

Microsoft Project XP

Workbook - Foundation Level



SAMPLE

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Installing the Sample Files into the Hard Disk

Installing the sample files

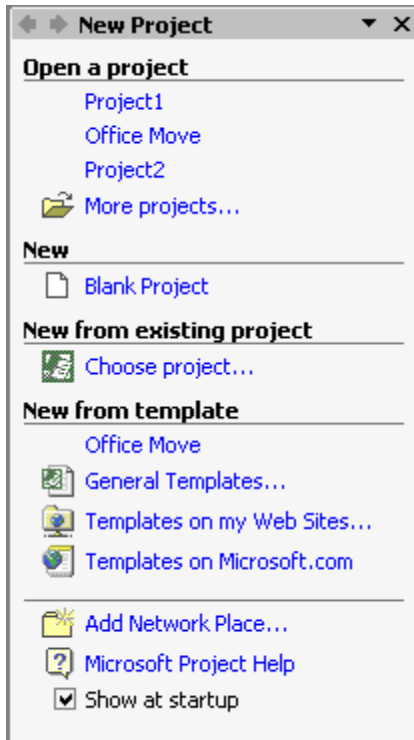
- Use Windows Explorer to create a folder called **Project XP Foundation Samples**, in the **My Documents** folder.
- Copy the sample files for this course to the **My Documents\Project XP Foundation Samples** folder. If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.

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Introduction to Microsoft Project XP

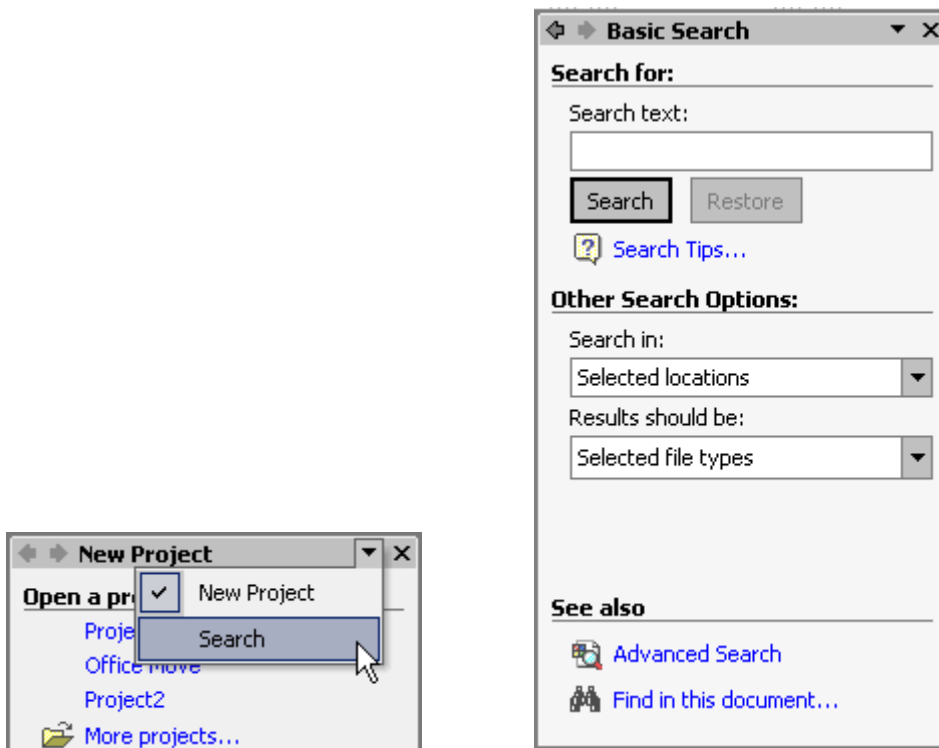
Using the Task Pane

- Open Project 2002.
- If the **New Project task pane** does not open automatically, from the main menu, choose **View > Toolbars > Task Pane**:



- **Click** on the **down arrow** on the top right-hand side of the task pane. Select **Search** to open the **Basic Search** pane:

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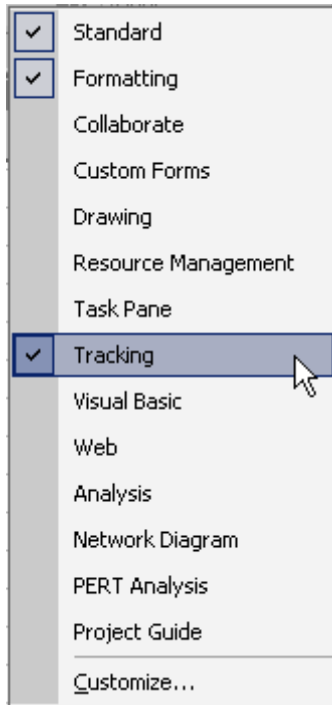


Showing and Hiding Toolbars

- From the main menu, choose **View > Toolbars > Tracking** to show the **Tracking** toolbar

OR right-click on any toolbar and select **Tracking**:

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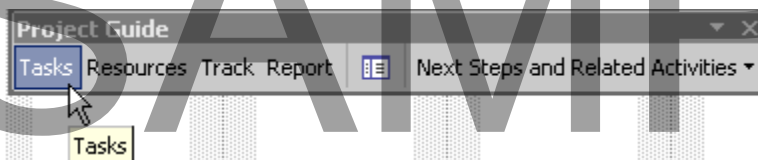
Note: A check mark appears beside a toolbar if it is shown.

- To hide the **Tracking** toolbar, from the main menu, choose **View > Toolbars > Tracking** to deselect the **Tracking** toolbar

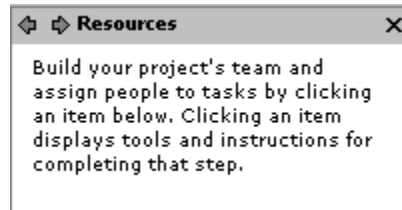
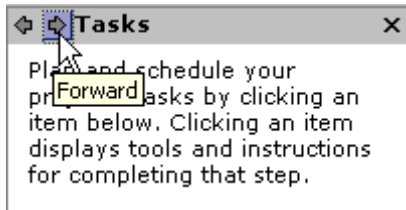
OR right-click on any toolbar and deselect **Tracking** from the listed toolbars.

Using the Project Guide

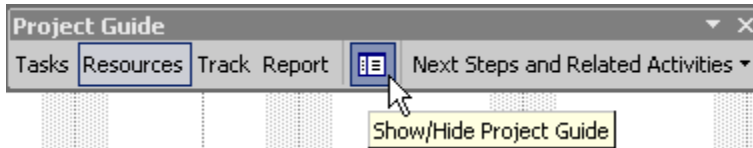
- Display the **Project Guide** by selecting **View > Toolbars > Project Guide** from the main menu.
- In the **Project Guide** toolbar, click on **Tasks** to display the **Tasks** pane:



- Use the **forward** arrow at the top left of the **Tasks** pane to display the **Resources** pane:



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

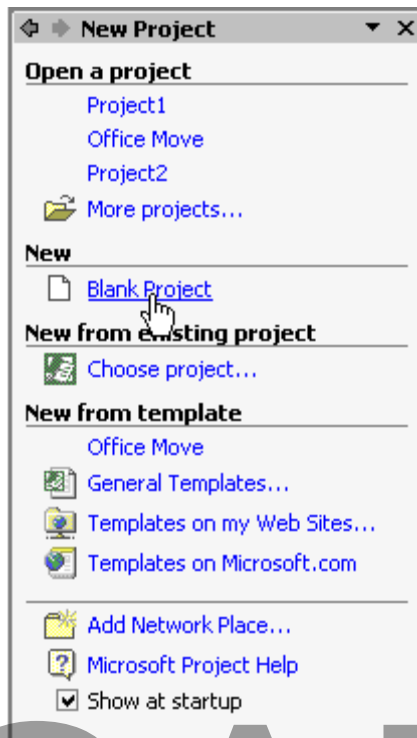


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Defining the Project

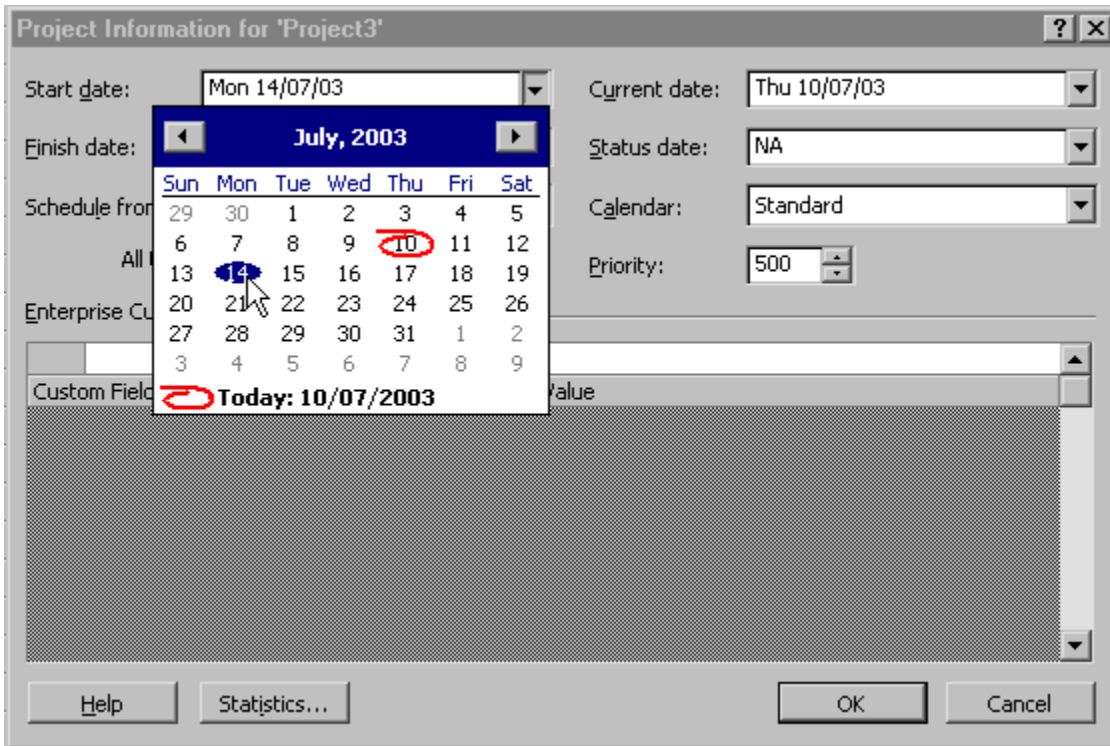
Opening a New Project

- Use Windows Explorer to create a folder called **Project 2002 Foundation Work Folder** in the **My Documents** folder.
- Start Project 2002.
- From the main menu, choose **File > New**.
- Click on **Blank Project** in the **New Project** task pane:

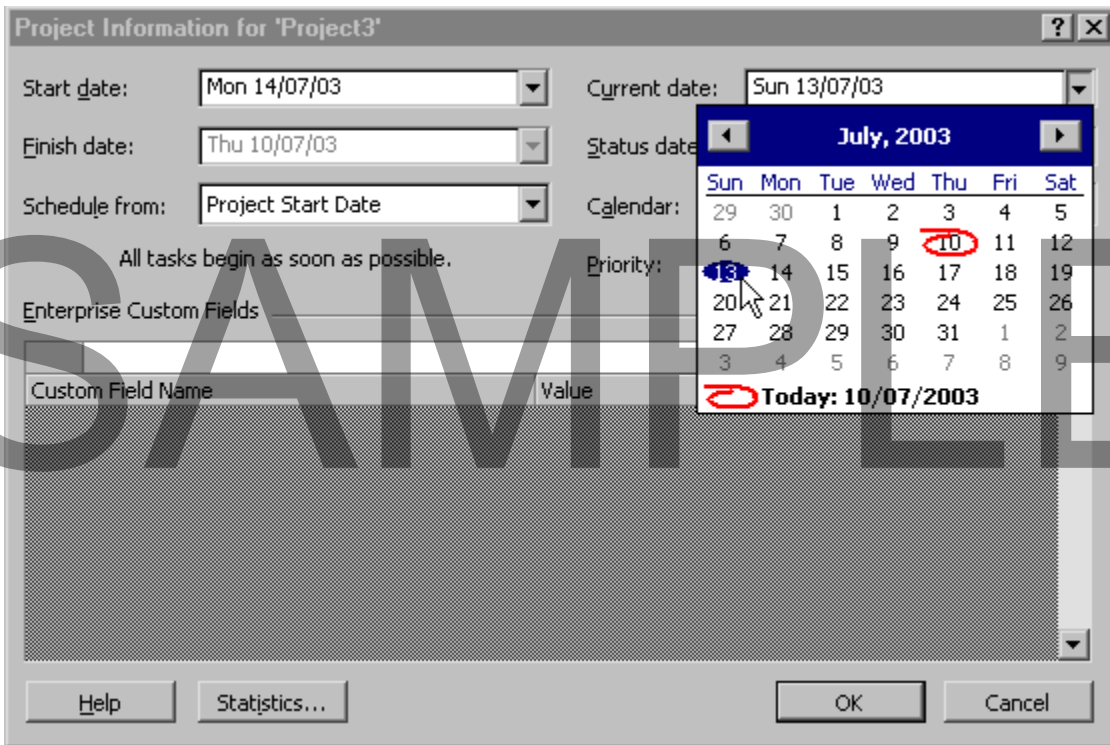


Entering Start and Finish Dates

- The **Project Information** dialog box opens automatically when you select **Blank Project** from the **New Project** task pane.
- If the **Project Information** dialog box does not open automatically, from the main menu, choose **Project > Project Information**.
- Use the drop-down calendar in the **Start date** field to select **Monday, July 14, 2003**:



- Use the drop-down calendar in the **Current date** field to change the date to **Sunday, July 13, 2003**:



Establishing a Project Calendar

- Select **Standard** from the **Calendar** drop-down menu in the **Project Information** dialog box:

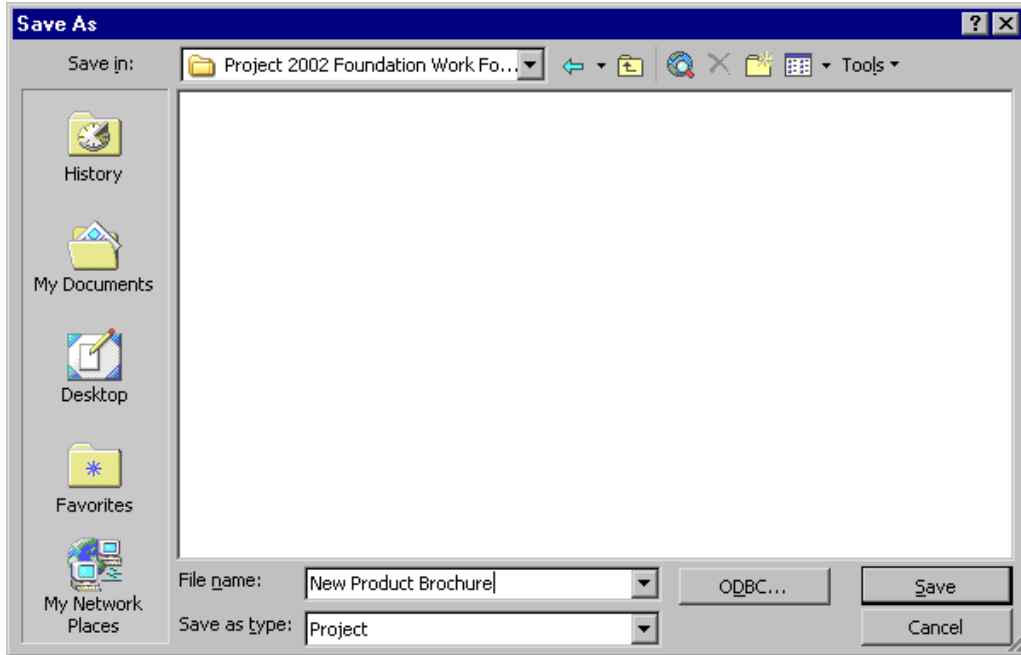
The screenshot shows the 'Project Information for 'Project3'' dialog box. The 'Calendar' dropdown menu is open, displaying 'Standard' as the selected option. Other visible fields include 'Start date' (Mon 14/07/03), 'Current date' (Sun 13/07/03), 'Finish date' (Mon 14/07/03), 'Status date' (NA), 'Schedule from' (Project Start Date), and 'Priority' (Standard). The dialog also features a section for 'Enterprise Custom Fields' with a table header 'Custom Field Name' and 'Value'. At the bottom, there are buttons for 'Help', 'Statistics...', 'OK', and 'Cancel'.

- Click **OK** to close the **Project Information** dialog box and save the project information entered.

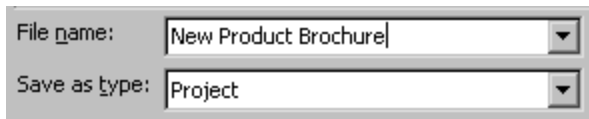
Saving

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

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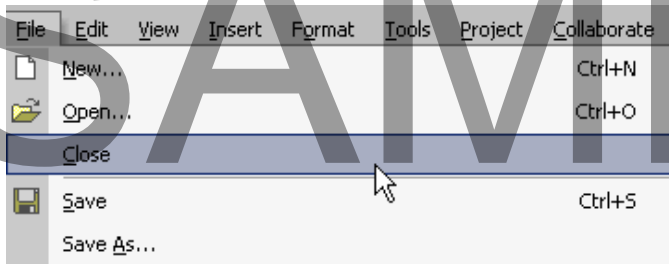
- Double-click on Project 2002 Foundation Work Folder.
- Type ***New Product Brochure*** in the File name field:



- Click **Save**.

Quitting and Closing

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



- From the main menu, choose **File > Exit** to exit Project 2002.

Tasks

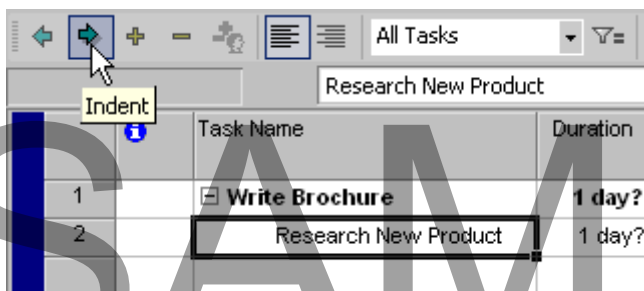
Entering Tasks

- Open New Product Brochure from your Project 2002 Foundation Work Folder in My Documents.
- Click in the **Task Name** column of the **Gantt** table.
- Type **Write Brochure**.
- Press **Enter**.
- Leave the **Duration** and **Start** and **Finish** dates as is:

	i	Task Name	Duration	Start	Finish	Predecessors
1		Write Brochure	1 day?	Mon 14/07/03	Mon 14/07/03	

Entering Subtasks

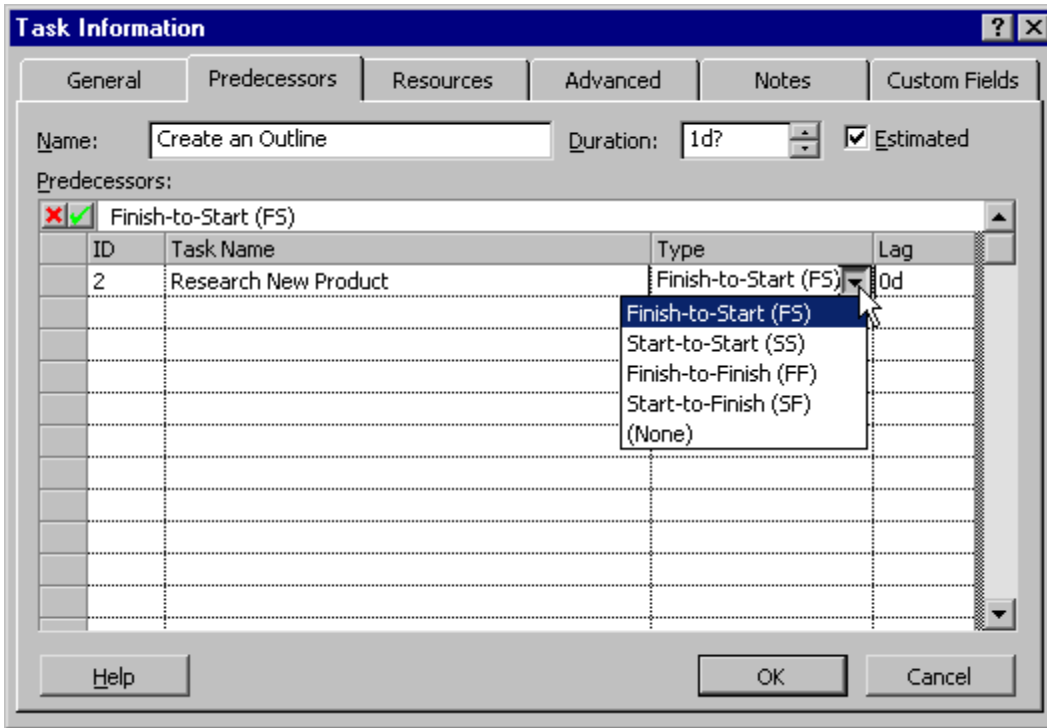
- Click in the **second row** of the Gantt table, underneath "Write Brochure".
- Type **Research New Product**.
- Press **Enter**.
- Highlight "**Research New Product**" by clicking on it.
- Click on the **Indent** icon on the **Formatting** toolbar to make it a subtask:



	i	Task Name	Duration
1		Write Brochure	1 day?
2		Research New Product	1 day?

Creating Dependencies

- Open New Product Brochure - Tasks from the Project XP Foundation Samples folder.
- Double-click on "**Create an Outline**" to open the Task information dialog box.
- Select "Research New Product" from the drop-down list in the **Task Name** column of the **Predecessors** tab:



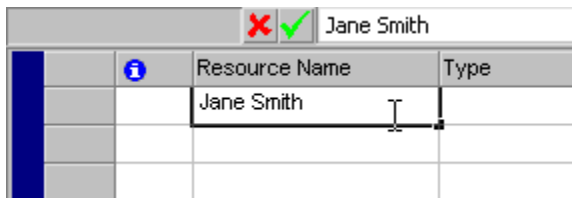
- Select **Finish-to-Start (FS)** in the Type column.
- Click **OK**.
- Notice the **ID number** of the predecessor is shown in the **Predecessors** column of the Gantt table, and the dependency is represented by an **arrow** in the Gantt Chart:

	Task Name	Duration	Start	Finish	Predecessors
1	Write Brochure	2 days?	Mon 14/07/03	Tue 15/07/03	
2	Research New Product	1 day?	Mon 14/07/03	Mon 14/07/03	
3	Create an Outline	1 day?	Tue 15/07/03	Tue 15/07/03	2
4	Write a Rough Draft	1 day?	Mon 14/07/03	Mon 14/07/03	
5	Edit Rough Draft	1 day?	Mon 14/07/03	Mon 14/07/03	
6	Print Brochure	1 day?	Mon 14/07/03	Mon 14/07/03	
7	Prepare through desktop publishing	1 day?	Mon 14/07/03	Mon 14/07/03	
8	Get quotes from printers	1 day?	Mon 14/07/03	Mon 14/07/03	
9	Send to printers	1 day?	Mon 14/07/03	Mon 14/07/03	
10	Distribute Brochure	1 day?	Mon 14/07/03	Mon 14/07/03	
11	Create mailing list	1 day?	Mon 14/07/03	Mon 14/07/03	
12	Do mass mail out	1 day?	Mon 14/07/03	Mon 14/07/03	

Resources


Creating a Resource List

- Open New Product Brochure - Resources from the Project XP Foundation Samples folder.
- From the main menu, choose **View > Resource Sheet**.
- Click in the first row of the **Resource Name** column.
- Type **Jane Smith**:



		Jane Smith	
		Resource Name	Type
		Jane Smith	

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



		Material	
		Resource Name	Type
1		Jane Smith	Work
2		Postage	Material

Entering Working Time

- Open the **Resource Information** dialog box by double clicking on the **Resource Name** Jane Smith in the Resource Sheet view.
- Click on the **Working Time** tab.
- Check to be sure **Standard** is the **Base Calendar** used:

Resource Information

General Working Time Costs Notes Custom Fields

Resource Name: Jane Smith Base calendar: Standard

Set working time for selected date(s)

Legend:

- Working
- Nonworking
- Edited working hours

On this calendar:

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

Select Date(s):

July 2003						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Set:

- Use default
- Nonworking time
- Nondefault working time

From: 8:00 AM To: 12:00 PM

1:00 PM 5:00 PM

Help Details... OK Cancel

- Click **OK**.

Entering Costs

- In the **Resource Sheet** view, highlight "Jane Smith".
- Type **20** in the **Std. Rate** column.
- Press **Enter**.
- Type **30** in the **Ovt. Rate**.
- Press **Enter**.

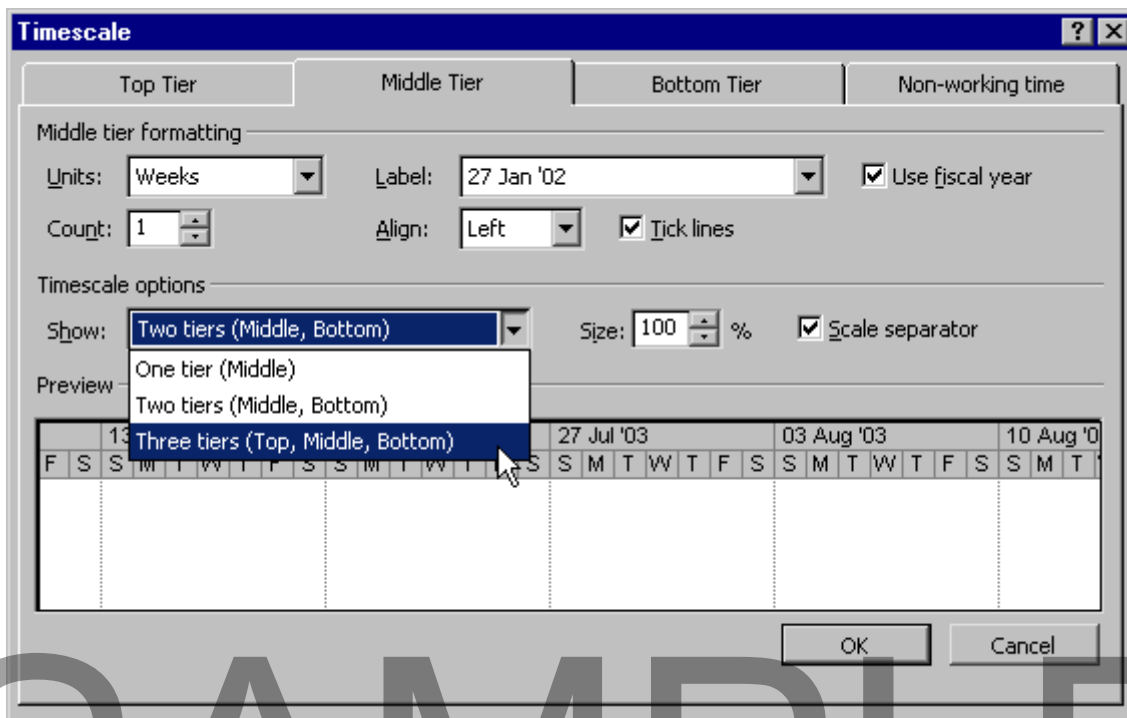
Assigning Resources

- In the **Gantt Chart** view, click on the **Resource Names** field for the **Research New Product** task.
- Select **Jane Smith** from the drop-down list:

Views

Using the Gantt Chart View

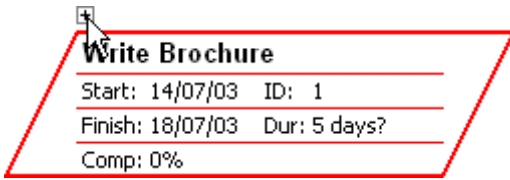
- Open New Product Brochure - Views from the Project XP Foundation Samples folder.
- From the main menu, choose **View > Gantt Chart**.
- Double click on the **timescale** at the top of the Gantt chart to open the **Timescale** dialog box.
- In the **Middle Tier** tab, select **Three tiers (Top, Middle,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



- Click **OK**.

Using the Network Diagram View

- From the main menu, choose **View > Network Diagram**.
- **Show** or **Hide** details by clicking on the cross on the upper left corner of the Summary task nodes:



Using the Task Usage View

- From the main menu, choose **View > Task Usage**.
- Right-click on **Work** in the **Details** column of the **Task Usage chart**, and select **Cost**:

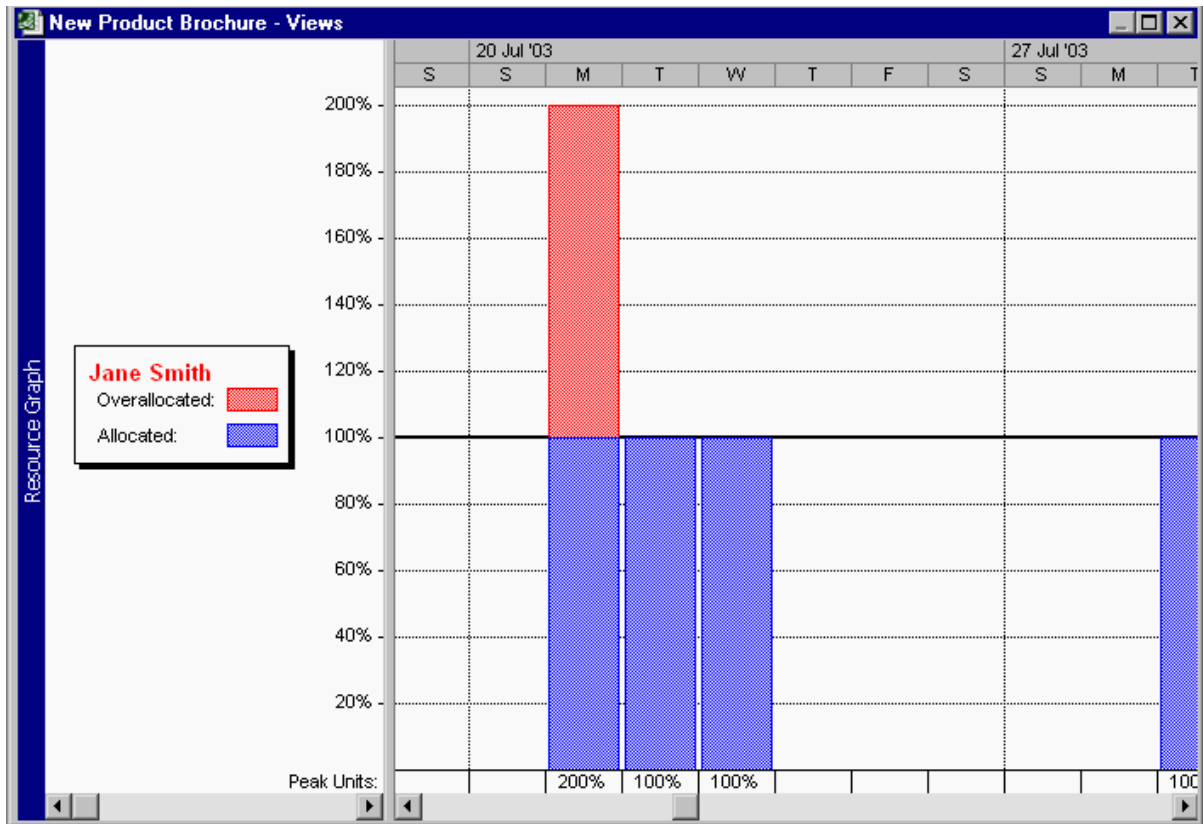
	i	Task Name	Work	Details	M T W		
1		Write Brochure	0 hrs	Work			
6		Print Brochure	0 hrs	Work			
7		Prepare through desk	0 hrs	Work			
8		Get quotes from print	0 hrs	Work			
9		Send to printers	0 hrs	Work			
10		Distribute Brochure	0 hrs	Work			
11		Create mailing list	0 hrs	Work			
12		Do mass mail out	0 hrs	Work			

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

Using the Resource Graph View

- From the main menu, choose **View > Resource Graph**.
- Notice how a red column represents **overallocations**:

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- Use the **scroll bar** at the bottom of the left pane to view other resources.

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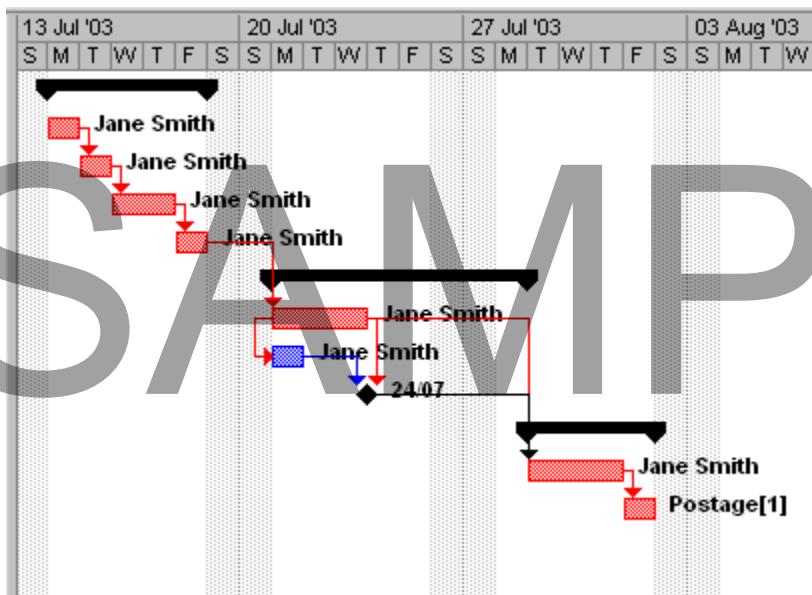
Analyzing & Resolving Scheduling Conflicts

Determining the Critical Path

- Open New Product Brochure - Scheduling Conflicts from the Project XP Foundation Samples folder.
- Click on the **Gantt Chart Wizard** icon on the **Formatting** toolbar:

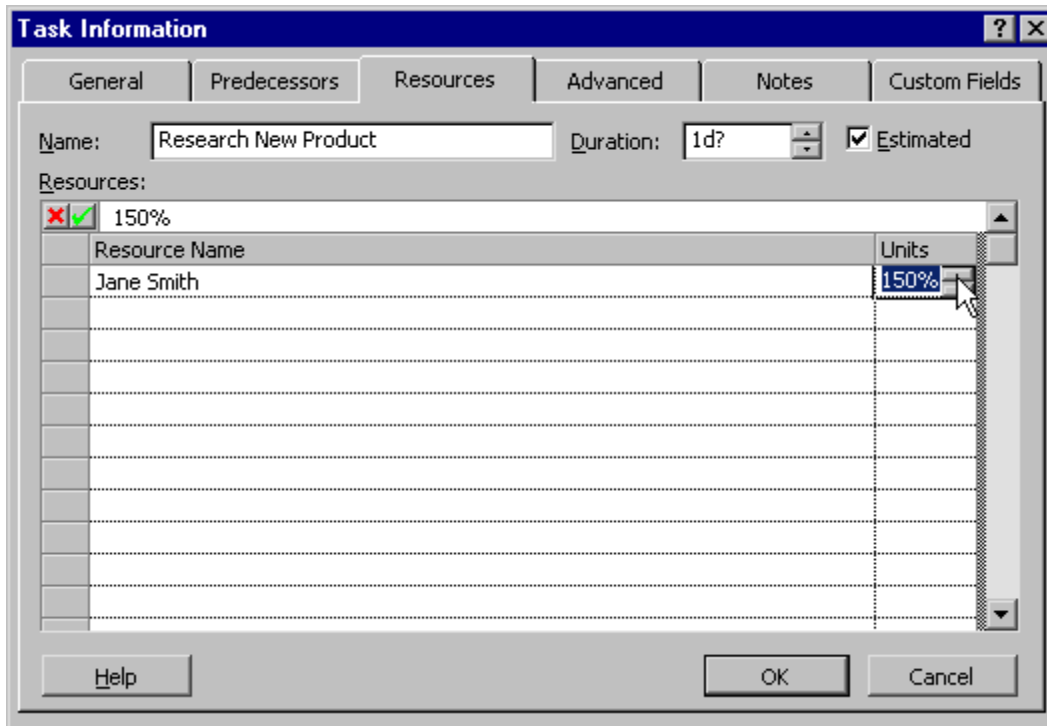


- Click **Next**.
- Select **Critical Path** for the kind of information you want to display.
- Click **Next**.
- Select **Resources and dates** for the task information you want to display.
- Click **Next**.
- Click **Yes** to show link lines.
- Click **Next**.
- Click **Format It**.
- Click Exit Wizard.
- Notice that the critical path is now shown in red:



Assigning Overtime

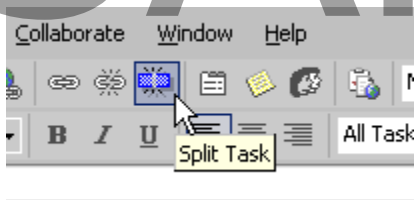
- Double click on "**Research New Product**" to open the **Task Information** dialog box.
- Click on the **Resources** tab.
- Increase the percentage of units in the **Units** column to 150%:



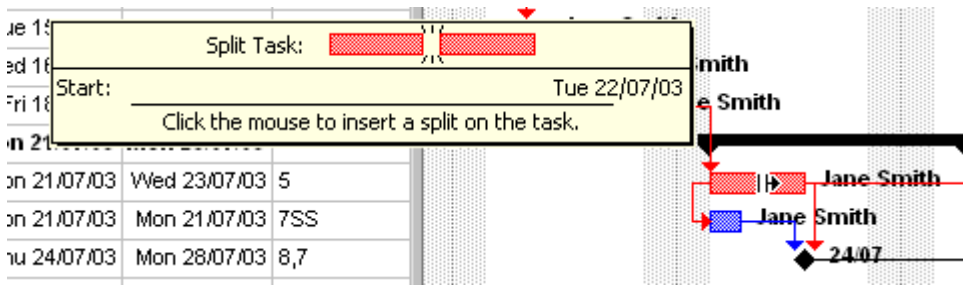
- Click **OK**.

Splitting a Task

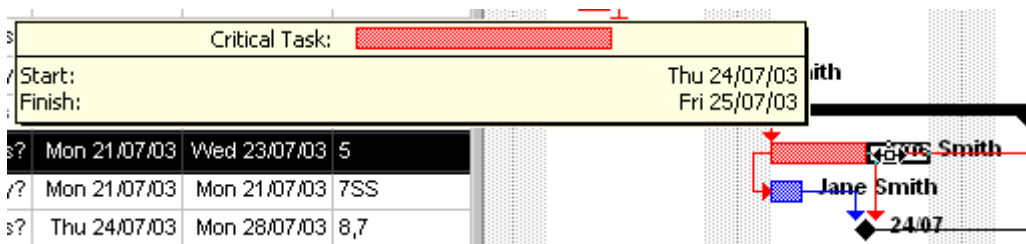
- In the Gantt Chart view, highlight the "Prepare through desktop publishing" tasks.
- Click on **Split Task** icon on the **Standard** toolbar:



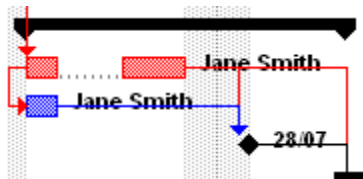
- Hover the cursor over the bar representing the task in the Gantt chart until the date in the information box is **Tue 22/07/03**:



- Click on the bar and drag it to the right until the **Start** date in the information box is **Thu 24/07/03**:



- Let go of the mouse.
- The split is now represented by a **dotted line** between the two segments:



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Analyzing & Resolving Resource Conflicts

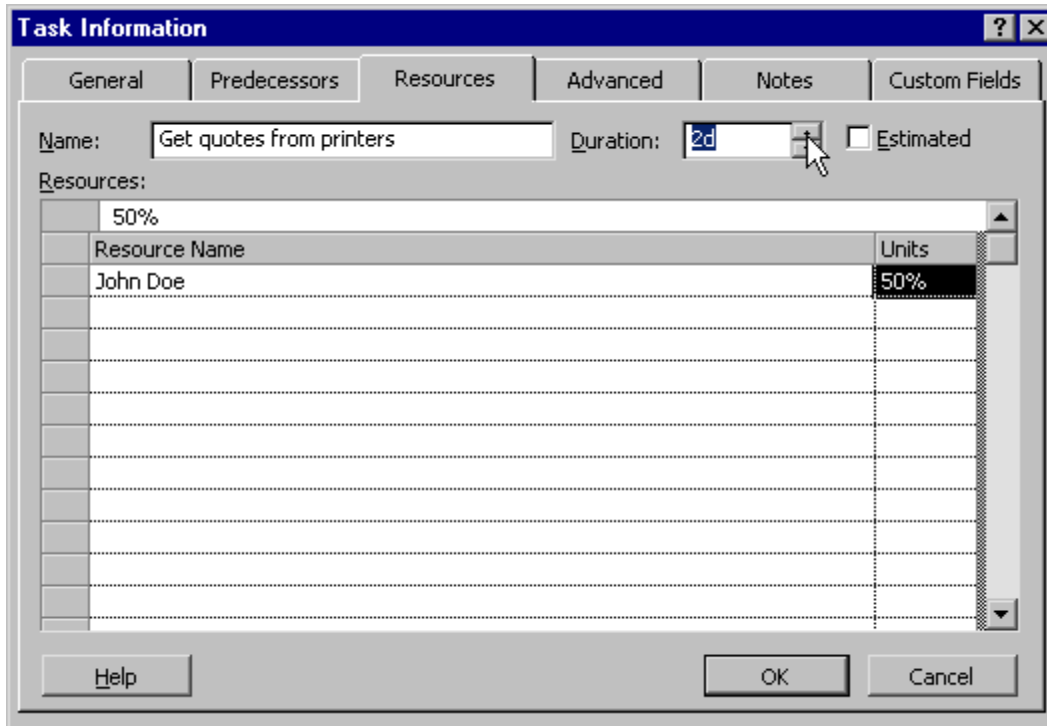
Using Filters to Review Resource Allocations

- Open New Product Brochure - Resource Conflicts from the Project XP Foundation Samples folder.
- From the main menu, choose **View > Resource Sheet**.
- From the main menu, choose **Project > Filtered for > Overallocated Resources**.
- Notice that the only resource listed is Jane Smith, who is overallocated on one day..
- From the main menu, choose **Project > Filtered for > All Resources** to clear the filter.

Scheduling Part-time Work

- In the **Gantt Chart** view, double click on the "Get quotes from printers" task to open the **Task Information** dialog box.
- Click on the **Resources** tab.
- In the first row of the **Resource Name** column, click on the down arrow at the left. Select **John Doe**.
- Change the percentage of units to 50%.
- Change the **Duration** to 2d:

SAMPLE

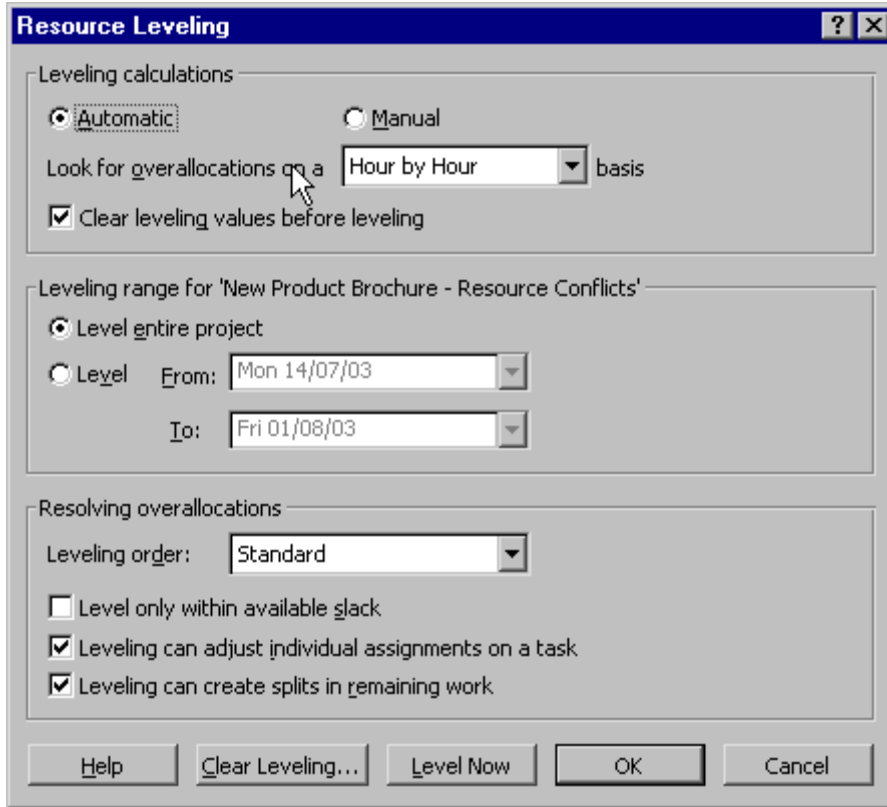


- Click **OK**.
- From the main menu, choose **View > Resource Graph**. Notice that the overallocation was resolved by assigning part-time work to help out.
- **Close** Project 2002 **without** saving changes.

