Microsoft Project Professional 2007
and
Project Server 2007

Tips & Tricks

Table of Contents

Introduction

The purpose of this document is to describe some of the key functionality in MS Project Professional 2007 and Project Server 2007 that differentiates it from former stand alone versions of the software. The key changes are presented as “Tips”.

Tip #1: Task Drivers

The **Task Drivers** pane provides information about what factors are affecting the task’s start date, such as duration, calendars, and constraints of predecessor and successor tasks. The Task Drivers pane is a new feature in MS Project 2007.

To view the **Task Driver** pane, click on the following icon or go to Project > Task Drivers:

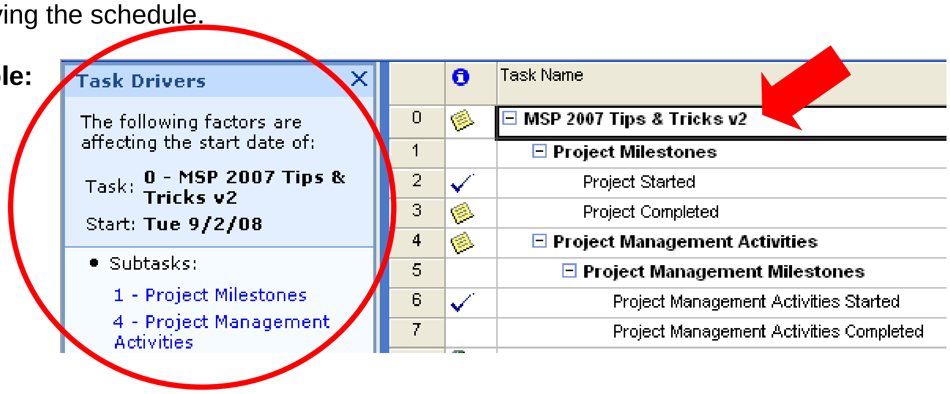
Information Displayed in Task Pane

In addition to the task name and start date, the following information is displayed in the **Task Drivers** pane, as applicable.

Summary Tasks & Subtasks

If you selected a summary task, the **Task Drivers** pane displays the subtasks and summary tasks that are driving the schedule.

Example:



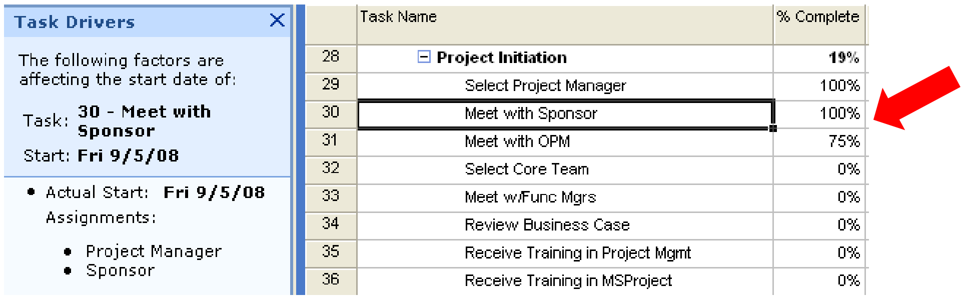
Notes:

❖ You can click different tasks without closing the **Task Drivers** pane. The **Task Drivers** pane always displays the scheduling drivers for whatever task is selected.

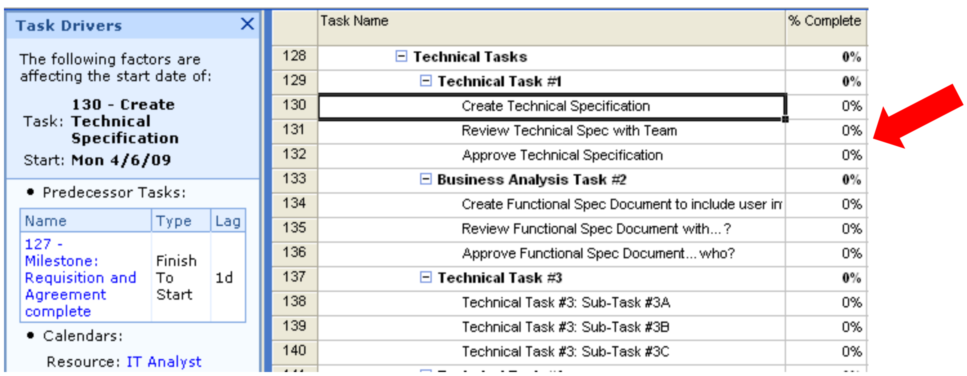
Actual Start & Assignments

If a task is updated to reflect Actual Dates, the actual start date is displayed, together with the data that initiated the task.

Example: In-Progress or Complete Task.



Example: Future Task.



If a Task Calendar is assigned, this will be displayed as well.

Predecessor Tasks

If you linked your tasks, the predecessor tasks will be displayed in the **Task Drivers** pane with their constraint types and the amount of lag time or lead time built in. You can click the name of a predecessor task to see its drivers.

Example: See the above example. Note “Type” and “Lag” are displayed. When the predecessor task (in blue) is clicked, MS Project 2007 takes the user to the predecessor task and displays its Task Drivers.

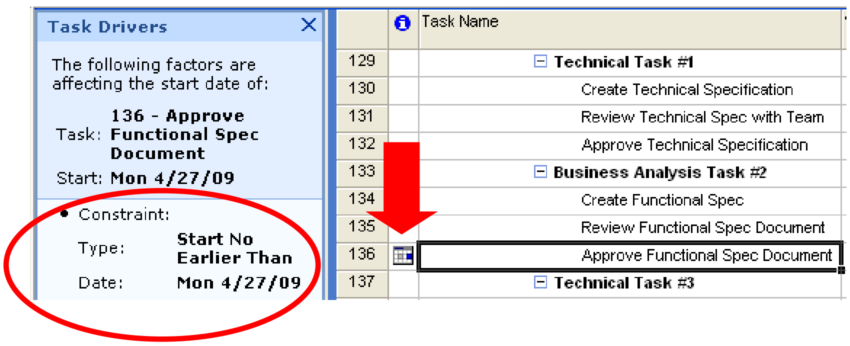
Calendars

If the working time that is outlined on the calendar for the selected task is affecting the task's schedule, the name of the calendar is displayed in the **Task Drivers** pane.

Example: See the above example. When the Resource Calendar name (in blue) is clicked, MS Project 2007 displays information about its working and nonworking time. If a Task Calendar is also assigned to the task, it will appear here.

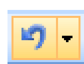
Constraint Type and **Date**
The **Task Drivers** pane displays the type of constraint that is currently placed on the task, including the date associated with the constraint.

Example:



Leveling Delay
If you applied leveling to help balance the resource workload, your tasks may be delayed to prevent over-allocation. The **Task Drivers** pane displays the amount of time by which the selected task is delayed because of resource leveling.

Note regarding F9: If the information in the Task Drivers pane is incorrect, or if you are unsure of its accuracy, press F9 to recalculate the project and refresh the information by using the current project data.

Tip #2: Multi-Level Undo 

A new feature of MSP2007 is the ability to perform multiple "Undo's" in the application. This is familiar functionality for MS Office users.

Tip #3: Font & Cell Background Formatting

In Microsoft Project 2007, cells in a view can be highlighted to display different background colors, patterns and fonts. Types of tasks to highlight are selected based on certain criteria such as milestone tasks, critical path tasks, or summary tasks. Although the ability to change font characteristics existed in MS Project 2003, the ability to change background colors and patterns is new with MS Project 2007.

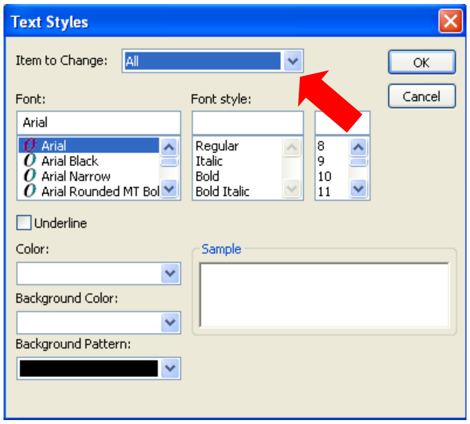
Highlight Categories of Cells

To use this feature, a Sheet view of the schedule must be used. Sheet views present information in rows and columns, similar to a spreadsheet or table of information. An example of a Sheet view would be the left side table of a standard Gantt Chart view.

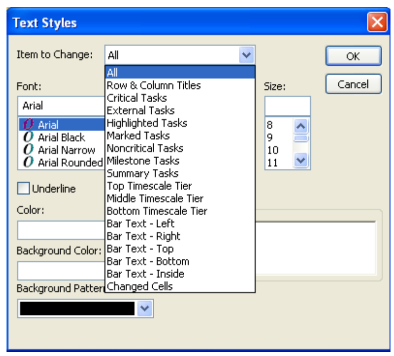
NOTE: There is an enterprise global template in MSP 2007 PWA. You can transfer the settings from the enterprise global template in PWA to their machine, create a new project that uses the enterprise global template, and then save that file locally, selecting the option to save all enterprise custom fields and global items. You can then open the saved MPP file on their computer use the Organizer to copy the items to the enterprise global template on your computer.

