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Project XP

Manual - Foundation Level

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Introduction to Microsoft Project XP

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

- Use the main menu
- Use the task pane
- Use the new project pane
- Use the basic search pane
- Use Microsoft Project Help
- 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 XP?

Project 2002

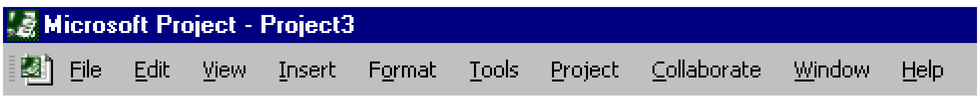
- **Microsoft Project 2002** is Microsoft's answer to project management. It provides all the tools you need for effective planning, tracking, problem solving, sharing, and completing a project in keeping with conventional management principles and practices.

  It can be used for a project of any size. It simply provides a framework to start with, as well as the means to organize and manage effectively. It is like having a project management assistant.

The Project 2002 Environment

Using the Main Menu

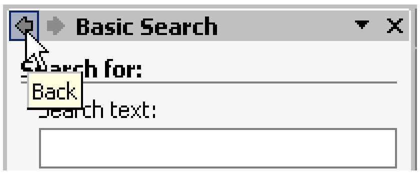
- The **Main Menu** contains all of the Project 2002 menu options. From these menu options, you can access most of Project 2002's features. It consists of drop-down menus that allow you to select the command you want to execute:



Using the Task Pane

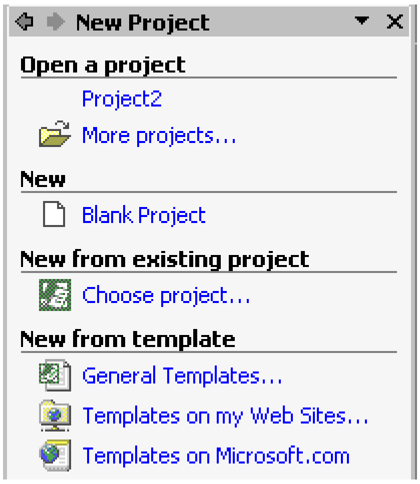
- The **Task Pane** is a like a dialog box that lists some of the most common tasks that you might want to accomplish with Project. The Task Pane automatically opens when Project is started for the first time. If the pane does not open, open it by selecting **View** > **Toolbars** > **Task Pane** from the main menu.

- Project provides two task panes: **New Project** and **Basic Search.** You can navigate between the two task panes by clicking the 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 arrows at the top left corner to move to the next pane:



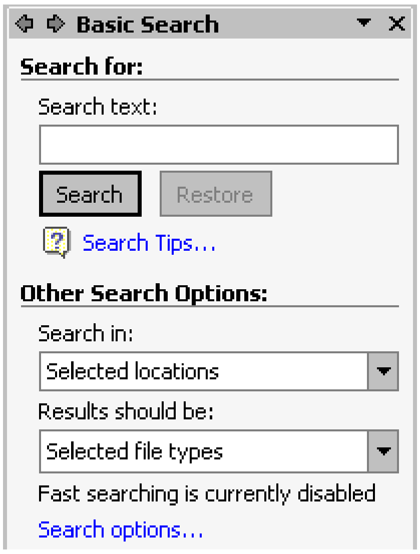
Using the New Project Pane

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



Using the Basic Search Pane

- The **Basic Search Pane** provides a dialog box for searching key words. You can specify the perimeters for your search by using the **Search in** and **Results should be** drop-down menus:



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**

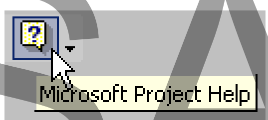
  OR from the main menu, choose **View > Toolbars** and deselect **Task Pane** from the drop-down menu.

Using Microsoft Project Help

- Project 2002's help is similar to the help found in Microsoft Office products. You can access it several ways.

To access Microsoft Project Help:

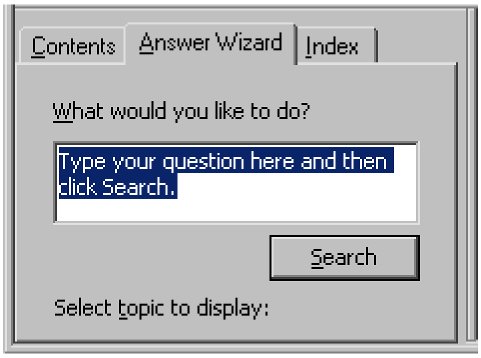
- Click on the **Help** icon found on the far right corner of the **Standard** toolbar:



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

  OR press the **F1** key.

- You can find information using one of three tabs in the **Microsoft Project Help window**: **Contents**, **Answer Wizard** and **Index**:

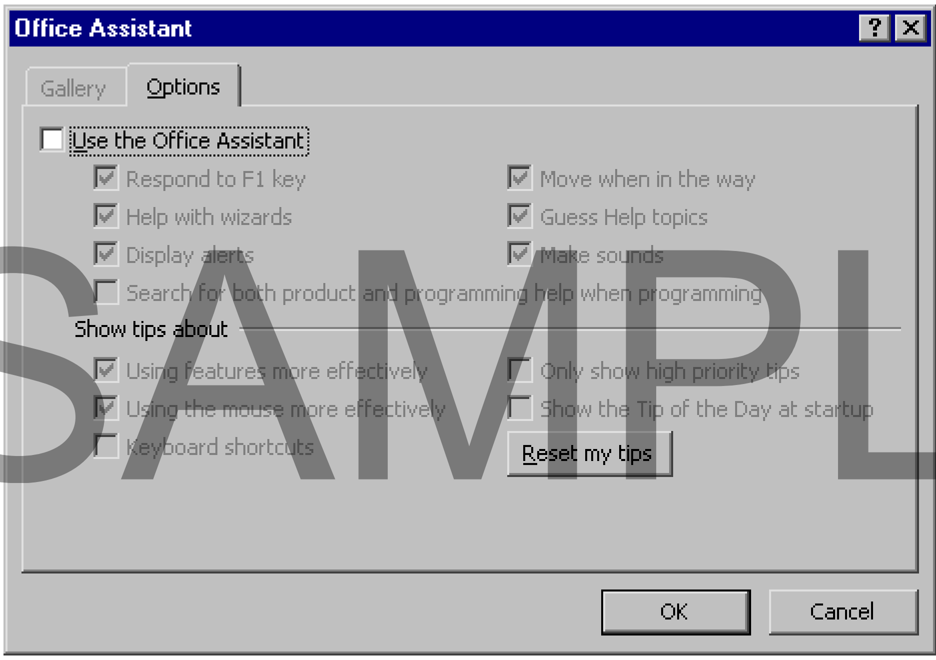


Accessing the Office Assistant

- 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 of which you can click on 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 2002 window, or they can **float** independently. To **move a toolbar**, place 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:

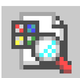
Using the Standard Toolbar

- The **Standard** toolbar provides quick access to commonly used actions. An icon represents each 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.

No Group

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 Microsoft Project Help.

Using the Formatting Toolbar

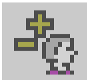
- The **Formatting** toolbar provides quick access to commonly used formatting actions. An icon represents each action. When you point to an icon with your cursor (without clicking), a descriptive tool tip appears to help you identify it. The following is a list and brief description of the icons on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

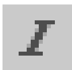

Hide Assignments - hides assignments.

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.

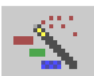

Left Align - aligns the selected text to the left.


Center - aligns the selected text to center.


Right Align - aligns the selected text to the right.

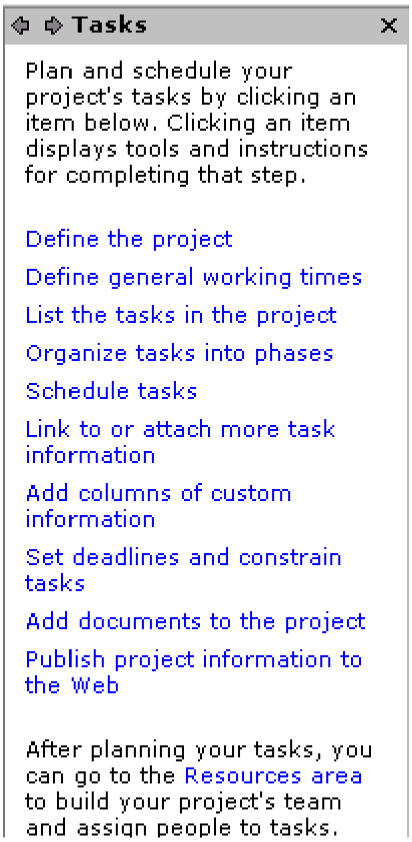
Filter - allows you to filter tasks according to the selected option from the drop-down menu.


Auto Filter - 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" that 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**:

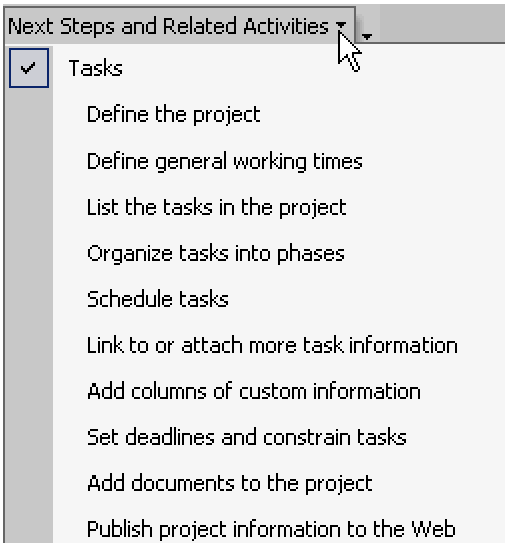


- You can easily navigate from one topic to the next using the **Project Guide toolbar**:

- To show or hide the Project Guide, simply click on the **Show/Hide Project Guide** icon on the Project Guide toolbar:

Note: You can also click on the "**x**" button in the upper right-hand corner of the pane.

- The **Next Steps and Related Activities** drop-down menu lists all of the available tools in helping you start your project, and provides a quick way to navigate around the Project Guide's main topics and subsections:



Review Questions

How would you:

- Use the main menu?
- Use the task pane?
- Use the new project pane?
- Use the basic search pane?
- Use Microsoft Project Help?
- 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

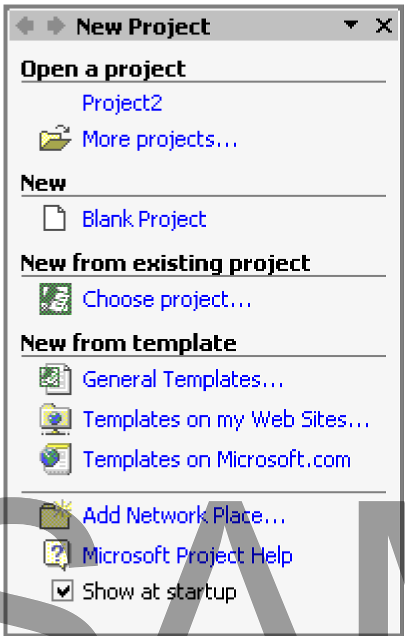
When you have completed this learning module you will have seen how to:

- 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

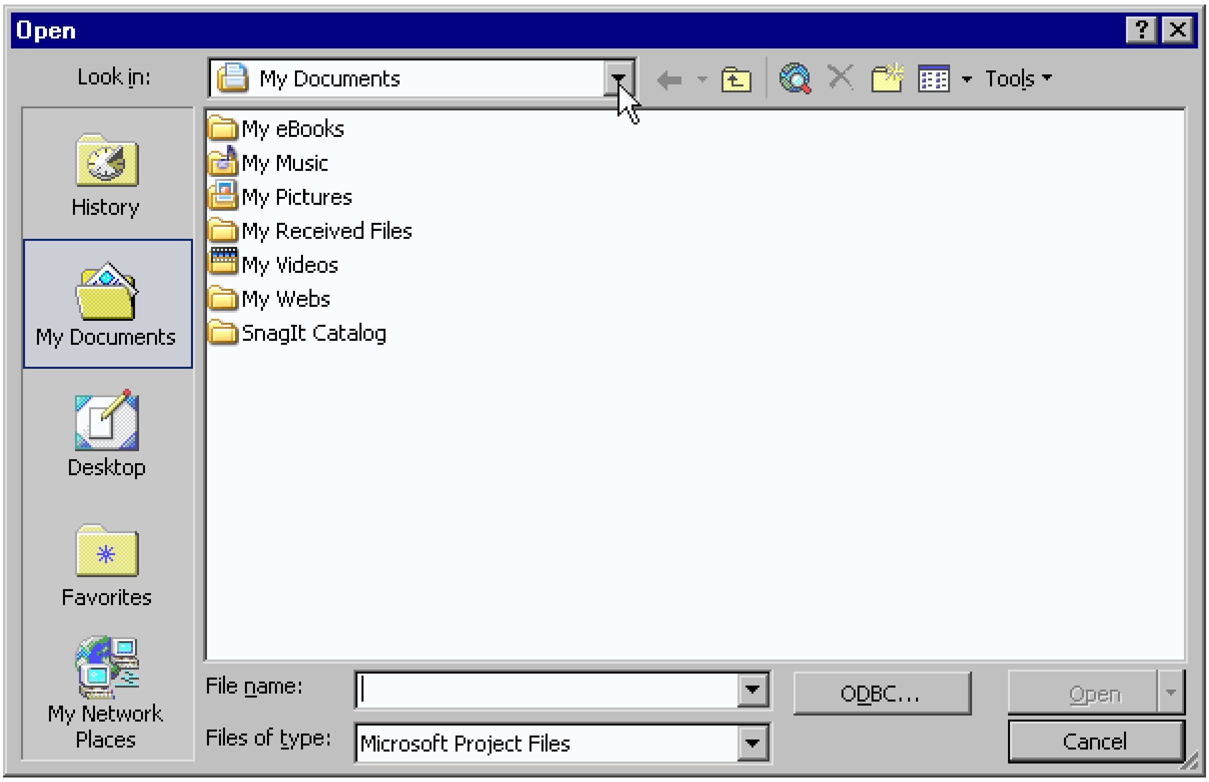
Opening a Project

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

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

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

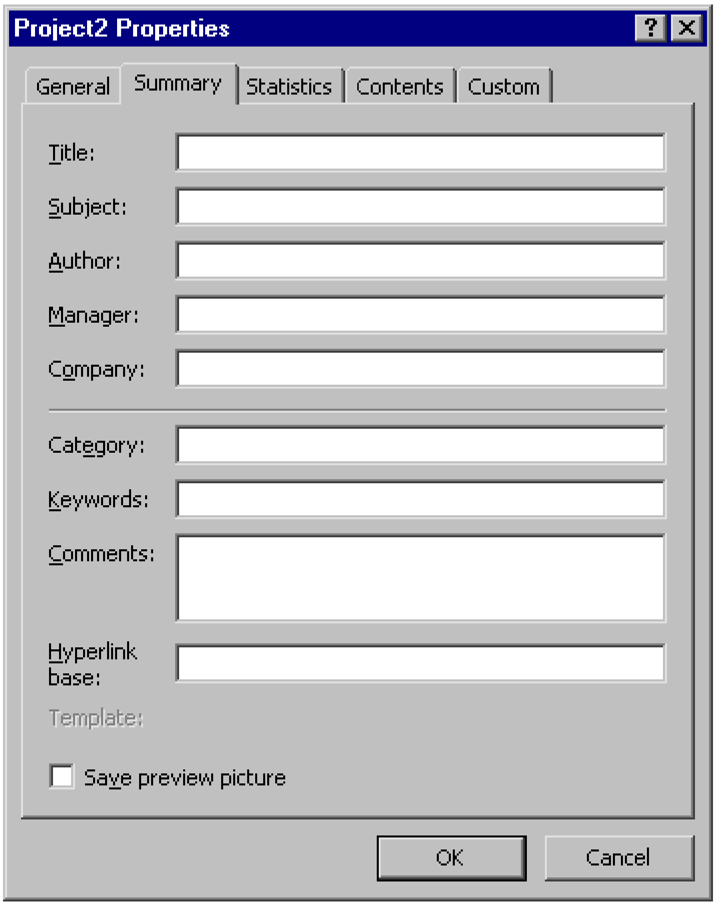
- This will display the **Open** dialog box. Browse to find the project you wish to open. Open either by **highlighting** the file and clicking **Open**, or by **double clicking** it:



