

## Workshop 1 – Navigation and Setting Your Project Options Background

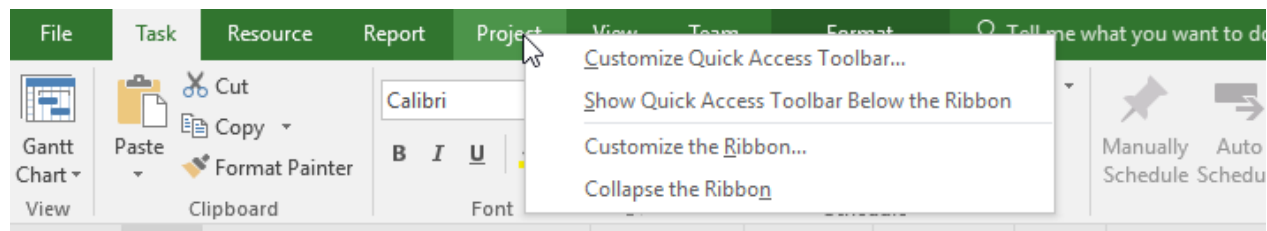
In this workshop you will practice navigating around the screen, set the options to allow durations to be entered in days, ensure that a useful date format is displayed and ensure other options are set so the software operates in a simpler mode than the standard defaults.

### Navigation practice

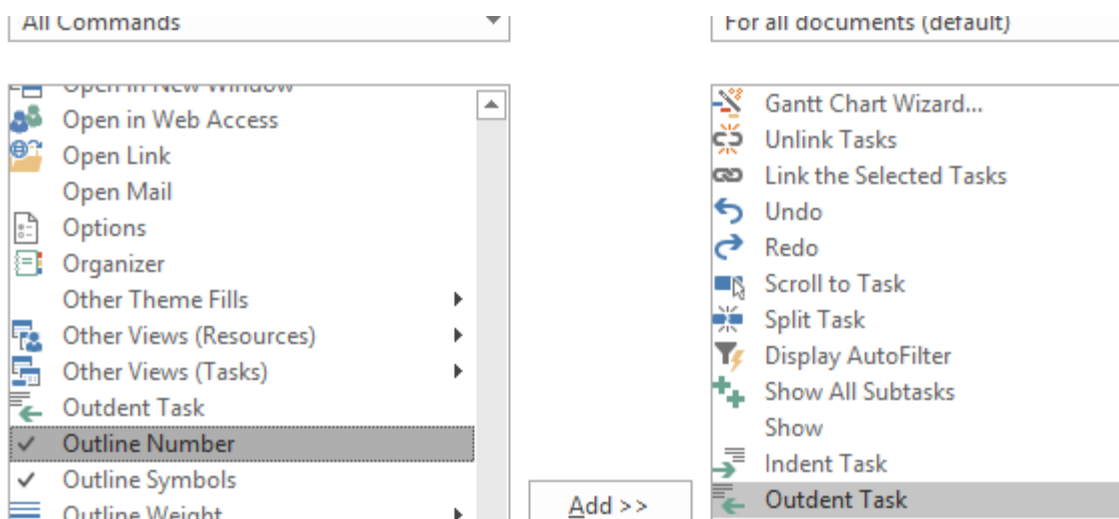
1. Click on the Ribbon Toolbar menu at the top of the screen, work your way through the tabs and observe what commands are located on each tab, the toolbars in Project 2013 and 2016 are slightly different: Microsoft Project 2016 Microsoft Project 2013



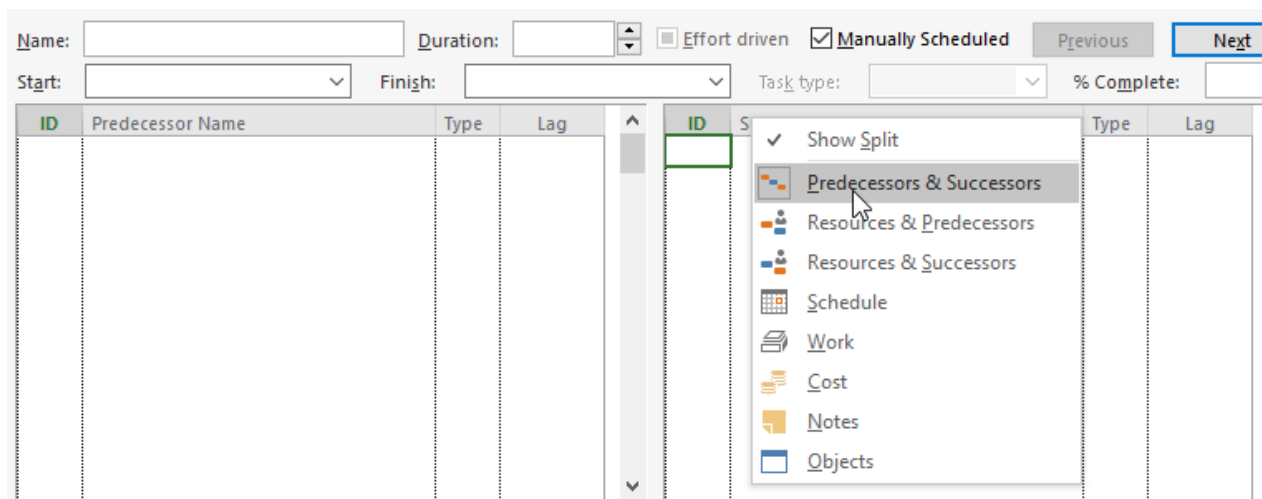
2. Right-click on the Ribbon Toolbar and display the Ribbon Toolbar Menu:



