

Project 2003

Workbook - 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.....	4
INTRODUCTION TO MICROSOFT PROJECT 2003.....	5
THE PROJECT 2003 ENVIRONMENT.....	5
USING THE TASK PANE	6
SHOWING AND HIDING TOOLBARS	13
USING THE PROJECT GUIDE.....	16
DEFINING THE PROJECT	19
OPENING A NEW PROJECT.....	19
USING FILE PROPERTIES	19
ENTERING START AND FINISH DATES	20
ESTABLISHING A PROJECT CALENDAR	21
SAVING	25
QUITTING AND CLOSING	25
TASKS	27
ENTERING TASKS.....	27
ENTERING SUBTASKS	27
ENTERING TASK DURATIONS.....	28
CREATING A SUMMARY TASK	29
USING RECURRING TASKS.....	30
USING TASK NOTES.....	31
ASSIGNING MILESTONES	32
ENTERING CONSTRAINTS	33
EDITING TASKS.....	34
DELETING TASKS	35
MOVING TASKS.....	36
CREATING DEPENDENCIES	36
RESOURCES.....	41
CREATING A RESOURCE LIST	41
ENTERING WORKING TIME.....	42
ENTERING COSTS	42
ENTERING NOTES	43
ASSIGNING RESOURCES.....	44
VIEWS.....	46
INTRODUCTION TO VIEWS	46
USING THE CALENDAR VIEW	47
USING THE GANTT CHART VIEW	48
USING THE NETWORK DIAGRAM VIEW	50
USING THE TASK USAGE VIEW	51
USING THE RESOURCE GRAPH VIEW.....	53
PRINTING REPORTS.....	55
USING PRINT PREVIEW	55
UNDERSTANDING PAGE SETUP.....	55
UNDERSTANDING THE PRINT DIALOG BOX	58
UNDERSTANDING THE DIFFERENT TYPES OF REPORTS.....	60
THE PROJECT GUIDE FOR PRINTING WIZARD.....	66

Installing the Sample Files

- Use Windows Explorer to create a folder called **Project 2003 Foundation Samples**, in the **My Documents** folder.
- Copy the sample files for this course 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.

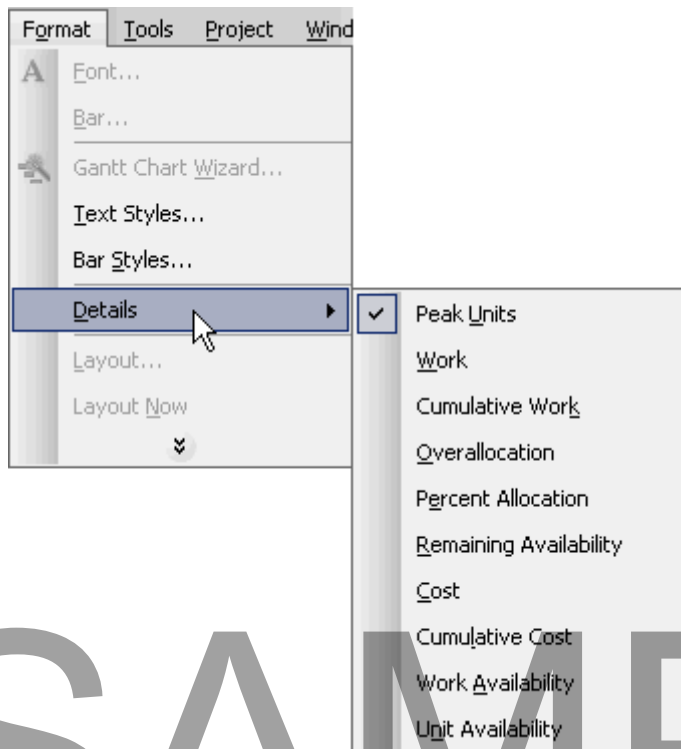
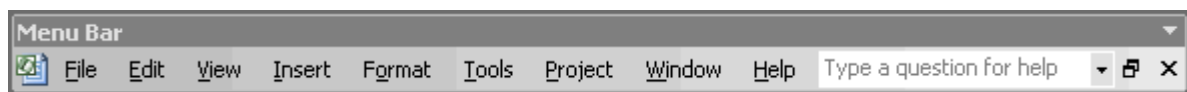
SAMPLE

Introduction to Microsoft Project 2003

The Project 2003 Environment

Using the Main Menu

- Open **Project 2003**.
- From the main menu, select **Format**. Observe the different options available in the drop down menu.
- Notice how the menu is not fully expanded. Click on the down arrows to expand it:



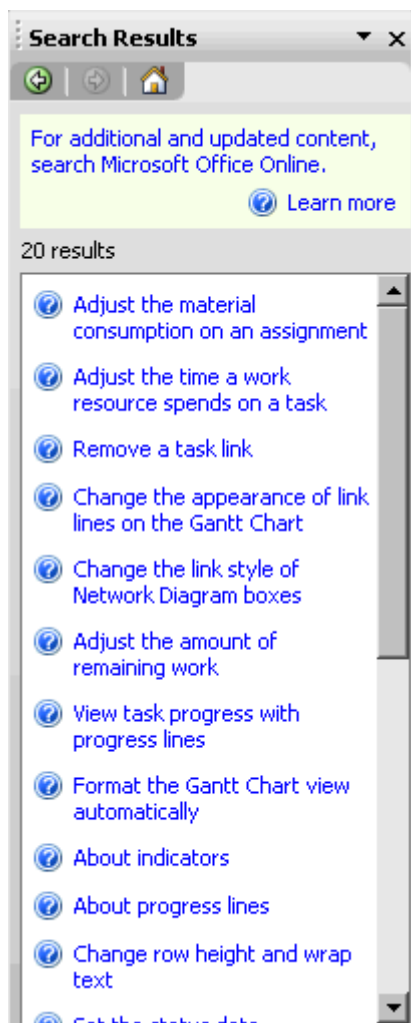
- Experiment further with the main menu by clicking on various menus and observing the options available in each.
- Exit Project 2003 without saving any changes.

Using the Ask a Question Box

- Open **Project 2003**.
- Click inside the **Ask a Question Box** and type *use contour lines*:



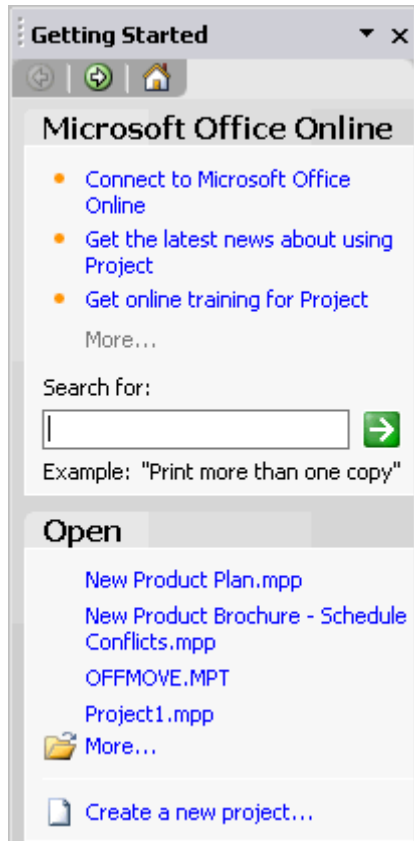
- Press **Enter**.
- Browse the related topics in the **Search Results** task pane:



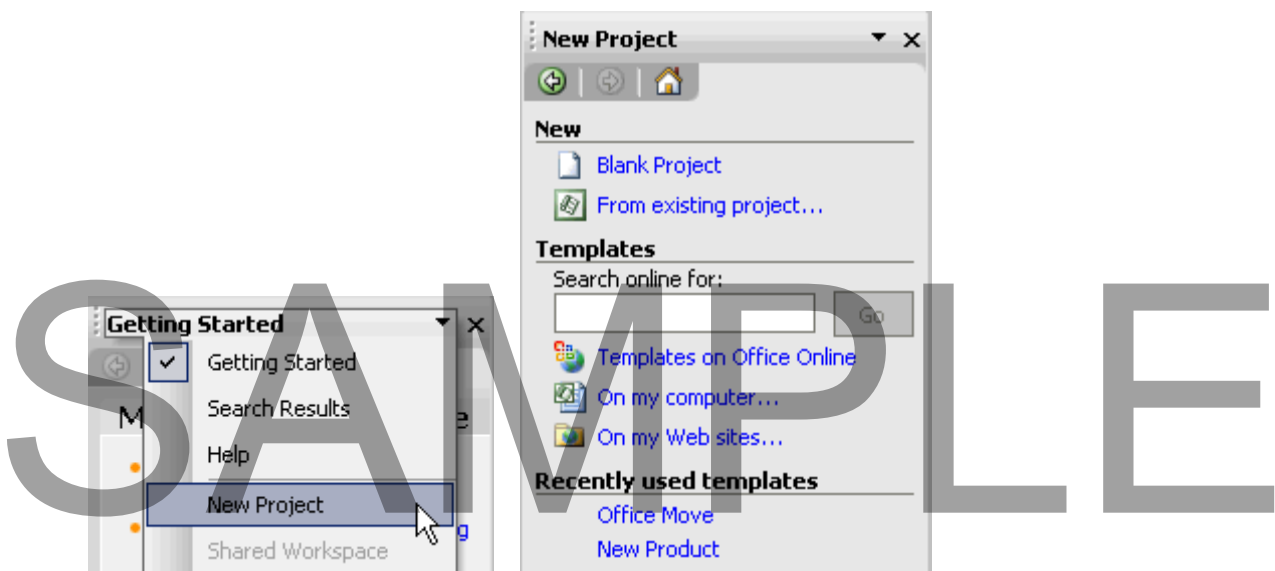
- Click on **About progress lines** to open the **Microsoft Project Help** window.
- Close the Microsoft Project Help window.
- Exit Project 2003 without saving any changes.

Using the Task Pane

- Open Project 2003.
- If the **Getting Started task pane** does not open automatically, from the main menu, choose **View > Toolbars > Task Pane**:



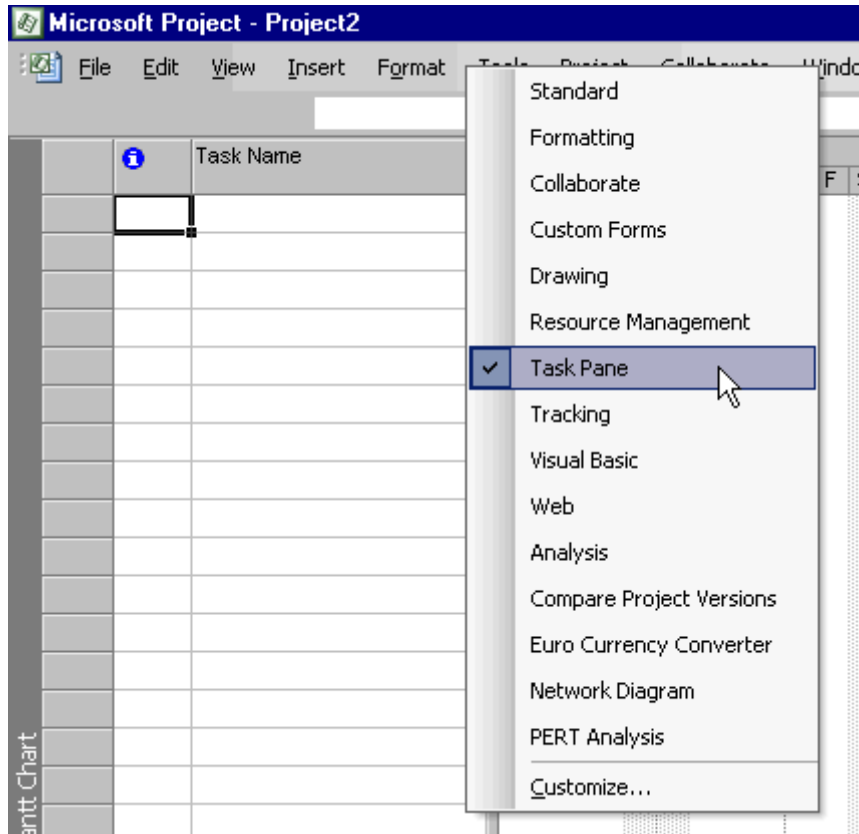
- Click on the **Other Task Panes** down arrow on the top right-hand side of the task pane. Select **New Project** to open the **New Project** pane:



- Click on **Blank Project** to open a new project with nothing in it.
- Notice how the task pane closes automatically once a new project has started.

Showing or hiding the Task Pane

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

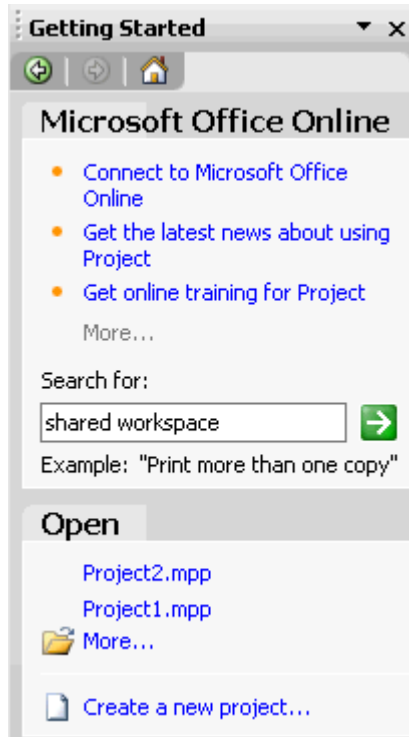


- To hide the task pane, right click on any toolbar and deselect **Task Pane**
OR simply click on the "x" at the top right hand corner of the task pane.

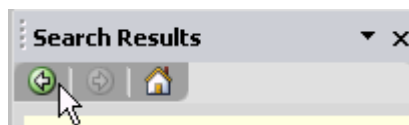
Using the Getting Started Pane

- Open the task pane.
- Click on the **Other Task Panes** down arrow and select **Getting Started**.
- In the **Search for** field, type '**shared workspace**': Click on the green arrow to start the search:

SAMPLE



- This will open the **Search Results** task pane where topics related to “**shared workspace**” are displayed.
- Use the **green back arrow** to return to the **Getting Started** task pane:

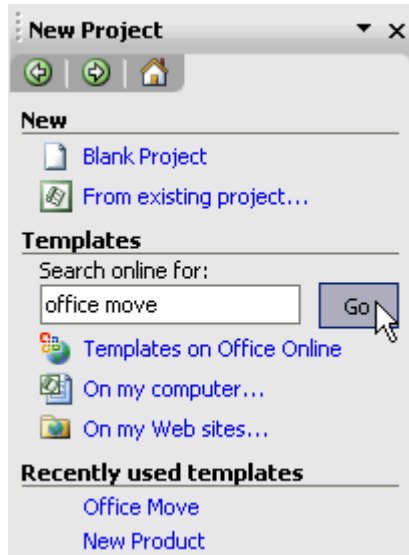


- Click on the **Create a new project** link to display the **New Project** pane.

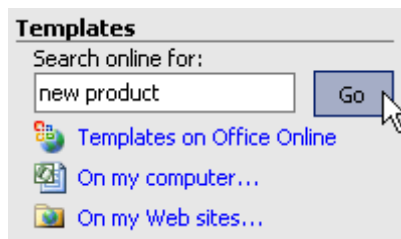
Using the New Project Pane

- If the **New Project** pane is not already displayed, click on the **Other Task Panes** down arrow and select **New Project**:

SAMPLE

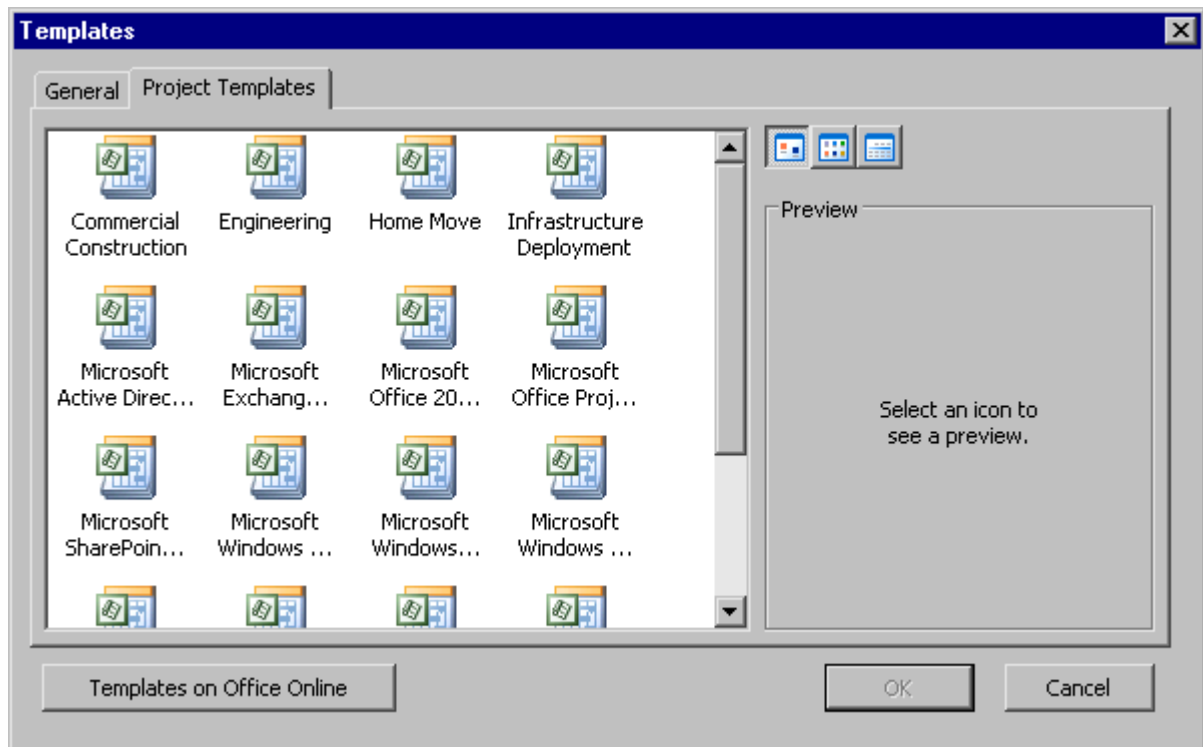


- Project 2003 now allows you to download templates from **Microsoft Office Online**. (You must have internet access for this feature to work). Type "**new product**" in the **Search online for** text box and click on **Go**:



- View the results returned to you from Microsoft Office Online. Click on the **green back arrow** to return to the **New Project** task pane.
- Project has templates for many different types of projects already made. They can be a great place to start a project. Click on **On my computer** to open the **Templates** dialog box. Click on the **Project Templates** tab:

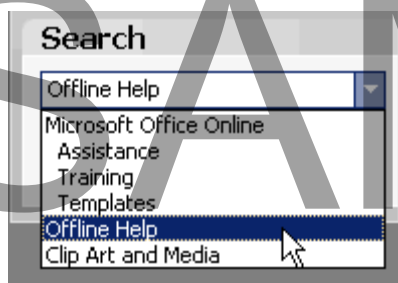
SAMPLE



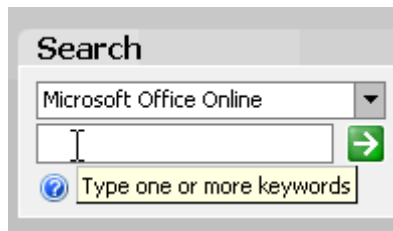
- Click on **Commercial Construction**.
- Click **OK**.
- Notice how Project opens a new project that would be suitable to base a commercial construction project on. Briefly scan through the project.
- Close the project without saving.

