Teresa S. Stover
Microsoft Certified Technical Specialist—Microsoft Project

with Bonnie Biafore, PMP
and Andreea Marinescu, PMP

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Teresa S. Stover
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When the county closed its libraries, you all contributed your resources, entrepreneurial spirit, and ingenuity to open them again.

You are my heroes!

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Introduction

Welcome to Microsoft Project 2010 Inside Out. This book is your comprehensive Project 2010 reference, in which you can learn not only the essentials, but also the intermediate topics and advanced techniques for using Project 2010 like a power user.

Who This Book Is For

This book is designed for intermediate to advanced computer users who manage projects. Depending on where you are on the spectrum of project management experience, this book can help you in the following ways:

- If you are completely new to project management and Project 2010, this book will give you a solid grounding in the use of Project 2010 as well as basic project management practices and methodologies. It will help you understand the phases of project management, including the controlling factors in the project life cycle.
- If you're an experienced project manager, this book integrates common project management practices with the use of the software tool. This helps you see how you can use Project 2010 to carry out the project management functions you're accustomed to.
- If you're already an experienced Microsoft Project user, this book will help you better understand the inner workings of Project 2010 so that you can use it more effectively to do what you need it to do. In many ways, Project 2010 is like an entirely new project management information system. It departs in several ways from how things were done in previous versions, and it provides many more choices to consider that have an impact on your project throughout its phases. This book also extensively covers the striking new features in Project 2010 and provides the necessary guidance and "gotchas" regarding whether, when, and how to use those features.

Assumptions About You

Even if you have never used Microsoft Project 2010 or managed a project before, this book assumes you have experience with Microsoft Windows and at least a couple of programs in Microsoft Office—for example, Microsoft Word, Microsoft Excel, or Microsoft Visio.

How To Use This Book

Regardless of your previous experience, this book serves as a facilitator in helping you work with Project 2010 for your project's processes and phases. Read the chapters and parts you feel are appropriate for your needs right now. Familiarize yourself with the topics available in the other chapters.

Then, as you continue to manage your projects with Project 2010, keep the book within arm's reach so that you can quickly find the answers to questions and problems as they come up.

As you achieve mastery in one level of knowledge, use this book to help you attain the next level, whether it's working with multiple projects at one time, customizing Project 2010, or programming Project 2010 functions to automate repetitive activities. This book is your comprehensive Project 2010 reference, in which you can quickly find answers and then get back to work on your project plan, and more importantly, doing the vital work of managing your projects.

How This Book Is Organized

The book is organized into the following parts:

- **Part 1: Project Fundamentals (Chapters 1–2)** If you want a primer on project management in general or Project 2010 in particular, read the chapters in this part. Here, you find an overview of Microsoft Project, including what's new in Project 2010. There's an overview of project management processes and how Project 2010 facilitates those processes. You also find a discussion of the various kinds of people involved in your project, as well as some keys to successful project management.
- **Part 2: Developing the Project Plan (Chapters 3–10)** Everything you need to know about starting a new project and creating a new project plan is found here. You get details about working with the Project 2010 workspace, scheduling tasks, setting up resources and assigning them to tasks, establishing costs, and adjusting the project plan to be an accurate model of your project's reality.
- **Part 3: Tracking Progress (Chapters 11–12)** After you create the perfect project plan, you're ready to execute it. To keep the project plan working for you, it needs to be up to date. This part provides details about setting and working with baselines so that you can track and compare your progress toward deadlines. It covers important aspects of updating and tracking costs as well as adjusting the schedule, resource workload, and costs to reflect ongoing changes in your project.

- **Part 4: Reporting and Analyzing Project Information (Chapters 13–14)** Project 2010 provides a wide range of options for setting up and printing views and reports. This part outlines these methods—from simply printing your current view to generating a built-in report to designing and running your own custom report. This part also describes how you can export data to Microsoft Excel or Microsoft Visio to generate visual reports for analysis, as well as how you can use earned value data to analyze progress and costs.
- **Part 5: Managing Multiple Projects (Chapters 15–16)** As a project manager, it's likely that you're managing more than one project at a time, working with a collection of smaller projects that feed into a large project, and working with various groups of resources who contribute to different projects. This part explains the concepts and practices of master projects, subprojects, and resource pools. It also explains how you can exchange information between different project plans; copy or link information; and leverage customized views, reports, groups, and other Project 2010 elements you might have created.
- **Part 6: Integrating Project 2010 with Other Programs (Chapters 17–21)** Project 2010 is designed to work seamlessly with other programs. You can copy, embed, link, hyperlink, import, and export information. This part describes these methods in detail and also devotes chapters to the specific integration techniques for working with Microsoft Excel, Microsoft Visio, Microsoft Outlook, and Microsoft SharePoint.
- **Part 7: Managing Projects Across Your Enterprise (Chapters 22–27)** Project 2010 helps to facilitate collaboration in project teams across your enterprise. If you're using Microsoft Project Professional 2010, Microsoft Project Server 2010, and Microsoft Project Web App, you and your organization have access to robust features for enterprise project management, portfolio management, and team collaboration. In this part, you learn how to set up and use the enterprise features to standardize and customize Project 2010 and project management processes throughout your organization. Project managers and resource managers can assign tasks, obtain task progress updates, and receive status reports from team members. A chapter each is devoted to the duties and capabilities of different stakeholders in the enterprise project management structure: the project server administrator, the project manager, the team member or team lead, the executive or other managing stakeholder, and the portfolio manager.
- **Part 8: Customizing and Managing Project Files (Chapters 28–32)** With Project 2010, you can create and customize your own views, tables, groups, reports, formulas, macros, and more. You can also customize the Office ribbon. This part covers the details of these custom elements. This part also discusses methods for closing a project at the end of its life cycle and continuing to use what you learn by creating templates that can become the basis for the next project of its kind. Along these lines, this part details project file-management issues, including file locations, backups, and multiple versions.

- **Part 9: Appendixes** This part includes ancillary information you'll find useful in your work with Project 2010. For example, there are installation guidelines and a list of online resources to expand your knowledge of Project 2010 and project management. Also included is a handy keyboard shortcut reference.

Throughout the book, you'll find tips that provide shortcuts or alternative methods for doing certain tasks. The Inside Out tips give you information about known issues or idiosyncrasies with Project 2010 and possible methods of working around them.

There are also Troubleshooting tips that alert you to common problems and how to avoid or recover from them.

This book is designed so that you can quickly find the answers you need at the time you have the question. The comprehensive table of contents is a good starting point. Another excellent place to start finding your solution is in one of the two indexes at the end of the book. Use the special Troubleshooting index to solve specific problems. Use the master index to help you find the topics you're looking for when you need them.

Features and Conventions Used in this Book

This book uses special text and design conventions to help you find the information you need more easily.

Text Conventions

Convention	Meaning
Commands for navigating the ribbon	When referring to commands on the ribbon, this book points to the tab, group, and button. For example, "On the Task tab, in the Insert group, click the Task button."
Abbreviated commands for navigating the ribbon	In some cases, you'll see abbreviated commands. For example, "Click Task, Insert, Task" means click the Task tab on the ribbon, then in the Insert group, click the Task button.
Boldface type	Boldface indicates text that you type.
Initial Capital Letters	The first letters of the names of tabs, dialog boxes, dialog box elements, and commands are capitalized. Example: the Save As dialog box.
Italicized type	Italicized type indicates new terms.
Plus sign (+) in text	Keyboard shortcuts are indicated by a plus sign (+) separating key names. For example, Ctrl+Alt+Delete means that you press the Ctrl, Alt, and Delete keys at the same time.

Design Conventions

INSIDE OUT **This statement illustrates an example of an "Inside Out" heading**

These are the book's signature tips. In these tips, you get the straight scoop on what's going on with the software—inside information about why a feature works the way it does. You'll also find handy workarounds to deal with software problems.

Sidebar

Sidebars provide helpful hints, timesaving tricks, or alternative procedures related to the task being discussed.

TROUBLESHOOTING

This statement illustrates an example of a "Troubleshooting" problem statement.

Look for these sidebars to find solutions to common problems you might encounter. Troubleshooting sidebars appear next to related information in the chapters. You can also use "Index to Troubleshooting Topics" at the back of the book to look up problems by topic.

Cross-references point you to locations in the book that offer additional information about the topic being discussed.

CAUTION!

Cautions identify potential problems that you should look out for when you're completing a task or that you must address before you can complete a task.

Note

Notes offer additional information related to the task being discussed.

About the Companion Content

The companion content for this book includes sample files that you can use as the basis for practicing Project 2010 techniques throughout this book. Additionally, the companion content for this book includes a list of online resources regarding Microsoft Project 2010 and project management. The following table lists the sample files and online resources.

To access and download the companion content, visit:

http://wwww.microsoftpressstore.com/title/parentISBN13.

Chapter or Topic	Content
Chapter 1	01WebDev.mpp
Chapter 3	03WebDev.mpp 03aWebDev.mpp 03RecurringTask.mpp 03Training-WBS.mpp
Chapter 4	04WebDev.mpp 04aWebDev.mpp
Chapter 5	05WebDev.mpp 05aWebDev.mpp
Chapter 6	06WebDev.mpp
Chapter 7	07Resources.mpp
Chapter 8	08Home.mpp 08aHome.mpp 08WebDev.mpp 08aWebDev.mpp 08bWebDev.mpp
Chapter 9	09Costs.mpp 09WebDev.mpp
Chapter 10	10Home.mpp 10WebDev.mpp
Chapter 11	11WebDev.mpp
Chapter 12	12NewBiz.mpp 12ProgressLines.mpp
Chapter 13	13NewBiz.mpp

Chapter or Topic	Content
Chapter 15	15Prototype.mpp 15VendorRFP.mpp 15Consolidated.mpp 15Consolidated2.mpp 15ResourcePool.mpp 15ResourcePool1.mpp
Chapter 16	16NewBiz.mpp 16OfficeMove.mpp
Chapter 17	17AnnualRpt.mpp 17AnnualPlan.pptx 17AnnualRpt.docx 17CopyTimeline.docx 17LogoS.bmp
Chapter 20	20OutlookTasks.mpp 20OutlookTasks_Routing.mpp 20TasksToExchange.mpp
Chapter 21	21ContosoWeb.mpp 21ContosoWeb2.mpp 21WebDev.mpp
Chapter 28	28OfficeMove.mpp
Chapter 31	31WebDev.mpp 31DirectMailCampaign.mpp
Chapter 32	32DirectMailCampaign.mpp 32DirectMailCampaign1.mpp 32ComparisonReport.mpp
Online Resources	Microsoft-Sponsored Resources for Project 2010 Project Desktop Basics Project Server Basics Discussion Forums and Social Media Developer Information Project Certification Independent Resources for Project 2010 Organizations Experts and Resources Blogs and Discussions

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Finally, thanks to you, reader and project manager. Your projects can and do change the world. Remember, there's no end to the incredible things you can do with a well-planned and well-run project.

Support and Feedback

The following sections provide information on errata, book support, feedback, and contact information.

Errata & Support

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PART 1

Project Fundamentals

CHAPTER 1

Introducing Microsoft Project 2010 3

CHAPTER 2

Understanding Projects and Project Management 45

Before you can use the sample files for Chapter 1, you'll need to install them from this book's companion content website. For more information about downloading and installing the sample files, see "About the Companion Content" on page xxviii.

CHAPTER 1

Introducing Microsoft Project 2010

Using Project 2010—An Overview 5
What's New in Microsoft Project 2010 9
Using the Project Ribbon 30
Learning as You Go 34

Let's say you are a supremely multitasking product specialist for an up-and-coming startup company. You handle research, development, material procurement, and marketing for your suite of products. On top of all this, you now have the responsibility of managing the project for the launch of your company's newest product.

