# Knowledge Assessment Lesson 7

Fill in the Blank

*Complete the following sentences by writing the correct word or words in the blanks provided*.

1. Filtering is a quick way to view only the task or resource information you choose.
2. In the Sort dialog box, you can utilize up to three nested levels of sort criteria.
3. When you use grouping, the summary data rows are set off by a colored background.
4. When AutoFilter is turned on, small arrows are visible next to the column headings.
5. A way to reorder task or resource information in a table and to display summary values according to various criteria you can choose is called a(n) group.
6. The More Filters dialog box shows you all of the predefined filters that are available to you for tasks or resources.
7. A(n) sort is a way of ordering task or resource information in a view by the criteria you specify.
8. When you apply a filter, you may see gaps in the order of the ID numbers.
9. When you sort data in your project, the sort applies to the active view , no matter which table is displayed.
10. A tool that enables you to see or highlight in a table only the task or resource information that meets criteria you choose is a(n) filter.

Multiple Choice

*Select the best response for the following statements*.

1. Which of the following is the simplest way to reorganize data in Microsoft Project?



* 1. filtering



* 1. sorting



* 1. grouping
  2. AutoFiltering

1. The function lets you reverse actions you have performed in Microsoft Project.
   1. Task Drivers
   2. Reverse Filtering
   3. Multiple Level Undo



* 1. Ungrouping

1. Which of the following is the one instance in which the actual data of your project is changed by sorting?
   1. The Permanently renumber resources check box is selected.



* 1. The Multiple Level Undo function is disabled.
  2. The project is saved before the sorting is reversed.
  3. All of the above.

1. When you apply a group to your project schedule, the data in the summary rows cannot be changed directly because of which of the following?
   1. It will cause the grouping to become permanent.
   2. It will alter the data in your project schedule.
   3. It is derived from subordinate data.



* 1. It will cause an error in the grouping function.
  2. When AutoFilter is on, clicking on the down arrow next to the column heading does which of the following?
     1. sorts the data in descending order
     2. turns the AutoFilter off
     3. automatically adjusts the column width
     4. allows you to select criteria to apply to the filter



* 1. How many times can the Multiple Level Undo function be used?
     1. as many times as desired
     2. up to 99 times, or until the original data is restored



* + 1. up to 35 consecutive times
    2. up to 50 consecutive times
  1. If a view has a filter applied to it, the name of the filter will be displayed in the Filter box on the

ribbon.

* + 1. Data
    2. Format
    3. View



* + 1. Resource Management
  1. There is no visual indicator that a task or resource view has been sorted other than which of the following?
     1. the shaded summary rows
     2. the small *s* at the top of each data column
     3. the order in which the rows of data appear



* + 1. There is no visual indicator to show a view has been sorted.
  1. Grouping might be helpful if you are trying to see which of the following?
     1. only the tasks that contain the word *weekly*
     2. the critical path tasks
     3. the tasks ordered from highest to lowest cost
     4. the total cost of each resource group



* 1. You cannot save custom settings that you have specified for which of the following?
     1. sorting
     2. grouping
     3. filtering
     4. all of the above



# Competency Assessment Lesson 7 Project 7-1: Sorting by Multiple Criteria

You have some additional setup work that needs to be completed before the Tailspin Remote Drone project can begin. Because you will need to pay overtime (time and one‐half) for work beyond 40 hours per week, you would like to get a volunteer who has a low standard rate. Sort your resources according to Standard Rate and Max Units so that you can make your request from the least‐cost group of employees.

The ***Tailspin Remote Drone 7***‐***1*** project schedule is available on the book companion website.

**GET READY. LAUNCH** Microsoft Project if it is not already running. **OPEN *Tailspin Remote Drone 7***‐***1*** from the data files for this lesson.

1. Click the **View** ribbon. Then, in the Resource Views group, click **Resource Sheet**.
2. On the ribbon, click **Sort**, and then click **Sort by**.
3. In the Sort by section, select **Type** from the drop‐down menu. Next to that, click **Descending**.
4. In the first *Then by* section, select **Standard Rate** from the drop‐down menu. Next to that, click

**Descending**.

1. In the last *Then by* section, select **Max Units** from the drop‐down menu. Next to that, click

**Descending**. Make sure the *Permanently renumber resources* box is *not* checked.

1. Click the **Sort** button.
2. **SAVE** the project schedule as ***Remote Drone Standard Rate Sort*** and then **CLOSE** the file.

**LEAVE** Project open for the next exercise.

# Project 7-2: Applying an HR Filter

You are reviewing your project schedule for hiring a new employee. You want to specifically review the staff members from the Human Resources (HR) department who are involved with this project. You need to apply a filter that will screen out any staff except HR.

