

# The Riddle of the Ribbon, Moving to MS Project 2010 from a highly customized MS Project 2007, or Where is Everything?

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## Introduction

A caveat before we begin. I am not a Microsoft trainer versed in all the bells and whistles of the product. This is just to share my experience. Hopefully it will be of some value to the community.

The casual MS Project 2007 user may not be unduly stressed by the migration to Project 2010 as the degree of unfamiliarity may not be that different. In other words, if it's been a long time since you used 2007 you may not realize how different 2010 is. If on the other hand you are a project scheduler by profession it can be shocking. It's one of those "what were they thinking" moments. A product upgrade should mean you can use it like you did before while at your own pace become familiar with its enhancements. Well it has most, but not all of what it had before, but surrounded by so many options you need a translator to find what you're looking for. It's as if the designers were concerned that the user might not see all the features in the old pull down menus so they put them all on the screen so you can't miss them. It does have some additional nice-to-haves, and some additions I have no use for but you may find useful.

**First let's discuss installation.** If you support a portfolio of projects on the 2007 platform and give your clients access to their mpp files you cannot suddenly upgrade them to 2010. They will have to get the software and learn it. I have no clients like that. The ones I support on 2010 already have the product and ask me to work with that version. So we schedulers need to install and get familiar with 2010 quickly to maintain our practice. Suggest you do that before you encounter an upgrade requirement. Thus you will need to retain your 2007 version of the product and have it coexist with 2010. Be careful. The 2010 installation will wipe 2007 off your machine using the default installation option.

My client has an application installer that takes over the process when you click install. When the smoke cleared 2007 was gone. When I went to reinstall 2007 it was no longer listed on the installer list. I had to call their help desk to get it back. It took 3 days to get it reinstalled. If you're doing it on your own you should be able to avoid that problem.

**Starting the Product:** You can accept the icon on your desktop during installation but if you're like me with an uncluttered desktop you may elect the toolbar option. You can create a toolbar icon shortcut from the desktop icon and then get rid of it. You can always go to Start/Programs and see both programs in the Microsoft Office folder, and start the program from there, or create the toolbar shortcut from there. If you are in the habit of using Windows explorer to find and open a schedule you'll probably find that it opens the last version you installed. That's because the Explorer's Tools/Folder Options/File Types [Figure 1] is pointing to that version. You can change what Explorer points to but if you use both versions its better to create two toolbar shortcuts.

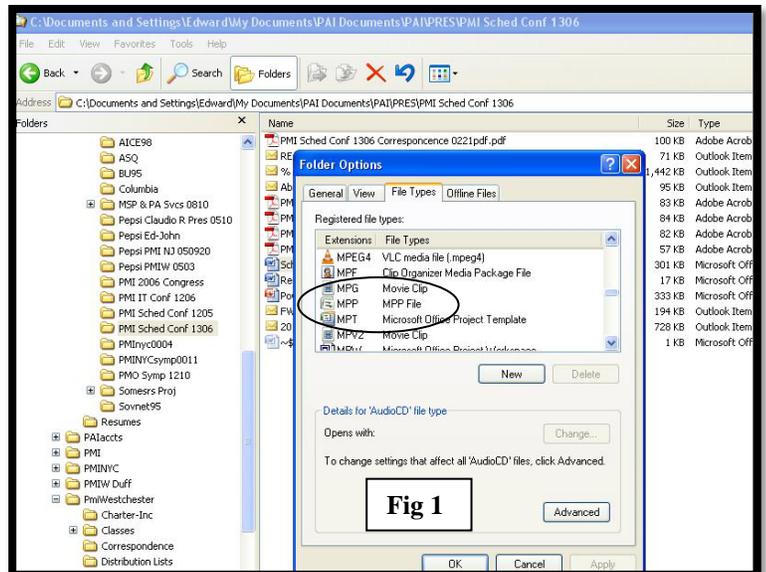
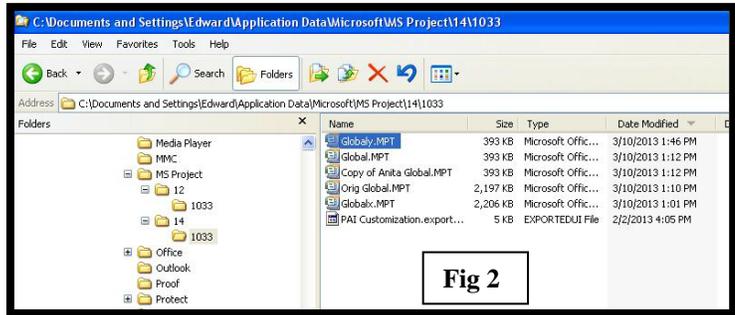