Using File Properties

Utilizing File Properties

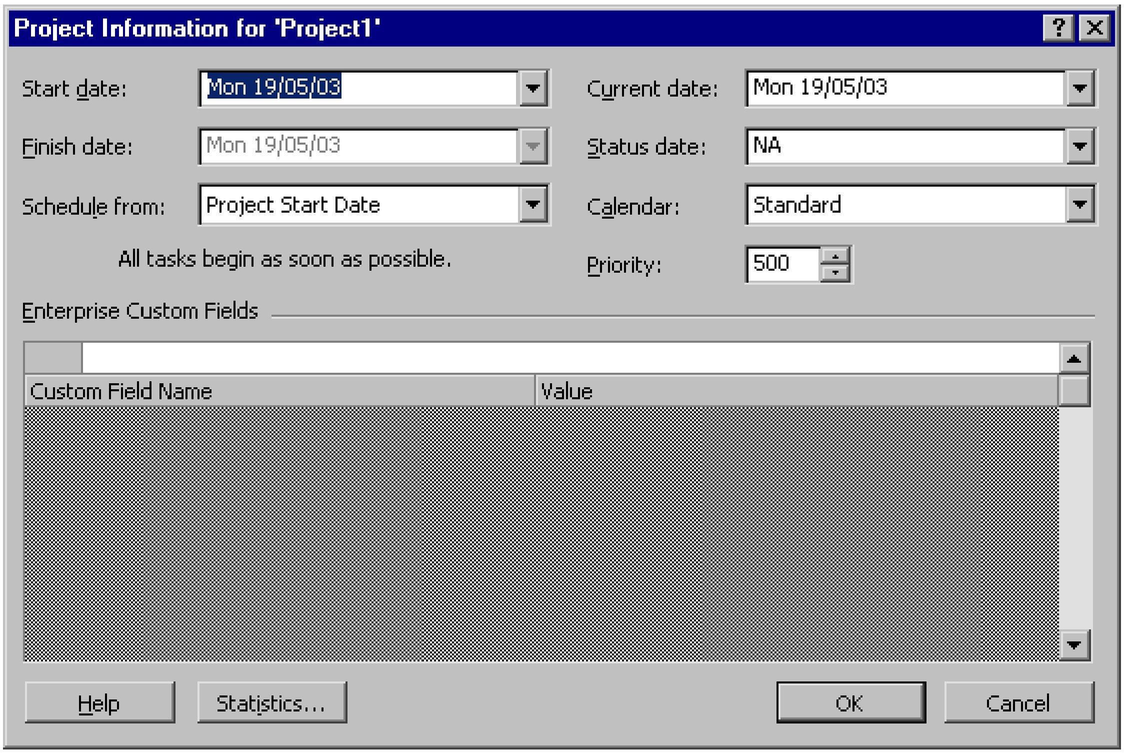
- **File properties** automatically gathers and stores miscellaneous information about a file. To access file properties, from the main menu, choose **File > Properties**. The **File Properties** dialog box is displayed. In the **Summary** tab, you can enter any additional information you may want to record regarding your project:



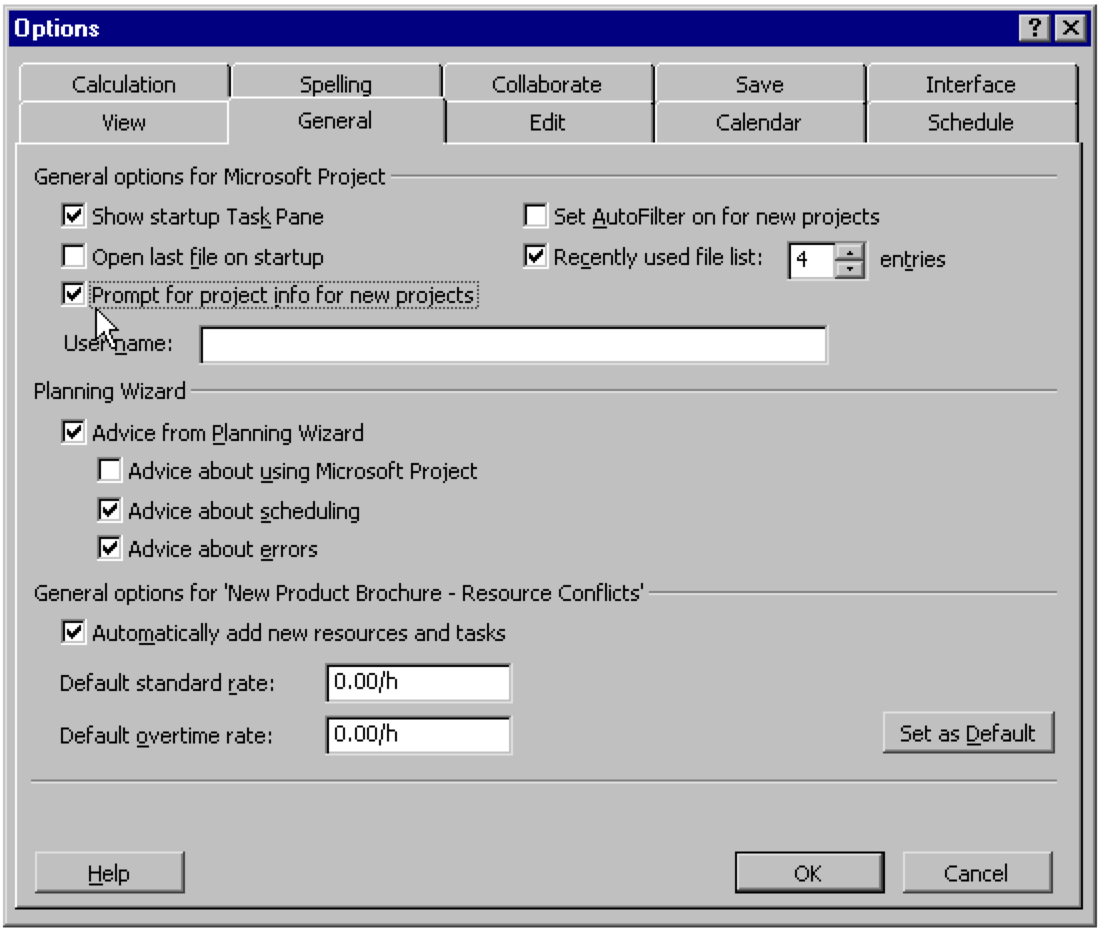
Entering Start and Finish Dates

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 that you choose.
- The start and finish date information is entered in the **Project Information** dialog box.
- To enter project information, from the main menu, choose **Project > Project Information**. The **Project Information** dialog box will be displayed:



- 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.
- 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**:



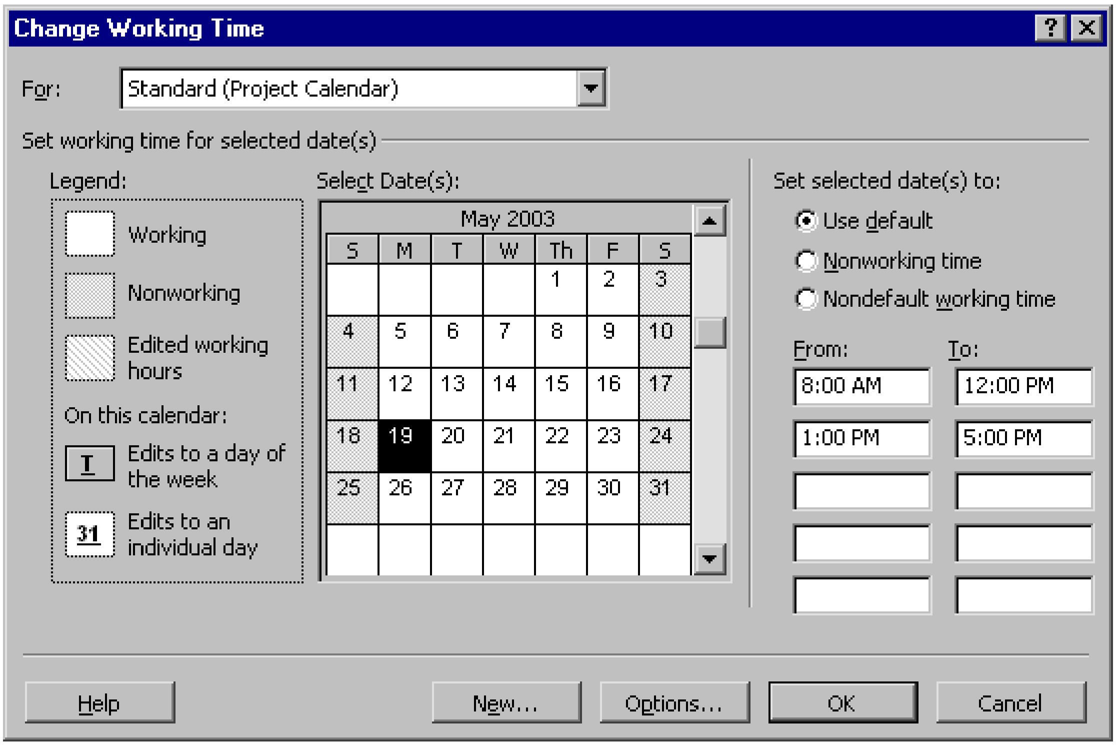
Establishing a Project Calendar

Setting up a Project Calendar

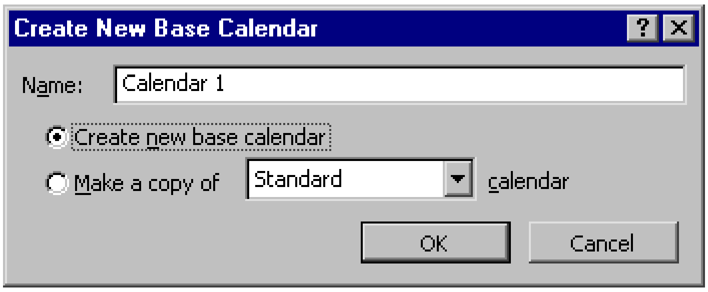
- Project supplies three basic calendars (**Standard**, **Night Shift** and **24 Hours**) that you can use as foundations to create your own base calendar. You can make a calendar that indicates general working times for each resource or group of resources. Project will use this information for things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

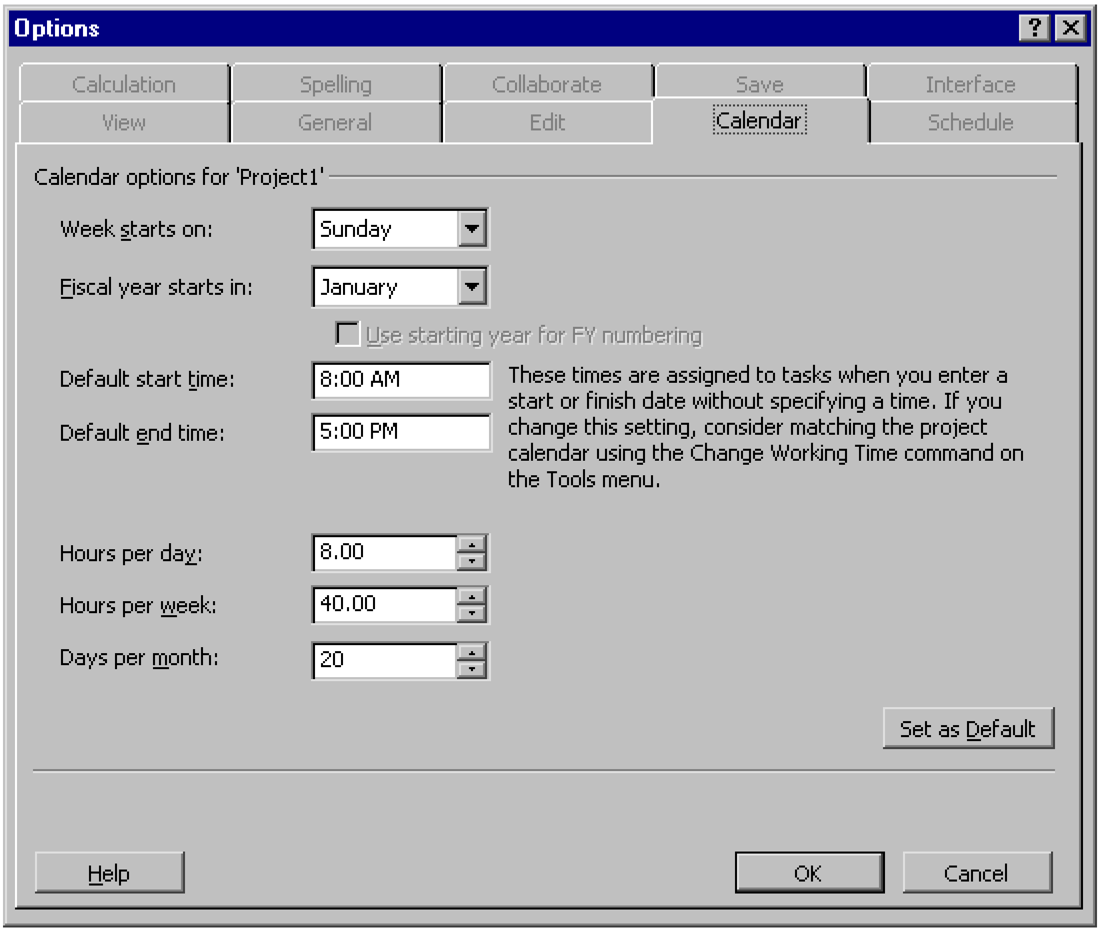


- Enter a descriptive name for the new calendar.
- Use the radio buttons to either **create a new base calendar**, or make a **copy** of the type of calendar you select from the drop-down menu.
- Click **OK** to go back to the **Change Working Time** dialog box to customize the new base calendar.