Using the Search Results Pane

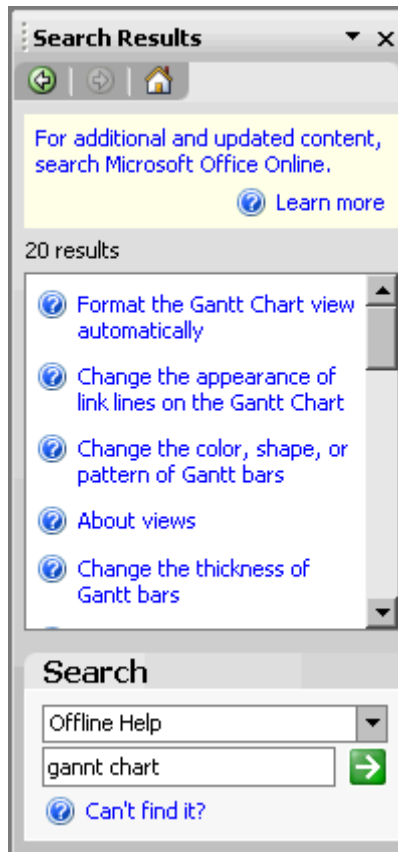
- Open a new project by selecting **File > New** from the main menu.
- Use the **Other Task Panes** down arrow and select **Search Results**.
- In the **Search** area, use the drop-down menu to choose where you would like Project to look for the information and select **Offline Help**:



- Type "**gantt chart**" into the text box, then click on the green arrow:



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



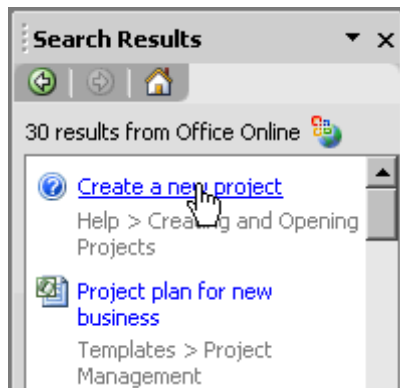
- Click on one of the links to display the **Microsoft Project Help** window.
- Close the **Microsoft Project Help** window.

Using the Project Help Pane

- If the Project Help task pane is not already visible, from the main menu, select **Help > Microsoft Project Help**.
- Type "**starting a new project**" 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.
- Click on **Create a new project** to open the Microsoft Project Help window:

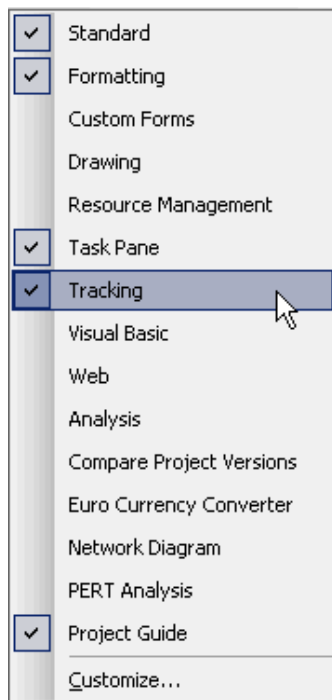


- Scan through the information provided. Close the **Microsoft Project Help** window.
- Close the task pane.
- Close the file without saving any changes.
- Exit Project 2003.

Showing and Hiding Toolbars

- Open Project 2003.
- From the main menu, choose **View > Toolbars > Tracking** to show the **Tracking** toolbar:

SAMPLE

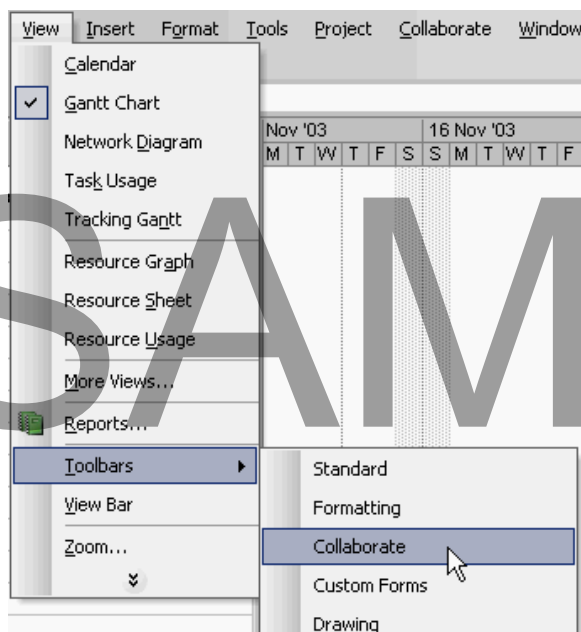


Note: A check mark appears beside a toolbar if it is shown.

- To hide the **Tracking** toolbar, right-click on any toolbar and deselect **Tracking** from the listed toolbars.

Moving a Toolbar

- From the main menu, select **View > Toolbars > Collaborate** to display the **Collaborate** toolbar:



- Hover your mouse over the left edge of the toolbar. Your cursor will change to the **move cursor**. Click your mouse and drag it to the middle of the



Project window:



- The toolbar is now sitting independently in the centre of the Project window.
- Close the toolbar by clicking on the "x" on the top right corner of the toolbar.

Using the Standard Toolbar

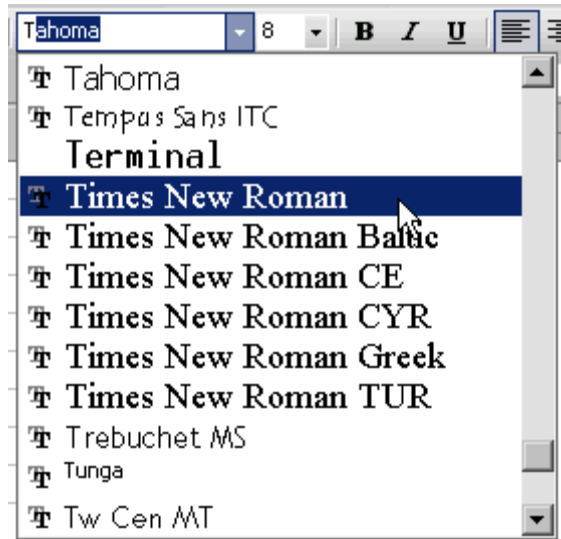
- Open the **Standard** toolbar by selecting **View > Toolbars > Standard**.
- Hover your mouse over each of the buttons and observe the descriptive tool tip that appears to help you identify it.
- Now let's use a couple of the buttons to get the general idea of how the toolbar works.


- Click on the **New** button . A brand new blank project is created.
- Now click on the **Task Information**  button. The **Task Information** dialog box is opened.
- Click **Cancel** to close the dialog box.
- From the main menu, select **File > Close** to close the blank project.
- You do not need to save any changes.

Using the Formatting Toolbar

- Open a new blank project by clicking on the **New** button on the **Standard** toolbar.
- Open the **Formatting** toolbar by selecting **View > Toolbars > Formatting**.
- Hover your mouse over each of the buttons and observe the descriptive tool tip that appears to help you identify it.
- Now let's use a couple of the buttons to get the general idea of how the toolbar works.
- Click on the down arrow of the **Font** drop down menu:

SAMPLE



- Scroll through the list of fonts until you find **Times New Roman**. Highlight and click on it to change the font.
- Now click on the **Gantt Chart Wizard** button  to start the Gantt Chart Wizard.
- Click **Cancel** to close the Gantt Chart Wizard.
- Close the file without saving any changes.

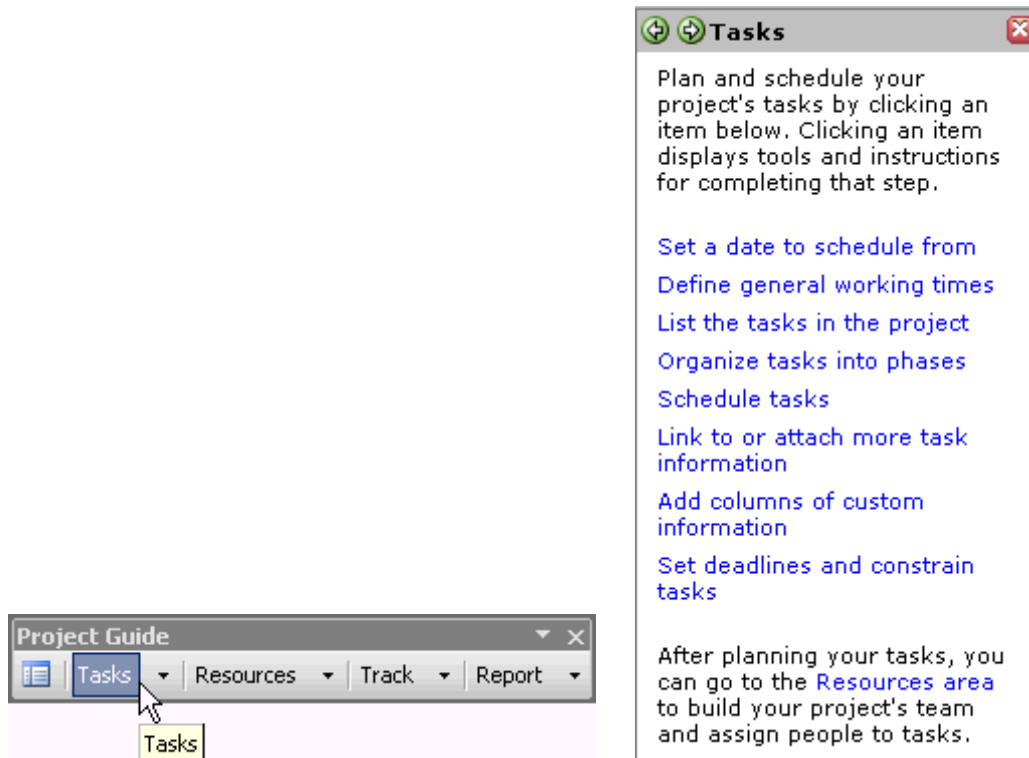
Using the Project Guide

- Open Project 2003.
- Display the **Project Guide** toolbar by selecting **View > Toolbars > Project Guide** from the main menu.

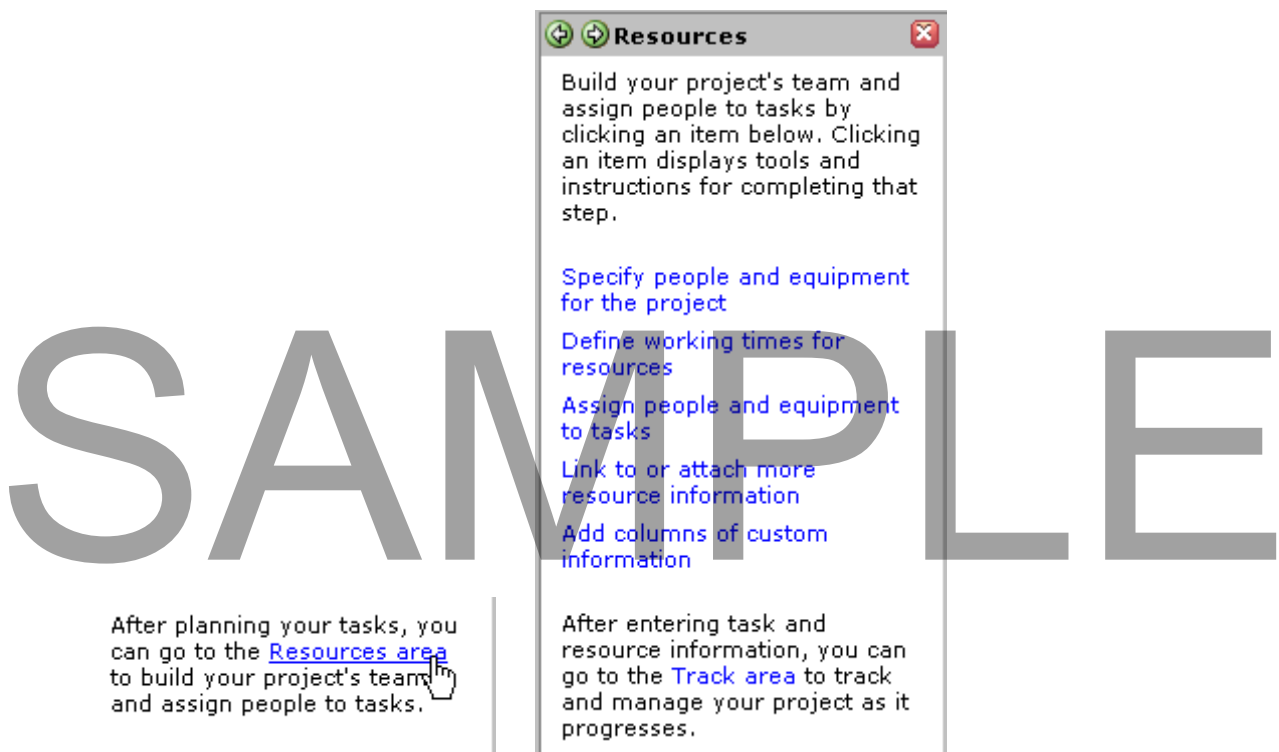
Note: If the Project Guide toolbar is not on the drop down menu, select **Tools > Options** from the main menu. Click on the **Interface** tab and select **Display Project Guide**. Click **OK** to close the **Options** dialog box. The Project Guide will now be listed in the **Toolbars** drop down menu.

SAMPLE

- On the **Project Guide** toolbar, click on **Tasks** to display the **Tasks** pane:

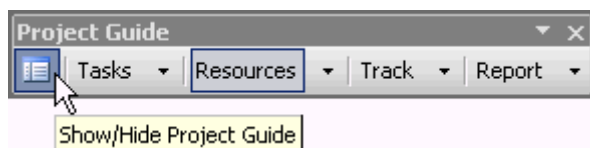


- Use the **link** area at the bottom of the **Tasks** pane to display the **Resources** pane:



- Experiment by clicking on some of the guide items to go to the specific **Project Guide** windows.

- Click on the **Show/Hide Project Guide** icon on the **Project Guide** toolbar to hide the Project Guide:



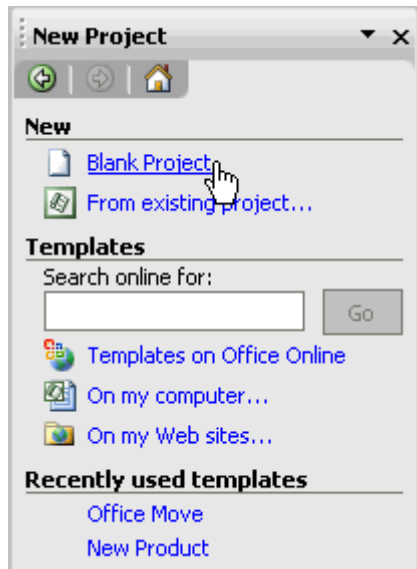
- Hide the **Project Guide** toolbar by selecting **View > Toolbars > Project Guide** from the main menu.
- Exit Project 2003.

SAMPLE

Defining the Project

Opening a New Project

- Start Project 2003.
- From the main menu, choose **File > New**.
- Click on **Blank Project** in the **New Project** task pane:

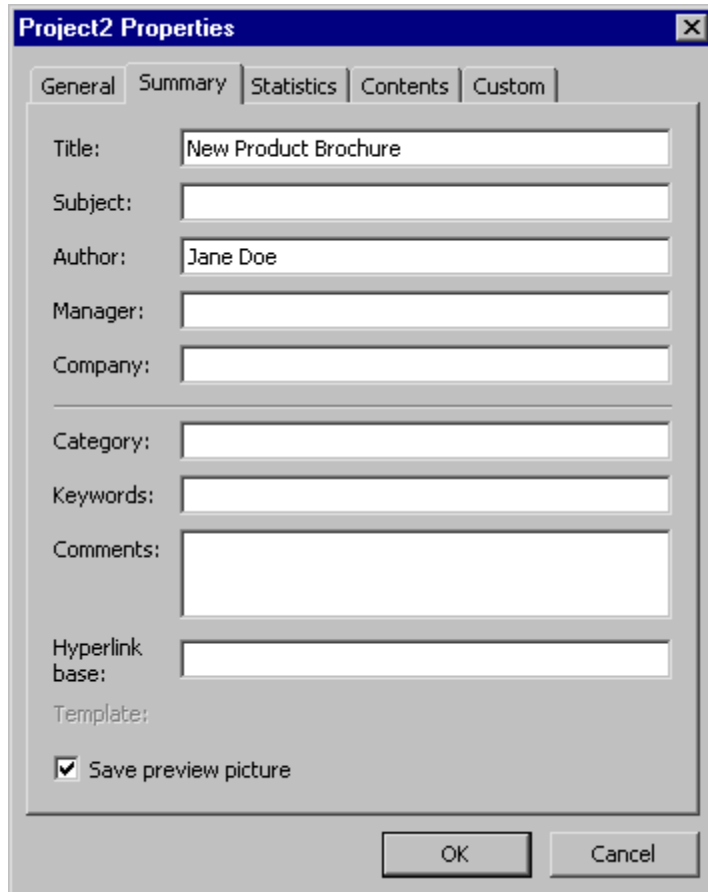


- Keep the project open for the next exercise.

