Advanced Techniques in Microsoft Project

NK Shrivastava, **PMP, RMP, ACP, CSM**
CEO/Consultant - RefineM

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Agenda

1. Your expectations
2. About Me
3. Advanced Techniques in Microsoft Project
   - ✓ **Technique 1-Using and Formatting the Timeline**
   - ✓ **Technique 2-Managing Multiple Projects**
   - ✓ **Technique 3-Managing a Common Resource Pool**
   - ✓ **Technique 4-Using Task Inspector**
   - ✓ **Technique 5-Creating Reports**
   - ✓ **Technique 6-Customizing Views**
4. Upcoming trainings/workshops
5. How to claim 1 PDU for this webinar
6. Q & A

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RefineM's Virtual Lunch & Learn

This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.

It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.

The monthly webinars will cover a variety of Project Management/ Agile topics.

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About You

* What are your expectations from this webinar?

* Which version of MS Project do you use? 2007, 2010 or 2013?

* What is your topmost challenge in using MS Project?

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Helping organizations turn their project management capability into a *competitive advantage*

My professional journey b/f RefineM

* CEO/Consultant since Dec 2011
  * Agile Coaching/Adoption
  * Project Management/ Process Improvement Consulting and Training
  * Project Management Toolkits (for PMs, Executives and Agile Practitioners)
* Board Member – SWMO PMI Chapter

* 20+ years of Successful Project Leadership
  * Led 100s of projects of all sizes, successfully
  * Recovered many projects, saved millions of $
  * Implemented numerous process improvements
  * Coached/mentored 100s of PMs, and some executives

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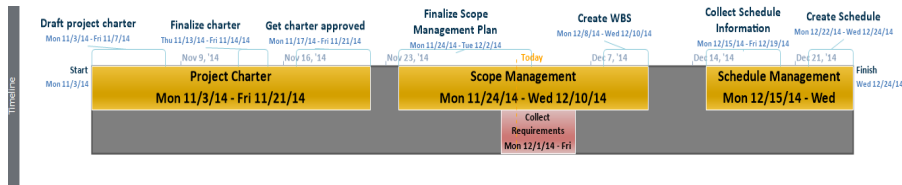
Technique #1:
Using and Formatting the Timeline

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What is the Timeline?

* The Timeline shows the high-level project progress.
* Did you know you can format this?
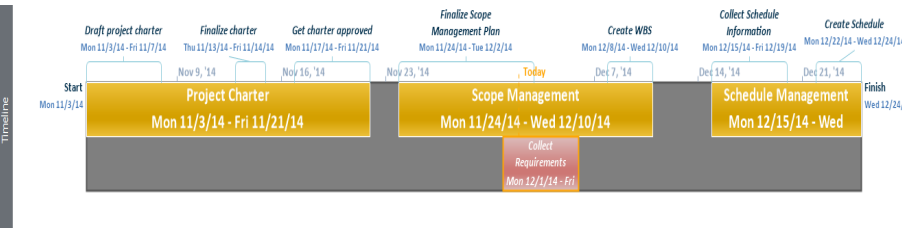 - ✓ And share it with other applications?

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Formatting the Timeline

* From Timeline Tools Format menu, you can:
  - ✓ Change fonts
  - ✓ Change fill color
  - ✓ Define text styles (italics, bold, font) for whole timeline
  - ✓ Change a task from a bar to a callout ("Display As Callout")

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Exporting Options

* On Timeline Tools, Format, Copy Timeline
* For E-Mail: sends it to Outlook
* For Presentation: sends it to PowerPoint
* Full Size: Copies to clipboard

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Technique #2:
Managing Multiple Projects

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Projects and Subprojects

* Did you know you could define subprojects under a master project?

    1. Select where you would like the subproject
    2. In Project tab, click Subproject and select an MPP file

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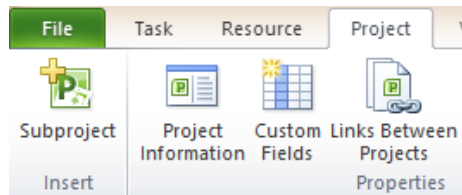
Before Subproject

