

Additional Notes for Microsoft Project

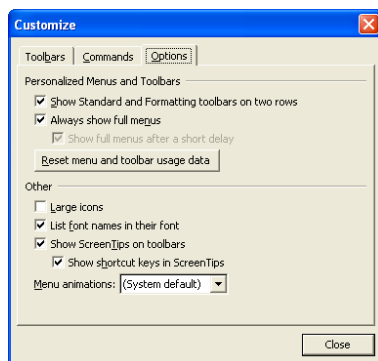
Mark Simon 2007

Customising the Environment

Accessing

Tools.Customize.Toolbars...

Recommended Options



- Show Standard and Formatting toolbars on two rows
- Always show full menus
- Show Screen Tips on toolbars
 - Show shortcut keys in Screen Tips

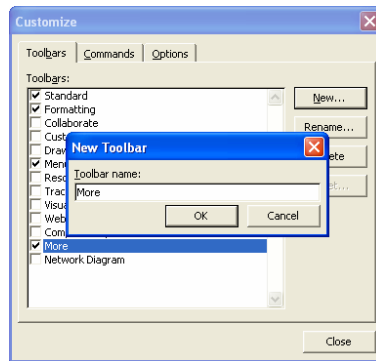
Office 2000 and before

- Standard and Formatting toolbars share one row
- Menus show recently used commands first (Short menus)

Custom Toolbars

Creating a Toolbar

1. Toolbars.New...



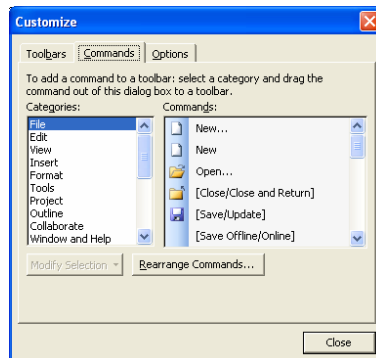
2. Name the toolbar

3. Double-Click the title to dock the toolbar:



Adding Items

1. Select Commands Tab



2. Drag an item from the Commands Pane to the Toolbar:



Make sure that you drag it *inside* the toolbar!

Useful Tools


Category

Command

View

View:		▼
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Window and Help

 [Split/Remove Split]
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Edit

 Delete Row
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Tracking

 Project Statistics...

Useful Options

Tools.Options...

View

Date Format: Mon 28 Jan '02

Show project summary task

Interface

Display Project Guide

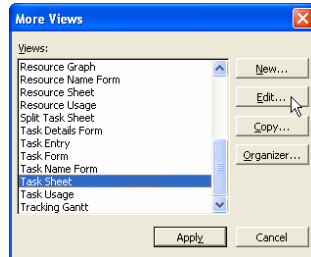
Schedule

Show assignment units as a: Decimal

Customised Views

Including the Task Sheet in the View Menu

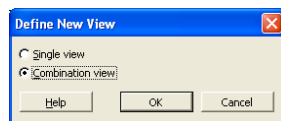
View.More Views ...



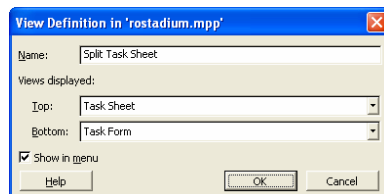
- 1 Task Sheet
- 2 Edit
- 3 Show in menu

Creating a Split Task Sheet View

1. New...



- 2 Combination view



2.

Name: Split Task Sheet

Top: Task Sheet

Bottom: Task Form

- Show in menu

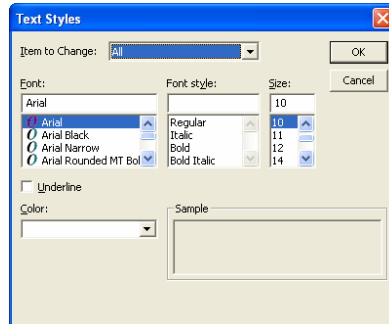
Switching Views

To switch from a split view to an unsplit view, hold down the **Shift** key while choosing the next view. (Only in the View Menu)

Changing Text Format (Task Sheet & Resource Sheet)

Method

Format.Text Styles ...



Item to Change: All

Choose Font, Style and Size

Useful Formats

Task Sheet

Critical Tasks

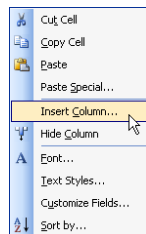
Milestone Tasks

Resource Sheet

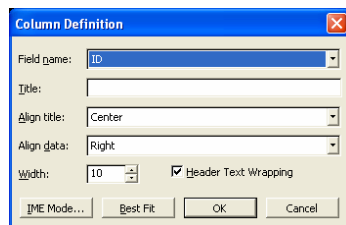
Allocated Resources

Inserting Columns in Task Sheet

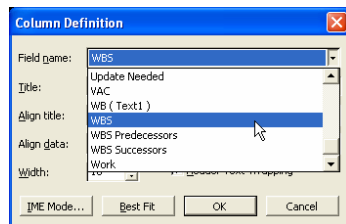
1. Right-Click on column header



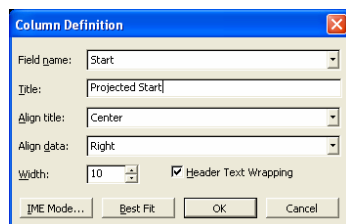
Select Insert Column...



