Project 2003

Manual - Foundation Level

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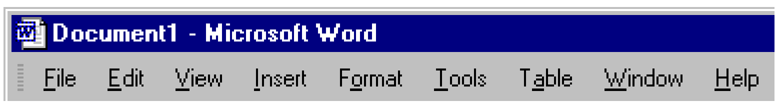
Course Basics

Toolbars

The Title Bar

- The title bar is displayed along the top of almost all program, folder and dialog box windows. It is used to display information such as the name of the application (or folder) and the document you are working on. Information which is displayed here may vary. The example shown illustrates the title bar for a program called **Microsoft Word**, in which a document called **Document1** has been opened or saved:

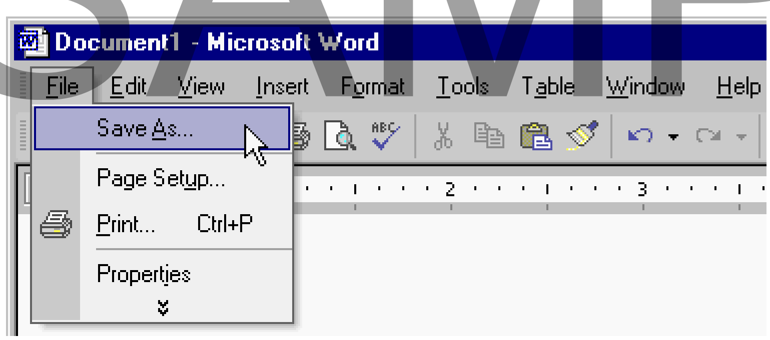


The Menu Bar

- The menu bar is located under the title bar, and contains a series of drop-down menus. The example shown illustrates the Microsoft Word Menu Bar:

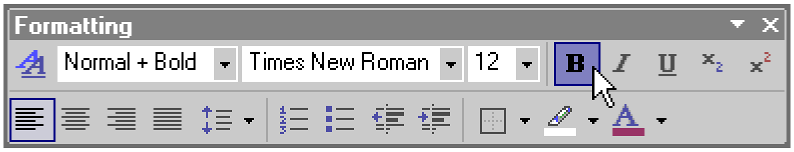
To execute Menu commands

- In most cases, you are asked to use the mouse to execute a series of menu commands (e.g., **File > Save As**). What this means is that you select **File** from the main menu, followed by **Save As**:



The Tool Bar

- The tool bar contains a series of icons, which allow you to achieve a desired effect as quickly as possible. In the example shown, taken from the Microsoft Word Formatting toolbar, to make the selected text bold, you would click on the **Bold** icon:



The Status Bar

- Most application windows have a status bar displayed along the bottom of the window. In the example illustrated, taken from Microsoft Word, the status bar conveys information about the page within the document which you are working on, along with other relevant information:

The Scroll Bar

- When a program or folder needs to display information within a window, two sets of scroll bars may be displayed along the bottom and right side of the window. By using the scroll bars it is possible to move to any position within a document and also work on a document many times bigger than your physical screen size.

To move up and down within a window (using the scroll bar)

- To scroll upwards in a window, click on the upwards-pointing arrow at the top of the vertical scroll bar: 
- To move downwards in a window, click on the downwards-pointing arrow at the bottom of the vertical scroll bar: 

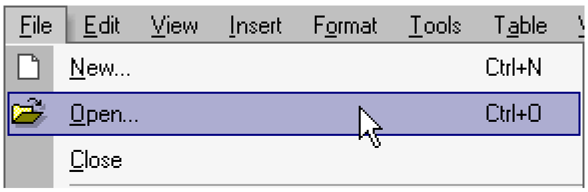
To move right to left within a window

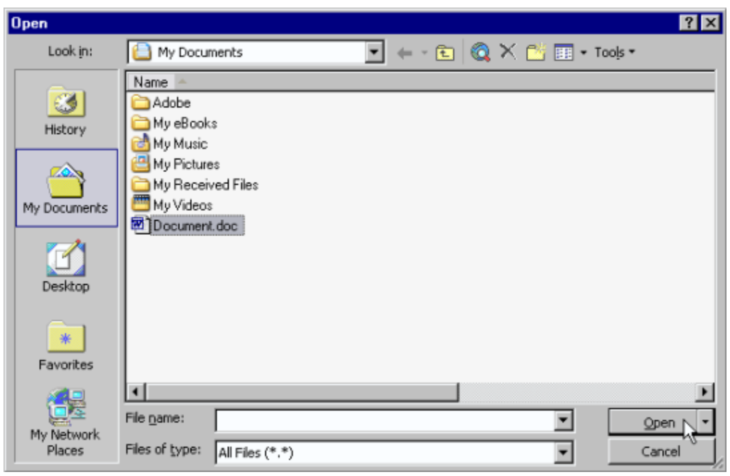
- To move to the right-hand side of a window, click on the right-hand arrow on the horizontal scroll bar: 
- To move to the left-hand side of a window, click on the left-hand arrow on the horizontal scroll bar: 

File Management

Opening Files

- From the main menu, select **File > Open** command or click on the **Open** icon and select the required file from the dialog box displayed:



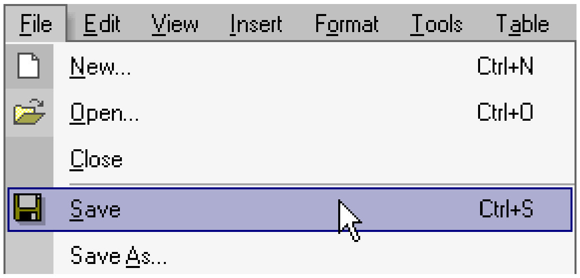


- Use the **Look in** drop-down menu to select the drive or folder which contains the file you want.
- To open the file you require either double-click on the file name or select the file name by clicking on it, and then click on the **Open** button.

Saving Files

To save a new document

- From the main menu, select **File > Save** command or click on the **Save** icon and from the dialog box displayed select the required folder. Enter a file name and then click on the **Save** button:



- After you have saved the file for the first time, clicking on the **Save** icon will automatically save your document with the filename you gave it. It does not give you the option to rename.

