Microsoft®

Project 2007

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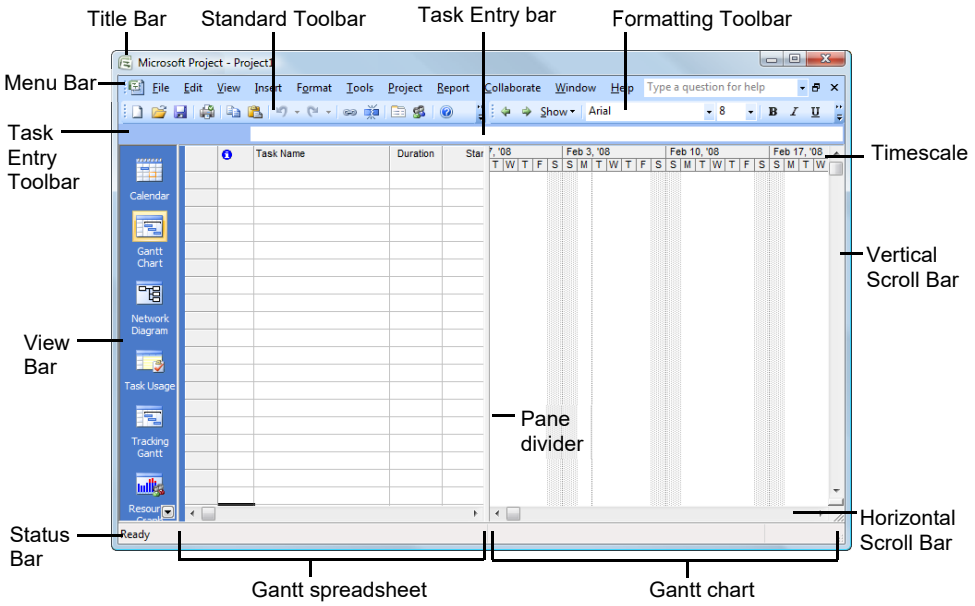
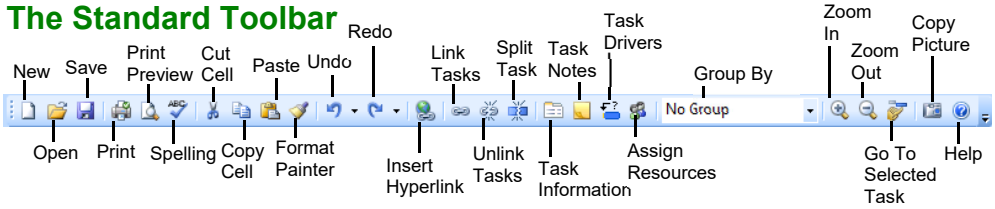
Project 2007 Screen



The Fundamentals

The Standard Toolbar



- **To Create a New Project:** Click the **New** button on the Standard toolbar, or select **File** → **New** from the menu, or press **Ctrl** + **N**.
- **To Use a Template:** Select **File** → **New** from the menu, click the **On my computer** link in the task pane and select a template in the dialog box.
- **To View Information About the Project:** Select **Project** → **Project Information** from the menu.
- **Set the Working Time Calendar:** Select **Tools** → **Change Working Time** from the menu. Select the date(s) you want to change and select a new calendar, or enter the new working hours in the **From:** and **To:** boxes.
- **To Use Spelling, Undo and Redo:** Click the **Spelling** button, **Undo** button and **Redo** button on the Standard toolbar.
- **To Open the Timescale Dialog Box:** Select **Format** → **Timescale** from the menu, or double-click inside the timescale header.
- **To Adjust the Timescale:** Change the options in the Timescale dialog box, or select **View** → **Zoom** from the menu and select the time scale you want to view.
- **To Save a Project File:** Click the **Save** button on the Standard toolbar, select **File** → **Save** from the menu, or press **Ctrl** + **S**.
- **To Save a Baseline Plan:** Select **Tools** → **Tracking** → **Save Baseline** from the menu. Click the **Save Baseline** option, save the plan for the entire project or selected tasks, click **OK**.
- **To Save an Interim Plan:** Select **Tools** → **Tracking** → **Set Baseline** from the menu. Click the **Save Interim plan** option, name the plan, save the plan for the entire project or selected tasks, and click **OK**.
- **To Show or Hide the Project Guide:** Select **View** → **Turn on Project Guide** or **Turn off Project Guide** the menu.
- **To Show or Hide the View Bar:** Select **View** → **View Bar** from the menu.
- **To View a Task's Chart bar:** Select the task and click the **Go To Selected Task** button on the Standard toolbar.
- **To Get Help:** Press **F1** to open the Project Help task pane, type your question, and click the **Start searching** button.

Common Views

To Display a View: Select **View** from the menu bar and select a view from the menu, or select a view from the View Bar.

