

## Project Management: Intermediate Microsoft Project 2010

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This document includes instructions for managing resources, updating project plans, and designing visual reports.

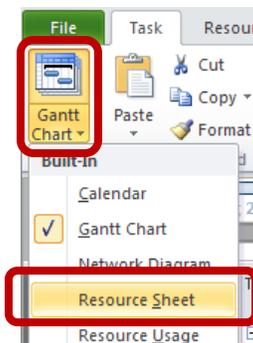
### Managing Resources in a Project

#### *Creating a Resource Calendar*

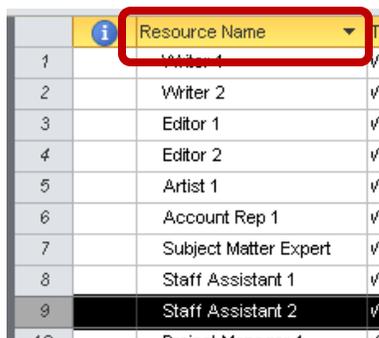
A resource calendar is a calendar created for a particular resource (or employee). By creating resource calendars, managers are able to directly change a resource's working hours, dates they are available to work on a project, and scheduled time-off.

To create a resource calendar,

1. Under **View** on the **Task** tab, select **Resource Sheet**.



2. Under **Resource Name**, double click the resource for which you wish to edit information.

A screenshot of the Resource Sheet table in Microsoft Project 2010. The table has columns for ID, Resource Name, and a status column. The 'Resource Name' column header is highlighted with a red box. The table contains the following data:

ID	Resource Name	Status
1	Writer 1	WA
2	Writer 2	WA
3	Editor 1	WA
4	Editor 2	WA
5	Artist 1	WA
6	Account Rep 1	WA
7	Subject Matter Expert	WA
8	Staff Assistant 1	WA
9	Staff Assistant 2	WA
10	Project Manager 1	WA

3. In the **Resource Information** box, select **Change Working Time**.

The screenshot shows the 'Resource Information' dialog box with the 'General' tab selected. The 'Resource name' is 'Staff Assistant 2' and 'Initials' is 'S'. The 'Group' is 'Internal'. The 'Booking type' is 'Committed' and 'Type' is 'Work'. The 'Change Working Time ...' button is highlighted with a red box.

4. Select the day to view the working times for the resource.

The screenshot shows a calendar for October 2011 with the 13th selected. A pop-up window titled 'Working times for October 13, 2011:' is shown, listing working times: 8:00 AM to 12:00 PM and 1:00 PM to 5:00 PM. The pop-up window is highlighted with a red box.

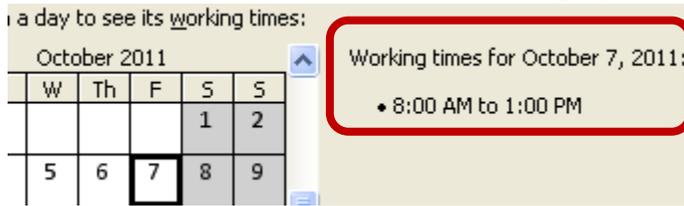
5. To edit the working time for a resource, select a date on the calendar, click the **Work Weeks** tab and select **Details**.

The screenshot shows the 'Work Weeks' tab in the 'Exceptions' dialog box. A table with columns 'Name', 'Start', and 'Finish' is shown. The first row has 'Name' as '[Default]', 'Start' as 'NA', and 'Finish' as 'NA'. The 'Details...' button is highlighted with a red box.

