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About this Course

This course has been designed specifically for delegates with little or no experience of Microsoft Office Project 2010 and will give you a basic understanding of the program. Delegates will benefit from this course whether they are full-time or part-time Project Managers.

The objectives of this course are the following:

- A basic understanding of Project Management
- Top New Features of Project 2010
- Planning you project using WBS
- Setting Project objectives
- Specify Task Relationships
- Using Lag and Lead Time
- Inserting Milestone and Recurring Tasks
- Entering Date Constraints and dependencies
- Defining Resources for your project
- Formatting your project
- Manipulating Views
- Printing your project
- Preparing and Printing Reports

Both the Course and the Manual will give you '*Hands-On'* experience, which is vital to your learning process within Project 2010.

About this Manual

Within the Manual's contents, we have for simplicity, kept terminology to a minimum. Any terminology we have used is fully explained in easy to understand statements.

The Manual has been designed to provide you with a useful tool both in the classroom environment and as a Reference Book once the course is over.

At the beginning of each topic you will see a list of Module Objectives that detail exactly what the topic contains.

Each topic is graphically represented at the top of each page with some diagrams and/or text. Often these are condensed items for the particular topic. Within each topic are *'snapshots'* of dialog boxes you will see on your own screen as you go through the course. This will assist you when you re-examine any particular topic as to what you should be viewing on your screen at any given time.

At the end of each Module you will find a Practical Session, where you can try out a list of topics for yourself.

Whilst working with the Manual, you will see that when you are asked to click on something on your screen, the text will be in **bold**. For example:

'Click the **Ok** button'

In this instance, we would like you to click on the button, which says **Ok**. 

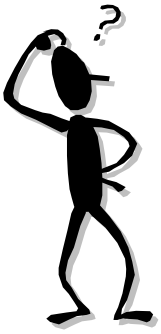
We are always interested in your comments on the Manual, Course and Tutor. We would ask, therefore, that you give your comments on your Course Evaluation Sheet at the end of the Course.

Project Management

Learning Module Objectives

When you have completed this learning module you will have understood:

- How to define project objectives
- What is Project Management
- What are Project Objectives
- Why bother to plan?
- What is expected of the Project Manager
- A typical project lifecycle
- The concept of Work Breakdown Structure (WBS)



What is a Project?

"A sequence of activities that will meet a specific aim or objective, and require the control of resource, cost, time and quality".

- **Must have a Start and/or Finish date**
- **Must have an objective**

What is a Project?

Background

The term 'project' is very heavily used nowadays, but despite continual usage it's meaning is often not clearly understood. Classically a Project is described as:

> *"A sequence of activities that will meet a specific aim or objective, and require the control of resource, cost, time and quality".*

A Project must have a clearly defined start and/or finish date; if there is no finish date then you are probably managing an ongoing initiative or a process, not a project.

A Project must also have an objective. If there is no objective, there is no project. However, objectives are only the expression of the underlying business needs, and it is therefore vitally important to set the correct objectives, and to be prepared to change these to suit the changing needs of the business.

Commercial factors influence business needs and are helpful in establishing the right direction and defining the goal posts for the project. Unless everyone understands the business needs, and how the project fits into the organisation's overall strategy; it will be difficult to translate the need into clear project plans.

In many cases, the Manager's attention becomes so closely focused on the product, or on the technology, the changes in the business needs are neglected. This may lead to successful completion of an expensive project that the business no longer wants.

What is Project Management?

- **The discipline of ensuring the project objectives are achieved on time and within budget**

What is Project Management?

Background

Project Management is the discipline of ensuring that the project objectives are achieved within the given deadlines, constraints and so on. It includes:

- Client Management
- Quality Management
- Project Planning
- Project Control
- Team Leadership

Project Planning and Project Control are covered in further detail in this course. **This course does not include Client Management, Quality Management, and Team Leadership**. Although these skills are essential, specialist training on Project Management best addresses them. What we do teach is Project Planning and Project Control.

Note: If you are interested in Project Management, courses are run on Project Management Fundamentals (1 day) or Prince II (5 days), which is the methodology behind Project and delegates, can gain Prince II certification at the end of this course. For further details, please contact us for more information. Client Management, Quality Management and Team Leadership are all classed as *Soft Skills* and courses are run on these in accordance with the ILM (Institute of Leadership and Management). For further details, please contact us for more information.

The Role of the Project Manager

You own job title may not be Project Manager but you may still need to use project management skills to meet your goals successfully. The Project Manager stands at the very centre of a large information network. His role in the early stages of a project is to work closely with his management and staff to define the goals of the project. Once the project is underway he must:

- Coordinate
- Supervise
- Assess
- Plan
- Evaluate

The Project Manager's task is to guide the project to a successful conclusion.

What about Project Objectives?

What about Project Objectives?

Background

The objectives of the project in terms of the product's quality, cost and time required must be established as early as possible. These three elements are inevitably in conflict, and project decisions constantly involve trade-offs between them. The only way to decide upon the most suitable trade-off is to relate it back to the business needs. Unless the business needs are clearly established at the outset the manager cannot determine how to identify the ideal compromise between time, cost and product.

What is the objective of the Project?

Before you begin your project you must start by determining what the objectives/goals of your project are. Be as specific as possible and include dates, numbers and items. A typical project could be:

- Moving the company to a new location
- Setting up a new department
- Building a new office block
- Planning a Wedding or engagement party

Assess your project and define your goals

Think about how complex your project will be:

- How many people will be required (resources)?
- Do you have to keep to a tight budget (costs) or is the budget flexible?
- Do some tasks depend on another?
- Which tasks are critical to the project?
- Do you have to work to parameters or constraints?
- Do you wish to mark phases of your project (milestones)?
- What signals the end of the project?

Typical Project problems

When your project is up and running you may come across problems which may be defined as:

- Deliverables not understood by project team or management
- Budgets and schedules over or under estimated
- Over taxed resources

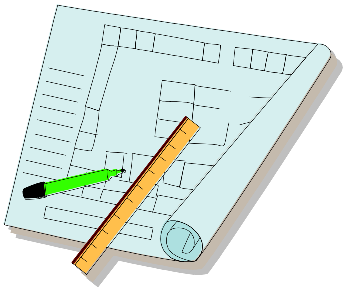
Note: A *deliverable* is a tangible and measurable result, outcome, or item that must be produced to complete a project or part of a project. Usually, the project team and project stakeholders (people with an avid interest in the outcome of the project) agree on project deliverables before the project begins.

Consider writing a Scope document

A *Scope* document forms a formal understanding of project deliverables and should be defined with all individuals or groups that have an interest in the outcome of the project. It becomes the basis for any future project decisions and planning. It contains all project deliverables and project objectives, which are used to measure criteria for project success.

Plan! Why Bother?

- **Plan as early as possible**
- **Consider this time as an investment**
- **Will pay dividends later**
- **You will spend less time dealing with unforeseen problems**



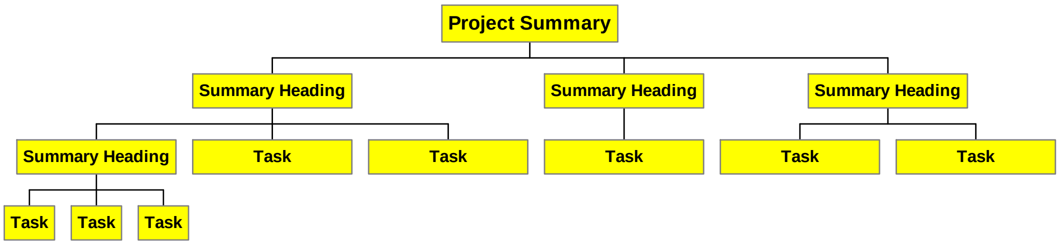
Plan! Why Bother?

Background

A fundamental tool of good management practice is *planning*. No venture should be embarked upon without some initial investment of time in considering a plan, however coarse the plan may be. The use of this time should be considered as an investment since the time spent at the beginning of a venture to consider its development will pay dividends later when less time is spent dealing with unforeseen problems.

The time to consider planning is *as early as possible*. Consider Time Management is a discipline, which must be part of a manager's skills. The undisciplined use of time can only be considered as poor management practice – a busy manager is not necessarily an effective manager.

Plan with Work Breakdown Structure (WBS)



Plan with Work Breakdown Structure (WBS)

Background

Some planning with good old fashioned paper and pencil now will help when it comes to use Microsoft Office Project 2010 for your own project.

Work Breakdown Structure (WBS)

The Work Breakdown Structure (WBS) can assist in the planning stage because of its simplicity. It is similar to a family tree or organisation structure. Begin with the aim or objective and then progressively work down into summary tasks and then into the smaller subtasks.

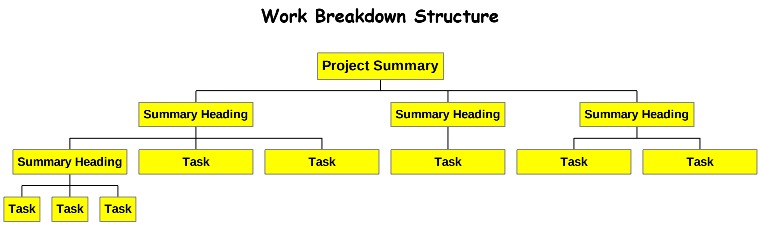
If the WBS is ***TIME BASED***: **Phase I, Phase II** and then **Phase III** which may be broken further down into **Phase Ia, Phase Ib, Phase Ic** and so on.

If the WBS is ***WORK BASED***: **Planning, Appoint Architect, Draw up plans, Obtain Planning Permission** etc.

If the WBS is ***ORGANISATION BASED***: **Civil Engineering, Mechanical, Electrical, Sales, Marketing** etc.

The important principle to note is that the structure should be consistent and logical with a clear hierarchy.

Examples of Work Breakdown Structures

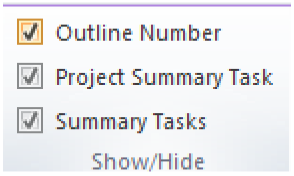


WBS Codes

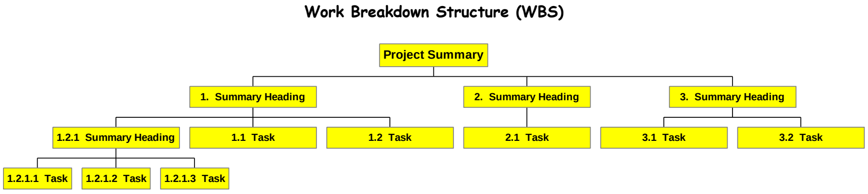
When you outline a project, Project 2010 numbers each task automatically and sequentially with an outline number. These outline numbers are used as the default WBS codes and are updated automatically when you change the project outline.

To show Outline Numbering

- From the **Format**, tab
- Sselect **Show/Hide** group of buttons
- Select **Outline Number**



Example WBS with Codes



Example Project screen with WBS Codes

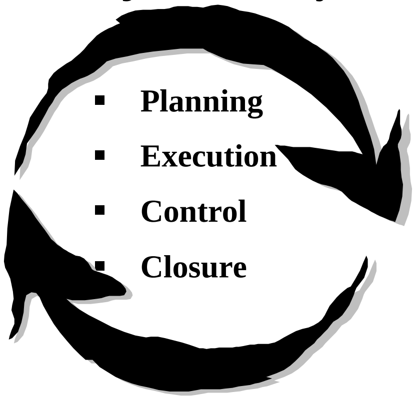
		Task Name	Duration
0		Relocate Office	94 days
1		1 Planning	50 days
2		1.1 Write proposal document	10 days
3		1.2 Board Review	3 wks
4		1.3 Authorisation to proceed	0 days
5		1.4 Negotiate lease	5 wks
6		1.5 P:roduce layout drawings	15 days
7		1.6 Select removal company	2 wks
8		1.7 Planning Complete	0 days
9		2 Refurbishment	58 days
10		2.1 Negotiate with Contractors	2 wks
11		2.2 Appoint Contractors	5 days
12		2.3 Building alterations	28 days
13		2.3.1 Partitioning	10 days
14		2.3.2 Decorating	10 days
15		2.3.3 Lay carpets	8 days
16		2.4 Refurbishment complete	0 days
17		3 Moving	39 days
18		3.1 Distribute boxes	6 days
19		3.2 Packing	10 days
20		3.3 Move equipment and boxes	6 days
21		3.4 Set-up furniture	5 days
22		3.5 Set-up office equipment	5 days
23		4 Project Review Meetings	20.25 days
29		5 Project Complete	0 days

Top Down Hierarchy

The examples shown above in producing a WBS is called ***'Top Down Planning'.***

On the other hand you could define all the smaller subtasks first and then put them into sections (summary tasks). This is called ***'Bottom Up Planning'***.

The Project Life Cycle



- **Planning**
- **Execution**
- **Control**
- **Closure**

The Project Life Cycle

Background

The Project Life Cycle typically is divided into stages as follows:

- Planning
- Execution
- Control
- Closure

Planning Stage

Should be the project definition with the project plan refined until the timescales and costs are acceptable and are agreed with the Project Sponsor. This should be in line with the Scope document, if there is one.

Execution Stage

During the Execution or Control stage the planned tasks are carried out and progress checked against the plan.

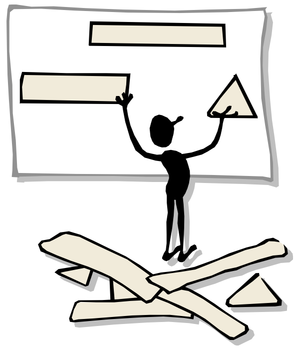
Control Stage

This is where the work is measured and the status reported. For example, did tasks start or finish when you planned or did they actually start or finish early/late. The plan is adjusted and shows *actual* against *variance*.

Closure Stage

The final stage where the outcomes are reviewed, financial obligations and contracts settled, resources '*freed up'* or released.

Practice Session



Practice Session 1

This session is designed to give you a chance to put into practice the topics you have just been taught. (*The numbers in brackets identify the page numbers relating to the topic).* In this practice session simply write down the answers next to the question. Some of the questions will involve your own projects and your thoughts on putting it together.

1. What are the two things every project must have? *(Pg 9)*

2. Would you consider writing a Scope document? Why? *(Pg 11)*

3. Would you plan your project using WBS? Why? *(Pg 14)*

Getting Started with Project 2010

Learning Module Objectives

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

- What is Microsoft Office Project 2010?
- Top New Features from Project 2007 to Project 2010Load the Microsoft Office Project 2010 program
- New Interface and the Ribbon
- Backstage View
- Quick Access Toolbar
- Overview of the Screen
- Obtaining Help using Search
- Open an existing Project
- Open the Project template
- Understand why we are using this template
- Scrutinise the Gantt Chart View
- Observe the different tables
- Base Calendars, Standard Calendars, Task Calendars, Resources Calendars

What is Microsoft Office Project 2007

- **Project Management Tool**
- **Helps to Plan, Manage, Tack, and Share Projects**
- **Can be used for any project size**
- **Predefined Templates available to use to get you started**

What is Microsoft Office Project 2010?

Background

Microsoft Office Project 2010 is the latest version of this market-dominating Project Management Tool which complies with all the conventional Project Management Principles.

Project management software was first introduced in the 60's for mainframe computers. In the 70's and 80's they were further developed for the new microcomputer. In the early 90's there were over 100 Project Management Software Packages available. Microsoft Office Project 2010 is one of the Market Leaders today.

Project 2010 used as a Project Management Tool will assist you in Planning, Managing, Tacking, Reporting and Sharing projects all over the world with your Project Team and Project Board. Microsoft Office Project 2010 can be used for any project size. You can also manage multiple project using a Master and Subordinate project. This file is usually handled by the highest ranking Project Manager who overseas all the Projects for the company.

Top New Features from Project 2007 to Project 2010

The Ribbon and File Tab with Backstage View

Similar to other Office 2010 applications, Project 2010 now has the Ribbon with tabs and groups of buttons on the tabs to work with. This makes finding a command very simple. Backstage View will assist users with Saving, Opening, Closing and Sending Projects.

Add Columns by Clicking

To create a new column now could not be simpler. Just click at the end of the last column and select the column you require or type a column name in the top.

Team Planner View

This new view will assist in reviewing what your resources are doing and if they have too much work to do at the same time. Tasks can be dragged and dropped around to resolve overallocations or to simply move tasks to where you want them.

Timeline View

With this new view you can see a timeline above your project to determine when tasks will be done. You can copy this timeline to Outlook to email or to PowerPoint for a presentation.

Task Inspector

Will assist in inspecting your tasks for problems and gives options on how to solve the problems you are faced with.

Simple Manual/Automatic Scheduling Switching

Swap between manual and automatic scheduling at the click of a button.

New Formatting to Gantt Bars

At the click of a button you can change the Gantt bars to look dramatically different.

New Dynamic Copy and Paste

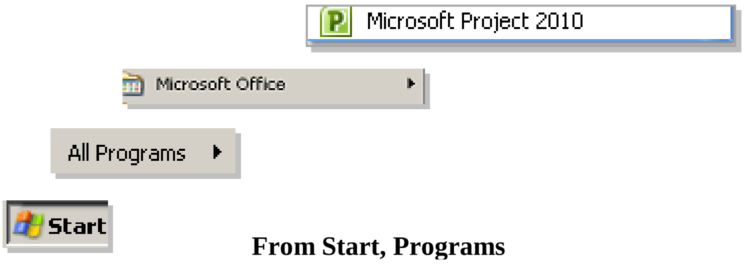
Select bulleted tasks in an Outlook email or a Word document and paste them into Project 2010 to start your new project off. Project keeps all the bulleted formatting for easy scheduling

Text in Duration, Start and Finish columns

When tasks are manually scheduled, you can enter words like soon into the duration column if you don't know exactly when the task should be set. You can also enter words like After Inspection in the Start or Finish Columns if you want to state when this task will be scheduled.

Getting Started

Microsoft Office Project 2010 icon on the Desktop



From Start, Programs

Getting Started

What is Microsoft Office Project 2010?

Microsoft Office Project 2010 is a powerful planning tool, with many features to satisfy a wide range of Project Management needs and experience levels. It is a database, which graphically represents the information you enter with objects on the Gantt Chart. The Gantt Chart is the default view.

Getting Started

Project may be loaded in the normal way, for instance by opening the application, a shortcut or any document created in the application previously.

- From the **Taskbar**, click on the **Start** button 

- Choose **All Programs** 

- Locate and select **Microsoft Office** 

- Locate and select Microsoft Office Project 2010 

New Interface

With the launch of the brand new Microsoft Office 2010, the first noticeable feature is the User Interface. Microsoft has kept a similar interface with Office 2007. All Office 2010 programs now have this brand new look.

Microsoft has made huge changes to the interface and what fantastic changes they are. Gone are the Menus, Toolbars, Task Panes and dialog boxes. These features were good in their time where commands were limited but now that Microsoft Office can do so much more these features would not work so well.

Being replaced by the Ribbon, Contextual Tabs and Galleries, users will now find it easier and faster to get the results they want.

If you have been using earlier versions of Office, give yourself some time to find out where everything is and don't get too frustrated if you can't find something. If this is the first time you have used Office 2010, you will find that you will learn where everything is in no time at all. Just keep thinking logistically where you would find things.

In this section of the course we are going to look at different parts of the interface to help you to familiarise yourself with the main parts of the screen first. Then we will move onto more in depth topics like formatting, views, page layouts etc.

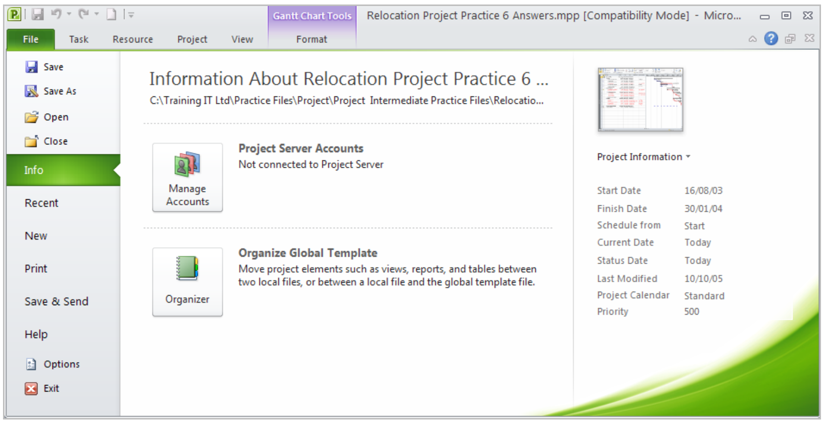
The File Tab

This is the central location which holds the things you need to do most often

The File Tab

The File Tab Backstage View

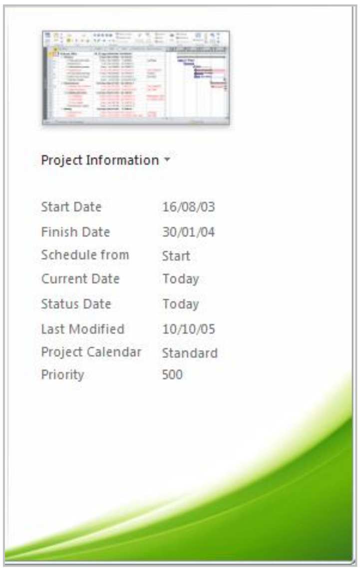
The **File Tab, *also known as the Backstage View*** is bright green so that it stands out from the rest of the tabs. This is the central location which holds the most common things you need to do with your document like New, Open, Save, Print, Publish, Close and Send and is split into three sections. We will go through each section to enable you to familiarise yourself with these important options.



Here we can see The Info section.

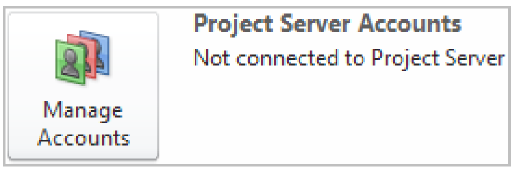
Info

Here you can see information about the open Project at the right hand side of the window. You can clearly see the Start Date, Finish Date, Schedule from, Current Date, Status Date, Last Modified, Project Calendar and Priority.



Info – Project Server Accounts

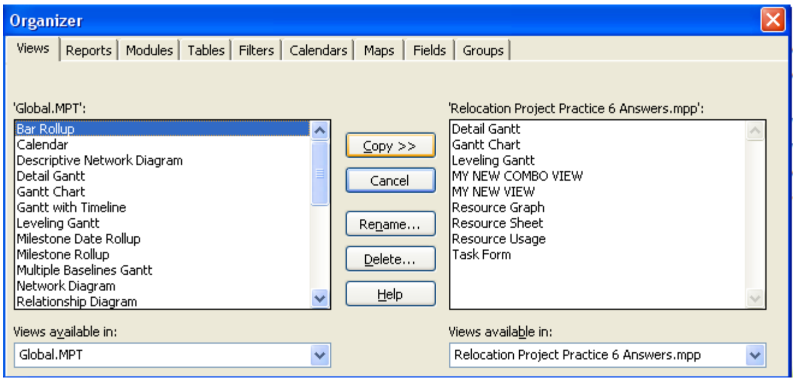
If you are linked to SharePoint 2010 and a Project Server, you would set up your Server Accounts here. As you can see, we are not linked to a server therefore we will not go into this section in too much detail..



Info – Organise Global Template

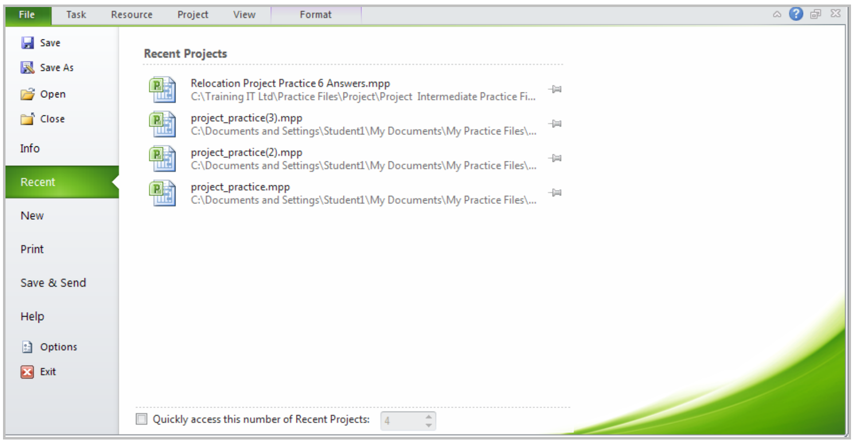
The Organize Global Template will hold all elements like Views, Reports etc to enable you to swap these elements between different projects. If you customise one of these elements, you only need to customise it once, then you can add it to the Organize Global Template.

Clicking the Organizer button will dislay the window you see below.



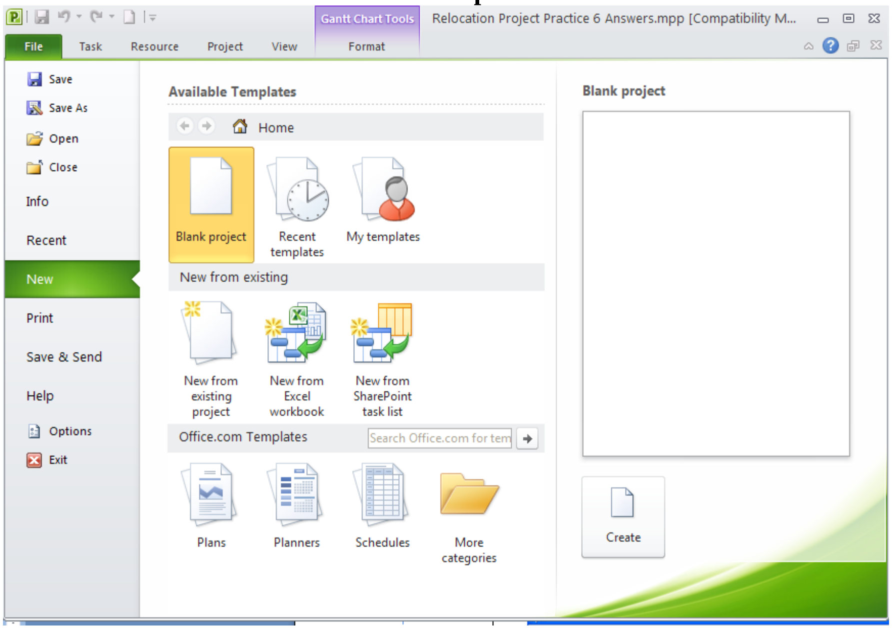
Recent

In the Recent Documents at the right, you will be able to see a list of up to 17 documents recently used. You can adjust this figure up to 50, if required but clicking on the **Quickly access this number of Recent Project** box. Alternatively, you can select the Options button and choosing the Advanced Tab, then Display section. If you want to keep a document on the list, click the little blue Push Pin in  so that it looks like this .



New Option

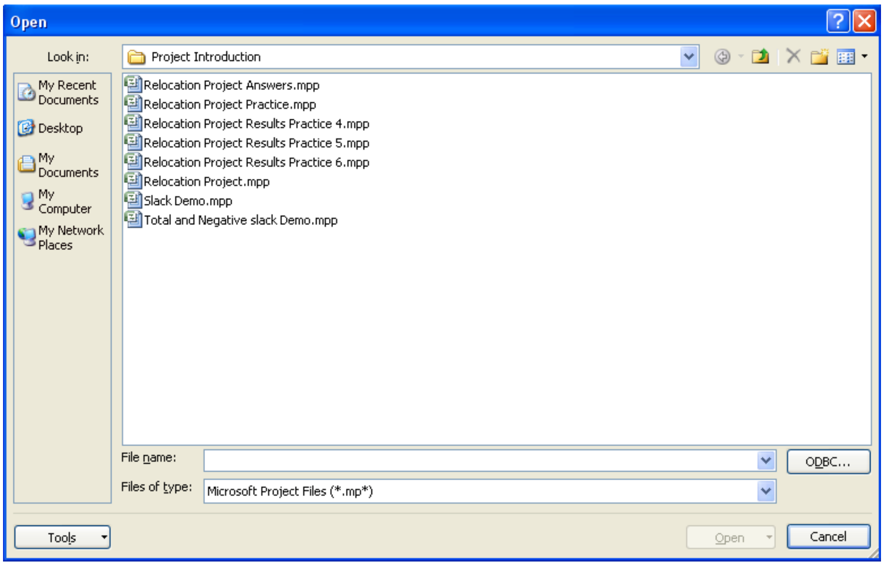
The New option is used when you require a new Project. To activate the button you must click on it. This will invoke the **Available Templates** window.



From here you can open a new blank project, a project using a particular template or a prject which exists either on your own computer or a server you have the ability to access. You will notice two small arrows at the top left of the window which will enable youto go back and forward through this window. A search facility is also available in the middle of the window. Finally, the **Help** question mark.

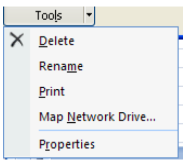
Open

The Open button is used to open a project which lies either on the user's computer or on a server they have the ability to access. You must click on the button to invoke the Open window.



The Open window is very similar to previous versions with the main parts like My Documents and Desktop available in the left window.

There is a new Tools menu down the bottom left of the window and when you click the drop down, you are presented with these options.

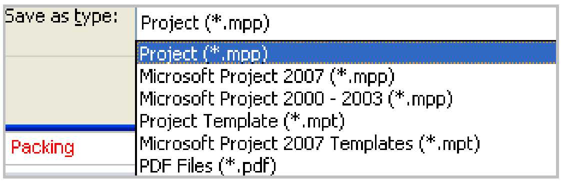


Save

The **Save** option works exactly as it did in earlier versions of Project and will invoke the **Save As** window when clicked.

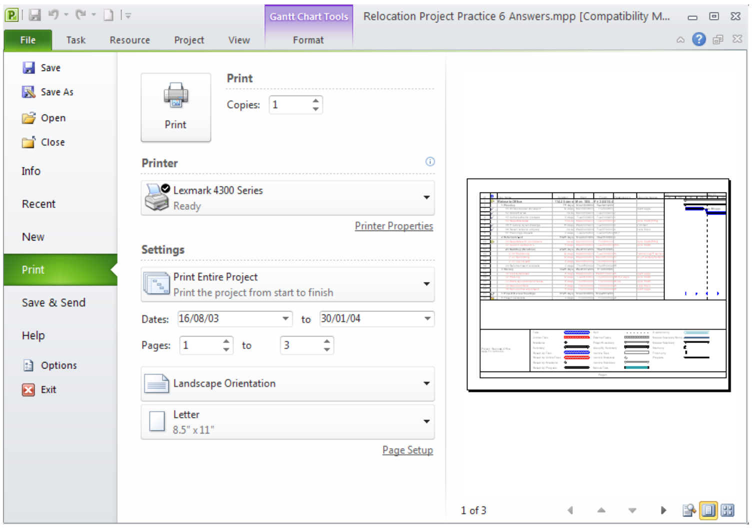
Save As

The **Save As** option is used for saving the document in another format. Here you can save the project either in an earlier version or to PDF or XPS file.



