

# PROJECT 2003

**DISCLAIMER:**

This reference guide is meant for experienced Microsoft Project users. It provides a list of quick tips and shortcuts for familiar features. This guide does **NOT** replace training or a comprehensive instruction manual.

## OVERVIEW

### *Microsoft Project terms and definitions*

<b>Term</b>	<b>Definition</b>
Project	A series of activities with a specific beginning and end
Gantt Chart	The default view used to enter tasks, link tasks and assign resources; composed of a table on the left and a chart with timeline on the right
Task	A specific work activity
Summary task	A task representing the highest level in an outline of tasks
Link	A dependency between two or more tasks
Lead	A period of time when two tasks overlap
Lag	A waiting period between tasks
Resource	A person, piece of equipment, building, vehicle or other entity required to perform work
Unit	A quantity of resources
Assignment	The delegation of one or more resources to a task
Work	The estimated effort that a resource will spend on a task (measured in hours)
Calendar	A named collection of working days and times
Duration	The estimated period of time from the beginning of a task to its completion (measured in hours, days, weeks, or months)
Filter	One or more criteria that limits the display of tasks or resources
Report	A printable arrangement of Project data
View	An arrangement of data; views may be tables, forms or charts
Table	A named group of fields (columns)
Timescale	A horizontal timeline displayed in some views

## PROJECT DESIGN







A **project** is a work in progress. In other words, a project manager designs a project and continues to modify his / her estimates and track progress until the project is completed.

A project **timeline** is like a rubber band; that is, it continually readjusts to fit the number of tasks it contains. When tasks are added, the timeline increases; when tasks are removed the timeline is reduced.

It is the project manager's role to keep an eye on progress to ensure the project finishes ...

- On time
- Within budget
- With efficient resource utilization

## THE BASICS


To accomplish this ↓	Use this menu ↓	(Or) button ↓	(Or) key combo ↓	Comment
Create a new project	File > New		Ctrl N	Use a template to facilitate development
Open a project	File > Open		Ctrl O	
Save a project	File > Save		Ctrl S	Save often
Print a project	File > Print		Ctrl P	Always preview first
Undo	Edit > Undo		Ctrl Z	Only one undo available
Insert a row	Insert > New task		Ins	
Delete a row	Edit > Delete task		Del	
Spell Check	Tools > Spelling		F7	

## PROJECT CALENDAR

A **project calendar** identifies which days and hours the staff works.  
You may store several calendars in a project, but one is considered the overall Project calendar.

To accomplish this ↓	Use this menu ↓
Change the Standard calendar	Tools > Change Working Time Select days and mark Working Time and Non-Working Time
Create a new calendar	Tools > Change Working Time > New > Type a name for the calendar Select days and mark Working Time and Non-Working Time
Apply a calendar to a project	Project > Project Information Choose a calendar  <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> Calendar: <span style="border: 1px solid #ccc; padding: 2px 10px;">MY COMPANY CALENDAR</span> </div>

## NAVIGATE THE GANTT CHART

To accomplish this ↓	Use this menu ↓	(Or) button ↓	(Or) key combo ↓
View the first task		Select the task name	<span style="border: 1px solid #ccc; padding: 2px;">Alt</span> <span style="border: 1px solid #ccc; padding: 2px;">Home</span>
View the last task		Select the task name	<span style="border: 1px solid #ccc; padding: 2px;">Alt</span> <span style="border: 1px solid #ccc; padding: 2px;">End</span>
View the Gantt bar for a selected task		Select the task name  	
View a specific task by number	Edit > Go To Type a task ID number or date		<span style="border: 1px solid #ccc; padding: 2px;">Ctrl</span> <span style="border: 1px solid #ccc; padding: 2px;">G</span>







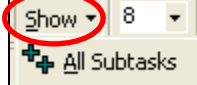
## CRITICAL PATH

Tasks on the **Critical Path** affect the Finish Date. Therefore, it is wise to display the critical path to ensure those tasks are completed on time.