	ⓘ	Task Name	Duration	Start	Finish	Predecessor	Resource Names
0		⊟ **Furnishing the office**	**8.75 days**	**Mon 6/3/13**	**Thu 6/13/13**		
1		⊟ **Air Conditioning**	**4.5 days**	**Mon 6/3/13**	**Fri 6/7/13**		
2	ⵊ	Install ducting	1.5 days	Mon 6/3/13	Tue 6/4/13		AC Installer[300%],Richard
3	ⵊ	Install vents	2 days	Tue 6/4/13	Thu 6/6/13	2	AC Installer[300%],Richard
4	ⵊ	Install main unit	2 days	Mon 6/3/13	Wed 6/5/13		AC Installer[200%],Richard
5		Install thermometers and controls	1 day	Thu 6/6/13	Fri 6/7/13	3,4	AC Installer,Richard
6		⊟ **Electrical**	**5.5 days**	**Mon 6/3/13**	**Mon 6/10/13**		
7		Install new fuse box	0.5 days	Mon 6/3/13	Mon 6/3/13		Electrician
8		Upgrade wiring	3 days	Mon 6/3/13	Thu 6/6/13	7	Electrician
9		Install new switches and ou	1 day	Thu 6/6/13	Fri 6/7/13	8	Electrician
10		Electrical Inspection	0.5 days	Fri 6/7/13	Fri 6/7/13	9	Electrician,Inspector,Richard
11		Connect air conditioning	2 hrs	Mon 6/10/13	Mon 6/10/13	4,8,10	Electrician
12		Install smoke detectors	0.5 days	Mon 6/10/13	Mon 6/10/13	8,10	Electrician

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After Inserting Subproject

	ⓘ	Task Name	Duration	Start	Finish	Predecessor	Resource Names
0		⊟ **Furnishing the office**	**8.75 days**	**Mon 6/3/13**	**Thu 6/13/13**		
1	📄	⊞ **Phase 1**	**5 days**	**Mon 6/3/13**	**Fri 6/7/13**		
2		⊟ **Air Conditioning**	**4.5 days**	**Mon 6/3/13**	**Fri 6/7/13**		
3	🔴	Install ducting	1.5 days	Mon 6/3/13	Tue 6/4/13		AC Installer[300%],Richard
4	🔴	Install vents	2 days	Tue 6/4/13	Thu 6/6/13	3	AC Installer[300%],Richard
5	🔴	Install main unit	2 days	Mon 6/3/13	Wed 6/5/13		AC Installer[200%],Richard
6		Install thermometers and controls	1 day	Thu 6/6/13	Fri 6/7/13	4,5	AC Installer,Richard
7		⊟ **Electrical**	**5.5 days**	**Mon 6/3/13**	**Mon 6/10/13**		
8		Install new fuse box	0.5 days	Mon 6/3/13	Mon 6/3/13		Electrician
9		Upgrade wiring	3 days	Mon 6/3/13	Thu 6/6/13	8	Electrician
10		Install new switches and ou	1 day	Thu 6/6/13	Fri 6/7/13	9	Electrician
11		Electrical Inspection	0.5 days	Fri 6/7/13	Fri 6/7/13	10	Electrician,Inspector,Richard
12		Connect air conditioning	2 hrs	Mon 6/10/13	Mon 6/10/13	5,9,11	Electrician

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Expanded Subproject

	ⓘ	Task Name	Duration	Start	Finish	Predecessor	Resource Names
0		⊟ **Furnishing the office**	**8.75 days**	**Mon 6/3/13**	**Thu 6/13/13**		
1	📄	⊟ **Phase 1**	**5 days**	**Mon 6/3/13**	**Fri 6/7/13**		
1		⊟ **Plan**	**3 days**	**Mon 6/3/13**	**Wed 6/5/13**		
2	📅	Determine budget	1 day	Mon 6/3/13	Mon 6/3/13		Kathy Sinclair
3		Prepare plan	1 day	Tue 6/4/13	Tue 6/4/13	2	Richard
4		Estimate costs	1 day	Wed 6/5/13	Wed 6/5/13	3	Richard
5		⊟ **Purchase materials**	**2 days**	**Thu 6/6/13**	**Fri 6/7/13**		
6		Rent tools and equipment	1 day	Thu 6/6/13	Thu 6/6/13	4	Richard's Secretary
7		Buy materials	1 day	Fri 6/7/13	Fri 6/7/13	6	Richard's Secretary
2		⊟ **Air Conditioning**	**4.5 days**	**Mon 6/3/13**	**Fri 6/7/13**		
3	🔴	Install ducting	1.5 days	Mon 6/3/13	Tue 6/4/13		AC Installer[300%],Richard
4	🔴	Install vents	2 days	Tue 6/4/13	Thu 6/6/13	3	AC Installer[300%],Richard
5	🔴	Install main unit	2 days	Mon 6/3/13	Wed 6/5/13		AC Installer[200%],Richard
6		Install thermometers and controls	1 day	Thu 6/6/13	Fri 6/7/13	4,5	AC Installer,Richard