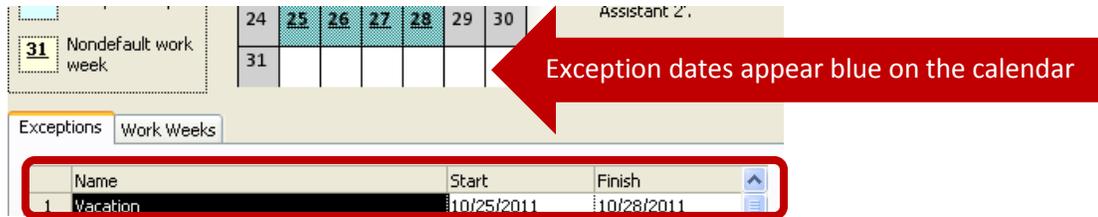
6. Under **Select Days**, hold down the **Ctrl** key to select multiple days of the week for which you wish to set a working time. Choose **Set day(s) to these specific working times** and double click in the **From** cell to enter the beginning time, then double click in the **To** cell to enter the ending time. Click **OK**.

The screenshot shows the 'Details for [Default]' dialog box. The 'Select day(s)' list is highlighted with a red box. The 'Set day(s) to these specific working times' radio button is selected and highlighted with a red box. The table shows 'From' as '8:00 AM' and 'To' as '1:00 PM'.

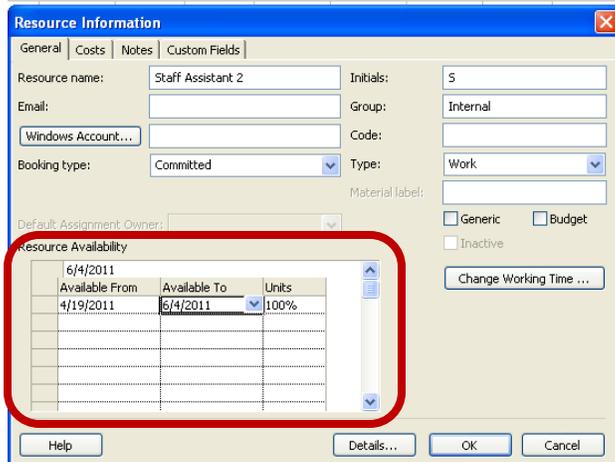
- The selected days of the week will now display the new working time.



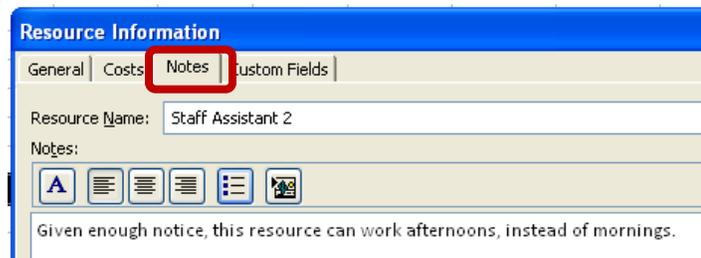
- Under the **Exceptions** tab, users are able to enter specific date(s) off for the resource. Enter a **Name** for the exception, and the **Start** and **Finish** dates.



- To change the availability of a resource, in the **Resource Information** box, under **Resource Availability**, enter the dates a resource is **Available From** and **Available To**.



- To enter a **note** pertaining to the working times of the resource, select the **Notes** tab, enter the note, and click **OK** to add the note to the resource.

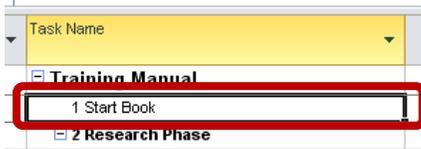


### Assigning Resources to Tasks

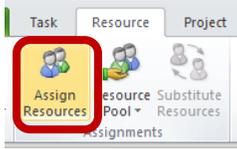
To assign resources to tasks,

- Display the **Gantt Chart** view.

