



**CHELtenham**  
COURSEWARE LTD

# Microsoft Project 2003

Manual - Foundation Level  
*European Edition*



# CHELTHENHAM

C O U R S E W A R E L T D

© 1995-2006 Cheltenham Courseware Ltd.

Email: [info@cctglobal.com](mailto:info@cctglobal.com)

Internet: <http://www.cctglobal.com>

All trademarks acknowledged. E&OE.

© Cheltenham Courseware Ltd. 1995-2006 No part of this document may be copied without written permission from Cheltenham Courseware unless produced under the terms of a courseware site license agreement with Cheltenham Courseware.

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

### **Sample versions of courseware from Cheltenham Courseware**

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

### **For current license information**

This document may only be used under the terms of the license agreement from Cheltenham Courseware.

Cheltenham Courseware reserves the right to alter the licensing conditions at any time, without prior notice.

Please see the site license agreement available at:

**[www.cheltenhamcourseware.com/agreement](http://www.cheltenhamcourseware.com/agreement)**



Look for this icon for the **New** features of this software version.



Look for this icon for the **Enhanced** features of this software version.

|   |           |
|---|-----------|
| <b>INSTALLING THE SAMPLE FILES</b> .....            | <b>5</b>  |
| <b>INTRODUCTION TO MICROSOFT PROJECT 2003</b> ..... | <b>6</b>  |
| WHAT IS PROJECT 2003? .....                         | 6         |
| THE PROJECT 2003 ENVIRONMENT .....                  | 6         |
| TOOLBARS .....                                      | 15        |
| REVIEW QUESTIONS .....                              | 21        |
| <b>DEFINING THE PROJECT</b> .....                   | <b>22</b> |
| CREATING A NEW PROJECT .....                        | 22        |
| OPENING A PROJECT .....                             | 22        |
| USING FILE PROPERTIES .....                         | 23        |
| ENTERING START AND FINISH DATES .....               | 24        |
| ESTABLISHING A PROJECT CALENDAR .....               | 26        |
| SAVING .....  | 28        |
| QUITTING AND CLOSING .....                          | 29        |
| REVIEW QUESTIONS .....                              | 30        |
| <b>TASKS</b> .....                                  | <b>31</b> |
| ENTERING TASKS .....                                | 31        |
| ENTERING TASK DURATIONS .....                       | 32        |
| ENTERING SUBTASKS .....                             | 34        |
| USING RECURRING TASKS .....                         | 36        |
| USING TASK NOTES .....                              | 37        |
| ASSIGNING MILESTONES .....                          | 39        |
| ENTERING CONSTRAINTS .....                          | 40        |
| EDITING TASKS .....                                 | 42        |
| DELETING TASKS .....                                | 43        |
| MOVING TASKS .....                                  | 43        |
| CREATING DEPENDENCIES .....                         | 44        |
| REVIEW QUESTIONS .....                              | 52        |
| <b>RESOURCES</b> .....                              | <b>53</b> |
| CREATING A RESOURCE LIST .....                      | 53        |
| ENTERING WORKING TIME .....                         | 55        |
| ENTERING COSTS .....                                | 56        |
| ENTERING NOTES .....                                | 57        |
| ASSIGNING RESOURCES TO A TASK .....                 | 58        |
| REVIEW QUESTIONS .....                              | 62        |
| <b>VIEWS</b> .....                                  | <b>63</b> |
| INTRODUCTION TO VIEWS .....                         | 63        |
| USING THE CALENDAR VIEW .....                       | 65        |
| USING THE GANTT CHART VIEW .....                    | 66        |
| USING THE NETWORK DIAGRAM VIEW .....                | 68        |
| USING THE TASK USAGE VIEW .....                     | 70        |
| USING THE TRACKING GANTT VIEW .....                 | 72        |
| USING THE RESOURCE GRAPH VIEW .....                 | 73        |
| USING THE RESOURCE SHEET VIEW .....                 | 74        |
| USING THE RESOURCE USAGE VIEW .....                 | 75        |
| REVIEW QUESTIONS .....                              | 76        |
| <b>PRINTING REPORTS</b> .....                       | <b>77</b> |
| VIEWING AND PRINTING REPORTS .....                  | 77        |
| USING PRINT PREVIEW .....                           | 77        |
| UNDERSTANDING PAGE SETUP .....                      | 79        |
| UNDERSTANDING THE PRINT DIALOG BOX .....            | 79        |
| STARTING THE REPORTS DIALOG BOX .....               | 80        |

|  |    |
|--|----|
| UNDERSTANDING THE DIFFERENT TYPES OF REPORTS ..... | 81 |
| THE PROJECT GUIDE FOR PRINTING WIZARD.....         | 86 |
| CUSTOMISING REPORTS.....                           | 88 |
| REVIEW QUESTIONS .....                             | 90 |

**SAMPLE**

## Installing the Sample Files

- Use Windows Explorer to create a folder called **Project 2003 Foundation Samples**, in the **My Documents** folder.
- If you are installing the sample files from the CD-ROM, place the CD-ROM in the CD drive and copy the files from the **project\_2003\_foundation\_eur\exercise\_files** to the **My Documents\Project 2003 Foundation Samples** folder.
- If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.
- **Notes for tutors:**  
The above instructions are for Windows that has not been set-up for a multi-user environment (with individual profiles). The instructions above may require modification within a Windows multiuser environment. Where possible pre-install the relevant work files prior to use by students/delegates.

SAMPLE

## Introduction to Microsoft Project 2003

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

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

## What is Project 2003?

### Project 2003

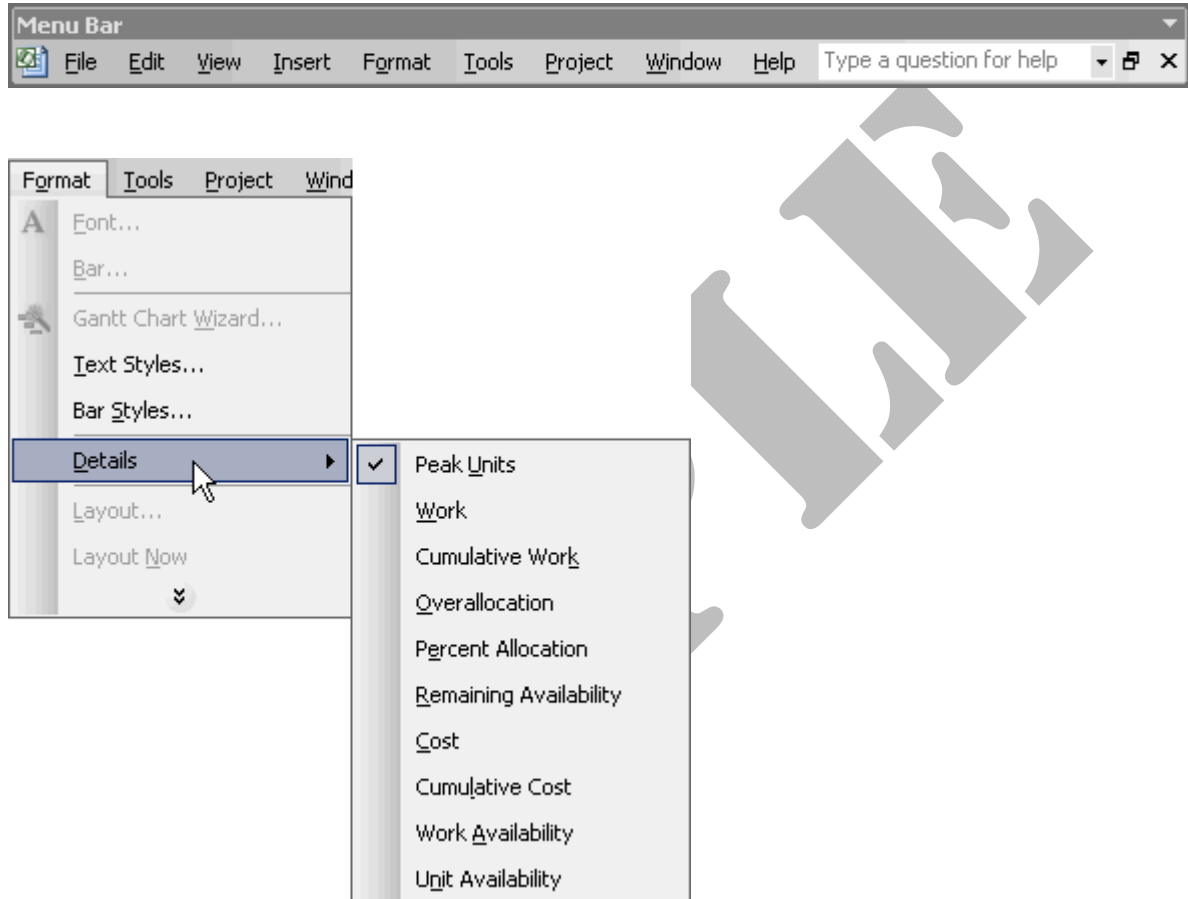
- **Microsoft Project 2003** is Microsoft's answer to project management. It provides all the tools you need for effective planning, tracking, problem solving, sharing, and completing a project in keeping with conventional management principles and practices.
- It can be used for a project of any size.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



## The Project 2003 Environment

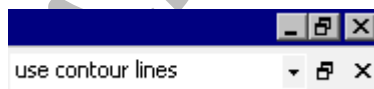
## Using the Main Menu

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

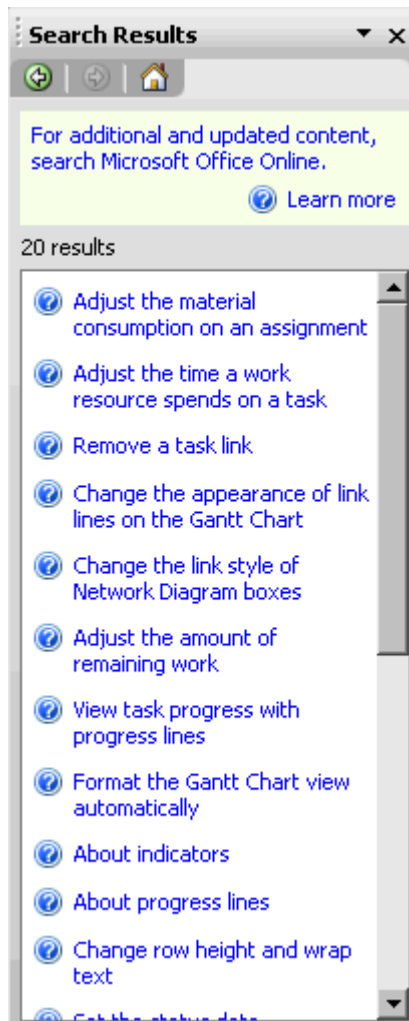


## Using the Ask a Question Box

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



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



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

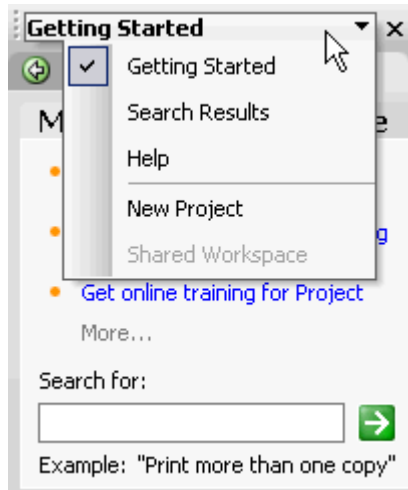
---

## Using Task Panes

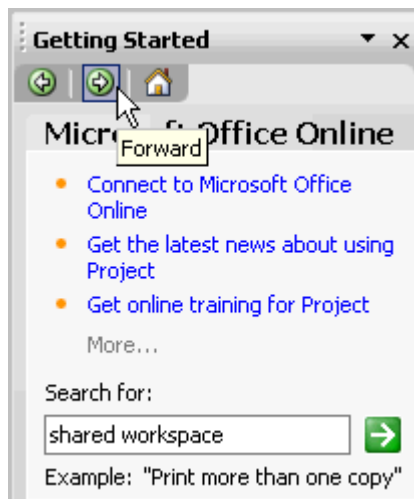
- The **Task Pane** is a like a dialog box which lists some of the most common tasks which you might want to accomplish with Project. The Task Pane automatically opens when Project is started for the first time. If the pane does not open, open it by selecting **View > Toolbars > Task Pane** from the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

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





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



### To show or hide the Task Pane

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

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

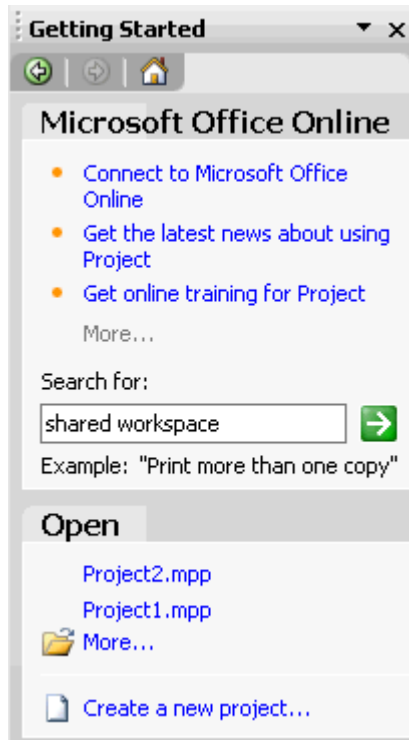
- To hide the task pane, right click on any toolbar and deselect **Task Pane**

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

---

## Using the Getting Started Pane

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

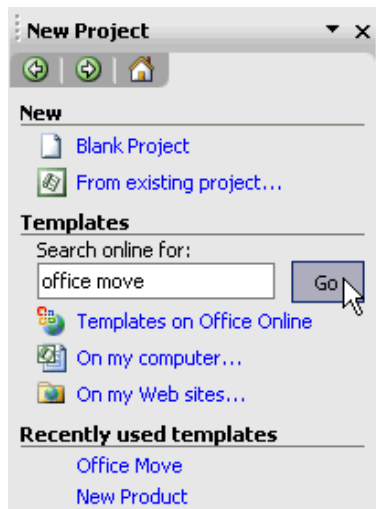


- Clicking on one of the listed projects will open the project.
- Clicking on the **More** link, will display the **Open** dialog box.
- Clicking on the **Create a new project** link, will display the **New Project** pane.

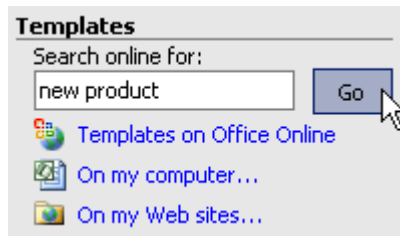
---

## Using the New Project Pane

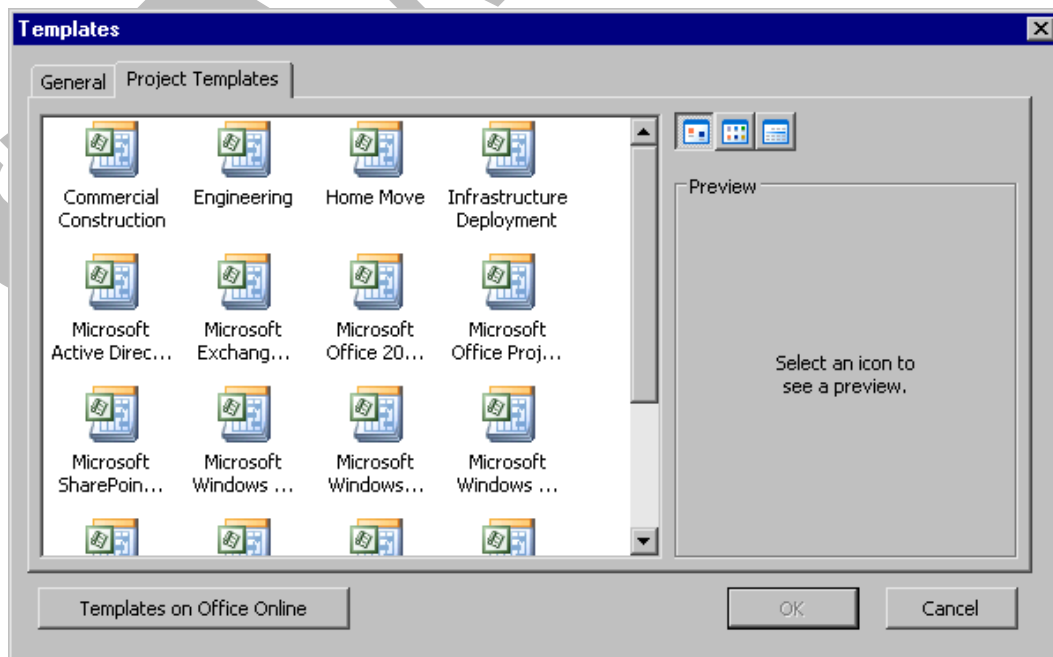
- The **New Project Pane** allows you to create a new project from scratch, from an existing project, or from a template:



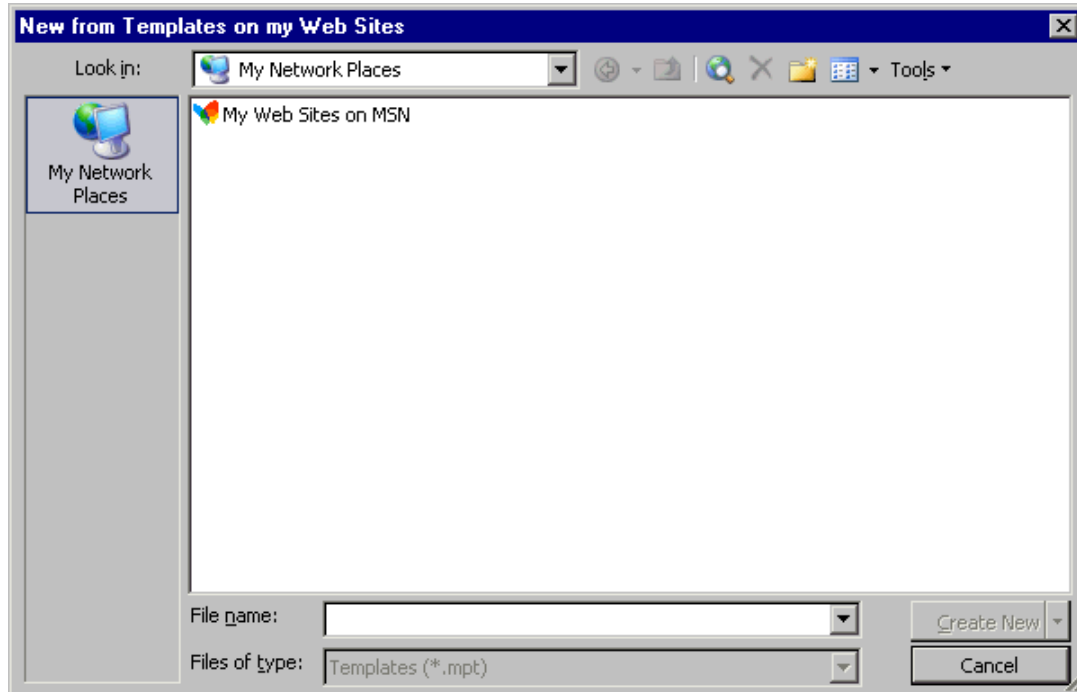
- Project 2003 now allows you to download templates from **Microsoft Office Online**. Simply enter the type of template you would like to search for in the **Search online for** text box and click on **Go**:



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



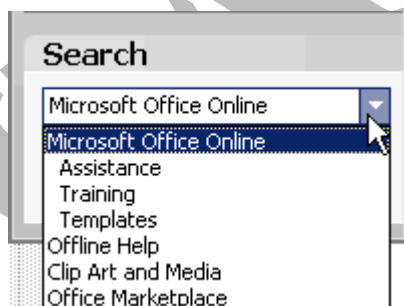
- Click on **On my Web sites** to open the **New from Templates on my Web Sites** dialog box and browse to find the desired template:



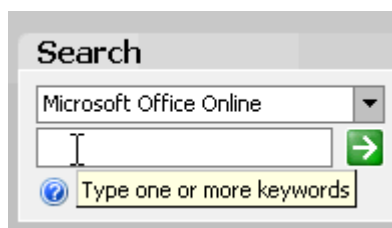
- The New Project pane also lists **Recently used templates** for you to select from.

