

Microsoft Office Project 2007 Step by Step

by Carl S. Chatfield and Timothy D. Johnson

Microsoft Press 2007 (560 pages)

ISBN: 9780735623057

Featuring easy-to-follow lessons and hands-on skill-building exercises, this guide will help you to learn the essentials for managing time, people, and budgets for projects large and small with Office Project 2007.

Table of Contents

[Microsoft Office Project 2007 Step by Step](#)

[Information for Readers Running Windows XP](#)

[Features and Conventions of This Book](#)

[Getting Help](#)

[Using the Book's CD](#)

[Quick Reference](#)

[Part 1 - Managing a Simple Project](#)

[Chapter 1 - Getting Started with Project](#)

[Chapter 2 - Creating a Task List](#)

[Chapter 3 - Setting Up Resources](#)

[Chapter 4 - Assigning Resources to Tasks](#)

[Chapter 5 - Formatting and Printing Your Plan](#)

[Chapter 6 - Tracking Progress on Tasks](#)

[Part 2 - Advanced Project Scheduling](#)

[Chapter 7 - Fine-Tuning Task Details](#)

[Chapter 8 - Fine-Tuning Resource and Assignment Details](#)

[Chapter 9 - Fine-Tuning the Project Plan](#)

[Chapter 10 - Organizing and Formatting Project Details](#)

[Chapter 11 - Printing Project Information](#)

[Chapter 12 - Sharing Project Information with Other Programs](#)

[Chapter 13 - Tracking Progress on Tasks and Assignments](#)

[Chapter 14 - Viewing and Reporting Project Status](#)

[Chapter 15 - Getting Your Project Back on Track](#)

[Part 3 - Special Projects](#)

[Chapter 16 - Applying Advanced Formatting](#)

[Chapter 17 - Customizing Project](#)

[Chapter 18 - Measuring Performance with Earned Value Analysis](#)

[Chapter 19 - Consolidating Projects and Resources](#)

[Part 4 - Introducing Project Server](#)

[Chapter 20 - Planning Work with Project Server](#)

[Chapter 21 - Tracking Work with Project Server](#)

[Chapter 22 - Managing Risks, Issues, and Documents with Project Server](#)

[Part 5 - Appendices](#)

[Appendix A](#) - A Short Course in Project Management

[Appendix B](#) - What's Next?

[Glossary](#)

[Index](#)

[Your All-in-One Resource](#)

[List of Figures](#)

[List of Examples](#)

[List of Sidebars](#)

[CD Content](#)

Back Cover

The smart way to learn Microsoft Office Project 2007-one step at a time!

Experience learning made easy-and quickly teach yourself how to manage your projects with Project 2007. With *Step By Step*, you set the pace-building and practicing the skills you need, just when you need them!

- Build a project plan and fine-tune the details
- Schedule tasks, assign resources, and manage dependencies
- Monitor progress and costs-and keep your project on track
- Format Gantt charts and other views to communicate project data
- Begin exploring enterprise project management systems

About the Authors

Carl S. Chatfield is a content project manager and trainer in Engineering Excellence, an organization within Microsoft that develops and promotes best practices among software engineering teams at Microsoft. Previously, Carl has worked on Office applications as a technical writer and documentation manager since 1991. Carl is a graduate of the Masters program in Technical Communication at the University of Washington and is certified as a Project Management Professional (PMP) by the Project Management Institute.

Timothy D. Johnson was a technical/developmental editor in the Microsoft Project User Assistance team for several years. Prior to joining the Project User Assistance team in 2000, he was a Project support professional for six years (going all the way back to Project 3.0-if you called Microsoft Product Support Services with a Project question, there's a good chance you talked to Tim). Tim is still involved in the computer industry and continues to look for ways to help customers better understand and use their computer applications.

Microsoft Office Project 2007 Step by Step

Carl Chatfield

Timothy Johnson

Microsoft

PUBLISHED BY

Microsoft Press

A Division of Microsoft Corporation

One Microsoft Way

Redmond, Washington 98052-6399

© 2007 by Carl Chatfield and Timothy Johnson

ISBN 9780735623057

All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means without the written permission of the publisher.