To accomplish this ↓	Use this menu ↓
Display the critical path	Format > Gantt Chart Wizard > Next > Critical path  <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> <input checked="" type="checkbox"/> Critical path </div> Finish > Format It > Exit Wizard
Tasks on the critical path display in red	Critical: <span style="display: inline-block; width: 20px; height: 10px; background-color: red; border: 1px solid black;"></span> Non critical: <span style="display: inline-block; width: 20px; height: 10px; background-color: blue; border: 1px solid black;"></span>

# BUILD A PLAN

## CREATE A PROJECT



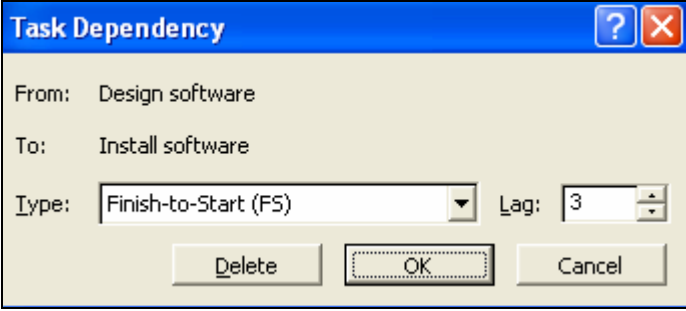
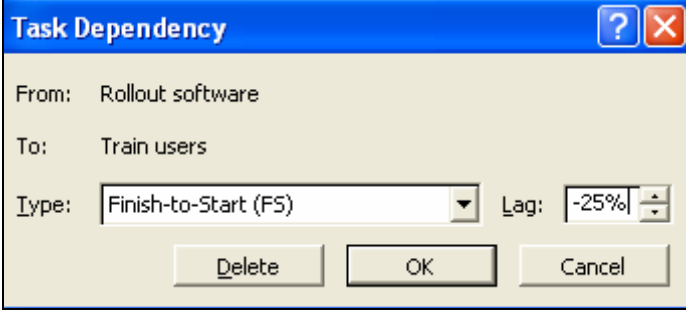
To accomplish this ↓	Use this menu ↓	(Or) button ↓	Why this step is important ↓
Enter Project properties	File > Properties > Summary Include Title, Manager and Comments and more	N/A	Summary information is used in report headers and can be used when searching for Project files
Determine the project start date	Project > Project Information > Start Date	N/A	Schedule all projects from the start so Project can estimate and forecast when will it finish <b>Important Note:</b> Do not enter a project due date in the Finish Date field!
List tasks	Type tasks in the Task Name column	N/A	Tasks are the basic unit of a project
Enter a task that occurs at regular intervals	Insert > Recurring task	N/A	Recurring tasks eliminate the need to re-create many similar tasks
Insert a task between existing tasks	Insert > New task		
Delete a task	Edit > Delete Task		
Move a task	Edit > Cut Edit > Paste	Drag a task from one row to another	
Estimate duration	Click in the Duration column Type an estimated period of time from the beginning of the task to its completion <b>Allow Project to calculate a Start Date and Finish Date!</b>		
Enter task notes	Double-click a task Click the Note tab		Use notes to explain, detail, comment, and clarify task information
Create summary tasks	N/A		Summary tasks simplify the organization of a structure; they allow subtasks to be hidden to provide an overview of project phases
Hide summary detail			Display only overall phases
Display summary detail			Display specific levels of detail
Display all tasks			Display all levels of detail

## DEPENDENCIES

Setting up a project involves more than just listing a series of activities. Activities must all be connected (linked).

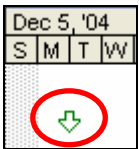

**Linking** means setting the sequence in which tasks will occur. Links may be sequential (Finish to Start) or concurrent (Start to Start).

When tasks are linked, a change in one affects the others. Automatically. Without having to retype Start and Finish dates.

To accomplish this ↓	Use this menu ↓	(Or) button ↓	Why this step is important ↓
<b>** Link tasks **</b>	<b>Select two or more tasks</b> <b>Edit Link Tasks</b>		<b>** All tasks <span style="color: red;">must be</span> linked so that changes in one task affect all others</b>
Break a link	Select tasks Edit > Unlink tasks		
<b>Lag:</b>  Delay between tasks	Double-click the link line on the Gantt chart Type the number of days of Lag  		If preceding tasks change, the delay remains
<b>Lead:</b>  Overlap two tasks	Double-click the link line on the Gantt chart Type a negative Lag or percentage  		If preceding tasks change, the overlap remains

## CONSTRAINTS

**Constraints** specify due dates, or other restrictions that must be placed on a schedule. Use constraints sparingly. Enter constraints instead of typing in the Start Date and Finish Date fields.

