PLANNING AND SCHEDULING

USING

MICROSOFT® OFFICE PROJECT 2007

BY

PAUL EASTWOOD HARRIS
SUMMARY
The book was written so it may be used as:

- A training manual for a two-day training course, or
- A self-teach book, or

The screen shots for the book are mainly taken from Microsoft Office Project Standard 2007 but the book may be used to learn Microsoft Office Project Professional 2007.

The book has been written to be used as the basis for a two-day training course and includes exercises for the students to complete at the end of each chapter. Unlike many training course publications, the course book may then be used by the students as a reference book.

This publication is ideal for people who would like to quickly gain an understanding of how the software operates and explains how the software differs from Primavera P3 and SureTrak, thus making it ideal for people who wish to convert from these products.

CUSTOMIZATION FOR TRAINING COURSES
Training organizations or companies that wish to conduct their own training may have the book tailored to suit their requirements. This may be achieved by removing, reordering or adding content to the book and by writing their own exercises. This book is available in both A4 spiral bound, which lies flat on the desk for training and/or self-teaching, and in B5 paperback as a reference manual. Please contact the author to discuss this service.

AUTHOR’S COMMENT
As a professional project planner and scheduler I have used a number of planning and scheduling software packages for the management of a range of project types and sizes.

The first books I published were user guides/training manuals for Primavera SureTrak and P3 users. These were well received by professional project managers and schedulers, so I decided to turn my attention to Microsoft Project 2000, 2002, 2003 and now Microsoft Office Project 2007. This book follows the same proven layout of my previous books. I trust this book will assist you in understanding how to use Microsoft Project on your projects. Please contact me if you have any comments on this book.

ABOUT THE COVER PAGES
Top right  A power station in the Latrobe Valley, Victoria, Australia
Left  Ruins of Port Arthur convict prison, Tasmania, Australia.
Center right  Reece Dam, Tasmania, Australia spillway in flood. The author was the site engineer for the construction of this spillway.
Bottom right  Petronas Twin Towers Skybridge, Kuala Lumpur, Malaysia
CURRENT BOOKS PUBLISHED BY EASTWOOD HARRIS

Planning Using Primavera® Project Planner P3® Version 3.1 Revised 2006
ISBN 1-921059-13-3 Spiral Bound
First Published March 2000

Planning Using Primavera® SureTrak Project Manager Version 3.0 Revised 2006
ISBN 1-921059-14-1 A4 Spiral Bound
First Published June 2000

Project Planning and Scheduling Using Primavera® Contractor Version 4.1
For the Construction Industry
First Published January 05

PRINCE2™ Planning and Control Using Microsoft® Project
ISBN 1 921059 06 0 B5 Paperback     ISBN 1-921059-06-0 A4 Spiral Bound
First Published May 2005
Revised for Version 2007 planned for early 2007

Planning and Control Using Microsoft® Project and PMBOK® Guide Third Edition
First Published June 2005
Revised for Version 2007 planned for early 2007

Planning and Scheduling Using Primavera® Version 5.0 For Engineering & Construction
First Published December 05

Planning and Scheduling Using Primavera® Version 5.0 For IT Project Office
First Published December 05

SUPERSEDED BOOKS BY THE AUTHOR
Planning and Scheduling Using Microsoft® Project 2000
Planning and Scheduling Using Microsoft® Project 2002
Planning and Scheduling Using Microsoft® Project 2003
Project Planning and Scheduling Using Primavera Enterprise - Team Play Version 3.5
Project Planning and Scheduling Using Primavera Enterprise - P3e & P3e/c Version 3.5
Project Planning and Scheduling Using Primavera® Version 4.1 for IT Project
Project Planning and Scheduling Using Primavera® Version 4.1 or E&C
Planning Using Primavera Project Planner P3 Version 2.0
Planning Using Primavera Project Planner P3 Version 3.0
Planning Using Primavera Project Planner P3 Version 3.1
Project Planning Using SureTrak for Windows Version 2.0
Planning Using Primavera SureTrak Project Manager Version 3.0
# INTRODUCTION