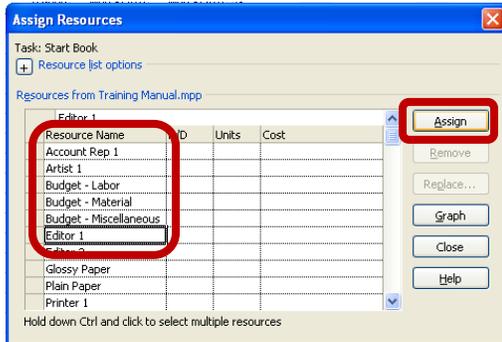
2. Under the **Task Name** field, click to highlight the selected task for which you wish to assign resources.



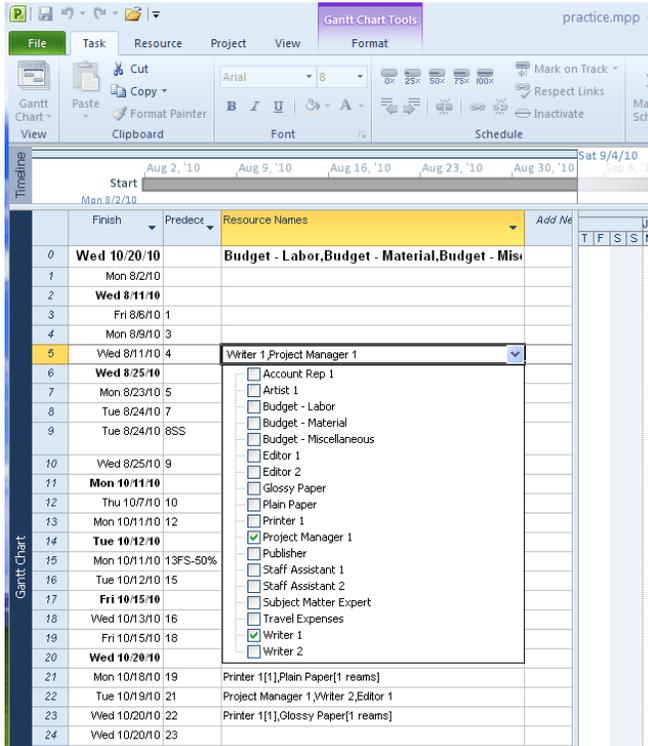
3. Under the **Resource** tab in the Ribbon, select **Assign Resources**. For a shortcut, click **Alt+F10**.



4. Under **Resource Name**, select the resource you wish to assign to the specific task. To select multiple resources, hold the **Ctrl** key. Click **Assign**.



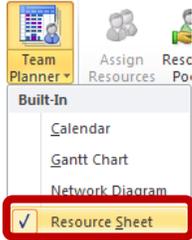
5. Resources can also be added via the **Resource Names** column in the **Gantt Chart**.



## Entering Costs

To enter cost information for **work resources**,

1. Choose **Resource Sheet** view.

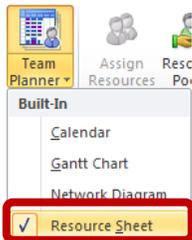


2. Under the **Standard Rate (Std. Rate)** column for the resource chosen, enter the payment per hour and click **Enter**.

Std. Rate
% \$0.00/hr
% 25.00

To enter the costs for **material resources**,

1. Choose **Resource Sheet** view.



2. Under the **Standard Rate (Std. Rate)** column for the *material* resource chosen, enter the standard rate for the resource and press **Enter**.

Glossy Paper	Material	reams	G	External	\$7.50
Plain Paper	Material	reams	P	External	\$5.00
Printer 1	Material		P	External	\$500.00