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.

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



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 Dates** 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

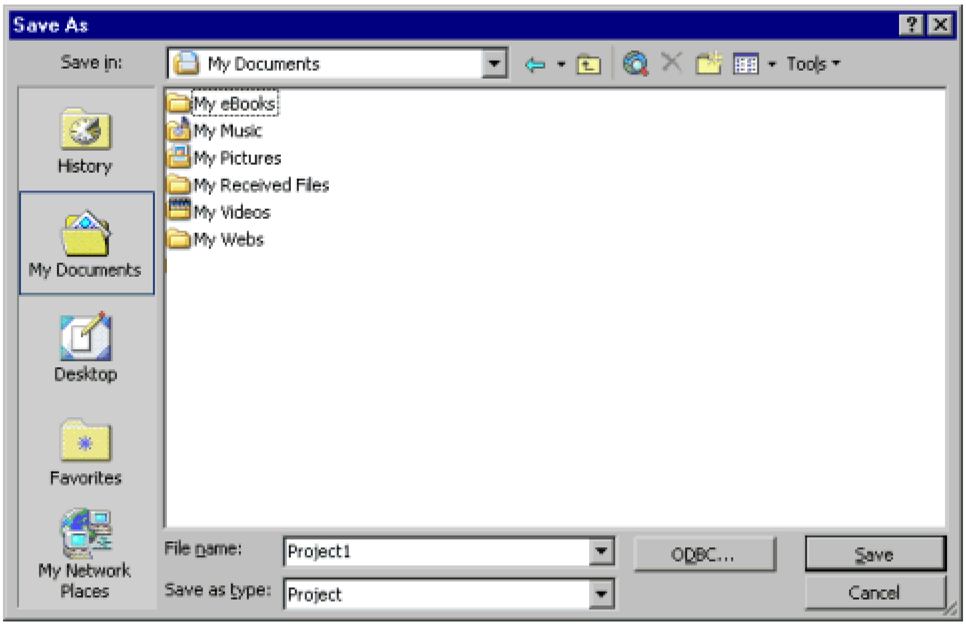
Saving Your Project

- 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**

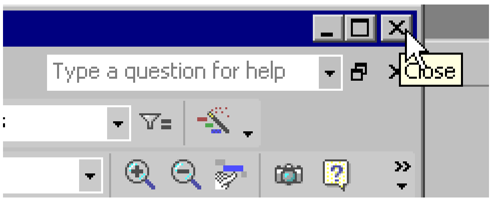
  OR click on **Close Window** [**x**] button on upper right hand corner of the **Project window**:

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

Quitting Project 2002

- 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?

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

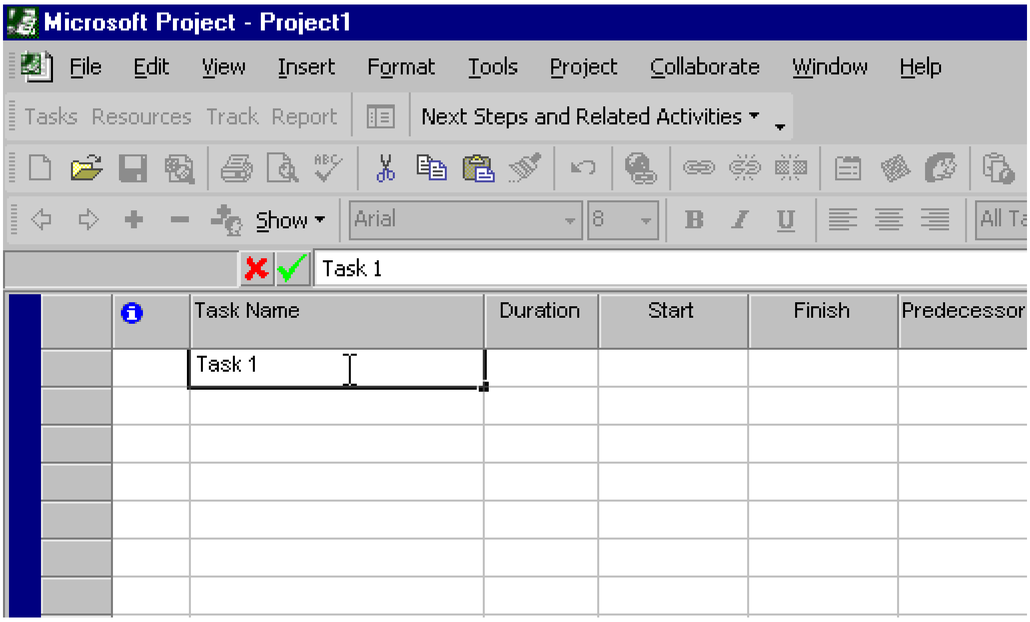
Entering Tasks

- Tasks are the specific activities that must be completed in order to finish your project (i.e. 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.

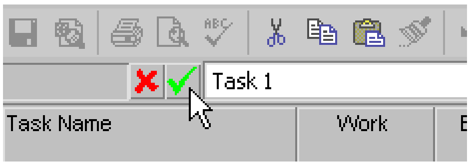
Entering Tasks

- 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 **green check mark** in the **entry bar** or by moving to another cell:



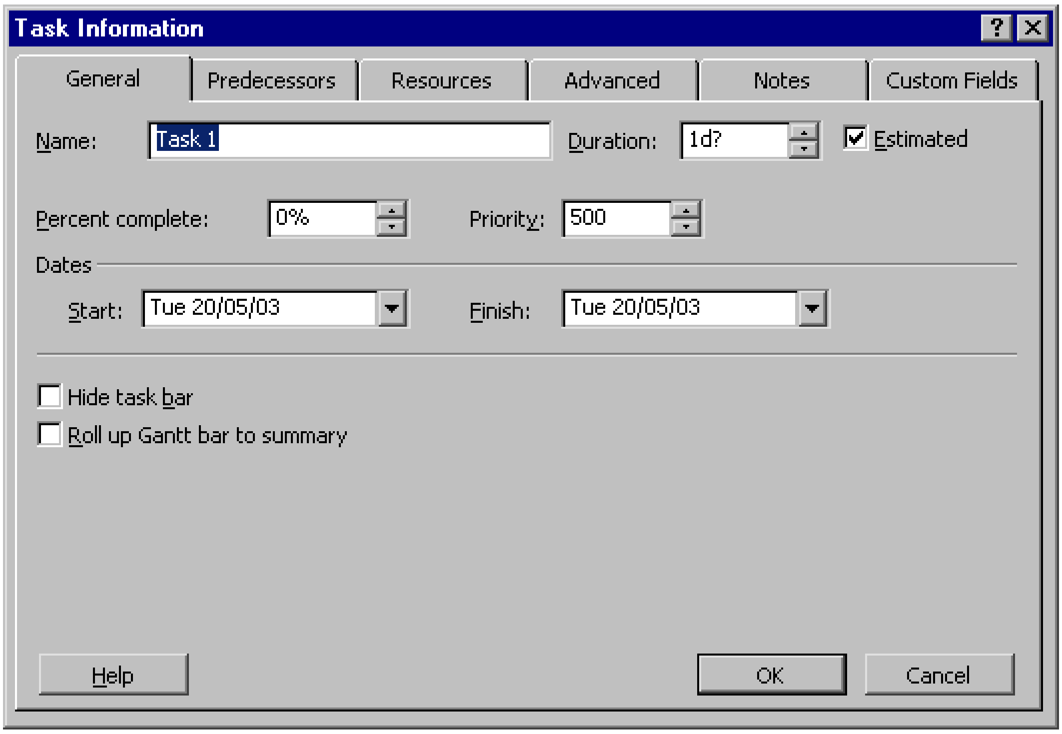
- After you accept the information, the task is assigned an **ID number** that is displayed in the far left column.

- 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.
- 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:

- 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

- 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.
- 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 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, and thereby reduce 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?	Tue 20/05/03	Tue 20/05/03
2		Task 2	1 day?	Tue 20/05/03	Tue 20/05/03
3		Task 3	1 day?	Tue 20/05/03	Tue 20/05/03
4		Task 4	1 day?	Tue 20/05/03	Tue 20/05/03

- 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
1		Task 1	1 day?
2			
3		Task 2	1 day?
4		Task 3	1 day?
5		Task 4	1 day?

- 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 and select **Indent** from the drop-down menu.

- The higher-level task becomes the summary task:

		Task Name	Duration	Start	Finish
1		**⊟ Task 1**	**1 day?**	**Tue 20/05/03**	**Tue 20/05/03**
2		Subtask 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

Creating a Summary Task

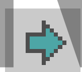
- Alternately, you can choose to group the tasks you have already entered under a summary task.
- Insert a row by highlighting the row directly below where you want to create a summary task:

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

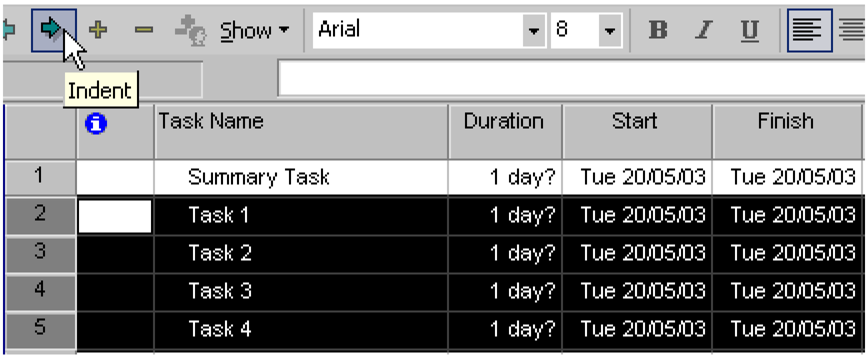
- To create a new row, from the main menu, choose **Insert > New Task**

  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 that 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:



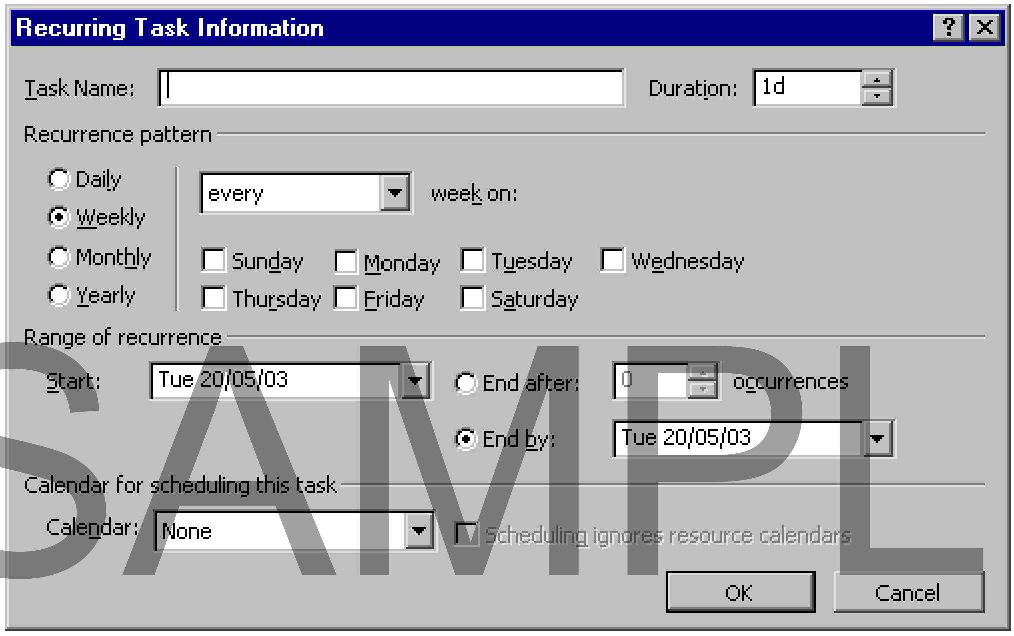
Using Recurring Tasks

Entering Recurring Tasks

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

Using Task Notes

Entering Task Notes

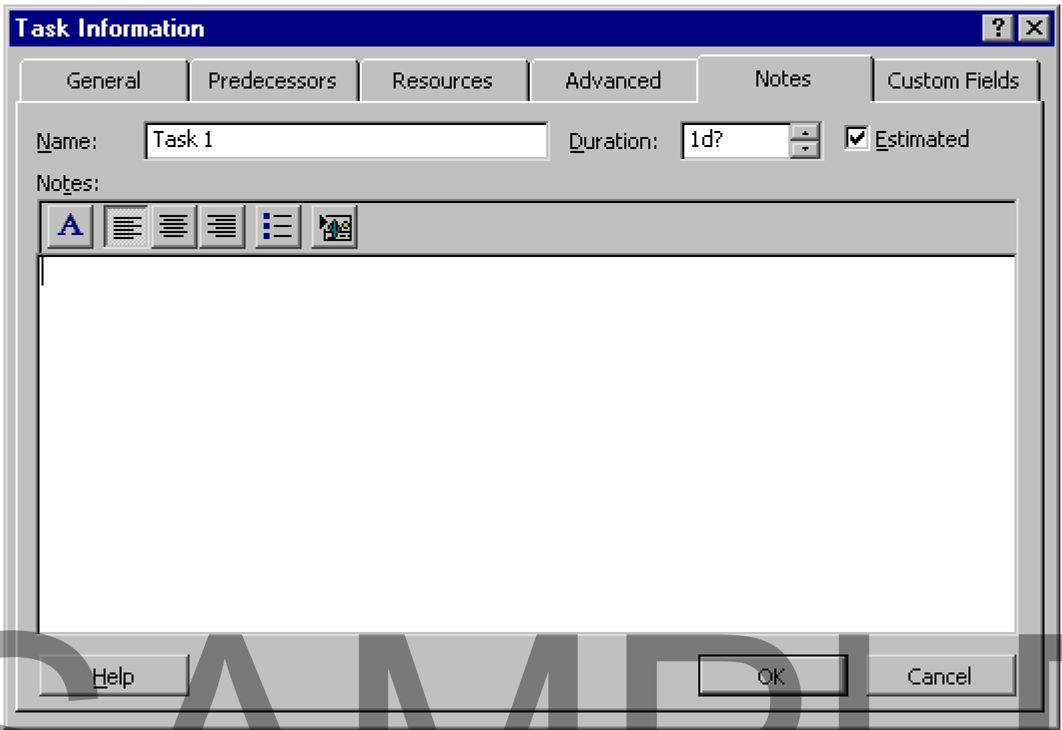
- Notes can be attached to a task to quickly display information regarding anything related to it. Notes can be displayed onscreen and included in printed reports.

