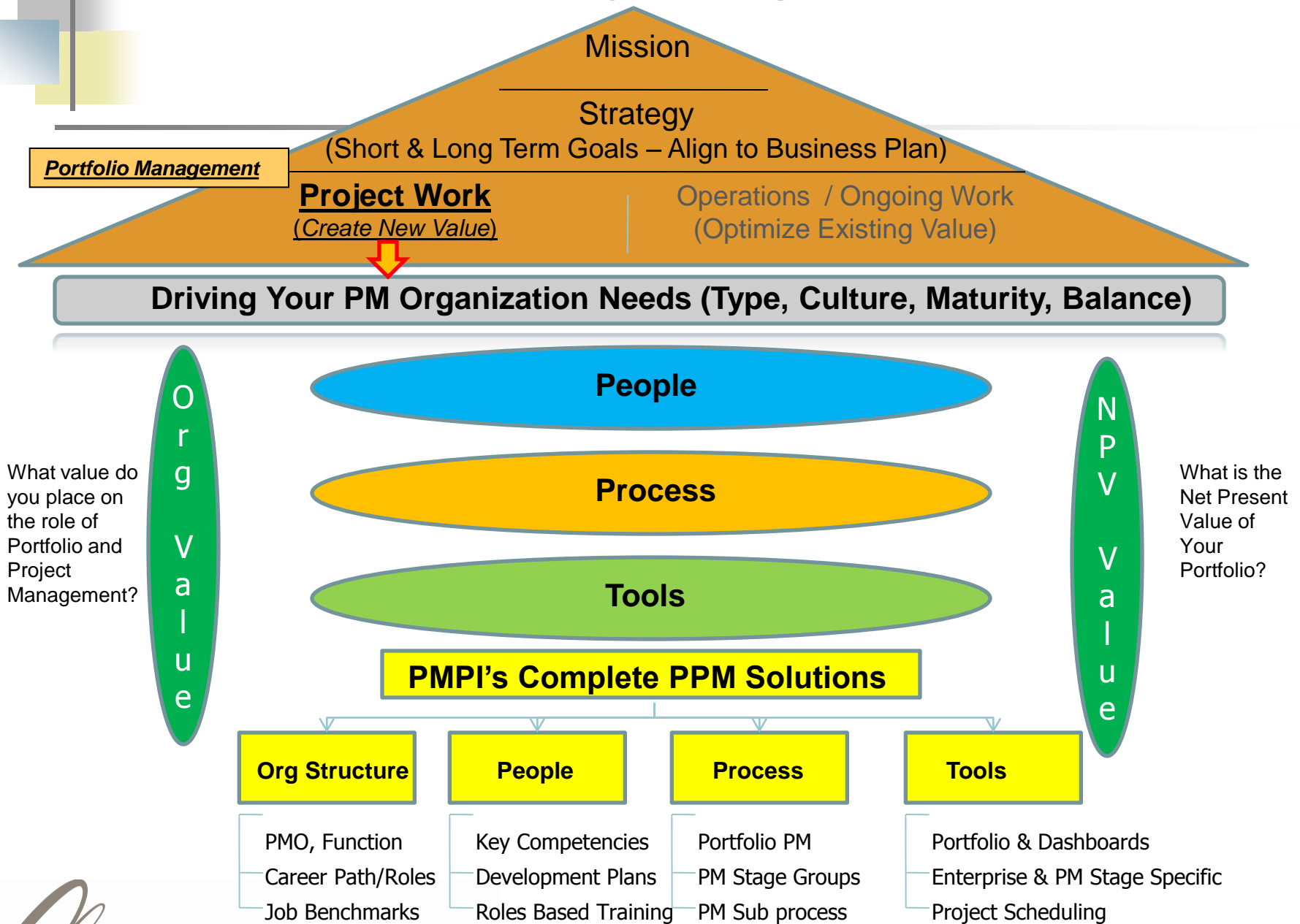


- Implemented PM and Project Server systems for large and small – private and public sector

- Founding partner and executive team member of Project Management Practice, Inc. (PMPI)

[www.pm-practice.com](http://www.pm-practice.com)

# PMPI's Total Project Management (TPM)™





# Program Overview

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- ◆ Part 1 – Planning Essentials
- ◆ Part 2 – Communicating Essentials
- ◆ Part 3 – Tracking Essentials



# Training Will Help

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Recent Microsoft customer research that shows that “with just two days of training, Project users score 30-50% higher on ease of use, usefulness, importance, and satisfaction in using the tool”.

*Real World Scenario: Client with no previous Project training – moving from frustrated PM’s to enabled PM’s*



# Microsoft Project Certification

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- As project management has grown, organizations have asked Microsoft to help make it easier to identify individuals that have knowledge and expertise in the field and with Microsoft Project
- Project 2010 certification – 70-178: Microsoft Project 2010, Managing Projects exam focuses on desired outcome and results.
- Certification program was created to help make the identification of skilled project managers easier.

*Real World Scenario: How many potential or existing PM's say they know how to use Project but do not use it effectively?*

# Project 2010 Project Management

Get the most out of Microsoft's latest release of the popular project management tool, Project 2010, with this comprehensive guide from Author Robert Happy.

**ISBN:** 978-0470561102

**Price:** \$49.99

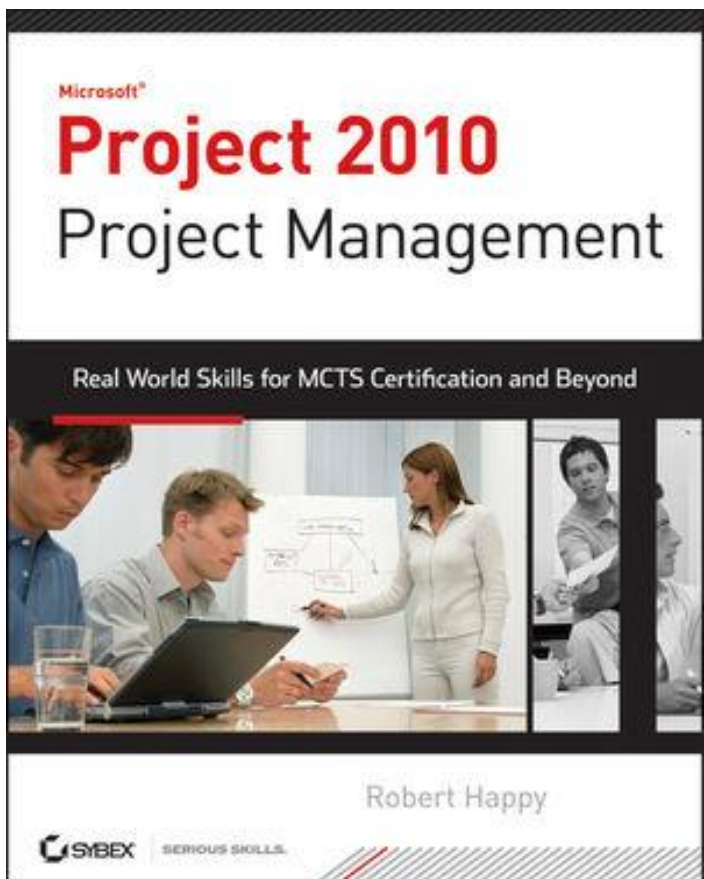
**Available:** Now

**Pages:** approx. 600

**Media:** CD, with videos, sample files, and PDF of book

Can be pre-ordered - from your favorite bookstore, including Amazon, Barnes&Noble, or check out

[www.sybex.com/go/happy](http://www.sybex.com/go/happy)

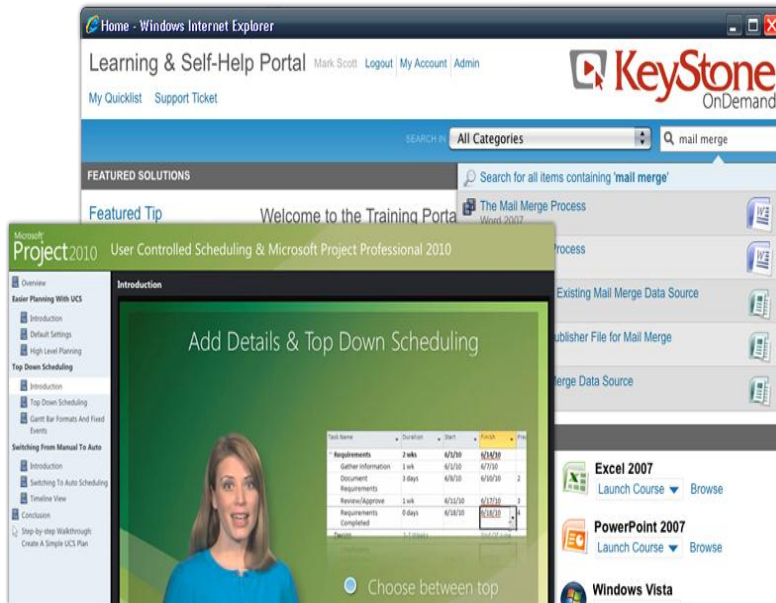


**Note:** Prepares Candidates for **Certification** Exam 70-178, Microsoft Project 2010, Managing Projects



# Video Based eLearning (CBT) Training for Project 2010

Offers 16 PDU (PMI) credits and prepares for Microsoft Project Certification Exam



When you purchase "Project 2010 Project Management: Real World Skills for Certification and Beyond" by Robert Happy, PMP, **save \$50 on the Project 2010 Core Essentials course.**

Get the most out of Microsoft Project 2010, with this **video-based**, on-demand training course from Project Management Practice, Inc and Keystone Learning Systems.

In this course Robert combines real-world examples and step-by-step instruction to equip you with the knowledge you need to effectively plan, track, and execute projects in Project 2010.

**Price:** \$449- \$399

**Available:** Now

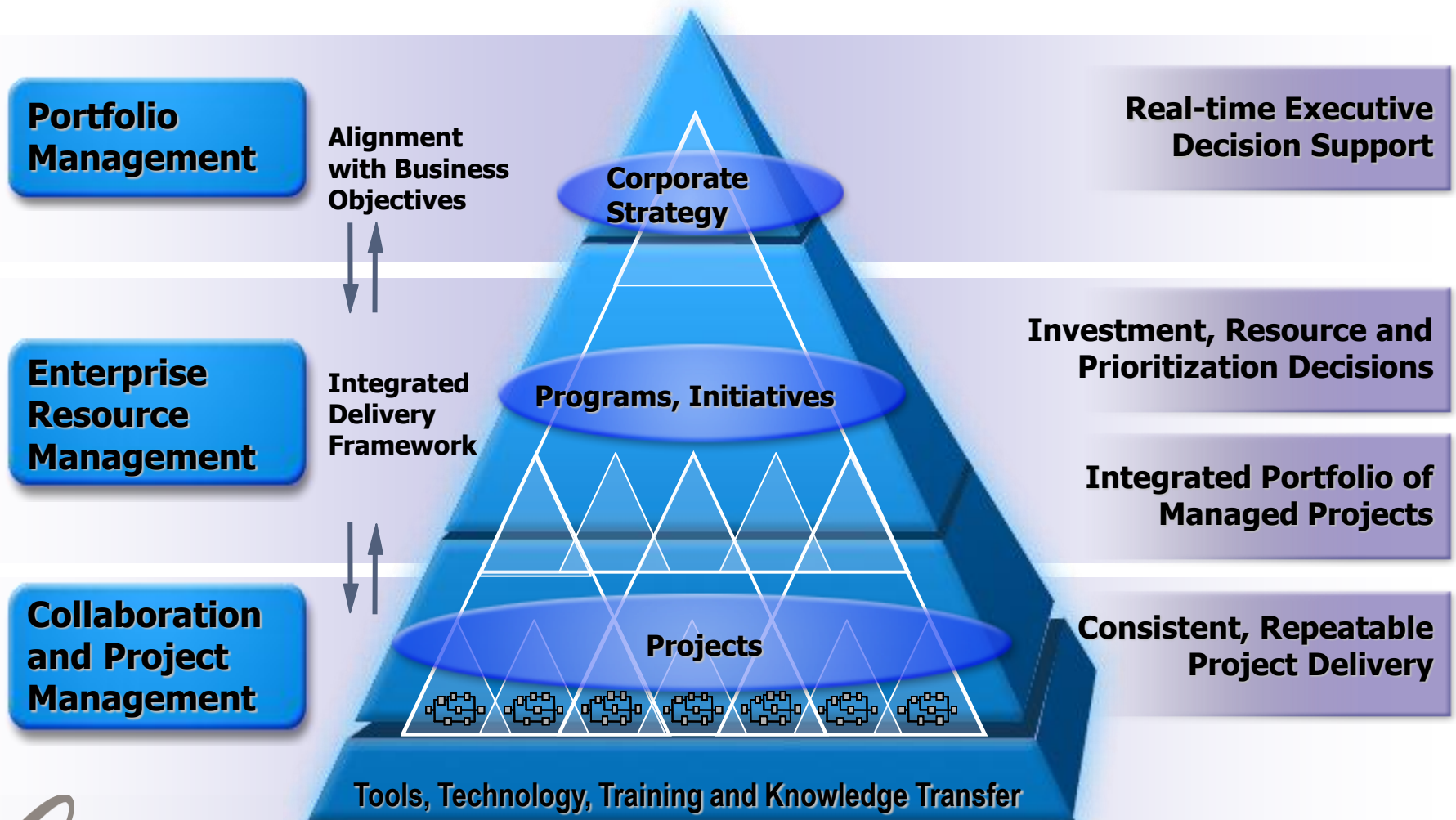
**Includes:** 100 + lessons, Videos, Sample Files, Quizzes, Exercises, and complete KeyNotes.