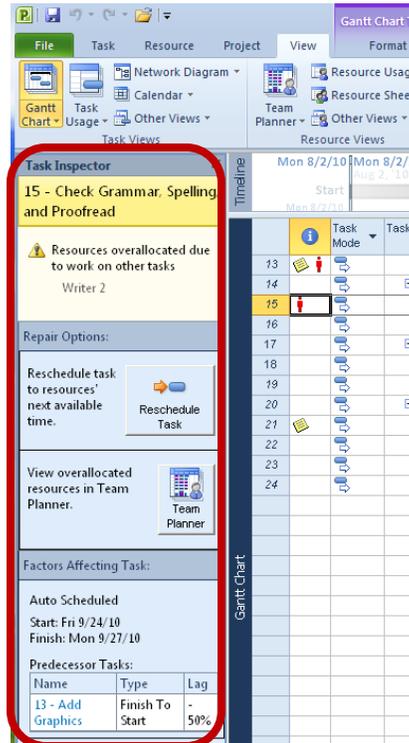
## Resolving Conflicts

After resource information is entered and resources are assigned to tasks, conflicts may occur if a resource is overscheduled. *Leveling* is a way to resolve conflicts by delaying or splitting tasks.

To see if a resource is overallocated on the **Resource Sheet**, look for the resources highlighted **red** with an exclamation point in the indicators column. In the **Gantt Chart** view, a **red person**

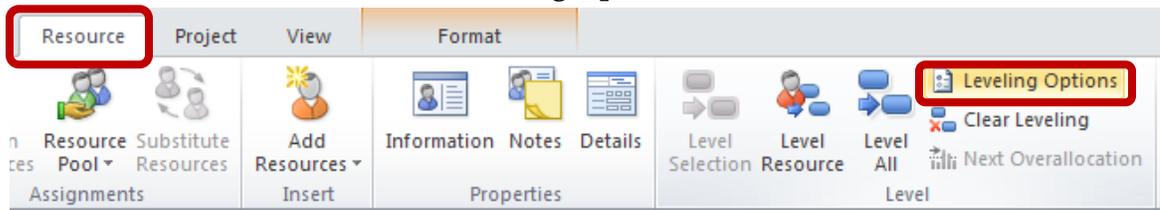
appears in the indicator column when a resource is overallocated. Right-click the indicator and choose **Fix in Task Inspector** to see options for resolving the conflict.

Task ID	Task Name	Duration
6	3 Outline Phase	5 days
7	3.1 Create Outline	3 days
8	3.2 Present to Publisher	1 day
9	3.3 Review with Subject	1 day
10	3.4 Revise Outline	1 day
11	4 Development Phase	26.54 days
12	4.1 Write Content	25 days
13		
14	5 Edit Phase	1.75 days
15	5.1 Check Grammar, Spe	0.75 days
16	5.2 Check for Technical	1 day
17	6 Review Phase	2 days
18	6.1 Approve Editing Char	1 day
19	6.2 Meet with Editor	1 day