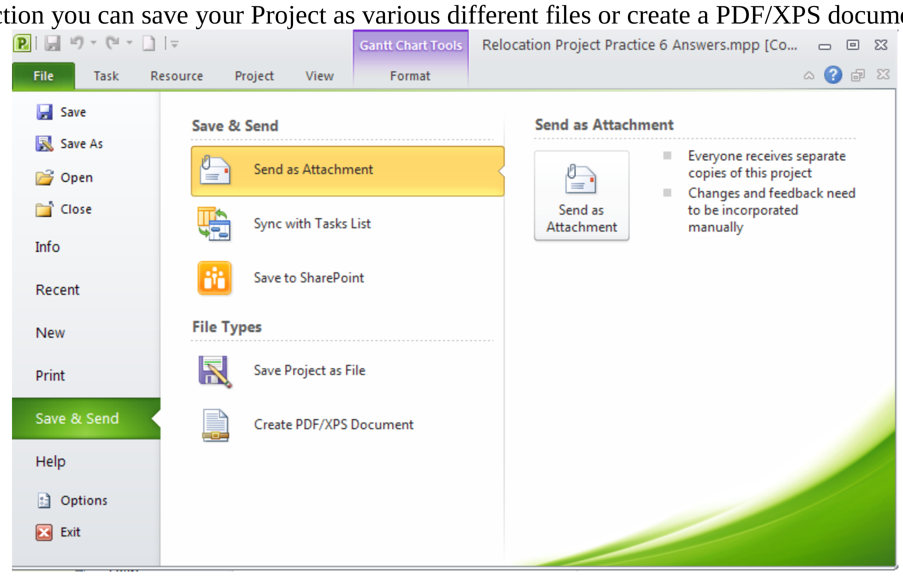
Print

Here you have lots of options. The central panel will allow you to choose how many copies under the **Print** section. Under **Printer** you can select which printer. Under **Settings** you can set up to print the entire project or print a specific page(s), or specific dates and set up Landscape/Portrait etc.. At the right of the screen you will see the current page you on and at the bottom you can navigate to the next or previous pages. If you click the **Print** button your document will be sent straight to the Printer! At the bottom right of the window you can see how many pages your project contains along with the option to see Actual Size, One Page or Multiple Pages.



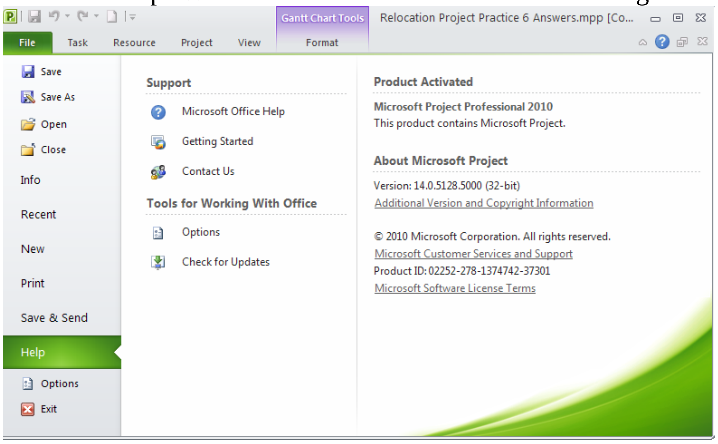
Save & Send

Here you can either send a copy of the document through email as an attachment or publish to SharePoint. You can even Sync with your Tasks List in SharePoint. Explanations are given on the right side of the window for their options. In the File Types section you can save your Project as various different files or create a PDF/XPS document.



Help

Help offers you help on using Microsoft Office Help. Getting Started to learn the basics quickly, Contact Us to let Microsoft know what you think of the products, Options to customise the way Word works, Check for Updates checks for available service packs which helps Word work a little better and irons out the glitches.

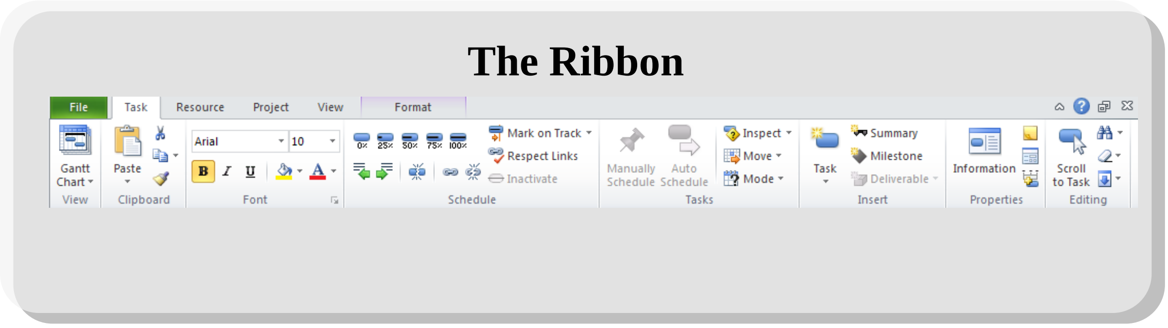


Close

Will simply close the document. If you have made any changes you will be asked if you want to save.

Exit

Exit will close the application. If you have any opened documents, you will be asked to save these before Project closes.



The Ribbon

Background

The new Ribbon replaces the old Pull Down menus which used to appear at the top of the window. These menus were good in their day but now Project 2010 can do so much more, Microsoft wanted a way of enabling users to quickly and visually find commands required to complete their tasks, hence the Ribbon was born.

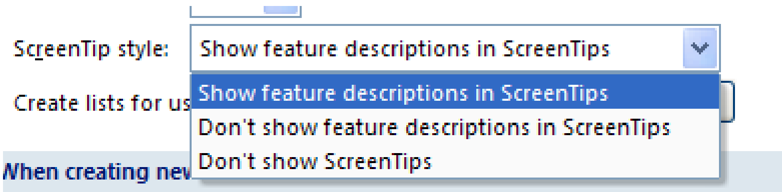
There are 6 tabs within the Ribbon in Project 2010. File, Task, Resource, Project View, and the Contextual tab Format. As we work through this course we will be using most of the tabs you see here therefore we will deal with each one in turn as we get to them.

Hide or Redisplay the Ribbon

- Double click any tab within the Ribbon
- Press **Ctrl + F1** or click any other tab

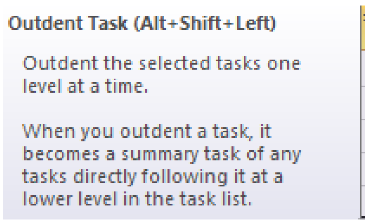
Show Screen Tips

The new option for showing ScreenTips has been greatly enhanced and now gives 3 options which you see below.



These are called **Enhanced Screen Tips** and can be switched on or off by selecting the **File Tab** then **Options** at the bottom of the window. Then select the **General** tab and under the **User Interface Options** select **ScreenTip Style** from the drop down arrow.

If you select **Show feature descriptions in ScreenTips** you will see a pop up box which in the instance below, gives you the keyboard shortcuts to sum plus some text on what the button does.



If you select **Don't show featured descriptions in ScreenTips** you will see this option 

If you select **Don't show ScreenTip** you will not see any pop up box at all. Throughout this manual, **Show feature descriptions in ScreenTips** will be switched on.

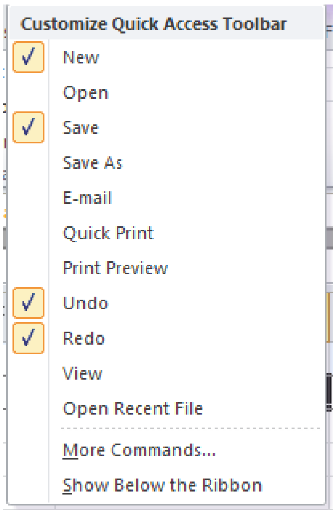
The Quick Access Toolbar

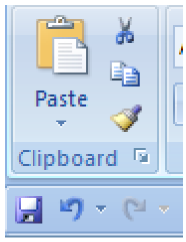
- Usually appears at the top left of the window
- Can have more buttons added
- Can be located below the Ribbon

The Quick Access Toolbar

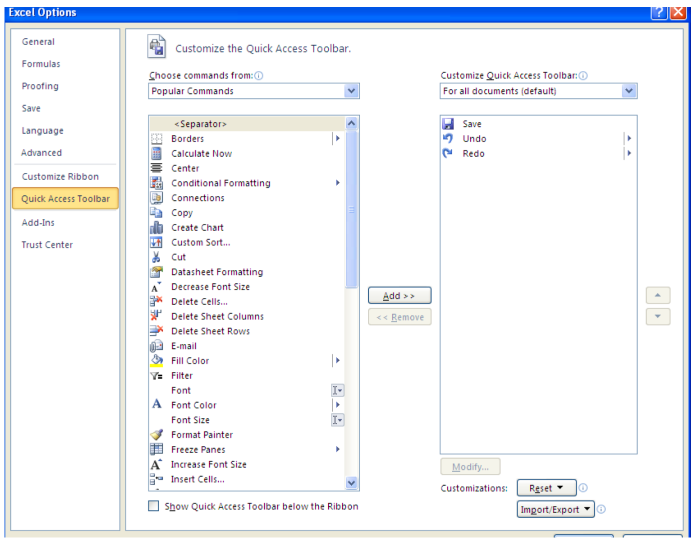
Quick Access Toolbar

At the top left (by default) of the Project window, the Quick Access Toolbar is displayed. The icons on this toolbar represent the most common buttons you will use. The default commands are **Save, Undo,** and **Print**. The toolbar can be displayed above or below the Ribbon. To do this, click the drop down arrow at the end of the icons and select **Customize Quick Access Toolbar below the Ribbon**.



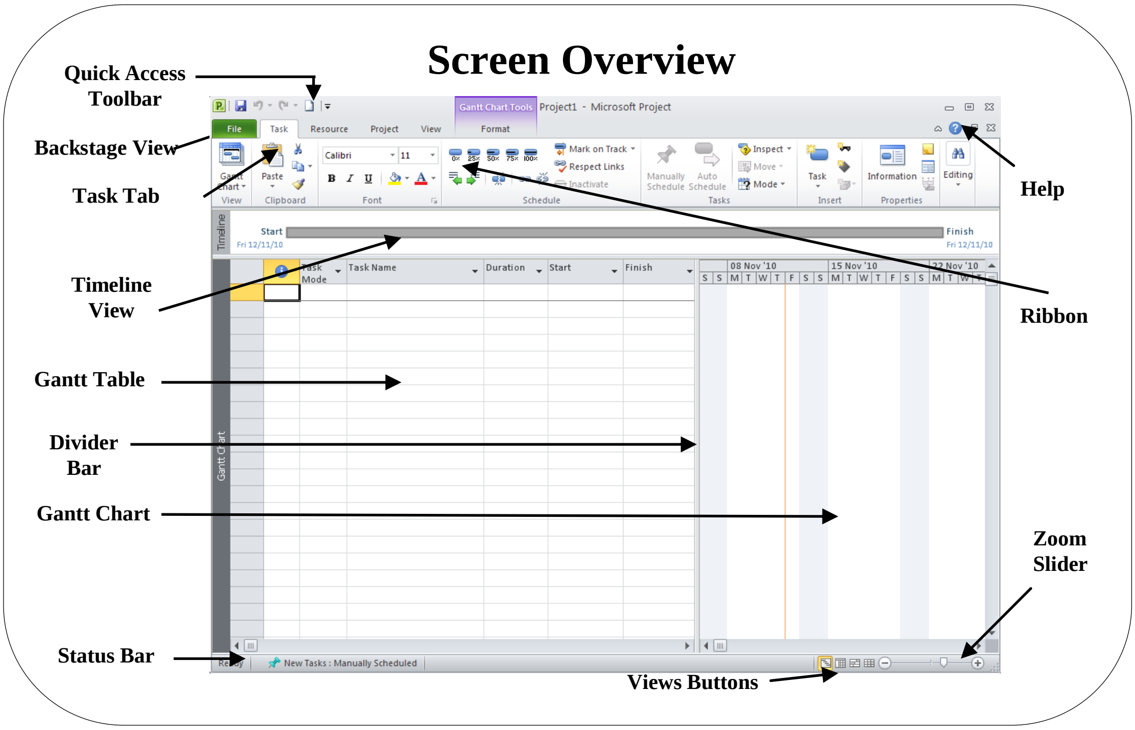


If you wish to customise this toolbar, select **Customize Quick Access Toolbar**. Drag the buttons from the left side of the window onto the right side to place on the Quick Access Toolbar and add the buttons.



Adding Buttons and Tabs

You can now add buttons to any existing Tab or even make a new tab to hold the buttons you require the most. From the **File** tab select the **Options** button then **Customize the Ribbon**.

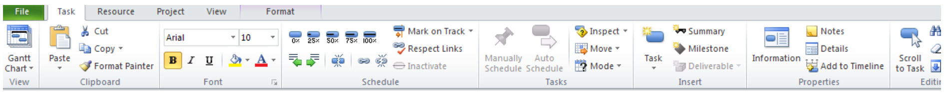


Screen Overview

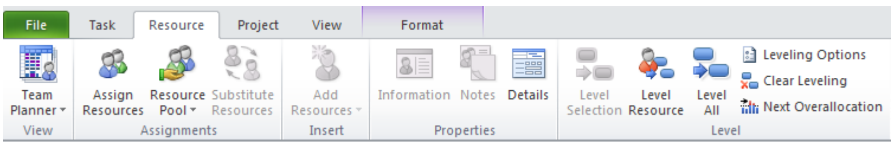
Background

Microsoft Office Project 2010 screen illustrated above is the default screen but includes the new Timeline View.

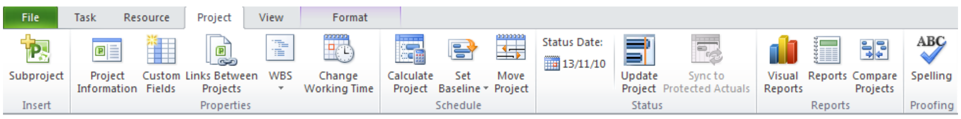
You will notice that the above illustration has the new Ribbon feature which is now in all Microsoft Office 2010 Applications. The **File** tab (Backstage View) and the **Quick Access Toolbar** we explained earlier in this manual, but below we can see the Ribbon which has 6 tabs. File, Tasks, Resources, Project, View and Format. You can add more tabs and buttons if you require. Each tab has groups of buttons and within these groups are the buttons themselves.



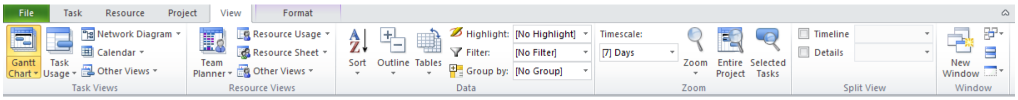
The **Task** tab *(illustrated above)* has the most common command buttons you would use in Project 2010. These consist on **View, Clipboard, Font, Schedule, Tasks, Insert, Properties** and **Editing**.



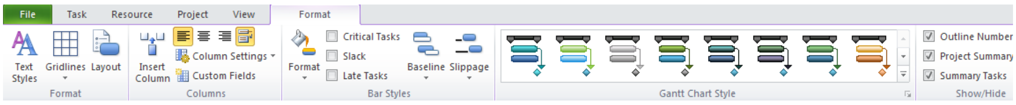
The **Resource** tab (*illustrated above)* has command buttons to allow you to manipulate your resources and the button groups are **View, Assignments, Insert, Properties** and **Level**.



The **Project** tab *(illustrated above)* has command buttons to allow you to manipulate your project and the button groups are **Insert, properties, Schedule, Status, Reports** and **Proofing**.



The **View** tab (*illustrated above)* has command buttons to allow you to manipulate your views of your project. The button groups are: **Task Views, Resource Views, Data, Zoom, Split View, Window** and **Macros**.



The **Format** tab (*illustrated above)* has command buttons to allow you to format your views of your project and is called a Contextual Tab. If you have used other Microsoft Office 2010 applications you will have seen Contextual tabs before but the difference with this one is that it is displayed all the time. In other Office 2010 applications it is only seen when something you insert into your application is selected.

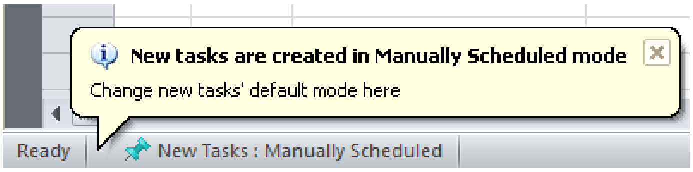
Title Bar

Informs the viewer of the name of the application being used. In this case **Microsoft Project**. Also states the name of the project, which in this case is **Project2 – Microsoft Project**. This name will be used until you save the project and give it another name.

Below you see the project name **Relocation Project Results Practice 4.mpp [Compatibility Mode].** If you open an project created in an older version of Microsoft Office Project (binary) the Compatibility Mode will be displayed. If you open a project in Microsoft Office Project 2007 or 2010 (XML) Compatibility Mode **will not** be displayed.

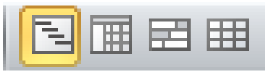
Status bar

When you start a new project, Microsoft Office Project 2010 displays a message informing you that New tasks are created in **Manually Scheduled Mode**. You can change this if you wish to **Auto Schedule** by clicking the button on the Status bar but the default is Manually Scheduled Mode. In previous versions of Project, tasks were automatically scheduled by default so this is a completely new way of working.



View Buttons

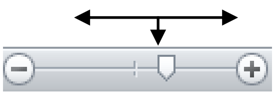
At the bottom right of the window are 4 View buttons to enable you to quickly switch from one view to another. The Views consist of **Gantt Chart** ***(default)*****, Task Usage, Team Planner** (*new view)* and **Resource Sheet**. These are the most common views users will require when working with Project 2010.



Zoom Control

The **Zoom Slider** is available to quickly change the zoom on the Gantt Chart in your project. Dragging the slider to the right will increase the zoom while dragging the slider to the left will decrease the zoom. Alternatively, you can click on the minus button on the left to reduce the zoom by 10% on each click or you can click on the plus button on the right to increase the zoom by 10% on each click. The timescale at the top of the Gantt Chart will change to reflect the zoom.

Click to reduce zoom by 10%

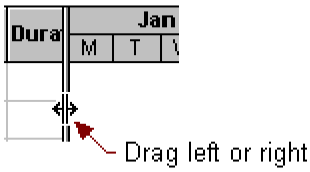


Click to increase zoom by 10%

Gantt Table Left pane which lists all tasks, task durations and other information.

Gantt Chart Right pane which graphically displays the information entered into the Gantt Table i.e. Durations are indicated by a bar extending to the length of the duration. Resources assigned to tasks are also displayed within the Gantt Chart.

Divider Bar Allows the user to move the bar to the left or right thus hiding or displaying more/less Gantt Table or Gantt Chart. To activate rest your mouse pointer on the bar. When your mouse pointer changes to a double-headed arrow, drag to the left or right.

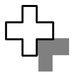


Timeline View This is completely new to Project 2010 and will display any task when required on the timeline. You can format the colours of both the background of the timeline as well as the milestones on it. You can even use the new dynamic feature to copy it to Outlook (email) or copy to PowerPoint.

Mouse Pointers

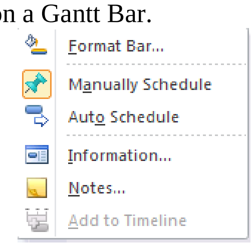
 Standard arrow pointer

 I-beam pointer used for editing

 Select pointer availabel on tables

 Selects a row when placed over the Indicators column

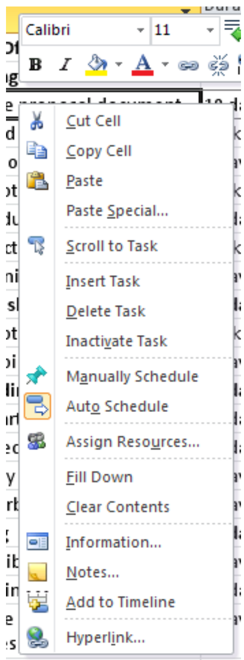
Shortcut Menus Right click anywhere on the screen and you will see a shortcut menu like the one shown below. We have right clicked on a Gantt Bar.



The options listed on the shortcut menu depend upon where you activate the right click.

Here we have right clicked on a task name. Just look at all the things you can now do when you right click.

You also have the **Mini Toolbar** to assist with Bold, Italics etc. This toolbar is available in other Office 2007 and 2010 applications therefore if you have used this in Word or Excel you will have seen this before.



Getting Help

Click the **Help** button at the top right of the window to receive overall help in Project 2010. This will invoke the Help pane and if you are linked to the Internet will go straight through to Microsoft online.

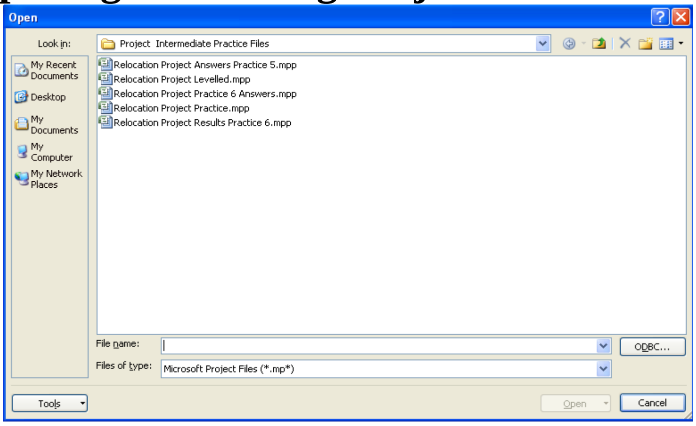
Under **Categories** you can click one of the hyperlinks to obtain help on any of the list topics. Alternatively, if you require help on something specific, click into the **Search** box at the top left of the window, type what you require help on and press **Enter** on the keyboard.

Once you have some *help* you can use the **Forward** and **Back** buttons to navigate you through Help.

To go back to the window you see here, click the **Home** button. You can also print the help you receive, by clicking the **Print** button. The **Help** window should stay put while you work but you can change this by clicking the small pin tack button.

If you want to see a **Table of Contents** for all the help in Project, click the **Show Table of Contents** book button. To view the text in a larger size, click the **Change the Font size** button. To close the window, click the small cross at the top right of the window.

Opening an Existing Project File



Opening an Existing Project File

To open an existing Project file

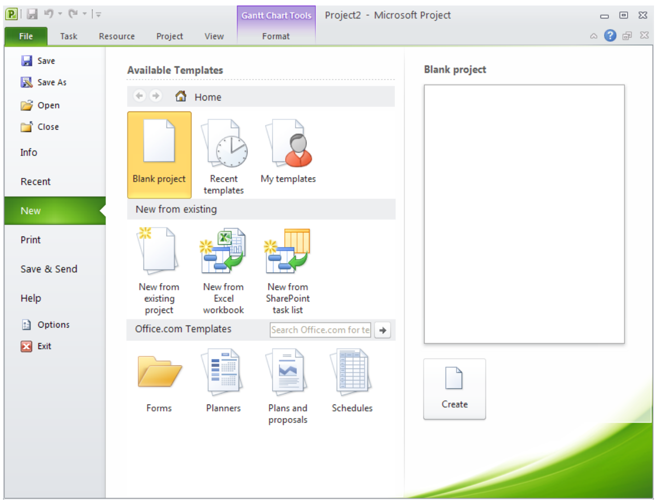
- From the **File** tab, select **Open**
- The **File Open** dialog box is displayed like the one shown above.
- From this dialog box, select the file you wish to open by using the **Look in** drop down list to specify the **Drive, Folder** and the **File name**.

To open a Template from the Templates folder

Microsoft Office Project 2010 comes equipped with pre-defined templates for you to use which you can activate from the **Available Templates** section. You must be linked to the Internet to use these as they are stored on Microsoft's web site. Once loaded they contain all the relevant tasks etc., for the particular project template you have chosen. This option is a good idea if you are not sure which Summary and Sub Tasks you project should have.

You may even wish to design and develop a template of your own. These will be stored in the **New from existing** section. This is discussed in the Intermediate course.

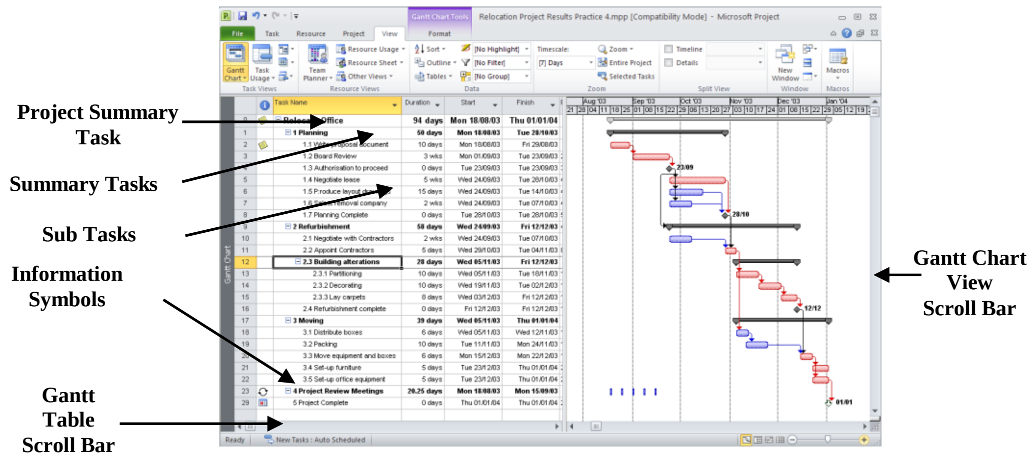
- From the **File** tab, select **New**
- A dialog box similar to the one below is displayed
- Select the **template** (for a blank project click **Blank Project** and click **Create.**



Why use your own Project Template

Your own template could be specifically designed by your own staff for its ease of use. It would contain customised views, fields and macros to enable you all to put together projects in the same way. This should make it easier to combine projects together at a later stage. Also copying and pasting from one project to another is simplified.

Gantt Chart View



Gantt Chart View

Background

The view displayed above is called the **Gantt Chart View** and is the default view in Microsoft Office Project 2010. It was originally developed by Henry Laurence Gantt in 1917 and is sometimes called a Bar Chart. Henry Gantt *(1861 – 1919)*, a Mechanical Engineer, was the third known pioneer (*the other two being Frank and Lillian Gilbreth)* in the early days of scientific management and worked for Frederick Winslow Taylor in the USA. Henry is to be remembered for his humanising influence on management emphasising the conditions that have a favourable psychological effect on the worker. Typically, a Gantt Chart will show a list of tasks down the left-hand column and a series of bars depicting the scheduled duration of the task relative to a horizontal timescale. It is predominantly used for time based scheduling rather than quantity, volume or weight.

Scroll Bars

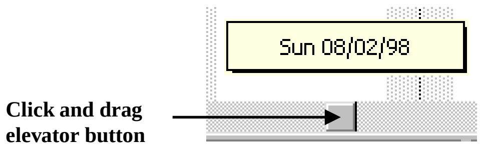
You will notice that there are several Scroll Bars in this view. Each has its own purpose.

Gantt Table Scroll Bar

The Gantt Table scroll bar will scroll just the table element of this view to show/hide the hidden columns under the Gantt Chart.

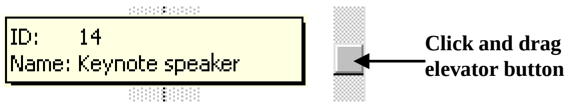
Gantt Chart Scroll Bar

The Gantt Chart scroll bar will scroll just the Chart element of this view to show different timescales. If you wish to go to a particular timescale, click on the **Elevator** button and drag to adjust.



Gantt Chart View Scroll Bar

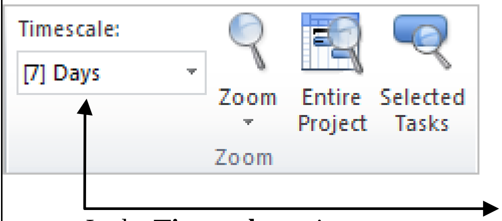
The Gantt Chart scroll bar will scroll both the Gantt Table and the Gantt Chart together. If you wish to go to a particular Task, click on the **Elevator** button and drag to adjust.



Scroll to Tasks

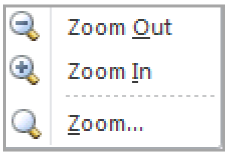
To see the Gantt bar for the selected task, click the **Scroll To Task** button.

Zoom the View

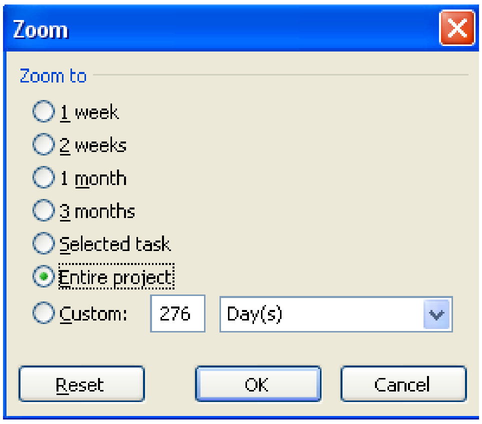


From the **View** tab and the **Zoom** group of buttons, there are a number of ways for you to zoom.

- In the **Timescale** section you can zoom from **[7] Days**
- Or click the drop down arrow and select one of the zooms on the list.
- Click the Zoom drop down arrow and select from one of the zooms on the list

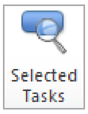


- If you select the bottom button you will see a window like the one below. **Ideal if you want to zoom the whole project!**



- You can have the same effect by clicking the Entire Project button

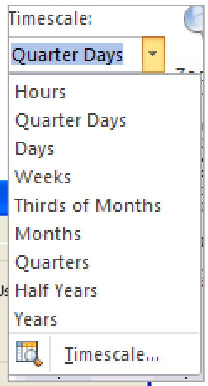
- Lastly, if you select some tasks you could click the **Selected Tasks** button.



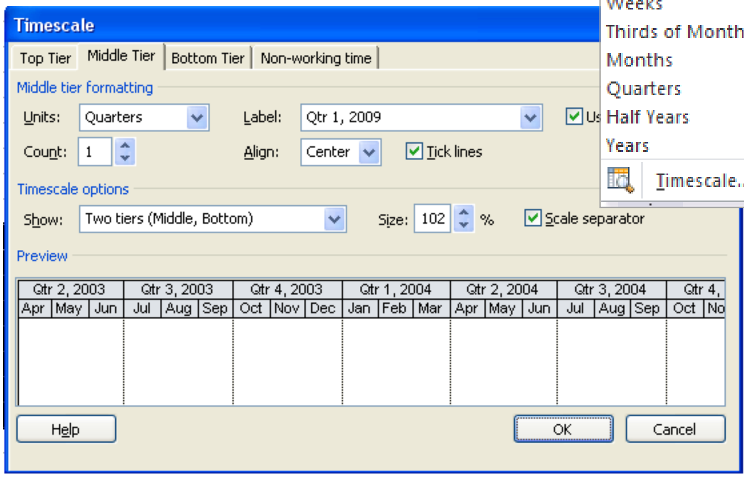
- With all these options the Gantt Chart at the right of the screen will change to reflect the current zoom. If you ***zoom out***, the Gantt bars will ***grow smaller*** and if you ***zoom in***, the Gantt bars will ***grow larger***.

Format the Timescale

Occasionally you may require a different timescale, perhaps for a special report. You can construct your own special timescales:



- From the **View tab,** select the **Zoom** group of buttons
- Select the **Timescale** drop down arrow then

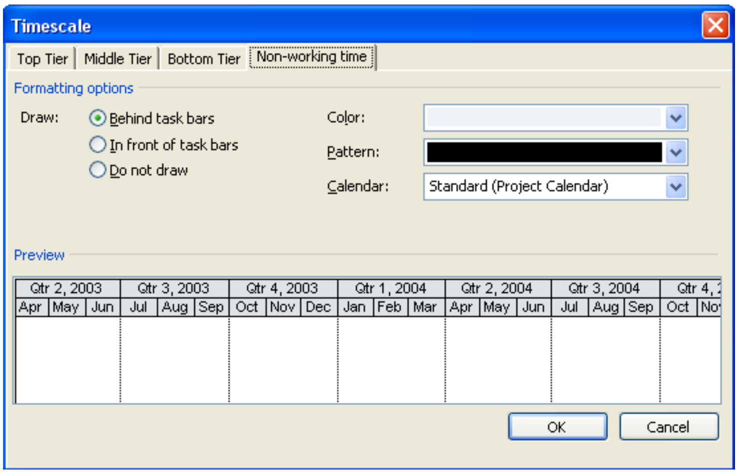


Timescale

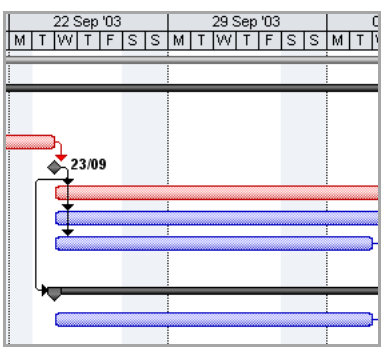
- The **Timescale** dialog box will be displayed.