To accomplish this ↓	Use this menu ↓	Why this step is important ↓
Set a Project due date	<ol style="list-style-type: none"> <li>1. Double-click a task</li> <li>2. Click the Advanced tab</li> <li>3. Choose the Constraint Type: <b>Finish No Later Than</b></li> <li>4. Select a Constraint Date</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; width: fit-content;">           Constraint type: <input type="text" value="Finish No Later Than"/> Constraint date: <input type="text" value="Mon 12/6/04"/> </div>	Project will provide an alert if the due date is in jeopardy (Project will not schedule the task to occur on this date) <b>DO NOT ENTER A DATE IN THE FINISH DATE FIELD!</b>
Display a deadline marker	<ol style="list-style-type: none"> <li>1. Double-click a task</li> <li>2. Click the Advanced tab</li> <li>3. Select a deadline date</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; width: fit-content;">           Constrain task            Deadline: <input type="text" value="Mon 12/6/04"/> </div>	Project displays an arrow on the Gantt chart as a target date  A deadline is merely a visual marker. It does change your schedule  
To set a specific date for a task <b>Do not change the Start Date or Finish Date</b>	<ol style="list-style-type: none"> <li>1. Double-click a task</li> <li>2. Click the Advanced tab</li> <li>3. Choose the Constraint Type: <b>Must Start On</b> or <b>Must Finish On</b></li> <li>4. Select a date</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; width: fit-content;">           Constraint type: <input type="text" value="Must Start On"/> Constraint date: <input type="text" value="Mon 12/6/04"/> </div>	Project moves the task to the date you specify  <b>Set this constraint only when a date is absolute</b>
View the project finish date	Click the last task  Project > Project Information > Statistics	

### Manage Deadlines Techniques to Finish Earlier

- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. Reduce scope (eliminate unnecessary tasks)</li> <li>2. Assign overtime</li> <li>3. Overlap tasks (add lead)</li> <li>4. Make tasks concurrent (Start-to-Start or Finish-to-Finish)</li> </ol> | <ol style="list-style-type: none"> <li>5. Start the project sooner</li> <li>6. Add resources</li> <li>7. Change to a more efficient resource</li> </ol> |
|---|---|

## RESOURCES

**Resources** are the people, buildings, vehicles, equipment, and other entities that are required to complete tasks.




To accomplish this ↓	Use this menu ↓	
List resources	View > Resource Sheet Type resource information on the Resource Sheet	
	<b>Base Calendar:</b> Be sure to assign the appropriate calendar to each resource under his / her Base Calendar	
	<b>Maximum Units:</b> The quantity of each resource Example 1: A resource named John is available 100% of his time Example 2: If you have three engineers available, type 300% under maximum units <b>Caution:</b> If you have a part-time person, change his / her calendar (working time) instead of entering units less than 100%	
Change a resource calendar	<ol style="list-style-type: none"> <li>1. View &gt; Resource Sheet</li> <li>2. Double-click a resource</li> <li>3. Click the Working Time tab</li> <li>4. Change the calendar to reflect the resource's working hours and days</li> </ol>	This is where to indicate a resource is available only part-time  Keep the maximum units at 100% but reduce the number of hours he / she works per day

## RESOURCE ASSIGNMENTS

Once tasks and resources are listed, assign one or more resources to each task (except summary tasks.)

When you assign a resource, Project computes the hours of work that resource will perform based on the duration of the task.