1. On the **Format** menu, click **Text Styles**.

2. In the Text Styles dialog box, click on the dropdown menu in "Item to Change".



3. The following list is displayed:



4. Select the category of cells that you want to highlight from the "Item to Change" list. The list includes:

Item to Change	Description
All	Select to highlight cells in all columns and rows in the project schedule.
Row & Column Titles	*Only changes to font attributes can be made with this selection – cell background highlighting is disabled.*
Non-critical Tasks	Select this option to highlight the cells for tasks with the "Critical" field set to No.
Milestone Tasks	Select this option to highlight the cells for tasks with the "Milestone" field set to Yes.
Summary Tasks	Select this option to highlight the cells for summary tasks.
Critical Tasks	Select to highlight cells for tasks with the "Critical" field set to Yes.
Marked Tasks	Select this option to highlight the cells for tasks with the "Marked" field set to Yes.
Highlighted Tasks	Select this option to highlight the cells for tasks that meet a filter's criteria when displaying all tasks in a filtered task list. See Appendix A for example.
Top/Middle/ Bottom Timescale Tier	Select this option to change attributes of the timescale headings in the right side graphical representation of the Gantt chart view. *Only changes to font attributes can be made with this selection –cell background highlighting is disabled.* See Appendix A for example.
Bar Text – Left/Right/Top/	Select this option to change attributes of the graphical representation in the Gantt chart view. *Only changes to font attributes can be made with*

	for example.
Changed Cells	Select this option to highlight cells that have changed as a result of changing specific data. It can be helpful for showing variance in a schedule, such as highlighting when a task's remaining hours or duration have increased. See Appendix A for example.
External Tasks	Select to highlight cells for placeholder tasks that are tracked in another project schedule. See Appendix A for example.

5. Set the desired Font (including font style, size, color, and underline options), Background Color, and Background Pattern.

Notes:

- ***The new default font is applied in the current view only.*** To use the font settings of this view in new projects, you can use the Organizer > Views tab, and copy the view containing the font and background selections you've made here to your Global.mpt file and the new project file.

A Pattern must be selected as well as a Color for cell background highlighting. Selecting a Color alone does not work.

Tip #4: Reschedule Uncompleted Work

The Update Project functionality existed in MS Project prior to version 2007. Use the **Update Project** dialog box to check for tasks that need to be rescheduled. Specifically, the Update Project dialog box can be used to:

- Update progress information for some or all tasks in your project.
- Reschedule uncompleted work to start after a date you specify.
- Update or reschedule work for either the entire project or for selected tasks.

NOTE: It is highly recommended that you update task statuses individually. Use this feature to filter for tasks that require updating rather than using it to reschedule all uncompleted tasks.

The "Reschedule uncompleted work" functionality automatically reschedules tasks that have slipped, or tasks that the project manager forgot to update. Project reschedules the work, setting the scheduled start date to your specified date and applying the "Start No Earlier Than" constraint.

If the task is in progress but behind schedule, Project schedules the remaining duration to start on your specified date.

Tip #5: My Tasks – Indicators

The "My Tasks" view in PWA includes indicators to highlight certain tasks to the user. Following is a list of all possible indicators and their meanings:

Indicator	Meaning	Recommended action
	The task was added since you last viewed this page.	No action required. If you want to request that this assignment be deleted, delete the new task.
	The Actuals were rejected by the project manager.	Contact your project manager to resolve the problem, and then resubmit the Actuals.
	The assignment was changed since you last saved its status. Any changes you made were overwritten with those made by the project manager.	Review the changes to the assignment, and consult with the project manager as needed.

	You entered the status and saved it, but the status has not yet been submitted.	No action required. Click “Submit Selected” when you are ready to send the status to your manager.
	A note is attached to this task.	Click the note indicator to read the note.
	A document is associated with this task.	Select the task, and then select a document from the list to view it.
	A risk is associated with this task.	Select the task, and then select a risk from the list to review it.
	An issue is associated with this task.	Select the task, and then select an issue from the list to review it.
	Tasks highlighted in orange are due today or tomorrow.	Update the status of your assignment in PWA.
	Tasks highlighted in pink are overdue.	Contact the Project Manager to devise a plan to get the task back on track.

Tip #6: Remaining Work Display Preference

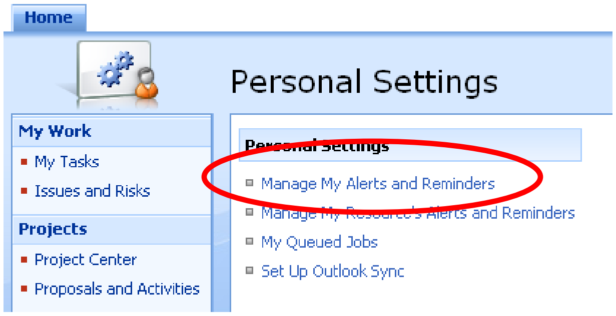
In “My Tasks”, users can select whether they would like Remaining Work on their assigned tasks to appear in Hours, Days, or other. To adjust the current setting go to My Tasks > Site Actions (upper right) > Edit Page > Edit (right above View options) > Modify Shared Web Part > Project Web Access (far right, scroll down) > Work Format. Select the preferred setting, and click “Apply”.

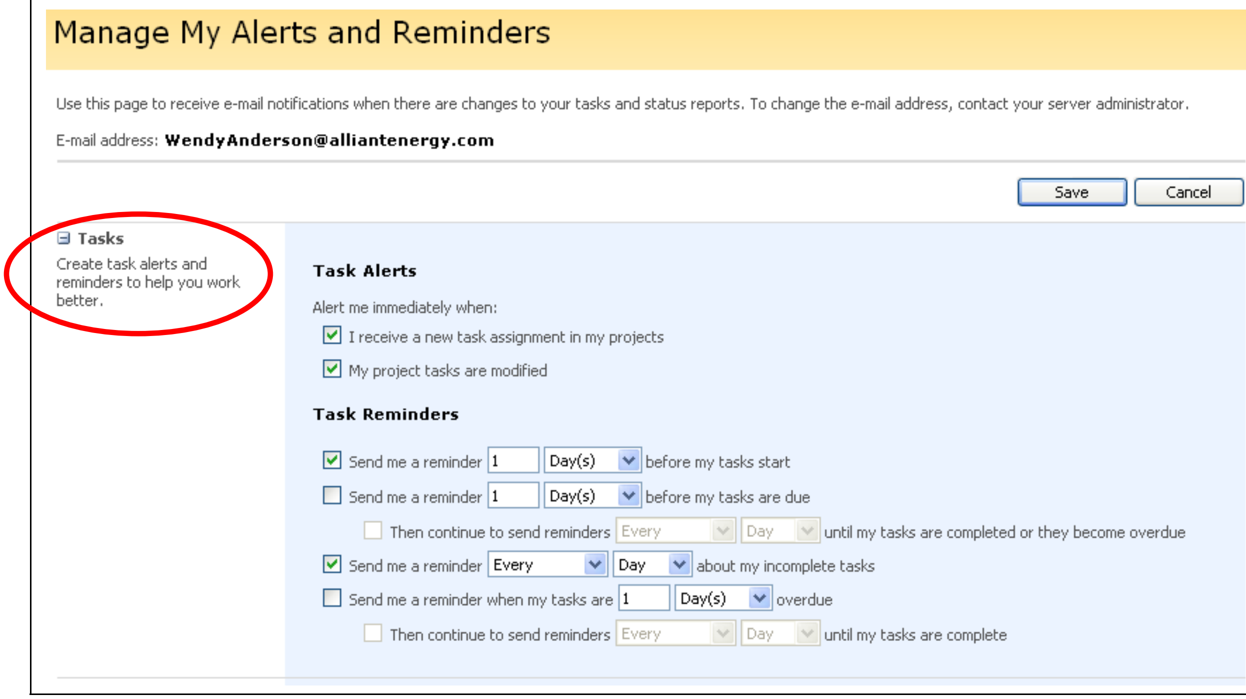
Tip #7: Alerts & Reminders

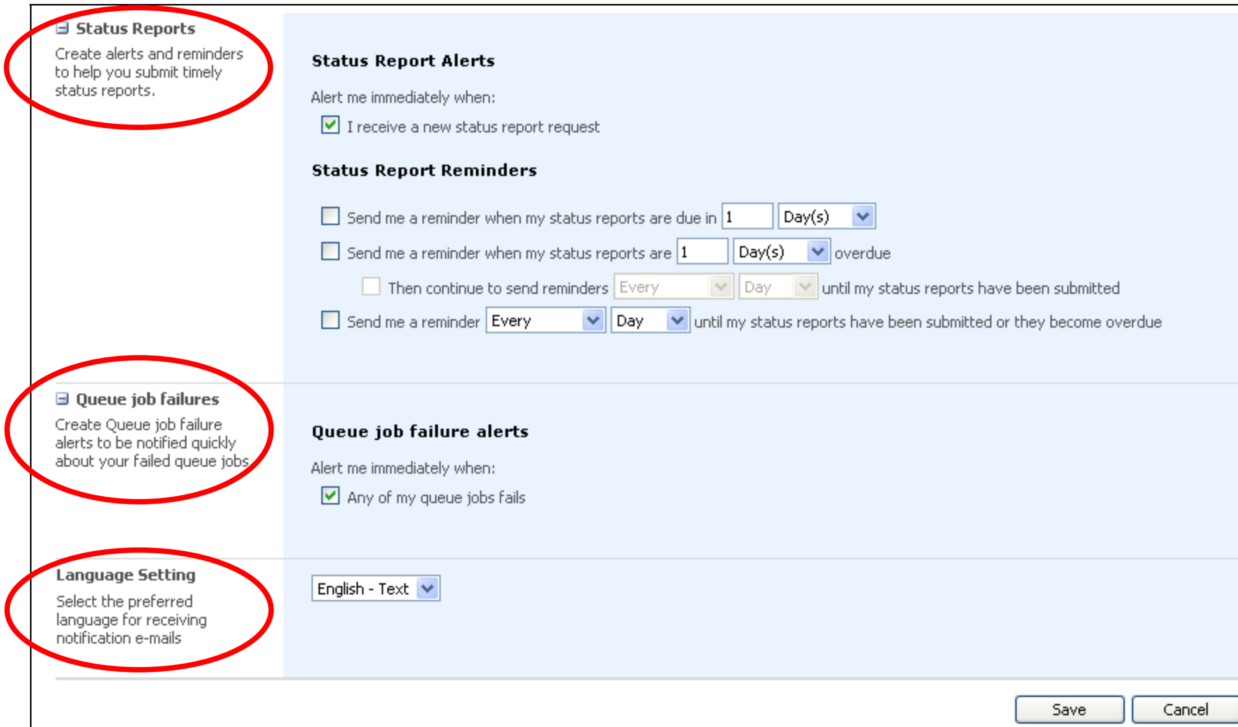
New to MSP2007 is the ability to define alerts and reminders that you want to use via Personal Settings in Project Web Access (PWA).

