

Project 2003

Manual - Foundation Level



SAMPLE

© 1995-2010 Cheltenham Courseware Pty. Ltd.

All trademarks acknowledged. E&OE.

No part of this document may be copied without written permission from Cheltenham Courseware unless produced under the terms of a courseware site license agreement with Cheltenham Courseware.

All reasonable precautions have been taken in the preparation of this document, including both technical and non-technical proofing. Cheltenham Courseware and all staff assume no responsibility for any errors or omissions. No warranties are made, expressed or implied with regard to these notes. Cheltenham Courseware shall not be responsible for any direct, incidental or consequential damages arising from the use of any material contained in this document. If you find any errors in these training modules, please inform Cheltenham Courseware. Whilst every effort is made to eradicate typing or technical mistakes, we apologise for any errors you may detect. All courses are updated on a regular basis, so your feedback is both valued by us and will help us to maintain the highest possible standards.

Sample versions of courseware from Cheltenham Courseware

(Normally supplied in Adobe Acrobat format): If the version of courseware that you are viewing is marked as NOT FOR TRAINING, SAMPLE, or similar, then it cannot be used as part of a training course, and is made available purely for content and style review. This is to give you the opportunity to preview our courseware, prior to making a purchasing decision. Sample versions may not be re-sold to a third party.

For current license information

This document may only be used under the terms of the license agreement from Cheltenham Courseware. Cheltenham Courseware reserves the right to alter the licensing conditions at any time, without prior notice. Please see the site license agreement available at: www.cheltenhamcourseware.com.au/agreement

Contact Information

Australia / Asia Pacific / Europe (ex. UK) / Rest of the World

Email: info@cheltenhamcourseware.com.au
Web: www.cheltenhamcourseware.com.au

USA / Canada

Email: info@cheltenhamcourseware.com
Web: www.cheltenhamcourseware.com

UK

Email: info@cctglobal.com
Web: www.cctglobal.com



SAMPLE

INSTALLING THE SAMPLE FILES.....	5
INTRODUCTION TO MICROSOFT PROJECT 2003	6
WHAT IS PROJECT 2003?.....	6
THE PROJECT 2003 ENVIRONMENT.....	6
TOOLBARS	15
REVIEW QUESTIONS.....	21
DEFINING THE PROJECT	22
CREATING A NEW PROJECT.....	22
OPENING A PROJECT.....	22
USING FILE PROPERTIES.....	23
ENTERING START AND FINISH DATES	24
ESTABLISHING A PROJECT CALENDAR.....	26
SAVING.....	28
QUITTING AND CLOSING.....	29
REVIEW QUESTIONS.....	30
TASKS	31
ENTERING TASKS.....	31
ENTERING TASK DURATIONS.....	32
ENTERING SUBTASKS.....	34
USING RECURRING TASKS	36
USING TASK NOTES	37
ASSIGNING MILESTONES.....	39
ENTERING CONSTRAINTS.....	40
EDITING TASKS	42
DELETING TASKS	43
MOVING TASKS	43
CREATING DEPENDENCIES.....	44
REVIEW QUESTIONS.....	52
RESOURCES	53
CREATING A RESOURCE LIST.....	53
ENTERING WORKING TIME.....	55
ENTERING COSTS	56
ENTERING NOTES	57
ASSIGNING RESOURCES TO A TASK.....	58
REVIEW QUESTIONS.....	62
VIEWS.....	63
INTRODUCTION TO VIEWS.....	63
USING THE CALENDAR VIEW.....	65
USING THE GANTT CHART VIEW.....	66
USING THE NETWORK DIAGRAM VIEW	68
USING THE TASK USAGE VIEW	70
USING THE TRACKING GANTT VIEW.....	72
USING THE RESOURCE GRAPH VIEW.....	73
USING THE RESOURCE SHEET VIEW.....	74
USING THE RESOURCE USAGE VIEW.....	75
REVIEW QUESTIONS.....	76
PRINTING REPORTS	77
VIEWING AND PRINTING REPORTS.....	77

USING PRINT PREVIEW.....	77
UNDERSTANDING PAGE SETUP	79
UNDERSTANDING THE PRINT DIALOG BOX.....	79
STARTING THE REPORTS DIALOG BOX	80
UNDERSTANDING THE DIFFERENT TYPES OF REPORTS	81
THE PROJECT GUIDE FOR PRINTING WIZARD	86
CUSTOMISING REPORTS.....	88
REVIEW QUESTIONS.....	90

SAMPLE

Installing the Sample Files

- Use Windows Explorer to create a folder called **Project 2003 Foundation Samples**, in the **My Documents** folder.
- If you are installing the sample files from the CD-ROM, place the CD-ROM in the CD drive and copy the files from the **project_2003_foundation_eur\exercise_files** to the **My Documents\Project 2003 Foundation Samples** folder.
- If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.
- **Notes for tutors:**
The above instructions are for Windows that has not been set-up for a multi-user environment (with individual profiles). The instructions above may require modification within a Windows multiuser environment. Where possible pre-install the relevant work files prior to use by students/delegates.

SAMPLE

Introduction to Microsoft Project 2003

When you have completed this learning module you will have seen how to:

- Use the main menu
- Use the Ask a Question box
- Use task panes
- Use the Getting Started pane
- Use the New Project pane
- Use the Search Results pane
- Use the Help pane
- Use the Office Assistant
- Show a toolbar
- Hide a toolbar
- Move a toolbar
- Use the Standard toolbar
- Use the Formatting toolbar
- Use the Project Guide

What is Project 2003?

Project 2003

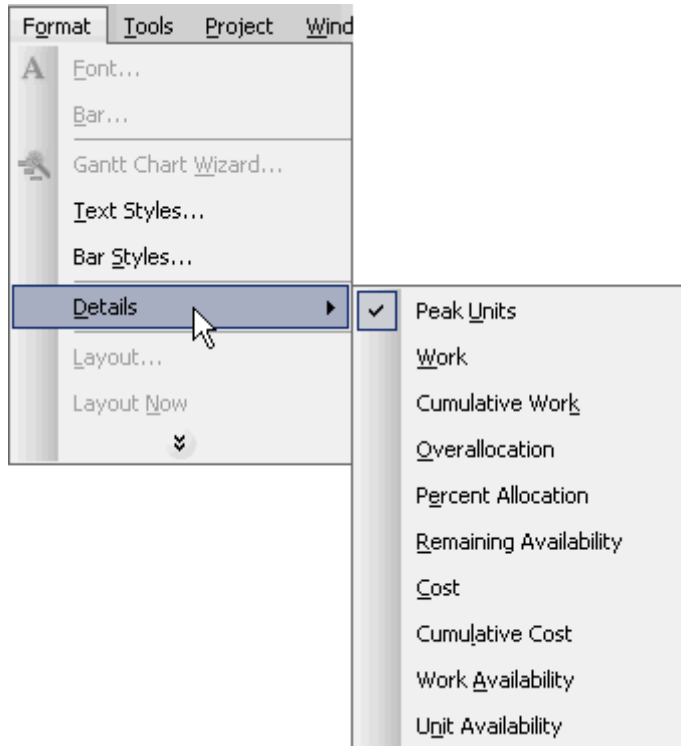
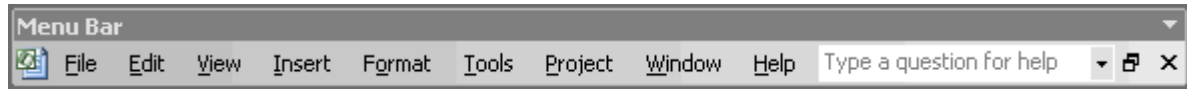
- **Microsoft Project 2003** is Microsoft's answer to project management. It provides all the tools you need for effective planning, tracking, problem solving, sharing, and completing a project in keeping with conventional management principles and practices.
- It can be used for a project of any size. It simply provides a framework to start with, as well as the means to organise and manage effectively. It is like having a project management assistant:



The Project 2003 Environment

Using the Main Menu

- The **Main Menu** (or **Menu Bar**) contains all of the Project 2003 menu options. From these menu options, you can access most of Project 2003's features. It consists of drop-down menus and submenus which allow you to select the command you want to execute:

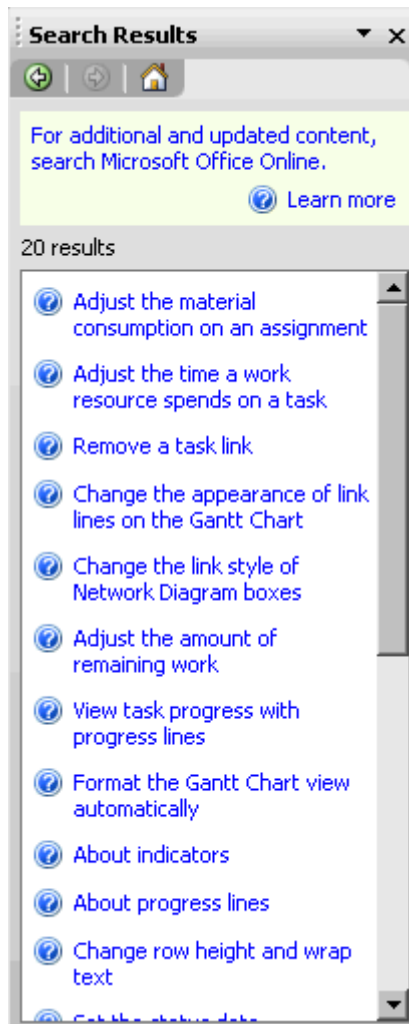


Using the Ask a Question Box

- As well as the menus and submenus, the **Main Menu** also contains the **Ask a Question** box at the far right. This feature allows you to type a question or key words for a subject with which you need help:



- Project displays any related topics in the **Search Results** task pane:

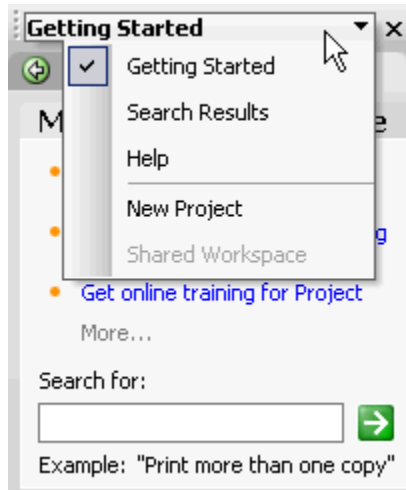


- You can click on the links to read about the topic.
- If you have internet access, Project will also search on Microsoft Office Online for related help topics.

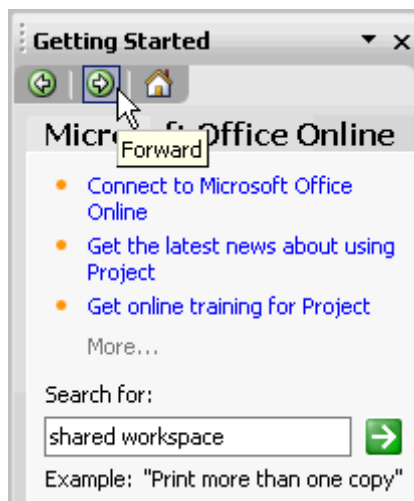
Using Task Panes

- The **Task Pane** is a like a dialog box which lists some of the most common tasks which you might want to accomplish with Project. The Task Pane automatically opens when Project is started for the first time. If the pane does not open, open it by selecting **View > Toolbars > Task Pane** from the main menu.
- This area of Project has been much improved over previous versions. Earlier versions only contained the New Project and Search task panes
- Project 2003 provides four task panes: **Getting Started, Search Results, Help** and **New Project**.

Note: The **Shared Workspace** task pane is not available for use in Project 2003 Standard:



- You can navigate between the task panes by clicking the **Other Task Panes** down arrow on the upper right hand corner of the task pane and selecting the pane you would like to use, or by using the **Forward** and **Back** arrows at the top left corner to move between panes:



To show or hide the Task Pane

- To show the task pane, right click on any toolbar and select **Task Pane**. A **check-mark** will appear beside the toolbar if it is selected

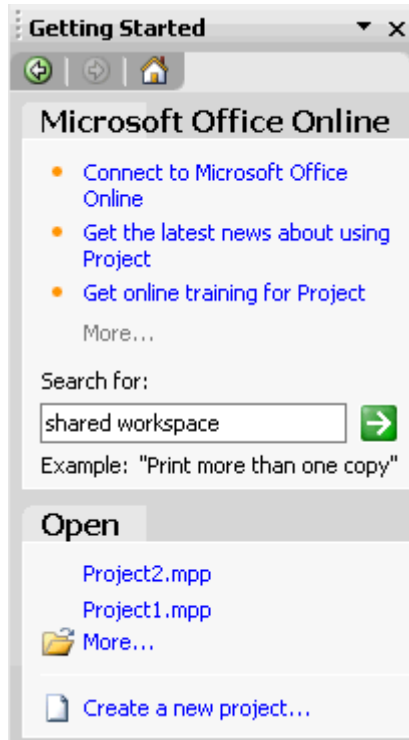
OR from the main menu, choose **View > Toolbars** and select **Task Pane** from the drop-down menu.