**WORK = DURATION \* UNITS**

To accomplish this ↓	Use this menu ↓	(Or) button ↓	(Or) key combo ↓								
Assign one resource to a task	<ol style="list-style-type: none"> <li>View &gt; Gantt</li> <li>Double-click the task to which you want to assign a resource</li> <li>Click the Resources tab</li> <li>Choose a resource from the drop-down list</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Name</th> <th style="width: 30%;">Units</th> </tr> </thead> <tbody> <tr> <td>Allen</td> <td>100%</td> </tr> </tbody> </table>	Name	Units	Allen	100%	View > Gantt Select a task Click the Assign Resources button  Choose a resource Click Assign	View > Gantt Select a task [Alt] [F10] Choose a resource Click Assign				
Name	Units										
Allen	100%										
Assign a list of resources to a task	<ol style="list-style-type: none"> <li>View &gt; Gantt</li> <li>Double-click the task to which you want to assign a resource</li> <li>Click the Resources tab</li> <li>Choose each resource from the drop-down list</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Name</th> <th style="width: 30%;">Units</th> </tr> </thead> <tbody> <tr> <td>✓ Allen</td> <td>100%</td> </tr> <tr> <td>✓ Barbara</td> <td>100%</td> </tr> <tr> <td>✓ Charles</td> <td>100%</td> </tr> </tbody> </table>	Name	Units	✓ Allen	100%	✓ Barbara	100%	✓ Charles	100%	<p><b>Note:</b></p> <p>If you use the Resource Assignment window instead of the Task Information dialog box, Project will reduce the task duration each time you assign an additional resource or remove a resource</p>	
Name	Units										
✓ Allen	100%										
✓ Barbara	100%										
✓ Charles	100%										
Assign multiple resources from a group	<ol style="list-style-type: none"> <li>View &gt; Gantt</li> <li>Double-click the task to which you want to assign a resource</li> <li>Click the Resources tab</li> <li>In the Units field, type the number of resources you want to assign</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td style="width: 70%;">Engineers</td> <td style="width: 30%;">500%</td> </tr> </tbody> </table>	Engineers	500%	View > Gantt Select a task  Type a unit greater than 100% in the Units field Press [Enter ↵]	View > Gantt Select a task [Alt] [F10] Type a unit greater than 100% in the Units field Press [Enter ↵]						
Engineers	500%										
Assign a resource to work part-time on a task	<ol style="list-style-type: none"> <li>View &gt; Gantt</li> <li>Double-click a task</li> <li>Click the Resources tab</li> <li>In the Units field, type a percentage less than 100%</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Name</th> <th style="width: 30%;">Units</th> </tr> </thead> <tbody> <tr> <td>Barbara</td> <td>50%</td> </tr> </tbody> </table>	Name	Units	Barbara	50%	View > Gantt Select a task  Type a unit less than 100% in the Units field Press [Enter ↵]	View > Gantt Select a task [Alt] [F10] Type a unit less than 100% in the Units field Press [Enter ↵]				
Name	Units										
Barbara	50%										

*Important resource assignment information continues on the following page...*

## RESOURCE ASSIGNMENTS (continued)

When you change the number of resources assigned to a task, Project recalculates duration.

$$\text{DURATION} = \text{WORK} / \text{UNITS}$$

To accomplish this ↓	Follow these steps ↓	Comment									
Change the number of resources assigned to a task	Increase or decrease the number of resource Units	<b>Note:</b> Project may recalculate the duration of a task when you add or remove resources See topics <b>fixed duration</b> and <b>effort driven</b> to prevent this change									
Change a resource assignment	<ol style="list-style-type: none"> <li>1. Select a task</li> <li>2. Select a resource</li> <li>3. Click Replace</li> <li>4. Choose a different resource</li> </ol>	Project retains the duration and work of the original assignment									
Indicate that adding or removing resources will not affect task duration	<ol style="list-style-type: none"> <li>1. Double-click a task</li> <li>2. Click the Advanced tab</li> <li>3. Uncheck Effort-Driven</li> </ol> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;"> <input type="checkbox"/> Effort driven         </div>	<b>Example:</b> If you have one ax and ten trees, adding more resources will not speed up the task because only one person at a time can use the ax									
Prevent Project from changing task duration	<ol style="list-style-type: none"> <li>1. Double-click a task</li> <li>2. Click the Advanced tab</li> <li>3. Change Task Type to Fixed Duration</li> </ol> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px; display: inline-block;">           Task type: <span style="border: 1px solid gray; padding: 2px;">Fixed Duration</span> </div> <p>You may still change the estimated task duration If you change Work, project recalculates Units If you change the units assigned to a task, Project recalculates work</p>	<b>Example:</b> If a conference is scheduled to last two days and 100 people are scheduled to attend, the conference will not finish in one day if 200 people attend.									
Assign different amounts of work to each resource	<ol style="list-style-type: none"> <li>1. View &gt; More Views &gt; Task Form</li> <li>2. Click Next or Previous to select the task you want to change</li> <li>3. Assign resources to the task</li> <li>4. Click OK</li> <li>5. Change Work to the number of hours you want each resource to spend on the task</li> <li>6. Click OK again</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="text-align: left;">Resource Name</th> <th style="text-align: left;">Units</th> <th style="text-align: left;">Work</th> </tr> </thead> <tbody> <tr> <td>Barbara</td> <td>100%</td> <td>8h</td> </tr> <tr> <td>Engineers</td> <td>300%</td> <td>24h</td> </tr> </tbody> </table>	Resource Name	Units	Work	Barbara	100%	8h	Engineers	300%	24h	<div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-bottom: 10px;"> <span style="border: 1px solid gray; padding: 2px 10px;">Previous</span> <span style="border: 1px solid gray; padding: 2px 10px;">Next</span> </div> <p>Previous and Next allows you to navigate to other tasks and indicates your changes have been saved</p> <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-top: 10px;"> <span style="border: 1px solid gray; padding: 2px 10px;">OK</span> <span style="border: 1px solid gray; padding: 2px 10px;">Cancel</span> </div> <p>When the OK and Cancel buttons are visible, you have not yet saved your changes</p>
Resource Name	Units	Work									
Barbara	100%	8h									
Engineers	300%	24h									