1.1 Purpose

1.2 Required Background Knowledge

1.3 Purpose of Planning

1.4 Project Planning Metrics

1.5 Planning Cycle

1.6 Levels of Planning

1.7 Monitoring and Controlling a Project

# CREATING A PROJECT PLAN

2.1 Understanding Planning and Scheduling Software

2.2 Understanding Your Project

2.3 Level 1 – Planning without Resources

2.3.1 Creating Projects

2.3.2 Defining Calendars

2.3.3 Defining the Project WBS Using Outlining

2.3.4 Defining, Adding and Organizing Activities

2.3.5 Adding the Logic Links

2.3.6 Constraints

2.3.7 Risk Analysis

2.3.8 Contingent Time

2.3.9 Scheduling the Project

2.3.10 Formatting the Display – Filters and Layouts

2.3.11 Printing and Reports

2.3.12 Issuing the Plan

2.4 Level 2 – Tracking Progress without Resources

2.4.1 Setting the Baseline Schedule

2.4.2 Tracking Progress

2.4.3 Corrective Action

2.5 Level 3 – Planning with Resources

2.5.1 Estimating or Planning for Control

2.5.2 The Balance Between the Number of Activities and Resources

2.5.3 Creating and Using Resources

2.5.4 Resource Calendars, Activity Types and Driving Resources

2.5.5 Resource Graphs and Usage Tables

2.5.6 Resource Leveling

2.6 Level 4 – Tracking Progress of a Resourced Schedule

2.6.1 Statusing Projects with Resources
6 ADDING TASKS 6-1
6.1 Adding New Tasks 6-2
6.2 Reordering Tasks by Dragging 6-3
6.3 Copying and Pasting Tasks 6-3
6.4 Copying Tasks from Other Programs 6-4
6.5 Dynamically Linking Cells to Other Programs 6-4
6.6 Task Information Form 6-5
6.7 Indicators Column 6-5
6.8 Elapsed Durations 6-6
6.9 Milestones 6-6
6.10 Assigning Calendars to Tasks 6-7
   6.10.1 Assigning a Calendar Using the Task Information Form 6-7
   6.10.2 Assigning a Calendar Using a Column 6-7
7 ORGANIZING TASKS USING OUTLINING 7-1
7.1 Creating an Outline 7-1
7.2 Promoting and Demoting Tasks 7-2
7.3 Summary Task Duration Calculation 7-3
7.4 Summarizing Tasks 7-3
   7.4.1 To Roll Up Summary Tasks and Show Tasks 7-3
   7.4.2 Roll Up All Tasks to an Outline Level 7-4
   7.4.3 Show All Tasks 7-4
7.5 Project Summary Task 7-4
8 FORMATTING THE DISPLAY 8-1
8.1 Formatting the Columns 8-2
   8.1.1 Formatting Columns Using the Table Function 8-2
   8.1.2 Formatting Time Units 8-3
   8.1.3 Formatting Columns Using the Column Definition Form 8-4
   8.1.4 Deleting and Inserting Columns 8-4
   8.1.5 Adjusting the Width of Columns 8-4
   8.1.6 Moving Columns 8-4
8.2 Formatting the Bars 8-5
   8.2.1 Formatting Bars Using the Gantt Chart Wizard 8-5
   8.2.2 Formatting All Task Bars Using the Bar Styles Form 8-5
   8.2.3 Format One or More Specific Task Bars 8-7
   8.2.4 Layout Form – Format Bars Options 8-8
8.3 Row Height 8-10
8.4 Format Fonts 8-10
   8.4.1 Format Font Command 8-10
   8.4.2 Format Text Style 8-11
8.5 Format Colors 8-11
8.6 Format Timescale 8-12
  8.6.1 Format Timescale Command 8-12
  8.6.2 View Zoom 8-13
  8.6.3 Format Timescale Font 8-13
8.7 Format Gridlines 8-14
8.8 Format Links, Dependencies, Relationships, or Logic Lines 8-15
9 ADDING TASK DEPENDENCIES 9-1
  9.1 Understanding Dependencies 9-3
  9.2 Understanding Lags and Leads 9-4
  9.3 Restrictions on Summary Task Dependencies 9-5
  9.4 Displaying the Dependencies on the Gantt Chart 9-5
    9.4.1 Graphically Adding a Dependency 9-6
    9.4.2 Using the Link and Unlink Icon on the Standard Toolbar 9-6
    9.4.3 Linking Using the Menu Command 9-6
    9.4.4 Adding and Deleting Predecessors with the Task Information Form 9-7
    9.4.5 Predecessor and Successor Details Forms 9-8
    9.4.6 Editing or Deleting Dependencies Using the Task Dependency Form 9-8
    9.4.7 Autolink New Inserted Tasks or Moved Tasks 9-9
    9.4.8 Editing Relationships Using the Predecessor or Successor Columns 9-9
    9.4.9 Unique ID Predecessor or Unique ID Successor Columns 9-9
    9.4.10 Editing Relationships Using WBS Predecessor or Successor Columns 9-9
  9.5 Scheduling the Project 9-10
  9.6 Task Drivers 9-11
10 NETWORK DIAGRAM VIEW 10-1
  10.1 Understanding the Network Diagram View 10-2
  10.2 Adding and Deleting Tasks in the Network Diagramming View 10-2
  10.3 Adding, Editing and Deleting Dependencies 10-3
  10.4 Formatting the Task Boxes 10-3
  10.5 Formatting Individual Boxes 10-4
  10.6 Formatting the Display and Relationship Lines 10-4
  10.7 Early Date, Late Date and Float/Slack Calculations 10-6
11 CONSTRAINTS 11-1
  11.1 Assigning Constraints 11-3
    11.1.1 Open the Task Information Form 11-3
    11.1.2 Displaying the Constraint Type and Constraint Date Column 11-3
    11.1.3 Typing a Date into the Task Information or Details Form 11-4
    11.1.4 Display a Combination View through the Task Details Form 11-4
  11.2 Deadline Date 11-4
  11.3 Schedule From Project Finish Date 11-5
  11.4 Task Notes 11-6
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>FILTERS</td>
<td>12.1 Understanding Filters 12-1, 12.2 Applying an Existing Filter 12-2, 12.3 Creating and Modifying Filters 12-4, 12.4 Defining Filter Criteria 12-5</td>
</tr>
<tr>
<td>12.4.1</td>
<td>Simple Filters, Operator and Wild Cards 12-5</td>
<td></td>
</tr>
<tr>
<td>12.4.2</td>
<td>And/Or Filters 12-7</td>
<td></td>
</tr>
<tr>
<td>12.4.3</td>
<td>Multiple And/Or 12-8</td>
<td></td>
</tr>
<tr>
<td>12.4.4</td>
<td>Interactive Filter 12-8</td>
<td></td>
</tr>
<tr>
<td>12.5</td>
<td>AutoFilters 12-9</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>VIEWS, TABLES AND DETAILS</td>
<td>13.1 Understanding Views 13-2, 13.2 Applying a View 13-3, 13.3 Creating a New View 13-4</td>
</tr>
<tr>
<td>13.3.1</td>
<td>Creating a New Single View 13-4</td>
<td></td>
</tr>
<tr>
<td>13.3.2</td>
<td>Creating a Combination View 13-5</td>
<td></td>
</tr>
<tr>
<td>13.3.3</td>
<td>Copying and Editing a View 13-6</td>
<td></td>
</tr>
<tr>
<td>13.3.4</td>
<td>Copying a View to and from Another Project 13-6</td>
<td></td>
</tr>
<tr>
<td>13.4</td>
<td>Tables 13-7</td>
<td></td>
</tr>
<tr>
<td>13.4.1</td>
<td>Applying a Table to a View 13-7</td>
<td></td>
</tr>
<tr>
<td>13.4.2</td>
<td>Creating and Editing a Table 13-8</td>
<td></td>
</tr>
<tr>
<td>13.5</td>
<td>Details Form 13-9</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>PRINTING AND REPORTS</td>
<td>14.1 Printing 14-1, 14.2 Print Preview 14-2, 14.3 Page Set-up 14-3</td>
</tr>
<tr>
<td>14.3.1</td>
<td>Page Tab 14-4</td>
<td></td>
</tr>
<tr>
<td>14.3.2</td>
<td>Margins Tab 14-5</td>
<td></td>
</tr>
<tr>
<td>14.3.3</td>
<td>Header and Footer Tabs 14-6</td>
<td></td>
</tr>
<tr>
<td>14.3.4</td>
<td>Legend Tab 14-7</td>
<td></td>
</tr>
<tr>
<td>14.3.5</td>
<td>View Tab 14-8</td>
<td></td>
</tr>
<tr>
<td>14.4</td>
<td>Print Form and Manual Page Breaks 14-9</td>
<td></td>
</tr>
<tr>
<td>14.5</td>
<td>Reports 14-10</td>
<td></td>
</tr>
<tr>
<td>14.5.1</td>
<td>Visual Reports 14-10</td>
<td></td>
</tr>
<tr>
<td>14.5.2</td>
<td>Reports 14-11</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
<td>Page</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
<td>------</td>
</tr>
<tr>
<td>15.1</td>
<td>Setting the Baseline</td>
<td>15-2</td>
</tr>
<tr>
<td>15.1.1</td>
<td>Setting Baseline Dates</td>
<td>15-2</td>
</tr>
<tr>
<td>15.1.2</td>
<td>Setting an Interim Baseline</td>
<td>15-3</td>
</tr>
<tr>
<td>15.1.3</td>
<td>Clearing and Resetting the Baseline</td>
<td>15-3</td>
</tr>
<tr>
<td>15.1.4</td>
<td>Resetting the Baseline Using “Roll Up Baselines”</td>
<td>15-4</td>
</tr>
<tr>
<td>15.1.5</td>
<td>Displaying the Baseline Data</td>
<td>15-7</td>
</tr>
<tr>
<td>15.2</td>
<td>Practical Methods of Recording Progress</td>
<td>15-8</td>
</tr>
<tr>
<td>15.3</td>
<td>Understanding Tracking Progress Concepts</td>
<td>15-10</td>
</tr>
<tr>
<td>15.3.1</td>
<td>Task Lifecycle</td>
<td>15-10</td>
</tr>
<tr>
<td>15.3.2</td>
<td>Actual Start Date Assignment of an In-Progress Task</td>
<td>15-10</td>
</tr>
<tr>
<td>15.3.3</td>
<td>Calculation of Actual &amp; Remaining Durations of an In-Progress Task</td>
<td>15-10</td>
</tr>
<tr>
<td>15.3.4</td>
<td>Calculating the Early Finish Date of an In-Progress Task</td>
<td>15-11</td>
</tr>
<tr>
<td>15.3.5</td>
<td>Summary Bars Progress Calculation</td>
<td>15-13</td>
</tr>
<tr>
<td>15.3.6</td>
<td>Understanding the Current Date, Status Date &amp; Update Project Date</td>
<td>15-13</td>
</tr>
<tr>
<td>15.4</td>
<td>Updating the Schedule</td>
<td>15-14</td>
</tr>
<tr>
<td>15.4.1</td>
<td>Using Update Project</td>
<td>15-15</td>
</tr>
<tr>
<td>15.4.2</td>
<td>Update Tasks</td>
<td>15-16</td>
</tr>
<tr>
<td>15.4.3</td>
<td>Updating Tasks Using the Task Information Form</td>
<td>15-16</td>
</tr>
<tr>
<td>15.4.4</td>
<td>Updating Tasks Using the Task Details Form</td>
<td>15-17</td>
</tr>
<tr>
<td>15.4.5</td>
<td>Updating Tasks Using Columns</td>
<td>15-18</td>
</tr>
<tr>
<td>15.4.6</td>
<td>Marking Up Summary Tasks</td>
<td>15-18</td>
</tr>
<tr>
<td>15.4.7</td>
<td>Reschedule Uncompleted Work To Start After</td>
<td>15-19</td>
</tr>
<tr>
<td>15.4.8</td>
<td>Status Date Calculation Options - New Tasks</td>
<td>15-21</td>
</tr>
<tr>
<td>15.4.9</td>
<td>Status Date Calculation Options - When Statusing a Schedule</td>
<td>15-23</td>
</tr>
<tr>
<td>15.4.10</td>
<td>Tracking Toolbar</td>
<td>15-23</td>
</tr>
<tr>
<td>15.5</td>
<td>Simple Procedure for Statusing a Schedule</td>
<td>15-24</td>
</tr>
<tr>
<td>15.6</td>
<td>Comparing Progress with Baseline</td>
<td>15-24</td>
</tr>
<tr>
<td>15.7</td>
<td>Corrective Action</td>
<td>15-25</td>
</tr>
<tr>
<td>15.8</td>
<td>In-progress Schedule Check List</td>
<td>15-26</td>
</tr>
<tr>
<td>16.1</td>
<td>Understanding a Project Breakdown Structure</td>
<td>16-1</td>
</tr>
<tr>
<td>16.2</td>
<td>Customize Fields</td>
<td>16-2</td>
</tr>
<tr>
<td>16.3</td>
<td>Grouping</td>
<td>16-4</td>
</tr>
<tr>
<td>16.3.1</td>
<td>Customize Group</td>
<td>16-5</td>
</tr>
<tr>
<td>16.3.2</td>
<td>Using a Predefined Group</td>
<td>16-6</td>
</tr>
<tr>
<td>16.3.3</td>
<td>Creating a New Group</td>
<td>16-6</td>
</tr>
<tr>
<td>16.3.4</td>
<td>Grouping Resources in the Resource Sheet</td>
<td>16-7</td>
</tr>
</tbody>
</table>
16.4 Custom Outline Codes 16-8
  16.4.1 Define a Custom Outline Code Structure, Microsoft Project 2007 16-8
  16.4.2 Define a Custom Outline Code Structure, 2000 – 2003 16-10
  16.4.3 Assigning Custom Codes to Tasks 16-11
  16.4.4 Organize Tasks Under a Custom Outline Code Structure 16-12

16.5 Outline Codes 16-12

16.6 User Defined WBS Function 16-13

17 OPTIONS 17-1

  17.1 Options 17-1
  17.2 View 17-2
  17.3 General 17-4
  17.4 Edit 17-5
  17.5 Calendar 17-6
  17.6 Schedule 17-8
  17.7 Calculation 17-11
  17.8 Spelling 17-14
  17.9 Security 17-14
  17.10 Save 17-15
  17.11 Interface 17-16
    17.11.1 Graphical Indicators 17-16
    17.11.2 Project Guide 17-16