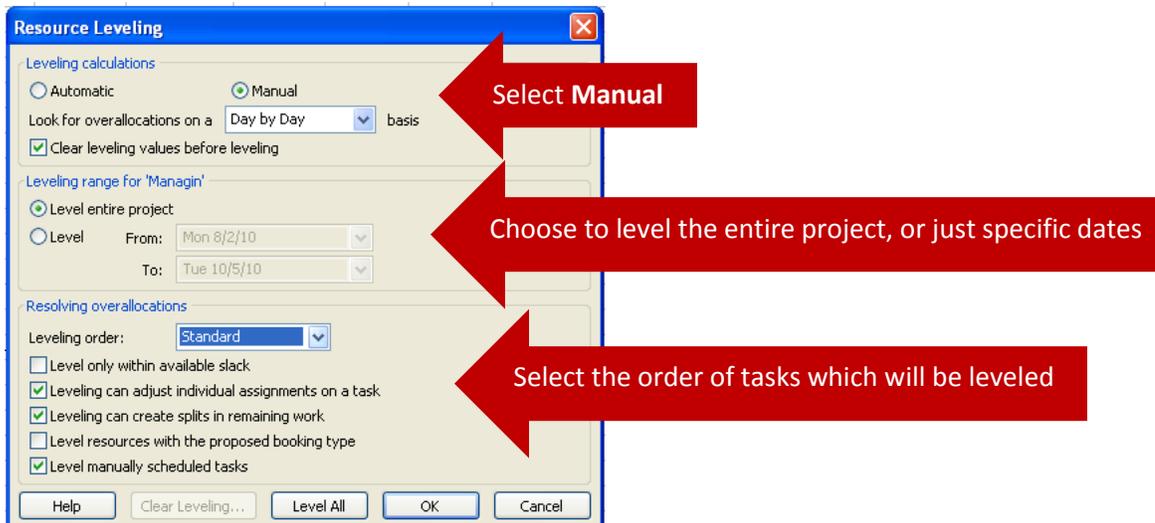


To resolve resource conflicts by using leveling,

1. Click the **Resource** tab, and select **Leveling Options** in the **Level** box.



2. Make the necessary choices for leveling, and click **Level All**.



3. Review the changes in the **Leveling Gantt Chart** view, and save the file if you wish to keep the changes.

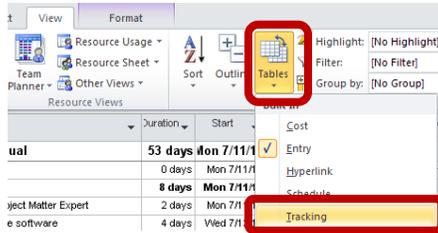
## Updating a Project Plan

### Entering Task Progress

Entering task progress information helps to view task progress and determine if the project and its tasks remain on schedule.

To enter task progress information,

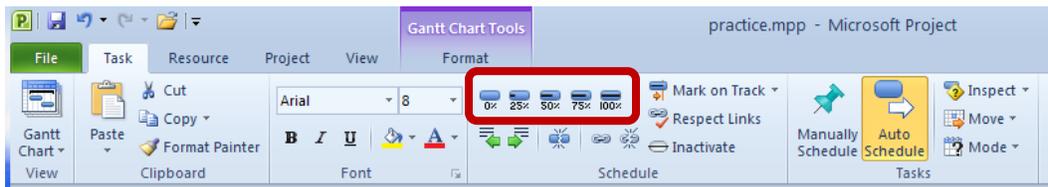
1. On the **View** tab, choose **Tables**, then **Tracking**.



2. Choose the task that is to be updated, and in the **% Complete** column, enter the appropriate % of completion.



Tasks can also be updated on the **Task** tab by clicking the appropriate % Complete button.



### Working with Overtime

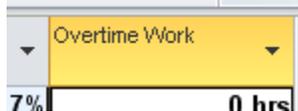
Extra hours of work put in by employees outside of their regular hours can be entered for work resources. To enter overtime work,

1. Under the **View** tab, choose **Task Usage**.

- Click the arrow next to **Add New Column**.



- Scroll to select **Overtime Work**.



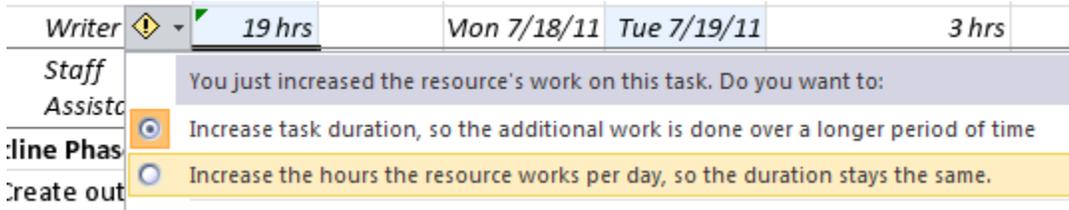
- Enter the **Overtime Work** for the resource.

Task Name	Work	Duration	Start	Finish	Overtime Work
CSS Training Manual	576 hrs	52 days	Mon 7/11/11	Wed 9/21/11	3 hrs
Writer 1	0 hrs	0 days	Mon 7/11/11	Mon 7/11/11	3 hrs

- After adding the overtime work, the total hours of work for the resource will remain unchanged. Increase the total hours of work for the resource to include the overtime work.