- To hide the task pane, right click on any toolbar and deselect **Task Pane**

OR from the main menu, choose **View > Toolbars** and deselect **Task Pane** from the drop-down menu.

Using the Getting Started Pane

- The **Getting Started** pane is a new feature in Project 2003. It is similar to task panes found in other Microsoft Office programs and contains links to Microsoft Office Online, a link to open recently used projects, and a link to create a new project:

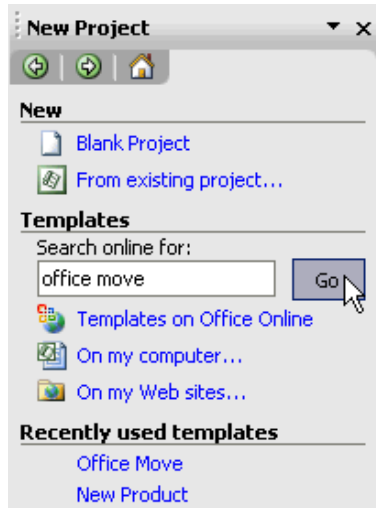


- Clicking on one of the listed projects will open the project.
- Clicking on the **More** link, will display the **Open** dialog box.
- Clicking on the **Create a new project** link, will display the **New Project** pane.

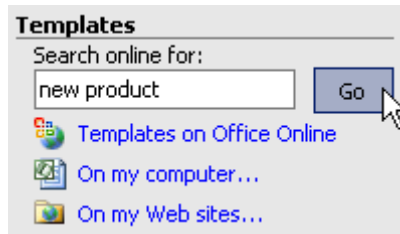
Using the New Project Pane

- The **New Project Pane** allows you to create a new project from scratch, from an existing project, or from a template:

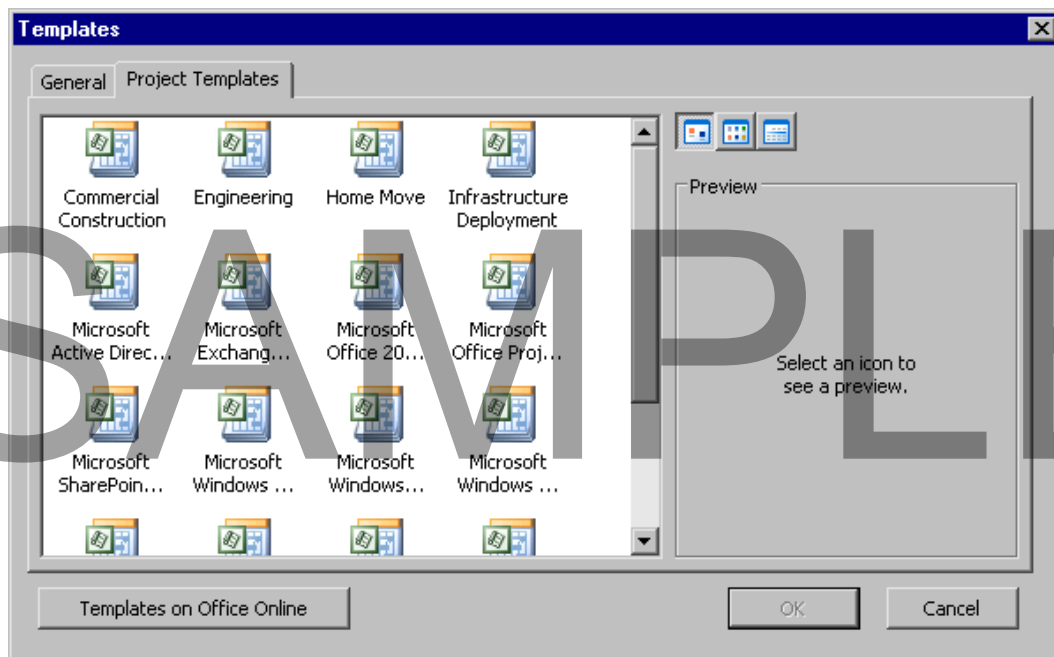
SAMPLE



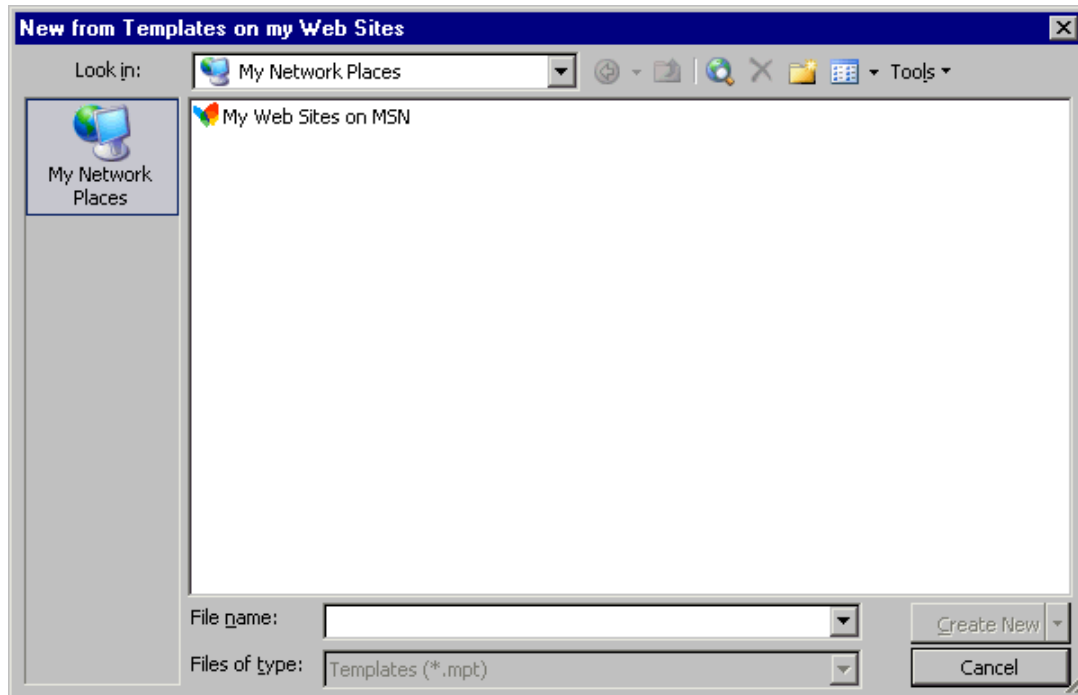
- Project 2003 now allows you to download templates from **Microsoft Office Online**. Simply enter the type of template you would like to search for in the **Search online for** text box and click on **Go**:



- Click on **On my computer** to open the **Templates** dialog box, which lists all templates which come with Project:



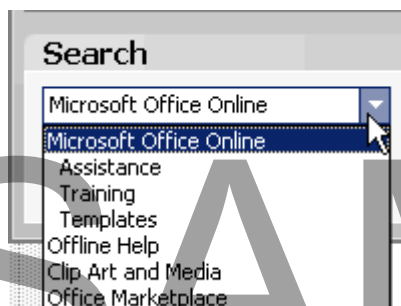
- Click on **On my Web sites** to open the **New from Templates on my Web Sites** dialog box and browse to find the desired template:



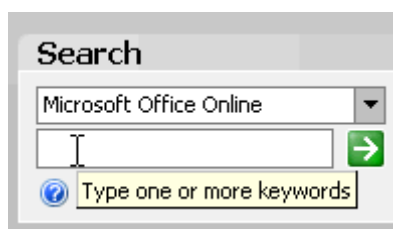
- The New Project pane also lists **Recently used templates** for you to select from.

Using the Search Results Pane

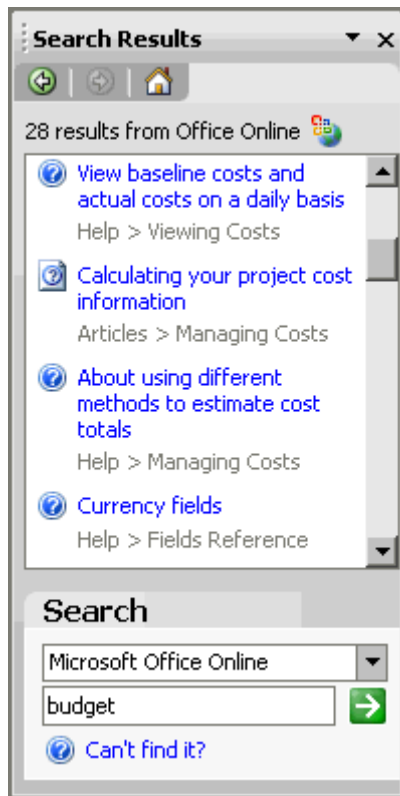
- The **Search Results Pane** has two areas. The upper portion is for displaying the results of a search, and the lower portion is for entering search criteria.
- In the **Search** area, you can use the drop-down menu to choose where you would like Project to look for the information:



- After selecting where you would like Project to search for the information, enter one or more keywords into the text box, then click on the green arrow:



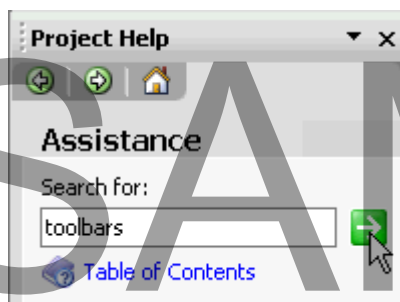
- Project displays the search results in the upper portion of the task pane:



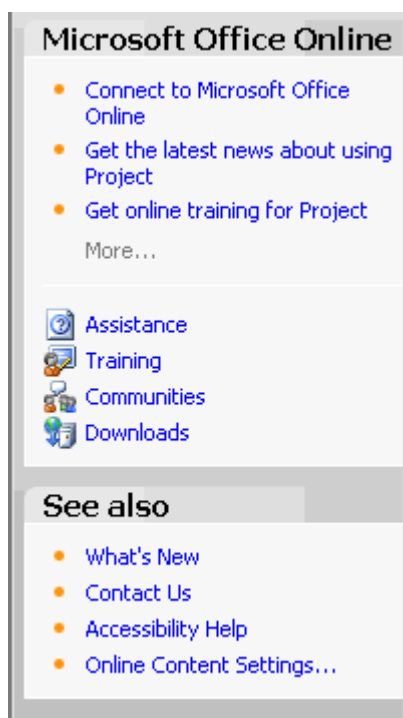
- Simply click on the link to display the Microsoft Office Help window.

Using the Project Help Pane

- The **Project Help** pane allows you to enter topics you would like assistance with in the Assistance area.
- Type one or more keywords in the **Search for** text box and click on the green arrow:



- This will take you back to the **Search Results** pane, with all related topics listed in the upper portion of the pane.
- The **Help** pane also provides links to aid you in searching for help on Microsoft Office Online and more links to other help features found in Project:



Using Microsoft Project Help

- Project 2003's help is similar to the help found in Microsoft Office products. You can access it several ways.

To access Microsoft Project Help

- Click on the **Help** icon found on the far right corner of the **Standard** toolbar:



OR from the main menu, choose **Help > Microsoft Project Help**

OR press the **F1** key.

- The Project Help Pane is displayed for you to search for help.

Accessing the Office Assistant

- The **Office Assistant** can also assist you in finding help on any questions you may have. Simply click on the **Office Assistant**, type your **question** into the text box and click **Search**. The assistant will show you a list of possible help topics on which you can click to open the **Microsoft Project Help** window and access the necessary information.

