

Module 2: Initializing a Project

Contents

Module Overview	1
Lesson 1: Creating and Configuring Calendars	2
How Calendars Work in Project 2010?.....	3
Creating a Base Calendar	5
Setting Working Hours and Days.....	6
Setting Non-Working Hours and Days.....	9
Setting Calendar Options	13
Saving the Calendar.....	15
Practice: Creating Calendars	16
Lesson 2: Configuring Schedule/Display Options	17
Understanding Duration vs. Work / Effort	18
What is Effort Driven Scheduling?.....	19
Understanding Task Types	20
Setting Schedule Options	22
Setting Display and General Options.....	24
Adding Project Information.....	27
Working with Timescale	29
Practice: Configuring Schedule/Display Options	31
Lesson 3: Creating and Saving a Project Schedule.....	32
Creating a New Project.....	33
Creating a Project from an Excel Workbook	35
Creating a Project from a SharePoint Task List	37
Importance of Naming Standards	38
Setting Read-Only and Password Attributes	39
Saving the Schedule	41
Save and Send Options.....	42
Practice: Creating and Saving a Project Schedule	44
Summary	45



PUBLISHED BY

MVP-Press Inc.
23 Eaglemere Drive
Winnipeg, Manitoba, Canada R2K 4K3

Copyright © 2010 by MVP-Press Inc.

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

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of MVP-Press Inc.

The names of manufacturers, products, or URLs are provided for informational purposes only and MVP-Press makes no representations and warranties, either expressed, implied, or statutory, regarding these manufacturers or the use of the products with any Microsoft technologies. The inclusion of a manufacturer or product does not imply endorsement of Microsoft of the manufacturer or product. Links are provided to third party sites. Such sites are not under the control of MVP-Press and MVP-Press is not responsible for the contents of any linked site or any link contained in a linked site, or any changes or updates to such sites. MVP-Press Inc. is not responsible for webcasting or any other form of transmission received from any linked site. MVP-Press is providing these links to you only as a convenience, and the inclusion of any link does not imply endorsement of MVP-Press of the site or the products contained therein.

MVP-Press may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from MVP-Press, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

MVP-Press and Professional Training Series are either registered trademarks or trademarks of MVP-Press Inc. in Canada, the United States and/or other countries.

Microsoft, Active Directory, Internet Explorer, Outlook, Project Server, SharePoint, SQL Server, Visual Studio, Windows and Windows Server are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

All other trademarks are property of their respective owners.

Authors: Ellen Lehnert, PMP, MCT, MCITP
Rolly Perreux, PMP, MVP, MCSE, MCT

Publisher: MVP-Press Inc.

Developmental Editor: Heather Perreux

Cover Graphic Design: Andrea Ardiles

Technical Reviewers:

Post Publication Technical Reviewers:

Module Overview

- Title of Lesson 1
- Title of Lesson 2
- Title of Lesson 3

**Module Slide
(Placeholder)**

When a new project schedule is to be created, it is important to prepare the schedule to receive the tasks and resources that you will be using during the project. When tasks are entered, calculations start running in the background and it is important that these calculations work the way you intend them to behave.

Each project has the ability to have its own unique set of options and values. With this in mind it is valuable to get the new project off to a good start by having the options and values correct for the unique project schedule being created.

In this module we will address the options, values and settings important to have in place BEFORE the first task is entered into your project schedule.

The objectives in the lesson are:

1. Creating and Configuring Calendars
2. Configuring Schedule/Display Options
3. Creating and Saving a Project Schedule

Heather Perreaux 4/1/10 4:09 PM

Deleted: your

Ellen Lehnert 7/3/10 5:30 PM

Comment [1]: done

Heather Perreaux 7/3/10 5:30 PM

Comment [2]: Needs to be reworded but I don't know exactly what the point is.

Ellen Lehnert 7/2/10 1:45 PM

Deleted: will react to the settings you will need for your projects. -

Heather Perreaux 4/1/10 6:10 PM

Deleted: -

Lesson 1: Creating and Configuring Calendars

- Title of Topic 1
- Title of Topic 2
- Title of Topic 3
- Title of Topic 4

***Lesson Slide
(Placeholder)***

Calendars in Project 2010 will determine when a task may be scheduled within the project schedule. It will also influence what defines a day, a week and a month. The calendars will also work hand-in-hand with the calendar options to determine when and how the tasks will be scheduled.

In this lesson we will explore:

1. How calendars work in [Project 2010](#)
2. How to create a base calendar
3. How to Set Working Hours and Days
4. How to Set Non-Working Hours and Days
5. How to Set Calendar Options

Heather Perreux 4/1/10 6:11 PM

Deleted: The c

Heather Perreux 4/1/10 4:13 PM

Deleted: MS

Heather Perreux 4/1/10 4:13 PM

Deleted: have

Heather Perreux 4/1/10 4:14 PM

Deleted: as to

Heather Perreux 4/1/10 4:15 PM

Deleted: MS Project 2010

How Calendars Work in Project 2010?

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

There are several types of calendars within the **Project 2010** system. The following are definitions of **available** calendars:

- **Base Calendar:** The **base** calendar which may be used to create other calendars. A base calendar may also be used as a Project, Resource or Task calendar.
- **Project Calendar:** The project calendar is the calendar assigned to a project and it **defines** the project working and non-working days. The default name for the Project Calendar is "Standard".
- **Resource Calendar:** Each resource will have **its** own calendar which may be based off of a base calendar or the project calendar. Unique resource calendars may also be created.
- **Task Calendar:** A task calendar is assigned to **a** task to allow for the scheduling of that task in a unique timeframe. For example: tasks which have to occur on a weekend.

How the calendars are used by the **software**:

RULE: A task will be scheduled based on the Project calendar until a resource is assigned to the task. At that time, the Resource calendar will control the scheduling of most tasks. **UNLESS** – there is a task calendar assigned which **will** override the Project and the Resource calendars.

When a project schedule is created, a default calendar of "Standard" is applied to the schedule. This is called the project calendar for the project. The default values on the Standard calendar are: Monday through Friday **which** are working days, and working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily. No holidays are **indicated** on the calendar. The Standard calendar is also the calendar that will be viewed in the background of the Gantt **Chart** **views**. The Calendar Options work hand in hand with the Project Calendar to

Heather Perreaux 4/1/10 4:15 PM
Deleted: MS Project 2010
Heather Perreaux 4/2/10 10:52 AM
Deleted: is the
Heather Perreaux 4/2/10 10:53 AM
Deleted: these
Heather Perreaux 4/2/10 10:53 AM
Deleted: that are available
Heather Perreaux 4/1/10 4:25 PM
Deleted: this is a
Heather Perreaux 4/1/10 4:25 PM
Deleted: will definition
Heather Perreaux 4/1/10 4:23 PM
Deleted: for
Heather Perreaux 4/1/10 4:23 PM
Deleted: what are the
Heather Perreaux 4/1/10 4:23 PM
Deleted: for the project
Heather Perreaux 4/1/10 4:24 PM
Deleted: their
Heather Perreaux 4/1/10 4:26 PM
Deleted: is a calendar which
Heather Perreaux 4/2/10 10:53 AM
Deleted: system
Heather Perreaux 7/3/10 5:30 PM
Comment [3]: Can? or Does/Will?
Ellen Lehnert 7/2/10 1:47 PM
Deleted: can
Ellen Lehnert 7/2/10 1:48 PM
Deleted: marked
Heather Perreaux 4/1/10 4:31 PM
Deleted: C
Ellen Lehnert 7/2/10 1:49 PM
Deleted: c

determine number of hours in a day or week and these values should be in sync with one another. The Calendar options will be discussed in the next section.

By default, 2 additional cal calendars are included in Project 2010; a 24 hour calendar and a Night Shift calendar. Either of these may be used as Project, Resource or Task calendars.

FAQ's:

Q: Why are there no holidays on the calendars?

A: This is an international program. Holidays vary from country to country.

Q: Is there the ability to add holidays to a calendar the way they can be added in Outlook?

A: No – this is not a capability of the software.

Q: Do I have to recreate the calendar for each project?

A: No – calendars may be created and saved through the Organizer to use in future projects.

TIP: The default calendar name for the system is “Standard”. If a different calendar name is selected, each Gantt view will also require changing because Gantt Chart views are set to display the Standard calendar. This change can be made by right clicking in the Gantt view and select Non-working time and changing to the calendar to be seen in the view. Most users keep the Standard calendar because of ease of use.

Heather Perreux 4/1/10 4:31 PM

Deleted: ,

Heather Perreux 4/1/10 4:31 PM

Deleted: each

Heather Perreux 4/1/10 4:31 PM

Deleted: discussion

Heather Perreux 4/1/10 4:32 PM

Deleted: the MS Project 2010

Heather Perreux 4/1/10 4:32 PM

Deleted: software

Heather Perreux 4/1/10 4:33 PM

Deleted: isn't

Heather Perreux 4/1/10 4:33 PM

Deleted: any

Heather Perreux 4/1/10 4:34 PM

Deleted: ystem

Heather Perreux 4/1/10 4:35 PM

Deleted: that I create

Heather Perreux 4/1/10 4:36 PM

Deleted: If you would prefer t

Ellen Lehnert 7/2/10 1:51 PM

Deleted: To use a

Ellen Lehnert 7/3/10 5:30 PM

Comment [4]: done

Heather Perreux 7/3/10 5:30 PM

Comment [5]: Why?

Heather Perreux 4/1/10 4:36 PM

Deleted: e

Heather Perreux 4/1/10 4:37 PM

Deleted: ing

Creating a Base Calendar

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

Creating a new base calendar gives you the ability to create a calendar with the unique values your projects require. The values of the Standard calendar are:

- Monday through Friday are working days
- Saturday and Sunday are non-working days
- Working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily
- No holidays

How to Create a New Base or copy an existing calendar:

1. Click **Project → Change Working Time**
2. Click **Create New Calendar** to the left side of the form
3. Enter in a calendar name in the name field (default name is Calendar 1)
4. Click **Create new base calendar** - OR -
Click **Make a copy of** and select an existing calendar
5. Click **OK** to close the form

Heather Perreaux 4/1/10 4:38 PM

Deleted: How to

Heather Perreaux 4/1/10 4:38 PM

Deleted: e

Heather Perreaux 4/1/10 4:39 PM

Deleted: would

Ellen Lehnert 7/2/10 1:55 PM

Deleted: standard values.

