

# MS Project Tips and Tricks



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- Background in teaching, Business & IT
- Taught MS Project 400 at least times
- Specializing in MS Project/MS Project Server
- Author: Managing Projects using MS Project 2010 desktop courseware available from MVP-Press
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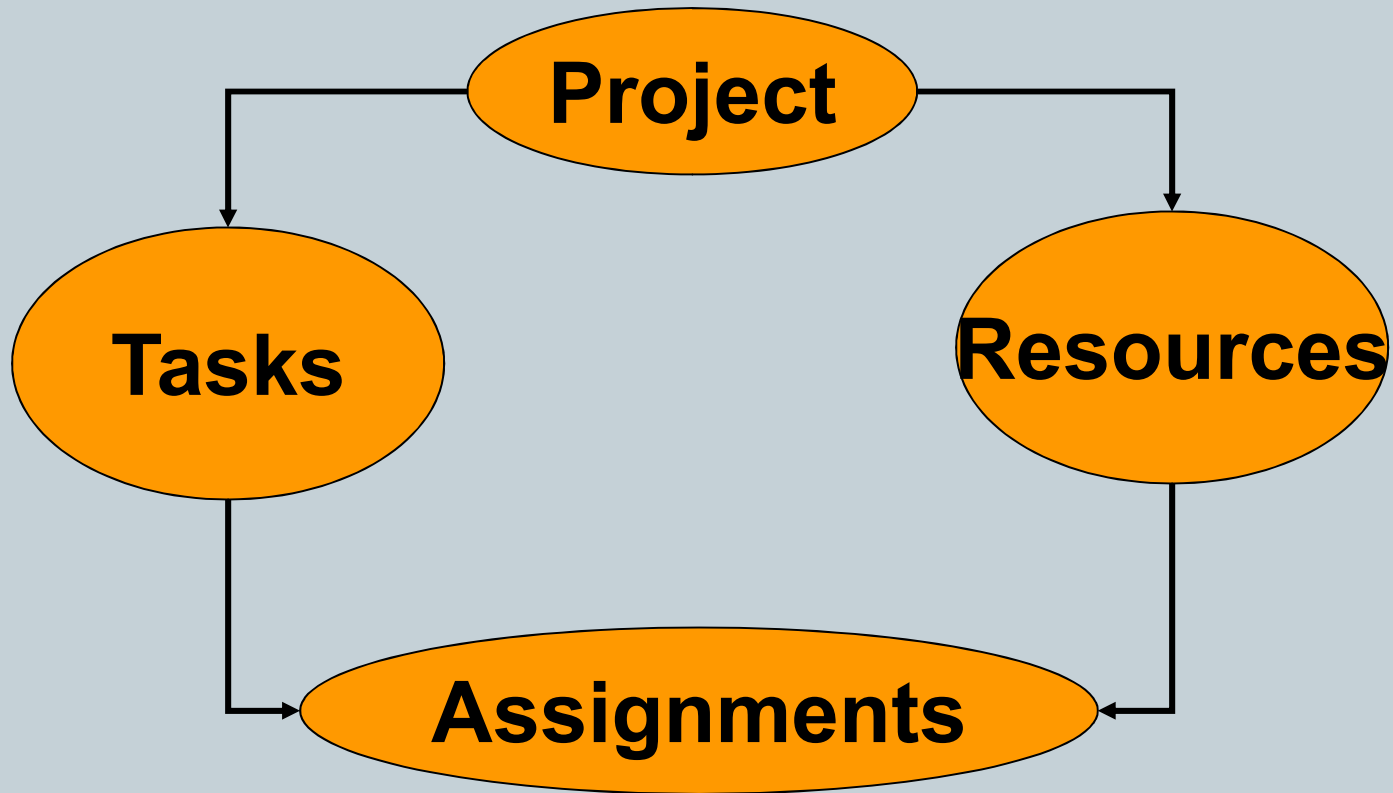
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# Key Take-A-Ways



- What is the design of the MS Project database
- 15 tips and tricks you help you use MS Project easier
- Open Questions

# The Basics about MS Project – Database Design

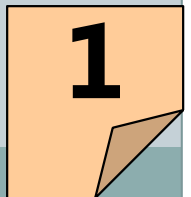


Views and Tables are the access points to see the data and are specific to an area of the database.