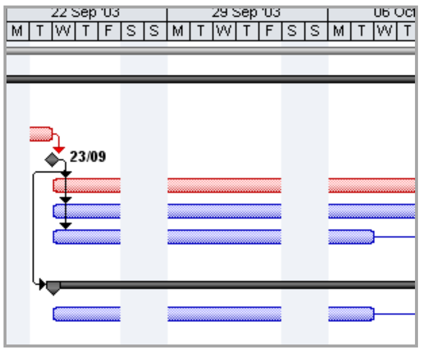
OR

- Double click on the timescale on the Gantt Chart.
- In this version of Project you can change **Top, Middle** or **Bottom** Tiers or change the non-working time format *(see illustration below)*



- Using this option you can choose to draw the colour (*non working time)* in front or behind the Gantt Bars

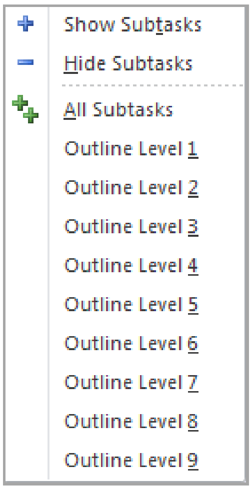




Task Outline Collapse and Expand

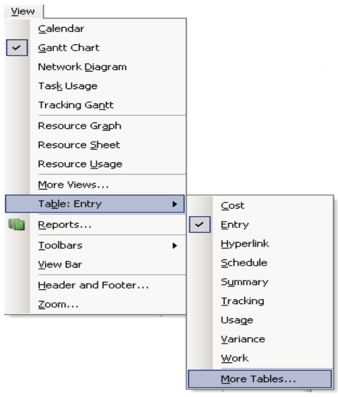
The WBS is indicated by indenting task names from the left-hand margin. If your active row is a **Summary Task** then you can collapse or expand the related tasks in the rows below.

- From the **View** menu and the **Data** group of buttons
- Click the **Show Subtasks** button to expand the Outline
- Click the **Hide Subtasks** button to collapse the Outline
- Click the **All Subtasks** button to expand all the Outlines
- Click the **Outline Level 1 – 9** buttons to expand the specific Outlines



Tables

- **In this version of Project there are 17 different Task tables**
- **The Entry table is the default**
- **Why not custom design your own!**



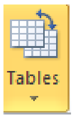
Tables

Background

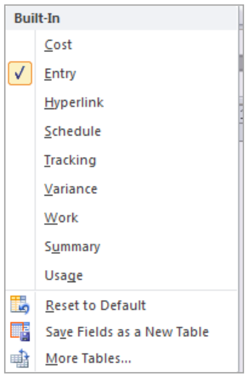
Tables are combined with Reports, Task Sheets, Resource Sheets, Resource Usage view and Gantt Charts to provide control over the data columns that you wish to display. The table menu lists up to 17 different Task Tables supplied or you could custom design your own.

To use another table

- From the **View** menu and the **Data** group of buttons



- Click the **Tables** button drop down arrow
- You will see a list of tables like the ones you see here
- The **Entry** table is the default
- Click the required table
- To see a list of other tables in Project, click the **More Tables** button



- Take a moment to experiment with the other tables by choosing each one from the submenu.

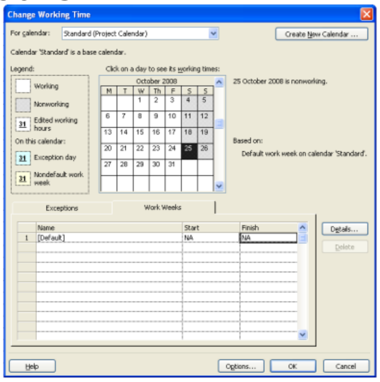
The other tables will give you information on **Costs, Hyperlinks, Schedules, Summary, Tracking, Usage, Variance** and **Work.** To display more tables, select the **More Tables** option.

	Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost	Baseline	Variance	Actual	Remaining
0	**Relocate Office**	**£0.00**	**Prorated**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
1	**1 Planning**	**£0.00**	**Prorated**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
2	1.1 Write proposal d	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
3	1.2 Board Review	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
4	1.3 Authorisation to	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
5	1.4 Negotiate lease	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
6	1.5 P:roduce layout	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
7	1.6 Select removal c	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
8	1.7 Planning Comple	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
9	**2 Refurbishment**	**£0.00**	**Prorated**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
10	2.1 Negotiate with C	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
11	2.2 Appoint Contrac	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
12	**2.3 Building altera**	**£0.00**	**Prorated**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
13	2.3.1 Partitioning	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
14	2.3.2 Decorating	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
15	2.3.3 Lay carpet:	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
16	2.4 Refurbishment c	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
17	**3 Moving**	**£0.00**	**Prorated**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
18	3.1 Distribute boxes	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
19	3.2 Packing	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
20	3.3 Move equipment	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
21	3.4 Set-up furniture	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
22	3.5 Set-up office eq	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00
23	**4 Project Review Me**	**£0.00**	**Prorated**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
29	5 Project Complete	£0.00	Prorated	£0.00	£0.00	£0.00	£0.00	£0.00

The table displayed above is the **Cost** table applied to the Gantt View.

Base Calendars

- **Base Calendars ideally should be set at the start of the project**
- **There are 4 Calendars in Project 2007: Base, Project, Resource and Task**



Base Calendars

Background

There are four types of calendar: **Base Calendars, Task Calendar, Project Calendar** and **Resource Calendars.** They are used to determine resource availability, how resources that are assigned to tasks are scheduled, and how tasks are scheduled. Project calendars and task calendars are used to schedule tasks, and if resources are assigned to tasks, resource calendars are used as well.

A **Base Calendar** is used as a template that the project calendar, resource calendars, or task calendars are based on. It defines the standard working and nonworking times (nonworking time: Hours or days designated in a resource or project calendar when Project should not schedule tasks because work is not done. Nonworking time can include lunch breaks, weekends, and holidays, for example.) for the project. It specifies the work hours for each work day, the work days for each week, and any exceptions, such as holidays. You can select a base calendar to use as the project calendar or as the basis for a resource calendar. You can also apply a base calendar to specific tasks.

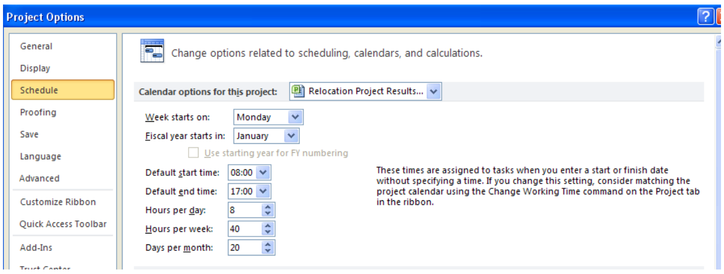
A **Project Calendar** The project calendar defines the working and nonworking days and times for tasks. This calendar usually represents your organization's traditional working hours. Project uses this calendar to schedule tasks that do not have resources assigned or that have a task type of **fixed duration** (fixed-duration task: A task in which the duration is a fixed value and any changes to the work or the assigned units [that is, resources] don't affect the task's duration. This is calculated as follows: Duration x Units = Work.). By default, the Standard base calendar is used as the project calendar, but you can reflect alternative schedules by using other base calendars.

A **Resource Calendar** contains the usual working and non working days, and exceptions for each resource. Project uses the Resource calendars to schedule resource-driven tasks. Resource calendars make sure that work resources (people and equipment) are scheduled only when they're available for work. They affect a specific resource or category of resources. We will use this later when we add resources to our project.

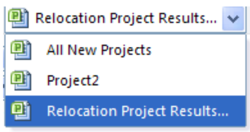
A **Task Calendar** makes it possible to schedule tasks during nonworking time, as defined by the project calendar or resource calendar. For example, you can set up a task calendar if you have a task that needs to be worked on overnight or through the weekend.

To display Base Calendar options

- From the **File** menu, select **Options**
- **Select the Schedule** option
- The following dialog box will be displayed.



- Under **Calendar options for this project** you can apply the settings to this project, All New Projects, or any other open projects.

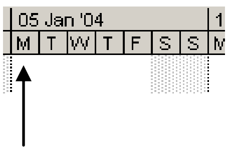


Show Monday as the start of the week

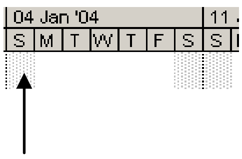
Another useful option on this dialog box is to show Monday as the beginning of the week on the Gantt Chart timescale.

- Under **Calendar options for this project**
- In the **Week starts on** list box.

- Click the downward arrow and select **Monday** and click **OK**



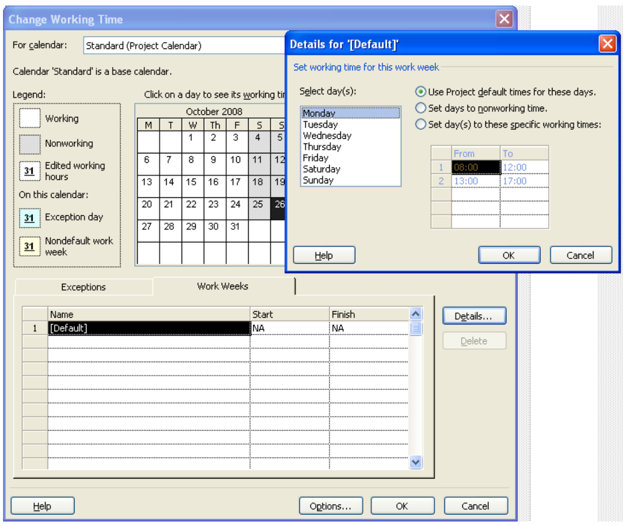
Week start on Monday



Week start on Sunday

Make Changes to the Calendar default

- From the **Project** tab, and the **Properties** group of buttons
- Select **Change Working Time**
- Select the **Work Week** tab then click the **Details** button
- The following window will be displayed

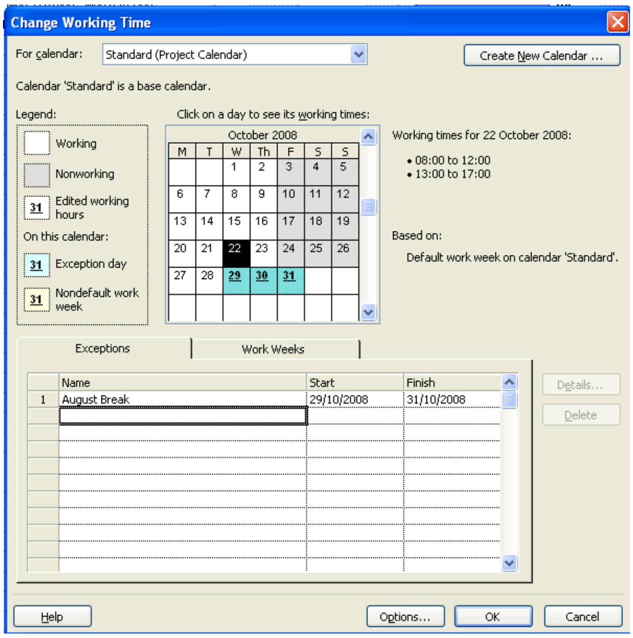


Notice that the **Use Project default times for these days** is automatically selected

- If you want to change any day to a nonworking time, select the day in the left window then select the **Set days to nonworking time** option at the right and click **OK**
- If you want to specific working days, select the day in the left window then select the **Set day(s) to these specific working times** option at the right
- Change the times to suit and click **OK**
- In the **Change Working Time** window under the **Name** section, give your change a name like **Short Wed Working** or something like that to state that this is a change to the normal default

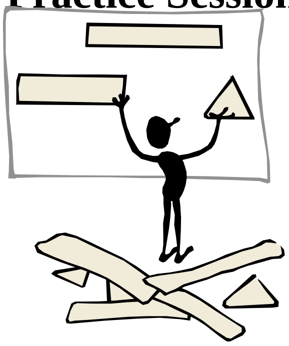
Add Company Holidays to the Calendar

- From the **Project** tab, and the **Properties** group of buttons
- Select **Change Working Time**
- Select the **Work Week** tab then click the **Details** button
- The following window will be displayed



- In the **Exceptions** tab enter a name for the holiday (*we have chosen August Break)*
- In the **Start** field, enter the start date
- In the **Finish** field, enter the finish date
- Click **OK**

Practice Session



Practice Session 2

This session is designed to give you a chance to put into practice the topics you have just been taught. (*The numbers in brackets identify the page numbers relating to the topic).* In this practice session simply write down the answers next to the question. Some of the questions will involve your own projects and your thoughts on putting it together.

1. Open Microsoft Office Project 2010 if it is not already open
2. Open the project file called, **Relocation Project** *(Pg 32)*
3. Move the **Divider Bar** to the left to cover the Start Column. *(Pg 30)*
4. Using the **Scroll to Tasks** button on the **Task Tab**, view the task **Project Complete.** *(Pg 34).* What date is showing on the Gantt Chart?
5. Using the Scroll Bar at the bottom of the Gantt Chart, view the first Gantt Bar. *(Pg 33)*
6. Use your **Zoom out** Tool to zoom the view until you can see all the Gantt Bars on the right of the screen. *(Pg 34)*
7. What is the second task within the Refurbishment Phase?
8. What is the total duration of the Planning Phase?
9. Using the **View** tab and the **Data** group of buttons, change the table to **Cost.** *(Pg 37)*
10. Change back to the **Entry table.** *(Pg 37)*
11. Where would you find the Calendar section within Project 2010? *(Pg 38)*
12. Close the Project without saving it.

Setting Project Objectives

Learning Module Objectives

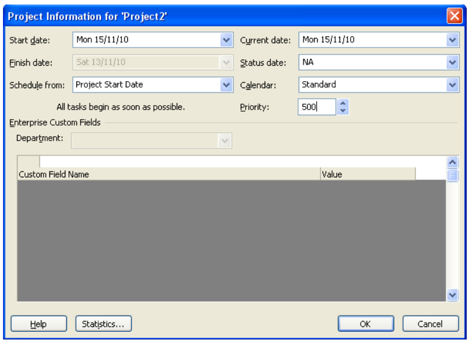
When you have completed this learning module you will have seen how to:

- Use the Project Information and Properties dialog boxes
- Show Summary Tasks
- Outline the plan
- Manual Vs Auto Scheduling
- Use editing techniques
- Using the Right Click
- Cut and Paste Tasks
- Inactivate a Task
- Enter Task Notes
- Enter Milestones
- Change Task Information
- Save Project files

The Project Information Dialog Box

Project Menu,

Project Information

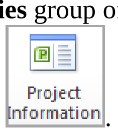


The Project Information Dialog Box

Background

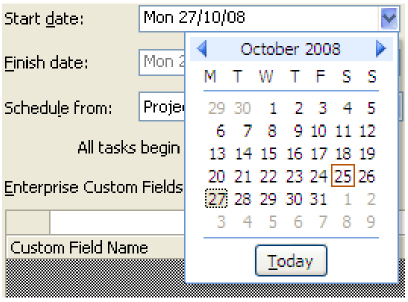
Within the Project Information dialog box you can tell Project either when you wish your project to start or when your wish your project to finish. These options are governed by the top three options. Notice that if you schedule from the Start Date, then the Finish Date box greys out and if you schedule from the Finish Date, the Start Date greys out.

To view the Project Information Dialog Box

- From the **Project** tab and the **Properties** group of buttons
- Click the **Project Information** button .

To enter the Start Date

- Click on the drop down arrow at the right-hand side of the **Start date** box and choose a date from the calendar.



- Alternatively, you can simply type the date in the **Start Date** box.
- Ensure that the **Schedule From** box shows **Project Start Date**.

NOTE: By entering a Start Date, Project is forced to calculate your earliest finish date scheduling all tasks to start **As Soon As Possible**.

To enter the Finish Date

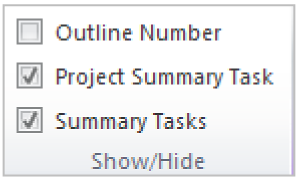
- Click on the drop down arrow at the right-hand side of the **Schedule From** box and select **Project Finish Date**
- Click on the drop down arrow at the right-hand side of the **Finish date** box and choose a date from the calendar.
- Alternatively, you can simply type the date in the **Finish Date** box.
- This option is also known as **Backward Scheduling**.

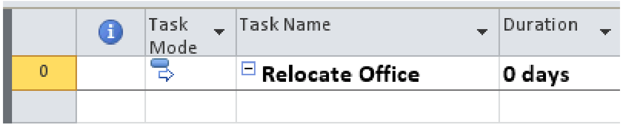
NOTE: By entering a Finish Date, Project is forced to calculate your earliest finish date scheduling all tasks to start **As Late As Possible**.

Current Date Option	Allows you to change the current date if you want to view or report project information from another date. Project continues to use the computer's date to schedule tasks unless you instruct project to use the **Current date** entry.
Status Date Option	At the start of a Project the **Status Date** box should be set to **NA**. This option is used to calculate **earned value** (how much of the budget should have been spent in view of the amount of work so far), create **Progress Lines** (black lines appearing through blue Gantt bars as project is updated i.e. 25%), and determine the complete-through date (from Start date to Finish Date) in the **Update Project** dialog box. A date should be entered into this option to report on costing when the project is up and running.
Calendar Option	Use this option to state which calendar you will use for your schedule. Select from **Standard**, **Night Shift** or **24 Hours**.
Priority	This option is used to prioritise projects, which appear within a Master Project. These subordinate Projects can be sorted by priority order. The numbers range from 0 to 1000. The higher the number, the greater the priority.

Showing Project Summary Tasks

- **From the Format tab**
- **The Show/Hide group of buttons**
- **Select Project Summary Tasks**





Showing Project Summary Tasks

Background

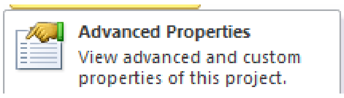
Showing Project Summary Tasks are a useful feature. For example, add a project title which can appear as the first line of the project WBS (this is called the **Project Summary Task**). This is handy if you want to insert one project into another or simply want to keep track of which project you are manipulating.

To Show Project Summary Task

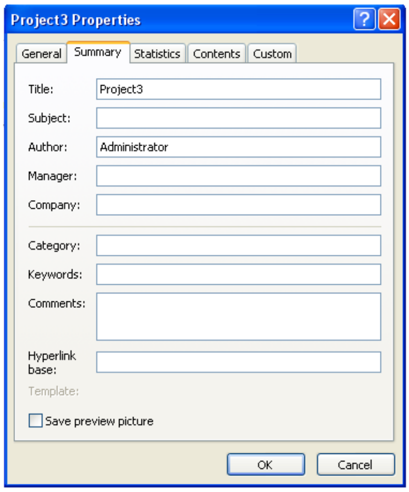
- From the **Format** tab and the **Show/Hide** group of buttons
- Select **Project Summary Task** tick box
- Select the **Summary Tasks** button also *(or won't be able to see it)*

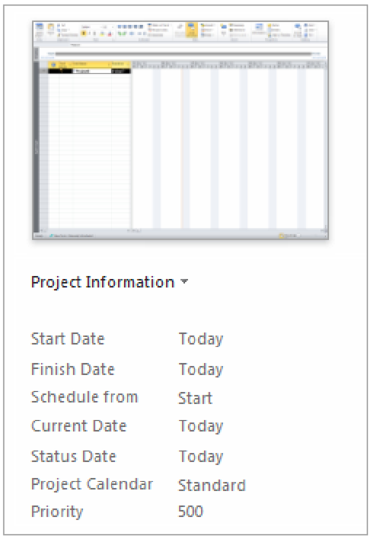
Display the Project Properties window

- From the **File** tab, select the **Info** section
- In the right hand pane where you see the preview of the project click the **Project Information** drop down arrow



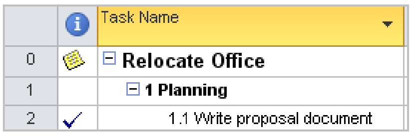
- Click the **Advanced Properties** button

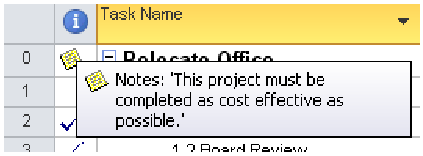




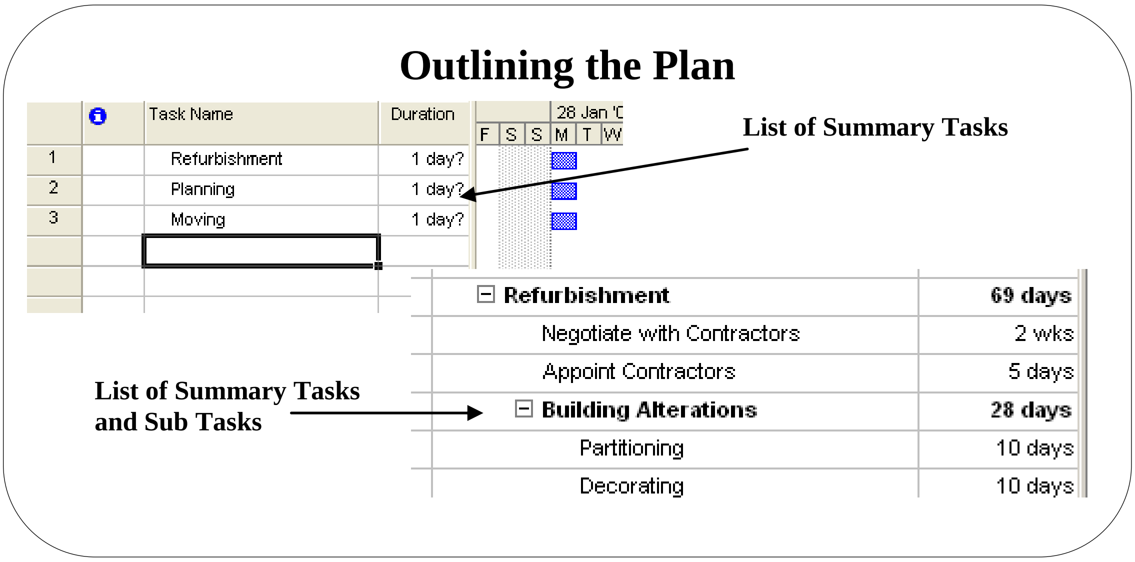
- When you enter data such as your **Manager's name** you can have this appear on headers or footers when you print your project out. The **Categories** and **Keywords** section can be useful when searching for a particular project. The **Comments** section is displayed on your Project screen as a Note.

Below left shows how the information entered above in the Project Title and Comments section would look in your project.





Above right shows how the information would look when your mouse pointer rests over the task note.

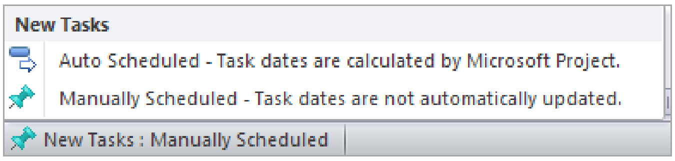


Outline the Plan

Background

We are now ready to enter our project outline and add **Summary Tasks** first and then **Sub Tasks**.

In this version of Project the default scheduling has changed from Automatic Scheduling to Manual Scheduling. In previous versions of Project, many users found it difficult to control how tasks were scheduled so for this reason Microsoft has changed the option to make it easier to control task scheduling



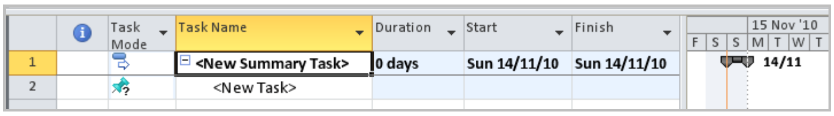
We will stick with the default for now but will explain the difference between the two a little later in this manual.

Outline the Plan Manual Scheduling (The default)

- Click in the first empty cell under the **Task Name** field in the **Gantt Table.**
- Type the name for your task and press **Enter**
- Type the second task name and repeat as above
- No Duration or Start Date is inserted into your project, just the name of the task.

Inserting a Summary Task with Manual Scheduling

- Click in the Task Name cell you want to add the Summary Task to
- From the **Task** tab and the **Insert** group of buttons
- Click **Summary**  button

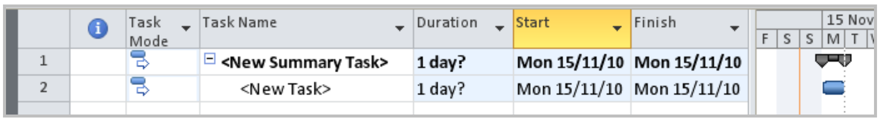


- A new Summary task will be inserted complete with 0 days duration and a Start and Finish field of the current date. Underneath the Summary task is a new task also. On the Gantt Chart a new Summary Bar is inserted. Notice that the New Summary Task has Auto Schedule while the New Task has Manual Schedule.
- Enter the name of the Summary Task and the New Task

Inserting a Summary Task with Auto Scheduling

- Click in the Task Name cell you want to add the Summary Task to
- From the **Task** tab and the **Insert** group of buttons
- Click **Summary** 

button



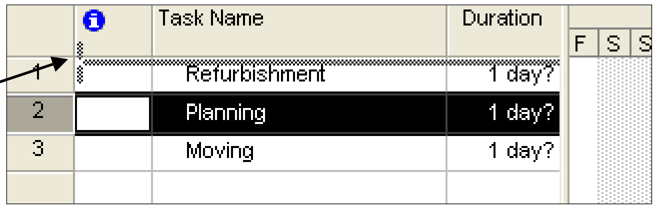
- A new Summary task will be inserted complete with 1 days duration and a Start and Finish field of the current date. Underneath the Summary task is a new task also. On the Gantt Chart a new Summary Bar is inserted. Notice that the New Summary Task and the New Task has Auto Schedule.
- Enter the name of the Summary Task and the New Task

Moving Items

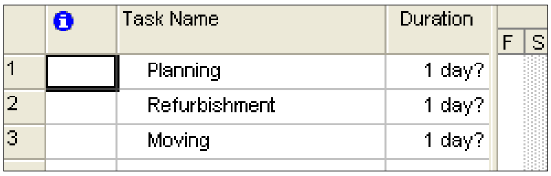
The plan is not as well organized, as it should be. The **Planning** stage ought to come before **Refurbishment**. We shall therefore use the **drag-and-drop-** feature to reorganize the outline.

- Click on ID number 2 for Planning and let your mouse button go.
- This selects the task row that we wish to move.
- You should see a 4 headed arrow when you place your mouse pointer back over the task ID number
- Click-and-drag on until the **Edit** bar is above row 1.

Click and Drag to here

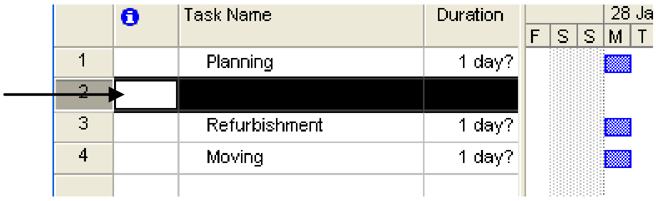


Your Project would now look like the one below.



Inserting a Task

- **Select where you want the new row**
- **Either press Insert on the keyboard**
- **Or Insert, New Task from the drop down menu**



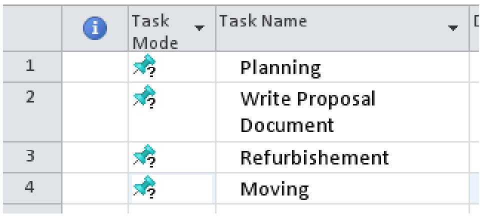
Inserting a Task

Background

When you choose **Insert, New Task**, a blank row is inserted *above* the current cursor position. In the illustration above, we inserted a task in the Planning phase.

To insert a new task

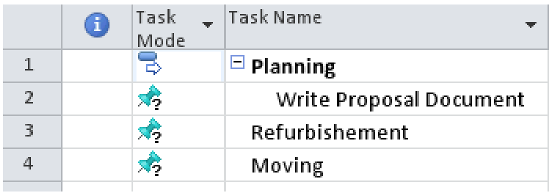
- Click **ID number 2, Refurbishment**
- From the **Task** tab and the **Insert** group of buttons, select **Insert Task** button
- Click in the empty **Task Name** box
- Type **Write proposal document** and click press **Enter**



To indicate that this is a task within the Planning phase.

- On the **Task** tab and the **Schedule** group of buttons, select **Indent Task** button

Notice how the task is now indented from the left margin and **Planning** becomes a **Summary Task** with Bold text and a different Gantt symbol. ***(Here we have also widened out the column by placing the mouse on the line between the Task Name field and the Start field, then dragging out)***



TIP: If you indent an item too far, use **Outdent** to move it back to the left. Notice also that a special mouse tool can be used at the beginning of each task name cell to *drag* tasks across the row to **Indent** or **Outdent**.

Inserting a Group of Tasks

Click on the first ID number and drag with the mouse over 2 rows, press Insert on the keyboard

		Task Mode	Task Name
1			⊟ **Planning**
2			Write Proposal Document
3			Refurbishement
4			
5			
6			
7			Moving

Inserting a Group of Tasks

Background

We could now insert three tasks within the **Refurbishment** phase and indent them.

To insert a group of tasks

- Click on task **ID 4** and drag over the next three rows and press **Insert** on the keyboard. (*see results above*).
- Click in the empty **Task Name** box type **Building Works** and press **Enter**
- Click in the empty **Task Name** box
- Type **Negotiate with contractors** and press **Enter.**
- Type **Appoint contractors** and press **Enter.**

		Task Mode	Task Name
1			⊟ **Planning**
2			Write Proposal Document
3			Refurbishement
4			Building works
5			Negotiate with Contractors
6			Appoint Contractors
7			Moving

- Select the three task rows in the Task Table in the top pane (*Row ID's 4,5 and 6)*
- On the **Task** tab and the **Schedule** group of buttons, select **Indent Task** button

Notice how **Refurbishment** becomes a summary task.

		Task Mode	Task Name
1			⊟ **Planning**
2			Write Proposal Document
3			⊟ **Refurbishement**
4			Building works
5			Negotiate with Contractors
6			Appoint Contractors
7			Moving

Delete the Whole Task

- Click on the **ID number** of the task and press **Delete** on the keyboard
- The whole line will be deleted

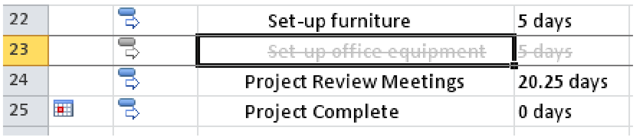
Delete just the Task Name

- Click on the **Task Name** and press **Delete** on the keyboard
- Just the Task Name will be deleted

Inactivate a Task (Project Professional Only)

Let's say you want to cancel a task but want to keep a record that the task was in the project. If you delete the task, its gone. Now you can *Inactivate* the task.