**Media:** Online or DVD-ROM.

"I just finished taking your course on Microsoft Project Core Essentials, and absolutely loved it! I plan on sitting for my MCTS exam...Thank you once again for a fantastic class!"

*Unsolicited email from a certified PMP customer*

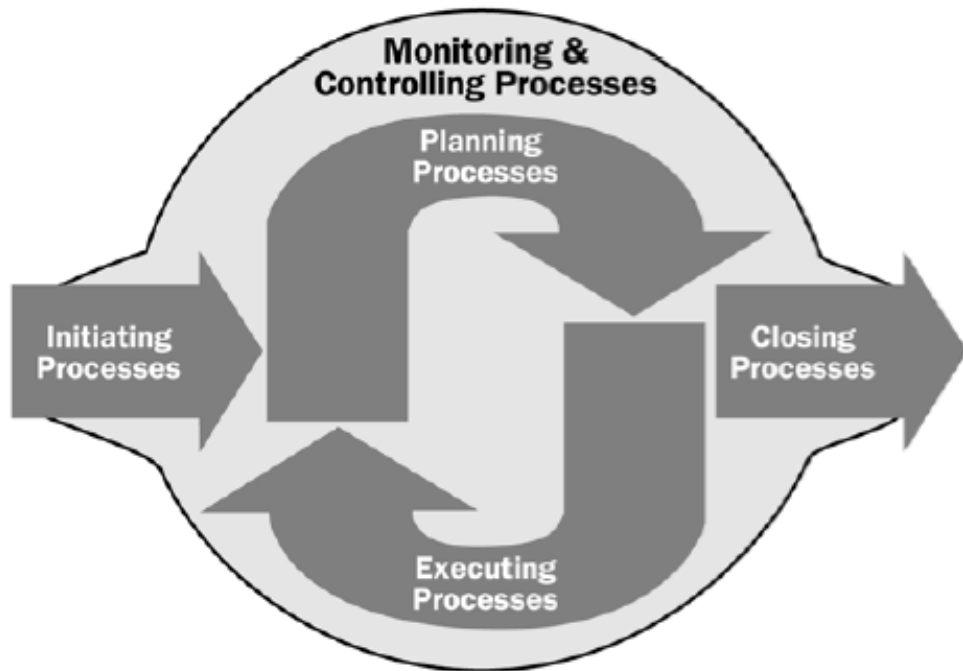
# Strategic Fit of Project 2010



# PMI Process Groups

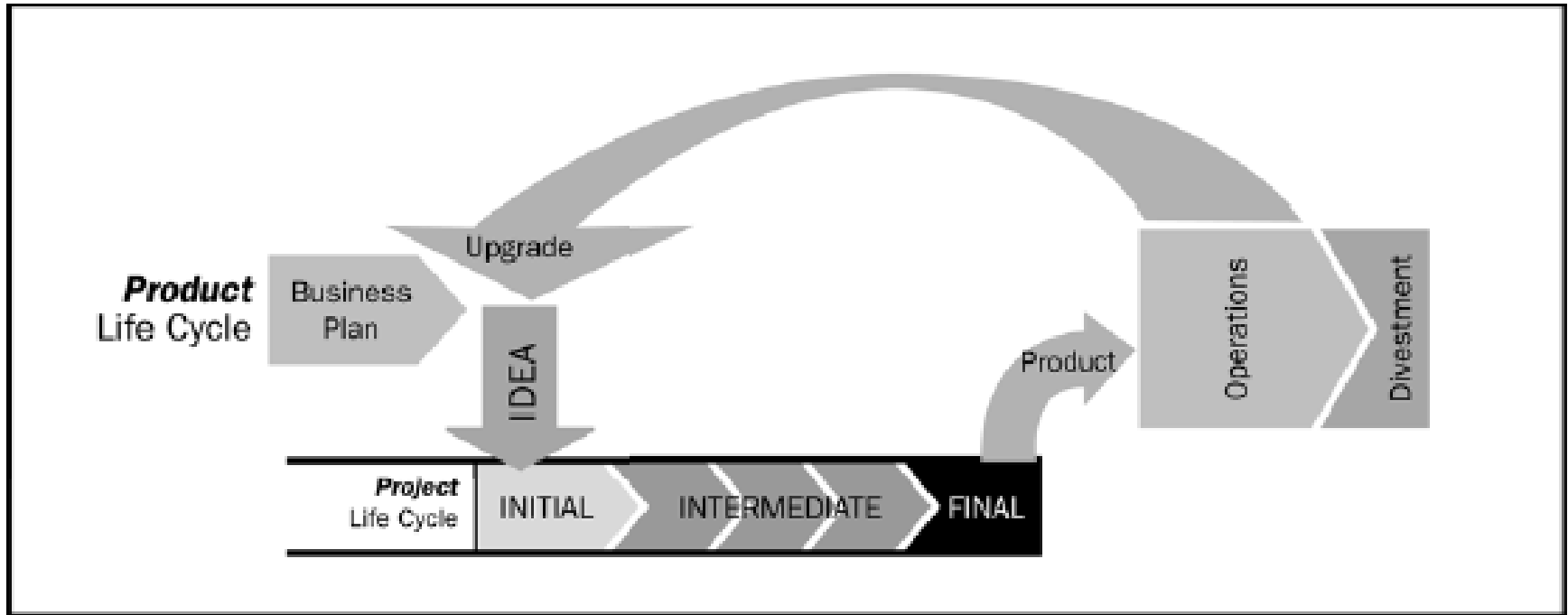
1. Initiating
2. Planning
3. Executing
4. Monitoring & Controlling
5. Closing

**Project better  
supports Modern Day  
Project Management  
Techniques**



# PM Life Cycle vs. Product Life Cycle

PMBOK Guide



**Microsoft Project as an Enabling Tool Here**

# Constraints Projects Have to Live By



Managing your constraints  
with Project 2010

- A project manager is responsible for accomplishing project objectives
  - within scope
  - on time
  - within budget
- Project quality is impacted by managing these three key factors
- Project is specifically designed for this purpose with easy to use tools for small or big projects



# Program Overview

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Part 1 – Planning Essentials

Part 2 – Communicating Essentials

Part 3 – Tracking Essentials

# How Do I Get Started?



- ◆ Overview of the new look
  - ◆ Gantt Chart with Timeline view
  - ◆ Zoom Slider, Status Bar Area
- ◆ New Ribbon Interface
  - ◆ Logical Groupings of Commands
  - ◆ Easily Customize Quick Access Toolbar
- ◆ Checking out the 'Backstage'
  - ◆ Managing project files and templates
  - ◆ Adjust Key Project Options to meet your needs
- ◆ Define the project start date
- ◆ Apply calendars that match how we work

The background of the slide features a light gray gradient with a horizontal band of darker gray. Overlaid on this are several silhouettes of people in business attire. In the foreground, a man and a woman are standing and talking. To the right, a woman is standing and talking on a mobile phone. In the background, two more people are visible, one standing and one walking. The overall aesthetic is professional and modern.

# demo

Getting Started





# What We Discussed - Getting Started

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- ◆ Moving around the Gantt view & New Ribbon
- ◆ Changing views and the timescale
- ◆ Creating split screens (Timeline/Details)
- ◆ Defining the project start date
- ◆ Applying different calendars
- ◆ Key Option Settings (Manual vs. Automatic)



# What's Next – Planning Essentials

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## PMPI's 4 Key Steps to Planning Effectively

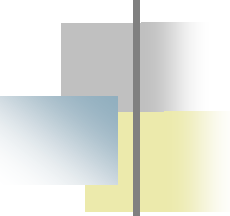
- ◆ Step 1: Enter the Work Breakdown Structure (WBS) & Task Arrangement
- ◆ Step 2: Estimating Duration (or Work)
- ◆ Step 3: Setting Dependencies (Networking)
  - ◆ Constraints & Deadlines
  - ◆ Understanding the Critical Path
- ◆ Step 4: Assigning Resources/Costs
  - ◆ Team Planner View
  - ◆ Resource Leveling
  - ◆ Assignment Units vs. Peak Units



# Step 1- Easily Enter Phases, Tasks and Milestones

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- ◆ The importance of the Task Name column
- ◆ Bring in plans from Excel
- ◆ Use the indent/outdent key to create different outline levels
- ◆ Use the Show Outline button to expand/collapse the plan
- ◆ Easily insert, delete or move tasks
- ◆ Automatically turn on a Project Summary Task
- ◆ Automatically turn on the outline number codes



# Planning & the Work Breakdown Structure (WBS)

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Begin with the end in mind –  
breaking the project down into manageable  
components is known as the

**Work Breakdown Structure** –

A hierarchical organization of work.



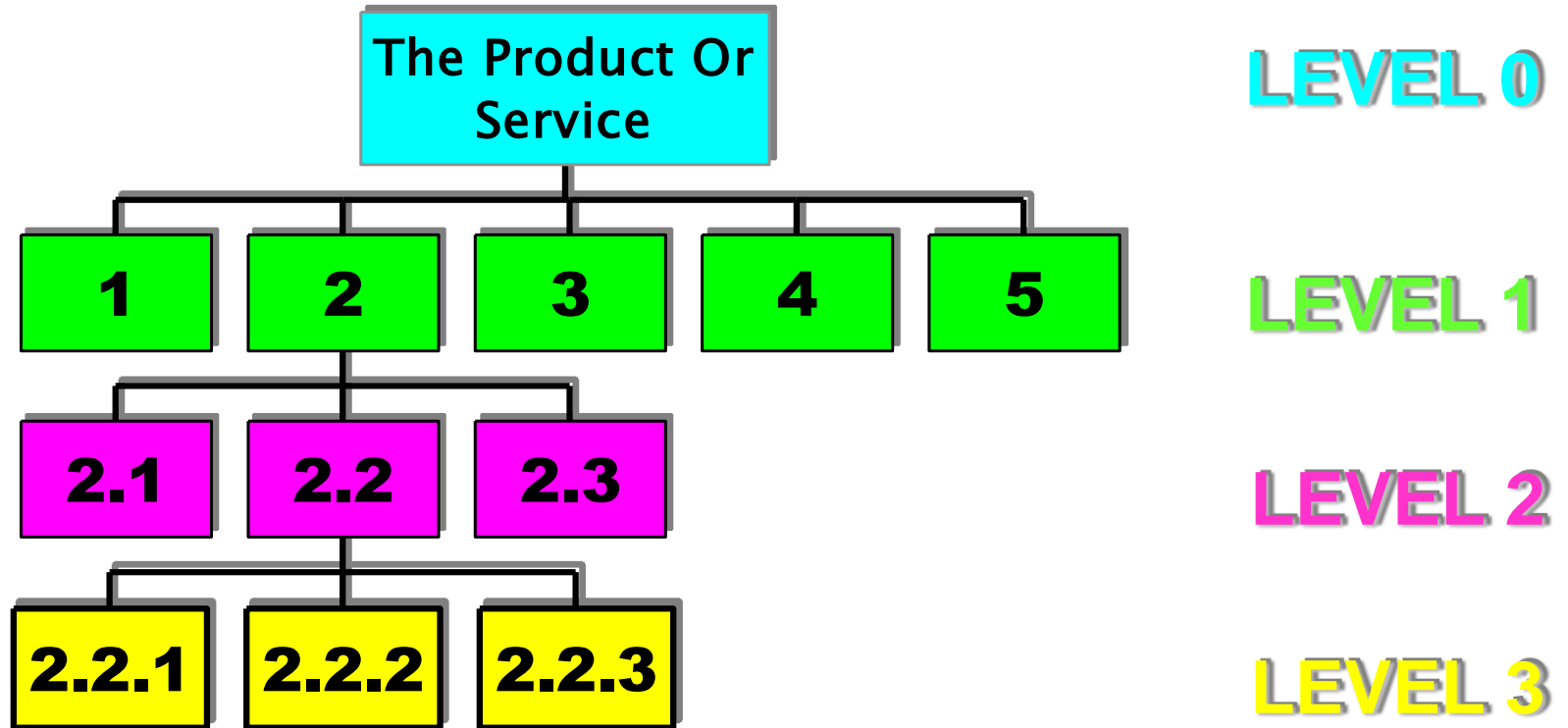
# Work Breakdown Structure

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- ◆ WBS groups and organizes the project elements into a chart or outline format.
- ◆ The WBS defines the total scope of the project.