Library of Congress Control Number: 2006937716

1 2 3 4 5 6 7 8 9 QWT 2 1 0 9 8 7

Distributed in Canada by H.B. Fenn and Company Ltd.

A CIP catalogue record for this book is available from the British Library.

Microsoft Press books are available through booksellers and distributors worldwide. For further information about international editions, contact your local Microsoft Corporation office or contact Microsoft Press International directly at fax (425) 936-7329. Visit our Web site at www.microsoft.com/mspress. Send comments to mspinput@microsoft.com.

Microsoft, Microsoft Press, Active Directory, Excel, Internet Explorer, Outlook, PivotChart, PivotTable, PowerPoint, SharePoint, SQL Server, Visio, Visual Basic, Windows, and Windows Server are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

The example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred.

This book expresses the author's views and opinions. The information contained in this book is provided without any express, statutory, or implied warranties. Neither the authors, Microsoft Corporation, nor its resellers, or distributors will be held liable for any damages caused or alleged to be caused either directly or indirectly by this book.

- **Acquisitions Editor:** Juliana Aldous Atkinson
- **Developmental Editor:** Sandra Haynes
- **Project Editor:** Rosemary Caperton
- **Editorial Production Services:** Custom Editorial Productions, Inc.
- **Technical Reviewer:** Brian Kennemer

Body Part No. X12-65182

About the Authors

Carl S.Chatfield

Carl is a content project manager and trainer in Engineering Excellence, an organization within Microsoft that develops and promotes best practices among software engineering teams at Microsoft. Previously, Carl has worked on Office applications as a technical writer and documentation manager since 1991. Carl is a graduate of the Masters program in Technical Communication at the University of Washington and is certified as a Project Management Professional (PMP) by the Project Management Institute. He lives in Redmond, Washington.

Timothy D.Johnson

Tim was a technical/developmental editor in the Microsoft Project User Assistance team for several years.

Prior to joining the Project User Assistance team in 2000, he was a Project support professional for six years (going all the way back to Project 3.0-if you called Microsoft Product Support Services with a Project question, there's a good chance you talked to Tim). Tim is still involved in the computer industry and continues to look for ways to help customers better understand and use their computer applications. Tim makes his home in Issaquah, Washington.

Acknowledgements

From Carl: I'd like to thank the members and officers of the Puget Sound chapter of the Microsoft Project Association, our local Project user group. From Tim: thank you Ratsamy (Mimi), Brian, and Brenda. The authors also wish to acknowledge our technical reviewer Brian Kennemer, and Adrian Jenkins of the Project Business Unit at Microsoft, who provided valuable and timely answers to our technical questions.

Information for Readers Running Windows XP

The graphics and the operating system-related instructions in this book reflect the Windows Vista user interface. However, Windows Vista is not required; you can also use a computer running Microsoft Windows XP.

Most of the differences you will encounter when working through the exercises in this book on a computer running Windows XP center around appearance rather than functionality. For example, the Windows Vista Start button is round rather than rectangular and is not labeled with the word Start; window frames and window-management buttons look different; and if your system supports Windows Aero, the window frames might be transparent.

In this section, we provide steps for navigating to or through menus and dialog boxes in Windows XP that differ from those provided in the exercises in this book. For the most part, these differences are small enough that you will have no difficulty in completing the exercises.

Managing the Practice Files

The instructions given in the “[Using the Book's CD](#)” section are specific to Windows Vista. The only differences when installing, using, uninstalling, and removing the practice files supplied on the companion CD are the default installation location and the uninstall process.

On a computer running Windows Vista, the default installation location of the practice files is *Documents\Microsoft Press\Project 2007 SBS*. On a computer running Windows XP, the default installation location is *My Documents\Microsoft Press\Project 2007 SBS*. If your computer is running Windows XP, whenever an exercise tells you to navigate to your *Documents* folder, you should instead go to your *My Documents* folder.

To uninstall the practice files from a computer running Windows XP:

On the Windows taskbar, click the **Start** button, and then click **Control Panel**.