To enter a Task Note:

- 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:

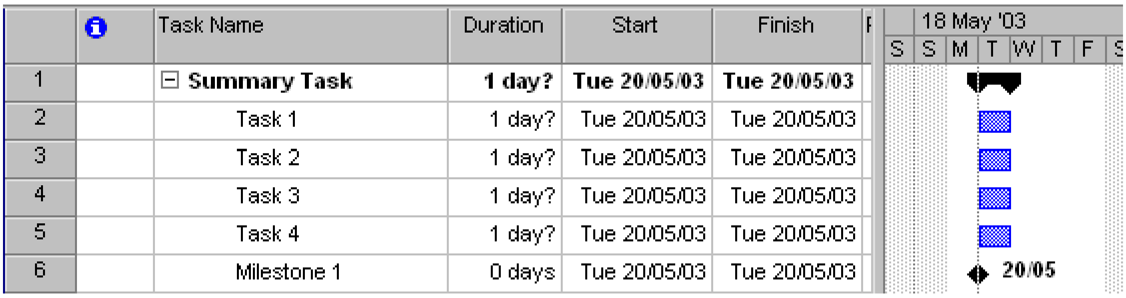


- Use the area provided to enter your notes. You can use the formatting tools provided to format your note.
- Click **OK** to save and attach the note to your task.

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 that has a duration a milestone.
- Milestones are marked with a diamond in the Gantt Chart view:

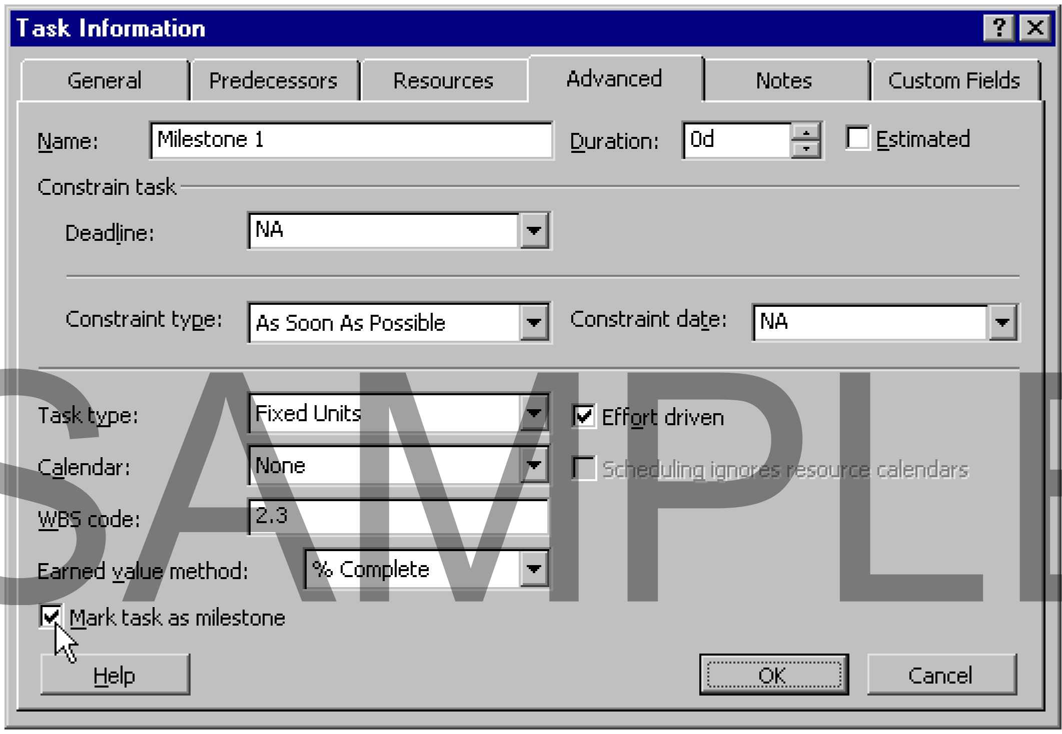


To create a Milestone:

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

  OR

- Highlight 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:



Entering Constraints

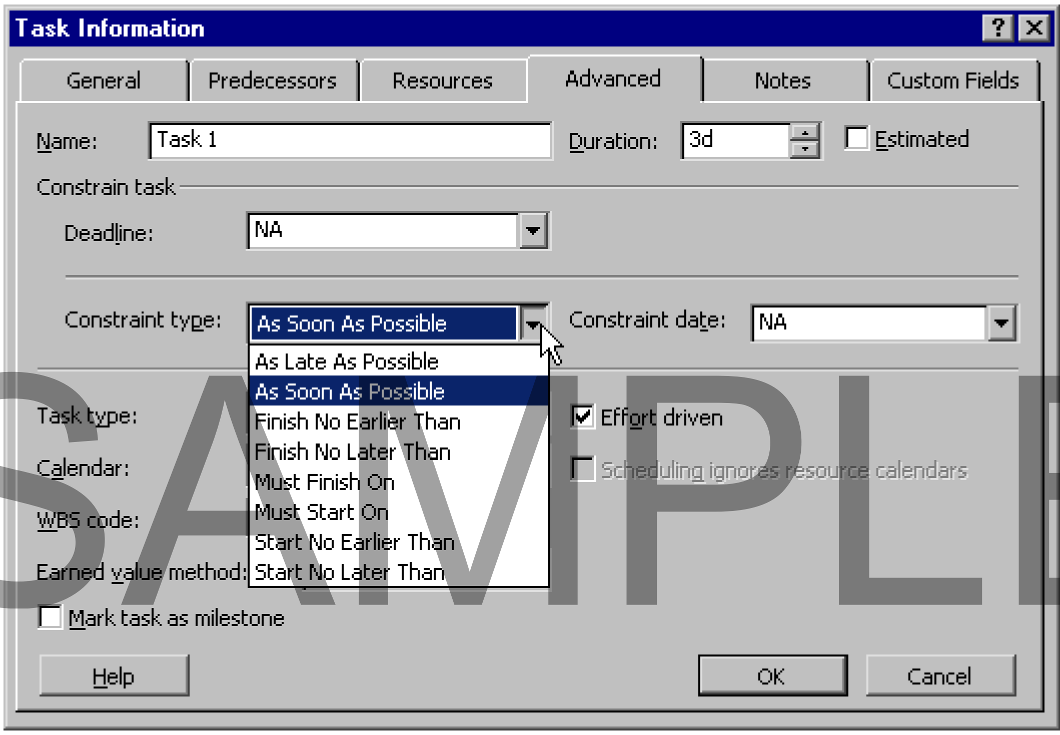
Adding Constraints

- A constraint is a parameter placed upon a task that 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 that 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:



- 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:

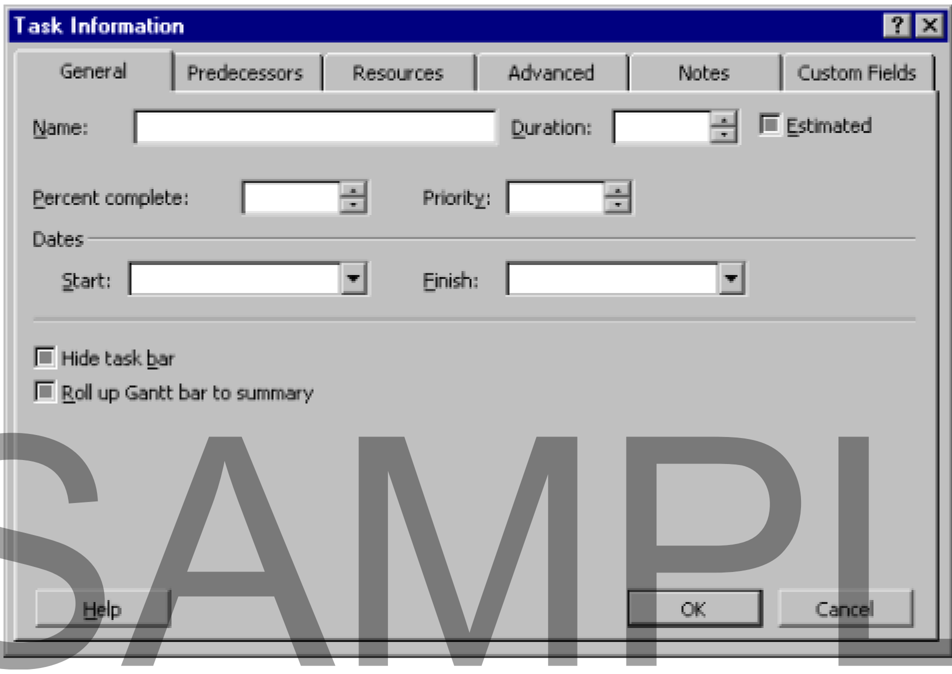
- Click the down arrow on the right of the **Deadline** field in the **Advanced** tab of the **Task Information** dialog box and choose a date from the drop-down calendar

  OR type in the date using the dd/mm/yyyy format.

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

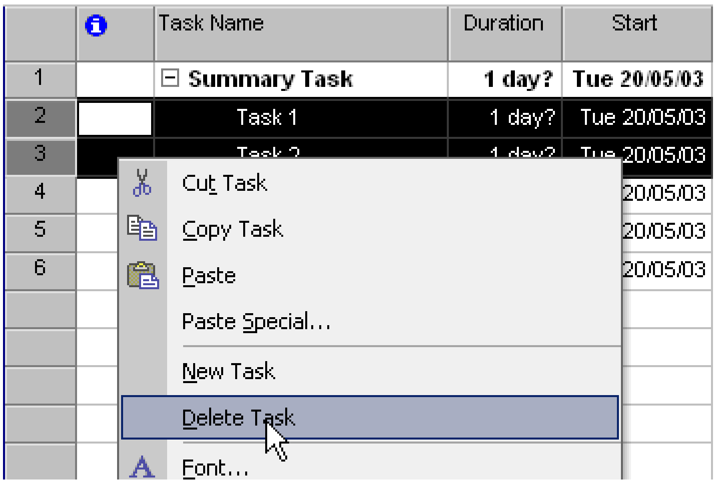
- Occasionally you will need to delete tasks either because they were entered in error or they are no longer relevant. There are several ways to do this.

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 that you would like to move.
- 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 outdent 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.

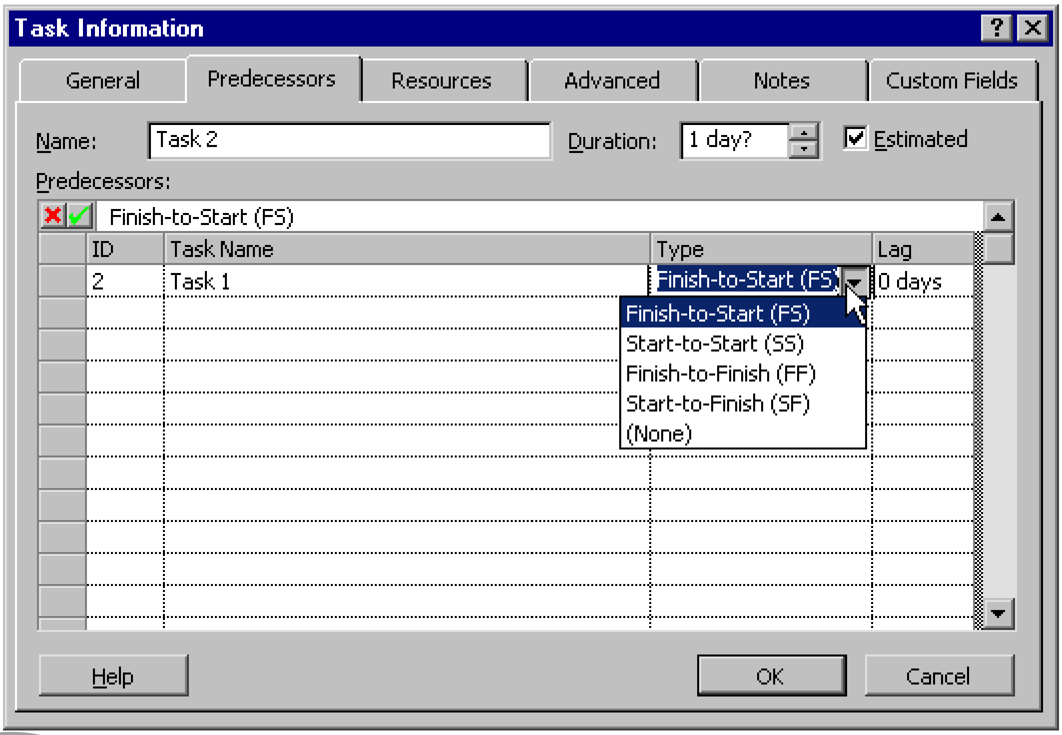
- There are two types of tasks in a dependency. A **predecessor** task must occur before another task. A **successor** task must occur after another task.
- There are four different types of dependencies (or linkages) that will be discussed in detail.