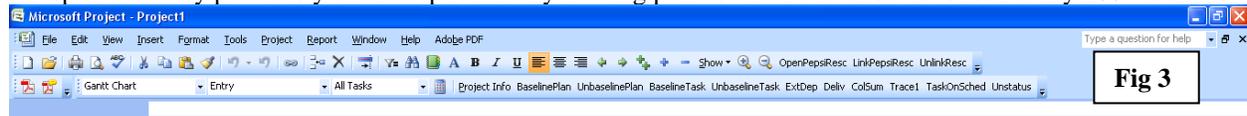
Fig 1

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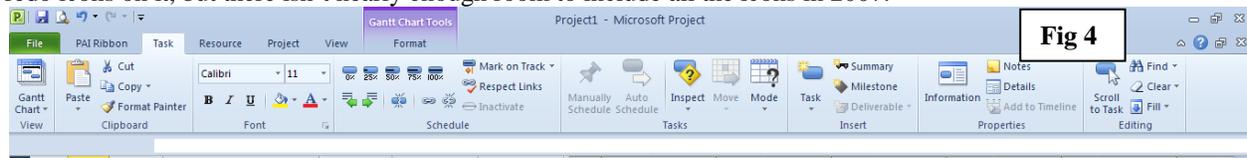
**Importing Your Stuff:** If you're an experienced scheduler you've got your own views, tables, filters, macros, and customized fields in addition to the ones Project provides. This information resides in the global.mpt file installed with the product. The installation process will ask if you want to import them from 2007 into the new version. Do it. You can install without importing and later replace the 2010 global.mpt file with the old 2007 global.mpt file but don't do that. I'll explain why in the ribbon topic. You will find the global.mpt files in C:\Documents and Settings\YourUserName\Application Data\Microsoft\MS Project\12\1033 for 2007 and 14\1033 for 2010, [Figure 2]. You'll notice I have a copy of the original 2010 mpt file, 393KB, on installation before importing. After importing my 2007 views, tables, filters, macros, and customized fields it's 2197KB and after some usage it's 2206KB. Notice when this was taken I was using the original 393KB version.



**The Ribbon:** This is the most controversial characteristic of Microsoft's 2010 Office product line and Project is no exception. For those not familiar they've replaced all those compact tool bar menus with headings they call ribbons that spell out every previously offered option in any heading pull down. To level set let's look at my 2007 toolbars



in Figure 3. Notice it's got 11 old Windows standard headings across the top, File, Edit, View.....etc. The next 2 lines I've customized to include what I access 90+% of the time. 2010 in Figure 4 gives you a heading across the top of 5 options, Task, Resources, Project, Views, and Format, but you literally have to build your own ribbon to accomplish the effect I have on the next 2 lines in 2007. That's the PAI Ribbon heading I'll show you later. There is a Quick Access toolbar at the very top of the screen in Figure 4 and I've got file save, print preview, undo and redo icons on it, but there isn't nearly enough room to include all the icons in 2007.



How many of these functions do you use? Can you figure out what they all do? There is the option to "minimize" the ribbon. It looks like Figure 5.