The task does not effect but does not affect how other tasks are scheduled. Nor does it effect .resource (resources: The people, equipment, and material that are used to complete tasks in a project.) availability or the project schedule (schedule: The timing and sequence of tasks within a project. A schedule consists mainly of tasks, task dependencies, durations, constraints, and time-oriented project information.).



Note: You cannot Inactivate a task in Compatibility Mode as this feature is not supported in earlier versions of Microsoft Office Project.

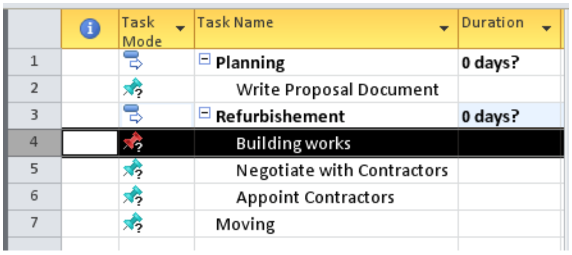
- Click on the **Task Name**
- From the **Task** tab, select the **Schedule** group of buttons
- Then click the **Inactivate** 

 button
- The task will *grey* itself out and have a *strikethrough* through it

Cutting and Pasting

- **Select the ID number of the task**
- **Click the Copy button to copy the task**

- **Or click the Cut button to cut the task**



		Task Mode	Task Name	Duration
1			Planning	0 days?
2			Write Proposal Document	
3			Refurbishement	0 days?
4			Building works	
5			Negotiate with Contractors	
6			Appoint Contractors	
7			Moving	

Cutting and Pasting

Background

Using **Cut** and **Paste** commands on the **Edit** menu, you can move cells, rows or column of task or resource information within a table or between tables, or between projects.

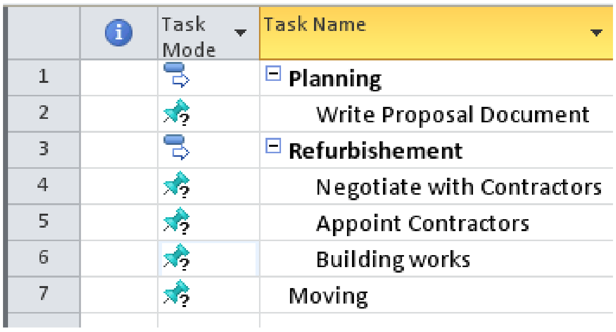
You can only move a contiguous range of cells, rows, or columns as a group; you cannot move a multiple selection.

You can cut and paste the entire task or cut and paste just the cell contents.

As an example, we shall use cut and paste via the Clipboard, to move the task **Building works** from row 4 to row 6, as this task will be performed once the Contractors are appointed. To select all the task details, that is, including its location in the outline, you must select the ID column rather than just the Task Name column.

To cut and paste task

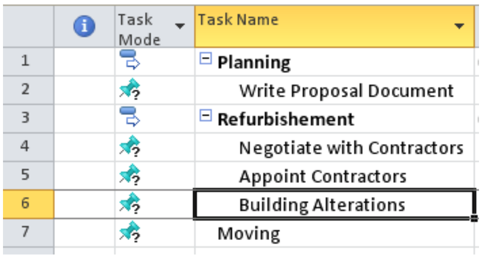
- Click on **ID 4** for **Building works**
- From the **Task** tab and the **Clipboard** group of buttons, select **Cut**
- Click **ID 6**
- From the **Task** tab and the **Clipboard** group of buttons, select **Paste**



		Task Mode	Task Name
1			Planning
2			Write Proposal Document
3			Refurbishement
4			Negotiate with Contractors
5			Appoint Contractors
6			Building works
7			Moving

Editing Text

- **Select the Task**
- **Press F2 on the keyboard**
- **Use Backspace and Delete keys**
- **Type new text**



Editing Text

Background

Text can be edited quite simply in the cell or you can use the **Entry Bar** which now is Not displayed by default. To display the Entry Bar, select the **File** tab, **Options**, then the **Display** section and tick the **Entry Box** tick box.

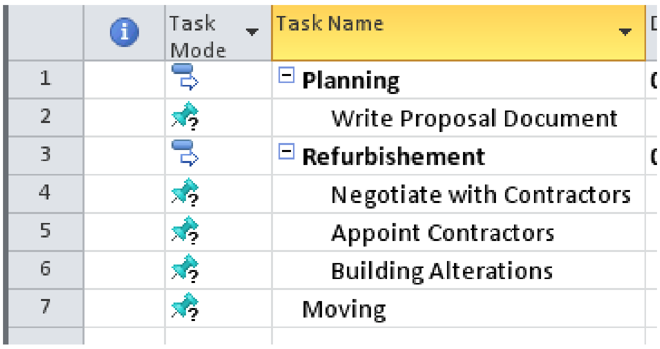
Edit Text

- Click on the task to be edited
- Press **F2** on the keyboard
- Use the **Backspace** and **Delete** keys to delete any text
- Type the new text and press **Enter**

In the above illustration we changed the task name **Building works** to **Building Alterations**

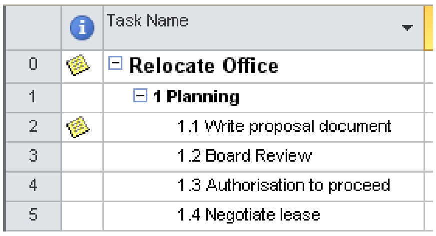
You can also edit text using the **Entry Bar**.

- Click on the task to be edited
- Press **F2** on the keyboard
- Click in the **Entry Bar**
- Use the **Backspace** and **Delete** keys to delete any text
- Click on the **Green Tick** to accept the changes



Task Notes

Task Notes Icon

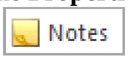


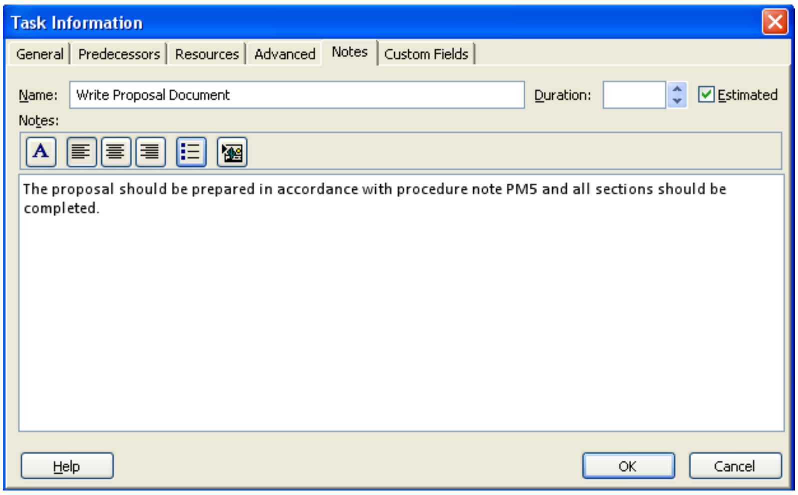
Task Notes

Background

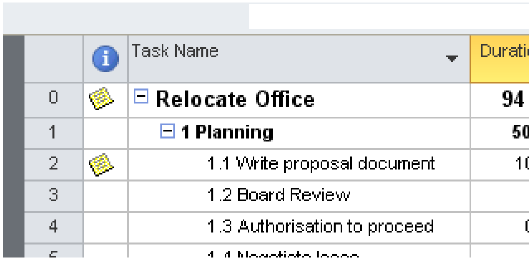
When outlining the plan it is important that you choose clearly understandable task names otherwise you will fail to communicate your requirements. A useful aid is the **Task Note** feature that allows you to attach a note to each task. This can contain a useful reminder or a list of specific deliverables or products that the task must produce. We shall attach a note to the **Prepare proposal document** task.

To add Task Notes

- Click on the Task to which you wish to attach the note
- Click the **Task** tab, then the **Properties** group of buttons
- Click the **Task Note** icon 
- The **Task Information** dialog box will open



- Type your information in the white box
- If you require a different colour of text, select the text and click the **Font**  button
- To align the text click either of the **alignment**  buttons
- For bullet points click the **Bullet**  button
- To insert a logo or picture, text or any other object, click the **Insert Object**  button
- Click **OK**

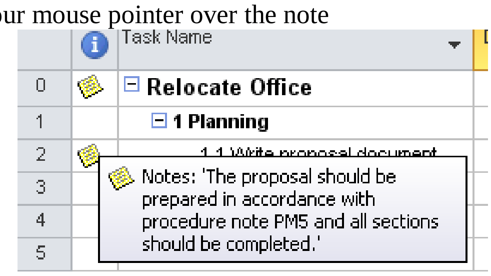


- Add any formatting you wish to the notes by clicking on the appropriate buttons within the Task Information dialog box. To add an object, click the **Insert Object** button. 

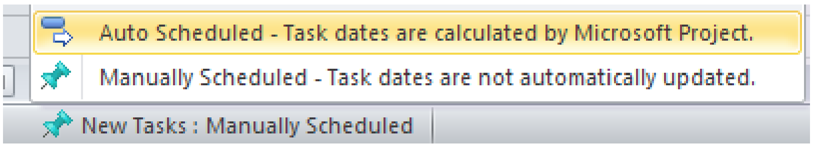
Notice the **Note** icon that appears in the Information column to indicate that a note is attached to the **Prepare proposal document** task. (see above).

To view the contents of the Task Note

- Rest your mouse pointer over the note



Manual Schedule Vs Auto Schedule



The default scheduling is now Manual Scheduling. In earlier versions of Project the default was Automatic Scheduling

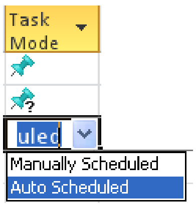
Manual Schedule Vs Auto Schedule

Background

In this version of Project the default scheduling has changed from Automatic Scheduling to Manual Scheduling. Many past Project users found it difficult to control how tasks were scheduled so for this reason Microsoft has changed the option to make it easier to control task scheduling. To switch between one and the other when commencing a project, click on the **New Tasks:** section on the bottom right of the screen on the **Status Bar**. You can always tell which option has been selected by the icon. Manual Schedule icon  looks like this and Auto Schedule icon  looks like this.

So what does all this mean? Basically, when you start a project you need to decide how you are going to schedule your tasks by default.

It can be changed later for either the whole project or selected tasks but you must start with one of them. If you want to change the scheduling for a specific task, in the **Task Mode** column click the drop down arrow and select **Manually Scheduled** or **Auto Scheduled**



As we work through this course we will continually be making reference to both types of scheduling to see how Project 2010 copes with scheduling our tasks! There is also a table on the next page which should help give information on Auto Schedule and Manual Scheduling.

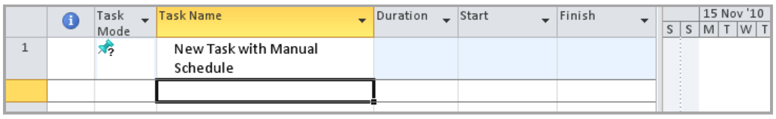
Manual Vs Auto Schedule Table

The following table shows how Project attributes are defined and used for scheduling manually and automatically scheduled tasks.

item	Manually Scheduled	Automatically Scheduled
Duration	Can be number, date, or text information, such as "14d" or "fortnight". Not used by Project to help schedule the project.	Only numbers representing time length and units can be used, such as "14d" or "2 months".
Work	Only numbers representing time length and units can be used, such as "14d" or "2 months".	Only numbers representing time length and units can be used, such as "14d" or "2 months".
Resources	Can be assigned to tasks. Not used by Project to help schedule the project.	Can be assigned to tasks. Used by Project to Help determine best schedule.
Start date	Can be a number, date or text information, such as "Jan 30" or "Sometime soon." Not used by Project to Help schedule the project.	Only date information can be used.
Finish date	Can be a date or text information, such as "Jan 30" or "Sometime soon." Not used by Project to Help schedule the project.	Only date information can be used.
Constraints	Ignored by Project.	Used by Project to Help determine best schedule.
Dependencies (links)	Can be used, but won't change the scheduling of the task.	Can be used, but won't change scheduling of the task.
Project and resource calendars	Ignored by Project.	Used by Project to Help determine best schedule

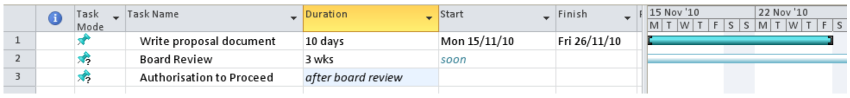
Manual Schedule

Manual Schedule means you have control over the tasks on the timeline and also how Project 2010 inserts the duration and start date of the task. Up until now we have been using **Manual Schedule** so that you can see all you need to do is enter the name of the task and the duration is left blank.



This option give you the opportunity to enter not only *numbers (i.e. 1 day, 2 weeks, 3 months, 1 year)* but you can also now type text like *After Board Approval* or *To be decided)* Notice also if you don't enter a Start Date the Gantt bar looks completely different. If you don't enter a duration or a Start Date there is ***NO*** Gantt bar at all!

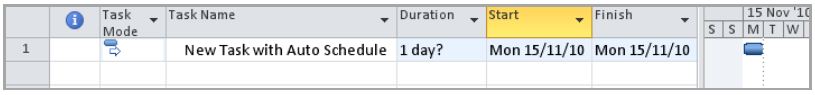
It should also be noticed that the Gantt bar looks different for each of the 3 options.



So if you are unsure of the duration or exactly when a task should start, this is a great option. You can go back at any time during the project to change the duration or start date when you know what they are.

Auto Schedule

If you switch this to **Auto Schedule**, you will see that the duration of the task is then populated with the default duration of 1 day? and a Gantt Bar is displayed on the Gantt Chart at the start date of the project. The Gantt bar is a blue colour which is a different colour when manual schedule is on.



If you try to write text like *soon* in the Duration field or the Start field when Auto Schedule is on you will see an error message.

To enter durations

At this stage we can enter durations or even estimated durations for the tasks and refine this information later when the resource information becomes available.

Our system options are set with days as the default duration unit. Other units may also be used in the plan but are entered as a suffix to their duration.

Suffix	Unit	Suffix	Unit
m	Minutes	**h**	Hours
d	Days	**w**	Weeks
mo	Months		
yr	Year		

- Locate the task you wish to add the duration to
- Click in the **Duration** box and type the number and one of the suffixes listed above
- Press **Enter**

i.e.Enter 1m = 1 Min, 1d = 1 day, 1h = 1 hour or 1w = 1 week, 1mo = 1 month, 1yr = 1 year. You can also enter 1.5h = 1½ hours or 2.5w = 2½ weeks.

To enter estimated durations

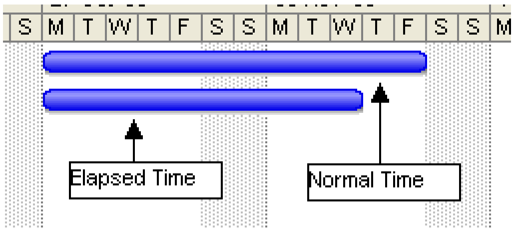
- Leave the duration at the default 1 day ? or as above but enter a question mark ? after the days, week etc.

To enter elapsed time durations

If the task is required to work throughout nonworking time such as holidays and weekends, use the **elapsed** time unites.

Suffix	Unit	Suffix	Unit
em	Elapsed Minutes	**eh**	Elapsed Hours
ed	Elapsed Days	**ew**	Elapsed Weeks
em	Elapsed Months		

See the illustration below of elapsed and normal time.

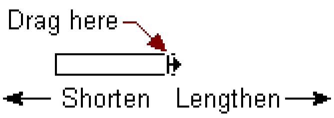


To edit durations

- Click on the **Duration** of the task and over type

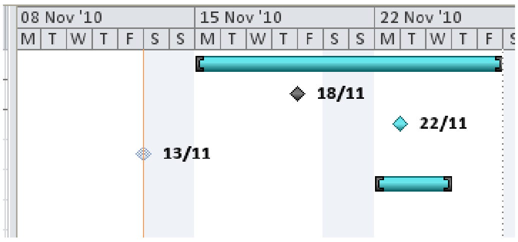
OR

- Using the mouse, place the mouse pointer over right-hand side of the Gantt bar. Drag to the right to lengthen the task or to the left to shorten the task.



Milestones

- **A marker point in your Project**
- **Displayed as a diamond shape**



Milestones

Background

A milestone is marker ◆ that you use to identify significant events in your schedule, such as the completion of a phase. When you enter a duration of zero days for a task, Microsoft Office Project 2010 displays the milestone symbol on the Gantt Chart at the start of that day. In this version of Project the milestone can be different colours depending on whether you use Manual or Auto Scheduling.

Alternatively you can show a Milestone marker ◆ instead of a Gantt Bar. This option does not alter the task duration but simply displays the bar differently in the Gantt Chart.

The picture above shows some of the tasks, which can be marked as a Milestone. Other examples are the **Start** of a project, the **End** of a project or a section that can be marked as completed i.e. the end of a **Phase**.

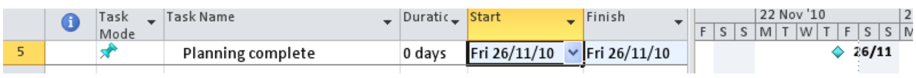
You should, however, know if you are Manually scheduling or Auto scheduling before you add any milestones as Project 2010 deals with both differently.

To enter a new milestone task with Manual Scheduling

- Select in the table where you require your new milestone task
- From the **Task** tab and the **Insert** group of buttons, click the **Milestone** 

 button
- On the table you will see where the new milestone task has been place

- Click inside and enter a name for the milestone
- In the Start column, enter the date for the milestone or leave it blank
- The milestone marker will appear on the Gantt chart.
- If you enter a date in the Start column you will see the milestone on the Gantt chart at that date but it will be a different colour



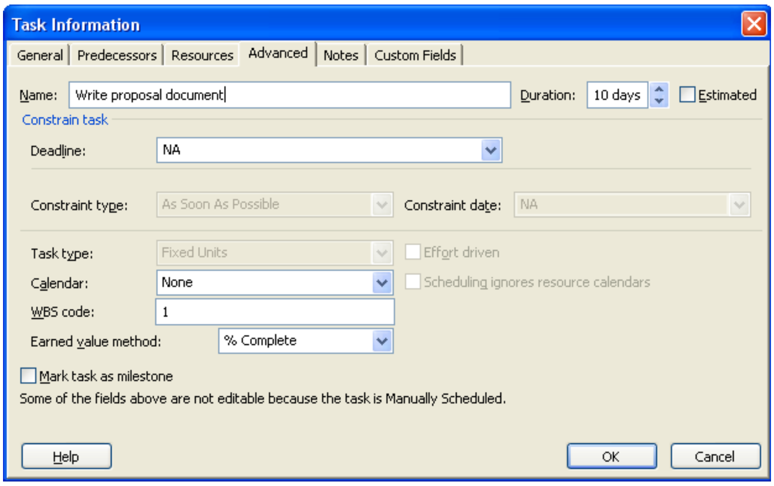
To enter milestones with 0 durations with Manual Scheduling

- Click on the duration for task
- Enter **0** (numerical 0) then press **Enter**

Notice the diamond symbol used to indicate **Milestone** events on the Gantt Chart.

To mark any task as a milestone with Manual Scheduling

- Double click on the **Task name**
- The **Task Information** dialog box is displayed
- Select the **Advanced** tab
- Click in the box **Mark task as milestone** tick box which is located at the bottom left of the window.



To enter a new milestone task with Auto Scheduling

- Select in the table where you require your new milestone task
- From the **Task** tab and the **Insert** group of buttons, click the **Milestone**  button

- On the table you will see where the new milestone task has been place

4		Negotiate Lease	3 days	Mon 22/11/10	Wed 24/11/10	
5		<New Milestone>	0 days	Sat 13/11/10	Sat 13/11/10	◆ 13/11

- Click inside and enter a name for the milestone
- In the Start column, it already has today's date but you can select any date
- The milestone marker will appear on the Gantt chart.

5		Planning complete	0 days	Sat 13/11/10	Sat 13/11/10	◆ 13/11

To enter milestones with 0 durations with Auto Scheduling

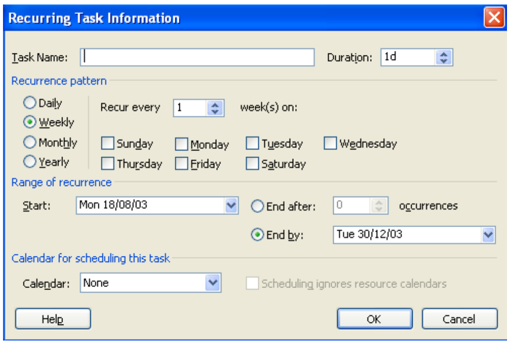
- Click on the duration for task
- Enter 0 (numerical 0) then press Enter

3		Authorisation to Proceed	0 days	Sun 14/11/10	Sun 14/11/10	◆ 14/11

Notice the diamond symbol used to indicate Milestone events on the Gantt Chart.

Recurring Tasks

- **Recurring Task – Task which happen on a regular basis**
- **From the Insert menu, select Recurring Task**



Recurring Tasks

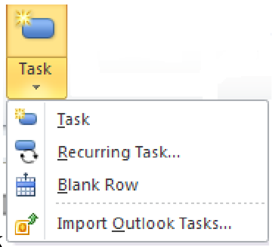
Background

A Recurring Task is a task that happens on a regular basis. Project Meetings for example. Another example could be deliveries, payments etc.

Note that these tasks are entered slightly differently! It makes no difference here whether the Recurring Tasks are scheduled Auto or Manual.

Insert a Recurring Task

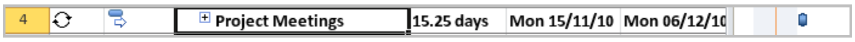
- Click in an empty **Task Name** cell
- From the **Task** tab and the **Insert** group of buttons, select, **Recurring**



Task button

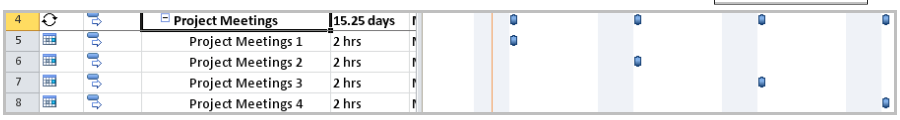
- The **Recurring Task Information** dialog box will appear *(see above)*
- Select from **Daily, Weekly, Monthly or Yearly**
- In the **Range of recurrence** section, select a **Start Date** and either an **End after** so many recurrences **OR**
- **End by** and enter a date.
- Click **OK**

In this project we have chosen **Monthly**.



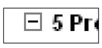
To Expand the meetings

- Click on the little plus sign to the left of the Recurring Task



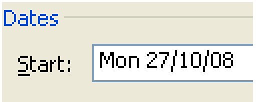
To hide the individual meetings

- Click on the little minus sign to the left of the Recurring Task

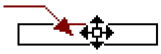


To change the day of each meeting

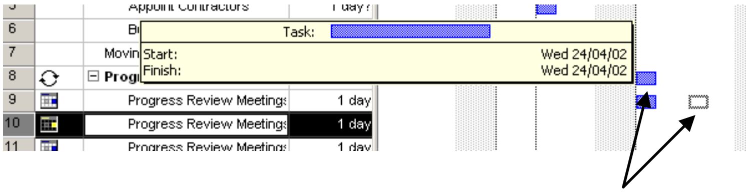
- Either **double click on the task name to invoke the Task Information** dialog box and in the **Start Date** box, enter the date required



- Click **OK**
- **OR**
- Rest your mouse pointer over the days Gantt Bar – you will see a 4 headed arrow



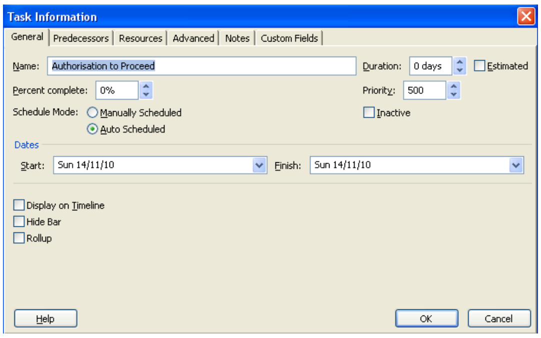
- Keeping your left mouse button down, drag to the correct date and let your mouse button go.



Meeting moved from here to here

Changing Task Information

- **Double click the Task Name OR**
- **Click on the Task Information Button**  **OR**
- **Press Shift + F2**



Changing Task Information

Background

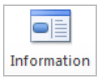
From time to time you may find it necessary to change your task information. One way to do this is through the Task Information dialog box. Basically, any box within the Task Information dialog box that has a white background, you can edit. For the present time, just use the **General** and **Notes** tabs, as we have not discussed Predecessors, Resources or Advanced features. We will look at these later in the course.

There are several ways to invoke this window.

Invoke the Task Information dialog box

- **Double click on the task**

OR

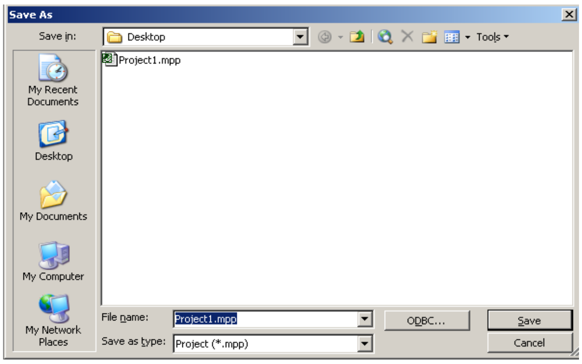
- Click on the task
- Click on the **Task** tab and from the **Properties** grou p of buttons, click the **Information**  button

OR

- Click on the task
- Press **Shift + F2** on the keyboard
- When you have finished editing, click the **OK** button

Saving the Project

- From the File tab, select Save or Save As
- Enter a suitable name for your Project and select where to save it to
- This version of Project does not ask to save a Baseline



Saving the Project

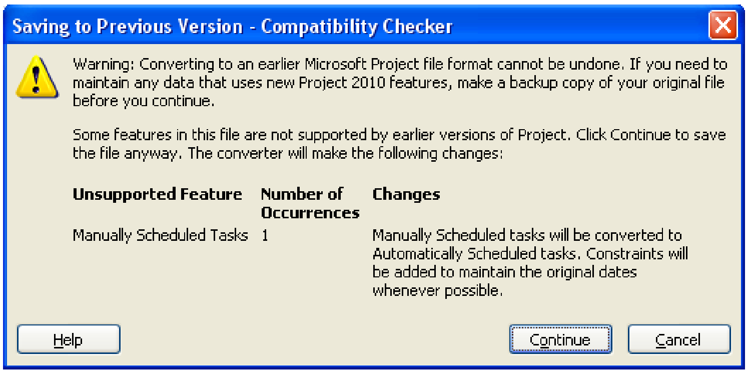
Background

You can save the project file at any stage by simply choosing **File** tab**, Save As**, just as you would with any other Microsoft application. Notice that the first time the project is saved a dialog box is presented for you to specify the file name, drive and directory details. Project 2010 is saved to its default 2010 but you can save in any of these file formats.

- Project 2007
- Project 2000 - 2003
- Portable Document Format (PDF)
- XML Paper Specification (XPS)
- Excel workbook
- Tab delimited text
- Comma delimited (CSV)
- XML

If you are using Project 2010 Professional you can also save to a Project Server or SharePoint Portal.

If you are saving your project to a backward file format liked 2007 or 200 – 2003 then some of the features in this version are not compatible. When you try to save a message similar to the following will be displayed.



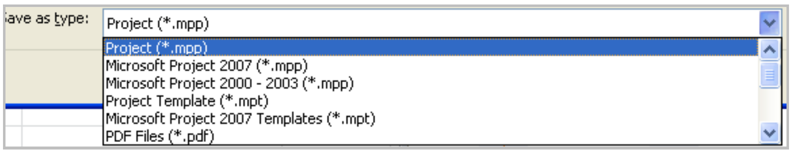
The Compatibility Checker will inform you of the unsupported features before you continue.

To save the project in the 2010 file format

- From the **File** tab, select **Save** or click on the **Save** button from the **Quick Access** toolbar
- Type the file name and select the drive and path.
- Click **OK**

To save the project in a different file format (Option 1)

- From the **File** tab, select **Save** or click on the **Save** button from the **Quick Access** toolbar
- Type the file name and select the drive and path.

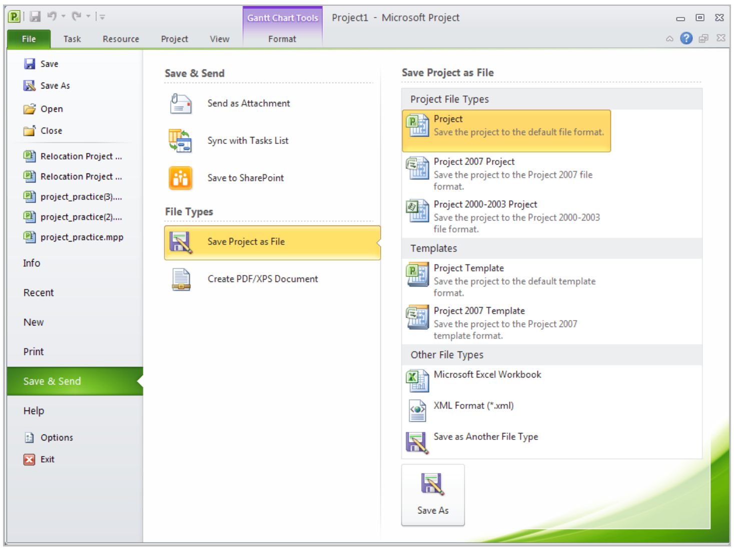


- Click **Save**.

When the file is saved, Project will add the default file extension **.mpp**.

To save the project in a different file format (Option 2)

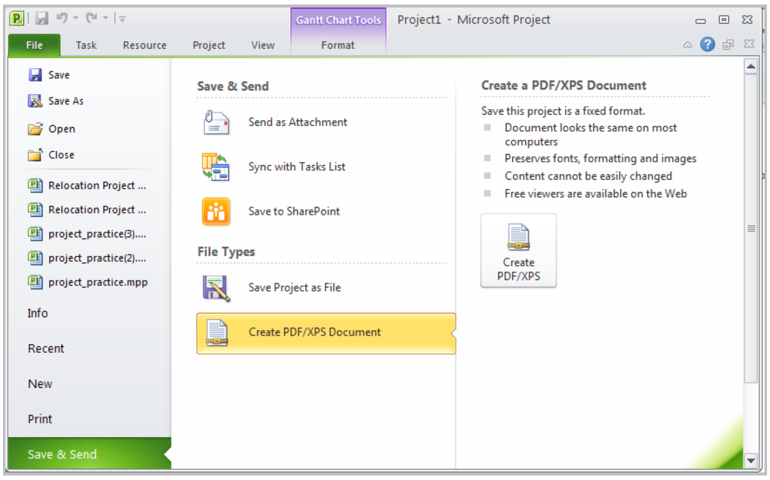
- From the **File** tab, select **Save & Send** or click on the **Save** button from the **Quick Access** toolbar
- Select **Save Project as File**



- The right hand side of the window will offer several ways to save your project. Select the option require.

