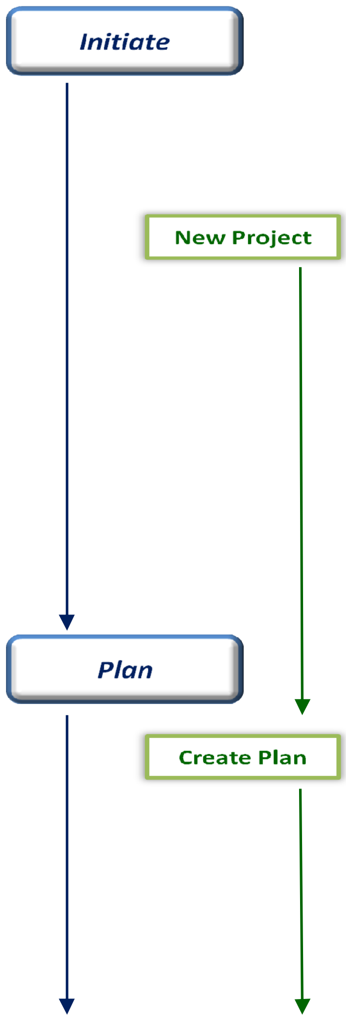
A **PROJECT** is a complex series of non-routine tasks directed to meet a specific one-time goal. The **PROJECT MANAGER** works to balance project **scope**, the **time** available to carry out the project, and the **budget** available for the project.



The **Initiating** stage of project management includes examining the strategic fit for a proposed project. Before beginning a new project, an organization must determine that the project fits in with its strategic goals. Understanding the organization’s goals can help executives identify certain proposed projects focusing on mission-critical activities as high-priority, and other projects peripheral to organization goals as lower priority. During the Initiating stage, an executive sponsor should be identified. A high-level evaluation of the project’s business case should be developed, along with project limitations and technical and financial requirements. A project manager should be identified and a placeholder project plan defined. If the project is a New Installation for a customer, the following guidelines apply.

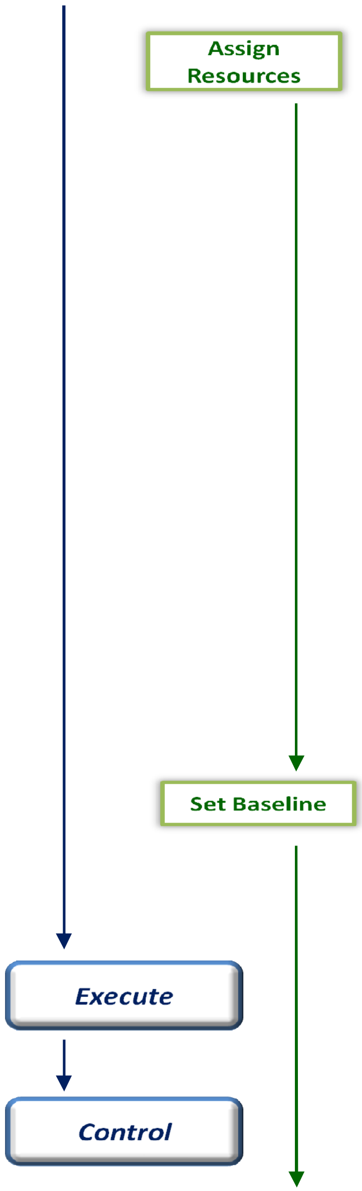
Initiate a new project

1. **Create a new project from a template:** On the **File** menu, click **New**. In the New Project task pane, click **On my computer** *(or **General Templates** in Microsoft Project 2007),* and then click the **Project Templates** tab. Select the template titled **“Template - Customer Implementation Plan”.**
2. **Specify the project start date:** On the **Project** menu, click **Project Information**. In the **Start date** box, enter your project start date.
3. **Define the project calendar:** On the **Tools** menu, click **Change Working Time**. Identify working and non-working days and times for your project.
4. **Save the project file:** On the **File** menu, click **Save As**. In the **File name** box, replace the template name with the project name. Save file in your projects folder.