To show the Office Assistant

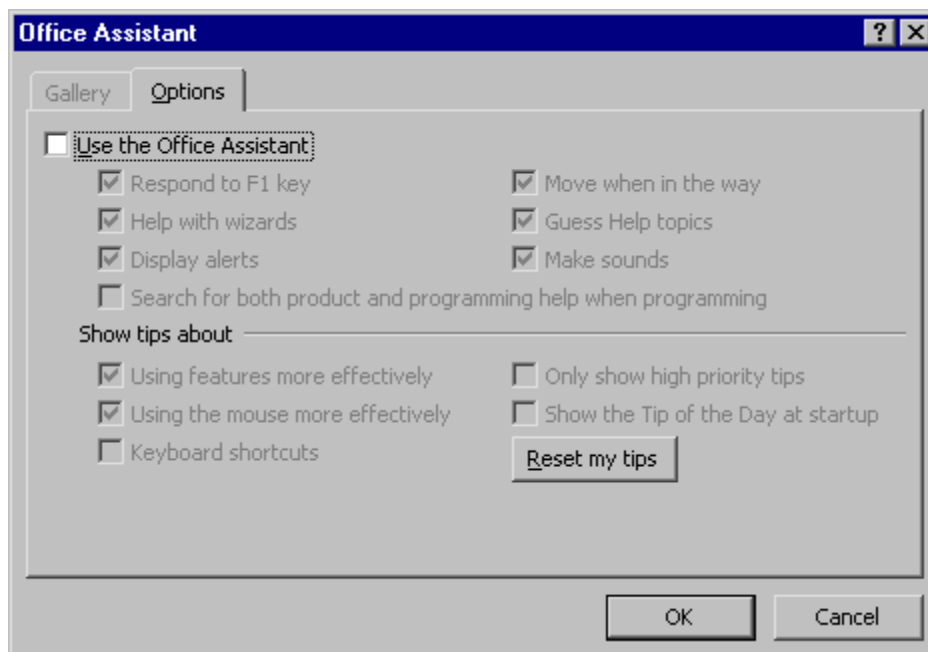
- From the main menu, choose **Help > Show the Office Assistant**.

To hide the Office Assistant

- From the main menu, choose **Help > Hide the Office Assistant**
OR right-click on the Office Assistant and select **Hide**.

To turn the Office Assistant off

- Click on the **Office Assistant**, choose **Options**, and deselect the **Use the Office Assistant** check box in the **Office Assistant** dialog box:



Toolbars

Using Toolbars

- Project has 14 toolbars in all. The **Standard** and **Formatting** toolbars are shown by default. The other toolbars are used only for specific functions in Project.

Showing a Toolbar

- From the main menu, choose **View > Toolbars** and select the toolbar you would like to show

OR right-click on any toolbar and select the toolbar you would like to show.

Note: A check-mark will appear beside the name of a toolbar if it is selected.

Hiding a Toolbar

- From the main menu, choose **View > Toolbars** and deselect the toolbar you would like to hide

OR right-click on any toolbar and deselect the toolbar you would like to hide.

Moving a Toolbar

- **Toolbars** can be **anchored** to any edge of the Project 2003 window, or they can **float** independently. To **move a toolbar**, hover your mouse over the left edge of the toolbar you want to move. Your cursor will change to the **move cursor**. Click your mouse and drag it to the location you want to move it to:



Using the Standard Toolbar

- The **Standard** toolbar provides quick access to commonly used actions. Each icon represents a particular action. When you point to an icon (without clicking), a descriptive tool tip appears to help you identify it. The following is a list and brief description of the icons on the **Standard** toolbar:



New - creates new project.



Open - opens an existing project.



Save - saves the current project.



Search - performs a search.



Print - prints the project.



Print Preview - changes display to print preview.



Spelling - performs a spell check.



Cut - cuts the selected range to the Office clipboard.



Copy - copies the selected range to the Office clipboard.



Paste - pastes the last item from the Office clipboard.



Format Painter - pastes formatting from one item in your project over another.



Undo - undoes the last action.



Hyperlink - inserts a hyperlink.



Link Tasks - links selected tasks.



Unlink Tasks - unlinks selected tasks.



Split Task - splits selected tasks.



Task Information - displays the Task Information dialog box.



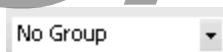
Task Notes - displays the Notes tab in the Task Information dialog box.



Assign Resources - opens the Assign Resource dialog box.



Publish All Information - publishes to the Microsoft Project Server.



Group by - groups tasks according to your selection in the drop down menu.



Zoom In - increases the zoom.



Zoom Out - decreases the zoom.



Go to Selected Task - changes the view to view details of the selected task.



Copy Picture - opens the Copy Picture dialog box.



Microsoft Project Help - opens the Project Help Pane.

Using the Formatting Toolbar

- The **Formatting** toolbar provides quick access to commonly used formatting actions. Each icon represents a particular action. When you point to an icon with your cursor (without clicking), a descriptive tool tip appears to help you identify it. The following is a list and brief description of the icons on the **Formatting** toolbar:



Outdent - makes the selected task a summary task.



Indent - makes the selected task a subtask.



Show Subtasks - shows subtasks.



Hide Subtasks - hides subtasks.



Hide Assignments - hides assignments.



Show - allows you to select the level of detail you want to see in your project from a drop-down menu.



Font - selects fonts from a drop-down menu.



Font Size - selects font size from a drop-down menu.



Bold - changes the selected text to bold.



Italic - changes the selected text to italic.



Underline - underlines the selected text.



Align Left - aligns the selected text to the left.



Center - aligns the selected text to centre.



Align Right - aligns the selected text to the right.



Filter - allows you to filter tasks according to the selected option from the drop-down menu.



AutoFilter - places a drop-down menu at the top right of every column to allow you to filter information easily.



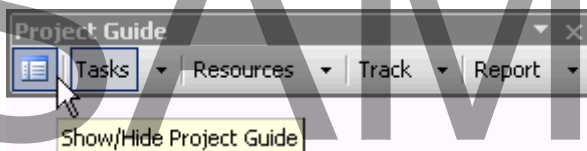
Gantt Chart Wizard - starts the Gantt Chart Wizard.

Using the Project Guide

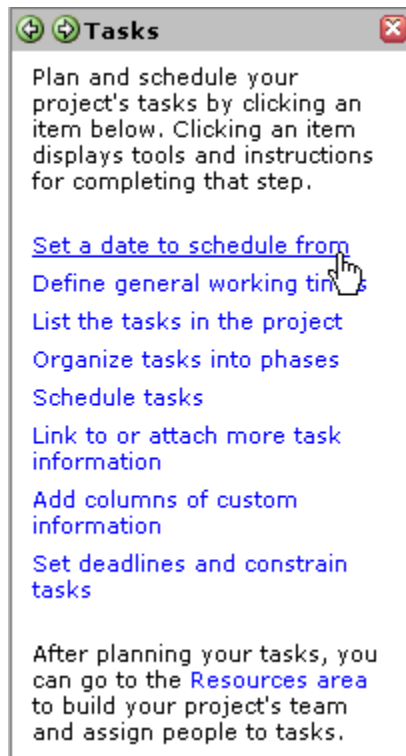
- The **Project Guide** is a new "goal-based user interface" which can help you start your project. It is similar to the task pane and provides guides and wizards in four main categories: **Tasks**, **Resources**, **Track** and **Report**.

To Show the Project Guide

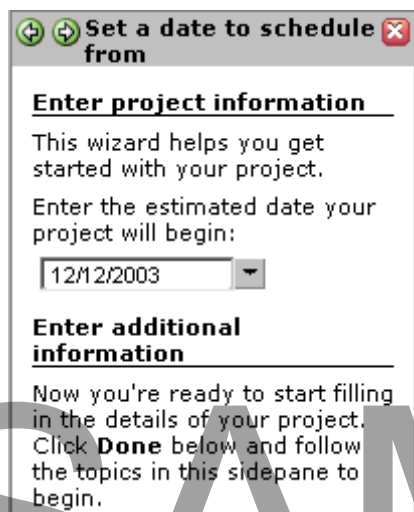
- To view the Project Guide, from the main menu, select **Tools > Options**. Click on the **Interface** tab and check off **Display Project Guide**.
- Then from the main menu, select **View > Toolbars > Project Guide**. The Project guide toolbar will be displayed.
- Click on the **Show/Hide Project Guide** button on the **Project Guide** toolbar to display the **Project Guide Pane**:



- When you click on a topic on the Project Guide toolbar, the corresponding **Project Guide Pane** will be displayed:



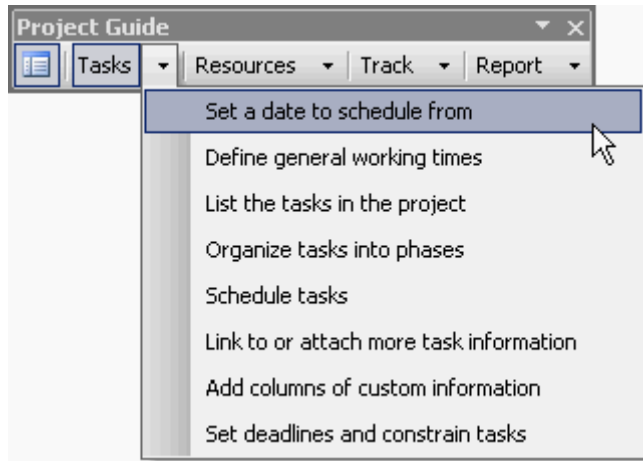
- Click on the blue links to go to a particular subject where Project will guide you through each step:



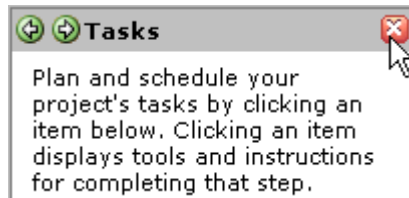
- You can easily navigate from one topic to the next using the **Project Guide toolbar**:



- Each topic has its own drop down menu which you can use to navigate through the steps:



- You can quit the Project Guide at any time by clicking on the red "X" at the top right corner of the Project Guide:



OR by deselecting the **Show/Hide Project Guide** button on the **Project Guide** toolbar.

Review Questions

How would you:

- Use the main menu?
- Use the Ask a Question box?
- Use task panes?
- Use the Getting Started pane?
- Use the New Project pane?
- Use the Search Results pane?
- Use the Help pane?
- Use the Office Assistant?
- Show a toolbar?
- Hide a toolbar?
- Move a toolbar?
- Use the Standard toolbar?
- Use the Formatting toolbar?
- Use the Project Guide?

Defining the Project

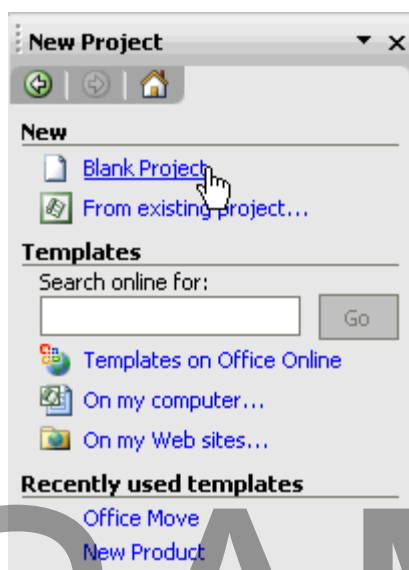
When you have completed this learning module you will have seen how to:

- Create a New Project
- Open a Project
- Use File Properties
- Enter Start and Finish Dates
- Establish a Project Calendar
- Save a Project
- Close a Project
- Quit Project

Creating a New Project

Starting a New Project

- From the main menu, choose **File > New** and click on **Blank Project** in the **New Project** task pane:



OR click on **New** icon  on the **Standard** toolbar

OR press the **Ctrl + N** key combination.

Opening a Project

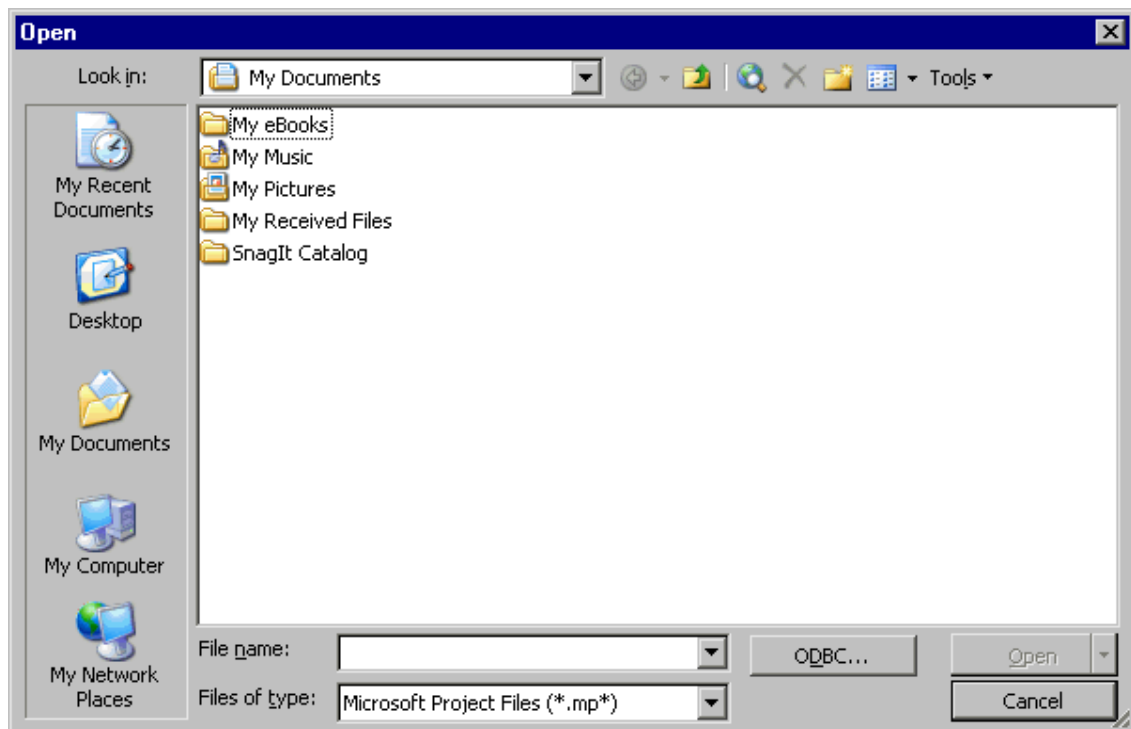
Opening a Project

- From the main menu, choose **File > Open**

OR click on **Open** icon  on the **Standard** toolbar

OR press the **Ctrl + O** key combination.