Ellen Lehnert 7/2/10 1:55 PM

Deleted: s

Ellen Lehnert 7/2/10 1:55 PM

Deleted: values are

Heather Perreaux 4/1/10 5:52 PM

Deleted: T

Heather Perreaux 4/1/10 5:51 PM

Deleted: c

Heather Perreaux 4/1/10 5:51 PM

Deleted: n

Heather Perreaux 4/1/10 5:51 PM

Deleted: b

Heather Perreaux 4/1/10 5:51 PM

Deleted: c

Ellen Lehnert 7/2/10 1:57 PM

Deleted: C

Heather Perreaux 4/1/10 5:52 PM

Deleted: on:

Heather Perreaux 4/1/10 5:19 PM

Deleted: On

Heather Perreaux 4/1/10 5:20 PM

Deleted: the left side of the form, c

Heather Perreaux 4/1/10 4:40 PM

Deleted: on

Ellen Lehnert 7/2/10 1:56 PM

Deleted: <#>Enter in a calendar name in the name field (default name is Calendar 1) ... [2]

Setting Working Hours and Days

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

After the **base** calendar has been created, decide what the working days (business days) of the project schedule will be. Decide **also**, how many hours will make up a working day and what times the hours will be. By default, the working days of the calendar are Monday through Friday and the working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily or 8 hours working per day.

Ask yourself, how many hours per day do you feel your resources work productively on project **work**?

The average amount of productive project time in a day for a full time resource is 6 to 6.5 hours. If you are planning projects using an 8 hour day and your resources produce 6.5 hours per day are you planning an unreasonable timeline for your project schedule. After resources are assigned to tasks, the resource availability calendar will be considered in the scheduling equation and the timeline for the project schedule will alter substantially. It is expected that schedules will double in length once actual resources are assigned to tasks.

This difference to the schedule may be handled through adjustments to the project calendar, to the assignments or to the resource calendars. Consider choosing one of the methods and using it as the standard for scheduling projects. Each of the above options has their pros and cons, but it is the crossing of methods that will result in unreliable results in planning a schedule.

To Change the Working Hours of all Days on a Calendar:

1. Click **Project** → **Change Working Time**
2. Check to ensure the calendar you wish to change is displayed in the **For calendar list**.
3. Click **Work Weeks** near the bottom of the dialogue box.

Heather Perreaux 4/1/10 4:44 PM

Deleted: How to

Heather Perreaux 4/1/10 4:45 PM

Deleted: you should ...ecide what the working ... [3]

Heather Perreaux 4/1/10 4:49 PM

Deleted: H...ow many hours per day do you f... [4]

Heather Perreaux 4/1/10 4:51 PM

Deleted: (FTE) ...esource working on a proje... [5]

Ellen Lehnert 7/2/10 2:04 PM

Deleted: Are...you are planning projects using ... [6]

Heather Perreaux 7/3/10 5:30 PM

Comment [6]: This needs to be better clarified. Perhaps using an example to support the point would help.

Heather Perreaux 7/3/10 5:30 PM

Comment [7]: Rule of thumb for what? I'm assuming it should probably read "rule of thumb for scheduling resources time is ..."

Ellen Lehnert 7/2/10 2:08 PM

Deleted: In fact, the rule of thumb

Ellen Lehnert 7/3/10 5:30 PM

Comment [8]: done

Ellen Lehnert 7/2/10 2:08 PM

Deleted: is at least

Heather Perreaux 4/1/10 5:02 PM

Deleted: a

Ellen Lehnert 7/2/10 2:08 PM

Deleted: double the value to the timeline if not more. If that is true, do you want to plan your projects at 8 hours a day?

Ellen Lehnert 7/2/10 7:40 PM

Deleted: adjustments ...o the assignments or ... [7]

Heather Perreaux 4/1/10 5:02 PM

Deleted: You should c...onsider picking ...ho... [8]

Ellen Lehnert 7/2/10 7:41 PM

Deleted: If your organization is using MS Project Server, a standard should be established for the entire organization.

Heather Perreaux 4/1/10 5:04 PM

Deleted: luse...os and minuses ...ons, but it is... [9]

Ellen Lehnert 7/2/10 7:41 PM

Deleted:

Heather Perreaux 4/1/10 5:53 PM

Deleted: c...hange the w...orking h...ou... [10]

Heather Perreaux 4/1/10 5:53 PM

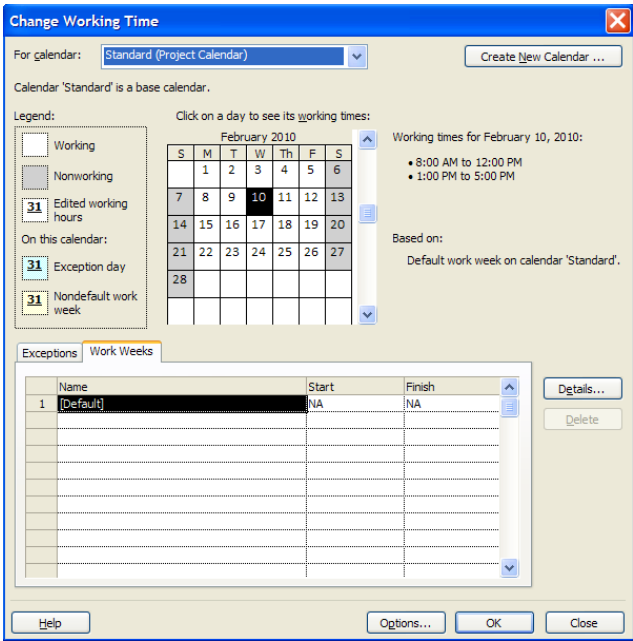
Deleted: on:

Heather Perreaux 4/1/10 5:06 PM

Deleted: make ...nsure that ...he calendar ... [11]

Heather Perreaux 4/1/10 6:12 PM

Deleted: on the tab near the bottom of the form called "...ork Weeks near the bottom of the ... [12]



1. After clicking on the **Work Weeks** tab, the word *Default* should be highlighted.
Click the **Details** button to the right of the form
2. Click **Monday**, press and hold the shift key and click on **Friday**. All of the working days will be selected
3. Click the **3rd** radio button, Set day(s) to these specific working times
4. You will see the standard working times. Make changes to reflect the new values
5. Click **Enter** or **Tab** to move away from the value you have changed
6. Click **OK** to close the form

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

Heather Perreaux 4/1/10 6:16 PM
Deleted: Click on

Heather Perreaux 4/1/10 5:19 PM
Deleted: "

Heather Perreaux 4/1/10 5:19 PM
Deleted: "

Heather Perreaux 4/1/10 5:11 PM
Deleted: on

Heather Perreaux 4/1/10 5:11 PM
Deleted: side

Heather Perreaux 4/1/10 6:13 PM
Deleted: .

TIP: Military time is valid when entering hour values. To change 5:00 pm to 4:00 pm to shorten the work day, simply enter **16** where 5:00 pm is located and click **Enter** or **Tab** and 4:00 pm will appear.

Ellen Lehnert 7/2/10 7:43 PM

Deleted: <#>Click on Click "Monday", press and hold down the shift key and click on Friday. All of the working days will be selected. ... [13]

Heather Perreux 4/1/10 5:13 PM

Deleted: the

Heather Perreux 4/1/10 5:14 PM

Deleted: . If you want to

Heather Perreux 4/1/10 5:14 PM

Deleted:

Heather Perreux 4/1/10 5:15 PM

Deleted: e

Heather Perreux 4/1/10 5:15 PM

Deleted: t

Setting Non-Working Hours and Days

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

Non-working time is defined in the **software** as **days where** work will not be planned or performed. Examples are: national and organizational holidays, training days, company shutdowns, summer hours, etc. Adding these non-working days and times to the project calendar will allow for the scheduling of the tasks to be excluded from these dates.

A frequently asked question is: Is there the ability to add holidays to a calendar the way they can be added in Outlook? The answer is no - this is not a capability of the **software**. However, **creating** recurring holidays and non-working times is a feature of **Project 2010**.

How to Create a Non-working Day for a Calendar:

1. Click **Project → Change Working Time**.
2. Check to **ensure** sure that the calendar you wish to change is **displayed** in the **For Calendar** field.
3. Click **Exceptions** tab near the bottom of the dialogue box.

Heather Perreaux 4/1/10 5:15 PM
Deleted: How to

Heather Perreaux 4/1/10 5:15 PM
Deleted: system

Heather Perreaux 4/1/10 5:16 PM
Deleted: those

Ellen Lehnert 7/2/10 7:45 PM
Deleted: system

Heather Perreaux 4/1/10 5:17 PM
Deleted: there is the ability to

Heather Perreaux 4/1/10 5:17 PM
Deleted: c

Heather Perreaux 4/1/10 4:15 PM
Deleted: MS Project 2010

Heather Perreaux 4/1/10 5:48 PM
Deleted: T

Heather Perreaux 4/1/10 5:48 PM
Deleted: c

Heather Perreaux 4/1/10 5:48 PM
Deleted: n

Heather Perreaux 4/1/10 5:48 PM
Deleted: d

Heather Perreaux 4/1/10 5:48 PM
Deleted: c

Heather Perreaux 4/1/10 6:14 PM
Deleted: on:

Heather Perreaux 4/1/10 6:13 PM
Deleted: ..

Heather Perreaux 4/5/10 8:57 AM
Deleted: make

Heather Perreaux 4/1/10 5:17 PM
Deleted: showing

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

Heather Perreaux 4/1/10 5:17 PM
Deleted: "

Heather Perreaux 4/1/10 6:13 PM
Deleted: ..

Heather Perreaux 4/1/10 6:14 PM
Deleted: on the tab near the bottom of the form called "

Heather Perreaux 4/1/10 5:18 PM
Deleted: "

[illegible]

4. In this example, we will set April 8, 2011 as a non-working day. Move the slider on the right side of the calendar down until **April 2011 is displayed in the calendar**.
5. Click **April 8, 2011**.
6. Click in the name field and enter a reason for the non-working day, ie: **Company holiday**.
7. Click **Enter**.
8. Repeat for additional non-working days. See the result below

Heather Perreaux 4/1/10 5:21 PM

Deleted: to be

Heather Perreaux 4/1/10 5:22 PM

Deleted: you see the

Heather Perreaux 4/1/10 5:22 PM

Deleted: .