Using File Properties

- Using a blank project, from the main menu, choose **File > Properties**.
- The **File Properties** dialog box is displayed.
- Click on the **Summary** tab, and type ***New Product Brochure*** in the **Title** field.
- Type your name in the **Author** field:

SAMPLE



The screenshot shows the 'Project2 Properties' dialog box with the 'General' tab selected. The dialog has a title bar with a close button (X). Below the title bar are five tabs: 'General', 'Summary', 'Statistics', 'Contents', and 'Custom'. The 'General' tab contains the following fields and controls:

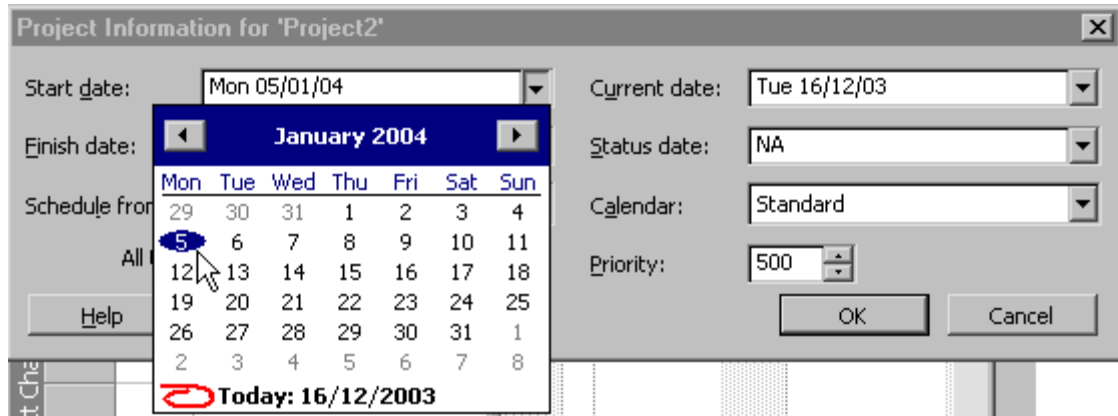
- Title: Text box containing 'New Product Brochure'
- Subject: Empty text box
- Author: Text box containing 'Jane Doe'
- Manager: Empty text box
- Company: Empty text box
- Category: Empty text box
- Keywords: Empty text box
- Comments: Large empty text area
- Hyperlink base: Empty text box
- Template: Empty text box
- A checked checkbox labeled 'Save preview picture'
- 'OK' and 'Cancel' buttons at the bottom right.

- Click on the **Statistics** tab to see 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.
- Click **OK** to close the **Project Properties** dialog box.
- Keep the project open for the next exercise.

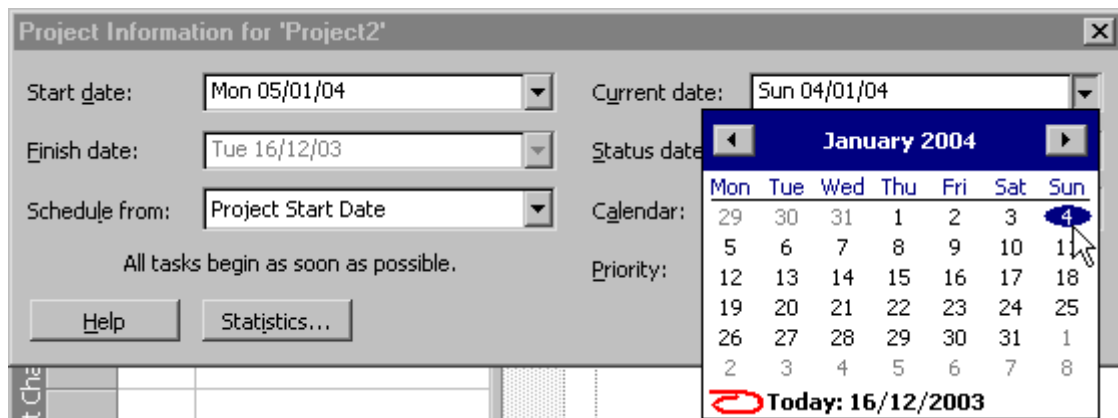
Entering Start and Finish Dates

- Open the **Project Information** dialog box by selecting from the main menu **Project > Project Information**.
- Use the drop-down calendar in the **Start date** field to select **Mon 05/01/04**:

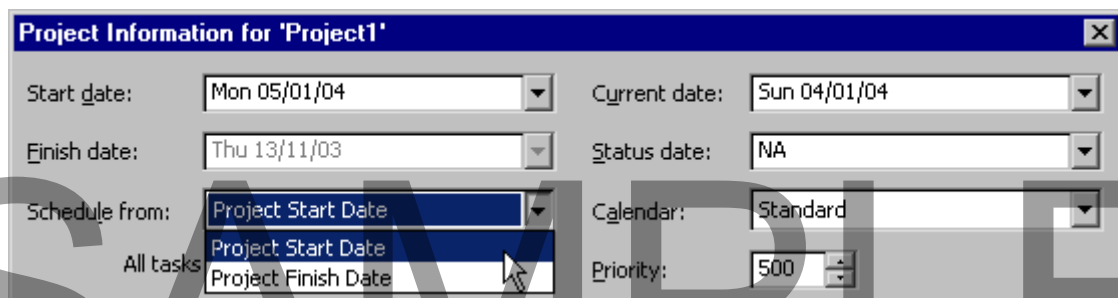
SAMPLE



- Use the drop-down calendar in the **Current date** field to change the date to **Sun 04/01/04**:



- Be sure that **Project Start Date** is selected from the **Schedule from** drop-down menu (**Project Start Date** is the default):

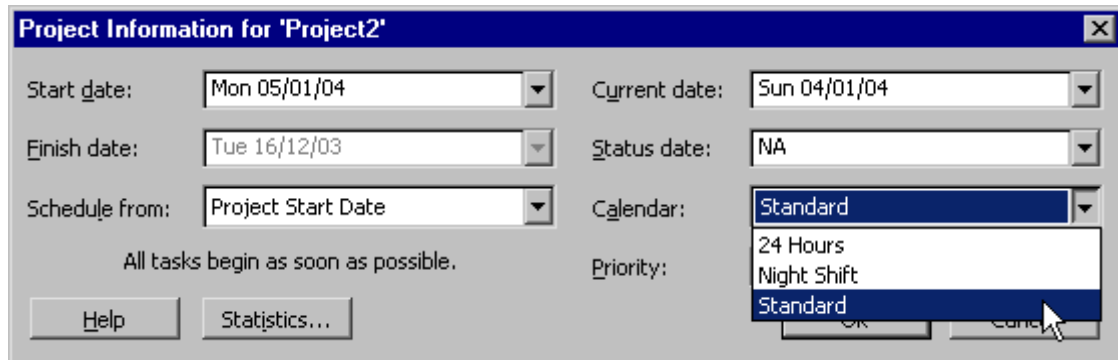


- Leave the other fields (**Current date**, **Status date**, **Calendar**, and **Priority**) as the default values.
- Click **OK**. Project will close the dialog box and save the information for you.
- Leave the project open for the next exercise.

Establishing a Project Calendar

- From the main menu, select **Project > Project Information**.

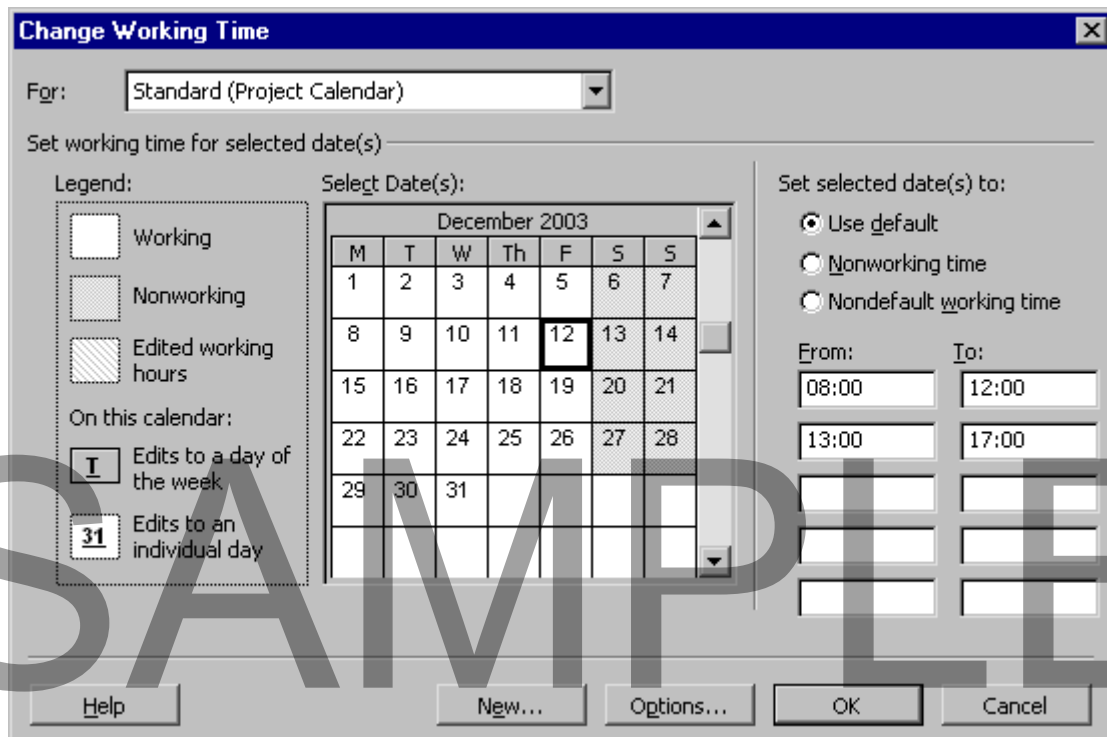
- Confirm that **Standard** is selected from the **Calendar** drop-down menu in the **Project Information** dialog box:



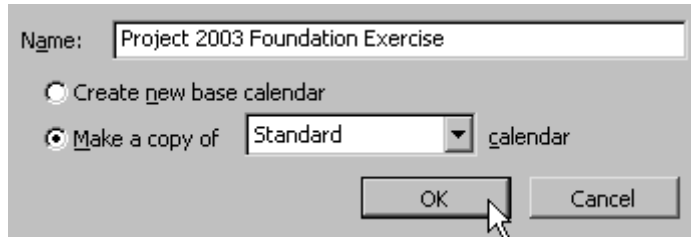
- Click **OK** to close the **Project Information** dialog box and save the project information entered.
- Leave the project open for the next exercise.

Making a New Calendar

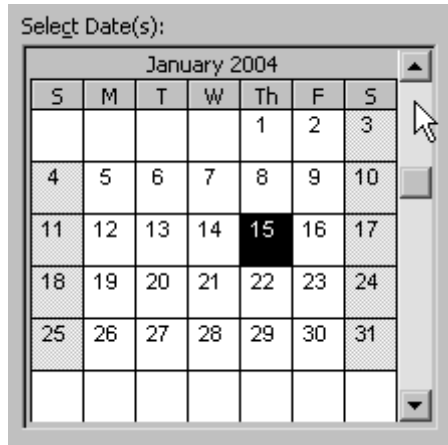
- To make a new calendar, from the main menu, choose **Tools > Change Working Time**. The **Change Working Time** dialog box will open:



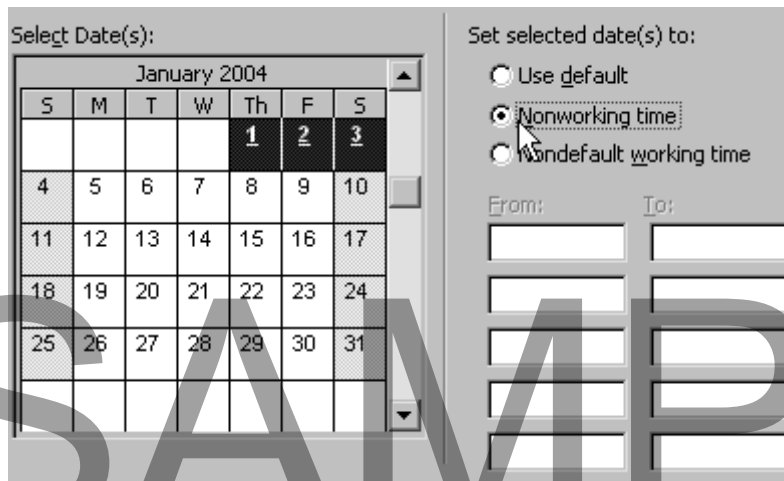
- Click on **New**. The **Create New Base Calendar** dialog box will open.
- Enter **Project 2003 Foundation Exercise** as a descriptive name.
- Click **OK**:



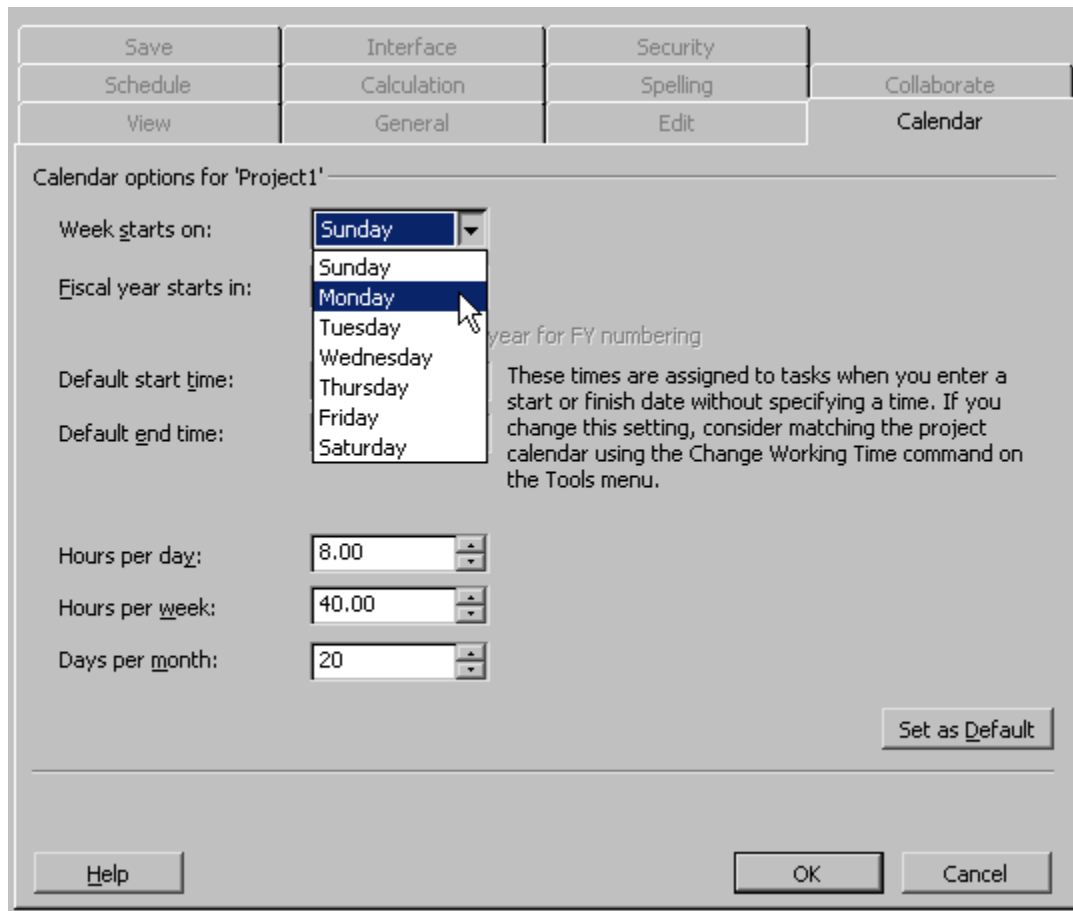
- Now let's pretend that we need to book some time off for holidays. Use the scroll bar to the right of the calendar in the **Select Date(s)** area of the **Change Working Time** dialog box to find **January 2004**:



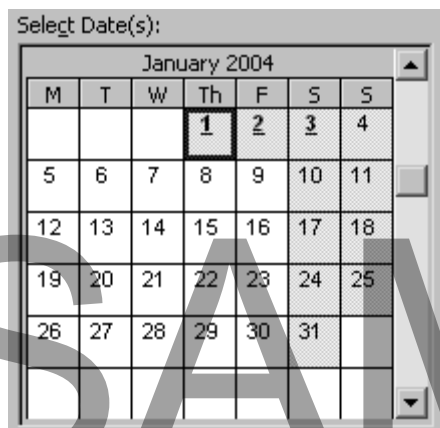
- Highlight the **1st, 2nd and 3rd** of **January 2004** and then select the **Nonworking time** radio button from the **Set selected date(s) to** area:



- Click anywhere on the Calendar and notice that the **1st, 2nd and 3rd** are now greyed out as non-working time.
- Now let's change some of the options on the newly created calendar.
- Click on **Options** to open the **Calendar** tab in the **Options** dialog box. Change the first day of the week from Sunday to Monday by selecting **Monday** from the **Week starts on** drop down menu:



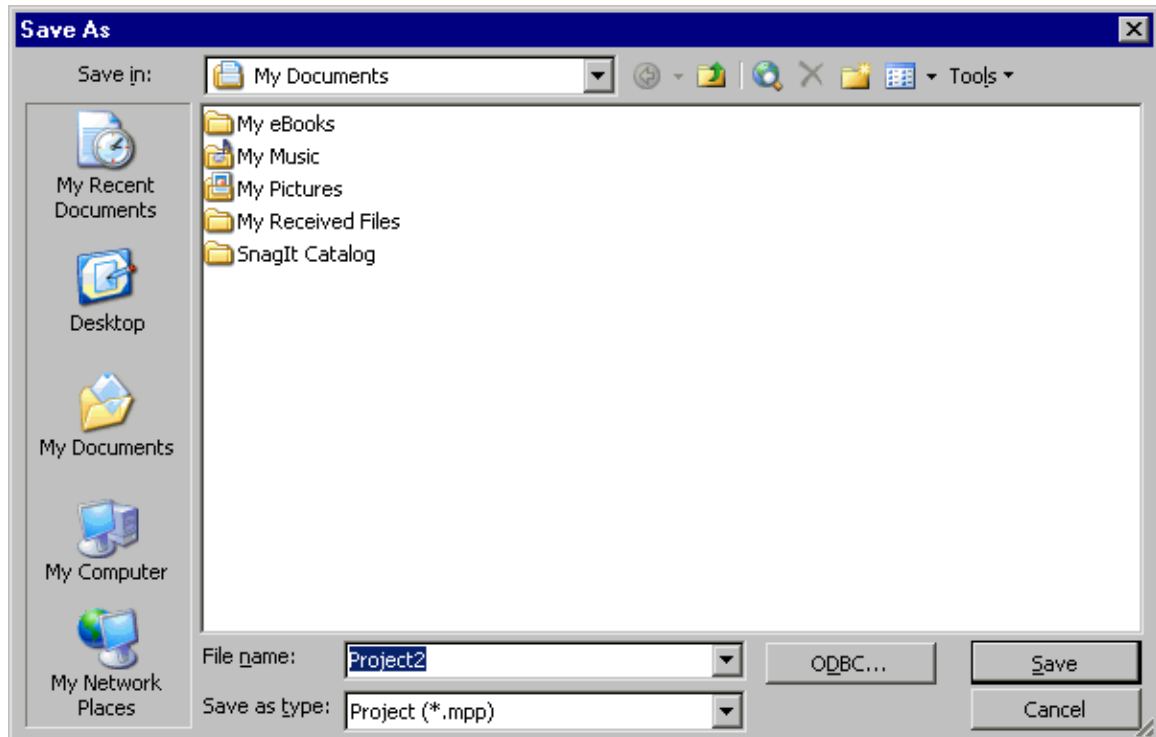
- Click **OK** to close the **Options** dialog box.
- Notice how the calendar has now made Monday the first day of the week:



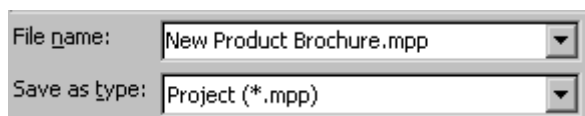
- Click **OK** to close the **Change Working Time** dialog box.
- Now will select our newly created Calendar as the calendar to use for our project. From the main menu, select **Project > Project Information**.
- Click on the **Calendar** down arrow and see how the new calendar has been added to the list. Click on **Project 2003 Foundation Exercise** to select it.
- Click **OK** to close the dialog box and save the changes.
- Keep the project open for the next exercise.