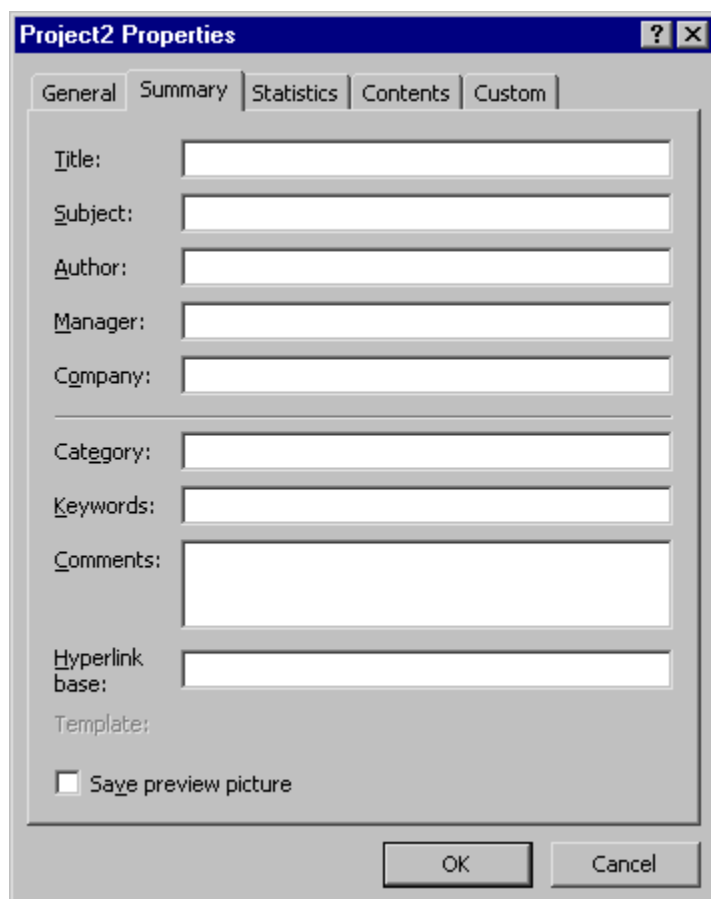
- This will display the **Open** dialog box. Browse to find the project you wish to open. Open either by **clicking on** the file and then clicking **Open**, or by **double clicking** it:



Using File Properties

Utilising File Properties

- **File Properties** automatically gathers and stores miscellaneous information about a file. To access file properties, from the main menu, choose **File > Properties**.
- The **File Properties** dialog box is displayed.
- The **General** tab provides a quick summary of the name, type, location, size, creation date, modified date, accessed date and attributes of the project.
- In the **Summary** tab, you can enter any additional information you may want to record regarding your project:



- The **Statistics** tab lists the dates the project was last created, modified, accessed and printed, as well as who saved it last, the revision number and the total editing time.
- The **Contents** tab shows a project summary. It tells the start date, finish date, duration, work hours, cost, % complete, and % work complete.
- The **Custom** tab allows you to add custom file properties to the project.

Entering Start and Finish Dates

Inputting Start and Finish Dates

- The first step in starting a new project is establishing basic project information. The start *or* finish date is what you will use to anchor your project. Your schedule will be built around either the start date or the finish date which you choose.
- The start and finish date information is entered in the **Project Information** dialog box.

To Enter Project Information

- To enter project information, from the main menu, choose **Project > Project Information**. The **Project Information** dialog box will be displayed:

Project Information for 'Project1'

Start date: Fri 12/12/03 Current date: Fri 12/12/03

Finish date: Fri 12/12/03 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Buttons: Help, Statistics..., OK, Cancel

- Depending on what you choose from the **Schedule from** drop-down menu (**Project Start Date** is the default), either the start date or finish date will be available for you to select:

Project Information for 'Project1'

Start date: Fri 12/12/03 Current date: Fri 12/12/03

Finish date: Fri 12/12/03 Status date: NA

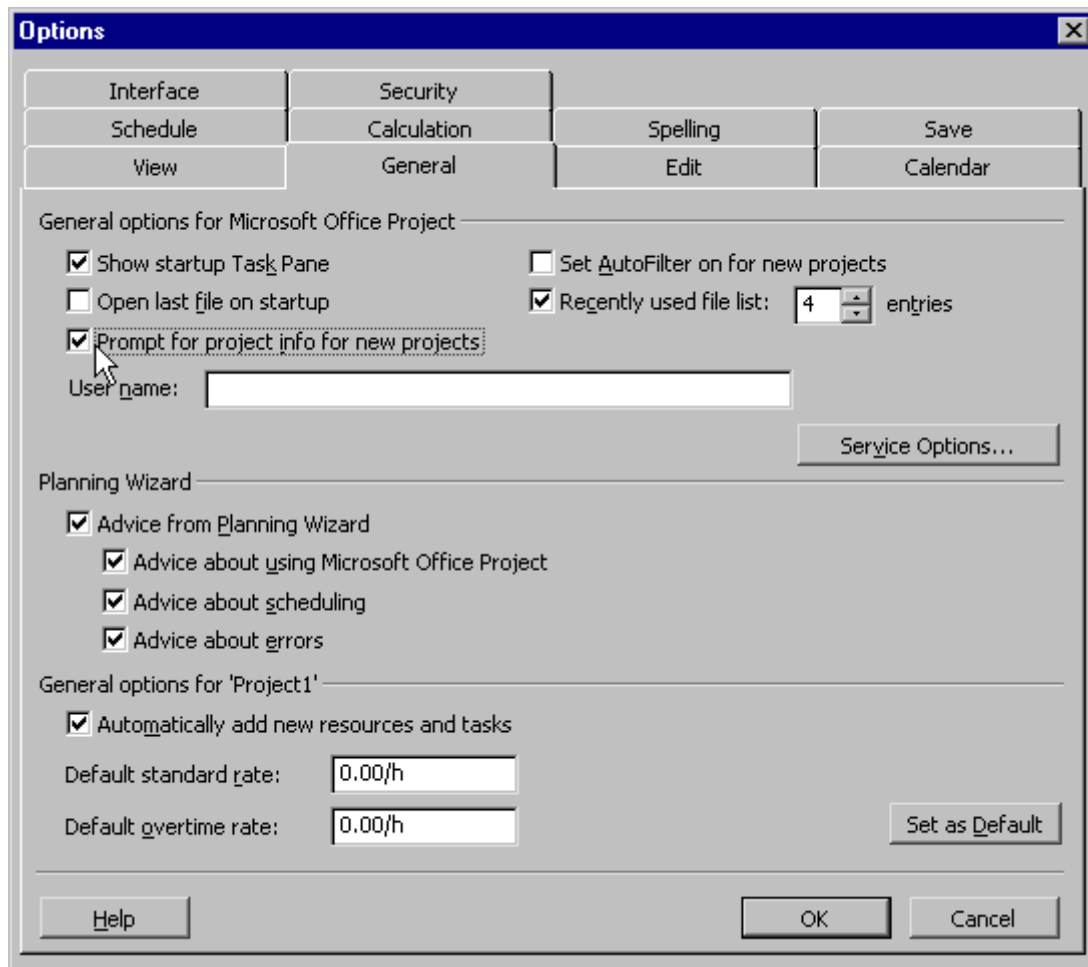
Schedule from: Project Start Date
 Project Start Date
 Project Finish Date

All tasks Priority: 500

Buttons: Help, Statistics..., OK, Cancel

- You can either **type** in the date, or click the **down arrow** to display a **pop-up calendar** to select a date.
- Typically, the other fields (**Current date**, **Status date**, **Calendar**, and **Priority**) can be left as the default values.
- Click **OK**. Project will close the dialog box and save the information for you.
- This information can be changed at any time throughout your project, and can be useful in trying out "what-if" scenarios in the planning stage.
- You can choose to have the **Project Information** dialog box open automatically every time you start a new project by choosing **Tools > Options** to open the **Options** dialog box. On the **General** tab, check off **Prompt for project info for new projects**:

SAMPLE



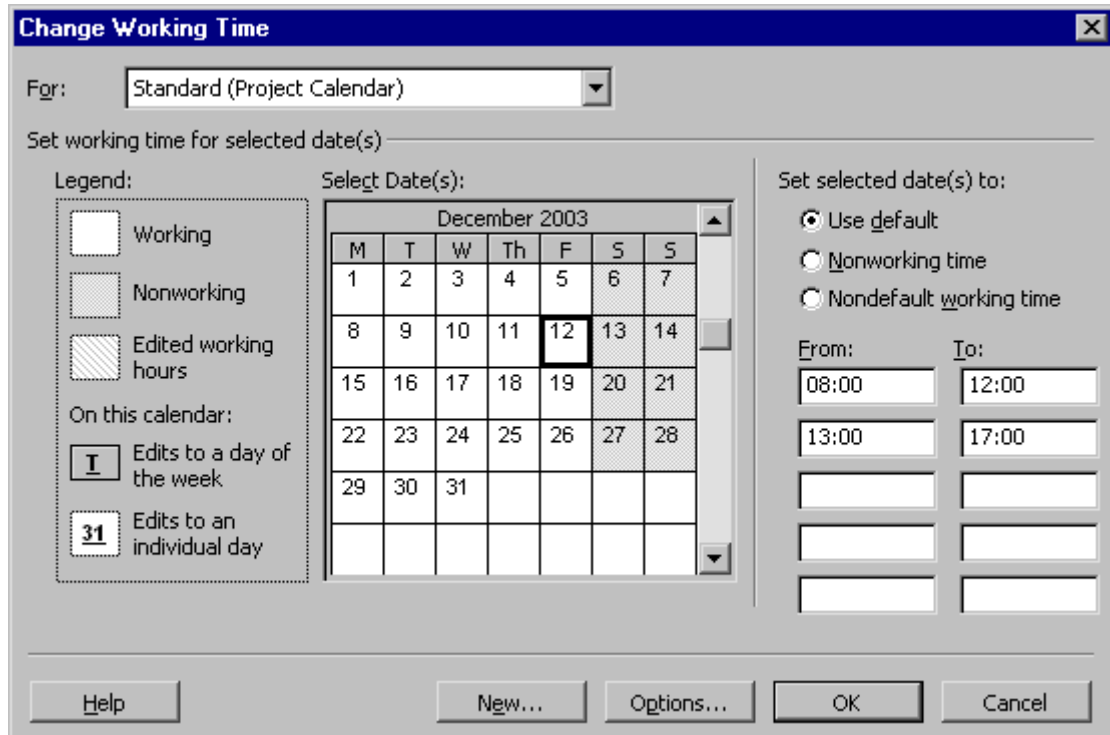
Establishing a Project Calendar

Setting up a Project Calendar

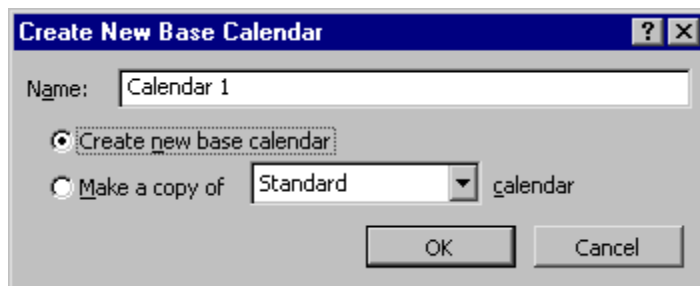
- Project supplies three basic calendars (**Standard**, **Night Shift** and **24 Hours**) which you can use as foundations to create your own base calendar. You can make a calendar which indicates general working times for each resource or group of resources. Project will use this information for things like scheduling resources and converting task durations.

Making a New Calendar

- To make a new calendar, from the main menu, choose **Tools > Change Working Time**. The **Change Working Time** dialog box will open:



- Click on **New**. The **Create New Base Calendar** dialog box will open:



- Enter a descriptive name for the new calendar.
- Use the radio buttons to either **create a new base calendar**, or make a **copy** of the type of calendar you select from the drop-down menu.
- Click **OK** to go back to the **Change Working Time** dialog box to customise the new base calendar.