18 CREATING RESOURCES 18-1

  18.1 Creating Resources in the Resource Sheet 18-2
  18.2 Grouping Resources in the Resource Sheet 18-3
  18.3 Resources Information Form 18-4
    18.3.1 General 18-4
    18.3.2 Editing and Using Resource Calendars 18-4
    18.3.3 Costs 18-6
    18.3.4 Notes 18-6
    18.3.5 Custom Fields 18-6

19 ASSIGNING RESOURCES AND COSTS TO TASKS 19-1

  19.1 Task Type and Effort-Driven 19-2
    19.1.1 Task Type – Fixed Duration, Fixed Units, Fixed Work 19-2
    19.1.2 Effort-Driven 19-2
  19.2 Fixed Costs 19-3
  19.3 Assigning Resources using the Resource Assignment Form 19-4
  19.4 Assigning Resources Using the Task Details Form 19-5
  19.5 Assigning Task Information Form 19-6
19.6 Assignment of Resources to Summary Tasks 19-6
19.7 Sharing Resources with Other Projects 19-6
19.8 Rollup of Costs and Hours to Summary Tasks 19-7
19.9 Contour the Resource Assignment 19-8

20 RESOURCE HISTOGRAMS, TABLES, S-CURVES & LEVELING 20-1
20.1 Resource Graph Form 20-1
20.2 Resource Graph View 20-2
20.3 Resource Tables View 20-3
20.4 Detailed Styles Form 20-3
20.5 Printing Resource Profiles and Tables 20-4
20.6 Exporting Table Data to Create S-Curves and Histograms in Excel 20-4
  20.6.1 Export Using Analysis Toolbar 20-4
  20.6.2 Export Using Copy and Paste 20-4
  20.6.3 S-Curve Example 20-5
20.7 Resolving Resource Overloading 20-7
  20.7.1 Methods of Resource Leveling 20-7
  20.7.2 Other Methods of Resolving Resource Peaks and Conflicts 20-7
  20.7.3 Resource Leveling Function 20-8

21 STATUSING PROJECTS WITH RESOURCES 21-1
21.1 Understanding Baseline Dates, Duration, Costs and Hours 21-2
21.2 Understanding the Data Date 21-3
21.3 Formatting the Current Date and Status Date Lines 21-4
21.4 Information Required to Update a Resourced Schedule 21-5
21.5 Updating Dates and Percentage Complete 21-6
21.6 Entering a % Complete Against Summary Tasks 21-6
21.7 Updating Resources
  21.7.1 Updating Tasks with Fixed Costs Only 21-7
  21.7.2 Forecasting Resource Hours 21-8
  21.7.3 Forecasting Resource Hours and Costs Form 21-9
  21.7.4 Using the Task Usage and Resource Usage Views 21-10
21.8 Splitting Tasks 21-11
21.9 Summary Task Interim Baseline Calculation 21-12
21.10 Summary Tasks and Earned Value 21-14
22  TOOLS AND TECHNIQUES FOR SCHEDULING 22-1
22.1  Understanding Menu Options 22-1
22.2  Cut, Copy and Paste Row 22-1
22.3  Cut, Copy and Paste Cell 22-1
22.4  Copy Picture 22-2
22.5  Fill 22-2
22.6  Clear 22-3
22.7  Find and Replace 22-3
22.8  Go To 22-3
22.9  Insert Recurring Task 22-3
22.10 Splitting a Task 22-4
22.11 Copy or Cut-and-Paste to and from Spreadsheets 22-4
22.12 Paste Link – Cell Values in Columns 22-5
22.13 Unique Task, Resource and Assignment ID 22-5
   22.13.1 Task Unique ID 22-5
   22.13.2 Resource Unique ID 22-5
   22.13.3 Resource Assignment Unique ID 22-5
22.14 Organizer 22-6

23  WHAT IS NEW IN MICROSOFT PROJECT 23-1
23.1  WHAT IS NEW IN MICROSOFT OFFICE PROJECT 2007 23-1
   23.1.1 New File Format 23-1
   23.1.2 Notes on Calendar Exceptions and Repeating Nonwork Periods 23-1
   23.1.3 Multiple Undo 23-1
   23.1.4 3-D Bars 23-1
   23.1.5 Format Fonts 23-2
   23.1.6 Highlighted Changed Fields 23-2
   23.1.7 Schedule Currency 23-3
   23.1.8 Cost Resource 23-3
   23.1.9 General 23-3
   23.1.10 Reports Menu and New Reports 23-3
   23.1.11 Task Drivers 23-4
   23.1.12 Resource Graph Form 23-5
   23.1.13 Security 23-5
23.2  WHAT WAS NEW IN MICROSOFT PROJECT 2003 STANDARD 23-6
   23.2.1 Copy Picture to Office Wizard 23-6
   23.2.2 Print a View as a Report 23-6
   23.2.3 Options 23-6
8 FORMATTING THE DISPLAY

This chapter covers the following topics, which are used to format the on-screen display and which are also reflected in print preview and printouts:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Menu Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Table – formatting the columns of data</td>
<td><strong>View</strong>, <strong>Table:</strong> Entry, <strong>More Tables…</strong>, or Select a column and right-click to insert, or Right-click on a column header and edit.</td>
</tr>
<tr>
<td>• Formatting Columns</td>
<td>Double-click on the column title.</td>
</tr>
<tr>
<td>• Inserting Columns</td>
<td>Highlight a column and strike the <strong>Ins Key</strong>, or Select <strong>Insert, Column…</strong>, or Right-click and select <strong>Insert Column…</strong>.</td>
</tr>
<tr>
<td>• Deleting Columns</td>
<td>Highlight a column and strike the <strong>Delete</strong> key, or Select <strong>Edit, Hide Column</strong>, or Right-click and select <strong>Hide Column</strong>.</td>
</tr>
<tr>
<td>• Format Bars</td>
<td><strong>Format, Bar Styles…</strong> or double-click on a bar. <strong>Format, Gantt Chart Wizard…</strong> <strong>Format, Bar…</strong></td>
</tr>
<tr>
<td>• Row Height</td>
<td>Drag with the mouse, or <strong>Edit the Table</strong>.</td>
</tr>
<tr>
<td>• Format Text Font</td>
<td><strong>Format, Font…</strong> to format columns and <strong>Format, Text Styles…</strong> to format all other fonts.</td>
</tr>
<tr>
<td>• Timescale</td>
<td><strong>Format, Timescale…</strong>, or Double-click on the timescale.</td>
</tr>
<tr>
<td>• Gridlines</td>
<td><strong>Format, Gridlines…</strong>.</td>
</tr>
<tr>
<td>• Relationship Lines</td>
<td><strong>Format, Layout…</strong>.</td>
</tr>
</tbody>
</table>

The formatting is applied to the current **View** and is automatically saved as part of the View when another View is selected. Views are covered in more detail in the **VIEWS, TABLE AND DETAILS** chapter.

Some formatting functions, such as dragging columns to a different location, are not available in earlier versions of Microsoft Project.
8.1 Formatting the Columns

There are two methods of formatting the columns:

- Using **Table Definition** form, this is where you set up the data columns in the way you want to see the information on the screen and in printouts. You may edit, create and delete **Tables** and select which one is used to display the data.

- Inserting, editing and deleting columns of data using the **Column Definition** form.

8.1.1 Formatting Columns Using the Table Function

- Select **View, Table: Entry** and select from the list of predefined **Tables** the table you want to display:

  ![Table: Entry](image1)

- Select **View, Table: More Tables…** to open the **More Tables** form:

  ![More Tables](image2)

  - To create a new Table.
  - To edit the highlighted Table.
  - To copy the highlighted Table.
  - Opens the **Organizer** form which enables you to copy a Table from one opened project to another or to the Global Project.
  - Applies the selected Table making it visible on the screen.
When you select New..., Edit... or Copy... you will be presented with the Table Definition form:

- Click on the Show in menu box to display the Table in the View, Table: menu.
- The columns of data will be displayed on screen from left to right in the same order as the rows in the form.
- Highlight a row and then you may use the Insert Row, Copy Row, or Delete Row buttons.
- The data to be displayed may be selected from the drop-down box in the Field Name column.
- Align Data and Width are used for formatting the data in the columns.
- The Microsoft Project Field Name may be replaced by typing your own title in the Title box.
- The Date format: drop-down box is used to change the format for this table only.
  - This is a very useful function to ensure that other users of the project file see the intended date format and not their system default date format.

- Row Height: sets the default height of all the rows in this table. A row height may be changed by dragging the cell boundary line once a task has been created.
- Lock first column prevents the first column from scrolling and is useful when the first column contains the Task Name.
- OK takes you back to the More Tables form where you may click on the Apply button to commit the new or edited Table.

To save a table for use in all your new projects, copy the table to the Global.mpt template using Tools, Organizer... and select the Tables tab.

You may also copy a Table to another project or rename a Table using Tools, Organizer... and selecting the Tables tab.

### 8.1.2 Formatting Time Units

Select Tools, Options..., Edit and:

- The View Options for time units in “Project” always specifies the time units, for example day, dy or d.
- Check on the Add space before label check box to add a space between the value and label in date columns.
- Unchecking Add space before label and selecting d allows a narrower duration column.
8.1.3 Formatting Columns Using the Column Definition Form

When you use this function, you are editing the Table currently in use and your changes are permanent. Double-click on a column description to open the Column Definition form where you may edit the selected column in a similar way to the Table Definition form.

The IME Mode button, if displayed, allows the customization of the Input Mode Editor for some fields. This feature will only be displayed if it is installed with the Eastern Asian operating systems.