The **Planning** stage devises a workable scheme to accomplish the project’s intended goals and outcomes. In the Planning stage, you identify the project’s milestones, deliverables, and tasks. This plan can be your work breakdown structure (WBS). You develop and refine the schedule, and identify the resources needed to implement the project.

Create a new plan

1. **Enter tasks:** Tasks for the implementation are reviewed for accuracy. You may delete tasks that do not apply but do not delete the Project Summary (Task ID 0), summary tasks or milestones.
2. **Outline tasks:** Create your task hierarchy including tasks and milestones under summary tasks, which can represent phases or other work divisions. Click a task (or several tasks), and then click the **Indent** or **Out dent** button on the **Formatting** toolbar. Please keep the summaries as simple as possible. The provided summary tasks are used in other reporting.
3. **Enter durations:** Click the **Duration** field for a task and enter duration, for example, type **4**. To specify a milestone without a duration, type **0d**. To indicate that a duration is an estimate, add a question mark, for example, type **6d?**.
4. **Specify task dependencies:** The Template provides dependencies. However, if you delete tasks, ensure the dependent tasks of the tasks you deleted are accurate. Select the tasks that you want to link, and then click the **Link Tasks** button on the **Standard** toolbar.



Define and Assign Resources

1. **The resource pool:** On the **View** menu, click **Resource Sheet**. You will see a standard set of resources for this project. Please do not delete as you will have to assign resources to all the tasks once more. As you will see, there are template resources listed (e.g. DSI Lead PM). You may replace the template resource with actual provided DSI resources. Highlight the DSI resource row the copy and paste over the template resource row. In the **Resource Name** field, type the names of the customer resources you will use for this project. Ensure all fields are entered for a new resource or replace the Customer and/or Physician resource with the name and add the remaining blank fields.
2. **Assign resources to tasks:** Unless a new resource or task and its dependencies are entered, there will be no need to assign resources. On the **View** menu, click **Gantt Chart**. Select a task to which you want to assign a resource. On the **Standard** toolbar, click the **Assign Resources** button. In the **Assign Resources** dialog box, click the resource name(s), and then click **Assign**.
3. **Know your task type for new tasks:** As soon as you assign resources, the task type determines how the task is scheduled. To set a default task type for the entire project, click **Options** on the **Tools** menu, and then click the **Schedule** tab. In the **Default task type** box, select **Fixed Units** (the default), **Fixed Duration**, or **Fixed Work**.
   To change the task type for an individual task, select the task, and then click the **Task Information** button on the **Standard** toolbar. Click the **Advanced** tab, and then in the **Task type** box, click the task type that you want to create.

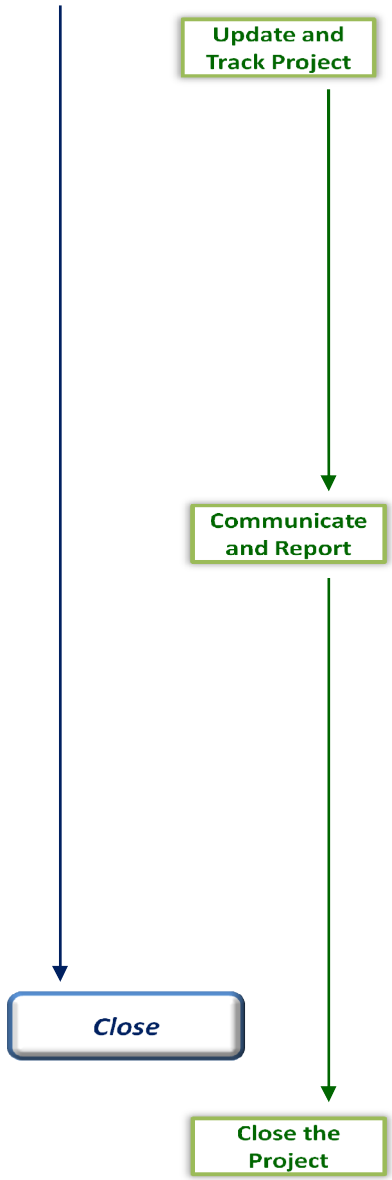
   Work, duration, and units (% allocation) are determined by the formula: **Work = Duration * Units**