Alerts & Reminders - Steps
1. In PWA select “Personal Settings”:

2. Click on "Manage My Alerts and Reminders":



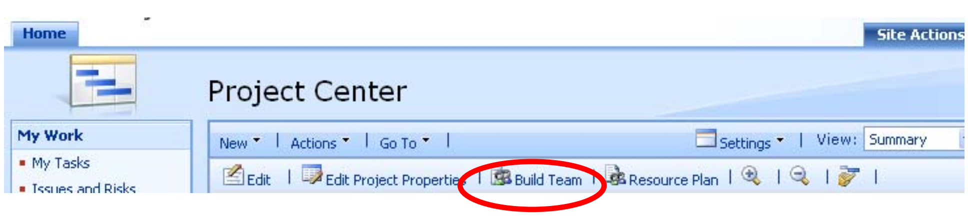


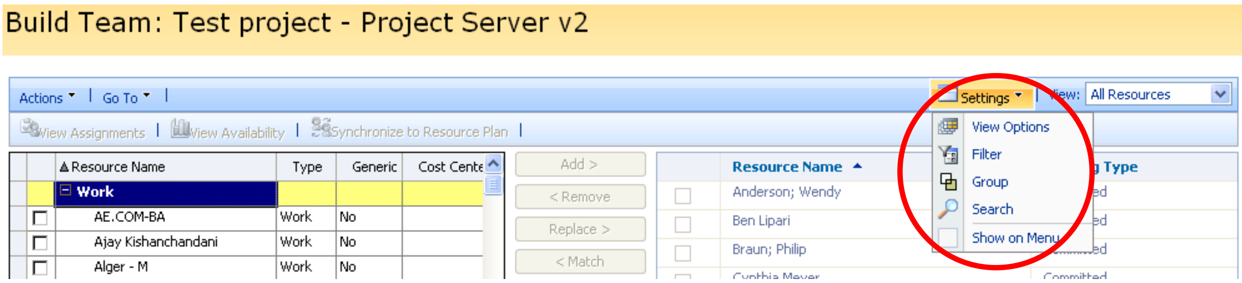


Select the options you prefer in the Tasks, Status Reports, Queue job failures and Language Setting sections.

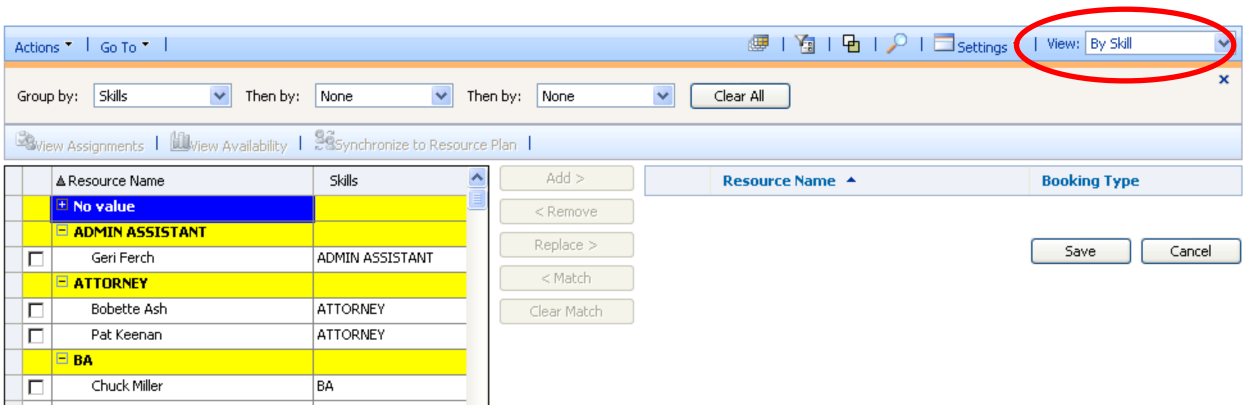
Tip #8: Resource Pool – Build Team

New in MSP2007 are improved skill and resource searching capabilities. Filtered views can be created that are specific to Team Builder. Filters and searches can be performed when accessing Team Builder in PWA.

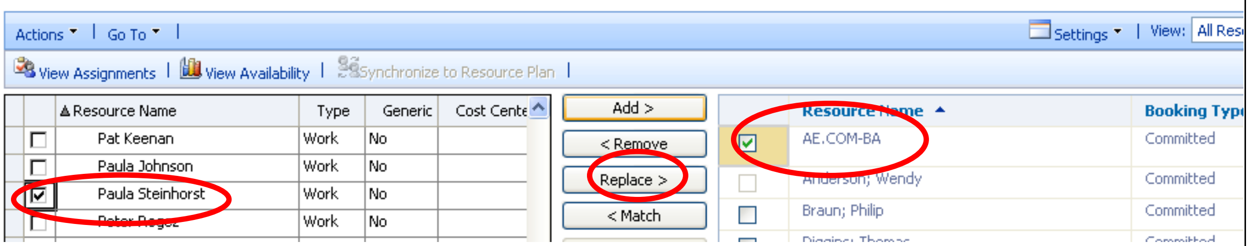
Build Team - in PWA
1. To use this functionality, go to Projects > Project Center > Highlight a project, and click "Build Team": 
2. In the Settings dropdown menu, select Filter or Group to view the resource pool based on your preferences, or select Search to find a specific name.



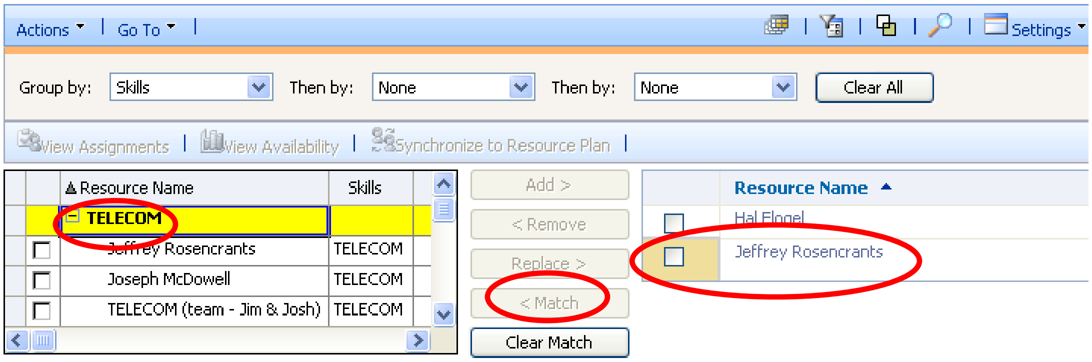
3. You can also select the preferred View. In this case, the user has selected to view resources grouped “By Skill”:



4. It is possible to replace a generic resource assigned to the project with a person by checking the person’s name on the left and the generic resource name on the right. Once both names are checked, the “Replace” button is enabled and can be clicked. See “Tip #8: Reassign Work” below for more information on replacing/reassigning resources.



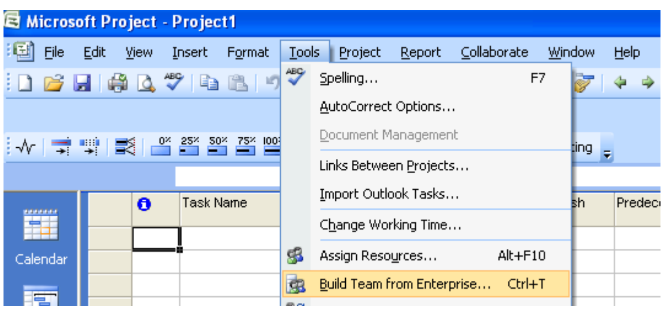
5. To find enterprise resources that match the skills and other attributes of one of your team's existing resources, select the resource that you want to match under Project Resource on the right, and then click Match. In this example, the resource on the right has a skill of “TELECOM”. When “<Match” was selected, the list on the left was filtered to show only resources with “TELECOM” as their skill. A resource on the left can then be selected to replace the resource on the right.