In **Control Panel**, click (or in Classic view, double-click) **Add or Remove Programs**.

In the **Add or Remove Programs** window, click **Microsoft Office Project 2007 Step by Step**, and then click **Remove**.

In the **Add or Remove Programs** message box asking you to confirm the deletion, click **Yes**.

Important If you need help installing or uninstalling the practice files, please see the “[Getting Help](#)” section later in this book. Microsoft Product Support Services does not provide support for this book or its companion CD.

Using the Start Menu

To start Microsoft Office Project 2007 on a computer running Windows XP:

- Click the **Start** button, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Project 2007**.

Folders on the Windows Vista Start menu expand vertically. Folders on the Windows XP Start menu expand horizontally. You will notice this variation between the images shown in this book and your Start menu.

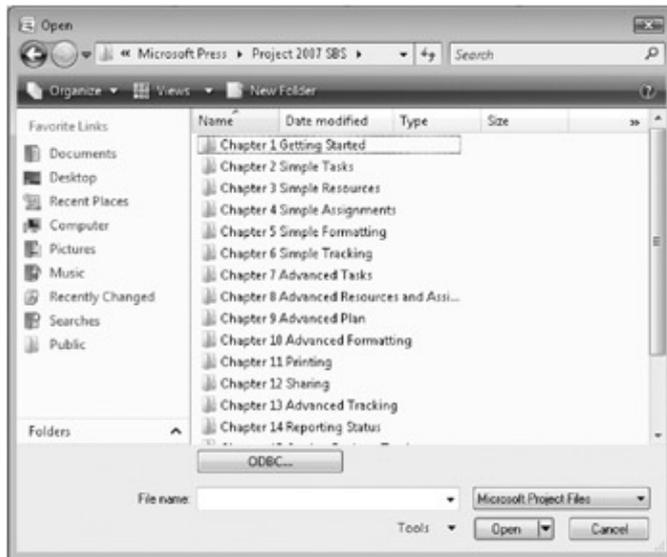




Navigating Dialog Boxes

On a computer running Windows XP, some of the dialog boxes you will work with in the exercises not only look different from the graphics shown in this book but also work differently. These dialog boxes are primarily those that act as an interface between Project and the operating system, including any dialog box in which you navigate to a specific location. For example, here are the Open dialog boxes from Project 2007 running on Windows Vista and Windows XP and some examples of ways to navigate in them.





To navigate to the **Chapter 2 Simple Tasks** folder in Windows Vista:

- In the **Favorite Links** pane, click **Documents**. Then in the folder content pane, double-click **Microsoft Press, Project 2007 SBS**, and double-click **Chapter 2 Simple Tasks**.

To move back to the **Project 2007 SBS** folder in Windows Vista:

- In the upper-left corner of the dialog box, click the **Back** button.

To navigate to the **Chapter 2 Simple Tasks** folder in Windows XP:

- On the **Places** bar, click **My Documents**. Then in the folder content pane, double-click **Microsoft Press, Project 2007 SBS**, and double-click **Chapter 2 Simple Tasks**.

To move back to the **Project 2007 SBS** folder in Windows XP:

- On the toolbar, click the **Up One Level** button.

Features and Conventions of This Book

Overview

This book has been designed to lead you step-by-step through all the tasks you are most likely to want to perform in Microsoft Office Project 2007. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to create and work with Project files. However, each topic is self contained. If you have worked with a previous version of Project, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you look up specific tasks in Project 2007:

- Detailed table of contents. Get an overview of which topics are discussed in which chapters.
- Chapter thumb tabs. Easily open the book at the beginning of the chapter you want.
- Topic-specific running heads. Within a chapter, quickly locate the topic you want by looking at the running head of odd-numbered pages.

- **Quick Reference.** Refresh your memory about a task while working with your own documents.
- **Detailed index.** Look up specific tasks and features in the index, which has been carefully crafted with the reader in mind.
- **Companion CD.** Use to install the practice files needed for the step-by-step exercises, but also as a source of other useful information, including an online, searchable version of this book.

In addition, we provide a glossary of terms for those times when you need to look up the meaning of a word or the definition of a concept.