Heather Perreaux 4/1/10 6:14 PM

Deleted: on

Heather Perreaux 4/1/10 6:14 PM

Deleted:

Heather Perreaux 4/1/10 6:14 PM

Deleted:

Heather Perreaux 4/1/10 6:14 PM

Deleted:

[illegible]

To Create a Recurring Non-working Day for a Calendar:

1. Click **Project** → **Change Working Time**
2. Check to make sure that the calendar you wish to change is showing in the **For calendar** field
3. Click **Exceptions** the tab near the bottom of the **dialogue box**
4. In this example, we will set January 1 (New Year's Day) **as a recurring** non-working day. Move the slider on the right side of the calendar down until **January 2013 is displayed on the** calendar.
5. Click **January 1, 2013**
6. Click in the **first open line in the Name** field and enter **New Year's Day** for the non-working day
7. Click **Enter**
8. Click back on the words **New Year's Day** and then click on the **Details** button to the right of the form.
9. Click **Yearly**
10. Click on **January 1**
11. Enter the start date
12. Enter a recurrence value or an End by date
13. Click **OK** to close box
14. Check for the recurrence values in the Exceptions line for New Year's Day.

Heather Perreaux 4/1/10 5:56 PM

Deleted: c...reate a r...ecurring n... [14]

Heather Perreaux 4/1/10 5:56 PM

Deleted: on:... ... [15]

Heather Perreaux 4/1/10 5:24 PM

Deleted: "...or C...alendar" ... [16]

Heather Perreaux 4/1/10 5:24 PM

Deleted: on ...he tab near the bottom ... [17]

Heather Perreux 4/1/10 5:25 PM

Deleted: to ...sbe...a recurring non-... [18]

Heather Perreaux 4/1/10 6:15 PM

Deleted: on

Ellen Lehnert 7/2/10 7:48 PM

Deleted:

Heather Perreaux 4/1/10 5:27 PM

Deleted: n...ame field and enter "... [19]

Heather Perreaux 4/1/10 5:27 PM

Deleted: "...ew Year's Day"...and ... [20]

Details for 'New Year's Day'

Set working times for these exceptions

☒ Nonworking
☐ Working times:

	From	To

Recurrence pattern

☐ Daily
☐ Weekly
☐ Monthly
☒ Yearly

☒ On January 1

☐ The First Tuesday of January

Range of recurrence

Start: Tue 1/1/13 ☐ End after: 6 occurrences
☒ End by: Tue 1/1/18

Help OK Cancel

Ellen Lehnert 7/2/10 7:48 PM

Deleted: <#>Click on the yYearly option ... [21]

Setting Calendar Options


- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide
(Placeholder)

The Calendar options work hand in hand with the project calendar to determine how tasks will be scheduled. It is imperative that the calendar options match the project calendar to create a consistency in the scheduling [values for tasks and assignment values](#).

To access the Calendar options:

Click **File** → **Options** → **Schedule**

 Change options related to scheduling, calendars, and calculations.

Calendar options for this project:

Project1

Week starts on: Sunday

Fiscal year starts in: January

☐ Use starting year for FY numbering

Default start time: 8:00 AM

Default end time: 5:00 PM

Hours per day: 8

Hours per week: 40

Days per month: 20

These times are assigned to tasks when you enter a start or finish date without specifying a time. If you change this setting, consider matching the project calendar using the Change Working Time command on the Project tab in the ribbon.

What the options mean:

- **Calendar options for this project:** option to select whether your option choices for the calendar will be held within an individual project or if they will be applied to all new projects.
- **Week starts on:** this choice will affect what is assigned and viewed as the first day of the week. The day chosen will be reflected on the Gantt Chart, Resource Usage,

Heather Perreaux 4/5/10 9:00 AM

Deleted: How to

Ellen Lehnert 7/2/10 7:54 PM

Deleted: of tasks.

Heather Perreaux 4/1/10 6:16 PM

Deleted: on

Heather Perreaux 4/1/10 5:58 PM

Deleted: s

Heather Perreaux 4/1/10 5:59 PM

Deleted: C

Ellen Lehnert 7/2/10 7:55 PM

Deleted: run

Heather Perreaux 4/1/10 5:59 PM

Deleted: on this system

Heather Perreaux 4/1/10 5:59 PM

Deleted: T

Heather Perreaux 4/1/10 5:59 PM

Deleted: You will see t

Heather Perreaux 4/1/10 6:00 PM

Deleted: choice

Ellen Lehnert 7/2/10 7:56 PM

Deleted: chart

Task Usage and other calendar views.

- **Fiscal Year starts in:** if using this option, select which month will be the start of the fiscal year.
- **Default start and end times:** these values should match the time values on the project calendar. Assigning the project calendar will be discussed in the next lesson. The times stated here will be used to schedule tasks when time is not specified for a task. It will also be used to schedule tasks that do not use relationships. For example: if recurring tasks are created, the tasks will always be scheduled at the start time represented in this option.
- **Hours per day:** when 1 day of work is scheduled, how many hours should 1 day consist of?
- **Hours per week:** when 1 week of work is scheduled, how many hours should 1 week consist of?
- **Days per month:** when 1 month of work is scheduled, how many days should 1 month consist of?

Heather Perreux 4/1/10 6:00 PM

Deleted: S

Heather Perreux 4/1/10 6:00 PM

Deleted: should

Heather Perreux 4/1/10 6:01 PM

Deleted: your

Heather Perreux 4/1/10 6:01 PM

Deleted: if you are using this option

Heather Perreux 4/1/10 6:02 PM

Deleted: are

Heather Perreux 4/1/10 6:02 PM

Deleted: ing

Heather Perreux 7/3/10 5:30 PM

Comment [9]: Should this say " at the start time represented in the recurring task(s) option"?

Ellen Lehnert 7/3/10 5:30 PM

Comment [10]: There is not a recurring tasks option.

Saving the Calendar

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

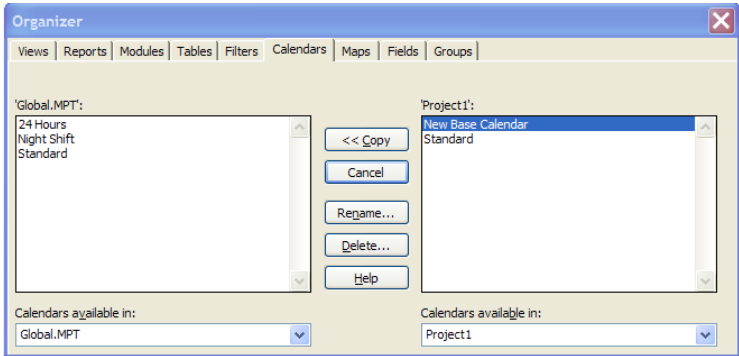
Topic Slide
(Placeholder)

In [Project 2010](#), the calendar that was just created is known as a “custom object”. Custom or customized objects may be saved for use in the project the object was created in and used in other projects as well. To save objects the Organizer is used. When [Project 2010](#) was installed on your system, a file named Global.mpt was created. The Organizer is the function that will copy objects into the Global.mpt as well as between project schedules. Calendars are only one of many object types that may be customized and saved for use in other project schedules. The other objects will be discussed in [Module 10](#). In this lesson, we will only address the Calendar.

To save the custom or customized calendar, the object must be copied using the Organizer.

To copy a New Base Calendar into the Global.mpt:

1. Click [File](#) → [Info](#) → [Organizer](#)
2. Click the [Calendars](#) tab
3. Click [New Base Calendar](#) to the right and click [<<Copy](#)
4. Click [Cancel](#) to close the box



The Calendar will be copied into your local Global.mpt.

Heather Perreaux 4/1/10 6:04 PM

Deleted: How to

Heather Perreaux 4/1/10 6:04 PM

Deleted: e

Ellen Lehnert 7/2/10 7:59 PM

Deleted: To

Heather Perreaux 4/1/10 4:15 PM

Deleted: MS Project 2010

Heather Perreaux 4/1/10 6:04 PM

Deleted: to be

Heather Perreaux 4/1/10 6:05 PM

Deleted: d

Ellen Lehnert 7/2/10 8:00 PM

Deleted: as the project the object was created in

Ellen Lehnert 7/2/10 8:01 PM

Deleted: he

Ellen Lehnert 7/2/10 8:01 PM

Deleted: ing

Ellen Lehnert 7/2/10 8:01 PM

Deleted: of

Ellen Lehnert 7/2/10 8:01 PM

Deleted: is a function of

Heather Perreaux 4/1/10 4:15 PM

Deleted: MS Project 2010

Ellen Lehnert 7/2/10 8:02 PM

Deleted: program

Ellen Lehnert 7/2/10 8:04 PM

Deleted: In future lessons of this course we will address

Heather Perreaux 4/1/10 6:05 PM

Deleted: the

Ellen Lehnert 7/2/10 8:04 PM

Deleted: other available objects.

Ellen Lehnert 7/2/10 8:04 PM

Deleted: the objects

Heather Perreaux 4/1/10 6:06 PM

Deleted: on

Heather Perreaux 4/1/10 6:06 PM

Deleted: on

Heather Perreaux 4/1/10 6:06 PM

Deleted: tab for

Ellen Lehnert 7/2/10 8:06 PM

Deleted: ... [22]

Practice: Creating Calendars

In this practice, you will:

- <action verb> Title of Exercise 1
- <action verb> Title of Exercise 2
- <action verb> Title of Exercise 3

**Practice Slide
(Placeholder)**

The Practice page is where you write detailed instructions for completing work listed as Exercises.

Type the Exercise Title and write a brief summary what the student will be doing in the exercise. Then list your ideas what they will be doing.

SAMPLE

In this practice you will create a Project Server Authentication profile and then configure the local cache settings in Project Professional 2007.

Exercise 1: Create Project Server Authentication Profile

In this exercise you will create Project Server authentication profile to connect to the Project Web Access site.

*Perform the following exercise on the **PS07** virtual machine.*

1. *From the **Start** menu, click **All Programs** → **Microsoft Office** → **Microsoft Office Tools** and click **Microsoft Office Project Server 2007 Accounts**.*
2. *In the **Project Server Accounts** dialog box, click **Add**.*
3. *In the **Account Properties** dialog box, and complete the following settings and click **OK**.*

Setting	Perform the following:
<i>Account Name</i>	<i>Type Project Server</i>
<i>Project Server URL</i>	<i>Type http://epm/pwa</i>
<i>When connecting</i>	<i>Select Use Windows user account</i>
<i>Set as default account</i>	<i>Select check box</i>

Lesson 2: Configuring Schedule/Display Options

- Title of Topic 1
- Title of Topic 2
- Title of Topic 3
- Title of Topic 4

**Lesson Slide
(Placeholder)**

Understanding the concepts that are the basis for [task and resource](#) scheduling using [Project 2010](#) will help [you](#) create schedules easier. The option choices [made](#) will depend on the project metrics requirements, the standards of [the](#) organization, and it will [control](#) standard values within the project schedule. Making educated decisions for these values is the objective of this lesson.