Saving

- From the main menu, choose **File** > **Save** to open the **Save As** dialog box:



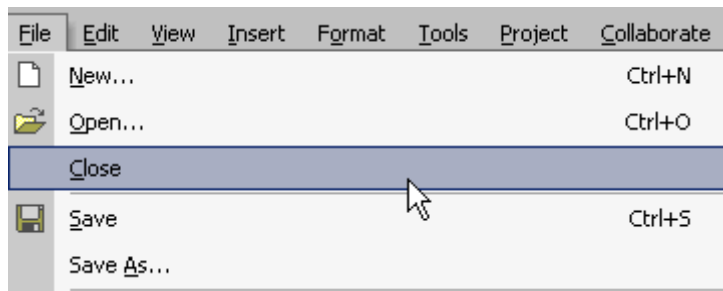
- Browse to find your **Project 2003 Foundation Samples** folder. Double-click on it.
- Type ***New Product Brochure*** in the **File name** field:



- Click **Save**.
- Leave the project open for the next exercise.

Quitting and Closing

- From the main menu, choose **File** > **Close** to close your project:



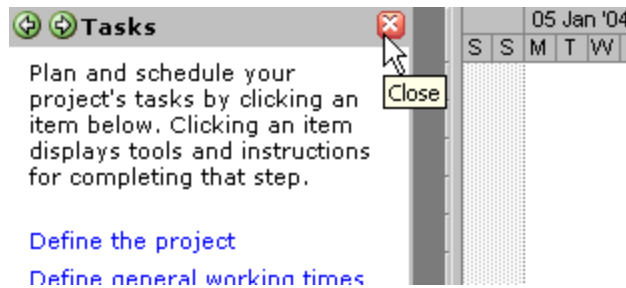
- From the main menu, choose **File** > **Exit** to exit Project 2003.

SAMPLE

Tasks

Entering Tasks

- Start Project 2003.
- Open ***New Product Brochure.mpp*** from your **Project 2003 Foundation Samples** folder in My Documents.
- Close the **Project Guide**:

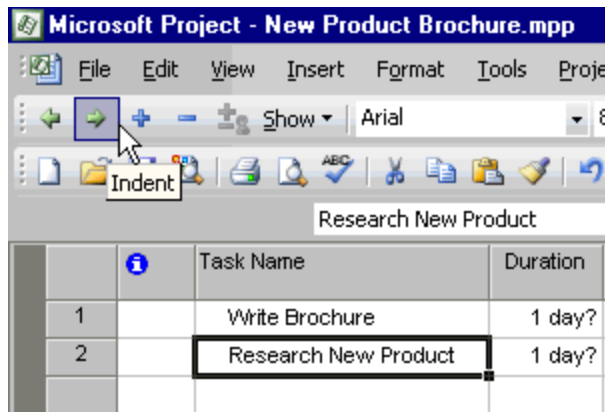


- If you are not already in the Gantt Chart view, from the main menu, select **View > Gantt Chart**.
- Click in the first row of the **Task Name** column of the **Gantt** table.
- Type ***Write Brochure***.
- Press **Return**.
- Leave the **Duration**, **Start** and **Finish** dates as is:

		Task Name	Duration	Start	Finish
1		Write Brochure	1 day?	Mon 05/01/04	Mon 05/01/04

Entering Subtasks

- Click in the **second row** of the Gantt table, underneath "Write Brochure".
- Type ***Research New Product***.
- Press **Return**.
- Type ***Create an Outline***.
- Press **Return**.
- Type ***Write a Rough Draft***.
- Press **Return**.
- Type ***Edit Rough Draft***.
- Press **Return**.
- **Highlight** "Research New Product" by clicking on it.
- Click on the **Indent** icon on the **Formatting** toolbar to make it a subtask:



- Now highlight rows 3, 4, and 5.
- Click on the **Indent** icon on the **Formatting** toolbar.

Entering Task Durations

- Use the arrow buttons on the right end of the **Duration** box to adjust the duration of the **Research New Product** task to **2 days**:

	i	Task Name	Duration	Sta
1		Write Brochure	1 day?	Mon 05
2		Research New Product	2 days	Mon 05
3		Create an Outline	1 day?	Mon 05

- Because you manually changed the duration of the task, the question mark which indicated an estimated duration disappeared. To specify that the changed duration is still an estimate, click on the **Write Brochure** task. Click on the **Task Information** button on the **Standard** toolbar. Recheck the **Estimated** box in the **Task Information** dialog box:

SAMPLE

- Click **OK**.
- Notice that the estimated duration of the Write Brochure summary task has changed as well, as the duration of a summary task is based on the durations of the subtasks:

	i	Task Name	Duration	Sta	05 Jan '04
					M T W T F
1		☐ Write Brochure	2 days?	Mon 05	■
2		Research New Product	2 days?	Mon 05	■ ■
3		Create an Outline	1 day?	Mon 05	■
4		Write a Rough Draft	1 day?	Mon 05	■
5		Edit Rough Draft	1 day?	Mon 05	■

Creating a Summary Task

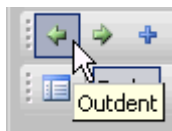
- In row 6, type *Prepare through desktop publishing*.
- Press **Return**.
- In row 7, type *Get quotes from printers*.
- Press **Return**.
- In row 8, type *Get printed*.
- Press **Return**.
- Insert a row by highlighting row 6:

	Task Name	Duration	Start
1	<input type="checkbox"/> Write Brochure	1 day?	Mon 05/01/04
2	Research New Product	1 day?	Mon 05/01/04
3	Create an Outline	1 day?	Mon 05/01/04
4	Write a Rough Draft	1 day?	Mon 05/01/04
5	Edit Rough Draft	1 day?	Mon 05/01/04
6	<input checked="" type="checkbox"/> Prepare through desktop pub	1 day?	Mon 05/01/04
7	Get quotes from printers	1 day?	Mon 05/01/04
8	Get Printed	1 day?	Mon 05/01/04

- From the main menu, choose **Insert > New Task**.
- Type **Print Brochure**. Accept the new task name by clicking on the check mark in the entry bar:



- With the task still highlighted, click on the **Outdent** button on the **Formatting** toolbar:



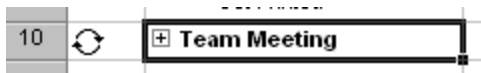
- Notice how **Print Brochure** becomes a summary task and the three tasks below it become its subtasks.

- We will now enter the remaining tasks in our project.
- In row **10**, type **Distribute Brochure**.
- Press **Return**.
- In row **11**, type **Create mailing list**.
- Press **Return**.
- In row **12**, type **Do mass mail out**.
- Press **Return**.
- Highlight row **10** and click on the **Outdent** button on the **Formatting** toolbar.
- From the main menu, select **File > Save**.

Using Recurring Tasks

- Highlight row **10**.
- From the main menu, choose **Insert > Recurring Task**.
- The **Recurring Task Information** dialog box opens:

- Enter **Team Meeting** in the **Task Name** box.
- Enter **1h** in the **Duration** box.
- Select the **Daily** radio button in the **Recurrence pattern** area and the **Workday** radio button.
- In the **Range of recurrence** section select the **End after** radio button and choose **3**.
- Click **OK** to return to the Gantt Chart view.
- Click on the **Outdent** button on the **Formatting** toolbar.
- Notice the recurring task symbol in the **Indicator** column:



- Expand the **Team Meeting** task by clicking on the + symbol.

Using Task Notes

- Double-click on the **Print Brochure** task and select the **Notes** tab in the **Task Information** dialog box:

SAMPLE

Summary Task Information

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


Name: Duration: Estimated

Notes:



Remember to ask Kate for recommended printers

Help OK Cancel

- Type ***Remember to ask Kate for recommended printers.***
- 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:

6		<input type="checkbox"/> Print Brochure	1 day? Mon 0
7		Prepare through desktop	1 day? Mon 0
8		Get quotes from printers	1 day? Mon 0
9		Get Printed	1 day? Mon 0

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

6	 	<input type="checkbox"/> Print Brochure	1 day? Mon 0
7		Prepare through desktop	1 day? Mon 0
8		Get quotes from printers	1 day? Mon 0
9		Get Printed	1 day? Mon 0

Notes: 'Remember to ask Kate for recommended printers'

Assigning Milestones

- Double-click on the **Edit Rough Draft** task to open the **Task Information** dialog box. Select the **Mark task as milestone** checkbox in the **Advanced** tab:

- Click **OK**.
- The task is now marked by a **diamond** in the Gantt Chart view:

		Task Name	Duration	Sta	05 Jan '04
					S M T W T
1		Write Brochure	2 days?	Mon 05	
2		Research New Product	2 days?	Mon 05	
3		Create an Outline	1 day?	Mon 05	
4		Write a Rough Draft	1 day?	Mon 05	
5		Edit Rough Draft	1 day?	Mon 05	◆ 05/01
6		Print Brochure	1 day?	Mon 05	

Entering Constraints

- Double click on the **Print Brochure** task to open the **Task Information** dialog box and click on the **Advanced** tab:

SAMPLE

- Select **Start No Earlier Than** from the **Constraint type** drop-down menu and type **Wed 07/01/04** in the Constraint date field. This will ensure that the printing of the brochure cannot start before 7 January.
- Click **OK**.
- Notice how the tasks have been moved in the Gantt Chart view:

6		Print Brochure	1 day?	Mon 05
7		Prepare through desktop	1 day?	Mon 05
8		Get quotes from printers	1 day?	Mon 05
9		Get printed	1 day?	Mon 05

6		Print Brochure	1 day?	Wed 07
7		Prepare through desktop	1 day?	Wed 07
8		Get quotes from printers	1 day?	Wed 07
9		Get printed	1 day?	Wed 07

Editing Tasks

- Double click on the **Team Meeting 1** task to open the **Task Information** dialog box.
- Change the duration of the meeting to 2 hours by entering **2h** in the **Duration** field:

Moving Tasks

- Highlight row **10** (the **Team Meeting** summary task).
- Place your mouse over the ID number of the task until it becomes a move cursor:

ID	Task Name	Duration	Start
10	Team Meeting	2.13 days	Mon
11	Team Meeting 1	2 hrs	Mon
12	Team Meeting 2	1 hr	Tue
13	Team Meeting 3	1 hr	Wed

- Click and hold your mouse, and drag the cursor until the horizontal grey stripe is above row **1** as illustrated below:

ID	Task Name	Duration	Start
1	Write Brochure	1 day?	Mon
2	Research New Product	1 day?	Mon
3	Create an Outline	1 day?	Mon
4	Write a Rough Draft	1 day?	Mon
5	Edit Rough Draft	1 day?	Mon
6	Print Brochure	1 day?	Wed
7	Prepare through desktop	1 day?	Wed
8	Get quotes from printers	1 day?	Wed
9	Get Printed	1 day?	Wed
10	Team Meeting	2.13 days	Mon
11	Team Meeting 1	2 hrs	Mon
12	Team Meeting 2	1 hr	Tue
13	Team Meeting 3	1 hr	Wed
14	Distribute Brochure	1 day?	Mon

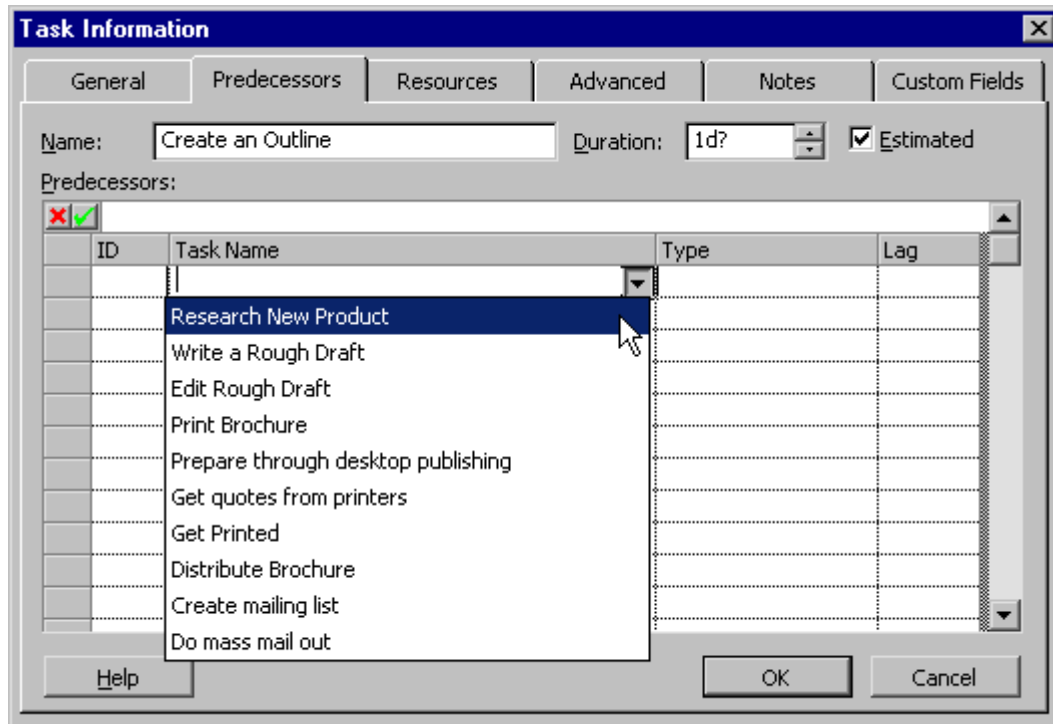
- Notice that all of the subtasks were moved with the summary task.
- From the main menu, select **File > Save**.
- Close **New Product Brochure.mpp**.

Creating Dependencies

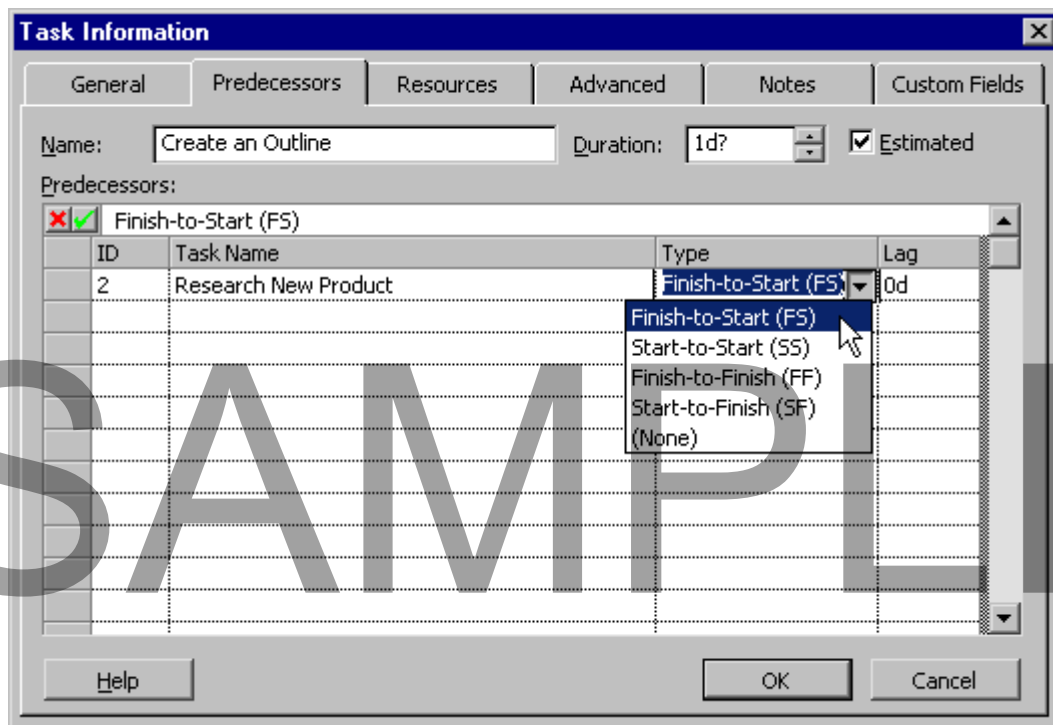
Using Finish-to-Start (FS) Dependencies

- Because most tasks in a project cannot occur concurrently, you must assign dependencies, telling Project that one task cannot start until another finishes or that a task cannot finish until another task finishes etc.
- Open **New Product Brochure.mpp** from the **Project 2003 Foundation Work Folder**.
- Double-click on the **Create an Outline** task to open the **Task Information** dialog box.