### Using the Search Results Pane

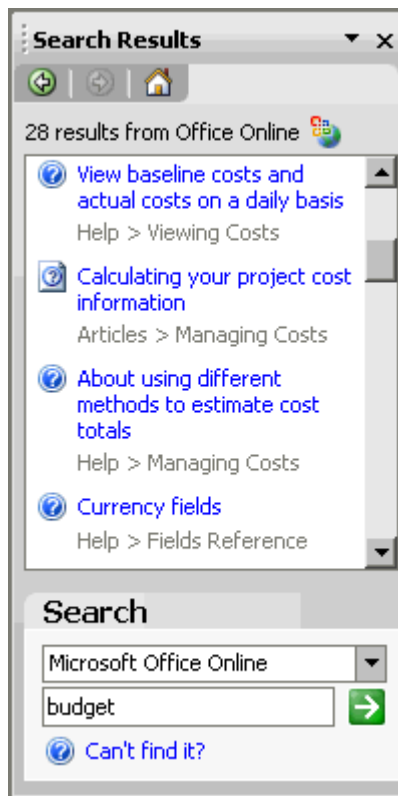
- The **Search Results Pane** has two areas. The upper portion is for displaying the results of a search, and the lower portion is for entering search criteria.
- In the **Search** area, you can use the drop-down menu to choose where you would like Project to look for the information:



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



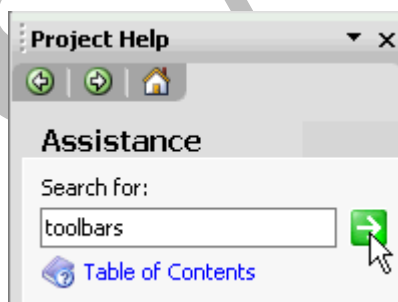
- Project displays the search results in the upper portion of the task pane:



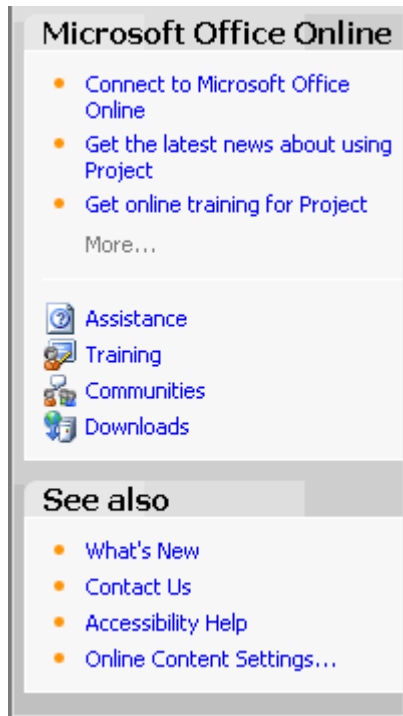
- Simply click on the link to display the Microsoft Office Help window.

### Using the Project Help Pane

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



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



---

## Using Microsoft Project Help

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

---

### To access Microsoft Project Help

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



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

**OR** press the **F1** key.

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

---

## Accessing the Office Assistant

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

### To show the Office Assistant

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

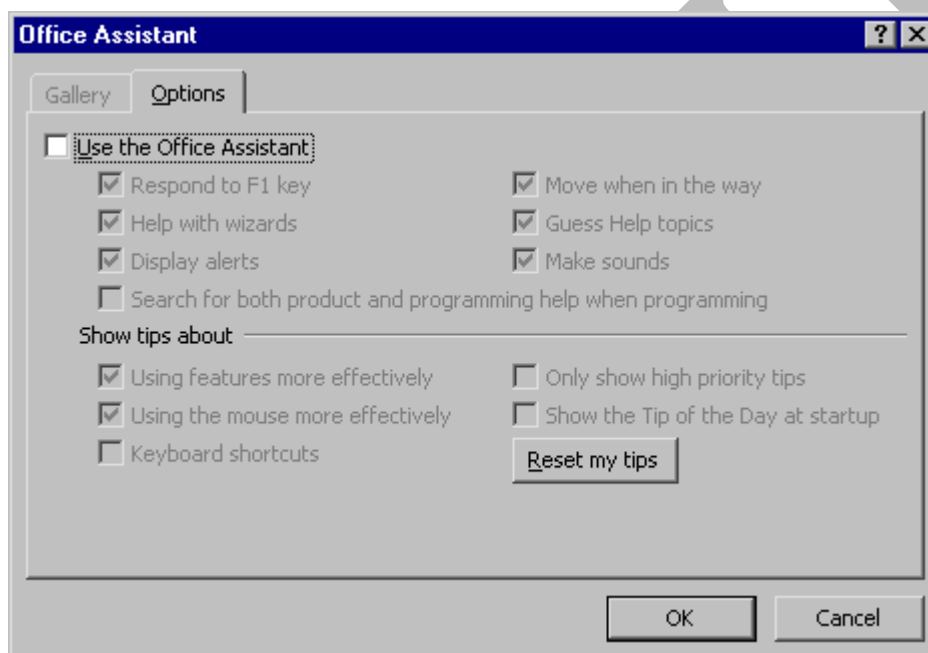
### To hide the Office Assistant

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

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

### To turn the Office Assistant off

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



## Toolbars

---

### Using Toolbars

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

### Showing a Toolbar

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

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

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

---

### Hiding a Toolbar

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

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

---

### Moving a Toolbar

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



---

### Using the Standard Toolbar

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



**New** - creates new project.



**Open** - opens an existing project.



**Save** - saves the current project.



**Search** - performs a search.



**Print** - prints the project.



**Print Preview** - changes display to print preview.



**Spelling** - performs a spell check.





**Cut** - cuts the selected range to the Office clipboard.



**Copy** - copies the selected range to the Office clipboard.



**Paste** - pastes the last item from the Office clipboard.



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



**Undo** - undoes the last action.



**Hyperlink** - inserts a hyperlink.



**Link Tasks** - links selected tasks.



**Unlink Tasks** - unlinks selected tasks.



**Split Task** - splits selected tasks.



**Task Information** - displays the Task Information dialog box.



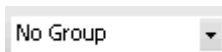
**Task Notes** - displays the Notes tab in the Task Information dialog box.



**Assign Resources** - opens the Assign Resource dialog box.



**Publish All Information** - publishes to the Microsoft Project Server.



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



**Zoom In** - increases the zoom.



**Zoom Out** - decreases the zoom.



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



**Copy Picture** - opens the Copy Picture dialog box.



**Microsoft Project Help** - opens the Project Help Pane.

---

## Using the Formatting Toolbar

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



**Outdent** - makes the selected task a summary task.



**Indent** - makes the selected task a subtask.



**Show Subtasks** - shows subtasks.



**Hide Subtasks** - hides subtasks.



**Hide Assignments** - hides assignments.



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



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



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



**Bold** - changes the selected text to bold.



**Italic** - changes the selected text to italic.



**Underline** - underlines the selected text.



**Align Left** - aligns the selected text to the left.



**Center** - aligns the selected text to centre.



**Align Right** - aligns the selected text to the right.



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



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



**Gantt Chart Wizard** - starts the Gantt Chart Wizard.

---

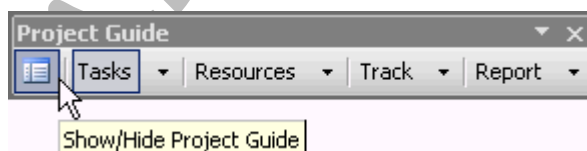
## Using the Project Guide

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

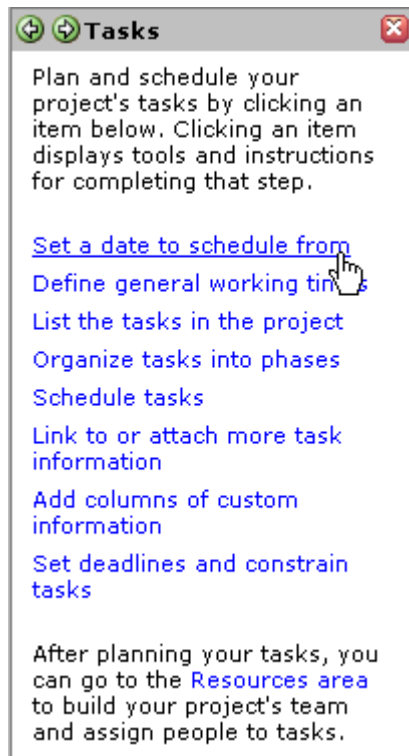
---

## To Show the Project Guide

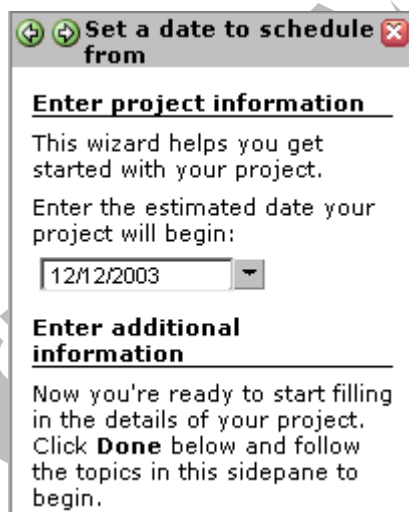
- To view the Project Guide, from the main menu, select **Tools > Options**. Click on the **Interface** tab and check off **Display Project Guide**.
- Then from the main menu, select **View > Toolbars > Project Guide**. The Project guide toolbar will be displayed.
- Click on the **Show/Hide Project Guide**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



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



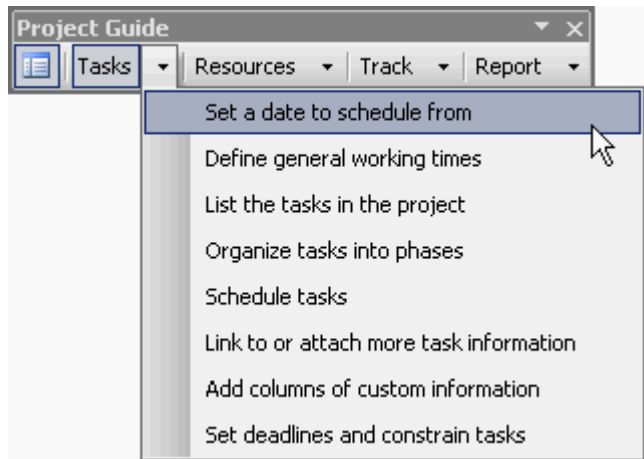
- Click on the blue links to go to a particular subject where Project will guide you through each step:



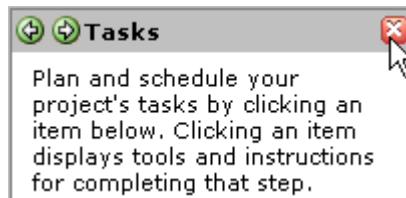
- You can easily navigate from one topic to the next using the **Project Guide toolbar**:



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



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



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

## Review Questions

### How would you:

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

## Defining the Project

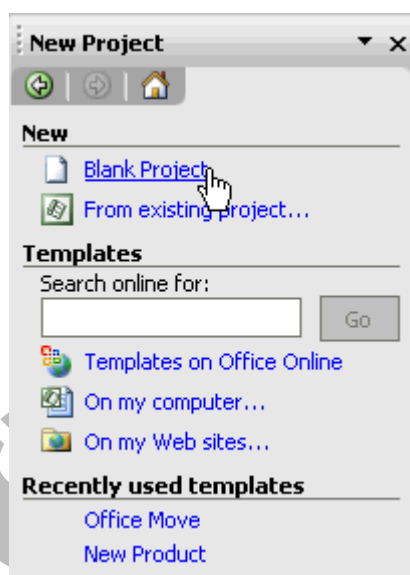
When you have completed this learning module you will have seen how to:

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

## Creating a New Project

### Starting a New Project

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



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

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

## Opening a Project

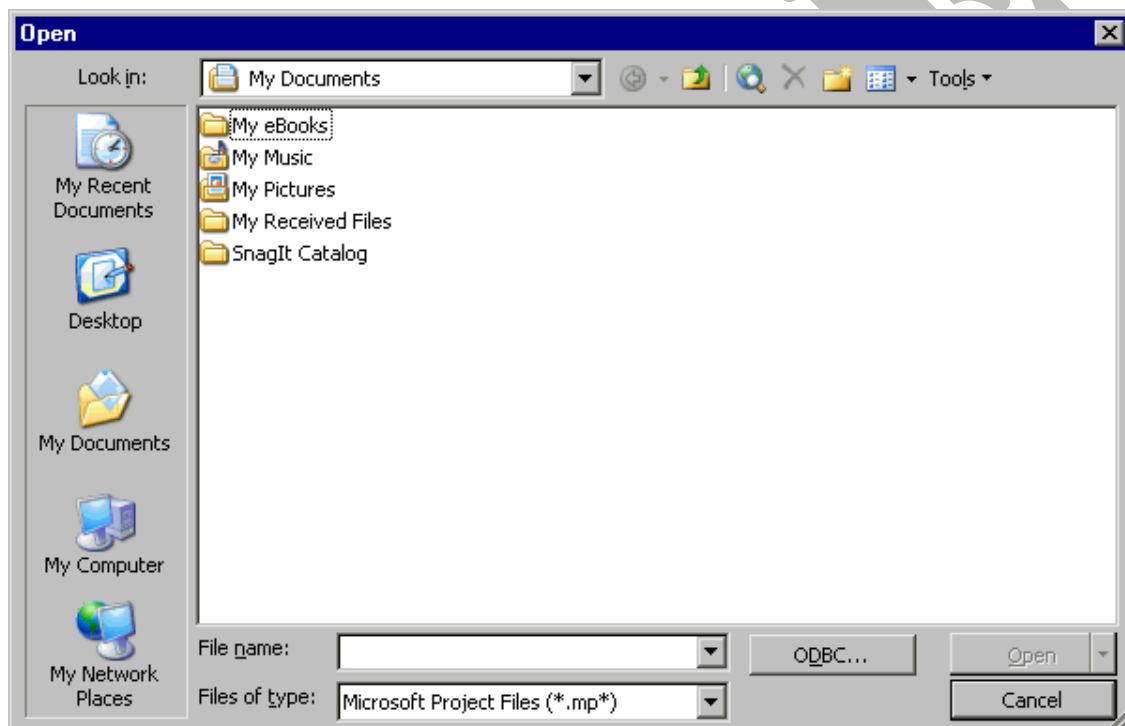
## Opening a Project

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

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

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

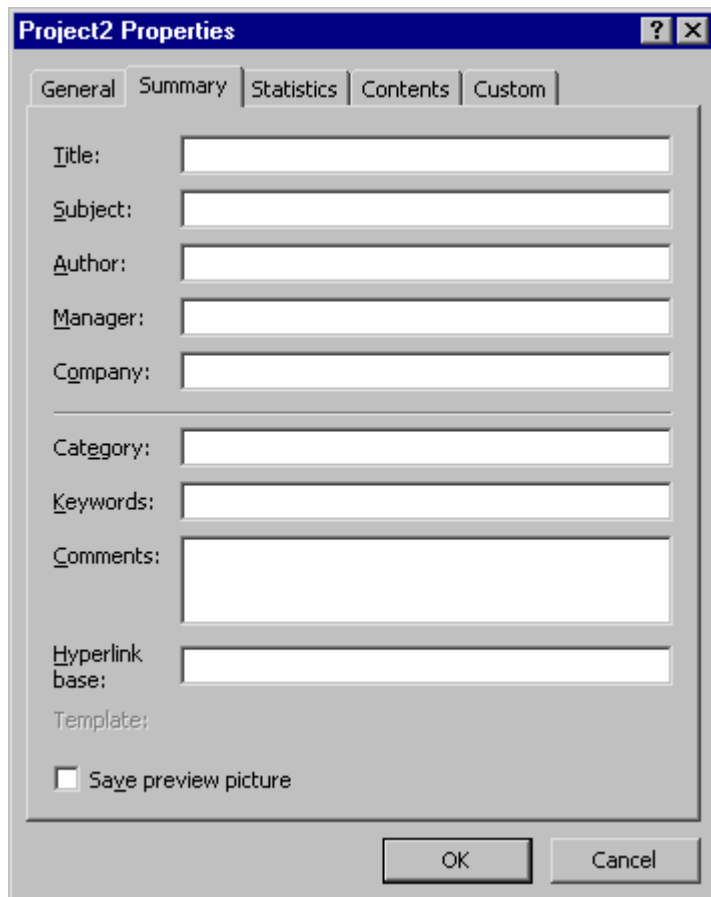
- This will display the **Open** dialog box. Browse to find the project you wish to open. Open either by **clicking on** the file and then clicking **Open**, or by **double clicking** it:



## Using File Properties

### Utilising File Properties

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



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

## Entering Start and Finish Dates

### Inputting Start and Finish Dates

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

### To Enter Project Information

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



**Project Information for 'Project1'**

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

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

Schedule from: Project Start Date      Calendar: Standard

All tasks begin as soon as possible.      Priority: 500

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

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

**Project Information for 'Project1'**

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

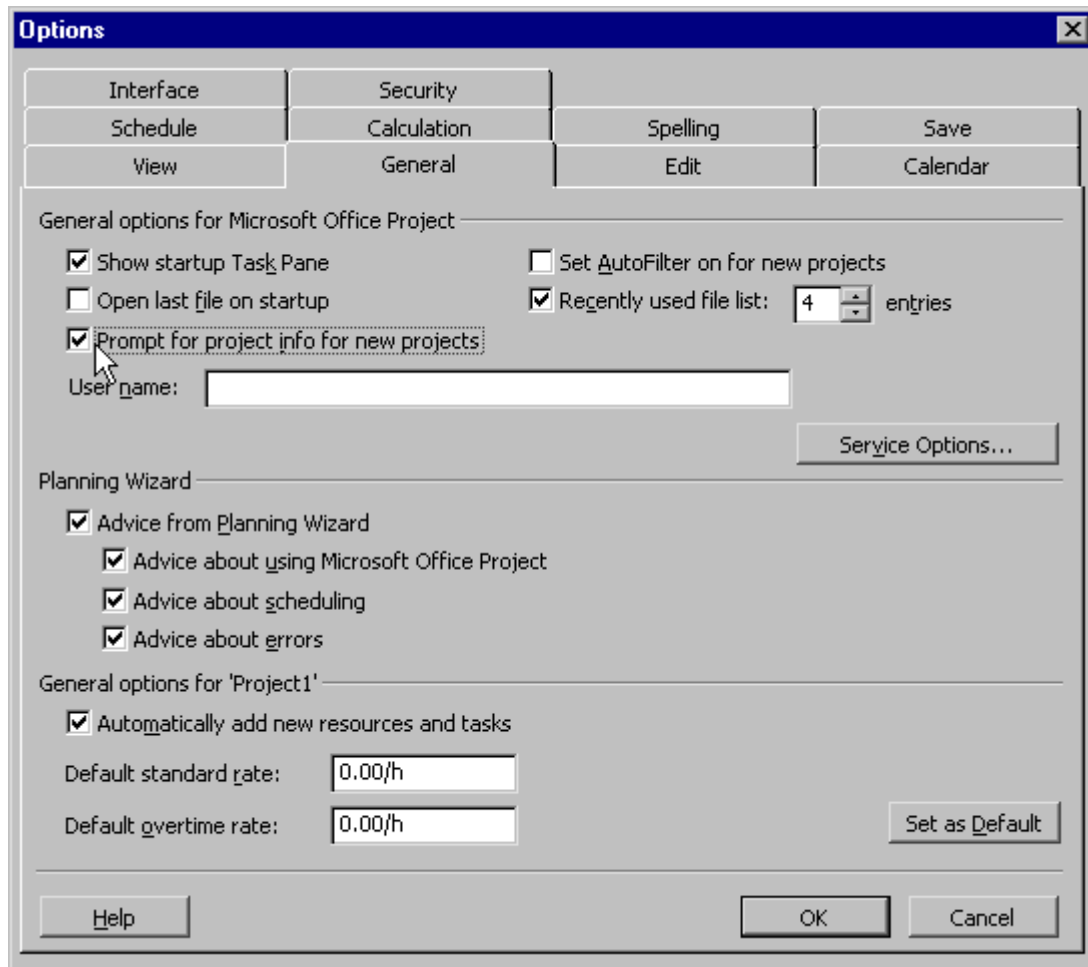
Finish date: Fri 12/12/03      Status date: NA

Schedule from: Project Start Date (dropdown menu open showing Project Start Date and Project Finish Date)      Calendar: Standard

All tasks      Priority: 500

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

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



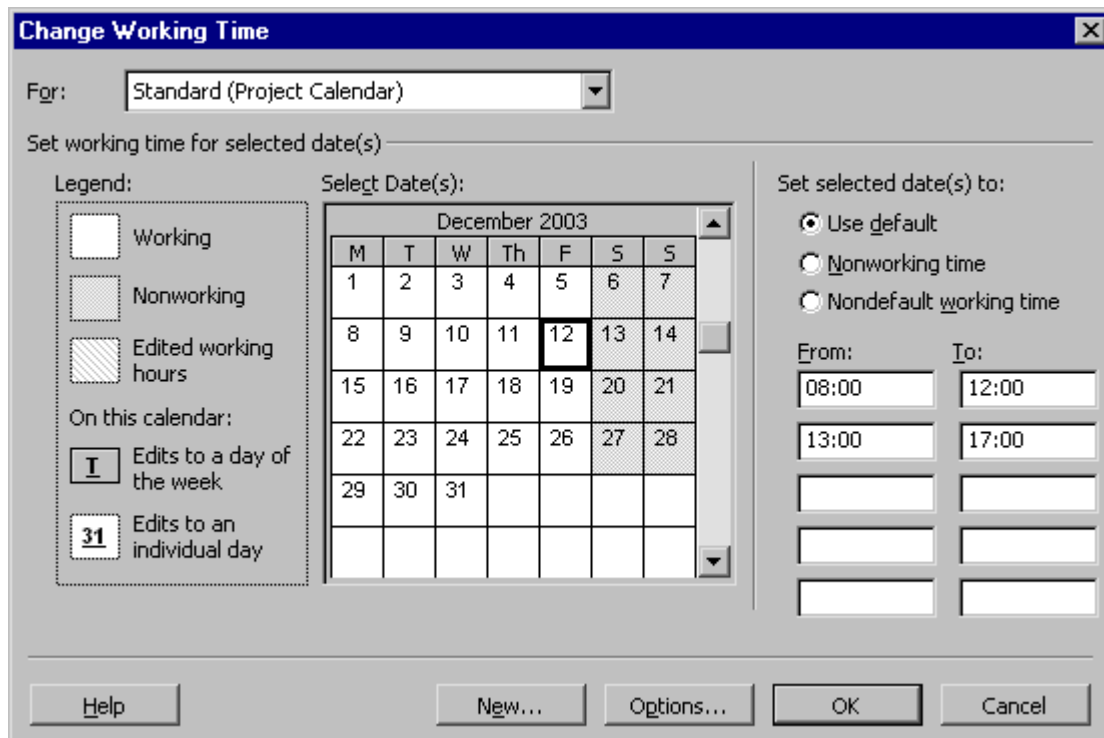
## Establishing a Project Calendar

### Setting up a Project Calendar

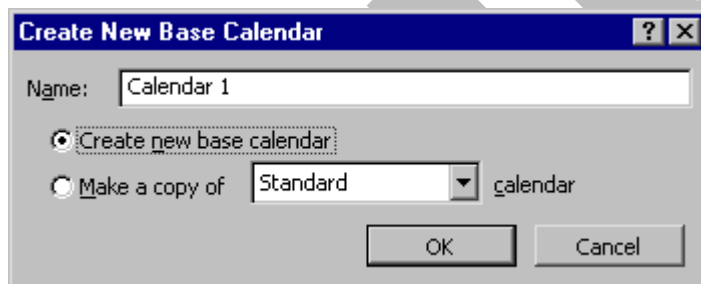
- Project supplies three basic calendars (**Standard**, **Night Shift** and **24 Hours**) which you can use as foundations to create your own base calendar. You can make a calendar which indicates general working times for each resource or group of resources. Project will use this information for things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