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Two Subprojects – Date Changes

		Task Name	Duration	Start	Finish	Predecessor	Resource Names
0		− Furnishing the office	128.5 days	Mon 6/3/13	Thu 11/28/13		
1		+ Build a new office	128.5 days	Mon 6/3/13	Thu 11/28/13		
2		+ Phase 1	5 days	Mon 6/3/13	Fri 6/7/13		
3		− Air Conditioning	4.5 days	Mon 6/3/13	Fri 6/7/13		
4		Install ducting	1.5 days	Mon 6/3/13	Tue 6/4/13		AC Installer[300%],Richard
5		Install vents	2 days	Tue 6/4/13	Thu 6/6/13	4	AC Installer[300%],Richard
6		Install main unit	2 days	Mon 6/3/13	Wed 6/5/13		AC Installer[200%],Richard
7		Install thermometers and controls	1 day	Thu 6/6/13	Fri 6/7/13	5,6	AC Installer,Richard

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Technique #3:
Managing a Common Resource Pool

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Resources and Subprojects

* Did you know you could share resources among your projects? There are several ways:
  - ✓ Share a pool in a master project
  - ✓ Create a "dummy" project just for the resource pool

File	Task	Resource	Project

Team Planner ▾ | Assign Resources | Resource Pool ▾ | Substitute Resources

View | Assignments

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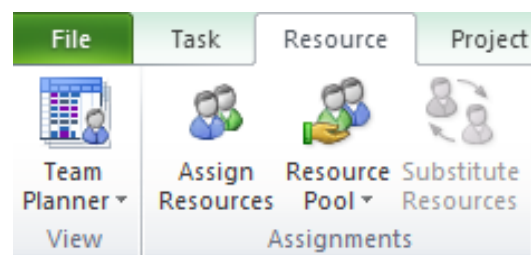
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Sharing Resources

* First, define a resource pool in a project

  - ✓ Assign resources to the "Resource Name" tab

  - ✓ Fill in information about their availability

* Under Resource Pool, select "Share Resources" and "Use Resources From" selecting an MPP file

Share Resources

Resources for 'My Project 1'
- ○ Use own resources
- ● Use resources (requires at least one open resource pool)
  - From: Furnish office ⌄

On conflict with calendar or resource information
- ● Pool takes precedence
- ○ Sharer takes precedence

Help | OK | Cancel

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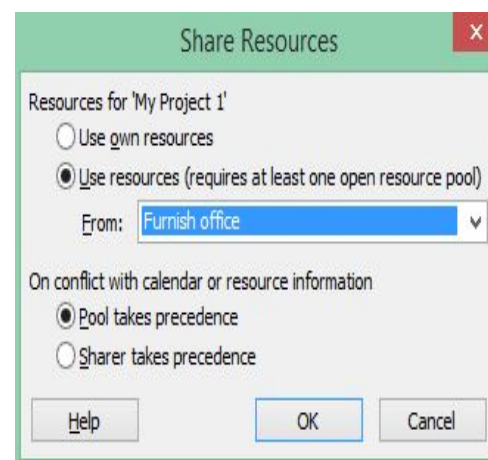
Managing Conflicts

* Use "Pool Takes precedence" if working with other projects/PMs
  - ✓ That way, pool resolves conflicts and PMs don't overwrite each other

* If you are the only PM using the resource pool, you can use "Sharer takes precedence"

Share Resources

Resources for 'My Project 1'

- ○ Use own resources
- ● Use resources (requires at least one open resource pool)
  - From: Furnish office

On conflict with calendar or resource information
- ● Pool takes precedence
- ○ Sharer takes precedence

Help | OK | Cancel

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Resource Sheet – Furnish Office