Changing Calendar Options

- Click on **Options** to open the **Calendar** tab in the **Options** dialog box. Enter the appropriate information to describe a typical workday and workweek.

Note: You can change the first day of the week from Sunday to Monday (or any other day) by selecting **Monday** from the **Week starts on** drop down menu.

- Click **OK** to close the **Options** dialog box:

Options

Interface Security
Schedule Calculation Spelling Save
View General Edit **Calendar**

Calendar options for 'Project1'

Week starts on: Monday

Fiscal year starts in: January

Use starting year for FY numbering

Default start time: 08:00 These times are assigned to tasks when you enter a start or finish date without specifying a time. If you change this setting, consider matching the project calendar using the Change Working Time command on the Tools menu.

Default end time: 17:00

Hours per day: 8.00

Hours per week: 40.00

Days per month: 20

Set as Default

Help OK Cancel

To change a Calendar

- You can make exceptions to the regular schedule set in the **Options** dialog box by altering working times and working days.
- In the **Change Working Time** dialog box, select the calendar you would like to make the changes to from the **For** drop-down menu.
- Use the **Select Date(s)** portion of the dialog box to select a specific date or range of dates.
- Use the **Set Selected Date(s)** to portion of the dialog box to make the necessary changes.

Saving

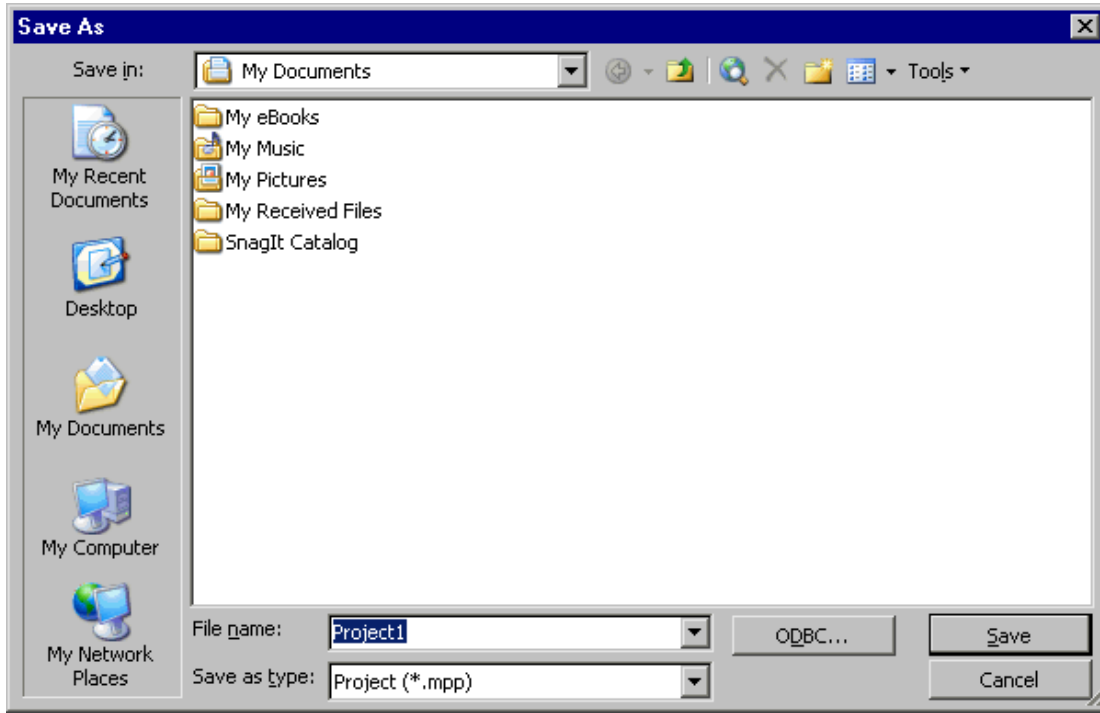
Saving Your Project

- From the main menu, choose **File > Save**

OR click on **Save** icon  on the **Standard** toolbar

OR press the **Ctrl + S** key combination.

- If you are saving your project for the first time, the **Save As** dialog box will open:

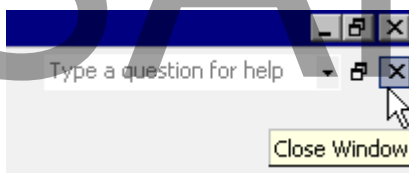


- **Browse** to find the location where you would like to save your project, enter a name in the **File name** text box, and click **Save**.

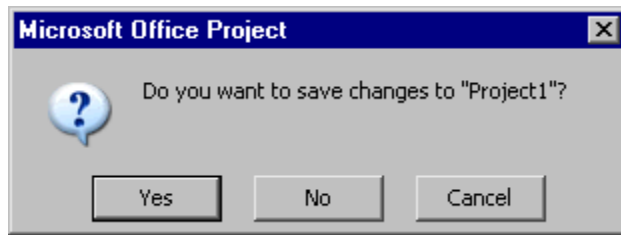
Quitting and Closing

Closing a Project

- From the main menu, choose **File > Close**
OR click on the **Close Window [x]** button on upper right hand corner of the **Project window**:



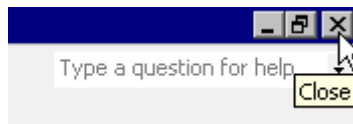
- If you have not saved your project yet, you will be prompted to do so:



Quitting Project 2003

- From the main menu, choose **File > Exit**

OR click on **Close Window [x]** button on the **title bar**:



Review Questions

How would you:

- Create a New Project?
- Open a Project?
- Use File Properties?
- Enter Start and Finish Dates?
- Establish a Project Calendar?
- Save a Project?
- Close a Project?
- Quit Project?

SAMPLE

Tasks

When you have completed this learning module you will have seen how to:

- Enter a task
- Enter task durations
- Enter subtasks
- Use recurring tasks
- Use task notes
- Assign milestones
- Enter constraints
- Edit tasks
- Delete tasks
- Move tasks
- Create dependencies

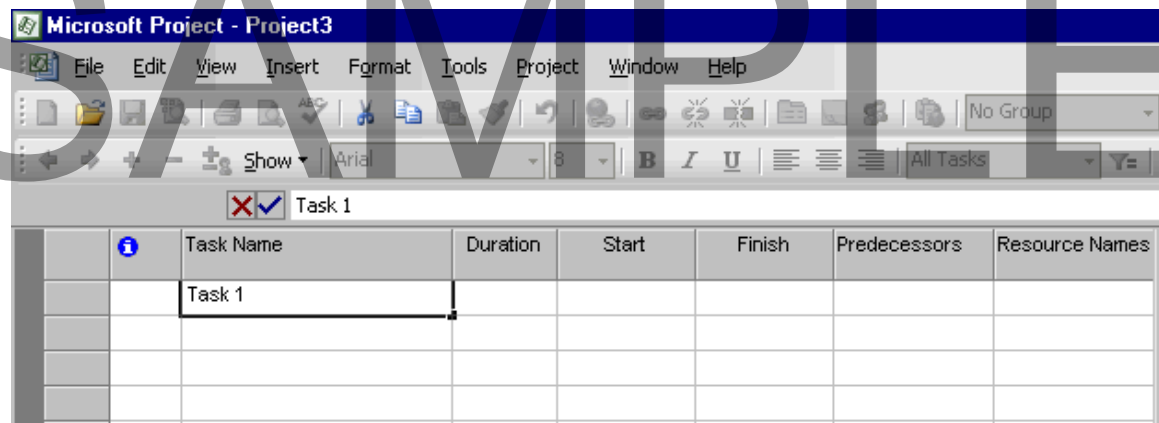
Entering Tasks

- Tasks are the specific activities which must be completed in order to finish your project – essentially, a 'to-do' list. Your task list is the backbone of your project plan. It is essential to create your task list as comprehensively as possible because if a required task is omitted, you may not be able to achieve all of your goals. It is beneficial to create your task list in approximately the same order as the tasks will be performed, although it is not necessary to be completely accurate as there are ways to edit, add, delete, and move tasks.

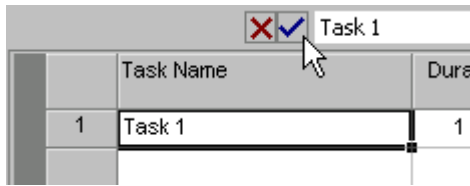
Entering Tasks

- There are a couple ways to enter a new task. The first is to click in the **Task Name** column in the first row of the **Gantt table** and enter the task name. The task name will also appear in the **entry bar** above the **Gantt table**.

Note: The Gantt Chart is the default view in Project. It will be discussed in more detail later:



- You can accept the information you entered by clicking on the **check mark** in the **entry bar** or by moving to another cell:



- After you accept the information, the task is assigned an **ID number** which is displayed in the far left column.
- The second way to enter a task is to enter the information in the **General** tab of the **Task Information** dialog box.
- You can access the **Task Information** dialog box by clicking on **Task Information** icon

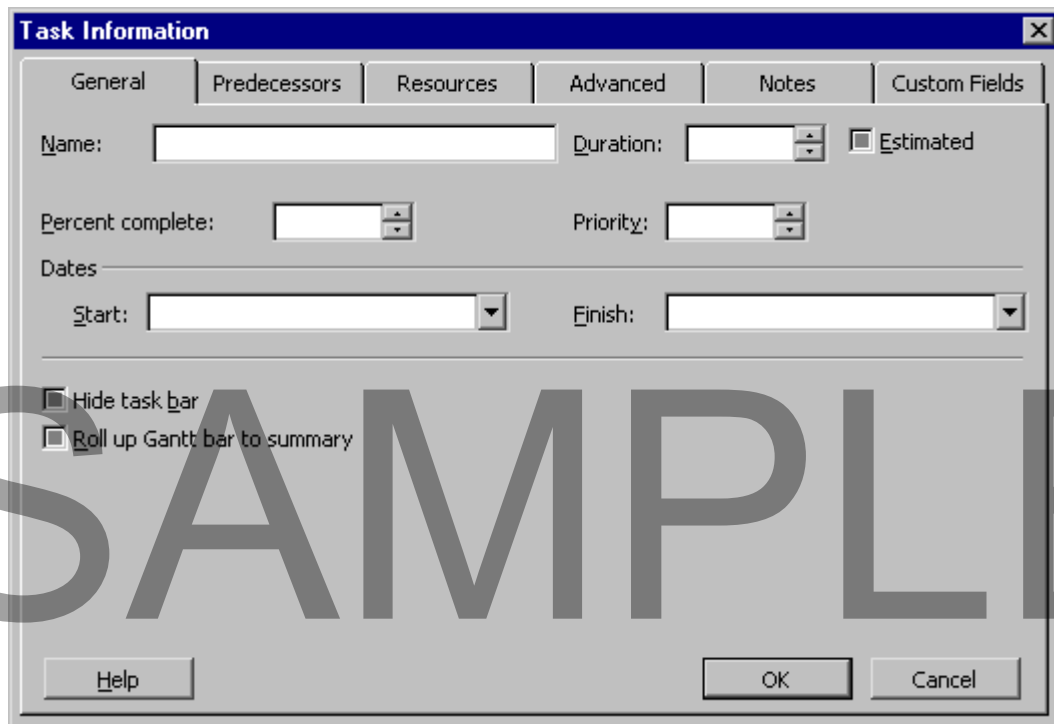


on the **Standard** toolbar

OR from the main menu, choose **Project > Task Information**

OR double-click on the task

OR press the **Shift + F2** key combination:



Entering Task Durations


Entering Task Durations

- Project uses **1 day** as the default length for task durations. If your estimate for the duration of your task is different than one day, you can change it.
- Project uses abbreviations for different time measures. Use these abbreviations when typing in the duration:

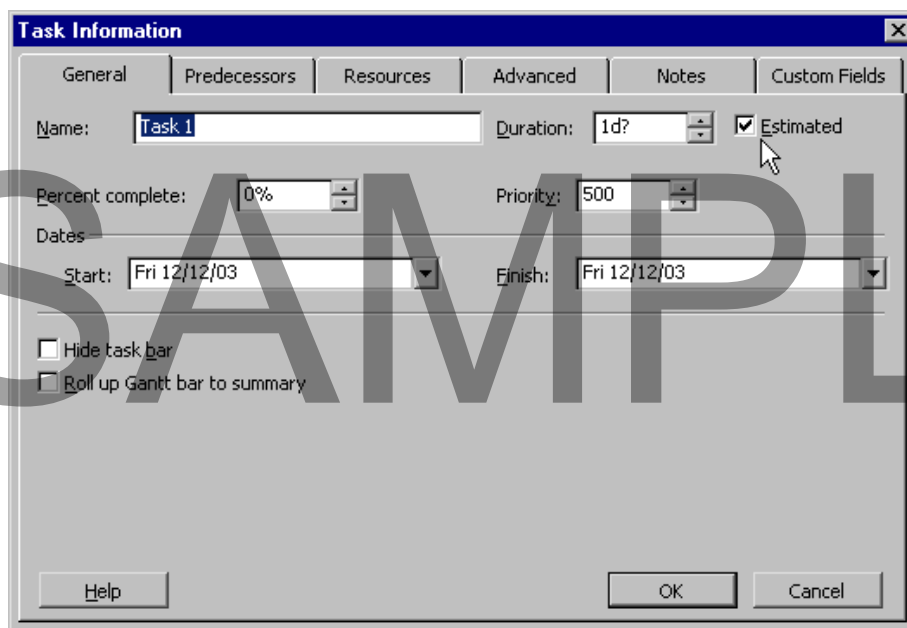
m Minutes
h Hours
d Days
ed Elapsed days
w Weeks
mo Months

- To change the duration of a task, either **type** the duration into the **Duration** column in the **Gantt table** view

OR use the arrow buttons on the right end of the **Duration** box to adjust the duration incrementally:

	Task Name	Duration
1	Task 1	1 day? 

