Index

Symbols
% complete field, 459-460
%Work complete, 460
24-hour calendars, 103

A
accrual methods
costs, 307, 471
setting, 326
Actual cost + Remaining cost = Cost, 46
actual cost of work performed (ACWP)
field, 506
actual costs
calculating, 307, 469
editing, 335-337
field, 466, 505
setting up, 469-470
actual duration
field, 462-463
tracking, 481-482
Actual Duration + Remaining Duration = Duration, 463
Actual Duration + Remaining Duration = Work, 44-45
Actual finish date field, 461
actual start dates
field, 461
resources, leveling, 407
actual value, 40
actual work
baselines, 436
tracking
day-by-day, 484-485
per period, 483-484
Actual work field, 463-466
daily hours, 465-466
data, entering
day-by-day, 484-485
per period, 483-484
period hours, 464
Actual Work + Remaining Work = Work, 44, 466
actual work time, 16
ACWP (actual cost of work performed)
field, 506
adding. See also setting
baseline fields, 444
blank rows, 59
budgets
accrual methods, 326
Fixed costs, 322-323
overtime costs, 325-326
resources, 323-325
work resources, 278-279
columns, 79
Resource Sheet view, 243
views, 26
constraints to schedules, 419
contingencies, 380-381
costs
examples, 310-311
labor, 308
nonlabor, 308
overall budget, 309
deadlines, 148, 184-185
different rates to resources, 329-330, 333
document references, 378
effort, 15
estimates, 265-267
duration-based, 267-270
effort-based, 271-277
House Painting example, 289-290
extra days/time, 380
holidays to calendars, 101
Project 2002/2003, 105
Project 2007, 103-104
labor costs, 316
hourly rates for resources, 317
per use costs for resources, 317-318
milestones, 183
nonlabor costs
cost resource, 320-321
Fixed cost, 320
material resources, 319
nonworking time to calendars, 101
Project 2002/2003, 105
Project 2007, 103-104
notes, 378
Project summary task, 114-116
reserves, 380
resources, 4
ad hoc warnings, 238
House Painting example, 288
methodology, 567
Resource Sheet, 238-239
resources to tasks, 252, 258
Assign Resources dialog box, 258-260
duration-based scheduling, 253
effort-based scheduling, 253
Resource Name field (Gantt Chart view), 262
Resources tab (Multiple Task Information dialog box), 262
Roofing project example, 264-265
split window, 261
status bar, 474
tasks, 118, 379
outlining, 116-119
task notes, 121-122
text to bars, 538
toolbars, 54
values, 170
Advanced tab (Task Information dialog box), 144
ALAP (As Late As Possible) constraint, 152, 155-156
All tab (Visual Reports – Create Report dialog box), 509
allocating resources, 392
analogous estimating, 303
Analysis toolbar, 365
analyzing stakeholders, 7
As Late As Possible (ALAP) constraint, 152, 155-156
ASAP constraint (As Soon As Possible), 152, 157
Assign Resources button, 66
Assign Resources dialog box, 66, 258-260
assigning calendars to tasks, 107
Assignment Information dialog box, 33, 392
assignment units
customizing, 254
decimal, 254
percentage, 254
resources, 256-258
assignments, 30
  baselines, 434
  filtering, 360-363
  grouping, 358-359
  information
    entering/reviewing, 32
    viewing, 62
attributes
  reviewing, 351
  setting, 112-113
  tasks, 3
audit tables, 373-375
authorization, 88-89
automated leveling feature, 393-395, 404-405
  assigned units, changing, 395
  performing, 414-415
  resources, adding, 395
settings, 403-405
  leveling settings, 407-410
  Project leveling decisions, 411
  Project settings, 406-407
  resource leveling flags, 413
  tasks, linking, 394
automation
  filtering, 362
  scheduling changes calculations, 42
availability
  calendars, 110
  resources, 48, 247

B
BAC (Budget at completion) field, 506
Bar Styles, 357, 537-538
Bar styles command (Format menu), 537
Bar Styles dialog box, 537
Baseline tables, 443
Baseline values, 41
baselines
  Actual work/Remaining work, 436
  assignments, 434
  Baseline cost, 434
  clearing, 441-442
  defined, 433
  fields, 433-434
    adding, 444
    cost field, 434
  formulas, 432
  House Painting example, 448-449
  methodology, 568
  multiple, 435, 444
  reviewing, 441
  schedules, 4
  setting, 437-438
  tasks, 434, 439-441
  viewing, 434, 442
    assignments, 444
    multiple, 444
    split window, 443
    Tracking Gantt view, 436, 442
    Work table, 442
basis for leveling settings, 407
BCWP (budgeted cost of work performed) field, 506
BCWS (budgeted cost of work scheduled) field, 506
behaviors. scheduling, 144
blank rows, 59
bottom-up estimating, 304
Budget at completion (BAC) field, 506
budgeted cost of work performed (BCWP) field, 506
budgeted cost of work scheduled (BCWS) field, 506
budgets, 301
costs
  accrual methods, 307
calculating, 305-307
Cost resource, 312
estimating, 303-304
examples of entering, 310-311
formula, 306
hiding, 316
labor, 308
nonlabor, 308
overall, entering, 309
selecting, 313
tracking, 307
viewing, 314-315
currencies, 304
Earned Value Cost Indicators Table, 507
Earned Value Schedule Indicators Table, 508
Earned Value Visual Report, 509-510
fields, 42
Fixed cost, 322-323
resource, 241, 313
  accrual methods, 326
  entering, 323-325
  House-Painting example, 343
  overtime costs, 325-326
  work resources, 278-279
reviewing, 420
Roofing project example, 327-329
viewing, 333