On the other hand, we could say that you are an accomplished project management professional who manages projects for several departments in your organization at any given time. You're responsible for managing thousands of tasks, hitting hundreds of deadlines, and assigning scores of resources. You need to plan and monitor each project, work with different managers, and make the best use of resources—some of whom might work on only one project and others who might be shared among several of your projects.

As these two scenarios illustrate, project management is a process and a discipline that can be the full focus of your career or one of many aspects of your job description.

Numerous industries rely on sound project management for their success. Here are just a handful:

- Construction
- Filmmaking
- Computer system deployment
- Logistics
- Engineering
- Publishing
- Events planning
- Software development

Across different industries, there are common project types, for example:

- New business startup
- New product development
- New service rollout
- Computer system deployment
- Training development and delivery
- Website development
- Conference and trade show exhibition
- Office move
- Marketing campaign

Regardless of the size of your organization, the scope of your projects, or even the number of projects you find yourself managing simultaneously, effective project management is vital at the start of a project. This is when you determine what needs to be done, when, by whom, and for how much money. Effective project management is also essential after you kick off the project, when you are continually controlling and managing project details. You frequently analyze the project—tracking the schedule, the budget, resource requirements, and the scope of tasks. In addition, you manage the level of quality in the project, plan for risks and contingencies, and communicate with the members of the project team as well as with upper management or customers.

Throughout this intricate process of planning and tracking your project, Microsoft Project 2010 is a smart and trustworthy assistant that can help you manage the many responsibilities associated with your project. Many software applications can help you work toward producing a specific result that you can print, publish, or post. And it's true that you use Project 2010 to set up a project schedule and print reports that reflect that schedule. However, Project 2010 goes far beyond just the printed outcome. This is a tool that helps you brainstorm, organize, and assign your tasks as you create your schedule in the planning phase. Project 2010 then helps you track progress and manage the schedule, resources, and budget during the execution phase. All this so you can reach your real objective—to successfully achieve the goals of your project on schedule and under budget.

Using Project 2010—An Overview

Project 2010 is a specialized database that stores and presents thousands of pieces of data related to your project. Examples of such data include tasks, durations, links, resource names, calendars, assignments, costs, deadlines, and milestones.

These pieces of information interrelate and affect each other in a multitude of ways. Underlying this project database is the scheduling engine, which crunches the raw project data you enter and presents the calculated results to you, as shown in Figure 1-1. Examples of such calculated results include the start and finish dates of a task, resource availability, the finish date of the entire project, and the total cost for a resource or for the project.

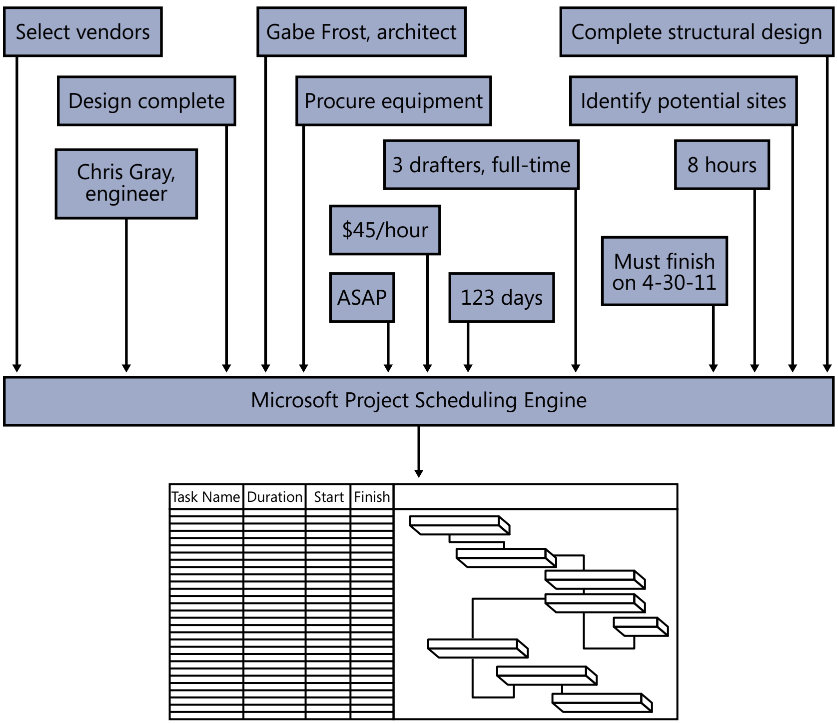


Figure 1-1 Use Project 2010 as your database of project management information.

You can then manipulate and display this calculated data in various views to analyze the planning and progress of your project. This information helps you make decisions vital to the project's success.

You can also communicate your progress and provide the feedback necessary to keep your team and other stakeholders informed of essential project information. You can create and print reports for status meetings or distribution to stakeholders, and you can print or publish certain views or reports to your team's website.

Different Project 2010 editions and companion products are available for you and your organization to get the project management features you need.

Project Standard 2010

Microsoft Project Standard 2010 is the basic desktop edition. Project Standard 2010 has all the essential features for individual project management, including the following:

- Task scheduling
- Resource management
- Tracking
- Reporting
- Customization

With this substantial tool set, you can start planning, managing, and reporting your project information "straight out of the box"—that is, immediately upon installation. (See Figure 1-2.)

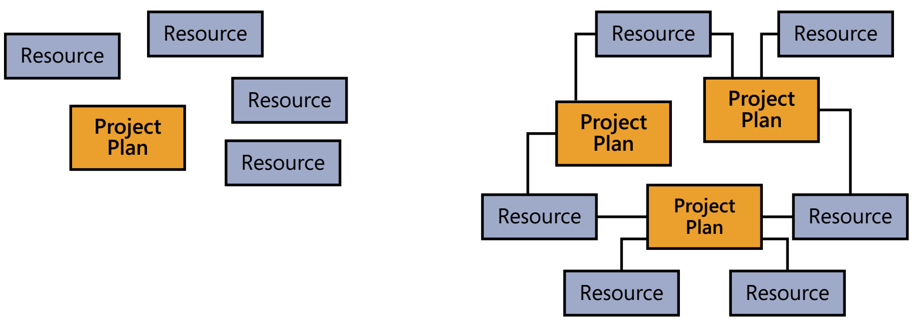


Figure 1-2 Develop and execute single or multiple project plans with Project Standard 2010.

Project Professional 2010

Project Professional 2010 provides everything that Project Standard 2010 does, with some notable additions. Project Professional includes the Team Planner view, the ability to show deactivated tasks for what-if scenarios, and workgroup collaboration features through Microsoft SharePoint Foundation 2010.

In addition, if you're working with Project Server 2010 and Project Web App, Project Professional serves as the client for a complete enterprise project management solution. This solution includes enterprise capabilities for project standardization, resource management, team collaboration, communication, executive analysis, and portfolio management. With Project Professional, project management is fully scalable across multiple departments and divisions in an organization, as shown in Figure 1-3.

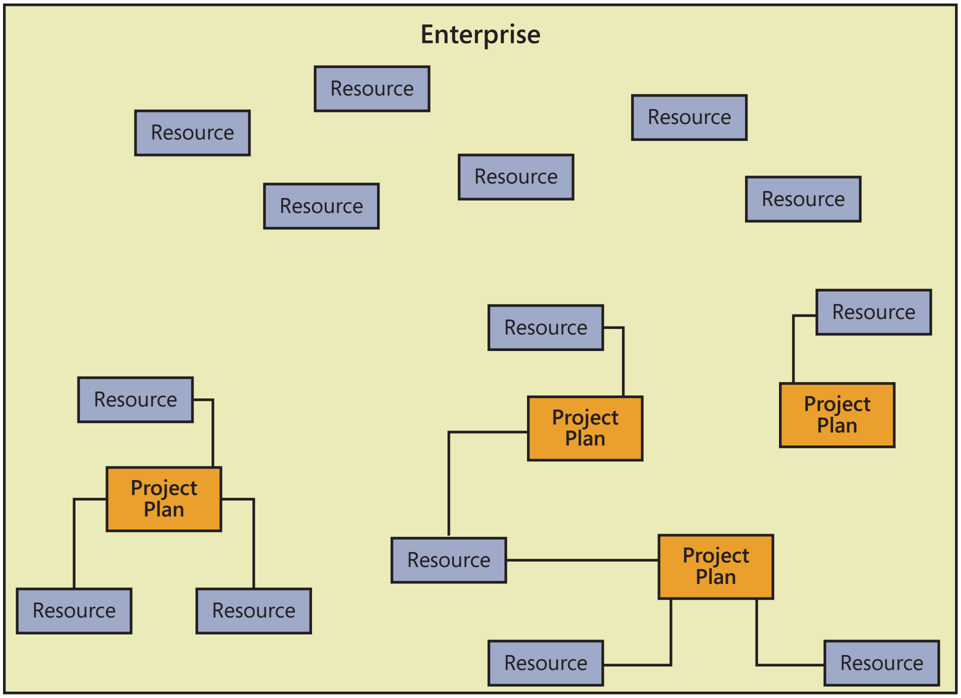


Figure 1-3 Develop and execute project plans across an enterprise with Project Professional.

Project Professional, as connected to Project Server, includes the following features:

- Team collaboration through Project Web App, which is built on Microsoft SharePoint Server 2010. From Project Professional, the project manager can submit assignments to the organization's project server, and resources can view and update their assignments by using Project Web App, the web-based project management interface.
- Global templates, enterprise fields, and other elements that enable your project administrator to standardize and customize the use of Project 2010 for the way your enterprise manages projects.
- The ability to choose and manage resources from the pool of a specific group or the entire company. You can see resource availability across multiple projects and have Project 2010 automatically find resources that will appropriately fill project team requirements.

Project managers use Project 2010 to enter, store, and update project information. They can then send project information such as assignments or task updates to specific resources or grouped team resources through Project Server.

For more information about the enterprise project management features provided through Project Professional, see Chapter 22, "Understanding Enterprise Project Management."

Project Server 2010

Microsoft Project Server 2010 is a separately licensed companion server product that works with Project Professional to provide an enterprise project management solution that includes team collaboration among project managers, resources, and other stakeholders.

Project Server also integrates robust project portfolio management features. These tools provide for proposed project evaluation and selection, workflow capabilities, and business intelligence and analysis across the portfolio projects.

For more information about setting up Project Server and Project Web App, see Chapter 23, "Administering Your Enterprise Project Management Solution."

For project manager information on enterprise and collaboration features, see Chapter 24, "Managing Enterprise Projects and Resources."

For portfolio management information, see Chapter 27, "Managing and Analyzing Project Portfolios."

Project Web App

Microsoft Project Web App is a web-based client application to Project Server. Project Web App provides the user interface for enterprise project management and team collaboration functions for project managers, resources, executives, portfolio managers, and other stakeholders.

Resources and other associated stakeholders in the project can view and work with the information held in Project Server. Resources can review their assigned tasks and other project information in Project Web App. In addition, they can add tasks, update progress information, and submit status reports through Project Server. Upon approval, this information ultimately updates the project plan being maintained by the project manager.

Executives can view high-level project overviews as well as detail information. They can examine projects within a particular program, analyze several projects within a portfolio for resource usage or cost, and make strategic decisions about proposed projects. All information is gathered, organized, and reported consistently throughout the organization, providing a complete and accurate picture of all projects.

For more information about functions for resources and resource managers, see Chapter 25, "Participating on a Team Using Project Web App." Upper managers and other stakeholders should see Chapter 26, "Making Executive Decisions Using Project Web App." Portfolio managers can refer to Chapter 27.