- Select "**Research New Product**" from the drop-down list in the **Task Name** column of the **Predecessors** tab:



- Select **Finish-to-Start (FS)** in the **Type** column:



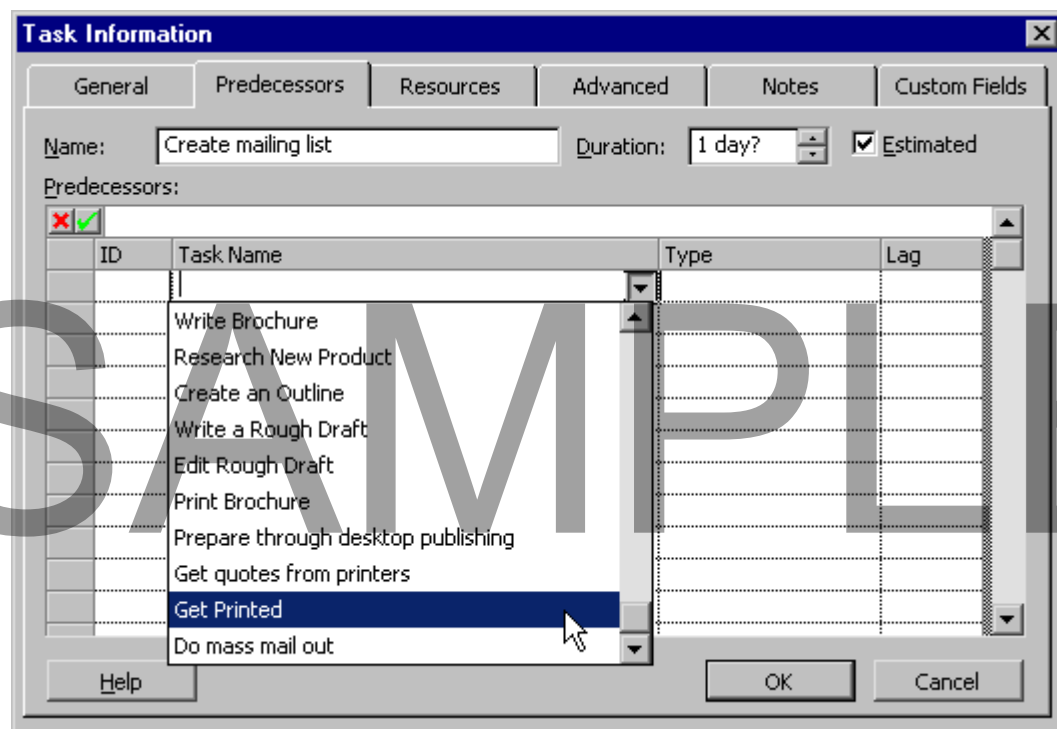
- Click **OK**. This tells Project that you cannot start creating an outline until the research for the new product is complete.
- Notice the **ID number** of the predecessor is shown in the **Predecessors** column of the Gantt table, and the dependency is represented by an **arrow**

in the Gantt Chart:

						05 Jan '04							
						S	S	M	T	W	T	F	S
1	🔄	Team Meeting	2.13 days	Mon 05/01/04	Wed 07/01/04								
2		Team Meeting 1	2 hrs	Mon 05/01/04	Mon 05/01/04								
3		Team Meeting 2	1 hr	Tue 06/01/04	Tue 06/01/04								
4		Team Meeting 3	1 hr	Wed 07/01/04	Wed 07/01/04								
5	📁	Write Brochure	3 days?	Mon 05/01/04	Wed 07/01/04								
6		Research New Product	2 days?	Mon 05/01/04	Tue 06/01/04								
7		Create an Outline	1 day?	Wed 07/01/04	Wed 07/01/04	6							
8		Write a Rough Draft	1 day?	Mon 05/01/04	Mon 05/01/04								
9		Edit Rough Draft	1 day?	Mon 05/01/04	Mon 05/01/04								
10	📄	Print Brochure	1 day?	Wed 07/01/04	Wed 07/01/04								
11		Prepare through desktop	1 day?	Wed 07/01/04	Wed 07/01/04								
12		Get quotes from printers	1 day?	Wed 07/01/04	Wed 07/01/04								
13		Get Printed	1 day?	Wed 07/01/04	Wed 07/01/04								
14	📁	Distribute Brochure	1 day?	Mon 05/01/04	Mon 05/01/04								
15		Create mailing list	1 day?	Mon 05/01/04	Mon 05/01/04								
16		Do mass mail out	1 day?	Mon 05/01/04	Mon 05/01/04								

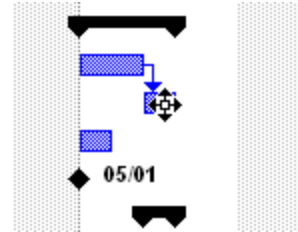
Using Start-to-Start (SS) Dependencies

- Double click on the **Create mailing list** task to open the **Task Information** dialog box.
- Click on the **Predecessors** tab.
- Click on the down arrow at the right side of the **Task Name** column and scroll down the list to select **Get Printed**:



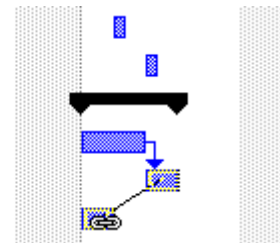
- Choose the **Start-to-Start** dependency from the drop-down menu of the **Type** column. This lets Project know that you can start creating your mailing list while the brochure is being printed.
- Click **OK**
- Now we will finish assigning the dependencies for all of the tasks in the project.
- In the Gantt Chart view, hover your mouse pointer over the **Create an Outline** task until the cursor becomes four arrows pointing outward:

5	☐ Write Brochure	3 days?	M
6	Research New Product	2 days?	M
7	Create an Outline	1 day?	V
8	Write a Rough Draft	1 day?	M
9	Edit Rough Draft	1 day?	M
10	☐ Print Brochure	1 day?	W



- Click and drag the mouse pointer to the **Write a Rough Draft** task. 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:

3	Team Meeting 2	1 hr	
Finish-to-Start Link			
From Finish Of:		Task 7	
To Start Of:		Task 8	
7	Create an Outline	1 day?	V
8	Write a Rough Draft	1 day?	M



- Release the mouse and the link will be created.
- Now we'll create the dependencies for the remaining tasks.
- Create a **Finish to Start** dependency for the following tasks using the drag and drop method in the Gantt Chart view:

Task 8 (Write a Rough Draft) to **Task 9** (Edit Rough Draft)

Task 9 (Edit Rough Draft) to **Task 11** (Prepare through desktop publishing)

Task 11 (Prepare through desktop publishing) to **Task 12** (Get quotes from printers)

Task 12 (Get quotes from printers) to **Task 13** (Get printed)

Task 15 (Create mailing list) to **Task 16** (Do mass mail out)

- As you add the dependencies, notice how the durations of the Summary tasks change.
- From the main menu, select **File > Save**.
- Close **New Product Brochure.mpp**.

- To see a sample of what the project should look like so far, open ***New Product Brochure – Tasks.mpp*** from the **Project 2003 Foundation Samples** folder.

SAMPLE

Resources

Creating a Resource List

- Open *New Product Brochure.mpp* from the **Project 2003 Foundation Work Folder**.
- From the main menu, choose **View > Resource Sheet**.
- Click in the first row of the **Resource Name** column.
- Type *Jane Doe*.
- Press **Return**.
- Click in the second row of the **Resource Name** column.
- Type *Katie Aiko*:

	Resource Name	Type	M
1	Jane Doe	Work	
2	Katie Aiko	Work	

- Press **Return**.
- Type *Postage* in the third row.
- Press **Return**.
- Select **Material** from the drop-down list in the **Type** column:

	Resource Name	Type	M
1	Jane Doe	Work	
2	Katie Aiko	Work	
3	Postage	Material	

- Enter *Stamps* as a unit of measurement in the **Material Label** field:

	Resource Name	Type	Material Label	In
1	Jane Doe	Work		J
2	Katie Aiko	Work		K
3	Postage	Material	Stamps	P

- Press **Return**.
- Leave all other options as the default as we will cover them in the following exercises.
- Save *New Product Brochure.mpp* by clicking on the **Save** icon on the Standard toolbar.

Entering Working Time

- Open the **Resource Information** dialog box by double clicking on the **Resource Name** Jane Doe in the Resource Sheet view.
- Click on the **Working Time** tab.
- Select the **Project 2003 Foundation Exercise** from the **Base calendar** drop down menu:

Resource Information

General Working Time Costs Notes Custom Fields

Resource Name: Jane Doe Base calendar: Standard

Set working time for selected date(s)

Legend:

- Working
- Nonworking
- Edited working hours

On this calendar:

- I Edits to a day of the week
- 31 Edits to an individual day

Select Date(s):

November 2003						
M	T	W	Th	F	S	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Nonworking time
 Nondefault working time

From: 08:00 To: 12:00

13:00 17:00

Help Details... OK Cancel

- Click **OK**.
- In the **Resource Sheet** view, select the **Project 2003 Foundation Exercise** calendar from the **Base Calendar** drop down column for **Katie Aiko**.
- From the main menu select **File > Save**.

Entering Costs

- In the **Resource Sheet** view, enter the following rate information for **Jane Doe**.
- Type **20** in the **Std. Rate** column.
- Press **Return**.
- Type **30** in the **Ovt. Rate**.
- Press **Return**.

- Enter the following rate information for **Katie Aiko**.
- Double click on **Katie Aiko** to open the **Resource Information** dialog box.
- Click on the **Costs** tab.
- Type **30** in the **Standard Rate** column.
- Type **45** in the **Overtime Rate**.
- Click **OK** to close the dialog box and return to the **Resource Sheet** view.

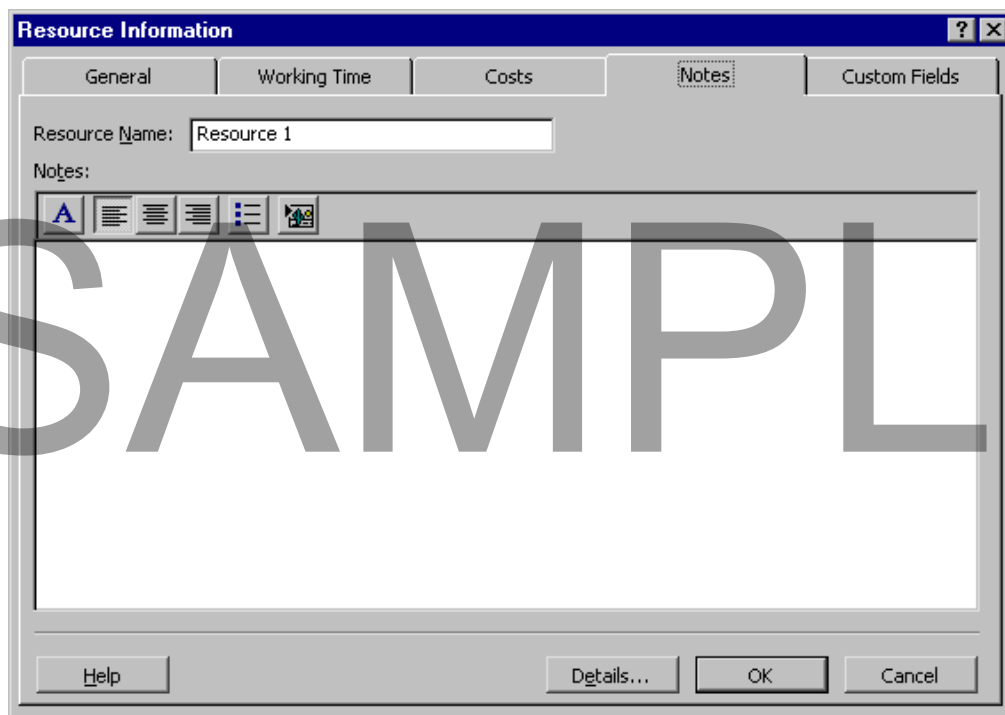
- Enter the following rate information for **Postage**.
- Type **0.5** in the **Std. Rate** column.
- Press **Return**.
- Your resource sheet should look like this:

	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar	Code
1	Work		J		100%	20.00/hr	30.00/hr	0.00	Prorated	Project 2003 Fou	
2	Work		K		100%	30.00/hr	45.00/hr	0.00	Prorated	Project 2003 Fou	
3	Material	Stamps	P			0.50		0.00	Prorated		

- Leave **Prorated** in the **Accrue At** field. Project will calculate the cost throughout the project.
- From the main menu, choose **File > Save**.

Entering Notes

- Right-click on the Jane Doe resource and select **Resource Notes** from the drop-down menu to open the **Resource Information** dialog box:



- Click on the **Notes** tab.
- Type ***Send reminder regarding team meeting*** in the **Notes** area.
- Click **OK** to save and attach the note to your resource.
- Notice the note symbol in the **Indicator** column of the **Resource Sheet** view. Hover your mouse cursor over it to display the note:

	i	Resource Name	Type	Material Label
1		Jane Doe	Work	
2		Notes: 'Send reminder regarding team meeting.'		
3		Postage	Material	Stamps

- Click on the **Save** button on the **Standard** toolbar.

Assigning Resources

- From the main menu select **View > Gantt Chart**.
- Double click on the **Team Meeting 1** task to open the **Task Information** dialog box.
- In the first row in the **Resources** tab, select **Jane Doe** from the drop-down list.
- In the second row, select **Katie Aiko**:

Task Information

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

Name: Team Meeting 1 Duration: 2h Estimated

Resources:

Resource Name	Units
Jane Doe	100%
Katie Aiko	
Postage	

Help OK Cancel

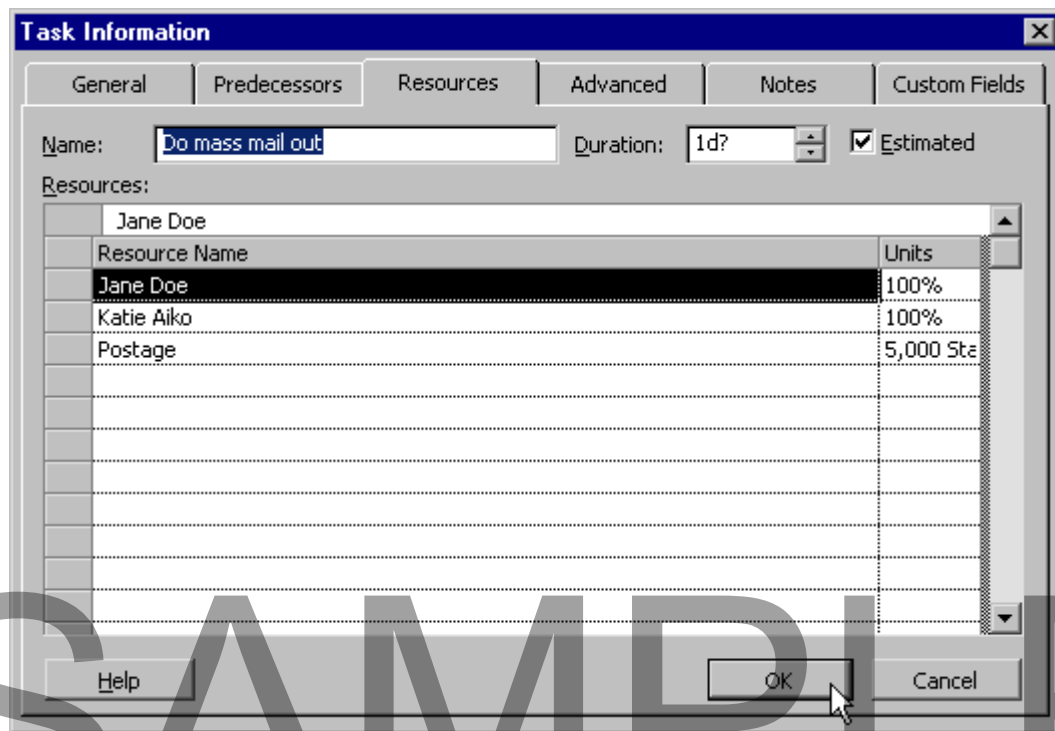
- This assigns both resources to the team meeting because both resources are required to attend the meeting. Click **OK** to close the dialog box.
- In the **Gantt Chart** view, use the drop down menu in the **Resource Names** column to assign the following tasks to **Jane Doe**:

Research New Product
 Create an Outline
 Write a Rough Draft

- In the **Gantt Chart** view, use the drop down menu in the **Resource Names** column to assign the following tasks to **Katie Aiko**:

Edit Rough Draft
 Prepare through desktop publishing
 Get quotes from printers
 Create mailing list

- Double click on the **Do mass mail out** task to open the **Task Information** dialog box.
- Click on the **Resources** tab.
- Assign **Jane Doe**, **Katie Aiko** and **Postage** to the task.
- Change the **Units** for the Postage to **5,000**.
- Click **OK**:

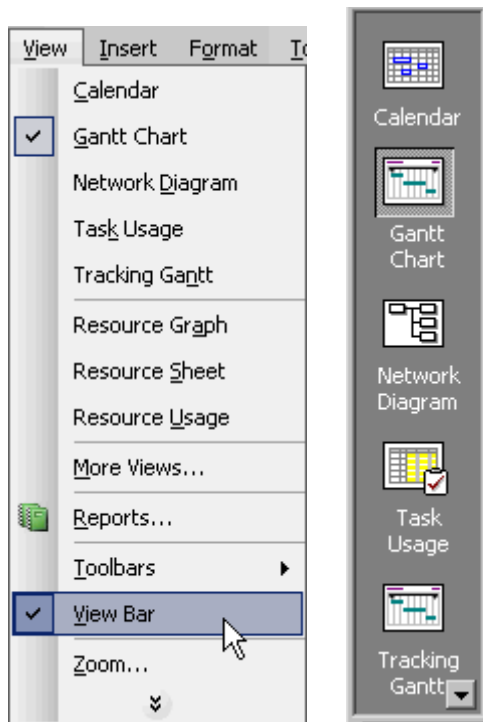


- Select **File > Save** to save the changes.
- From the main menu, select **File > Close**.
- Exit Project 2003.
- To see an example of what the project should look like so far, open the **New Product Brochure – Resources.mpp** from the **Project 2003 Foundation Samples** folder. Look at both the **Gantt Chart** and **Resource Sheet** View. Close without saving any changes.