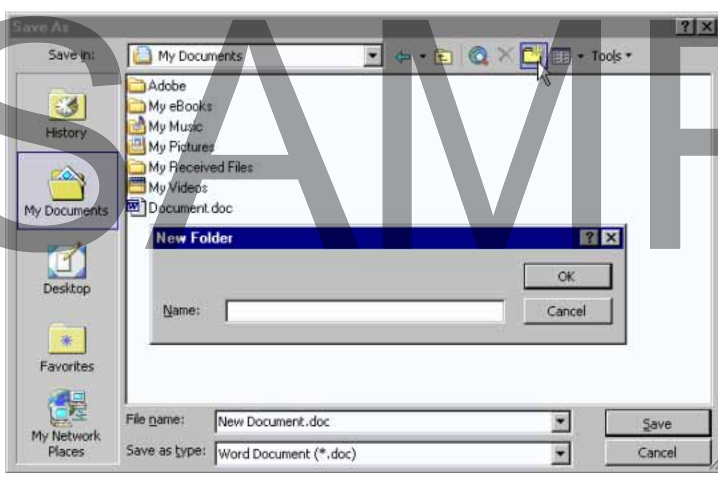
To save a document under another name and/or location

- The **Save As** command can be used to save a file under a different name, to save a file in a different word processor format, or to save a file to a different drive and/or folder. From the main menu, choose **File > Save As** command.

  Note: The **File > Save As** command will rename the document on the screen so that you can keep the earlier version, as well as saving any changes you have made.

To create a new folder in which to save your document

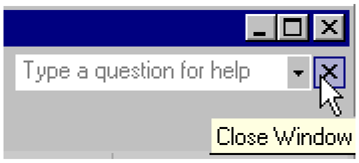
- Click on the **Create New Folder** icon, displayed within the **Save As** dialog box.
- This will display the **New Folder** dialog box. Enter the name of the new folder, and then click on the **OK** button:



Note: The folder will be created under the current folder.

Closing Files

- Click on the **Close Window** icon displayed at the top-right of the document window. Be sure to click on the **Close Window** icon, (as opposed to the **Close** icon):



Installing the Sample Files

- Use Windows Explorer to create a folder called **Project 2003 Foundation Samples**, in the **My Documents** folder.
- If you are installing the sample files from the CD-ROM, place the CD-ROM in the CD drive and copy the files from the **project_2003_foundation_usa\exercise_files** to the **My Documents\Project 2003 Foundation Samples** folder.
- If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.

- **Notes for tutors:**
The above instructions are for Windows that has not been set-up for a multi-user environment (with individual profiles). The instructions above may require modification within a Windows mutliuser environment. Where possible pre-install the relevant work files prior to use by students/delegates.

Introduction to Microsoft Project 2003

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

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

What is Project 2003?

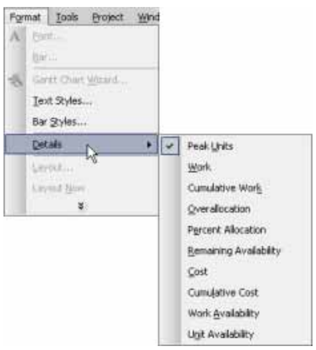
Project 2003

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

The Project 2003 Environment

Using the Main Menu

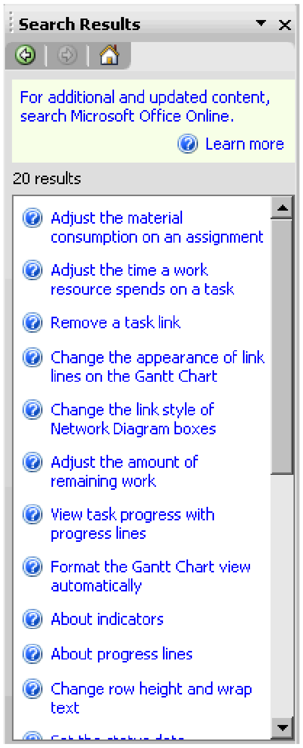
- The **Main Menu** (or **Menu Bar**) contains all of the Project 2003 menu options. From these menu options, you can access most of Project 2003's features. It consists of drop-down menus and submenus that allow you to select the command you want to execute:



Using the Ask a Question Box

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

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

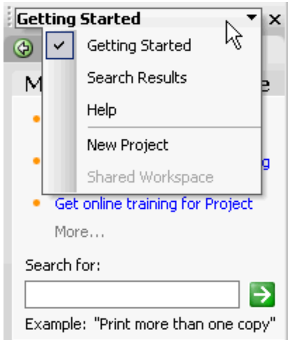


- You can click on the links to read about the topic.
- If you have internet access, Project will also search on Microsoft Office Online for related help topics.

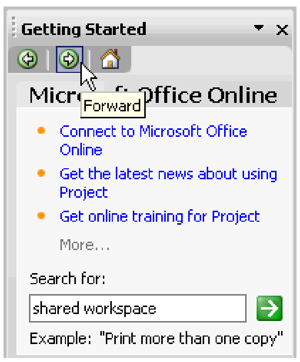
Using Task Panes

- The **Task Pane** is a like a dialog box 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.
- This area of Project has been much improved over previous versions. Earlier versions only contained the New Project and Search task panes
- Project 2003 provides four task panes: **Getting Started, Search Results, Help** and **New Project.**

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



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



To show or hide the Task Pane

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

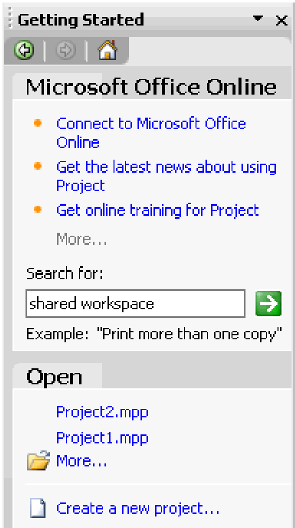
  OR from the main menu, choose **View > Toolbars** and select **Task Pane** from the drop-down menu.

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

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

Using the Getting Started Pane

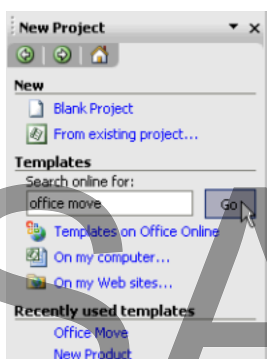
- The **Getting Started** pane is a new feature in Project 2003. It is similar to task panes found in other Microsoft Office programs and contains links to Microsoft Office Online, a link to open recently used projects, and a link to create a new project:



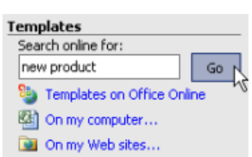
- Clicking on one of the listed projects will open the project.
- Clicking on the **More** link, will display the **Open** dialog box.
- Clicking on the **Create a new project** link, will display the **New Project** pane.