Topics in this lesson are:

1. Configuring Schedule/Display Options
2. Understanding Duration vs. Work / Effort
3. What is Effort Driven Scheduling
4. Understanding Task Types
5. [Setting](#) Schedule Options
6. [Setting](#) Display Options
7. Adding Project Information
8. Working with Timescale

Heather Perreaux 4/1/10 4:15 PM

Deleted: MS Project 2010

Heather Perreaux 4/2/10 6:59 AM

Deleted: you as a user

Ellen Lehnert 7/2/10 8:08 PM

Deleted: understand how to

Heather Perreaux 4/2/10 6:59 AM

Deleted: you

Heather Perreaux 4/2/10 6:59 AM

Deleted: k

Heather Perreaux 4/2/10 6:59 AM

Deleted: your

Ellen Lehnert 7/2/10 8:10 PM

Deleted: govern

Heather Perreaux 4/1/10 6:08 PM

Deleted: How to

Heather Perreaux 4/1/10 6:09 PM

Deleted: How to

Understanding Duration vs. Work / Effort

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

To understand [Project 2010](#)'s schedule engine it is helpful to understand the terms "Duration" and "Work" which is fundamental to understanding project scheduling.

Definitions:

- Duration is a length of time ie: a day, a week, or a month
- Work is the quantity of work that occurs ie: 8 hours in one day, 40 hours in a week

For example:

How many people are in this room? _____

How long are we here for today? _____

Number of people in the room x number of hours in the day

= Quantity of work performed today.

If more people come in the room, will the duration [of the class day](#) change? No

Will the number of hours of work change? Yes [because more people are working](#)

The number of hours of work is a function of how many people are performing the work and might not affect the duration of a task.

Work and effort are interchangeable terms. In [Project 2010 Help, and other](#) reference books, you will see work referred to as effort.

Heather Perreux 4/1/10 4:15 PM

Deleted: MS Project 2010

Heather Perreux 4/1/10 6:10 PM

Deleted: .

Ellen Lehnert 7/2/10 8:12 PM

Deleted: .

Heather Perreux 4/1/10 4:15 PM

Deleted: MS Project 2010

Heather Perreux 4/2/10 10:55 AM

Deleted: h

Heather Perreux 4/2/10 7:09 AM

Deleted: as well as in

Heather Perreux 4/2/10 7:10 AM

Deleted:

What is Effort Driven Scheduling?

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

Tasks have the option of being scheduled using Effort-driven scheduling. Effort-driven is defined as when more workers are added, the effort (or work) will be divided across the workers.

For example: A project has a task called “Moving boxes”. The work of the task is to move 100 boxes from location A to B. If one person moves the boxes, it will take 10 hours of duration. However, if 2 people move the boxes it will take 5 hours, 3 people can accomplish this task in one-third of the original time, etc. In theory, if 100 people move the boxes, we will get the task completed in a few minutes. In this scenario, however, all work is equal. Does it matter which box a worker moves? If one worker becomes unavailable, can the other workers move the rest of the boxes? This is effort-driven scheduling.

Another example is driving a car: If it takes 5 hours to get from point X to point Y, can you get there faster if you add more drivers to the car? This task by nature is not effort-driven because there is really only one worker who can perform the task at a time.

The following examples show that effort-driven scheduling will not apply to all tasks. Each task should be examined to determine if effort-driven scheduling applies and the setting altered on a task by task basis.

Heather Perreaux 4/2/10 7:44 AM

Deleted: over

Ellen Lehnert 7/2/10 8:14 PM

Deleted: It will work for this type of task but there would be a limit to the number of workers. At some point you will create a diminishing returns situation.

Ellen Lehnert 7/2/10 8:14 PM

Deleted: another

Ellen Lehnert 7/2/10 8:14 PM

Deleted: worker

Heather Perreaux 4/2/10 7:18 AM

Deleted: se

Heather Perreaux 4/2/10 7:18 AM

Deleted: see

Understanding Task Types

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

Each task will be assigned a task type when the task is added to the schedule. Task types work hand-in-hand with the effort-driven option discussed on the previous page. Task types determine how a task is scheduled and will have an effect on the assignment of the resources. Task types should be considered unique per task and should be set on a task by task basis.

The software allows for the following 3 task types:

- **Fixed Duration:** A fixed duration task is a task created with a fixed length of time. Fixed Duration tasks are also tied to dates.

Example: This training class. When the time for the class is over, the work of the class is completed. If someone leaves the class for a meeting, they cannot come the day after the class is completed to make up the work they missed.

- **Fixed Units:** Units means quantity of resource. Fixed Units means that the resource assignment quantity is fixed for the task. Using this task type will result in the quantity of the units assigned to a task coupled with the availability of the resource to determine the scheduling of the task.

Example: If it takes 5 hours to drive from point X to point Y, and the driver (the resource) is available for the full 5 hours per day, it will take 1 day to get from point X to point Y. If the driver is available for 2 and a half hours per day or 50% of his availability, it will take 2 days to drive the same distance. If the driver is available for only 1 hour per day (20%), it will take 5 days to drive from point X to point Y. If there is a weekend in the middle of the task and a non-working day for the resource, it could take a lot longer to get to point Y.

- **Fixed Work:** The work of the task is fixed. Fixed work tasks, by default, are also effort-driven. The more resources assigned to the task, the less time the task will take to be completed. Fixed work tasks will be scheduled based on the quantity of the units of the resources assigned to the task and their availability based on their resource calendar.

Heather Perreux 4/2/10 7:19 AM

Deleted: will

Heather Perreux 4/2/10 7:19 AM

Deleted: will

Heather Perreux 4/2/10 7:19 AM

Deleted: to the task

Heather Perreux 4/2/10 10:55 AM

Deleted: system

Heather Perreux 4/2/10 7:35 AM

Deleted: when I have full

Heather Perreux 4/2/10 7:36 AM

Deleted: access to the driver (the resource), i

Heather Perreux 4/2/10 7:38 AM

Deleted: if I only have the driver for 50% of their availability or 2.5 hours per day.

Heather Perreux 4/2/10 7:38 AM

Deleted: I could only get

Heather Perreux 4/2/10 7:38 AM

Deleted: one-fifth of their availability, the driver could only drive 1 hour per day and

Heather Perreux 4/2/10 7:40 AM

Deleted: would

Heather Perreux 4/2/10 7:40 AM

Deleted: Add to that

Heather Perreux 4/2/10 7:41 AM

Deleted: by default

Example: If a task called “Plan event”, and has 80 hours of work, the work will be completed in 2 weeks with 1 full time resource. If a second resource is added full time, the task will be completed in 1 week. Each resource would have performed 50% of the work. The more resources, the faster the work is completed.

When task types are coupled with the effort-driven option, the scheduling engine allows for 5 combinations of task type, effort-driven combinations:

- Fixed Duration, Effort-driven on
- Fixed Duration, Effort-driven off
- Fixed Units, Effort-driven on
- Fixed Units, Effort-driven off
- Fixed Work, Effort-driven on

The project options will allow for setting a default that each task will be assigned when the task is entered. It should be noted that each task is different and unique. The default should be considered a starting point. The schedule developer should get to know the tasks and the work of the tasks and reset the task type and effort-driven options on a task by task basis.

Heather Perreaux 4/2/10 7:42 AM

Deleted: which

Ellen Lehnert 7/3/10 5:30 PM

Comment [11]: fixed

Heather Perreaux 7/3/10 5:30 PM

Comment [12]: Should this draw a comparison between resources that are available for a full 8 hours per day vs say 4 hours per day, then how many days will it take to complete the task?

Ellen Lehnert 7/2/10 8:20 PM

Deleted: faster with more resources assigned. However, if each resource is assigned at 50% of their availability, it could take

Heather Perreaux 4/2/10 7:43 AM

Deleted: e

Ellen Lehnert 7/2/10 8:21 PM

Deleted: longer

Ellen Lehnert 7/2/10 8:21 PM

Deleted: .

Ellen Lehnert 7/2/10 8:22 PM

Deleted: decide and

Setting Schedule Options

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

Scheduling options are per project options which establish the defaults how a project will be scheduled. These options are unique per project and should be checked before entering tasks into a project schedule. These options also may be changed at any time over the life of the project schedule.

To set the scheduling options:

Click **File → Options → Schedule**

Schedule

☒ Show scheduling messages ⓘ

Show assignment units as: **Percentage** ▾

Scheduling options for this project: **Project1** ▾

New tasks created: **Manually Scheduled** ▾

Auto scheduled tasks scheduled on: **Project Start Date** ▾

Duration is entered in: **Days** ▾

Work is entered in: **Hours** ▾

Default task type: **Fixed Units** ▾

☐ New tasks are effort driven ⓘ ☒ Tasks will always honor their constraint dates ⓘ
☐ Autolink inserted or moved tasks ⓘ ☒ Show that scheduled tasks have estimated durations ⓘ
☒ Split in-progress tasks ⓘ ☒ New scheduled tasks have estimated durations
☒ Update Manually Scheduled tasks when editing links ☐ Keep task on nearest working day when changing to Automatically Scheduled mode

Schedule Alerts Options: **Project1** ▾

☒ Show task schedule warnings
☐ Show task schedule suggestions

Heather Perreaux 4/2/10 7:46 AM

Deleted: How to

Ellen Lehnert 7/3/10 2:57 PM

Deleted: -

Ellen Lehnert 7/3/10 5:30 PM

Comment [13]: done

Heather Perreaux 7/3/10 5:30 PM

Comment [14]: Shouldn't there be a lead in here?