Writer	19 hrs	Mon 7/18/11	Tue 7/19/11	3 hrs
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- An **Exclamation** will then appear next to the resource name. Click the **Exclamation point** and choose the desired option.

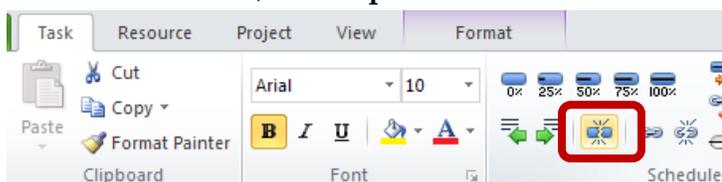


## Editing Tasks

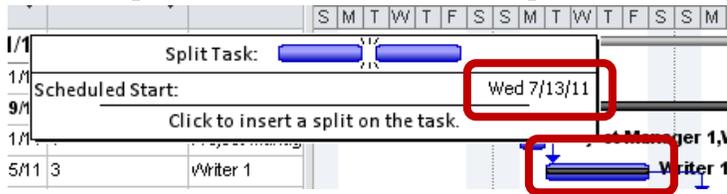
There are various ways to account for any changes that may abruptly occur during a project that will affect the completion of tasks. If a project is interrupted by an unexpected event (for example, weather conditions) then a task can be split to account for this change.

To split a task,

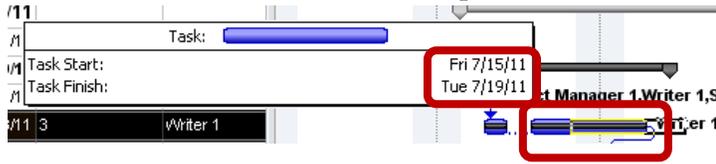
- Select the task.
- Under the **Task** tab, select **Split Task**.



- In the **Gantt chart** view, place the split-task cursor over the taskbar you want to split. Move the cursor along the taskbar until the date on which the task is to be split appears. **Click** to split the taskbar with an interruption of **one day**.



- To make the interruption more than one day, place the cursor on the **right side** of the split task in the Gantt chart. When a **four-sided arrow** appears, hold down and drag the bar to increase the duration interruption. The dates will change as you drag the cursor.



Another option is to make tasks *inactive* and *active*. An inactive task is a task that was cut from the project, but does not actually disappear, so it will still appear on the project record to be used for future reference.

To inactivate a task,

- Select the task you wish to inactivate, and **right click**. Choose **Inactivate task**.



- The task will remain to appear on the project, but will have a line through it indicating it is inactive.



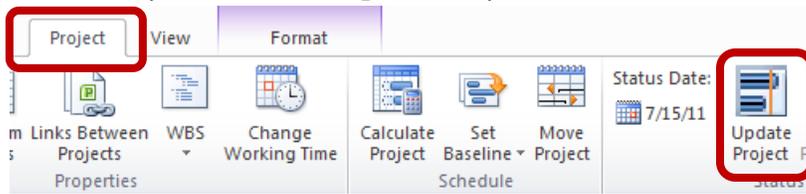
- To **reactivate** the task, **right click** on the task and **uncheck** the **Inactivate Task** option.

### Rescheduling Tasks

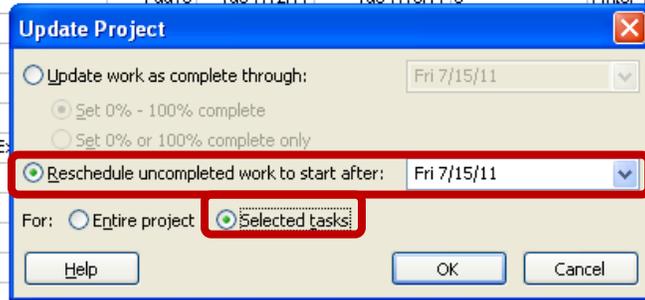
To reschedule a task,

- Select** the task that is to be rescheduled.