Using the New Project Pane

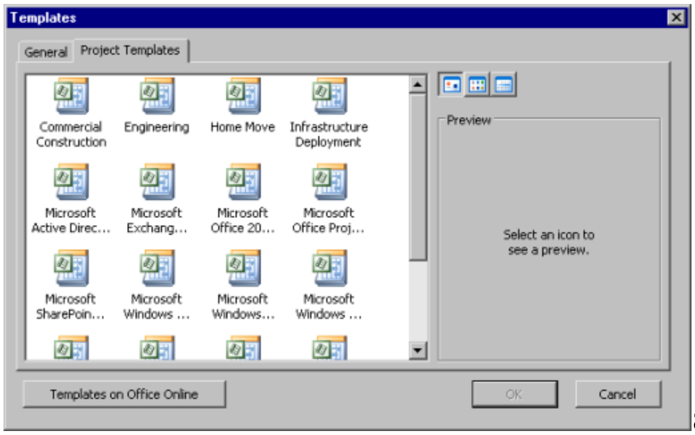
- The **New Project** pane allows you to create a new project from scratch, from an existing project, or from a template:



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



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



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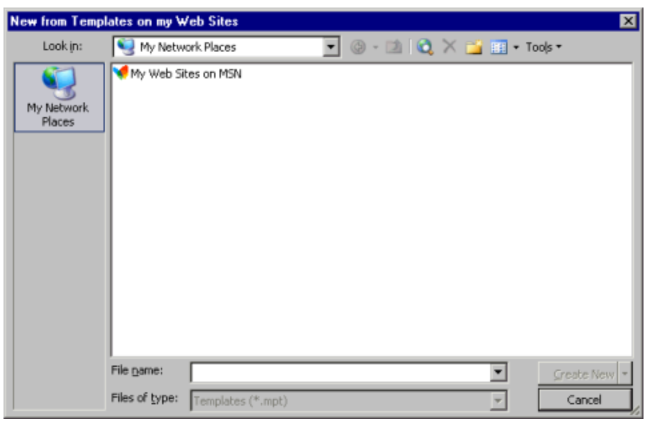
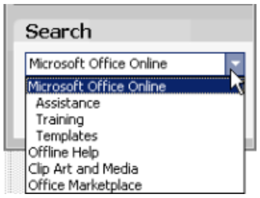
- Click **On my Web sites** to open the **New from Templates on my Web Sites** dialog box and browse to find the desired template:



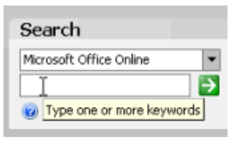
- The New Project pane also lists **Recently used templates** for you to select from.

Using the Search Results Pane

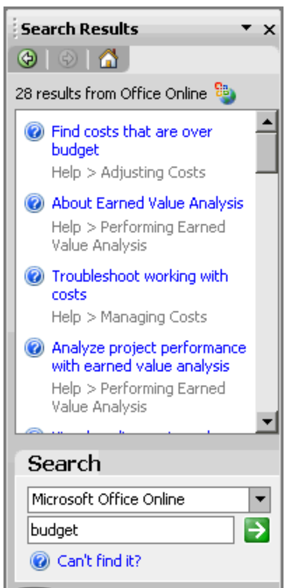
- The **Search Results** pane has two areas. The upper portion is for displaying the results of a search, and the lower portion is for entering search criteria.
- In the **Search** area, you can use the drop-down menu to choose where you would like Project to look for the information:



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



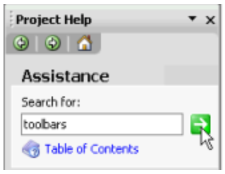
- Project displays the search results in the upper portion of the task pane:



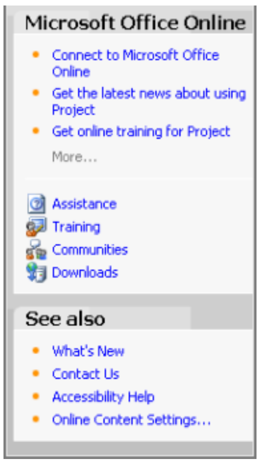
- Simply click on the link to display the Microsoft Office Help window.

Using the Project Help Pane

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



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

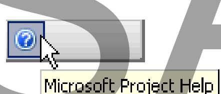


Using Microsoft Project Help

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

To access Microsoft Project Help:

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



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

OR press the **F1** key.

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

Accessing the Office Assistant

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

To show the Office Assistant

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

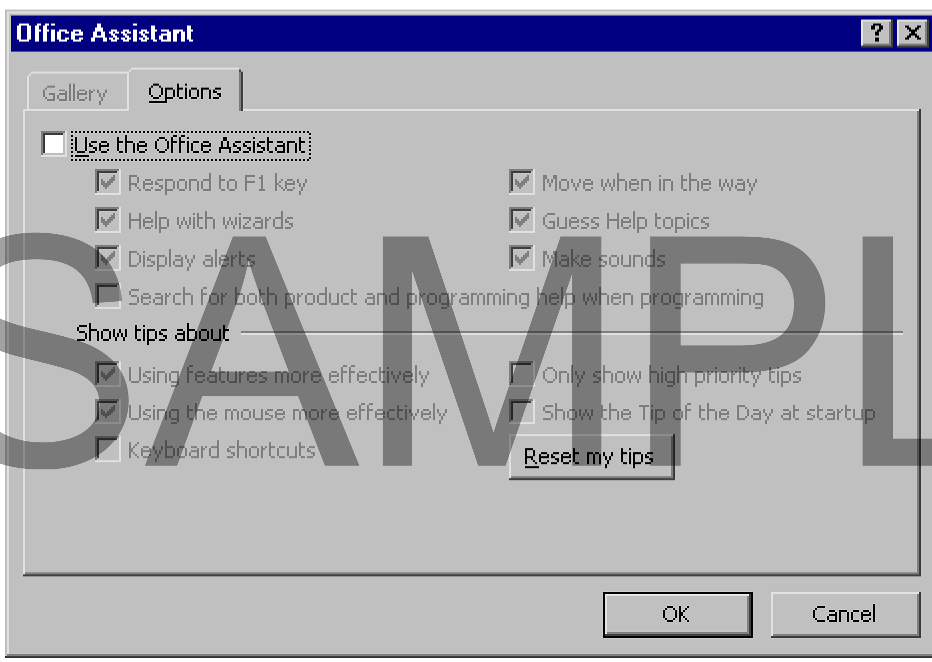
To hide the Office Assistant

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

  OR right-click on the Office Assistant and select **Hide**.

To turn the Office Assistant off

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



Toolbars

Showing a Toolbar

- The **Standard** and **Formatting** toolbars are shown by default. The other toolbars are used only for specific functions in Project. From the main menu, choose **View > Toolbars** and select the toolbar you would like to show

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

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

Hiding a Toolbar

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

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

Moving a Toolbar

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

Using the Standard Toolbar

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

   **New** - creates new project.

   **Open** - opens an existing project.

   **Save** - saves the current project.

Search - performs a search.

Print - prints the project.

Print Preview - changes display to print preview.

Spelling - performs a spell check.

Cut - cuts the selected range to the Office clipboard.

Copy - copies the selected range to the Office clipboard.

Paste - pastes the last item from the Office clipboard.

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

Undo - undoes the last action.

Hyperlink - inserts a hyperlink.

Link Tasks - links selected tasks.