- Note the **question mark** beside the duration. This indicates that the duration is an estimate. Unless you know the exact beginning and end times, leave it as an estimate so that Project will have greater flexibility in adjusting the amount of time needed to complete a task.
- When you manually change the duration of a task, the question mark which indicates an estimated duration disappears. To specify that the changed duration is still an estimate, check the **Estimated** box in the **Task Information** dialog box:



Task Information

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name: Duration: Estimated

Percent complete: Priority:

Dates
 Start: Finish:

Hide task bar
 Roll up Gantt bar to summary

- Project automatically calculates the **Start** and **Finish** dates based upon the basic project information you provided in the **Project Information** dialog box and the task duration you entered. It is best to leave the dates as Project has calculated them and fine-tune them at a later date.



Entering Subtasks

Entering Subtasks


- Subordinate tasks**, or **subtasks**, are used to break large tasks into smaller units until you reach the level of detail you want. This can be especially useful in the displaying and printing of your project.
- By breaking large tasks into smaller, more manageable tasks, you may be able to schedule them to run concurrently, thereby reducing both the duration of the task and the duration of the project.


To enter a subtask

- Insert a row by highlighting the row directly below where you want to insert a subtask:

		Task Name	Duration	Start	Finish
1		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
3		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03

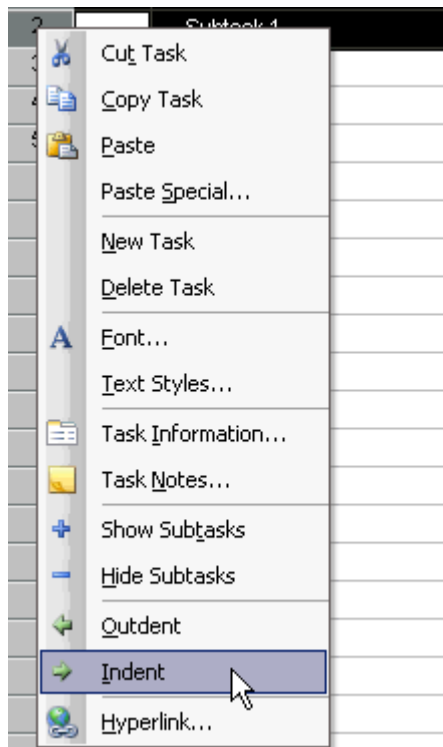
- To create a new row, from the main menu, choose **Insert > New Task**
OR press the **Insert** key on your keyboard.
- This will create a new task row:

		Task Name	Duration	Start	Finish
1		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
2					
3		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
5		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03

- Enter the name of the subtask. Accept the new task by clicking on the check mark in the entry bar, or by moving to another cell.
- Click on the **Indent** icon  on the **Formatting** toolbar to indent the new task to make it subordinate

OR right-click on the new task's ID number at the far left and select **Indent**

from the drop-down menu:



- Note how the new subtask is indented, and the task above it is now bolded (indicating that it is a summary task) and has a minus sign beside it which allows you to show or hide the subtask:

		Task Name	Duration	Start	Finish
1		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
2		Subtask 1	1 day?	Fri 12/12/03	Fri 12/12/03
3		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
5		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03

- It is also possible to break a task down even further and create a subtask for a subtask:

		Task Name	Duration	Start	Finish
1		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
2		Subtask 1	1 day?	Fri 12/12/03	Fri 12/12/03
3		Sub Subtask	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
5		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
6		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03

- This can be especially useful when you are working on a large project which requires many levels of detail.

Creating a Summary Task

- Alternately, you can choose to group the tasks you have already entered under a summary task.
- Insert a row by highlighting the row directly below where you want to create a summary task:

		Task Name	Duration	Start	Finish
		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
2		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
3		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03

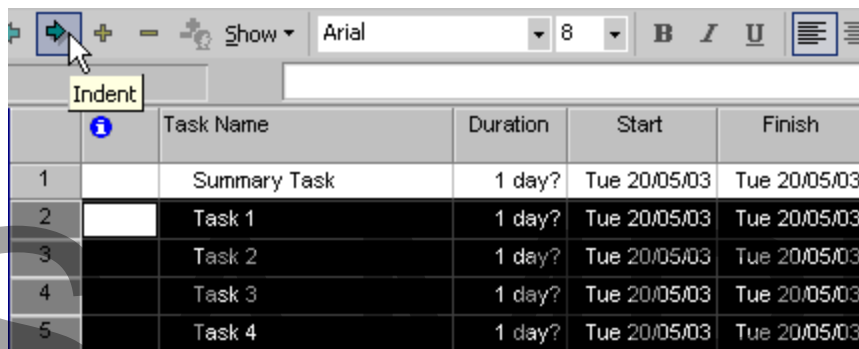
- To create a new row, from the main menu, choose **Insert > New Task**

OR press the **Insert** key on your keyboard.


- This will create a new task row. Enter the name of the summary task. Accept the new task name by clicking on the check mark in the entry bar, or by moving to another cell.
- Select the rows which you would like to group under the summary task by highlighting them.

- Click on the **Indent** icon  on the **Formatting** toolbar to indent the tasks to make them subordinate

OR right-click on the highlighted tasks and select **Indent** from the drop-down menu:



The screenshot shows a software interface with a formatting toolbar at the top. The 'Indent' icon, which is a green arrow pointing right, is highlighted. Below the toolbar is a table with the following data:

		Task Name	Duration	Start	Finish
1		Summary Task	1 day?	Tue 20/05/03	Tue 20/05/03
2		Task 1	1 day?	Tue 20/05/03	Tue 20/05/03
3		Task 2	1 day?	Tue 20/05/03	Tue 20/05/03
4		Task 3	1 day?	Tue 20/05/03	Tue 20/05/03
5		Task 4	1 day?	Tue 20/05/03	Tue 20/05/03

Using Recurring Tasks

Entering Recurring Tasks

- Certain tasks fall into the category of recurring tasks. They could happen on a daily or weekly basis, or at intermittent times throughout your project. Project allows you to create the task once and then designate both frequency and timing to it.

To create a Recurring Task

- From the main menu, choose **Insert > Recurring Task**.
- The **Recurring Task Information** dialog box opens:

- Enter a name in the **Task Name** box.
- Enter the duration in the **Duration** box.
- Enter the recurrence pattern by using the **option buttons**, **drop-down menus** and **check boxes** in the **Recurrence pattern** section.
- Enter the length of time the task recurs by using the options in the **Range of recurrence** section.
- Click **OK** to return to the Gantt Chart view.
- Notice the recurring task symbol in the **Indicator** column:

		Task Name	Duration	Start
100		Landscaping and Grounds	12 days	Mon 05/07/04
101		Pour concrete driveway a	2 days	Mon 05/07/04
102		Install backyard fence	2 days	Wed 14/07/04
103		Sod and complete planting	2 days	Fri 16/07/04
104		Sod and complete planting	1 day	Tue 20/07/04
105		Final Acceptance	150 days	Mon 05/01/04
106		Complete final inspection f	1 day	Wed 21/07/04
107		Cleanup for occupancy	1 day	Thu 22/07/04
108		Perform final walk-through	1 day	Fri 23/07/04
109		Complete punch list items	5 days	Mon 26/07/04
110		Recurring Task	146 days	Mon 05/01/04

Using Task Notes

Entering Task Notes

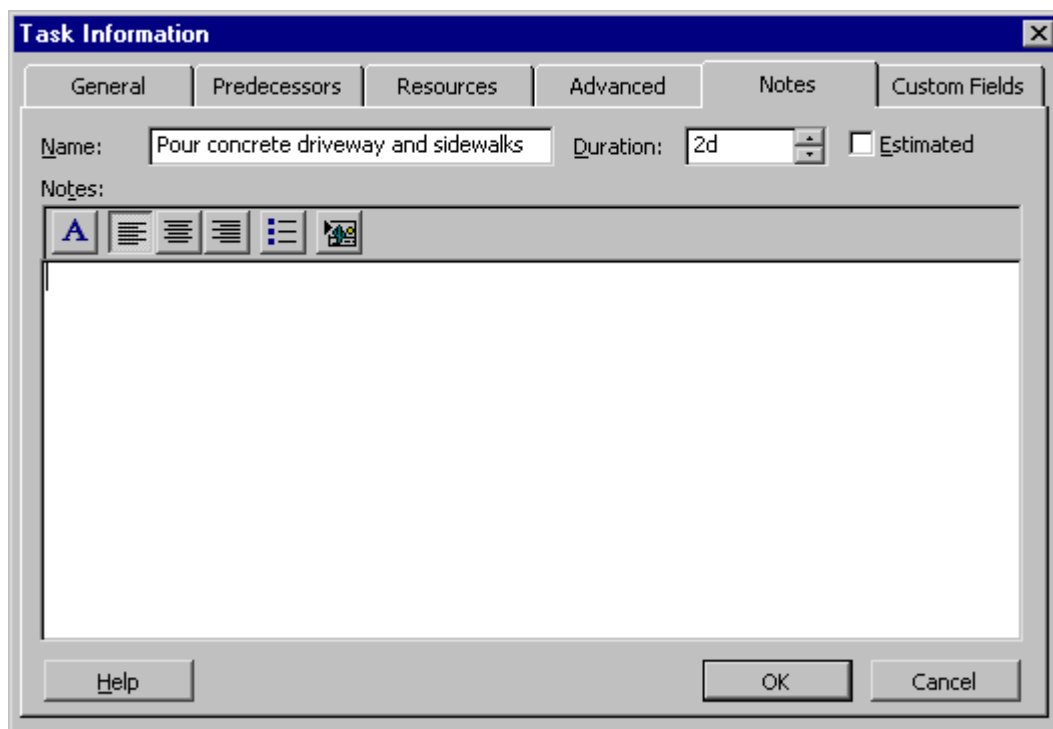
- Notes can be attached to a task to quickly display information regarding anything related to it. Notes can be displayed onscreen and included in printed reports.

To enter a Task Note:




- Select the task to which you would like to add a note and from the main menu, choose **Project > Task Notes**

OR right-click on the task and select **Task Notes** from the drop-down menu

OR double-click on the task and select the **Notes** tab in the **Task Information** dialog box:



- Use the area provided to enter your notes. You can use the formatting tools provided to format your note.
- Click **OK** to save and attach the note to your task and return to the Gantt Chart view.
- Notice the note symbol in the Indicator column:

		Task Name	Duration	Start
100		Landscaping and Grounds	12 days	Mon 05/07/04
101		Pour concrete driveway a	2 days	Mon 05/07/04
102		Install backyard fence	2 days	Wed 14/07/04
103		Sod and complete planting	2 days	Fri 16/07/04
104		Sod and complete planting	1 day	Tue 20/07/04

- Hover your mouse pointer over the note symbol to read the note:

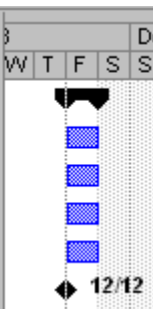
		Task Name	Duration	Start
100		[-] Landscaping and Grounds	12 days	Mon 05/07/04
101		Pour concrete driveway a	2 days	Mon 05/07/04
102		Notes: 'This is a note.'	2 days	Wed 14/07/04
103		Sod and complete planting	2 days	Fri 16/07/04
104		Sod and complete planting	1 day	Tue 20/07/04

Assigning Milestones

Assigning Milestones

- Milestones are used to mark key moments in a project and can help you monitor your progress. Although a milestone is usually a task with no duration, it is possible to make a task which has a duration as a milestone.
- Milestones are marked by a diamond in the Gantt Chart view:

		Task Name	Duration	Start	Finish					De
1		[-] Summary Task	1 day?	Fri 12/12/03	Fri 12/12/03					
2		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03					
3		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03					
4		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03					
5		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03					
6		Milestone 1	1 day?	Fri 12/12/03	Fri 12/12/03					



To create a Milestone

- Create a new task and enter a null value in the duration field. Project will automatically recognise it as a milestone

OR double-click on the task you would like to make a milestone and select the **Mark task as milestone** checkbox in the **Advanced** tab of the **Task Information** dialog box:

SAMPLE

- Click **OK**.