Ellen Lehnert 7/3/10 2:57 PM

Deleted: -

Heather Perreaux 4/1/10 6:17 PM

Deleted: on

- **Show scheduling messages:** gives the scheduler error messages concerning scheduling inconsistencies and warnings.
- **Show assignment units as a:** options are percentage or decimal. This is user preference. It may be changed at any time without affecting the schedule.
- **Scheduling options for this project:** options that can be assigned to a specific project or all projects.
- **New tasks created:** manually scheduled or automatically scheduled. This is the default value and may be adjusted per task.
 - **Manually scheduled:** tasks will be entered without a start or finish date and without task duration. All values are entered manually. ▼
 - **Auto scheduled:** tasks will be entered with a default duration of 1 day and a start and finish date. ▼
- **Auto scheduled tasks scheduled on:** project state date or current date. If you are managing a long project, it might be easier to change this option for all new tasks to start on the current date. ▼
- **Duration is entered in:** minutes, hours, days, weeks, months
- **Work is entered in:** minutes, hours, days, weeks, months
- **Default task type:** Fixed Units, Fixed Duration, or Fixed Work
- **New tasks are effort driven:** check for yes
- **Update Manually Scheduled tasks when updating links:** when tasks are manually scheduled should the project schedule successor tasks based on relationship links

TIP: it is a good idea within an organization to establish a standard for Duration and Work. When duration is discussed or appears on a report it will be easier for stakeholders to understand that duration always means hours or the value that works for the specific project. If you have a 3 year project, you probably will not be planning work at the hour level so weeks might be the duration standard.

Ellen Lehnert 7/2/10 8:23 PM	Deleted: .
Heather Perreux 4/2/10 7:53 AM	Deleted: this option will
Heather Perreux 4/2/10 7:54 AM	Deleted: no
Heather Perreux 4/2/10 7:54 AM	Deleted: e
Heather Perreux 4/2/10 7:54 AM	Deleted: to
Heather Perreux 4/2/10 7:54 AM	Deleted: A
Heather Perreux 4/2/10 7:55 AM	Deleted: the options may be retained for
Heather Perreux 4/2/10 7:57 AM	Deleted: M
Heather Perreux 4/2/10 7:57 AM	Deleted: T
Ellen Lehnert 7/2/10 10:03 PM	Deleted: schedule dates and will not be subject to re-scheduling during tracking .
Ellen Lehnert 7/3/10 3:20 PM	Deleted: matic
Ellen Lehnert 7/3/10 3:20 PM	Deleted: scheduling
Heather Perreux 4/2/10 7:57 AM	Deleted: T
Ellen Lehnert 7/2/10 10:04 PM	Deleted: scheduled based on relationships and will be responsive to re-scheduling during tracking.
Heather Perreux 4/2/10 7:57 AM	Deleted: P
Ellen Lehnert 7/3/10 3:21 PM	Deleted: year
Ellen Lehnert 7/3/10 3:21 PM	Deleted: in duration
Heather Perreux 4/2/10 7:57 AM	Deleted: long project
Ellen Lehnert 7/3/10 3:21 PM	Deleted: and you
Ellen Lehnert 7/2/10 10:06 PM	Deleted: add a task, where should the task go?
Heather Perreux 4/2/10 7:58 AM	Deleted: M
Heather Perreux 4/2/10 7:58 AM	Deleted: M
Ellen Lehnert 7/3/10 3:23 PM	Deleted: situation
Ellen Lehnert 7/2/10 10:10 PM	Deleted: it

Setting Display and General Options

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

General options are options which affect how the installation of Project 2010 on a desktop will operate. Display options are options that will help the user interface with Project 2010 software. The options selected are unique to each user and are a personal preference. These options do not have an influence on the ability to create a project schedule.

To navigate to General options:

Click **File** → **Options** → **General**

In the Project view section, the user may select the default view for usage of Project 2010 and the date format for dates for reports and views (tables).



General options for working with Project.

User Interface options

☒ Always use ClearType

Color scheme: Silver

ScreenTip style: Show feature descriptions in ScreenTips

Project view

Default view: Gantt with Timeline

Date format: Wed 1/28/09

Personalize your copy of Microsoft Office

User name: Ellen Lehnert

Initials: ERL

Heather Perreux 4/2/10 7:59 AM

Deleted: How to

Ellen Lehnert 7/3/10 3:10 PM

Deleted:

Heather Perreux 4/2/10 7:59 AM

Deleted: The d

Heather Perreux 4/1/10 4:15 PM

Deleted: MS Project 2010

Heather Perreux 4/2/10 8:00 AM

Deleted: options

Ellen Lehnert 7/3/10 3:12 PM

Deleted: t

Heather Perreux 4/2/10 10:56 AM

Deleted: access the

Heather Perreux 4/2/10 10:56 AM

Deleted:

Ellen Lehnert 7/2/10 10:11 PM

Deleted: Display

Heather Perreux 4/1/10 6:17 PM

Deleted: on

Ellen Lehnert 7/2/10 10:11 PM

Deleted: General:


Ellen Lehnert 7/2/10 10:12 PM

Deleted: In the Project view section, the user may select the default view for usage of MS Project 2010Project 2010 and the date format for dates for reports and views (tables).

To navigate to Display options:

Click **File** → **Options** → **Display**.

These options refer to which elements should be viewed on the screen. These options will control which indicators are shown in the indicator column, currency values and if the Entry bar is visible or not.

 Change how Project content is displayed on the screen.

Calendar

Calendar Type: Gregorian Calendar

Currency options for this project: Project1

Symbol: \$ Decimal digits: 2

Placement: \$1 Currency: USD

Show indicators and options buttons for:

☒ Resource assignments ☒ Edits to work, units, or duration

☒ Edits to start and finish dates ☒ Deletions in the Name columns

Show these elements:

☒ Entry bar

Additional display options are available at:

Click **File** → **Options** → **Advanced**

Some of the options that should be considered are:

- **Show this number of recent documents** – optional number, list will show in the Recent tab in the backstage
- **Automatically add new views, tabs, filters and groups to the global - recommended**
- **Settings for duration label values** – Minutes, Days, etc. - may alter as needed
- **Show project summary task** – recommended

Ellen Lehnert 7/2/10 10:12 PM

Deleted: -
More Display options are available at: -

Ellen Lehnert 7/3/10 3:12 PM

Deleted: More Display options are available at:

Heather Perreux 4/2/10 8:01 AM

Deleted: :

Ellen Lehnert 7/2/10 10:13 PM

Deleted: -

Display

- Show this number of recent documents: 17
- ☒ Show status bar
 - ☒ Show scroll bars
 - ☒ Show windows in Taskbar
 - ☒ Show OLE links indicators
 - ☒ Use internal IDs to match different-language or renamed Organizer items between projects
 - ☒ Automatically add new views, tables, filters, and groups to the global
 - ☒ Show bars and shapes in Gantt views in 3-D

Display options for this project:

Project1

- Minutes: min Weeks: wk
- Hours: hr Months: mon
- Days: day Years: yr
- ☒ Add space before label
 - ☐ Show project summary task
 - ☒ Underline hyperlinks
- Hyperlink color: Followed hyperlink color:

Best practice: Each project schedule has the ability to contain a Project Summary task. The Project Summary task is a zero level task that will serve as a constant grand total for the project schedule. [The setting in the above options may be used to turn on the project summary task or use the directions below.](#)

To turn on the Project Summary task:

[Click Task → Gantt Chart](#)

Click [Format → Project Summary Task](#) (on the right side of the ribbon)

Ellen Lehnert 7/2/10 10:13 PM

Deleted: These options refer to which elements should be viewed on the screen. It can help you control which indicators are shown in the indicator column and if you would like to view the Entry bar is visible or not.

Heather Perreux 4/1/10 6:17 PM

Deleted: on

Ellen Lehnert 7/2/10 10:15 PM

Deleted: task

Adding Project Information

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

The final project [information](#) that should be entered before proceeding with project schedule development is the project start or project finish date as well as indicating which calendar will be [used as](#) the project calendar. This information is entered through the Project Information [box](#).

To [navigate to the Project Information dialogue box](#):

Click [Project](#) → [Project Information](#).

Deciding whether to enter the Project Start date or the Project Finish date will take some consideration. There are pros and cons to either choice:

FAQ: [Should I enter a project start and finish date?](#)

Answer: [Project 2010 will accept either the start or the finish date but not both.](#)

Entering a start date will indicate that you are planning your schedule as forward scheduling. This will result in:

- All tasks will be scheduled As soon as possible
- The work of the project will determine the project ending date
- You will have a date to manage to and know when you are on time or late with the progress of the project

Entering a finish date will indicate that you are planning your schedule as backward scheduling. This will result in:

- All tasks will be scheduled As late as possible
- The ending date of the project will be locked to a date on the calendar
- You might be planning a project where each task will be required to be completed as planned to achieve the ending date goals. ▼

The most used planning method is [that projects are planned from the project start date](#).

Ellen Lehnert 7/2/10 10:26 PM
Deleted: level information
Heather Perreaux 4/2/10 8:04 AM
Deleted: are
Heather Perreaux 4/2/10 8:04 AM
Deleted: entry of the
Ellen Lehnert 7/2/10 10:27 PM
Deleted: set
Heather Perreaux 4/2/10 8:04 AM
Deleted: to be
Ellen Lehnert 7/2/10 10:27 PM
Deleted: form
Heather Perreaux 4/2/10 10:57 AM
Deleted: get to
Heather Perreaux 4/2/10 10:57 AM
Deleted: form:
Heather Perreaux 4/1/10 6:18 PM
Deleted: on
Ellen Lehnert 7/2/10 10:33 PM
Deleted: - ... [23]
Heather Perreaux 4/2/10 8:06 AM
Deleted: s
Ellen Lehnert 7/2/10 10:29 PM
Deleted: How many projects are performed exactly as planned?
Heather Perreaux 7/3/10 5:30 PM
Comment [15]: I think this is supposed to say project projects from the start date?
Ellen Lehnert 7/3/10 5:30 PM
Comment [16]: fixed
Ellen Lehnert 7/2/10 10:30 PM
Deleted: to project projects from the state date.

Project Calendar: The default calendar is “Standard”. Whatever calendar is selected will become the scheduling calendar for the project. All tasks will be scheduled using this calendar until a resource is assigned to the task.

Click **OK** to close the box.

Project Information for 'Project2'

Start date: 2/28/10 Current date: 2/28/10

Finish date: 2/28/10 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

TIP: Most project managers have definite deadlines. Consider planning the schedule from ending date to get the schedule short term goals, deadlines and milestone dates. Then switch the project to the start date to manage. Reset the constraints to as soon as possible to enable the schedule to include slack and aid in schedule management.

Ellen Lehnert 7/2/10 10:32 PM

Deleted: .