8.1.4 Deleting and Inserting Columns

Insert a column by clicking on the column title where you require the new column. This will highlight the column. To insert a new column:

- Select Insert, Column…, or
- Hit the Ins Key, or
- Right-click and select Insert Column….

Delete a column by highlighting the column or by clicking on the title. Then:

- Select Edit, Hide Column, or
- Hit the Delete key, or
- Right-click and select Hide Column.

1. There will be no confirmation of deleting a column, but you are allowed to undo the deletion.
2. The term “hide” means “delete” and the column is removed from the Table in this project.

8.1.5 Adjusting the Width of Columns

You may adjust the width of the column either manually or automatically. For manual adjustment, move the mouse pointer to the nearest vertical line of the column. A icon will then appear and enable the column to be adjusted. For automatic adjustment, once again position the mouse pointer to the nearest vertical line of the column, and double right-click the mouse. The column width will automatically adjust to the best fit.

8.1.6 Moving Columns

Columns in a Table may be moved by clicking on the column header. The mouse pointer will change to a and the column may be dragged to a new location.
8.2 Formatting the Bars

The bars in the Gantt Chart may be formatted to suit your requirements for display. Microsoft Project has the option to:

- Format all the Task Bars by using:
  - The Bar Styles form, or
  - The Gantt Chart Wizard, which is by far the easiest way to format bars, or
- Format one or more specific Task Bars using the Format Bar form.

8.2.1 Formatting Bars Using the Gantt Chart Wizard

There is a Gantt Chart Wizard available by clicking on the icon or selecting Format, Gantt Chart Wizard. This wizard will overwrite any formatting you may have created. This is a straightforward method of formatting your bars and often this is the best method of formatting bars. It is very simple to use but will not display the Negative Float and Free Float bars. These will have to be added manually using the Bar Style form as described next.

8.2.2 Formatting All Task Bars Using the Bar Styles Form

To format all the bars you must open the Bar Style form by selecting:

- Format, Bar Styles, or
- Double-click anywhere in the Gantt Chart area, but not on an existing bar, as this will open the Format Bar form for formatting an individual bar.

The following notes are the main points for using this function. Detailed information is available in the Help facility by searching for “Bar styles dialog box.”

- Each bar listed in the table will be displayed on the bar chart.
- Bars may be deleted with the button, pasted using button and new bars inserted using the button.
- The Name is the title you may assign to the bar and is displayed in the printout legend. To hide the bar on the legend precede the Name with an *.
- The appearance of each bar is edited in the lower half of the form. The bar’s start point, middle and end points may have their color, shape, pattern, etc. formatted.
• **Show For … Tasks** allows you to select which tasks are displayed. More than one task type may be displayed by separating each type with a “,”. Bar types not required are prefixed with “Not.” For example, the [Normal,Rolled Up,Split,Not Summary] bar would not display a bar for a summary task. Should you leave this cell blank then all task types will be displayed in this format.

• The bars may be placed on one of four rows numbered from 1 to 4, top to bottom. If multiple bars are placed on the same row, the bar at the top of the list will be drawn first and the ones lower down the list will be drawn over the top.

• **From** and **To** allow you to establish where the bars start and finish. The picture below shows how to format **Total Float, Free Float** and **Negative Float**. Unlike other planning and scheduling software, the Negative Float is drawn from the Start Date of a task and not the Finish Date and therefore a separate bar is required for Negative and Positive Float.

• The **Text** tab allows you to place text inside or around the bar:

• It is not possible to format the font in this **Bar Styles** form. Select **Format, Text Styles…** to format the bar text font.

To show Critical and Non-critical tasks the bars should be formatted as shown below, with particular attention paid to the **Show For … Tasks** column. Non-critical Tasks are formatted as **Normal, Non-critical** and Critical Tasks as **Normal, Critical.**
8.2.3 Format One or More Specific Task Bars

One or more individual bars may be formatted to make them look different from other bars.

To format one or more bars:

- **Select:**
  - One task bar by clicking on it, or
  - Multiple bars by Ctrl-clicking each bar or left-clicking and dragging with the mouse, then
- **Open the Format Bar form by:**
  - Selecting **Format, Bar…**, or
  - Moving the mouse over a bar in the bar chart until the mouse changes to a and double-clicking. When more than one bar has been selected you will need to hold the **Ctrl Key** down when double-clicking on a bar.
- **Then select the required bar formatting options from the Format Bar form:**

  ![Format Bar Form](image)

  - The **Reset** is used to restore the default bar formatting to selected bars.

  The bar shape may be formatted and text information added in the same way as formatting all the bars described earlier in this chapter.

- **Select** **Format, Text styles**… to format the text font.
- **A Tasks Bar may be hidden by checking the** **Hide task bar** **option in the** **Task Information** form.
8.2.4 Layout Form – Format Bars Options

Select **Format, Layout…** to open the **Layout** form. This form has some additional bar formatting options for users to customize the appearance of the Gantt Chart.

- **Date format**: sets the format for dates displayed on bars only. Dates are displayed on bars using **Format, Bar…** or **Format, Bar Styles**.

- **Bar height**: sets the height of all the bars. Individual bars may be assigned different heights by selecting a bar shape in the styles form.

- **Always roll up Gantt bars** and **Hide rollup bars when summary expanded** works as follows:
  - Tasks before roll up:

  ![Diagram of tasks before roll up]

  - With **Always roll up Gantt bars** checked and **Hide rollup bars when summary expanded** unchecked:

  ![Diagram of tasks with Always roll up Gantt bars checked and Hide rollup bars when summary expanded unchecked]

  - With **Always roll up Gantt bars** and **Hide rollup bars when summary expanded** checked:

  ![Diagram of tasks with Always roll up Gantt bars and Hide rollup bars when summary expanded checked]

  - An individual bar may be rolled up to a summary task using the **Roll up Gantt bar to summary** option in the **Task Information** form when **Always roll up Gantt bars** options are unchecked.
• **Round bars to whole days:**
  - When this option is unchecked, the length of the task will be shown in proportion to the total number of hours worked per day over the 24-hour time span. For example, an 8-hour working duration bar is shown below:

<table>
<thead>
<tr>
<th>Duration</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

  - When this option is checked, the task bar will be displayed and spanned over the whole day irrespective of working time:

<table>
<thead>
<tr>
<th>Duration</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• **Splitting Tasks**
  - An un-started task may be split using the Split Task icon on the Task Bar, then highlighting the bar to be split and dragging the section of the bar with the mouse to the location where it is planned to conduct the work. The picture below shows Task 10 – Draft Technical Details Schedule – being split. Splits may be removed by dragging the bar back together again.

  ![Split Task Icon](image)

  - In-progress tasks may be split manually by dragging the incomplete portion to the right or a split may be created automatically by commencing a task before its predecessor is complete. Splitting in-progress tasks is covered in both the **TRACKING PROGRESS** and **OPTIONS** chapters. The two pictures below are of the same task, first with the option checked and then unchecked:

  ![Split Task Example](image)

• **Show bars splits**
  - When checked, the activity bar will display splits:

  ![Activity Bar with Splits](image)

  - When unchecked, the activity bar will **not** display splits:

  ![Activity Bar without Splits](image)

• **Bar Split Dates.** The start and finish dates of splits is not available through the user interface, only the start and finish of the task is available.
8.3 Row Height
Row heights may be adjusted to display text that would otherwise be truncated by a narrow column.

The row height may be set in the **Table Definition** form by selecting **View, Table, More Tables**.... From this view select the table you wish to edit the row height in and click on the 

![Edit button](image)

button. Once the **Table Definition** form is open select the row height from the drop-down box next to **Row height**:

The row height of one or more columns may also be adjusted in a similar way to adjusting row heights in Excel, by clicking on the row and dragging with the mouse:

- Highlight one or more rows that need adjusting by dragging or Ctrl-clicking. If all the rows are to be adjusted, then click on the **Select All** button above row number 1, to highlight all the tasks.

- Then move the mouse pointer to the left-hand side of a horizontal row divider line. The pointer will change to a double-headed arrow. Click and hold with the left mouse button and drag the row or rows to the required height.

8.4 Format Fonts

8.4.1 Format Font Command
The **Format, Font**... function allows you to format any selected text in rows or columns:

- Select all the rows by clicking on the **Select All** button, this is the box above row number 1, or

- Select one or more rows, columns or cells by Ctrl-clicking or dragging, then

- Select **Format, Font**... to open the **Font** form:

- Select the **Font**, **Font style**, font **Size**, **Color** of the text, **Background Color** and **Background Pattern** from the **Font** dialog box.

- The selected font style and type will be applied to the data column or task row in any table.

This function has been enhanced with Microsoft Project 2007 and now allows a **Background Color** and **Background Pattern** that was not available in earlier versions.
8.4.2 Format Text Style

The Format, Text Styles... command opens the Text Styles form and allows you to select a text type from the Item to Change: drop-down box and apply formatting to the selected text style. Microsoft Project 2007 added the Background Color and Background Pattern option:

Text may formatted by using any of the styles listed below:

- **All**: This is all text including columns and rows,
- **Non-critical, Critical, Milestone, Summary, Project Summary, Marked, Highlighted and External tasks**,
- **Row and Column titles**,
- **Top, Middle and Bottom Timescale Tiers**, and
- **Bar Text** left, right, below, above and inside.