*What is not in the WBS is outside the scope!*

# A WBS – Chart Format



# WBS – Outline Format

ID		Task Name
0		<b>WBS Template Example 1</b>
1		<b>1 Phase 1 (Interim Deliverable A)</b>
2		1.1 Task 1
3		1.2 Task 2
4		1.3 Task 3
5		1.4 Task 4
6		1.5 Task 5
7		1.6 Milestone A Completed
8		<b>2 Phase 2 (Interim Deliverable B)</b>
9		2.1 Task 1
10		2.2 Task 2
11		2.3 Task 3
12		2.4 Task 4
13		2.5 Task 5
14		2.6 Task 6
15		2.7 Milestone B Completed
16		<b>3 Phase n (Last Interim Deliverable)</b>
17		3.1 Task 1
18		3.2 Task 2
19		3.3 Task 3
20		3.4 Task 4
21		3.5 Task n
22		3.6 Milestone n Completed



# Deliverables Based WBS

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## (0) Final Deliverable

### 1.0 Interim Deliverable 1

1.1 Task 1

1.2 Task 2

1.3 Task n

1.4 Key Milestone – Deliverable Achieved

### 2.0 Interim Deliverable 2

2.1 Task 1

2.2 Task 2

2.3 Task n

2.4 Milestone – Deliverable Achieved

### 3.0 Interim Deliverable n



The background of the slide features a light gray gradient with a horizontal band across the middle. Overlaid on this are several faint, gray silhouettes of business professionals. On the left, two people are shown from behind, facing each other as if in conversation. To their right, another person stands with their hands on their hips. Further right, a person is walking while talking on a mobile phone. On the far right, a larger silhouette of a person is shown in profile, also on a phone call. The overall aesthetic is professional and modern.

# demo

**Step 1: Enter Phases, Tasks, Milestone  
(Work Breakdown Structure)**



# What We Discussed – Enter Phases, Tasks and Milestones

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- ◆ Task Name column
- ◆ Importing plans from Excel
- ◆ Using Enhanced Copy & Paste
- ◆ Outlining with Indent/Outdent tools
- ◆ Using the Show Outline tool
- ◆ Inserting, deleting and moving tasks
- ◆ Project summary task
- ◆ Using outline number codes



# What's Next:

## Step 2 - Estimating Duration

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- ◆ Using working day conversions
- ◆ Manual vs. Automatic
- ◆ Enter directly into duration column
- ◆ Task information
- ◆ Click and drag Gantt bar
- ◆ Use split screen view

The background of the slide features several light gray silhouettes of people in a professional or business environment. On the left, two figures are engaged in a conversation. In the center-right, a person stands holding a document. On the far right, a woman is depicted talking on a mobile phone. The overall aesthetic is clean and modern, with a light gray color palette.

# demo

## Estimating Duration



# What We Discussed

## - Estimating Duration

---

- ◆ Estimating duration in terms of working days
- ◆ Using the duration column (Manual vs. Automatic)
- ◆ Using the task information box
- ◆ Entering duration in the split screen view



# What's Next:

## Step 3 - Task Dependencies

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- ◆ Easily use the link and unlink tools
- ◆ Enter directly into the predecessor column
- ◆ Use the split screen view to add lag
- ◆ Change from Finish to Start to Start to Start
- ◆ Use the click and drag approach in the Bar area
- ◆ Manual Scheduling and Respect the Links
- ◆ Top Down Estimating
- ◆ Solve problems with the Task Inspector

The background of the slide features a light gray gradient with a horizontal band across the middle. Overlaid on this are several silhouettes of people in business attire. On the left, a man and a woman stand close together, facing each other. To their right, a man stands alone, looking towards the right. Further right, another man stands with a woman, both looking in the same direction. On the far right, a woman stands in profile, talking on a mobile phone. The overall aesthetic is professional and modern.

# demo

Setting Dependencies



# What We Discussed – Setting Task Dependencies

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- ◆ Using the link and unlink tools
- ◆ Entering dependencies directly into predecessor column
- ◆ Using the split screen to enter lag or change 'finish to start' to 'start to start'
- ◆ Clicking and dragging between tasks to set links
- ◆ Top Down Estimating
- ◆ Respect Links and Manual Scheduling
- ◆ Use the Task Inspector to help





# 6 Key Drivers that Impact the Calculation of **Time** for Automatic Scheduling

---

1. Duration Estimates
2. Project Start Date (Project Information)
3. Calendars
4. Constraints (99%=ASAP)
5. Dependencies (Networking)
6. Resource Assignments ( $W=D*U$ )

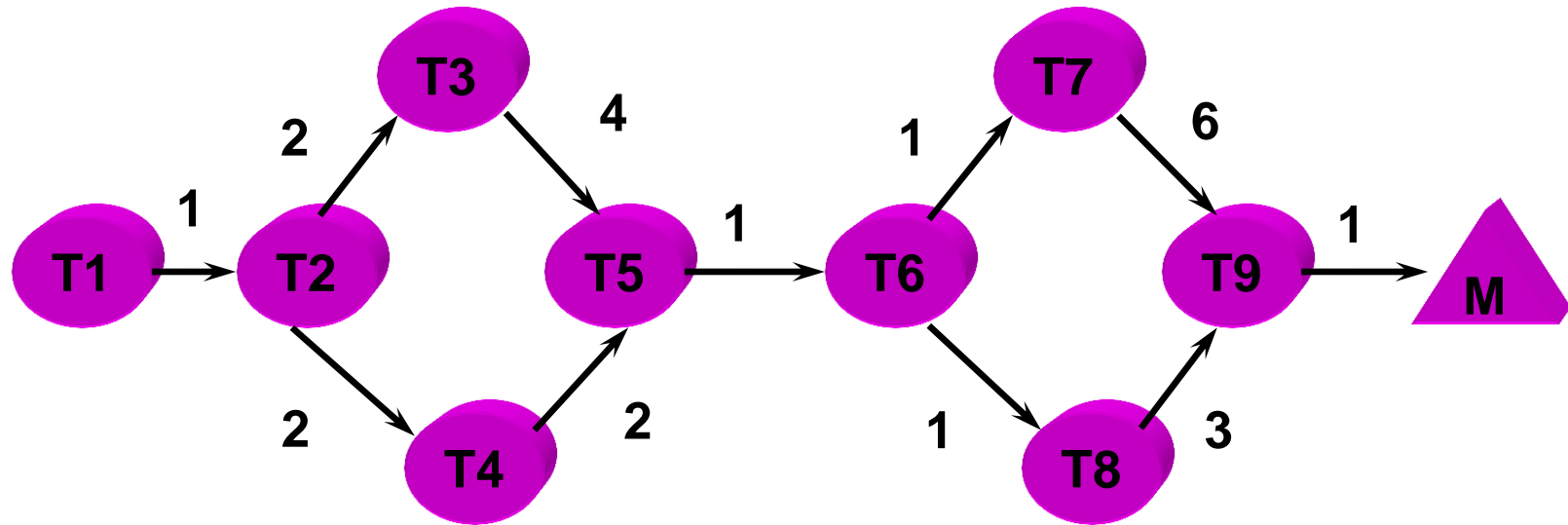


# Critical Path

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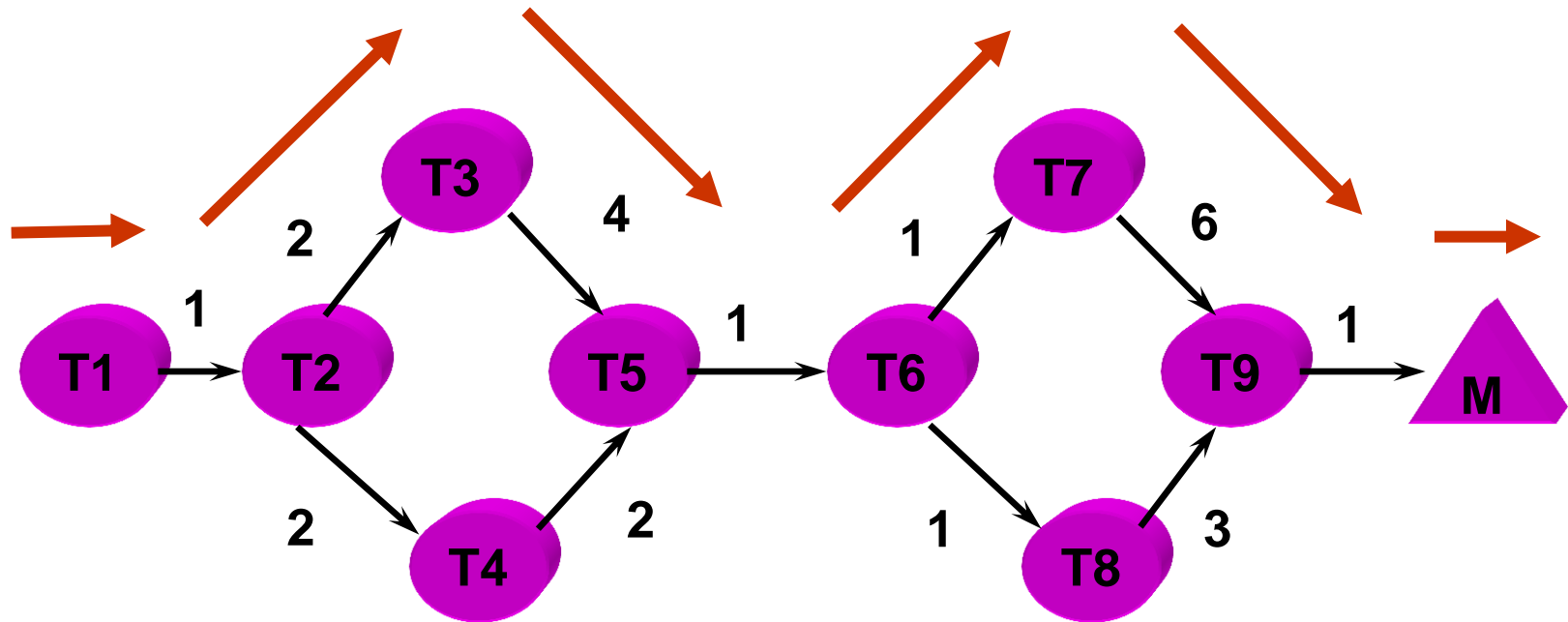
- ◆ One sequence of tasks that fixes the duration of the project
- ◆ Any slippage of any task(s) on the Critical Path will cause the project to finish later than planned

# Critical Path Network



Task	Early Start	Late Start	Early Finish	Late Finish	Total Slack
T3	3d	3d	7d	7d	0
T4	3d	5d	5d	7d	2
T7	9d	9d	15d	15d	0
T8	9d	12d	12d	15d	3

# Identify the Critical Path



The background of the slide features a light gray gradient with a horizontal band of darker gray. Overlaid on this are several silhouettes of business professionals. In the foreground, a man and a woman stand with their backs to the camera, looking towards the right. To their right, a woman stands in profile, talking on a mobile phone. In the background, two more figures are visible: a small person standing and another person standing and talking. The overall aesthetic is clean and professional.