2. On the **Project** tab, select **Update Project**.



3. Choose **Reschedule uncompleted work to start after**, and select the date the work will begin again. Choose for **Selected tasks**, and click **OK**.

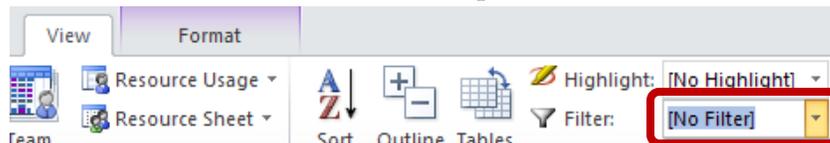


### Filtering Tasks

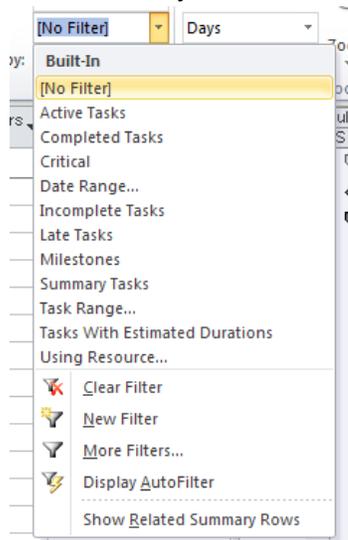
Tasks can be filtered to display only those that meet a given certain criteria. It allows managers to easily locate a problem without having to search through the entire project.

To filter a task,

1. On the **View** tab, click the **Filter** dropdown menu.



2. Choose how you wish to filter the data.



Filter by various characteristics, including **Date Range, Late Tasks, Incomplete Tasks, Active Tasks, etc.** Enter the requested information in the dialog box and click **OK**.

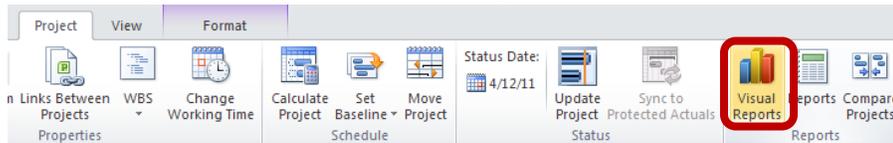
## Reporting Visual Data

### *Creating a Visual Report*

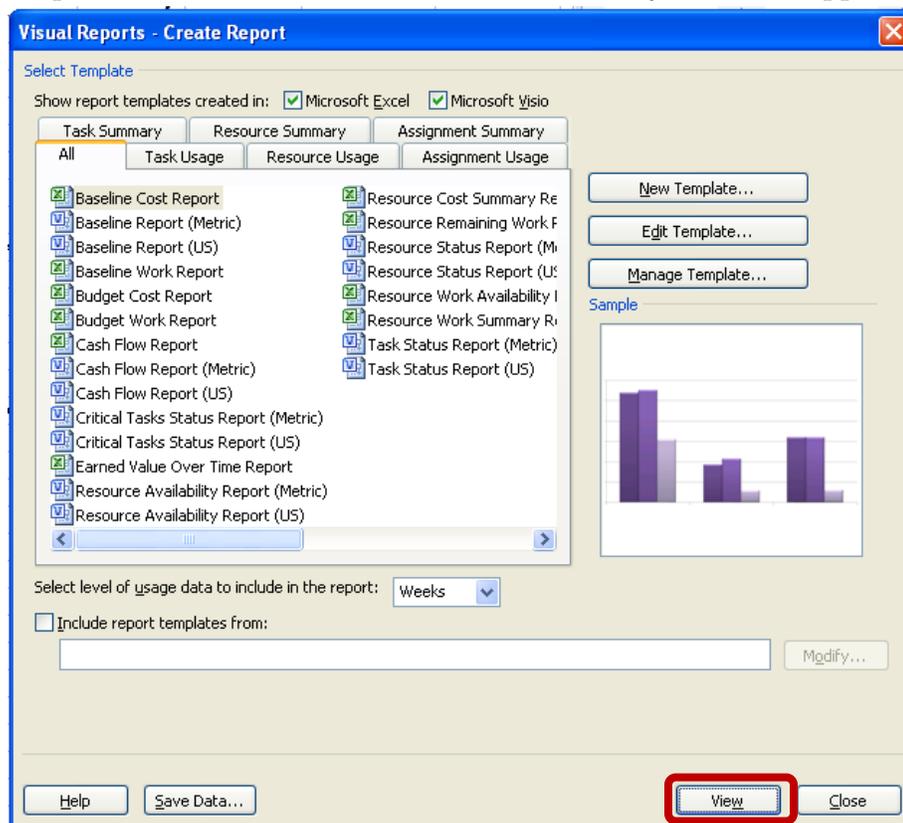
Visual Reports are graphical representations of the data in your project. They are created as charts and tables in either Excel or Visio.