The ***Hiring New Employee 7***‐***2*** project schedule is available on the book companion website.

**GET READY. OPEN *Hiring New Employee 7***‐***2*** from the data files for this lesson.

1. Click the **View** ribbon and then click **Resource Sheet**.
2. Click the **down** arrow in the Group column heading, point to **Filters**, and then click **(Custom…)**.
3. In the Group section, select **contains** from the drop‐down list in the first box if it is not already visible. In the adjacent box, key **HR**.
4. Click **OK**.
5. **SAVE** the project schedule as ***Hiring New Employee HR Filter*** and then **CLOSE** the project schedule.

**PAUSE. LEAVE** Project open to use in the next exercise.

# Proficiency Assessment

**Project 7-3: Sorting Resource Groups by Standard Rate for Remote Drone Music Video**

You are working on employee reviews and pay increases for your staff for the upcoming year. You have decided it would be beneficial to be able to look at the standard rate variation within resource groups working on this project. You need to set up a custom group that will enable you to do this.

The ***Tailspin Remote Drone 7***‐***3*** project schedule is available on the book companion website.

**GET READY. OPEN *Tailspin Remote Drone 7***‐***3*** from the data files for this lesson.

1. Change the view to a Resource Sheet view.
2. From the ribbon, select **Group by: More Groups.**
3. Select **Resource Group** and then make a copy of this group.
4. In the Group Definition box, name the new group **Resource Groups by Standard Rate**.
5. On the *Group By* line, set up the grouping by Standard Rate in descending order.
6. Click **Define Group Intervals** and then set up this dialog box so that the grouping is done on Intervals of 5.
7. Select the group you have created and apply it to your project schedule.
8. Widen the Resource Name field so that you can see the Standard Rate groupings.
9. **SAVE** the project schedule as ***Remote Drone Resource Groupings*** and then **CLOSE** the file.

**PAUSE. LEAVE** Project open to use in the next exercise.

# Project 7-4: Performing a Duration Sort for an Office Remodel

You are responsible for the kitchen and lunchroom remodel for your office. Your manager has asked you which tasks on the project are scheduled to take the longest. You need to do a quick sort on the tasks to respond to his question.

The ***Office Remodel 7***‐***4*** project schedule is available on the book companion website.

**GET READY. OPEN *Office Remodel 7***‐***4*** from the data files for this lesson.

1. Change the view to the Gantt Chart view.
2. Change the table view to Summary.
3. From the View ribbon, select **Sort** and then select **Sort by**.
4. Set up the dialog box to sort by Duration in descending order. Make sure that the tasks are not permanently renumbered and uncheck the *Keep outline structure* check box.
5. Perform the sort.
6. **SAVE** the project schedule as ***Office Remodel Duration Sort*** and then **CLOSE** the file.

**PAUSE. LEAVE** Project open to use in the next exercise.

# Mastery Assessment

**Project 7-5: Performing a Management Filter for Tailspin Remote Drone Project**

You are the project manager for the Tailspin Remote Drone Project. You need to review all of the tasks to which Frank Zhang and Judy Lew are assigned. Frank is one of the driving force managers behind this project, and is Judy's boss. You want to make sure you have the required presentations ready on those days. You need to apply a filter to only the tasks with Frank Zhang assigned to them.

The ***Tailspin Remote Drone 7***‐***5*** project schedule is available on the book companion website.

**GET READY. OPEN *Tailspin Remote Drone 7***‐***5*** from the data files for this lesson.

1. Open the More Filters dialog box.
2. Begin to build a new filter named **Senior Management Task Filter**.
3. Build the first level of the filter based on Resource Name, which contains **Frank Zhang**.
4. Using **And** to link the levels, add a second level of the filter based on Resource Names, which contains **Judy Lew**.
5. Run the filter.
6. **SAVE** the project schedule as ***Remote Drone Management Filter*** and then **CLOSE** the file.

**PAUSE. LEAVE** Project open to use in the next exercise.

# Project 7-6: Comparing Costs and Durations for Hiring a New Employee

You want to compare the cost of tasks that have the same duration in your project schedule to hire a new employee. You need to set up a custom group in order to group the data by duration and then by cost.

The ***Hiring New Employee 7***‐***6*** project schedule is available on the book companion website.

**GET READY. OPEN *Hiring New Employee 7***‐***6*** from the data files for this lesson.

1. Switch to the Task Usage view.
2. Use the Duration to set up a new custom group called Duration‐Cost.
3. Set up the new group so that it groups by descending Duration and then descending Cost.
4. Apply the Duration‐Cost group.
5. **SAVE** the project schedule as ***Hiring Duration Cost Group*** and then **CLOSE** the file.

**CLOSE** Project.