2. Choose a Field



3. You can rename a column by entering a Title



Useful Columns

Task Sheet (Entry)	WBS; Work; Cost; Fixed Cost
Resource Sheet	Work; Cost
Task Sheet (Tracking)	Baseline Start & Finish; Start & Finish (Renamed to Projected)

Changing Resource Assignments

MS Project attempts to calculate the amount of work (effort) using the following formula:

$$\text{Work} = \text{Total Units} * \text{Duration}$$

Once a non-zero work value has been determined, MS Project will seek to keep the same values after the re-assignment.

Changing Resource Units

There are two main settings:

Fixed Work will keep the total work, and re-adjust the duration

Fixed Duration will keep the duration, and re-adjust the work

By default, tasks are set to Fixed Units. However, when you change the units, they behave as Fixed Work tasks.

eg

$$\begin{array}{rccccccc} \text{Work} & = & & \text{Units} & * & & \text{Duration} \\ 80 & = & & 2 & * & & 40 \end{array}$$

Increasing the Units to 3:

Fixed Work (Units) \equiv Less Time

$$80 = 3 * 26\frac{2}{3}$$

Fix Duration \equiv More Work

$$120 = 3 * 40$$

Adding Resources

By default, Tasks are Effort Driven, which means that additional resources share the overall total work. This will result in reducing the duration.

$$\begin{array}{rclcl} \text{eg} & \text{Work} & = & \text{Units} & * & \text{Duration} \\ & 80 & = & 2 & * & 40 \end{array}$$

Adding 1 unit of a new resource:

Effort Driven \equiv Shared work

$$53\frac{1}{3} = 2 * 26\frac{2}{3}$$

$$26\frac{2}{3} = 1 * 26\frac{2}{3}$$

80

Effort Driven \equiv More work

$$80 = 2 * 40$$

$$40 = 1 * 40$$

120

Summary

If you are adding or remove resources, check Effort Driven.

If you are changing resource unites, check Task Type.

Avoiding Calculation Issues

You will probably find that it is much easier to calculate the Work hours yourself and enter both the units and work. As long as they fit in the allocated availability (that is, your total work for a resource does not exceed units * max units), Project will accept your changes.

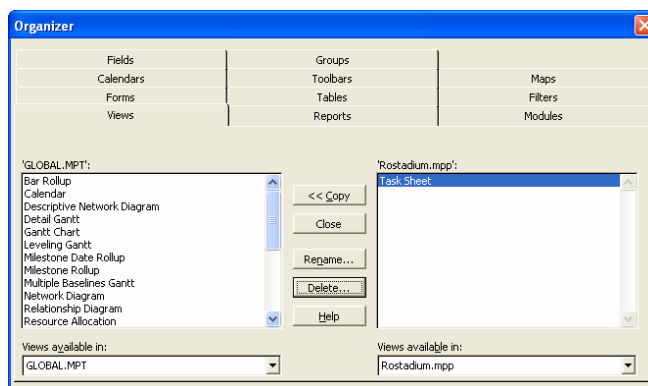
Elapsed Lag Time

Entering an elapsed lag time of 100eh will finish 4 hours (100 - 4*24) later. If this is during the night (non-working hours) the next task will not commence till the following working time.

However if the elapsed time finishes during working hours, the next task will follow immediately. This may cause problems with your scheduling.

Keeping your Settings

Tools.Organizer...



This allows you to copy your settings between the project file and the GLOBAL.MPT.

- 1 Select a tab.

Select an item in one of the windows.

Copy

Useful settings:

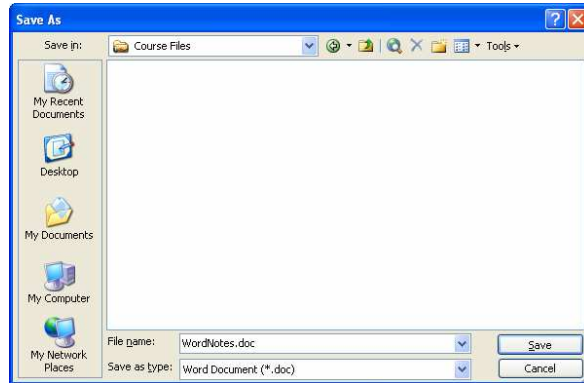
Views	Task Sheet; Resource Sheet
Tables <input checked="" type="radio"/> Task	Entry; Tracking
Tables <input checked="" type="radio"/> Resource	Entry
Toolbars	(Your personal toolbar)

Note that the new Toolbar will normally be created in your global.mpt file, while the table views will be created in your document.

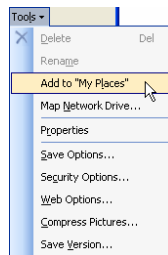
Shortcut to your Directory

You can either use the Save As... or Open... dialog for this.

File.Save As... (File.Open...)



Tools.Add to "My Places"



The icons in the left are still large, so you might select small icons:

Right-click.Small Icons