# Tip - #1 Before you enter the first task



1. Set the Project Start Date
2. Apply which calendar will be the project calendar
3. Options:
  1. Calendar options
  2. Scheduling options
    1. Duration standard
    2. Hours standard
    3. Task Type
    4. Effort-driven setting



# Tip - #1 - Change Working Time



- Calendar and Calendar options must be in place before entering a task
- Change Working Time allows for changing and creating calendars. Think of this function as a way of accessing the calendars that are available to be used within the project.
- The calendars are not active until they are assigned to a resource, to the project or to a task.
- Calendars can be copied using the Organizer into the Global.mpt for use in other projects.

An orange sticky note with a folded bottom-right corner, containing the number 1 in a bold black font.

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## Tip - #2 – Viewing an alternate calendar



- When an alternate calendar is selected for the project calendar, the Gantt views will continue to display the Standard calendar. To change the views to show the alternate calendar.
  - Right click on a Gantt view, select Non-working time and alter the calendar viewed for the specific view.
- This change is unique per view and will need to be changed in all Gantt chart and Usage views used.

## Tip - #3 Project Headers & Footers



- Headers and Footers values are not programmed into the project files
- Values entered are per view and will need to be entered for each view that will be printed.
- Minimum Values that should entered are Report Titles and date.

## Tip - #4 - Keystrokes that really help:



- F3 will remove a filter
- Insert key will insert blank lines
- Delete key will delete task lines
- Deleting a Summary task will delete all detail tasks within the Summary task
- When dragging tasks around to change location always move tasks from the ID number on the left of the views
- Right clicking = more options

## Tip - #5 – WBS



- When creating a WBS Indent from the top down. When removing an indentation work from the bottom up and Outdent.

## Tip - #6 – Run time filter

- Create a run time filter
- Enter run values when the filter is executed
- If using customized fields with lookup tables the lookup values will be available to select a value
- In the Value column of the Filter define enter:  
ie: "Enter Location name"?

Filter Definition in 'Commercial Construction.mpp'

Name:   Show in menu

Filter:

And/Or	Field Name	Test	Value(s)
	Location	equals	"Enter Location Name"?

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## Tip - #7 – Timeframe groupings and Resource Group



- Create a Group to Group tasks by Start or Finish dates by weeks.
- Group → New Group, Enter group name, Group by is Start or Finish, Define Group Intervals
- When an assignment is created the Resource Group is populated on the task. Use the Resource Group filter to filter tasks for specific groups.

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## Tip - #8 – Total Slack



If Total Slack is:

- Positive = available slack
- Large Positive value = Probably missing relationship
- Negative = project is miscalculated  
Caused by Constraint or Deadline



## Tip - #10 – Constraints don't change when start date changes



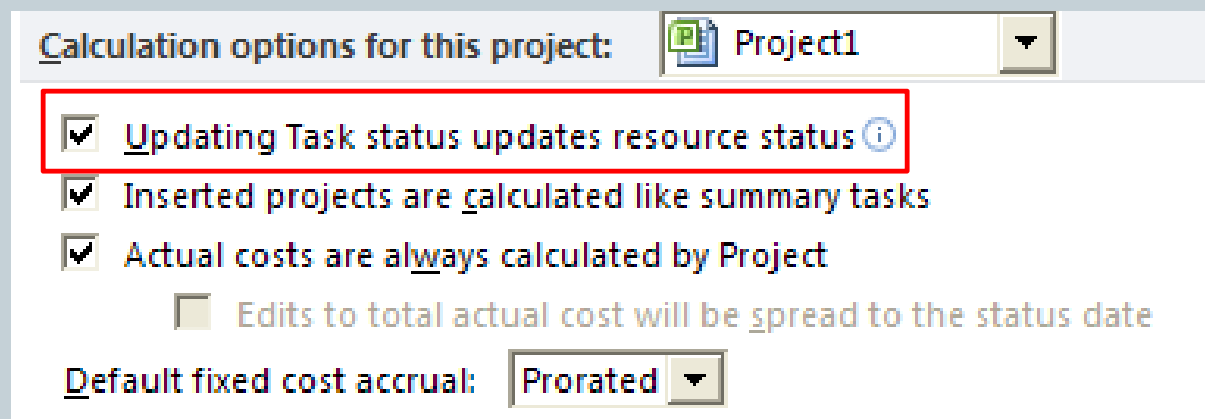
- When a start date is edited the Constraints and Deadlines within the project schedule do not adjust to the new start date.
- Solution: in MS Project 2010 use the Move Project button on the Project ribbon to change the Start date. The option to adjust the deadlines is available.
- In earlier versions there is a button called Adjust Dates located on the Analysis toolbar. Use this button to adjust the Constraints to the new project start date. The ability to adjust deadlines is not available in the earlier versions of MS Project.

