



## Microsoft Project™ with Clarity PPM™ Tutorial Series

### Understanding Microsoft Project Task Types and Clarity PPM

Opening a Microsoft Project (MSP) project schedule that has been stored in a Clarity project repository, at first glance seems like a simple task. Continue to inspect the file with this first impression in place, and soon you will be surprised, very surprised.

“Surprised? What kind of surprises?” Well, when a project manager initially opens a project from Clarity into MSP, he or she may see that:

- The project finish date have slipped, or
- The total hours of work for the project, a phase, activity, or task have increased or decreased, or
- The task start date or finish date for one or more key tasks are earlier or later, or
- Tasks now are project milestones.

These are a few of the many changes that may appear when a project manager opens his or her project schedule from Clarity.

Digital Celerity's Best Practices Using MSP with Clarity training and mentor-coaching enables the CIO or PMO Director to minimize the effects of these risks to project data by focusing the project manager on the key task at hand: Re-aligning the project schedule with expectations without chasing answers to endless questions that typically ask some form of “Why did it do that?” And, in following the suggested alignment process the project manager will begin to gain more and more insight into just that question: “Why did it do that?”

See the bottom of the last page of this tutorial for more information on how Digital Celerity can support and assist you and your organization's project managers to use both Clarity and Microsoft Project more efficiently and effectively.

#### Overview

This article is a brief guide and tutorial to working with a Microsoft Project schedule that has been stored in the Clarity project data repository. The article contains a discussion of the Microsoft Project task attribute, Task Type.

There are three Task Types: Fixed Units, Fixed Duration and Fixed Work.

#### Fixed Units Task Type

When you assign a resource to a task, you specify the assignment units in the Units field of the Assign Resources dialog box. You can see the units in the chart portion of the Microsoft Project Gantt Chart view. By default, the units appear with the resource name next to the Gantt bar (except when the assignment units are 100 percent).



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The Fixed Units task type dictates that the percentage of assignment units on a task remain constant regardless of changes to duration or work. This, for many Microsoft Project users, is the default task type because it's the task type that fits most project tasks. If you increase task duration, Microsoft Project will not require that you to find another resource or force a 50% resource to work 100% in an assignment.

Changes to a Fixed Unit task create these results:

- If you revise the duration, work also changes, and units are fixed.
- If you revise work, duration also changes, and units are fixed.
- If you revise units, duration also changes, and work is fixed.

### Fixed Work Task Type

When you assign a resource to a task, the task's duration is translated into work. You can see the amount of work in the Task Usage or Resource Usage view.

The Fixed Work task type dictates that the amount of work on an assignment should remain constant regardless of changes to duration or units.

Changes to a Fixed Work task create these results:

- If you revise the duration, units also change, and work is fixed.
- If you revise units, duration also changes, and work is fixed.
- If you revise work, duration also changes, and units are fixed.

### Fixed Duration Task Type

When you create a task, you specify the task's duration in the Duration column of the Gantt Chart or other task sheet. In using the Gantt Chart view, a Gantt bar for the task is sized according to the duration that you established.

The Fixed Duration task type dictates that the task duration should remain constant, regardless of changes to units or work.

Changes to a Fixed Duration task create these results:

- If you revise units, work also changes, and duration is fixed.
- If you revise work, units also change, and duration is fixed.
- If you revise the duration, work also changes, and units are fixed.



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## Summary

Changes to a Fixed Units task create these results:

- Revise the duration, work also changes, and units are fixed.
- Revise work, duration also changes, and units are fixed.
- Revise units, duration also changes, and work is fixed.

Changes to a Fixed Work task create these results:

- Revise the duration, units also change, and work is fixed.
- Revise units, duration also changes, and work is fixed.
- Revise work, duration also changes, and units are fixed.

Changes to a Fixed Duration task create these results:

- Revise units, work also changes, and duration is fixed.
- Revise work, units also change, and duration is fixed.
- Revise the duration, work also changes, and units are fixed.

## A Few Implications

1. The project resource who charges more Work (hours) to a Fixed Work or Fixed Units task than the Remaining Work assigned to him will cause the task Finish Date to extend.
2. The Project Manager who increases the Work (hours) of a resource assigned to a Fixed Units task will cause the task Finish Date to extend.
3. The project resource who charges less Work (hours) than the Work assigned to him in the current period (timesheet) of a Fixed Units task will cause the task duration to reduce and change the task Finish Date to an earlier date.

For the Clarity customer who has invested but has yet to realize fully the power of Clarity, the MSP with Clarity

Mentor/Coaching Program is the training and knowledge transfer solution that ensures Program and Project Managers are doing the right things and doing those things right. Unlike training course-only knowledge transfer solutions, the MSP with Clarity Mentor/Coaching Program combines classroom training led by experienced professional project managers followed by a series of one-on-one mentor/coaching sessions facilitated by an experienced mentor coach in which PM principles along with MSP and Clarity techniques and tips are applied to real-world, enterprise projects.



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