### Making a New Calendar

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



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



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

## Changing Calendar Options

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

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

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

**Options**

|           |             |          |          |
|-----------|-------------|----------|----------|
| Interface | Security    | Spelling | Save     |
| Schedule  | Calculation | Spelling | Save     |
| View      | General     | Edit     | Calendar |

Calendar options for 'Project1'

Week starts on: Monday

Fiscal year starts in: January

Use starting year for FY numbering

Default start time: 08:00

Default end time: 17:00

Hours per day: 8.00

Hours per week: 40.00

Days per month: 20

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

Set as Default

Help OK Cancel

### To change a Calendar

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

## Saving

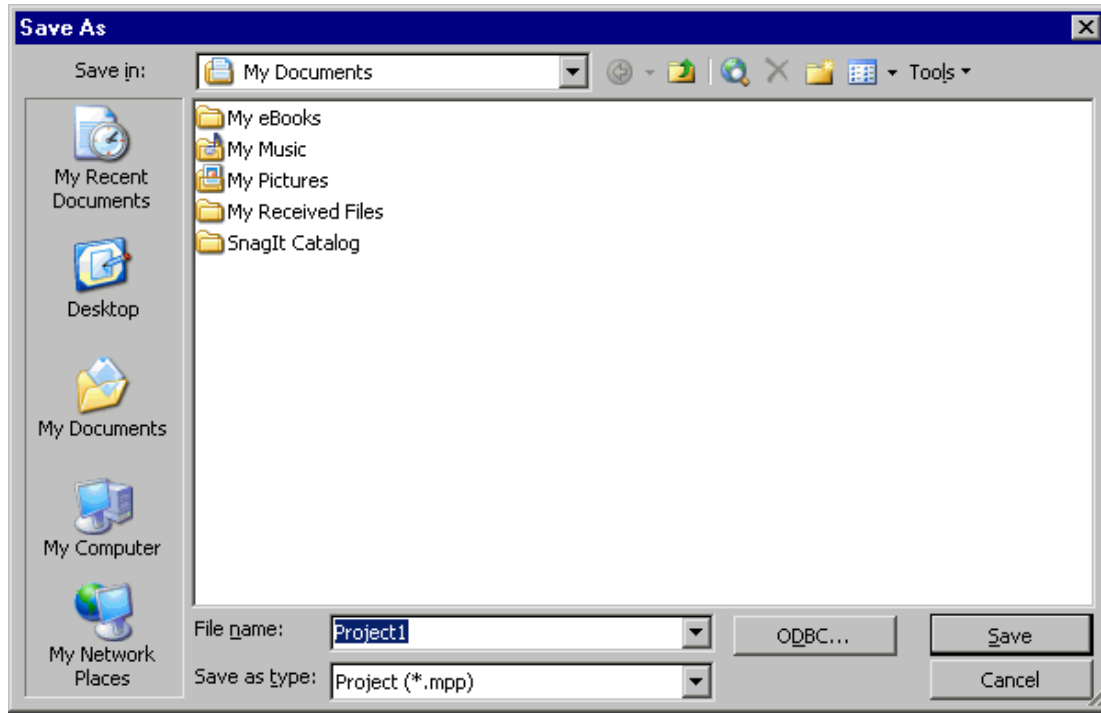
### Saving Your Project

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

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

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

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



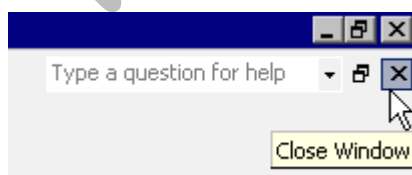
- **Browse** to find the location where you would like to save your project, enter a name in the **File name** text box, and click **Save**.

## Quitting and Closing

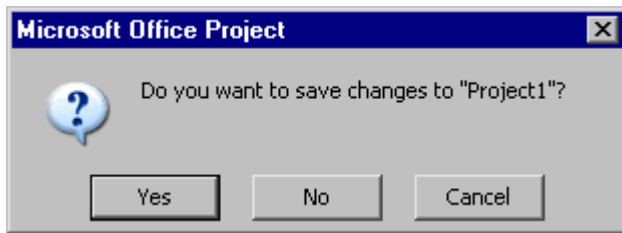
### Closing a Project

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

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



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

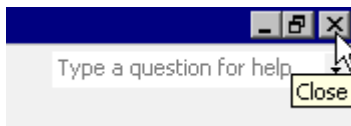


---

### Quitting Project 2003

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

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



---

### Review Questions

**How would you:**

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

## Tasks

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

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

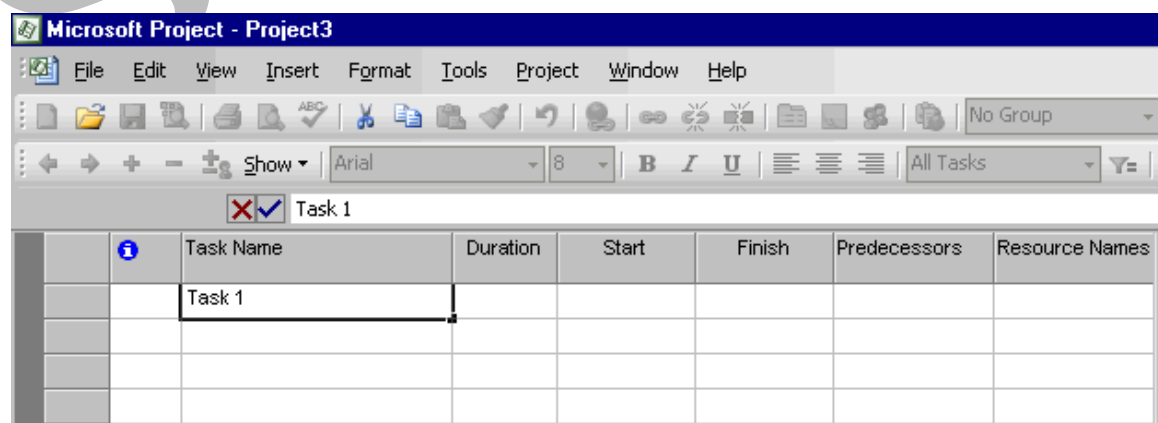
### Entering Tasks

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

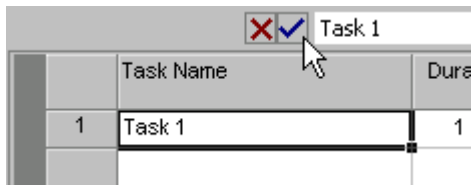
### Entering Tasks

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

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



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



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



on the **Standard** toolbar

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

**OR double-click** on the task

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

## Entering Task Durations




## Entering Task Durations

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

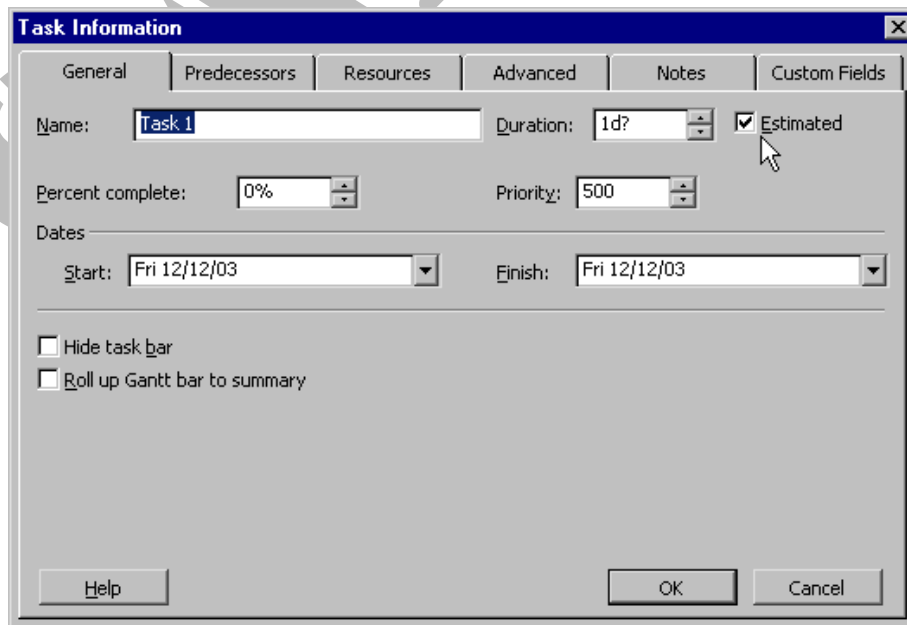
**m** Minutes  
**h** Hours  
**d** Days  
**ed** Elapsed days  
**w** Weeks  
**mo** Months

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

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

|   | Task Name | Duration   |
|---|-----------|--|
| 1 | Task 1    | 1 day?  |

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



**Task Information**

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

Name:  Duration:   Estimated

Percent complete:  Priority:

Dates

Start:  Finish:

Hide task bar  
 Roll up Gantt bar to summary

Help OK Cancel

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

## Entering Subtasks

### Entering Subtasks


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


### To enter a subtask

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

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

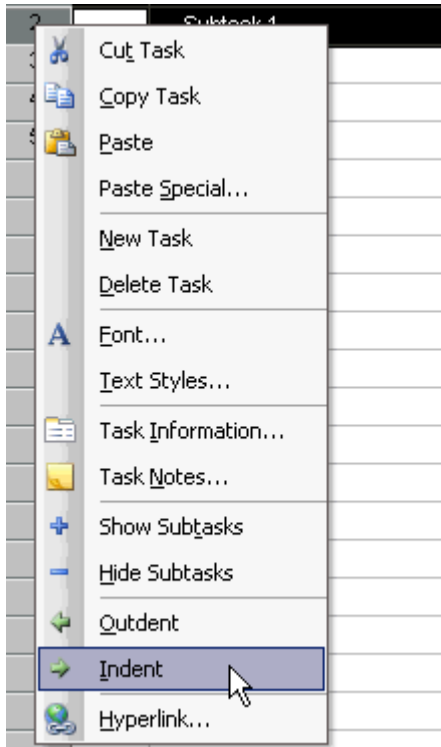
- To create a new row, from the main menu, choose **Insert > New Task**  
**OR** press the **Insert** key on your keyboard.
- This will create a new task row:

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

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

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

from the drop-down menu:



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

|   |  | Task Name     | Duration      | Start               | Finish              |
|---|--|---------------|---------------|---------------------|---------------------|
| 1 |  | <b>Task 1</b> | <b>1 day?</b> | <b>Fri 12/12/03</b> | <b>Fri 12/12/03</b> |
| 2 |  | Subtask 1     | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |
| 3 |  | Task 2        | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |
| 4 |  | Task 3        | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |
| 5 |  | Task 4        | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |



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


|   |  | Task Name        | Duration      | Start               | Finish              |
|---|--|------------------|---------------|---------------------|---------------------|
| 1 |  | <b>Task 1</b>    | <b>1 day?</b> | <b>Fri 12/12/03</b> | <b>Fri 12/12/03</b> |
| 2 |  | <b>Subtask 1</b> | <b>1 day?</b> | <b>Fri 12/12/03</b> | <b>Fri 12/12/03</b> |
| 3 |  | Sub Subtask      | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |
| 4 |  | Task 2           | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |
| 5 |  | Task 3           | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |
| 6 |  | Task 4           | 1 day?        | Fri 12/12/03        | Fri 12/12/03        |

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

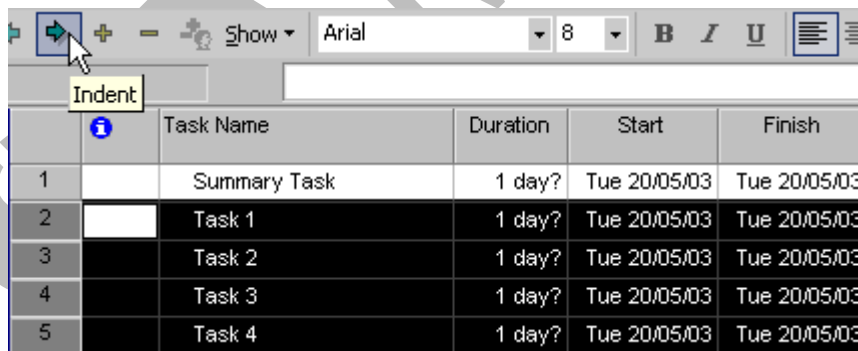
## Creating a Summary Task


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

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

- To create a new row, from the main menu, choose **Insert > New Task**  
**OR** press the **Insert** key on your keyboard.
- This will create a new task row. Enter the name of the summary task. Accept the new task name by clicking on the check mark in the entry bar, or by moving to another cell.
- Select the rows which you would like to group under the summary task by highlighting them.
- Click on the **Indent** icon  on the **Formatting** toolbar to indent the tasks to make them subordinate

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



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

## Using Recurring Tasks



### Entering Recurring Tasks

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

## To create a Recurring Task

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

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

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

## Using Task Notes

## Entering Task Notes

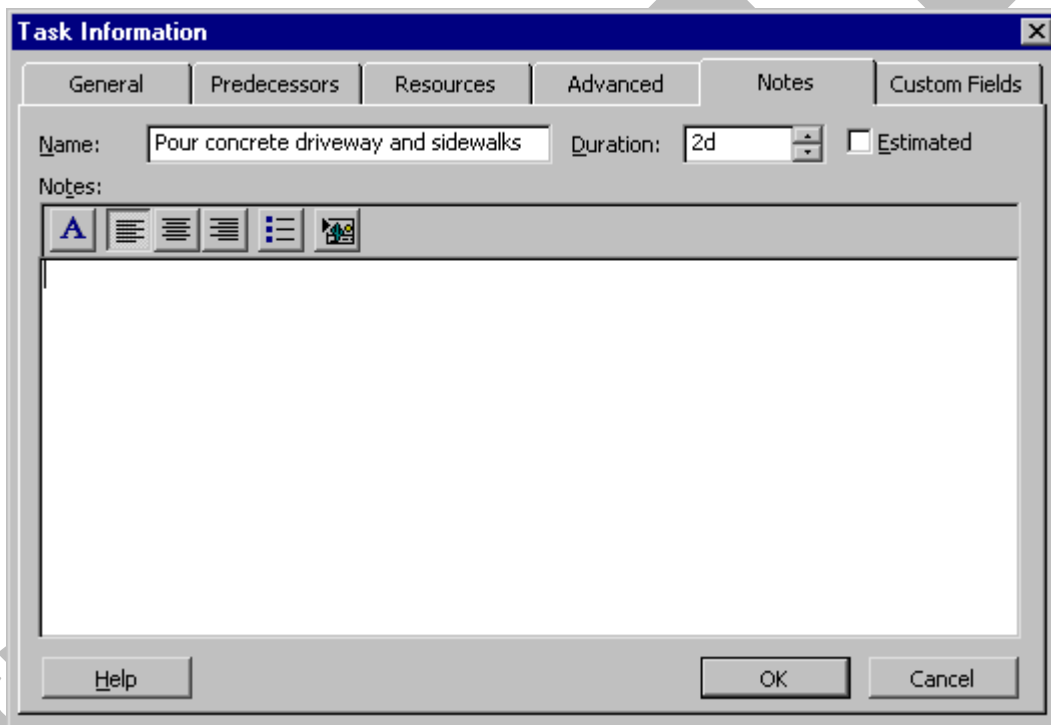
- Notes can be attached to a task to quickly display information regarding anything related to it. Notes can be displayed onscreen and included in printed reports.

### To enter a Task Note:




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

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





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



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

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









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

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

## Assigning Milestones

### Assigning Milestones

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

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

### To create a Milestone

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

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

- Click **OK**.

## Entering Constraints

### Adding Constraints

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

#### **As Soon as Possible**

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

#### **As Late as Possible**

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

#### **Finish No Earlier Than/**

#### **Finish No Later Than**

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

#### **Must Finish On/**

#### **Must Start On**

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

#### **Start No Earlier Than/**



## Start No Later Than

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

### To enter a Constraint

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

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

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

### Using Deadlines

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

### To Create a Deadline

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

**Task Information**

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

Name: Task One Duration: 1d?  Estimated

Constrain task

Deadline: Mon 15/12/03

Constraint: NA

Task type: 8

Calendar: 22

WBS code: 29

Earned value method: % Complete

Mark task as milestone

Effort driven

Scheduling ignores resource calendars

Help OK Cancel

## 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:

**Task Information**

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

Name: Duration:  Estimated

Percent complete: Priority:

Dates

Start: Finish:

Hide task bar

Roll up Gantt bar to summary

Help OK Cancel

## Deleting Tasks

### Deleting Tasks

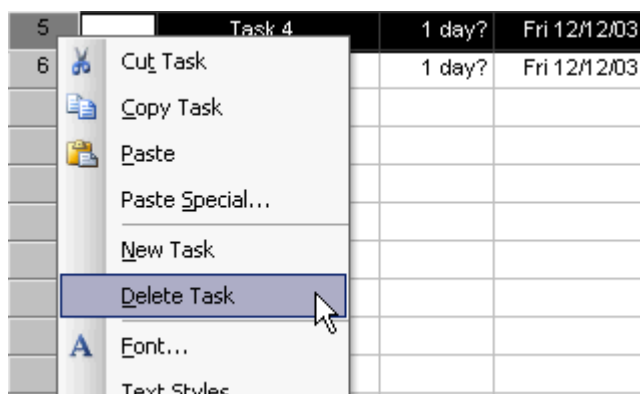
- Occasionally you will need to delete tasks either because they were entered in error or they are no longer relevant. There are several ways to do this.