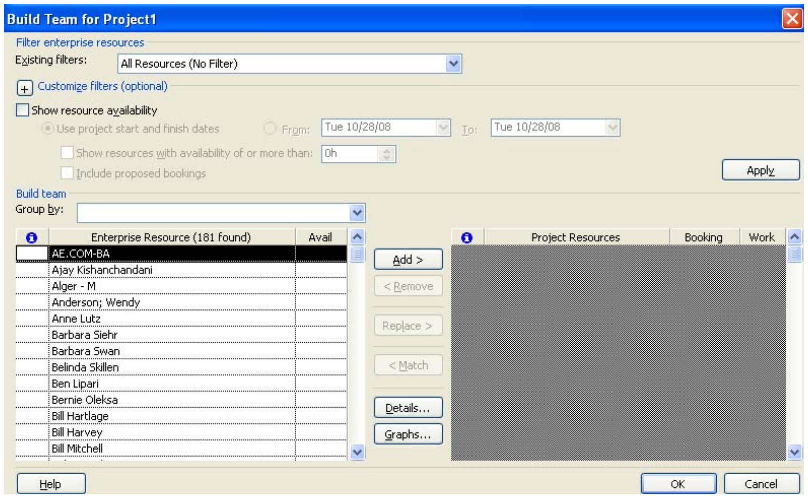
Build Team - in Project Pro 2007

Project Managers can also build their team from MS Project Pro 2007. Project Managers can add both "Enterprise Resources" and "Non-Enterprise Resources" (a/k/a "Local Resources") to their schedules. No other Project Manager can use your Local resources in their schedules. To build a team from MS Project Pro 2007:

1. Go to Tools > Build Team from Enterprise.



2. The following window appears:



3. As with PWA, resources can be selected from the left pane and “Added” to your project team on the right.

4. Once Enterprise Resources are added, you can go to View > Resource Sheet, and add any local resources that you do not want shared.

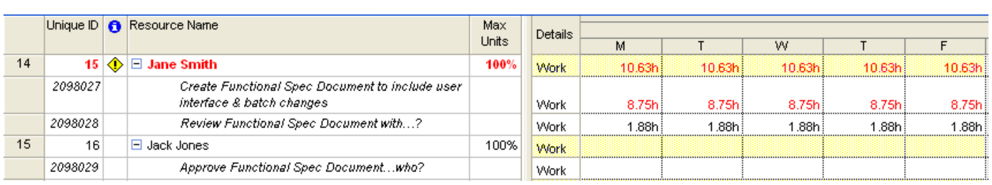
   NOTE: It is highly recommended that you use only Enterprise Resources in your project schedule. This avoids confusion and enables Resource Managers to look at their direct reports’ allocation across all projects to ensure appropriate allocation.

Tip #9: Reassign Work

A split view with the “Resource Usage” in the top window pane and “Task Details Form” in the bottom pane allows for easy reassignment of resources when one resource is over-allocated and there are other qualified resources with availability.

Reassign Work

The first step after selecting the above split view is to run the “Work Incomplete” filter to hide any tasks that are 100% complete and irrelevant to this purpose. In the following example, Jane Smith is over-allocated with 10 hours each day assigned to this project. Jack Jones, who has the same skill set, is under-allocated.



	Unique ID		Resource Name	Max Units	Details	M	T	W	T	F
14	15		Jane Smith	100%	Work	10.63h	10.63h	10.63h	10.63h	10.63h
	2098027		Create Functional Spec Document to include user interface & batch changes		Work	8.75h	8.75h	8.75h	8.75h	8.75h
	2098028		Review Functional Spec Document with...?		Work	1.88h	1.88h	1.88h	1.88h	1.88h
15	16		Jack Jones	100%	Work					
	2098029		Approve Functional Spec Document...who?		Work					

To easily reallocate task UID #2098028 from Jane to Jack, simply highlight the task row, drag and drop under Jack Jones:

	Unique ID		Resource Name	Max Units	Details	M	T	W	T	F
14	15		⊟ Jane Smith	100%	Work	10.63h	10.63h	10.63h	10.63h	10.63h
	2098027		Create Functional Spec Document to include user interface & batch changes		Work	8.75h	8.75h	8.75h	8.75h	8.75h
	2098028		Review Functional Spec Document with...?		Work	1.88h	1.88h	1.88h	1.88h	1.88h
15	16		⊟ Jack Jones	100%	Work					
	2098029		Approve Functional Spec Document...who?		Work					

Task UID #2098028 now appears in the resource usage view as being assigned to Jack Jones, who after the reassignment is not over-allocated. **Note:** If the task does not initially appear under the new resource's name, click the "-" to the left of the resource name, then reclick to expand the detail for this resource. The reassigned task will appear.

	Unique ID		Resource Name	Max Units	Details	M	T	W	T	F
14	15		⊟ Jane Smith	100%	Work	8.75h	8.75h	8.75h	8.75h	8.75h
	2098027		Create Functional Spec Document to include user interface & batch changes		Work	8.75h	8.75h	8.75h	8.75h	8.75h
15	16		⊟ Jack Jones	100%	Work	1.88h	1.88h	1.88h	1.88h	1.88h
	2098029		Approve Functional Spec Document...who?		Work					
	2098028		Review Functional Spec Document with...?		Work	1.88h	1.88h	1.88h	1.88h	1.88h

Tip #10: Multi-Value Custom Fields

The ability for custom fields to support multiple value selections is a new feature of MSP2007.

Example: An Enterprise custom text field to track "Sponsor" was created in PWA. In MS Project 2007, when creating a project schedule, the project manager can select multiple names from the Lookup table dropdown menu for this column.

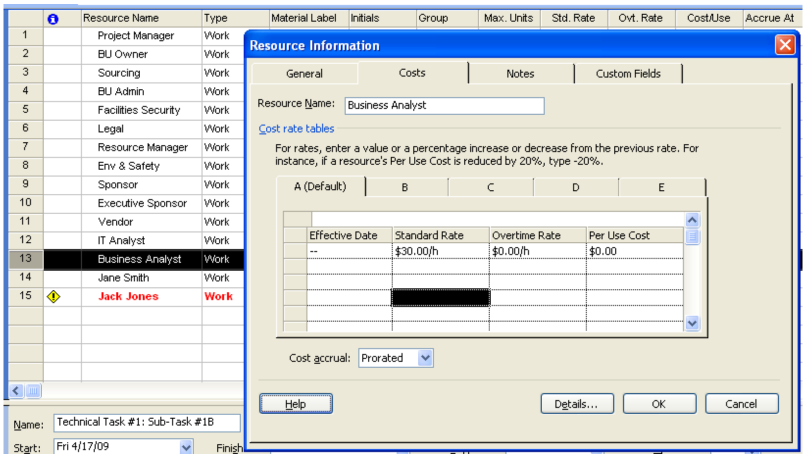
	Unique ID	Task Name	Sponsor
0	0	⊟ DMS Upgrade Schedule	
1	74	⊞ Project Milest	
20	1	⊞ Project Mana	
227	1013	⊞ Phase 1 Proj	
258	1012	⊞ Phase 2 Project Development	.utz,Kouba
1045	8	⊞ Project Closing	.utz,Kouba

- ☑ Heinrich
- ☑ Lutz
- ☑ Kouba
- ☐ Arenson

Tip #11: Entering Alternate Rates for Resources

This feature can be used when more accurate labor calculations are desired for estimating a project's cost-to-complete. For example, a project manager might decide to reflect an expected average annual merit increase of 3% for all internal resources for long duration projects.

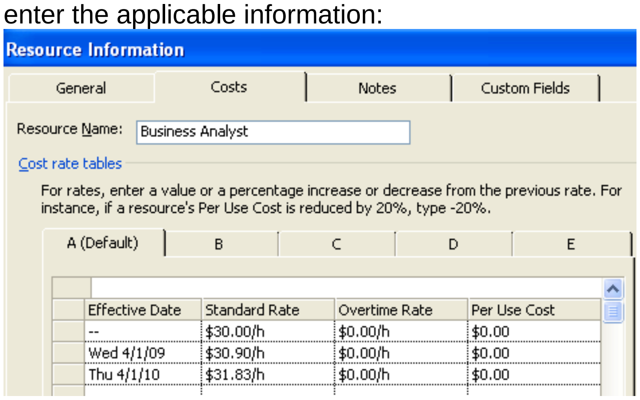
Entering Alternate Rates for Resources
From the Resource Sheet, double click on a Resource Name, and go to the "Costs" tab:



Using the cost rate tables, different rates can be assigned to the selected resource. Specifically, each tab, A – E, constitutes a different rate table, which can be used to account for rate increases or decreases over time due to work resource salary raises (the tables can also be used to reflect changes in material resources as applicable).

Effective Date: If two dashes (--) are in the Effective Date field, this means that the associated rate is currently in effect. This is the default rate that applies when no other effective dates exist, or for dates that the effective dates don't cover.

To enter a rate change that takes place on another date, in the additional rows of the cost rate table, enter the applicable information:



Tables B – E can be used to change the resource rates for that resource for a specific task assignment. This can be done via the Task Usage view by clicking on "Assignment Information".

Tip #12: Cross-Project and Inter-Project Links

A new feature in MSP2007 is the ability to establish logic between projects to create dependencies. If your project has a specific task that depends on a specific task in another project, use **cross-project links** to tie the task dates to one another. This way, if the task that you are dependent upon slips, the new dates are reflected in your own task. If your project is dependent on some aspect of another project, and the dependency is not necessarily tied to a specific task, use **inter-project dependencies** to identify exactly what each project brings to the relationship.