8.5 Format Colors

Colors are formatted in a number of forms and there is no single form for formatting all colors:

- **Nonworking time** colors in the Gantt Chart are formatted in the Timescale form, double-click on the timescale.
- **Text** colors are formatted in the Text Styles and Font forms, found under the Format command.
- **Gridline** colors are formatted in the Gridlines form, also found under the Format command.
- **Hyperlink** colors are formatted under Tools, Options..., Edit.
- **Timescale** colors are formatted with the system color scheme used in the Start, Settings, Control Panel, Display option.
- The **Logic Lines**, also known as Dependencies, Relationships, or Links, inherit their color from the predecessor’s bar color in the Gantt Chart view and may be formatted in the Network Diagram view by selecting Format, Layout....
8.6 Format Timescale

8.6.1 Format Timescale Command
The Timescale form provides a number of options for timescale display, which is located above the Bar Chart, and the shading of Nonworking time. This function was enhanced with the release of Microsoft Project 2002; earlier versions had a Major and Minor scale only.

To open the Timescale form:
• Double-click on the timescale, or
• Select Format, Timescale….

![Timescale Form](image)

There are many options here, which are intuitive and will not be described in detail.

Top Tier, Middle Tier and Bottom Tier Tab
• These three timescales may have different scales. These are often set at “weeks and days” or “months and weeks.” By default, the Top Tier timescale has been disabled. You may enable the three tiers together by selecting Three Tiers (Top, Middle, Bottom) from the Timescale options, Show:.

• The Label will affect how much space the timescale will occupy, so the selection of a long label will result in longer Task bars.

• Tick lines and Scale separator hide and display the lines between the text.

• Size: controls the horizontal scale of the timescale and in association with the Label: are the two main tools for scaling the horizontal axis in the Gantt Chart.

• Choose the Use fiscal year function to display the financial year and then select the Tools, Options…, Calendar tab to choose the month in which the fiscal year starts.

• Should you wish to number the time periods, for example, Week 1, Week 2, etc., there are a number of sequential numbering options available at the bottom of the label list.
Nonworking Time Tab
The Nonworking time tab allows you to format how the nonworking time is displayed. You may select only one calendar. The nonworking time may be presented as shading behind the bars, in front of the bars or hidden.

8.6.2 View Zoom
The View, Zoom... function, or clicking on the and icons, is used to adjust the horizontal scale of the Gantt Chart only. It does not work like most other Windows products, which scale the whole work area.

The View, Zoom... function is not a temporary change and overwrites any customized timescale settings.

8.6.3 Format Timescale Font
To format the Timescale font, select Format, Text styles... to open the Text Styles form:

The timescale fonts may be formatted separately by selecting the appropriate line item under Item to Change:

A very tight timescale may be achieved by making the Bottom Timescale Tier a small font as displayed in the picture.
8.7 Format Gridlines

Gridlines are important to help divide the visual presentation of the Bar Chart. This example shows Middle Tier Gridlines every week and Bottom Tier Gridlines every day.

To format the Grid Line select Format, Gridlines... to open the Gridlines form:

- Select the gridline from the drop-down box under Line to change.
- Select color and type from under Normal.
- Date gridlines may be set to occur at intervals using the At interval option.

Some of the titles for the gridlines are not intuitive, so some interpretation is given below:
- For Data Column and Row dividing lines, use Sheet Rows and Sheet Columns.
- For Timescale and Column Titles, use Title Horizontal and Title Vertical.
- Gantt Chart area, including lines for Project Start and Finish Date, Current and Status Date, are clearly described.
- Page Breaks will only display manually-inserted breaks. A page will only break if the Manual page breaks check box in the Print form is checked.

Microsoft Project has two dates that may be used to identify the Status Date or Data Date, which is the date that the data has been collected for statusing a project schedule. These two dates are set in the Project Information form:
- By default Microsoft Project displays the Current Date as a gray dotted vertical line but this is reset to the computer’s system date each time the project file is opened. It is suggested that this line be removed.
- The Status Date never changes once set and therefore it is suggested that this line should be displayed as per the picture above.

Many laser printers will not print light gray lines clearly, so it is often better to use dark gray or black Sight Lines for better output.
8.8 **Format Links, Dependencies, Relationships, or Logic Lines**

The Links, also known as Dependencies, Relationships, or Logic Lines, may be displayed or hidden by using the **Layout** form.

- Select **Format, Layout...** to open the **Layout** form and click on one of the three radio buttons under **Links** to select the style you require:

  ![Layout Form](image)

  - The color of the Link is inherited from the color of the predecessor task.
  - To display critical path on the relationship lines you will need to format the bars with a different color. This is often set to red.

    ![Information Icon](image)

    The color of the successors’ relationship lines is adopted from the task bar color. Therefore, re-formatting critical bars with the **Format Bar** form will also re-format the color of the successors’ relationship lines and they will no longer display the Critical Path color on the Logic Lines. This will effectively mask the critical path and could provide misleading results.

    **Note:** Primavera products format the relationship separately from the bars and are able to identify the Critical, Driving and Non-Driving relationships, which is not possible with Microsoft Project.
WORKSHOP 6

Formatting the Bar Chart

Background
Management has received your draft report and requests some changes to the presentation.

Assignment
Format your schedule as follows:

1. Create a new Table titled Review by copying the Entry table. Select View, Table, More Tables…,
2. Add Task Calendar column between Duration and Start columns in the Table Definition form. Left Align this column,
3. Align Data for the Task Calendar on the left,
4. Check the Show in menu option.
5. Apply the Table.
6. To make the Duration Column narrower, select the Tools, Options, Edit tab. Under the View options select to display Days as “d” and uncheck Add space before label.
7. Double-click on the Duration column and rename the Title “Dur” and click Best Fit to produce a narrow column.

Continued Over….
WORKSHOP 6 CONTINUED

8. Double-click on the timescale and format the Middle Tier Timescale (Major scale in MSP2000) with **Units**: of **Months** with **Label**: of **Jan ‘02** and the Bottom Tier Timescale (Minor scale in MSP2000) with **Units**: of **Weeks** with **Label**: of **28,4,…** and **Size**: of **150%**.

9. Select **Format, Gridlines…** and format the Gridlines with Middle Tier Columns (Major Columns in MSP2000) to solid black lines and Bottom Tier Columns (Minor Columns in MSP2000) to dotted black lines.

10. Double-click in the bar chart area to open the **Bar Styles** form and remove the date from the milestones. If you do not have dates by your milestones then add the dates to the right of the Milestones and then remove them.

11. From the **Bar Styles** form remove the **Resource** and add the task **Name** to the right of each **Task** bar. You will notice there is no name against the milestones, these have to be added separately against the Milestone line in the **Bar Styles** form.

12. Save your **OzBuild Bid** project.

13. Check your result with the example shown below.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Dur</th>
<th>Task Calendar</th>
<th>Start</th>
<th>Finish</th>
<th>% Complete</th>
<th>% Complete</th>
<th>% Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>OzBuild Bid</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>11 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>10 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bid Request Documents Received</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>1 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bid Strategy</td>
<td>1d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>1 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical Feasibility Study</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>10 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimate</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>11 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation Requirements</td>
<td>4d</td>
<td>6 Day Working</td>
<td>1 Dec ‘08</td>
<td>4 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Component Bids</td>
<td>3d</td>
<td>None</td>
<td>1 Dec ‘08</td>
<td>3 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Schedule</td>
<td>4d</td>
<td>6 Day Working</td>
<td>1 Dec ‘08</td>
<td>4 Dec ‘08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical Specification</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>11 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Component Bids Costs</td>
<td>2d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>2 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal</td>
<td>2d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>9 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draft Bid Document</td>
<td>3d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>3 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed Draft Bid Document</td>
<td>1d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>1 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Validation</td>
<td>1d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>1 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revised Bid Document</td>
<td>1d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>1 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Component Packages Negotiated</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>8 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bid Document Final</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>1 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bid Submitted</td>
<td>0d</td>
<td>None</td>
<td>1 Dec ‘09</td>
<td>1 Dec ‘09</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
12 FILTERS
This chapter covers the use of Filters to select which activities are displayed on the screen and in printouts.

12.1 Understanding Filters
Microsoft Project has an ability to display tasks that meet specific criteria. You may want to see only the incomplete tasks, or the work scheduled for the next couple of months, or the tasks that are in-progress, assigned a specific resource, responsibility, phase, discipline, system or belong to a physical area of a project.

Microsoft Project defaults to displaying all tasks. It has a number of predefined filters available that you may use or edit and you may also create one or more of your own.

A filter may be applied to display or to highlight tasks that meet a criteria and affect both the activities displayed on screen and in printouts.

There are Task filters that apply to Task views and Resource filters that apply to Resource views. Both types are created and applied in the same way.

There are two types of filters:
• The first is where you select a Filter which exists or has been created using the Filters form.
• The second is to create an AutoFilter which is very similar to the Excel AutoFilter (Drop-down filter) function.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Menu Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply a Filter</td>
<td>Select Project, Filter for: All Tasks, or With the Formatting toolbar displayed, select the filter from the Filter drop-down list.</td>
</tr>
<tr>
<td>Create or modify a Filter</td>
<td>Select Project, Filter for: All Tasks, More Filters... to open the More Filters... form.</td>
</tr>
<tr>
<td>Turn on AutoFilter</td>
<td>Select Project, Filter for: All tasks, AutoFilter, or Click on the AutoFilter icon on the Formatting toolbar.</td>
</tr>
<tr>
<td>Apply an AutoFilter</td>
<td>Click on the ☑ icon in the column headers.</td>
</tr>
</tbody>
</table>

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12.2 Applying an Existing Filter

Filters may be applied using several methods:

**Method 1**
Select **Project, Filter for: All Tasks**, and select the filter required from the menu.

Only filters with the **Show in menu** check box checked in the **Filter Definition** form are displayed in the **Filtered for:** menu. The currently applied filter is always displayed after **Filtered for:** in the menu. See the picture above where the currently applied filter is the **Task Name Contains** filter.