Calendar: Displays tasks and durations in a monthly calendar.

Gantt Chart: Default view. Displays a list of tasks with bar chart information.

Network Diagram: Displays a sequence or logic diagram that shows the project's tasks and dependencies.

Task Usage: Displays a list of tasks showing assigned resources under each task.

Tracking Gantt: Displays a list of tasks with a baseline schedule and Gantt bars.

Resource Graph: Displays a graph of resources and their costs, etc. over time.

Resource Sheet: Displays a list of resources and their details in rows and columns.

Resource Usage: Displays assigned tasks grouped under each resource.

More Views: Choose from a list of more advanced and specific views.

Keystroke Shortcuts

Task or Resource Information	**Shift + F2**
Assign Resources	**Alt + F10**
Copy	**Ctrl + C**
Cut	**Ctrl + X**
Paste	**Ctrl + V**
Help	**F1**
View Context-Sensitive Help	**Shift + F1**
Go To Selected Task	**Ctrl + Shift + F5**
Link Selected Task	**Ctrl + F2**
Unlink Selected Task	**Ctrl + Shift + F2**
Create a Hyperlink	**Ctrl + K**
Zoom In	**Ctrl+ /**
Zoom Out	**Ctrl + Shift + ***
Undo/Redo	**Ctrl + Z**
Bold	**Ctrl + B**
Italics	**Ctrl + I**
Underline	**Ctrl + U**

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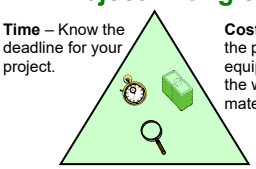
Plan and Manage the Project

- There are six basic steps to follow when planning a project: (1) Define a project (2) Plan project activities (3) Plan for and gather resources (4) Plan project costs (5) Plan for quality and risks (6) Plan security and communication.
- Project management is the process of planning, organizing, and managing tasks and resources to accomplish an objective within constraints of time, resources, or cost.
- Adjusting one constraint of the Project Triangle affects the other two.

Project Triangle



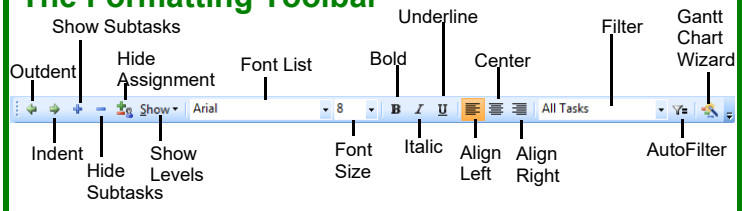
Time – Know the deadline for your project.

Cost – This includes the people and the equipment that do the work, and the materials they use.

Scope – This includes the quality, functions, and features of your product or service, and the work required to deliver it.

Working with Tasks

The Formatting Toolbar



- **To Enter a Task:** Type the task's name in the Task Name column and press **Enter**.
- **To Enter a Duration:** Type the duration (m = minutes; h = hours; d = days; w = weeks; mo = months) in the Duration column and press **Enter**.
- **To Create a Milestone:** Enter 0 (zero) in the Duration column. Or, click the **Task Information** button and select the **Advanced** tab, click the **Mark task as Milestone** check box and click **OK**.
- **To Create a Recurring Task:** Select **Insert** → **Recurring Task** from the menu, enter information into the Recurring Task Information dialog box, and click **OK**.
- **To Access Task Information:** Select the task and click the **Task Information** button on the Standard toolbar. Or, press **Shift + F2**
- **To Organize the Task List:** Create summary tasks and subtasks by selecting the task(s) and clicking the **Outdent** or **Indent** button on the Formatting toolbar.
- **To Link Tasks:** Press **Ctrl** and select the two tasks you want to link in the order that you want to link them and click the **Link Tasks** button.
- **To Unlink Tasks:** Press **Ctrl** and select two linked tasks in the order they are linked. Click the **Unlink Tasks** button.
- **To Split a Task:** Select the task, click the **Split** button, and use the dividing tool to split the task's Gantt bar.
- **To Enter Lag or Lead Time:** Click the successor task, and click the **Task Information** button. Click the **Predecessors** tab and enter a lead time with a (-) minus sign, or lag time with a (+) plus sign in the **Lag** box.
- **To Enter a Task Deadline or Constraint:** Click the task to which you want to add a deadline and click the **Task Information** button. Click the **Advanced** tab, and enter a deadline into the Deadline box, or choose the constraint you want to use, and enter the Constraint date.
- **To Assign a Task Calendar:** Select the task, click the **Task Information** button and click the **Advanced** tab. Click the **Calendar** list arrow and select a calendar from the drop-down list.
- **To Apply a Filter:** Click the **Filter** list arrow on the Formatting toolbar and select the filter you want to apply to the project.