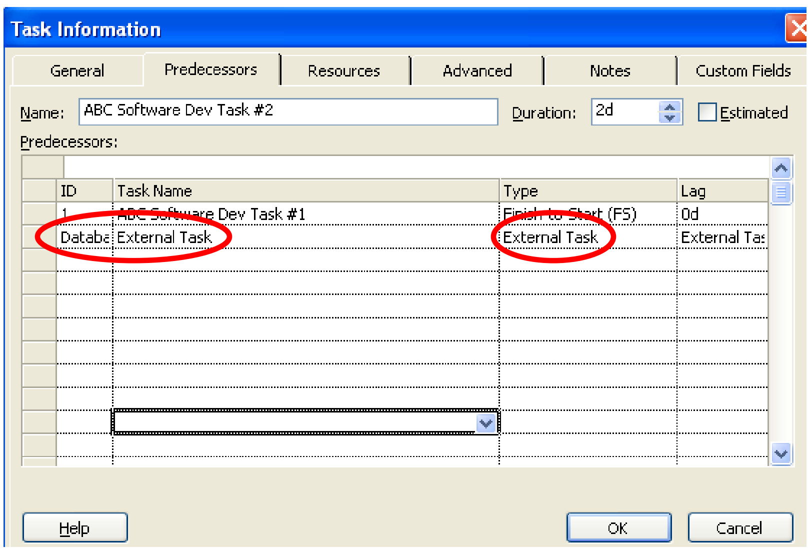
Note: When a change occurs to a task in another project that is a predecessor to a task in the subject project schedule, the subject schedule is not modified without the project manager's involvement.

Cross-Project Links

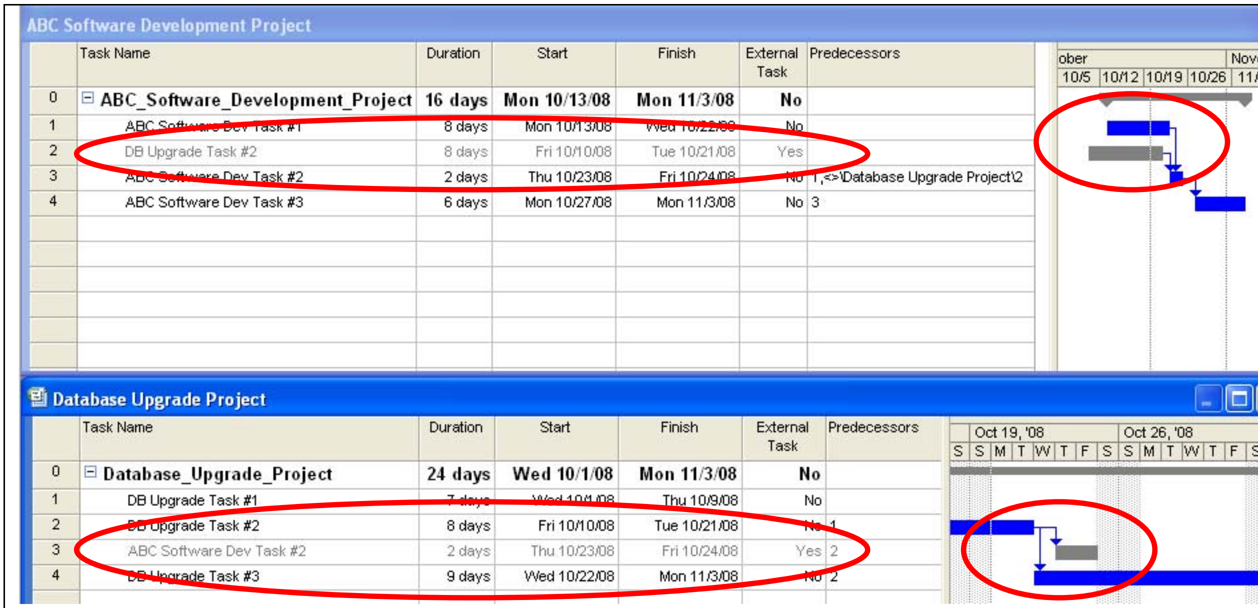
Cross-Project Link Example: In the following example, Task #2 in the ABC_Software_Development_Project is dependent upon completion of Task #2 in the Database Upgrade project. To create the link:

1. Open both projects.
2. On the **Window** menu of one of the projects, click **Arrange All**.
3. Click the task for which you want to create a dependency to an external predecessor.
4. Click **Task Information** icon in your toolbar, and then click the **Predecessors** tab.

5. In the **ID** column (NOT the Task Name), type the project name and task ID number of the external predecessor, separated by a backslash. In this case, **Database_Upgrade_Project\2** for task ID 2 in a file named Database_Upgrade_Project:



Following is a Gantt Chart view of the project schedules after the Cross-Project Link is established:



Notes:

- ❖ Both projects must be saved before you can link to an external task.
- ❖ Externally linked tasks appear dimmed in the task list. Double-clicking a task with an external successor or an external predecessor opens the project that contains the external task, if the project is available.

6. By default, you are notified if the data in an externally linked project has changed. The external predecessors and successors and the impacts to your schedule are displayed when you open a project with external links, and you can choose to accept any or all changes.

Inter-Project Dependencies & Creation of Deliverables

Inter-Project Dependencies Example: Inter-project dependencies provide a way for you to show that a project is dependent on the completion of another project's deliverables in order to be successful. By setting up inter-project dependencies, you can document and track projects without causing scheduling shifts.

Creating inter-project dependencies is different from linking tasks across projects. With inter-project dependencies you can set up your project, or specific tasks in your project, to be dependent on another project's deliverables, rather than its tasks. In addition, your project and task start and finish dates are not affected by changes to the dates in the project you are dependent upon.

Setting up inter-project dependencies is a **two-part process**. First, you need to identify the project's deliverables. After the deliverables are defined, you can set up dependencies on those deliverables in other projects.

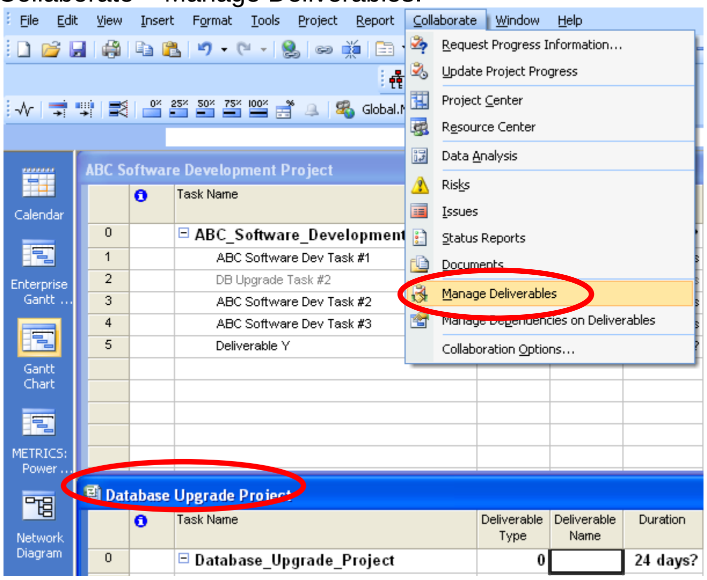
Notes:

- ❖ In order to set up inter-project dependencies, your project must be saved, and it must have a workspace site provisioned on Microsoft Office Project Server 2007.
- ❖ The Deliverable Type field for a task will contain a 1 if the task has an associated deliverable, a 2 if the task has an associated inter-project dependency, or a 0 if the task has no associated

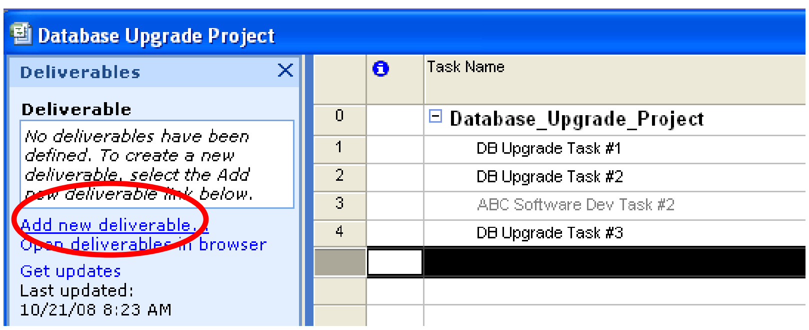
deliverables or inter-project dependencies.

PART 1: Identify the project deliverables

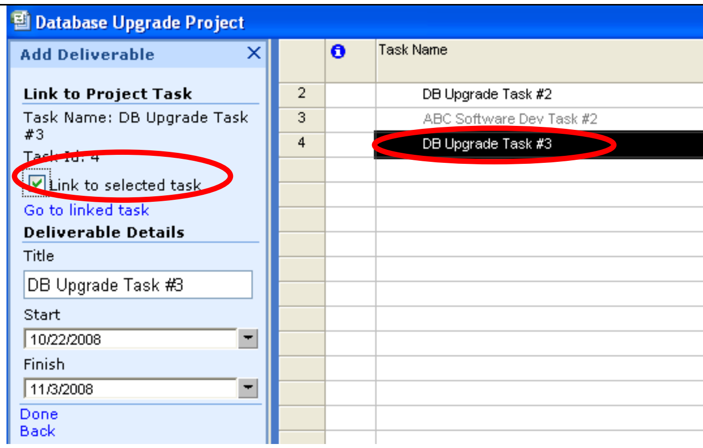
1. From the schedule that contains the deliverable to be linked to another schedule, go to Collaborate > Manage Deliverables.