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:

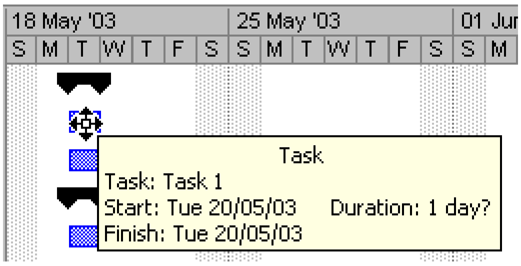
- There are a few different ways to establish a **finish to start** dependency.
- Use the **Predecessors** tab in the **Task Information** dialog box:



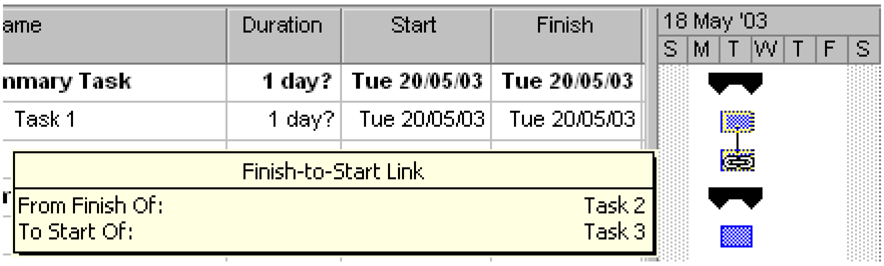
- Click on the down arrow at the right side of the **Task Name** column to select the name of the task you would like to set as the predecessor.
- Choose the type of dependency from the drop-down menu of the **Type** column.
- Click **OK**.

  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:



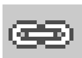
- Click and drag the mouse pointer to the task that you would like to make the successor. The cursor becomes a link symbol and an information box is displayed describing the link you are creating:



- 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 **Link Tasks** icon  on the **Standard** toolbar

OR press the **Ctrl + F2** key combination.

Using Start-to-Finish (SF) Dependencies

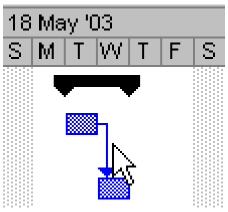
- In a **start-to-finish** dependency, the successor task is completed after its predecessor starts. In other words, the successor task cannot finish until the predecessor task starts. The start to finish relationship is rarely used, although it may be necessary in unusual instances.

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

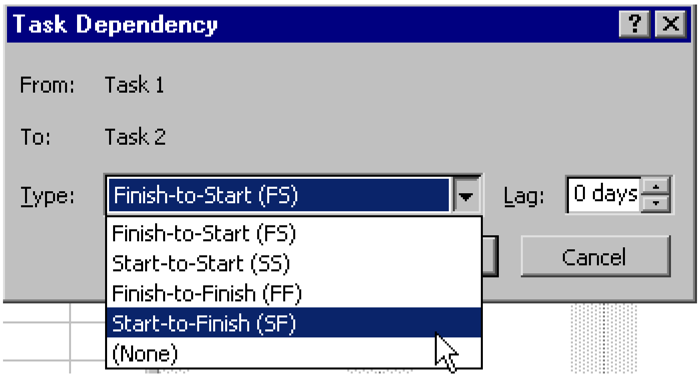
- Use the **Predecessors** tab in the **Task Information** dialog box (as outlined in the previous section) to set this link.

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**.

Note: The two methods described above are the same methods also used to create the **Start-to-Start** and **Finish-to-Finish** dependencies.

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 has to have started in order for the successor to start.
- To create a Start-to-Start dependency, refer to steps for creating a start-to-finish relationship. Select the **Start-to-Start** option from the drop-down list.

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.
- To create a Finish-to-Finish dependency, refer to steps for creating a start-to-finish relationship. Select the **Finish-to-Finish** option from the drop-down list.

Review Questions

How would you:

- 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?

Resources

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

- Create a resource list
- Enter working time
- Enter costs
- Enter notes
- Assign resources to a task

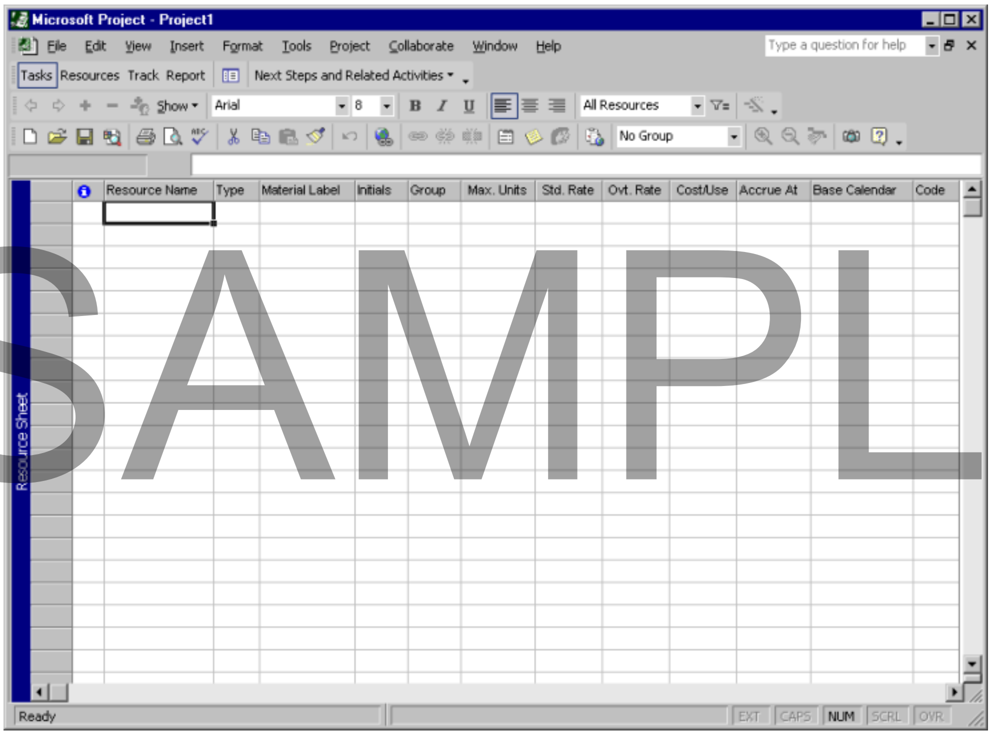
Creating a Resource List

Creating Resources

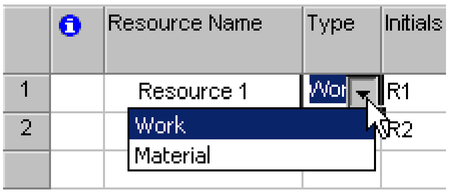
- Resources are **people**, **supplies** and **equipment** that you need to use to accomplish your tasks and goals.
- Project uses the resource information you provide to make the schedule for your project. Typically, the more resources you assign, the shorter the duration of the project will be because a task is completed faster when there are more people or materials assigned to it.

To create a Resource:

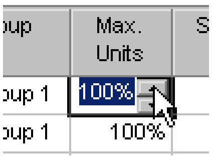
- One of the best ways to enter resources is by using the **Resource Sheet** view.
- To open the **Resource Sheet** view, from the main menu, choose **View > Resource Sheet**:



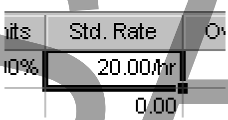
- Enter a descriptive name for the resource in the **Resource Name** field. This can be a worker's name, a job title, or the name of a material.
- Click on the down arrow in the **Type** field and choose the type of resource. Project allows you to choose either **Work** (human resources) or **Material**:



- If the resource is a material resource, enter a unit of measurement in the **Material Label** field. This could be minutes, gallons, miles etc. depending on the type of material you are using. If your resource is **Work**, you can leave this field empty.
- Enter the initials of the resource in the **Initials** field. Project enters the first letter of the resource name as the default, but you can customize it if you prefer.
- Enter the group name in the **Group** field if you would like the resource to belong to a group. Remember to spell the group name exactly the same every time you type it. Groups will be discussed later in the chapter.
- Enter the percentage of working time a resource can contribute to the project in the **Max. Units** field. For example, if a resource can work full-time, you would enter 100%. If the worker can only work part-time, you would enter 50%, or whatever percentage would be appropriate. Project uses 100% as the default in this field:



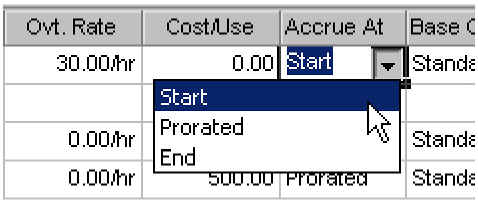
- Enter the rate the resource would normally cost in the **Std. Rate** field. Although Project uses hours as the default, you can also enter the rate in minutes, days, weeks or years. To change the unit, type the **amount**, followed by a **slash**, and the **first letter** of the unit:



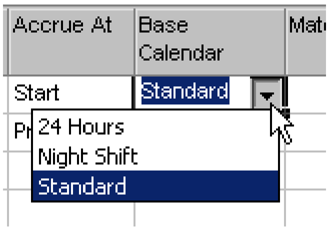
- Enter the rate the resource would cost for overtime work in the **Ovt. Rate** field. Once again, Project uses hours as the default, but you may change the unit if you wish.
- Enter the flat rate a resource would cost in the **Cost / Use** field. Use this when a resource is not charged on a time related basis (such as a material cost).

- Select the way you would like Project to calculate the cost of a resource in the **Accrue At** field. There are three choices:

Start - Project calculates the entire cost of the resource as soon as the task begins.
Prorated - Project calculates the cost throughout the project.
End - Project calculates the entire cost of the resource when the task is complete:



- Select the calendar you would like to base the resource's time on from the drop-down list in the **Base Calendar** field. Project uses the **Standard** calendar as the default:



- Enter a code in the **Code** field if you wish. It can help you later to organize, sort or filter your information.

Entering Working Time

Entering Working Time

- The base calendar that you choose for a resource determines its availability. You can customize a resource's calendar if necessary (i.e. Blocking off vacation time).

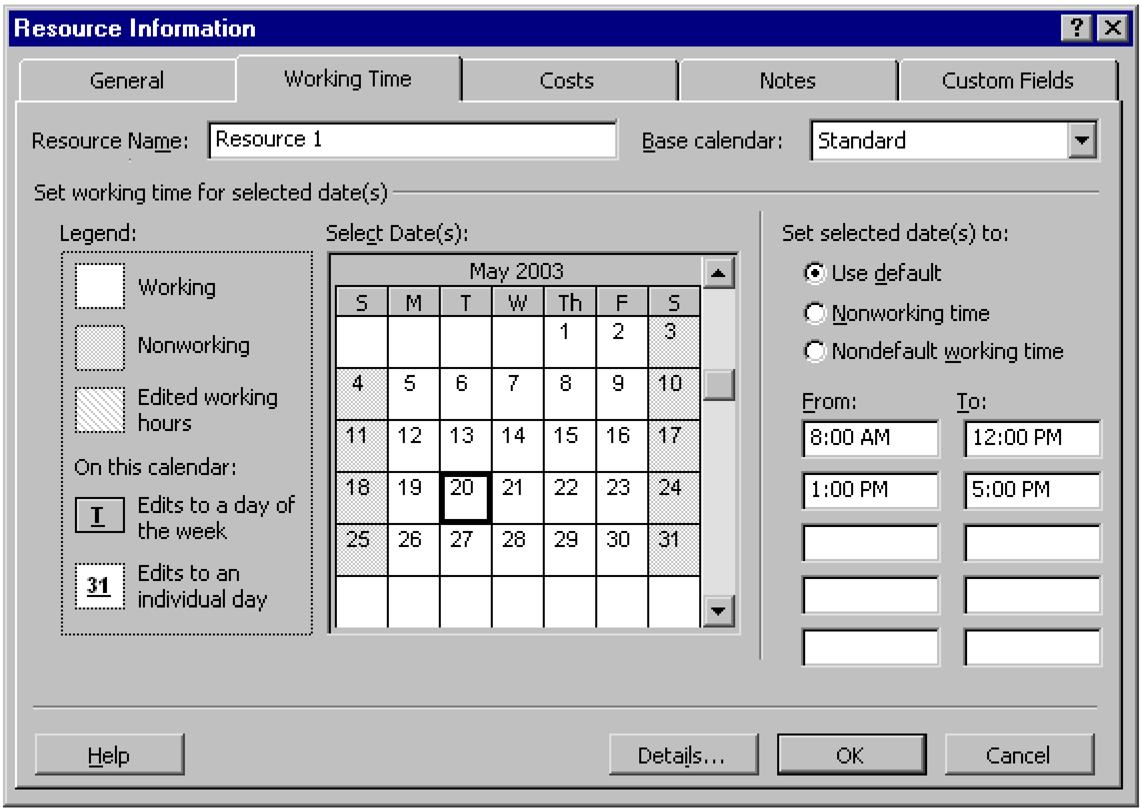
To customize Working Time:

- In the Resource Sheet view, choose **Project** > **Resource Information** to open the Resource Information dialog box

  OR double-click on the resource

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

- Click on the **Working Time** tab if it is not already displayed:



- Adjust the calendar to your specifications.