Task Type	When you add or remove a resource, this changes...	When you change duration, this changes...	When you change units, this changes...
Fixed Duration	Units	Work	Work
Fixed Work	Duration	Units	Duration
Fixed Units	Duration	Work	Duration

Set the Project Baseline

1. **Save the baseline plan:** After your project plan is optimized for finish date, budget, and scope, you can submit the plan for approval. Once approved, save the baseline plan. On the **Tools** menu, point to **Tracking**, and then click **Save Baseline**.
2. **View baseline data in a Gantt Chart:** On the **View** menu, click **Tracking Gantt**. In the chart area, the baseline information is shown as the lower of the two Gantt bars for each task.
   *(In Microsoft Project 2000, click **More Views** on the **View** menu, and then double-click **Tracking Gantt**.)*
3. **View baseline data in a table:** On the **View** menu, point to **Table**, and then select **Variance**. This table includes fields for baseline and variance start and finish.

The **Executing/Controlling** stage coordinates people and other resources to carry out the plan as defined in the project plan. The deliverables in this stage focus on managing change, entering schedule updates, tracking progress, and communicating project information. Each team member performs defined tasks within the project scope, ensuring their contribution to the projectõs success.



Update Progress

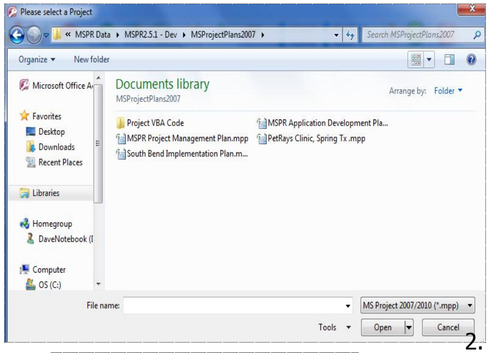
1. **Manage changes:** Modify durations, dates, dependencies, resource assignments, or tasks based on requested changes or new information. Keep the current fields up to date and compare it to the baseline.
2. **Track actual dates and durations:** It's best to decide on a single method for tracking progress. You can enter percentage complete, actual start and finish dates, actual and remaining durations, or actual and remaining work. Select the task for which you want to enter actual progress. On the **Tools** menu, point to **Tracking**, and then click **Update Tasks**. Enter progress data in the **% Comp.**, **Act. Dur.** and **Rem. Dur.**, or the **Act. Start** and **Act. Finish** fields.
3. **Track actual hours and costs:** If you want to enter actual and remaining work hours or costs, use the Tracking table. On the **View** menu, point to **Table**, and then click **Tracking**. Enter progress data in the **Act. Work** or **Act. Cost** fields for the task.
   You can also use the Tracking table to enter percent complete, actual start and finish dates, and actual and remaining duration.

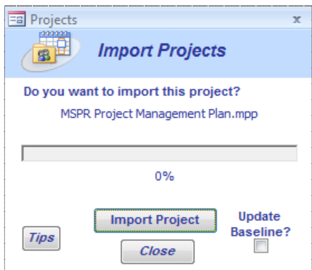
Note: Project tracks three sets of dates: current, baseline, and actual. When you first set the baseline, current = baseline. When a task is 100% complete, current = actual. Baseline, current, and actual values exist for start date, finish date, duration, cost, and work.