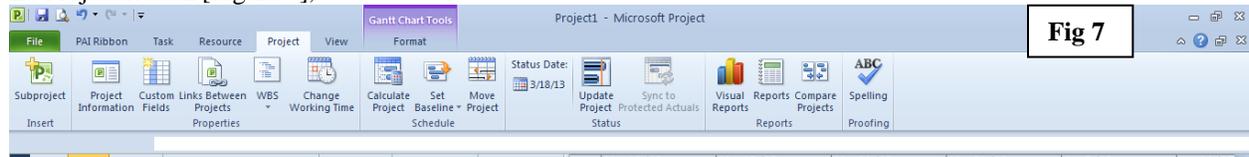


If you then click on the Task heading for example you get Figure 4. So if you want to maximize screen space for your schedule you "minimize" the ribbon but now it's an extra click to get to the icon you need, that is, if you can remember which of the 5 headings it in. Here is the Resource ribbon [Figure 6],

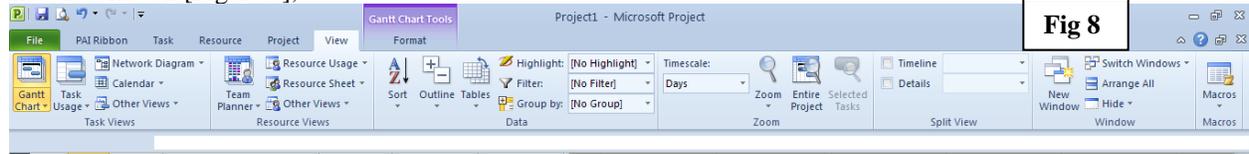


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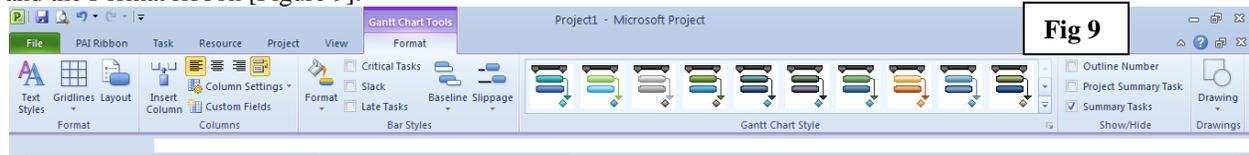
the Project ribbon [Figure 7],



the View ribbon [Figure 8],



and the Format ribbon [Figure 9].

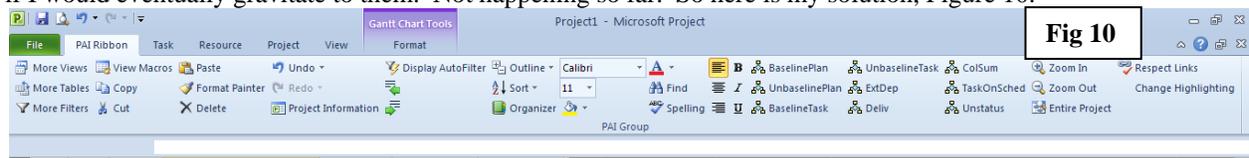


Now see if you can find the icons in my 2007 toolbars [Figure 3] on the 5 ribbons, Figures 4, 6, 7, 8, and 9.

One nice feature of 2010 is the customization capability of the ribbons. But even with that excellent flexibility some of the options I consider most important aren't even available. For example notice in Figure 3 on the bottom left I have 3 windows showing what view, table, and filter are active. When you click the pull down for each you get the full list of views, tables, or filters. Notice on the View ribbon Figure 8, there is a filter window, but it doesn't tell you what filter is active or give you a complete list of your filters when you click the pull down. There are no views, tables, or filter pull down windows available in 2010. Common icons like the Delete "X" icon isn't on any of the standard ribbons but you can find it in the customization options and place it somewhere. Tools/Options is now under the File menu and so is the Organizer (green rectangle between the binoculars and the A in Figure 3) which I use all the time, but at least that was available as a customization icon.

The other thing that is significantly missing is the ability to define a button and assign a macro to it. I have 14 macro buttons on the right end of my 2<sup>nd</sup> and 3<sup>rd</sup> toolbars. In 2007 you could give the button any text you wanted and assign a macro to it. In 2010 you can place a macro icon on your toolbar. The icons all look the same and the name of the macro accompanies it. If you run out of space on your ribbon the macro icon comes without its name and you have no idea what it does.

My solution was to create a whole new ribbon, the PAI Ribbon. I wanted to leave the standard ribbons intact to see if I would eventually gravitate to them. Not happening so far. So here is my solution, Figure 10.