	(i)	Resource Name	Type	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar
1		Pat Leary	Work	PL	Admin	100%	$25.00/hr	$30.00/hr	$0.00	Prorated	Standard
2		Contract laborers	Work	C	Contract labor	500%	$25.00/hr	$28.00/hr	$0.00	Prorated	Standard
3		Architect	Work	A	External	100%	$200.00/hr	$0.00/hr	$0.00	Prorated	Standard
4		Joe Simmons	Work	JS	External	100%	$40.00/hr	$50.00/hr	$0.00	Prorated	Standard
5		Ann Salinski	Work	AS	Labor	100%	$40.00/hr	$50.00/hr	$0.00	Prorated	Standard
6		Curt Allen	Work	CA	Labor	100%	$40.00/hr	$50.00/hr	$0.00	Prorated	Standard
7		David James	Work	DJ	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard
8		Jerry Davis	Work	JD	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard
9		Laurie Macurthy	Work	LM	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard
10		Tim Walson	Work	TW	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard
11		Kathy Sinclair	Work	KS	Admin	100%	$62,400.00/yr	$0.00/hr	$0.00	Prorated	Standard
12		Fred Little	Work	FL	Labor	100%	$50.00/hr	$55.00/hr	$0.00	Prorated	Standard
13		Peter Jones	Work	PJ	Labor	100%	$50.00/hr	$55.00/hr	$0.00	Prorated	Standard
14		Susan Gianni	Work	SG	Labor	100%	$50.00/hr	$55.00/hr	$0.00	Prorated	Standard
15		Jim Madden	Work	JM	Specialist	100%	$70.00/hr	$70.00/hr	$0.00	Prorated	Standard

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Resource Sheet – Phase1

	ⓘ	Resource Name ▼	Type ▼	Material ▼	Initials ▼	Group ▼	Max. ▼	Std. Rate ▼	Ovt. Rate ▼	Cost/Use ▼	Accrue ▼	Base ▼
1	◈	**AC Installer**	**Work**		**A**		**100%**	**$70.00/hr**	**$0.00/hr**	**$0.00**	**Prorated**	**Standard**
2		Electrician	Work		E		100%	$80.00/hr	$0.00/hr	$0.00	Prorated	Standard
3		Inspector	Work		I		100%	$100.00/hr	$0.00/hr	$0.00	Prorated	Standard
4		Richard	Work		R		100%	$65.00/hr	$0.00/hr	$0.00	Prorated	Standard
5		Plumber	Work		P		100%	$80.00/hr	$0.00/hr	$0.00	Prorated	Standard
6		Telecom. Engineer	Work		T		100%	$70.00/hr	$0.00/hr	$0.00	Prorated	Standard
7		Richard's Secretary	Work		R		100%	$25.00/hr	$0.00/hr	$0.00	Prorated	Standard
8		Interior Designer	Work		I		100%	$50.00/hr	$0.00/hr	$0.00	Prorated	Standard
9		Mover	Work		M		100%	$30.00/hr	$0.00/hr	$0.00	Prorated	Standard
10		Kathy Sinclair	Work		K		100%	$62,400.00/yr	$0.00/hr	$0.00	Prorated	Standard

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Shared Resource Pool

	ⓘ	Resource Name ▼	Type ▼	Initials ▼	Group ▼	Max. ▼	Std. Rate ▼	Ovt. Rate ▼	Cost/Use ▼	Accrue ▼	Base ▼	Project ▼
7		Richard's Secretary	Work	R		100%	$25.00/hr	$0.00/hr	$0.00	Prorated	Standard	Furnish office
8		Interior Designer	Work	I		100%	$50.00/hr	$0.00/hr	$0.00	Prorated	Standard	Furnish office
9		Mover	Work	M		100%	$30.00/hr	$0.00/hr	$0.00	Prorated	Standard	Furnish office
10		Kathy Sinclair	Work	K		100%	$62,400.00/yr	$0.00/hr	$0.00	Prorated	Standard	Furnish office
11		Pat Leary	Work	PL	Admin	100%	$25.00/hr	$30.00/hr	$0.00	Prorated	Standard	Furnish office
12		Contract laborers	Work	C	Contract labor	500%	$25.00/hr	$28.00/hr	$0.00	Prorated	Standard	Furnish office
13		Architect	Work	A	External	100%	$200.00/hr	$0.00/hr	$0.00	Prorated	Standard	Furnish office
14		Joe Simmons	Work	JS	External	100%	$40.00/hr	$50.00/hr	$0.00	Prorated	Standard	Furnish office
15		Ann Salinski	Work	AS	Labor	100%	$40.00/hr	$50.00/hr	$0.00	Prorated	Standard	Furnish office
16		Curt Allen	Work	CA	Labor	100%	$40.00/hr	$50.00/hr	$0.00	Prorated	Standard	Furnish office
17		David James	Work	DJ	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard	Furnish office
18		Jerry Davis	Work	JD	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard	Furnish office
19		Laurie Macurthy	Work	LM	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard	Furnish office
20		Tim Walson	Work	TW	Labor	100%	$34.00/hr	$40.00/hr	$0.00	Prorated	Standard	Furnish office
21		Fred Little	Work	FL	Labor	100%	$50.00/hr	$55.00/hr	$0.00	Prorated	Standard	Furnish office
22		Peter Jones	Work	PJ	Labor	100%	$50.00/hr	$55.00/hr	$0.00	Prorated	Standard	Furnish office
23		Susan Gianni	Work	SG	Labor	100%	$50.00/hr	$55.00/hr	$0.00	Prorated	Standard	Furnish office
24		Jim Madden	Work	JM	Specialist	100%	$70.00/hr	$70.00/hr	$0.00	Prorated	Standard	Furnish office
1		Kathy Sinclair	Work	K		100%	$65.00/hr	$0.00/hr	$0.00	Prorated	Standard	Phase 1
2		Richard	Work	R		100%	$65.00/hr	$0.00/hr	$0.00	Prorated	Standard	Phase 1
3		Richard's Secretary	Work	R		100%	$25.00/hr	$0.00/hr	$0.00	Prorated	Standard	Phase 1