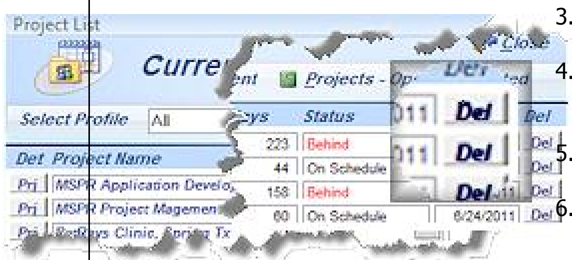
Communicate Project Information

1. **Format a view for printing:** On the **Format** menu, click **Text Styles** and **Bar Styles** to set up styles that will apply to multiple tasks. Or, on the **Format** menu, click **Font** and **Bar** to format individual elements for a specific task. Click **Timescale**, **Gridlines**, or **Layout** on the **Format** menu to change those aspects of the current view.
2. **Print a view as a report:** Set up the current view the way that you want it to look when printed. On the **File** menu, click **Print Preview** to check the view layout. When ready, click **Print**.
3. **Generate a report:** On the **View** menu, click **Reports**. Double-click a report category, and then double-click the predefined report. Enter any requested information. A preview of the report appears. To print the report, click **Print**.
4. **Add a field (column) to a table:** Click anywhere in a column to the left of where you want to insert a new column. On the **Insert** menu, click **Column**. In the **Field name** box, click the name of the field that you want to add as a new column.
5. **Customize views:** On the **View** menu, click **More Views**. Click **New** or **Edit**. In the **View Definition** dialog box, specify the table, group, and filter that you want to use to define the view.
6. **Customize tables:** On the **View** menu, point to **Table**, and then click **More Tables**. Click **New** or **Edit**. In the **Table Definition** dialog box, specify the information that you want to include in the table.
7. **Customize groups:** On the **Project** menu, point to **Group by**, and then click **More Groups**. Click **New** or **Edit**. In the **Group Definition** dialog box, specify how you want to group project information.
8. **Customize filters:** On the **Project** menu, point to **Filtered for**, and then click **More Filters**. Click **New** or **Edit**. In the **Filter Definition** dialog box, specify how you want to filter project information.

The **Closing** stage includes final details for completing a project. Resolve any final project details, and obtain customer acceptance of final deliverables. Conduct a Lessons Learned session, recording information about areas for improvement and best practices. Make any final updates to the project plan. Finally, archive the project plan according to your organization's project data archival guidelines.







Import Project

1. **On the Ribbon –** Select the Import button. A ñSelect a Projectò window will appear and find and select the project you wish to import. A window will appear, titled ***Import Projects***, to validate you want to import that project. If the project is correct, select Import Project.

   Please note there are rules to import projects. Please see "Tips" on the import window or in the provided documentation in the Introduction or Import Sections.

   a. To update a project, the project name *must* be the same as a project on file. If not, the project will be treated as a *New Project.*

   b. A project Summary Task (Task ID 0) is required for all imported projects. It is best to use the supplied template to create a project as it contains all the fields needed for MSPR including programming to choose a human asset and insert its data.

   c. A project will also be rejected if there are no assigned resources.

   d. You may choose to update baseline data by selecting *Update Baseline* on the window. A baseline is automatically created when a new project is first imported.
2. Upon completion of the import, the window will close and the Project Dashboard will appear. If the imported project does not display, select the *Refresh* button.
3. If you choose to not import the project, select Close and the import will be ended.
4. All original data for a project, e.g. Owner, Issues, Changes, Risks, Business Alignment data, etc., is retained for a project that is imported as an update. The import of updated Microsoft Project data will update summary and detail duration, status, start and due dates, notes, resources, summary tasks and milestone tasks.

Deleting a Project

1. A project may be deleted from MSPR by using the *Project List* window by selecting the *Projects* button *(in the Application Forms group – not the Dashboard group).* For example, you may want to delete the MSPR Project Management Plan project, delivered with MSPR, from the list of projects. You may also delete any project you want.
2. The Project List window displays a ***Del*** button to the right of each listed project. Selecting this button will start the process of deleting the project. There will be several messages to verify that you choose to delete the project along the process.
3. You may want to retain hold, completed or open projects as they will be displayed on the *Project List – Completed/Hold* report. They will not, however, be displayed on the *Project List* or the *Projects Dashboard.*
4. You may display hold, completed or open projects by selecting the *Projects – Open/Completed* button on the *Project List* window. Any function that can be performed on the *Project List* window can also be performed on the *Project List – Open/Complete* window.
5. The status of a project can be changed, *e.g. from Open or Hold to Scheduled,* on the *Project Details* window by selecting the Detail button (***Prj***) on the *Project List* or *Project List – Open/Complete* windows.
6. Also by selecting the *Project Name* on either window, the individual Project Dashboard will be displayed for that project.