You can save time when you use this book by understanding how the Step by Step series shows special instructions, keys to press, buttons to click, and so on.

Conventions and Their Meanings



This icon indicates a reference to the book's companion CD.

Be Sure To This paragraph preceding or following a step-by-step exercise indicates any prerequisite requirements that you should attend to before beginning the exercise, or actions you should take to restore your system after completing the exercise.

Open This paragraph preceding a step-by-step exercise indicates files that you should open before beginning the exercise.

Close This paragraph following a step-by-step exercise provides instructions for closing open files or programs before moving on to another topic.

Blue numbered steps guide you through step-by-step exercises and procedures in the “[Quick Reference](#).”

1

2

Black numbered steps guide you through procedures in sidebars and topic introductions.

See Also These paragraphs direct you to more information about a given topic in this book or elsewhere.

Troubleshooting These paragraphs explain how to fix a common problem that might prevent you from continuing with an exercise.

Tip These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options.

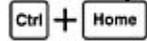
Important These paragraphs point out information that you need to know to complete a procedure. The first time you are told to click a button in an exercise, a picture of the button appears in the left margin. If



the name of the button does not appear on the button itself, the name appears under the picture.

In step-by-step exercises, keys you must press appear in key-shaped boxes. 

A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, “press  + ” means “hold down the  key while you press the  key.”



Program interface elements In steps, the names of program elements, such as buttons, commands, and dialog boxes, are shown in black bold characters.

User input Anything you are supposed to type appears in bold characters.

Glossary terms Terms that are explained in the glossary at the end of the book are shown in italic characters.

Getting Help

Every effort has been made to ensure the accuracy of this book and the contents of its companion CD. If you do run into problems, please contact the sources listed below for assistance.

Getting Help with This Book and Its Companion CD

If your question or issue concerns the content of this book or its companion CD, please first search the online Microsoft Press Knowledge Base, which provides support information for known errors in or corrections to this book, at the following Web site:

www.microsoft.com/mspress/support/search.asp

If you do not find your answer at the online Knowledge Base, send your comments or questions to Microsoft Press Technical Support at:

mspinput@microsoft.com

Getting Help with Project 2007

If your question is about Microsoft Office Project 2007, and not about the content of this Microsoft Press book, your first recourse is the Project Help system. This system is a combination of tools and files stored on your computer when you installed Project 2007 and, if your computer is connected to the Internet, information available from Microsoft Office Online. There are several ways to find general or specific Help information:

- To find out about an item on the screen, you can display a *ScreenTip*. For example, to display a ScreenTip for a button, point to the button without clicking it. The ScreenTip gives the button's name and the associated keyboard shortcut if there is one.
- In the Project program window, you can also type a question into the Search box in the upper right corner of the Project window. The Search box initially contains the text *Type a question for help*. You can also click the Microsoft Office Project Help command on the Help menu.
- After opening a dialog box, you can click the Help button to display the Project Help window with topics related to the functions of that dialog box already identified.

More Information

If your question is about Microsoft Office Project 2007 or another Microsoft software product and you cannot find the answer in the product's Help, please search the appropriate product solution center or the Microsoft Knowledge Base at:

support.microsoft.com

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

support.microsoft.com/gp/selfoverview/

Using the Book's CD

CD Content

The companion CD included with this book contains the practice files you'll use as you work through the book's exercises, as well as other electronic resources that will help you learn how to use Microsoft Office Project 2007.

What's on the CD?

The following table lists the practice files supplied on the book's CD.