#### To delete a Task

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

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

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



## Moving Tasks

### Moving Tasks

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

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

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

**OR** cut and paste the task to the desired location.

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

## Creating Dependencies

---

### Establishing Dependencies

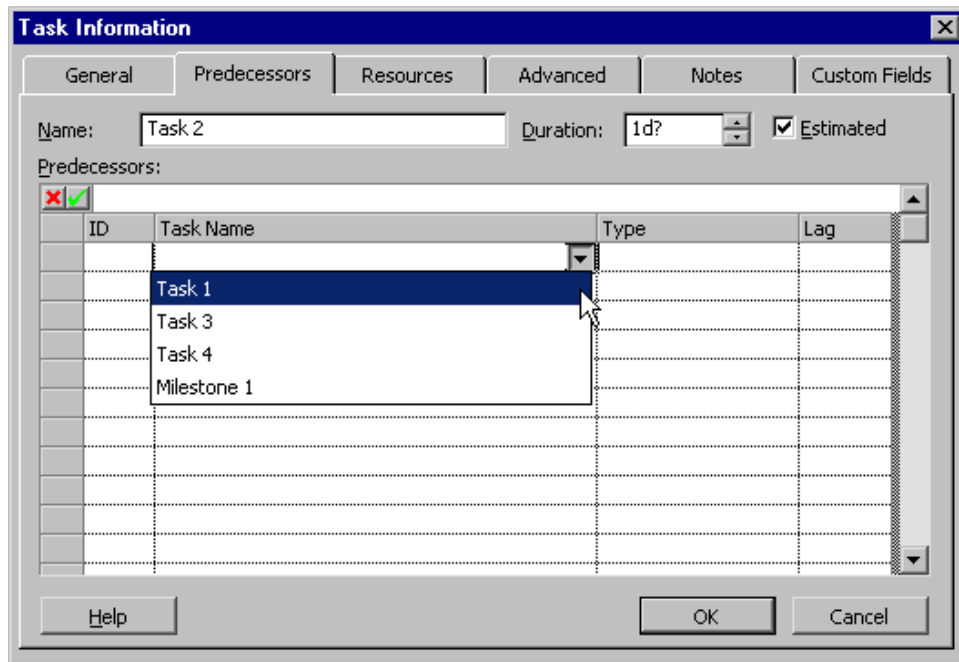
- Dependencies are a way to link tasks together in order to describe which tasks must precede or succeed one another - some tasks must start or finish before another task can begin or end. Creating dependencies allows Project to create a flexible time framework relative to the task preceding or succeeding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

### Using Finish-to-Start (FS) Dependencies

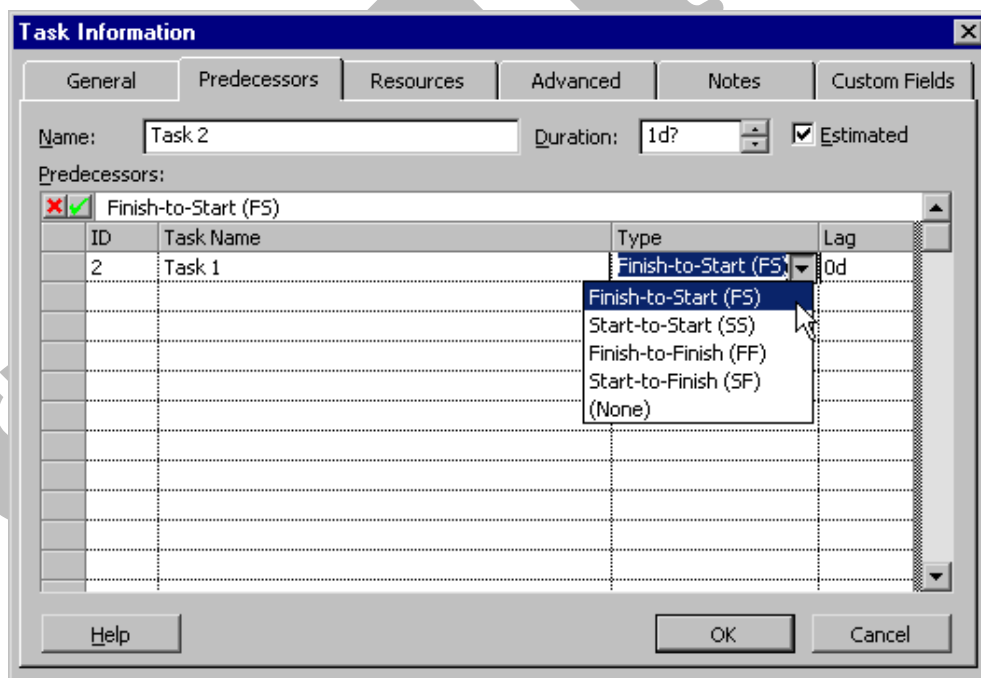
- The **finish-to-start** dependency is the most common type of relationship. The start of one task begins as soon as its predecessor finishes. The successor can't start until the predecessor finishes.

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

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



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




- Click **OK**

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

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

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

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

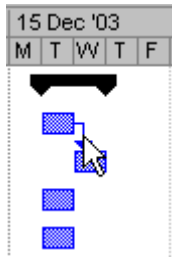
- Release the mouse and the link will be created
- OR** in the Gantt table view, highlight the tasks you want to link.
- From the main menu, choose **Edit > Link Tasks**
- OR** click on the **Link Tasks** icon  on the **Standard** toolbar
- OR** press the **Ctrl + F2** key combination.

## Using Start-to-Finish (SF) Dependencies

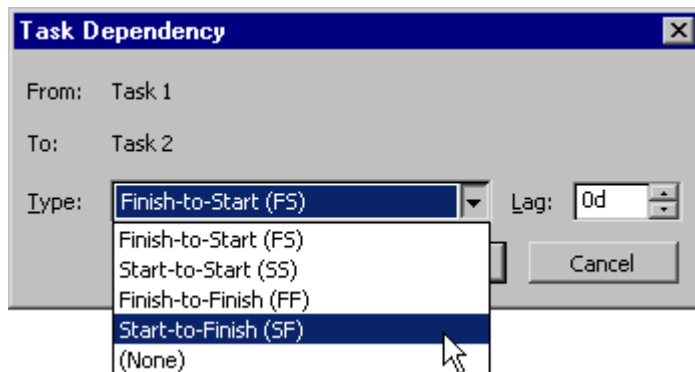
- In a **start-to-finish** dependency, the successor task is completed after its predecessor starts. In other words, the successor task cannot finish until the predecessor task starts. The start to finish relationship is rarely used, although it may be necessary in unusual instances.

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

- Use the **Predecessors** tab in the **Task Information** dialog box (as outlined in the previous section) to set this link
- OR** create a dependency using any one of the methods used to create a finish to start dependency (described in the previous section).
- Double-click on the arrow joining the tasks in the **Gantt Chart** view:



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



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

---

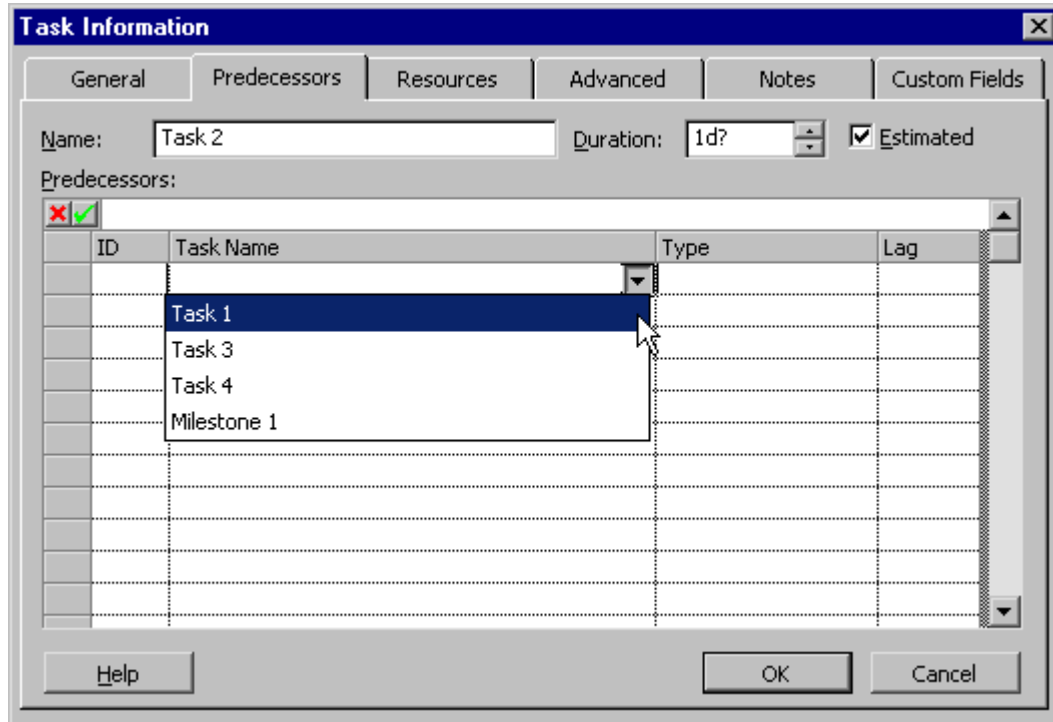
### Using Start-to-Start (SS) Dependencies

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

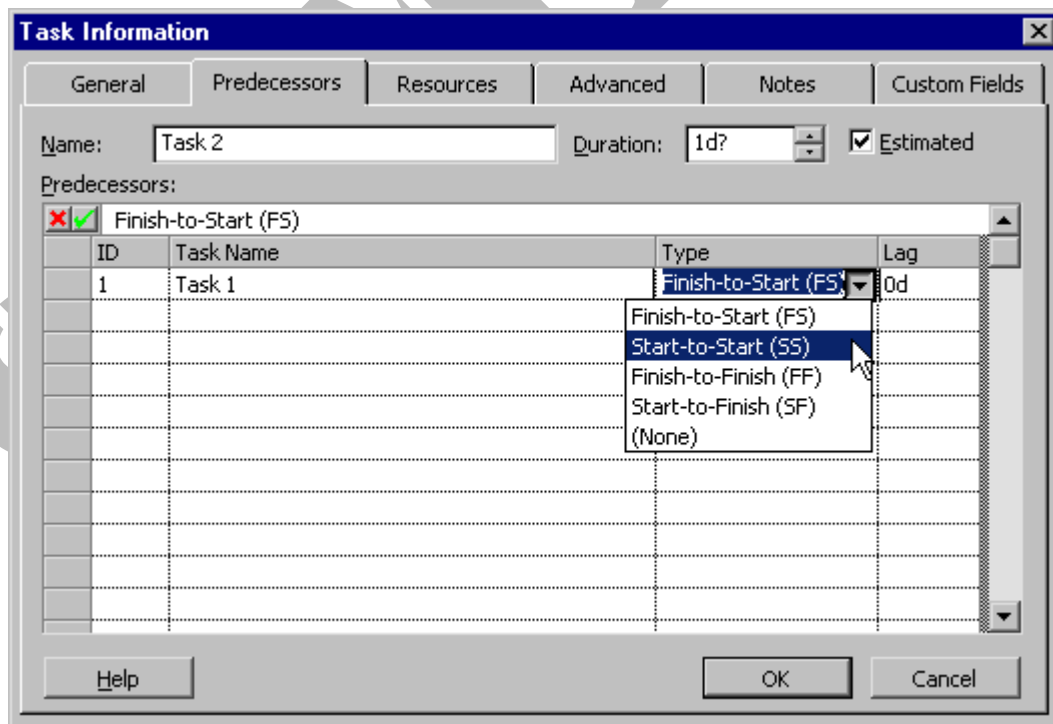
---

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

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



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



- Click **OK**

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



|   |  | Task Name        |  | 15 Dec '03  |   |   |   |   |   |  |
|---|--|------------------|--|-------------|---|---|---|---|---|--|
|   |  |                  |  | S           | M | T | W | T | F |  |
| 1 |  | [-] Summary Task |  | [Gantt bar] |   |   |   |   |   |  |
| 2 |  | Task 1           |  | [Gantt bar] |   |   |   |   |   |  |
| 3 |  | Task 2           |  | [Gantt bar] |   |   |   |   |   |  |
| 4 |  | Task 3           |  | [Gantt bar] |   |   |   |   |   |  |
| 5 |  | Task 4           |  | [Gantt bar] |   |   |   |   |   |  |

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

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

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

|  |  | Task Name   |  | 15 Dec '03  |   |   |   |   |  |  |
|--|--|-------------|--|-------------|---|---|---|---|--|--|
|  |  |             |  | M           | T | W | T | F |  |  |
|  |  | [Gantt bar] |  | [Gantt bar] |   |   |   |   |  |  |
|  |  | [Gantt bar] |  | [Gantt bar] |   |   |   |   |  |  |
|  |  | [Gantt bar] |  | [Gantt bar] |   |   |   |   |  |  |
|  |  | [Gantt bar] |  | [Gantt bar] |   |   |   |   |  |  |

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

**Task Dependency** [X]

From: Task 1

To: Task 2

Type: Start-to-Start (SS)

Finish-to-Start (FS)

**Start-to-Start (SS)**

Finish-to-Finish (FF)

Start-to-Finish (SF)

(None)

Lag: 0d

Cancel

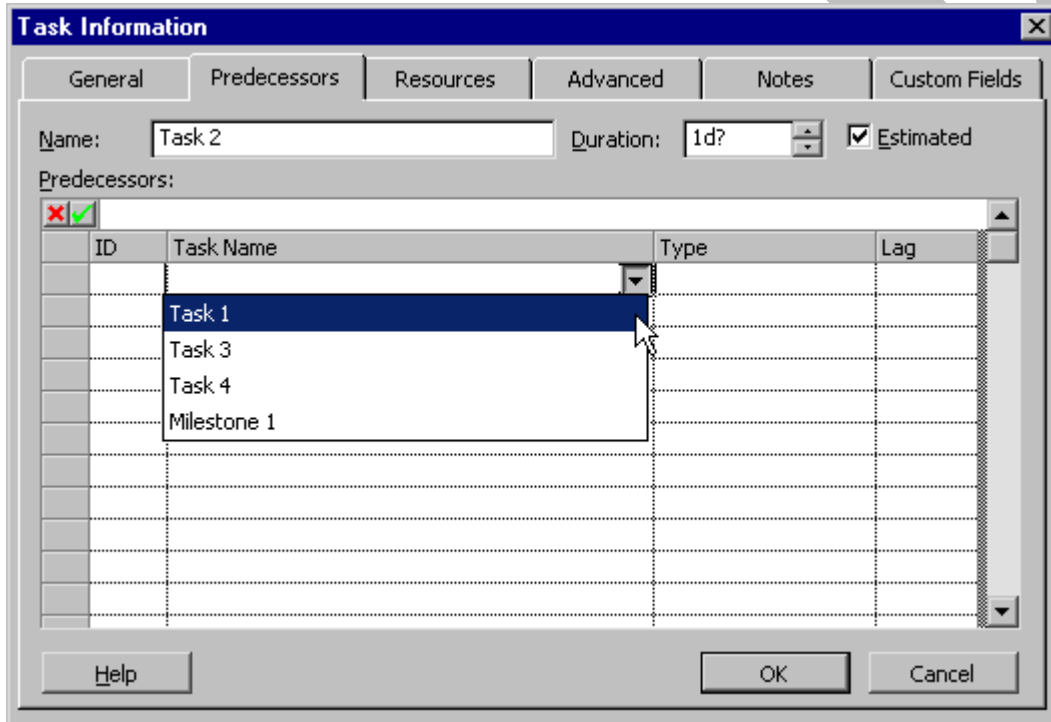
- Click **OK**.

## Using Finish-to-Finish (FF) Dependencies

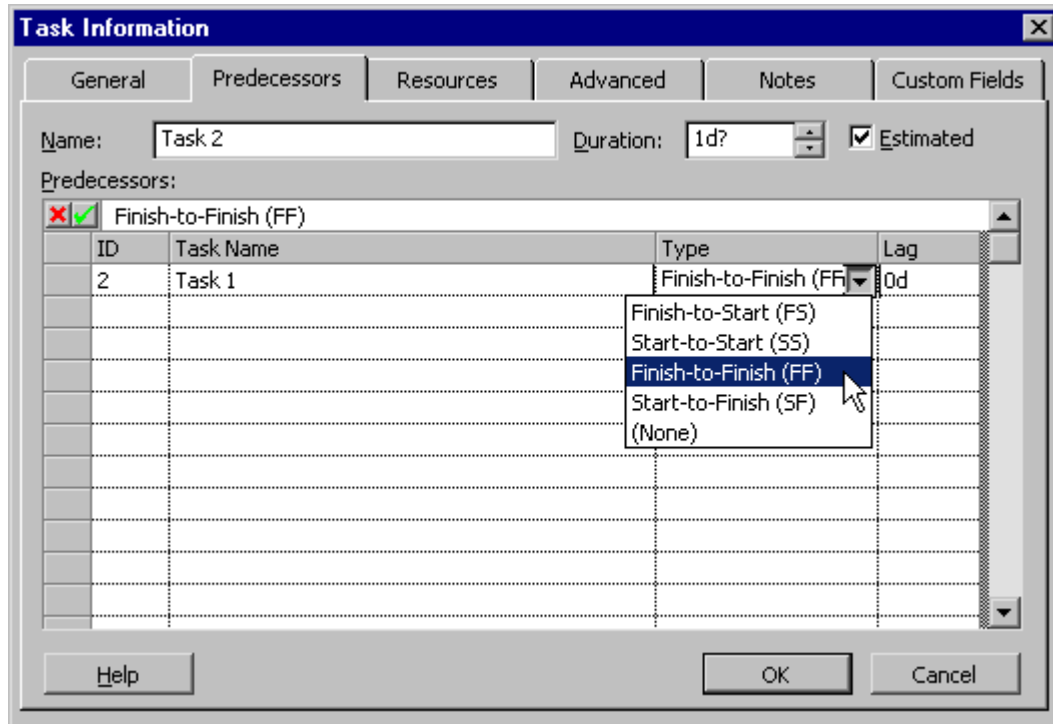
- In a finish-to-finish relationship, the successor can't finish until the predecessor finishes. The tasks can happen simultaneously, but the predecessor has to have finished in order for the successor to finish.

### To create a Finish-to-Finish (FF) dependency

- There are a few different ways to establish a **finish to finish** 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 **Finish-to-Finish** dependency from the drop-down menu of the **Type** column:



- Click **OK**

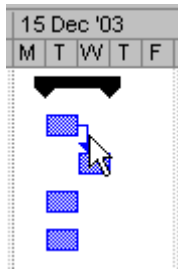
**OR** in the Gantt Chart view, hover your mouse pointer over the task you would like to make the predecessor until the cursor becomes four arrows pointing outward:

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

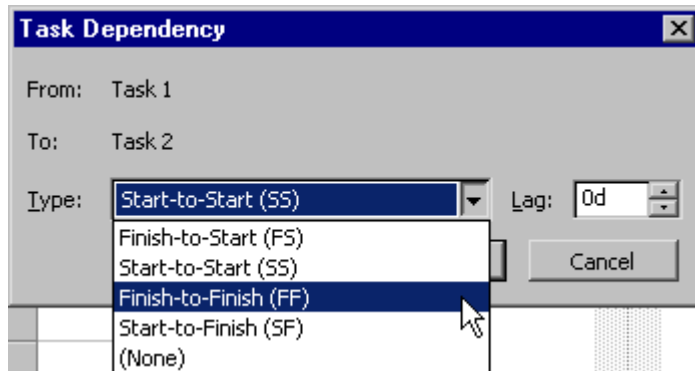
- Click and drag the mouse pointer to the task which you would like to make the successor. The cursor becomes a link symbol and an information box is displayed describing the link you are creating. By default, a **Finish-to-Start** dependency is created. This can be changed once the link has been made:

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

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



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



- Click **OK**.

## 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

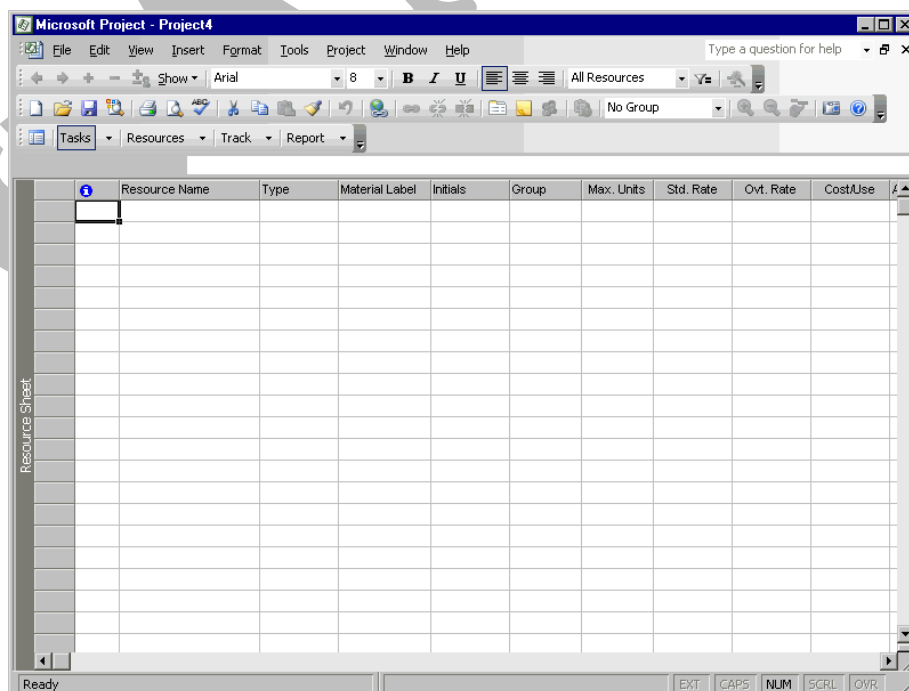
### Creating a Resource List

#### Creating Resources

- Resources are **people, supplies** and **equipment** which 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**:

|   |  | Resource Name | Type     |
|---|--|---------------|----------|
| 1 |  | Resource 1    | Work     |
|   |  |               | Work     |
|   |  |               | Material |

- If the resource is a material resource, enter a unit of measurement in the **Material Label** field. This could be minutes, litres, kilometres 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 customise 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 this 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 is appropriate. Project uses 100% as the default in this field:

| Group   | Max. Units | Std. Rate |
|---------|------------|-----------|
| Group 1 | 100%       |           |
| Group 1 | 100%       |           |

- 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:

| Units | Std. Rate | Ovt. Rate |
|-------|-----------|-----------|
| 10%   | 20.00/hr  |           |
|       | 0.00      |           |

- 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:

| Ovt. Rate | Cost/Use | Accrue At | Base C    |
|-----------|----------|-----------|-----------|
| 30.00/hr  | 0.00     | Start     | Standards |
|           |          | Start     |           |
| 0.00/hr   |          | Prorated  | Standards |
| 0.00/hr   | 500.00   | Prorated  | Standards |

- 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:

| Accrue At   | Base Calendar | Mat |
|-------------|---------------|-----|
| Start       | Standard      |     |
| Pr 24 Hours |               |     |
| Night Shift |               |     |
| Standard    |               |     |

- Enter a code in the **Code** field if you wish. Later on, it can help you to organise, sort or filter your information.