# demo

Critical Path



# What We Discussed – Reviewing & Analyzing Critical Path

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- ◆ What is the Critical Path
- ◆ Formatting Text Styles
- ◆ Formatting Bar Styles
- ◆ Displaying Total Slack
- ◆ Managing Your Project Life Cycle



# What's Next:

## Step 4 - Assigning Resources & Costs

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- ◆ Setting up a resource pool
- ◆ Assign resources in the Resource Name column
- ◆ Using the Assign Resource tool
- ◆ Modify details with the split screen view
- ◆ Using the Team Planner view
- ◆ Overview the project summary including total work and costs in Project Statistics



# Assigning Resources

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- ◆ Create resources in the Resource Sheet or share an existing resource pool
- ◆ When a Resource is added to a task, Work is calculated
- ◆ Avoid Assigning to Summary Tasks
- ◆ Use the 'Smart Tags'
- ◆ Can select 'Multiple Tasks/Resources'





# Resource Availability

## MAX UNITS

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- ◆ Represents the percentage of the Standard Calendar the resource is available to perform project related work
- ◆ If Standard Calendar is 8 hours per day:
  - ◆ 100% equates to 8 hours of project work
  - ◆ 50% equates to 4 hours of project work
  - ◆ 80% equates to 6.4 hours of project work
- ◆ Resources are over allocated when their assigned work exceeds their Max Units



# Task Types: $Work = Duration * Units$

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- ◆ DURATION - Period of time over which a task occurs
- ◆ **Fixed Duration** task is not affected by the amount of resources or the work of the resources
- ◆ A 10-day Fixed Duration task takes 10 days, always



# Task Types: $\text{Work} = \text{Duration} * \text{Units}$

---

- ◆ WORK - the amount of time resources spend performing the task
- ◆ **Fixed Work** remains the same even if resources are added or removed
- ◆ 2-day Fixed Work task takes 2 days of work (amount of resources and duration may change)

# Task Types: $\text{Work} = \text{Duration} * \text{Units}$

---

- ◆ UNITS - the allocation percentage for a resource assignment to a task
- ◆ **Fixed Units** allows the project manager to edit the work or duration of a task and have the software calculate the work required over the span/duration of the assignment
- ◆ A Resource assigned at 50% will remain 50% committed to Fixed Units task regardless

# Work = Duration \* Units

Task Type	When PM adds resource, this will change	When PM changes duration, this will change	When PM changes work, this will change	When PM changes units, this will change
Fixed Duration	Units	Work	Peak Units*	Work
Fixed Work	Duration	Peak Units	Duration	Duration
Fixed Units	Duration	Work	Duration	Duration

\*New In Project 2010 – the units field does not recalculate automatically. It retains the original default estimate of 100% unless manually changed. Instead, it uses the Peak Units field to display fluctuations in work.

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# demo

Assigning Resources & Costs



# 6 Key Drivers That Impact the Calculation of **Time** for Automatic Scheduling

---

1. Project Start Date
2. Calendars
3. Duration Estimates
4. Setting Dependencies
5. Task Constraints (Majority = ASAP)
6. Resource Assignments ( $W=D*U$ )



# Planning Essentials Review

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- ◆ Planning and the Work Breakdown Structure (WBS)
- ◆ 4 Steps To Successful Planning
  - ◆ Step 1: Enter & Modify Phases, Tasks, and Milestones (Work Breakdown Structure)
  - ◆ Step 2: Enter & Modify Duration Estimates
  - ◆ Step 3: Enter & Modify Task Dependencies
  - ◆ Step 4: Assign Enterprise Resources
- ◆ Critical Path – Focus on Tasks Driving Your Completion

**Note:** The above steps can be applied when creating projects from a blank project or initiating a plan from a template.





# Program Overview

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- ◆ Part 1 – Planning Essentials
- ◆ **Part 2 – Communicating Essentials**
- ◆ Part 3 – Tracking Essentials



# Part 2 Overview

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- ◆ Understanding Views
  - ◆ 2 New Views – Timeline and Team Planner
- ◆ Tables and Custom Fields
- ◆ Filters, Groups, Highlights, Sorts
- ◆ Visual Reports and Reports
- ◆ Rich Copy and Paste
- ◆ Sharing Project Information

# Communicating to Multiple Stakeholders – No Easy Job



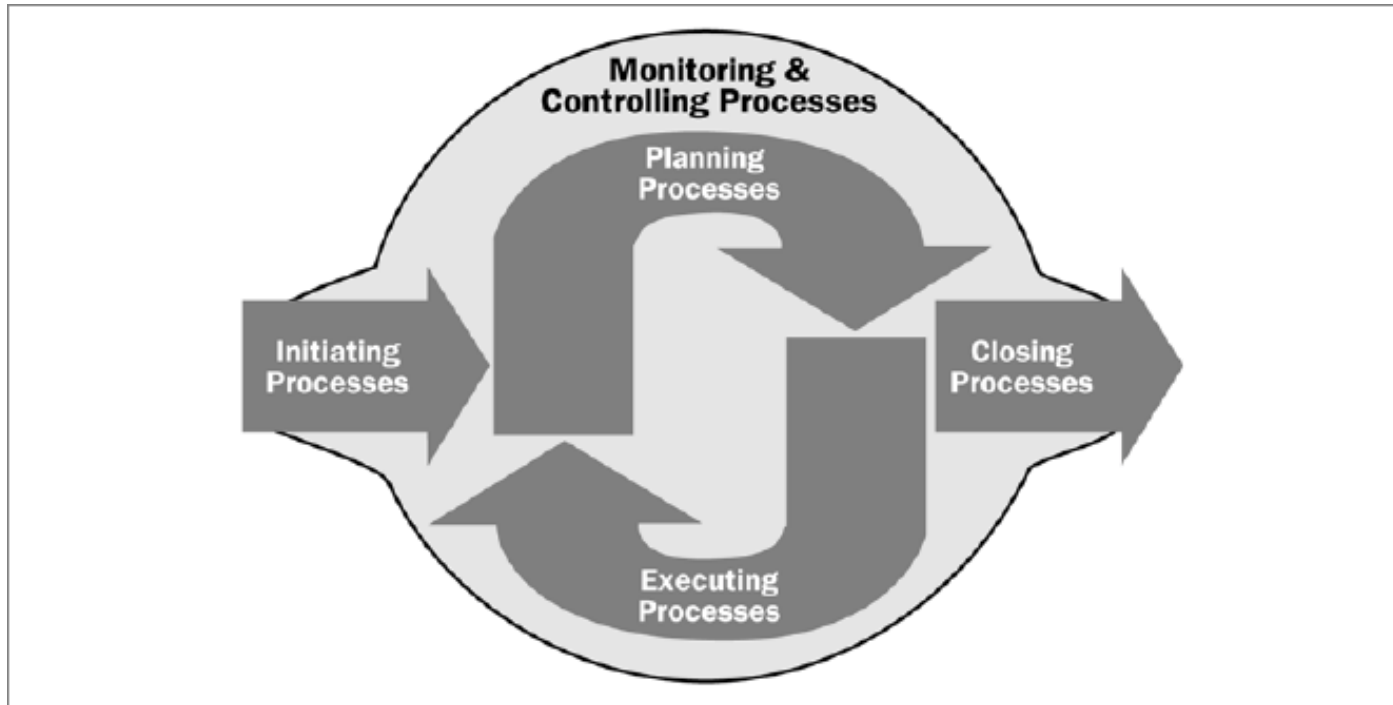
# PM's Spend Significant Time Communicating

## – A Key to Success

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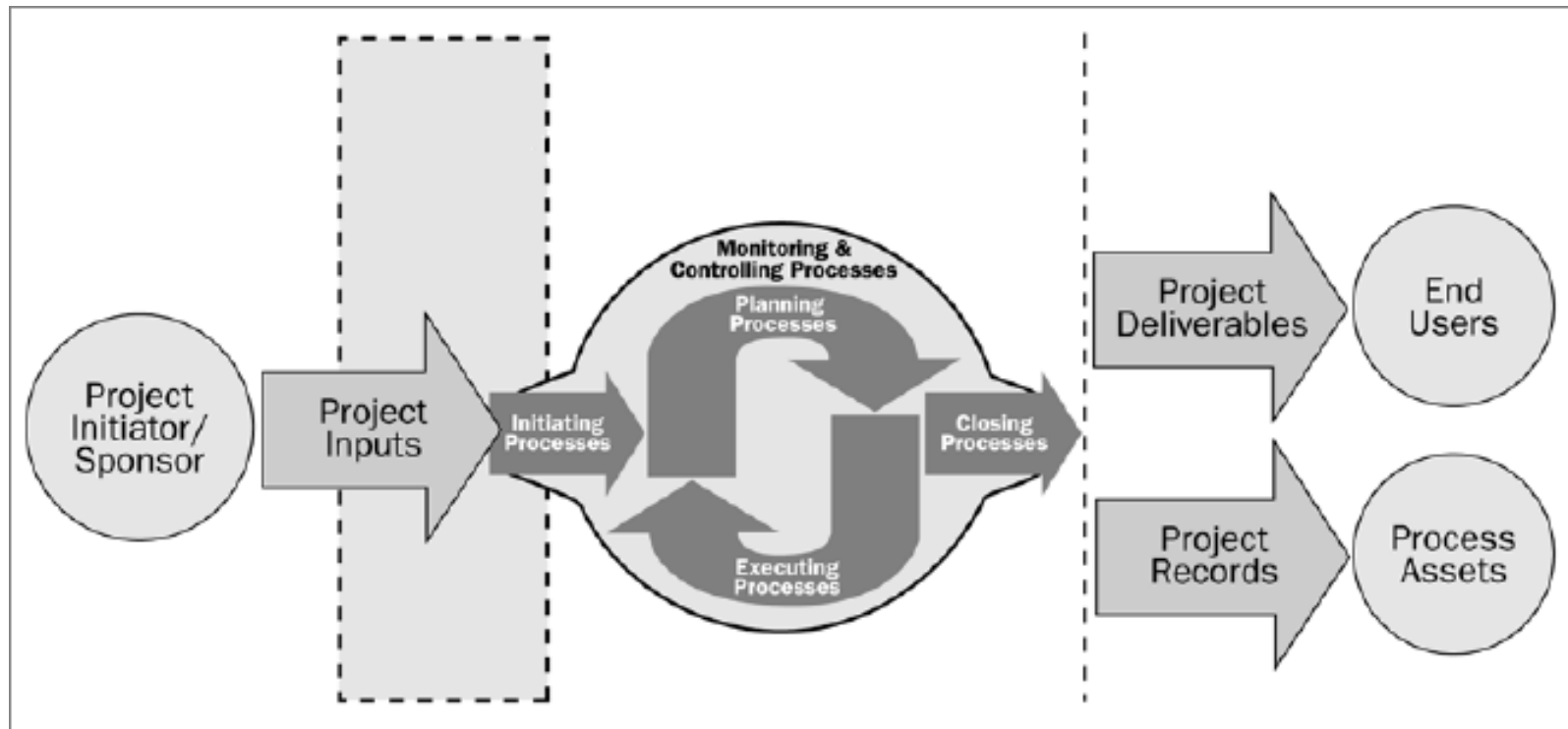
- ♦ As the number of people involved in the project increases, the number of potential communication channels increases.
- ♦ The following formula represents the number of potential communication channels that may exist:  $n(n-1)/2$ 
  - ♦ **5 people = 10 channels**
  - ♦ **10 people = 45 channels**
  - ♦ **20 people = 190 channels**
- ♦ Manage your communication effectively

# PMI Process Groups



Microsoft Project is an enabling Communication & Reporting tool for each PM Process

# As You Drive Toward Deliverables – Use Project to Help Keep Project Records



Reprinted from PMI PMBOK 3<sup>rd</sup> Edition



# What's Next – Use Different Fields & Tables?

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- ◆ Using the default Entry table
- ◆ Change from one table to another
- ◆ Insert or hide columns in an existing table
- ◆ Move columns around by clicking and dragging
- ◆ Creating New Fields
- ◆ Creating New Tables

The background of the slide features several light gray silhouettes of people in business attire. On the left, a man and a woman are standing and talking. In the center, a man is walking towards the right. On the right side, a woman is standing and talking on a mobile phone. The silhouettes are set against a light gray background with a subtle horizontal gradient.

# demo

Applying and Creating Fields and  
Tables





# What We Discussed – Applying Different Tables & Fields

---

- ◆ Default Entry table
- ◆ Changing & creating tables
- ◆ Changing & creating fields
- ◆ Inserting or hiding columns in a table
- ◆ Clicking and dragging to move columns in a table



# What's Next –

## Applying Filters, Highlights and Groups


---

- ◆ Apply filters
  - ◆ Filter for Milestones
  - ◆ Using the Date Range filter
  - ◆ Filter for Resources
- ◆ Using the Auto-filter function
- ◆ Using the Highlights
- ◆ Apply groups
  - ◆ Group by Milestones
  - ◆ Group by Critical Tasks

The background of the slide features faint, light-gray silhouettes of several people in a professional or business environment. On the left, two people are standing and facing each other. In the center, a person is standing with their back to the camera. To the right, a person is standing and talking on a mobile phone. Further back, two more people are visible, one standing and one sitting. The overall scene suggests a collaborative work environment.