Unlink Tasks - unlinks selected tasks.

Split Task - splits selected tasks.

Task Information - displays the Task Information dialog box.

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

Assign Resources - opens the Assign Resource dialog box.

Publish All Information - publishes to the Microsoft Project Server.

No Group **Group by** - groups tasks according to your selection.

Zoom In - increases the zoom.

Zoom Out - decreases the zoom.

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

Copy Picture - opens the Copy Picture dialog box.

Microsoft Project Help - opens the Project Help Pane.

Using the Formatting Toolbar

- The **Formatting** toolbar provides quick access to commonly used formatting actions. Each icon represents a particular action. When you point to an icon with your cursor (without clicking), a descriptive tool tip appears to help you identify it.

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

Arial **Font** - selects fonts from a drop-down menu.

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

Bold - changes the selected text to bold.

Italic - changes the selected text to italic.

Underline - underlines the selected text.

Align Left - aligns the selected text to the left.

Center - aligns the selected text to center.

Align Right - aligns the selected text to the right.

All Tasks **Filter** - allows you to filter tasks.

AutoFilter - allows you to filter information easily.

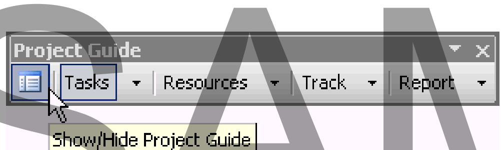
Gantt Chart Wizard - starts the Gantt Chart Wizard.

Using the Project Guide

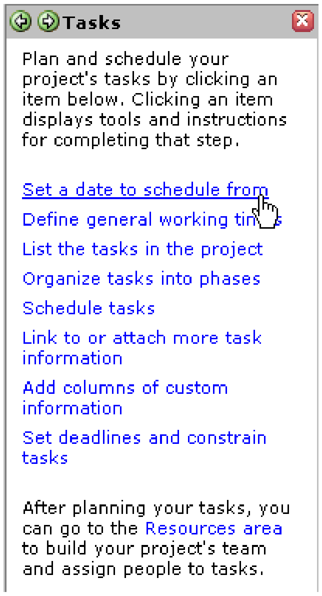
- The **Project Guide** is a new "goal-based user interface" that can help you start your project. It is similar to the task pane and provides guides and wizards in four main categories: **Tasks**, **Resources**, **Track** and **Report**.

To Show the Project Guide:

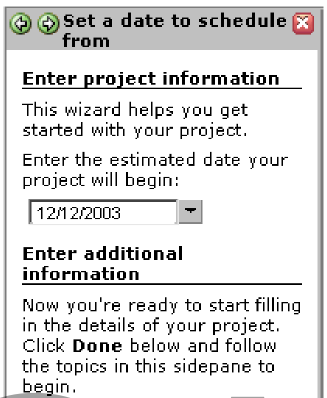
- To view the Project Guide, from the main menu, select **Tools** > **Options**. Click on the **Interface** tab and check off **Display Project Guide**.
- Then from the main menu, select **View** > **Toolbars** > **Project Guide**. The Project Guide toolbar will be displayed.
- Click on the **Show/Hide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



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

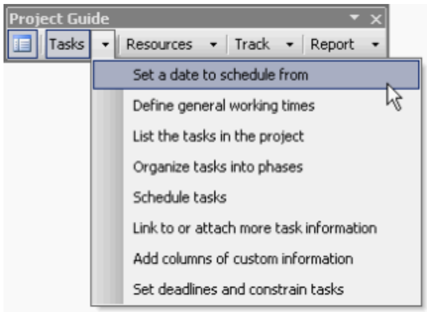


- Click on the blue links to go to a particular subject where Project will guide you through each step:

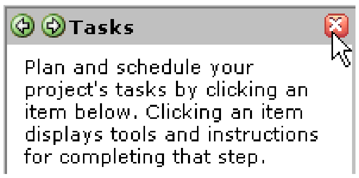


- You can easily navigate from one topic to the next using the **Project Guide** toolbar:

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



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



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

Review Questions

How would you:

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

Defining the Project

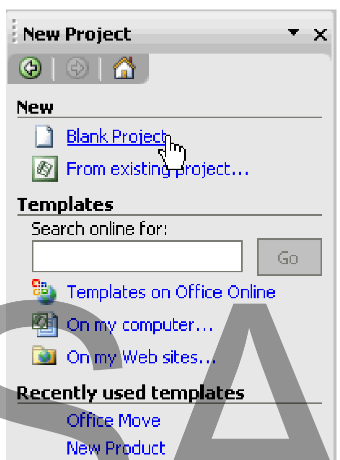
When you have completed this learning module you will have seen how to:

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

Creating a New Project

Starting a New Project

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



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

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

Opening a Project

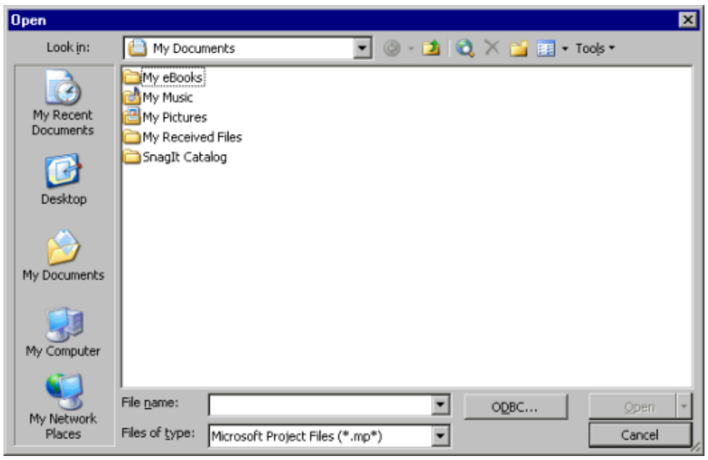
Opening a Project

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

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

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

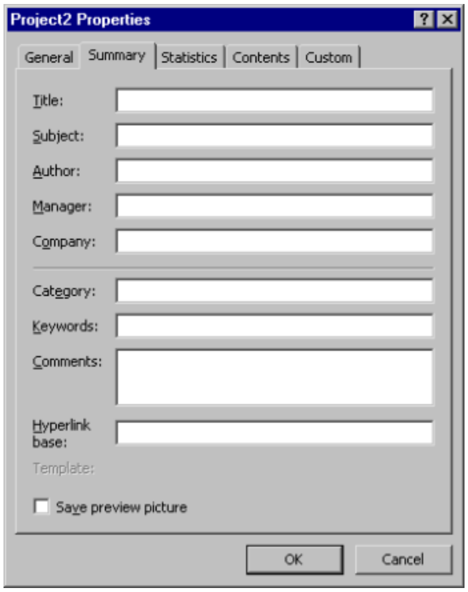
- This will display the **Open** dialog box. Browse to find the project you wish to open. Open either by **clicking on** the file and then clicking **Open**, or by **double-clicking** it:



Using File Properties

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.
- The **General** tab provides a quick summary of the name, type, location, size, creation date, modified date, accessed date and attributes of the project.
- In the **Summary** tab, you can enter any additional information you may want to record regarding your project:



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

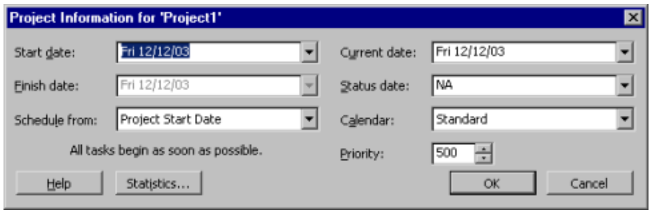
Entering Start and Finish Dates

Inputting Start and Finish Dates

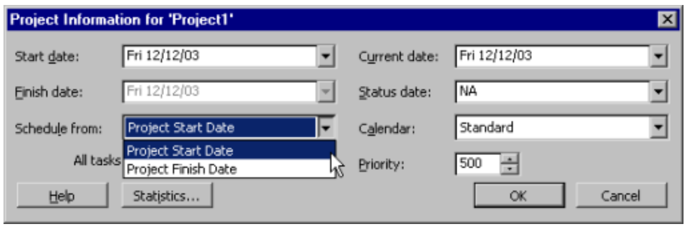
- The first step in starting a new project is establishing basic project information. The start ***or*** finish date is what you will use to anchor your project. Your schedule will be built around either the start date or the finish date that you choose.
- The start and finish date information is entered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

To Enter Project Information

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

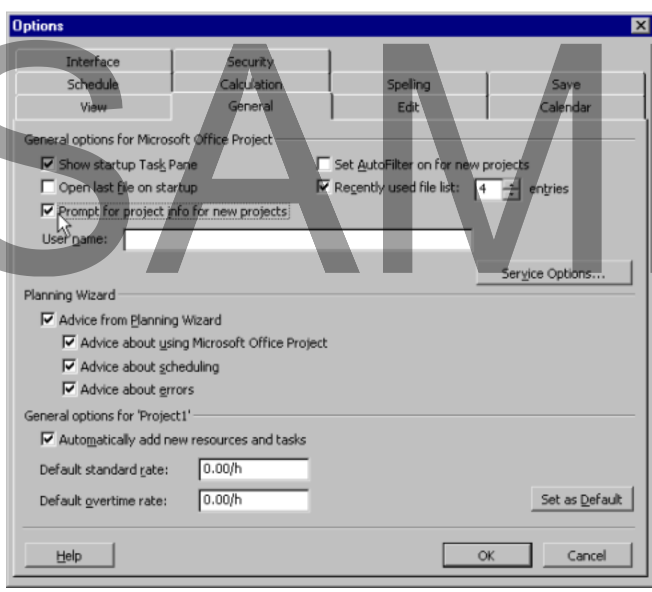


- Depending on what you choose from the **Schedule from** drop-down menu (**Project Start Date** is the default), either the start date or finish date will be available for you to select:



- 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**:



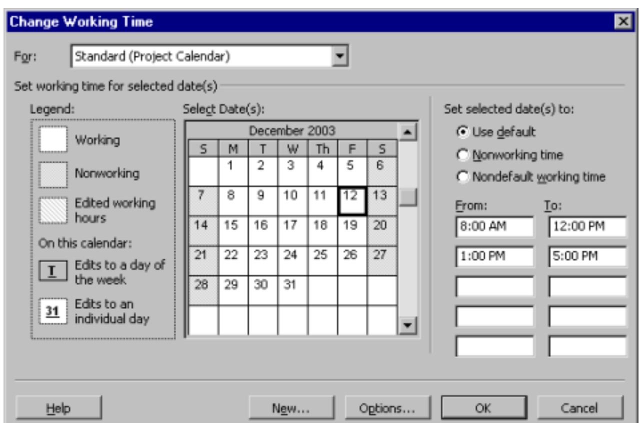
Establishing a Project Calendar

Setting up a Project Calendar

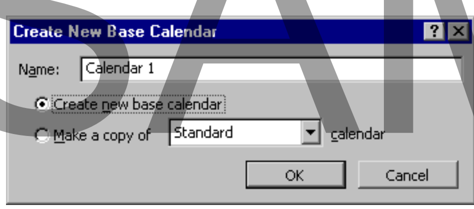
- Project supplies three basic calendars (**Standard**, **Night Shift** and **24 Hours**) that you can use as foundations to create your own base calendar. You can make a calendar that indicates general working times for each resource or group of resources. Project will use this information for things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



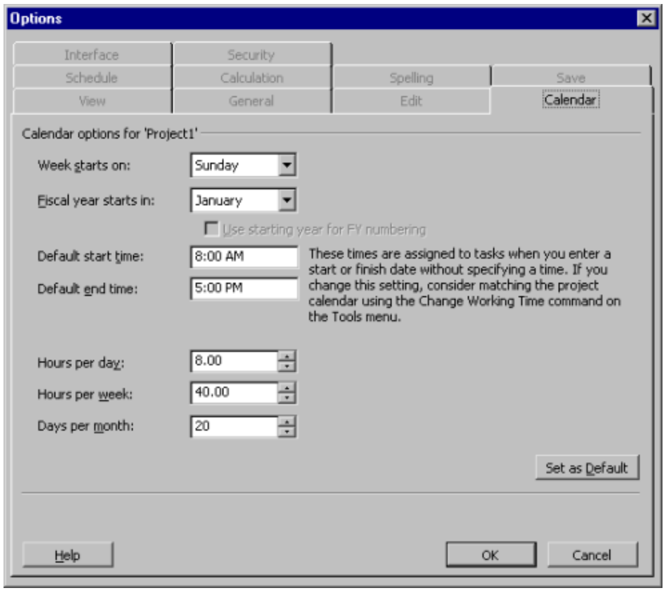
- Click on **New**. The **Create New Base Calendar** dialog box will open:



- 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:



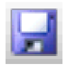
To change a Calendar

- 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 Date(s)** portion of the dialog box to select a specific date or range of dates.
- Use the **Set Selected Date(s) to** portion of the dialog box to make the necessary changes.

Saving

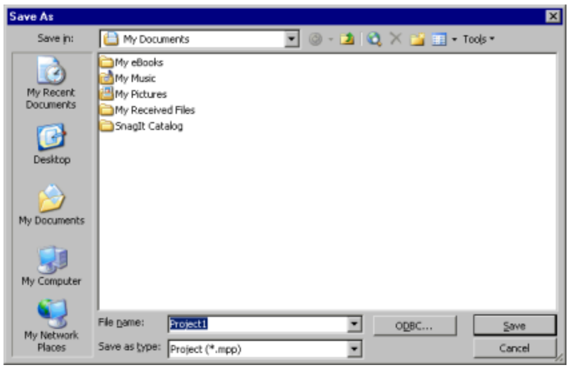
Saving Your Project

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

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

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

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



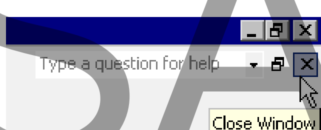
- **Browse** to find the location where you would like to save your project, enter a name in the **File name** text box, and click **Save**.

Quitting and Closing

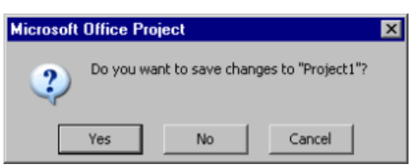
Closing a Project

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

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



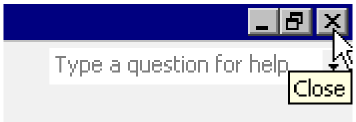
- If you have not saved your project yet, you will be prompted to do so:



Quitting Project 2003

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

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



Review Questions

How would you:

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

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

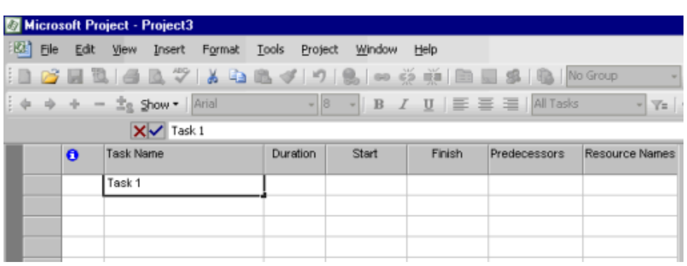
Entering Tasks

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

Entering Tasks

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

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



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

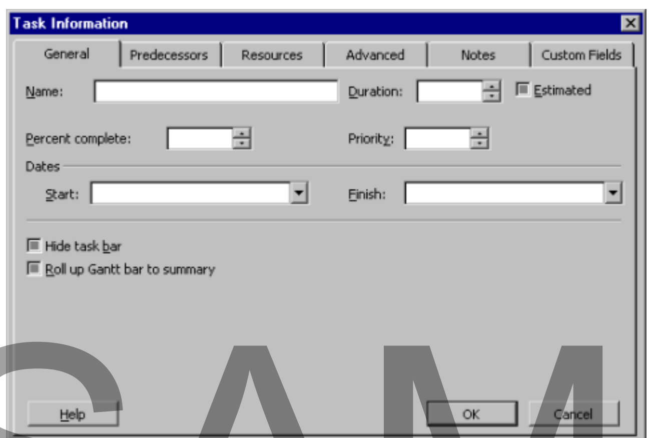
- After you accept the information, the task is assigned an **ID number** that is displayed in the far left column.

- 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

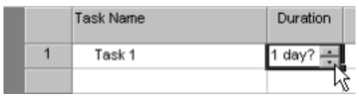
Entering Task Durations

- 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.
- Project uses abbreviations for different time measures. Use these abbreviations when typing in the duration:

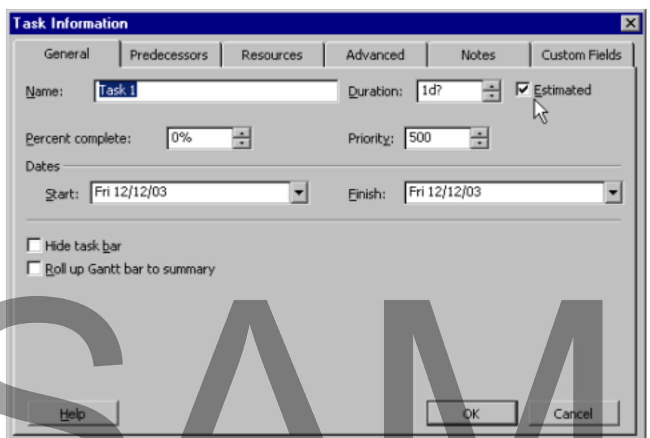
m Minutes
h Hours
d Days
ed Elapsed days
w Weeks
mo Months

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

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



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



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

Entering Subtasks

Entering Subtasks

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

To enter a subtask

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

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

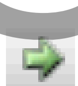
- To create a new row, from the main menu, choose **Insert > New Task**

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

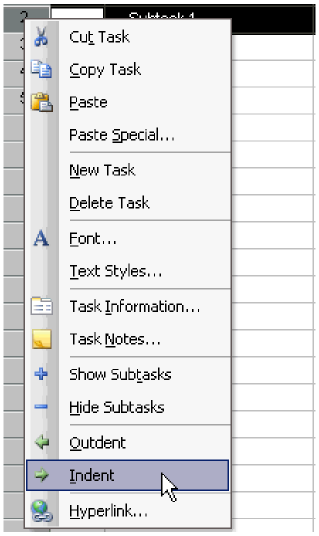
- This will create a new task row:

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

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



OR right-click on the new task's ID number at the far left and select **Indent** from the drop-down menu:



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

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

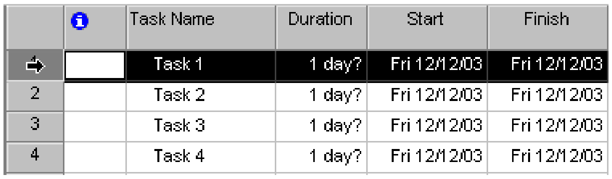
- It is also possible to break a task down even further and create a subtask for a subtask:

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

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

Creating a Summary Task

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

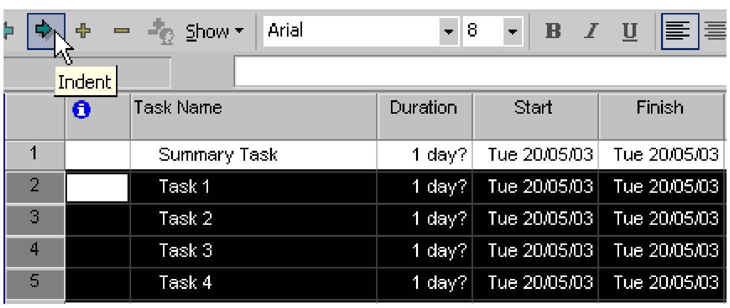


- To create a new row, from the main menu, choose **Insert > New Task**

  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:



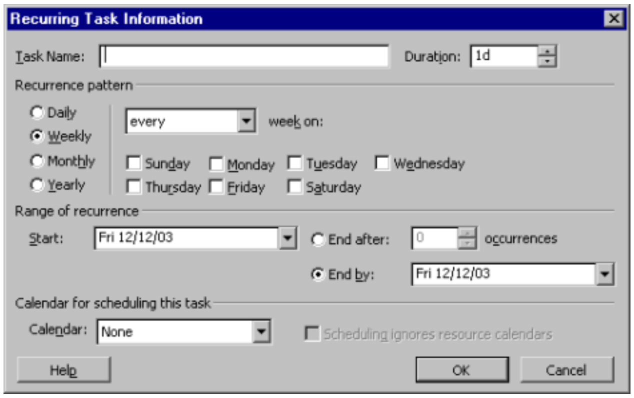
Using Recurring Tasks

Entering Recurring Tasks

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

To create a Recurring Task

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



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

		Task Name	Duration	Start	Finish
1		**Summary Tas**	**47 days?**	**Fri 12/12/03**	**Mon 2/16/04**
2		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
3		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
5		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03
6		**Recurring**	**46 days**	**Mon 12/15/03**	**Mon 2/16/04**

Using Task Notes

Entering Task Notes

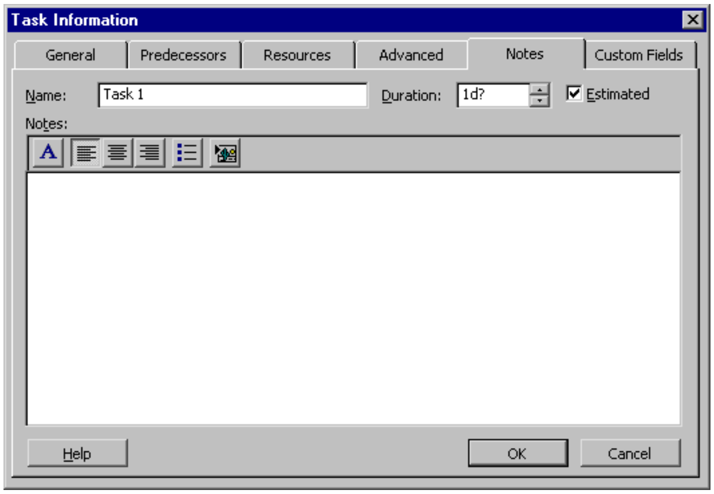
- Notes can be attached to a task to quickly display information regarding anything related to it. Notes can be displayed onscreen and included in printed reports.

To enter a Task Note

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

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

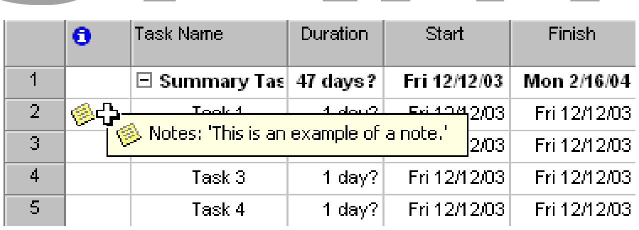
  OR double-click on the task and select the **Notes** tab in the **Task Information** dialog box:



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

	i	Task Name	Duration	Start	Finish
1		**⊟ Summary Tas**	**47 days?**	**Fri 12/12/03**	**Mon 2/16/04**
2		Task 1	1 day?	Fri 12/12/03	Fri 12/12/03
3		Task 2	1 day?	Fri 12/12/03	Fri 12/12/03
4		Task 3	1 day?	Fri 12/12/03	Fri 12/12/03
5		Task 4	1 day?	Fri 12/12/03	Fri 12/12/03

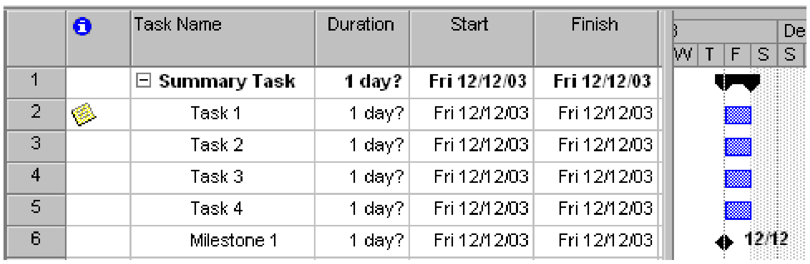
- Hover your mouse pointer over the note symbol to read the note:



Assigning Milestones

Assigning Milestones

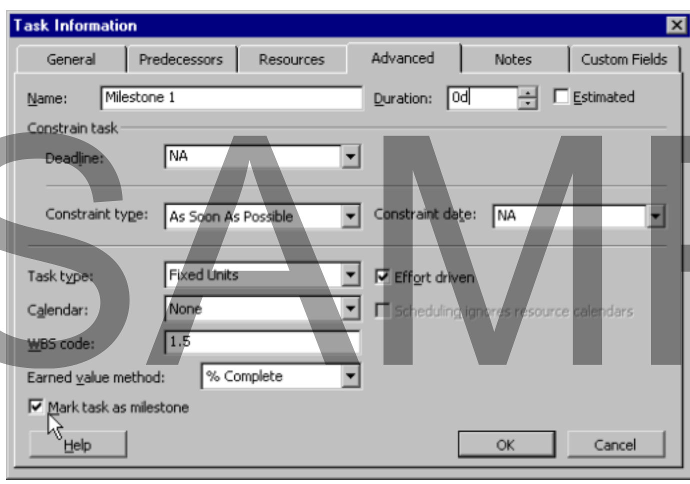
- Milestones are used to mark key moments in a project and can help you monitor your progress. Although a milestone is usually a task with no duration, it is possible to make a task that has a duration as a milestone.
- Milestones are marked by a diamond in the Gantt Chart view:



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



- Click **OK**.

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.

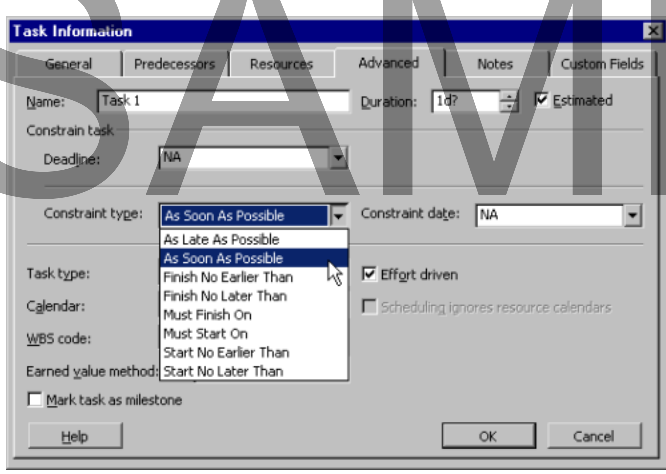
Finish No Earlier Than /
Finish No Later Than
Schedules the tasks to finish no later or sooner than a specific date.

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:



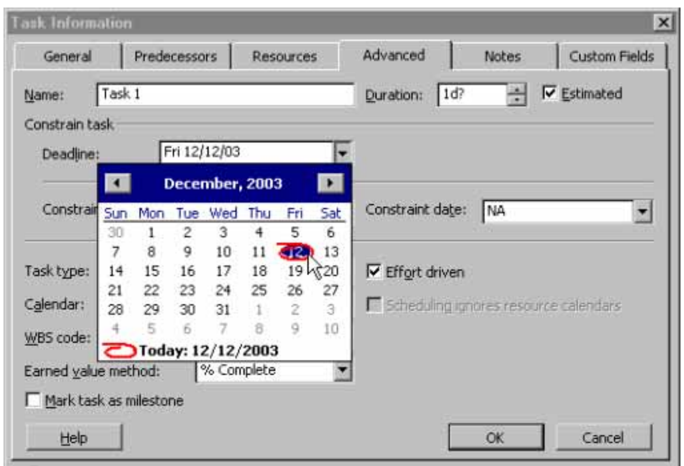
- Choose the desired constraint from the **Constraint type** drop-down menu and enter a constraint date if applicable.

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.

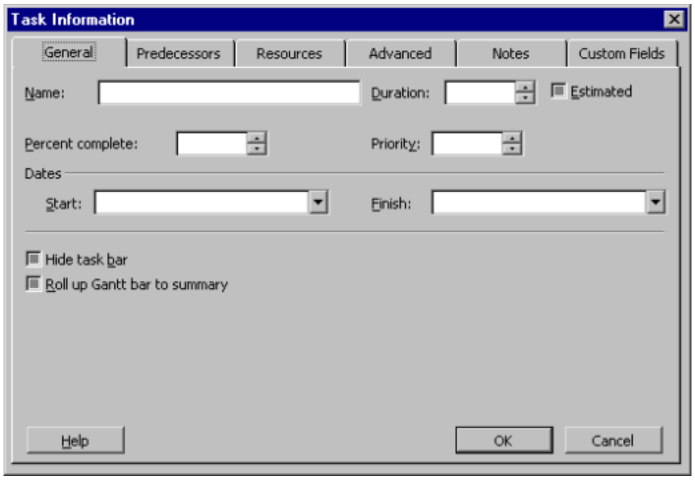
To Create a Deadline

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



Editing Tasks

- 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

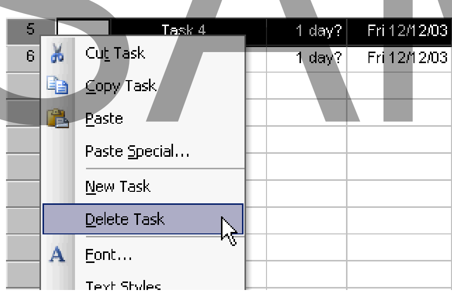
- Occasionally you will need to delete tasks either because they were entered in error or they are no longer relevant. There are several ways to do this.

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

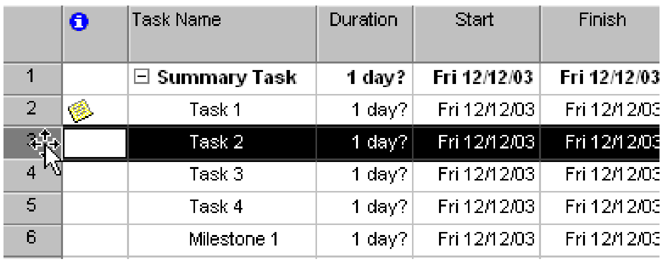
OR right-click on the highlighted task(s) and select **Delete Task**:



Moving Tasks

Moving Tasks

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



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

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

  OR cut and paste the task to the desired location.

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

Creating Dependencies

Establishing Dependencies

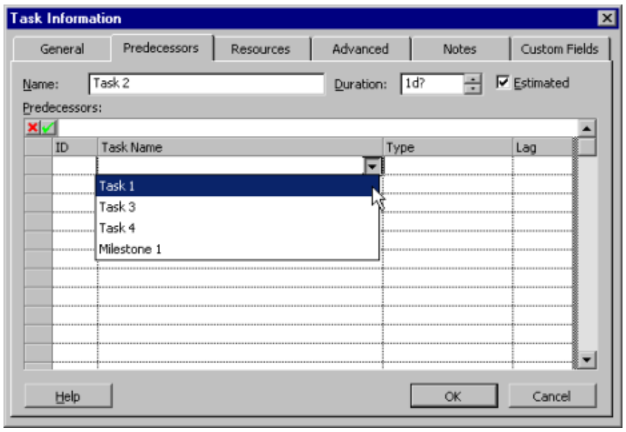
- Dependencies are a way to link tasks together in order to describe which tasks must precede or succeed one another - some tasks must start or finish before another task can begin or end. Creating dependencies allows Project to create a flexible time framework relative to the task preceding or succeeding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

Using Finish-to-Start (FS) Dependencies

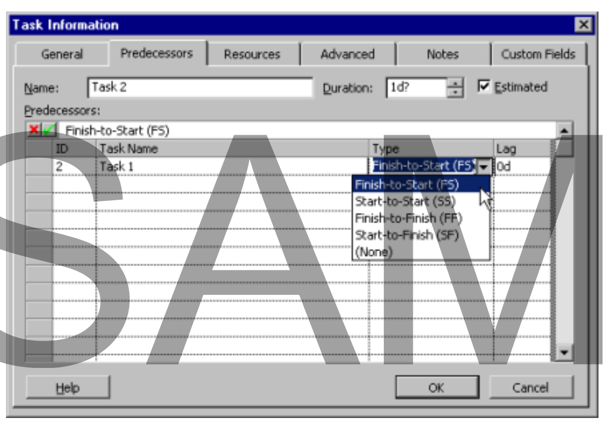
- The **finish-to-start** dependency is the most common type of relationship. The start of one task begins as soon as its predecessor finishes. The successor can't start until the predecessor finishes.

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:

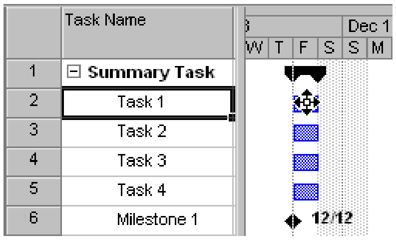


- Choose the type of dependency from the drop-down menu of the **Type** column:

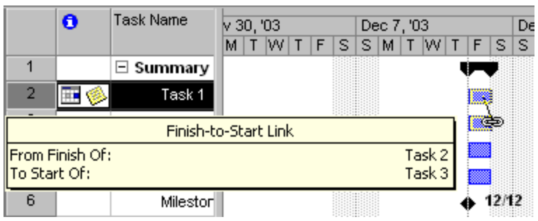


- Click **OK**

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.

End of the preview sample

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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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