## ESTIMATE WORK

**Work** is the amount of effort a resource will spend on a task.

Work can be measured in hours spent on a task or the percent of available time a resource will spend.

You may leave the duration of a task at 1 day and estimate work instead of duration.

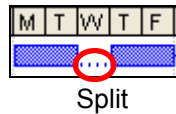


To accomplish this ↓	Follow these steps ↓	Comment						
Display Work	View > Gantt Window > Split	The lower pane contains the Task Form						
	Optional: If the Work field does not appear, click the lower pane then Format > Details > Resources & Predecessors							
Change the Task Type to Fixed Work	Select a task in the upper pane > In the lower pane, set the Task Type to Fixed Work  <div style="border: 1px solid gray; padding: 2px; width: fit-content;">                     Task type: Fixed Work ▾                 </div>	Fixed Work protects the estimated number of hours from changing						
Estimate work (amount of time each resource will spend on a task)	Type the amount of work for each resource <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Resource Name</th> <th style="text-align: left;">Units</th> <th style="text-align: left;">Work</th> </tr> </thead> <tbody> <tr> <td>Charles</td> <td>100%</td> <td>16h</td> </tr> </tbody> </table>	Resource Name	Units	Work	Charles	100%	16h	You may change this estimate at any time
Resource Name	Units	Work						
Charles	100%	16h						
Complete the estimate	Click OK	Project calculates duration, units or both						

## Manage Resources

**Overallocation** is the assignment of more work to a resource than he / she has available.

To accomplish this ↓	Use this menu ↓	Comment
View who is overallocated	View > Resource Sheet	Red indicates a resource is overallocated
	View > Resource Graph	A red name indicates the resource is overallocated Press <span>Alt</span> <span>F5</span> to view the date of overallocation Press <span>PgDn</span> or <span>PgUp</span> to view additional resources
	1. View > Resource Sheet 2. Project > Filtered for > Overallocated Resources	
	View > Reports > Assignments > Overallocated Resources	

## LEVELING

Level resources	<p><b>Leveling</b> delays one or more tasks until a resource is available</p> <p>Leveling may interrupt (split) a task</p> <p>Split tasks are separated by dots on the Gantt</p>	 <p style="text-align: center;">Split</p>
	Tools > Resource Leveling > Level Now	
Display results of leveling	View > More Views > Leveling Gantt	<p>A thin olive bar represents delay caused by leveling</p> 
Remove the results of leveling	Tools > Resource Leveling > Clear Leveling	<p>The resource problem returns and must be solved</p> 

## Techniques to Resolve Resource Overallocation

<ol style="list-style-type: none"> <li>1. Select a resource with no conflicting assignments</li> <li>2. Split a task into two sections</li> <li>3. Change concurrent tasks to occur sequentially</li> </ol>	<ol style="list-style-type: none"> <li>4. Delay a task until the required resource is available (add lag)</li> <li>5. Level the resource</li> </ol>
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## COST

Project calculates Cost when you assign a resource to a task.