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Technique #4:
Using Task Inspector
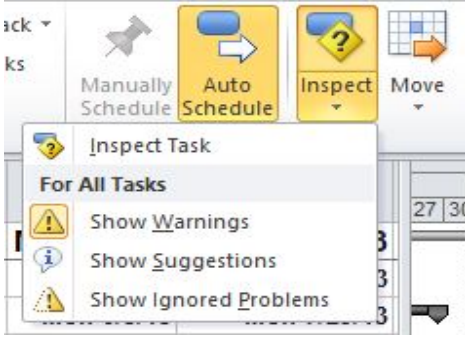
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Task Inspector?

* A tool to see what tasks are driving a completion date
* Useful tool to fix issues on a big project/multiple projects
* *Select a task*
* *Select Inspect from the Tasks Ribbon of Task menu.*
* *Select Inspect Task*

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Right-Clicking on Red Icon

Task Inspector View

Result of Rescheduling

Task Inspector

26 - Erect external walls

Factors Affecting Task:

Auto Scheduled

Start: Fri 9/27/13
Finish: Mon 10/7/13

Leveling Delay: 7.08ed

Predecessor Tasks:

Name	Type	Lag
25 - Erect steel frame	Finish To Start	0d

#		Task Name	Duration	Remaining Duration	Start	Finish
0		**Build a new office**	**133.75 days**	**89.24 days**	**Mon 6/3/13**	**Thu 12/5/13**
1	↻	Review meeting	90.25 days	90.25 days	Fri 6/28/13	Fri 11/1/13
7	✓	Pre-construction	40.5 days	0 days	Mon 6/3/13	Mon 7/29/13
8	✓	Get approvals	2 wks	0 wks	Mon 6/3/13	Fri 6/14/13
9	✓	Select architect	3 wks	0 wks	Tue 6/4/13	Mon 6/24/13
10	✓	Draw plans	2.4 wks	0 wks	Tue 6/25/13	Wed 7/10/13
11	✓	Review blueprints	8 days	0 days	Thu 7/11/13	Mon 7/22/13
12	✓	Select materials	4 days	0 days	Fri 7/19/13	Thu 7/25/13
13	✓	Order materials	0.75 days	0 days	Thu 7/25/13	Fri 7/26/13
14	✓	Building permit	0 days	0 days	Mon 7/29/13	Mon 7/29/13
15		Foundation	28.5 days	28.5 days	Tue 8/6/13	Fri 9/13/13
16		Survey and stake	4 days	4 days	Tue 8/6/13	Mon 8/12/13
17		Excavate for foundation	5 days	5 days	Mon 8/12/13	Mon 8/19/13
18		Footings	4 days	4 days	Mon 8/19/13	Fri 8/23/13
19		Install drainage	3 days	3 days	Fri 8/23/13	Wed 8/28/13
20		Install external utilities	4.5 days	4.5 days	Wed 8/28/13	Tue 9/3/13
21		Foundation walls	4 days	4 days	Wed 9/4/13	Mon 9/9/13
22		Lay slab foundation	2 days	2 days	Tue 9/10/13	Wed 9/11/13
23		Backfill	2 days	2 days	Thu 9/12/13	Fri 9/13/13
24		**External work**	**22.25 days**	**22.25 days**	**Mon 9/16/13**	**Wed 10/16/13**
25		Erect steel frame	4 days	4 days	Mon 9/16/13	Thu 9/19/13
26		Erect external walls	6 days	6 days	Fri 9/27/13	Mon 10/7/13