Save the Project as a PDF or XPS

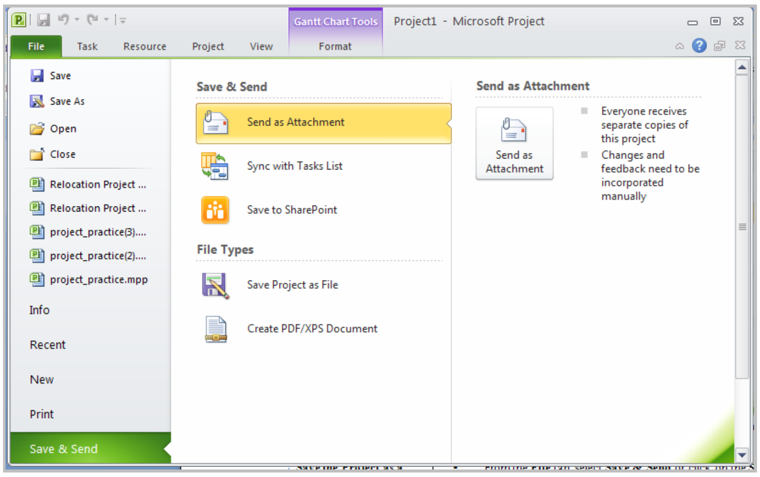
- From the **File** tab, select **Save & Send** or click on the **Save** button from the **Quick Access** toolbar
- Select **Create PDF/SPC Document**



- Click **Create PDF/XPS button**

Save the Project and send as an email attachment

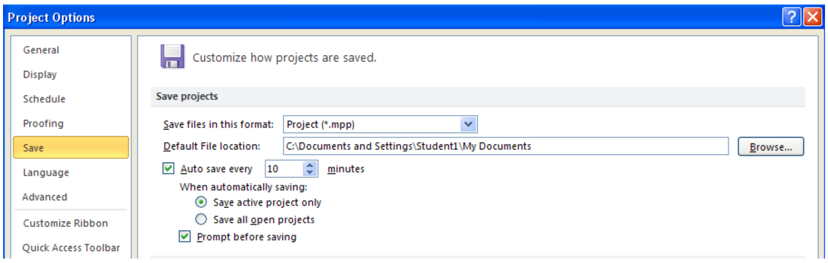
- From the **File** tab, select **Save & Send** or click on the **Save** button from the **Quick Access** toolbar
- Select **Send as Attachment**



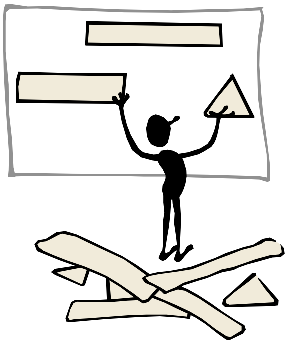
- Click the **Send as Attachment** button

To turn on AutoSave

- From the **File** tab, select **Options**
- From the **Options** window select **Save**
- Under the **Save Projects** section
- Click a tick in the check box next to **Auto save every**
- Enter the save duration in the box next door
- Specify whether you wish to save for the **Active Project Only** or **All Open Projects**.
- Tick the box **Prompt Before Saving** if you want notification of the save as it happens
- Click **OK**



Practice Session



Practice Session 3

This session is designed to give you a chance to put into practice the topics you have just been taught. You will create a new Project Plan and add the tasks and durations as indicated in the example. This project is based on relocating a small company to new premises.

(If you forget how to perform a particular action, the numbers in brackets identify the page numbers relating to the topic).

1. Before you start, ensure that Project has been closed down.
2. Ensure your whole project is Auto Scheduled *(Pg 56)*
3. Ensure you **Schedule from the Start Date** and give the date as **18th August 2003.** *(Pg 43)*
4. Display the **Properties** window *(Pg 45) and* enter the Project title as **Relocate Office**.
5. Enter your name as the Author and your Company name.
6. In the **Comments** section, enter the text: **This Project must be completed as cost effective as possible**.
7. Click **OK** to close the **Properties** window.
8. Show the Project Summary Task, **Relocate Office.** *(Pg 45)*
9. From **Project** tab**,** select **Change Working Time**, change the Base Calendar to reflect the following holidays. *(Pg40)*

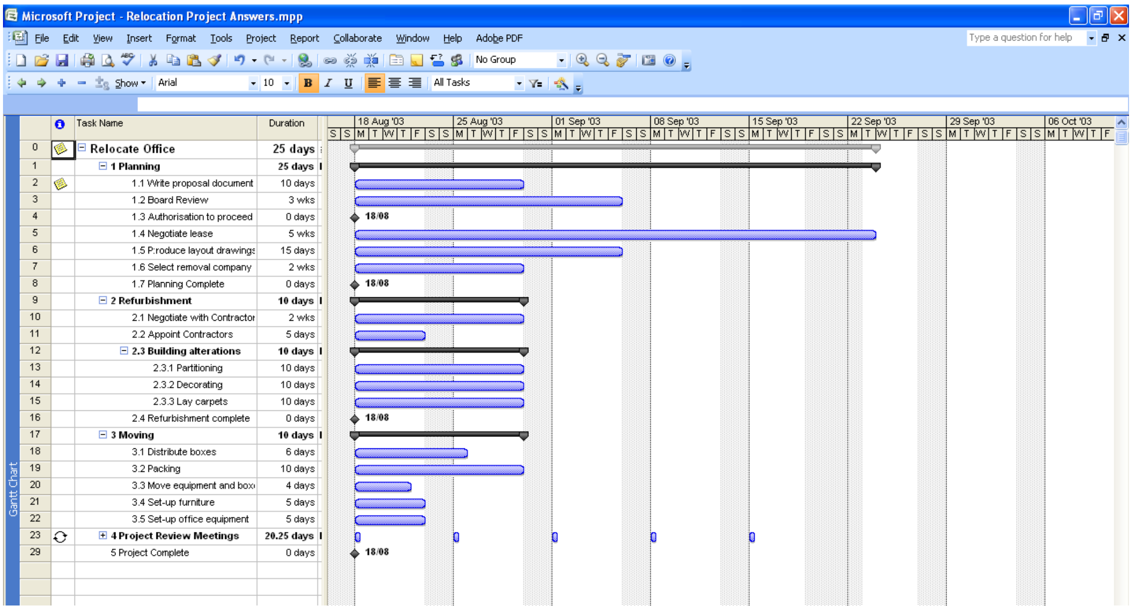
Name of Holiday	**Date of Holiday**
August Break	4th August 2003
Sept Break 1	19th September 2003
Sept Break 2	22nd September 2003
Christmas Hols	25th & 26th December 2003
End of Year	31st December 2003

10. From the table given below, enter the Task Name and Durations into Project. *(Pg 47, 58)*

Man or Auto Scheduled	Task Name	Duration
Auto	**Planning**	
Auto	Write proposal document	10 days
Auto	Board Review	3 weeks
Auto	Authorisation to Proceed	Milestone (0 duration)
Auto	Negotiate Lease	5 weeks
Auto	Produce layout drawings	15 days
Auto	Select Removal Company	2 weeks
Auto	Planning Complete	Milestone (0 duration)
Auto	**Refurbishment**	
Auto	Negotiate with Contractors	2 weeks
Auto	Appoint Contractors	5 days
Auto	**Building Alterations**	
Auto	Partitioning	10 days
Auto	Decorating	10 days
Auto	Lay carpets	10 days
Auto	Refurbishment Complete	Milestone (0 duration)
Auto	**Moving**	
Auto	Distribute Boxes	6 days
Auto	Packing	10 days
Auto	Move equipment and boxes	4 days
Auto	Set-up furniture	5 days
Auto	Set-up office equipment	5 days
Auto	**Project Review Meetings (see below for scheduling)**	2hrs
Auto	**Project Complete**	Milestone (0 duration)

1. Project Review Meetings should be scheduled every **Monday** for **5 weeks** *(Pg 62)*
2. Ensure you have indented the necessary Sub Tasks *(Pg 36)* and enter the Milestones *(Pg 60)*
3. Show the **WBS Codes** next to the **Task Name**. *(Pg 14)*
4. Insert a **Task Note** against the task called **Write Proposal Document** which states: **The proposal should be prepared in accordance with procedure note PM5 and all sections should be completed**.
5. Save your project and name it **My Relocation Project**. *(Pg 66)*
6. Practice showing and hiding your sub tasks.

The completed project is shown below. The answers are in **Relocation Project Answers.**

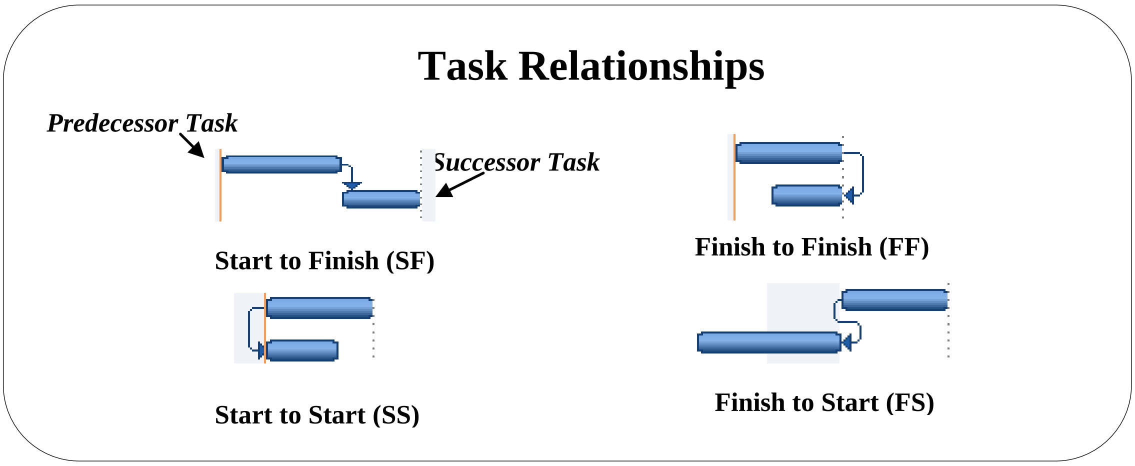


Task Dependencies

Learning Module Objectives

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

- Link Tasks using Dependency Link Lines
- Enter Lag and Lead time
- Split tasks
- View Critical Tasks and the Critical Path
- Understand Free Slack and Total Slack
- Search for and understand Slack time
- Constrain Tasks and set Deadlines



Task Relationships

Background

Tasks that are dependent upon each other should be linked using Dependency Link Lines. Once linked, Project will place the Gantt Bar into the correct timescale in your Project and also be able to better monitor any changes you make later by displaying the **Planning Wizard** and giving you options.

There are four types of dependency links. The most common one (which Project uses by default) is the Finish-to-Start link.

The above diagram displays the four dependency links and how they would look in your schedule on the Gantt Chart if using Auto Schedule. The Gantt Bars will look slightly different in colour and shape if you are using Manual Schedule but the principle is the same. The dependency link lines can be customized by selecting **Format, Layout**.

It also depends whether you are Manual Scheduling or Auto Scheduling as to how the Gantt bars behave when you link them. For example, if you have entered text in the duration column there will be no Gantt bars to link to!

Relationship	Description
Finish-to-Start (FS)	The later task (successor) cannot start until the earlier task (predecessor) has finished.
Start-to-Start (SS)	The two tasks start at the same time.
Finish-to-Finish (FF)	The two tasks finish at the same time
Start-to-Finish (SF)	The task finishes when its predecessor starts. (Not used very often).

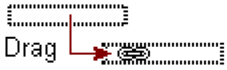
Predecessor Tasks and Successor Tasks

When you have two tasks that are related, the task that occurs in the project, first is the **Predecessor** task. The task, which occurs next, is the **Successor** task. Have a look at the illustration above.

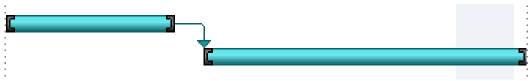
To link tasks using a finish-to-start dependency using the mouse and Manual Scheduling

There are many ways to link tasks with dependency links. This is just one of them.

- Lets say you wanted to link Task 2 to Task 3 in the Office Relocation Project with a Finish to Start dependency. This is how you would complete it.
- **Place your mouse pointer over Task 2 in the Gantt Chart.** Look for the four-headed arrow.
- When you see the four-headed arrow, hold down your left mouse button and drag over **Task 3** Gantt Bar



- Release the mouse button



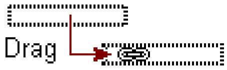
- Your Gantt bars should look like this.

NOTE: You can also link tasks, using this method, which are not adjacent to each other.

To link tasks using a finish-to-start dependency using the mouse and Auto Scheduling

There are many ways to link tasks with dependency links. This is just one of them.

- Lets say you wanted to link Task 2 to Task 3 in the Office Relocation Project with a Finish to Start dependency. This is how you would complete it.
- **Place your mouse pointer over Task 2 in the Gantt Chart.** Look for the four-headed arrow.
- When you see the four-headed arrow, hold down your left mouse button and drag over **Task 3** Gantt Bar



- Release the mouse button

- Your Gantt bars should look like this.

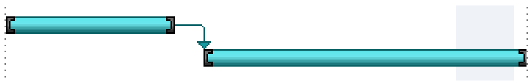
NOTE: You can also link tasks, using this method, which are not adjacent to each other.

To link tasks using a finish-to-start dependency using the Gantt Table and Manual Scheduling

- In the **Task Table** click on the required **Task Name** and drag the mouse over the next **Task Name**
- The two Task Names will become selected

2		Write Proposal Document	10 days
3		Board Review	3 wks

- Click on the **Link Tasks** button  or use **Ctrl+F2** keys on the keyboard

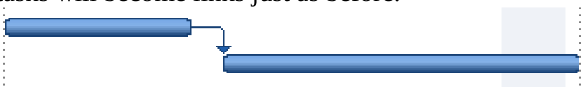


- The two tasks will become links just as before.

To link tasks using a finish-to-start dependency using the Gantt Table and Auto Scheduling

- In the Task Table click on the required Task Name and drag the mouse over the next Task Name
- The two Task Names will become selected

- Click on the Link Tasks button or use Ctrl+F2 keys on the keyboard
- The two tasks will become links just as before.



Link Tasks which are not continuous

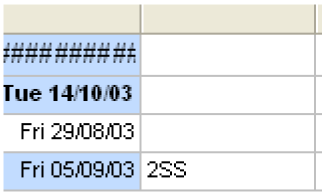
- In the **Task Table** click on the first required **Task Name**
- Hold down the **Ctrl** key on the keyboard and click on any other task you with to link to
- Click on the **Link Tasks** button or use **Ctrl+F2** keys on the keyboard

To remove a dependency link and Manual Scheduling

- Double click on the link line between the tasks to invoke the **Task Dependency** dialog box
- Click the **Delete** button

OR

- Scroll to the Predecessor field
- Click on the dependent task
- Press **delete** key on the keyboard



OR

- Select the relevant tasks in the Gantt Table using the **CTRL** or **Shift** keys
- Click on the **Unlink Tasks** button or use **Ctrl+Shift+F2** keys on the keyboard
- Notice that the two Gantt bars stay where they are on the timeline.

To remove a dependency link and Manual Scheduling

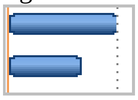
- Double click on the link line between the tasks to invoke the **Task Dependency** dialog box
- Click the **Delete** button

OR

- Scroll to the Predecessor field
- Click on the dependent task
- Press **delete** key on the keyboard

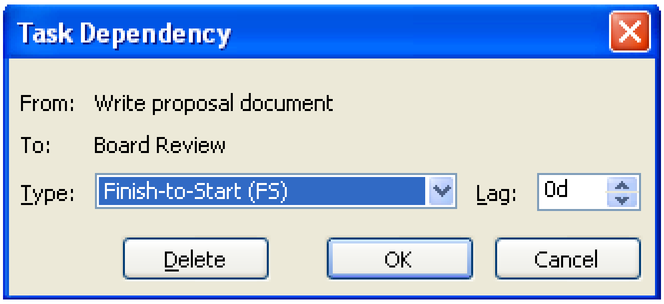
OR

- Select the relevant tasks in the Gantt Table using the **CTRL** or **Shift** keys
- Click on the **Unlink Tasks** button  or use **Ctrl+Shift+F2** keys on the keyboard
- Notice that the two Gantt bars go back to their original place on the timeline.



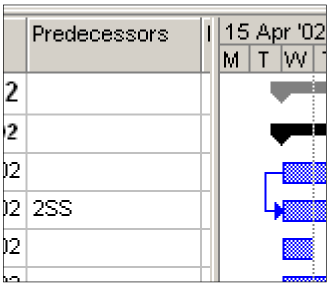
To change the dependency between linked tasks

- Double click on the link line between the tasks to invoke the **Task Dependency** dialog box
- From the **Type** section, click the drop down arrow and select the dependency type required.
- Click **OK**

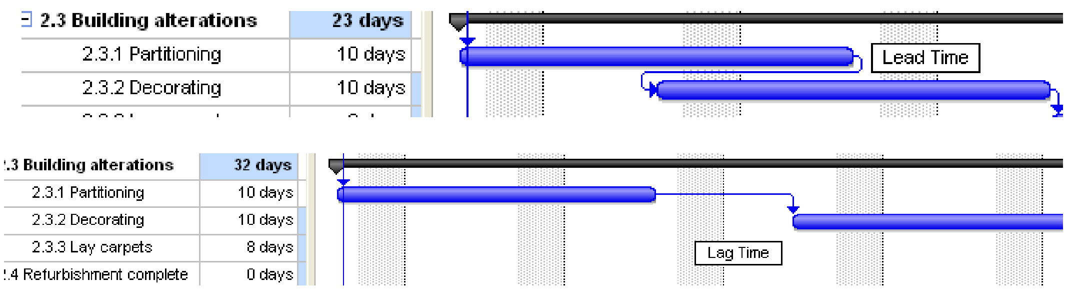


OR

- In the **Gantt Table** scroll along to the **Predecessors** field
- Type the **Predecessor** number and the **Dependency Link** required
- Press **Enter**
- The Gantt Chart will be updated with the link



Lag Time and Lead Time

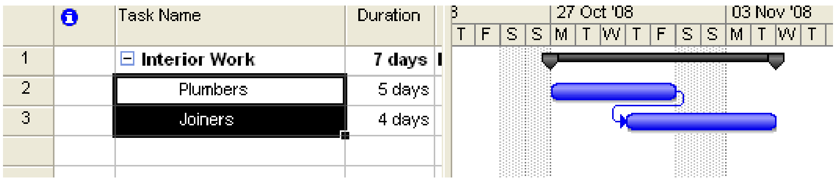


Lag Time and Lead Time

Background

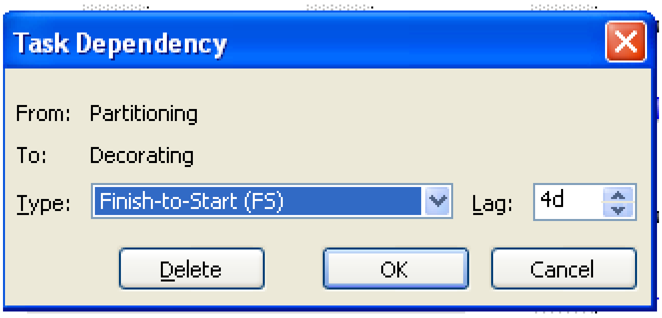
Entering **Lag** (+) or **Lead** (-) time along with your dependency link lines allows you to put controls into the project. For example, think about plastering a wall. When the plastering task is finished, could you immediately paint the wall? The logical answer is no. You need to leave a couple of days for the wall to dry. This is known as **Lag** time. Some people prefer to use the terms **Plus Lag** or **Minus Lag**. This option is one of the best ways to save time in your project. This is how the Gantt Chart would look in your project.

Lead time on the other hand is an overlap of your tasks. This is very good for shortening your schedule. For example, let's say that you are building a house and your task for plumbers will take 3 weeks and the task for your Joiners will take 3 weeks. That is a total of 6 weeks, which is quite a long time. If you want to shorten this period of time to say 3 to 4 weeks, then allow for **Lead** time. This is how the Gantt Chart would look in your project.



To allow for Lag time

- Double click on the link line between the tasks
- This will invoke the **Task Dependency** dialog box
- In the **Lag** section, enter the number of days, weeks etc
- Click **OK**

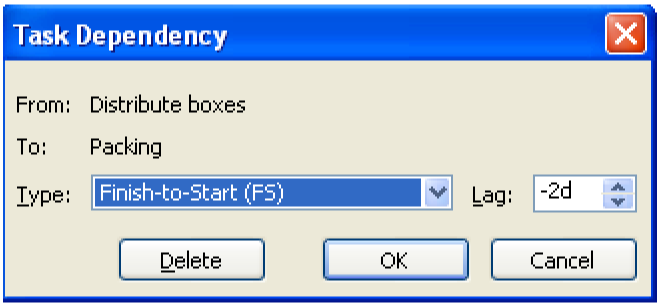


In the example above we have given 4 days of lead time between the task Partitioning and Decorating.

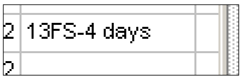
NOTE: If you have trouble double clicking on the link line, try adding or changing Lag or Lead time using the Predecessors field.

To allow for Lead time

- Double click on the link line between the tasks
- This will invoke the **Task Dependency** dialog box
- In the **Lag** section, either type the Lag time you wish or use the downward spinner. (*Remember this is a negative number*).
- Click **OK**

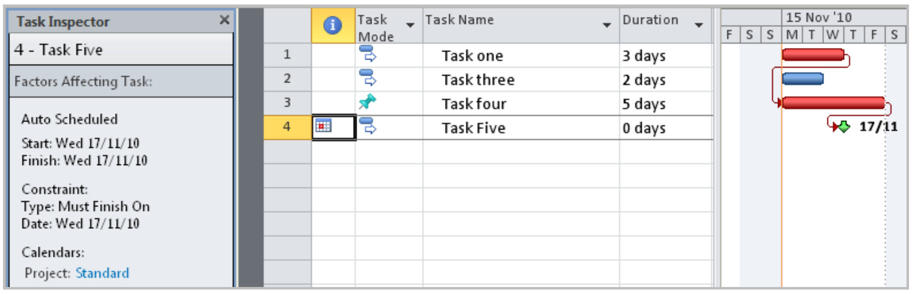


NOTE: If you have trouble double clicking on the link line, try adding or changing Lag or Lead time using the Predecessors field.

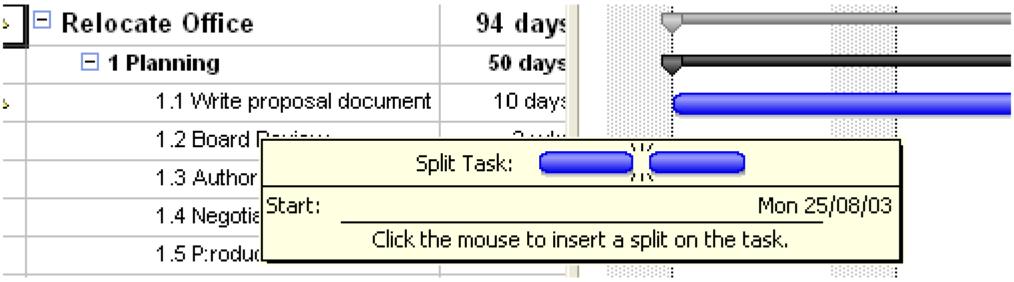


Task Drivers

Task Drivers is a new feature and replaces the Task Driver in Project 2007 and is used to see what constraints a task has that drives the task's start date.



Splitting Tasks



Splitting Tasks

Background

If you wish to schedule a task more than once and perhaps for different durations on each occasion, then the **split** task method is very convenient where the detail is stored as one task. This option also helps when you have a resource with 2 tasks to complete at the same time frame, which we shall discuss later.

To split a task with Manual Scheduling

- On the **Task** tab and the **Schedule** group of buttons, click **Split Task**

- Move the pointer over the task you wish to split

- Drag the split to start on the required date.

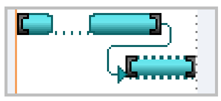
- A dotted line indicates where a task has been split, and that it can be split more than once.

The duration of the task will be the same. In the illustration above 2 weeks but the task will finish later than you originally planned.

NOTE: If you split the task as the wrong position you can rejoin the task by pointing at the second part of the task and drag it back to join the first part.

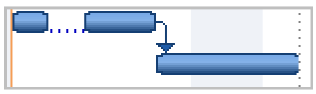
To split a task with Manual Scheduling

- When you use Manual Scheduling your split task will look like this

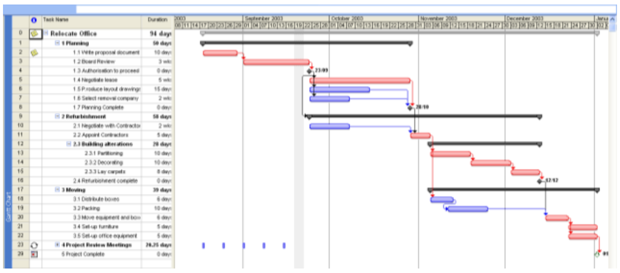


To split a task with Auto Scheduling

- When you use Manual Scheduling your split task will look like this



Critical Tasks and the Critical Path



A Project showing critical tasks and the critical path

Critical Tasks and the Critical Path

Background

In your project you may have one or more tasks that are **Critical**. A Critical Task is a task that will not allow any other tasks to be completed before it is completed itself. Also if you estimate the duration wrongly the project end date will either be later or sooner than originally anticipated.

As the Project Manager, it is important that you know which tasks are critical because when your project is up and running, these are the tasks you will need to concentrate on. You should ensure that they do start and finish when you originally planned if you want to project to be completed on time.

You can define a Critical task with your use of logic. Let's say that you are building a new office block and one of the tasks is Set Foundations. You cannot build the walls until the foundations are set! If the foundations take longer than anticipated, the end date of the project goes further through time. If on the other hand the foundations take less time, the end date of the project will be sooner.

The walls will also be a critical task because you cannot put on the roof until the walls are erected, and so on.

Project cannot define critical tasks in the way you can. Project will state that a task is critical by where it lies within the plan and what tasks are linked to and from it.

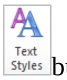
There are any many ways to see Critical Tasks in your project. You can apply a filter, change the view or turn the Gantt Table text red or the Gantt Chart bars red.

The use of **Constraints** will also determine whether Project the programme defines a task as critical. We will look at this a little later.

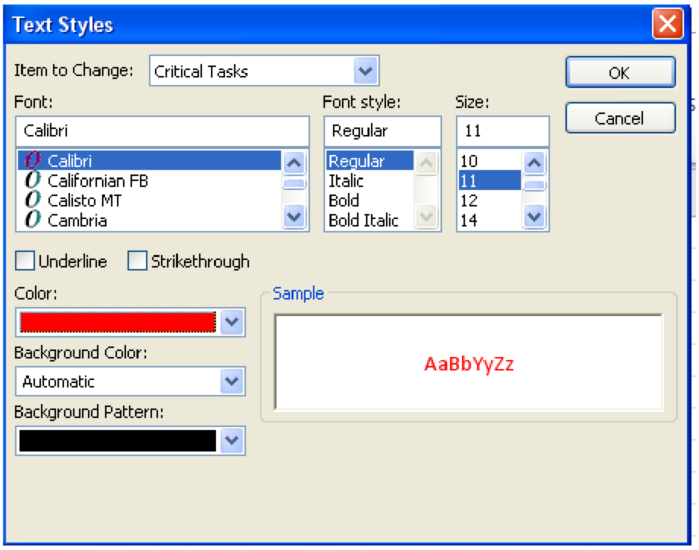
The **Critical Path** is identified by the critical tasks, which are linked to one another.

By default and by definition, a task with 0 slack is considered a critical task. If a critical task is delayed, the project finish date is also delayed.

To change the Gantt Table Text and background for Critical Tasks

- From the **Format** tab and the **Format** group, select **Text Styles** 

button
- **The Text Styles** dialog box will be displayed



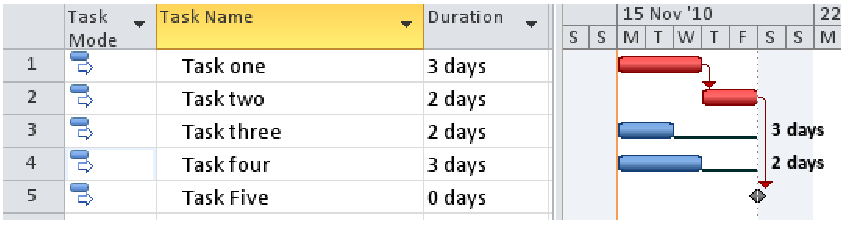
- Under the **Item to Change** section, click the drop down arrow and select **Critical Tasks**
- Change **Font, Font Style** and **Size** as necessary.
- Change the **Colour** to **Red**
- Change the **Background Color** and **Background Pattern** to suit
- Click **OK**

- Here we have changed the text to Red and the background to Yellow.

To turn the Gantt Bars red for Critical Tasks

- From the **Format** tab and the **Bar Styles** group, select **Critical Tasks**
- Your Critical Gantt bars will turn red i.e Gantt Bars with a Start to Finish relationship and have no slack time.

Free Slack and Total Slack



This view is the Detail Gantt View with the Table Delay

Slack Time

Background

When you plan your project and start then start to put it together you will have Critical and Non-critical Tasks.

The amount of time you can delay a non-critical task is called **Free Slack.** This is the amount of time a task can be delayed before its successor task is delayed. Use the Free Slack field to determine whether a task has any time available for a delay. This can be useful if a resource needs more time on a task, or if you want to assign a resource to another task. You can also use the Free Slack field to determine how to recover a schedule that's slipping.

Total Slack is the amount of time that the finish date of a task can be delayed without delaying the finish date of the project. Total slack can be positive or negative. If total slack is a positive number, it indicates the amount of time that the task can be delayed without delaying the project finish date. If total slack is a negative number, it indicates the amount of time that must be saved so that the project finish date is not delayed. Negative slack indicates that there is not enough time scheduled for the task and is usually caused by constraint dates.

For example, let's say that you have 4 tasks. Task 1 *(5 days duration, 8^{th} August – 12^{th} August)* is Critical and Task 4 *(5 days duration, 15th August – 19^{th} August)* is Critical and they are linked Finish to Start on the Critical Path. *(See illustration above).* Task 2 (*3 days duration)* and Task 3 *(2 days duration)* are non-critical.

Task 2 can be done anytime between the start of Task 1 and the end of Task 4; the difference in time between is 7 days. This is the Free Slack.

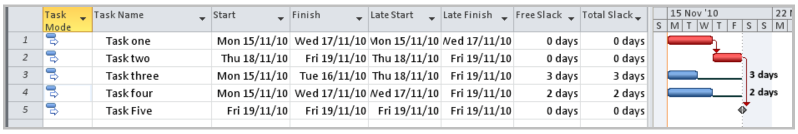
Similarly, Task 3 can be done anytime between the start of Task 1 and the end of Task 4; the difference in time between is 8 days. This is the Free Slack.

By default and by definition, a task with 0 slack is considered a critical task. If a critical task is delayed, the project finish date is also delayed.

Slack values can be used to show scheduling inconsistency. For example, a negative slack value occurs when one task has a finish-to-start dependency with a successor task, but the successor task has a Must Start On constraint that is earlier than the end of the first task. Negative slack can also occur when a task is scheduled to finish after its deadline date. *(See illustration on next page)*

To view Total Slack and Free Slack

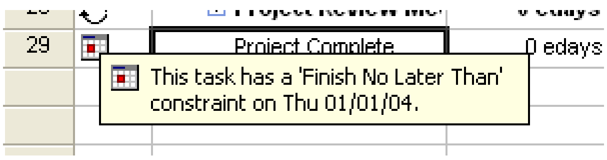
- From the **View** tab and the **Task Views** group of buttons
- Then select **More Views**
- Then select **Detail Gantt** view
- We will now change the table
- From the **View** tab and the **Data** group of buttons , select **Tables**
- Then select **Schedule**
- Drag the Vertical split bar back to see the fields



	Task Mode	Task Name	Start	Finish	Late Start	Late Finish	Free Slack	Total Slack
1		Task one	Mon 15/11/10	Wed 17/11/10	Von 15/11/10	Ned 17/11/10	0 days	0 days
2		Task two	Thu 18/11/10	Fri 19/11/10	Thu 18/11/10	Fri 19/11/10	0 days	0 days
3		Task three	Mon 15/11/10	Tue 16/11/10	Thu 18/11/10	Fri 19/11/10	3 days	3 days
4		Task four	Mon 15/11/10	Wed 17/11/10	Ned 17/11/10	Fri 19/11/10	2 days	2 days
5		Task Five	Fri 19/11/10	Fri 19/11/10	Fri 19/11/10	Fri 19/11/10	0 days	0 days

Note: By default and by definition, a task with 0 slack is considered a critical task. If a critical task is delayed, the project finish date is also delayed.

