Microsoft® Project 2007

Quick Reference Tutorial

RARE IT

Viewing the WBS Code

1. Switch to any table view.
2. Right-click a column header.
3. Click Insert Column.
4. Choose WBS for the field name.
5. Click OK.

	ℹ	MyWBS	Task Name
1		1	Screenplay
2		2	Script
3		3	Casting
4		4	Set Design
5		5	Set construction
6		6	⊟ Film Movie
7	✓	6.1	Scene1
8	✓	6.2	Scene2
9		6.3	⊟ Scene3
10	✓	6.3.1	Special Effects
11	✓	6.3.2	SoundTrack
12		6.3.3	Editing
13		7	Distribution
14		8	Publicity

Creating a Custom Filter

1. Click the Project menu.
2. Click Filtered For. Click More Filters.
3. Choose Task or Resource.
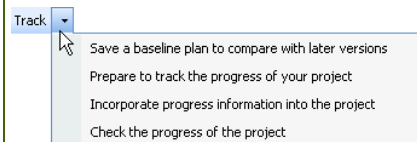4. Click New.
5. Enter your criteria.
6. Click OK.

Creating a Custom Toolbar

1. Right-click in a blank space beside the menu.
2. Click Customize.
3. Click the Toolbars tab.
4. Click New.
5. Enter a name for the toolbar.
6. Use the Commands tab of the Customize dialogue to add buttons to your toolbar.
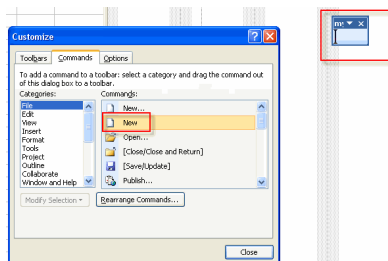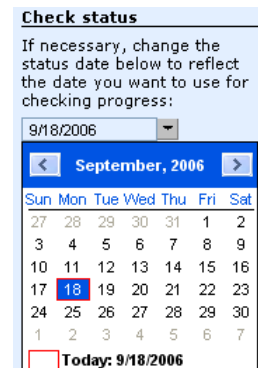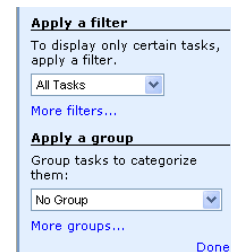
Using the Project Guide to Track Progress

1. Click the Track arrow.
2. Click "Check the progress of the project."

> Track
> Save a baseline plan to compare with later versions
> Prepare to track the progress of your project
> Incorporate progress information into the project
> Check the progress of the project

3. Specify a status date.

> **Check status**
> If necessary, change the status date below to reflect the date you want to use for checking progress:
> 9/18/2006
> September, 2006
> Today: 9/18/2006

4. Use filters and groups to gather data.

> **Apply a filter**
> To display only certain tasks, apply a filter.
> All Tasks
> More filters...
> **Apply a group**
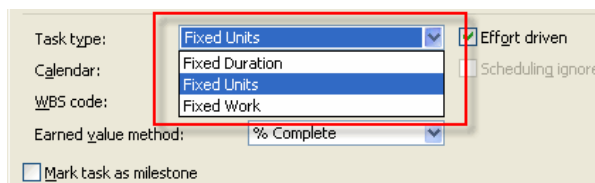> Group tasks to categorize them:
> No Group
> More groups...
> Done

Status Indicators

✓ Task is complete.

Task is not complete, but all scheduled work has been completed by the status date.

All scheduled work has not been completed by the status date.

Blank Task isn't scheduled to start until after the status date.