... [24]

Heather Perreux 4/2/10 8:08 AM

Deleted: to

Heather Perreux 4/2/10 8:09 AM

Deleted: have

Heather Perreux 4/2/10 8:09 AM

Deleted: to

Heather Perreux 4/2/10 8:09 AM

Deleted: the

Heather Perreux 4/2/10 8:09 AM

Deleted: of the schedule

Working with Timescale

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

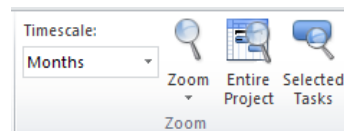
Timescale is the calendar density that is viewed in all Gantt Charts, Resource Usage, Task Usage and other calendar based views. It is the calendar line that runs on the right side above the Gantt bars at the top of the view. Adjustments to the timescale will allow for viewing time in different time increments such as by week by day or by month by week. As views are changed, the timescale should be adjusted to fit your needs.

Project 2010 provides several methods to adjust the timescale:

The easiest way to adjust the scale is new to Project 2010. Use the sliding adjustment in the lower right corner of any view.



Another way to change the timescale is on the View tab on the ribbon. On the right side are adjustments for the timescale:



More detail about defining the timescale can be found in the Timescale dialogue box. Double click on the timescale (the date line above the Gantt bars) and the dialogue box below will appear:

For project schedules using a fiscal year: under **Timescale options**, **Show**: select **Three tiers** and define the top or third tier. Adjusting the timescale using this form will work best starting at the Bottom Tier and working your up way through the Middle and Top Tiers at avoid errors. As changes are made, a sample of the result in shown the bottom of the box.

Click OK to close the box.

MVP-Press

Heather Perreaux 4/2/10 8:10 AM	Deleted: he t
Heather Perreaux 4/2/10 8:12 AM	Deleted: which
Ellen Lehnert 7/2/10 10:35 PM	Deleted: charts
Ellen Lehnert 7/3/10 3:30 PM	Deleted: .
Heather Perreaux 4/2/10 8:13 AM	Deleted: Usually, e
Ellen Lehnert 7/3/10 3:31 PM	Deleted: Each time a view is c
Ellen Lehnert 7/3/10 3:31 PM	Deleted: h
Heather Perreaux 4/1/10 4:15 PM	Deleted: MS Project 2010
Heather Perreaux 4/1/10 4:15 PM	Deleted: MS Project 2010
Ellen Lehnert 7/3/10 3:31 PM	Deleted: You can make a
Ellen Lehnert 7/3/10 3:32 PM	Deleted: the
Ellen Lehnert 7/3/10 3:32 PM	Deleted: Click onClick
Heather Perreaux 4/2/10 10:59 AM	Deleted: the
Heather Perreaux 4/2/10 9:01 AM	Deleted: in
Heather Perreaux 4/2/10 8:15 AM	Deleted: the
Heather Perreaux 4/2/10 8:15 AM	Deleted: achieved
Heather Perreaux 4/2/10 8:15 AM	Deleted: using
Heather Perreaux 4/2/10 9:01 AM	Deleted: form
Heather Perreaux 7/3/10 5:30 PM	Comment [17]: Timescale slider bar? or somewhere in the view?
Heather Perreaux 4/2/10 10:59 AM	Deleted: form

Timescale

Top Tier

Middle Tier

Bottom Tier

Non-working time

Middle tier formatting

Units: Weeks

Label: Jan 25, '09

Use fiscal year

Count: 1

Align: Center

Tick lines

Timescale options

Show: Two tiers (Middle, Bottom)

Size: 117 %

Scale separator

Preview

Feb 20, '11							Feb 27, '11							Mar 6, '11							Mar 13, '11						
S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F

Help

OK

Cancel

Ellen Lehnert 7/2/10 10:38 PM

Deleted: ForIf your project schedules requires using a fiscal year:, under **tTimescale options**, pick show **tThree tiers** and define the top or third tier. Adjusting the timescale using this form will work best starting at the bottom tier and working your up way througho the Middle Tier and Top Tiers at avoid errors.

Practice: Configuring Schedule/Display Options

In this practice, you will:

- <action verb> Title of Exercise 1
- <action verb> Title of Exercise 2
- <action verb> Title of Exercise 3

**Practice Slide
(Placeholder)**

The Practice page is where you write detailed instructions for completing work listed as Exercises.

Type the Exercise Title and write a brief summary what the student will be doing in the exercise. Then list your ideas what they will be doing.

SAMPLE

In this practice you will create a Project Server Authentication profile and then configure the local cache settings in Project Professional 2007.

Exercise 1: Create Project Server Authentication Profile

In this exercise you will create Project Server authentication profile to connect to the Project Web Access site.

Perform the following exercise on the PS07 virtual machine.

4. From the **Start** menu, click **All Programs → Microsoft Office → Microsoft Office Tools** and click **Microsoft Office Project Server 2007 Accounts**.
5. In the **Project Server Accounts** dialog box, click **Add**.
6. In the **Account Properties** dialog box, and complete the following settings and click **OK**.

Setting	Perform the following:
Account Name	Type Project Server
Project Server URL	Type http://epm/pwa
When connecting	Select Use Windows user account
Set as default account	Select check box

Lesson 3: Creating and Saving a Project Schedule

- Title of Topic 1
- Title of Topic 2
- Title of Topic 3
- Title of Topic 4

***Lesson Slide
(Placeholder)***

At this point we are ready to new create a project. Project schedules may be started in multiple ways. If your options have been saved for “All Projects” you may use some of the importing functions to allow tasks from SharePoint lists ([Pro 2010 only](#)) or Excel to be brought into a new schedule. [Creating projects using templates is an easy way to build project schedules faster.](#)

The topics to be discussed in this lesson are:

1. Creating a Project
2. Creating a Project from an Excel Workbook
3. Creating a Project from a SharePoint Task List
4. Importance of Naming Standards
5. Setting Read-Only and Password Attributes
6. Saving the Schedule
7. Saving and Sending Options

Heather Perreux 4/2/10 9:07 AM

Deleted: p

Ellen Lehnert 7/3/10 3:50 PM

Deleted: and

Creating a [New](#) Project

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

When [Project 2010](#) is initiated, a new blank project schedule will automatically appear.

To create a blank project schedule:

- Click **File** → **New**

[Backstage choices shown below will give you an array of choices of where to begin a new project schedule. As you click the various choices, options and additional data will appear on the right side of the view.](#)

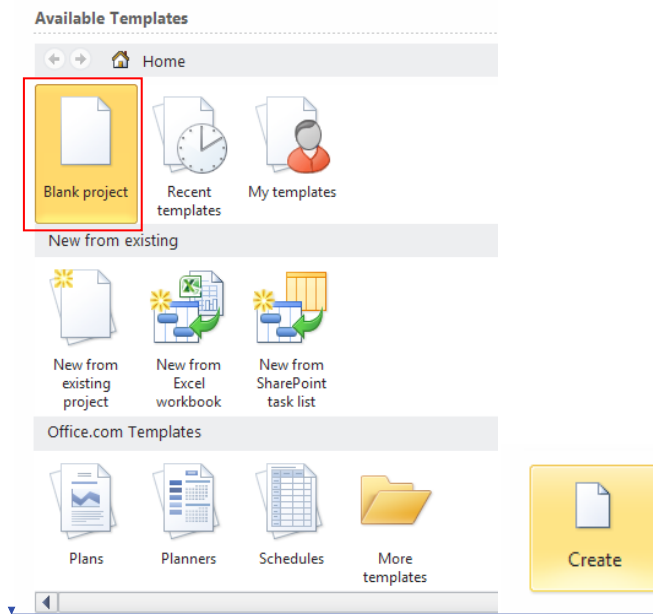
- [Double clicking **Blank project** or click **Blank project** and click **Create** will result in creating a blank project file](#)
- **Recent Templates:** [Create a project from a recently used template](#)
- **My templates:** [Template created by you and saved to your desktop](#)
- **New from an existing project:** [Use an existing project schedule to create a new project](#)
- **New project from Excel workbook:** [Columns in the Excel workbook will be mapped to fields within Project 2010. The import process is discussed in the next lesson.](#)
- **New from Sharepoint task list:** [Project 2010 Professional only. Tasks will be imported using the URL and security of the Sharepoint site.](#)
- **Office.com templates:** [Create a new project from a template that would be downloaded from Office.com on-line](#)
- [If the Quick Access Bar was customized to add the **New** button, pressing that button will create a new project schedule](#)

Heather Perreux 4/2/10 9:08 AM

Deleted: the MS Project 2010

Heather Perreux 4/1/10 6:18 PM

Deleted: on



Ellen Lehnert 7/3/10 5:02 PM

Deleted: <#> .

Ellen Lehnert 7/3/10 5:25 PM

Deleted: .

... [25]

Creating a Project from an Excel Workbook

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

A project schedule can be created using an Excel Workbook task list. Keep in mind that the fields or columns that are being imported from Excel will be mapped to fields or columns within Project 2010. Pre-planning to know which Excel fields should be mapped to which Project 2010 fields would be helpful.

NOTE: All options should be pre-set before importing tasks.

To create a project schedule from an Excel Workbook:

1. Click **File** → **New** → **New From Excel Workbook**
2. Navigate to the Excel file that contains the tasks to be imported into the schedule, click **Open**.
3. Project 2010 Import Wizard will start running – Click **Next**
4. Select whether to use a new map that will be created or an existing Project import map. For this example we will create a new map. Click the radio button next the **New Map** and click **Next**.
5. Import can start a new project file, append to the end of an existing project file or merge the data using a merge field. In this example we will create a new project schedule. Click **As a new project** and click **Next**.
6. When the data is brought into Project 2010, select if the data is to be mapped to the Task fields, Resource fields or Assignment fields. Click **Tasks**.
7. If the originating Excel file contains header or title information, click **Import includes Headers**. The system will remove this row (the first line only) as the header row. Click **Next**.
8. The Task Mapping form will be used to view some of the data and map which Excel fields will be imported into which Project 2010 fields. Pull down the values in the

Heather Perreaux 4/2/10 10:08 AM

Deleted: If you have a task list in an Excel Workbook, you may create a... project sc... [26]

Heather Perreaux 4/2/10 10:09 AM

Deleted: Locate ...o the Excel file w... [27]

Heather Perreaux 4/2/10 10:11 AM

Deleted: The MS

Heather Perreaux 4/2/10 10:10 AM

Deleted: which ...hat you ...ill be cr... [28]

Heather Perreaux 4/2/10 10:11 AM

Deleted: The i...mport can start a ne... [29]

Heather Perreaux 7/3/10 5:30 PM

Comment [18]: Incomplete thought. Is the software prompting for a response? Should be clearly stated.