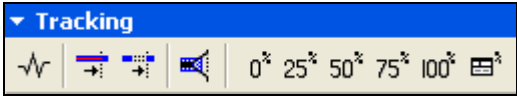




$$\text{Total Cost} = \text{Standard Rate} \times \text{Work} + \text{Fixed Cost} + \text{Overtime Cost}$$

To accomplish this ↓	Use this menu ↓
View task costs	View > Table > Cost
Assign a fixed cost	View > Table > Cost Type non-resource cost in the Fixed Cost column Fixed cost is automatically added to Total Cost
View total project cost	Project > Project Information > Statistics
Techniques to Reduce Cost	
<ol style="list-style-type: none"><li>1. Reduce scope (eliminate unnecessary tasks)</li><li>2. Replace resources with less expensive resources</li><li>3. Reschedule work when less expensive resources are available</li><li>4. Reduce task duration</li><li>5. Eliminate overtime</li></ol>	

# TRACK PROGRESS

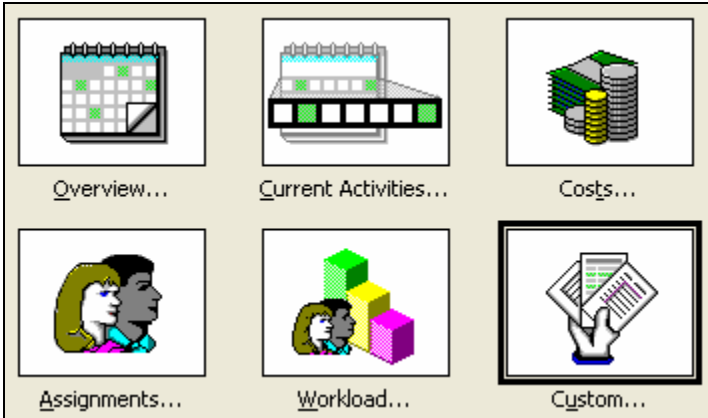
## UPDATE ACTUALS

**Actuals** are the facts. Once the project begins, enter Actuals weekly.  
Actual data updates the project immediately.

To accomplish this ↓	Follow these steps ↓	Comment ↓								
Display Tracking Gantt	View > Tracking Gantt									
Save baseline	Tools > Tracking > Save baseline > Entire project > OK	Grey bars indicate the baseline Red and blue indicate the estimated duration 								
Display Tracking toolbar	View > Toolbars Tracking 	The first button displays the Statistics window								
Display the Tracking table	View > Tables > Tracking <table border="1" data-bbox="467 936 1458 978"> <thead> <tr> <th>Task Name</th> <th>Act. Start</th> <th>Act. Finish</th> <th>% Comp.</th> <th>Act. Dur.</th> <th>Rem. Dur.</th> <th>Act. Cost</th> <th>Act. Work</th> </tr> </thead> </table>	Task Name	Act. Start	Act. Finish	% Comp.	Act. Dur.	Rem. Dur.	Act. Cost	Act. Work	Field headings for Actual data appear
Task Name	Act. Start	Act. Finish	% Comp.	Act. Dur.	Rem. Dur.	Act. Cost	Act. Work			
Update the project	Type data in the Actual fields Be sure to record the Remaining Duration	Project calculates the project according to your entry. Example: If you enter 100%, Project updates the Actual Start and Finish								
	The Tracking Gantt displays progress	On time  100%								
		Partially complete  50%								
		Early 								
		Late 								

## GENERATE REPORTS

A **report** prints status information for an entire project, progress on tasks, or current cost information. You can change the content displayed in most of these reports by changing tables, filters, or both.