What's New in Project 2010

Project 2010 represents a dramatic step forward in the product's evolution. This is evident from the introduction of user-controlled scheduling and workgroup collaboration features in the desktop version of the product, all the way to the fully realized project portfolio management system in the enterprise version. The way projects are scheduled has made a sizable shift, and in some cases this new approach is much more than just a departure, because it contradicts the way project managers have used previous versions of Microsoft Project. Many new features provide more flexibility and user control, but with that flexibility is needed knowledge of consequences in various aspects throughout the project life cycle.

This section is the first step, providing an overview of the new features throughout Project 2010. As you gain more experience with the features and processes described in this and succeeding chapters, we hope that you'll learn how best to approach the product's new paradigm and tap into the power of the "new Microsoft Project" and use it to your advantage as you manage your projects effectively.

As in previous versions of Microsoft Project, there are two editions of Project 2010: Project Standard and Project Professional. Both versions can be used as a standalone desktop project management application for a single project manager, although Project Professional has a few more features available than Project Standard. Furthermore, with the implementation of Project Server for enterprise project management, a host of additional features becomes available in Project Professional.

Throughout the different configurations of Project 2010, you'll see new features and significant improvements in the following areas:

- Controlling the project schedule
- Analyzing and troubleshooting the schedule
- Collaborating on project details
- Viewing project information
- Working with commands and tools

In Project 2010 enterprise project management, you'll see additional changes in the following areas:

- Managing portfolios, including demand management and workflow
- Planning projects and resource capacity

- Tracking project status and timesheets
- Viewing project information, including the use of new business intelligence tools
- Working with commands and tools
- Managing the project server

This section summarizes the new features in Project Standard, Project Professional, Project Server, and Project Web App. Cross-references indicate where these features are explained in detail elsewhere in this book.

What's New in Project Standard 2010

A major highlight of the new version of Project Standard is the introduction of manually scheduled tasks, which provide more freedom and flexibility when creating a project. New ways to share information, including the use of SharePoint and PDF, provide for better collaboration among team members. You can highlight and focus on the most important tasks and phases using the new Timeline. Making commands easier to find and use, the Office ribbon is now part of Project 2010. The many Microsoft Project menus and toolbars are now a thing of the past.

Controlling the Project Schedule

You now have more choices when it comes to how tasks are created and scheduled:

- **Manually scheduled tasks** You can select whether the tasks in a project are scheduled manually or automatically, as shown in Figure 1-4. With manually scheduled tasks, you can enter durations, start dates, and finish dates without having those entries recalculate other aspects of the schedule. You can enter notes in the duration and date fields. You can even leave those fields blank, as placeholders, until you have more information. You can still designate other tasks in the same project as automatically scheduled tasks, and you can convert manually scheduled tasks to automatically scheduled tasks. This gives you greater flexibility and lets you control the schedule, which can be particularly beneficial in the beginning stages of a project and for phases that are further out and have many unknowns.

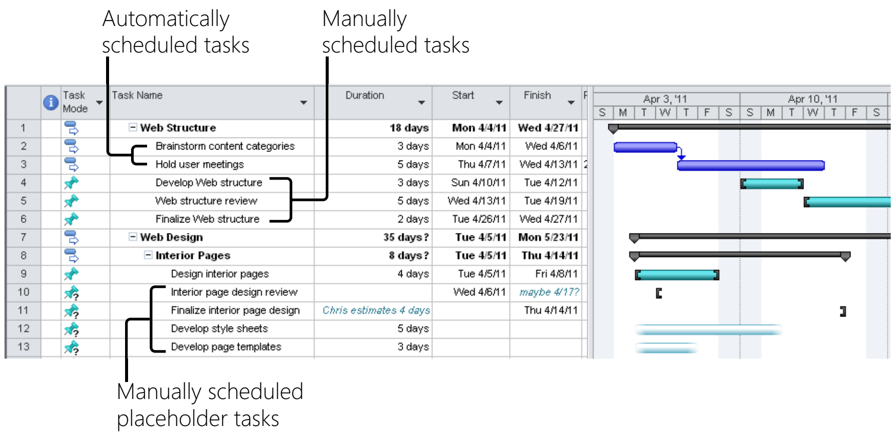


Figure 1-4 Tasks can be automatically or manually scheduled, depending on the needs of the project and the information currently available.

For more information, see "Manually Scheduling Tasks" on page 184.

- **Top-down summary tasks** In past versions of Microsoft Project, you could create a summary task only by making subtasks out of tasks beneath it. You can still do this in Project 2010, but you can also now create a summary task out of the gate. You can insert a summary task above an existing task, or you can create a summary task at the end of the task list. In the latter case, a new subtask is automatically added beneath the new summary task, as shown in Figure 1-5.

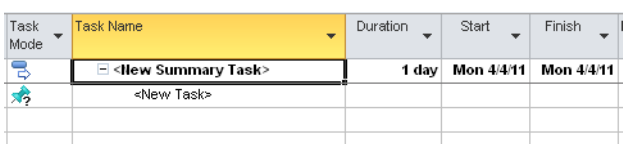


Figure 1-5 Create top-down summary tasks and then add subtasks under them.

For more information, see "Organizing Tasks into an Outline" on page 115.

Analyzing and Troubleshooting the Schedule

In Project 2010, tools are at your disposal to help you see why a task is scheduled the way it is and to alert you to possible scheduling conflicts down the road.

- **Task Inspector** This tool lists all the scheduling factors that drive how a task is scheduled, as shown in Figure 1-6. Such factors might include whether the task is manually or automatically scheduled, its duration, any dependency links, date constraints, resource calendars, overallocated resources, and so on. In some cases, the Task Inspector provides solutions to current or potential scheduling problems.

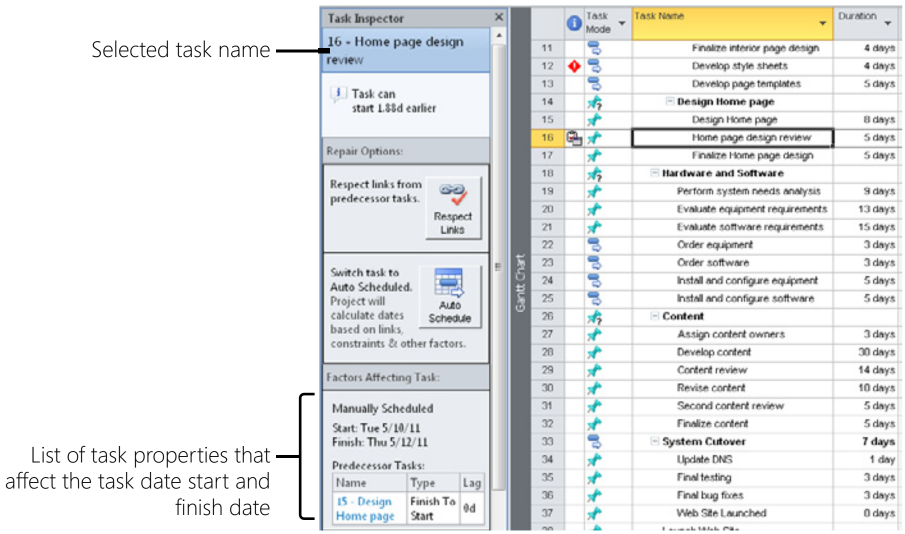


Figure 1-6 The Task Inspector lists all schedule "drivers" for a selected task.

For more information, see "Reviewing the Factors That Affect a Task Start Date" on page 240.

- **Schedule warnings and indicators** If Project 2010 detects a condition in the schedule that is causing a current or potential schedule conflict, a visual cue appears in the task information at the point of the problem. You can click that visual cue to get more information, and then use the Task Inspector to see more details and resolve the problem.

- **Compare project versions** In previous versions of Microsoft Project, the Compare Projects feature was an add-in. Now it's built in to Project 2010, and provides a comprehensive view that shows differences between two projects, line by line, as shown in Figure 1-7. This can be useful in a variety of situations—for example, when building a new project and taking input from several sources, or when you've based a new project on an existing project and you want to compare detailed information between the two.

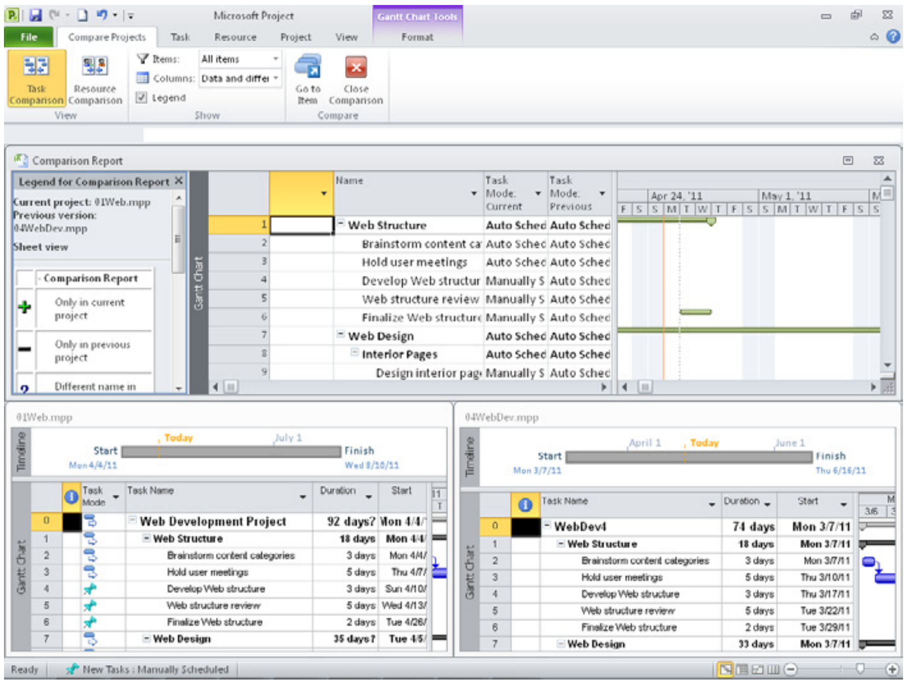


Figure 1-7 The Compare Projects report shows differences between two project files.

For more information, see "Comparing Project Plans Side by Side" on page 1223.

Collaborating on Project Details

Project collaboration among team members and other stakeholders is always an essential component to effective project management. Project 2010 adds new functionality with its integration with SharePoint. Project 2010 also lets you copy and paste information between applications and provides additional file formats to add to its set of robust collaboration features.

- **Save to SharePoint** You can facilitate more collaboration by saving (although not synchronizing) a project file to a site created with SharePoint Foundation or SharePoint Server.

For more information, see "Save a project to SharePoint by using Project Standard 2010" on page 789.

- **Enhanced copy and paste to other applications** When you copy and paste information from Project 2010 into another Microsoft Office application such as Microsoft PowerPoint or Excel, outline levels, column headings, and formatting are maintained as they were in the project file, as shown in Figure 1-8. There's no longer any guesswork about where and how information is pasted, and no reformatting has to be done. You just paste, and the information looks as it did in your project file.

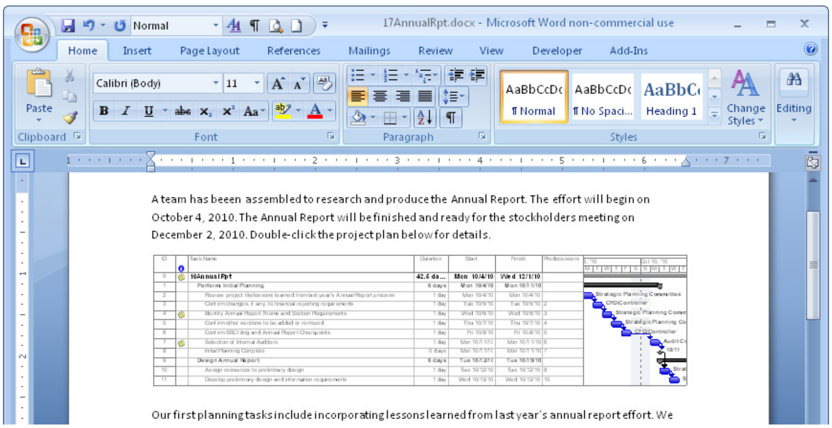


Figure 1-8 Paste information from Project 2010 into Word, and the outline levels, column headings, and formatting look just as they did in the project plan.

