

MICROSOFT PROJECT BASICS WORKSHOP QUICK REFERENCE CHECKLIST

MICROSOFT PROJECT “GLOBAL” SETTINGS (prior to starting any projects)

Review Options	<p>Carefully review the Microsoft Project Options (under Tools, Options) with particular attention to the following:</p> <p>View: Set Date format to “Jan 28 ‘02” if you are working with team members in other countries.</p> <p>Select “Project summary task” to roll up the project automatically.</p> <p>General: “Default standard rate” is the hourly rate applied to all new resources.</p> <p>Calendar: “Hours per day” sets the defaults used for scheduling work.</p> <p>Schedule: “Default task type” determines whether Work, Duration or Units is the default.</p> <p>Calculation: “Automatic” calculation option keeps the plan up-to-date constantly.</p> <p>“Actual costs are always calculated by Microsoft Project” specifies that Project calculates actual costs automatically.</p>	<input type="checkbox"/>
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PREPARING THE PROJECT MODEL (for each project undertaken)

Create a ‘Project Calendar’	<p>Ensure that you have a Project Calendar set that determines working and non-working days for the project. Make sure you set non-working days for company recognized and public holidays. Otherwise, you will be behind schedule from the start of the project.</p> <p><i>Go to “Tools, Change Working Time” to access the Project Calendar.</i></p>	<input type="checkbox"/>
Set ‘Project Information’	<p>Ensure that you have set the Start Date of your project and selected the default Project Calendar. If you have multiple projects that share resources, you can also set a Project Priority here.</p> <p><i>Go to “Project, Project Information” to access the Project Information.</i></p>	<input type="checkbox"/>
Build the Project Model	<p>Build the complete project model by entering Tasks, Estimates, Dependencies, Deadlines and Constraints, Resources, and Assignments.</p>	<input type="checkbox"/>
Level Resources	<p>Fix resource over-allocation by leveling resources on your project.</p> <p><i>Go to “Tools, Level Resources...” to access Resource Leveling.</i></p>	<input type="checkbox"/>
Optimize the Schedule	<p>Optimize your schedule for time and cost by reviewing the critical path and high cost tasks.</p> <p><i>To find the critical path on your project, run the “Gantt Chart Wizard” (accessible on the Format Toolbar) and select Critical Path.</i></p>	<input type="checkbox"/>
Set the Baseline	<p>Set the baseline to capture the originally scheduled start and finish dates, durations, work, and cost estimates. This will be your primary reference point against which you measure changes in your project. Use the “Tracking Gantt” View to see the baseline.</p> <p><i>Go to “Tools, Tracking, Set Baseline” to save the baseline for your project.</i></p>	<input type="checkbox"/>

UPDATING AND TRACKING (perform regularly while project is in progress)

Track Progress	<p>Choose your update strategy. If you are not using timesheets, it is recommended that you update ‘Actuals’ at a task level. For example, to prepare and update the schedule complete these steps:</p> <ol style="list-style-type: none"> 1. Set project Status Date (“Project, Project Information”). 2. Enter hours in “Actual Work” and “Remaining Work” columns (or equivalent Durations). 3. Update the schedule to reflect ‘Actuals’ (“Tools, Tracking, Update Project, Reschedule uncompleted work to start after:”). 4. Level Resources (“Tools, Level Resources...”). 	<input type="checkbox"/>
Maintain the Baseline	<p>Update the baseline if you add new tasks. Do NOT update the baseline for the entire project, but rather for selected tasks.</p> <p><i>Go to “Tools, Tracking, Set Baseline” to maintain the baseline for your project.</i></p>	<input type="checkbox"/>
Report Project Status	<p>Create effective status reports from Microsoft Project by customizing Views and their settings for printing. Also use the ‘Copy Picture’ function to include a snapshot of the schedule. For team members with little knowledge of project schedules, try printing a To-Do list in the Calendar View and filter it for each resource. Insert company logo into the Header for each View and customize project data to be included.</p>	<input type="checkbox"/>