# demo

Groups, Filters & Highlights



# What We Discussed – Using Filters and Groups

---

- ◆ Applying filters
- ◆ Using different filters such as milestones, date range, and resources
- ◆ Using the Auto-filter function
- ◆ Applying Highlights
- ◆ Applying groups
- ◆ Grouping by Milestones
- ◆ Grouping by Critical Path



# Apply Different Views

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- ◆ Use the Timeline View
- ◆ Use the Team Planner View
- ◆ Use Calendar View
- ◆ Use Network Diagram
- ◆ Apply the Task Usage View
- ◆ Apply the Resource Usage View
- ◆ Create various split screen views such as with a resource graph

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# demo

Using Different Views



# What We Discussed - Using Different Views

---

- ◆ Timeline & Team Planner View
- ◆ Understanding the Calendar view
- ◆ Network Diagram view
- ◆ Task Usage view
- ◆ Resource Usage view
- ◆ Split screen with Resource Graph



# What's Next –More Collaborating & Reporting Capabilities

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- ◆ Visual reports
- ◆ Discover other pre-defined reports
- ◆ Use Enhanced Copy and Paste
- ◆ Use the Save & Send for different formats
- ◆ SharePoint Task List Synchronization

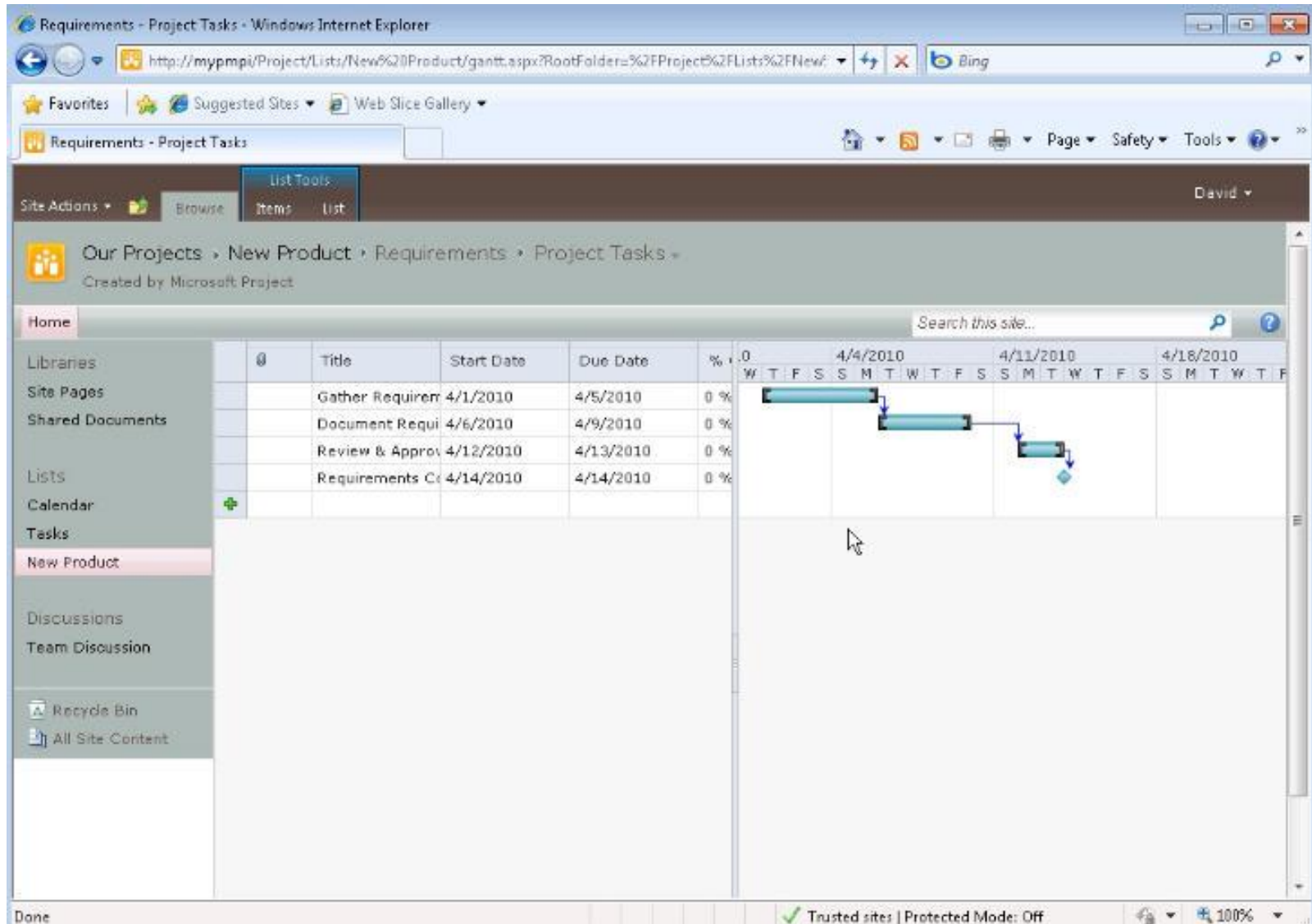


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# demo

Reports and Collaboration

# Sample Task List in SharePoint





# What We Discussed – Collaborating & Reporting Capabilities

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- ◆ Using 'Visual' and pre-defined reports
- ◆ Using the Save & Send
- ◆ Use Enhanced Copy & Paste
- ◆ Synchronize with SharePoint

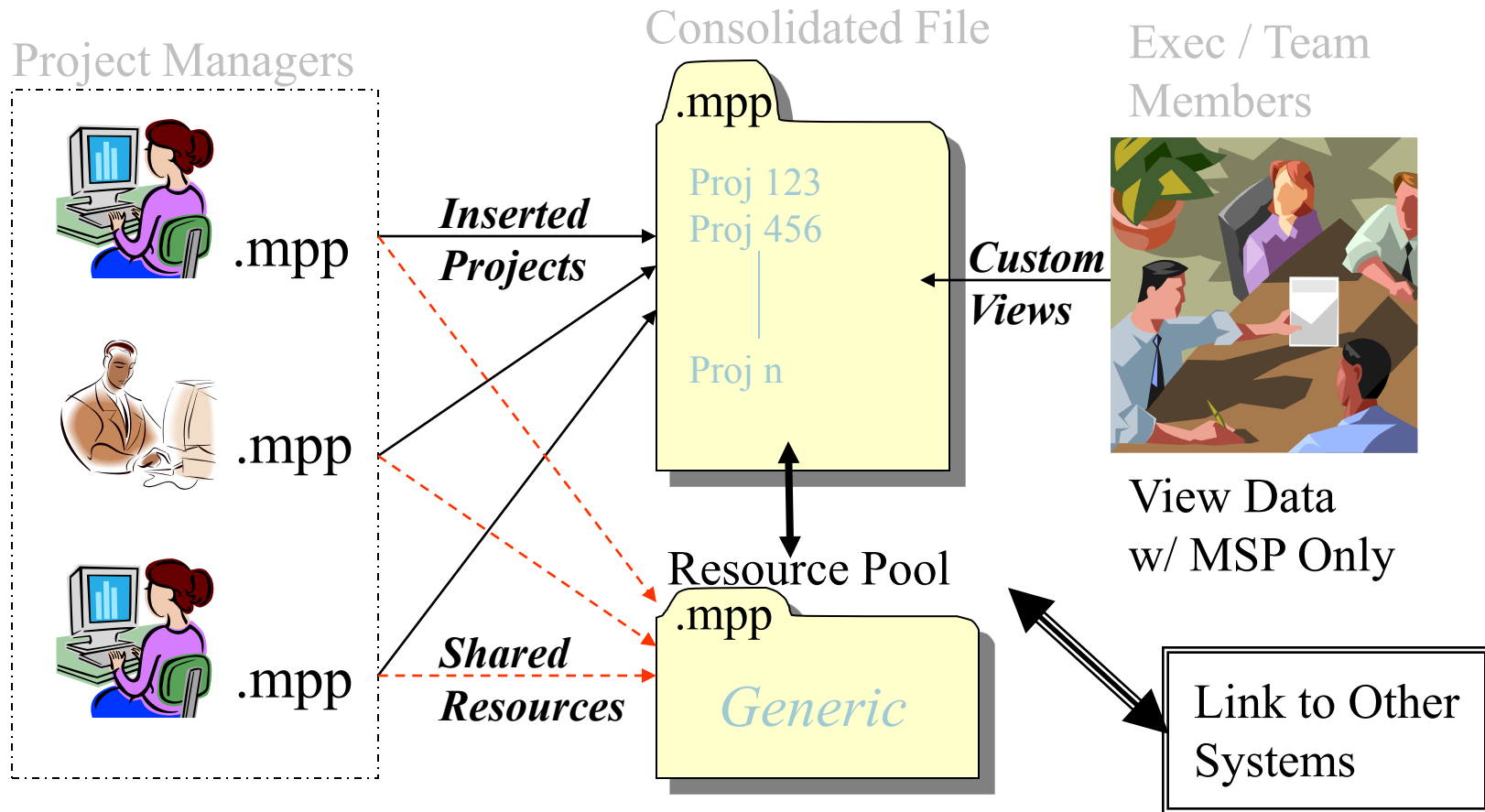


# What's Next –Master Schedules

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- ◆ Creating Master Schedules
- ◆ Cross Project Dependencies
- ◆ External Predecessors and Successors
- ◆ Creating and Sharing a Resource Pool
- ◆ View Resource Assignments Across Projects

# Multiple Projects without Project Server



The background of the slide features several light gray silhouettes of people in business attire. On the left, a man and a woman are standing and talking. In the center-right, a man is talking on a mobile phone. To his left, another man is looking at a device. Further back, a small figure of a person is visible. The overall scene suggests a professional or corporate environment.

# demo

## Master Schedules



# What We Discussed— Master Schedules

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- ◆ Master Schedules
- ◆ Cross Project Dependencies
- ◆ External Predecessors and Successors
- ◆ Sharing a Resource Pool
- ◆ View Resource Assignments Across Projects



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- ◆ Part 1 – Planning Essentials
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- ◆ Part 3 – Tracking Essentials





# Updating and Tracking

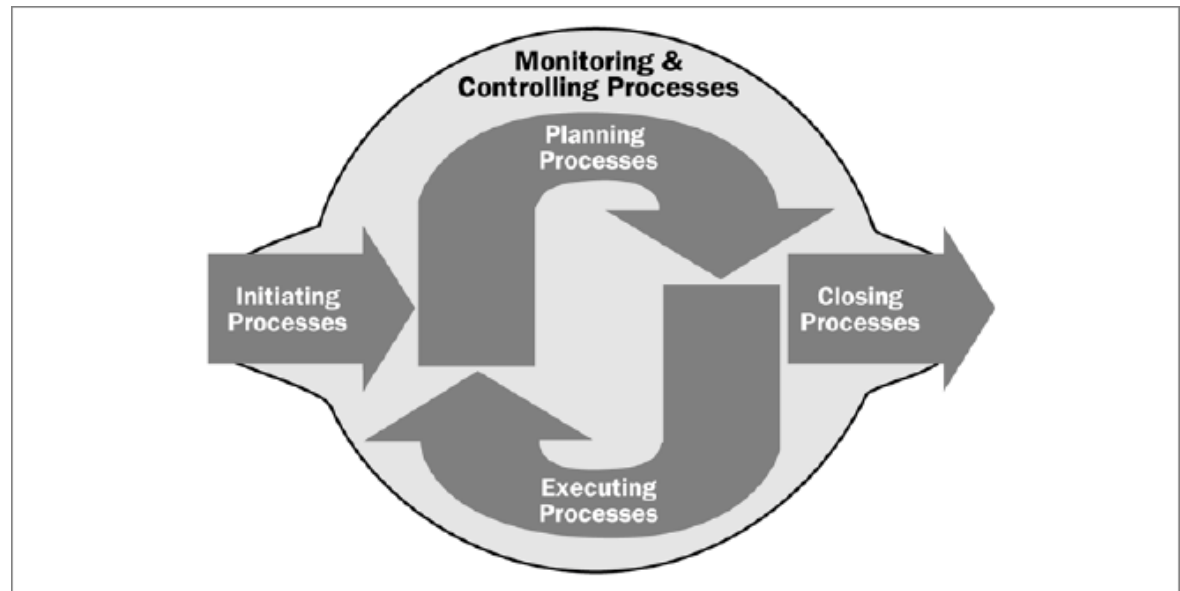
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- ◆ Project Management Fit
- ◆ Understanding and Setting Baselines
- ◆ Setting Up Tracking Views
- ◆ Updating Your Plan (%Complete and Actuals)
- ◆ Analyzing Your Plan

# PMI Process Groups

1. Initiating
2. Planning
3. Executing
4. Monitoring & Controlling
5. Closing

Tracking & Analyzing



Reprinted from PMI PMBOK 3<sup>rd</sup> Edition

# Constraints Projects Have to Live By



Managing your constraints  
with Project 2010

- A project manager is responsible for accomplishing project objectives
  - within scope
  - on time
  - within budget
- Project quality is impacted by managing these three key factors
- Project is specifically designed for this purpose with easy to use tools for small or big projects



# Set-up an Effective Tracking View and Understanding & Setting Baselines

---

- ◆ The baseline vs. the current plan
- ◆ Set the baseline
- ◆ Reset or clear a baseline
- ◆ Multiple Baselines
- ◆ Use the Tracking Gantt view to help
- ◆ Apply the Variance Table

The background of the slide features a series of light gray silhouettes of business professionals in a modern office environment. On the left, a man and a woman are standing and talking. In the center-right, a man is talking on a mobile phone. To his left, another man is looking at a tablet. Further back, a small figure of a person is visible. The silhouettes are set against a light gray background with a subtle horizontal gradient.