Working with Resources and Costs

- Buttons on the Standard and Formatting toolbars change for resources in resource views. Enter and work with resources just as you would with tasks.
- **To Enter Resource Availability:** Click the **Resource Information** button on the Standard toolbar. Enter the Available To and Available From dates in the Resource Availability table, and enter the Maximum Units available in the Units field.
- **To Assign a Resource:** Select a task and click the **Assign Resources** button, select the resource(s) and click **Assign**.
- **To Enter Costs:** In a resource view, enter amounts in the **Std. Rate** field, the **Ovt. Rate** field, or the **Cost/Use** field. Then choose when you'd like to begin accruing the resource cost in the **Accrue At** field.
- **To Enter Fixed Costs:** Select **View** → **Gantt Chart** from the menu and select **View** → **Table** → **Cost** from the menu. Select the task for which you want to enter a fixed cost and type the cost in the Fixed Cost field.

Viewing the Project

- **Applying a Split View:** Select **Window** → **Split** from the menu and select the view you want to display in the bottom pane.
- **Applying Groups:** Select **Project** → **Group by** from the menu and choose a grouping option from the menu.
- **Applying Filters:** Select **Project** → **Filtered for** from the menu and then choose the filter type you want to use.
- **Applying Tables:** Select **View** → **Table** from the menu, and select the table you want to view.
- **Sort the Information:** Select **Project** → **Sort**, and then choose a sorting option.
- **View the Critical Path:** Select **View** → **More Views**, select **Detail Gantt** from the dialog box and click **Apply**.

Tracking Progress

- Always save a baseline plan before beginning to track progress.
- **Update Tasks:** Select the task you want to update and select **Tools** → **Tracking** → **Update Tasks** from the menu.
- **Update Resources:** In Resource Usage or Task Usage view, select **View** → **Table** → **Work** from the menu. Find the resource you want to update and update new actual work value.
- **Update Costs:** Turn off automatic cost updating: select **Tools** → **Options** from the menu, click the **Calculation** tab, uncheck the **Actual costs are always calculated by Microsoft Office Project** check box, and click **OK**. In **Task Usage** view, select **View** → **Table** → **Tracking** from the menu. Enter updated costs in the **Act. Cost** fields.
- **Check Project Variance:** In a task or resource view, select **View** → **Table** → **Variance** from the menu.

Balancing the Project

- **To Identify an Overallocated Resource:** Open **Resource Usage** view and select **Project** → **Filtered For** → **Overallocated Resources** from the menu.
- **To Balance Overallocated Resources Automatically:** Select **Tools** → **Level Resources** from the menu. Click the **Automatic** bullet and the **Level Entire Project** bullet, then click the **Level Now** button. Click the **Entire Pool** option and click **OK**.
- **To Reassign Work:** Open **Gantt Chart** view, select the overallocated resource and click the **Assign Resources button**. Select the overallocated resource, click the **Remove** button, select another resource and click **Assign**.

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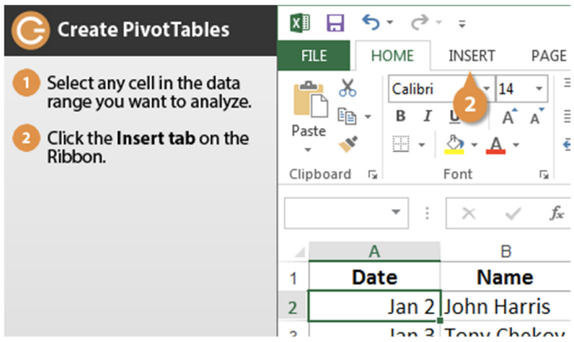

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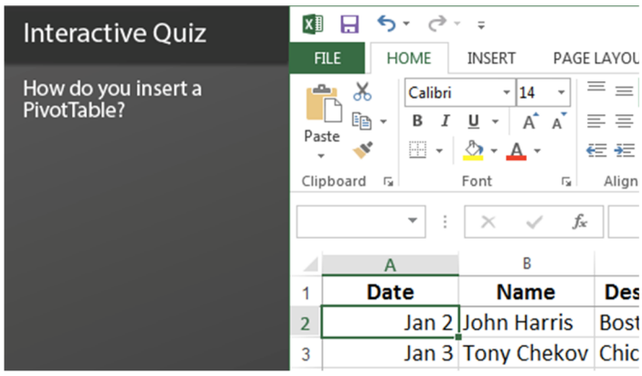

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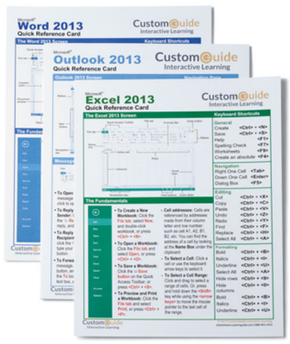

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