For more information, see "Copying from Project 2010 to Another Application" on page 647.

- **Save to PDF/XPS** You can save a project view or report as a PDF (Portable Document Format) or XPS (XML Paper Specification) file without needing to install any other program, as shown in Figure 1-9. With either of these formats, you can be sure that your file preserves its original formatting and is not editable. The files are also easy to open and read on any computer. This is especially important because you can't assume that everyone who needs to see your project information has access to Project 2010.

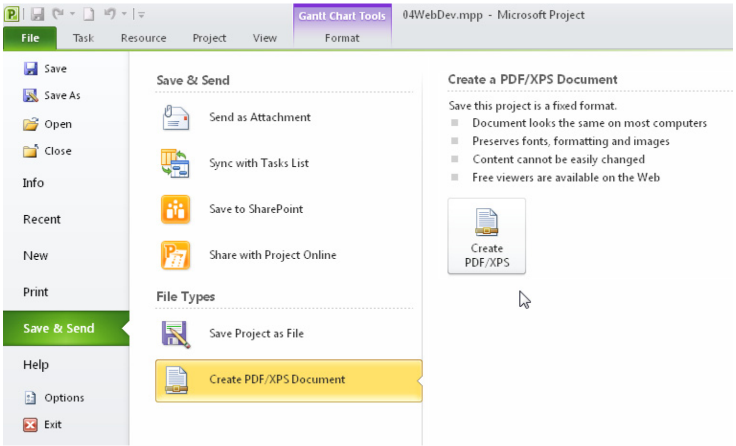


Figure 1-9 Save a view as a PDF or XPS file to ensure that it looks exactly as you intended when your recipients open the file on their computers.

For more information about PDF and XPS, see "Working with Common Cross-Application File Formats" on page 1221.

- **Backward compatibility** Project 2010 readily opens files created in previous versions of Microsoft Project. This means that a converter is not necessary to open files created in earlier versions.

- **Scalable 64-bit compatibility support** Project 2010 is offered as a 32-bit or 64-bit installation. The 64-bit compatibility provides improvements in performance, which is particularly helpful for project managers who regularly work with very large projects or complex structures of master projects and subprojects.

Viewing Project Information

The new Timeline lets you see key phases or tasks, keeping you focused on the big picture. If you're familiar with Excel, you'll like how text wraps and columns are added in any sheet view. There are new ways to zoom, draw, and color elements in your plan.

- **Timeline view** You can see the highlights of your entire schedule or review specific dates and deadlines with the new Timeline, available at the top of every view throughout the project plan, as shown in Figure 1-10. You can select which tasks, phases, or milestones to include in the Timeline, making it easy for you to control the content and present the most relevant information for your own everyday reference or for your audience. With its rich formatting and visual effects, the Timeline is a prime candidate for copying and pasting into other applications, like Outlook, PowerPoint, or Visio, for sharing key project information with stakeholders.

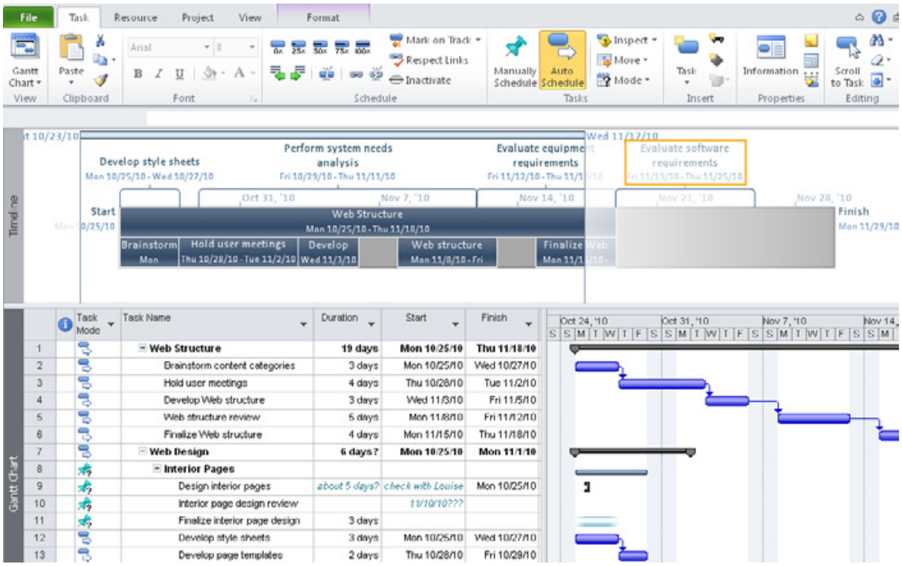
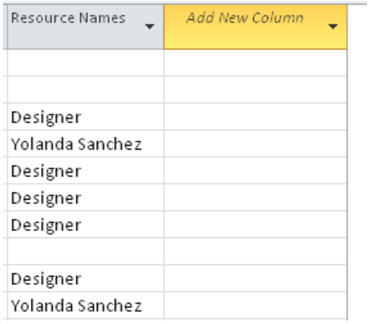


Figure 1-10 Use the Timeline to view the highlights or milestones you want to keep at the forefront.

For more information, see "Highlighting Tasks with the Timeline" on page 134.

- **Add new columns quickly** Every table throughout Project 2010 includes a blank column into which you can simply enter data without first defining the column's data type, as shown in Figure 1-11. This provides for a more intuitive way to add new columns, especially columns for custom project information.



Resource Names	Add New Column
Designer	
Yolanda Sanchez	
Designer	
Designer	
Designer	
Designer	
Yolanda Sanchez	

Figure 1-11 Use the Add New Column column to quickly customize a table.

For more information, see "Hiding and Showing Columns" on page 158.

- **Text wrap** Row heights now adjust automatically to display the full contents of a cell, as shown in Figure 1-12. This makes it easy to see all the information in a cell, especially Task Name or Resource Name cells, with minimal column adjustments.

Task Name	Duration
Define the Opportunity	**13 days**
Research the market and competition	3 days
Interview owners of similar businesses	5 days
Identify needed resources	2 days
Identify operating cost elements	2 days

Figure 1-12 Long task names can now easily be accommodated because of text wrapping.

- **Zoom slider** You can use the Zoom slider in the lower-right corner of the Project 2010 window to zoom the timescale of a time-based chart in or out, as shown in Figure 1-13. This makes working with the Gantt Chart or Resource Usage view so much more convenient.

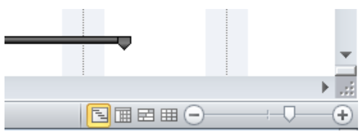


Figure 1-13 Use the Zoom slider to adjust the timescale to more or less detail.

- **Expanded color palette and formatting** More colors are now available for bar styles, font colors, and backgrounds. Gantt chart color schemes can help personalize your project, and the new drawing tools help you emphasize important schedule details.

For more information about the drawing tools, see "Marking Up a Schedule with Drawing Tools" on page 1080.

Working with Commands and Tools

Like the other Microsoft Office applications, Project 2010 now incorporates the ribbon, Quick Access Toolbar, Backstage view, and context-sensitive right-click menus and toolbars. These all make working with Project 2010 more familiar and intuitive, and allow power users to work even faster.

- **Ribbon interface** Part of what's known as the *Office Fluent user interface,* used throughout Microsoft Office, the ribbon is now integrated into Microsoft Project. Instead of arranging commands in drop-down menus and toolbars, the ribbon arranges commands logically in tabs and groups and presents them graphically, as shown in Figure 1-14. The ribbon can change dynamically depending on which view of the project plan you're showing.

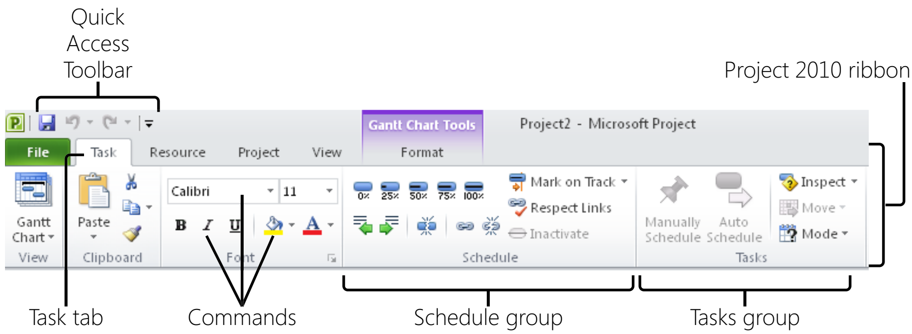


Figure 1-14 Use the ribbon to find and use Project 2010 commands and tools.

For more information about the ribbon, see "Using the Project Ribbon" on page 30.

- **Quick Access Toolbar** The Quick Access Toolbar is another aspect of the Fluent user interface. This toolbar is always present in the upper-left corner of the Project 2010 window, and it can be customized with your most frequently used commands.
- **Backstage view** Tools, templates, and program options are available in the new Backstage view. The Backstage view is where you save and print files, create new project plans or open existing ones, and set your program preferences and options. It's also where you go to get Help about Project 2010. Figure 1-15 shows the Print Backstage view.

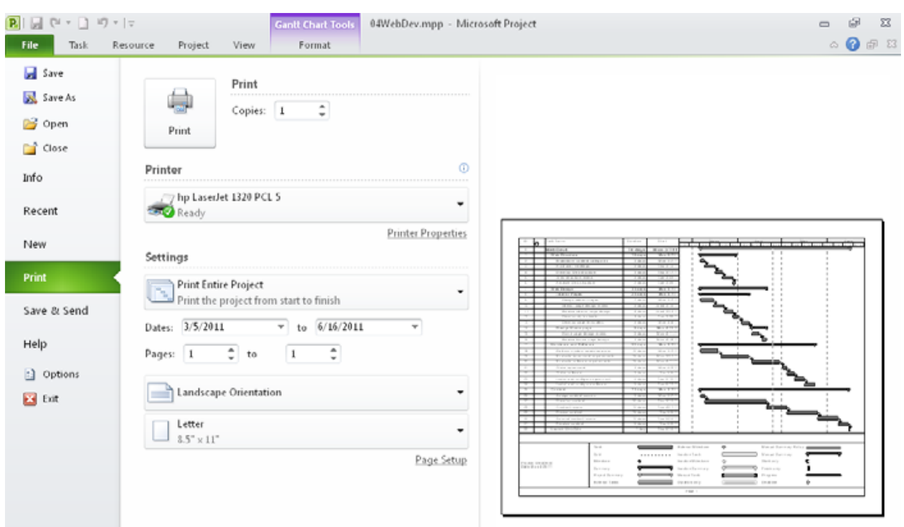


Figure 1-15 Several pages of the Backstage view help you set file preferences and manipulate your project files.

- **Context sensitive menus and mini-toolbars** You can quickly find the most commonly used commands in a particular context with a well-placed right-click on the Project 2010 window. In most places, a menu appears that shows commands that apply to the area or content where you clicked. In some places, a mini-toolbar also appears to provide even more context-sensitive options. (See Figure 1-16.)