# demo

## Set Up Tracking View



# What We Discussed - Understanding & Setting Baselines & Tracking Views

---

- ◆ Understanding the baseline vs. current plan
- ◆ How to set the baseline
- ◆ Resetting or clearing a baseline
- ◆ Using the Tracking Gantt view
- ◆ Using the Variance table



# What's Next –

## Updating % Complete & Actuals

---

- ◆ Easily mark tasks done with % Complete
- ◆ Enter actuals with the Update Tasks tools from the Schedule Group
- ◆ Use the Task Inspector
- ◆ Use the Inactive Task feature
- ◆ Use the automatic update function
- ◆ Tracking Table

The background of the slide features several light gray silhouettes of business professionals. On the left, a man and a woman are standing and facing each other as if in conversation. To their right, another person is partially visible. Further right, a man is walking towards the right side of the frame. On the far right, a woman is standing and talking on a mobile phone. The overall scene suggests a professional or corporate environment.

# demo

Updating - % Complete & Actuals





# What we Discussed – Updating Tasks

---

- ◆ Using % Complete to mark a task done
- ◆ Entering actuals with the Update Tasks button from the Tracking Toolbar
- ◆ Task Inspector & Inactive Tasks
- ◆ Automatic Update function
- ◆ Using Tracking table



# What's Next –Analyze Change Impact and Take Corrective Action?

---

- ◆ Apply the Slipped Tasks filter to help
- ◆ Use Group By Critical at the same time as the Slipped Task filter
- ◆ Easily analyze my plan using filters and groups together
- ◆ Modify my plan to bring it back on track
- ◆ Use the notes field to keep track of changes

The background of the slide features a light gray gradient with a horizontal band across the middle. Overlaid on this are several silhouettes of people in business attire. On the left, a man and a woman stand close together, facing away from the viewer. In the center-right, a man stands with his hands on his hips, facing the viewer. To his right, another man is seen in profile, holding a briefcase. On the far right, a woman stands in profile, talking on a mobile phone. The overall aesthetic is professional and minimalist.

# demo

Analyze Plan & Take Corrective Action



# What We Discussed – Analyzing Change and Taking Corrective Action

---

- ◆ Using the filtering and grouping tools to analyze changes
- ◆ Using the Show Change Highlighting tool to view the impact of making changes
- ◆ Modify the plan to bring it back on track
- ◆ Using the notes field to record reasons for changes



# What is Project Server 2010?

---

- ◆ Microsoft Project Server 2010 is built on Microsoft SharePoint Server 2010, bringing together powerful business collaboration platform services with structured execution capabilities
- ◆ Provides innovative capabilities across the entire lifecycle to help organizations effectively initiate, select, plan and deliver projects on time and within budget.



# The EPM Solution Capabilities

---

**Demand Management** - Intuitively capture all requests within a central repository, and manage them using governance workflow

**Portfolio Selection and Analytics** - Objectively prioritize, optimize, and select project portfolios that best align with the organization's business strategy

**Resource Management** - Proactively and reactively manage resources throughout the project life cycle

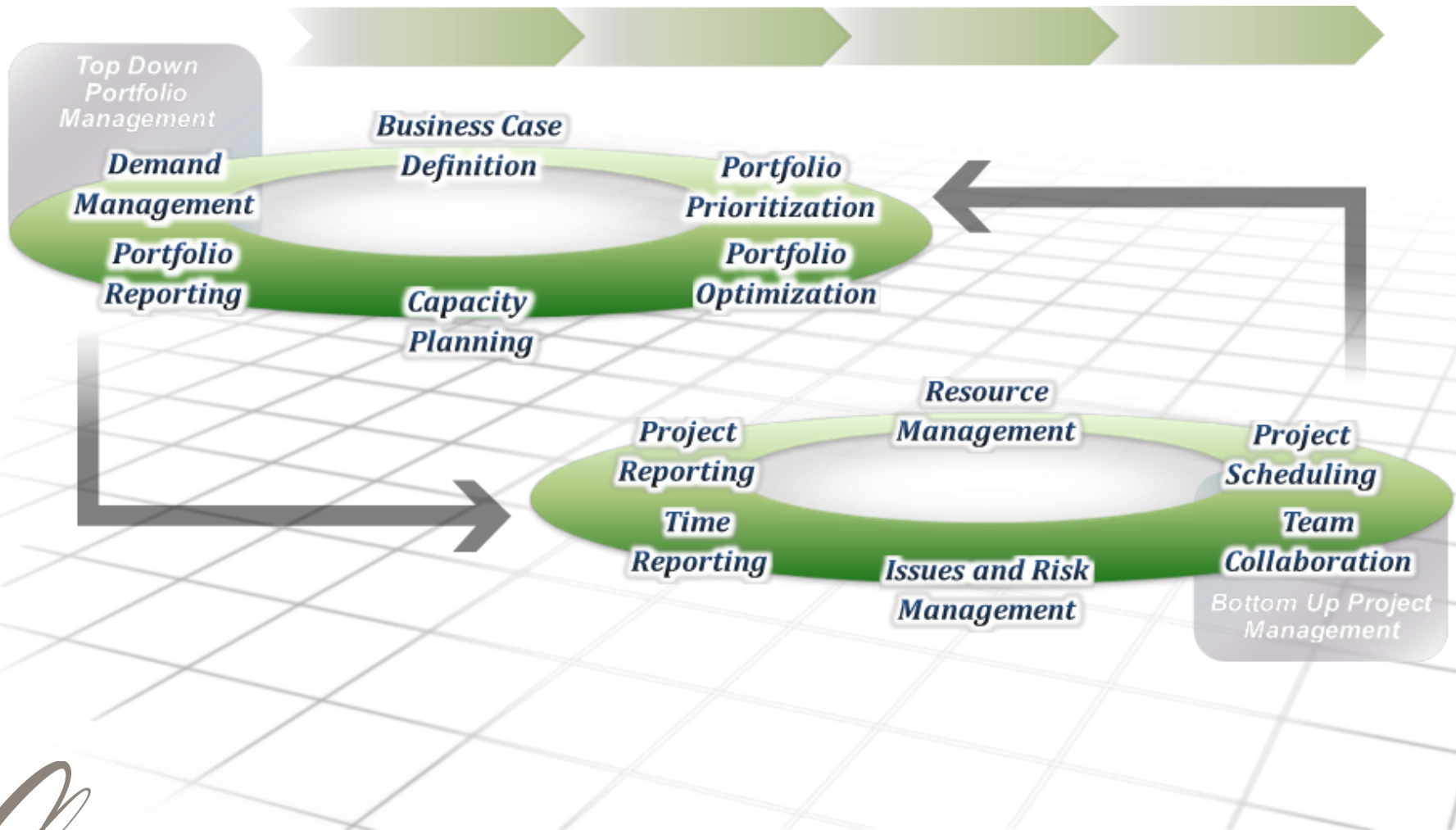
**Schedule Management** - Easily create and communicate both simple and complex project schedules

**Time and Task Management** - Simplify the collection of time and task status updates from team members

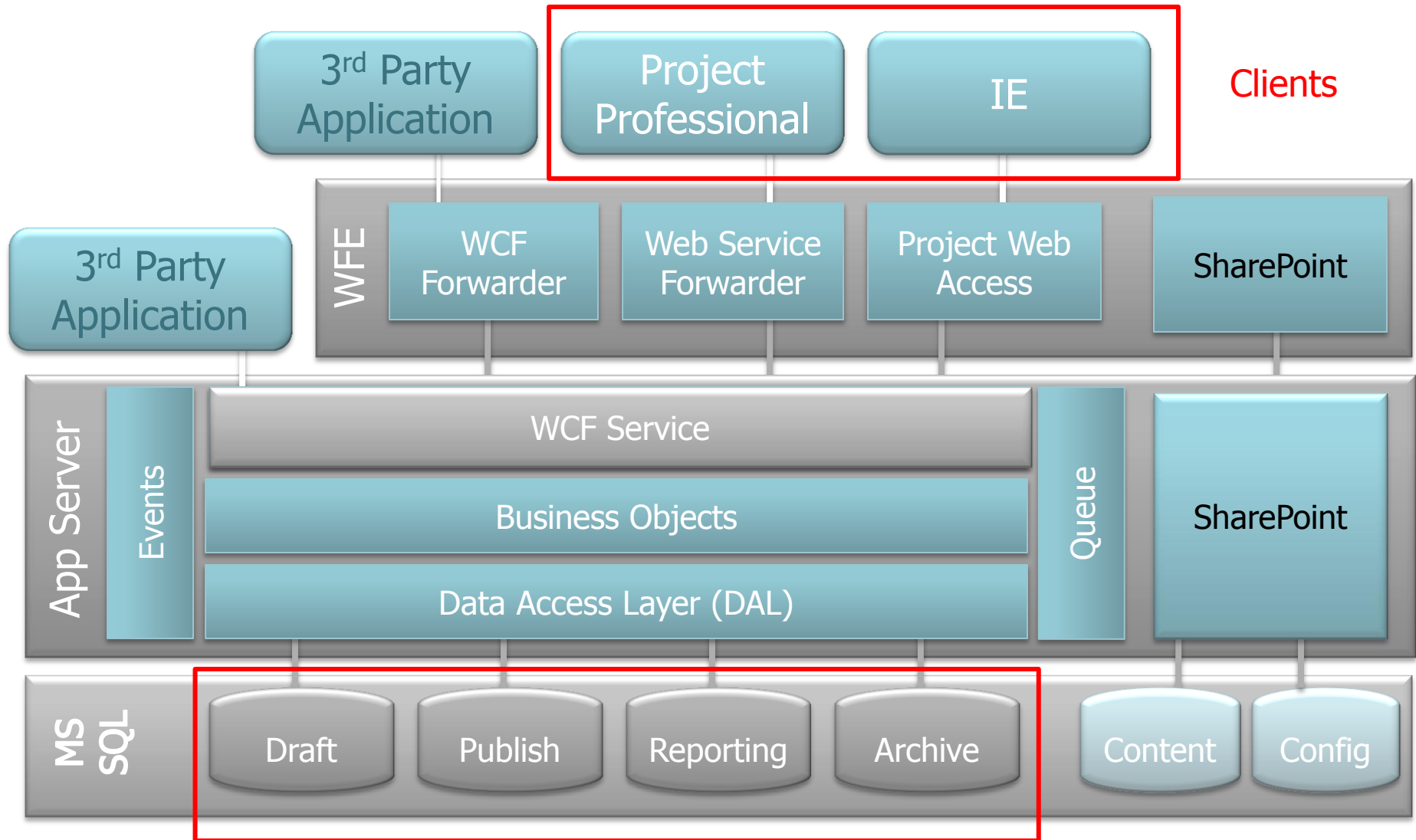
**Team Collaboration** - Better connect disparate teams to share information and drive collaboration

**Business Intelligence and Reporting** - Effectively measure project performance and gain visibility and control across all portfolios