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Technique #5:
Creating Reports

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Reports

* Performance Reporting is a key role of the project manager

* Create Visual and regular reports from Project Report tab

* Export to PDF, Excel, or Visio

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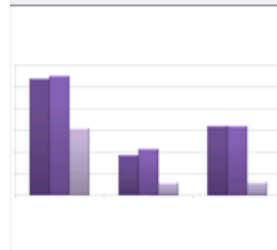
Types of Reports

* Overview (Summaries, Milestones, Critical Tasks)
* Current (In-Progress, Completed, Slipping)
* Costs (Cash Flow, Budget, Earned Value)
* Assignments (Who Does What, To-Do, Overallocated)
* Workload (Task Usage, Resource Usage)
* Custom (large variety of options)

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Project Summary

Build a new office
Outlander Spices
Kathy Sinclair
as of Tue 12/2/14

Dates

Start:	Mon 6/3/13	Finish:	Wed 11/27/13
Baseline Start:	Mon 6/3/13	Baseline Finish:	Wed 11/27/13
Actual Start:	Mon 6/3/13	Actual Finish:	NA
Start Variance:	0 days	Finish Variance:	0 days

Duration

Scheduled:	127.75 days	Remaining:	84.37 days
Baseline:	127.75 days	Actual:	43.38 days
Variance:	0 days	Percent Complete:	34%

Work

Scheduled:	2,724 hrs	Remaining:	2,398 hrs
Baseline:	2,724 hrs	Actual:	326 hrs
Variance:	0 hrs	Percent Complete:	12%

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Un-Started Tasks

Unstarted Tasks as of Tue 12/2/14
Build a new office
Kathy Sinclair

ID	Indicators	Task Name	Duration	Remaining Duration
16		Survey and stake	4 days	4 days

ID	Resource Name	Units	Work	Delay	Start	Finish
7	Curt Allen	100%	32 hrs	0 days	Tue 8/6/13	Fri 8/9/13

ID	Indicators	Task Name	Duration	Remaining Duration
17		Excavate for foundation	2.5 days	2.5 days

ID	Resource Name	Units	Work	Delay	Start	Finish
2	Contract laborers	100%	20 hrs	0 days	Mon 8/12/13	Wed 8/14/13
4	Joe Simmons	100%	20 hrs	0 days	Mon 8/12/13	Wed 8/14/13
5	Backhoe	100%	20 hrs	0 days	Mon 8/12/13	Wed 8/14/13
15	Fred Little	100%	20 hrs	0 days	Mon 8/12/13	Wed 8/14/13

ID	Indicators	Task Name	Duration	Remaining Duration
18		Footings	4 days	4 days
19		Install drainage	2 days	2 days

ID	Resource Name	Units	Work	Delay	Start	Finish
4	Joe Simmons	100%	24 hrs	0 days	Tue 8/20/13	Thu 8/22/13

ID	Indicators	Task Name	Duration	Remaining Duration
20		Install external utilities	5 days	5 days

ID	Resource Name	Units	Work	Delay	Start	Finish
6	Ann Salinski	100%	36 hrs	0 days	Thu 8/22/13	Wed 8/28/13
7	Curt Allen	100%	36 hrs	0 days	Thu 8/22/13	Wed 8/28/13
15	Fred Little	100%	36 hrs	4 hrs	Fri 8/23/13	Thu 8/29/13
16	Peter Jones	100%	36 hrs	0 days	Thu 8/22/13	Wed 8/28/13
17	Susan Gianni	100%	36 hrs	0 days	Thu 8/22/13	Wed 8/28/13