This may not be a complete list of filters, as this list displays only filters selected to be displayed in the menu when they were created.

**Method 2**
Display the **Formatting** toolbar, and select the filter you require from the drop-down list:

Select **View, Toolbars, Formatting** to display the formatting toolbar.

This may not be a complete list of filters, as this list displays only filters chosen to be displayed from the **Filter Definition** form in the menu when they were created or edited.
Method 3
Select **Project, Filter for: All Tasks, More Filters…** to open the **More Filters…** form:

- The two radio buttons at the top of the form allow you to select filters that operate either on a **Task** criteria or on a **Resource** criteria.
  - **Task** criteria will operate on the criteria of most data such as dates, durations, text columns, number columns, outline and WBS.
  - **Resource** criteria will operate on a similar criteria as Tasks but will select the resource value and not the task value.
- Select the required filter from the drop-down list, and
- Select either:
  - ![Highlight](image) to highlight the tasks that meet the criteria, or
  - ![Apply](image) to display only the tasks that meet the criteria.
12.3 Creating and Modifying Filters

Select Project, Filter for: All Tasks, More Filters… to open the More Filters form where you may create or modify a filter:

- Click on Organizer… to copy a filter to and from another open project.
- Click on:
  - New… to create a new filter, or
  - Edit… to edit an existing filter, or
  - Copy… to copy an existing filter.
- The Filter Definition form will be displayed. The one-line example below will only display critical tasks.

- The filter may be edited in the Filter Definition form to display or highlight the required tasks.
- Checking the Show in menu box will place the filter in the menu.
- Checking Show related summary rows will display any associated Summary Tasks.
- Select OK to return to the More Filters form.

It is useful to place a space at the start of the filter name when creating a new filter as this will place the filter at the top of the list, as per the Task Name Contains filter in the picture at the top of this page.
12.4 Defining Filter Criteria

The filter criteria is determined by four columns of information in the Filter Definition form:

- **And/Or** functions when you have two or more lines of data in the Filter Definition form to operate on.

- **Field Name** defines the data field you want to operate on.

- **Test** sets the criteria such as “Greater Than” or “Less Than” or “Equals.”

- **Value(s)** is/are a date, number, Yes/No or text for the Test field to operate on. If more than one value is to be considered, for example when a Test is “Between,” the two values are separated by a comma “,”. The example below is a filter that will only display detail activities that will start between 1 Dec 08 and 30 Dec 08.

![Filter Definition in 'Workshop 08.mpp'
](image)

This chapter will not cover all the aspects of filter definitions but will cover the major principles, so you may experiment when you require a filter.

There are a number of predefined filters with a standard Microsoft Project installation. You should inspect these to gain an understanding of how filters are constructed and applied.

12.4.1 Simple Filters, Operator and Wild Cards

A simple Filter contains one line of data and therefore the And/Or function is not used. These are the most common filters and meet most common filtering requirements.

These filters are used for purposes such as displaying tasks which:

- Are not started, complete, or in-progress tasks.
- Have a Start or Finish before or after a particular date.
- Contain specific text.
- Are within a range of dates.
There are some operands you should be aware of:

- Some fields may have “Yes” or “No” entered in the Value(s). The task fields that may be filtered using a “Yes” or “No” include:
  - Summary, is the task a Summary or Detail task,
  - Critical, is the task identified as critical when the Total Slack is less than or equal to the value entered in the Calculation tab or the Options form,
  - Milestones,
  - Effort-Driven, and
  - Any other field that may be displayed in columns with a “Yes” or “No” option.

The filter below will select all tasks that are not Milestones:

- The Wildcard functions are similar to the DOS Wildcard functions and are mainly used for filtering text:
  - You may replace a single character with a “?”. Thus, a filter searching for a word containing “b?t” will display words like “bat”, “bit” and “but.”
  - You may replace a group of characters with an *. Thus, a filter searching for a word containing “b*t” will display words like “blot”, “blight” and “but.”

NOTE: For the Wildcard function to operate the equals Test must be used. This function does not work with other operands and in this mode works as a contains operand.

- NA allows the selection of a blank value. The filter below displays tasks without either a Baseline Start or Baseline Finish date:
• A **Calculated Filter** compares one value with another. The **Value(s)** field is selected from the drop-down box. The example below will display those tasks that are scheduled to start later than the Baseline start:

12.4.2 **And/Or Filters**

The **And/Or** function allows a search for tasks which meet more than one criteria by using the **And/Or** option:

• The filter below displays tasks with Slack less than 5 days **And** contain the word “Bid”:

• The filter below is similar to the one above but displays tasks with Slack less than 5 days **Or** contain the word “Bid”, It displays many more tasks:
12.4.3 Multiple And/Or

Multiple And/Or statements are possible by placing a line with only an And/Or statement. The filter below selects tasks that have a Baseline Finish and are scheduled to finish late or are not completing their work quick enough, shown as the Budgeted Cost of Work Performed (Earned Value) is less than the Budgeted Cost of Work Scheduled (Planned Value):

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Field Name</th>
<th>Test</th>
<th>Value(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Baseline Finish</td>
<td>does not equal</td>
<td>NA</td>
</tr>
<tr>
<td>Or</td>
<td>Finish</td>
<td>is greater than</td>
<td>[Baseline Finish]</td>
</tr>
<tr>
<td></td>
<td>BCW5</td>
<td>is greater than</td>
<td>[BCWP]</td>
</tr>
</tbody>
</table>

12.4.4 Interactive Filter

These filters allow you to enter the Value(s) of the filtered field after applying the filter. The filter is tailored each time it is applied via a user-prompt. The filter below will ask you to enter a word in the task name.

For this function to operate properly, the text in the Value(s) field must commence with a double quote “ and end with a double quote and question mark ”?

After the filter is applied, you will be presented with the Interactive Filter form to enter the required text:
12.5 **AutoFilters**

Microsoft Project **AutoFilters** are similar to the Excel **AutoFilter** function and allow you to select the filter criteria from drop-down menus in the column headers.

To create an **AutoFilter** based on one parameter:

- Use one of the following methods to turn on the **AutoFilter** function:
  - *Project, Filter for: All tasks, AutoFilter*, or
  - Click on the **AutoFilter** icon located on the **Formatting** toolbar.
- The column headers will display the icon in the column header. Click on this icon in one of the columns to display a drop-down box:

  ![AutoFilter icon](image)

  - Select the required criteria from the drop-down box. The period in the drop-down boxes refer to the Current Date, not the Status Date.

You may now select another column and create a filter based on a second parameter to further reduce the number of tasks displayed.

To create a **Custom AutoFilter**, which is based on two parameters:

- Click on the icon in the column headers.
- Select the (Custom…) option to open the **Custom AutoFilter** form:

  ![Custom AutoFilter](image)

  - Select the parameters you want to operate on from the four drop-down boxes and check the **And** or **Or** radio button.
  - To save a drop-down filter as a normal filter, click on the **Save** button, which opens the **Filter Definition** form.