Ellen Lehnert 7/3/10 5:30 PM

Comment [19]: done

Heather Perreaux 4/2/10 10:12 AM

Deleted: MS

Ellen Lehnert 7/3/10 5:05 PM

Deleted: is

Heather Perreaux 4/1/10 6:20 PM

Deleted: on...“...asks” ... [30]

Heather Perreaux 4/2/10 10:14 AM

Deleted: you are importing from ... [31]

Heather Perreaux 4/1/10 4:15 PM

Deleted: MS Project 2010

MVP-Press

Select **worksheet name** option and select the sheet name in Excel **that** contains the data to be imported. After the choice has been made, the data from the sheet will be available for viewing.

9. In the example below, the duration field from the Excel Workbook was able to be automatically mapped to the duration field in Project 2010. However, the Task Name field could not find a match. The correct field name for the task name field in Project 2010 is "Name". Click the red error message (**not mapped**) and select the field name of **Name**. Repeat for other fields to be imported. Not all fields are required during the import process which allows the user to pick and choose which ones are appropriate to the schedule. Click **Next** to continue after all columns have been mapped.

10. The next step **offers** the option to save the map for future reuse.

- To skip saving the map, click **Next**.
- To save the map, click **Save Map** and give the map a name. An option will be available to use the **Organizer** to copy the import map into the **Global.mpt** and save it for future use. The Organizer will be discussed in [Module 10](#). Click **Finish** to start the import.

11. The new **Project 2010** schedule will open with the columns imported.

Heather Perreux 4/2/10 10:15 AM
Deleted: "
Ellen Lehnert 7/3/10 5:07 PM
Deleted: s
Ellen Lehnert 7/3/10 5:07 PM
Deleted: N
Heather Perreux 4/2/10 10:15 AM
Deleted: "
Heather Perreux 4/2/10 10:16 AM
Deleted: which
Ellen Lehnert 7/3/10 5:09 PM
Deleted: <#>In the example above, the duration field from the Excel Workbook was able to be automatically mapped to the duration field in MS Project 2010. However, the Task Name field could not find a match. The correct field name for ... [32]
Heather Perreux 4/2/10 10:20 AM
Deleted: T
Ellen Lehnert 7/3/10 5:16 PM
Deleted: will
Ellen Lehnert 7/3/10 5:16 PM
Deleted: gives
Heather Perreux 4/2/10 10:19 AM
Deleted: you
Heather Perreux 4/2/10 10:20 AM
Deleted: If you feel you want t
Heather Perreux 4/2/10 10:20 AM
Deleted: "
Heather Perreux 4/2/10 10:20 AM
Deleted: "
Heather Perreux 4/2/10 10:20 AM
Deleted: If you would like t
Heather Perreux 4/2/10 10:20 AM
Deleted: on "
Ellen Lehnert 7/3/10 5:16 PM
Deleted: it
Heather Perreux 4/2/10 10:20 AM
Deleted: "
Ellen Lehnert 7/3/10 5:16 PM
Deleted: .
Heather Perreux 7/3/10 5:30 PM
Comment [20]: Add a reinforcing statemen ... [34]
Heather Perreux 4/2/10 10:21 AM
Deleted: If you chose to save the map y ... [33]
Ellen Lehnert 7/3/10 5:15 PM
Deleted: You will also have the
Ellen Lehnert 7/3/10 5:15 PM
Deleted: to go to the organizer.
Ellen Lehnert 7/3/10 5:30 PM
Comment [21]: done
Heather Perreux 4/2/10 10:22 AM
Deleted: MS

Creating a Project from a SharePoint Task List

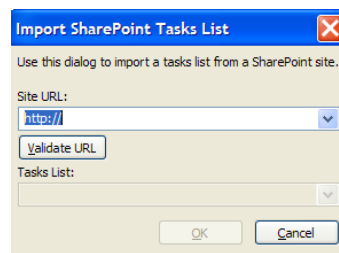
- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

Project 2010 Professional allows for creating a new project by importing a task list from a SharePoint site. The user must have appropriate permissions to access the SharePoint site and the URL path to insert into the form directing Project 2010 Pro to the location of the task list.

To import tasks from a SharePoint task list into Project 2010 Professional:

1. Click **File** → **New** → **New from SharePoint Task List**



2. Enter the **URL** in the form as shown above and click **Validate URL**. A list of all the task lists included in the SharePoint site will be displayed. Select the appropriate list and click **OK**.

The list will be imported from the SharePoint site.

NOTE: this is Pro only – Rolly should add a screen shot here.

MVP-Press

Ellen Lehnert 7/3/10 4:57 PM
Deleted: Another method of
Heather Perreaux 4/2/10 10:23 AM
Deleted: option
Ellen Lehnert 7/3/10 4:58 PM
Deleted: is to
Heather Perreaux 4/2/10 10:23 AM
Deleted: that is on
Heather Perreaux 4/2/10 10:22 AM
Deleted: p
Heather Perreaux 4/2/10 10:23 AM
Deleted: o
Heather Perreaux 4/2/10 10:23 AM
Deleted: be able to import the tasks, you
Heather Perreaux 4/2/10 10:22 AM
Deleted: p
Heather Perreaux 4/2/10 10:24 AM
Deleted: to
Heather Perreaux 4/2/10 10:23 AM
Deleted: MS
Heather Perreaux 4/2/10 10:24 AM
Deleted: where to find
Heather Perreaux 4/2/10 10:22 AM
Deleted: p
Heather Perreaux 4/2/10 10:22 AM
Deleted: MS
Heather Perreaux 4/1/10 6:20 PM
Deleted: on
Heather Perreaux 4/2/10 10:25 AM
Deleted: p
Heather Perreaux 4/2/10 10:25 AM
Deleted: . Then v
Heather Perreaux 4/2/10 10:26 AM
Deleted: the
Heather Perreaux 4/2/10 10:26 AM
Deleted: You will be given a
Heather Perreaux 4/2/10 10:26 AM
Deleted: p
Heather Perreaux 4/2/10 10:26 AM
Deleted: p
Ellen Lehnert 7/3/10 5:30 PM
Comment [22]: Rolly needs to add a screen shot here.
Ellen Lehnert 7/3/10 4:59 PM
Deleted: I don't have the ability to test this --
Ellen Lehnert 7/3/10 4:59 PM
Deleted:

Importance of Naming Standards

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

The project name is an important consideration of the project. If [given the option of naming a project](#), project managers will name the project whatever is comfortable for them. The name that is chosen is not necessarily comfortable for other users and viewers of the project schedule. [Consideration should be given around](#) how the project name will [and should](#) be used. Each organization should have a naming convention for projects.

Popular poor choices for project names:

- Projects named after chili peppers
- Projects named after cars
- Projects named after project managers or that include the project manager name
- Abbreviations that make sense only to the person naming the project
- Internal company speak
- [254](#) character project names

Popular good choices for project names:

- Project names based on what the project actually is
- 50 characters or less
- Client name, short project name, [known](#) code for new development or enhancement
- Standardized abbreviations: department name, location, short project name
- Select a name that is easily recognizable and understandable

It should be noted that project names will be seen and used in:

- Columns on reports – this will be necessary if any report will contain tasks from multiple projects.
- [Header and footers for reports](#)
- [Multiple uses in Project Server 2010](#)

Heather Perreux 4/2/10 10:27 AM

Deleted: -

Heather Perreux 4/2/10 10:28 AM

Deleted: are left up to their own choices, they

Heather Perreux 4/2/10 10:29 AM

Deleted: It should be considered

Ellen Lehnert 7/3/10 5:31 PM

Deleted: 255

Ellen Lehnert 7/3/10 5:32 PM

Deleted: <#>Project names will be seen in tThe Project Center and in reporting through the Project Web Application - ... [35]

Setting Read-Only and Password Attributes

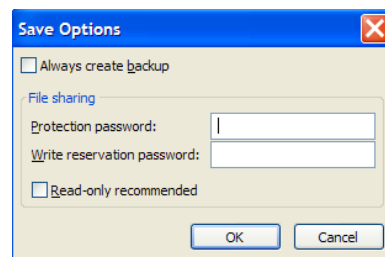
- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

Topic Slide (Placeholder)

When a project is saved, it may be necessary to set the project schedule as read-only to guard against other users changing attributes and data in the project schedule. Another security layer is the ability to assign a password and to always have a backup copy of the schedule created when the schedule is opened.

To set the read only and security passwords for a project schedule:

1. Click File → Save as → Tools (lower left of the Save As form) the following dialogue box appears:



2. Always create backup: If checked, a backup of the project schedule will be created each time the project is opened. No changes will be made to the original project schedule file.
3. Protection password: will guard against someone opening and viewing the project schedule without the password.
4. Write reservation password: guards against someone opening the project schedule in write mode. If the user has the first password only, they are allowed to open the schedule in read-only mode.
5. Read-only recommended: when checked and the file is opened the following message will appear:

Heather Perreaux 4/2/10 10:33 AM

Deleted: there

Heather Perreaux 4/2/10 10:33 AM

Deleted: might

Heather Perreaux 4/2/10 10:33 AM

Deleted: the

Heather Perreaux 4/2/10 10:33 AM

Deleted: it

Ellen Lehnert 7/3/10 5:34 PM

Deleted: a

Heather Perreaux 4/2/10 10:33 AM

Deleted: set

Heather Perreaux 4/2/10 10:33 AM

Deleted: your

Heather Perreaux 4/1/10 6:21 PM

Deleted: Click on

Heather Perreaux 4/2/10 10:32 AM

Deleted: t

Heather Perreaux 4/2/10 10:34 AM

Deleted: forms

Heather Perreaux 4/2/10 10:34 AM

Deleted: The first option will a

Ellen Lehnert 7/3/10 5:35 PM

Deleted: a

Ellen Lehnert 7/3/10 5:35 PM

Deleted: Creates

Ellen Lehnert 7/3/10 5:35 PM

Deleted: and n

Ellen Lehnert 7/3/10 5:36 PM

Deleted: actual

Heather Perreaux 4/2/10 10:35 AM

Deleted: The p

Heather Perreaux 4/2/10 10:36 AM

Deleted: will

Heather Perreaux 4/2/10 10:37 AM

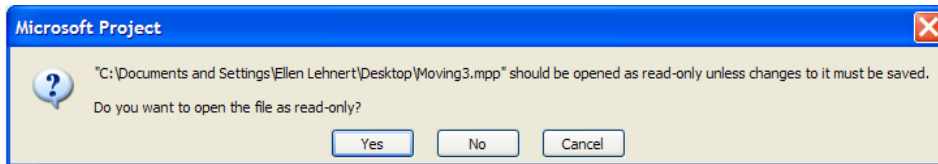
Deleted: If the last option

Heather Perreaux 4/2/10 10:37 AM

Deleted: is selected,

Ellen Lehnert 7/3/10 6:37 PM

Deleted: the



At this point the user may select to **Yes or No** to open the file **as read-only**. **Cancel** results in the file not being opened.