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Earned Value

Earned Value as of Tue 12/2/14
Build a new office
Kathy Sinclair

ID	Task Name	Planned Value - PV (BCWS)	Earned Value - EV (BCWP)	AC (ACWP)	SV	CV
8	Get approvals	$1,200.00	$1,200.00	$1,200.00	$0.00	$0
9	Select architect	$720.00	$720.00	$720.00	$0.00	$0
10	Draw plans	$60,000.00	$60,000.00	$60,000.00	$0.00	$0
11	Review blueprints	$1,680.00	$1,680.00	$1,680.00	$0.00	$0
12	Select materials	$960.00	$960.00	$960.00	$0.00	$0
13	Order materials	$90.00	$90.00	$90.00	$0.00	$0
14	Building permit	$0.00	$0.00	$0.00	$0.00	$0
16	Survey and stake	$480.00	$0.00	$0.00	($480.00)	$0
17	Excavate for foundation	$1,052.00	$0.00	$0.00	($1,052.00)	$0
18	Footings	$0.00	$0.00	$0.00	$0.00	$0
19	Install drainage	$0.00	$0.00	$0.00	$0.00	$0
20	Install external utilities	$0.00	$0.00	$0.00	$0.00	$0
21	Foundation walls	$0.00	$0.00	$0.00	$0.00	$0
22	Lay slab foundation	$0.00	$0.00	$0.00	$0.00	$0
23	Backfill	$0.00	$0.00	$0.00	$0.00	$0
25	Erect steel frame	$0.00	$0.00	$0.00	$0.00	$0
26	Erect external walls	$0.00	$0.00	$0.00	$0.00	$0
27	Install windows, external doors	$0.00	$0.00	$0.00	$0.00	$0
28	Install siding	$0.00	$0.00	$0.00	$0.00	$0
29	Install roof	$0.00	$0.00	$0.00	$0.00	$0
31	Frame internal walls	$0.00	$0.00	$0.00	$0.00	$0
33	Distribute heating, cooling	$0.00	$0.00	$0.00	$0.00	$0

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Technique #6:
Customizing Views

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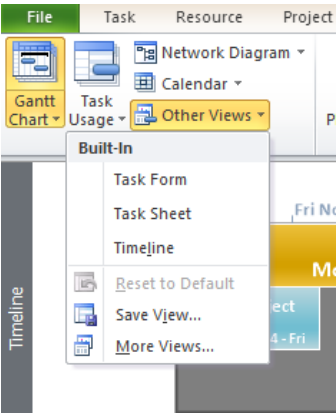
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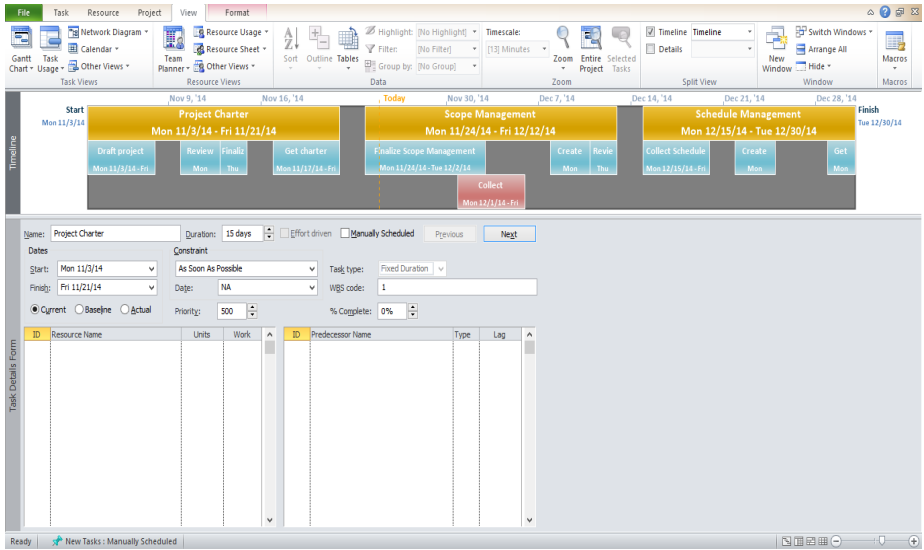
Customizing Views

* Great way to see project at a glance

* Select "New" from More Views

  ✓ Then Define New View, and select Combination View

* The Primary View appears at the top

* Details View at bottom

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Custom View – Example 1

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Custom View – Example 2

Custom View – Example 3

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Questions?

RefineM PROJECT MANAGEMENT CONSULTING

NK Shrivastava, MBA, PMP, RMP, ACP, CSM
CEO/Consultant, RefineM
Nixa, MO 65714, USA
nks@refinem.com, www.refinem.com
in http://www.linkedin.com/in/nkshrivastava   🐦 @justrightpm

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