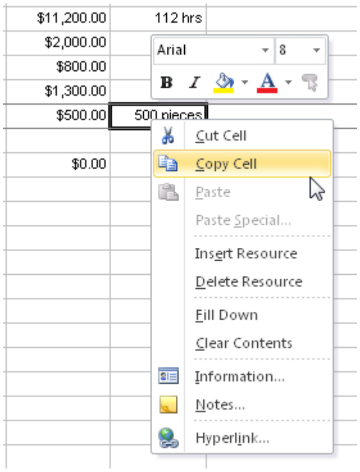


Figure 1-16 Right-click an area of the Project 2010 window to see a menu of context-sensitive commands, and sometimes a mini-toolbar.

What's New in Project Professional 2010

Project Professional 2010 includes all the new features of Project Standard 2010. In addition, Project Professional 2010 includes features for managing resource teams and deactivating tasks.

You can look at your schedule in different ways by using the Team Planner, by synchronizing project workgroup information in SharePoint, and by inactivating and reactivating tasks in Project Professional 2010.

- **Team Planner** Visually arrange the scheduling and assignment of tasks along a graphical timeline by using the new Team Planner view. You can assign tasks, reassign tasks, or reschedule tasks to when resources are available by dragging and dropping on a resource timeline grid, shown in Figure 1-17. Use the Team Planner view not only to rearrange tasks and assignments, but to understand how much resources are underworked or overworked or where tasks are bunching up.

INSIDE OUT Some features from previous versions are discontinued in Project 2010

The following is a list of Project 2007 features that are no longer available in Project 2010.

- **Project guides** Previous versions included a set of project guides to help set up tasks and resources, to track progress, or to generate reports. Although these are discontinued, you can use Microsoft Visual Basic for Applications (VBA) to enable any custom project guides you might have created.
- **Double-click to enable task splitting** Task splitting is still available; you just single-click to enable it instead.

  For more information, see “Splitting Tasks” on page 420.
- **Resource availability graphs from the Assign Resources dialog box behave differently** You can only see the graph of one resource at a time. However, using the combination view that appears, you can still page through multiple resources assigned to a single task, or see the resources assigned to a different task.

  For more information, see “Finding the Right Resources for the Job” on page 290.
- **Former add-ins are now built-in features** The Copy Picture, Adjust Dates, and Compare Project Versions commands are now built in to Project 2010, and add-ins are no longer needed for these functions.
- **Save as Excel PivotTable** You cannot save Project 2010 data as an Excel PivotTable file. However, you can still create Excel visual reports that use your project data in an Excel PivotTable format. You can export earned value information and see S-curves of this data in Excel. You can also now save Project 2010 data in other Excel formats, including .xlsx and .xlsb.

  For more information about visual reports, see “Generating the Right Reports” on page 541. For more information about saving project information in an Excel file format, see “Saving and Opening with Different File Formats” on page 1214.
- **Add-ins and sample macros** Add-ins and sample macros provided with Project 2007 are no longer available. These include the PERT Analysis, Format_Duration, ResMgmt_TaskEntry, Rollup_Formatting, Toggle_Read_Only, and Update_File functions.
- **Custom forms** The ability to create custom forms (typically used to create custom dialog boxes or data entry forms) is no longer available. However, you can still use VBA to create such forms.

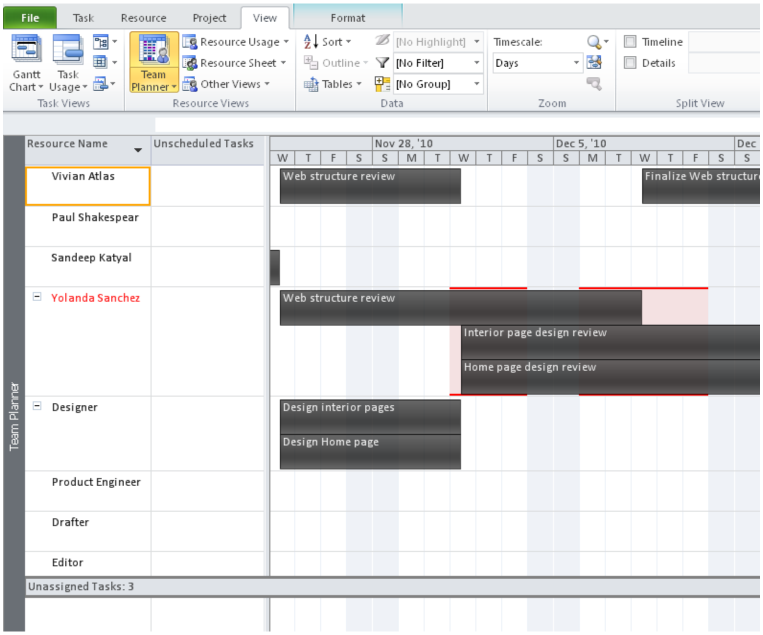


Figure 1-17 The Team Planner provides another view into your tasks, resources, and assignments.

For more information, see "Reviewing Assignments with the Team Planner."

- **SharePoint integration for workgroup collaboration** With Project Standard 2010, you can save a project file to a SharePoint site. Project Professional 2010 takes this further with the ability to publish a project schedule to a SharePoint task list. You can also create projects from a SharePoint task list or convert a list into a Project 2010 schedule. Either way, the schedule information in SharePoint and Project 2010 are synchronized. In addition, you can receive task updates from team members, and those updates are also synchronized.

For more information, see Chapter 21, "Collaborating as a Team by Using SharePoint."

- **Inactive and active tasks** You can remove tasks from the active schedule while still keeping the task information intact in the project plan. By making tasks inactive, you can run what-if scenarios to see the impact of removing tasks. If you decide to keep those tasks in the plan, you can reactivate them with a single click. The information for inactive tasks is dimmed, as shown in Figure 1-18, and is removed from the schedule calculations. Reactivated tasks have their information recalculated in the schedule as they were before they were made inactive. Keeping inactivated tasks in the project plan is also a good way to record scope cuts, which can be useful information for project archives and future projects.

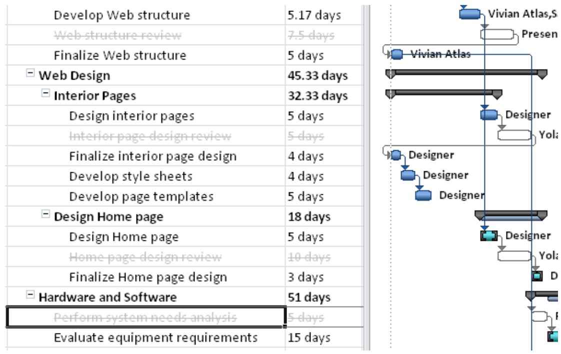


Figure 1-18 Inactivated tasks still show as "ghost" images in your project plan. You can reactivate them later if needed, or just keep them for archival purposes.

For more information about deactivating tasks, see "Changing Project Scope" on page 436.

What's New in Project Server 2010 and Project Web App

In Project Server 2010 and Project Web App, a multitude of new features work together to facilitate portfolio analysis and decision making, project scheduling, resource management, and reporting. Built on the Microsoft SharePoint Server 2010 platform, this provides complete start-to-finish enterprise project management (EPM) and project portfolio management (PPM) solutions on a single server, with a familiar and consistent user interface.

Managing Portfolios

Project portfolio management (PPM) encompasses the methods by which an organization can analyze, prioritize, and maximize proposed projects, and then execute the selected projects while being ever mindful of the overall progress, cost, and resource utilization throughout. The objective of project portfolio management is to achieve the ideal mix of projects that can enable the organization to achieve its strategic goals.

- **Integrated project and portfolio management** In Project 2007, the portfolio management features were handled on a separate, add-on server platform. In Project 2010, project portfolio management functionality is now completely integrated with enterprise project management in the Project Web App user interface. The result is a common and interconnected user experience throughout the entire project portfolio management life cycle.

- **Demand management system** The heart of the project portfolio management capabilities implemented in Project Server 2010 is the demand management system. In this context, *demand management* is the system for selecting project proposals against the organization's strategic business objectives, and then governing the execution of selected projects against a defined workflow that ensures the fulfillment of key indicators at identified checkpoints in the project life cycle. Different enterprise project categories can be defined and associated with a workflow, a project, and a template.

- **Workflow configuration** As a major component of the demand management system, the *workflow* defines each step in the life cycle of a project. In fact, the workflow essentially implements the demand management system. The portfolio manager can configure all aspects of the workflow to reflect the characteristics of the organization and to ensure the appropriate level of governance. The workflow typically begins with the initial project proposal and includes all approval steps along the way, through to project selection, execution, and closure. The project manager can track the status of the project in all the steps of the workflow. You can use the Project Web App workflow module to define one or more workflows for the different categories of projects in your organization, as shown in Figure 1-19. New enterprise custom fields provide the flexibility that portfolio managers need to customize their workflows.

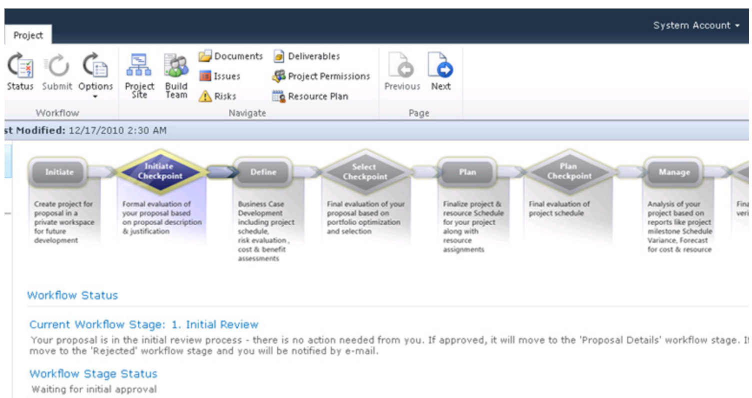


Figure 1-19 New in Project Web App is the ability to view the project workflow.

- **Business driver definition** The identification and prioritization of key business objectives or development areas for an organization is another significant component of the demand management system. Examples might include increasing profit, expanding into new markets, or increasing customer satisfaction. The portfolio manager and others in the leadership team can objectively weigh and prioritize proposed projects against business objectives and more quickly come to a consensus about which projects have the most merit and have the most potential for fulfilling the organization's strategic goals. As shown in Figure 1-20, Project Web App includes an intuitive visual interface for defining and prioritizing business drivers.

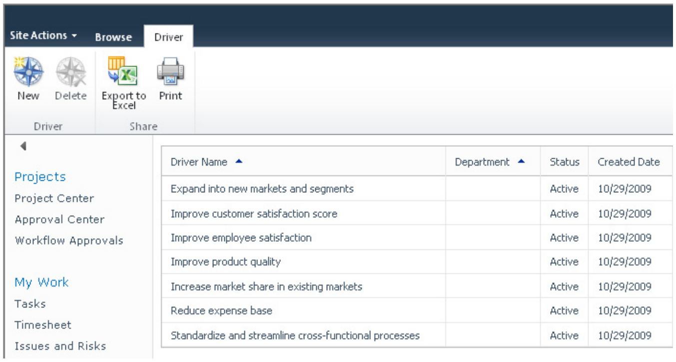


Figure 1-20 An organization can define and prioritize business drivers to help analyze which projects will work toward strategic goals.

- **Portfolio analysis tools** In Project Web App, portfolio managers and executives can use business drivers, the optimizer, and planning tools to analyze the projects in the portfolio. They can see which projects hit the target for key business drivers and can analyze which projects are best meeting the business drivers for that function, within given cost and resource constraints. They can optimize portfolios based on different filters, such as strategic value, financial value, resource utilization, and risk. As shown in Figure 1-21, the views and user interface in Project Web App provide flexibility and perspective and, therefore, can improve project portfolio decision making.