To accomplish this ↓	Types of Reports ↓	
Print a report	View > Reports 	
To accomplish this ↓	Choose this category ↓	Select one of these reports ↓
Produce an overview of project tasks and dates	Overview	<ul style="list-style-type: none"> <li>• Project Summary</li> <li>• Top-Level Tasks</li> <li>• Critical Tasks</li> <li>• Milestones</li> <li>• Working Days</li> </ul>
Analyze progress of tasks that have started or should have started	Current Activities	<ul style="list-style-type: none"> <li>• Unstarted Tasks</li> <li>• Tasks Starting Soon</li> <li>• Tasks in Progress</li> <li>• Completed Tasks</li> <li>• Should Have Started Tasks</li> <li>• Slipping Tasks</li> </ul>
Analyze total budget, cost to date, and tasks that are overbudget	Cost	<ul style="list-style-type: none"> <li>• Cash Flow</li> <li>• Budget</li> <li>• Overbudget Tasks</li> <li>• Overbudget Resources</li> <li>• Earned Value</li> </ul>
Analyze resource assignments Notify resources of their assignments	Assignments	<ul style="list-style-type: none"> <li>• Who Does What</li> <li>• Who Does What When</li> <li>• To-Do List</li> <li>• Overallocated Resources</li> </ul>
Analyze resources by task Analyze tasks by resource	Workload	<ul style="list-style-type: none"> <li>• Task Usage</li> <li>• Resource Usage</li> </ul>
Custom Reports		You may design your own reports

VIEWS	
Information you enter into Project is stored in an underlying database. <b>Views</b> select and display project data in different formats.	
Use this view ↓	For this purpose ↓
Calendar	Display tasks in a calendar layout
Detail Gantt	Display slip and slack
Gantt Chart	Enter and edit project data
Leveling Gantt	View the result of leveling
Network Diagram	View a flow chart of tasks
Resource Usage	List resources, the tasks to which they are assigned, and the amount of work assigned to them daily
Task Entry (combination)	Display Gantt Chart on top; Task Form below
Task Sheet	Similar to the Gantt Chart but without the graph
Task Usage	List tasks, the resources assigned to them, and the amount of work assigned to each resource
Tracking Gantt	Display the baseline and actual progress

TABLES	
A <b>table</b> is a named collection of fields (columns). Use tables to display only the information you need at any given moment. You may design your own tables.	
Use this table ↓	For this purpose ↓
Task Tables	
Entry	Create and view general task information
Cost	View cost data and enter fixed costs
Tracking	View and enter actual data
Variance	View the difference between estimates and current dates and cost
Work	Enter remaining work; view current and baseline work; view variance
Resource Tables	
Entry	List and edit resource information
Cost	View estimated and actual cost; view cost variance
Summary	Displays Peak (highest % assignment), total cost, total work
Usage	Displays total work
Work	Displays estimated work, total work, remaining work, overtime and variance

## FILTERS

A **filter** is one or more criteria that limit the tasks or resources that are visible.

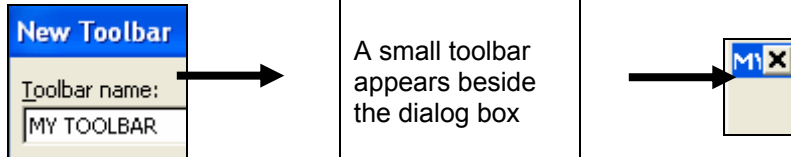
Use this filter ↓	For this purpose ↓
<b>Task Filters</b>	
All Tasks	All tasks within the current project
Completed Tasks	All tasks that have been marked 100% complete
Cost Greater Than ...	Tasks that are greater than a cost you specify
Cost Overbudget	Tasks that exceed the baseline cost
Critical	Tasks that will cause the project to be late if they are not finished on time
Date Range ...	Tasks within a time period you specify
In Progress Tasks	Tasks that have started but are not yet finished
Late/Overbudget Tasks Assigned To ...	Tasks, assigned to a specific resource, that have exceeded their estimated time and cost
Milestones	Tasks that have a duration of zero
Should Start By ...	Tasks that should start by a date you specify
Slipped / Late Progress	Tasks that are taking longer than the baseline
Summary Tasks	Tasks that have sub-tasks
Tasks with Fixed Dates	Tasks with constraints
Using Resource ...	Tasks using a resource you specify
Work Overbudget	Tasks whose work exceeds the original estimate
<b>Resource Filters</b>	
All Resources	All resources in the current project
Date Range ...	Resources assigned during a time period you specify
Group	Resources within a group you specify
In Progress Assignments	Resources with assignments that have started but are incomplete
Overallocated Resources	Resources that have been assigned more work than their schedules allow
Resources with Overtime	Resources that have been assigned overtime
Should Start By ...	Resources with tasks that should start by a date you specify
Slipping Assignments	Resources whose tasks have been delayed from the baseline
Work Complete	Resources with completed tasks
Work Incomplete	Resources with tasks that have not been finished
Work Overbudget	Resources whose work is costing more than predicted