To create a Visual Report,

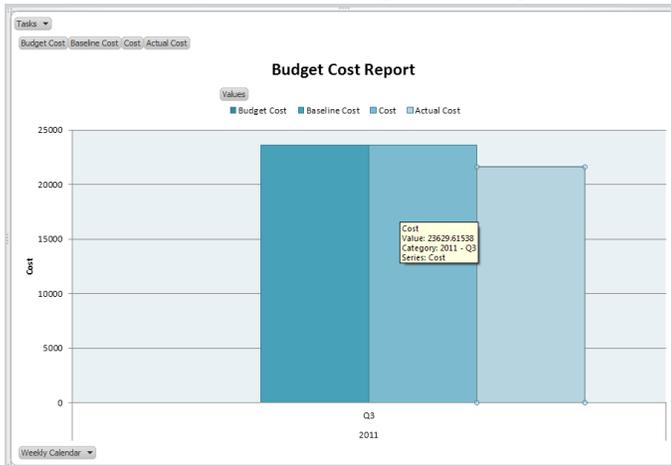
1. On the **Projects** tab, choose **Visual Reports**.



2. Under the **All** tab, select the desired visual report template. Under **Select level of usage** dropdown menu, choose the duration of the data you wish to appear in the report.



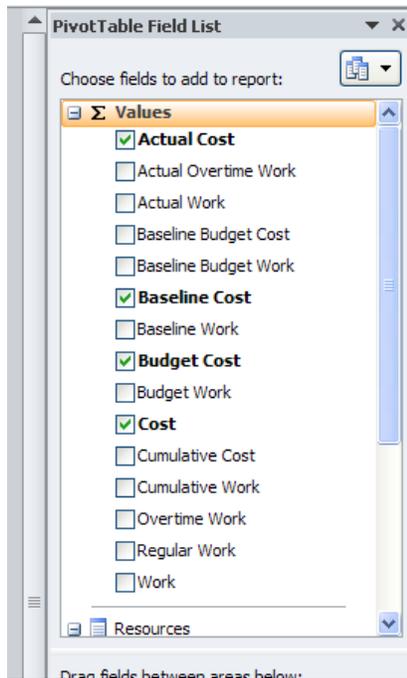
3. Click **View** to generate the report and open it.



### Customizing a Visual Report

To customize a Visual Report in Excel,

1. Generate the selected visual report and display it in Excel.
2. Click on the **Chart** to display the different editing properties.
  - a. Use the **PivotTable Field List** to edit fields to add to the report.



Check the boxes next to the fields you wish to add to the chart. As you check and uncheck them, the chart will automatically reflect the changes.

- b. On the **Layout** tab, adjust the options as desired.