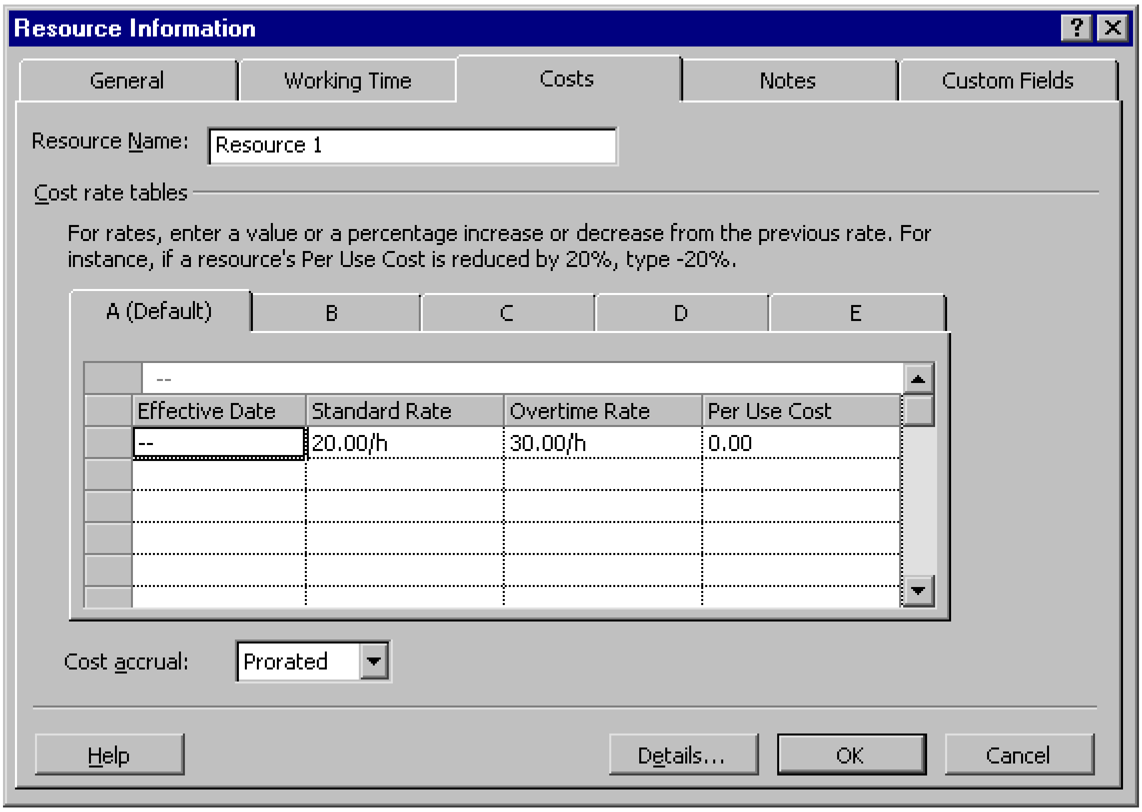
Entering Costs

Entering Rates

- It is important to enter rates for a resource, even if they are estimates, as this allows Project to calculate the overall cost of a project.
- The cost of a resource may increase or decrease during the life of your project, and you need to be able to reflect these changes.
- Project allows you to enter up to 125 different cost rates for a resource and specify the date at which the new rates takes effect.

Editing Resource Costs

- Open the **Resource Information** dialog box.
- Click on the **Costs** tab.
- Enter additional information in the **Cost rate table** section of the **Costs** tab. You may enter 25 rates and dates in each of the five tabs in the **Cost rate tables** section:



Entering Notes

Entering Notes

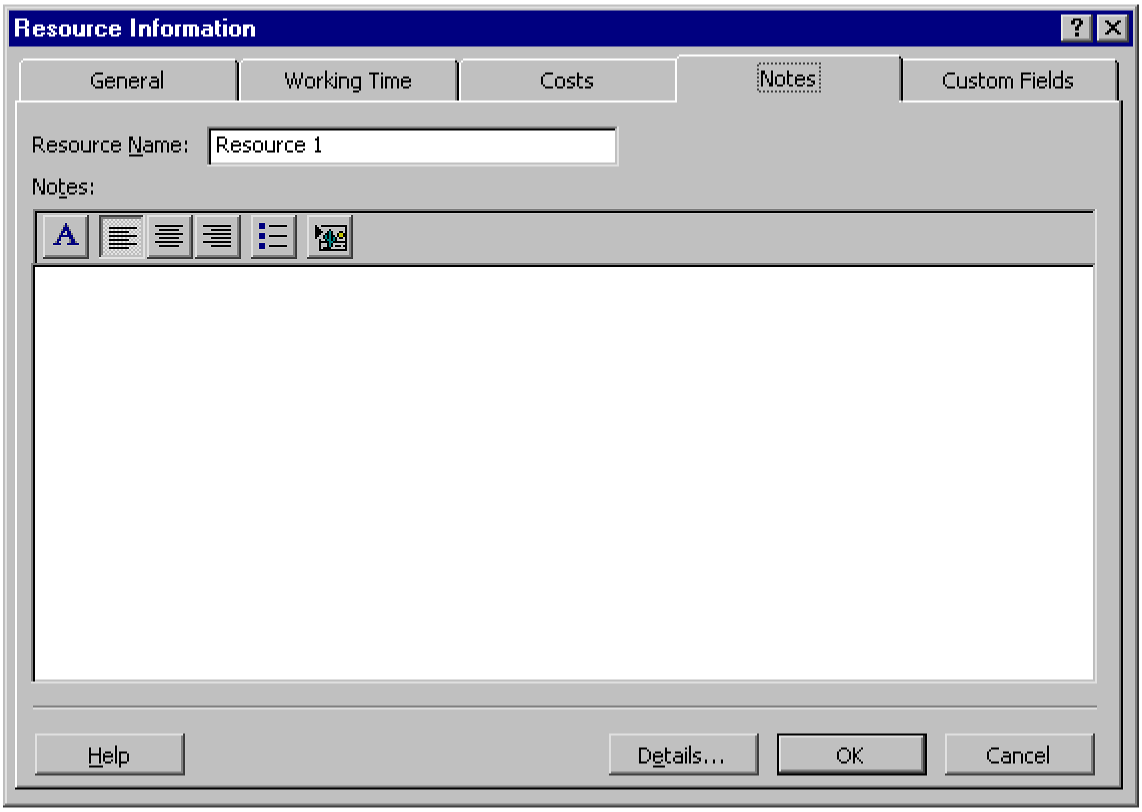
- You use resource notes in much the same way as task notes. They allow you to attach readily available, additional information to a resource.

To enter a Resource Note:

- In the **Resource Sheet** view, choose **Project > Resource Notes**

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

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

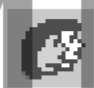


- Use the area provided to enter your notes. You can use the formatting tools provided to format your note.
- Click **OK** to save and attach the note to your resource.

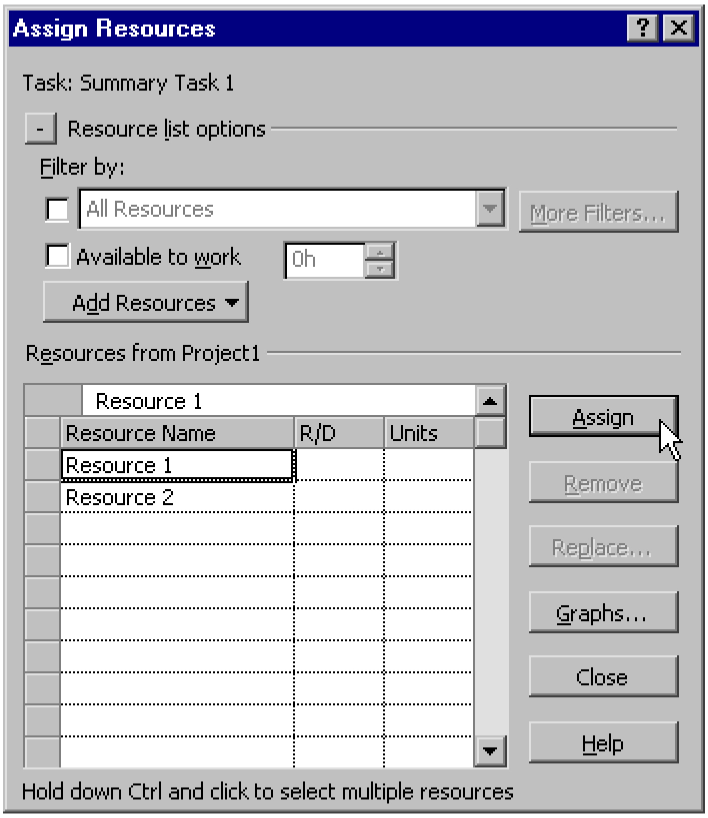
Assigning Resources to a Task

Assigning with the Assign Resources Dialog Box

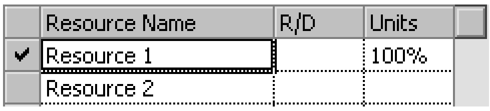
- In the **Gantt Table** view, click on the task you would like to assign the resource to.
- To open the **Assign Resources** dialog box, from the main menu, choose **Tools > Assign Resources**

  OR click on **Assign Resources** icon  on the **Standard** toolbar

  OR press the **Alt + F10** key combination:



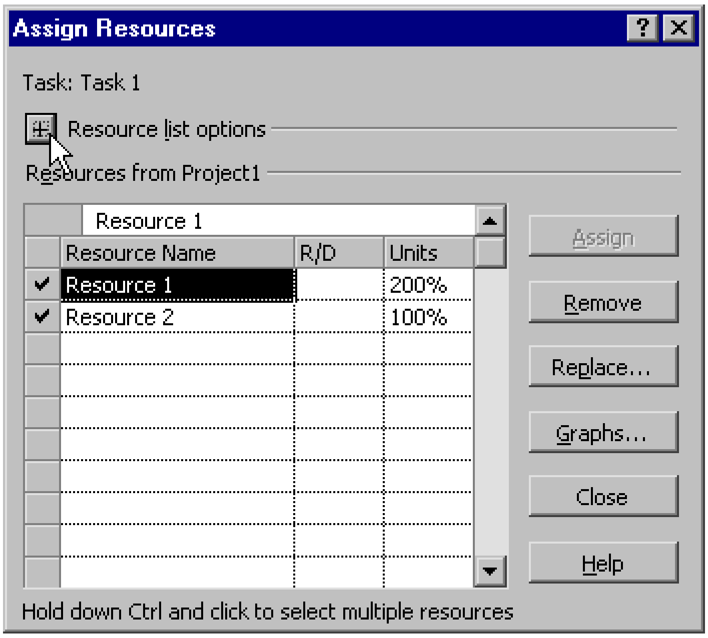
- **Highlight** the resource you would like to assign and click on **Assign**.
- A **check mark** will appear to the left of the resource when it has been assigned:

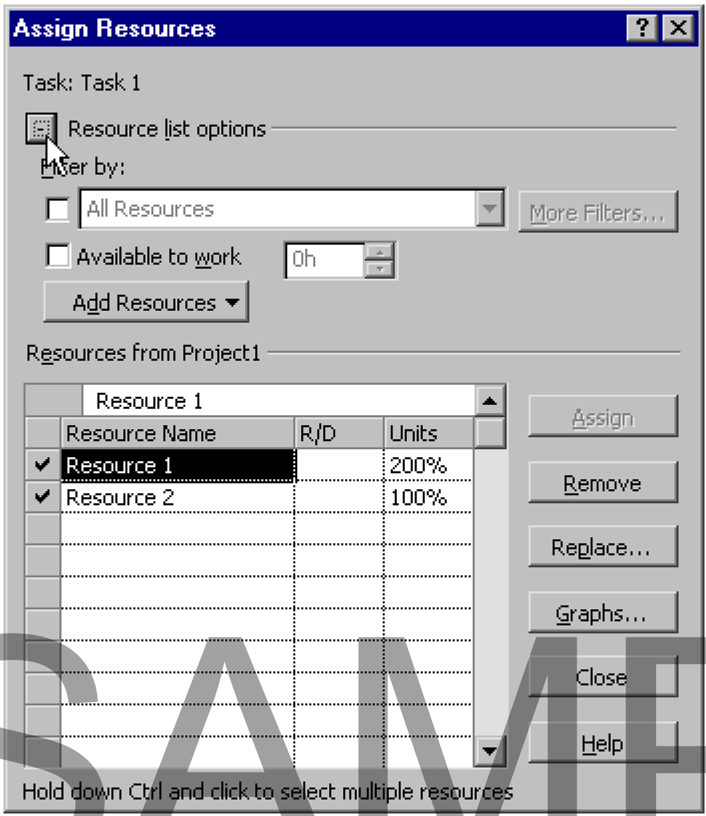


- The **R/D** column is only used if you are using Project Server.
- Project automatically sets the **Units** to 100%, but you may assign any percentage of use to the resource.

Using the Resource List Options

- There are several tools available to assist you in choosing which resource to assign to a certain task.
- In the **Assign Resources** dialog box, expand the **Resource list options** section by clicking on the plus sign button:





- This allows you to filter your resources to meet the criteria you specify.
- If you check the **Filter by** box, you can select a filter from a long list provided by project, or create your own filter by clicking on **More Filters**.
- If you check the **Available to work** box, you can enter the number of hours you would need a resource. Project then searches and calculates remaining time for a resource. Resources that are available for the same or greater amount of hours specified will appear in the list.

- If you click on the **Add Resources** button, you can select a resource from an outside source:

Assigning in the Gantt Table View

- It is easy to assign resources using the Gantt Table view, although the detailed information in the Assign Resources box cannot be entered.

To assign a resource in the Gantt Table view:

- Select the task you would like to assign a resource to.
- Click on the down arrow in the **Resource Names** field.
- Select the resource you would like to assign from the drop-down menu:

		Task Name	Duration	Start	Finish	Predecessors	Resource Names
1		**⊟ Summary Task**	**2 days?**	**Tue 20/05/03**	**Wed 21/05/03**		
2		Task 1	1 day?	Tue 20/05/03	Tue 20/05/03		Resource 1
3		Task 2	1 day?	Wed 21/05/03	Wed 21/05/03	2	Resource 2
4		**⊟ Summary Task 2**	**1 day?**	**Tue 20/05/03**	**Tue 20/05/03**		
5		Task 3	1 day?	Tue 20/05/03	Tue 20/05/03		
6		Task 4	1 day?	Tue 20/05/03	Tue 20/05/03		
7		Milestone 1	0 days	Tue 20/05/03	Tue 20/05/03		

Review Questions

How would you:

- Create a resource list?
- Enter working time?
- Enter costs?
- Enter notes?
- Assign resources to a task?