Chapter	Files
Chapter 1: Getting Started with Project	(no practice file)
Chapter 2: Creating a Task List	Wingtip Toys Commercial 2a
Chapter 3: Setting Up Resources	Wingtip Toys Commercial 3a
Chapter 4: Assigning Resources to Tasks	Wingtip Toys Commercial 4a
Chapter 5: Formatting and Printing Your Plan	Wingtip Toys Commercial 5a, Logo.gif
Chapter 6: Tracking Progress on Tasks	Wingtip Toys Commercial 6a
Chapter 7: Fine-Tuning Task Details	Short Film Project 7a
Chapter 8: Fine-Tuning Resource and Assignment Details	Short Film Project 8a
Chapter 9: Fine-Tuning the Project Plan	Short Film Project 9a
Chapter 10: Organizing and Formatting Project Details	Short Film Project 10a
Chapter 11: Printing Project Information	Short Film Project 11a
Chapter 12: Sharing Project Information with Other Programs	Short Film Project 12a, Letter to Client.rtf, Sample Task Lists.xls
Chapter 13: Tracking Progress on Tasks and Assignments	Short Film Project 13a, Short Film Project 13b, Short Film Project 13c, Short Film Project 13d

Chapter 14: Viewing and Reporting Project Status	Short Film Project 14a
Chapter 15: Getting Your Project Back on Track	Short Film Project 15a
Chapter 16: Applying Advanced Formatting	Parnell Film 16a
Chapter 17: Customizing Project	Parnell Aerospace Promo 17a, Wingtip Toys Commercial 17b
Chapter 18: Measuring Performance with Earned Value Analysis	Short Film Project 18a
Chapter 19: Consolidating Projects and Resources	Wingtip Toys Commercial 19a, Parnell Aerospace Promo 19b
Chapter 20: Planning Work with Project Server	(no practice files)
Chapter 21: Tracking Work with Project Server	(no practice files)
Chapter 22: Managing Risks, Issues, and Documents with Project Server	(no practice files)

In addition to the practice files, the CD contains some exciting resources that will really enhance your ability to get the most out of using this book and Project 2007, including the following:

- *Microsoft Office Project 2007 Step by Step* in eBook format
- *Microsoft Computer Dictionary*, Fifth Edition eBook
- *First Look 2007 Microsoft Office System* (Katherine Murray, 2006)
- Sample chapter and poster from *Look Both Ways: Help Protect Your Family on the Internet* (Linda Criddle, 2007)

Important The companion CD for this book does not contain the Project 2007 software. You should purchase and install that program before using this book.

Minimum System Requirements

2007 Microsoft Office System

The 2007 Microsoft Office system includes the following programs:

- Microsoft Office Access 2007
- Microsoft Office Communicator 2007
- Microsoft Office Excel 2007
- Microsoft Office Groove 2007
- Microsoft Office InfoPath 2007
- Microsoft Office OneNote 2007
- Microsoft Office Outlook 2007
- Microsoft Office Outlook 2007 with Business Contact Manager
- Microsoft Office PowerPoint 2007
- Microsoft Office Publisher 2007
- Microsoft Office Word 2007

No single edition of the 2007 Office system installs all of the above programs. Specialty programs available separately include Microsoft Office Project 2007, Microsoft Office SharePoint Designer 2007, and Microsoft Office Visio 2007.

To run Project Standard or Professional, your computer needs to meet the following minimum requirements:

- 700 megahertz (MHz) processor or higher

- 512 megabytes (MB) RAM or higher
- CD or DVD drive
- 1.5 gigabyte (GB) hard disk space necessary for install; a portion of this disk space will be freed if you select the option to delete the installation files

Tip Hard disk requirements will vary depending on configuration; custom installation choices may require more or less hard disk space.

- Monitor with minimum 800×600 screen resolution; 1024×768 or higher recommended
- Keyboard and mouse or compatible pointing device
- Internet connection, 128 kilobits per second (Kbps) or greater, for download and activation of products, accessing Microsoft Office Online and online Help topics, and any other Internet-dependent processes
- Windows Vista or later, Microsoft Windows XP with Service Pack (SP) 2 or later, or Microsoft Windows Server 2003 or later
- Windows Internet Explorer 6.0 or later for Internet functionality

Installing the Practice Files

You need to install the practice files in the correct location on your hard disk before you can use them in the exercises. Follow these steps:

Remove the companion CD from the envelope at the back of the book, and insert it into the CD drive of your computer.

The Step By Step Companion CD License Terms appear. Follow the on-screen directions. To use the practice files, you must accept the terms of the license agreement. After you accept the license agreement, a menu screen appears.

