

Successful Microsoft Project 2002 Deployment

With its release only six months ago, Microsoft Project 2002 is now being deployed by many organizations worldwide. Microsoft Project Professional and Microsoft Project Server 2002 is adaptable depending on the company's demands on the tool, and mirroring this flexibility there are many ways to install the tool. As a result, Microsoft Project 2002, when used as an EPM solution, cannot be deployed by simply slipping in the CD and pressing "go". In response to the complex installation, Microsoft has been looking to provide assistance to those implementing the tool. One support document made available to MPUG-Global is the "Installation Notes from the field", prepared by Michael Jordan, Consultant, Microsoft Consulting Services (MCS). This 47-page work in progress provides a step-by-step approach to successful Project Server installations. Whilst this cannot be considered the definitive guide to deploying the tool, those customers who follow these steps in a concise manner should secure a successful implementation.

Michael Jordan explains his thoughts behind the "Notes from the field" by observing that "the installation is only one aspect to implementing Project 2002 and it is important not to underestimate the planning, coordination and effort for a

complete EPM solution." He further explains "Notes from the field" places an emphasis on the preplanning process to provide forethought into capturing the technology information and identify the necessary resources required within the organization to assist with the installation and configuration before it commences."

With his emphasis on planning, the "Notes" provide step-by-step instructions making installation easier to troubleshoot. By following the notes enclosed in six different sections (pre-installation planning, installation guide, post installation configuration, uninstall procedures, troubleshooting and support information) users can now find exactly where issues in the process may have arisen and as a consequence fix them! Those using the document must adhere to the following assumptions:

1. This document assumes a single server installation, as other considerations need to be made for split server installations. Refer to the help file PJSVR10.CHM for more information.
2. The Project 2002 installation will be accessed with Project Professional.
3. The Project 2002 installation will use SQL Server for the database and not MSDE.
4. The person performing the installation has administrator privileges on the server.
5. The person performing the installation has working knowledge of Microsoft Technologies namely: Windows 2000 Server, Microsoft SQL Server and Internet Information Server.
6. The technology described in Table 1 Section 2.1.1 (please see document on MPUG-Global website) is already installed on the server and configured correctly.

"Preplanning process" is key to a successful deployment, and by using the four tables in the checklist enclosed in the "Notes", users can evaluate and capture information that is required during the installation. These tables mirror the four different stages that need to be completed to install the tool effectively. Each stage is described using a series of pictures and

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Email: info@mpug.org Web: www.mpug.org

MPUG-Global World Headquarters

3923 Ranchero Drive, Ann Arbor, MI 48108 (U.S.A.)
Phone: 734.741.0841 Fax: 734.741.1343

MPUG-Global U.K. Office

#10 Bloomsbury Street, London WC1B 3SR (U.K.)
Phone: +44 (0)7905 326001 Fax: +44 (0)20 7462 0101

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Editor in Chief Liz Curwen

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From the Editor

Those of you who read the last newsletter will recall I mentioned my father and a certain Christmas present that I bought him every year. On hindsight, with it being the Christmas edition of the newsletter I should have probably left that anecdote to this issue, but nevermind that leaves me more room to take a look at the last year in MPUG-Global.



Liz Curwen

I am the newest member of the MPUG-Global team and yet when I joined back in February 2001 there were already seventeen chapters established. As you all know MPUG-Global has grown rapidly since then, and I would like to welcome the many members who have joined in the last year. It has been an expansionist year, and now with the South East England and Puget Sound Chapters under the MPUG-Global wing, the community can live up to its name as the "official international community supporting Microsoft Project." This official endorsement, combined with MPUG-Global's new status as a Microsoft Project Partner, demonstrates our close relationship with Microsoft. As the year draws to a close, MPUG-Global now has thirty-one chapters worldwide. This is sure to increase in the coming year – so stay tuned there might be a chapter launching in your back yard!

The year 2002 wasn't just about MPUG-Global's success, it was also about Microsoft Project 2002. The launch of MS Project 2002 dominated most of our year, with the MPUG team present at the launch at ProjectWorld in May, and many MPUG members participating in Microsoft District launch events in June all over the USA and Canada. MPUG-Global members have played their part in the launch of MS Project 2002, with the entire membership being invited to beta test the new product at the end of 2001. Eighty members were selected to beta test the tool, and in doing so assisted in shaping the product on the market today. This year, MPUG-Global members received the marketing beta back in May and will receive the 120-day Enterprise Project Management evaluation CD by the end of the year.

MPUG-Global is committed to providing you, the member, with as much information about the latest product as we possibly can. Over the last year we have given you insight into MS Project 2002, running a series of four articles over the year on the tool's evolution, and the impact it will have on companies that choose to implement it. Looking forward, six months after the product release, we are starting to receive case studies, articles and tips on the new tool. Indeed in this issue, resident columnist Brian Kennemer looks at changing status methods in Microsoft Project 2002. Brian looks at the new MS Project Professional used in conjunction with Project Server, an aspect of MS Project new to us all. For those of you already

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From the Editor

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using the tool, this article will give you insight into how to use the new tool more effectively, and for those still considering an upgrade – this will give you a taste of things to come! All the newsletter articles featured in *The Project Network* are written by our members, and as they start to use the new tool on a more regular basis, they will be able to share their experiences with you.

Experience is the key word really, and I wanted to say thanks to all of you for sharing and creating such a great MPUG-Global experience over the last year. From all the hard working chapter officers to the newsletter authors, to those of you who give time to present at and attend those chapter meetings all over the globe, I take my hat off to you. We wouldn't have accomplished such great things without you!