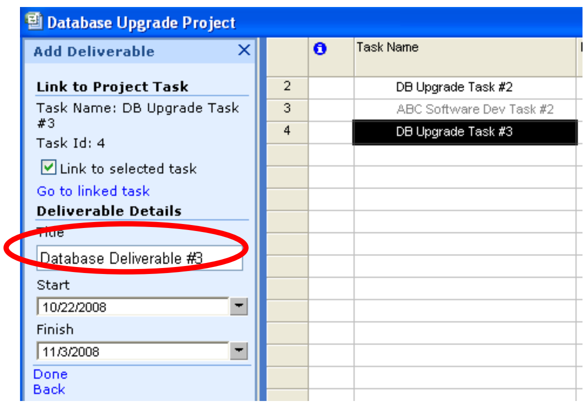
2. In the Deliverables pane, click Add new deliverable.



3. To indicate that the deliverable is the product of a specific task, click a task in your project, and then select the "Link to selected task" check box, under Link to Project Task in the Add Deliverable pane. **NOTE:** When you link a deliverable to a specific task, a Gantt bar is displayed that uses the Start and Finish dates for the deliverable. If the deliverable is not connected with a specific task, clear the Link to selected task check box.



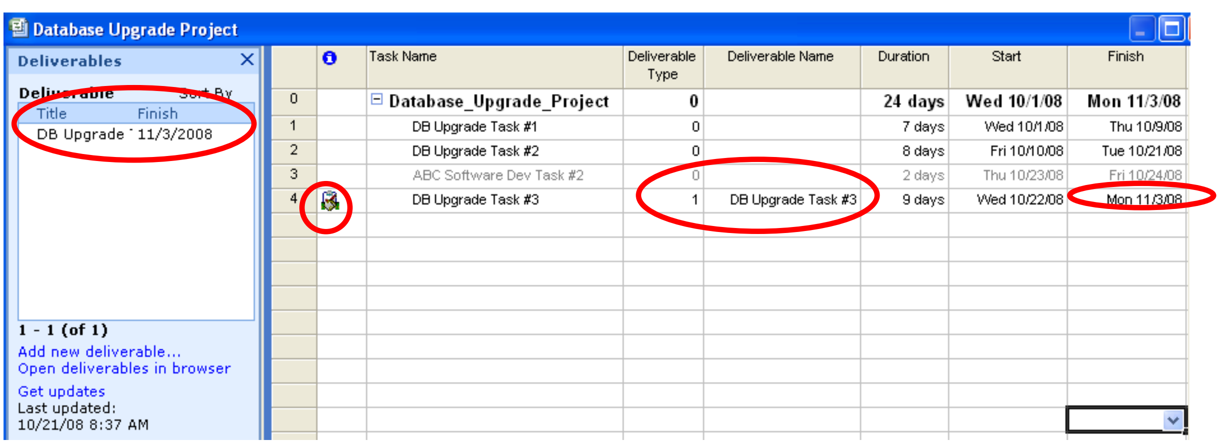
4. Under Deliverable Details, type a title for the deliverable in the Title box.



5. Enter a date when the deliverable will be available in the Start box.

6. Enter a date when the deliverable will be complete in the Finish box. NOTE: If the deliverable will be complete and available on the same day, enter the same date in the Start and Finish boxes to indicate that the deliverable is a milestone.

7. Click Done.



As you can see, the Deliverable Type is now set to “1” (the task has an associated deliverable) and the Deliverable Name is listed. The Deliverable Start and End Date entered by the user were

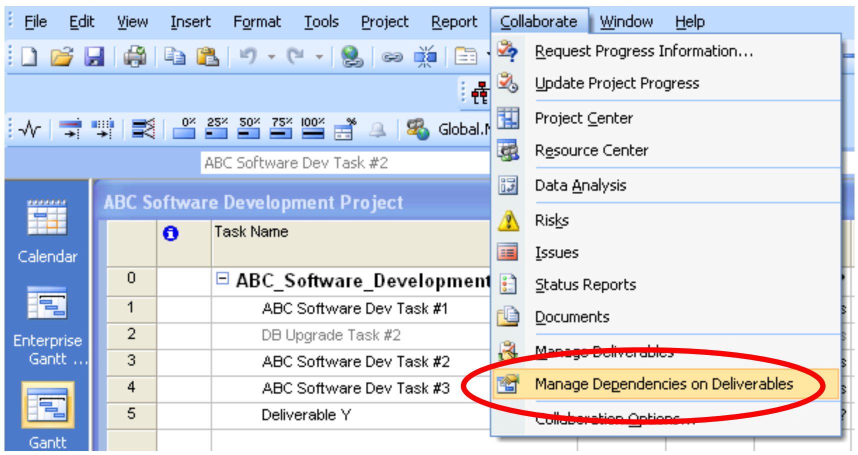
11/3/08 – making this a milestone deliverable.

Editing Deliverables: After you have initially identified your project deliverables, you may find that you need to change or delete a deliverable. To change a deliverable, in the Deliverables pane, click the deliverable that you are editing, and then click Edit deliverable. Modify the deliverable and then click Done to save your changes. **NOTE:** You can also click Edit in browser to edit the deliverable by using Microsoft Office Project Web Access.

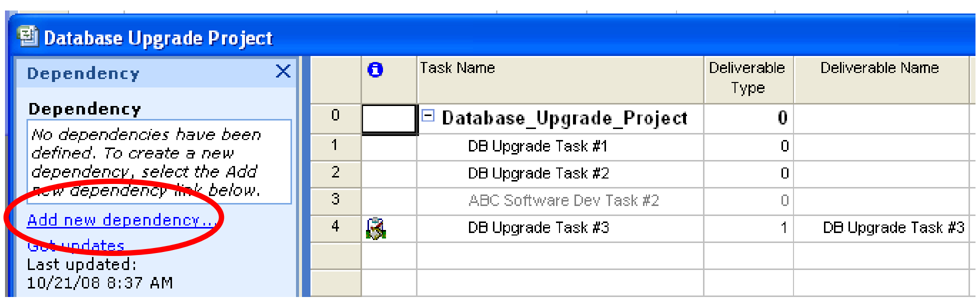
Deleting Deliverables: To delete a deliverable, in the Deliverables pane, click the deliverable that you are deleting, and then click Delete deliverable.

PART 2: Set up dependencies on deliverables in other projects

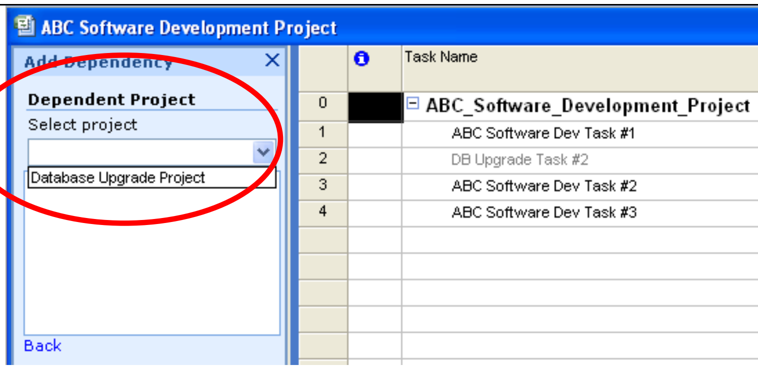
1. On the Collaborate menu, click Manage Dependencies on Deliverables.



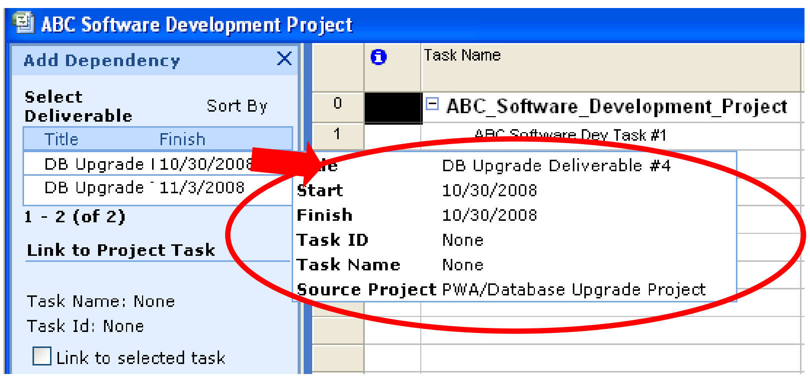
2. In the Dependency pane, click Add new dependency.



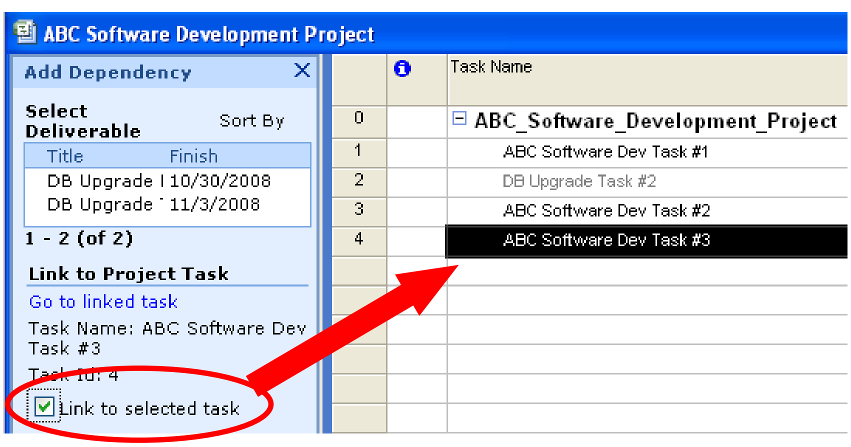
3. In the **Add Dependency** pane, under **Dependent Project**, select a project from the drop-down list.