Entering Constraints

Adding Constraints

- A constraint is a parameter placed upon a task which limits the start or finish of a task.
- By default, the **As Soon as Possible** constraint is applied to every task. The following is a list of all of the constraint types which are available to choose from:

As Soon as Possible

Schedules the task to start as soon as the beginning of the project.

As Late as Possible

Schedules the task to end no later than the end of the project.

Finish No Earlier Than/ Finish No Later Than

Schedules the tasks to finish no later or sooner than a specific date.

Must Finish On/ Must Start On

Schedules the task to finish on or start on a specific date.

Start No Earlier Than/

Start No Later Than

Schedules the task to start no earlier than or no later than a specific date.

To enter a Constraint

- Open the **Task Information** dialog box and click on the **Advanced** tab:

The screenshot shows the 'Task Information' dialog box with the 'Advanced' tab selected. The 'Name' field contains 'Task 1' and the 'Duration' is '1d?'. The 'Estimated' checkbox is checked. Under 'Constrain task', the 'Deadline' is set to 'NA'. The 'Constraint type' dropdown menu is open, displaying a list of options: 'As Soon As Possible', 'As Late As Possible', 'As Soon As Possible', 'Finish No Earlier Than', 'Finish No Later Than', 'Must Finish On', 'Must Start On', 'Start No Earlier Than', and 'Start No Later Than'. The 'Constraint date' is also set to 'NA'. Other options include 'Task type', 'Calendar', 'WBS code', 'Earned value method', and 'Mark task as milestone'. The 'Effort driven' checkbox is checked, and 'Scheduling ignores resource calendars' is unchecked. Buttons for 'Help', 'OK', and 'Cancel' are visible at the bottom.

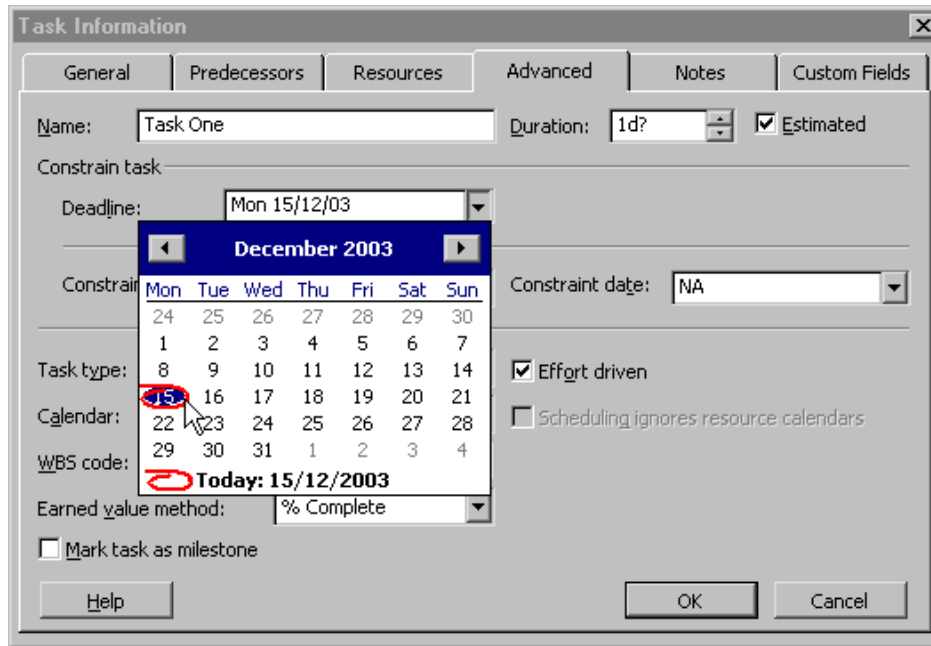
- Choose the desired constraint from the **Constraint type** drop-down menu and enter a constraint date if applicable.

Using Deadlines

- Deadlines differ from constraints in the way that Project doesn't take the deadline date into consideration when creating a schedule. It will, however, alert you if the estimated finish date for a task is after the deadline date, by flagging the task in the Gantt view with an exclamation mark.

To Create a Deadline

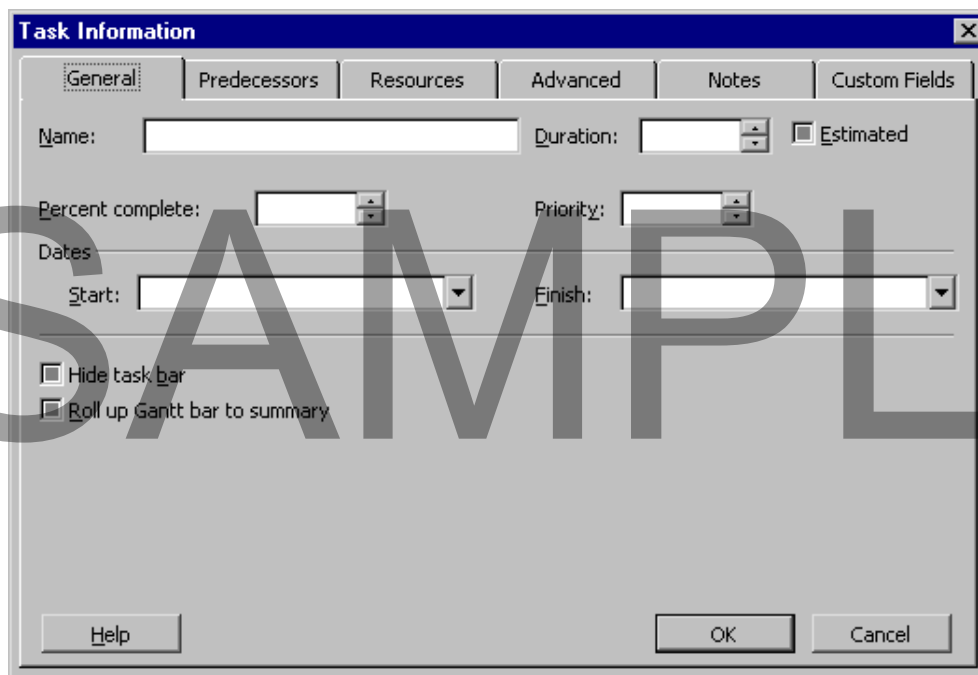
- To create a deadline, open the **Task Information** dialog box of the task you would like to assign a deadline to. Click on the **Advanced** tab and either type a date into the **Deadline** field or use the drop-down calendar to select the deadline date:



Editing Tasks

Editing Tasks

- Tasks can be edited using a number of different methods, although the easiest and most convenient way is to use the **Task Information** dialog box because all of the task information is readily available for you to review and change if necessary:



Deleting Tasks

Deleting Tasks

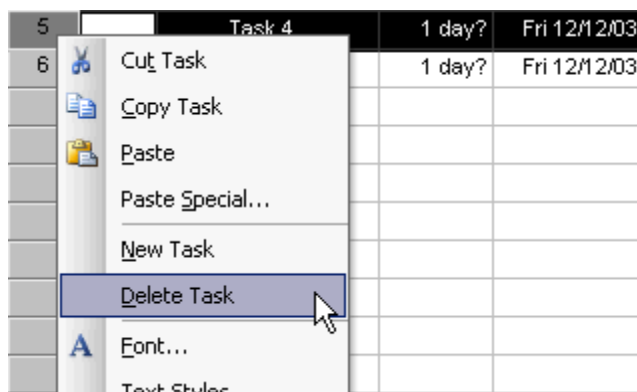
- Occasionally you will need to delete tasks either because they were entered in error or they are no longer relevant. There are several ways to do this.

To delete a Task

- Highlight the task or range of tasks to be deleted.
- From the main menu, choose **Edit > Delete Task**

OR press the **Delete** key on your keyboard

OR right-click on the highlighted task(s) and select **Delete Task**:



Moving Tasks

Moving Tasks

- Highlight the task or range of tasks which you would like to move.
- Place your mouse over the ID number of the task until it becomes a move cursor:

ID	Task Name	Duration	Start	Finish
1	Summary Task	1 day?	Fri 12/12/03	Fri 12/12/03
2	Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
3	Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
4	Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
5	Task 4	1 day?	Fri 12/12/03	Fri 12/12/03
6	Milestone 1	1 day?	Fri 12/12/03	Fri 12/12/03

- Drag and drop the task(s) to the desired location

OR cut and paste the task to the desired location.

- An important thing to keep in mind when moving tasks is that when you move a summary task, its subtasks move with it. In order to move a subtask to a new location, you must first out-dent it so that it is at the highest possible level.

Creating Dependencies

Establishing Dependencies

- Dependencies are a way to link tasks together in order to describe which tasks must precede or succeed one another - some tasks must start or finish before another task can begin or end. Creating dependencies allows Project to create a flexible time framework relative to the task preceding or succeeding it.
- There are two types of tasks in a dependency. A **predecessor** task must occur before another task. A **successor** task must occur after another task.
- There are four different types of dependencies (or linkages) which will be discussed in detail.

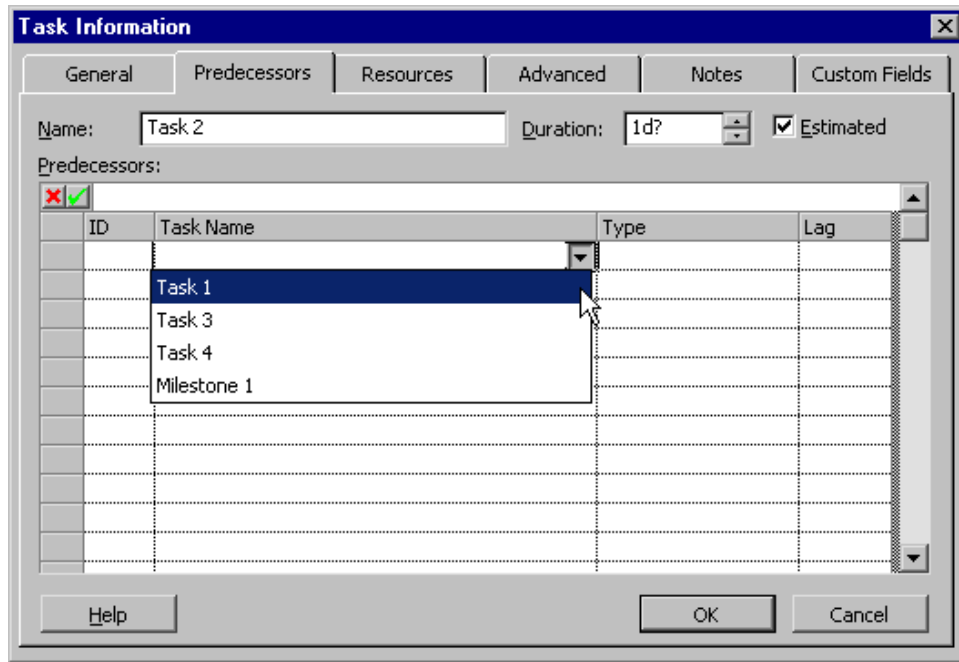
Using Finish-to-Start (FS) Dependencies

- The **finish-to-start** dependency is the most common type of relationship. The start of one task begins as soon as its predecessor finishes. The successor can't start until the predecessor finishes.