Stand by, there's more to come in 2003, so make sure you don't miss out and **renew your membership today**. Have a look at the box below for more details. See you all in 2003, and from all at MPUG-Global, have a very happy healthy holiday season! ◀

Best regards,



Liz Curwen
Editor
lcurwen@mpug.org

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Microsoft Project 2002

(continued from page one)

instructions over some 14 pages, providing important guidance to deploying Microsoft Project 2002. The four different steps that must be followed are:

- Setting Up Microsoft Project Server
- Post Project Server Setup Configuration
- Setting Up SharePoint Team Services
- Post SharePoint Team Services Setup Configuration

Following the MS Project Server installation, Project Web Access and Project Professional need to be configured with the MS Project server. Pre-empting any issues at this point in the deployment, Jordan has outlined some invaluable troubleshooting tips. Additional support downloads, troubleshooting tips and some resource websites are all available at the back of the document.

"Notes from the field" will no doubt assist many users in deploying this tool, but it should be considered more as a support document rather than a definitive guide. Those finding installation a challenge should refer to two other options available: the Enterprise Project Management Starter (EPM) Kit and the Jumpstart Program.

Featured in the last issue of the newsletter, the EPM Starter Kit has been created to guide prospective MS Project 2002 users through the complex implementation process. The software in this kit is valid for 120-days, and each customer is given four hours of complimentary telephone consulting support. The attraction of the kit is that those customers who decide to purchase the software do not have to go through the intricate installation process again.

The Jumpstart Program complements the EPM Starter Kit, by taking the implementation process to the next level. Those companies who want to evaluate the business benefits of Microsoft Project 2002 can do so over a five-day period. Working with a consultancy, companies can test drive the complete solution, discovering the great features of this Enterprise Project Management Solution and how it can improve their own business practices.

Those of you considering installing Microsoft Project Professional and Microsoft Project Server should secure some level of support. Whether using the "*Installation Notes from the Field*", or by capitalising on the assistance provided in the EPM Starter Kit and Jumpstart Program, this is a complex procedure that cannot be done alone! Utilizing the resources available to you will ease your "pain" and allow you to capitalize on the great opportunities presented by Microsoft Project 2002.

To access "*Notes from the field*", visit the MPUG-Global Members Only page: <http://www.mpug.org/members.asp>. To find out more about the EPM Starter Kit and Jumpstart Program visit <https://microsoft.order-2.com/projstarterkit/>. ◀

Changing Status Methods in Microsoft Project 2002

Here is a common question for those starting out with Microsoft Project Server and MS Project Professional: “I created my project plan and published the project and the assignments. However, when my resources go to their *Timesheet* view in Project Web Access, they cannot edit the daily hours field (or in some cases, the % Complete, Remaining Work or Actual Work fields) and complete their timesheets. How do I set up these fields so my resources can edit them?”

This problem arises because there are three different ways for resources to submit their status, and different projects can use any of the three different methods. I will look at these methods in this article, and how to set up a default method for each new project.

The Methods

- **Percent of work complete:**
The resource is asked to enter a percentage value representing the completeness of their assignments. They will also be able to edit the *Remaining Work* field and update the estimated time needed to complete their assignments.
- **Actual work done and work remaining:**
This method asks the resource for an *Actual Work* value and a *Remaining Work* value for each assignment.
- **Hours of work done per day or per week:**
For those who use traditional timesheet systems, this is the most familiar method. Resources simply report the hours worked on each task during each time period, such as days or weeks.

Setting the default

The Project Server administrator can set the default method for each new project and can also require that all

Brian Kennemer is an MS Project MVP and Project Specialist for QuantumPM. Along with penning this column, Brian is also the Vice President for the Puget Sound Chapter.

Ask Brian covers topics appearing in the Microsoft Project Support Newsgroup, where people with questions about MS Project can interact and seek solutions. Members can find this newsgroup and many more in the Members Only Section, www.mpug.org/members.asp

projects use a particular method, on the *Tracking Options* page. To get to this page you must first be logged on as an administrator. Once you are logged on, click the *Admin* link at the top of the page, and then click the *Customize Project Web Access* link. This will then default to the *Tracking Options* page as seen in Figure A below.

At the top of Figure A you can see that there are options for each of the three methods. This allows the administrator to set a default tracking method. At the bottom of Figure A is a section called *Lock down defaults* which gives the administrator the option to either allow the project manager to pick from the three methods or to enforce the use of the default assigned above. The settings in Figure A would require that all new projects published to Project Server use the *Actual Work done* and *work remaining* tracking method.

Allowing the Project Manager to choose their own method

In some cases the administrator will allow the Project Manager to pick one of the three methods. This is done in the *Customize Published Fields* dialog within Microsoft Project Professional. Click on *Tools*, *Customize*, and *Published Field* to get this dialog, shown in Figure B.

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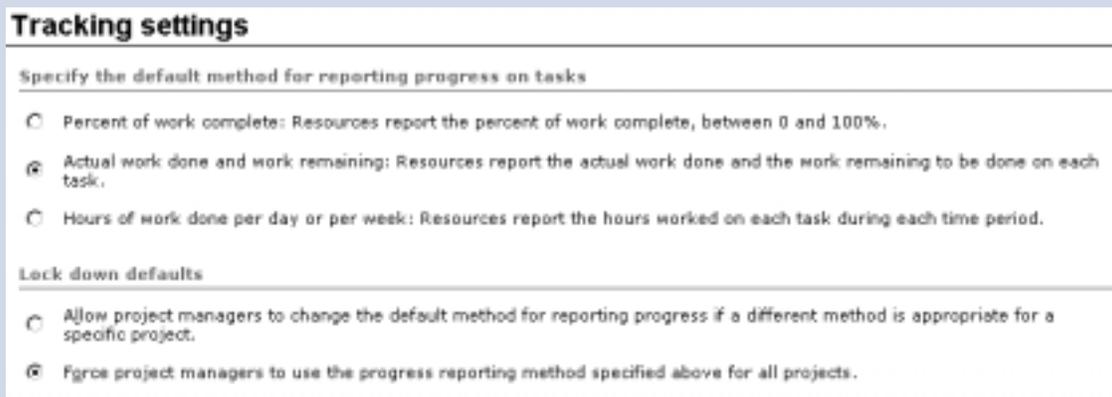


Figure A

Ask Brian

(continued from page four)

Figure B shows that currently the project is accepting the default as shown by the administrator. The Project Manager does have the option to choose his own method as well.

It is VERY important to remember that published resource assignments use the tracking method that is defined in this dialog at the time the assignment is published. This means that if you pick one method and publish assignments to the Server and then change to another method, the previously published assignments will continue to use the method in effect at the time that they were first published. The Project Manager needs to republish the assignments to the server for the new methods to take place. To do this, click on *Collaborate*, *Publish* and *Republish Assignments*, this will bring up the *Republish Assignments* dialog seen in Figure C.

To republish assignments of this kind you may want to uncheck the *Notify all affected resources via email* option. Since you are not really changing the substance of the assignment, you don't really need to let the other resources know.

As with any option or feature, it is wise to set up a test project and experiment to see the effects of the changes you make. I would recommend you become familiar with how these changes will affect assignments already submitted. Your success in using this new tool depends on your ability to understand how even little changes will impact your project. Don't take my word for it, have a go and try it for yourself! ◀

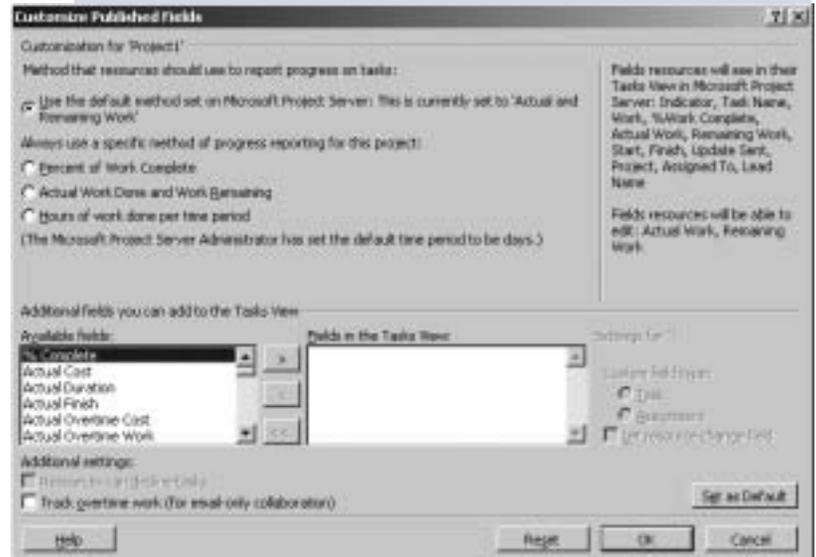


Figure B

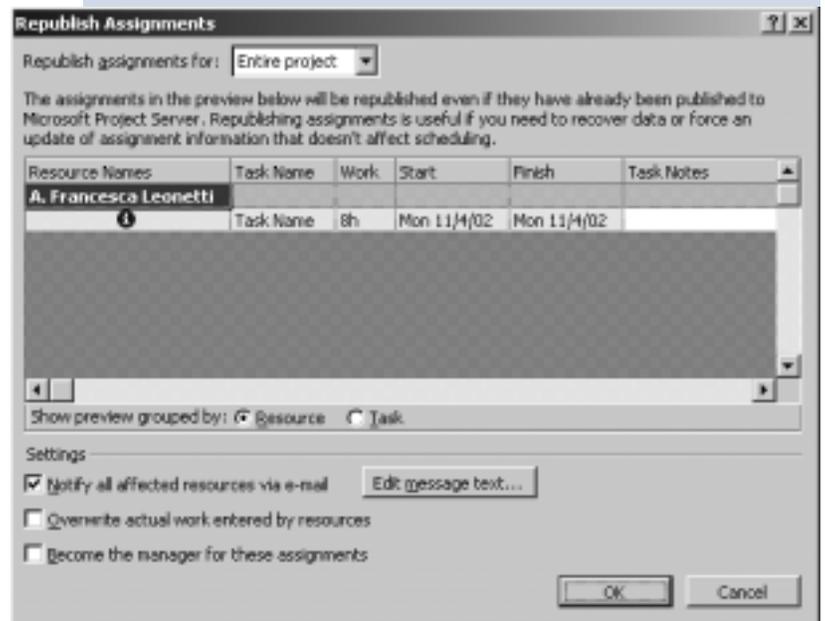


Figure C

Getting Assistance with Microsoft Project

By Lynn Frock (President, Greater Cincinnati MPUG Chapter)

It happens to the best of us. We can't remember how to make an adjustment to the task or resource model, or customize a presentation feature, and we can't quite figure out how Microsoft Project is calculating the dates or costs that we see displayed. Well, don't despair, there's a lot of available help out there. I find the following resources very helpful:

1. **Microsoft Project Help Menu.** Try either the Contents and Index command (enter either questions or keywords), or the What's This command, (move the

mouse pointer over an object and left click). The Help system is extensive.

2. **Dialog box Help button.** Some dialog boxes have a Help button. Clicking one of these buttons will provide information about the features of the dialog box.

3. **Peer networking.** Find the local Microsoft Project expert and treat that person well!

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Getting Assistance

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4. **Books.** These are all commercially available, you can benefit from reference books, self paced instructions, and hybrids.
5. **MPUG-Global web site (www.mpug.org).** This is a great online resource, and for members, the information out there just keeps on growing. Members can access resource libraries containing information on MS Project 98, 2000 and 2002, as well as presentations conducted at chapter meetings throughout the globe. Members can post their problems on one of the many Microsoft Project newsgroups and can browse through the many Microsoft White Papers posted online.
6. **Telephone support.** Call +1 426 635 7155 and quote the code on the installation pack. Individuals and small businesses have unlimited installation support and two free incident supports. After that, both have to pay for the service; there are two rates: one for MS Project and another for MS Project Server. This information is available on the Microsoft website: <http://www.microsoft.com/office/project/support/default.asp>.
7. **MPUG chapter meetings.** All chapters hold at least three meetings each year. Meetings are a great place to network with members and experts in the field. The meeting topics vary from chapter to chapter, and questions are always welcome.
8. **Microsoft Project Newsgroups.** You can post an issue on a newsgroup and see if a reader has the answer. There are six Microsoft newsgroups that can be accessed at <http://support.microsoft.com/newsgroups/default.aspx>. When you click on this link you will be taken to a list of public newsgroups. Scroll down and you will see the six newsgroups relating to MS Project. To take full advantage, you will need to join each of the newsgroups that you are interested in.
9. **Microsoft Project Solution Providers.** These companies offer products, consulting and training services, to support and enhance Microsoft Project. Have a browse on this site: <http://www.eu.microsoft.com/office/project/resources/partners.asp>.
10. **Microsoft Project Site.** Microsoft has a whole host of information about Microsoft Project 2002 on its homepage. For those using Microsoft Project 98 or 2000 click on the "Previous Versions" button on the right hand side of the Microsoft Project page, to get more information. Much of the information listed here is now on the MPUG-Global Members Only site, but it still makes interesting reading. Visit: <http://www.microsoft.com/office/project/default.asp>.



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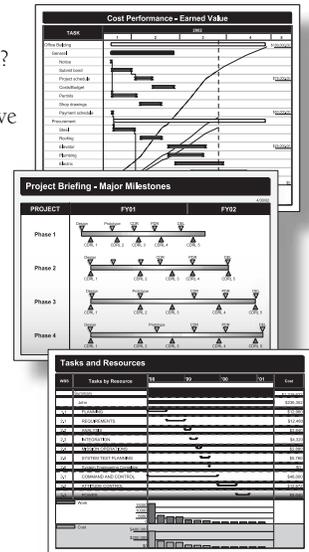
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Hope the above is helpful! ◀

Using Multiple Resource Pools in Microsoft Project 2000

As most of you already know, in Microsoft Project 2000 you can only use one *Resource Pool* at a time. Most of the time several projects share one *Resource Pool*, but what about when one project needs to share resources from several *Resource Pools*?

For example, my client came to me with this situation: “We would like to draw resources from four places into one single schedule. Each of these four places contains over 250 resources, and combining them all together into one *Resource Pool* creates a large, unwieldy *Resource Sheet* that is difficult to maintain. I know that grouping would make it more manageable, but each of the pools is in a different division within the enterprise and is managed by different people, and to make it even more complicated, some of the resources are people and some is equipment. Is it possible for us to have more than one *Resource Pool*?”

The answer to my client was yes; if you don't mind switching from pool to pool using the *Tools, Resources, Share Resources* pull down menu. This can be rather cumbersome, especially if you have a lot of switching to do.

To solve my client's problem, I created a series of macros and *Toolbar* buttons allowing them to switch from pool to pool. I also created a *Workspace* icon which allowed them to open the schedule and all the different resource pools with just one mouse click. The *Assign Resources* dialog box can be opened while switching; this displays the different resources from each pool as the different *Resource Pool* buttons are clicked.

Here's the procedure:

Creating the Workspace:

Assuming that the *Resource Pools* have been created, open all files that are to be used including the *Project* file. Once all of the files are opened, select *File, Save Workspace*, name it and save it in your preferred working subfolder. Next, using Windows NT Explorer, go to the subfolder that contains the *Workspace* you just saved, highlight it, right click and select *Create Shortcut*. Then reduce the size of the window, click and drag the icon onto your desktop. When this icon is double clicked, it will open all the *Resource* and *Project* files sequentially without having to open them one by one.

Tommy's Tips is presented by Westney Project Services (www.westney.com) to promote the applications of Microsoft Project and provide a few real life applications that “aren't in the books”.

Tommy Lovelace is a Senior Consultant with Westney, and the President of the Houston Chapter of MPUG-Global.

Creating the macros:

Select the *Project Schedule*, then select *Tools, Macro, Record New Macro*. When the macro dialog box appears, select both *Row* and *Column References*. Name the macro after your first *Resource Pool*. Don't use spaces in the name, and if more than one word needs to be used, separate them with an underscore, then select *OK*. This will start the recorder.

Now, select *Tools Resources, Share Resources* and select your first *Resource Pool* and click *OK*. Then select *Tools, Macro Stop Recorder* and select *OK*. This stops the macro you just recorded which, when run will select your first *Resource Pool* as the pool you wish to draw a resource from. Repeat the sequence for each *Resource Pool* you wish to use.

Creating the new Toolbar and Resource Pool Buttons:

Now we need to assign the macro to a convenient button, but first we need to create a new *Toolbar* to store the *Resource Pool* buttons until we need them. Select *View, Toolbars, Customize*. When the dialog box appears, select the *Toolbars* tab, then select *New*. Name the new *Toolbar* something like “Pools”, or whatever you prefer. This will show up in the *Toolbars Menu* when you right click in a vacant *Toolbar* space. When selected, your *Resource Pool* buttons will appear.

After naming the new *Toolbar*, you will see a small dialog box appear on the screen. If you don't see it, move the *Customize* dialog box around until you do find it, sometimes it's hiding underneath. Click and drag it up onto the *Toolbar*; this is where you will store your *Resource Pool* buttons.

Now select the *Commands* tab, click and drag as many of the available buttons onto your new *Toolbar* as you have *Resource Pools*. Don't worry about their original assignments, we're going to assign our new macros to them and modify their images.

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Tommy's Tips

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Select one of the *Resource Pools* buttons and you will see the *Modify Selection* box highlighted in the *Customize* dialog box. Select the box, then click on *Assign Macro*, the *Customize Tool* box will then appear. Using the drop down menu in the top slot, find your first *Resource Pool* macro and select *OK*. Your *Resource Pool* is now assigned to that button. Next, select *Modify Selection* again and select *Edit Button Image* or *Change Button Image*. Using your artistic creativity, create the button image, or select one of the many available buttons in *Change Button Image* for your *Resource Pool*.

Repeat these steps for all of your *Resource Pools* then close the *Customize* dialog box. Your *Resource Pools* are now available to you at the touch of a button.

You may change the *Resource Pools* as many times as you like. Open the *Assign Resource* dialog box to assign the resources; you will see the *Resources* change in the box each time you select a different *Resource Pool*. Be sure to save the changes to each *Resource Pool* so that the allocation will be saved. ◀

Keep on schedulin'Tommy

The Puget Sound Chapter Launches

The Puget Sound Chapter of MPUG-Global was officially launched on November 21 at Microsoft's world headquarters in Redmond, Washington. A highly interactive audience was treated to a great presentation on "The Integration of MS Project and Great Plains" by Mike Kremer of Microsoft. Throw in an overview of MPUG-Global, a great networking opportunity, and lots of door prizes, and the meeting was enjoyed by all! The new chapter already has a long history, as president Bruce Taylor has led a local, grassroots group of MS Project users in that area for many years. Now, as a member of the MPUG-Global community, MS Project



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What others are saying:

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Romi Mahajan, Business Development Manager for Microsoft Project & Visio
Microsoft, Inc.

"Working in conjunction with Microsoft Project 2002, Visual Intercept Project provides a highly robust framework, allowing us to implement organizational and process efficiencies throughout the company."

Brian Boyd, Sr., Director of Strategic Planning
iN DEMAND

Elsinore Technologies is a Microsoft Project Business Value Challenge 2002 Award Winner Finalist.

Managing Continuing Tasks with Project & Project Web Access/Project Central

By Philip Barrass (Member, South East England Chapter)

I was working on a project this summer and needed to find some elegant methods of managing continuing tasks using Project 2000 and Central or Project 2002 and Web Access. It took some time for us to figure this one out, but I thought it might be useful if I shared some of my experiences with you.

What is a "Continuing Task"?

The tasks in question are those that are not in projects, and are not time-bound. Their key attributes are:

- No fixed end date, or no end date at all
- Effort is often impossible to estimate
- When effort is performed, it does not necessarily reduce the remaining effort

For example, take the task "application support". It carries on all the time, so has no end date. We therefore set it to a chosen time period, such as 6 months or 1 year. We assume that a resource will spend 100 hours supporting this application, so we apply him or her to the task evenly, allocating about 8.5 hours per month for a 1-year task. There are problems early on, and 80 hours are used up in the first two months. Microsoft Project will reduce the remaining effort to 20 hours, but in fact we can see that this application is likely to need even more effort than first was estimated.

So that's the problem. Below are some of the settings and tips we came up with to handle it.

Should you use Fixed Duration, Work or Units?

We found this one was to be relatively easy. The tasks must not get shorter or longer, so use Fixed Duration.

Should you use Recurring Tasks or Single Tasks?

The benefits of using recurring tasks are primarily that the work does not "pile up" or disappear if the amount of effort put in early on into a project is less than or more than the effort scheduled. However, having recurring tasks creates so many entries in the timesheet and on the Gantt, that it was considered far too cumbersome. We decided on single tasks; people had to monitor the remaining work and adjust it as the project developed. This is best done in the Task Usage or Resource Usage views.

What Duration Should the Tasks Be?

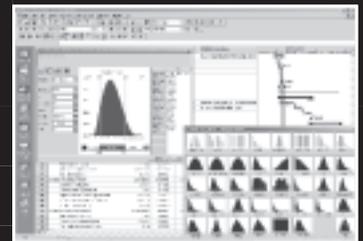
You would think this was simple but unfortunately it isn't. The Duration is, of course, the number of working days between the start and end. You can use Elapsed Duration but I really wouldn't advise it because it considers all the days in

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Managing Continuing Tasks

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between as working days. The point is that you will have to juggle the duration to take into account non-working days such as Christmas, Eid, Yom Kippur, Diwali etc. These are project non-working days, remember, not resource non-working days.

How do we stop tasks moving when the first actual work done is not at the start?

Clearly, if you have a 12-month January to December task called Internal Training, and you first get some internal training in mid June, you don't want the task to move its start to mid June. You must therefore set an Actual Start date for the 1st January before any Actual Work is recorded.

Should we have non-working time captured?

We did, because the client wanted all staff to be able to enter 100% of their contractual time, whether at work, sick or on leave. There were therefore tasks for each kind of non-working "activity". This poses a couple of problems. Firstly, you have to be careful with people's individual calendars, and not double up the "task" of vacation with non-working time on calendars. Secondly, because you have to assign people to the tasks in order to make them show on timesheets, they will never be 100% available for normal project tasks. You can minimize the impact by assigning at very low levels (say one minute over a year), and only entering realistic allocations for actual dates, as they become

known. You can also adjust the maximum allocation percent down, but it's still a pretty rough estimate. In our case, the client simply understood that there would be a slight skewing of availability.

What should the tasks be called?

If you have generic tasks that are repeated in many different plans, it helps to include a bit of detail in the task name. This is because when a task entered on Web Access is reviewed by the PM, it is not always evident where it has come from. Seeing the task "Support" 25 times in a row can be pretty unhelpful.

Who should manage these plans?

Remember that it is the plan owner who gets to see and accept the time submitted. You can have a substitute in MS Project 2002, but it is really simpler to have the same person managing the plans and accepting time. We ended up splitting the plans, so that one PMO person owned the non-working time plan for everybody. Application support plans were split between the managers of the different support teams, which allowed them to validate each person's time allotted to chargeable work.

I hope some of this is useful. These are just some of my own ideas, and if you have any suggestions of how to manage continuing tasks more effectively, please let me know. ◀

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Achieving Consistent Microsoft Project use through Company Standard Template (CST) files

By Dominic Moss (Member, South East England Chapter)

In my mind, Microsoft Project is perfect. Well it is if you work from 8am to 5pm, take an hour for lunch between midday and 1pm and never ever observe public holidays. Whilst a 40-hour week as dictated by Microsoft Project is not unusual, there are a lot of companies that differ, either in the hours per day and week or the start and finish times per day. The rigmarole involved in changing the settings and working time in Microsoft Project is probably one of the most frequent causes of complaint and confusion for new users.

When training people new to Microsoft Project, there are always problems when dealing with the “Change Working Time” dialogue box and the Calendar tab of the Options dialogue box. The best explanation I have come up with is that the Calendar tab defines what constitutes a working day and a working week, whilst the “Change Working Time” dialogue box allows you to set days that are out of the norm, public holidays for example (Fig1).

Having overcome the hurdle of explaining this feature of Microsoft Project, I then show people how to set up what I call a Company Standard Template (CST), which includes their own company calendar reflecting the contracted working hours per day and per week and any exception days they may observe. Creating this file saves the time and effort involved in creating and setting up a new calendar and ensuring the scheduled working time per day and week is correct, every time you create a new project.

Please note that whilst your project may be working to the custom calendar used to schedule, the display of non-working time is not updated to reflect the changed project calendar. You will need to change this on the “Nonworking Time” tab of the timescale dialogue box (Fig 2). The calendar being used for the scheduling of your project will be displayed with the bracketed words (Project Calendar).

To my mind the most important benefits to be derived from implementing a Company Standard Template are:

- Saving time and effort in setting up a new project file.
- Promoting a consistent use of the tool in line with an in-house methodology.
- Providing custom features to all Microsoft Project users in an enterprise as a matter of course.

The CST file helps Microsoft Project users copying custom filters as well. As many of you know, if you create

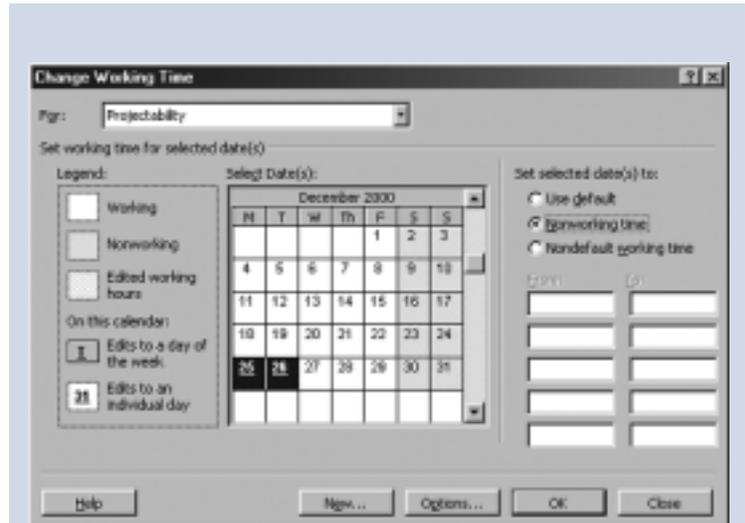


Figure 1

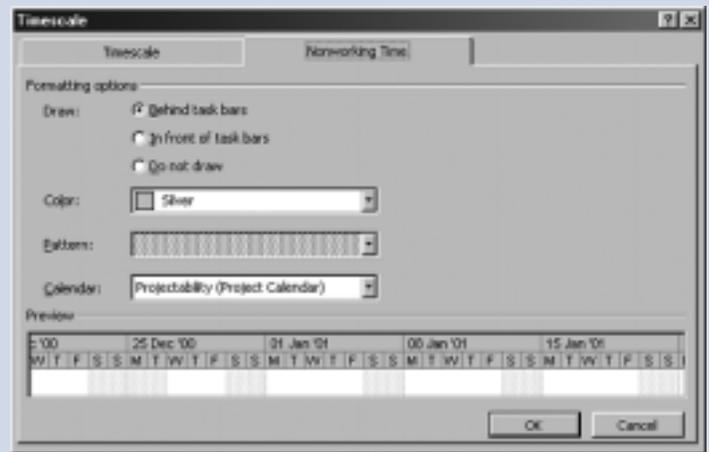


Figure 2

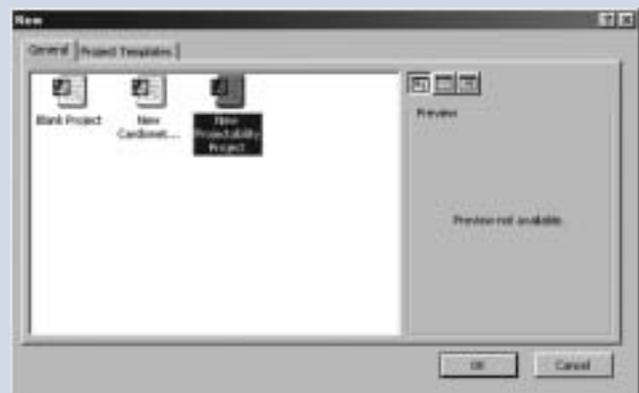


Figure 3

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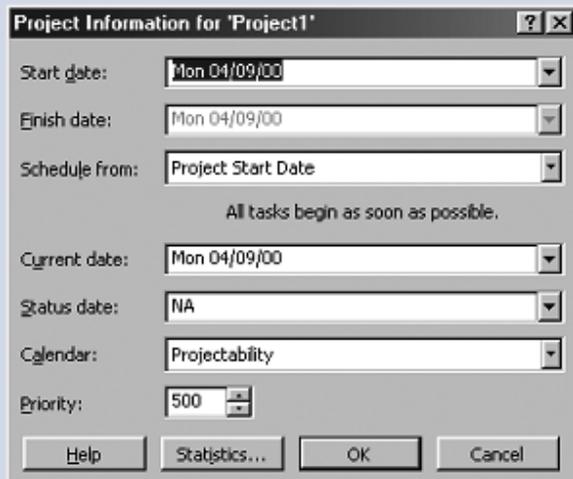


Figure 4



Figure 5

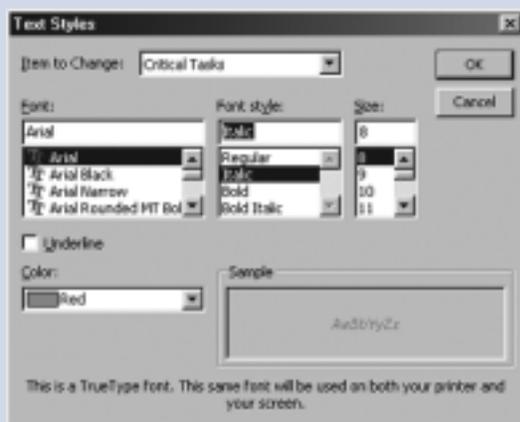


Figure 6

a new filter it will reside within the file in which it was created. Using the “Organiser” you can of course ensure that the filter is available from the Global.mpt file. This is great for the user who created the filter, but what about other users? You could of course distribute the file with the custom filter to all relevant users and ask them to copy it to their Global.mpt file, but this is a bit laboured. A quicker option might be to make a single Global.mpt file available to all users over a network; this will allow them to open the common Global.mpt file rather than a local one when they start up Microsoft Project.

There are drawbacks to copying custom components to the Global.mpt file, for example a file can be corrupted or over-written when re-installing or upgrading Microsoft Project. Copying custom filters to the CST file will ensure that they exist independently of the Global.mpt file and will exist no matter what happens to the original Global.mpt file. Conveniently Microsoft Project 2000 supports the approach of using templates elegantly by presenting them for use in the “New Project” dialogue box (Fig 3). Peculiarly the toolbar button for a new file does not display the same dialogue box.

When creating a new project file based upon the CST file, the project information dialogue box is exactly the same as the one for creating a new project file. The exception is that your company calendar is the base calendar for your project (Fig 4).

The benefits of a CST file are not limited to the default calendar and custom filters. The project summary task is a useful feature that can be set up as standard. Users can write prompts in the “Notes” section of the project summary task. Entering their name as the manager and a comment about the project, its scope or definition in the properties dialogue box is very helpful (Fig 5). If companies have an in-house methodology, why not create a hyperlink to this from the project summary task to further promote good practise.

You can define text styles and print set-up options by including a series of dummy tasks in your CST file. These will “stick” as long as there is at least one task in the template file. When one of the actual tasks has been entered the dummy tasks can be removed. You can change text styles to highlight which tasks are critical, for example you can change critical tasks to a red italic font (Fig 6) and perhaps use a bold blue font for Milestones. For printing purposes I like to set up headers, footers and the legend to include more information than may

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normally be included by default. I set up the legend to include the manager's name together with the name of the filter applied to the previewed schedule (Fig 7). By making the appropriate selection on the "View" tab in "Print Preview" you can also ensure that the notes attached to tasks are printed out. If you have a company logo, which is not too large or is available as a font selection, you can insert this into the header or footer. For those organisations that produce documents in a "house style", by defining print options in your CST file anyone can access the set template.

Adding gridlines can enhance the look of a Gantt chart and make it easier to read across from the task list to bars against the timescale. I typically include gridlines for the current and status dates, project start and finish dates and at every 5th row on the Gantt chart in my CST files (Fig 8).

Other features that can be included in the CST file include custom views, reports, tables, toolbars and the like. The default task type may also be changed to suit the needs of the business. For example, custom fields within Microsoft Project can also be used in a consistent fashion across all projects, ensuring a level of stability when it comes to viewing multiple projects or running routines in other applications using Project data.

The "Options" dialogue provides you with the chance to change settings for views, schedule settings, calculation, spell checking, editing, and workgroup settings. You can then save conventions in your CST file. Making the appropriate changes to the settings helps ensure a consistent use of the tool throughout an organisation.

Once you have set up your CST file you will need to save the file. By default, template files are saved to the C:\WINDOWS\Application Data\Microsoft\Templates location. In the "Save" tab of the options dialogue box (Fig 9) you can change the location to whatever you may wish to use on your network. You can also define where files of various types are saved to ensure project information is stored consistently.