Entering Date Constraints



Entering Date Constraints

Background

For your own project you should consider just having the essential tasks ***constrained*** i.e. on the Project Complete task, or any other crucial task which must be either started, finished etc by a certain time. Some of the Constraints are *Flexible* and some are *Inflexible*. This is indicated with a *red* or *blue* dot on the symbol. **Constraints can only be set using Auto Schedule!**

These **Constraints** are there to control and ensure that certain key dates are achieved on the project. What you must also consider is the *'knock-on'* effect it will have on the subsequent tasks.

You can constrain the start or finish of tasks as follows:

This Constraint	Schedules the Task
As **L**ate **A**s **P**ossible (**ALAP**)	As late as possible without delaying subsequent tasks. Do not enter a constraint date with this constraint.
As **S**oon **A**s **P**ossible (**ASAP**)	To begin as early as possible. This is the default constraint for tasks. Do not enter a constraint date with this constraint.
Finish **N**o **E**arlier **T**han (**FNET**)	To finish on or after a specified date. Use this constraint to ensure that a task does not finish before a certain date.
Finish **N**o **L**ater **T**han (**FNLT**)	To finish on or before a specified date. Use this constraint to ensure that a task does not finish after a certain date.
Must **F**inish **O**n (**MFO**)	To finish on a specified date. Sets the early, scheduled, and late finish dates to the date you type and anchors the task in the schedule.
Must **S**tart **O**n (**MSO**)	To start on a specified date. Sets the early, scheduled, and late start dates to the date you type and anchors the task in the schedule.
Start **N**o **E**arlier **T**han (**SNET**)	To start on or after a specified date. Use this constraint to ensure that a task does not start before a specified date.
Start **N**o **L**ater **T**han (**SNLT**)	To start on or before a specified date. Use this constraint to ensure that a task does not start after a specified date.

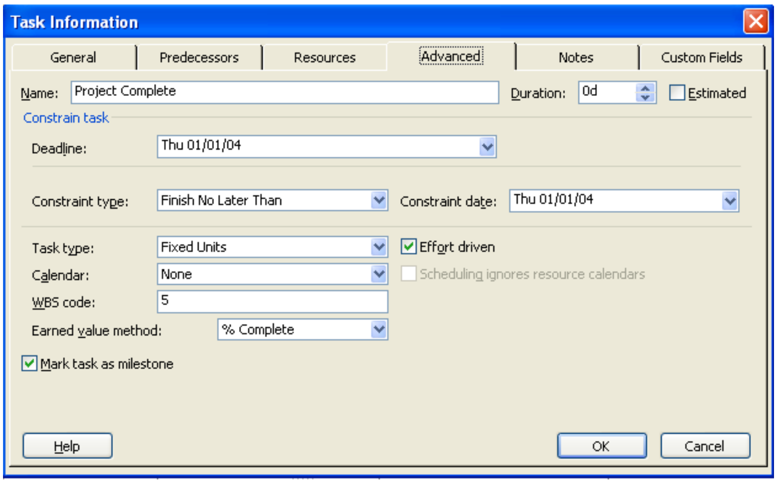
Column Indicators

This Indicator	Shows
Red dot	A task with an **inflexible** constraint: Finish No Earlier/Later Than (for projects scheduled from the finish/start date respectively) Start No Earlier/Later Than (for projects scheduled from the finish/start date respectively) Must Finish On (Any project)
Blue dot	A task with a **flexible** constraint: Finish No Earlier/Later Than (for projects scheduled from the start/finish date respectively) Start No Earlier/Later Than Than (for projects scheduled from the start/finish date respectively)
Exclamation	A task that has missed its constraint date
Deadline	A Task to which a Deadline has been added

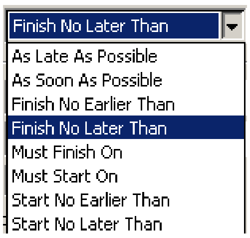
To Enter a Constraint

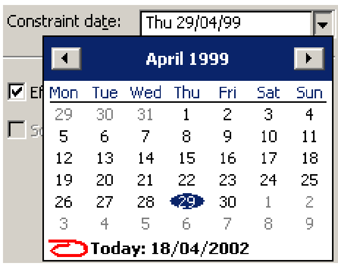
We could demonstrate this feature on **Project Complete**, a key milestone.

- Double click on the task you wish to add the constraint to
- This will invoke the **Task Information** dialog box



- Select the **Advanced** tab
- In the **Constraint type** section, click the drop down arrow next to **As Soon As Possible** and select **Finish No Later Than**





- In the **Date** box next to it, enter the date you wish.

- A constraint symbol will appear in the Indicators column.

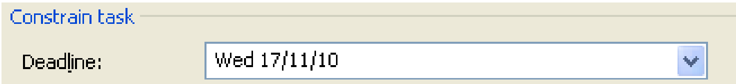
To Delete a Constraint

- Switch to the **Task Entry** view
- In the **Task Details Form** in the lower pane, use the **Previous** and **Next** buttons to select the task you wish to constrain.
- In the **Constraint** section of the **Task Details Form** click the drop down arrow next to **Start No Earlier Than** and select **As Soon As Possible**
- In the **Date** box underneath, delete the date using the delete key on the keyboard
- The constraint symbol will disappear from the Indicators column.

To Deadline a Task

You can add a Deadline symbol to your project at any time which is shown by a green .

- Double click the task to be deadlines
- The **Task Information** dialog box will be displayed
- Select the **Advanced** tab
- Under the **Constrain Task, Deadline** section, either type a date in the box or click the drop down arrow and choose a date from the calendar.
- Click **OK**



What happens if the constraint is not met

By default, Project assumes that the constraint will be met. If you change the duration of tasks above the Project Complete task you will notice that the **Planning Wizard** will may appear. This is Project's way of helping by offering you a number of suggestions. In the example below we have set a constraint of **Must Finish No Later Than 14 November**. Later we find that **Set-Up office equipment** will take 10 days instead of the original 5 days and we change it. The **Planning Wizard** offered us the option to Cancel, or to continue. We chose Continue. Look what happens to **Project Complete:**

Project has moved the Gantt bar for Set-Up office equipment so that it runs past the 14th November to 20th November. You might not notice this date changing in your own project.

Defining Recourses

Learning Module Objectives

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

- Add Resources to the Project
- Effort Driven scheduling
- Look at the Resource Sheet
- Change the Standard Project Calendar options
- Change the Standard Project Calendar to reflect non-working days
- Change a Resources Calendar to accommodate holidays
- Add a new Calendar for a Resource
- Use Organizer to copy, delete calendars

Adding Resources

- Can be a person like Joe Bloggs
- Can be a group of people like Admin Dept.
- Can be an outside contractor like ABC Builders
- Can be a material resource like paper, oil, concrete etc.

Adding Resources

Background

You may require other people to assist you with the tasks in your project. These could be an individual person *(Joe Bloggs)*, a group of people *(A Department)*or an outside contractor *(ABC Builders).* These are all **Work** resources.

In this version of Project you may even state a **Material** resource like Oil, Paper, Concrete and so on.

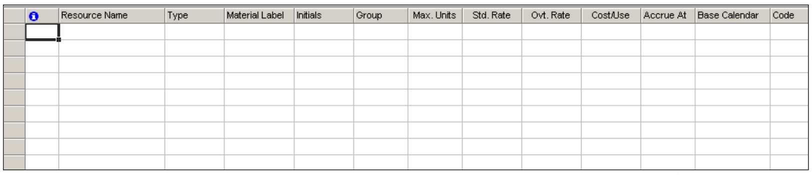
A new feature to Project 2010 is a **Cost** Resource. This is handy if you have any particular cost like Air Fares for a task.

The first step to allocating resources on a project is to define which resources, and what amount of these resources, are required to complete each task.

Enter Resources into the Resource Sheet (Option 1)

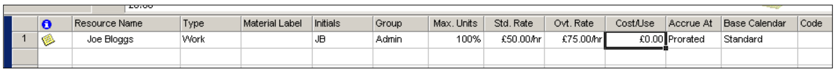
There are various ways of entering resource information in Project. In this section we will use the **Resource Sheet** to do this.

- Switch to **Resource Sheet View** using the **View** tab
- The **Resource Sheet** looks like the one below.



	Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar	Code

- Click in the **Resource Name** field and enter the name of your Resource
- As you enter the date, notice how the other fields are temporarily completed.



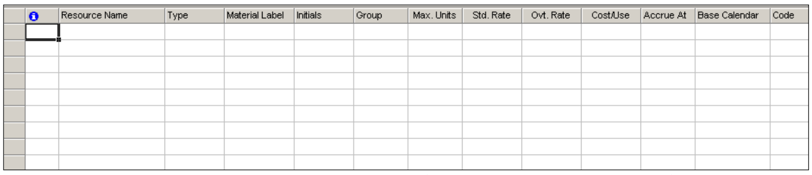
	Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar	Code
1	Joe Bloggs	Work		JB	Admin	100%	£50.00/hr	£75.00/hr	£0.00	Prorated	Standard	

- Press **Tab** to take you to the next field.
- Continue until all the information you require is entered.
- Switch back to the **Gantt Chart** when you are finished and wish to assign your Resources to their tasks.

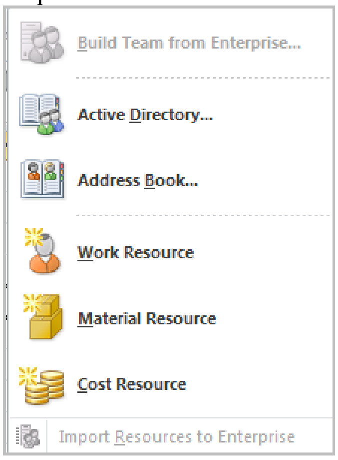
Enter Resources into the Resource Sheet (Option 2)

There are various ways of entering resource information in Project. In this section we will use the **Resource Sheet** to do this.

- Switch to **Resource Sheet View** using the **View** tab
- The **Resource Sheet** looks like the one below.

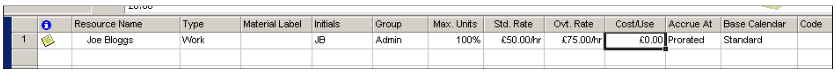


- Switch to the **Resource** tab and from the **Inert** group of buttons select the type of resource required



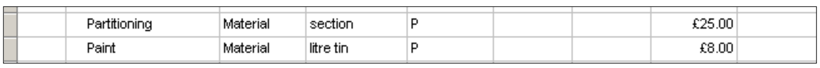
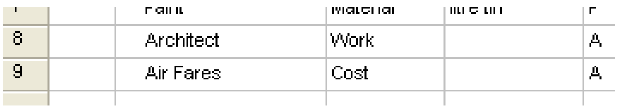
- The Resource Name field will look like the one below if you add a Word Resource

- Click in the **Resource Name** field and enter the name of your Resource
- As you enter the date, notice how the other fields are temporarily completed.



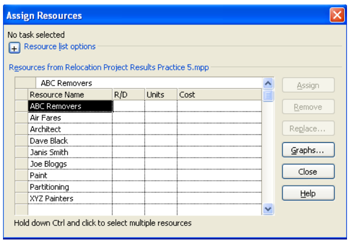
- Press **Tab** to take you to the next field.
- Continue until all the information you require is entered.
- Switch back to the **Gantt Chart** when you are finished and wish to assign your Resources to their tasks.

The table below gives information on each of the fields in the Resource Sheet.

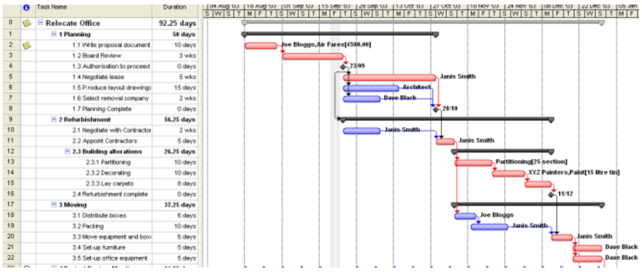
Field	Information
ID No	An automatic number project assigns to each Resource listed in sequential order as Resource is entered on this sheet
Indicators Column	Inserts objects like Resource Notes.
Resource Name	Name of the Resource i.e Joe Bloggs, Marketing dept. (If you are entering the full name of your resource, you may wish to enter you names with the surname first. Useful when sorting by Resource Name later)
Type	Either a Work type (person, dept) or a Material type (oil, paper), Cost (air fares)
Material Label	State how the material is packed i.e. ream of paper, litre of oil. (This field will only accept information when the Type field is set to Material)
Initials	Enter the Initials of your Resource. (You can later display the Resource Initials on your Gantt Chart instead of the full name to save space).
Group	State which Group your Resource belongs to i.e. Admin Dept. External etc.
Max. Units	Default is 100% which indicates that the Resource is able to work 100% of his time to any task given to him/her. If using an outside Contractor or Dept and they give you 6 people the units would be set to 600%. (100% per person)
Std. Rate	Enter the normal Standard Rate of pay for your Resource. Default is per hour but can be set to year, day, month, week by entering the number followed by / (forward slash) and the denomination i.e. 20000/yr for year,
Ovt. Rate	Enter the Overtime Rate for your Resource i.e. time and a half, double time etc. (Enter the number and denomination only)
Cost/Use	This field can be used instead of Std. Rate and Ovt. Rate and is a set fee the Resource is awarded for any task he/she is given. This is often useful if you are working to a tight budget.
Accrue At	When do you wish Project to calculate the rate of pay. Use the drop down to select from Prorated (default), start or end.
Base Calendar	Select from Standard, 24 hours or Night Shift using the drop down arrow. If you assign a new calendar to one of your Resources, you will see them displayed under the drop down.
Code	Someone in the Company must keep the books. A Code can be given to each Resource to help with this. If you are not sure what the Code should be, ask your Accounts Dept.
To add a Material Resource	▪ From the **View** pull down menu, select **Resource Sheet** ▪ Click in the next empty **Resource Name** field and type the material resource, i.e. paper, oil, concrete etc. ▪ Click in the **Type** field and using the drop down arrow, select **Material** ▪ Click in the **Material Label** field to state how your material is packed ▪ Alter the **Initials** field if you wish ▪ If you require to assign a cost to the material enter this in the **Std. Rate** field or **Cost Use** field 
To add a Cost Resource	▪ Click in the next empty **Resource Name** field and type the Cost resource name ▪ Click in the **Type** field and use the drop down arrow, select **Cost** 
Add new column	▪ Click and type the name of the new column required.

Assign Resources to their Tasks

Assign Resource Icon



Assign Resource window

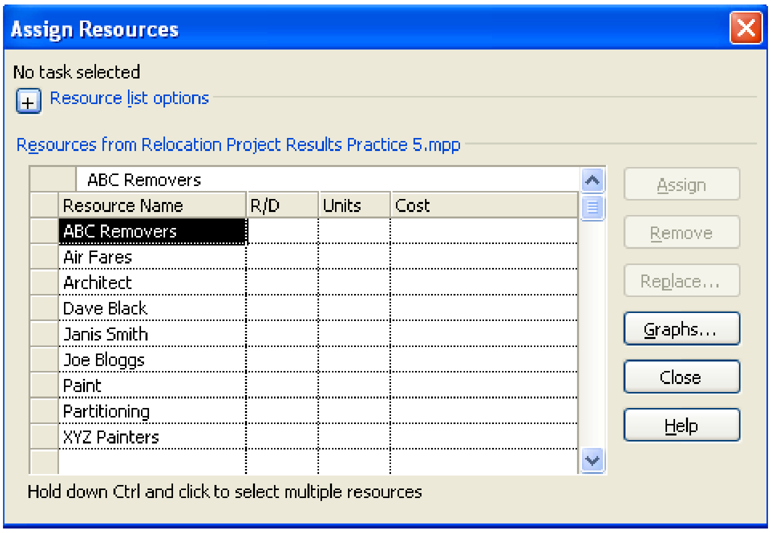


Assign Resources to their Tasks

Assigning Resources to Tasks

There are several ways of assigning resources to tasks. We will use the **Gantt Chart** view to do this.

- Switch to the **Gantt Chart** view
- Click on the **Assign Resources** icon  on the **Standard Toolbar**
- This will invoke the **Assign Resources** window (*see below)*



- Click on the task in the **Gantt Table** to which you wish to assign the resource
- In the **Assign Resources** window, click on the **Resource Name** you require and click the **Assign** button.
- Your resource will be assign full time (100%)
- If you wish to assign the resource part-time in the **Units** box, type the percentage of time this resource will be working i.e. 100% is all of their time or 25%, 50% to indicate part-time. Click **Assign.**

NOTE: When adding Resources to your project and to ensure you enter the names uniformly, view the Resource Sheet at specific intervals.

Request/Demand Option

R/D When preparing projects for resource substitution, specify whether the selected resource must do the task or whether any resource with the required skills can do the task.

Add Resources within the organisation

From the **Assign Resources** dialog box, you can add resources who do not exist in your project but do exist within your organization. This can include resources in your e-mail address book and resources who are part of an organization's entire list of resources. These are called Enterprise Resources and they can be shared across projects.

- Click + to expand Resource list options.
- Click **Add Resources**, and select one of the following options to add additional names to the Resource Name box:
- Click **From Active Directory** to select resources from your Microsoft Windows network domain.
- Click **From Address Book** to select resources from your e-mail address book.
- Click **From Project Server** to select resources from Microsoft Office Project Server

Filter a long list of Resources

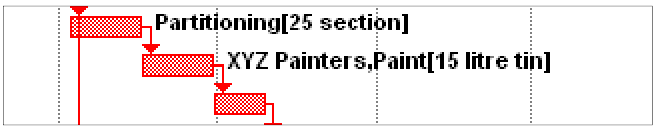
If you have a long list of resources, it's best to filter them to narrow your search. You can filter by availability which indicates when and how much of a resource's time can be scheduled for assigned work. Availability is determined by project and resource calendars, resource start and finish dates, or the level at which the resource is available for work.), work skills and other criteria.

- Click + to expand **Resource list options**, and then, under **Filter by**, select the filter options you want:
- Select the **Filter by** check box, and then select the filter you want.
- Select the **Available to work** check box, and then select the number of available hours you want resources to be filtered by.

If you have both **Filter by** check boxes selected, resources who fulfil both filter conditions are listed. If the filter you want is not available, click **More filters.**

Assign Material Resources to the Project

- Switch to the **Gantt Chart** view
- Click on the **Assign Resources** icon on the **Standard Toolbar**
- This will invoke the **Assign Resources** window
- Click on the task in the **Gantt Table** to which you wish to assign the resource
- In the **Assign Resources** window, click on the **Material Resource** you require
- Enter the number of items you are using i.e. 10 (for litres of paint) etc
- Click **Assign**



Remove a Resource

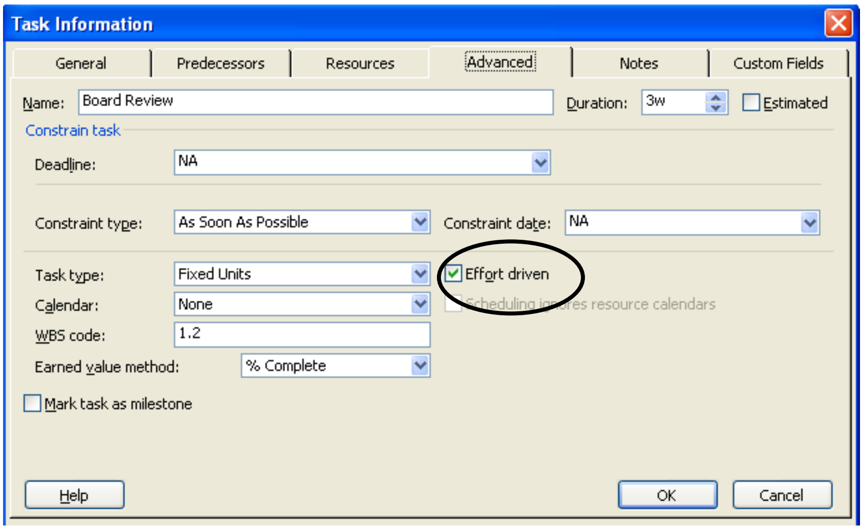
- Switch to the **Task Entry** view
- In the **Task Details Form** in the lower pane, use the **Previous** and **Next** buttons to select the task you wish to remove the resource from.
- Click on the **Resource Name** in the bottom pane
- Press **Delete** on the keyboard and click **OK**

Effort Driven Scheduling using auto Schedule

Using Auto Schedule, when you assign more than one Resource to a task by default Project cuts the duration down accordingly. This is known as **Effort Driven**. Project assumes that more than one person can do the task in less time. *(The more effort of the Resources, the less time it takes).* You must decide in your own Project if this is the case. For example, if we ask one resource to paint a wall and it takes him one day. If we assign another person to help it Project will cut the duration down to half a day *(Effort Driven)*. What if we ask to two resources to watch it dry! Would the duration decrease? No! No matter how many people watch it dry the duration will be the same *(non Effort Driven)*. This is not available in Manual Schedule. The duration will not change no matter how many resources you add to a task.

Switch Effort Driven on or off

- Double click the task to invoke the **Task Information** dialog box
- Select the **Advanced** tab



- If you do not wish the task to be **Effort Driven** uncheck the **Effort Driven** check box and click **OK**

Look at the duration field to determine if the result you required has been performed.

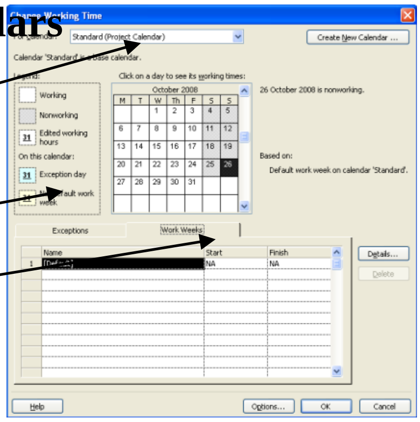
Resource Calendars

- **Tools, Change working time…**

Select Calendar

Legend of changes

Working times



Resource Calendars

Background

Resource Calendars are used in Project to define your staff's working hours and is an essential tool in managing a Project. The Project Calendar used by Project to calculate how long a project will take to complete. An in-depth explanation is on page 38.

As with the other Calendars there are 3 timing offerings with calendars. Choose the calendar that most closely mirrors the schedule that work will take place until the completion of the project.

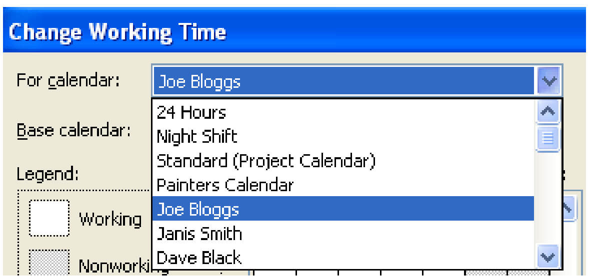
Standard (Default)	Working hours are 08:00 am to 17:00 pm with one hour for lunch (12 noon to 13:00) Monday to Friday
24 Hours	Includes around the clock, seven days a week.
Night Shift	Covers the hours from 23:00 pm to 08:00 am Monday to Saturday

We will make changes to the calendar in this section.

We can also make changes to each individual Resource's calendar or assign a new calendar to one or more of them. This allows Project to monitor when they are available for work. If you assign a Resource a task when either the Company is closed or they are on holiday, Project will do something about it.

Selecting a Resource Calendar

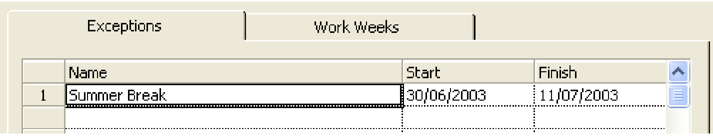
- From the **Project** tab and from the **Properties** group of buttons, choose **Change Working Time**
- This will display the **Change Working Time** dialog box
- From the **For:** box, click the drop down arrow and select either **Standard, 24 Hours** or **Nightshift**



- Click **OK**

Making Changes to the Resource Calendar

- From the **Project** tab and from the **Properties** group of buttons, choose **Change Working Time**
- This will display the **Change Working Time** dialog box
- From the **For:** box, click the drop down arrow and select the Resources Name

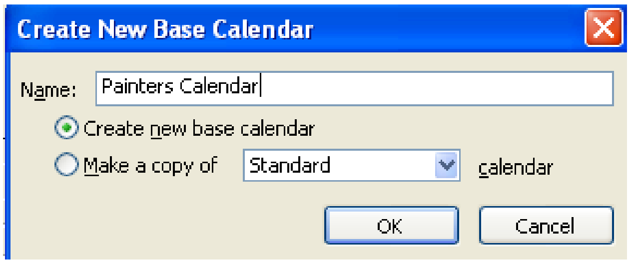


- In the **Exceptions** section type a name for the holiday
- From the **Start** field, enter a start date
- From the **Finish** field, enter a finish date
- Click **OK**

Give a Resource a New Calendar

If you find that you have a Resource, particularly an outside contractor, who works completely different hours and days to you and your company, give them a new calendar.

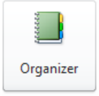
- From the **Project** tab and from the **Properties** group of buttons, choose **Change Working Time**
- This will display the **Change Working Time** dialog box
- Click on the **Create New Calendar** button
- In the **Name** box, type a name for the Calendar
- Select the option Create **new base calendar**
- Click **OK**



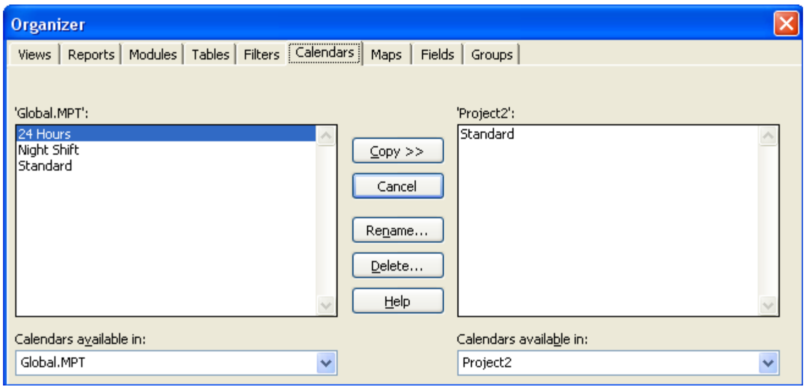
- Make the changes to the dates as required.

NOTE: When you make a new Calendar, you must assign the Calendar in the Resource Sheet View. To do this, open the Resource Sheet View; select the correct ID number for the resource. Under the Calendar field, click the drop down arrow and select the name for the new calendar.

Delete a Calendar from the Organizer

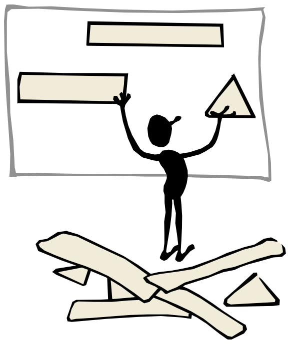


- From the **File** tab then the **Info** options and select **Organizer**
- Click the **Calendars** tab
- The left option are the Calendars in **Global** template
- The right option are the Calendars in your current Project
- To delete a Calendar in the current Project, click the Calendar name
- Click the **Delete** button



Using this window you can also copy or rename any other calendar.

Practice Session



Practice Session

In this Practice session you will add Resources to your project using the Resource Sheet, assign your Resources tasks and change the Calendar options.

1. Enter the following Resources onto the **Resource Sheet**: *(Pg 87)*

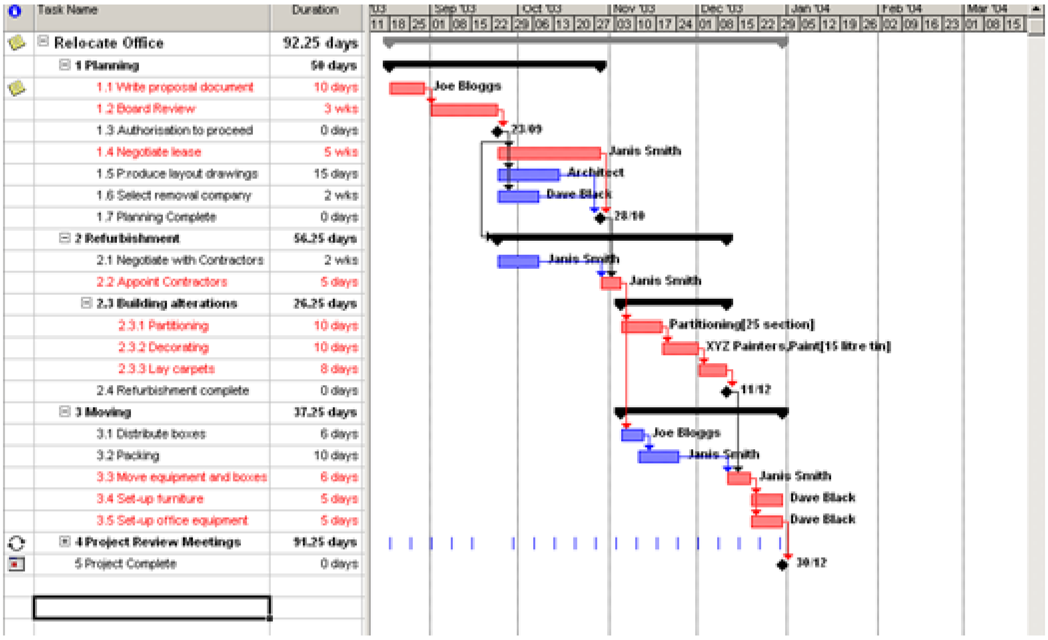
		Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At
1		Joe Bloggs	Work		JB	Admin	100%	£50.00/hr	£75.00/hr	£0.00	Prorated
2		Janis Smith	Work		JS	Admin	100%	£20.00/hr	£40.00/hr	£0.00	Prorated
3		Dave Black	Work		DB	Admin	100%	£30.00/hr	£60.00/hr	£0.00	Prorated
4		ABC Removers	Work		A	External	500%	£0.00/hr	£0.00/hr	£0.00	Prorated
5		XYZ Painters	Work		X	External	100%	£0.00/hr	£0.00/hr	£0.00	Prorated
6		Partitioning	Material	section	P			£25.00		£250.00	Prorated
7		Paint	Material	litre tin	P			£8.00		£0.00	Prorated
8		Architect	Work		A		100%	£0.00/hr	£0.00/hr	£500.00	Prorated
9		Air Fares	Cost		A						Prorated

2. Switch back to the Gantt Chart View and assign the following resources to these tasks. *(Pg 90)*

Resource Name	**Assign to Task**
Joe Bloggs	**Write Proposal Document, Distribute Boxes**
Janis Smith	**Negotiate Lease, Negotiate with Contractors, Appoint Contractors, Packing, Move equipment and boxes**
Architect	**Produce layout drawings**
Dave Black	**Select removal Company, Set-up furniture, Set-up office equipment**
Partitioning	**Partitioning (use 25 sections)**
XYZ Painters, Paint	**Decorating (Paint use 15 litres of paint)**
Air Fares	**Write Proposal document £500**

3. When assigning XYZ Painters and Paint ensure Effort Driven does not take effect. *(Pg 92)*
4. Joe Bloggs will have the first two weeks in July (*30/6/03 – 11/7/03)* as his annual holiday. Change his calendar to reflect this. Assign the name **Annual Leave** to the holiday.
5. Dave Black has been given Monday 28th July 2003 as a day off. Make the changes to his calendar. Assign a name of your choice to the name.
6. XYZ Painters work different hours and have different office closures. Give them a new calendar and call it Painters Calendar. *(Pg 94).* They are closing from 28/8/2003 until 29/8/2003. They also work every Saturday 08:00 until 16:00. Assign the new Painters Calendar to the XYZ Painters in the Resource Sheet. *(Pg 94)*
7. As you now require more meetings, increase your **Project Meetings until 31/12/03.** One of the meetings is on a nonworking day, select **No** not to include the meeting when asked. *(Pg 62)*

8. Save your Project. Your project should look similar to the one below.



Take a look at the Views

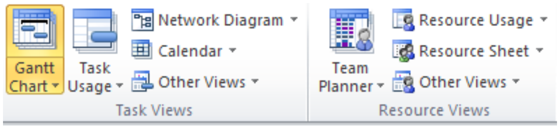
Learning Module Objective

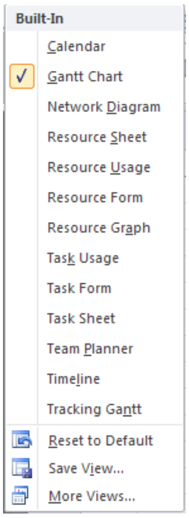
When you have completed this module you will have learned:

- Calendar View
- Network Diagram View and the Critical Path
- Task Usage view
- Tracking Gantt
- Resource Graph
- Resource Usage
- Team Planner
- More Views
- TimeLine View
- Split Views
- Filtering out data
- Using AutoFilter Feature
- Grouping data

Views

- **27 views by default**
- **Any can be customized for ease of use**
- **Use split views for entering data**
- **View data by Form, Sheet or Chart**
- **New Views are Team Planner and Timeline View**





Views

Background

In this version of Microsoft Office Project 2010 there are 27 views by default with 2 completely new views **Team Planner** and **Timeline** view. Most views can be split into two panes (top and bottom), filtered or grouped. Any of the views can also be edited, copied or customised. You can even design a new view of your own. As this is the Introduction Course you will only use a few of the views available.

