

Ten Best Practices to Customize Project

Speaker: B Sai Prasad, PMP®, PMI-SP®, [Microsoft MVP Project](#)

Project Options

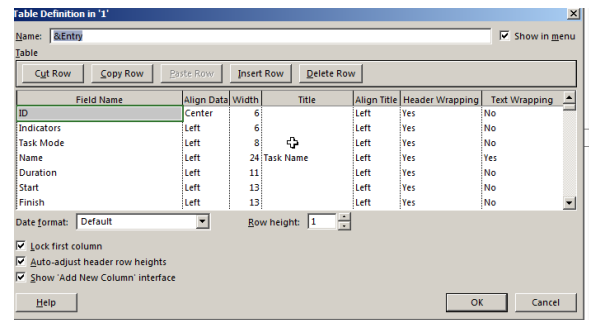
- By default, the initial hours per day is 8 in Project. You can change this definition in Project Options > Schedule ... Calendar options for this project:
- To show critical path for each independent network, check “Calculate multiple critical paths” Project Options > Advanced ... Calculation options for this project:
- You can tell Project to autolink pasted/insert/ moved tasks with its surround tasks. Check “Autolink inserted or moved tasks” option in Project Options > Schedule ... Scheduling options for this project:

Custom Fields

- Custom fields can be used to store/calculate any specific information to be displayed in the project.
- Project organizes the schedule as (a) task and timephased task fields, (b) resource and timephased resource fields, (c) assignment and timephased assignment fields
- You can customize nine types of task and resource related fields: Cost1 to Cost10, Date1 to Date10, Duration1 to Duration10, Finish1 to Finish10, Flag1 to Flag20, Number1 to Number20, Start1 to Start10, Text1 to Text30, Outline Code1 to Outline Code10
- Start1 – Start10 fields : ProjDateAdd([Finish],"3d","Standard") – Add three working days to the Finish date
- Duration1 – Duration10 fields : ProjDateDiff([Start],[Finish],"Standard") – Returns the minutes between Start and Finish
- Flag1 – Flag20 fields : Switch([Duration1]=0,No,[Duration1]>0,Yes) – Returns No if Duration1 is 0 minutes. Returns Yes if Duration1 is greater than 0 minutes

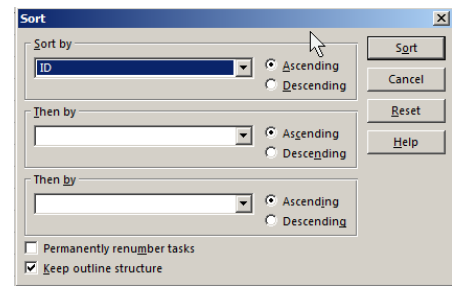
Custom Tables

- A table is a preset collection of related fields that you can choose to display depending on which view you are in
- Right click at the top left corner of a table, choose a table.
- To create your own table choose View tab > Data group > Tables command drop down ... More Tables. In More Tables, you can either create a new table or copy the existing table.
- You can order the columns, adjust its width, wrap the header and text, and lock the first column too



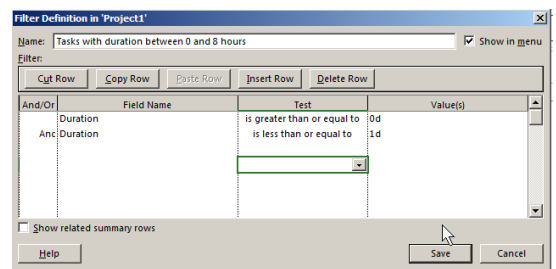
Sort Tasks and Resources

- On Gantt Chart view or any view with columns, you can click on the arrow on the right of the column heading to quick sorting.
- You can sort by multiple columns by choosing View tab > Data group > Sort command dropdown ... Sort By...
- Sort dialog gives you a way back to your project’s original outline structure if things get messed up.

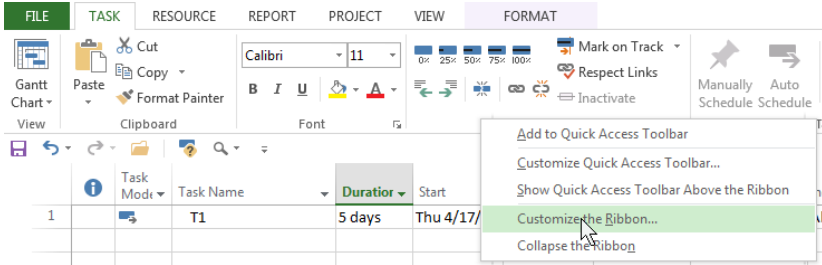


Filter Tasks and Resources

- Task filters applies to task; Resource filters for resources
- You can sort by multiple columns by choosing View tab > Data group > Filter: dropdown ...New Filter...
- Sort dialog gives you a way back to your project’s original outline structure if things get messed up.



Customize Ribbon



- Work with tabs
- Work with groups
- Work with commands
- Reset the ribbon
- Export a customized ribbon
- Import a customized ribbon