## CREATE A VIEW AND TABLE TOOLBAR

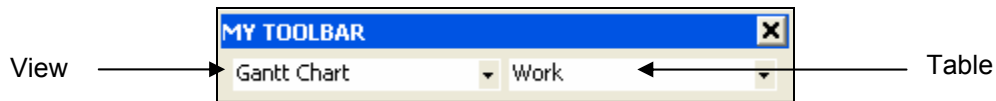
This procedure facilitates changing from one view to another or one table to another. It also displays the name of the current view and table for quick reference.

### Follow these steps ↓

1. Tools > Customize > Toolbars > New
2. Click the Toolbar tab
3. Name the toolbar



4. Click the Commands tab
5. Click the View category
6. Scroll to the bottom of the Commands list
7. Drag the View button into the new toolbar
8. Drag the Table button into the new toolbar
9. Close the dialog box



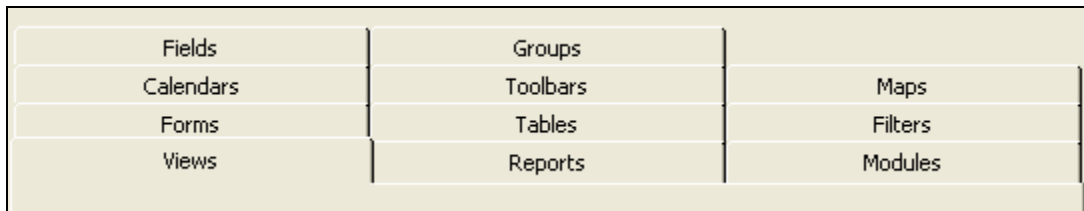
## ORGANIZER

The **Organizer** is a tool for sharing customized calendars, view, filters, reports and more.

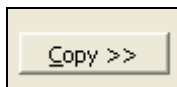
### To accomplish this ↓

### Use this menu ↓

1. Tools > Organizer





2. Select the category containing customized items
3. Select the item you want to copy
4. Click Copy to copy the item into another Project file. If you copy it to **GLOBAL.MPT**, the item will be available in all future projects.



5. Close the Organizer. **GLOBAL.MPT** is saved when you exit MS Project.

## OFFICE LINKS

To accomplish this ↓	Follow these steps ↓	
Attach a Word document or Excel spreadsheet to a task	<ol style="list-style-type: none"> <li>1. Double-click a task</li> <li>2. Click the Notes tab</li> <li>3. Click the Insert Object button</li> <li>4. Specify the file you want to attach</li> </ol>	 Insert Object
	If you enable Link, changes to the Word or Excel file are reflected in the Project note	
Link costs from Excel to a task	<ol style="list-style-type: none"> <li>1. Display the Cost table</li> <li>2. View &gt; Tables &gt; Cost</li> <li>3. Select the Fixed Cost field</li> <li>4. Open an Excel file and select the number you want to copy to Project</li> <li>5. Choose Edit &gt; Copy</li> <li>6. Return to Project</li> <li>7. Choose Edit &gt; Paste Special &gt; Paste Link</li> <li>8. Changes to the Excel file will automatically update the Project data</li> </ol>	
Save as a Web page	<ol style="list-style-type: none"> <li>1. File &gt; Save As Web Page</li> <li>2. Specify a name and location for the Web page</li> <li>3. Select a map</li> <li>4. A <b>map</b> specifies the fields to be saved on the Web page</li> </ol>	
Save the Gantt chart as a picture	<ol style="list-style-type: none"> <li>1. Modify the Gantt chart so all the bars are visible</li> <li>2. Edit &gt; Copy Picture</li> <li>3. Choose To Gif image file</li> <li>4. Specify a name and location for the image file</li> <li>5. Choose Selected Rows</li> <li>6. Specify a timescale</li> <li>7. Click OK</li> </ol>	
	The image file can be posted to a Web site or e-mailed as an attachment to a project team member or stakeholder.	