Important If the menu screen does not appear, click the Start button and then click Computer. Display the Folders list in the Navigation Pane, click the icon for your CD drive, and then in the right pane, double-click the StartCD executable file.

Click **Install Practice Files**.

Click **Next** on the first screen, and then click **Next** to accept the terms of the license agreement on the next screen.

If you want to install the practice files to a location other than the default folder (*Documents\Microsoft Press\Project 2007 SBS*), click the **Change** button, select the new drive and path, and then click **OK**.

Important If you install the practice files to a location other than the default, you will need to substitute that path within the exercises.

Click **Next** on the **Choose Destination Location** screen, and then click **Install** on the **Ready to Install the Program** screen to install the selected practice files.

After the practice files have been installed, click **Finish**.

Close the **Step by Step Companion CD** window, remove the companion CD from the CD drive, and return it to the envelope at the back of the book.

Using the Practice Files

When you install the practice files from the companion CD that accompanies this book, the files are stored on your hard disk in chapter-specific subfolders under *Documents\Microsoft Press\Project 2007 SBS*. Each chapter includes a paragraph that lists the files needed for that exercise and explains any preparations needed before you start working through the exercise. Here is an example:

Open Short Film Project 9a from the *\Documents\Microsoft Press\Project 2007 SBS\Chapter 9 Advanced Plan* folder.

You can browse to the practice files in Windows Explorer by following these steps:

On the Windows taskbar, click the **Start** button, and then click **All Programs**.

Next, click **Microsoft Press**, click **Project 2007 Step By Step**, and then select a specific chapter folder.

Removing and Uninstalling the Practice Files

You can free up hard disk space by uninstalling the practice files that were installed from the companion CD. The uninstall process deletes any files that you created in the chapter-specific folders while working through the exercises. Follow these steps:

On the Windows taskbar, click the **Start** button, and then click **Control Panel**.

In **Control Panel**, under **Programs**, click the **Uninstall a program** task.

In the **Programs and Features** window, click **Microsoft Office Project 2007 Step by Step**, and then on the toolbar at the top of the window, click the **Uninstall** button.

If the **Programs and Features** message box asking you to confirm the deletion appears, click **Yes**.

Important Microsoft Product Support Services does not provide support for this book or its companion CD.

Quick Reference

1 Getting Started with Project

To Start Project Standard, [page 6](#)

On the Windows taskbar, click the **Start** button.

On the **Start** menu, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Project 2007**.

To start Project Professional and work offline, [page 12](#)

On the Windows taskbar, click the **Start** button.

On the **Start** menu, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Project 2007**.

If the Project Server Security Login dialog box appears, click **Cancel**.

In the Login dialog box, in the **Profile** box, select **Computer**, and then click **Work Offline**.

To create a project plan from a template, [page 15](#)

On the **File** menu, click **New**.

In the **New Project** task pane, under **Template**, click **On computer**.

In the Templates dialog box, click the **Project Templates** tab.

Click the template you want, and then click **OK**.

To switch to a different view, [page 17](#)

On the **View** menu, click the name of the view you want.

If the view is not listed, click **More Views**. In the More Views dialog box, click the name of the view you want, and click **Apply**.

To view a report in the Print Preview window, [page 23](#)

On the **Report** menu, click **Reports**.

Click a report category, or to see all reports, click **Custom**, and then click **Select**.

Select the report you want, and then click **Select** or **Preview**.

To create a visual report, [page 25](#)

On the **Report** menu, click **Visual Reports**.

Click a visual report tab, and then click the visual report you want.

Click **View**.

To create a new project plan and set its start date, [page 28](#)

On the **File** menu, click **New**.

In the **New Project** task pane, click **Blank Project**.

On the **Project** menu, click **Project Information**.

In the **Start Date** box, type or select the project start date you want.

Click **OK**.

To set nonworking time, [page 30](#)

On the **Tools** menu, click **Change Working Time**.

In the **For Calendar** box, select the base calendar you want to edit (normally **Standard**).

In the **Name** field on the **Exceptions** tab, enter a descriptive name for the nonworking time, such as **Holiday**.