Views

Introduction to Views

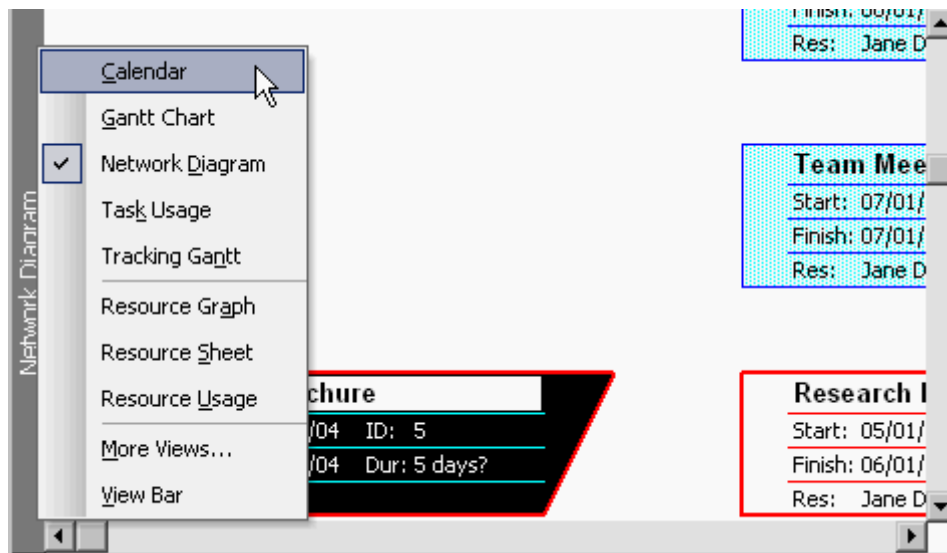
- Open **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- From the main menu, choose **View > View Bar**. A check mark will appear beside **View Bar** if it is selected, and it will be displayed vertically on the left side of the window:



- Click on **Calendar** to move quickly to the **Calendar** view.
- Click on **Network Diagram** to move quickly to the **Network Diagram** view.
- Hide the **View Bar** by deselecting it from the **View** drop down menu.
- **Save** the changes.

Splitting the Window

- From the main menu, choose **Window > Split**. The window will be divided into two parts. Click on the vertical grey label on the left side of the top window to activate the top pane.
- Right click and select **Calendar** from the pop up menu:

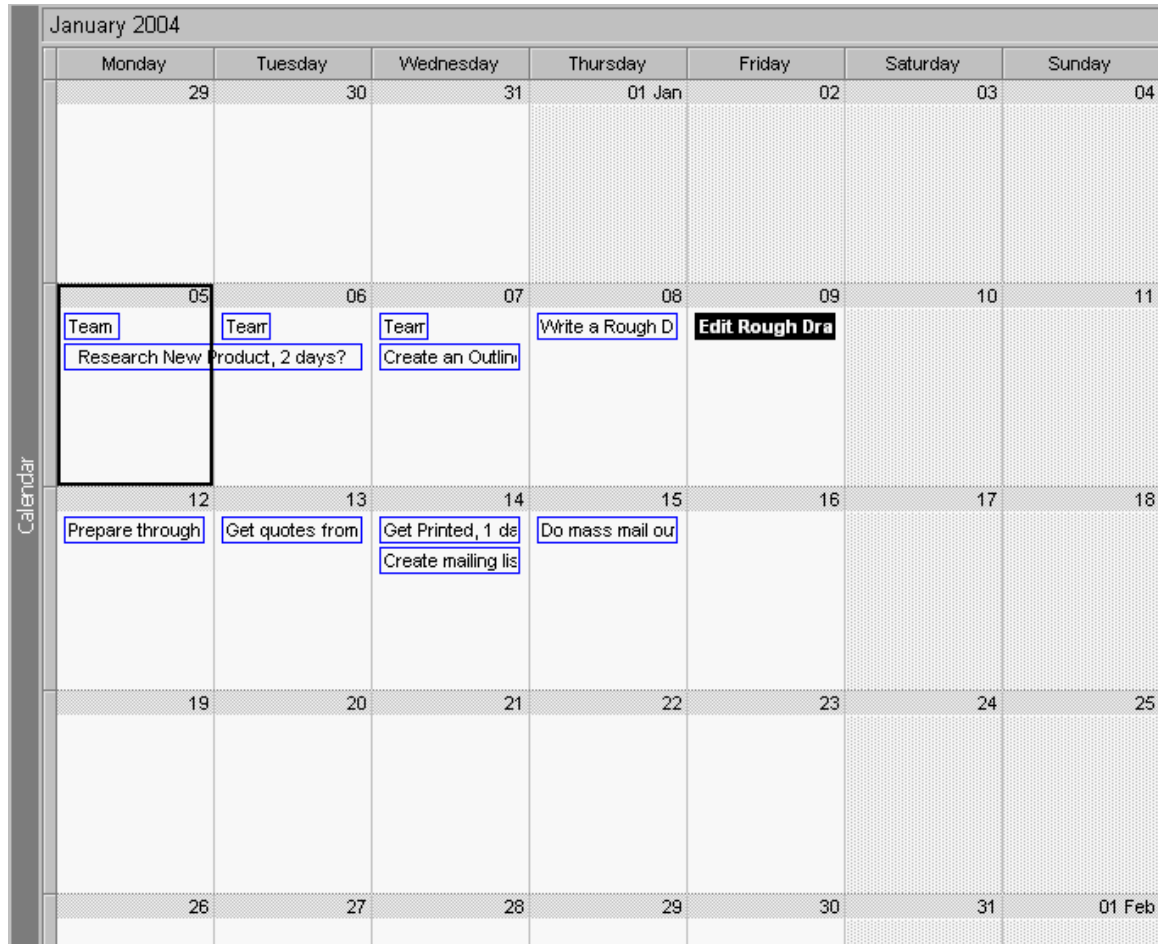


- The **Calendar** is now displayed in the top pane.
- Remove the split by selecting **Window > Remove Split** from the main menu.
- Close the **New Product Brochure.mpp** file without saving any changes.

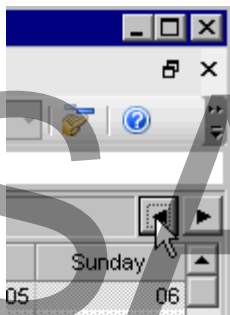
Using the Calendar View

- Open **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- Select **View > Calendar** from the main menu.
- The calendar is displayed in a monthly format to show scheduled tasks:

SAMPLE



- **Tasks** are shown by a bar stretching over the amount of days allocated for the task.
- The solid black bar shows a **milestone**.
- Scroll through the months by using the arrow buttons on the top right corner of the windows:

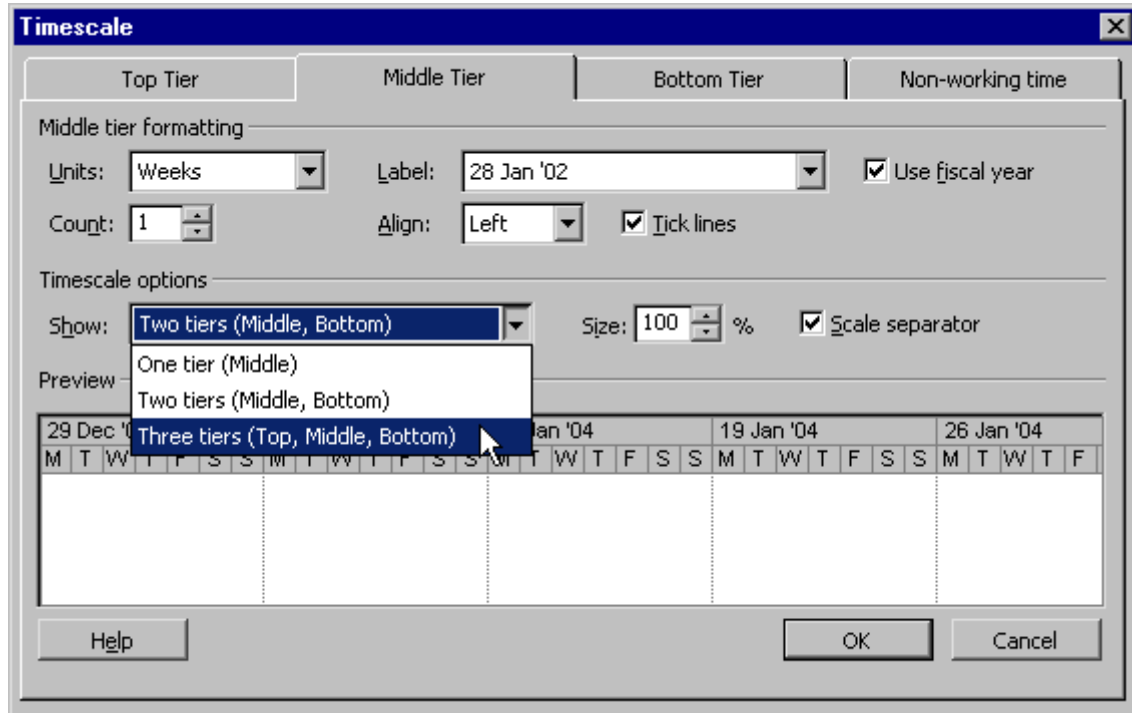


- Close the file without saving the changes.

Using the Gantt Chart View

- Open *New Product Brochure.mpp* from the **Project 2003 Foundation Work Folder**.

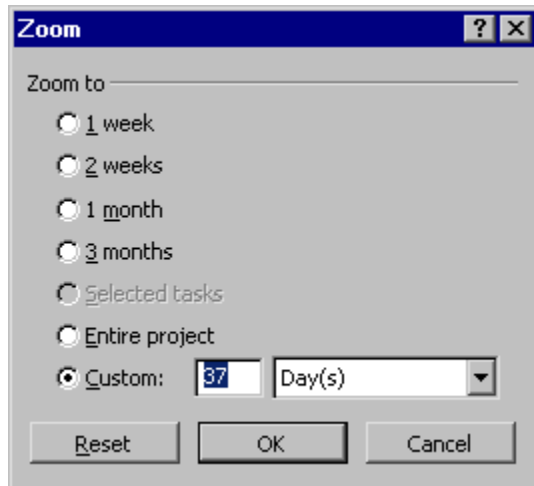
- From the main menu, choose **View > Gantt Chart**.
- Double click on the **timescale** at the top of the Gantt chart to open the **Timescale** dialog box.
- In the **Middle Tier** tab, select **Three tiers (Top, Middle, Bottom)** from the **Show** drop-down menu:



- Click **OK**.
- Experiment with resizing the two windows of the Gantt Chart view. Hover your mouse cursor over the grey vertical divider until it becomes two lines with arrows pointing outward. Click and drag the line until it is in the position you desire:



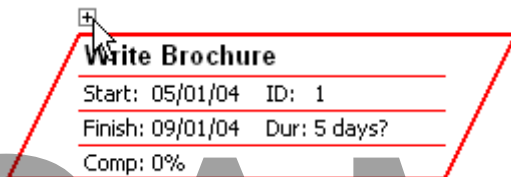
- From the main menu, choose **View > Zoom**. The **Zoom** dialog box is displayed:



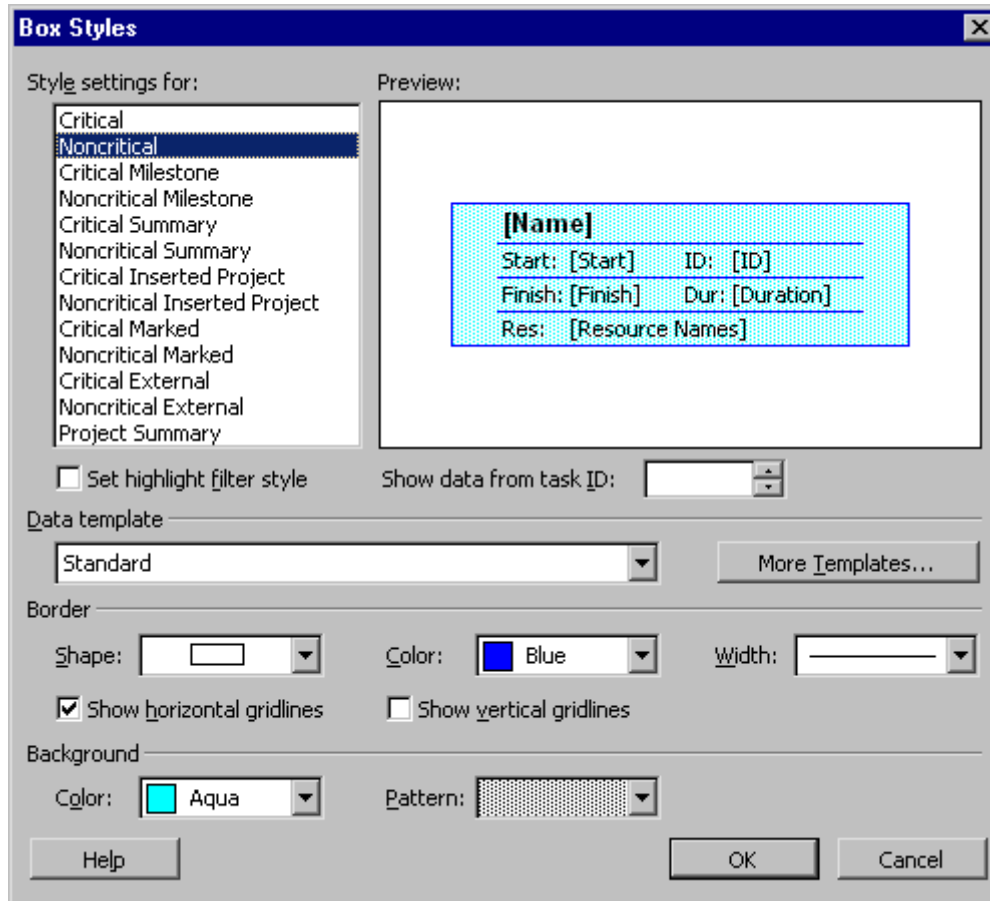
- Select **1 week**.
- Click **OK**.
- Use the **Zoom Out** icon on the **Standard** toolbar to see two weeks.
- Close the file without saving the changes.

Using the Network Diagram View

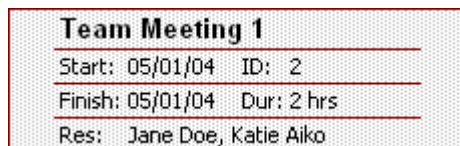
- Open *New Product Brochure.mpp* from the **Project 2003 Foundation Work Folder**.
- From the main menu, choose **View > Network Diagram** (If it is not already shown).
- **Hide** details of the Write Brochure task by clicking on the box on the upper left corner of the Summary task node:



- Different shaped nodes represent different types of tasks. Let's change the format of the **Team Meeting 1** shape. Select **Team Meeting 1**. Choose **Format > Box Styles** from the main menu. The **Box Styles** dialog box opens with available options:



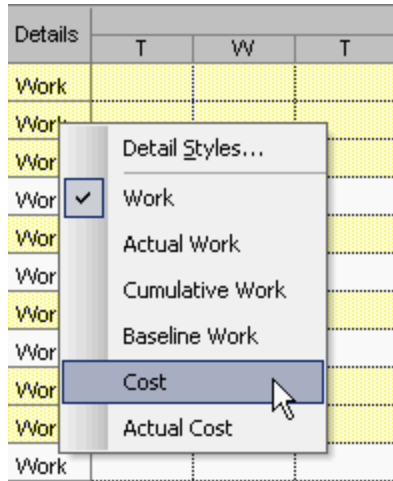
- Change the **Border** colour to **Maroon**.
- Change the **Background** colour to **Silver**
- Click **OK**.
- Observe the new look of the shape:



- Close the file without saving the changes.

Using the Task Usage View

- Open **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- From the main menu, choose **View > Task Usage**.
- Right-click on **Work** in the **Details** column of the **Task Usage chart**, and select **Cost**:



- Notice that now both **Work** and **Cost** are listed in the **Task Usage chart**:

Details	05 Jan '04		
	M	T	W
Work	4h	2h	2h
Cost	100.00	50.00	50.00
Work	4h		
Cost	100.00		

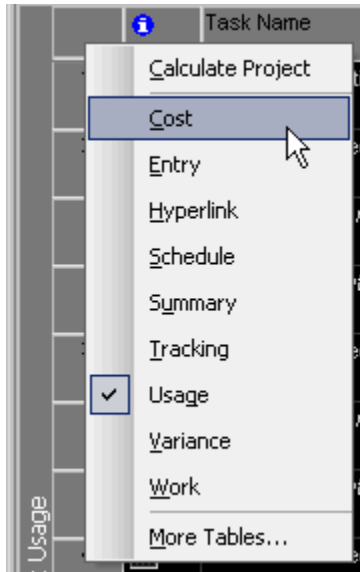
- By default, the **Task Usage** table is shown in the left pane:

		Task Name	Work	Duration	Start
1		Team Meeting	8 hrs	2.13 days	Mon 05/01/04
2		Team Meeting 1	4 hrs	2 hrs	Mon 05/01/04
		Jane Doe	2 hrs		Mon 05/01/04
		Katie Aiko	2 hrs		Mon 05/01/04

- To change this, click on the **select all button** at the top left corner of the table:



- **Right-click** and select **Cost**:



- Now the cost is displayed in the table:

	Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost
1	<input type="checkbox"/> Team Meeting	0.00	Prorated	200.00
2	<input type="checkbox"/> Team Meeting 1	0.00	Prorated	100.00
	<i>Jane Doe</i>			40.00
	<i>Katie Aiko</i>			60.00

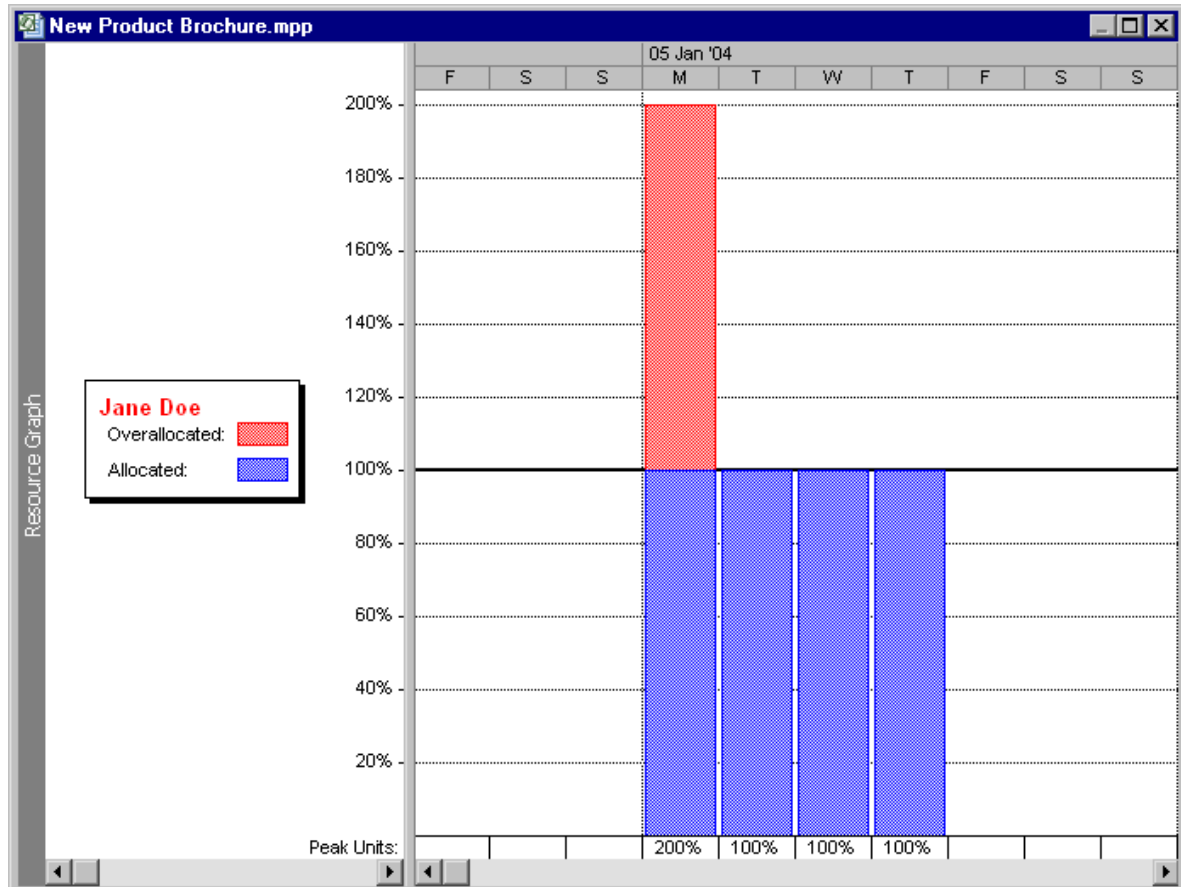
- Close the file without saving the changes.

