# Project 2007 Creating a Basic Project

## Starting a New Project

1. Create a new file:
   Choose FILE, NEW, then choose a BLANK PROJECT from the NEW section of the NEW PROJECT task pane, or a specific template from TEMPLATES section.
   Or
   [Click] [ ], or press <Ctrl-N> to quickly produce a new, empty project file.

## Setting the Project Start Date

Most plans should be scheduled from a fixed project start date so use AGAP scheduling and permit the calculation of slack time.

1. Choose PROJECT, PROJECT INFORMATION.
2. Ensure the SCHEDULE FROM option is set to PROJECT START DATE.
3. Enter the corresponding START DATE, and, if necessary, time. The date format is based on the Windows Control Panel setting, usually mm/dd/yy. Use the pop-ups to select valid dates.
4. Make the necessary changes, such as changing the CURRENT DATE or STATUS DATE. [Click] OK.

## Describing a Project

1. Choose FILE, PROPERTIES.
2. [Click] the SUMMARY tab.
3. Enter a description in the TITLE field and, if necessary, further descriptive information in the SUBJECT field.
4. Enter name of the project manager in the AUTHOR field.
5. Enter your COMPANY and MANAGER names.
6. Enter a description, including project definition, deliverables and special constraints in the COMMENTS field. Press <Enter> to start a new line. [Click] OK.

## Switching to a Different View

1. Ensure that the View Bar is visible. If necessary, choose VIEW, VIEW BAR.
2. [Click] the preferred icon. To see:
   - tasks on a time-scale with associated resources, choose GANTT CHART.
   - or change task dependencies or precedence, choose NETWORK DIAGRAM.
   - or change staff, costs, who is overbooked, choose RESOURCE SHEET.
   - a month-at-glance view with tasks as horizontal bars, choose CALENDAR.
   - who is working on each task and when, choose TASK USAGE.
   - what a resource is working on and when, choose RESOURCE USAGE.
   - a histogram of a resource's workload, choose RESOURCE GRAPH.
   - your plan or baseline against actual results, choose TRACKING GANTT.

## Switching to an Unlisted View

1. Choose VIEW, MORE VIEWS or [Click] the MORE VIEWS icon in the View Bar.
2. Select the view and [Click] the APPLY button.

## Undoing Changes

Choose EDIT, UNDO, [Click] [ ] or press <Ctrl-Z>.
By default you can undo 20 steps.
To redo a step, [Click] [ ].

## Using Project Guides

Learn about the software as you work. Receive advice, direction, and tips in the Project Guide pane.

1. Turn on the Project Guide toolbar, if necessary, by choosing VIEW, TOOLBARS, PROJECT GUIDE.
2. [Click] the Show/Hide Project Guide button [ ] if necessary.
3. [Click] a topic, such as TASKS or RESOURCES.
4. Read the instructions and help.
5. When done, choose VIEW, TOOLBARS, PROJECT GUIDE.

## Entering Task Information in a Sheet

Enter tasks in approximate chronological order.

1. Move to or [Click] a blank cell in the TASK NAME column.
2. Type a brief description of the task.
3. Press the <Enter> or <Down Arrow> key, or [Click] [ ] to complete an entry; press <Esc> or [Click] the [ ] to discard an entry. The <Enter> key may be configured to move down one row.

## Entering or Changing a Task Duration

Estimate the effort required to complete the task at the preferred level of quality, initially consider this time as if only one person is available. Duration units are: MO for months, W for weeks, D for days (assumed), H for hours and M for minutes.

1. Select the DURATION field for a task.
2. Enter a value or [Click] spin controls to increase or decrease the value. To create a milestone, enter a duration of zero.
   - The letter "e" can be used for an elapsed duration (3 edt).
   - Enter appropriate unit codes (see above).
   - A question mark (?) can be used for an estimated duration (3 edt).
3. Press <Enter>.

## Sequencing All Tasks Quickly

Project can compute the start and finish date of each task if you associate them with one another, or link them. Every task should be linked.

1. Select the tasks to sequence.
2. Choose EDIT, LINK TASKS, [Click] the Link Tasks button [ ], or press <Ctrl-F2>.

## Unlinking Tasks

1. Select the tasks to unlink.
2. Choose EDIT, UNLINK TASKS or [Click] the Unlink Tasks button [ ].

## Changing Data in One or More Rows

1. Select a row or rows.
2. Choose PROJECT, TASK INFORMATION, or PROJECT, RESOURCE INFORMATION, or [Click] [ ]. Alternatively, [Double Click] a single task or resource row or press <Shift-F2>.
3. [Click] the preferred tab. Apply changes in the appropriate fields. [Click] OK.

## Inserting or Deleting Rows

1. Select a row or rows.
2. Choose INSERT, NEW TASK or NEW RESOURCE or press the <Insert> key.

Or

1. Choose EDIT, DELETE TASK or DELETE RESOURCE or press the <Delete> key.

## Zooming in a View

In views with a time-scale, you can expand or compress time. Compressing or zooming out is often necessary to fit a large project on fewer sheets of paper. Warning: Zooming in the Network Diagram does not affect printing scale.

- Move closer: [Click] [ ] or press <Ctrl-/>
- Move away: [Click] [ ] or press <Ctrl-*>

## Moving or Copying Items

1. [Click] a row number or [Drag] across row numbers.
2. [Drag] the selection by the edge, up or down until the bold postal insertion point is in the correct location. To copy, press and hold <Ctrl> while dragging.

## Copying Data to Adjacent Cells

This is most useful in the RESOURCE SHEET view.

1. Select the top or left cell that contains data to be copied. The cells below or to right will receive the data.
2. [Drag] the Fill Handle down or right.

## Changing Gantt Chart Appearance

The Gantt Chart Wizard guides you through the steps of customizing a Gantt Chart. You can show or hide the critical path, resource names, dates, dependency lines, and so on.

1. Choose FORMAT, GANTT CHART WIZARD, or [Click] the Gantt Chart Wizard button [ ].
2. Follow the steps in the Wizard.
3. [Close] FORMAT IT. [Click] EXIT WIZARD.

## Setting the Calendar

The default calendar schedules people to work 8:00am to 5:00pm from Monday to Friday. If nothing else, you should enter country and company holidays.

1. Choose TOOLS, CHANGE WORKING TIME.
2. Use the vertical scroll bar or <Page Up> and <Page Down> keys to select the month.
3. [Click] on the day. If unsure of the exact day when a holiday will fall, choose any day, then change it later.
4. [Click] the EXCEPTIONS tab, if necessary.
5. [Click] the next available empty NAME cell.
6. Type the name of the holiday and press <Enter>.
7. For annual holidays, select the holiday, and [Click] the DETAILS button. Adjust the RECURRENCE PATTERN as needed and [Click] OK.
8. [Click] the WORK WEEKS tab.
9. [Click] the [DEFAULT] Name, if necessary, and [Click] the DETAILS button.
10. [Drag] from the MONDAY through FRIDAY headings to select all days of the week for all time.
11. Change the start, lunch, and finish times in the FROM and TO fields to reflect when work will normally be done in a day. [Click] OK. [Click] OK again.

**Selecting Rows**

| | |
|---|---|
| Non-adjacent rows | [Click] the first row or cell, press <Ctrl> and [Click] additional rows. |
| All rows | [Click] on a column heading, e.g. TASK NAME |

**Working in the Gantt Chart**

| To do this... | Press this... |
|---|---|
| Show beginning of project | Alt-Home |
| Show end of project | Alt-End |
| Go to start of selected task | Shift-Ctrl-F5 or [Click] [ ] |
| Go to first row of sheet | Ctrl-↑ |
| Go to last row of sheet | Ctrl-↓ |
| Go to leftmost column | Home |

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# Microsoft Project Help Guide

A Loxley

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