It will take you some time to get to grips with all the views so try not to be too hard on yourself if you cannot find the view you are looking for.

Change the View

- Click on the appropriate button on the **View** tab
  or
- From the bottom right of the window, select one of the views

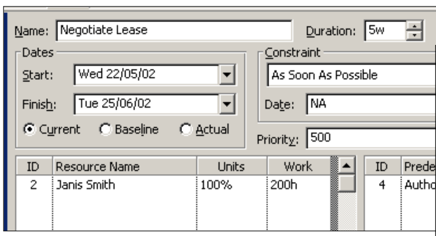
How are the views put together

Basically the 24 default views are defined into two sections: **Resource** or **Task**. The first question to ask yourself is *"Do I want to see Resource information or Task information?"* Once you have decided which, you have the following options to display the data:

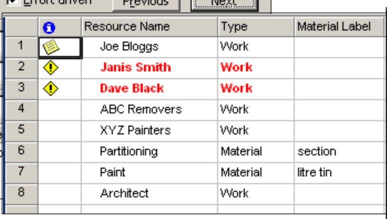
1. **By Form**
2. **By Sheet**
3. **By Chart/Graph**

For example, say you wanted to see **Resource** information; you could have the **Resource Form, Resource Sheet or Resource Graph**.

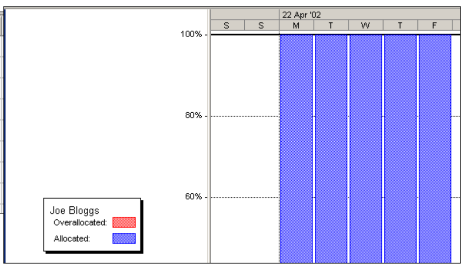
If on the other hand you wanted to see Task information, you could have the **Task Details Form, Task Sheet or Tracking Gantt Chart**.



Task Details Form

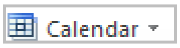


Resource Sheet

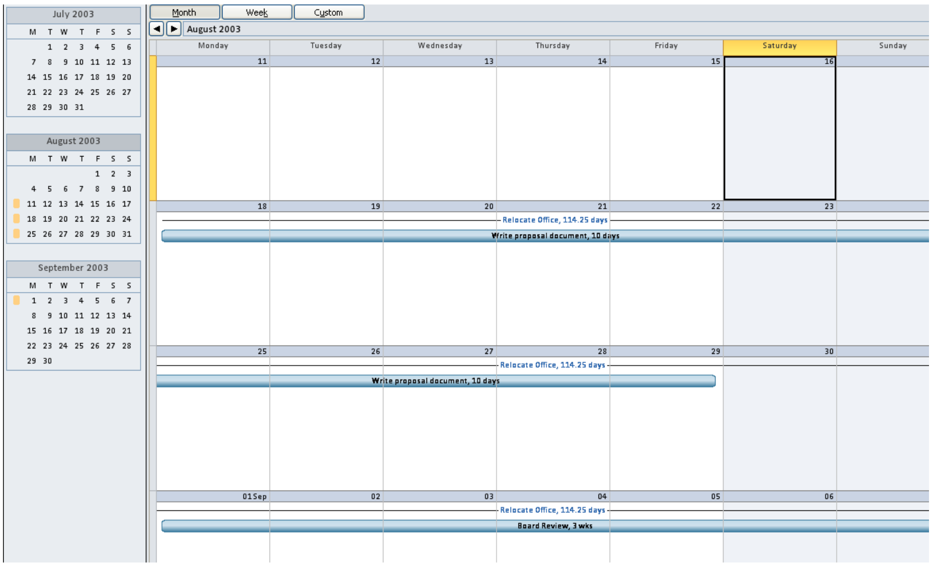


Resource Graph

Buttons on the View Tab Calendar View



The Calendar View button is the first one we will look at. It will display your data in a similar way to Microsoft Outlook Calendar View. This Calendar View in Project is often useful for showing other people your project data that do not know a lot about Project and Gantt Bars.



To move through Calendar View

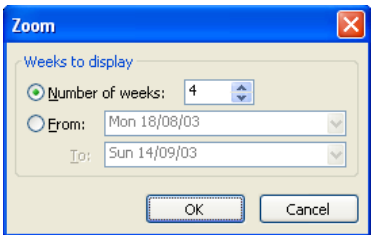
- Look towards the top left-hand side of the screen
- Click on the right arrow to move forward through time 
- Click on the left arrow to move back through time 
- The Month and Year are displayed at the top left of the screen
- You can also select **Month, Week and Custom** from the top left

To change Task Information

- Double click the task bar

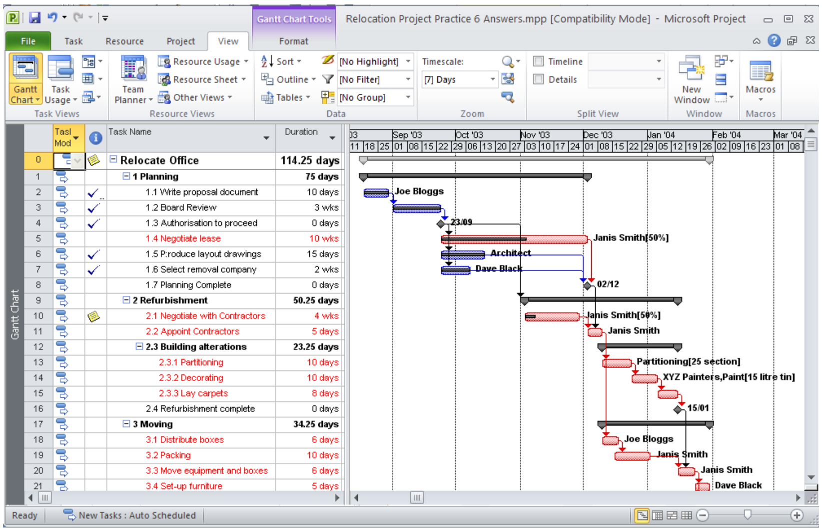
To Customise the Calendar (New)

- Click the **Custom** button at the top left of the window.
- The **Zoom** window will be displayed
- Select the number of weeks using the spinner
- Or in the **From** box enter the range of dates required.

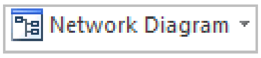


Gantt Chart View

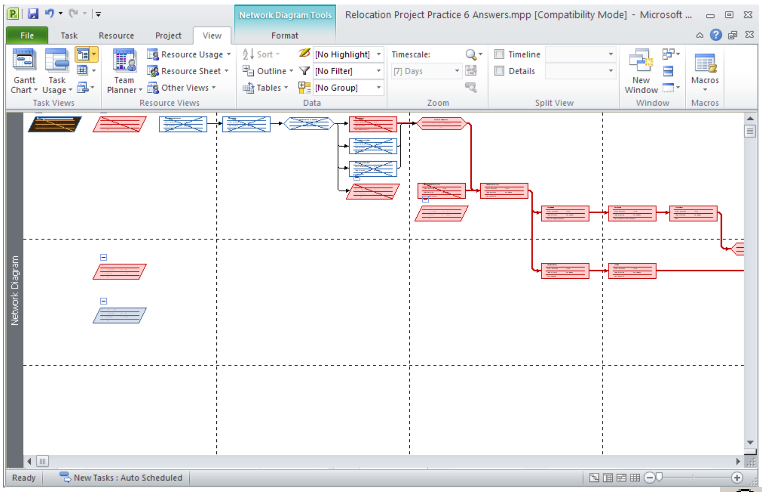
The Default View with the Gantt Table on the left and the Gantt Chart on the right. You should know this view quite well by now!



Network Diagram



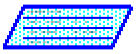
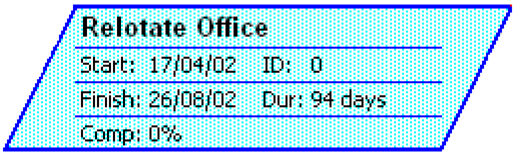
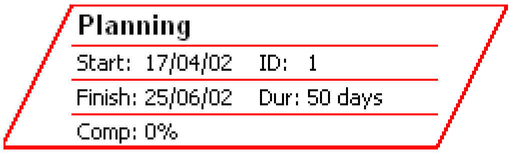
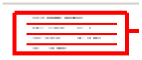
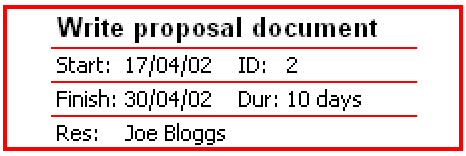
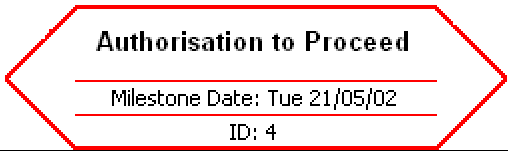
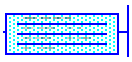
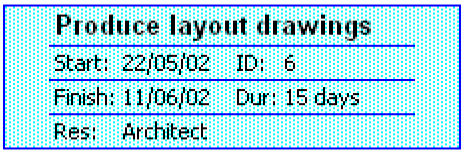
Originally called the PERT Chart View in previous versions of Project. (Program Evaluation & Review Technique). The Network Diagram view displays tasks and task dependencies in a network or flowchart format. Each node (box) represents each task. The line connecting two boxes represents the dependency between the two tasks. By default, the Network Diagram view displays one diagonal line through a task that is in progress and crossed diagonal lines through a completed task



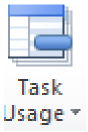
When you first open this view you may need to use the Zoom Out Tool  because you may only see a couple of nodes.

The Red Nodes are the tasks that are Critical and the Red Line, which connects them, is the Critical Path.

Within this view you can Link Tasks, Assign Resources and Update Tasks.

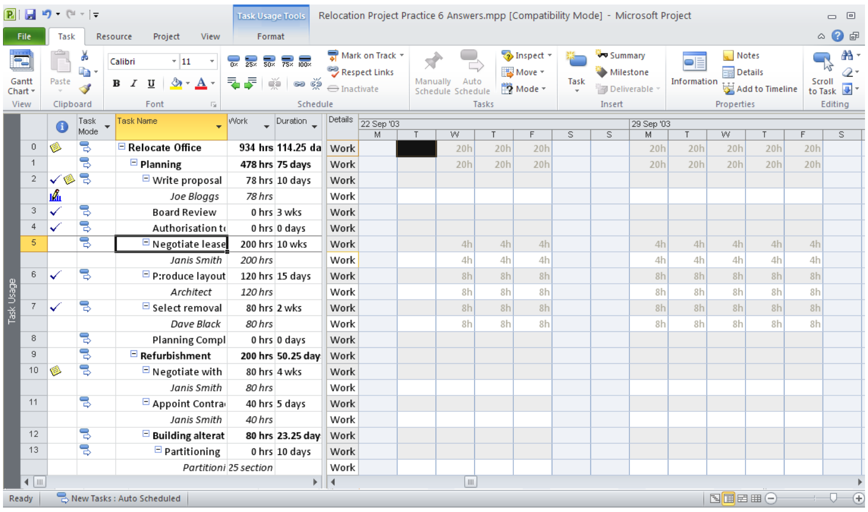
<table>
<tr><td></td><td>Project Title Node.

</td></tr>
<tr><td></td><td>Critical Summary Task (Phase Task)

</td></tr>
<tr><td></td><td>Critical Sub Task

</td></tr>
<tr><td></td><td>Critical Milestone Task

</td></tr>
<tr><td></td><td>Sub Task

</td></tr>
</table>

Task Usage View



The Task Usage view displays project tasks with their assigned resources grouped underneath them. Overallocations are also shown but not in red as they are in Resource Usage View.

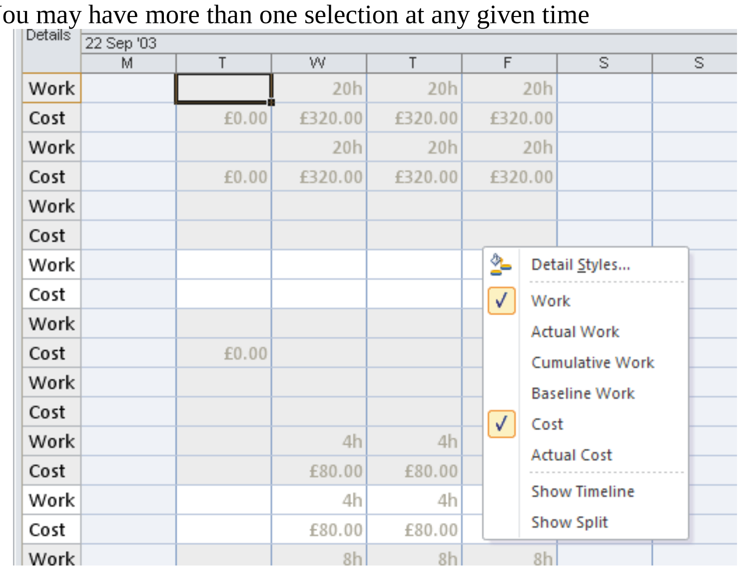
By default, the table on the left is the Usage Table, while the information on the right of the screen displayed the Work Detail. You can change the detail to Actual Work, Cumulative Work, Baseline Work, Cost and Actual Cost.



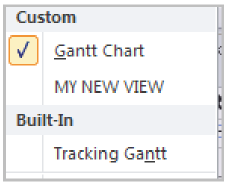
Note: The Task Usage and the Resource Usage views are very similar. The differences lie in that the Task Usage view shows the Task Name as the hierarchy whereas the Resource View shows the Resource Name as the hierarchy. Also when you look at the detail, the Actual Cost option is missing in the Task Usage view.

Change the Detail

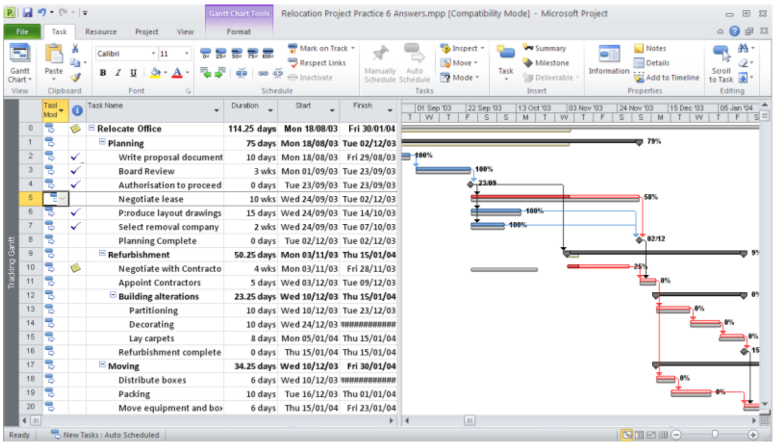
Right click on the right-hand side of the screen (yellow part) and select from the list. You may have more than one selection at any given time



Tracking Gantt



The Tracking Gantt view is useful for tracking how your project has changed since you saved with a baseline. The grey bars reflect the baseline (what you had before), the red bars show Critical Tasks, blue bars show Non-critical Tasks. Also shown is the Percentage Complete.



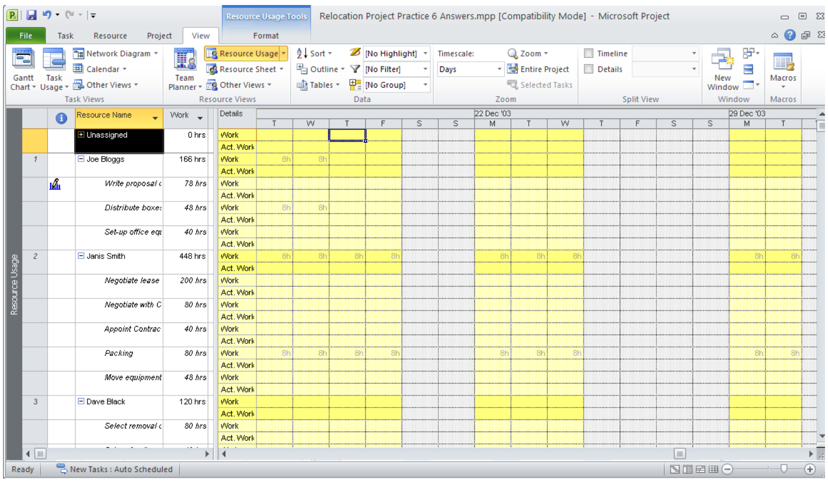
Resource Sheet

The Resource Sheet should look familiar to you by now. This is the view where you inform Project of all your resource details.

		Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar
1		Joe Bloggs	Work		JB	Admin	100%	£50.00/hr	£75.00/hr	£0.00	Prorated	Standard
2		Janis Smith	Work		JS	Admin	100%	£20.00/hr	£40.00/hr	£0.00	Prorated	Standard
3		Dave Black	Work		DB	Admin	100%	£30.00/hr	£60.00/hr	£0.00	Prorated	Standard
4		ABC Removers	Work		A	External	500%	£0.00/hr	£0.00/hr	£0.00	Prorated	Standard
5		XYZ Painters	Work		X	External	100%	£0.00/hr	£0.00/hr	£0.00	Prorated	Standard
6		Partitioning	Material	section	P			£25.00		£0.00	Prorated	
7		Paint	Material	litre tin	P			£8.00		£0.00	Prorated	
8		Architect	Work		A		100%	£0.00/hr	£0.00/hr	£0.00	Prorated	Standard

Resource Usage

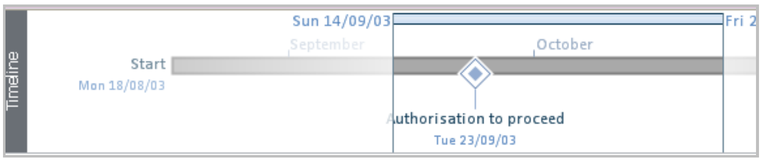
The Resource Usage View is useful for a variety of reasons. Firstly any tasks that are not assigned to a resource are displayed at the top left of the view. Overallocations are displayed in red to make them clearly visible. Resource names appear as a top heading with the tasks they are responsible for underneath. At the right-hand side of the view, the work hours are displayed. Again you can add more detail by right clicking on the yellow part and selecting from the list.



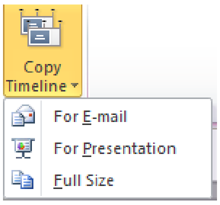
Timeline View

With this new view you can see a timeline above your project to determine when tasks will be done. You can copy this timeline to Outlook to email or to PowerPoint for a presentation.

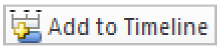
- From the **View** tab and from the **Split Views** group of buttons, tick **Timeline**



To copy the view to Email or PowerPoint; with the Timeline showing select the **Format** tab and then select from the option on the drop down list



Add Tasks to the Timeline

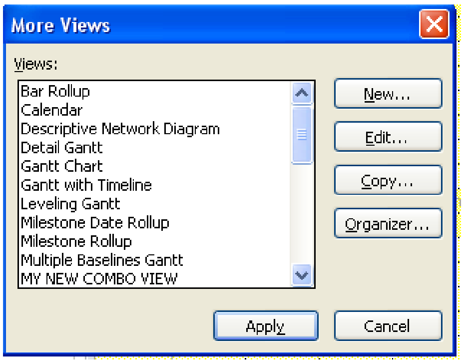
- Select the task and from the **Home** tab and the **Properties** group of buttons, select the **Add to timeline**  button.

More Views

The **More Views** button gives access to the other views available in Project.

To apply a view from More Views,

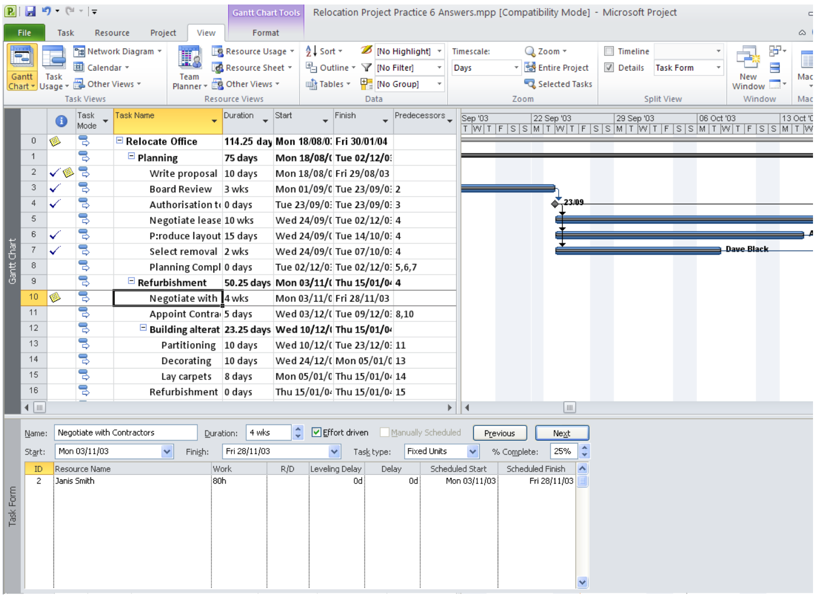
Select the view and click Apply



Split Screen Views

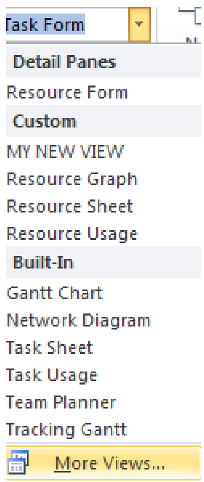
There are various split screen views available within Microsoft Office Project 2010. Some of them like the **Task Entry** View split automatically when you select the name of the view from the drop down menu. You can split any view in this version of Microsoft Office Project 2010. The split screen view is useful because it gives more detail than a single view. By selecting either a task or a resource in the top pane, the information regarding the task or resource is displayed in detail in the bottom pane. For example if you start with the Gantt Chart view and split the screen, you will have the Task Entry Form at the bottom as displayed below.

To split the view, from the **View** tab and the **Split view** group of buttons, click **Details** or **Timeline**.

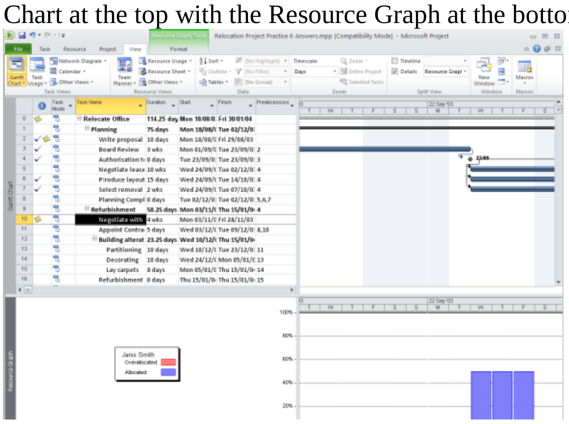


To split any view

- To split the view, select the window to change
- From the **View** tab and the **Split view** group of buttons, click the drop down arrow and select a view.



The bottom half of the window will change depending on the view you started with. Below we have illustrated the Gantt Chart at the top with the Resource Graph at the bottom.



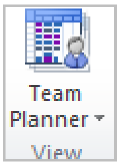
Remove the Split

- Untick the split box.

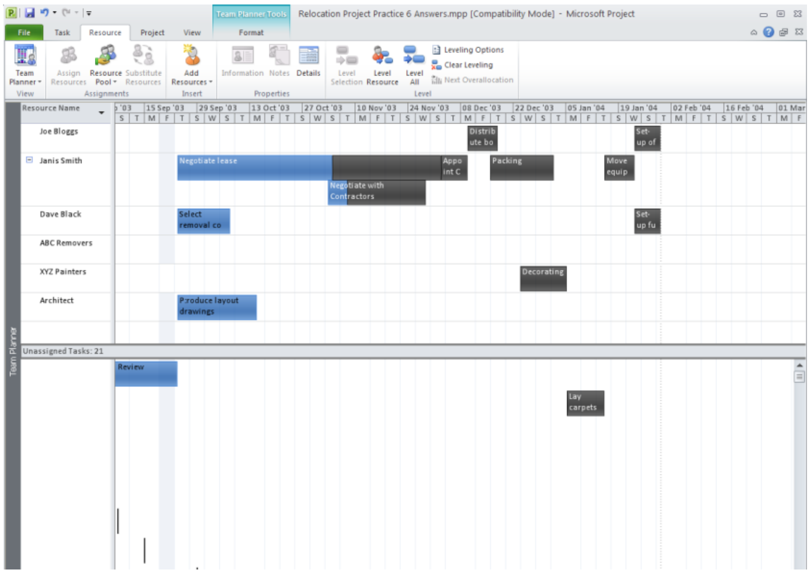
To change the top or bottom screen

- Select the **Blue Title Bar** at the left side of the screen on either the top or bottom pane.
- From the **View** drop down menu, select the view you require

Team Planner

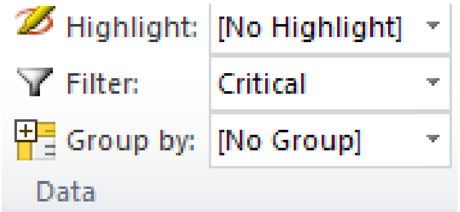


This new view will assist in reviewing what your resources are doing and if they have too much work to do at the same time. Tasks can be dragged and dropped around to resolve overallocations or to simply move tasks to where you want.



Filtering Your Data

- **There are 3 ways to filter your data in Project 2010**
- **You can use the AutoFilter, Highlight or Group**



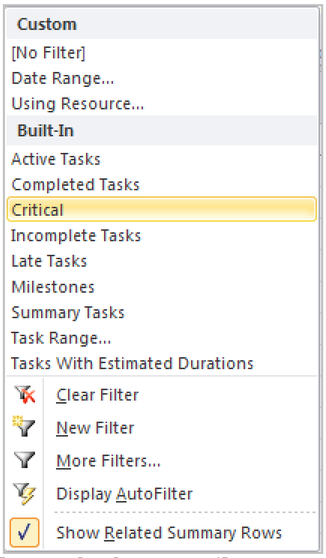
Filtering Your Data

Background

There will be times when you or others will want to ask questions of your Project. For example, *What tasks are happening next week*, or exactly what one of your Resources is responsible for. This information can be easily displayed using either the **Filter** or **AutoFilter** features. In Project 2010 you can now Highlight filtered data too!

To use the AutoFilter

- From the **View** tab then the **Data** group of buttons, click the drop down arrow next to the filter section (*see above)*.
- Select one of the built in filters by clicking on it.

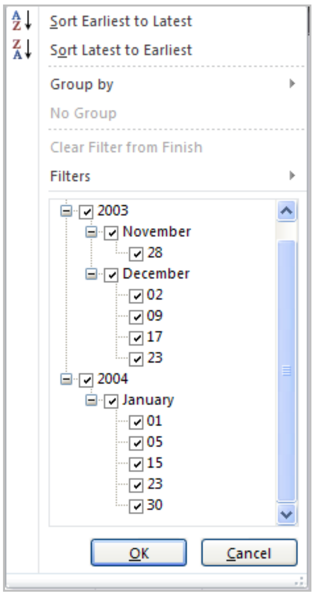


To stop the Filter

- Click the drop down arrow on the **AutoFilter** and select **No Filter**

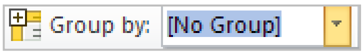
Filter a column in any sheet view

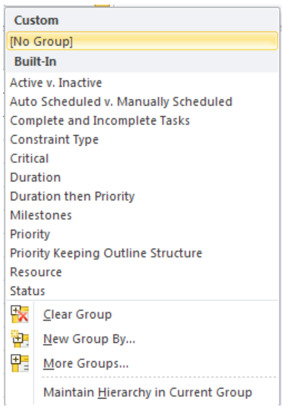
- Click the drop down arrow on the column heading and select a filter from the check boxes. Untick **Select All** and then click a tick in the boxes you require.
- You can also Group using this option.
- Click **OK** to start the filter.



Grouping your Data

- **Data can be *Grouped* together**
- **Perhaps Critical Tasks or Durations**





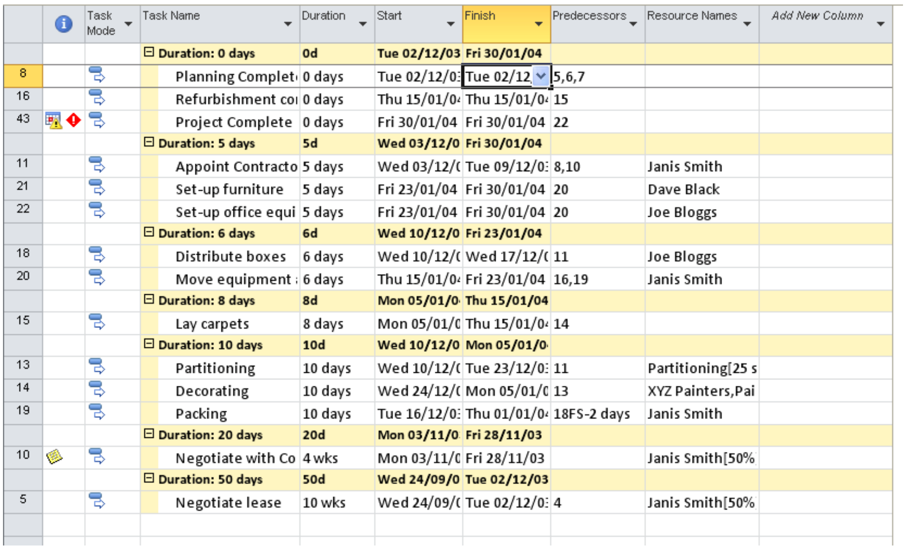
Grouping your Data

Background

There may be times when you need to *group* your data together. Perhaps you would want to group critical and non-critical tasks or even durations. This feature will allow you to view your data with 10 different Task groups or 5 different Resource Groups.