Heather Perreux 4/2/10 10:39 AM

Deleted:

Heather Perreux 4/2/10 10:39 AM

Deleted: (Yes) or in read-write mode (No).

Heather Perreux 4/2/10 10:39 AM

Deleted: will

Saving the Schedule

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

**Topic Slide
(Placeholder)**

Project 2010 provides multiple file formats for a project schedule. The steps to save a file are very similar to other MS Office files.

To save the Project 2010 schedule:

1. Click **File** → **Save as** → select file location
2. Enter the file name in the File Name area
3. Click **Save** to complete the save. The file will be given a Project 2010 default file extension of .mpp.

There is also an option to save the Project 2010 schedule in an alternative file format. Some of the formats are:

- MS Project 2007
- MS Project 2000-2003
- MS Project template 2010 - .mpt file extension
- MS Project template 2007 - .mpt file extension
- MS Excel
- PDF
- XPS
- XML
- CVS
- Text

Ellen Lehnert 7/3/10 6:39 PM

Deleted: Saving the project schedule is no different than saving any

Heather Perreux 4/2/10 10:40 AM

Deleted: MS

Heather Perreux 4/1/10 6:21 PM

Deleted: Click on

Heather Perreux 4/2/10 10:41 AM

Deleted: ending

Heather Perreux 4/2/10 10:41 AM

Deleted: by default and be in the MS Project 2010 format.

Heather Perreux 4/2/10 10:42 AM

Deleted: the

Heather Perreux 4/2/10 10:42 AM

Deleted: MS

Heather Perreux 4/2/10 10:42 AM

Deleted: s

Heather Perreux 4/2/10 10:42 AM

Deleted: nding

Heather Perreux 4/2/10 10:42 AM

Deleted: ending

Save and Send Options

- Slide incorporates a summary of the content of the topic
- Can be done through:
 - Graphic Representation
 - Text in bullet list format (concise)
 - Ideally a combination of both

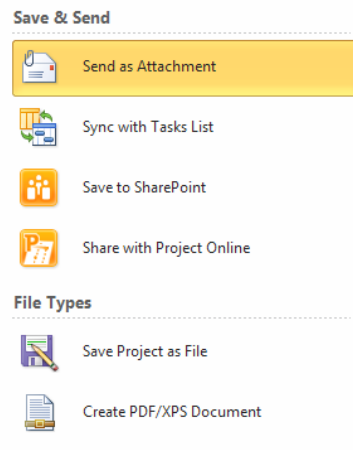
**Topic Slide
(Placeholder)**

A new feature in Project 2010 is the Save and Send from the backstage view. These options are an easy method of saving projects and sharing project schedules with others. There is also an option to send project files as an attachment to an email as well as publishing the project schedule to a SharePoint site (Project 2010 Pro users only).

To navigate to the options available for Save and Send:

- Click File → Save and Send → select one of the options offered

NOTE: the right side of the screen will change as options are selected



- **Send as Attachment:** sends the project schedule as an attachment to an Outlook email

MVP-Press

Heather Perreaux 4/2/10 10:43 AM

Deleted: ing

Heather Perreaux 4/2/10 10:43 AM

Deleted: ing

Ellen Lehnert 7/3/10 6:40 PM

Deleted: to

Heather Perreaux 4/1/10 4:15 PM

Deleted: MS Project 2010

Ellen Lehnert 7/3/10 6:41 PM

Deleted: on

Heather Perreaux 4/2/10 10:43 AM

Deleted: You will

Heather Perreaux 4/2/10 10:44 AM

Deleted: have

Heather Perreaux 4/2/10 10:44 AM

Deleted: s

Heather Perreaux 4/2/10 10:44 AM

Deleted: s

Heather Perreaux 4/2/10 10:44 AM

Deleted: s

Heather Perreaux 4/2/10 10:44 AM

Deleted: on

Heather Perreaux 4/2/10 10:44 AM

Deleted: p

Heather Perreaux 4/2/10 10:44 AM

Deleted: s

Heather Perreaux 4/2/10 10:44 AM

Deleted: get to

Heather Perreaux 4/1/10 6:21 PM

Deleted: Click on

Ellen Lehnert 7/3/10 6:42 PM

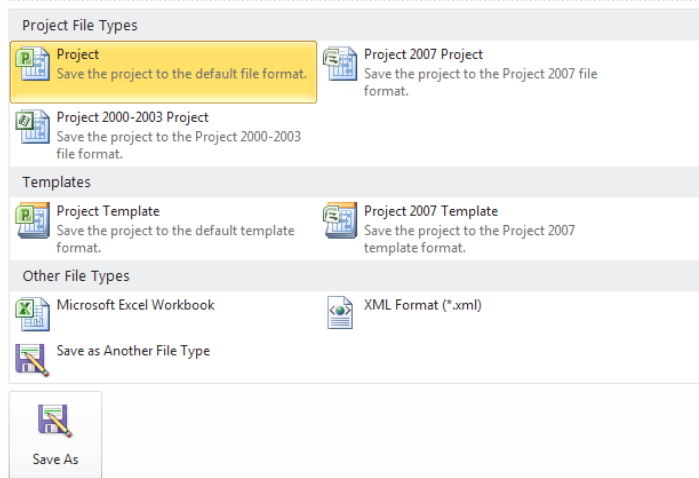
Deleted: -

Heather Perreaux 4/2/10 10:45 AM

Deleted: this will

- **Sync with Tasks List:** use this option to synchronize with a task list in SharePoint. Team members can update task status and the updates can be synchronized back to the project schedule. The URL to the SharePoint site and the task list name will be needed at the time of the synchronization.
- **Save to Sharepoint:** this option will save the project schedule to a Sharepoint site. (Project 2010 Pro users only)
- **Share with Project Online:** used with Project Server and SharePoint
- **Save Project as a file:** when clicked the right side of the view is shown below. There are several file type options available. Click **Project** and **Save As** to start the save process.

Save Project as File



- **Create a PDF/XPS document:** Click **Create PDF/XPS**, name the file and select **PDF** or **XPS**, click **OK** to complete the save.

Create a PDF/XPS Document

Save this project as a fixed format.

- Document looks the same on most computers
- Preserves fonts, formatting and images
- Content cannot be easily changed
- Free viewers are available on the Web



Heather Perreaux 4/2/10 10:46 AM

Deleted: you can

Heather Perreaux 4/2/10 10:46 AM

Deleted: p

Heather Perreaux 4/2/10 10:46 AM

Deleted: p

Ellen Lehnert 7/3/10 6:43 PM

Deleted: -

Heather Perreaux 4/2/10 10:46 AM

Deleted: this option is

Heather Perreaux 4/2/10 10:46 AM

Deleted: MS

Heather Perreaux 4/2/10 10:47 AM

Deleted: p

Ellen Lehnert 7/3/10 6:46 PM

Deleted: -

Ellen Lehnert 7/3/10 6:46 PM

Deleted: There are several file types options available. Click on Click the choice above Project and then click on the Save As icon at the bottom to start the save process. [36]

Ellen Lehnert 7/3/10 6:47 PM

Deleted: as

Heather Perreaux 4/2/10 10:49 AM

Deleted: reate

Ellen Lehnert 7/3/10 6:48 PM

Deleted: Click on Click the "Create PDF/XPS" icon, name the file and then select **PDF** or **XPS**, click **OK** to complete the save.

Practice: Creating and Saving a Project Schedule

In this practice, you will:

- <action verb> Title of Exercise 1
- <action verb> Title of Exercise 2
- <action verb> Title of Exercise 3

**Practice Slide
(Placeholder)**

The Practice page is where you write detailed instructions for completing work listed as Exercises.

Type the Exercise Title and write a brief summary what the student will be doing in the exercise. Then list your ideas what they will be doing.

SAMPLE

In this practice you will create a Project Server Authentication profile and then configure the local cache settings in Project Professional 2007.

Exercise 1: Create Project Server Authentication Profile

In this exercise you will create Project Server authentication profile to connect to the Project Web Access site.

Perform the following exercise on the PS07 virtual machine.

7. From the **Start** menu, click **All Programs** → **Microsoft Office** → **Microsoft Office Tools** and click **Microsoft Office Project Server 2007 Accounts**.
8. In the **Project Server Accounts** dialog box, click **Add**.
9. In the **Account Properties** dialog box, and complete the following settings and click **OK**.

Setting	Perform the following:
Account Name	Type Project Server
Project Server URL	Type http://epm/pwa
When connecting	Select Use Windows user account
Set as default account	Select check box

Summary

In this module, you learned how to:

<verb, past tense> Title of Lesson 1

<verb, past tense> Title of Lesson 2

<verb, past tense> Title of Lesson 3

Summary Slide
(Placeholder)

Laying the basis for how a project schedule will function is important. Understanding the options and the result of your option choices will help the schedule deliver the value you are hoping to achieve. Forthought and planning will help create the type of schedule needed for managing your project.

In this module you learned how to:

- Create project calendars and the options that work with the calendars.
- Save a customized calendar for use by other project schedules
- Scheduling terms: Effort-driven, Fixed Duration, Fixed Work and Fixed Units
- Set the scheduling options
- Create projects from templates, SharePoint lists and Excel lists
- Establish naming conventions for project schedules
- Set security passwords for project schedules

Ellen Lehnert 7/3/10 6:49 PM

Deleted:

Heather Perreaux 4/2/10 10:51 AM

Deleted: ting

Heather Perreaux 4/2/10 10:51 AM

Deleted: Creating

Heather Perreaux 4/2/10 10:50 AM

Deleted:

Heather Perreaux 4/2/10 10:50 AM

Deleted: from

Heather Perreaux 4/2/10 10:50 AM

Deleted: p

Heather Perreaux 4/2/10 10:51 AM

Deleted: , from

Heather Perreaux 4/2/10 10:51 AM

Deleted: ing

Heather Perreaux 4/2/10 10:51 AM

Deleted: ting

Heather Perreaux 4/2/10 10:51 AM

Deleted: