Welcome to the Windows 95 Deployment Plan!

This Microsoft Project   template gives you a head start in setting up your deployment plans for Windows 95.   This template consists of a starter schedule of typical project tasks and specially-formatted views tailored for the Windows 95 deployment effort.

You can modify this template in a number of ways to better suit your particular environment.   It is based on the materials provided in the Windows 95 Resource Kit, and should be used as a supporting tool and in conjunction with the more detailed information included in that kit.

The Windows 95 Deployment Plan

You can learn more about how to start planning with this file by reading through the template's Cue Cards.   (You are reading them right now!)   Cue Cards will introduce you to the project's special views, and will guide you through modifying and saving this template as your own project plan.

Cue Cards will remain on top of your project plans as you work with them.   (If you are running Windows 95 and the Cue Cards do not remain on top, right-mouse click anywhere on the Cue Card and choose Keep Help on Top\On Top.)   If a Cue Card obstructs your view, you can re-size it by simply clicking and dragging the edge of the Cue Card, or you can minimize it by clicking on the minimize button in the card's upper-right-hand corner.

Getting An Overview of the Project

Top Level Overview

To quickly see the relationship between the key <u>phases</u> of the plan outlined in the Deployment Guide for Windows 95, click on the Top Level Overview tool. In this view you can quickly see the approximate duration and timing of each phase of the deployment plan.

Detailed Overview

Selecting the Detailed Overview tool expands the Top Level view to show additional details for each phase of the deployment.

Identifying Project Resources

Before assigning specific resources (people) to work on project tasks, you may want to inventory everyone who will be a part of the deployment team.

Resource List

• Select Resource List from the View menu.
• Enter the resource's Name, Initials, and Group.
• Enter resource cost rates, as applicable.
• If you are using resource types, such as Trainer, rather than individuals, such as Bob Smith, use the Max Units field to identify the maximum number of available resources for each type.

Creating a New Project

The <u>template</u> file provides the basic information you'll need to build a useful deployment schedule. To create your own project from this template, follow these steps:

File Open

▪ Click on the File Open tool.
▪ Find and select the **DEPLOY.MPT** file, then choose OK.

When the template is first opened, you will be prompted to enter summary information about your project.

▸ **What do you want to do?**

⟩ Read about project summary information.

⟩ Save the file as a new project.

Working With Task Details

Microsoft Project provides a flexible interface for viewing and editing your project detail. Some of the most common tasks are outlined below.

▶ What do you want to do?

▶ Examine task notes.

▶ View detail for a single phase of the project.

▶ Set a start date for the task.

Task Notes

In the Windows 95 Deployment Plan, task notes are used to provide additional details and information about individual tasks.

Attach Note

To view or modify a task note, do the following:

- From a task view, select the task you are interested in.
- Select the Attach Note tool from the toolbar.

This brings up the Task Information form with the Notes tab displayed. You can make changes to the task note directly in this form.

If the first column in a task table is locked (appears grey), a small indicator will appear next to tasks that have notes attached.

Hiding and Showing Phase Details

Top Level Overview

To examine details for particular phases of the project, do the following:

- Select the Top Level Overview tool on the toolbar to display only the phase summary tasks.
- Double-click on the Name of the phase for which you want to show details.
- Double-click again on the Name of the phase to hide the details.

Show All Tasks

You can also click on the Show All Tasks tool to show the detail for all phases in the project at once.

Project Template

A Microsoft Project file that lets you use an existing schedule as the starting point for creating new schedules. Project template files have a .MPT extension.

Phase

A project phase consists of a group of related tasks. In Microsoft Project, phases are represented by Summary tasks.

Assigning Project Resources

Microsoft Project makes it easy to assign resources to your tasks and to monitor their workload over the life of the project. The Windows 95 Deployment Template also allows you to assign responsibility for tasks in your plan.   This is useful for indicating managers who are reponsible for managing the work on the task, but who are not actually working on it themselves.

▶ **What do you want to do?**

> Assign resources to work on tasks.

> Assign overall responsibility for tasks.

Project Summary Information

The Summary Information dialog is used to enter information such as the project start date, and the project manager. The first time you open the project template, the Summary Info dialog will appear automatically. If you want to modify the summary information at any later time, just select Summary Information from the File menu.

While you are not required to enter information in any of these fields, in general you should at least enter:
- The start date of your project. This should be the start date of the earliest task.
- The name of your project manager.
- Any general comments that relate to the project as a whole.

Saving Your Project File

The first time you save your project file, you will be prompted to supply a file name. On subsequent saves, Microsoft Project will automatically save to the same file.

File Save

▪ Click on the File Save tool.
▪ Enter a new name for your project file.
▪ Choose OK.

Your project will be saved with a .MPP extension instead of the .MPT used by template files.

Resource Name

The name of a resource. Depending on how you intend to track your resources, this may be an individual's name, such as "Bob Smith", or the name of a resource type, such as "Trainer".

Resource Initials

The initials for a resource. Although you can enter up to 255 characters in this field, resource initials are generally used in views where space is limited, so you should keep text in this field to a minimum.

Resource Group

The group to which a resource belongs. This category can be used to filter on all tasks assigned to members of a particular group.

Resource Max Units

The maximum number of units of a resource that can be used at one time without the resource being overallocated. For individuals, this value should never be greater than 1. If you are using resource types in place of individuals, it may be greater than 1. For instance, you might have 3 Trainers available.

Constraining Start or Finish Dates

Microsoft Project will calculate Start and Finish dates for your tasks based on task relationships and your project Start date. You may want to force a Start or Finish date on a task. This is done by placing a Constraint on the task. Project provides 8 different types of constraints:

As Soon As Possible

As Late As Possible

Start No Earlier Than

Finish No Earlier Than

Start No Later Than

Finish No Later Than

Must Start On

Must Finish On

As Soon As Possible Constraint

The task will start as close to the project start date as possible.

As Late As Possible Constraint

The task will finish as close to the project finish date as possible.

Start No Earlier Than Constraint

The task will start no earlier than the Constraint Date entered. It may start later based on predecessor relationships.

Finish No Earlier Than Constraint

The task will finish no earlier than the Constraint Date entered. It may finish later based on predecessor relationships.

Start No Later Than Constraint

The task will start no later than the Constraint Date entered. It may start earlier based on predecessor relationships.

Finish No Later Than Constraint

The task will finish no later than the Constraint Date entered. It may finish earlier based on predecessor relationships.

Must Start On Constraint

The task will start on the Constraint Date entered, regardless of any predecessor relationships.

Must Finish On Constraint

The task will finish on the Constraint Date entered, regardless of any predecessor relationships.

Assigning Resources to Tasks

Use the Assign Resources form to assign your project resources to individual tasks.   This form will float on top of your current task view, allowing you to assign multiple resources without ever needing to re-open the form.

Assigning Task Responsibility

Microsoft Project allows you to assign overall responsibility for a task to an individual without actually assigning any work to them.   (You can still assign the work of the task to an individual resource.)   This is useful for indicating managers who are reponsible for managing the work on the task, but who are not actually working on it themselves.

Modifying the Deployment Plan

What do you want to do?

> Create a new project from the template.

> Look at an overview of the project plan.

> Examine and modify task details.

> Identify resources for the project.

> Assign resources to project tasks.

> Quit Cue Cards and work on my own.

Set Task Constraints

To place a constraint on a task, do this:
- Double-click on the task you wish to constrain to bring up the Task Information form.
- Select the Advanced tab.
- Choose a Constraint Type.
- Enter the Constraint Date.
- Choose OK.

Note that if you type a date directly in the Start field for a task, Project automatically places a Start No Earlier Than constraint on the task. If you enter a Finish date for the task, Project automatically places a Finish No Earlier Than constraint on the task.

Assigning Resources

To assign resources using this form, do this:

Assign Resources
- Switch to a view displaying your project tasks.
- Click on the Assign Resources tool.
- Select the resource(s) you wish to assign from the list.
- Select the task(s) you wish to assign the resource(s) to in the table portion of the view.
- Click on the Assign button.

For more information on using the Assign Resources form, open the form and choose the Help button.

Assigning Responsibility

To assign responsibilty for a task, do the following:

Assign Task Responsibility

- Select a view displaying your project tasks.
- Select the task(s) for which you wish to assign responsibility.
- Click on the Assign Task Responsibility tool.
- Enter the name of the person responsible for the selected task(s).
- Choose OK.

Note that the person responsible for a task does not have to be included in the project's resource list.

Good Luck!

Thank you for taking the time to explore the deployment plans for Windows 95.   If you would like to continue working with Microsoft Project and need additional assistance, you can:

● Use Microsoft Project's Built in Help and Cue Cards.
● Use the Windows 95 Deployment Plan Cue Cards.
● Log onto the Microsoft Network's Microsoft Project forum, and send your questions directly to an Expert.

To quit these Cue Cards, simply select Close from the control menu in the upper-left-hand corner.