Task Type Overview

Task Type	Explanation	Must be Effort Driven?
Fixed Duration	Duration for these tasks will not change.	No
Fixed Units (Default Type)	This task's units will remain constant.	No
Fixed Work	This task's work will remain constant.	Yes

> Task type: Fixed Units — ☑ Effort driven
> Fixed Duration
> Fixed Units
> Fixed Work
> Calendar: — Scheduling ignores
> WBS code:
> Earned value method: % Complete
> ☐ Mark task as milestone

Creating and Using Cost Resources

- ✓ New addition to Project 2007.
- ✓ Like a fixed cost, a cost resource has no relationship to the work required for a task or the amount of work resources applied to the task.
- ✓ Unlike a fixed cost, multiple cost resources can be assigned to a task.
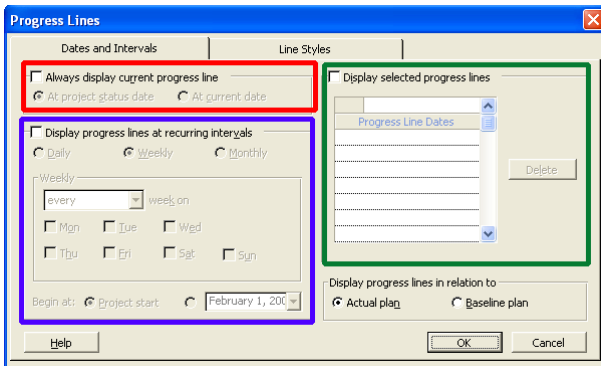
To create a cost resource:

1. Switch to Resource Sheet view.

2. Type the name for the resource.

3. Choose Cost for the resource type.

To use a cost resource:

1. Switch to Gantt Chart view.

2. Select a task.

3. Click the Tools menu and click Assign Resources.

4. Choose your cost resource.

5. Enter a monetary value.
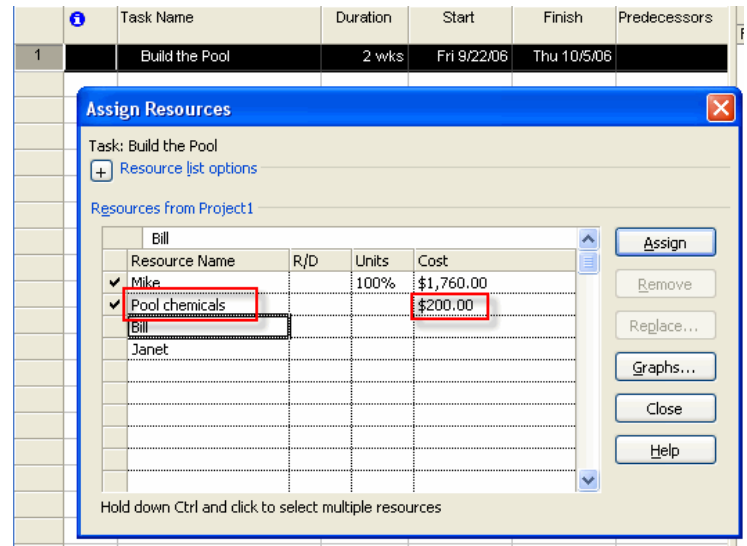
Progress Line Types

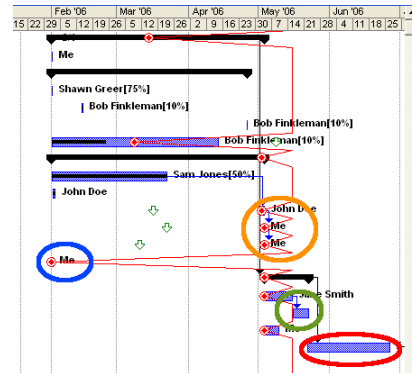| Permanent Progress Line (circled in red)	Choose to always display the current progress line, at the current date or the status date.
Recurring Progress Lines (circled in blue)	Choose a date to have a progress line appear at every day, week, or month.
Selected Progress Lined (circled in green)	Set specific dates to have progress lines appear.

Interpreting Progress Lines

Right-facing peaks (in orange)	Task is ahead of schedule.
Left-facing peaks (in blue)	Task is behind schedule.
Straight line (in green)	Task is on schedule.
Tasks untouched by the progress line (in red)	In the future, not affected by the progress line.

Linking a Project to a Resource Pool

1. Open the project.

2. Open the resource pool.

3. Click the Tools menu. Choose Resource Sharing and click Share Resources.

4. Choose "Use resources from..." and select your file.

5. Set precedence options. Click OK.

Unlinking a Project from a Resource Pool

1. Open the project.

2. Open the resource pool.

3. Click the Tools menu. Choose Resource Sharing and click Share Resources.

4. Choose "Use own resources."

5. Click OK.