C
calculating
costs, 46, 305-307, 468
  actual, 307, 469
  formula, 306
resource, 47
duration, 44
scheduling changes, 42
work, 169
Calculation tab (Options dialog box), 350, 469, 564
Calendar tab (Options dialog box), 350, 560
Calendar view, 368
calendars. See also schedules
  24-hour, 103
  assigning to tasks, 107
  availability, 110
  copying, 109-110
  creating, 101-106
  customizing, 101
  days, selecting, 108
  end dates, 113
  holidays, adding, 101
  Project 2002/2003, 105
  Project 2007, 103-104
  methodology, 567
  Night Shift, 103
  nonworking time, 101-102
  Project 2002/2003, 105
  Project 2007, 103-104
  options, 560
  pre-existing, 111
  resetting, 106
  resources, 248-249
  effects on scheduling, 255
  reviewing, 353
  standard, 101, 111
  start dates, 112
  task, 163-164, 185-186, 351
  viewing in Project Guide, 546
  working time, 107-108
Can level column (Resource sheet), 413
case study (VNLE project)
  baselines, 449
  budget resources, 345
  closing, 532-533
  deadlines, 191
  estimates, adding, 293-294
  linking tasks, 230-232
  milestones, 190
predecessors, 233
reporting, 518
resources
  adding, 292-293
  assignments, 295
  rates, 344-345
reviewing, 387
schedule, reviewing, 426-428
sequencing tasks, 228-230
successors, 230
task types, 191
tracking, 516-518
WBS, 190
Change highlighting, 356, 372
Change Working Time command (Tools menu), 103
Change Working Time dialog box, 103, 248
changing. See customizing
charters, creating, 88-89
critical paths
  Roofing project example, 219
tasks, linking, 220-221
Clear Baseline dialog box, 442
clearing baselines, 441-442
Close command (File menu), 84
closing
guidelines, 525-526
House Painting project, 531-532
methodology, 569
milestones to 100%, setting, 524
projects, 11, 84
remaining work, 523
schedules, 5, 522-523
summary task notes, 524
tasks, 523
view, 525
Code field, 247
codes (resources), 247
collapsing outlines, 119
Column Definition dialog box, 26, 79
columns. See also fields
  adding, 26, 79
  Can level (Resource sheet), 413
  hiding, 29
  Indicator, 66-67
  moving, 556
  Predecessors, 217-218
  Successors, 217-218
task information, viewing, 139-140
Total cost. See Cost field, 305
commands
  Edit menu, Split Task, 402
File menu
  Close, 84
  New, 95
  Open, 97
  Print Preview, 371
  Save, 96
  Save As, 126
Format menu
  Bar styles, 537
  Detail styles, 444
  Format bar, 536
  Gantt Chart Wizard, 282, 539
  Gridlines, 474, 542
  Layout, 542
Insert menu, Project, 212
Project menu
  Filter for, 360
  Filtered for, 494
  Filtered for, Milestones, 489
  Group by, 358, 497
  Group by, More groups, 497
  Outline, Indent, 119
  Outline, Outdent, 119
  Outline, Show, 119
  Project Information, 112
Reports, Visual Reports, 490  
Resource Information, 245  
Sort, 357  
Task drivers, 372  
Task Information, 142  
Reports menu, Visual Reports, 366, 509  
Tools menu  
Change Working Time, 103  
Customize, 165, 250  
Customize, Toolbars, 53, 552  
Level resources, 403  
Organizer, 110, 503  
Spelling, 349  
Tracking, 475  
Tracking, Clear baseline, 442  
Tracking, Set baseline, 437  
Tracking, Update project, 473  
View menu  
More views, 501  
PERT analysis, 381  
Resource Sheet view, 239  
Show change highlighting, 373  
Table: Work, 442  
Table, More tables, 374, 500  
Toolbars, 54  
Toolbars, Analysis, 365  
Toolbars, Project Guide, 545  
Tracking Gantt, 442  
View Bar, 55  
Views menu, More views, 75  
Window menu  
Remove Split, 60  
Split, 60, 443  
communication management, 8  
complete performance index, to field, 507  
Constraint Type field, 37  
constraints, 150-151  
ALAP, 152, 155-156  
ASAP, 152, 157  
available, 151  
FNET, 157-158  
FNLT, 153, 158-159  
grouping, 359  
MFO, 153, 159-160  
MSO, 154, 160-161  
resources, leveling, 407  
reviewing, 352  
schedules, 419  
SNET, 154, 161  
SNLT, 154, 162-163  
tasks  
effort-based scheduling, 14  
relationships, 152  
contingencies, 380-381  
contours, 392  
controlling project management processes, 11  
copying  
calendars, 109-110  
rows, 29  
tables, 500  
Cost = Actual Cost + Remaining Cost, 306, 468  
Cost field, 35, 305  
calculating, 468  
costs, entering, 309  
values  
Actual, 40  
Baseline, 41  
Current, 40  
Remaining, 41  
cost performance index field, 507  
Cost Rate Table, 330  
Cost resource, 241, 247, 312, 468  
entering, 308  
Fixed cost, 320  
House-Painting example, 342
material resources, 319
tasks, entering, 320-321
cost variance % field, 507
Cost variance field, 505
costs. See also budgets
accrual methods, 307, 326
actual
  calculating, 307, 469
  editing, 335-337
  field, 466, 505
  setting up, 469-470
Baseline cost, 434
Budget resource, 313
budgeting, 301
calculating, 305-307, 468
cost resource, 241, 247, 312, 468
  House-Painting example, 342
  nonlabor costs, 308
tasks, entering, 320-321
currencies, 304
duration-based scheduling, 334
earned value
  Earned Value Cost Indicators Table, 507
  Earned Value Schedule Indicators Table, 508
  Earned Value Table, 505-506
  Visual Report, 509-510
effort-based scheduling, 334
estimates, 4, 303-304, 567
examples of entering, 310-311
extra, adding, 381
fields, customizing, 322
fixed
  budgets, 322-323
  calculating, 46
  field, 468
  House-Painting project example, 341-342
  nonlabor costs, 308
  notes, 329
tasks, 320
formula, 306, 468
  Actual cost + Remaining cost = Cost, 46
  Standard rate of resource(s) assigned
  × Work hours = Cost of a task, 47
  hiding, 316
  labor
  entering, 308, 316
  hourly rates for resources, 317
  per use costs for resources, 317-318
methodology, 568
nonlabor
cost resource, 320-321
entering, 308
Fixed cost, 320
material resources, 319
overall budget, 309
overtime, 325-326
per use, 335
resources, 249
calculating, 47
different rates, 329-330, 333
House-Painting project example, 340-341
reviewing, 354, 420
Roofing project example, 327-329
rounding, 334
selecting, 313
sorting, 357
tracking, 307, 466
  accrual method, 471
  Actual costs, 469-470
  setting up, 469-471
viewing, 302, 314-315
Costs tab (Resource Information dialog box), 249
CPI (cost performance index), 507
Create Base Calendar dialog box, 109
critical paths, 4
deadline dates, 283
defined, 219
formatting, 282-283
House Painting example, 425-426
methodology, 567
reviewing, 354, 416-419
shortening, 418
text, formatting, 418
critical tasks, grouping, 359
currencies, viewing, 304
Current value, 40
Custom Fields dialog box, 165, 250
Custom Fields tab
Resource Information dialog box, 250-251
Task Information dialog box, 145
Customize command (Tools menu), 165, 250
Customize dialog box, 53
Customize, Toolbars command (Tools menu), 53, 552
customizing
actual costs, 335-337
assignment units, 254
calendars, 101
cost fields, 322
document references, 378
fields, 28, 556
multiple resources, 245
resources, 250-251
tasks, 145, 164-167
filters, 494-496
Gantt Chart view, 555
groups, 497-498
notes, 378
Project Guide, 550
reports, 499
custom tables, creating, 500
custom view, creating, 501-502
moving custom objects to Organizer, 503
resources, 380
Standard calendar, 111
tables, 500
tasks, 379
multiple data changes, 142
relationships, 204
text, 540
toolbars, 552
views, 479, 501-502
working time (calendars), 107-108
CV % (cost variance percentage), 507