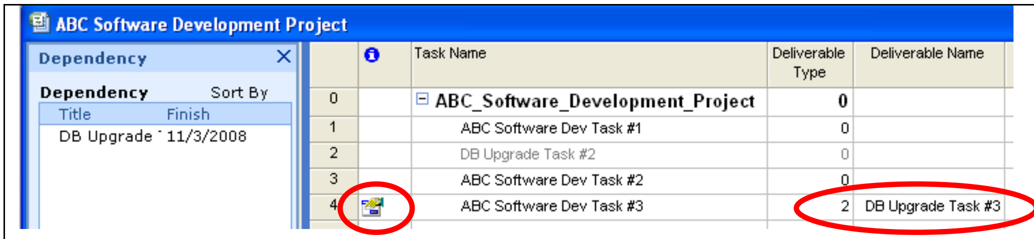
4. Under Select Deliverable, click the deliverable that you want your project to be dependent upon. **NOTE:** With a deliverable selected, click View selected deliverable in browser in the Add Dependency pane to view the deliverable's properties before you create the dependency.



5. To indicate that you want a specific task in your project to be dependent on the selected deliverable, click a task in your project, and then select the Link to selected task check box, under Link to Project Task in the Add Dependency pane. **NOTE:** When you link a dependency to a specific task, a Gantt bar is displayed that uses the Start and Finish dates for the dependency. If the dependency is not connected with a specific task, clear the Link to selected task check box.



6. Click **Done**.



As you can see, the Deliverable Type is now set to "2" (the task has an associated inter-project dependency) and the Deliverable Name is listed. The Deliverable Start and End Date entered by the user were 11/3/08 – making this a milestone deliverable.

After you have initially identified your project deliverables, you may find that you need to change or delete a deliverable. To change a deliverable, in the Deliverables pane, click the deliverable that you are editing, and then click Edit deliverable. Modify the deliverable and then click Done to save your changes. **NOTE:** You can also click Edit in browser to edit the deliverable by using Microsoft Office Project Web Access.

Deleting Deliverables: To delete a deliverable, in the Deliverables pane, click the deliverable that you are deleting, and then click Delete deliverable.

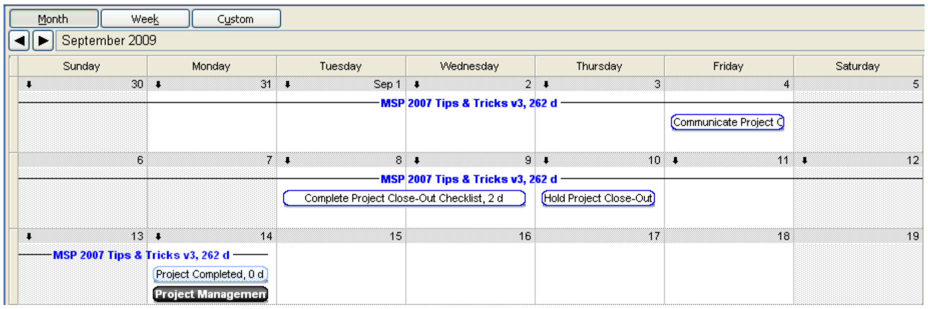
Editing Dependencies: After you have initially identified your inter-project dependencies, you may find that you need to change or delete a dependency. To change an inter-project dependency, in the Dependency pane, click the dependency that you are editing, and then click Edit dependency. Modify the dependency and then click Done to save your changes. **NOTE:** To view the deliverables that are associated with your project's dependencies, in the Dependency pane, click the dependency for which you are viewing a deliverable, and then click View deliverable in browser. After viewing the deliverables that are associated with your project's dependencies, you may also want to view the deliverables identified in your own project. Click Open deliverables in browser in the Dependency pane, or click Manage Deliverables on the Collaborate menu.

Deleting Dependencies: To delete an inter-project dependency, in the Dependency pane, click the dependency that you are deleting, and then click Delete dependency.

Tip #13: Calendar Views

MSP2007 provides users with the ability to change display options in the Calendar View. The new look and feel are familiar for MS Office users. The Calendar view includes several display options that enable you to show your tasks for specific weeks or months, use different heading styles, and shade working and nonworking days.

Change the Display Dates
Go to View > Calendar, and use the following steps to display different dates: 1. To display either a 5-day or a 7-day week, on the MSP Format menu, click Timescale. On the Week Headings tab, in the Display section, click 7 days or 5 days. 2. To display only one month at a time, click Month. The scroll buttons to the left of the month header will scroll one month at a time. 3. To display only one week at a time, click Week. The scroll buttons to the left of the week header will scroll one week at a time. 4. To display a specific number of weeks or specific dates, click Custom. On the Zoom dialog box, click Number of weeks, and then enter the number of weeks that you want to display in the corresponding box, or click From, and then enter the start and end dates for the time period that you want to display in the From and To boxes.



NOTE: Microsoft Office Project 2007 includes a preview pane in the Calendar view, to show you where the dates currently displayed fall within the three months surrounding the first date displayed. To turn this three-month preview pane on or off, on the Format menu, click Timescale. On the Week Headings tab, select or clear the Display month pane check box.

Change the Heading Titles

Heading titles are the text that is displayed at the top of each month, week, or day on the calendar.

1. On the View menu, click Calendar.
2. On the Format menu, click Timescale.
3. On the Week Headings tab, select the format that you want to use for months, days, and weeks from the Monthly titles, Daily titles, and Weekly titles lists.
4. In the Display section, select the Display Monthly titles beginning and end dates check box to display the starting month and ending month for the displayed calendar.

For example, if you have four weeks displayed and the first week starts at the end of June, selecting the Display Monthly titles beginning and end dates check box would display June - July as the month heading.

Change the Formatting & Shading in Date Boxes

1. On the View menu, click Calendar.
2. On the Format menu, click Timescale.
3. On the Date Boxes tab, in the Top row section, select the date title(s) that you want displayed in the upper left and upper right corners of each date box from the Left and Right lists.
   Note: Select Overflow Indicator from the Left or Right list to display an arrow when there are more tasks scheduled than can be displayed in a date box.
4. In the Top row section, select the shading options for the top of each date box from the Pattern and Color lists.
5. In the Bottom row section, select the date title(s) that you want displayed in the lower left and lower right corners of each date box from the Left and Right lists.
6. In the Bottom row section, select the shading options for the bottom of each date box from the Pattern and Color lists.
7. On the Date Shading tab, select the calendar you want to display from the Show working time for list.
8. To shade the date exceptions for the calendar, select the type of exception that you want to shade in the Exception type box, and then select shading options from the Pattern and Color lists.

For example, if your organization takes a holiday on May 1 to celebrate reaching a milestone, and you have identified that holiday on the base calendar as an exception, you can select Base Calendar Nonworking Days in the Exception type box and then select shading options, and May 1

will appear shaded in the Calendar view.
Note: Select different shading options for the base calendar and resource calendar to show which exceptions are organization-wide and which are specific to a resource

Tip #14: Force Check-In of a “Stuck” Project

Using the new MSP2007 server functionality, a Force Check-In of Enterprise schedules into the Project Server database can be performed. This might be required, for example, if the Client or Server goes down during a network outage when the project is checked-out. The enterprise object (ex. project, resource, custom field, calendar, look-up table or resource plan) reverts to the last version saved to the database, and any changes made after the last version will be lost.

The Force Check-In can only be performed by the Project Server Administrator.

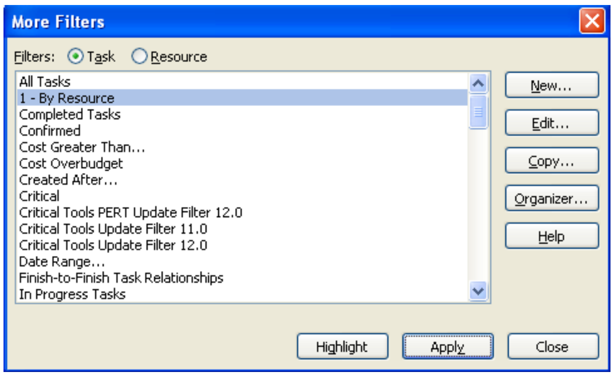
APPENDIX A: Font & Cell Background Formatting Examples

After making the desired updates in Format > Text Styles, apply the highlighting as follows:

Highlighted Tasks

In this example, the filter used is "1 – By Resource". This custom filter shows all tasks assigned to "IT Analyst".

1. Highlight the filter name and without having to run the filter, click the "Highlight" button.



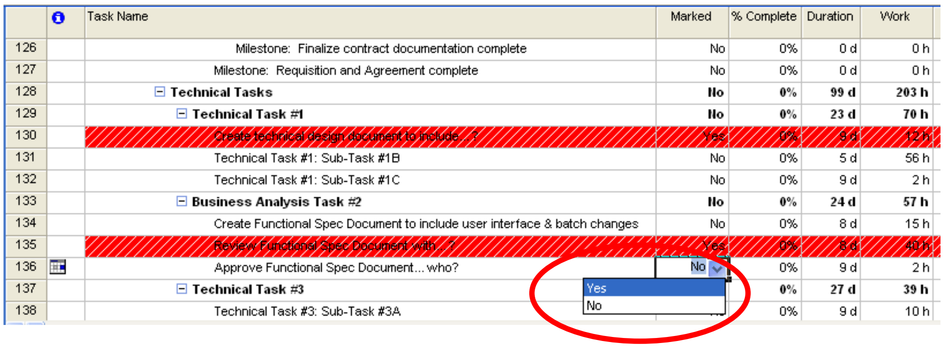
2. Scroll through the schedule and you will see all IT Analyst tasks highlighted as defined.