## Entering Working Time

### Entering Working Time

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

### To customise 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:

**Resource Information**

General Working Time Costs Notes Custom Fields

Resource Name:  Base calendar:

Set working time for selected date(s)

Legend:

- Working
- Nonworking
- Edited working hours

On this calendar:

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

Select Date(s):

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

Set selected date(s) to:

Use default  
 Nonworking time  
 Nondefault working time

From:  To:

Help Details... OK Cancel

- 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:



**Resource Information**

General Working Time Costs Notes Custom Fields

Resource Name: Resource 1

Cost rate tables

For rates, enter a value or a percentage increase or decrease from the previous rate. For instance, if a resource's Per Use Cost is reduced by 20%, type -20%.

| A (Default)    | B             | C             | D            | E |
|----------------|---------------|---------------|--------------|---|
| Effective Date | Standard Rate | Overtime Rate | Per Use Cost |   |
| --             | 20.00/h       | 30.00/h       | 0.00         |   |
|                |               |               |              |   |
|                |               |               |              |   |
|                |               |               |              |   |
|                |               |               |              |   |

Cost accrual: Prorated

Help Details... OK Cancel

## Entering Notes

### Entering Notes

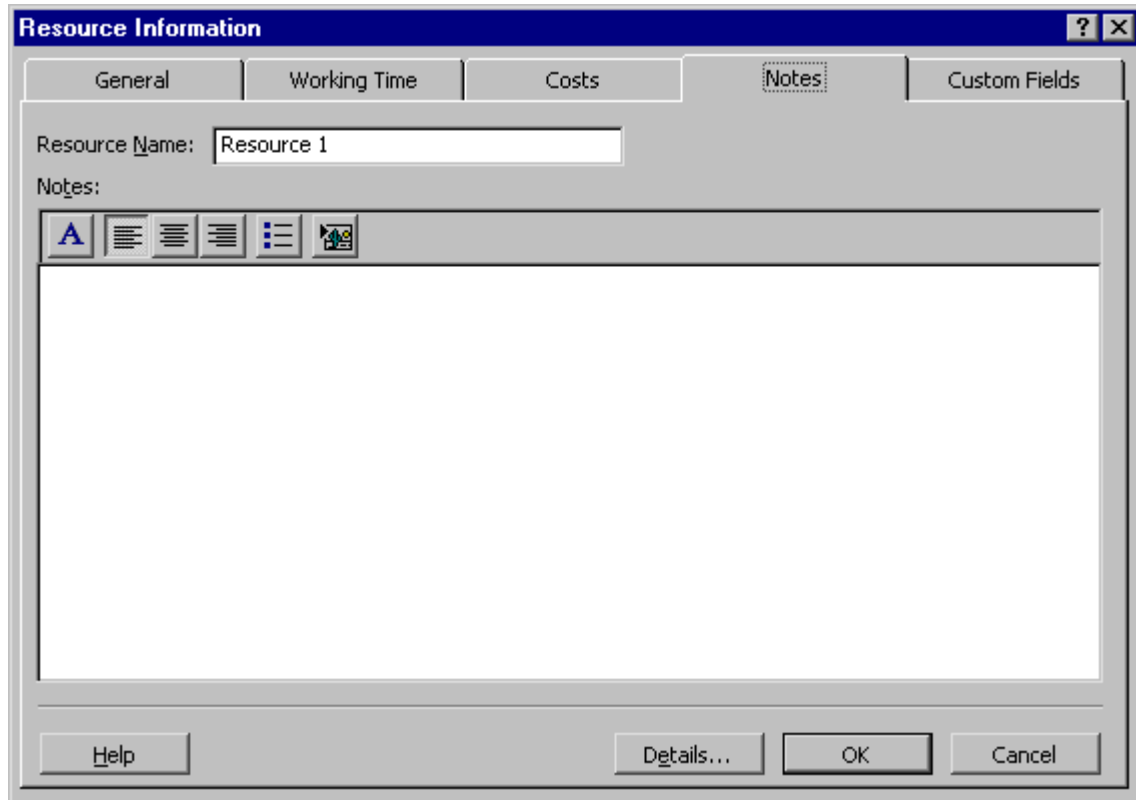
- You use resource notes in much the same way as task notes. They allow you to attach readily available, additional information to a resource.

### To enter a Resource Note



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

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

**OR** double-click on the resource 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.
- Notice the note symbol in the **Indicator** column of the **Resource Sheet** view. Hover your mouse cursor over it to display the note:

|   |  | Resource Name | Type | Material Label |
|---|---|---------------|------|----------------|
| 1 |  | Resource 1    | Work |                |
|   |   |               |      |                |
|   |   |               |      |                |

Notes: 'This is an example of a resource note.'

## Assigning Resources to a Task

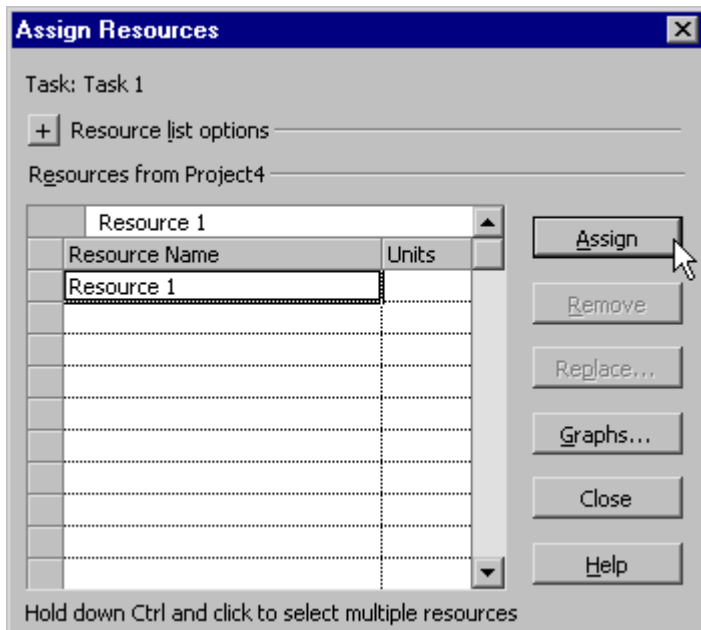
### Assigning with the Assign Resources Dialog Box

- In the **Gantt Chart** 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:

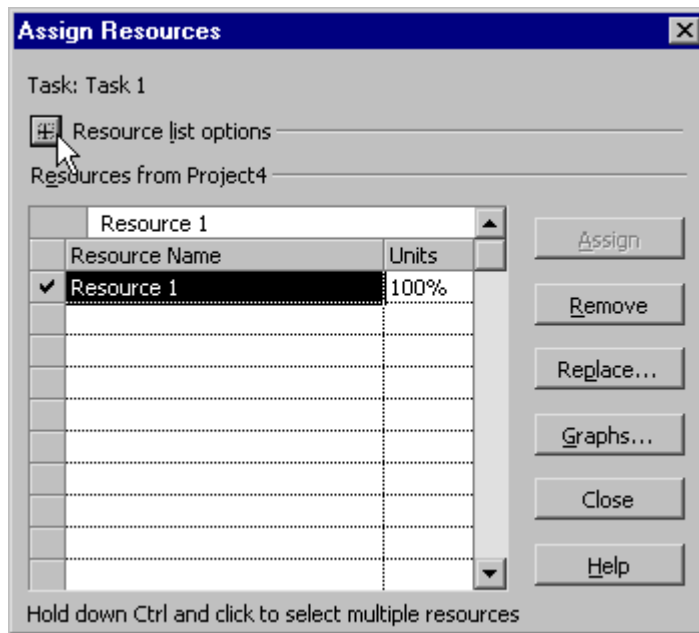
| Resource Name | Units |
|---------------|-------|
| ✓ Resource 1  | 100%  |

- Project automatically sets the **Units** to 100%, but you may assign any percentage of use to the resource.

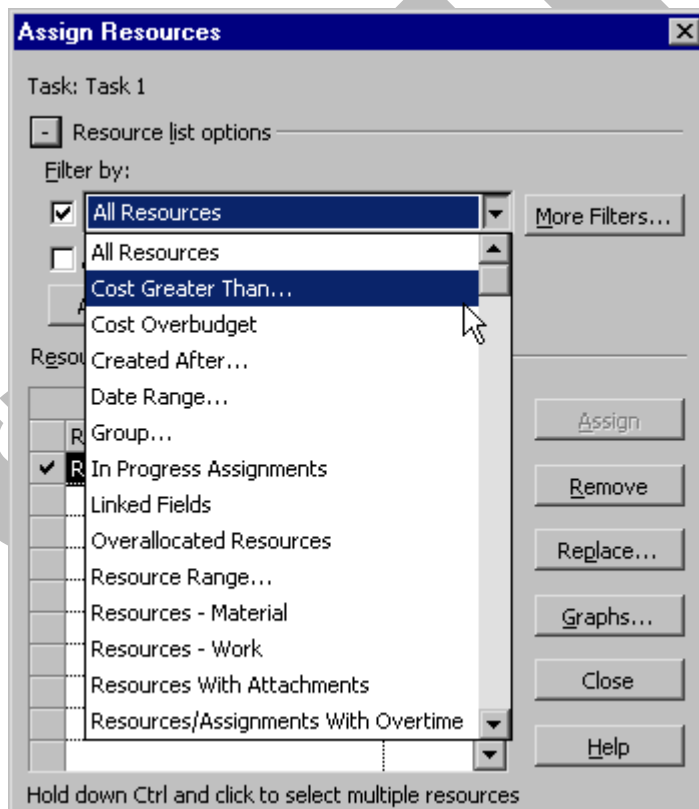
---

### Using the Resource List Options

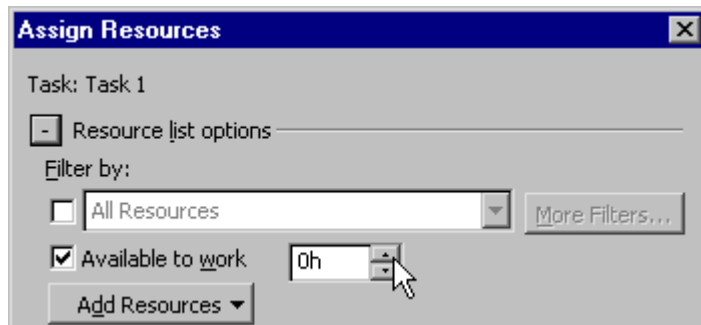
- There are several tools available to assist you in choosing which resource to assign to a certain task.
- In the **Assign Resources** dialog box, expand the **Resource list options** section by clicking on the plus sign button:



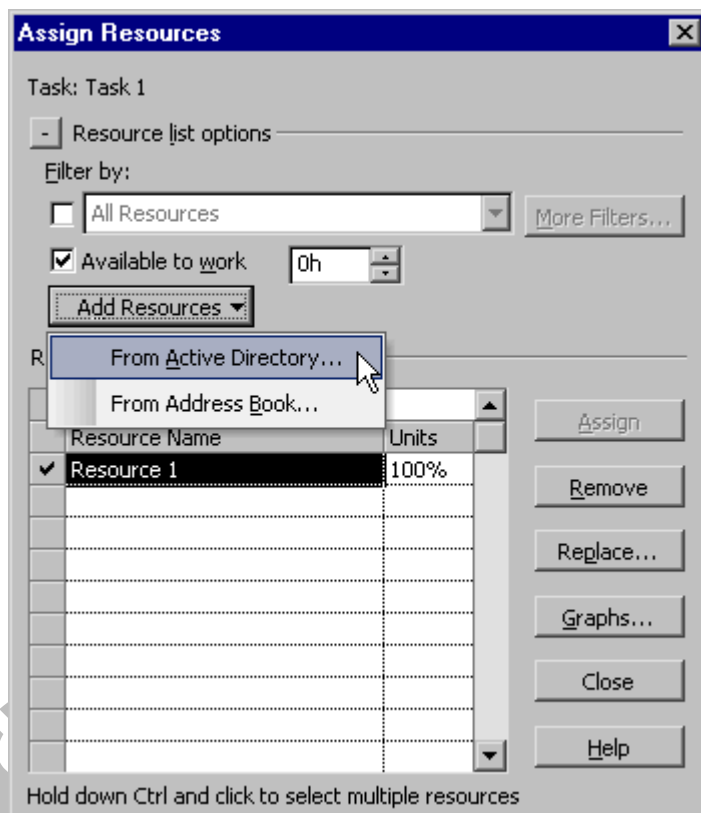
- This allows you to filter your resources to meet the criteria you specify.
- If you check the **Filter by** box, you can select a filter from a long list provided by Project, or create your own filter by clicking on **More Filters**:



- If you check the **Available to work** box, you can enter the number of hours you will need a resource. Project then searches and calculates remaining time for a resource. Resources which 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 either an **Active Directory** or an **Address Book**:



### 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 |
|--|----------------|---------------------|---------------------|--------------|----------------|
| <input type="checkbox"/> <b>Summary Task</b> | <b>4 days?</b> | <b>Fri 12/12/03</b> | <b>Wed 17/12/03</b> |              |                |
| Task 1                                       | 1 day?         | Tue 16/12/03        | Tue 16/12/03        |              | Resource 1     |
| Task 2                                       | 1 day?         | Wed 17/12/03        | Wed 17/12/03        |              | Resource 2     |
| Task 3                                       | 1 day?         | Fri 12/12/03        | Fri 12/12/03        |              |                |
| Task 4                                       | 1 day?         | Fri 12/12/03        | Fri 12/12/03        |              |                |
| Milestone 1                                  | 1 day?         | Fri 12/12/03        | Fri 12/12/03        |              |                |

## Review Questions

### How would you:

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

SAMPLE

## 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

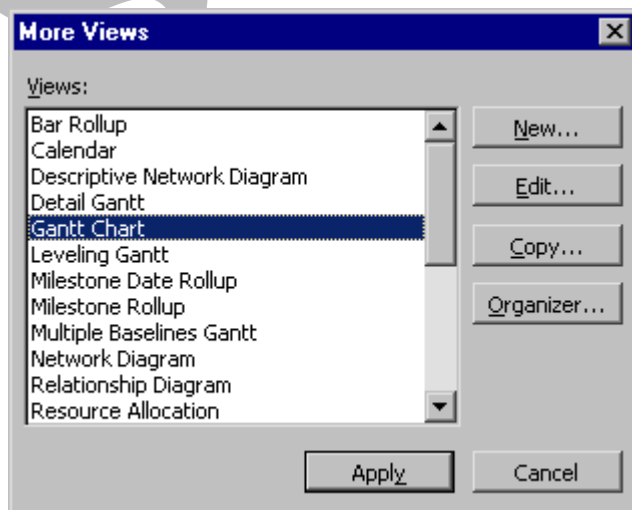
- Now that you are familiar with the basics of Project and know how to enter the components of a project, you must learn how to view the information. The different views in Project allow you to see the project from a variety of perspectives and focus on different aspects. This allows you to understand, visualise, and communicate 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 24 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, organise** and **apply** any view:



- A quick way to access the common views is using the **View Bar**. It is a toolbar which contains icons for eight of the most common 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

- 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:



The screenshot displays the Microsoft Project 2003 interface. The main window shows a Gantt Chart with a task list. The task list is as follows:

| ID | Task Name    | Duration | Start        | Finish       | Predecessors | Resource Names |
|----|--------------|----------|--------------|--------------|--------------|----------------|
| 1  | Summary Task | 4 days   | Fri 12/12/03 | Wed 17/12/03 |              |                |
| 2  | Task 1       | 1 day?   | Tue 16/12/03 | Tue 16/12/03 |              |                |
| 3  | Task 2       | 1 day?   | Wed 17/12/03 | Wed 17/12/03 |              |                |
| 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 |              |                |

The Task Form at the bottom shows the following details for the selected task:

- Name: Summary Task
- Duration: 4d?
- Effort driven:
- Start: Fri 12/12/03
- Finish: Wed 17/12/03
- Task type: Fixed Duration
- % Complete: 0%

The Task Form also contains two empty tables for resource and predecessor information:

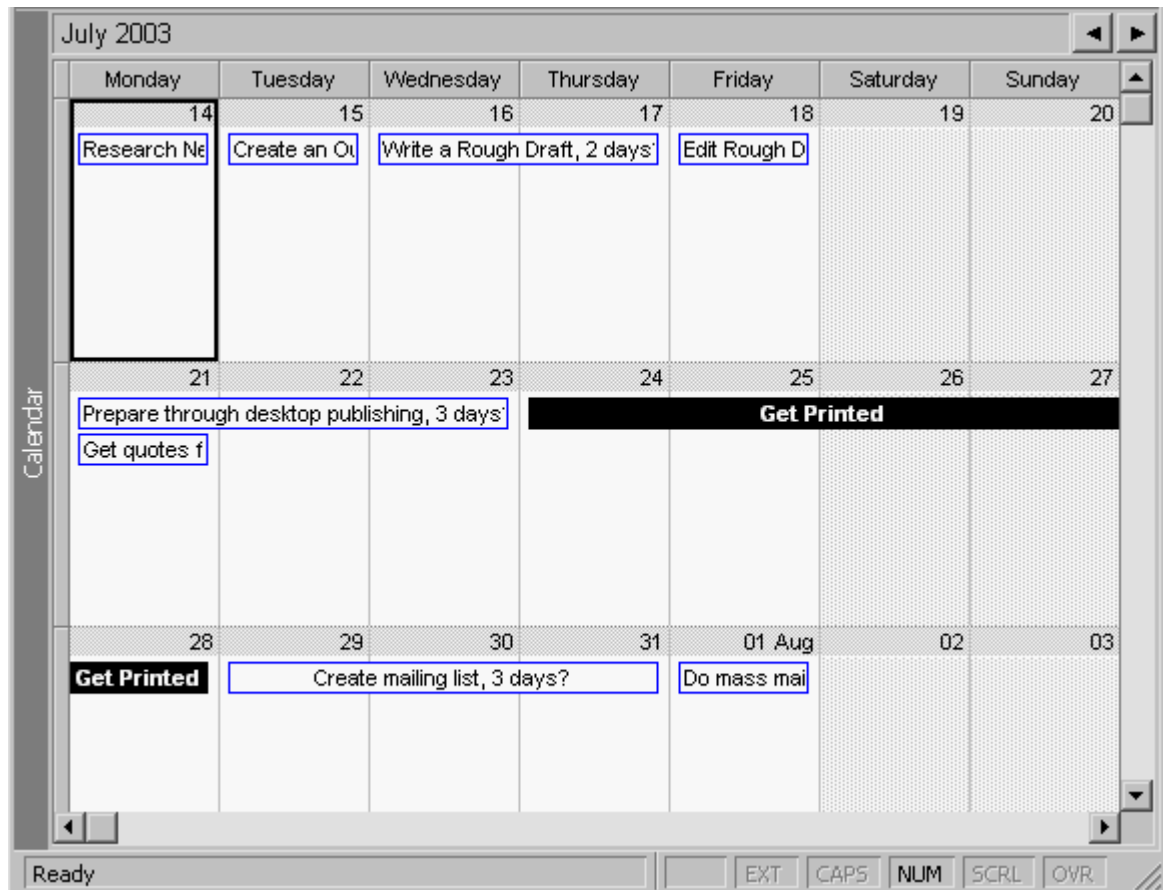
| ID | Resource Name | Units | Work |
|----|---------------|-------|------|
|    |               |       |      |
|    |               |       |      |
|    |               |       |      |

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

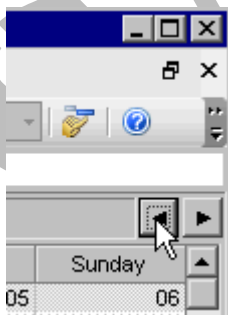
## Using the Calendar View

### 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:



- **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:

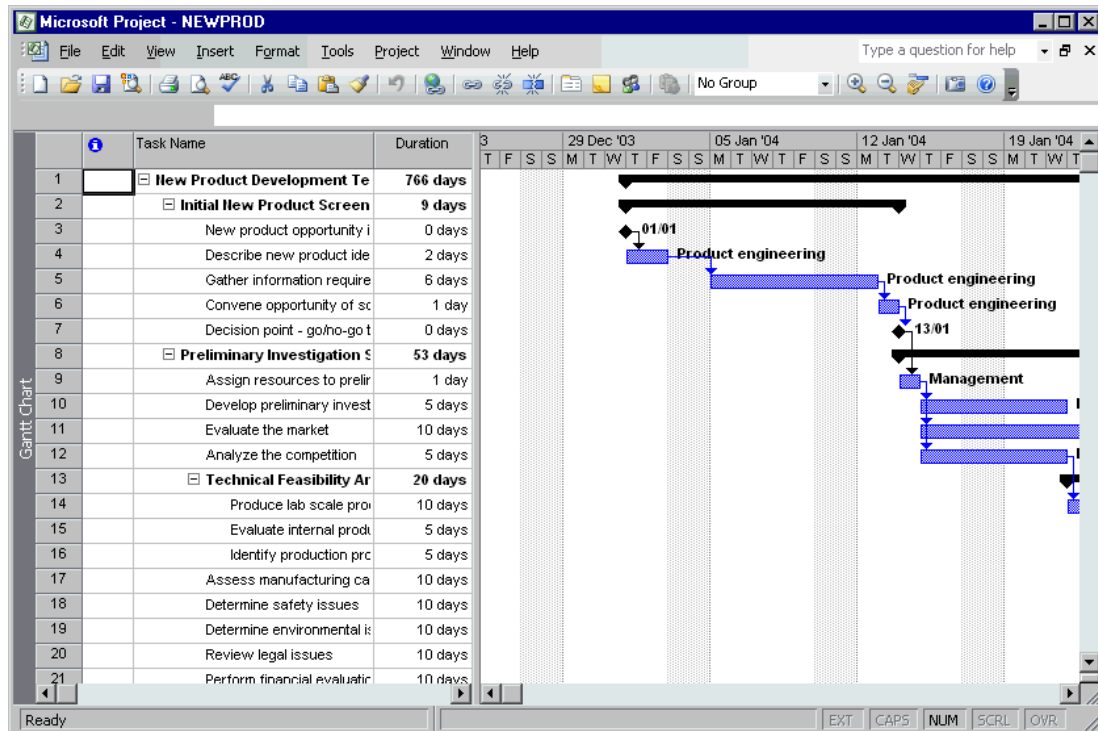


## Using the Gantt Chart View

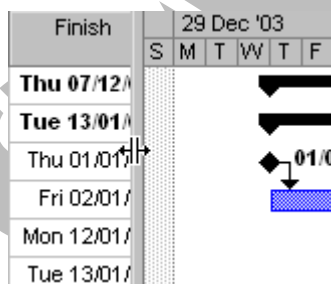
### Applying the Gantt Chart View

- The **Gantt Chart** view is useful for entering task information and viewing the timing and relationship between tasks.