Leveling Resources

- Open New Product Brochure - Resource Conflicts from the Project XP Foundation Samples folder.
- From the main menu, choose **Tools > Level Resources** to open the **Resource Leveling** dialog box.
- Select **Automatic** from the **Leveling calculations** portion:

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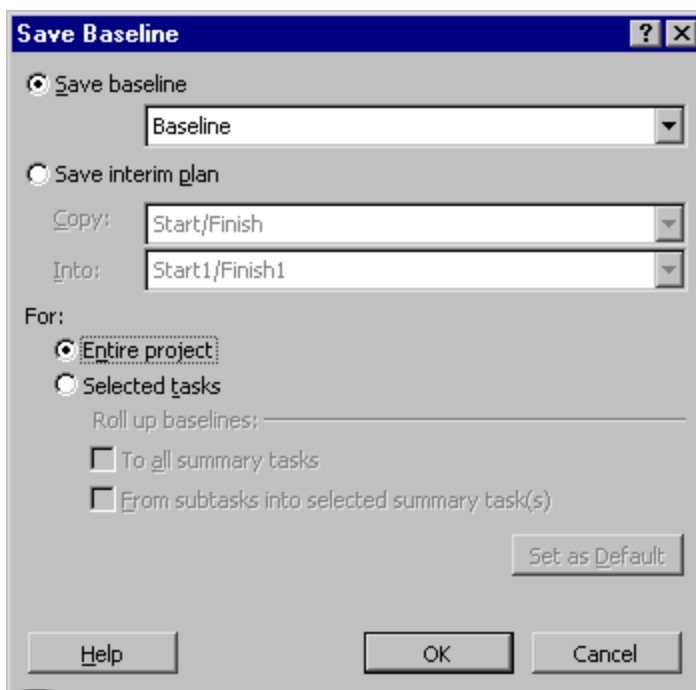
- Click **OK**.
- From the main menu, choose **View > More Views > Leveling Gantt View**. Click **Apply**.
- Review the changes.
- If you are not happy with the changes, from the main menu, choose **Tools > Level Resources**.
- Click on Clear Leveling.
- In the **Clear Leveling** dialog box, select **Entire project** and click **OK**.

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Updating and Tracking Projects

Setting the Baseline

- Open New Product Brochure - Updating and Tracking from the Project XP Foundation Samples folder.
- From the main menu, choose **Tools > Tracking > Save Baseline** to open the **Save Baseline** dialog box.
- Select Save baseline.
- Select **Entire project** in the **For** portion of the dialog box:



- Click **OK**.

Recording Actual Start Dates

- Split the window by choosing **Window > Split** from the main menu.
- Click anywhere in the bottom pane, and from the main menu, choose **View > More Views > Task Details Form**.
- Click **Apply**.
- In the top pane, select the "**Research New Product**" task by highlighting it.
- In the bottom pane, choose **Actual** from the radio buttons:

The screenshot shows the 'Task Details' form for a task named 'Research New Product'. The form includes fields for Name, Duration (1d?), Effort driven (checked), OK, and Cancel buttons. The Dates section has Start and Finish dropdowns set to 'NA', and radio buttons for Current, Baseline, and Actual (selected). The Constraint section has a dropdown set to 'As Soon As Possible' and a Date dropdown set to 'NA'. The Task type is 'Fixed Units', WBS code is '1.1', and Priority is '500'. The % Complete is '0%'. Below the form are two tables:

ID	Resource Name	Units	Work
1	Jane Smith	100%	8h

ID	Predecessor Name	Type	Lag
----	------------------	------	-----

- Use the **Start** drop-down calendar in the **Dates** section to select **Mon 14/07/03** as the actual start date.

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Printing Reports

Starting the Report Dialog Box

- From the main menu, choose **View > Reports** to open the **Reports** dialog box.

Using the Project Summary Report

- Double click on the **Overview** icon in the **Reports** dialog box to open the **Overview Reports** dialog box.
- Click on **Project Summary** and then click **Select**.
- The **Project Summary** report is generated and displayed in the print preview mode:

SAMPLE

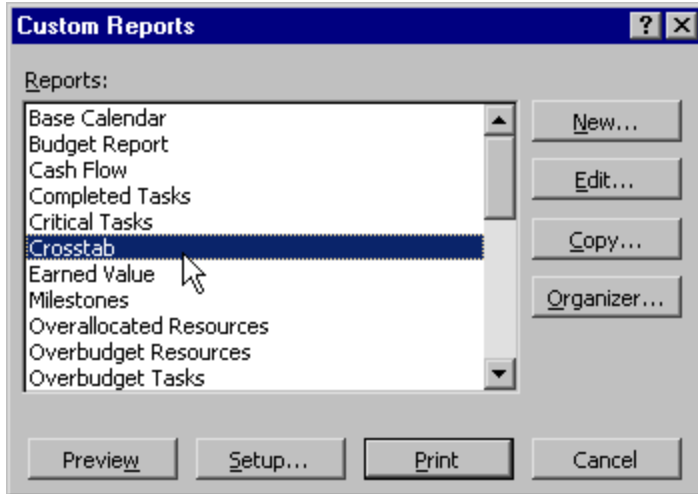
New Product Brochure - Updating and Tracking
Microsoft
as of Thu 10/07/03

Dates			
Start:	Mon 14/07/03	Finish:	Fri 01/08/03
Schedule Start:	Mon 14/07/03	Schedule Finish:	Fri 01/08/03
Actual Start:	Mon 14/07/03	Actual Finish:	N/A
Start Variance:	0 days	Finish Variance:	0 days
Duration			
Scheduled:	15 days?	Remaining:	15 days?
Schedule:	15 days?	Actual:	0 days
Variance:	0 days?	Percent Complete:	0%
Work			
Scheduled:	120 hrs	Remaining:	120 hrs
Schedule:	120 hrs	Actual:	0 hrs
Variance:	0 hrs	Percent Complete:	0%
Costs			
Scheduled:	\$2,280.00	Remaining:	\$2,280.00
Schedule:	\$2,280.00	Actual:	\$0.00
Variance:	\$0.00		
Task Status		Resource Status	
Tasks not yet started:	10	Work Resources:	3
Tasks in progress:	2	Overallocated Work Resources:	0
Tasks completed:	0	Material Resources:	1
Total Tasks:	12	Total Resources:	4

- Click **Close** to return to the **Reports** dialog box.

Using Custom Reports

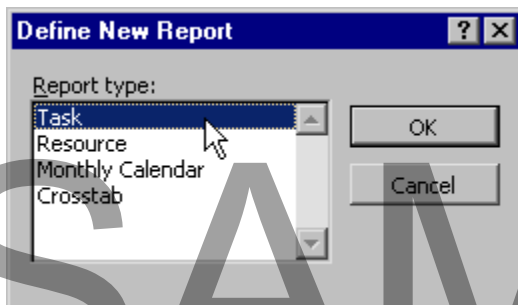
- Double click on the **Custom** icon in the **Reports** dialog box to open the **Custom Reports** dialog box.
- Select **Crosstab** from the list of reports:



- Click on **Preview**.
- The **Crosstab** report is displayed in the print preview mode.
- Click **Close** to return to the **Custom Reports** dialog box.

Creating a New Report

- From the main menu, choose **View > Reports**.
- Double click on the **Custom** icon in the **Reports** dialog box.
- Click **New**.
- Select **Task** from the report types listed:



- Click **OK**.
- In the **Definition** tab, type **Custom Report** in the **Name** box.
- Click **OK**.
- Note that your **Custom Report** is listed among the other reports in the **Custom Reports** dialog box.