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# Tip - #11 – Percent Duration v. Work Completed

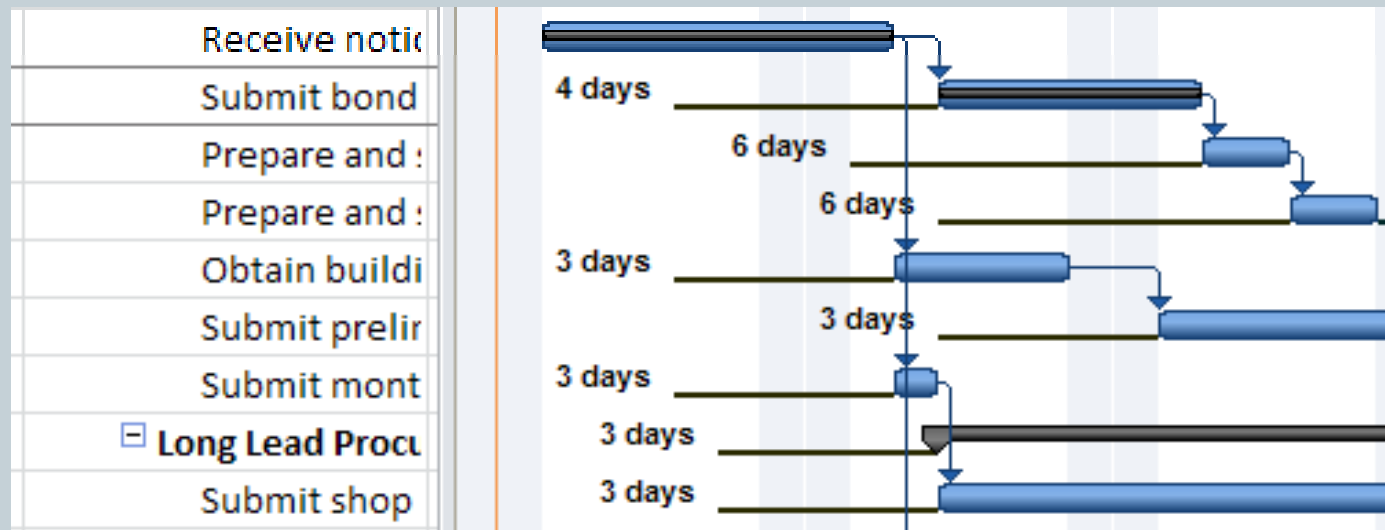


- Percent complete on the Tracking Gantt and on the Tracking percentage buttons is Percent Duration completed.
- There is a second percent complete called Percent Work completed.
- When you mark a task 100% complete it is assumed that 100% of the work has been completed also and the Start and Finish dates will become Actual Start and Actual Finish for the task.
- These values may be separated using the option Schedule → Updating Task



## Tip - #12 – Detail Gantt View

- The best view to see slippage (Variance) between Baseline v Actual Work is the Detail Gantt view



## Tip - #13 – New Window



- To combine projects on a temporary basis for reporting and linking tasks between projects.
- Keystrokes:
  - Open the files to be combined.
  - Click on New Window button on the View ribbon in Project 2010. In earlier versions click on Window New Window.
  - Select the files to combine and click OK
- Create links across the projects or filter and group for reports. Save the files changed but do not save the temporary file.