Views

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

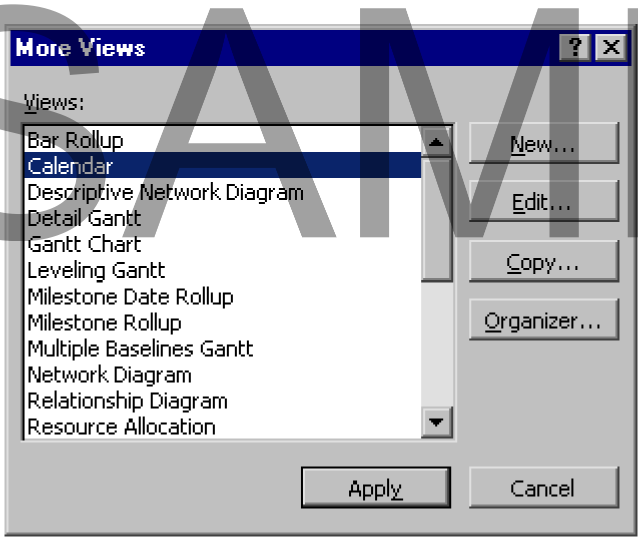
- Use the calendar view
- Use the Gantt Chart view
- Use the network diagram view
- Use the task usage view
- Use the tracking Gantt view
- Use the resource graph view
- Use the resource sheet view
- Use the Resource usage view

Introduction to Views

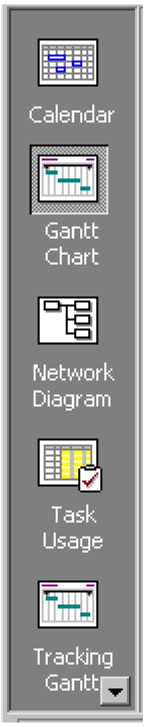
- Now that you are familiar with the basics of Project and know how to enter the components of a project, you must learn how to view the information. The different views in Project allow you to see the project from a variety of perspectives and focus on different aspects. This allows you to understand and visualize your project better.
- You can use most views to enter and edit information, although some views can only display information.
- All views are made up of three basic components:

  Chart or graph - information is represented by pictures.
  Sheet - information is represented in a table format, similar to a worksheet.
  Form - information about a single item is represented as it might be on a paper form.

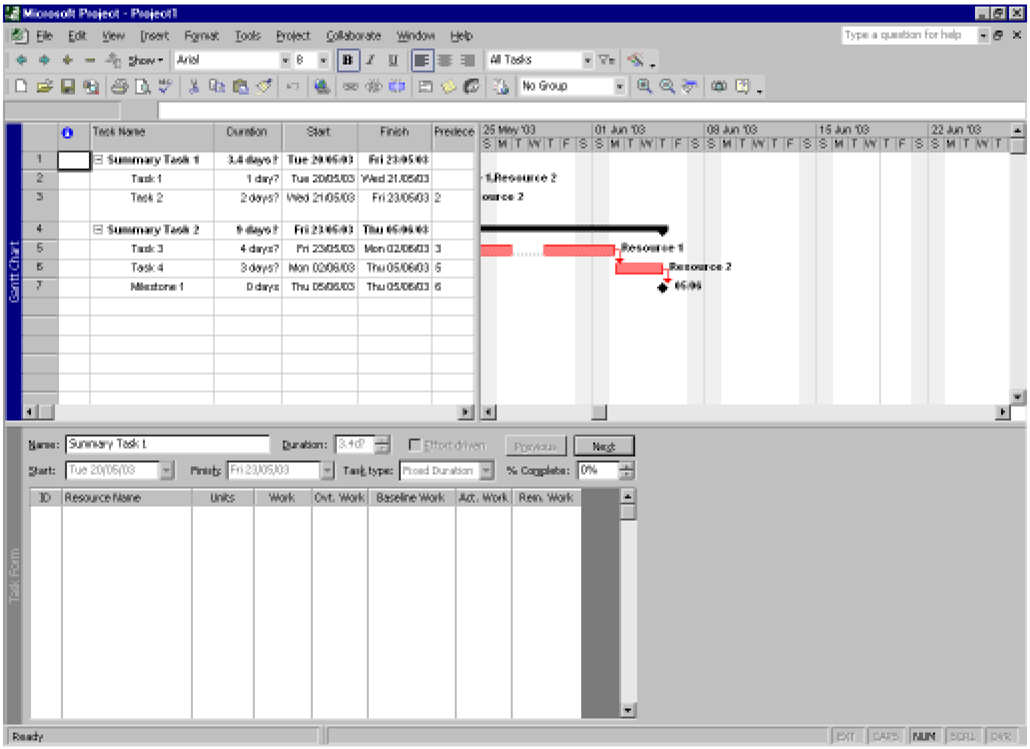
- Views can be accessed by selecting **View** from the main menu. The most common views are listed in the drop-down menu. All other views (all 27 of them!) can be accessed by selecting **View > More Views** from the main menu. The **More Views** dialog box opens, which allows you to **create**, **edit**, **copy**, **organize** and **apply** any view:



- A quick way to access the common views is using the **View Bar**. It is a toolbar that contains icons for eight views and an icon to access **More Views**:



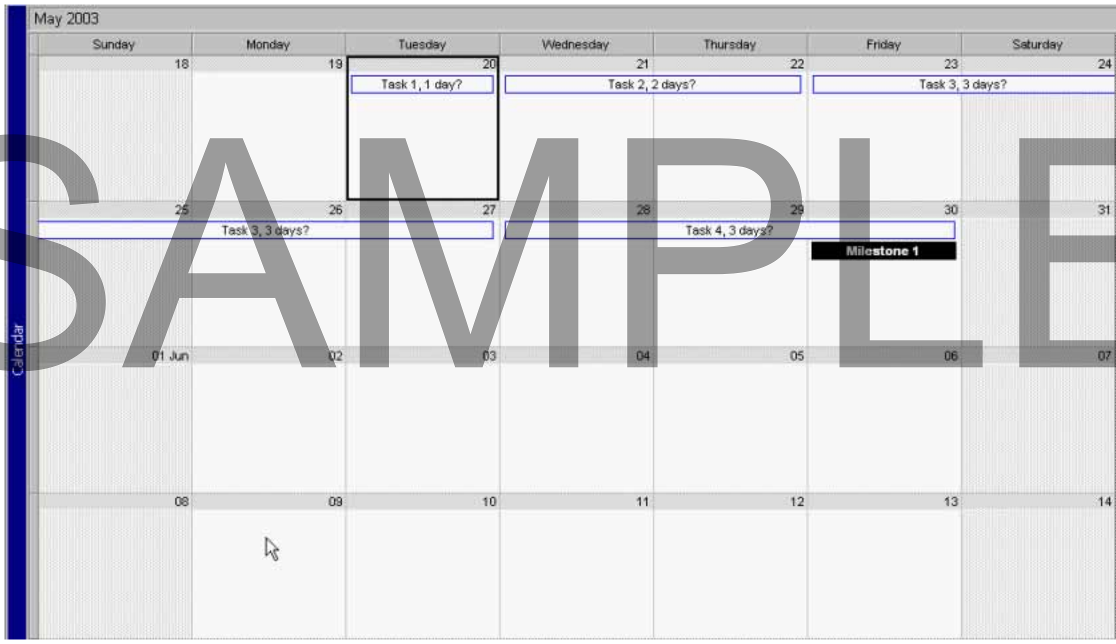
- To show/hide the **View Bar**, from the main menu, choose **View > View Bar**. A check mark will appear beside **View Bar** if it is selected, and it will be displayed vertically on the left side of the window.
- The window can be split in order for you to see more than one view at a time or use views in combination. To split the window, from the main menu, choose **Window** > **Split**. The window will be divided into two parts. You can then select the view you would like to see in each of them by clicking in either the top or bottom portion of the window and selecting a view to be displayed in that portion of the window:



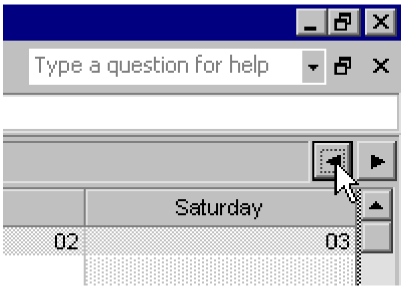
Using the Calendar View

Applying the Calendar View

- The calendar view is useful for a general overview of what needs to be done on a specific day.
- The calendar view uses a monthly format to show scheduled tasks:



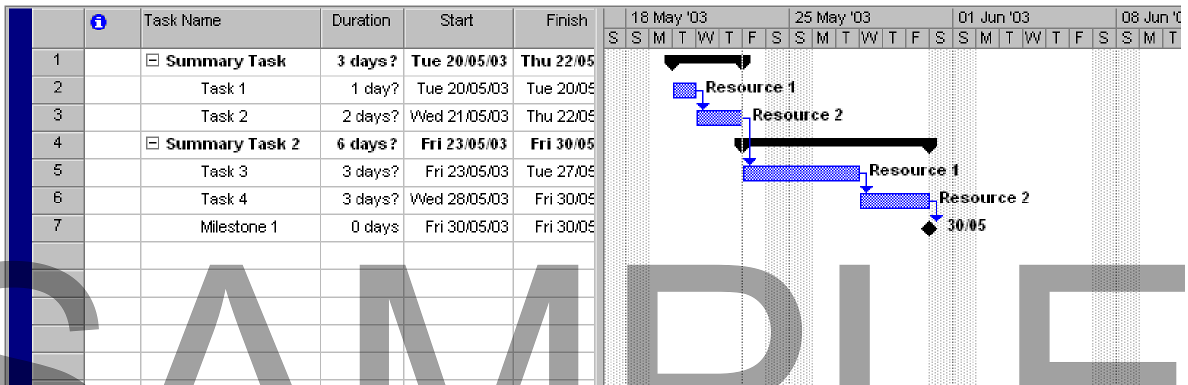
- A black box surrounds the current date.
- **Tasks** are shown by a bar stretching over the amount of days allocated for the task.
- A solid black bar shows **milestones**.
- You can scroll through the months by using the arrow buttons on the top right corner of the windows:



Using the Gantt Chart View

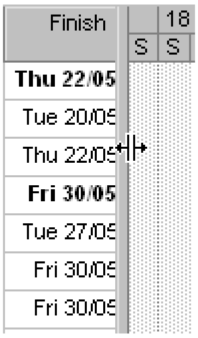
Applying the Gantt Chart View

- The **Gantt Chart** view is useful for entering task information and viewing the timing and relationship between tasks.
- The **Gantt Chart** View is the default view. It consists of the **Gantt table** (on the left) and the **Gantt Chart** (on the right). The Gantt table is made up of columns of information, and the Gantt Chart is the graphic representation of the information entered:

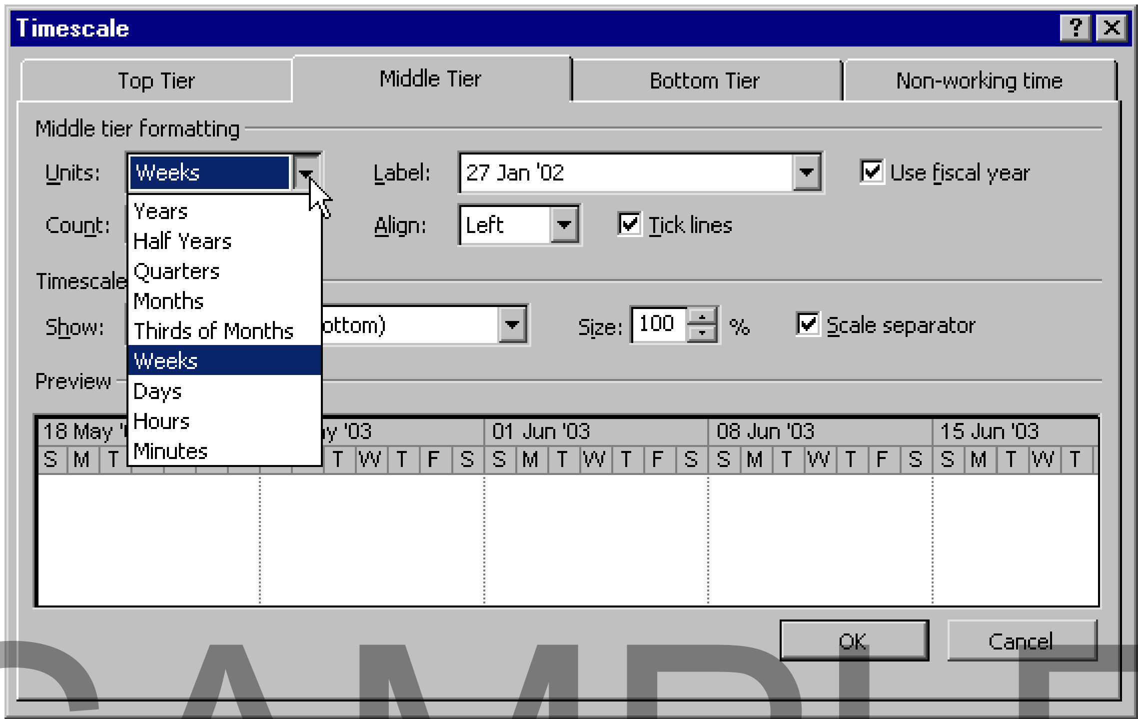


	Task Name	Duration	Start	Finish
1	Summary Task	3 days?	Tue 20/05/03	Thu 22/05
2	Task 1	1 day?	Tue 20/05/03	Tue 20/05
3	Task 2	2 days?	Wed 21/05/03	Thu 22/05
4	Summary Task 2	6 days?	Fri 23/05/03	Fri 30/05
5	Task 3	3 days?	Fri 23/05/03	Tue 27/05
6	Task 4	3 days?	Wed 28/05/03	Fri 30/05
7	Milestone 1	0 days	Fri 30/05/03	Fri 30/05

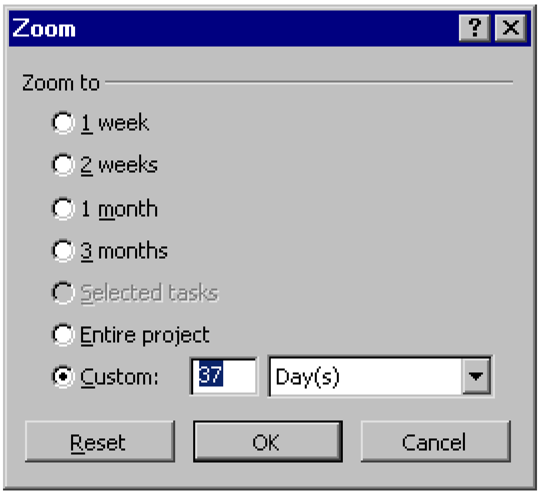
- The two windows can be resized so that you can view a larger or smaller portion of the window. To resize, simply hover your mouse cursor over the grey vertical divider until it becomes two lines with arrows pointing outward. Click and drag the line until it is in the position you desire:



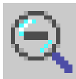
- The **timescale** at the top of the Gantt Chart is set to show weeks (in the middle tier) and days (in the bottom tier) as the default. However, you can adjust it to show any timescale you wish. Double-click on the timescale to open the **Timescale** dialog box. You can also use the **Timescale** dialog box to format any tier on the time scale. A **preview** of your changes is shown in the bottom portion of the dialog box:



- You can zoom in or out to view larger or smaller time increments in the Gantt Chart. To zoom in or out, from the main menu, choose **View > Zoom**. The **Zoom** dialog box is displayed:



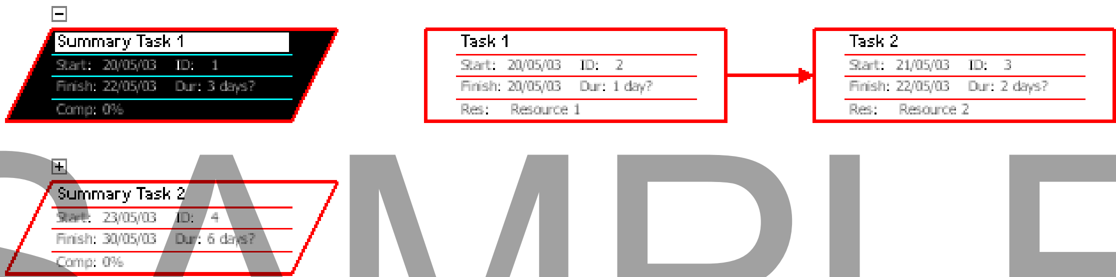
- Select an option from the list or use the **Custom** option to create your own.
- Click **OK**

OR use the **Zoom In**  or **Zoom Out**  icons on the **Standard** toolbar.