Using the Resource Graph View

- Open *New Product Brochure.mpp* from the **Project 2003 Foundation Samples** folder.
- From the main menu, choose **View > Resource Graph**.

Note: If the Resources are not visible, use the scroll bar at the bottom of the Graph pane to navigate to the dates in which the project fall.

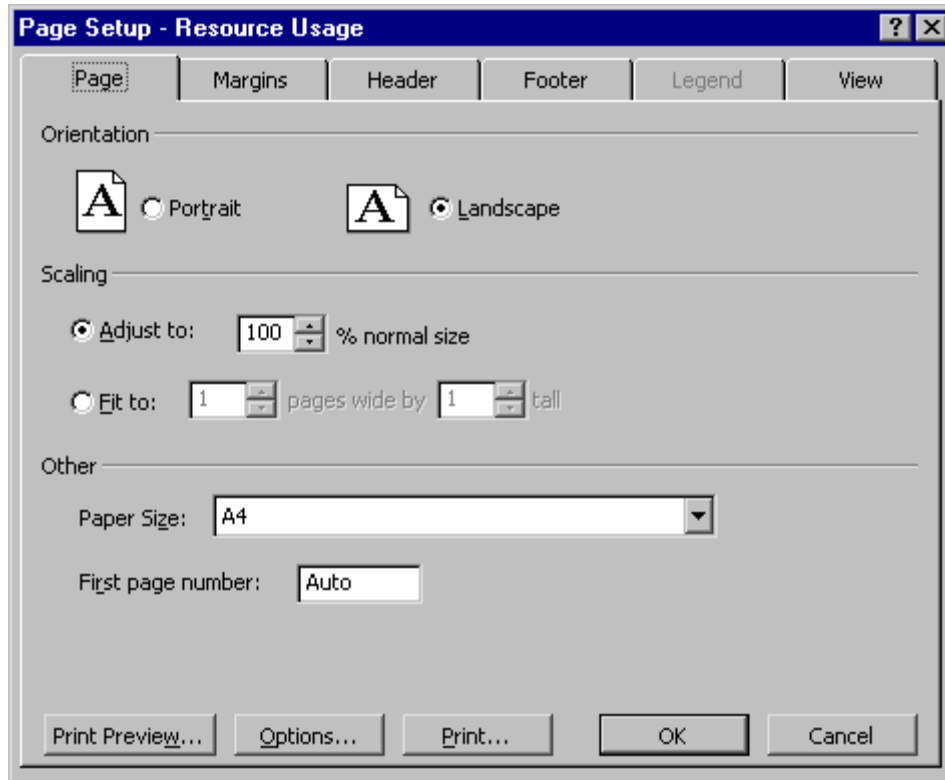
- Notice how a red column represents **overallocations**:



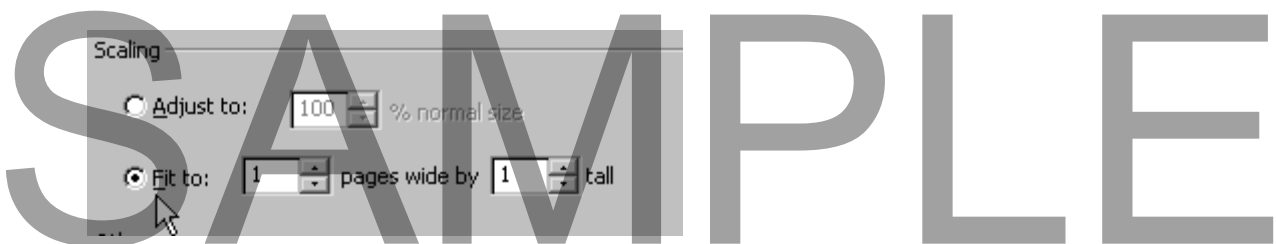
- Use the **scroll bar** at the bottom of the left pane to view other resources.
- Close the file without saving the changes.

SAMPLE

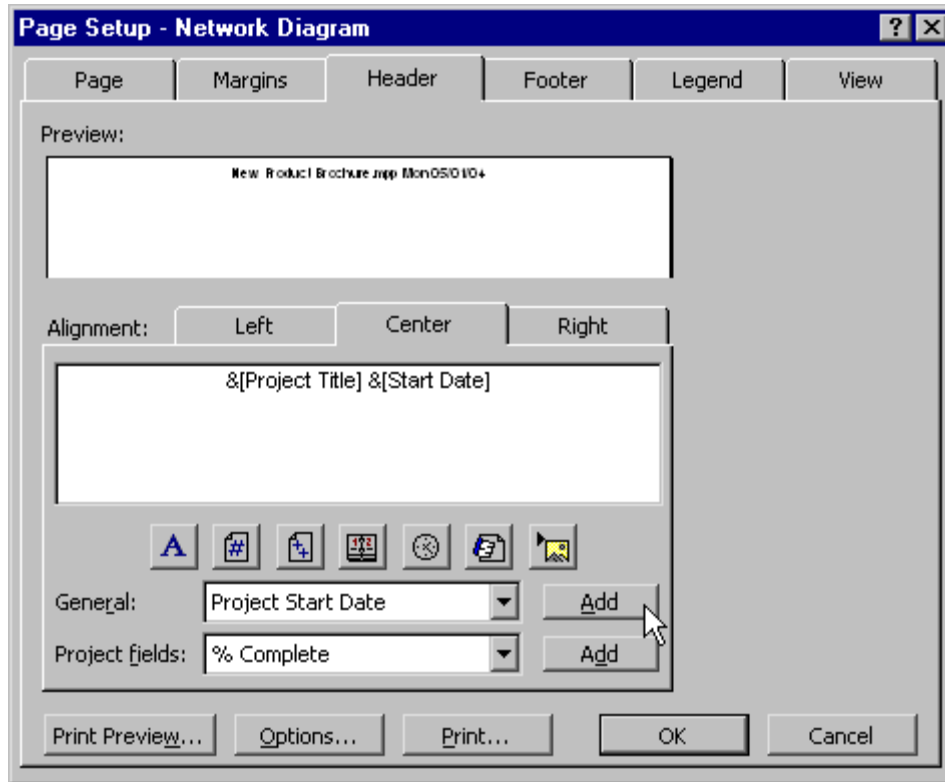
- Open the **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- From the main menu, select **View > Network Diagram**.
- Click on the **Print Preview** button on the **Standard** toolbar.
- Notice that it would take several pages to print the Network Diagram. Let's change the page setup so that it will fit on one page and also add a header and footer.
- Close the Print Preview window.
- From the main menu, select **File > Page Setup**:



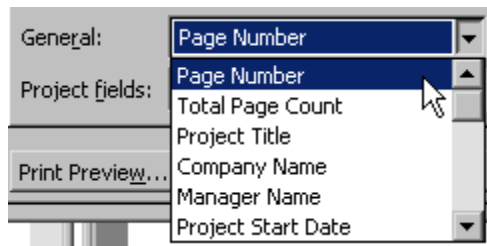
- Click on the **Page** tab and select the **Fit to** radio button in the **Scaling** area. Set it to scale to **1** pages wide by **1** pages tall:



- Click on the **Header** tab.
- Select **Project Title** from the **General** drop down menu and click on **Add**.
- Select **Project Start Date** from the **General** drop down menu and click on **Add** again. You can observe your new header in the **Preview** area.

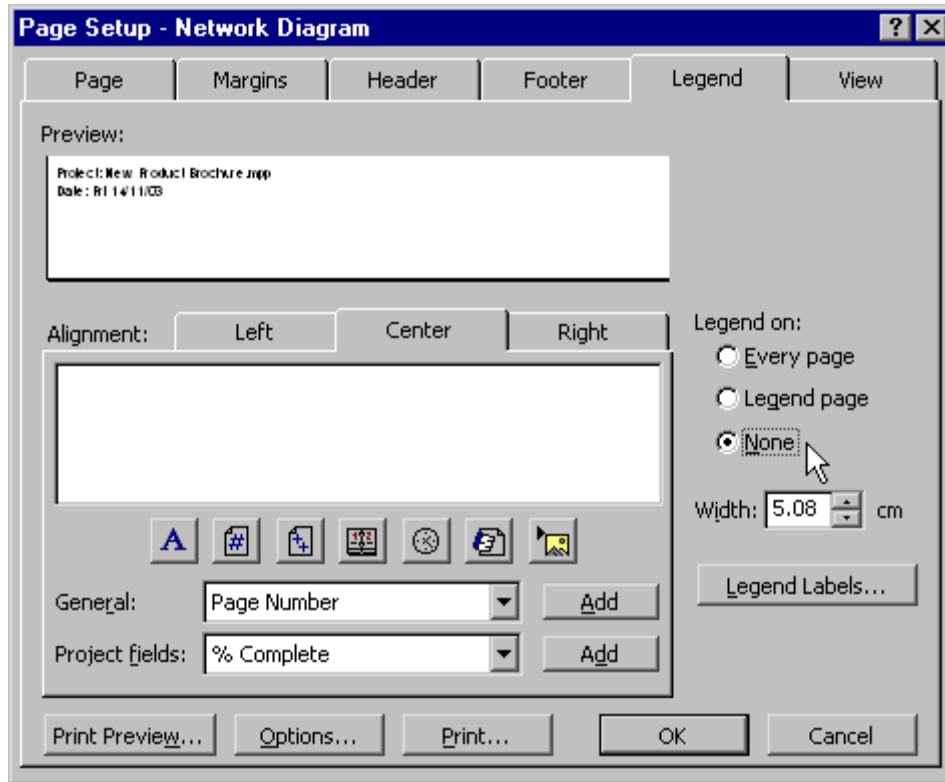


- Click on the **Footer** tab and select **Page Number** from the **General** drop down menu. Click on **Add**:



- Click on the **Legend** tab and select **None** from the **Legend on** area:

SAMPLE



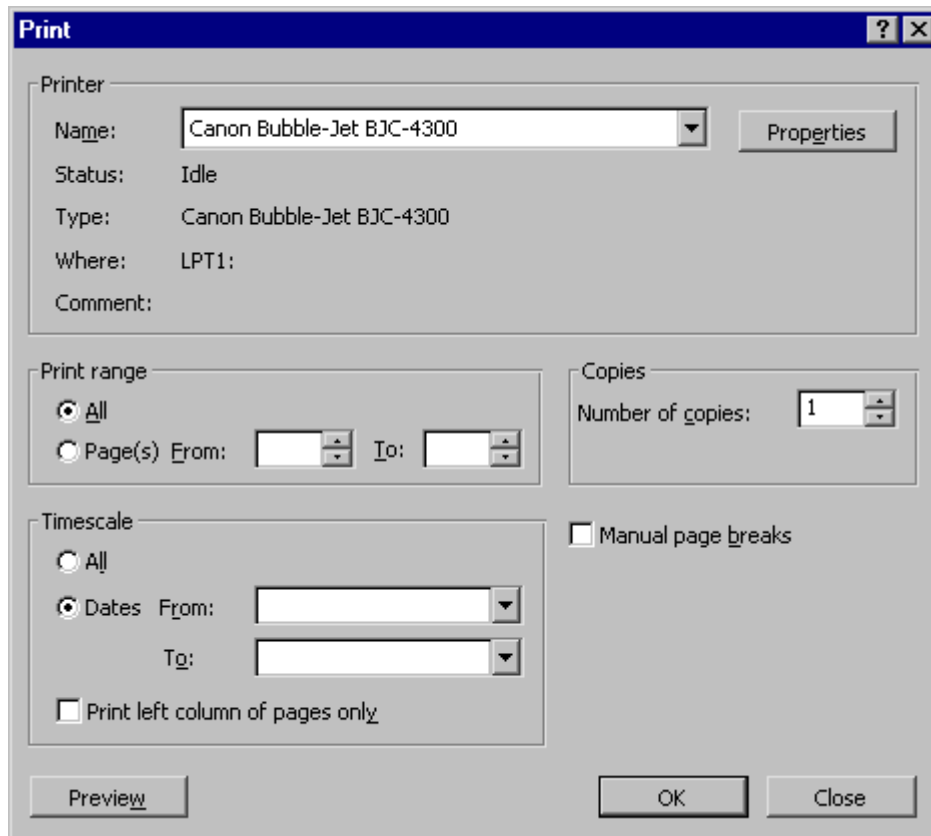
- Click on **OK**.
- Now click on the **Print Preview** button to open the **Print Preview** and view the changes you have made to the page setup.
- Close the Print Preview window.
- Close the file without saving any changes.

Understanding the Print Dialog Box

- Open the **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- From the main menu, select **View > Calendar**.
- From the main menu, select **File > Print**.

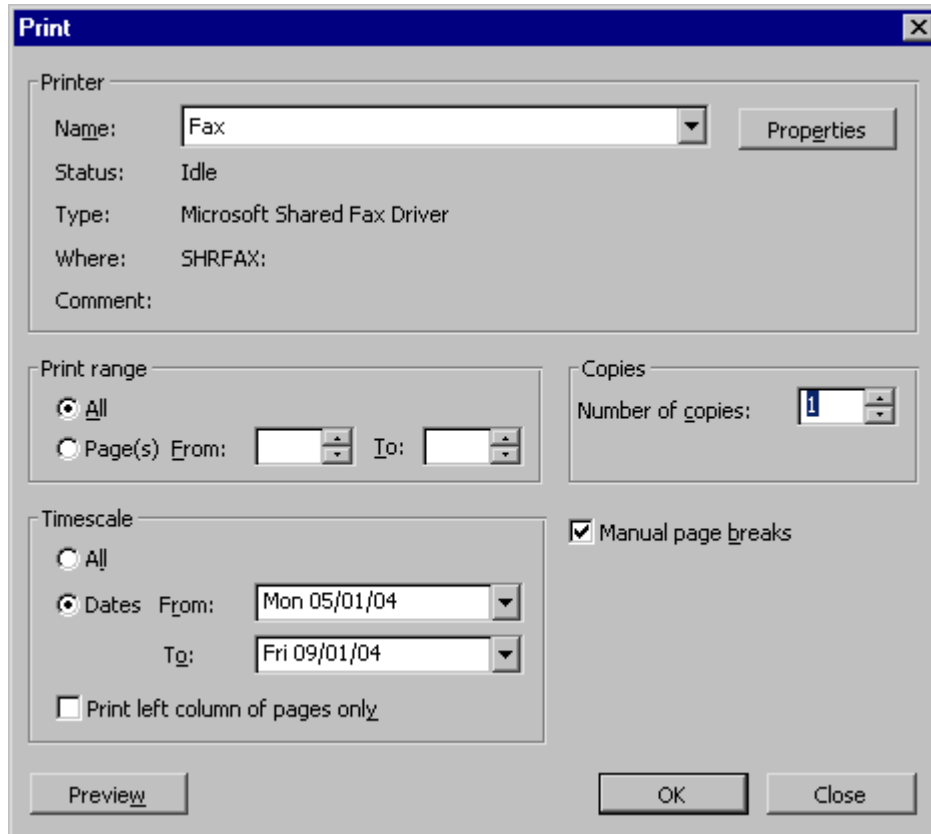
SAMPLE

- This opens the **Print** dialog box:



- Choose the printer you would like to use from the drop-down menu in the **Printer** section (the selection will depend on which printers you have installed on your computer).
- Select **All** in the **Print** range area.
- Select the **Dates** radio button in the **Timescale** section, which allows you to select the dates you would like to include in the report.
- Set the **From** date to **Mon 05/01/04** and the **To** date to **Fri 09/01/04**. This will print only the tasks that are included the dates of our project:

SAMPLE

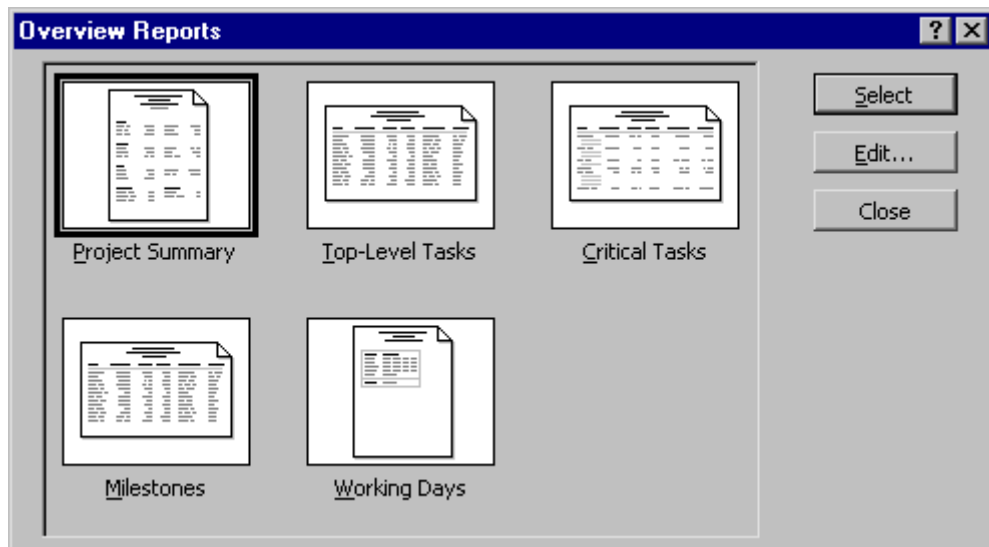


- Click on the **Preview** button to open the **Print Preview** window.
- Click on the **Close** button to return to the **Calendar** view without printing the page.
- Close the file without saving any changes.