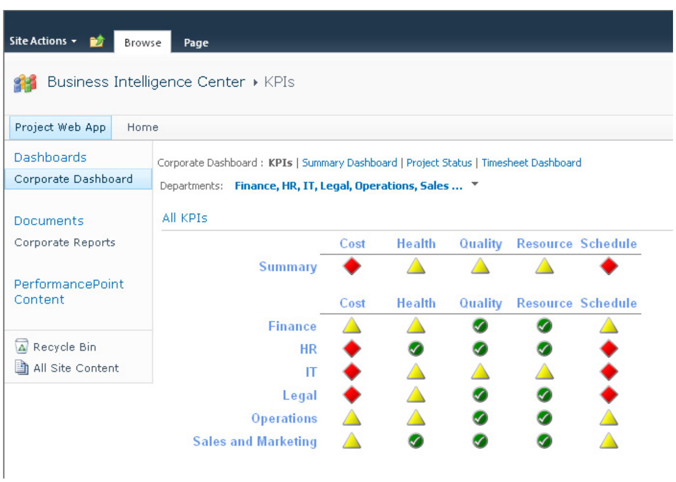


Figure 1-21 In Project Server 2010, visibility and reporting of key performance indicators are now available.

For more information about project portfolio management and demand management, see Chapter 27.

Planning Projects and Resource Capacity

Project managers can now use Project Web Access to edit projects in ways similar or identical to editing projects in the Project Professional user interface. As a result, updating project information is more intuitive and efficient and can be performed wherever project managers have a web browser and Internet access. In addition, a new resource capacity planning feature set makes it possible to maximize resource utilization across the organization.

- **Schedule creation and update** Project managers can build a new schedule and also make simple edits and updates from within Project Web App. In addition, change highlighting and multiple-level undo features are also now available in Project Web App.

- **More robust projects in Project Web App** Project managers can now create projects with more than 100 tasks, a previous limitation in Project Server. Project managers can also assign multiple resources, define task hierarchy in outlines, and set dependencies with task links, all working in Project Web App. (See Figure 1-22.)

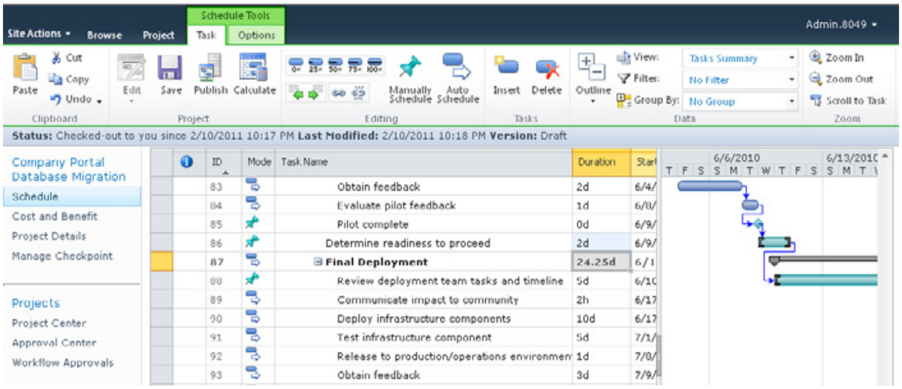


Figure 1-22 Project managers now have much more scheduling flexibility and power when creating and updating schedules in Project Web App.

- **Manual or automatic task scheduling** As in the Project 2010 desktop version, in Project Web App, project managers can now choose whether tasks are scheduled manually or automatically. With manually scheduled tasks, you can set durations, start dates, and finish dates without having those entries recalculate other aspects of the schedule. With automatically scheduled tasks, you can have Project 2010 calculate dates and durations as before. You can have a mix of manually and automatically scheduled tasks, and you can convert one to the other.

- **Resource capacity planning** Project and portfolio managers can view resource capacity across the organization, ensuring maximum resource utilization. This provides insight into demand and availability of generic resources over time. Projects can be rescheduled to maximize resource utilization while maintaining the set schedule dependencies. What-if scenarios regarding staffing levels can be modeled and compared.

For information about managing project schedules and doing resource capacity planning using Project Server 2010 and Project Web App, see Chapter 24.

Tracking Project Status and Timesheets

In Project 2010, time and task progress tracking, status reporting, approvals, and Microsoft Exchange Server integration have been improved.

- **Time reporting enhancements** If teams prefer, task status and timesheet updates can be unified by enabling single entry-mode through a consistent yet flexible user interface. This can save time for team members as well as project managers.

  For more information about submitting task status updates and timesheets, see "Logging Time by Using Timesheets" on page 992.

- **Consolidated approval center** The new Approval Center provides a convenient all-in-one location for managers to approve and incorporate task status and timesheet updates.
- **Delegate approvals** With the enhanced user delegation features, you can easily delegate task status and timesheet approvals to another individual, such as a resource manager or team lead.

  For more information about approving task status updates and timesheets, see "Exchanging Task Progress Information" on page 948.

- **Exchange Server integration** Team members can choose to receive and update their task status and other notifications through Microsoft Outlook or Outlook Web App. Project tasks are shown as Outlook tasks grouped by project name. No Outlook add-in is required.

  For more information about working with task updates and notifications through Outlook, see "Working with Project Tasks in Outlook" on page 998.

Viewing Project Information

You can now easily create reports and dashboards through the reporting layer built on the Microsoft Business Intelligence platform through SharePoint Server. Through the Project Web App interface, you can use these tools to better visualize and track key project performance indicators.

- **Highly customizable** The reporting and dashboard functionality is highly customizable. With the ability to set up summary and detail project information exactly as you need, you can more quickly respond to changing conditions in projects and portfolios.

- **PerformancePoint Services** PerformancePoint, part of the Microsoft Business Intelligence platform, gives you a dashboard designer with a variety of indicators. (See Figure 1-23). Create different dashboards for different purposes and audiences to help you effectively monitor and present portfolio performance.

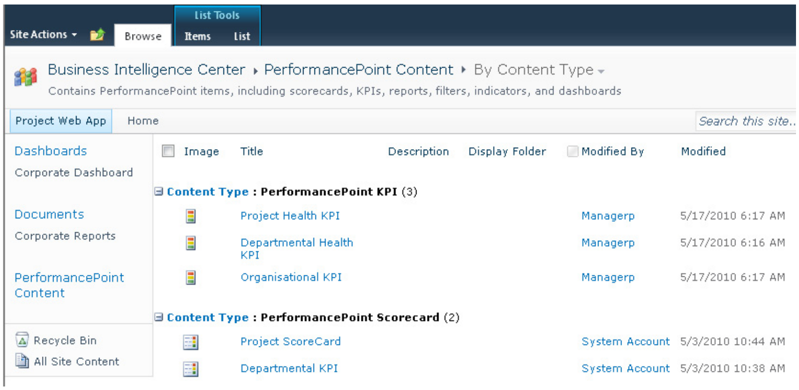


Figure 1-23 Use PerformancePoint content to create dashboards that help you or your audience see key project and portfolio status at a glance.

- **Office reporting services** In addition to PerformancePoint Services, you can use Excel Services, Visio Services, PowerPivot for Excel 2010, and SQL Reporting Services to publish information from a Microsoft Office application.

- **Predefined report templates** You can choose from a variety of predefined report templates that reflect project reporting best practices. Examples include reports on key performance indicator by department, project costs, resource capacity, issues and risks, workflow chart, and more.

For more information about creating and using reports and dashboards, see "Analyzing and Reporting on Project Information" on page 1021.

Working with Commands and Tools

With Project Server 2010 built on the SharePoint Server 2010 platform and the adoption of the ribbon in Project Web App, users experience a more consistent user interface as they move between Project Professional 2010, other Microsoft Office applications, and other SharePoint sites to work in Project Web App.

- **Built on SharePoint Server 2010** Project Web App uses the familiar SharePoint Server interface. In addition, SharePoint enterprise search makes it easy to find project information, including tasks, resources, documents, and more. In addition, teams can be connected and communication enhanced through the use of all the capabilities of SharePoint. This includes wikis, blogs, discussion forums, My Sites, document libraries, and more.

- **Ribbon interface** In Project Web App, the menus and toolbars have been replaced with the ribbon for easier access and grouping of major functions. As shown in Figure 1-24, commands are logically arranged in tabs and groups that are presented graphically and dynamically, depending on which area of Project Web App you're working in.

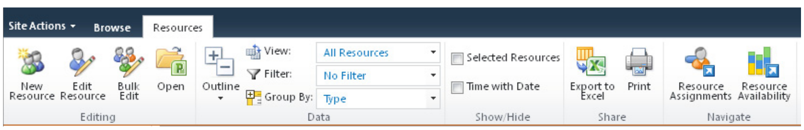


Figure 1-24 Project Web App now uses the ribbon to present commands graphically and dynamically.

For more information about the ribbon, see "Using the Project Ribbon" on page 30.

- **Microsoft Visual Studio Team Foundation Server** Through interoperability with Visual Studio, the world of application development can be easily connected with that of project and portfolio management.

Managing the Project Server

Project server administration functions are simplified in Project Server 2010 and Project Web App. User setup, Project Web App configuration and customization, and security features are centralized for project and portfolio administration.

- **Centralized project server administration** The server settings console provides all project server administration functions in one centralized location for both project and portfolio management capabilities, as shown in Figure 1-25. This includes everything from setting up users and their permissions to setting up project workflow settings.

Figure 1-25 Use the Server Settings page in Project Web App to carry out most project server administrator functions.

- **Project access permissions** Within the Project Web App Permissions function, project managers can expand on what the security model allows to create and modify resources and set basic view permissions to better control who has the rights to view or edit projects.

- **Delegate users** With enhanced delegation, users can identify colleagues to act as their delegate when needed. The project server administrator no longer needs to set up delegation rights between users.

- **Custom enterprise fields** Project server administrators and portfolio managers can use custom enterprise fields to customize enterprise project templates the way they're needed throughout the organization. With the custom departmental fields, users in specific departments can focus on their own data, filtering out information that doesn't apply to them. With these custom departmental fields, enterprise project types, resources, and custom fields can be associated with specific departments to maintain the relevancy of project data.

- **Administer reporting cubes** Through the improved interface for working with reporting cubes, project server administrators and portfolio managers can easily add, edit, copy, refresh, and delete reporting cubes.

- **Enhanced customization and scalability** To extend functionality and integrate project information with other applications, Project Server 2010 uses the applications programming interface (API) called the *Project Server Interface (PSI)*. With the PSI, you can access the properties of objects such as Project, Task, and others, and thereby integrate information between your project server and other organizational systems that interact with project management processes, such as accounting, procurement, or human resources. In Project 2010, enhancements to the PSI provide for easier customization to Project Server and Project Web App. Customization is also enhanced by SharePoint Server 2010 and Visual Studio 2010.

For information about the Project Server Interface, refer to the Project 2010 Software Development Kit (SDK), available on the Microsoft Developer Network (MSDN) at *msdn.microsoft.com/en-us/library/ms457477.aspx*.

- **Hosted Project Server solutions** Through one of several Microsoft Project partners, you can access and configure web-based hosting for your enterprise project management solution. Through a third-party hosting provider such as Project Hosts, you can speed up enterprise project management deployment for your organization and reduce your IT infrastructure costs.

For more information about third-party hosting partners, see "Analyzing Your Project Server Requirements" on page 1241.

Using the Project Ribbon

With Project 2010, the Microsoft Office ribbon and Quick Access Toolbar are introduced to the Project user interface. This is a substantial change to the way you access Project 2010 features and tools. If you've been working with any other Microsoft Office applications that use the ribbon and Quick Access Toolbar, you have a head start in understanding how commands are organized. Instead of arranging commands in menus and toolbars, the ribbon presents commands graphically and logically organized in tabs and groups, as shown in Figure 1-26. Often the tabs change depending on which view you're showing. The Quick Access Toolbar shows a handful of the most commonly used commands.