**AutoFilters** always select the associated Summary tasks of any selected detailed tasks.
26 INDEX

% Complete, 15-13, 15-18, 17-11
  Summary Task Calculation, 15-13
% Work, 17-11, 21-1, 21-8
AC, 21-14
Accrue At, 18-3
Active Pane, 4-5
Actual
  Cost of Work Performed, 21-14
  Costs and Quantities, 21-3
  Duration Summary Task, 15-13
  Finish, 15-13
  Start, 15-13
  Work, 17-11, 19-5
ACWP, 21-14
Add New Resources Automatically, 17-4
Add Progress Line, 15-23
Additional Project Information, 3-7
ADM, 2-6
Always roll up Gantt bars, 8-8
Analysis Toolbar, 20-4, 24-1
Analyze PERT toolbar, 24-1
And/Or in Filters, 12-5
Applying
  Tables, 13-7
  Views, 13-3
Arrow Diagramming, 2-6
As Late As Possible, 3-4, 20-5
As Late As Possible Constraint, 11-2
As Of Date, 15-1
As Soon As Possible Constraint, 11-2
asc File Type, 3-2
Assigning
  Calendars to Tasks, 6-7
  Constraints, 11-3
  Resources, 19-1
Assignment
  Information Form, 19-1, 19-8
Auto Save, 17-15
AutoCorrect Options, 24-1
AutoFilter, 12-1, 12-9
Autolink, 9-9, 17-9
Automatic Calculation, 9-10, 17-11
Automatic Links Update, 17-5
BAC, 21-14
Background Color, 8-10, 8-11, 23-2
Background Pattern, 8-10, 8-11, 23-2
Bars
  Baseline, 15-24
  Format Individual, 8-7
  Format Style, 8-5
  Height, 8-8
  Hide, 8-7
  Negative Float, 8-6
  Positive Float, 8-6
  Total Float, 8-6
Base Calendar, 5-1, 18-3
Baseline, 1-4, 17-13
  Clearing, 15-3
  Costs, 21-1, 21-2
  Dates, 15-1, 21-1, 21-2
  Displaying, 15-7
  Duration, 21-2
  Finish, 15-2
  Resetting, 15-3
  Start, 15-2
  Summary Task Interim Calculation, 15-4, 21-12
  Work, 21-1, 21-2
BCWP, 21-14
BCWS, 21-14
Borders, 14-5
Bottom Tier, 8-12
Box Layout, 10-5
Budget, 21-1
  At Completion, 21-14
  Cost of Work Performed, 21-14
  Cost of Work Scheduled, 21-14
  Quantity, 21-2
C/SCSC, 21-14
Calculated Filters, 12-6
Calculation
  Automatic, 9-10, 17-11
  Manual, 9-10, 17-11
  Options, 17-11
Calendar
  Copy, 5-12
  Delete, 5-12
  Renaming, 5-12
  Resource, 18-4
  Screen, 25-2, 25-4
  Shifts, 5-8
  Summary Task, 7-3
  Tab, 5-1
  Task, 6-7
  View, 13-1
CBS, 16-1
Cell
  Copy, 22-1
  Cut, 22-1
  Paste, 22-1
Change Highlighting, 6-2
Change Working Time (Resource) form, 18-4
Clear Command, 22-3
Clear leveling values before leveling, 20-8
Clearing Baseline, 15-3
Closed Network, 2-7, 9-2, 20-5
Colors Format, 8-11
Column
  Delete, 8-4
  Format, 8-4
  Insert, 8-4
  Lock First, 13-8
  Moving, 8-4
  Width, 8-4
Combination View, 13-2, 25-1
Constraint
  As Late As Possible, 11-2
  As Soon As Possible, 11-2
  Assign, 11-3
  Finish Constraint, 11-1
  Finish No Earlier, 11-2
  Finish No Later, 11-2
  Must Finish On, 11-2
  Must Start On, 11-2
  Start No Earlier Than, 11-1, 11-2
  Start No Later Than, 11-2
  Tasks will honor their constraint dates, 17-10
Contingent Time, 2-7
Contract Breakdown Structure, 16-1
Copy
  Calendar, 5-12
  Cell, 22-1
  Picture, 22-2
  Row, 22-1
  Tables, 8-3
  Tasks, 6-3
  To and From Spreadsheets, 22-4
  Views, 13-6
Cost per Use, 18-3
Cost Rate - Resource, 18-6
Cost Variance, 21-14
Cost/Schedule Control Systems Criteria, 21-14
Create
  Combination View, 13-5
  Filter, 12-4
  Outline, 7-1
  Single View, 13-4
  Table, 13-8
  Task, 6-1
  Criteria - Filters, 12-5
  Critical Path, 2-8, 9-2, 9-10, 10-6
  CS, 21-14
  Currency, 17-3
  Current Date, 3-4, 8-14, 15-1, 15-13, 21-1, 21-3
  Current Date Gridline Formatting, 21-4
  Custom Fields, 6-5, 18-6
  Custom Outline Codes, 16-8
  Customize, 15-9
  Fields, 15-3
  Group, 16-1, 16-5
  Toolbar, 4-2
  Customize Fields Form, 16-1, 16-2
Cut
  Cell, 22-1
  Row, 22-1
  Cut and Paste to and from Spread Sheets, 22-4
  CV, 21-14
  Data Date, 2-9, 15-1, 21-3
Date
  Deadline, 11-4
  Default Format in Tables, 13-8
  Format, 8-8, 17-2
  Format, 4-3
  On Bars, 8-8
  Days Per Month, 17-7
  Deadline Date, 11-4
Default
  End Time, 17-6
  Start Time, 17-6
  Task, 17-9
  Times, 17-6
  View, 17-2
Define Group Interval form, 16-6
Delete
  Bars, 8-5
  Calendar, 5-12
  Column, 8-4
  Entire task, 22-3
  Table, 8-2
  Task Logic, 9-1
  Tasks, 10-1
  Template, 3-7
  Demoting Tasks, 7-2
Form
- Change Working Time, 5-8
- Change Working Time (Resource), 18-4
- Column Definition, 8-4
- Customize Fields, 16-1, 16-2
- Define Group Interval, 16-6
- Detailed Styles, 20-3
- Filter Definition, 12-2
- Format Bar, 8-5, 8-7, 8-15
- Group Definition, 16-6
- Layout, 8-8, 8-15
- Level Now, 20-8
- More Filters, 12-4
- More Groups, 16-6
- More Views, 13-1
- Print, 14-9
- Project Statistics, 15-23
- Reports, 14-11
- Resource Graph, 20-1, 23-5
- Resource Information, 18-4, 18-5
- Resource Usage, 19-8
- Tables, 13-8
- Task Dependency, 9-8
- Task Details, 11-4
- Task Information, 6-5, 9-7, 19-6
- Text Styles, 8-11
- Timescale, 8-12
- Update Project, 15-19
- View Definition, 13-6

Format
- Bar Style, 8-5
- Baseline Bar, 15-24
- Colors, 8-11
- Column, 8-4
- Column Width, 8-4
- Columns, 8-2
- Current Date, 21-4
- Date, 4-3
- Dependencies, 8-15
- Drawing, 24-1
- Gantt Chart Wizard, 15-24
- Gridlines, 8-14
- Hyperlink Color, 17-5
- Individual Bars, 8-7
- Individual Boxes, 10-4
- Links, 8-15
- Logic, 8-15
- Nonworking Time, 8-13
- Relationship Lines, 8-15
- Resource Graph, 20-2
- Row Height, 8-10
- Sight Lines, 21-4
- Status Date, 21-4
- Task Boxes, 10-3
- Text, 8-11
- Timescale, 8-12
- Timescale Font, 8-13
- Free Float, 2-8
- FTC, 21-14
- Group Definition, 16-6
- Layout, 8-8, 8-15
- Level Now, 20-8
- More Filters, 12-4
- More Groups, 16-6
- More Views, 13-1
- Print, 14-9
- Project Statistics, 15-23
- Reports, 14-11
- Resource Graph, 20-1, 23-5
- Resource Information, 18-4, 18-5
- Resource Usage, 19-8
- Tables, 13-8
- Task Dependency, 9-8
- Task Details, 11-4
- Task Information, 6-5, 9-7, 19-6
- Text Styles, 8-11
- Timescale, 8-12
- Update Project, 15-19
- View Definition, 13-6

Format
- Bar Style, 8-5
- Baseline Bar, 15-24
- Colors, 8-11
- Column, 8-4
- Column Width, 8-4
- Columns, 8-2
- Current Date, 21-4
- Date, 4-3
- Dependencies, 8-15
- Drawing, 24-1
- Gantt Chart Wizard, 15-24
- Gridlines, 8-14
- Hyperlink Color, 17-5
- Individual Bars, 8-7
- Individual Boxes, 10-4
- Links, 8-15
- Logic, 8-15
- Nonworking Time, 8-13
- Relationship Lines, 8-15
- Resource Graph, 20-2
- Row Height, 8-10
- Sight Lines, 21-4
- Status Date, 21-4
- Task Boxes, 10-3
- Text, 8-11
- Timescale, 8-12
- Timescale Font, 8-13
- Free Float, 2-8
- FTC, 21-14
- Group Definition, 16-6
- Layout, 8-8, 8-15
- Level Now, 20-8
- More Filters, 12-4
- More Groups, 16-6
- More Views, 13-1
- Print, 14-9
- Project Statistics, 15-23
- Reports, 14-11
- Resource Graph, 20-1, 23-5
- Resource Information, 18-4, 18-5
- Resource Usage, 19-8
- Tables, 13-8
- Task Dependency, 9-8
- Task Details, 11-4
- Task Information, 6-5, 9-7, 19-6
- Text Styles, 8-11
- Timescale, 8-12
- Update Project, 15-19
- View Definition, 13-6
Interim Baseline Calculation, 21-12
Jelen's Cost and Optimization
Engineering, 1-6
Lag, 9-4
Lags, 2-6
Late Baseline, 20-5
Layout Mode, 10-4
Leads, 2-6, 9-4
Legacy Formats, 17-14, 23-5
Legend, 14-6, 14-7
   Hide Bar on Legend, 8-5
Level Assignments, 20-8
Level can adjust individual assignments
on a task, 20-8
Level Now form, 20-8
Level of Plans, 1-6
Level within available slack, 20-8
Leveling calculations, 20-8
Leveling can create splits in remaining
work, 20-8
Leveling order, 20-8
Link and Unlink, 9-6, 10-3
Links, 9-1, Also See Logic
   Format, 8-15
   Projects, 17-3, 24-1
   Style, 10-2
   Update Automatic, 17-5
Lock First Column, 13-8
Logic
   Format, 8-15
   Hard, 9-2
   Links, 2-6, 9-1
   Looping, 2-7
   Preferred, 9-2
   Sequencing, 9-2
   Soft, 9-2
Look for overallocations on a, 20-8
Looping Logic, 2-7
Lower Pane, 25-1
Macro security, 17-14
Macros, 17-14, 22-6, 23-6, 24-1
Mandatory dependencies, 2-6
Manual Calculation, 9-10, 17-11
Manual Page Breaks, 8-14
Maps, 22-6
Mark Task As Milestone, 6-6
Mark-up Sheet, 15-8
Material
   Label, 18-2
   Resource, 18-2
Max Units, 18-3
mdb File Type, 3-1, 17-15
Menu Bar, 4-2
Microsoft.Access, 17-15
Middle Tier, 8-12
Milestones, 6-6
   Mark Task As, 6-6
Modules, 22-6
Moving Column, 8-4
mpd File Type, 3-1, 17-15, 23-1
mpp 98 Format File Type, 3-1
mpp File Type, 3-1, 17-15
mpt File Type, 3-1, 3-7, 17-15
mpx File Type, 3-1
Must Finish On Constraint, 11-2
Must Start On Constraint, 11-2
Negative Lag, 2-6
Network Diagram
   Layout Mode, 10-4
   Link color, 10-5
   Link Style, 10-2
   Screen, 25-2, 25-5
   View, 10-1, 13-1
New Project Pane, 3-3
Non Effort-driven, 19-2
Non-driving Relationships, 9-11, 23-4
Nonworking Time, 8-13
Nonworking Time Colors, 8-11
Objects, 24-1
OBS, 16-1
ODBC, 17-15
Options, 4-3, 17-1
   % Complete, 17-11
   Calculation, 17-11
   Calendar, 17-6
   Edit, 17-5
   General, 17-4
   Outline, 17-3
   Save, 17-15
   Spelling, 17-14
   View, 17-2
Organization Breakdown Structure, 16-1
Organizer, 13-6
   Copy a table to another Project, 8-2
   Copy Tables, 13-8
   Copying a Calendar, 5-13
   Copying a View to and from Another
   Project, 13-6
   Overview, 22-6
Organizing Tasks, 7-1
Outdent
   Level, 7-4
   Tasks, 7-2
Outline, 17-3
  Codes, 16-12
  Create, 7-1
  Level, 16-12
  Number, 16-1
  Number, 16-12
  Number, 17-3
  Symbol, 17-3