To use the Group feature

- From the **View** tab then the **Data** group of buttons, click the drop down arrow next to the filter section (*see above)*.
- Select one of the groups by clicking on it
- The illustration below has grouped by Duration.



	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names	Add New Column
		Duration: 0 days	**0d**	**Tue 02/12/03**	**Fri 30/01/04**			
8		Planning Complet	0 days	Tue 02/12/0	Tue 02/12	5,6,7		
16		Refurbishment co	0 days	Thu 15/01/0	Thu 15/01/0	15		
43		Project Complete	0 days	Fri 30/01/04	Fri 30/01/04	22		
		Duration: 5 days	**5d**	**Wed 03/12/0**	**Fri 30/01/04**			
11		Appoint Contracto	5 days	Wed 03/12/(	Tue 09/12/0	8,10	Janis Smith	
21		Set-up furniture	5 days	Fri 23/01/04	Fri 30/01/04	20	Dave Black	
22		Set-up office equi	5 days	Fri 23/01/04	Fri 30/01/04	20	Joe Bloggs	
		Duration: 6 days	**6d**	**Wed 10/12/0**	**Fri 23/01/04**			
18		Distribute boxes	6 days	Wed 10/12/(	Wed 17/12/(	11	Joe Bloggs	
20		Move equipment	6 days	Thu 15/01/0	Fri 23/01/04	16,19	Janis Smith	
		Duration: 8 days	**8d**	**Mon 05/01/0**	**Thu 15/01/04**			
15		Lay carpets	8 days	Mon 05/01/0	Thu 15/01/0	14		
		Duration: 10 days	**10d**	**Wed 10/12/0**	**Mon 05/01/0**			
13		Partitioning	10 days	Wed 10/12/(	Tue 23/12/0	11	Partitioning[25 s	
14		Decorating	10 days	Wed 24/12/(	Mon 05/01/0	13	XYZ Painters,Pai	
19		Packing	10 days	Tue 16/12/0	Thu 01/01/0	18FS-2 days	Janis Smith	
		Duration: 20 days	**20d**	**Mon 03/11/0**	**Fri 28/11/03**			
10		Negotiate with Co	4 wks	Mon 03/11/0	Fri 28/11/03		Janis Smith[50%	
		Duration: 50 days	**50d**	**Wed 24/09/0**	**Tue 02/12/03**			
5		Negotiate lease	10 wks	Wed 24/09/(	Tue 02/12/0	4	Janis Smith[50%	

To stop the Group feature

- From the **View** tab then the **Data** group of buttons, click the drop down arrow next to the filter section (*see above)*.
- Select **No Group** from the list

Printing Gantt Charts

Learning Module Objectives

When you have completed this learning module you will have seen how to:	▪ Review output with Print Preview ▪ Remove unwanted Legend data ▪ Print the Gantt Chart view ▪ Print Task Notes

Printing Gantt Charts

Printing Gantt Charts

Background

When you print a Gantt Chart, you get the level of detail that you see on the screen. This is known as **WYSIWYG** (**W**hat **Y**ou **S**ee **I**s **W**hat **Y**ou **G**et). The principle of this is realized through the **Print Preview** feature. Microsoft Project has taken this a little further whereby whatever the length of the Gantt Bars are on screen, Project will try to fit them all on one page. In previous versions of Project, if you wanted to print all the Gantt Bars on the same page, you had to use the Zoom In and Zoom Out tool to make the bars small enough so you could see them all on the screen before you hit the Print Preview button. Now Project will automatically, by default, think you want to print to one page.

In fact you can also obtain header/footer and legend information (as defined in **Page Setup**) and the entire project timescale, even if you cannot actually see it in Design View.

The columns displayed in the table will also be printed at the font size specified.

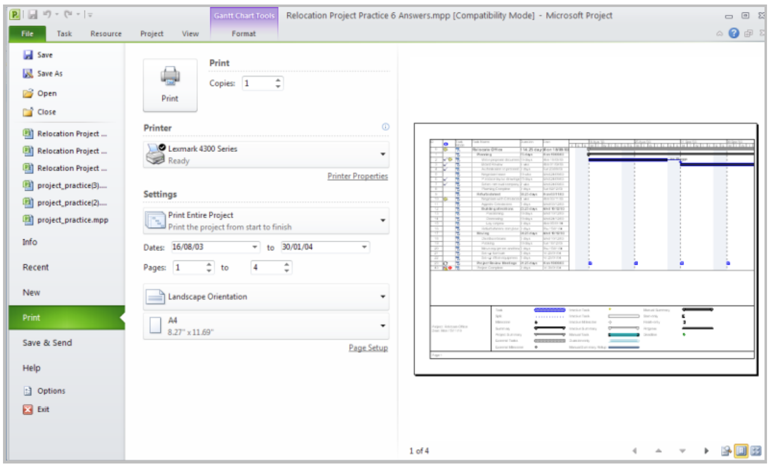
Prepare for Printing

The first thing you need to do is prepare your project for printing. You must ask yourself whether you wish to print this Project onto one piece of A4 paper or not before activating the Print Preview.

To further prepare ensure that the Vertical Split Bar which runs from the top to the bottom of the view is placed where you require it to split the Gantt Table and the Gantt Chart. For example, if you place the bar at the end of the Task Name column, then Print Preview will display the Gantt Table up to that column

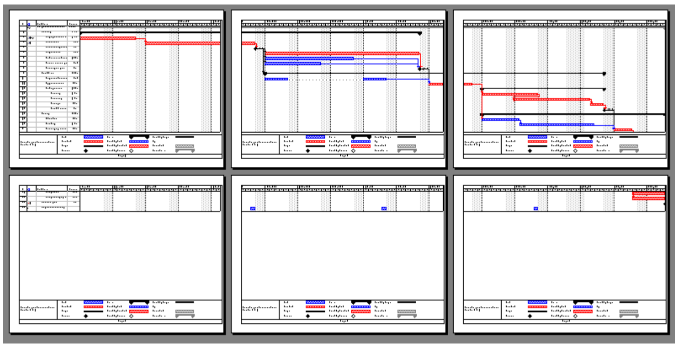
To use Print Preview

- On the **File** tab, click **Print**



- The Print Preview window is displayed.
- At the top left of the window, click the **Print** button to print the project
- In the **Printer** section, select a printer
- In the **Settings** options select whether you want to print the whole project or from specific dates or pages
- Underneath that select from **Landscape** or **Portrait**
- Underneath that, select the size of paper you want to print to.

Controlling Multiple Pages



Controlling Multiple Pages

Controlling Multiple Pages

If you use the Multiple Page Preview you will see that the Gantt Chart view is taking up six A4 pages.

- On the **Print** window, click the **Multiple Pages** button to see all the pages 

We shall see that you can control the size of each part of the chart independently or proportionally scale the whole document. You will see that controlling the page height and width independently gives you more flexibility.

However the proportional scaling option is always useful for small adjustments, perhaps where the document needs reduction by say 10%. Therefore, before you use scaling, we should review the effect of a default Page Setup option that interferes with this facility to some extent.

- In the **Print** window, click **Page Set-up** to adjust the Page Set-up
- Click the **View** tab
- Clear the option **Fit Timescale to End of Page**
- Click **Print Preview**

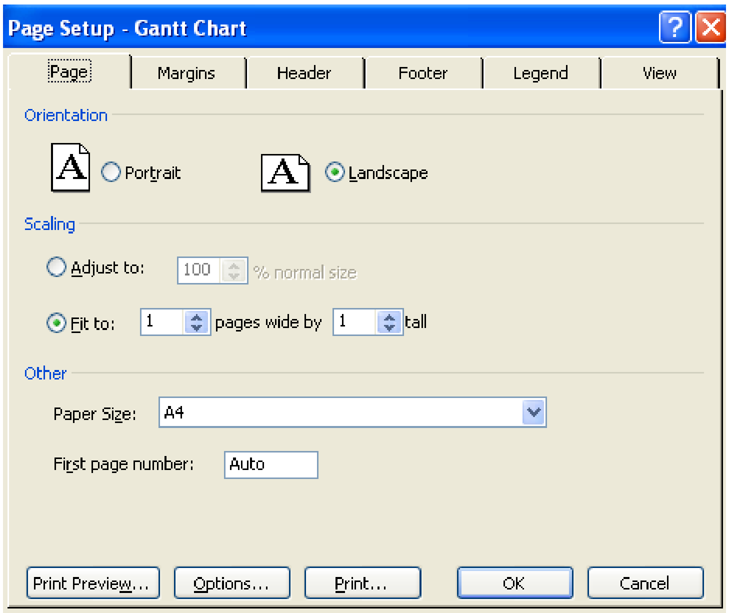
The option was stretching the Gantt Chart to fit exactly to three full pages; unfortunately it did not leave enough room to print the finish date of the last milestone. With this option off, you now have full control of the timescale spacing, which we will adjust manually with **Format, Timescale and the Enlarge %** adjustment, later in this exercise.

On this occasion we would prefer to have a single page print for the whole project. We shall try **proportional** scaling, which will allow us to **Fit to: 1 pages wide by 1 tall**.

- In the **Print** window, click **Page Set-up** and select the **Page** tab.

Using the Page Set-up, Page tab

The **Page Setup** dialog box, **Page** tab is displayed



- Select **Fit to: 1 pages wide by 1 tall**

The problem is that the document is scaled proportionally and the task names are now too small to read. If you are not pleased with the appearance of this, then you will have to use other features, which we shall now examine. First we shall reset the scaling to 100%.

- Click **Page Set-up** and select **Page** tab
- In the **Adjust to:** spin box, select **100% normal size**

Page Height

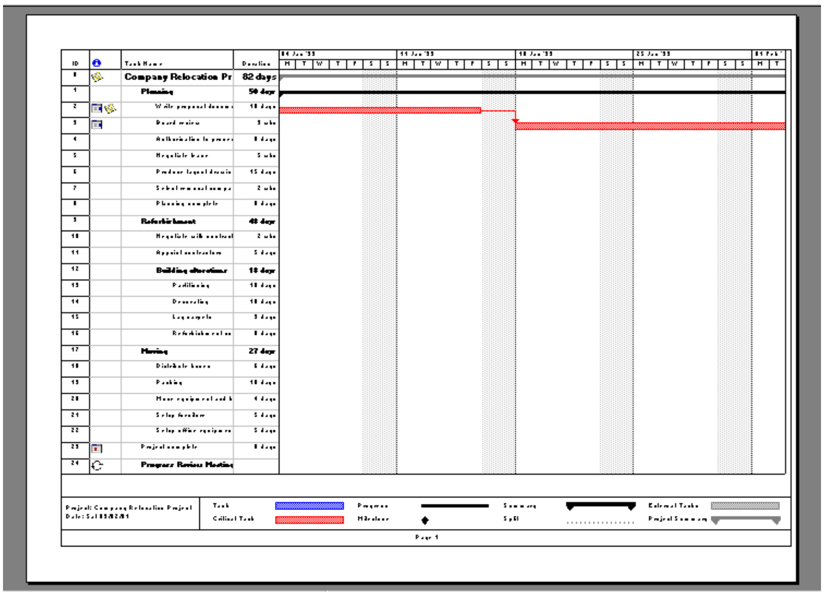
Page Height

Background

W shall examine the controls that affect the height of our report independently to the width. The first issue is the excessive number of items in the legend areas, at the bottom of each page. You could select **None** for the **Legend On** option in Page Set-up, or you can remove all but the most important ones. For this exercise we will remove the **Roll-up Bar** label from the legend as it adds little to clarify what the document is about.

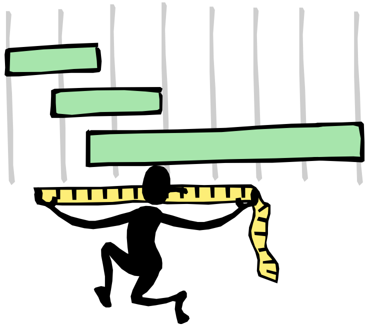
Adjust the bar height

- From the **Format** tab, select **Layout** group of buttons then click the **Format** button and adjust the **Bar Height** to **8**
- Use **Print Preview** to check that the chart fits on one page high



The row spacing is now reduced and as a consequence more tasks appear on the first page. We have resolved the page height issue!

Page Width



Page Width

Background

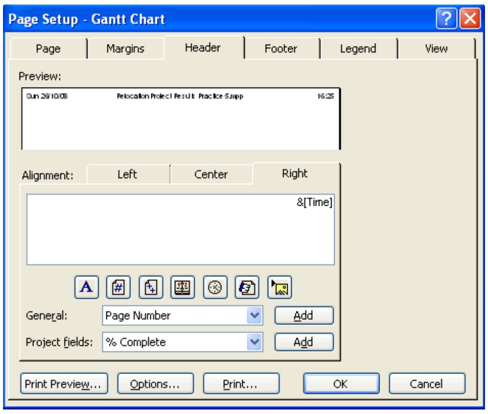
Now, we shall have to reduce the width of the document to fit onto one page wide. This is controlled by the space occupied by columns that are visible in the table, and then by the format of the timescale used. We shall adjust the timescale dimension.

Adjust timescale dimension

- Click **Task** tab to leave **Print Preview**
- On the **View** tab, click **Zoom Out** to reduce the timescale to **Weekly**
- On the **Standard** toolbar, click **Print Preview** to check if the chart fits on one page.

NOTE: Use **Format, Timescale** to adjust the default scaling of 100% to better fit the Gantt bars across the page. Ensure the **Fit Timescale to Page** option in Page Setup is deselected otherwise your adjustment will be automatically overridden.

Formatting Headers, Footers and Legends



Formatting Headers, Footers and Legends

Background

Working within Print Preview provides an opportunity to review formatting changes to headers, footers and legends. If you over elaborate in these areas you will reduce the space available for the Gantt Chart part of the document.

We shall demonstrate how to adjust the footer to include your name and then format the information.

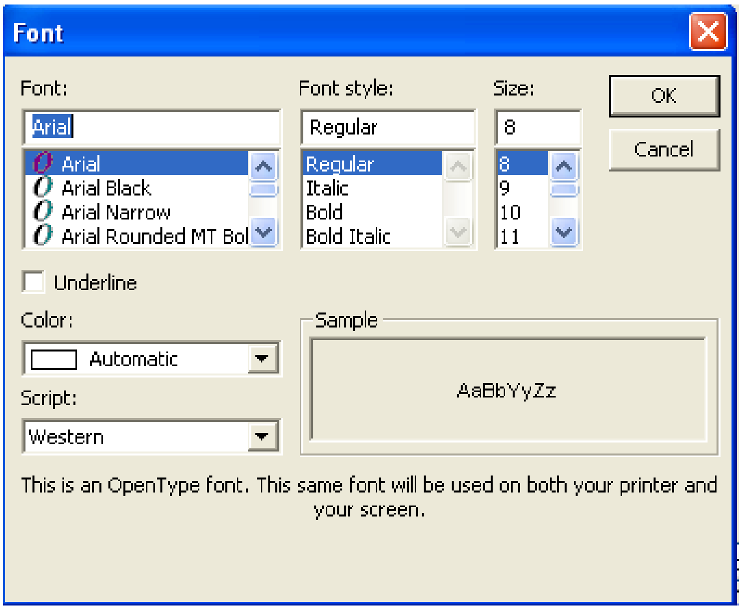
Insert a Header/Footer

- On the **File** tab, click **Print**
- The Print Preview window is displayed.
- Click **Page Set-up**
- Select the **Header** or **Footer** tab
- From the **Alignment** panel, click the **Left, Centre** or **Right** tab
- Type the data you wish to see on the header

To change the font

- Select the text you wish to change
- On the **Alignment** panel, click the **Font button** 

The **Font** dialog box is displayed



- Adjust the **Font** dialog box as necessary

To Add General Fields

Within the General Fields, you can add items like Page Numbers, Project Title, Company Name, Managers Name, etc.

- Click the drop down arrow
- Select a suitable field
- Click **Add**

To Add Project Fields

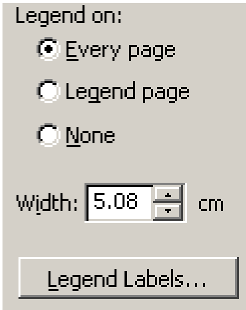
Within the Project Fields, you can add items like % Complete, Work, Cost, Actual Cost, Work Variance etc.

- Click the drop down arrow
- Select a suitable field
- Click **Add**

Remove/Change a Legend

The Legend on your print may be important to others who do not know much about Project and Gantt Bars so before you decide you do not want a Legend, think about who you are printing for.

- From **Page Setup**, select the **Legend** tab
- At the right-hand side of the window you will see the **Legend Options**



To show a Legend on each Page:
Select Every Page

To have a single page with the Legend:
Select Legend Page

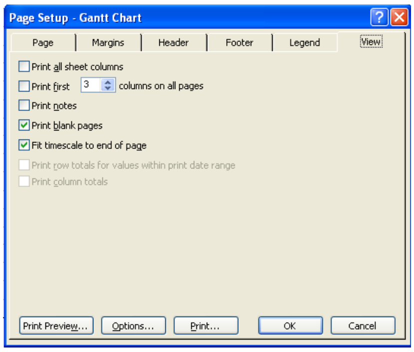
To show no Legend:
Select **None**

To change the Legend Width:
Enter a lower number in the **Width** box

To change the font for Legend Labels:
Click the **Legend Labels** button and change as required.

The View Tab

- Allows you to Print Notes
- Alter the WYSIWYG
- Print columns



The View Tab

Background

The View Tab within Page setup allows you to control WYSIWYG. When using this view, remember to place a ✓ in the box to the left of the option.

To Print all sheet columns

This option will print all the sheet columns as indicated, but will place part of the Gantt Chart in the remaining right-hand side of the page. Ensure that there is no tick in the **Print first columns on a page** box.

- Click a ✓in the Print all sheet columns box

To Print a specific number of columns

This option will allow you to print a specific number of sheet columns. Project counts the columns from the left of the Gantt Table but does not count the ID column. You cannot enter a number less than the number of columns you started with at the left of the Vertical Split Bar. For example if you placed the Vertical Split Bar at the end of the Task Name column, you cannot enter a number less than 2.

- Enter a number in the **Print first columns on a page**
- Click a ✓in the box

To Print Notes

Task Notes will appear on its own page. This option is useful if you wish to make copies of all the Task notes to give out.

- Place a ✓in the **Print Not**es box

Print Blank Pages Option

This option prints the pages in a view that contain no date, i.e. in a large Gantt Chart or Network Diagram.

- Click a ✓in the **Print blank pages** option (is on by default)

Fit timescale to end of the page

This option reduces or expands the data range so that all available space on the page is used for printing.

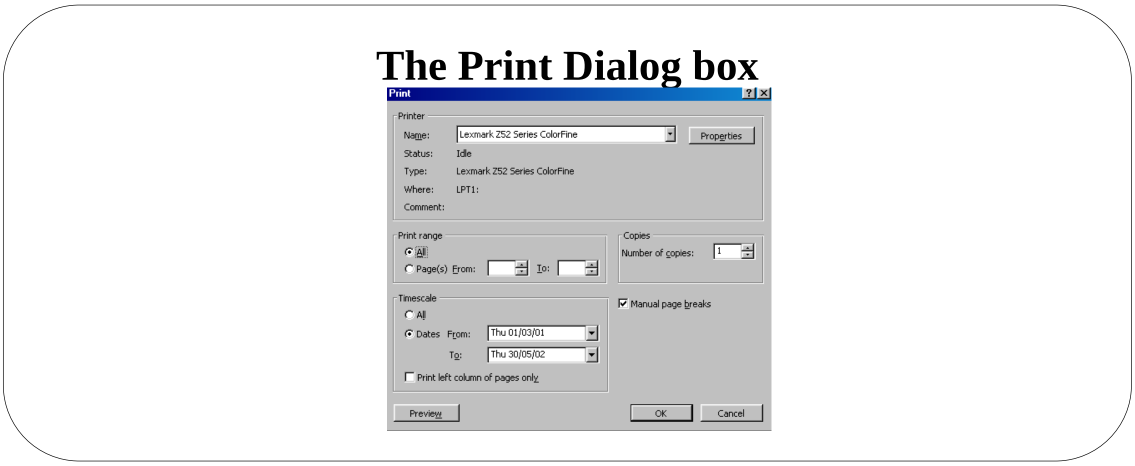
- Click a ✓in the **Fit timescale to end of the page** option (is on by default)

Print row totals for values within print date range

Adds a Total column to the printed timesheet portion of a usage view that contains row totals for a range of the timephased data. The date range used for this total is specified in the **Print** dialog box.

Print column totals

Adds a Total row to a printed usage view that contains column totals for a range of the sheet and timephased data. The date range used for this total is specified in the **Print** dialog box.



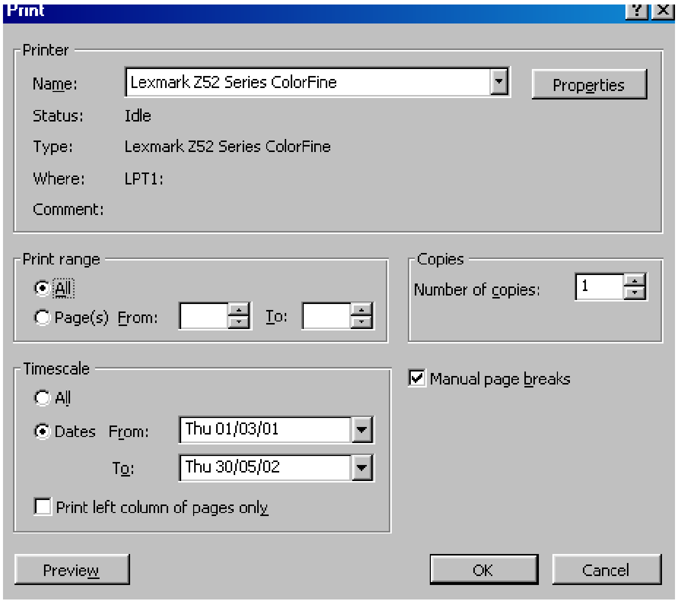
The Print Dialog Box

Print Dialog Box

We are now ready to print the document.

- Either from the **Print Preview** screen, click **Print**
- Or from the **File** pull down menu, select **Print**

The **Print** dialog box is displayed.



NOTE: The whole project timescale is printed by default (that is, start to finish dates). You can only reduce the portion to be printed in the **Print** dialog box. From the **Print range** panel, adjust the **Page(s) From** and **To** spin boxes. In this respect the concept of WYSIWYG is clearly not adhered to.

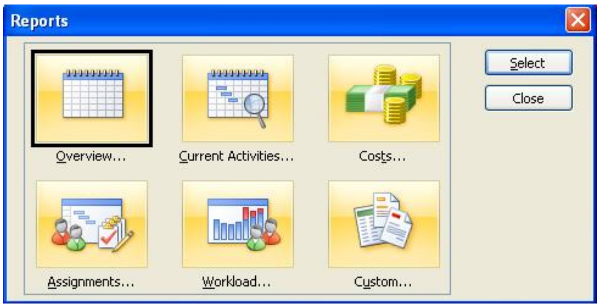
Reporting in Project

Learning Module Objective

When you have completed this module, you will have seen how to:	▪ Open the Reports dialog box ▪ Use the Overview options ▪ Produce a Report on Current Activities ▪ Produce a Report on Costs ▪ Produce a Report on Assignments ▪ Produce a Report on Workloads

Reporting in Project

- **On the Reports pull down menu**
- **Select Reports**



Reporting in Project

Background

To manage a project effectively, you may need to communicate project information to a variety of people from time to time. Microsoft Office Project 2010 can help you to prepare reports you can print reports that present the exact information you want. These reports give you specific facts and figures.

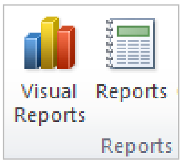
You can preview a report before it's printed which can help you verify content and display changes you made so you can adjust them again if necessary.

Reports are grouped into categories **Overview, Current Activities, Costs, Assignments** and **Workload.** The following will give details about each group.

Visual Reports

These reports export project data to Excel and Visio enabling users to display the data using PivotTables and PivotCharts.

To Print a Report



- From the **Project** tab and **the Reports** group of buttons, select **Reports**
- From the options listed, click an option, click **Select**
- From the further options listed, click an option, click **Select**
- Your report should now be in **Print Preview** mode
- Click the **Print** button to invoke the **Print** dialog box
- Select from the options, click **OK**

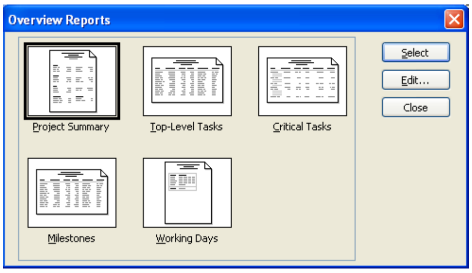
To change Headers and Footers on a Report

- From the **Print Preview** mode
- Click the **Page Setup** button
- Enter **Header and Footer** detail as you did earlier

Overview Reports

From this option you have report on the following:

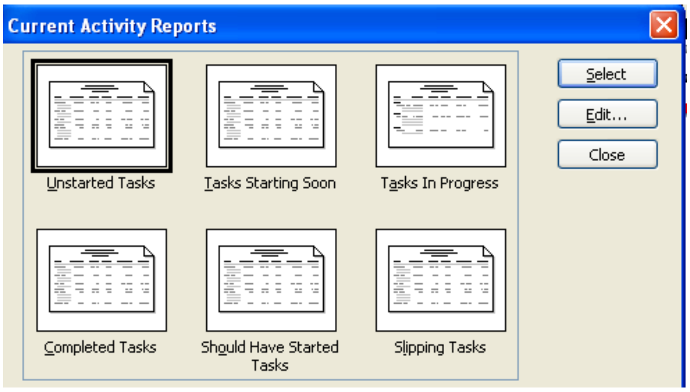
- Select one of the options and click **Select**



NOTE: It is within the Overview Reports section that you can print your Tasks Notes underneath your tasks. Try **Top level Tasks** or **Critical Tasks**.

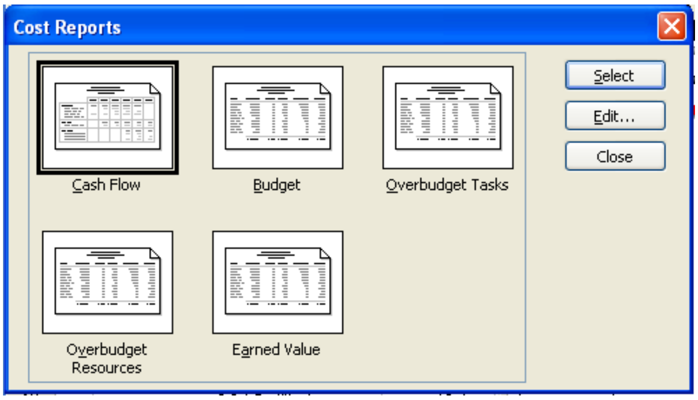
Current Activity Reports

From this option you have report on the following:



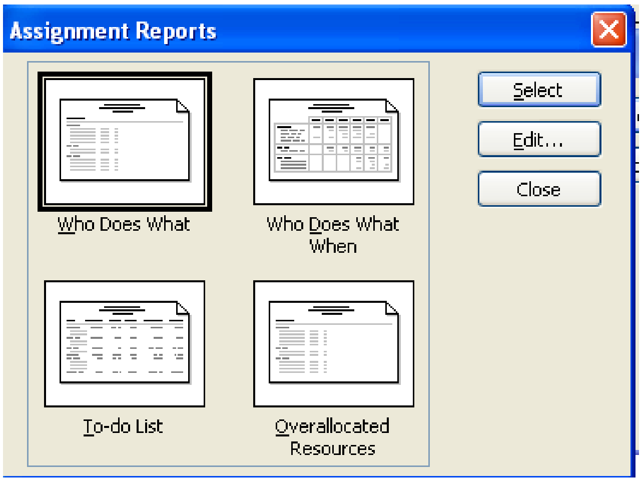
Costs Reports

From this option you have report on the following:



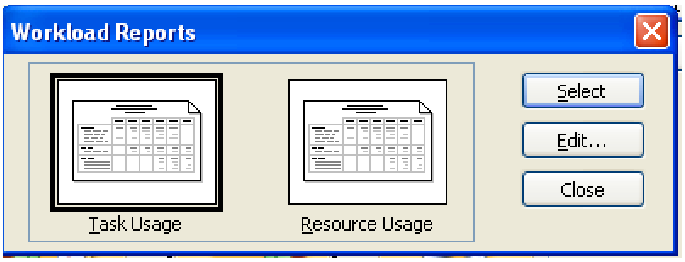
Assignment Reports

From this option you have report on the following:



Workload Reports

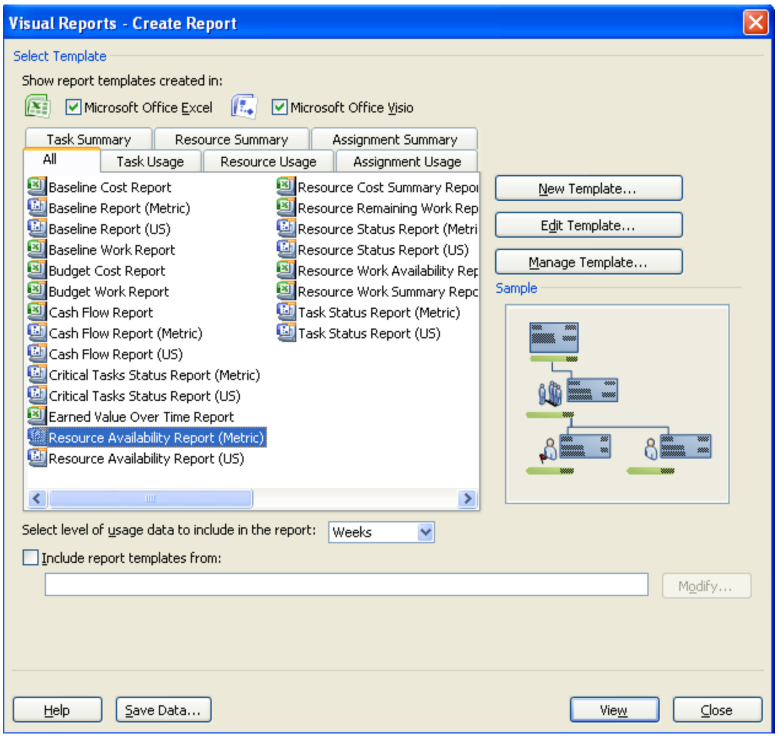
From this option you have report on the following:



Visual Reports

These reports export project data to Excel and Visio enabling users to display the data using PivotTables and PivotCharts. Visual Reports work alongside other Office Applications like Excel and Visio whereby you can produce reports with these applications straight from Project.

- From the **Reports** tab select **Visual Reports**
- You will see the **Visual Report – Create Report** window.



- Here you can select from Task Summary, Resource Summary, Assignment Summary, Task Usage, Resource Usage, Assignment Usage or All.
- Tick the boxes for Excel or Visio (only if you have these on your computer)
- The report will follow in whichever application you decided to use
- Below is a report produced in Visio