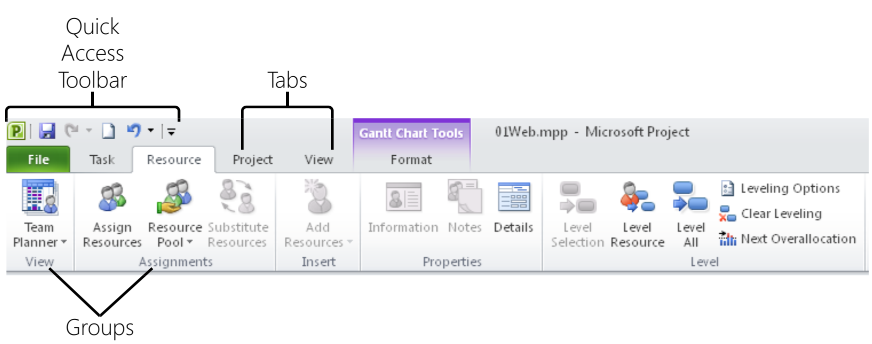


Figure 1-26 Use the ribbon to find and use Project 2010 commands and tools.

Throughout the procedures in this book, directions to find a command are given in the following format: "On the Task tab, in the Schedule group, click Link Tasks." Sometimes the directions are abbreviated to something like "Click Task, Schedule, Link Tasks."

> **Note**
>
> **The look of the ribbon adjusts according to the resolution of your screen and the size of your Project 2010 window. Narrower screens show all groups, but the buttons might be smaller or moved to a drop-down menu instead of appearing directly on the ribbon.**

Minimizing and Expanding the Ribbon

You can hide the ribbon so that only the tab labels are showing, without a tab's groups or buttons. When you click a tab in the minimized ribbon, the full ribbon appears. After you click a button, the ribbon is minimized again. This is a great way to give yourself more working space in the project plan, either temporarily or after you're familiar with where commands are on the ribbon.

Minimize The Ribbon

In the upper-right corner of the Project 2010 window, click the Minimize The Ribbon icon.

Expand The Ribbon

To show the full ribbon again, in the upper-right corner of the Project 2010 window, click the Expand The Ribbon icon.

Using Keyboard Shortcuts to Access Commands

Even though menus are gone, you can still quickly apply commands with keyboard short-cuts, called *access keys*. Every command on the ribbon can be executed by using access keys, which get you to a command in two to four keystrokes. To use access keys to execute a command on the ribbon, follow these steps:

1. Press and release the Alt key.

   KeyTips are displayed above each feature in the current view, as shown in Figure 1-27.

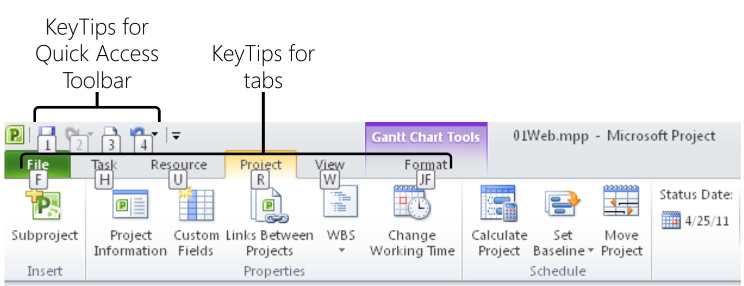


Figure 1-27 Press and release the Alt key to show the KeyTips on the ribbon and Quick Access Toolbar.

2. Press the letter shown in the KeyTip that corresponds with the tab you want to use. Do this even if the tab you want is already showing.

   The tab you select becomes active, and the KeyTips for the features on that tab appear, as shown in Figure 1-28.

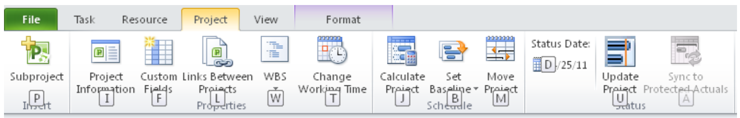


Figure 1-28 KeyTips appear for all features on the selected tab.

3. Press the letter shown in the KeyTip that corresponds with the command you want.

   Depending on the command, a dialog box might open, a drop-down menu might appear, or the command might be executed.

> **Note**
>
> **To cancel the use of the KeyTips, press and release the Alt key or the Esc key.**

To use access keys to execute a command on the Quick Access Toolbar, follow these steps:

1. Press and release the Alt key.

2. Press the KeyTip number that corresponds to the command you want.

   The command is executed.

> **Note**
>
> **KeyTips do not work in the Project Web App ribbon. Because Project Web App is a web-based application, when you press the Alt key, it activates the browser menu for the keyboard instead of showing KeyTips in the ribbon.**

Finding Lost Commands

Suppose that you used a certain command in earlier versions of Project, and now you can't find it on the Project 2010 ribbon. Locate it by following these steps:

1. On the File tab, click Options.

   The Project Options dialog box appears.

2. In the left pane, click Customize Ribbon or Quick Access Toolbar.

   A list of commands appears in the Project Options dialog box.

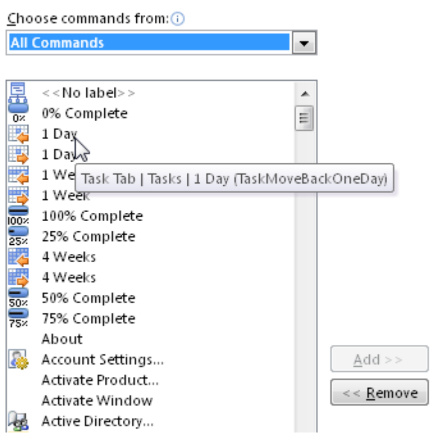
3. In the Choose Commands From box, click All Commands.

   All commands throughout Project 2010 are listed.

4. Scroll through the list to find the command you want.

5. To find where the command is located on the ribbon, rest the mouse pointer over the command name.

   The location of the command appears, including the name of the tab, group, and command.



The commands are listed in alphabetical order. You might need to look in a couple different places if you're not sure of the exact command name.

You might also try clicking Commands Not In The Ribbon in the Choose Commands From box. If you need to use a command that's not on the ribbon, you can add it to the Quick Access Toolbar or to a custom group.

For more help on finding commands, use the interactive ribbon guide in Project 2010 online Help at *www.microsoft.com/project/en/us/ribbon_guide.aspx*. Click a graphic of the toolbars and menus from Microsoft Project 2007 to learn where those commands are located on the Project 2010 ribbon.

Customize the Ribbon and Quick Access Toolbar

You can customize the ribbon in a variety of ways. You can add a custom group with the commands you want to an existing tab. You can even create your own custom tab with custom groups arranged on them. For details, see "Customizing the Project 2010 Ribbon" on page 1153.

You can also customize the Quick Access Toolbar with commands you use most frequently. For details, see "Customizing the Quick Access Toolbar" on page 1146.

Learning as You Go

As you work in your project plan, you can quickly get assistance and other information when you need it—from online Help, from discussion forums, and from Project 2010 feedback while you're working.

Note

Previous versions of Microsoft Project included a set of project guides that provided instructions, controls, and wizards to help set up tasks and resources, track progress, or generate reports. Project guides are discontinued in Project 2010. The ribbon takes on some functionality that was previously carried out by the project guides. In addition, you can use Visual Basic for Applications (VBA) to enable any custom project guides you created.

Getting Help

You can find Help topics to assist you with your project plan. A set of Help topics is installed and available with Project 2010 on your local computer. A more comprehensive set of Help topics and other forms of assistance are available on the web through Office.com. You can:

- Browse Project Help contents.
- Search for topics using key words or phrases.
- Browse for more Project Help on Office.com.
- Join and ask questions from a Microsoft Project discussion forum.

Browsing Project Help Contents

If you want to see a list of Help topics, follow these steps:

Help

1. In the upper-right corner of the Project 2010 window, click the Help icon.

   You can also press F1 or, on the File tab, click Help, and then click Microsoft Office Help.

   Project Help appears in a separate window, as shown in Figure 1-29.

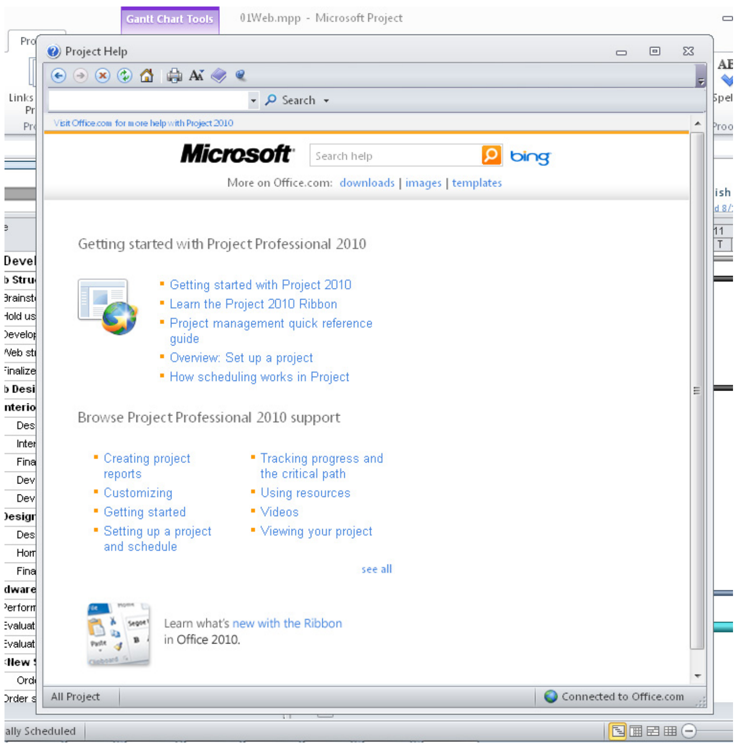


Figure 1-29 Browse through the list of Project Help topics.

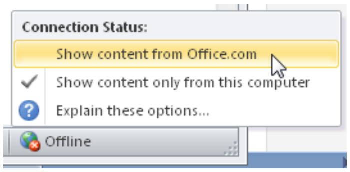
2. Click the name of the category you want. If necessary, click a topic under the Subcategories section.

3. Under Topics, click the link for the Help topic you want to view.

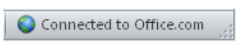
If you're connected to the Internet and Office.com, you see even more categories and topics listed in the Project Help window.

INSIDE OUT **Get better Help results by connecting to Office.com**

You can toggle whether Project 2010 presents Help from your local computer or from Office.com on the web. The current mode shows in the lower-right corner of the Project Help window. If you click the mode button, a menu appears with other choices.



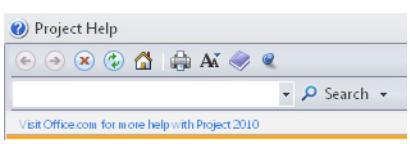
Help works the same whether or not you're connected to Office.com. You can browse categories and topics as usual; the difference is that more categories and topics are available on Office.com because more are being added over time. Also, when you search on a certain word or phrase, you tend to see better results when you're connected to Office.com.



Searching for a Specific Topic

Rather than going through a hierarchical list of topics, sometimes it's faster to just ask a direct question and get a direct answer. If you prefer to get your help that way, search using a question or phrase as follows:

1. In the upper-right corner of the Project 2010 window, click the Help icon.
2. Near the top of the Project Help window, click in the search box.



3. Type the word, phrase, or question in the search box, and then click Search.

   The Project Help window appears with a list of Help topics related to your question, as shown in Figure 1-30.