D
data
entry, 57-59
exporting to Excel, 365-366
resources
availability, 247
calendar, 248-249
codes, 247
groups, 247
multiple changes, 244-245
names, 246
types, 247
structure
assignments, 30-32
columns, hiding, 29
fields, 26-28
Gantt Chart view, 25-28
resources, 30-31
tasks, 29-30
tasks
  custom, 145
  Estimated field, 143
  general, 144
  multiple changes, 142
  notes, 145
  relationships, 144
  resources, 144
  scheduling behaviors, 144
  viewing, 138-140
days
  adding to schedules, 380
calendars
  holidays, adding, 101
  nonworking, adding, 101-105
  selecting, 108
  working time, customizing, 107-108
  Timephased field, 39
deadlines, 148-150
  adding, 184-185
dates
  critical paths, 283
  methodology, 567
  field, 149
  reviewing, 352
  VNLE project case study, 191
decimal assignment units, 254
deleting
  columns, 29
  Project Guide side pane, 50
  split windows, 60, 83
  tasks, 122, 380
  toolbars, 54
dependencies (tasks), 201
  relationship types, 202
  sequencing, 201
Detail styles command (Format menu), 444
Detail Styles dialog box, 444
details
  Details For dialog box, 107
dialog boxes
  Assign Resources, 66, 258-260
  Assignment Information, 33, 392
  Bar Styles, 537
  Change Working Time, 103, 248
  Clear Baseline, 442
  Column Definition, 26, 79
  Create Base Calendar, 109
  Custom Fields, 165, 250
  Customize, 53
  Detail Styles, 444
  Details For, 107
  Filter for Using Resource, 361
  Format Bar, 536
  Gantt Chart Wizard, 282
  Gridlines, 474
  Insert Project, 212
  More Filters, 361, 494
  More Groups, 497
  More Tables, 374, 500
  More Views, 83, 501
  Multiple Resource Information, 245
  Multiple Task Information, 142, 262
  OK button, 79
  Open, 97
Options, 557
  Calculation tab, 350, 469, 564
  Calendar tab, 350, 560
  Edit tab, 566
  General tab, 566
  Interface tab, 564
  Save tab, 564
  Schedule tab, 350, 560-564
  Security tab, 565
  settings, 557-559
  Spelling tab, 349, 565
  View tab, 559-560
  Organizer, 110
Project Help, 34-35
Project Information, 112-113
   budgets, viewing, 333
   status dates, 472
Project Statistics, 333
Rename, 165
Reports, 493
Resource Information, 32, 239, 242
   Costs tab, 249
   Custom Fields tab, 250-251
   Notes tab, 250
Resource Leveling, 403, 406
   actual start dates, 407
   basis for leveling choices, 407
   Level only within available slack, 409
   Leveling can adjust individual
      assignments on a task, 409
   Leveling can create splits in remaining
      work setting, 410
   leveling orders, 408
   Priority field, 406
   resource leveling flags, 413
   task constraints, 407
Save As, 96
Set Baseline, 437
Table Definition, 374, 500
Task Information, 31, 122
   Advanced tab, 144
   Custom Fields tab, 145
   General tab, 144
   multiple task data changes, 142
   Notes tab, 145
   Predecessors tab, 144
   Resources tab, 144
   task information, viewing, 138-139
   tasks, linking, 198
Templates, 124
Update Project
   progress, tracking, 477-478
schedules, progressing, 473
View Definition, 501
Visual Reports – Create Report, 367, 509
document references, 378
double-clicking, 68, 554
drivers (task), 356, 371-372
duration
   Actual duration
      field, 462-463
      tracking, 481-482
calculating, 44
effort-driven tasks, 178-180
estimates, 274, 277
field, 35
   reviewing, 353
   tasks, 168-172
   values, 40-41
   Work field relationship, 175-177
Fixed, 173
   work formula, 176-178
   Work/Duration fields relationship,
      177
formula, 463
grouping, 359
milestones, 148
tasks
   Duration field, 168-172
duration-based scheduling, 19
effort-based scheduling, 12-13
tracking, 467, 479
   Actual duration/Remaining duration,
      481-482
done or not done, 479-480
   Percent complete, 480-481
duration-based estimates
   adding, 267-270
   tracking, 271
duration-based scheduling, 18-20
costs, entering, 334
resource assignments, 253
tracking, 467, 479
Actual duration/Remaining duration, 481-482
done or not done, 479-480
Percent complete, 480-481
Duration x Units = Work, 43-44

E
EAC (Estimate at completion) field, 506
earned value, 504-505
tables
   Earned Value Cost Indicators Table, 507
   Earned Value Schedule Indicators Table, 508
   Earned Value Table, 505-506
Visual Report, 509-510
Earned value field, 505
Edit, Split Task commands, 402
Edit tab (Options dialog box), 566
editing. See customizing
effort. See also work
   estimates, 169, 273
   formula, 466
tasks, adding, 15
tracking, 463-467, 482
   actual work day-by-day, 484-485
   actual work per period, 483-484
daily hours, 465-466
   period hours, 464
effort-based estimates
   adding, 271-277
Duration and Units estimates, 277
Effort and Units estimates, 273
Fixed work Task type, 275
Roofing project example, 273
tracking, 278
Work and Duration estimates, 274-275
Work and Units estimates, 273
Work formula variables, 272
effort-based scheduling, 11-18
actual work, tracking, 463-466
daily hours, 465-466
period hours, 464
constraints, 14
costs, entering, 334
resource assignments, 253
tasks
   actual work time, 16
defining, 12
effort (work), adding, 15
linking, 14
resources, 15
tracking, 467, 482
   actual work day-by-day, 484-485
   actual work per period, 483-484
examples, 454-457
work duration, 12-13
Effort-driven field, 37, 172
Advanced tab, 173
Gantt Chart, 173
Task Form view, 174
effort-driven tasks, 172, 178-180
Advanced tab, 173
Gantt Chart, 173
Task Form view, 174
End date – Start date = Duration, 45
end dates
   leads/lags effect on, 280-281
setting, 113
entering. See also adding
data, 57-59
resource information, 31-32
task information, 30
Entry mode, 57-59
Entry table, 76

Entry table, 76
equipment resources, 240
error checking
attributes, 351
constraints, 352
costs, 354
critical path, 354
deadlines, 352
Duration field, 353
filtering, 385-386
grouping, 384-385
milestones, 352
preferences, 350-351
resource calendars, 353
resources, 353
schedules, 348-349
spelling, 349
styles, 350
summary tasks, 351
tasks, 351
calendars, 351
relationships, 352
types, 352
Work field, 353
workloads, 354
Estimate at completion (EAC) field, 506
Estimated field, 143
estimates
adding example, 265-267
costs, 4, 303-304
duration-based
adding, 267-270
tracking, 271
effort-based
adding, 271-277
Duration and Units estimates, 277
Effort and Units estimates, 273
Fixed work Task type, 275
Roofing project example, 273
tracking, 278
Work and Duration estimates,
274-275
Work and Units estimates, 273
Work formula variables, 272
House Painting example, 265-267,
289-290
methodology, 567
PERT method, 381
schedule reviews, 376
working time, 4
eexecuting processes, 10
expanding outlines, 119
exporting data to Excel, 365-366
exposing fields, 26-27, 79

F
facilities resources, 240
FF (finish-to-finish) relationship, 203
fields. See also columns
Actual costs, 466
Earned Value Table, 505
setting up, 469-470
Actual duration, 462-463
Actual finish date, 461
Actual start date, 461
Actual work, 463-466
daily hours, 465-466
data, entering, 483-485
period hours, 464
baseline, 433-434, 444
Baseline cost, 434
Baseline value, 41
budget, 42
Code, 247
Constraint Type, 37
Cost, 35, 305
Actual value, 40
Baseline value, 41
calculating, 468
costs, entering, 309
Current value, 40
customizing, 322
Remaining value, 41
viewing, 305
Cost resource, 468
customizing, 28, 245, 556
Deadline, 149
definitions, 36
Duration, 35
Actual value, 40
Baseline value, 41
Current value, 40
Remaining value, 41
reviewing, 353
tasks, 168-172
Work field relationship, 175-177
Earned Value Cost Indicators Table, 507
Earned Value Schedule Indicators Table, 508
Earned Value Table, 505
Effort-driven, 37, 172
Advanced tab, 173
Gantt Chart, 173
Task Form view, 174
Estimated, 143
exposing, 26-27, 79
Finish, 36
Actual value, 40
Baseline value, 41
Current value, 40
Remaining value, 41
Fixed cost, 468
budgets, 322-323
House-Painting project example, 341-342
nonlabor costs, 308
notes, 329
tasks, 320
Group, 247
grouping, 355, 359
help, 34
Hide task bar, 144
hovering over, 553
Material cost, 308
Material resources, 468
Per Use Cost, 335
Percent Complete, 144, 459-460
Percent Work complete, 460
Physical % complete, 461
Predecessor, 36, 198
Priority, 144, 406
renaming, 165
Resource Availability, 247
Resource name, 246, 262
resources, 250-251
Roll up Gantt bar to summary, 144
schedule, 42
selecting, 28
sorting, 355-357
Start, 36
Actual value, 40
Baseline value, 41
Current value, 40
Remaining value, 41
Status date, 472
status bar, setting, 474-475
viewing, 472-474
Successors, 36
Task Information dialog box
Advanced tab, 144
Custom Fields tab, 145
General tab, 144
Notes tab, 145
Predecessors tab, 144
Resources tab, 144
Task Type, 37, 172
Advanced tab, 173
Index

Gantt Chart, 173
Task Form view, 174
tasks
customizing, 164-167
multiple changes, 142
viewing, 138-140
Timephased, by, 38
day, 39
half day, 39
hourly, 40
minutes, 40
month, 39
week, 39
tracking
Actual cost, 466
Actual duration, 462-463
Actual work, 463-466
Physical % complete, 461
progress, 458-461
selecting, 466-467
Type, 247
Units, 36
viewing, 243
Work, 35
Actual value, 40
Baseline value, 41
Current value, 40
Duration field relationship with, 175-177
Remaining value, 41
reviewing, 353
tasks, 169-172
Work contour, 38
Work resources, 468
Workgroup, 248
File menu commands
Close, 84
New, 95
Open, 97
Print Preview, 371
Save, 96
Save As, 126
files
changes, saving, 99
creating, 95
formats, 99-100
naming, 98
opening, 97-98
Project summary task, adding, 114-116
saving, 96
Fill Down capability (resources), 245
Filter for command (Project menu), 360
Filtered for, Milestones command (Project menu), 489
Filtered for, Milestones command (Project menu), 489
Finding templates, 124
Finish dates, 461
Finish field, 36, 40-41
Finish No Earlier Than (FNET) constraint, 153, 157-158
Finish No Later Than (FNLT) constraint, 153, 158-159
finish-to-finish relationship, 203
finish-to-start relationship, 202, 206
fixed costs
budgets, 322-323
calculating, 46
field, 468
House-Painting project example, 341-342
nonlabor costs, 308
notes, 329
tasks, 320
Fixed duration, 173
work formula, 176-178
Work/Duration fields relationship, 177
Fixed units, 173-175
resources, 174
work formula, 174
Work/Duration fields relationship, 175
Fixed work, 173
Fixed work Task type, 275
flags (resource leveling), 413
FNET (Finish No Earlier Than) constraint, 153, 157-158
FNLT (Finish No Later Than) constraint, 153, 158-159
Format bar, 536
Format bar command (Format menu), 536
Format Bar dialog box, 536
Format menu commands
Bar styles, 537
Detail styles, 444
Format bar, 536
Gantt Chart Wizard, 282, 539
Gridlines, 474, 542
Layout, 542
formatting
critical paths, 282-283
files, 99-100
Gantt Chart bars, 536
Bar styles, 537-538
Format bar, 536
Gantt Chart Wizard, 538-541
gridlines, 542
layout, 542
nonworking time, 542
printing, 510
task notes, 122
text, 355-357, 418, 544
timescale, 543
toolbars, 552
Formatting toolbar, 53-54, 551
formulas
baseline, 432
costs, 306, 468
Actual cost + Remaining cost = Cost, 46
Standard rate of resource(s) assigned × Work hours = Cost of a task, 47
duration, 463
scheduling, 43
Actual Duration + Remaining
Duration = Work, 44-45
Actual Work + Remaining Work = Work, 44
Duration × Units = Work, 43-44
End date – Start date = Duration, 45
work
effort-based estimates, 272, 466
Fixed duration, 176-178
Fixed units, 174
FS (finish-to-start) relationship, 202, 206
G
Gantt Chart view, 25, 49
bars, formatting, 536
Bar styles, 357, 537-538
Format bar, 536
Gantt Chart Wizard, 538-541
baseline fields, 433-434
budgets, viewing, 333
cost fields, viewing, 305
critical paths, viewing, 282-283
customizing, 555
deadline markers, 149
double-clicking/right-clicking, 554
  fields
    customizing, 28
    exposing, 26-28
gridlines, 542
layout, 542
nonworking time, 542
overview, 70-71
Predecessors/Successors columns, 217-218
Resource Name field, 262
status bar, adding, 474
Task type and Effort driven fields, 173
timescale, 543
Gantt Chart Wizard, 282
  bars, formatting, 538-541
critical paths, reviewing, 417
  options, 539
tasks, linking, 541
text, customizing, 540
Gantt Chart Wizard command (Format menu), 282, 539
Gantt Chart Wizard dialog box, 282
General tab
  Resource Sheet view, 246-247
Options dialog box, 566
Task Information dialog box, 144
generic resources, 241
graphs
  Project 2002/2003, 365-366
  Resource, 397
  schedules, reviewing, 355, 364
Visual Reports, 366-368
gridlines, formatting, 542
Gridlines command (Format menu), 474, 542
Gridlines dialog box, 474
Group by command (Project menu), 358, 497
  Group by, More groups command (Project menu), 497
  Group field, 247
  groups, 358-359
    customizing, 497-498
    editing, 499
    error checking with, 384-385
    fields, 355, 359
    reporting, 496-498
    resources, 247
    roll-up reports, 489
tasks, linking, 206
H
  half days, 39
Help, 570
  fields, 34
tips/screen tips/Indicator column, 66-67
Hide task bar field, 144
hiding
  columns, 29
costs, 316
  Project Guide, 50, 545
tasks, 119-121
holidays, adding to calendars, 101
  Project 2002/2003, 105
  Project 2007, 103-104
hours
  rates (resources), 317
  Timephased field, 40
hovering over fields, 553
I
  ID only leveling order, 408
indenting tasks, 119
  Indicator column, 66-67
Information button, 62
  initiating project management processes, 10
Insert menu commands (Project), 212
Insert Project dialog box, 212
interface (Project)
  data entry, 57-59
  Indicator column, 66-67
  menu bar, 51-53
  navigation tools, 51
  opening screen, 49-50
  Project Guide side pane, 50
right-clicking/double-clicking, 68
screen tips, 66-67
separator bar, 51
split window, 60
task pane, 50
tips, 66-67
toolbars, 53-54
  Information button, 62
  Link Tasks button, 62
  Scroll to Task button, 64-66
  Unlink Tasks button, 62
  Zoom In button, 63-64
  Zoom Out button, 63-64
view bar, 55-56
Interface tab (Options dialog box), 564
interim plans, saving, 437

K – L

keyboard shortcuts, 554

labor costs
  entering, 308, 316
  hourly rates for resources, 317
  per use costs for resources, 317-318
lags, 216
  creating, 225-226
  effects on schedule end dates, 280-281
House Painting example, 291
methodology, 567
task relationships, 215-217

layout, formatting, 542
Layout command (Format menu), 542
leads, 215
  creating, 225-226
effects on schedule end dates, 280-281
House Painting example, 291
methodology, 567
task relationships, 215-217
Level resources command (Tools menu), 403
leveling
  automatically, 393, 404-405
  assigned units, changing, 395
  performing, 414-415
  resources, adding, 395
  settings. See automated leveling feature, settings
tasks, linking, 394
basis for leveling settings, 407
manually, 400-402
orders, 408-409
resources, 113, 394-395
  assigned units, changing, 395
  resources, adding, 395
tasks, linking, 394
settings
  leveling settings, 407, 410-411
  project settings, 406-407
resource leveling flag, 413
slack, 409
tasks, splitting, 410
Leveling Gantt view, 412
Link Tasks button, 62, 196-198
linking tasks
  backward, 200
  between
    groups, 206
    projects, 211-214
critical paths, 220-221
effort-based scheduling, 14
finish-to-start relationship, 206
Link Tasks button, 62, 196-198
methodology, 567
network diagrams, 210
non-sequential, 197
Predecessor field, 198
resource leveling, 394
Scroll to Task button, 64-66
sequencing, 196, 207
split window, 199-201
summary tasks, 205
Task Information dialog box, 198
troubleshooting, 379
Unlink Tasks button, 62
Zoom In button, 63-64
Zoom Out button, 63-64

M
management
  closing projects, 11
  communication, 8
  execution, 10
  initiating processes, 10
  monitoring/controlling processes, 11
  performance reporting, 8
  planning, 10
  procurement, 8
  resources, 10
  risks, 7
  schedules, 6
  scope, defining, 7
  stakeholder analysis, 7
  team development, 9
Material cost field, 308
Material resource, 240, 247
costs, 308, 319
field, 468
Maximum units, 256

menu bar, 51-53
methodologies
  baselines, 568
  calendars, 567
  costs, 568
  critical paths, 567
deadlines dates, 567
  estimates, 567
  leads/lags, 567
  milestones, 567
  planning, 566-568
  project team, 567
  resource assignments, 567
  reviewing schedules, 568
tasks, reviewing, 567
MFO (Must Finish On) constraint, 153,
  159-160
Microsoft Project Association (MPA), 570
milestones, 146-148
  adding, 183
  grouping, 359
  methodology, 567
  report, 488-489
  reviewing, 352
  setting to 100% complete, 524
VNLE project case study, 190
minutes (Timephased field), 40
monitoring project management
  processes, 11
months (Timephased field), 39
More Filters dialog box, 361, 494
More Groups dialog box, 497
More Tables dialog box, 374, 500
More views command (View menu),
  75, 501
More Views dialog box, 83, 501
moving
  columns, 556
custom objects, 503
MPA (Microsoft Project Association), 570
.mpp file extension, 99
.mpt file extension, 99
MSO (Must Start On) constraint,
154, 160-161
Multiple Resource Information dialog box, 245
Multiple Task Information dialog box,
142, 262
multiple Undo feature, 372
Must Finish On (MFO) constraint, 153,
159-160
Must Start On (MSO) constraint,
154, 160-161

N
names
fields, 165
Project files, 98
resources, 246
tasks, 118
navigating Project, 51
data entry, 57-59
Indicator column, 66-67
menu bar, 51-53
navigation tools, 51
opening screen, 49-50
Project Guide side pane, 50
right-clicking/double-clicking, 68
screen tips, 66-67
separator bar, 51
split window, 60, 82-83
task pane, 50
Task Usage view, 83
tips, 66-67
toolbar buttons, 62-66
toolbars, 53-54
view bar, 55-56
views
Gantt Chart, 70-71
More Views, 75
Resource Sheet, 71-72
Resource Usage, 73-74
Task Usage, 72
Tracking Gantt, 74-75

network diagrams, 208-210, 226-227
New command (File menu), 95
newsgroups, 570
Night Shift calendars, 103
nonlabor costs, 241, 247, 312, 468
cost resource, 320-321
entering, 308
Fixed cost, 320
House-Painting example, 342
material resources, 319
tasks, entering, 320-321
nonworking time
adding to calendars, 101-102
Project 2002/2003, 105
Project 2007, 103-104
viewing, 542
notes
adding/changing, 378
Fixed costs, 329
resources, 250
tasks
adding, 121-122
closure, 524
Notes tab
Resource Information dialog box, 250
Task Information dialog box, 145

O
OK button (dialog boxes), 79
Open command (File menu), 97
Open dialog box, 97
opening
  pre-existing calendars, 111
  Project files, 97-98
optimizing schedules, 4
Options dialog box, 557
  settings, 557-559
tabs
  Calculation, 350, 469, 564
  Calendar, 350, 560
  Edit, 566
  General, 566
  Interface, 564
  Save, 564
  Schedule, 350, 560-564
  Security, 565
  Spelling, 349, 565
  View, 559-560
orders (leveling), 408-409
Organizer, 503
Organizer command (Tools menu), 110, 503
Organizer dialog box, 110
outdenting tasks, 119
Outline, Indent command (Project menu), 119
Outline, Outdent command (Project menu), 119
Outline, Show command (Project menu), 119
outlines
  expanding/collapsing, 119
  tasks
    adding, 116-119
    indenting, 119
    outdenting, 119
    viewing/hiding, 119-121
WBS outline Web site, 124
outlining buttons (toolbars), 119
overallocating
  automatic leveling, 393, 404-405, 414-415
  House Painting example, 423-425
  leveling resources, 394-395
    assigned units, changing, 395
    leveling settings, 407, 410
    manually, 400-402
  Project leveling decisions, 411
    project settings, 406-407
    resource leveling flags, 413
  resources, adding, 395
  tasks, linking, 394
reducing, 391
  Resource Usage view, 391
resources, 49, 376
  task resource assignments, 391
  viewing, 396, 400
    Resource Graph, 397
    Resource Usage view, 396
    split window view, 399
    Task Usage view, 398
overtime costs, 325-326
P
  parametric estimating, 304
people resources, 240
  per use costs, 308, 317-318, 335
Percent Complete field, 144, 459-460
  percent complete values, 19
Percent Work complete field, 460
  percentage assignment units, 254
performance reporting, 8
PERT (Program, Evaluation, and Review Technique), 381
  Physical % complete field, 461
Planned value field, 505
planning
  methodology, 566-568
communication, 8
executing, 10
initiating, 10
monitoring/controlling, 11
performance reporting, 8
planning, 10
procurement, 8
resources, 10
risks, 7
scope, defining, 7
stakeholder analysis, 7
team development, 9

Project menu commands
Filter for, 360
Filtered for, Milestones, 489
Filtered for, More filters, 494
Group by, 358, 497
Group by, More groups, 497
Outline, Indent, 119
Outline, Outdent, 119
Outline, Show, 119
Project Information, 112
Reports, Visual Reports, 490
Resource Information, 245
Sort, 357
Task drivers, 372
Task Information, 142

projects
closing, 11, 84
creating, 79
scope
   defining, 7
   identifying, 3
templates
   creating from completed projects, 527-528

Options settings, 558
updating, 529
WBS, 3

Q – R
QuantumPM QSA (QuantumPM Schedule Auditor), 348

recurrences (nonworking time), 104
references (documents), 378

relationships
tasks
   changing, 204
   constraints, 152
   creating, 204-205, 224-225
   creating with network diagrams, 208-210, 226-227
   defining, 3
   finish-to-finish, 203
   finish-to-start, 202, 206
   leads/lags, 215-217, 225-226
   Predecessors tab, 144
   reviewing, 352
   start-to-finish, 204
   start-to-start, 203

Work and Duration fields, 175-177
Remaining duration, 481-482
Remaining value, 41
Remaining work, 436

Remove Split command (Window menu), 60
Rename Field dialog box, 165
renaming fields, 165
Report menu commands (Visual Reports), 366
Report pane (Project Guide), 548-550

reports
   bar chart text, 538
customizing, 499
moving custom objects to Organizer, 503
tables, creating, 500
view, creating, 501-502
Earned Value, 504-505
Earned Value Cost Indicators Table, 507
Earned Value Schedule Indicators Table, 508
Earned Value Table, 505-506
Visual Report, 509-510
filtering, 493-496
grouping, 496-498
House Painting example, 515-516
list of, 486
performance, 8
methodology, 568
milestone, 488-489
printing, 370, 492, 510
Progress, 487-488
Project Guide Report pane, 548-550
roll-up, 489
schedules, reviewing, 355, 370
selecting, 493
Visual Reports, 366-368, 490-492, 509-510
Reports dialog box, 493
Reports menu commands (Visual reports), 509
Reports, Visual Reports command (Project menu), 490
reserves, adding, 380
resetting calendars, 106
Resource Allocation view, 369
Resource Availability field, 247
Resource Graph, 397
Resource Information command (Project menu), 245
Resource Information dialog box, 32, 239, 242
Costs tab, 249
Custom Fields tab, 250-251
Notes tab, 250
Resource Leveling dialog box, 403, 406
actual start dates, 407
basis for leveling choices, 407
Level only within available slack check box, 409
Leveling can adjust individual assignments on a task check box, 409
Leveling can create splits in remaining work setting, 410
leveling orders, 408
Priority field, 406
resource leveling flags, 413
task constraints, 407
Resource name field, 246, 262
Resource Sheet view, 31
accrual methods, 326
budget resources, 323
Can level column, 413
columns, adding, 243
costs, entering, 310-311
double-clicking/right-clicking, 554
General tab, 246-247
overtime costs, 325
overview, 71-72
resources, 238-239
Resource Sheet view command (View menu), 239
Resource Usage view, 32, 80
overallocation, 391, 396
overview, 73-74
schedules, reviewing, 369
resources, 30
  adding, 4
    ad hoc warnings, 238
    House Painting example, 288
    Resource Sheet, 238-239
  allocating, 392
  assigning, 252, 258, 567
    Assign Resources dialog box, 258-260
    duration-based scheduling, 255
    effort-based scheduling, 253
    Resource Name field (Gantt Chart view), 262
    Resources tab (Multiple Task Information dialog box), 262
    Roofing project example, 264-265
    split window, 261
  availability, 48, 247
  budget, 241, 313
    accrual methods, 326
    entering, 323-325
    House-Painting example, 343
    overtime costs, 325-326
    work, 278-279
  calendars, 248-249
    effects on scheduling, 255
    reviewing, 353
  codes, 247
  cost, 47, 241, 247-249, 312
    calculating, 47
    different rates, 329-333
    House-Painting example, 340-342
    nonlabor costs, 308
    tasks, entering, 320-321
    tracking, 466
  custom fields, 250-251
  customizing, 380
  double-clicking/right-clicking, 554
  duration-based estimates, 267-271
  effort-based estimates, 271-277
  Duration and Units, 277
  Effort and Duration, 274
  Effort and Units, 273
  Fixed task type, 275
  tracking, 278
  Work and Duration, 275
  Work and Units, 273
  Work formula variables, 272
effort-driven designation, 178-180
  filtering, 355, 360-363
  Fixed units, 174
generic, 241
  grouping, 247, 358-359
  Help, 570
  hourly rates, 317
  information
    entering, 31
    reviewing, 31
    viewing, 62
  leads/lags, 291
  leveling, 113, 394-395
    assigned units, changing, 395
    automatically. See automated leveling feature
    flags, 413
    leveling settings, 407, 410
    manually, 400-402
    Project leveling decisions, 411
    project settings, 406-407
    resource leveling flag, 413
    resources, adding, 395
    tasks, linking, 394
  Material, 240, 247
  costs, 308, 319
  field, 468
  Microsoft Project home page, 570
  Microsoft Project newsgroups, 570
  MPA, 570
multiple data changes
  Fill Down capability, 245
  Multiple Resource Information dialog box, 244
names, 246
notes, 250
overallocation, 49, 376
  automatically leveling, 414-415
  House Painting example, 423-425
  leveling, 393-395, 400-407, 410-413
  reducing, 391
  Resource Usage view, 391
  task resource assignments, 391
  viewing, 396, 400
per use costs, 317-318
pools, 283-285
project management, 10
reviewing, 355
search engines, 570
selecting, 246
sharing, 283-285
sorting, 357
tasks, 144
  effort-based scheduling, 15
  overallocation, 391
types, 247
units, 48
  assignment, 256-258
  effects on scheduling, 254-255
  maximum, 256
viewing, 238, 242
  adding columns to Resource Sheet, 243
  Resource Information dialog box, 242
  tables, 243-244
Work, 240, 247
Resources tab
  Multiple Task Information dialog box, 262
  Task Information dialog box, 144
reviewing. See also tracking
attributes, 351
baselines, 442-444
budgets, 420
constraints, 352
costs, 354, 420
critical paths, 354, 416-419
deadlines, 352
methodology, 568
milestones, 352
overallocation
  Resource Graph, 397
  Resource Usage view, 396
  Split Window view, 399
  Task Usage view, 398
preferences, 350-351
resources, 353
calendars, 353
information, 31-32
schedules, 4, 354-356
  audit tables, 373-375
  Change highlighting, 356, 372
  checklist, 376-377
  error checking, 348-349
  estimates, 376
  filtering, 355, 360-363, 385-386
  formatting text, 355-357
  graphs, 355, 364
  grouping, 355, 358-359, 384-385
  manually, 356
  overallocation, 376
  overview, 376
  printing, 370
  reports, 355, 370
  sorting, 355-357
  task drivers, 356, 371-372
  views, 355, 363, 368-369
spelling, 349-350
styles, 350
summary tasks, 351
tasks, 351
  baselines, 441
calendars, 351
information, 30
methodologies, 567
relationships, 352
types, 352
WBS, 94
workloads, 354
right-clicking, 68, 554
risk management, 7
Roll up Gantt bar to summary field, 144
roll-up reports, 489
rounding costs, 334
rows
  blank, 59
copying, 29
rules, scheduling, 24-25

S
Save As command (File menu), 126
Save As dialog box, 96
Save command (File menu), 96
Save tab (Options dialog box), 564
saving
  files, 96, 99
  filters, 363
  interim plans, 437
  templates, 126-128, 527-528
schedule fields, 42
schedule performance indicator (SPI) field, 508
Schedule tab (Options dialog box), 350, 560-564
schedule variance % field, 508
Schedule variance field, 505
schedules. *See also* calendars
  automatically calculating, 42
baselines, 4, 433
  Actual work/Remaining work, 436
  assignments, 434
  Baseline cost, 434
  clearing, 441-442
  fields, 435-434
  formulas, 432
  House Painting example, 448-449
  methodology, 568
  multiple, 435, 444
  reviewing, 441
  schedules, 4
  setting, 437-438
  tasks, 434, 439-441
  viewing, 434-436, 442-444
behaviors, 144
changes, viewing, 448-449
setting, 448
  multiple, 435
  reviewing, 441
  setting, 437-438
  tasks, 434, 439-441
  viewing, 434, 442-444
closing, 5, 522
  guidelines, 525-526
  House Painting project, 531-532
  methodology, 569
  milestones to 100%, 524
  remaining work, 524
  summary task notes, 524
tasks, 523
  view, 525
configuration settings, 560-564
constraints, adding, 419
contingencies, 380-381
duration-based, 18-20
costs, entering, 334
resource assignments, 253
tracking, 467, 479-482
effort-based, 11-18
  actual work time, 16
  actual work, tracking, 463-466
  constraints, 14
  costs, entering, 334
  effort (work), adding, 15
  linking tasks, 14
  resource assignments, 253
  resources, 15
  tasks, defining, 12
  tracking, 454-457, 467, 482-485
  work duration, 12-13
end dates, 113, 280-281
error checking, 348-349
estimates
  adding, 265-267
  duration-based, 267-270
  effort-based, 271-277
extra costs, adding, 381
extra days/time, 380
formulas, 43
  Actual Duration + Remaining Duration = Work, 44-45
  Actual Work + Remaining Work = Work, 44
  Duration x Units = Work, 43-44
  End date – Start date = Duration, 45
managing, 6
optimizing, 4
planning, 566-568
progressing, 473
reserves, 380
resources, 380
reviewing, 4, 354-356
  audit tables, 373-375
  Change highlighting, 356, 372
  checklist, 376-377
  estimates, 376
  filtering, 355, 360-363, 385-386
formatting text, 355-357
graphs, 355, 364
grouping, 355, 358-359, 384-385
manually, 356
methodology, 568
overallocation, 376
overview, 376
printing, 370
reports, 355, 370
sorting, 355-357
task drivers, 356, 371-372
views, 355, 363, 368-369
rules, 24-25
setting up, 128-130
start dates, 112
tasks
  adding, 379
customizing, 379
deleting, 380
tracking, 5
  benefits, 453
custom views, 479
duration-based, 479-482
earned value, 504-510
effort-based, 482-485
effort-based whitepaper example, 454-457
  elements, 452
  fields, 458-467
  House Painting example, 513-514
  methodology, 568
  Project Guide views, 547
  status date bar, setting, 474-475
  status dates, 472-474
  Task Update tool, 475-476
  Tracking table with Tracking Gantt view, 476-477
  Update Project dialog box, 477-478
Index

scope
  defining, 7, 89-91
  identifying, 3
  statement, 90-91
screen tips, 66-67
Scroll to Task button, 64-66
Security tab (Options dialog box), 565
selecting
  calendar days, 108
  costs, 313
  currencies, 304
  fields, 28
  filters, 494
  progress tracking fields, 466-467
  reports, 493
  resources, 246
sequencing tasks, 207
  network diagrams, 208-210, 226-227
  predecessors/successors, 201
Set Baseline dialog box, 437
setting. See also adding
  accrual methods, 326
  attributes
    end dates, 113
    Project Information dialog box, 112-113
    baselines, 437-438
    costs, tracking, 469-471
    accrual method, 471
    Actual costs, 469-470
    end dates, 113
    milestones to 100% complete, 524
    schedules, 128-130
    start dates, 112
    status date bar, 474-475
    task lists, 130-131
    task types, 186-187
settings, leveling
  leveling settings, 407, 410
Project leveling decisions, 411
project settings, 406-407
resource leveling flags, 413
SF (start-to-finish) relationship, 204
sharing resources, 283-285
shortcuts (keyboard), 554
shortening critical paths, 418
Show change highlighting command
  (View menu), 373
slack (leveling), 409
Smart Tags, 176, 554-555
SNET (Start No Earlier Than) constraint, 154, 161
SNLT (Start No Later Than) constraint, 154, 162-163
Sort command (Project menu), 357
sorting, 355-357
spell checking, 349
Spelling command (Tools menu), 349
Spelling tab (Options dialog box), 349, 565
SPI (schedule performance indicator) field, 508
Split command (Window menu), 60, 443
Split Task command (Edit menu), 402
Split Window view, 60, 82
  baselines, 443
  deleting, 83
  opening, 82
  overallocation, viewing, 399
  resources, assigning, 261
  tasks, linking, 199-201
splitting tasks, 402, 410
spreadsheets compared to projects, 2
SS (start-to-start) relationship, 203
stakeholder analysis, 7
standard calendars, 101, 111
Standard leveling order, 408
Standard rate of resource(s) assigned × Work hours = Cost of a task, 47
Standard rates, 308
Standard toolbar, 53-54, 551
Start dates
  actual, 407, 461
  setting, 112
Start field, 36, 40-41
Start No Earlier Than (SNLT) constraint, 154, 161
Start No Later Than (SNLT) constraint, 154, 162-163
start-to-finish relationship, 204
start-to-start relationship, 203
statements, 90-91
Status date field, 472
  status bar, setting, 474-475
  viewing, 472-474
status dates, 472
  status bar, setting, 474-475
  viewing, 472-474
styles, reviewing, 350
subtasks
  outlining, 116-119
  viewing/hiding, 119-121
successor tasks, 201
Successors column, 217-218
Successors field, 36
summary tasks
  closure notes, 524
  linking, 205
  outlining, 116-119
  reviewing, 351
  viewing/hiding, 119-121
SV % (schedule variance percentage)
  field, 508

T
Table Definition dialog box, 374, 500
Table, More tables command (View menu), 374, 500
Table: Work command (View menu), 442
tables, 75
  audit, 373-375
  Baseline, 443
  copying, 500
  Cost Rate, 330
customizing, 500
earned value
  Earned Value Cost Indicators Table, 507
  Earned Value Schedule Indicators Table, 508
  Earned Value Table, 505-506
Entry, 76
resources, viewing, 243-244
schedules, reviewing, 355, 363
task information, viewing, 140
Tracking, 76, 476-477
viewing, 76
Work, 442
Task drivers command (Project menu), 372
Task Form view, 174
Task Information command (Project menu), 142
Task Information dialog box, 31, 122
  Advanced tab, 144
  Custom Fields tab, 145
  General tab, 144
  multiple task data changes, 142
Notes tab, 145
Predecessors tab, 144
Resources tab, 144
tasks
  information, viewing, 138-139
  linking, 198
estimates, 169
fields, customizing, 164-167
filtering, 355, 360-363
general data, 144
grouping, 358-359
indenting, 119
information
entering, 30
viewing, 62, 138-140
labor costs, entering, 316-318
lags, 216, 225-226
effects on schedule end
dates, 280-281
House Painting example, 291
task relationships, 215-217
leads, 215, 225-226
effects on schedule end
dates, 280-281
House Painting example, 291
task relationships, 215-217
leveling adjustments, 409
linking
backward, 200
between groups, 206
between projects, 211-214
critical paths, 220-221
effort-based scheduling, 14
finish-to-start relationship, 206
Link Tasks button, 62, 196-198
methodology, 567
network diagrams, 210
non-sequential, 197
Predecessor field, 198
resource leveling, 394
Scroll to Task button, 64-66
sequencing, 207
sequentially, 196
split window, 199-201
summary tasks, 205
Task Information dialog box, 198
troubleshooting, 579
Unlink Tasks button, 62
Zoom In button, 63-64
Zoom Out button, 63-64
lists, 2, 91. See also WBS
milestones, 146-148
adding, 183
methodology, 567
reviewing, 352
naming, 118
nonlabor costs, entering
cost resource, 320-321
Fixed cost, 320
material resources, 319
notes, 145
adding/changing, 378
closure, 524
outdenting, 119
pane, 50
percent complete values, 19
predecessor, 201
priorities, 406
Project summary, 114-116
relationships, 144
changing, 204
constraints, 152
creating, 204-205, 224-225
creating with network diagrams,
208-210, 226-227
defining, 3
finish-to-finish, 203
finish-to-start, 202, 206
leads/lags, 215-217, 225-226
reviewing, 352
start-to-finish, 204
start-to-start, 203
resources, 144
adding, 567
assigning, 252-253, 258-265
effort-based scheduling, 15
overallocation, 391
reviewing, 353
reviewing, 351
attributes, 351
calendars, 351
constraints, 352
costs, 354
critical paths, 354
deadlines, 352
methodology, 567
milestones, 352
preferences, 350-351
relationships, 352
resources, 353
spelling checking, 349
styles, 350
summary tasks, 351
types, 352
Work/Duration fields, 353
workloads, 354
scheduling behaviors, 144
sequencing
network diagrams, 208-210, 226-227
predecessors/successors, 201
sorting, 357
splitting, 402, 410
successor, 201
summary
closure notes, 524
linking, 205
reviewing, 351
text, formatting, 544
types, 172
Advanced tab, 173
Fixed, 275
Fixed duration, 173, 177
work formula, 176-178
Fixed units, 173-175
Fixed work, 173
Gantt Chart, 173
reviewing, 352
setting, 186-187
Task Form view, 174
VNLE project case study, 191
viewing, 80
Work field, 169-172
resources, adding, 169
reviewing, 353
values, entering, 170
workloads, reviewing, 354
zero project summary task
line, 114-116
TCPI (to complete performance) field, 507
team development management, 9
templates, 123-124
creating from completed projects, 527-528
finding, 124
Project 2002, 124-125
Project 2003/2007, 125-126
Options settings, 558
saving, 126-128
updating, 126-128, 529
WBS, 93
Templates dialog box, 124
text
bar charts, 538
customizing, 540
formatting, 355-357, 418, 544
time
adding to schedules, 380
nonworking, 101-105
working, 107-108
Timephased field, 38
day, 39
half day, 39
hourly, 40
minutes, 40
month, 39
week, 39
timescales
  formatting, 543
  zooming in/out, 63
tips, 66-67
toolbars, 53-54
  adding/deleting, 54
  Analysis, 365
  customizing, 552
  Formatting, 53-54
  Information button, 62
  Link Tasks button, 62
  outlining buttons, 119
  Project Guide, 551-552
  Scroll to Task button, 64-66
  Standard, 53-54
  Unlink Tasks button, 62
  Zoom In button, 63-64
  Zoom Out button, 63-64
Toolbars command (View menu), 54
Toolbars, Analysis command (View menu), 365
Toolbars, Project Guide command (View menu), 545
tools
  navigation, 51
  QuantumPM QSA, 348
  Task Update, 475-476
Tools menu commands
  Change Working Time, 103
  Customize, 165, 250
  Customize, Toolbars, 53, 552
  Level resources, 403
  Organizer, 110, 503
  Spelling, 349
  Tracking, 475
  Tracking, Clear baseline, 442
  Tracking, Set baseline, 437
  Tracking, Update project, 473
top-down estimating, 305
Total cost column. See Cost field
tracking
  benefits, 453
costs, 307, 466, 469-471
defined, 451
duration-based, 479
  Actual duration/Remaining duration, 481-482
done or not done, 479-480
  estimates, 271
  Percent complete, 480-481
  schedules, 467
effort-based, 482
  actual work day-by-day, 484-485
  actual work per period, 483-484
  schedules, 454, 467
  elements, 452
  estimates, 278
House Painting example, 513-514
methodology, 568
Physical % complete field, 461
progress
  Actual work field, 464-466
  Actual duration field, 462-463
  Actual finish date field, 461
  Actual start date field, 461
  Actual work field, 463-466
custom views, 479
  earned value, 504-510
  fields, 458
  Percent complete field, 459-460
  Percent Work complete field, 460
selecting fields, 466-467
status date bar, setting, 474-475
status dates, 472-474
Task Update Tool, 475-476
Tracking table with Tracking Gantt view, 476-477
Update Project dialog box, 477-478
Project Guide views, 547
schedules, 5
whitepaper example, 454-457
   final schedule, 457
   Week 1 status, 454
   Week 2 status, 455
   Week 3 status, 456
work effort, 463-466
   daily hours, 465-466
   period hours, 464
Tracking command (Tools menu), 475
Tracking Gantt command (View menu), 442
Tracking Gantt view
   baselines, 436, 442
   overview, 74-75
   Status date field, 472
   Tracking table, 476-477
Tracking table, 76, 476-477
Tracking, Clear Baseline command (Tools menu), 442
Tracking, Set baseline command (Tools menu), 437
Tracking, Update project command (Tools menu), 473
troubleshooting
   blank rows, 59
   task links, 379
Type field, 247
types
   resources, 247
   task, 172
      Advanced tab, 173
      Fixed, 275
Fixed duration, 173, 176-178
Fixed units, 173-175
Fixed work, 173
Gantt Chart, 173
reviewing, 352
setting, 186-187
Task Form view, 174
VNLE project cast study, 191
U
Undo feature, 372
units
   assignment
      customizing, 254
      decimal, 254
      percentage, 254
   resources, 256-258
   estimates, 273, 277
Fixed, 173-175
Maximum units, 256
resources, 48
   assignment, 256-258
   effects on scheduling, 254-255
   maximum, 256
Units field, 36
Unlink Tasks button, 62
Update Project dialog box
   progress, tracking, 477-478
   schedules, progressing, 473
updating templates, 126-128, 529
V
VAC (Variance at completion) field, 506
values
   Actual, 40
   Baseline, 41
   Current, 40-41
   Remaining, 41
view bar, 55-56
Index