3. To allow more buttons to be displayed on the Quick Access Toolbar, click on the Show Quick Access Toolbar below the Ribbon to move the Quick Access Toolbar below the Ribbon Toolbar.
4. From the same menu, click on the Customize Quick Access Toolbar... to open the "Project Options" form. This form may also be opened by selecting File, Options. Now explore the tabs on the left-hand side of the Project Options form.
5. With the Project Options form open, click on the Quick Access Toolbar tab and add the following frequently used buttons to the Quick Access Toolbar, if they not already displayed:



6. Click on the Customize Ribbon tab in the File, Options to open the Project options form, ensure that Developer tab is checked. The Developer tab will now be displayed on the Ribbon to allow access the Organizer form more easily, and then close the form.
7. Right-click on the Ribbon Toolbar and display the Ribbon Toolbar Menu. Click on Collapse the Ribbon to hide the Ribbon Toolbar. When you click in the Gantt-Chart area the Ribbon will minimize and more work area will be available allowing you to see more tasks. This is useful when you have a small screen.
8. Right-click in the Gantt-Chart, select Show Split to split the window and this will show the Task form in the bottom window.
9. Make the bottom window active by clicking in it.
10. Note the text on the left-hand side of the screen is highlighted, when moving from the top pane to the bottom pane. The active pane has the highlighted text. This may be quite hard to see with some screen colors.
11. Right-click in the bottom pane and select the different menu options to see how the Task Details form changes with the different options. Leave this form with the Predecessors and Successors option displayed.



12. Activate the upper pane, by clicking in it.
13. Resize the panes by dragging the Split screen bar.
14. Close the Split screen by double-clicking on the horizontal dividing line.
15. Split the screen by double-clicking on the small bar in the bottom right-hand corner of the screen.

### Assignment – Set the Options

1. Close your project by selecting File, Close and do not save any changes, you should have Microsoft Project open, but no projects in view and a blank screen.
2. Select File, Options to open the Project Options form.
3. Select General tab and set the Default View to Gantt-Chart.
4. Set the Date format: to either: “ddmmmyy” i.e., 28 Jan '09, or “mmmddyy” i.e., Jan 28 '09.

NOTE: The available date format will depend on your system settings, set in the system Control Panel, Region and Language Options. If you wish to show the time in 24 hour format then there is more information in the OPTIONS chapter, para 22.1.2 Project view.

5. Enter your name and initials.
6. If you uncheck the Start-up options, Show the Start screen when this application starts then the Start Screen will not be displayed when you start Microsoft Project and you will be taken straight to the Gantt Chart View.

General options for working with Project.

**User Interface options**

ScreenTip style: Show feature descriptions in ScreenTips

**Project view**

Default view: Gantt Chart

Date format: 28 Jan '09

**Personalize your copy of Microsoft Office**

User name: Halil POSACI

Initials: hp

☐ Always use these values regardless of sign in to Office.

Office Background: Circuit

Office Theme: Colorful


**Start up options**

☐ Show the Start screen when this application starts

7. Select the Display tab and check that ALL check boxes are checked.
8. Select the Schedule tab and set the Schedule Options for your project as per the picture below:

**Schedule**

☒ Show scheduling messages ⓘ

Show assignment units as a: Decimal ▼ 

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**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 ⓘ

☐ Autolink inserted or moved tasks ⓘ

☒ Split in-progress tasks ⓘ

☒ Update Manually Scheduled tasks when editing links

☒ Tasks will always honor their constraint dates ⓘ


☒ Show that scheduled tasks have estimated durations ⓘ

☒ New scheduled tasks have estimated durations

☐ Keep task on nearest working day when changing to Automatically Scheduled mode

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**Schedule Alerts Options:** Project1 ▼

☐ Show task schedule warnings 

☐ Show task schedule suggestions

NOTE: The picture above shows the time in 24 hour format, if you wish to show the time in 12 hour format then you will need to change your system setting in Control Panel, Region and Language Options.

9. Select the Advanced tab and set options as per the diagram below:

**Planning Wizard**

☐ Advice from Planning Wizard

☒ Advice about using Project

☒ Advice about scheduling

☒ Advice about errors

**General options for this project:** Project1

☒ Automatically add new resources and tasks

Default standard rate: \$20.00/h

Default overtime rate: \$20.00/h

**Edit**

☒ Allow cell drag and drop

☐ Move selection after enter

☒ Ask to update automatic links

☒ Edit directly in cell

**Display options for this project:** Project1

Minutes: min Weeks: wk

Hours: hr Months: mon

Days: dy Years: yr

☐ Add space before label

10. Go to the Trust Center, Trust Center Settings -> Legacy-Formats and select Prompt when loading files with legacy or non-default file format. This option will allow you to open files created in earlier versions of Microsoft Project but will warn you that it is not a Microsoft Project 2010 to 2016 file format.

#### Trust Center

**Trust Center**

Trusted Publishers

Trusted Add-in Catalogs

Add-ins

**Macro Settings**

Legacy Formats

**Macro Settings**

☐ Disable all macros without notification

☒ Disable all macros with notification

☐ Disable all macros except digitally signed macros

☐ Enable all macros (not recommended; potentially dangerous)

11. Select **OK** twice to close the Project Options form.