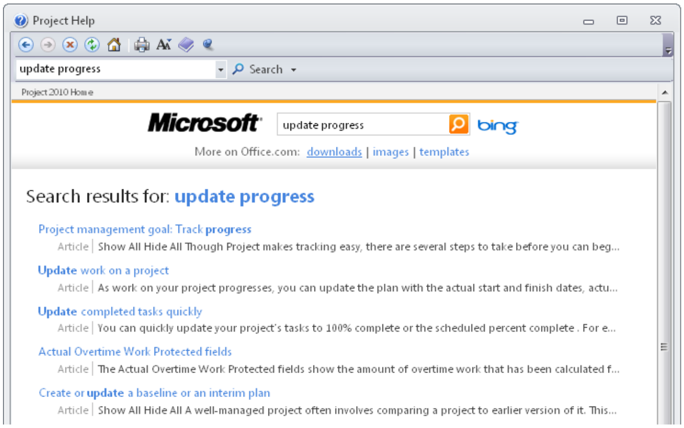


Figure 1-30 The Project Help window lists topics related to your search question.

4. Click a topic that matches what you're looking for, and then read the article about your question.

Back

5. To read a different Help topic that was listed, click the Back button to return to the list of topics, and then click the other topic.

TROUBLESHOOTING

The Project Help window is obstructing your work

When you search for help, the Project Help window appears and floats over the top of your Project 2010 window. Even when you click in the Project 2010 window, the Project Help window stays on top.

The window is designed to stay on top like this because you might want to follow a procedure in a Help topic while working in Project 2010. If this is the case, resize the Project Help window and drag it to the side so that you can still read it but it's out of the way of your work.

If you don't need the Project Help window showing right this minute but want to keep it handy, click its Minimize button to temporarily move it out of the way.

Getting Help for Project Fields

There is a Help topic for each and every field in Project 2010. One way to find such topics is by browsing the Project Help contents, as follows:

1. In the upper-right corner of the Project 2010 window, click the Help icon.

   
   Home

   If the Project Help window is already open, click the Home button in the Project Help toolbar.

2. If you're accessing Project Help through Office.com, under the categories, click See All, and then click Reference.

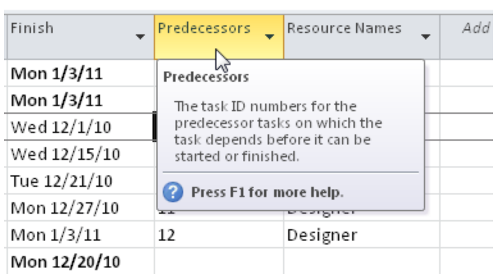
   If you're accessing Project Help from your offline computer, click General Reference.

3. Under Subcategories, click Available Fields Reference.

4. Click the topic for the field you want to learn more about.

   Each field reference topic includes best uses, examples, calculations if applicable, and particular issues to be aware of when working with this field.

You can also open a field reference Help topic if the field is showing in a table. Position your mouse pointer over the column heading; a ScreenTip pops up that provides a brief description of the field. Press F1 while the ScreenTip is showing to display a Help topic for the selected field in a separate Help window.



INSIDE OUT Help for dialog boxes doesn't help

Many of the more complex dialog boxes in Project 2010 include a Help button. In previous versions of Microsoft Project, you could click that button and read an associated Help topic.

In Project 2010, however, the main Project Help window appears, showing the Home-level Help categories. You have to find the appropriate Help topic yourself.

Your best bet is to browse through those categories to find the topics that seem most related to the dialog box.

Finding Project Assistance on the Web

You have already seen how you can search on a keyword or browse the contents of Project Help topics on Office.com on the web. As long as you're connected to the Internet, you can also simply open Office.com in a full web browser window. To do this, follow these steps:


Getting Started

1. On the File tab, click Help, and then click Getting Started.

   Even if you don't want to see the Getting Started Help topic, this step gets you to the right place quickly.

   The Office.com website appears in a separate web browser.

2. If the Getting Started with Project 2010 page is not showing, click Project, as shown in Figure 1-31.

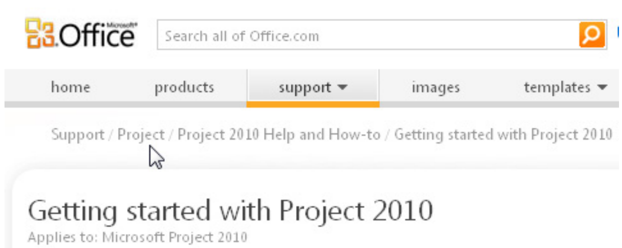


Figure 1-31 If necessary, click Project to see resources for Project 2010 on Office.com.

The Project page appears, as shown in Figure 1-32. This page includes links to videos, training, interactive guides, and more information.

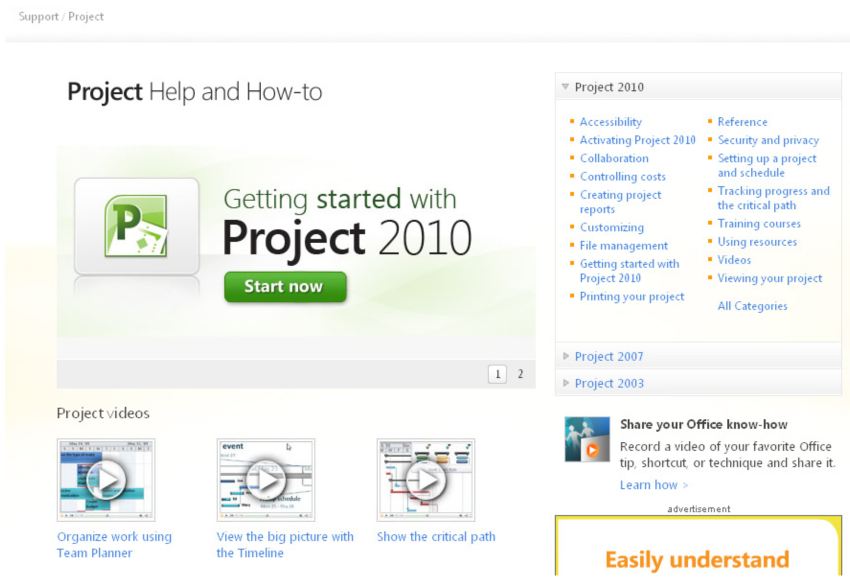


Figure 1-32 The Project page on Office.com includes a variety of online resources from which to learn more about Project 2010.

Following Project 2010 through Social Media

You can keep up with tips, techniques, and news about Project 2010 through the following social media channels:

- **Facebook** *www.facebook.com/pages/Microsoft-Project/95221953802*
- **Twitter** *twitter.com/ProjectHelpTeam*
- **MSDN blog for Microsoft Project** *blogs.msdn.com/b/project/*

Joining a Project Forum

It's often easiest to learn from your more experienced buddies. A built-in group of knowledgeable friends willing to help can be found on Office.com. There you will find a Project 2010 discussion forum that can help you find answers to your questions and where you can also learn from questions posed by other users. To find and join a Project 2010 discussion forum:

1. In the address bar of your web browser, enter **www.answers.microsoft.com**.
2. Under Microsoft Office, click More Office Products.
3. Under Answers By Forum, in the Visio, Project, InfoPath, And Access line, click Project.

   The forum page for Microsoft Office For Business Users: Visio, Project, InfoPath, And Access appears, with the discussion items filtered for Microsoft Project.
4. Click in the Office Version box, and then click Office 2010.

   The discussion items are now filtered for Project 2010, as shown in Figure 1-33.

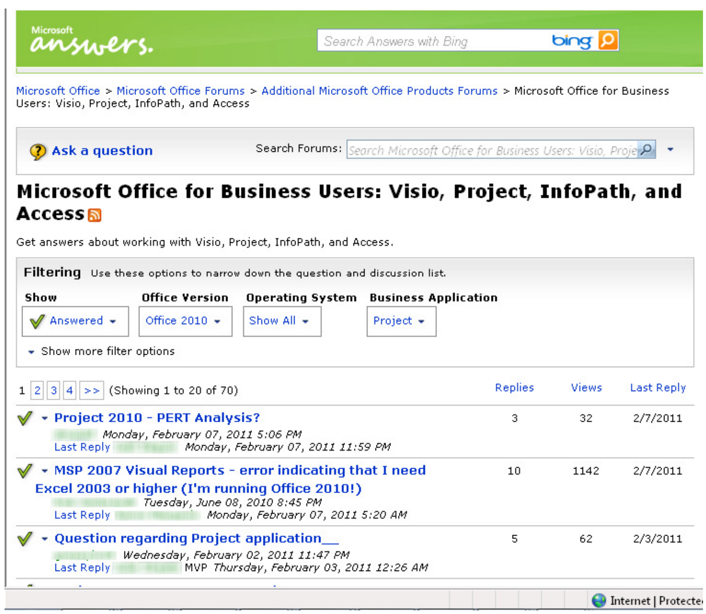


Figure 1-33 The Project discussions page represents a community of Project users and experts who ask and answer questions.

You can search for a particular topic or browse through a list of topics.

5. Before you ask a question, check whether your question has been asked (and answered) previously. Enter a keyword or phrase in the Search Forums box.

   It's a great idea to do this before posting a new question, especially if you're a newer user.

6. If you don't find anything in the archives that answers your question, click the Sign In button to sign in with your Windows Live ID, and then click Ask A Question. A form appears in which you can type your question and post it to the discussion forum.

You'll find that you get great answers to your questions, often quite quickly. If you stick around long enough, you'll soon find that you're knowledgeable enough to answer others' questions. To reply to an existing question, click the Reply button. Enter your answer and post it to the discussion forum.

More advanced Project 2010 users might find the TechNet discussion forums useful.

1. In the address bar of your web browser, enter **www.technet.microsoft.com**.
2. In the menu bar, click Forums.
3. Scroll down and click one of the forum categories under Project Professional or Project Server.

For more information about discussion forums and additional resources to help you learn and use Project 2010, see Appendix B, "Online Resources for Project 2010."

Working with Indicators and Option Buttons

When you make certain types of adjustments to your project plan, Project 2010 presents an indicator with an option button, as shown in Figure 1-34. This is interactive feedback that specifies the action you've just taken, along with implications that the action might have. You see information, especially in certain ambiguous situations, to ensure that the result is really your intention. You also see options to switch to a different action if you intended a different outcome.

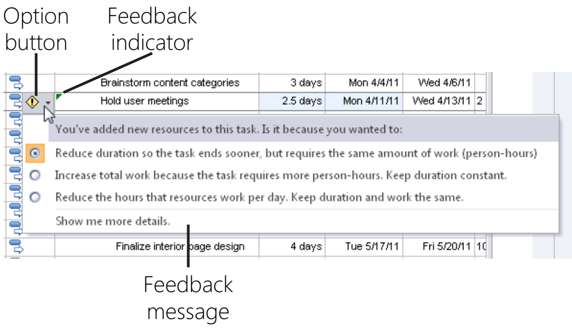


Figure 1-34 An indicator shows as a green triangle in a cell that contains a potential issue that Project wants to confirm. When you move your mouse pointer over the green triangle, the option button appears. Click the button to display the options in a drop-down menu.

Indicators and option buttons might appear for four operations:

- Changing resource assignments
- Changing start or finish dates
- Changing work, duration, or units
- Deleting a task or resource in the Name column

The indicator appears in the cell as long as the edit is available for an Undo operation. After you make a new edit, the indicator disappears.

You can turn off the display of indicators and option buttons. On the File tab, click Options, and then click Display in the left pane. Under Show Indicators And Option Buttons For, clear the check boxes for the categories of changes for which you don't need indicators.

For more information about using the indicators and option buttons for scheduling feedback, see "Changing Resource Assignments" on page 314.

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