View Bar command (View menu), 55
View Definition dialog box, 501
View menu commands
  More views, 75, 501
  PERT analysis, 381
  Resource Sheet view, 239
  Show change highlighting, 373
Table: Work, 442
Table, More tables, 374, 500
Toolbars, 54
Toolbars, Analysis, 365
Toolbars, Project Guide, 545
Tracking Gantt, 442
View Bar, 55
View tab (Options dialog box), 559-560
viewing
  assignments, 62
  baselines, 434, 442
    assignments, 444
    multiple, 444
    split window, 443
  Tracking Gantt view, 436, 442
    Work table, 442
  budgets, 333
  calendars, 546
  constraints, 151
  costs, 314-315
  currencies, 304
  fields, 243
  nonworking time, 102, 542
  overallocation, 396, 400
    Resource Graph, 397
    Resource Usage view, 396
    split window view, 399
    Task Usage view, 398
  progress, 548
  Project Guide, 50, 545
  Project summary task, 116
resources, 238, 242
  adding columns to Resource Sheet, 243
  information, 62
  Resource Information dialog box, 242
  tables, 243-244
  split window, 82
  status dates, 472-474
  tables, 76
  tasks
    information, 62, 138-140
    outlines, 119-121
  timescale, 543
views
  Calendar, 368
  closing, 525
  columns
    adding, 26
    moving, 556
  costs, 302
  customizing, 479, 501-502
  Gantt Chart, 25, 49
    bar styles, 357
    bars, formatting, 536-541
    baseline fields, 433-434
    budgets, viewing, 333
    cost fields, viewing, 305
    critical paths, formatting, 282-283
    customizing, 555
    deadline markers, 149
    double-clicking/right-clicking, 554
    fields, customizing, 28
    fields, exposing, 26-28
    gridlines, 542
    layout, 542
    nonworking time, 542
    overview, 70-71
  Predecessors/Successors columns, 217-218
Resource Name field, 262
status bar, adding, 474
Task type and Effort driven fields, 173
timescale, 543
Leveling Gantt, 412
More Views, 75
printing, 370
Resource Allocation, 369
resource information, 31-32
Resource Sheet, 31
accrual methods, 326
adding resources, 238-239
budget resources, 323
Can level column, 413
columns, adding, 243
costs, entering, 310-311
double-clicking/right-clicking, 554
General tab, 246-247
overtime costs, 325
overview, 71-72
viewing resources, 238
Resource Usage, 32, 80
overallocation, 391, 396
overview, 73-74
schedules, reviewing, 369
resources, viewing, 243-244
schedules, reviewing, 363, 368-369
Split Window, 60, 82
baselines, 443
deleting, 83
opening, 82
overallocation, viewing, 399
resources, assigning, 261
tasks, linking, 199-201
Task Form, 174
task information, 30
Task Usage, 83
accrual methods, 326
budget resources, 325
costs, entering, 311
overallocation, viewing, 398
overview, 72
tasks, 80
Tracking Gantt
baselines, 436, 442
overview, 74-75
Status date field, 472
Tracking table, 476-477
Visual Reports, 366-368, 490-492, 509-510
Visual Reports command (Report
menu), 366, 509
Visual Reports – Create Report dialog
box, 367, 509
VNLE project case study
baselines, 449
budget resources, 345
closing, 532-533
deadlines, 191
estimates, adding, 293-294
linking tasks, 230-232
milestones, 190
predecessors, 233
reporting, 518
resources
adding, 292-293
assignments, 295
rates, 344-345
reviewing, 387
schedule, reviewing, 426-428
sequencing tasks, 228-230
successors, 230
task types, 191
tracking, 516-518
WBS, 190
W

WBS (work breakdown structure), 3
  creating, 3, 91-94
  outlines
    characteristics, 116-121
    expanding/collapsing, 119
  Project summary task, adding, 114-116
  reviewing, 94
  setting up, 130-131
  task notes, 121-122
  templates, 93, 123-124
    finding, 124-126
    saving, 126-128
    updating, 126-128
  visual diagramming method, 93
  VNLE project case study, 190

web sites
  Microsoft Project, 570
  Microsoft Project newsgroups, 570
  WBS outlines, 124

weeks (Timephased field), 39

Window menu commands
  Remove Split, 60
  Split, 60, 443

wizards
  Gantt Chart, 282
    bars, formatting, 538-541
    critical paths, reviewing, 417
    options, 539
    tasks, linking, 541
    text, customizing, 540
  printing, 510

work. See also effort
  actual
    baselines, 436
    tracking, 483-485
  budget work resources, 278-279
  calculating, 169
  closing remaining, 523
  contouring, 392
  effort, tracking, 463-467
    daily hours, 465-466
    formula, 466
    period hours, 464
  effort-based estimates
    adding, 271-277
    Duration and Units estimates, 277
    Effort and Units estimates, 273
    Fixed work Task type, 275
    Roofing project example, 273
    tracking, 278
    Work and Duration
      estimates, 274-275
    Work and Units estimates, 273
    Work formula variables, 272
  effort-driven tasks, 178-180
    Fixed, 173
    formula
      Fixed duration, 176-178
      Fixed units, 174
    Remaining, 436
  resources, 240, 247
  sequencing
    network diagrams, 208-210
    predecessor/successor tasks, 201
  tasks, 169-172
  time, estimating, 4
  WBS
    creating, 91-94
    reviewing, 94
    templates, 93
    visual diagramming method, 93

work breakdown structure. See WBS
  Work contour field, 38
  Work field, 35
    Duration field relationship
      with, 175-177
    reviewing, 353
Index

tasks, 169-172
  resources, adding, 169
  values, entering, 170
  values, 40-41
Work resources field, 468
Work table, 442
Workgroup field, 248
working time (calendars), 107-108
workloads, reviewing, 354

Z
  zero project summary task line, 114-116
  Zoom In button, 63-64
  Zoom Out button, 63-64