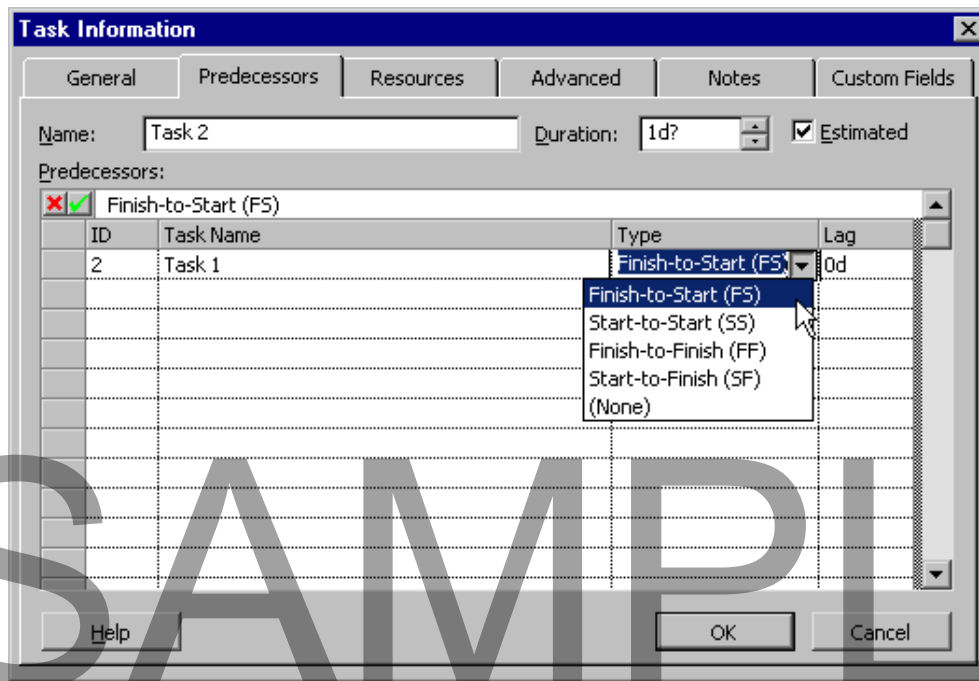
To create a Finish-to-Start (FS) dependency

- There are a few different ways to establish a **finish to start** dependency.
- Use the **Predecessors** tab in the **Task Information** dialog box.
- Click on the down arrow at the right side of the **Task Name** column to select the name of the task you would like to set as the predecessor:

SAMPLE



- Choose the type of dependency from the drop-down menu of the **Type** column:




- Click **OK**

OR in the Gantt Chart view, hover your mouse pointer over the task you would like to make the predecessor until the cursor becomes four arrows pointing outward:

Task Name		15 Dec '03						
		S	S	M	T	W	T	
1	Summary Task							
2	Task 1							
3	Task 2							
4	Task 3							
5	Task 4							

- Click and drag the mouse pointer to the task which you would like to make the successor. The cursor becomes a link symbol and an information box is displayed describing the link you are creating:

Task Name		08 Dec '03							15 Dec '03						
		M	T	W	T	F	S	S	M	T	W	T	F		
1	Summary Task														
2	Task 1														
Finish-to-Start Link															
From Finish Of:		Task 2													
To Start Of:		Task 3													

- Release the mouse and the link will be created
- OR** in the Gantt table view, highlight the tasks you want to link.
- From the main menu, choose **Edit > Link Tasks**
- OR** click on the **Link Tasks** icon  on the **Standard** toolbar
- OR** press the **Ctrl + F2** key combination.

Using Start-to-Finish (SF) Dependencies

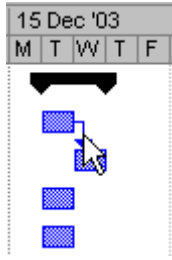
- In a **start-to-finish** dependency, the successor task is completed after its predecessor starts. In other words, the successor task cannot finish until the predecessor task starts. The start to finish relationship is rarely used, although it may be necessary in unusual instances.

To create a Start-to-Finish (SF) dependency

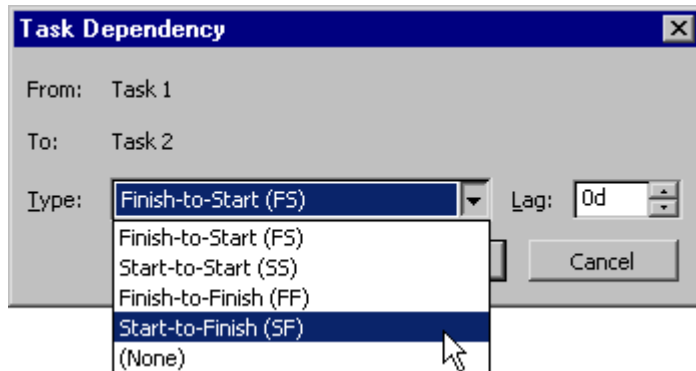
- Use the **Predecessors** tab in the **Task Information** dialog box (as outlined in the previous section) to set this link

OR create a dependency using any one of the methods used to create a finish to start dependency (described in the previous section).

- Double-click on the arrow joining the tasks in the **Gantt Chart** view:



- This will open the **Task Dependency** dialog box:



- Select the **Start-to-Finish (SF)** dependency type from the **Type** drop-down menu.
- Click **OK**.

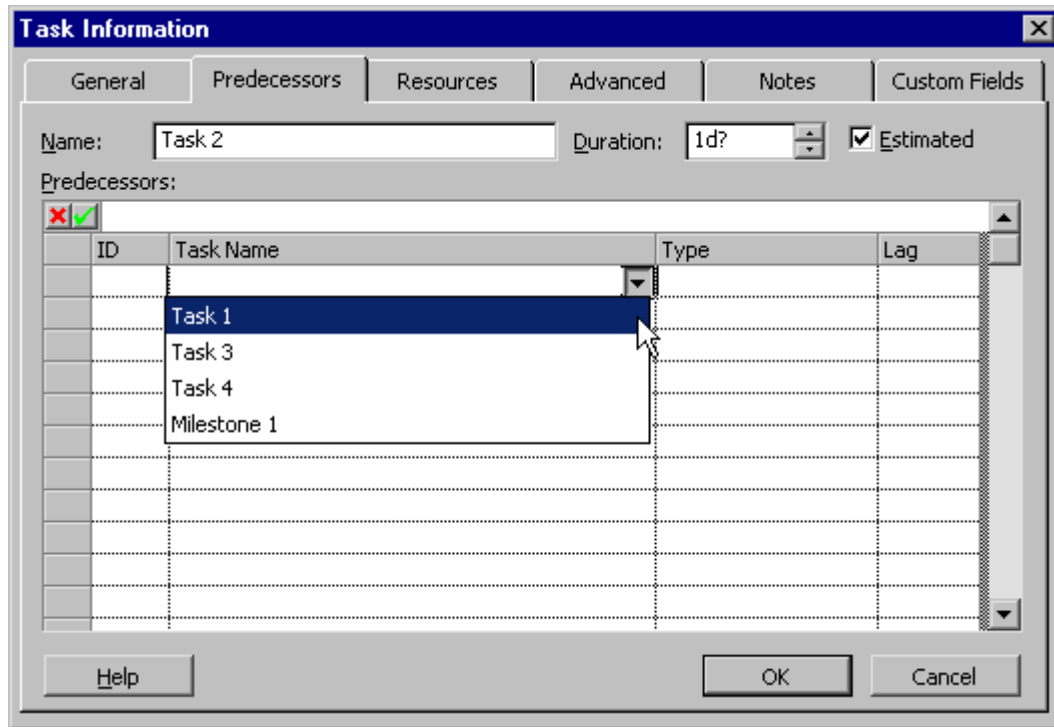
Using Start-to-Start (SS) Dependencies

- In a start-to-start relationship, the successor can't start until the predecessor starts. The tasks can happen simultaneously, but the predecessor needs to have started in order for the successor to start.

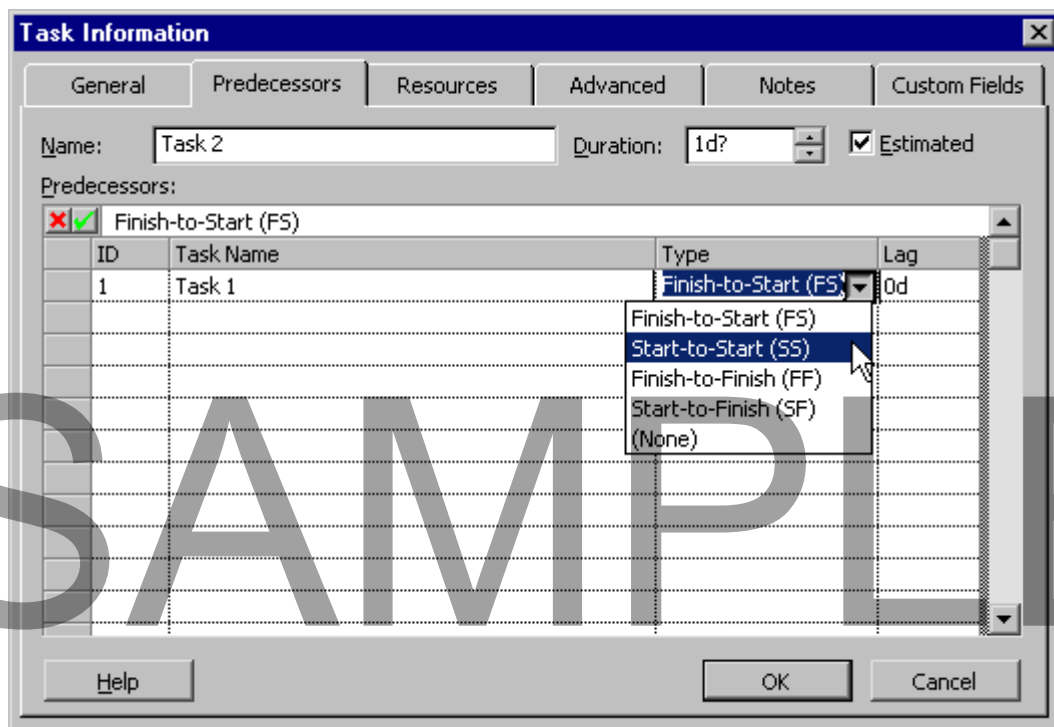
To create a Start-to-Start (SS) dependency

- There are a few different ways to establish a **start to start** dependency.
- Use the **Predecessors** tab in the **Task Information** dialog box.
- Click on the down arrow at the right side of the **Task Name** column to select the name of the task you would like to set as the predecessor:

SAMPLE



- Choose the **Start-to-Start** dependency from the drop-down menu of the **Type** column:



- Click **OK**

OR in the Gantt Chart view, hover your mouse pointer over the task you would like to make the predecessor until the cursor becomes four arrows pointing outward:

	i	Task Name	15 Dec '03						
			S	M	T	W	T	F	
1		Summary Task							
2		Task 1							
3		Task 2							
4		Task 3							
5		Task 4							

- Click and drag the mouse pointer to the task which you would like to make the successor. The cursor becomes a link symbol and an information box is displayed describing the link you are creating. By default, a **Finish-to-Start** dependency is created. This can be changed once the link has been made:

	i	Task Name	Dec '03					15 Dec '03				
			T	W	T	F	S	S	M	T	W	T
1		Summary Task										
2		Task 1										

Finish-to-Start Link	
From Finish Of:	Task 2
To Start Of:	Task 3

- Release the mouse and the link will be created.
- Double-click on the line linking the tasks:

15 Dec '03						
M	T	W	T	F		

- This will open the **Task Dependency** dialog box where you can modify the dependency type:

Task Dependency [X]

From: Task 1

To: Task 2

Type: Start-to-Start (SS)

Lag: 0d

Cancel

- Click **OK**.

Using Finish-to-Finish (FF) Dependencies

- In a finish-to-finish relationship, the successor can't finish until the predecessor finishes. The tasks can happen simultaneously, but the predecessor has to have finished in order for the successor to finish.

SAMPLE

End of the preview sample



This sample is approximately half of the full course. Please see the table of contents at the beginning of this document to see the full list of topics covered in the full course.

To purchase the rights to use the full training manuals at your training centre please see our web site at:

<http://www.cctglobal.com>

A courseware licence allows you to make unlimited copies for use at your training centre.

An advertisement for 'The IT Computer Courseware Library'. It features a dark red header with the title and a subtitle. Below this is a light grey box with a list of features. To the right of the text is a photograph of a diverse group of people. The features listed are: 'GET THE RIGHTS TO A COMPLETE LIBRARY OF TRAINING COURSES INCLUDING ALL THE MAJOR APPLICATIONS', 'HIGH QUALITY, LOW COST COURSES', 'ADD YOUR OWN NAME AND LOGOS', 'PRINT AS MANY COPIES AS YOU NEED', and 'INTRANET VERSION ALSO AVAILABLE'.

The IT Computer Courseware Library
A complete library of quality training courses

Includes Windows 7 and Office 2010 Courseware

- ▶ GET THE RIGHTS TO A COMPLETE LIBRARY OF TRAINING COURSES INCLUDING ALL THE MAJOR APPLICATIONS
- ▶ HIGH QUALITY, LOW COST COURSES
- ▶ ADD YOUR OWN NAME AND LOGOS
- ▶ PRINT AS MANY COPIES AS YOU NEED
- ▶ INTRANET VERSION ALSO AVAILABLE

In addition you get HTML formatted versions of each course, included with our printable courseware.

Invest in a complete Computer Courseware Library, including Windows 7 & Office 2010

The most cost effective courseware solution for your IT training needs. Get ALL our courses, and all new courses released within 12 months.

Over
7,000
Web Pages

Included when you purchase
the 'IT Courseware Library'.

SAMPLE