In the **Start** and **Finish** fields, type or select the start and finish dates for the nonworking timespan.

Click **OK**.

To enter properties about a Project plan, [page 32](#)

On the **File** menu, click **Properties**.

In the Properties dialog box, click the **Summary** tab, and then enter the information you want.

2 Creating a Task List

To enter task names, [page 38](#)

In a task view, such as the Gantt Chart view, click a cell in the **Task Name** column.

Enter a task name and then press .

To enter task durations, [page 42](#)

In a task view, such as the Gantt Chart view, click a cell in the **Duration** column.

Type the task duration, and then press .

To enter a milestone, [page 44](#)

On the **Entry** table, enter a name for the milestone.

In the **Duration** field, type 0d, and then press .

To organize tasks into phases, [page 46](#)

Select the names of tasks that you would like to become subtasks of a summary task.

On the **Project** menu, point to **Outline**, and then click **Indent**.

To link adjacent tasks, [page 49](#)

Select the adjacent tasks.

On the **Edit** menu, click **Link tasks**.

To link nonadjacent tasks, [page 51](#)

Select the first task, which will be the predecessor task.

While holding down the **Ctrl** key, select the second task. This will be the successor task.

On the **Edit** menu, click **Link tasks**.

To enter a task note, [page 53](#)

Select the name of a task.

On the **Project** menu, click **Task Notes**.

In the **Notes** box, type the note you want, and then click **OK**.

To enter a task hyperlink, [page 54](#)

Select the name of a task.

On the **Insert** menu, click **Hyperlink**.

In the **Text to display** box, type the text you want to appear when you hover over the hyperlink.

In the **Address** box, type the destination hyperlink you want, and then click **OK**.

To check a project plan's duration and other statistics, [page 55](#)

On the **Project** menu, click **Project Information**.

In the Project Information dialog box, click **Statistics**.

To display the project's entire duration in the Gantt Chart view, [page 56](#)

On the **View** menu, click **Zoom**.

Click **Entire Project**, and then click **OK**.

3 Setting Up Resources

To set up work (people and equipment) resources, [page 61](#)

On the **View** menu, click **Resource Sheet** (or another resource view).

In the **Resource Name** field, enter the resource's name.

In the **Type** field, click **Work**.

In the **Max. Units** field, type or click the maximum capacity of this resource to accomplish any task.

Enter whatever other resource information would be useful to your project.

Repeat steps 2 through 5 for each resource.

To set up material resources, [page 66](#)

On the **View** menu, click **Resource Sheet**.

In the **Resource Name** field, enter the material resource's name.

In the **Type** field, click **Material**.

In the **Material Label** field, enter the unit of measure you want to use for this resource. For example, you might measure cement in pounds or tons.

In the **Std. Rate** field, enter the cost per unit of measure for this material resource.

Enter whatever other resource information would be useful for our project.

Repeat steps 2 through 6 for each material resource.

To set up cost resources, [page 67](#)

On the **View** menu, click **Resource Sheet**.

In the **Resource Name** field, enter the cost resource's name.

In the **Type** field, click **Cost**.

To enter work (people and equipment) resource pay rates, [page 68](#)

On the **View** menu, click **Resource Sheet**.

In the **Std. Rate** field, enter the resource's pay rate per standard pay period (such as hourly, weekly, or monthly).

If the resource should accrue overtime pay, enter his or her overtime pay rate in the **Ovt. Rate** field.

If the resource accrues a per-use cost, enter that amount in the **Cost/Use** field.

In the **Accrue At** field, click the method by which the resource accrues cost.

Repeat steps 2 through 5 for each resource.

To make a one-time adjustment to an individual resource's working time, [page 70](#)

On the **Tools** menu, click **Change Working Time**.

In the **For calendar** box, click the name of the resource whose working time you want to change.

In the **Name** field on the **Exceptions** tab, enter a descriptive name for the nonworking time, such as

Vacation.

In the **Start** and **Finish** fields, type or select the start and finish dates for the nonworking timespan.

Click **OK**.

To edit the regular work week for an individual resource, [page 72](#)

On the **Tools** menu, click **Change Working Time**.