If you are using Project Central, you can also define the settings and the URL for the server in the CST file (Fig 10.) By doing this all future projects are automatically directed to the right location when it comes to using this in Microsoft Project.

In addition to streamlining and enhancing the basic tool you can also use a CST file as the parent for any number of

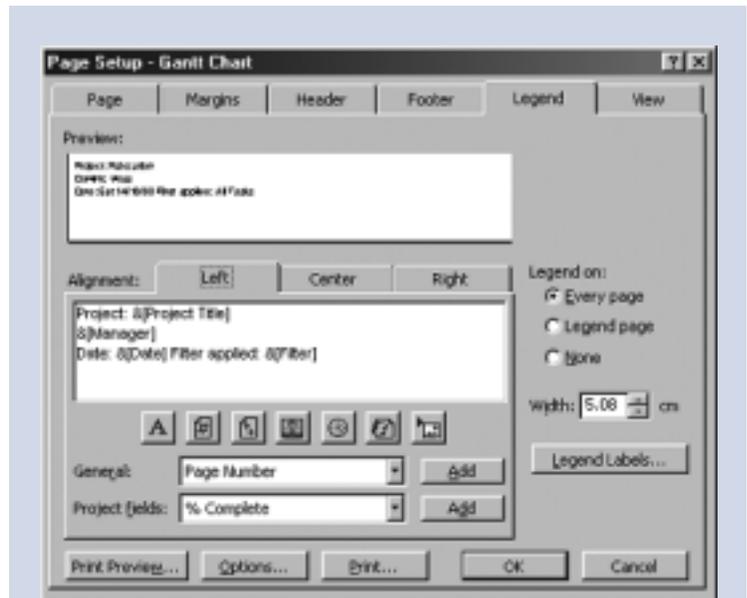


Figure 7

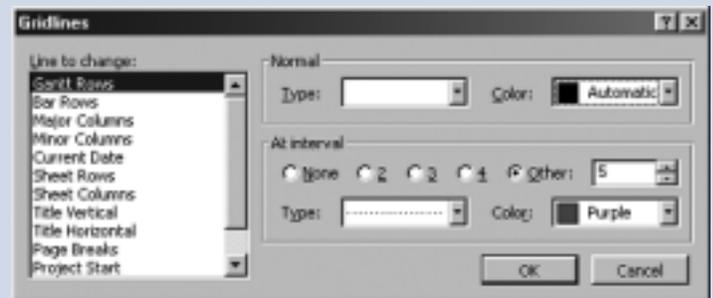


Figure 8

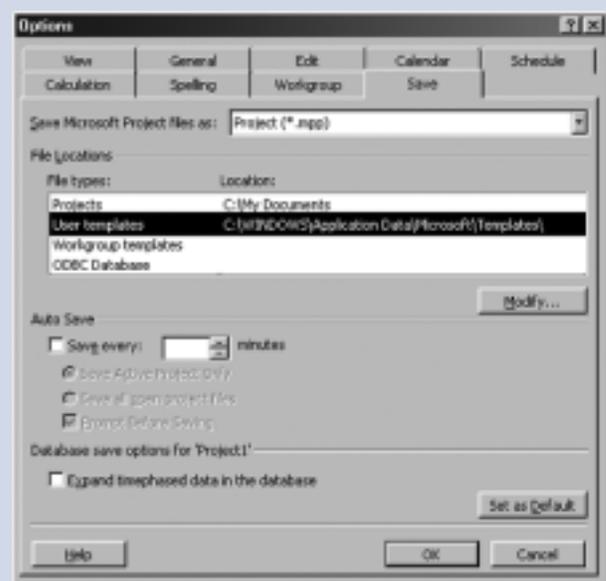


Figure 9

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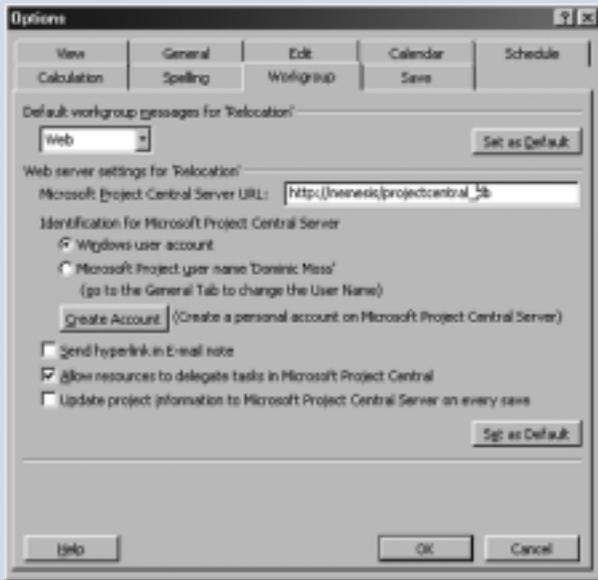


Figure 10

in-house procedure template files. Not only will there be a consistent standard employed in all such projects, but these detailed template files can act as a repository for good practise and continuous improvement within the enterprise. These will need to be continuously updated as part of the review process on project completion.

Finally, I always recommend that someone within a company be appointed the “guardian” of Microsoft Project within their company. The guardian should be in charge of the CST file, control the use of custom fields and participate in discussion with users across the organisation. This is preferable to having each individual do their own thing using custom fields, oblivious to problems this may cause when project files are consolidated or saved to databases.

Hopefully over time, as you and your colleagues become more competent and demanding in your use of Microsoft Project, you will be able to continuously enhance and improve the content of your CST file making it even more useful to you as a management tool. ◀

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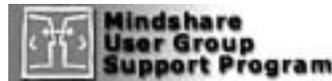
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