With this ribbon I can do almost everything I do with 2007 without changing ribbons. Much of what's in here isn't even found on the 5 standard ribbons. My 2007 views, tables, and filters pull down windows are replaced on the left with More Views, More Tables, and More Filters, not as nice as in 2007 but at least I can find what I'm looking for. If you click on one of them it will tell you which view, table, or filter is active. Everything I used in 2007 is on this ribbon. Notice the 9 macros with their ugly icons.

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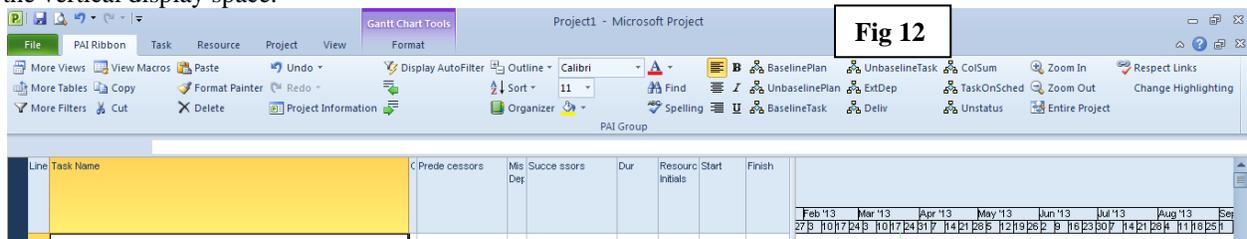
There is one drawback to creating my own ribbon. It's a 2010 "feature" or bug. When you reduce your screen to a window instead of full screen look what happens in Figure 11.



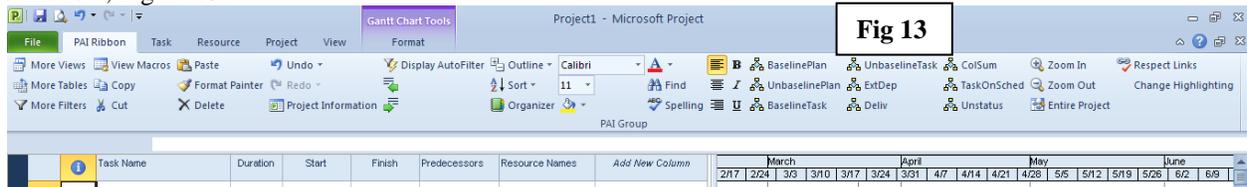
It also happens when I plug my laptop into a projector. It doesn't happen to the other ribbons.

Another interesting "feature" of 2010 is where they store the ribbon. It's not in the Global.mpt. It's stored in a separate file called MSProject.officeUI in the C:\Documents and Settings\USERENAME\Local Settings\Application Data\Microsoft\Office directory. Whenever you change your ribbon it will update that file. If you lend someone else your Global.mpt they will get your views, tables, filters, and macros but not your ribbon. The best way to share your ribbon is to go into the File/Options/Customize Ribbon function and click the Import/Export button at the bottom of the screen. Export will create a small file with the name you give it.exportedUI. You can see it bottom right in Figure 2 but you can put it wherever you want. Another user can import that file and use your ribbon.

**Headings:** Project 2010 has a characteristic that seems to be associated with views imported from 2007. Here's an example in Figure 12. The table headings are much wider than they need to be, the calendar could be on the same row, and the manual adjustment doesn't work. This phenomenon along with the wide ribbon takes up about 1/3 of the vertical display space.



On the other hand if you use a native 2010 view it looks like it should with the table headings and calendar on the same row, Figure 13.



**Text Wrapping:** This is a feature worth upgrading for. If you have large schedules with a mixture of long and short task descriptions you can spend hours resizing line heights to accommodate task descriptions. In Project 2010 right click on the Name column heading and click Wrap text. It doesn't always work the first time but it does work. It sometimes also works on columns you didn't click on, but you can override that.

**Summary:** Having adapted 2010 to my needs and identified and remediated the major issues I've grown to like 2010. It seems faster than 2007, has some additional features which I haven't described here, and in my view, is worth upgrading to.