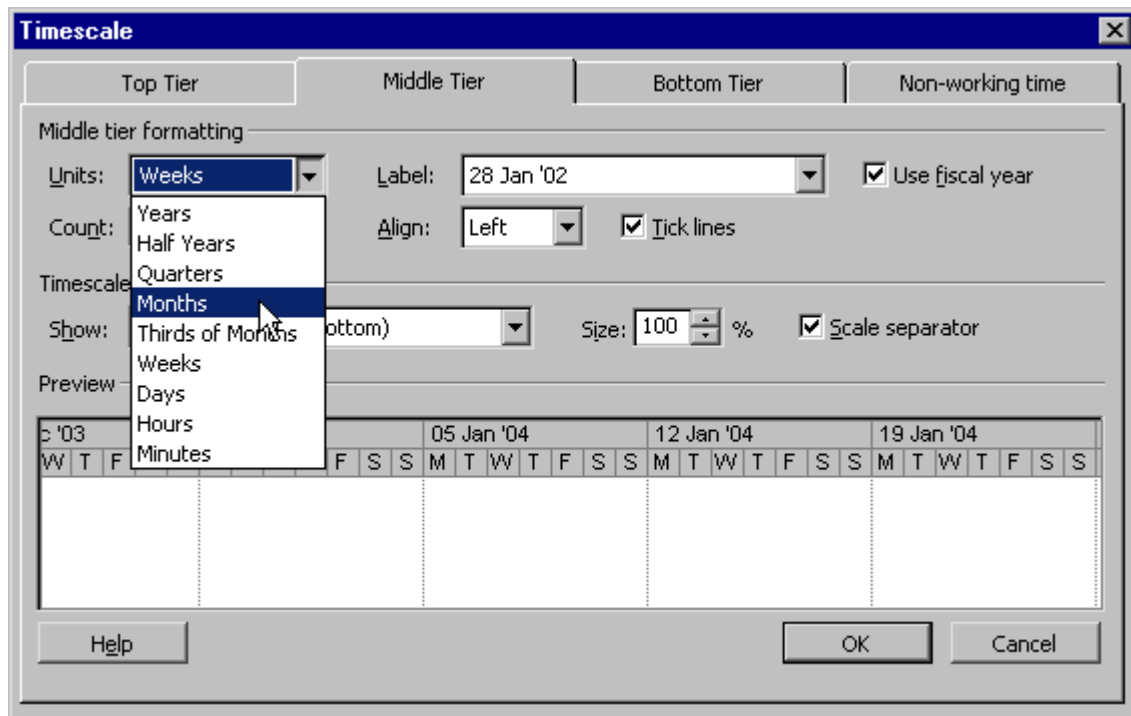
- The **Gantt Chart** View is the default view in Project. It consists of the **Gantt table** (on the left) and the **Gantt Chart** (on the right). The Gantt table is made up of columns of information, and the Gantt Chart is the graphic representation of the information entered:



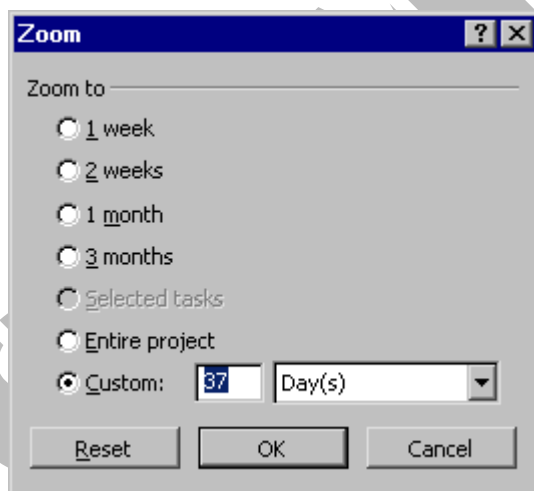
- The two windows can be resized so that you can view a larger or smaller portion of the window. To resize, simply hover your mouse cursor over the grey vertical divider until it becomes two lines with arrows pointing outward. Click and drag the line until it is in the position you desire:



- 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 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 also 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:



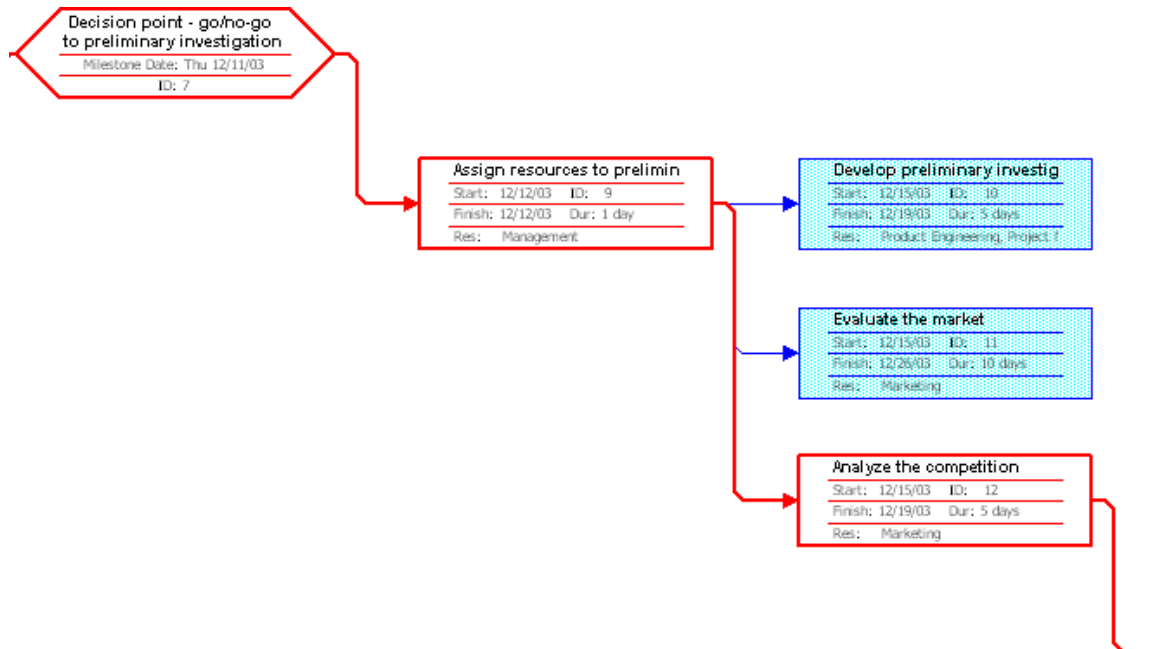
- Select an option from the list or use the **Custom** option to create your own.
- Click **OK**

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

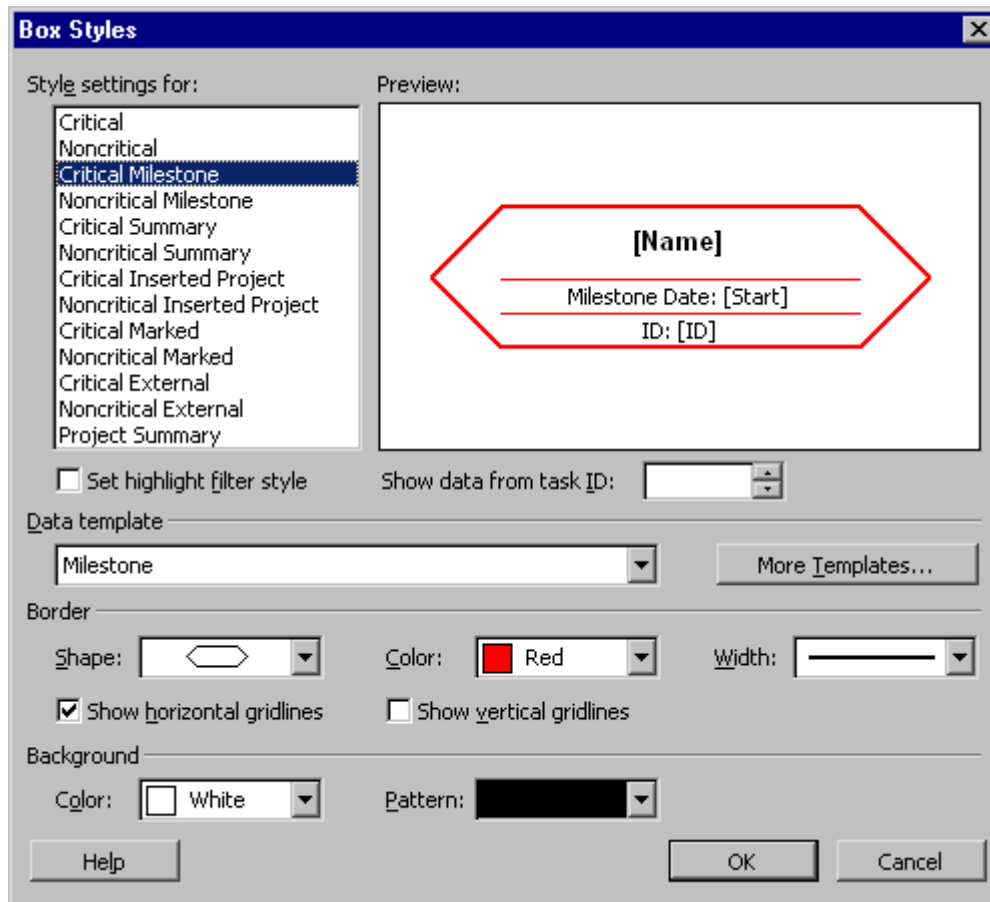
## Using the Network Diagram View

## Applying the Network Diagram View

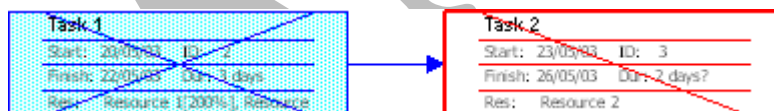
- The **Network Diagram** view is useful for analysing the general workflow and relationships between tasks. The **Network Diagram** view replaced the **PERT** chart in older versions of Project:



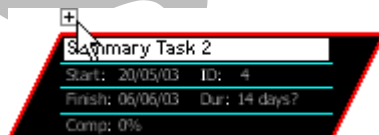
- It is a flowchart made up of **nodes**. Each **node** represents a task, and contains the **task name**, **duration**, **task ID**, **start date**, **finish date** and **resources** (if a resource has been assigned).
- Different shaped nodes represent different types of tasks. You can determine the 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:



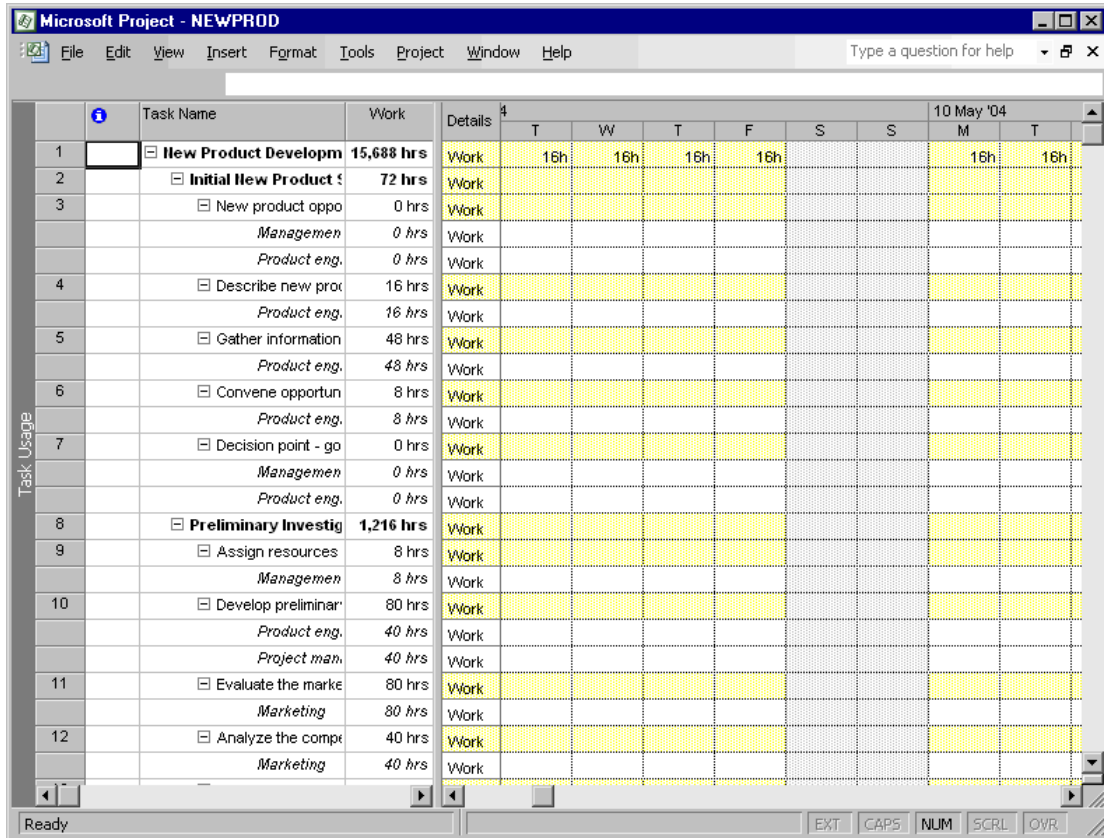
- You can show or hide details by clicking on the cross which appears on the upper left corner of a summary node:



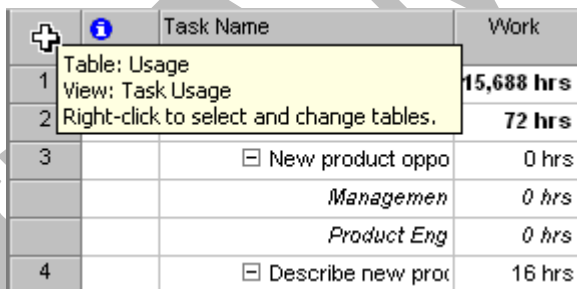
## Using the Task Usage View

### Applying the Task Usage View

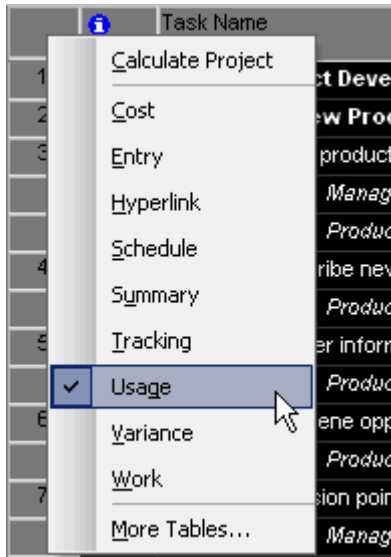
- The **Task Usage** view is useful for showing and organising assigned resources under each task. It is also used to set **resource work contours** (discussed later):



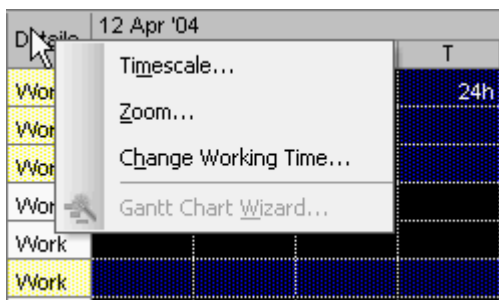
- By default, the **Task Usage** table is shown in the left pane. To choose a different table, click on the **select all button** at the top left corner of the table:



- 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:

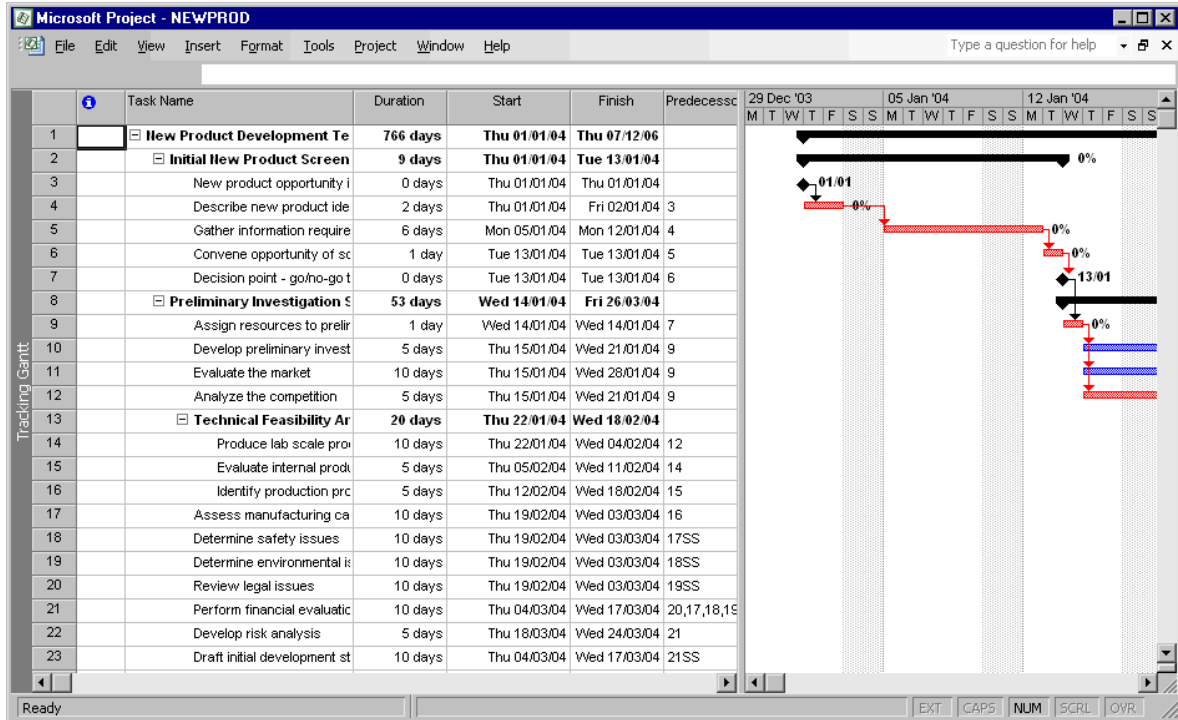


## Using the Tracking Gantt View

### 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 the Project 2003 Intermediate Level Training Manual). It shows a **task list** in the left pane and the **Tracking Gantt** chart in the right:



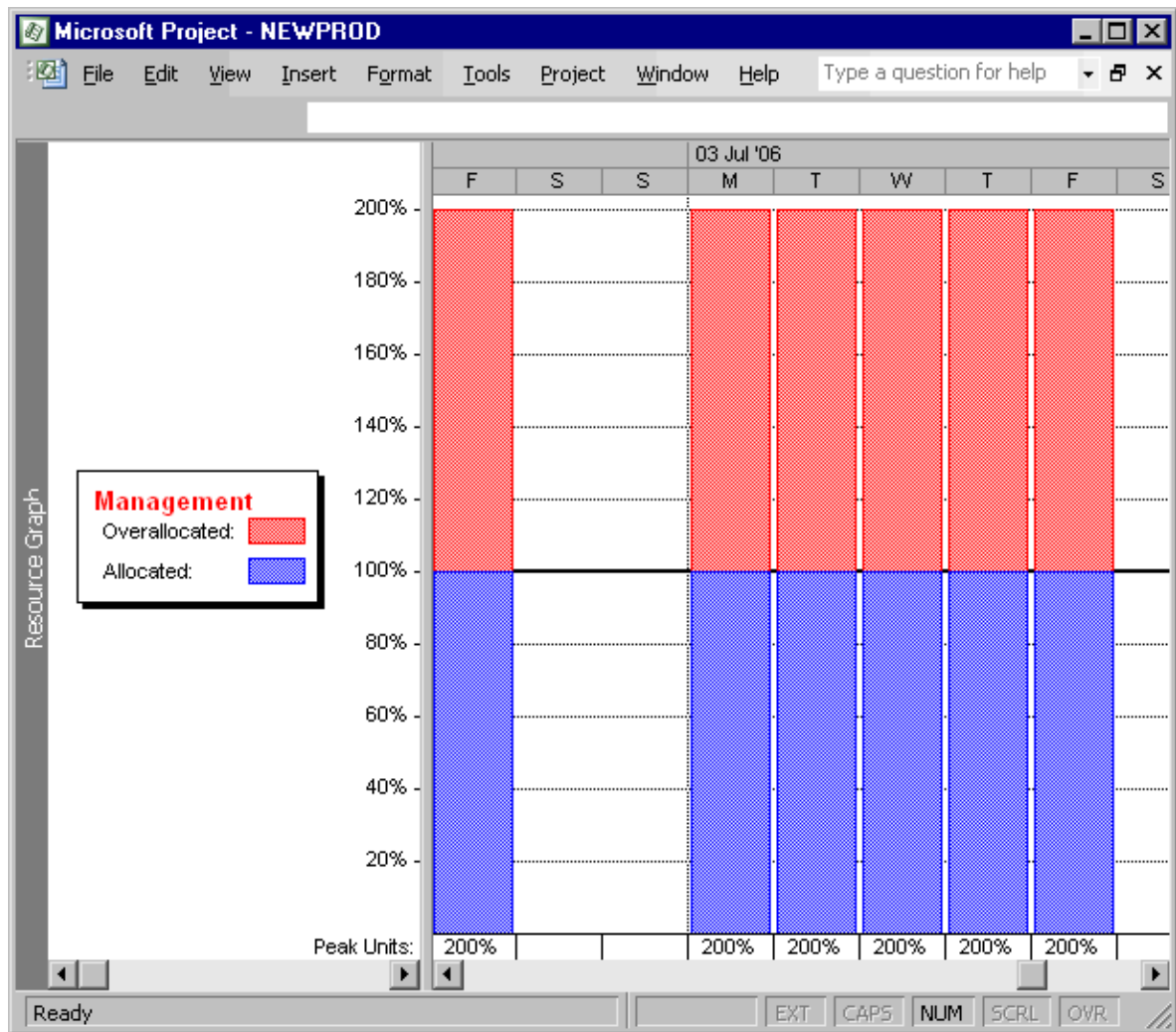


- A **black bar** in the Tracking Gantt view represents summary tasks. When a task is in progress, a striped bar appears below it, representing work done and the percentage of work done is displayed to the right of the bar.