# Tip - #14 – Task Form

- When creating an assignment use a split screen with the Gantt chart or Task Sheet above and the Task Form with the view Work or Resource Work on the bottom.
- Double click on the little bar in the lower right corner of the Gantt chart view. The Task Form will appear in the lower half of the screen

The screenshot displays a project management software interface. On the left, a 'Gantt Chart' view shows a task list with columns for days. The task 'Receive notice to proceed and sign contract' is highlighted. On the right, a Gantt chart shows a timeline from Sep 25, '11 to Oct 16, '11 with various task bars and dependencies. At the bottom, a 'Task Form' is open, showing details for the selected task. The form includes fields for Name, Duration, Start, Finish, Task type, and % Complete. Below these fields is a table with columns for ID, Resource Name, Units, Work, Ovt. Work, Baseline Work, Act. Work, and Rem. Work.

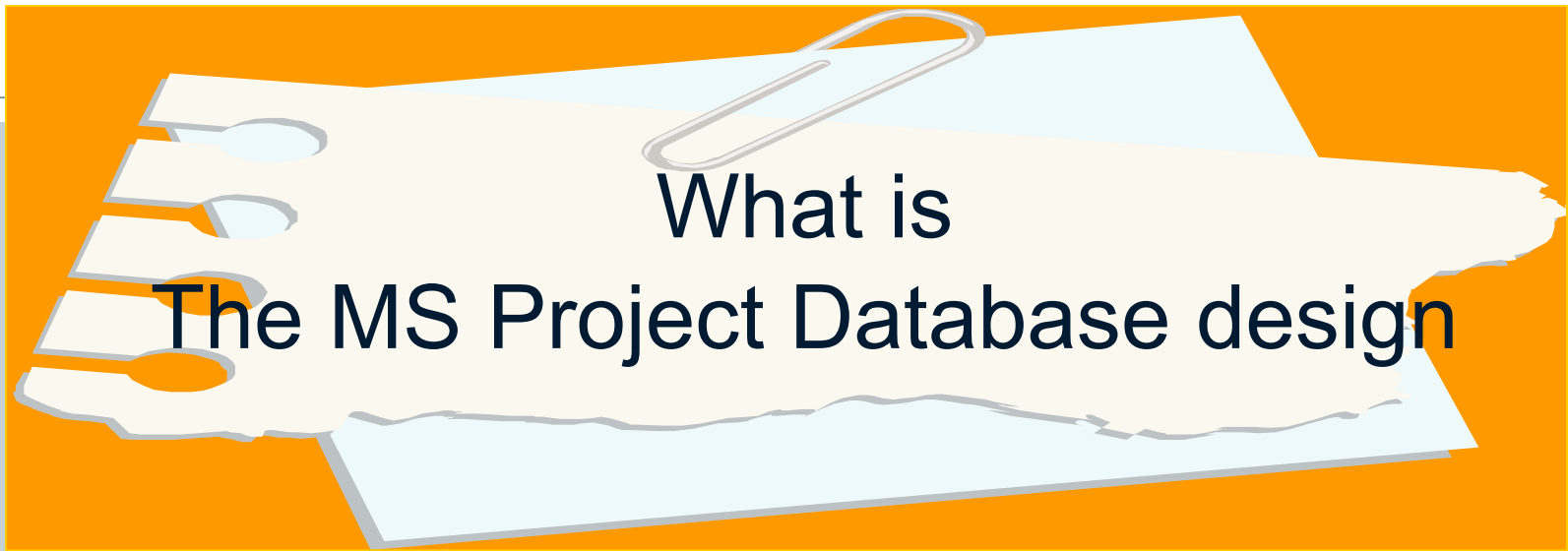
ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
1	G.C. general management	1	48h	0h	24h	48h	0h

## Tip - #15 – Printing Gantt Charts



- When printing Gantt charts set up the view to the desired look for the completed report before you click Print Preview or File→Print in MS Project 2010.
- Then go into the Print Setup settings and turn off the legend and adjust the settings.
- Gantt charts may always be printed by date range.

# Key Take-A-Ways



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*630-660-1482*

## Open Questions



- If I can't answer the question in the time allotted, I will be available after the session to talk with you one-on-one.

*Thank you for coming!!!!*



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