# Microsoft EPM Solution Capabilities



# Project Server Architecture Overview

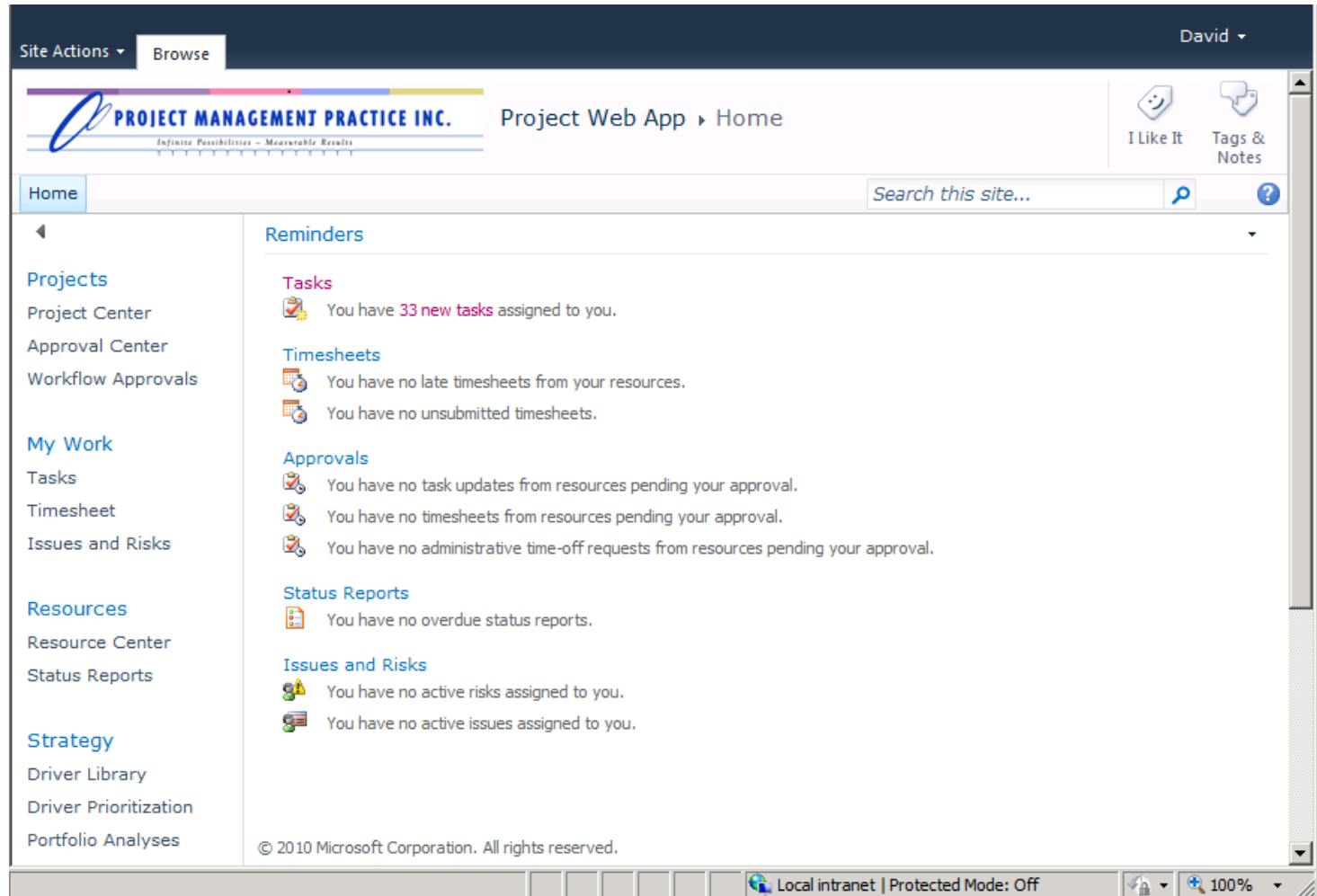


Project Data Storage



# Project Web App - Home Page

- ◆ The PWA Home Page is a personalized entry point to Project Server for every user
- ◆ Shows overview of items that have changed since the user last accessed PWA



# Project Center in PWA

The screenshot displays the 'Project Center - Project Web App' interface. The 'New' button is highlighted with a red box, and a callout box points to it with the text: 'New Project shows list of available Enterprise Project Types'. The 'New' dropdown menu is open, showing the following options:

- In Project Professional
- From SharePoint List
- Sample Proposal
- Basic Project Plan
- Large IT Project
- Small New Product
- Generic Project Plan
- Big Project

The main table displays project information, including Project Name, Start, Finish, PM Status, and Finish Status. The table is grouped by Owner.

Project Name	Start	Finish	PM Status	Finish Status
<b>Owner: David</b>				
Internal Software	6/1/2010	10/12/2010	Yellow Circle	Green Circle
Product 123	6/7/2010	8/13/2010	Green Circle	Empty Box
Product XYZ	6/7/2010	11/4/2011	Green Circle	Red Circle
Small Project	6/14/2010	8/10/2010	Red Circle	Empty Box
Web rollout	6/14/2010	8/10/2010	Green Circle	Green Circle
Workflow project	7/9/2010	7/9/2010	Green Circle	Empty Box
<b>Owner: Robert</b>				
Rob Project ABC	8/9/2010	10/5/2010	Green Circle	Empty Box
Rob Sample Proposal	8/9/2010	8/9/2010	Green Circle	Empty Box
Schedule Sample	8/9/2010	8/9/2010	Green Circle	Empty Box

# Project Proposal with Workflow

**Starts the Workflow and requires certain project information to be completed before going to the next stage**

**Workflow options and information required is determined by custom workflow phases and stages**

**Workflow Status**

**Current Workflow Stage: Initial Proposal Details**

In this workflow stage, summary information about the proposal needs to be entered. Press Save to save data without moving to the next stage. Press Save then Submit to save and submit the proposal for review.

**Workflow Stage Status**

One or more required fields have not been completed for this stage.

**Available Pages in this Workflow Stage**

Pages below may require attention. Click "Next" in the ribbon above to scroll through each page or select an individual page.

	Page Name	Status	Description
*	Proposal Summary	Incomplete	This section captures Summary information about the project.

Pages marked with '\*' require attention

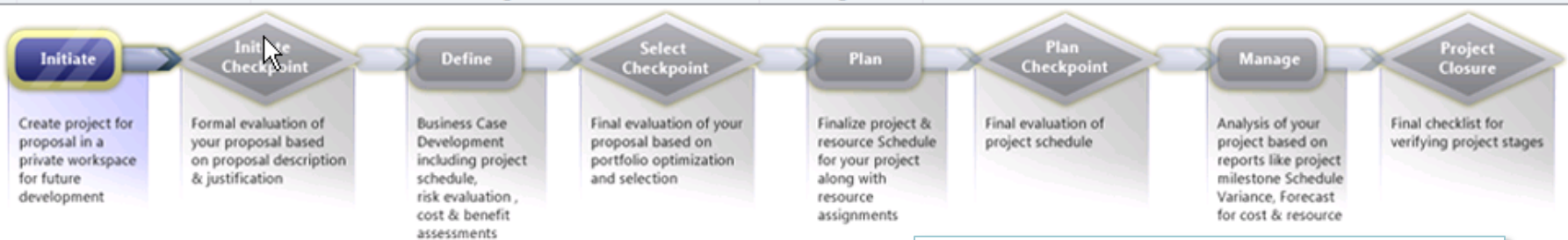
# Sample Workflow Stages

Close
Status
Submit
Options
Project Site
Build Team
Documents
Issues
Risks
Deliverables
Project Permissions
Resource Plan
Previous
Next

Workflow

Navigate

Page



## Workflow Status

### Current Workflow Stage: Initial Proposal Details

In this workflow stage, summary information about the proposal needs to be entered. Press Save review. Press Save then Submit to save and submit the proposal for review.

### Workflow Stage Status

All required fields for this stage have been filled.

### Available Pages in this Workflow Stage

Pages below may require attention. Click "Next" in the ribbon above to scroll through each page or select an individual page by clicking on it below.

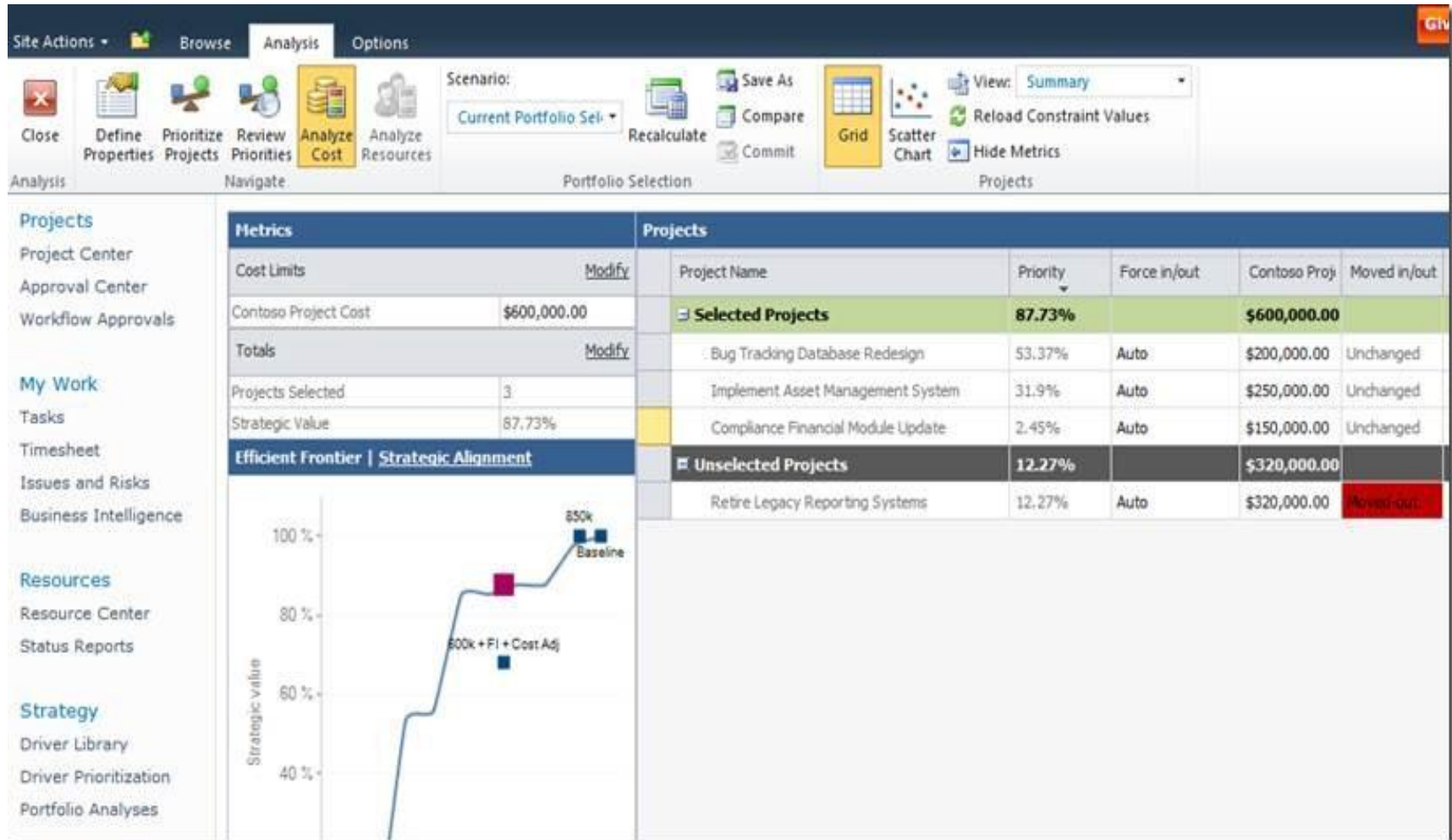
	Page Name	Status	Description
	Project Initiation	Complete	

Pages marked with '\*' require attention

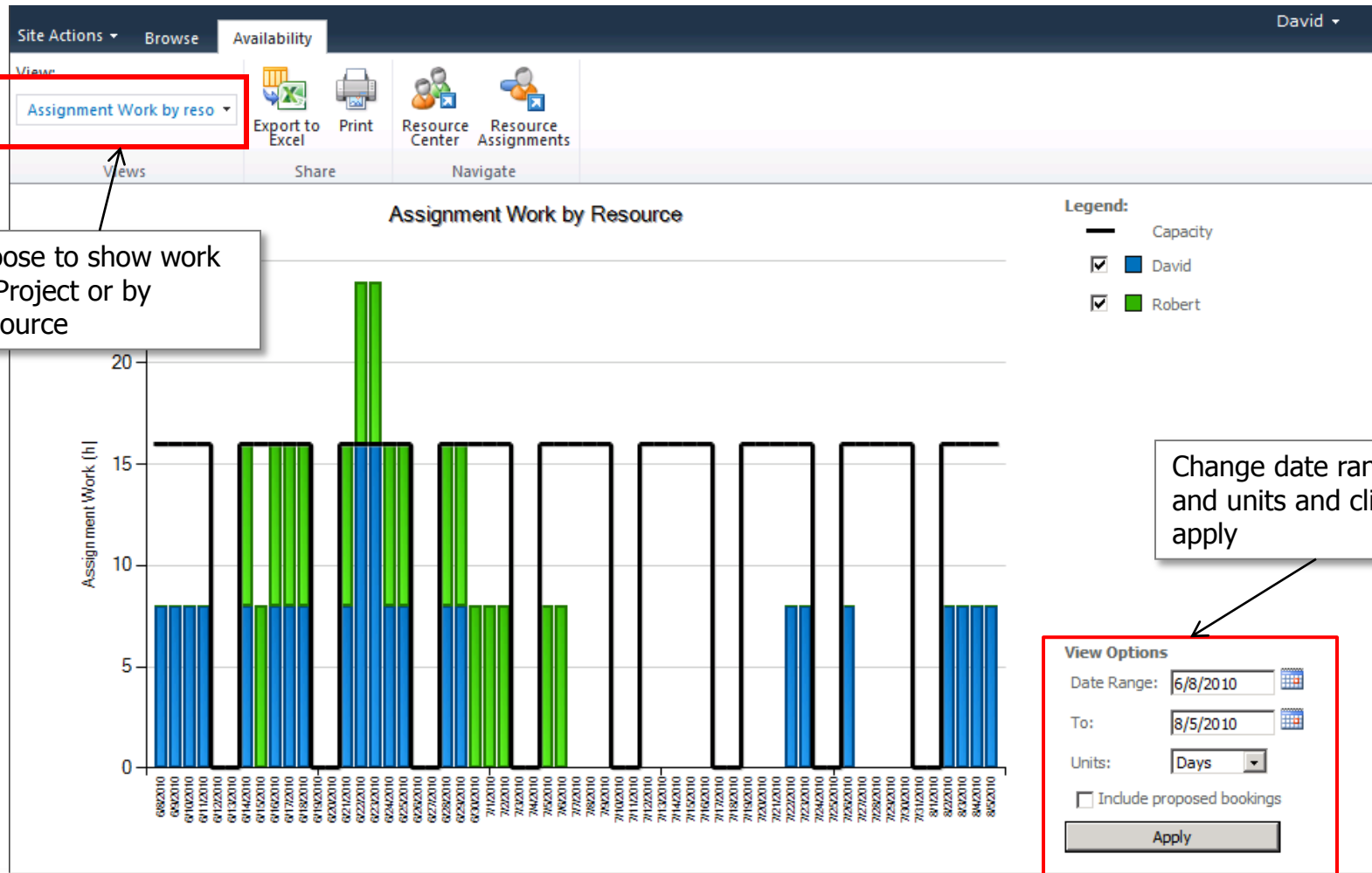
### All Workflow Stages

The Sample Workflow in Project Server automatically goes through Phases and Stages based on filling out required Project Data Page information.