## 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.

## Using the Resource Sheet View

### Applying the Resource Sheet View

- The **Resource Sheet** view is useful for **viewing**, **entering**, and **editing** resource information. It contains detailed resource information in a worksheet format:

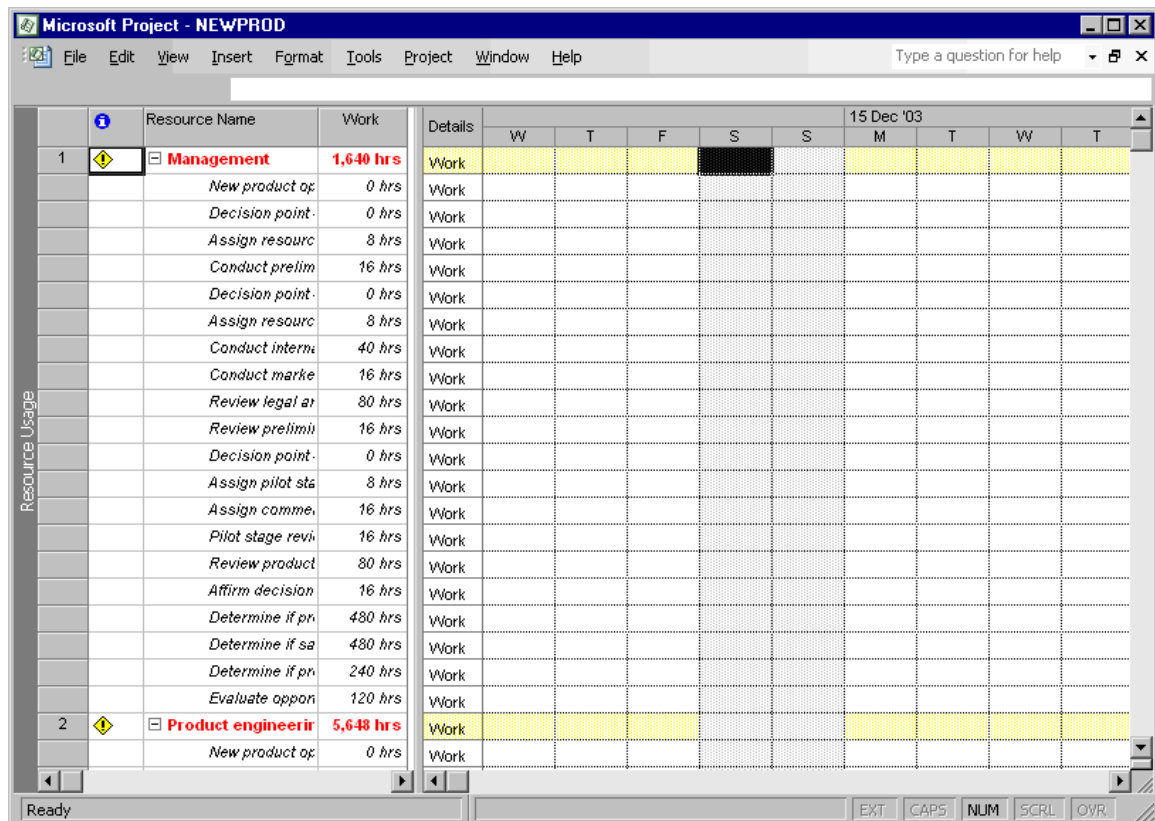
|    | Indicator    | Resource Name        | Type | Material Label | Initials | Group | Max. Units | Std. Rate | Ovt. Rate |
|----|--------------|----------------------|------|----------------|----------|-------|------------|-----------|-----------|
| 1  | Warning Flag | Management           | Work |                | M        |       | 100%       | 0.00/hr   | 0.00/     |
| 2  | Warning Flag | Product Engineerin   | Work |                | P        |       | 100%       | 0.00/hr   | 0.00/     |
| 3  | Warning Flag | Legal                | Work |                | L        |       | 100%       | 0.00/hr   | 0.00/     |
| 4  | Warning Flag | Marketing            | Work |                | M        |       | 100%       | 0.00/hr   | 0.00/     |
| 5  | Warning Flag | Project Manager      | Work |                | P        |       | 100%       | 0.00/hr   | 0.00/     |
| 6  |              | Process Engineer     | Work |                | P        |       | 100%       | 0.00/hr   | 0.00/     |
| 7  |              | Manufacturing Engine | Work |                | M        |       | 100%       | 0.00/hr   | 0.00/     |
| 8  |              | Safety               | Work |                | S        |       | 100%       | 0.00/hr   | 0.00/     |
| 9  |              | Accounting           | Work |                | A        |       | 100%       | 0.00/hr   | 0.00/     |
| 10 |              | Customer             | Work |                | C        |       | 100%       | 0.00/hr   | 0.00/     |
| 11 |              | Purchasing           | Work |                | P        |       | 100%       | 0.00/hr   | 0.00/     |

- This view can be very helpful in determining which group a resource belongs to, as groups are clearly shown.
- If an overallocation exists, a **warning flag** is displayed in the **Indicator** column. In addition, the resource appears in red.

## Using the Resource Usage View

### Applying the Resource Usage View

- The **Resource Usage** view is useful for seeing each resource and the tasks assigned to that resource:



- This view can be used for **entering** and **editing** resource information, or **assigning tasks**.
- To assign or reassign a task, drag and drop between resources.
- A **warning flag** appears in the **Indicator** column if an overallocation exists.

## Review Questions

How would you:

- 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?

## Printing Reports

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


- Use print preview
- Use page setup
- Use the print dialog box
- Start the report generator
- Use the different types of reports
- Use the Project Guide for Printing wizard
- Customise reports

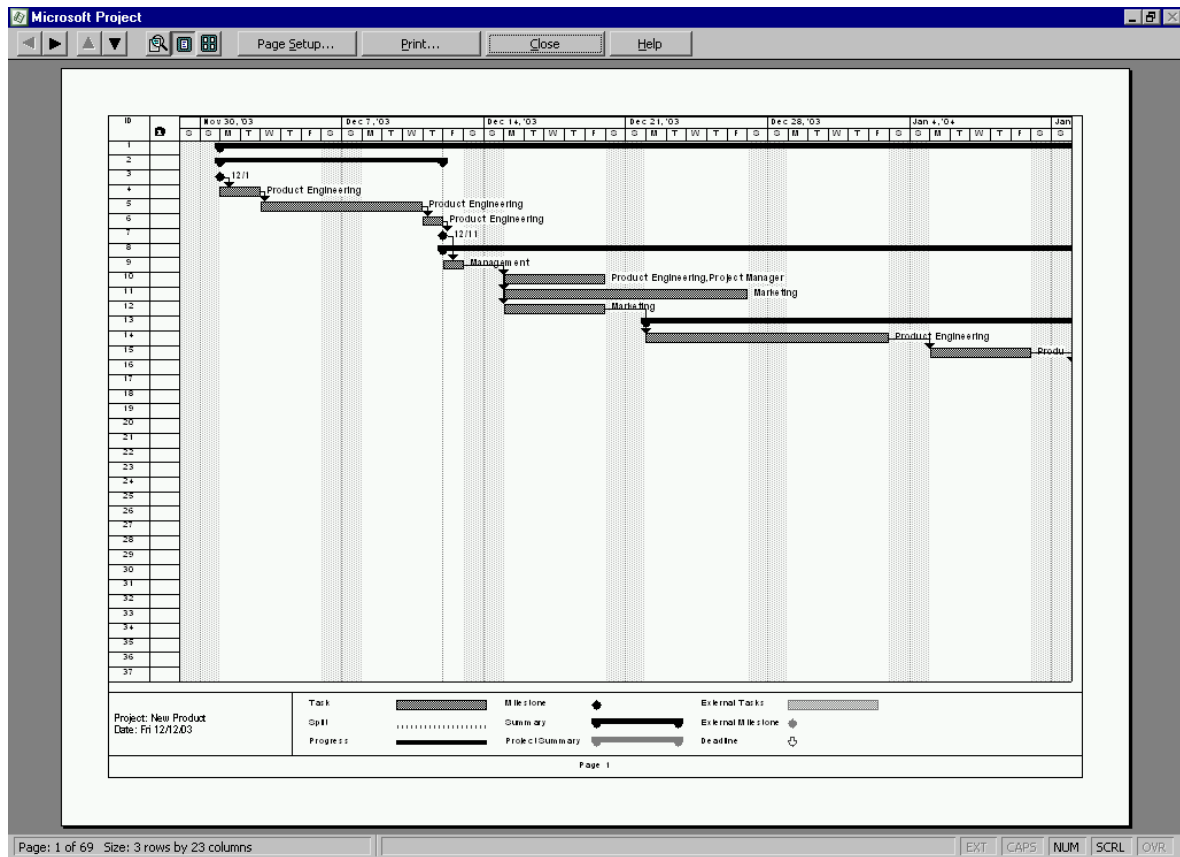
## Viewing and Printing Reports

- To keep others informed of your project, it is sometimes necessary to **print views or reports**.
- Views and reports are designed to show different information and highlight different aspects of the project. For example, management would require different information than stakeholders or accountants, etc. Not all information is relevant to everyone, so it is important to be able to present the appropriate data to the right people.
- Reports can also display information in a format which is more familiar to the person who is viewing it.

## Using Print Preview

### Understanding Print Preview

- **Print Preview** shows the document exactly as it will appear when printed.
- To display the print preview window, click on **Print Preview** icon  on the **Standard** toolbar  
**OR** from the main menu, choose **File > Print Preview**.
- This is an example of a **Gantt Chart** in **print preview**:



- A **toolbar** is available to navigate in **Print Preview** mode:



**Scroll arrows** - displays the previous page, next page or page above or below the currently displayed page.



**Zoom Button** - displays an enlarged view of the portion of the current page.



**Full page button** - displays one full page.



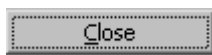
**Multiple pages button** - displays all the pages of the current view.



**Page Setup** - opens the Page Setup dialog box.



**Print** - opens the Print dialog box.



**Close** - closes the Print Preview mode.

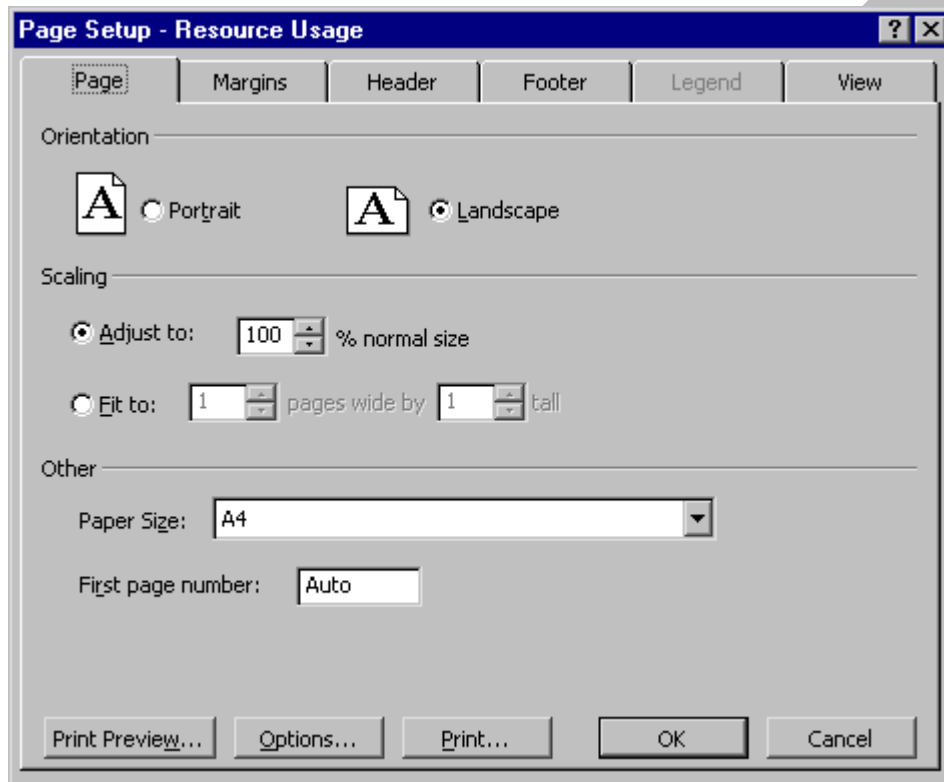


**Help** - opens Project Help.

## Understanding Page Setup

### Using Page Setup


- The **Page Setup** dialog box allows you to customise your document to your specifications and/or needs.
- To display the **Page Setup** dialog box, from the main menu, select **File > Page Setup**:



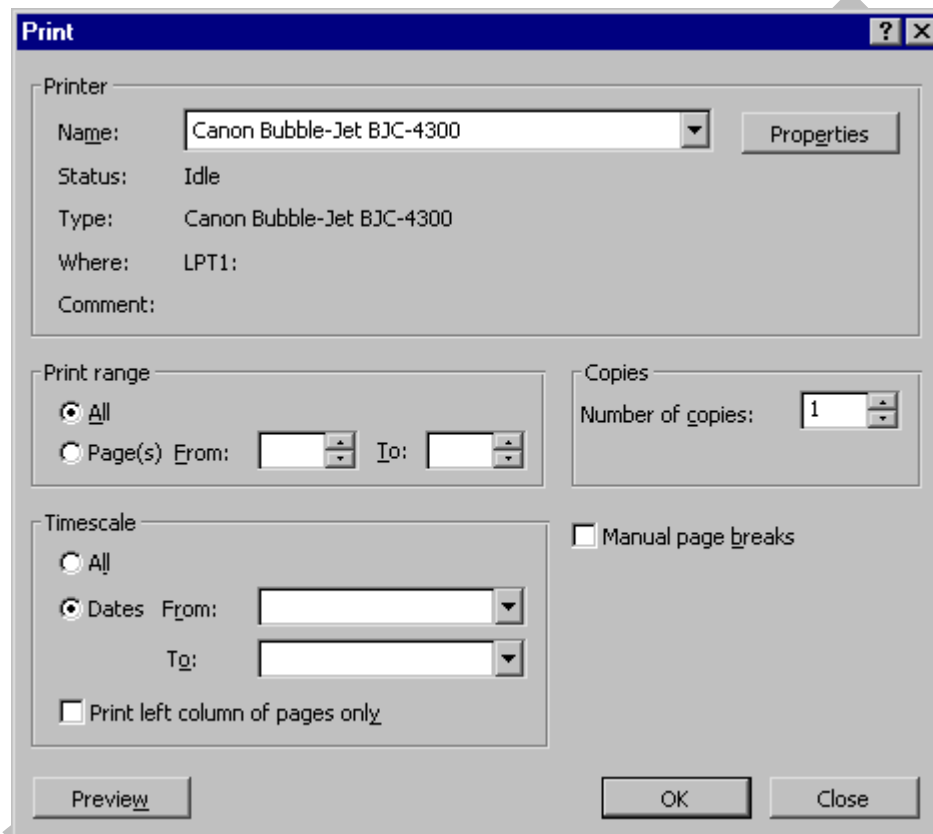
- The **Page** tab allows you to select orientation, scaling, paper size, and page numbering.
- The **Margins** tab allows you to set the margins and border options.
- The **Header** tab allows you to insert and edit headers.
- The **Footer** tab allows you to insert and edit footers.
- The **Legend** tab allows you to choose options for the legend which appears on the report when printed.
- The **View** tab allows you to choose various options regarding printing.
- The **Page Setup** dialog box also gives you access to **Print Preview**, **Options** (printer options) and the **Print** dialog box.

## Understanding the Print Dialog Box

## Using the Print Dialog Box

- To print, click on **Print** icon  on the **Standard** toolbar
- OR** from the main menu, choose **File > Print**
- OR** press the **Ctrl + P** key combination.

This opens the **Print** dialog box:



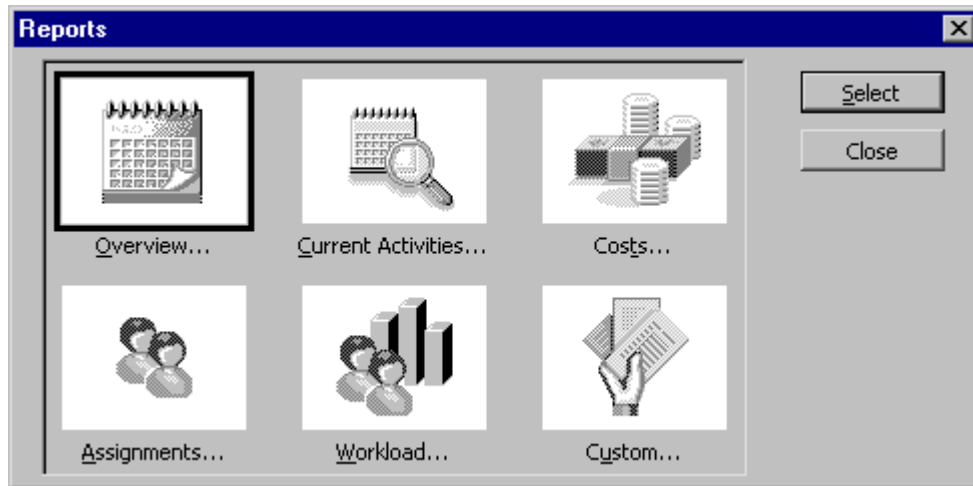
- The **Printer** section of the dialog box allows you to choose which printer you would like to use from a drop-down menu, and displays basic information regarding the printer you choose.
- The **Print** range allows you to select which pages you would like to print.
- The **Copies** section allows you to choose how many copies you would like to print.
- The **Timescale** section allows you to select the dates you would like to include in the report.
- The **Print** dialog box also gives you quick access to the **Print Preview** window.

## Starting the Reports Dialog Box



## Understanding the Reports Dialog Box

- The **Reports** dialog box is the launching point for all reports. It gives you access to the six main categories of reports: **Overview**, **Current Activities**, **Costs**, **Assignments**, **Workload** and **Custom**:



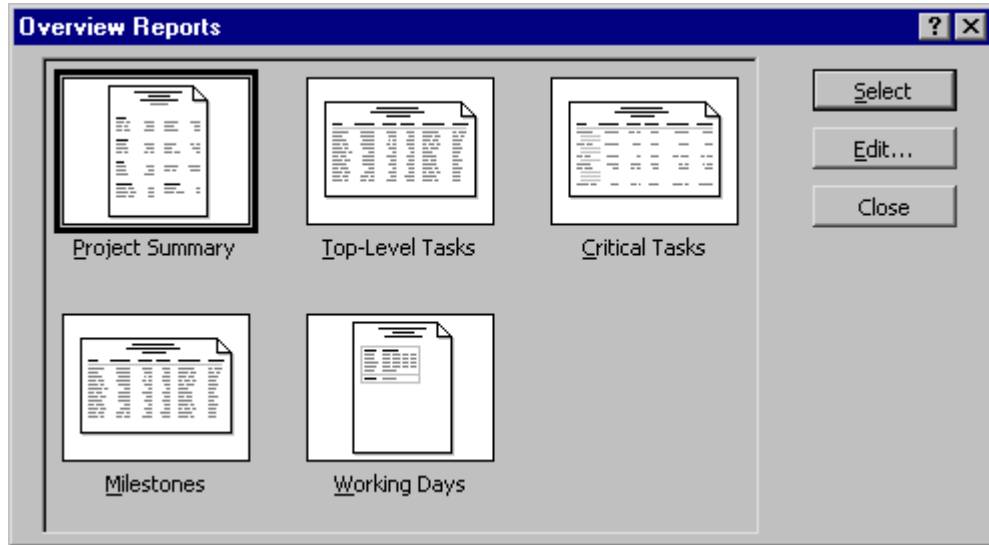
- To open the **Reports** dialog box, from the main menu, choose **View > Reports**.
- To select one of the different types of reports, click on the **name of the report category** and then click **Select**

*OR* double-click on it.