	Task Name	% Complete	Duration	Work	Early Start	Early Finish	Resource
128	**Technical Tasks**	**0%**	**99 d**	**290 h**	**Mon 4/6/09**	**Mon 8/24/09**	
129	**Technical Task #1**	**0%**	**23 d**	**70 h**	**Mon 4/6/09**	**Wed 5/6/09**	
130	Create technical design document to include...?	0%	9 d	12 h	Mon 4/6/09	Thu 4/16/09	IT Analyst
131	Technical Task #1: Sub-Task #1B	0%	5 d	56 h	Fri 4/17/09	Thu 4/23/09	IT Analyst
132	Technical Task #1: Sub-Task #1C	0%	9 d	2 h	Fri 4/24/09	Wed 5/6/09	IT Analyst
133	**Business Analysis Task #2**	**0%**	**24 d**	**144 h**	**Mon 4/6/09**	**Thu 5/7/09**	
134	Create Functional Spec Document to include user interface & batch changes	0%	8 d	85 h	Mon 4/6/09	Wed 4/15/09	Business Analyst
135	Review Functional Spec Document with...?	0%	8 d	55 h	Mon 4/6/09	Wed 4/15/09	Business Analyst
136	Approve Functional Spec Document... who?	0%	9 d	4 h	Mon 4/27/09	Thu 5/7/09	Business Analyst
137	**Technical Task #3**	**0%**	**27 d**	**39 h**	**Fri 5/8/09**	**Tue 6/16/09**	
138	Technical Task #3: Sub-Task #3A	0%	9 d	10 h	Fri 5/8/09	Wed 5/20/09	IT Analyst
139	Technical Task #3: Sub-Task #3B	0%	9 d	24 h	Thu 5/21/09	Wed 6/3/09	IT Analyst
140	Technical Task #3: Sub-Task #3C	0%	9 d	5 h	Thu 6/4/09	Tue 6/16/09	IT Analyst

Marked Tasks

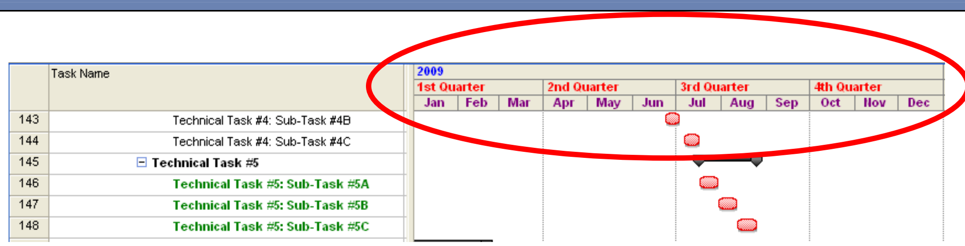
It might make sense to highlight Marked Tasks, for example, when project schedule development is in the initial stages and there are tasks that the PM needs further clarification on from team members.

1. Display the “Marked” column in the Gantt chart view. As you review the schedule and come upon tasks where questions exist, change the “No” in the Marked field to “Yes” and the cell highlighting will appear.



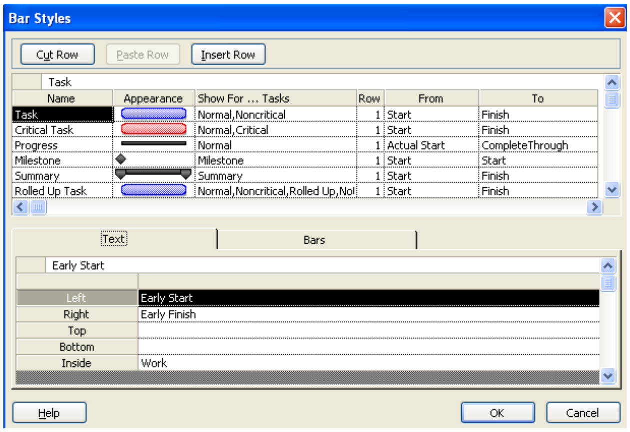
		Task Name	Marked	% Complete	Duration	Work
126		Milestone: Finalize contract documentation complete	No	0%	0 d	0 h
127		Milestone: Requisition and Agreement complete	No	0%	0 d	0 h
128		**Technical Tasks**	**No**	**0%**	**99 d**	**203 h**
129		**Technical Task #1**	**No**	**0%**	**23 d**	**70 h**
130		Create technical design document to include ...?	Yes	0%	9 d	12 h
131		Technical Task #1: Sub-Task #1B	No	0%	5 d	56 h
132		Technical Task #1: Sub-Task #1C	No	0%	9 d	2 h
133		**Business Analysis Task #2**	**No**	**0%**	**24 d**	**57 h**
134		Create Functional Spec Document to include user interface & batch changes	No	0%	8 d	15 h
135		Review Functional Spec Document with ...?	Yes	0%	8 d	40 h
136		Approve Functional Spec Document... who?	No	0%	9 d	2 h
137		**Technical Task #3**		**0%**	**27 d**	**39 h**
138		Technical Task #3: Sub-Task #3A		0%	9 d	10 h

Top/Middle/Bottom Timescale Tier

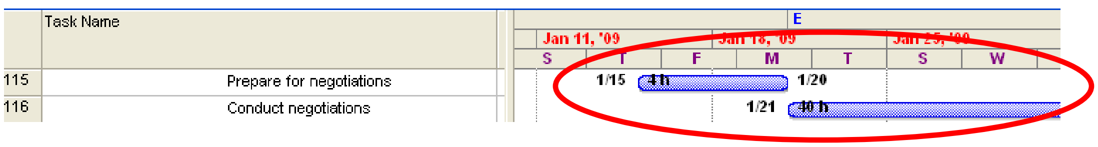


Bar Text – Left/Right/Top/Bottom/Inside

1. In Format > Bar Styles, select the text fields you want to appear in the Gantt chart view.



2. Scroll through the schedule and the bar text will appear as desired.



Changed Cells

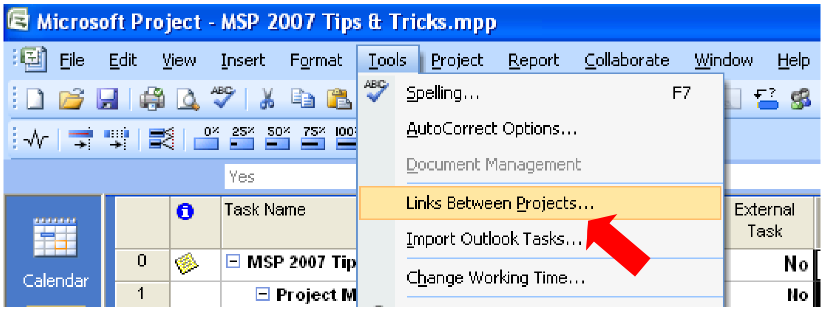
In this example, the highlighted tasks were updated. Once the schedule is saved (or when the user clicks F9) the highlighting will disappear.

	Task Name	Critical	% Complete	Duration	Work	Early Start	Early Finish
28	**Project Initiation**	**No**	**42%**	**32 d**	**29 h**	**Tue 9/2/08**	**Wed 10/15/08**
29	Select Project Manager	No	100%	4 d	3 h	Tue 9/2/08	Fri 9/5/08
30	Meet with Sponsor	No	100%	1 d	4 h	Fri 9/5/08	Fri 9/5/08
31	Meet with OPM	No	75%	4 d	16 h	Wed 9/3/08	Mon 9/8/08
32	Select Core Team	No	100%	2 d	6 h	Mon 9/8/08	Wed 9/10/08
33	Meet w/Func Mgrs:Confirm PM particip'n in emp per	No	100%	4 d	0 h	Wed 9/10/08	Mon 9/15/08
34	Review Business Case	No	80%	5 d	0 h	Tue 9/16/08	Mon 9/22/08
35	Receive Training in Project Management Concepts	No	0%	3 d	0 h	Mon 9/8/08	Wed 9/10/08
36	Receive Training in Project Management Schedulinç	No	0%	2 d	0 h	Thu 9/11/08	Fri 9/12/08

External Tasks

An external tasks represents a relationship in which the start or finish date of a task in this schedule depends on a task in another project. Note: Your project schedule is not updated automatically when external dependencies change, so it is important to review and update dependencies regularly.

1. On the Tools menu, click “Links Between Projects”.



2. To see a list of tasks that are linked to external predecessor tasks, click the **External Predecessors** tab. To see a list of tasks that are linked to external successor tasks, click the **External Successors** tab. For changes to external predecessors that affect the successor tasks in your project, review the **Differences** column. Differences usually include a new start or finish date or task name for the external predecessor or external successor. Note: By default, you are notified whenever data in an externally linked task changes. When you open a plan that has external links, the external predecessors, external successors, and effects on your schedule are displayed, and you can choose to accept any or all changes. You cannot undo acceptance of the changes after you click OK. However, you are assured that the project is synchronized with all external files.