In the **For calendar** box, click the name of the resource whose working time you want to change.

Click the **Work Weeks** tab in the Change Working Time dialog box.

Click **[Default]** or enter a new name and period, and then click **Details**.

Select the working time options you want for the work week, and then click **OK**.

To document resources with resource notes, [page 74](#)

Switch to a resource view, such as the Resource Sheet view.

Click the name of the resource for which you want to create a note.

On the **Project** menu, click **Resource Notes**.

In the Resource Information dialog box, type the note you want associated with this resource and then click **OK**.

4 Assigning Resources to Tasks

To assign resources to tasks, [page 79](#)

In a task view, such as the Gantt Chart view, on the **Tools** menu, click **Assign Resources**.

Click the name of the task to which you want to assign a resource.

In the **Resource Name** column of the Assign Resources dialog box, click a resource, and then click **Assign**.

To control how Project schedules the work on a task after assigning an additional resource, [page 86](#)

Assign an additional resource to a task.

Click the **Smart Tag Actions** button, and choose the action you want.

To assign material resources to tasks, [page 90](#)

On the **Standard** toolbar, click **Assign Resources**.

In the Gantt Chart view, click the name of the task to which you want to assign a material resource.

In the **Resource Name** column of the Assign Resources dialog box, click a resource, and in the **Units** column, enter the unit value you want

Press or click **Assign**.

To assign cost resources to tasks, [page 92](#)

On the **Standard** toolbar, click **Assign Resources**.

In the Gantt Chart view, click the name of the task to which you want to assign a cost resource.

In the **Resource Name** column of the Assign Resources dialog box, click a resource, and in the **Cost** column, enter the cost value you want.

Press or click **Assign**.

5 Formatting and Printing Your Plan

To display the project summary task, [page 99](#)

On the **Tools** menu, click **Options**.

In the Options dialog box, click the **View** tab.

Under the **Outline options for** label, select the **Show project summary task** check box, and then click **OK**.

To create a new view based on an existing view, [page 100](#)

On the **View** menu, click **More Views**.

In the More Views dialog box, click the view's name, and then click **Copy**.

In the View Definition dialog box, enter a name for the new view.

Click **OK**.

To format Gantt bars with the Gantt Chart Wizard, [page 101](#)

On the **Format** menu, click **Gantt Chart Wizard**.

Follow the instructions that appear on your screen.

To draw a text box on a Gantt chart, [page 106](#)

On the **View** menu, point to **Toolbars**, and then click **Drawing**.

On the **Drawing** toolbar, click the **Text Box** button, and then drag a small box anywhere on the chart portion of a Gantt Chart view.

In the box you just drew, type the text you want.

To format a category of text in a view, [page 109](#)

On the **Format** menu, click **Text Styles**.

In the **Item to Change** list, click the type of text you want to format

Select the font and other formatting options you want.

To format selected text in a view, [page 111](#)

Click the cell that contains the text you want to format

On the **Format** menu, click **Font**.

Select the font and other formatting options you want

To edit a report's header or footer, [page 112](#)

On the **Report** menu, click **Reports**.

Click a report category, or to see all reports, click **Custom**, and then click **Select**.

Select the report you want, and then click **Select** or **Preview**.

On the **Print Preview** toolbar, click **Page Setup**.

In the Page Setup dialog box, click the **Header** or **Footer** tab, and select the options you want.

6 Tracking Progress on Tasks

To set current values in a schedule as a baseline, [page 124](#)

On the **Tools** menu, point to **Tracking**, and then click **Set Baseline**.

Click **OK**.

To display the Variance table in the Task Sheet view, [page 124](#)

On the **View** menu, click **More Views** to display the More Views dialog box.

In the **Views** box, click **Task Sheet**, and click **Apply**.

On the **View** menu, point to **Table: Entry**, and click **Variance**.

To record project progress as scheduled, [page 126](#)

On the **Tools** menu, point to **Tracking**, and click **Update Project**.

In the Update Project dialog box, make sure the **Update work as complete through** option is selected. In the adjacent date list, type or click the date you want, and click **OK**.