## Understanding the Different Types of Reports

### Using Overview Reports

- To display the **Overview Reports** dialog box, from the main menu, select **View > Reports**.
- There are five types of Overview Reports: **Project Summary**, **Top-Level Tasks**, **Critical Tasks**, **Milestones** and **Working Days**:

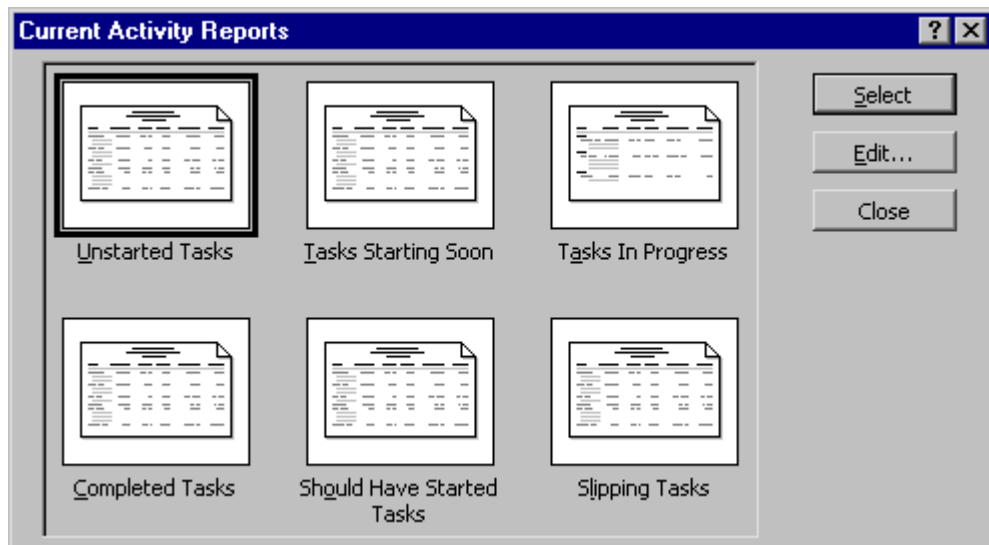


- **Project Summary** shows top-level information about the entire project including dates, duration, work, costs, task status, and resource status.
- **Top-Level Tasks** shows the summary tasks at the highest level as of the current date.
- **Critical Tasks** shows the status of the tasks on the critical path and the task's duration, start and finish dates, assigned resources, and predecessors and successors.
- **Milestones** shows the duration, start and finish dates, predecessor and successors, and assigned resources for each milestone.
- **Working Days** shows the base calendar information along with exceptions to the calendar.

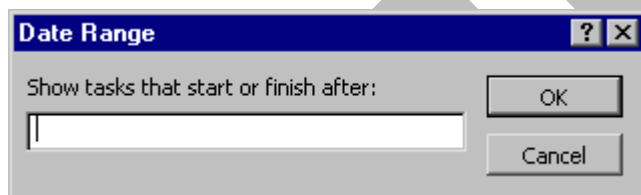
---

### Using Current Activity Reports

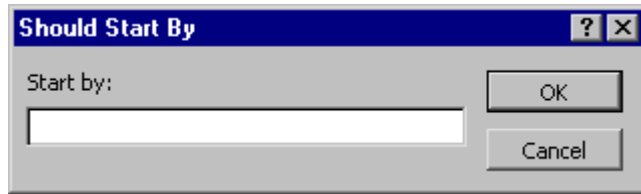
- There are six Current Activity Reports: **Unstarted Tasks**, **Tasks Starting Soon**, **Tasks In Progress**, **Completed Tasks**, **Should Have Started Tasks** and **Slipping Tasks**:



- **Unstarted Tasks** shows tasks which have not yet been started, or tasks sorted by their planned start date. It also shows duration, predecessor, and resource information.
- **Tasks Starting Soon** shows tasks which start within the dates which you enter in the **Date Range** dialog boxes. Specify the earlier date in the first box, click **OK**, and the later date in the second, and click **OK** again:



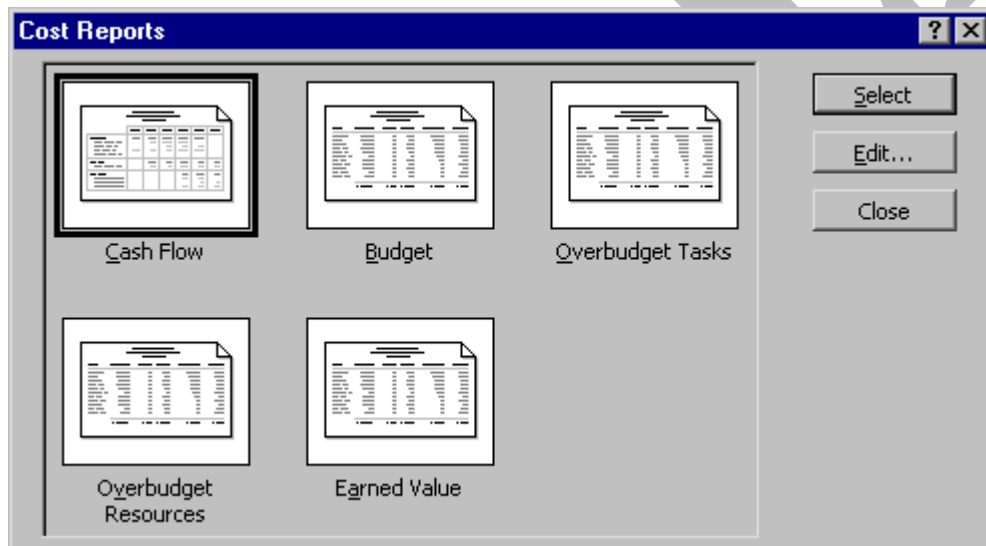
- **Tasks in Progress** shows tasks which have been started, but are not yet finished. It also shows duration, start and planned finish dates, predecessors, and resource information.
- **Completed Tasks** shows all finished tasks, and includes the actual start and finish dates, percent complete, cost, and work hours.
- **Should Have Started Tasks** shows all tasks which should have started by the date you enter in the **Should Start By** dialog box. The date you enter determines which tasks are shown in the report. It also includes planned start and finish dates, baseline start and finish dates, and variances for start and finish dates:



- **Slipping Tasks** shows tasks which have started behind schedule or have been rescheduled from the baseline start dates. It also includes planned start and finish dates, baseline start and finish dates, and variances for start and finish dates.

## Using Cost Reports

- There are five Cost Reports: **Cash Flow**, **Budget**, **Overbudget Tasks**, **Overbudget Resources** and **Earned Value**:



- **Cash Flow** shows costs, sorted by task, in weekly time increments.
- **Budget** lists tasks and the budgeted costs. It also includes baseline cost, variance, and actual costs.
- **Overbudget Tasks** shows tasks which are overbudget. It also includes cost, baseline, variance, actual cost, and remaining cost.
- **Overbudget Resources** shows resources which will be overbudget according to baseline estimates and the current progress of the project.
- **Earned Value** shows the status of the cost of each task when compared to the actual costs. The following table explains the column headings of this report:

**BCWS** - Budgeted Cost of Work Scheduled

**BCWP** - Budgeted Cost of Work Performed

**ACWP** - Actual Cost of Work Performed

**SV** - Schedule Variance

**CV** - Cost Variance

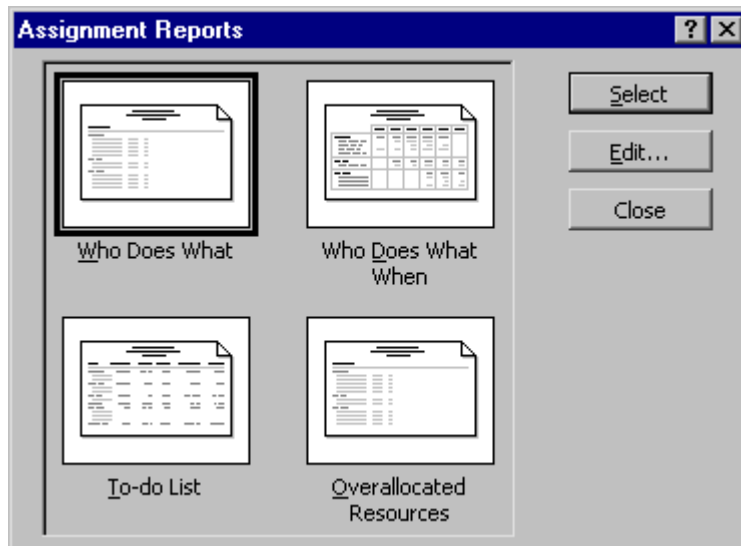
**BAC** - Budgeted at Completion

**EAC** - Estimate at Completion

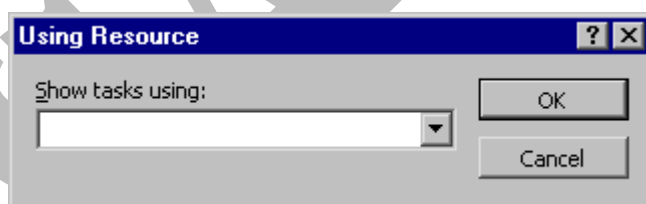
**VAC** - Variance at Completion

## Using Assignments Reports

- There are four Assignments Reports: **Who Does What**, **Who Does What When**, **To-do List**, and **Overallocated Resources**:



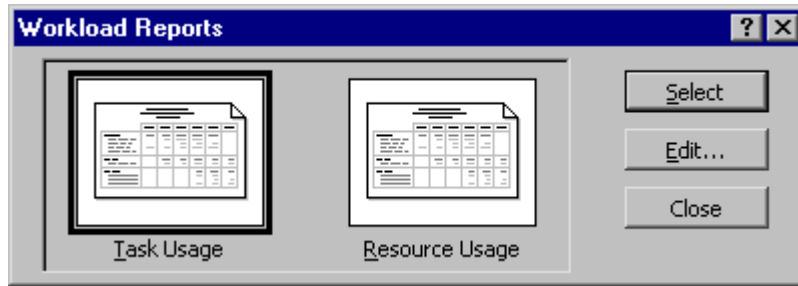
- Who Does What** shows resources and their assigned tasks, the amount of work planned for each task, planned start and finish dates, and resource notes.
- Who Does What When** shows daily work scheduled for each resource on each task.
- To-do List** shows tasks assigned to the resource which you specify in the Using Resource dialog box. Tasks are listed on a weekly basis:



- Overallocated Resources** shows resources which are overallocated, their tasks, and the total hours of work assigned to them. It also shows task details.

## Using Workload Reports

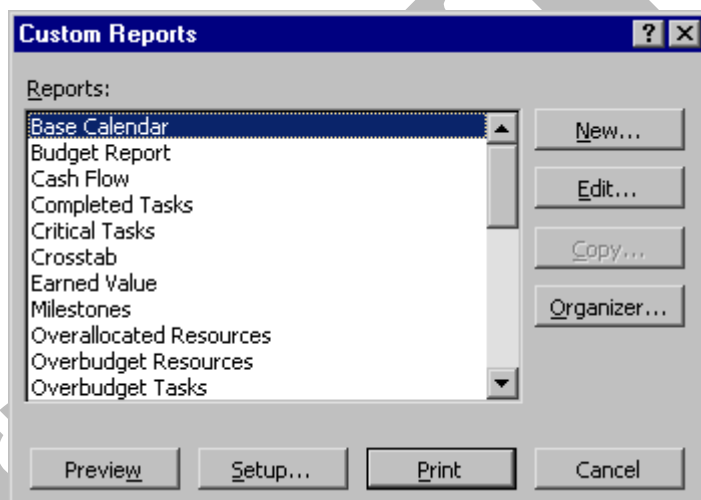
- There are two Workload Reports: **Task Usage** and **Resource Usage**:



- **Task Usage** shows tasks, resources assigned to each task, and the amount of work assigned to each resource. Information is shown in weekly increments.
- **Resource Usage** shows resources and tasks assigned to them, as well as the amount of work assigned to them. Information is shown in weekly increments.

### Using Custom Reports

- There are three **custom** reports listed among the standard reports in the **Custom Reports** dialog box: **Crosstab**, **Resource** and **Task**. You can only access these three reports from the **Custom Reports** dialog box:

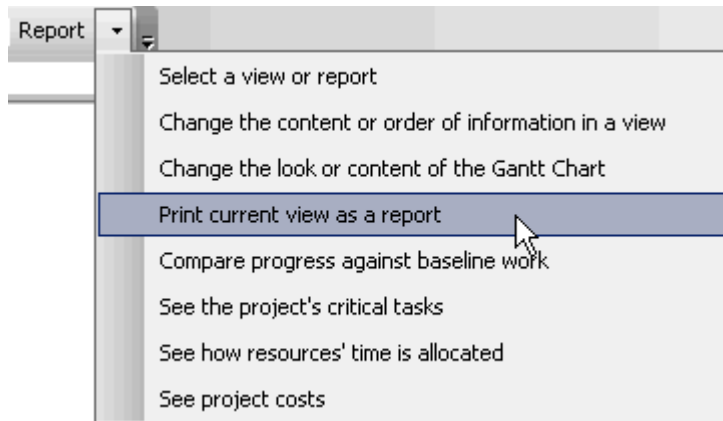


- The **Crosstab** report shows information about tasks or resources broken down by time periods.
- The **Resource** report shows resource information including ID number, name, initials, groups, maximum units rate, accrual, base calendar, and code information.
- The **Task** report shows task information including ID number, name, indicator icons, duration, planned start and finish dates, predecessors, and assigned resources.

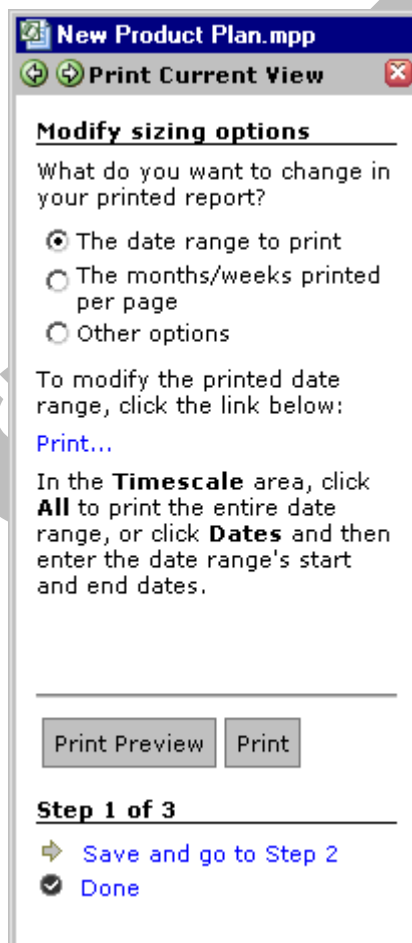
## The Project Guide for Printing Wizard

## Using the Project Guide for Printing Wizard

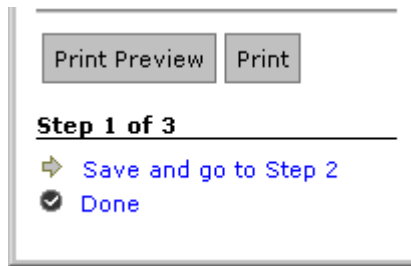
- Project 2003 has added a new feature to the Report topic in the Project Guide – **Print current view as a report**.
- This allows you to print exactly what you see on the screen as a report which further customises printed reports.
- From the Project Guide toolbar, select **Report > Print current view as a report**:



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



- There are three steps in the process. You can choose to preview or print the report at any stage during the steps by clicking on the buttons in the lower half of the pane:



- In Step 1, select the number of pages you would like to see in your report.
- Click on **Save and go to Step 2** to continue.
- In Step 2, choose the sizing of your report.
- Click on **Save and go to Step 3** to continue.
- In Step 3, choose the header, footer, or legend options you desire.
- Click on **Save and go to Step 4** to continue.
- In step 4, make any additional modifications you would like to see in your report.
- Click **Print** to print your report.
- This will open the **Print** dialog box.
- Click **OK** to print.

## Customising Reports

---

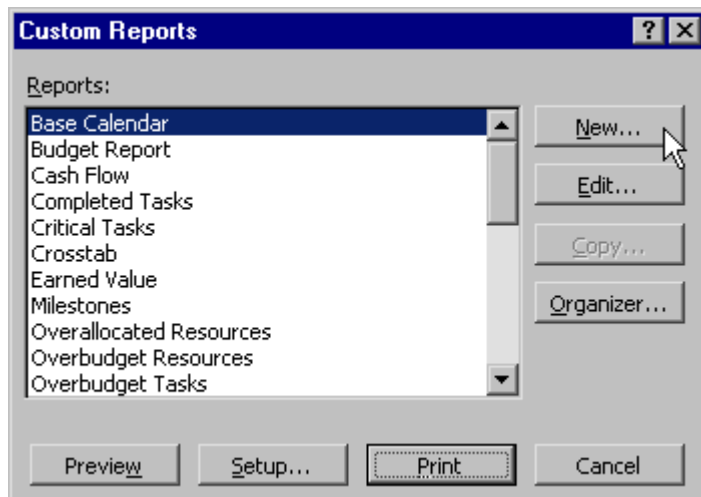
### Using Customised Reports

- You can customise any report which has been covered in this chapter to suit your particular needs. You can create a new report or edit an existing report.
- Depending on which report you are customising, different dialog boxes are displayed to assist you in changing formatting, field information, etc.

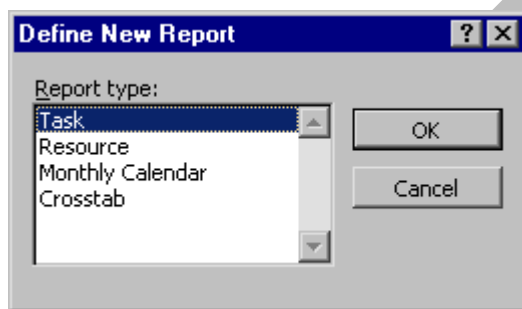
### Creating a New Report

- To create a new report, click **New** in the **Custom Reports** dialog box:





- Project offers four formats to base your new report on: **Task**, **Resource**, **Monthly Calendar**, and **Crosstab**.
- Select the report type you would like to create from the **Define New Report** dialog box and click **OK**:

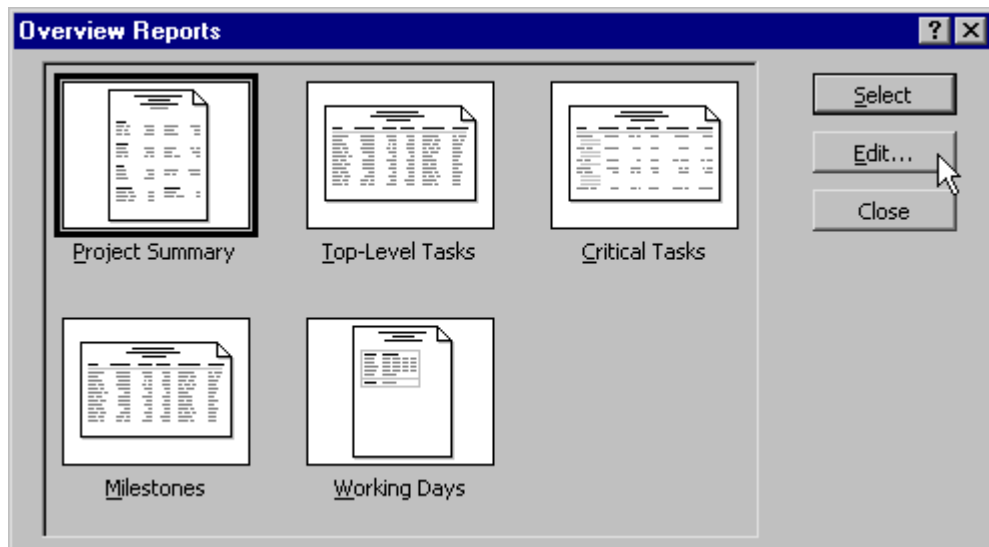


- Depending on the type you select, the appropriate dialog box appears to assist you in building your report.

---

### Editing Existing Reports

- You can edit any report by selecting **Edit** from any **Report** dialog box:



- Depending on which report you are editing, the appropriate dialog box appears to assist you.

## Review Questions

### How would you:

- Use print preview?
- Use page setup?
- Use the print dialog box?
- Start the report generator?
- Use the different types of reports?
- Use the Project Guide for Printing wizard?
- Customise reports?