Understanding the Different Types of Reports

Using Overview Reports

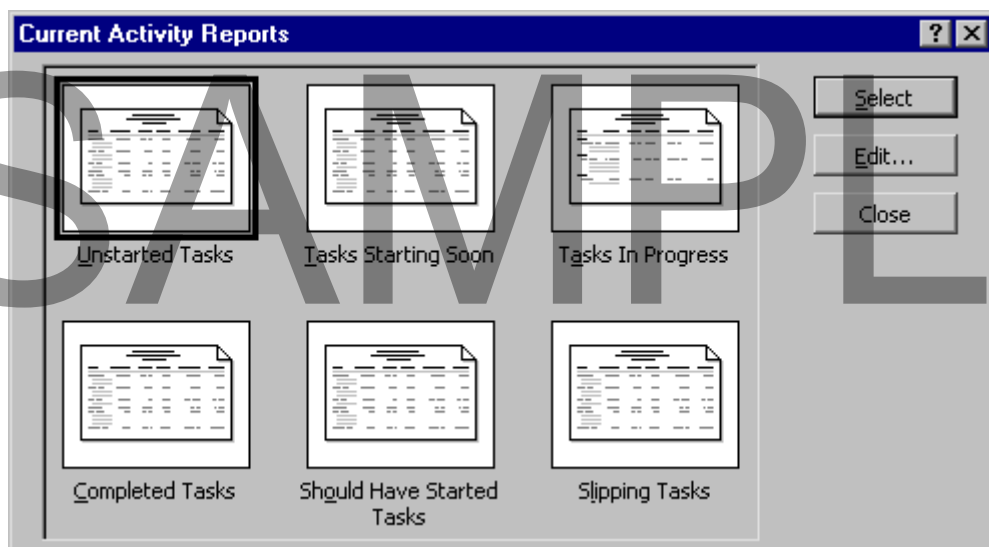
- Open the **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- To display the **Overview Reports** dialog box, from the main menu, select **View > Reports**.
- Click on **Overview** and then click on **Select**.
- There are five types of Overview Reports: **Project Summary, Top-Level Tasks, Critical Tasks, Milestones** and **Working Days**.



- Click on **Project Summary** and click on **Select**. The print preview opens and shows top-level information about the entire project including dates, duration, work, costs, task status, and resource status.
- Click on **Close** to close the print preview.
- Experiment with the other types of **Overview** reports by choosing each of the options and clicking **Select**.

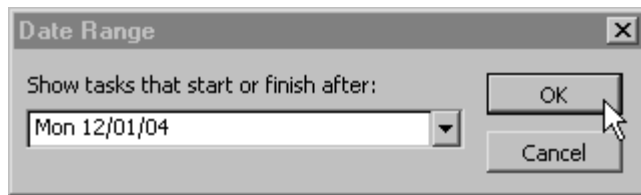
Using Current Activity Reports

- To display the **Current Activities Reports** dialog box, from the main menu, select **View > Reports**.
- Click on **Current Activities** and then click on **Select**.
- There are six Current Activity Reports: **Unstarted Tasks**, **Tasks Starting Soon**, **Tasks In Progress**, **Completed Tasks**, **Should Have Started Tasks** and **Slipping Tasks**:

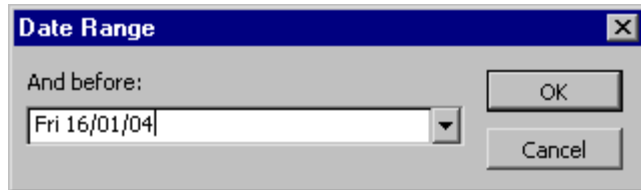


- Click on **Tasks Starting Soon** and press **Select**.

- Enter **Mon 12/01/04** in the first **Date Range** dialog box, and click **OK**:



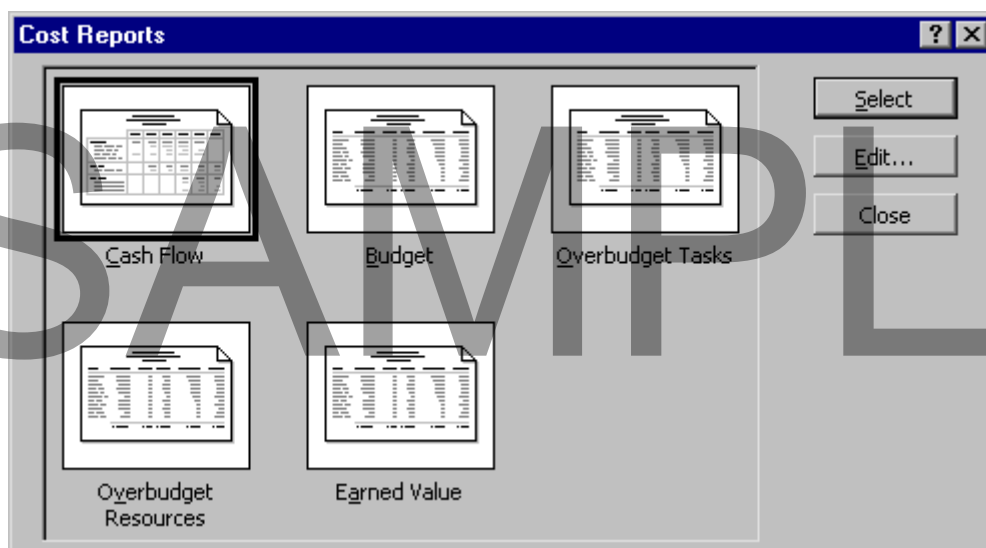
- Enter **Fri 16/01/04** in the first **Date Range** dialog box, and click **OK**:



- The report is opened in the Print Preview window and shows only the tasks that start after Mon 12/01/04 and before Fri 16/01/04.
- Click **Close**.
- Experiment with the other types of **Current Activities** reports by choosing each of the options and clicking **Select**.
- Click **Close**.

Using Cost Reports

- To display the **Costs Reports** dialog box, from the main menu, select **View > Reports**.
- Click on **Costs** and then click on **Select**.
- There are five Cost Reports: **Cash Flow**, **Budget**, **Overbudget Tasks**, **Overbudget Resources** and **Earned Value**:

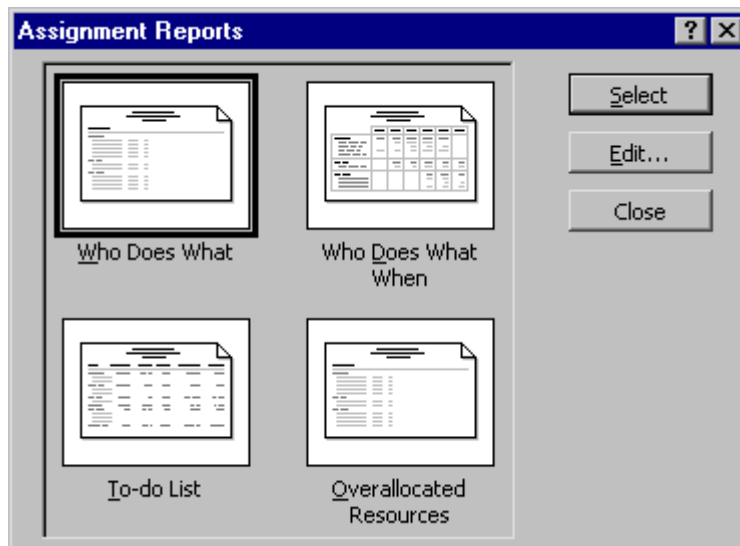


- Click on **Cash Flow** and click on **Select**.

- The report is opened in the Print Preview window and shows the project costs, sorted by task, in weekly time increments.
- Click **Close**.
- Experiment with the other types of **Cost** reports by choosing each of the options and clicking **Select**.
- Click **Close**.

Using Assignments Reports

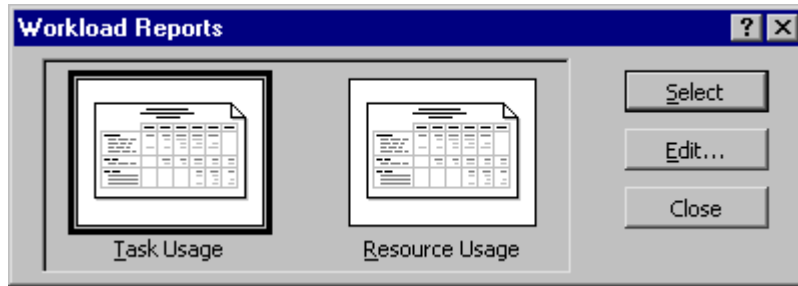
- To display the **Assignments Reports** dialog box, from the main menu, select **View > Reports**.
- Click on **Assignments** and then click on **Select**.
- There are four Assignments Reports: **Who Does What**, **Who Does What When**, **To-do List**, and **Overallocated Resources**:



- Click on **Who Does What When** and click on **Select**. The report is opened in print preview and shows daily work scheduled for each resource on each task.
- Click **Close**.
- Experiment with the other types of **Assignments** reports by choosing each of the options and clicking **Select**.
- Click **Close**.

Using Workload Reports

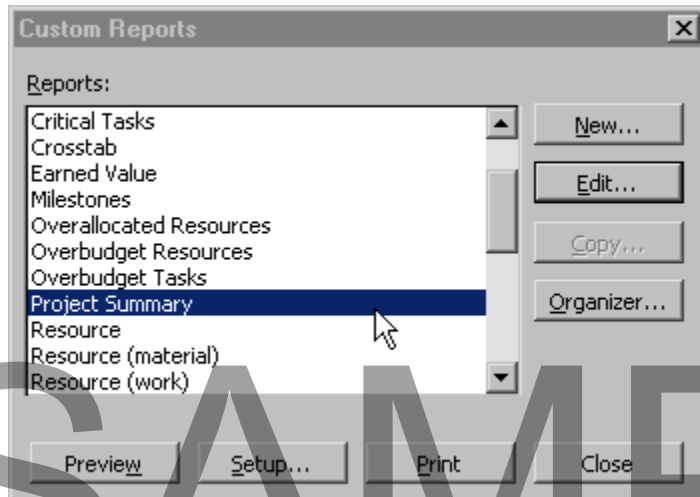
- To display the **Workload Reports** dialog box, from the main menu, select **View > Reports**.
- Click on **Workload** and then click on **Select**.
- There are two Workload Reports: **Task Usage** and **Resource Usage**:



- Click on **Task Usage** and click on **Select**. The report is opened in print preview and shows tasks, resources assigned to each task, and the amount of work assigned to each resource, summarised in weekly increments.
- Click **Close**.
- Experiment with the other **Workload** report by choosing **Resource Usage** and clicking **Select**.
- Click **Close**.

Using Custom Reports

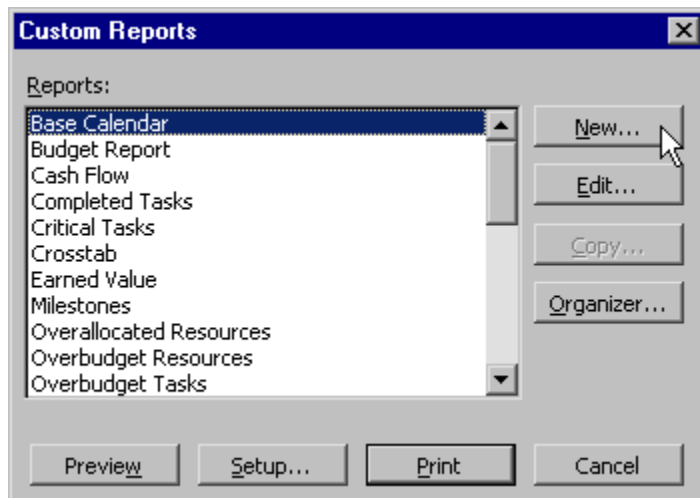
- To display the **Custom Reports** dialog box, from the main menu, select **View > Reports**.
- Double click on the **Custom** icon in the **Reports** dialog box to open the **Custom Reports** dialog box.
- Select **Project Summary** from the list of reports:



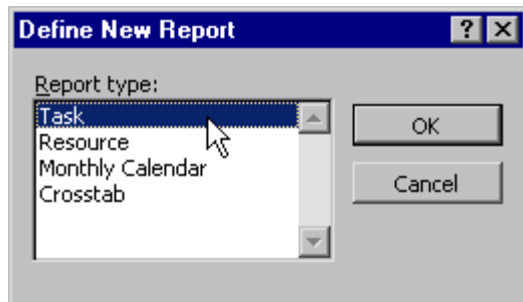
- Click on **Edit** to open the **Report Text** dialog box.
- Change the **Font** to **Times New Roman**, and the **Font style** to **Bold Italic**.
- Click **OK**.
- Click on the **Preview** button to open the print preview window. Notice that the font is now bold italic Times New Roman
- Click **Close** on the Print Preview task pane to return to the **Custom Reports** dialog box.
- Close the **Custom Reports** dialog box.
- Close the **Reports** dialog box.

Creating a New Report

- From the main menu, choose **View > Reports**.
- Double click on the **Custom** icon in the **Custom Reports** dialog box.
- Click **New**:

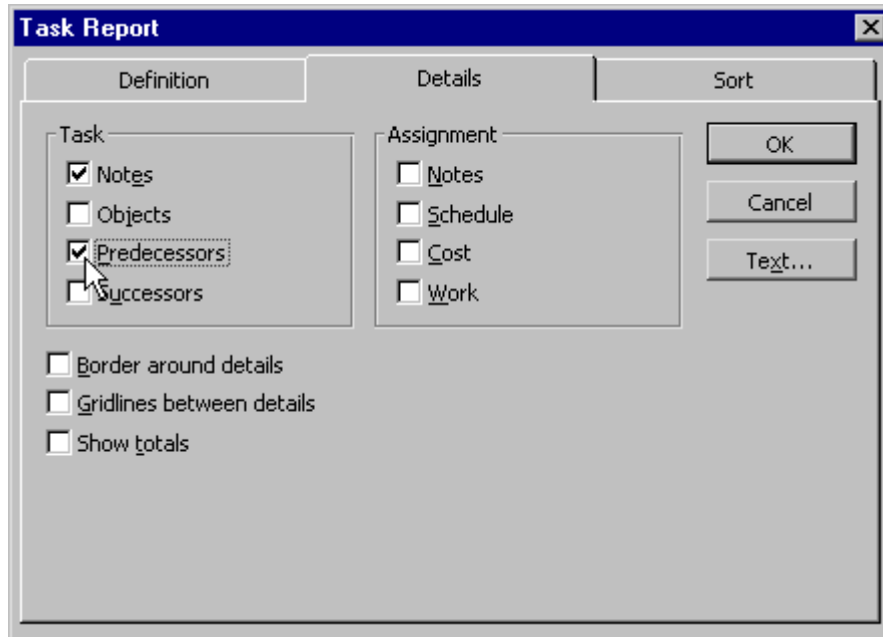


- Select **Task** from the report types listed:

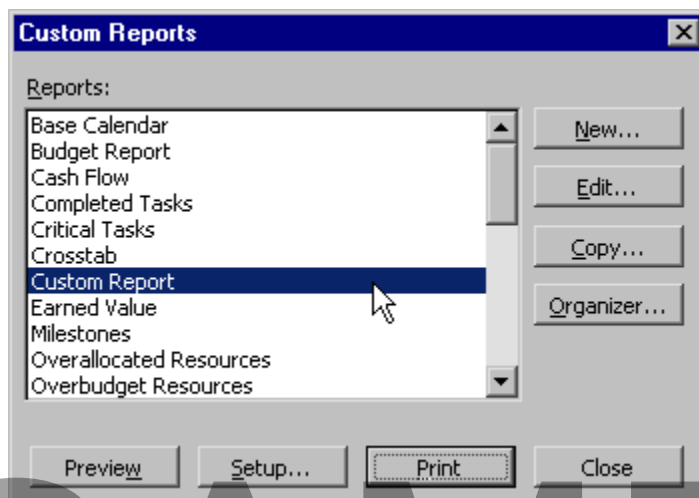


- Click **OK**.
- In the **Definition** tab, type **Custom Report** in the **Name** box.
- Click on the **Details** tab and select **Notes** and **Predecessors** in the **Task** area:

SAMPLE



- Click **OK**.
- Note that your **Custom Report** is listed among the other reports in the **Custom Reports** dialog box:

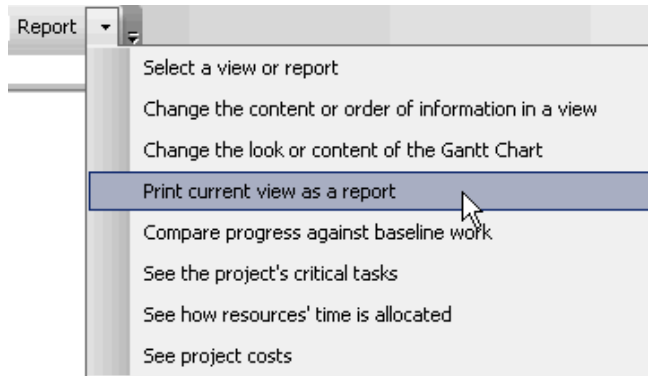


- Click on the **Preview** button to see your newly created report that shows all the tasks with their predecessors and notes.
- Click on **Close**.
- Close the **Custom Reports** dialog box.
- Close the **Reports** dialog box.
- Close **New Product Brochure.mpp** without saving the changes.

The Project Guide for Printing Wizard

Using the Project Guide for Printing Wizard

- Open the **New Product Brochure.mpp** from the **Project 2003 Foundation Samples** folder.
- From the main menu, select **View > Gantt Chart**.
- From the **Project Guide** toolbar, select **Report > Print current view as a report**:

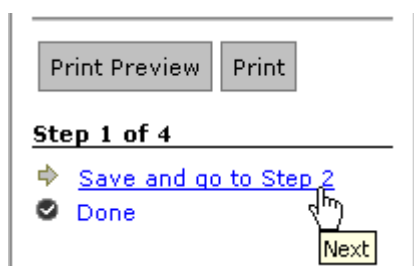


- This will open the **Print Current View** Pane:



SAMPLE

- Click on **Save and go to Step 2** to continue:



- In Step 2, leave all options as they are.
- Click on **Save and go to Step 3** to continue.
- In Step 3, leave all options as they are.
- Click on **Save and go to Step 4** to continue.
- Click **Print** to print your report.
- This will open the **Print** dialog box.
- Click **OK** to print.
- Close the file without saving the changes and exit Project 2003.

SAMPLE