# Portfolio Analysis



# Resource Availability



# Easily Submit Status

AM\frabinov

Site Actions | browse | Tasks

Save | Send Status | Insert Row | Import | Reassign | Remove Task | Prev

Submit

After entering status you can select the task and click to Save or Send % of Work complete back to the PM

My Assignments | No Filter | Project | Data

Layout | Units | Display | Zoom In | Zoom Out | Scroll to Task

Planned | Overtime | Comment on Submit | Show/Hide | Export to Excel | Print | View Calendar

Status: There are unsaved updates.

	Task Name	Finish	Remaining Work	% Work	Work	Actual Work	Process Status	Work
	Planning Window: In Prog	7/19/2011	8/4/2010	80h	104h	24h		Planned
	Project Name: Design a	7/19/2011	8/4/2010	80h	104h	24h		Actual
<input type="checkbox"/>	Do design work	7/19/2010	7/20/2010	8h	50%	16h	8h	Planned
<input type="checkbox"/>	Do more design work	7/21/2010	7/26/2010	16h	50%	32h	16h	Actual
<input checked="" type="checkbox"/>	Do Build work NEW	7/27/2010	7/30/2010	24h	25%	32h	8h	Planned
<input type="checkbox"/>	Do More Build Work	8/2/2010	8/4/2010	24h	0%	24h	0h	Actual

The Process Status column shows where in the Updating Process task information exists

Project Center | Approval Center | My Work | Tasks | Resources | Resource Center | Settings | Personal Settings | Server Settings



# Updating the Timesheet

**Submit Task status and/or Timesheet info**

**Select the period to apply non-working time in the future such as vacation**

**Timesheet includes current period tasks**

**Also Shows Administrative time classifications**

**Status:** In Progress (Pending Send Timesheet), **Total:** 0h, **Period:** 8/9/2010 12:00 AM - 8/15/2010 11:59 PM

Task Name/Description	Project Name	Billing C	Task Type	Mon 8/9	Tue 8/10	Wed
<input type="checkbox"/> Conduct preliminary stage review dec	Product XYZ	Standard	Actual			
<input type="checkbox"/> T 4 - Design/Document	Web rollout	Standard	Actual			
<input type="checkbox"/> T1 - Install	Web rollout	Standard	Actual			
<input type="checkbox"/> T2 - Analysis	Web rollout	Standard	Actual			
<input type="checkbox"/> T3 - Present Alternatives	Web rollout	Standard	Actual			
<input type="checkbox"/> T3 - Train	Web rollout	Standard	Actual			
<input type="checkbox"/> T4 - Support	Web rollout	Standard	Actual			
<input type="checkbox"/> Administrative	Administrative	Administrative	Actual			
<input type="checkbox"/> Sick time	Administrative	Sick time	Actual			
<input type="checkbox"/> Vacation	Administrative	Vacation	Actual			
<b>Total work</b>			Actual			



# Collaboration Essentials

- Project specific workspace sites
- Project Documents
- Issues and Risks
- Links

What ever you want!

Site Actions ▾ Browse Page

Master Project

Master Project

**Libraries**  
Project Documents

**Lists**  
Issues  
Risks  
Deliverables  
Calendar  
Tasks

**Discussions**  
Team Discussion

Recycle Bin  
All Site Content

## Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

### Deliverables

<input type="checkbox"/>		Title	Deliverable Start	Deliverable Finish
There are no items to show in this view of the "Deliverables" list. To add a new item, click "New".				
<a href="#">+ Add new item</a>				

### Issues

<input type="checkbox"/>		ID	Title	Assigned To	Status	Priority	Category	Due Date
There are no items to show in this view of the "Issues" list. To add a new item, click "New".								
<a href="#">+ Add new item</a>								

Microsoft  
**Project Server 2010**

#### Links

There are currently no favorite links to display. To add a new link, click "Add new link".

[+ Add new link](#)

# Sample KPI Dashboard



Business Intelligence Center ▸ Finance  
Central repository for all reports, dashboards and KPIs



Project Web Access

Home

Search this site...

Dashboards

Corporate Dashboard

HR

Sales & Marketing

IT

Finance

Operations

Legal

Data Connections

Documents

Sample Reports

Templates

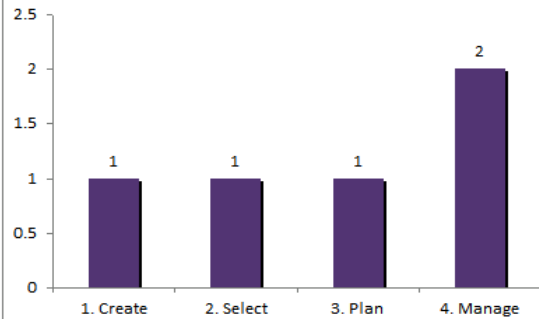
Site Pages

PerformancePoint  
Content

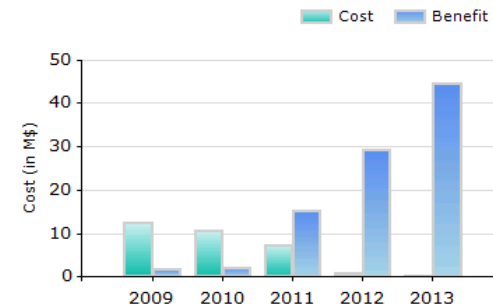
## Finance Department KPIs



### Projects by Phase



### Cost vs Benefits



### Projects KPI Status Report

Project Name	Owner	Cost	Resource	Schedule	Risk	Quality	Strategic Score	% Complete	Total Cost	Total Benefit
New Zen Report Module	Chris Gray	?	✓	✓	✓	✓	0.45	0%	\$600,000	\$2,110,000
ROI Calculation Matrix	Chris Gray	✓	✓	✓	✓	✓		0%	\$560,000	\$1,905,000



# What's New in Project 2010?

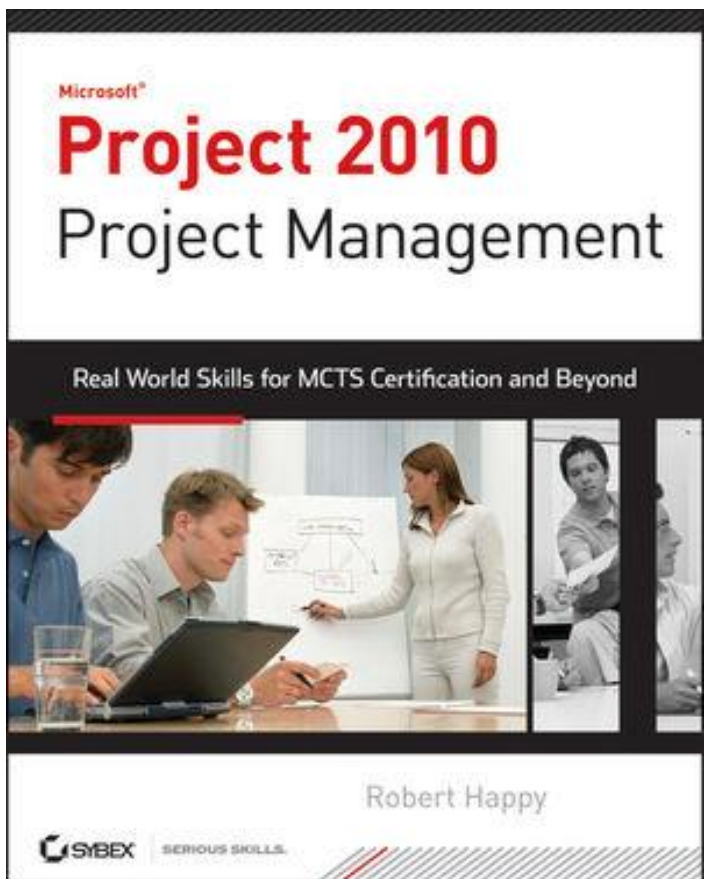
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- ◆ Improved Interface
  - ◆ Ribbon style commands to better support how you plan and manage schedules
  - ◆ Backstage for managing files and Project environment options
  - ◆ Most common commands are one click away
- ◆ User Controlled Scheduling
  - ◆ Choose to Manually schedule for an easy to use Excel like interface or take full advantage of the powerful schedule engine with Auto Schedule
  - ◆ Create Top-Down Summary Tasks that don't use roll-up for scheduling and even compare to details
  - ◆ Inactivate tasks to retain information without deleting (Professional Investment)

# What's New in Project 2010 (cont'd)...

- ◆ New Viewing Options
  - ◆ Timeline view to see the big picture – part of the default view
  - ◆ The Team Planner for resource management and drag and drop resources scheduling (Professional Investment)
  - ◆ New Gantt chart bar styles
  - ◆ Easier View Creation and Customization
- ◆ Better Analysis
  - ◆ 'Task Inspector' shows why a task is scheduled where it is and allows action to correct
  - ◆ Move Tasks to reschedule forward or back
  - ◆ Project Version comparison now includes Gantt bars
- ◆ Easier Collaboration and Sharing of Information
  - ◆ Sync with SharePoint lists (Professional Investment)
  - ◆ Save to PDF for easier sharing
  - ◆ Enhanced Copy and Paste

# Project 2010 Project Management



Get the most out of Microsoft's latest release of the popular project management tool, Project 2010, with this comprehensive guide from Author Robert Happy.

**ISBN:** 978-0470561102

**Price:** \$49.99

**Available:** August 2010

**Pages:** approx. 600

**Media:** CD, with videos, sample files, and PDF of book

Can be pre-ordered - from your favorite bookstore, including Amazon, Barnes&Noble, or check out

[www.sybex.com/go/happy](http://www.sybex.com/go/happy)

**Note:** Prepares Candidates for **Certification** Exam 70-178, Microsoft Project 2010, Managing Projects

# Video Based eLearning (CBT) Training for Project 2010

Offers 16 PDU (PMI) credits and prepares for Microsoft Project Certification Exam



When you purchase "Project 2010 Project Management: Real World Skills for Certification and Beyond" by Robert Happy, PMP, **save \$50 on the Project 2010 Core Essentials course.**

Get the most out of Microsoft Project 2010, with this **video-based**, on-demand training course from Project Management Practice, Inc and Keystone Learning Systems.

In this course Robert combines real-world examples and step-by-step instruction to equip you with the knowledge you need to effectively plan, track, and execute projects in Project 2010.

**Price:** \$449- \$399

**Available:** Now

**Includes:** 100 + lessons, Videos, Sample Files, Quizzes, Exercises, and complete KeyNotes.

**Media:** Online or DVD-ROM.

"I just finished taking your course on Microsoft Project Core Essentials, and absolutely loved it! I plan on sitting for my MCTS exam...Thank you once again for a fantastic class!"

*Unsolicited email from a certified PMP customer*

# Project Server Express “In a Box”

**Project Server Express “In a Box”** is our custom Microsoft Project Server 2010 deployment package designed to get your organization up and running fast (**in 10 business days**) with Project Server 2010 and for less than **\$25,000**.

The Microsoft Solution for Enterprise Project Management (EPM) aligns people, process, and systems, drawing business operations closer together.

In **10 business days** achieve:

- Central repository for all projects and resources
- Real-time visibility with meaningful views and reports
- Resource availability
- Resource allocation, and capacity planning
- Flexible reporting
- Project collaboration, and more.





# Thank You!

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## Questions & Answers

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[rhappy@pm-practice.com](mailto:rhappy@pm-practice.com)