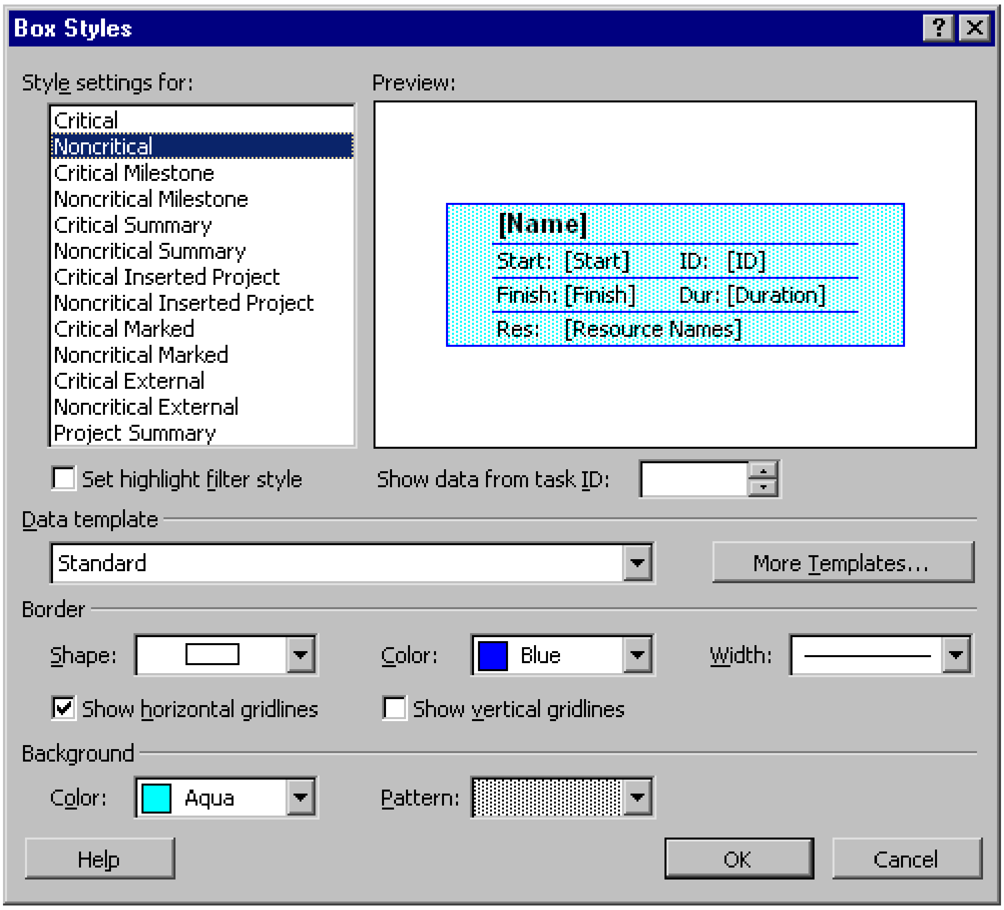
Using the Network Diagram View

Applying the Network Diagram View

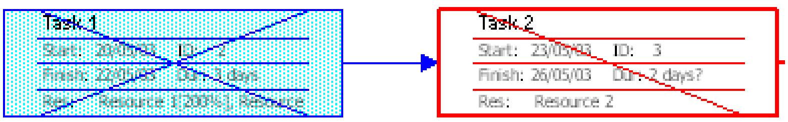
- The **Network Diagram** view is useful for analyzing the general workflow and relationships between tasks. The **Network Diagram** view replaced the **PERT** chart in older versions of Project:



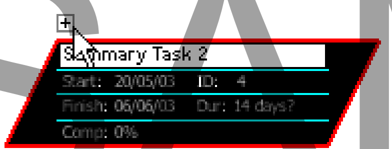
- It is a flowchart made up of **nodes**. Each **node** represents a task, and contains the **task name**, **duration**, **task ID**, **start date**, **finish date** and **resources** (if a resource has been assigned).
- Different shaped nodes represent different types of tasks. You can determine the meaning and change the format of the shape by choosing **Format > Box Styles** from the main menu. The **Box Styles** dialog box opens with available options:



- If a task is in progress, a diagonal line appears through the node, and if the task is complete, a crossed diagonal line appears:



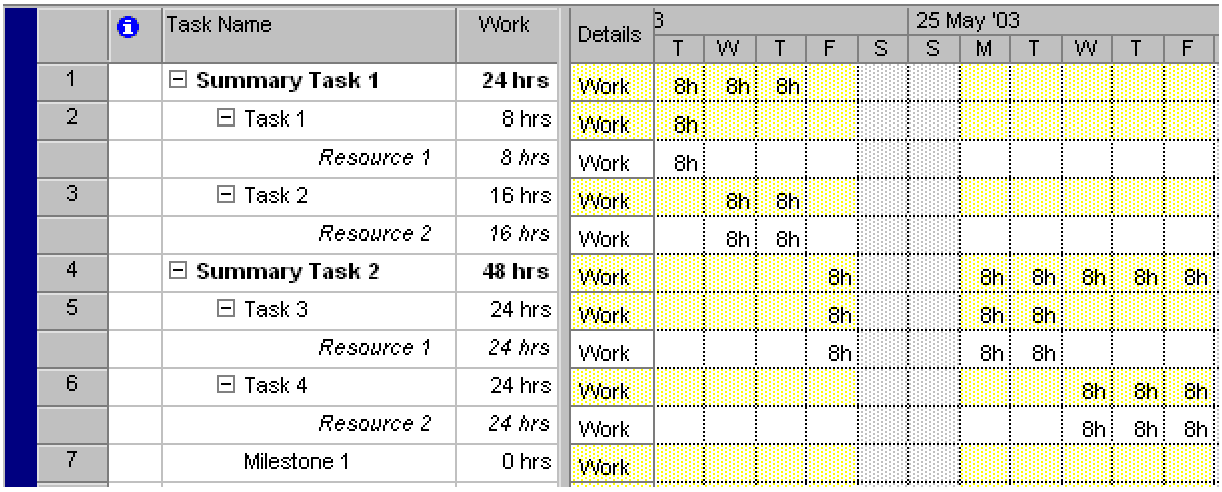
- You can show or hide details by clicking on the cross that appears on the upper left corner of a summary node:



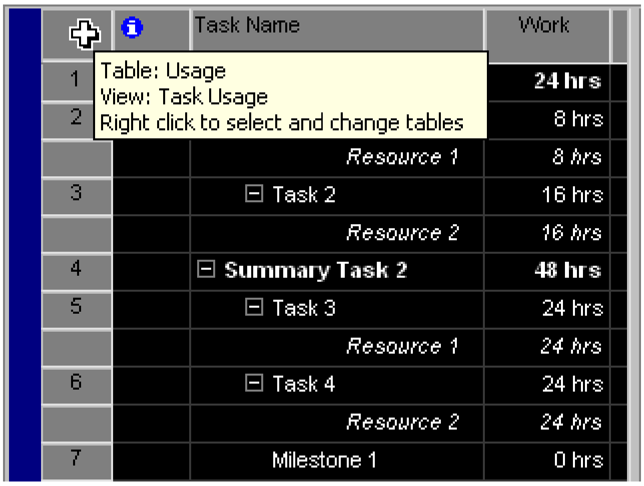
Using the Task Usage View

Applying the Task Usage View

- The **Task Usage** view is useful for showing and organizing assigned resources under each task. It is also used to set **resource work contours** (discussed in chapter seven):



- By default, the **Task Usage** table is shown in the left pane. To choose a different table, click on the **select all button** at the top left corner of the table, **right click** and select the view you wish to see:

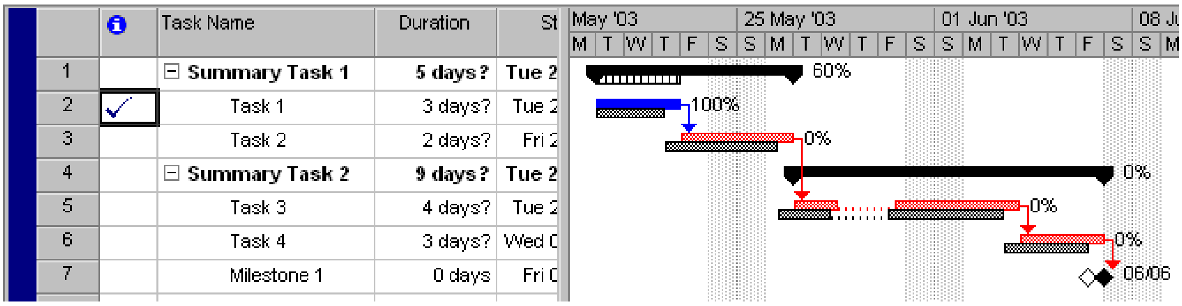


- **Work** is shown in the **Details** section in the right pane. To select different options for the **Details** section, click on the **select all button** and **right click**. This gives you access to the **Timescale**, **Zoom** and **Change Working Time** dialog boxes:

Using the Tracking Gantt View

Applying the Tracking Gantt View

- The **Tracking Gantt** View is useful for comparing the baseline schedule and the actual schedule (baseline will be discussed in chapter eight). It shows a **task list** in the left pane and the **Tracking Gantt** chart in the right:

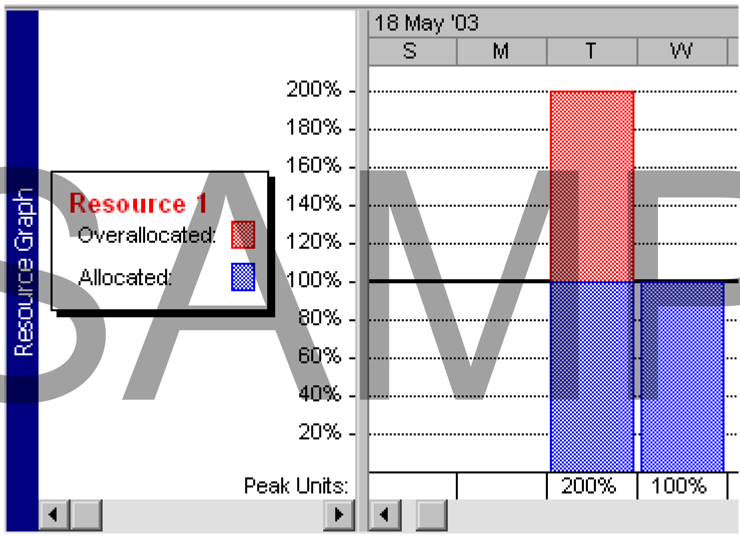


- A **black bar** in the Tracking Gantt view represents summary tasks. When a task is in progress, a striped bar appears below it, representing work done and the percentage of work done is displayed to the right of the bar.
- The Tracking Gantt View will be discussed in more detail in chapter eight.

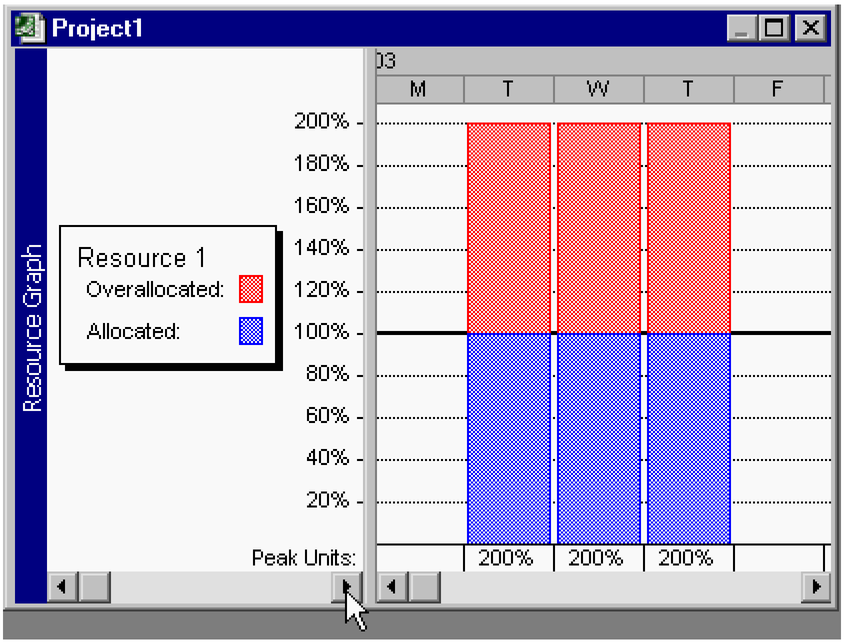
Using the Resource Graph View

Applying the Resource Graph View

- The **Resource Graph** view is useful for supplying a quick visual representation of resource allocation. It can be used to detect overallocation, percentage of total work time each resource is assigned to, and resource costs:



- You can only view one resource at a time. To look at a different resource, click on the scroll arrows at the bottom of the left pane:



- This view is especially useful when used in combination with another view (by splitting the window), as you can get an overview of your resource allocation at a glance.

End of the preview sample

CHELTENHAM
COURSEWARE

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.

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