Outlining, 16-1
Outlook Tasks, 24-1
Output Resources, 18-1
Progress, 15-12
Overtime
  Rate, 18-3
  Rate - Default, 17-4
  Work, 19-5
Page
  Breaks, 8-14
  Set-up, 14-3
Pane
  Getting Started, 3-2
  Lower, 25-1
  New Project, 3-3
  Startup Task, 3-2
  Tasks, 3-3
  Upper, 25-1
Parent Task
  See Summary Task, 7-1
Paste
  as a Hyperlink, 24-1
  Cell, 22-1
  Link, 17-5
  Link – Cell Values in Columns, 22-5
  Row, 22-1
Paste Special, 24-1
PDM, 2-6
Percentage Complete
  Updating, 21-6
PERT, 9-3
  Analysis, 24-1
Phases, 1-5
Physical % Complete, 21-14
Picture Copy, 22-2
Pivot Table, 3-2
Planned Value, 21-14
Planning Cycle, 1-4
Planning Wizard, 17-4
PMBOK® Guide, 1-5
Precedence Diagramming Method, 2-6
Predecessor, 9-3
  Unique ID, 9-9
  WBS, 9-9
Predefined
  Group, 16-6
  Preferred Logic, 9-2
  PRINCE2, 1-5, 1-6
Printing, 14-1
  Borders, 14-5
  Fit timescale to end of page, 14-8
  Header and Footer, 14-6
  Legend, 14-7
  Manual page breaks, 14-9
  Margins, 14-5
  Notes, 14-8
  Page Set-up, 14-3
  Preview, 14-6
  Print all sheet columns, 14-8
  Print blank pages, 14-8
  Print left column of pages only, 14-9
  Print Preview, 14-2
  Resource Profiles, 20-4
  Tables, 20-4
  Task Notes, 11-6, 14-8
  Timescale, 14-9
  Zoom, 14-2
Priority
  Project, 3-4
  Task, 6-5, 20-8
  Privacy options, 17-14
  Program Plan, 1-6
Progress
  Recording, 15-8
  Summary Bars, 15-13
  Progress Lines, 15-23, 15-25
Project
  Calendar, 5-1, 5-2
  Code Prefix, 16-14
  Database, 17-15
  Finish Date, 3-4, 11-5
  Information, 3-4, 11-5
  Linking, 17-3
  Priority, 3-4
  Start Date, 3-4
  Statistics, 3-4
  Summary Task, 17-3
  Template, 3-7
  Update Date, 15-20
Project Breakdown Structure, 7-1, 16-1
Project Guide, 3-3, 17-16
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Summary Task 7-4</td>
<td></td>
</tr>
<tr>
<td>Hide and Display 17-3</td>
<td></td>
</tr>
<tr>
<td>Promoting Tasks 7-2</td>
<td></td>
</tr>
<tr>
<td>Properties 3-7</td>
<td></td>
</tr>
<tr>
<td>PV 21-14</td>
<td></td>
</tr>
<tr>
<td>Range of recurrence 5-4</td>
<td></td>
</tr>
<tr>
<td>Recalculate 17-11</td>
<td></td>
</tr>
<tr>
<td>Recurrence pattern 5-4</td>
<td></td>
</tr>
<tr>
<td>Recurring Tasks 22-3</td>
<td></td>
</tr>
<tr>
<td>Relationships 2-2</td>
<td></td>
</tr>
<tr>
<td>Diagram 25-2</td>
<td></td>
</tr>
<tr>
<td>Diagram Screen 25-5</td>
<td></td>
</tr>
<tr>
<td>Driving 9-11 23-4</td>
<td></td>
</tr>
<tr>
<td>Lines Formatting 8-15</td>
<td></td>
</tr>
<tr>
<td>Remaining Duration 15-10</td>
<td></td>
</tr>
<tr>
<td>Duration Summary Task 15-13</td>
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</tr>
<tr>
<td>Work 17-11 19-5</td>
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<tr>
<td>Rename</td>
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<td>Calendar 5-12</td>
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</tr>
<tr>
<td>Tables 8-3</td>
<td></td>
</tr>
<tr>
<td>Reordering Tasks 6-3</td>
<td></td>
</tr>
<tr>
<td>Reports 14-1 14-11</td>
<td></td>
</tr>
<tr>
<td>Reschedule uncompleted work to start after 15-19 21-3</td>
<td></td>
</tr>
<tr>
<td>Reschedule Work 15-23</td>
<td></td>
</tr>
<tr>
<td>Resetting Baseline 15-3</td>
<td></td>
</tr>
<tr>
<td>Resolving overallocations 20-8</td>
<td></td>
</tr>
<tr>
<td>Resource Assignment Unique ID 9-9</td>
<td></td>
</tr>
<tr>
<td>Resource Graph form 20-1 23-5</td>
<td></td>
</tr>
<tr>
<td>Resource Sharing 24-1</td>
<td></td>
</tr>
<tr>
<td>Resource Usage 20-3</td>
<td></td>
</tr>
<tr>
<td>Resource Usage View 21-10</td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
</tr>
<tr>
<td>Actual Work 19-5</td>
<td></td>
</tr>
<tr>
<td>Assigning 19-1</td>
<td></td>
</tr>
<tr>
<td>Assignment 19-4</td>
<td></td>
</tr>
<tr>
<td>Automatically Add 17-4</td>
<td></td>
</tr>
<tr>
<td>Availability 18-4</td>
<td></td>
</tr>
<tr>
<td>Base Calendar 18-4</td>
<td></td>
</tr>
<tr>
<td>Calendars 18-4</td>
<td></td>
</tr>
<tr>
<td>Cost Rate 18-6</td>
<td></td>
</tr>
<tr>
<td>Creating 18-2</td>
<td></td>
</tr>
<tr>
<td>Default Overtime Rate 17-4</td>
<td></td>
</tr>
<tr>
<td>Default Standard Rate 17-4</td>
<td></td>
</tr>
<tr>
<td>Form Screen 25-2 25-5</td>
<td></td>
</tr>
<tr>
<td>Graph Format 20-2</td>
<td></td>
</tr>
<tr>
<td>Graph Screen 25-2 25-6</td>
<td></td>
</tr>
<tr>
<td>Graph Units 20-2</td>
<td></td>
</tr>
<tr>
<td>Graph View 13-1</td>
<td></td>
</tr>
<tr>
<td>Graphs 20-1</td>
<td></td>
</tr>
<tr>
<td>Histograms 20-1</td>
<td></td>
</tr>
<tr>
<td>Information Form 18-4 18-6</td>
<td></td>
</tr>
<tr>
<td>Initial 18-2</td>
<td></td>
</tr>
<tr>
<td>Input 18-1</td>
<td></td>
</tr>
<tr>
<td>Material 18-2 21-7</td>
<td></td>
</tr>
<tr>
<td>Name Form Screen 25-6</td>
<td></td>
</tr>
<tr>
<td>Name Screen 25-2</td>
<td></td>
</tr>
<tr>
<td>Output 18-1</td>
<td></td>
</tr>
<tr>
<td>Overtime 19-5</td>
<td></td>
</tr>
<tr>
<td>Overtime Rate 18-3</td>
<td></td>
</tr>
<tr>
<td>Profiles Printing 20-4</td>
<td></td>
</tr>
<tr>
<td>Remaining Work 19-5</td>
<td></td>
</tr>
<tr>
<td>Replace Resource 19-4</td>
<td></td>
</tr>
<tr>
<td>Resource Name 18-2</td>
<td></td>
</tr>
<tr>
<td>Shared 18-1 19-1</td>
<td></td>
</tr>
<tr>
<td>Sheet Screen 25-2 25-7</td>
<td></td>
</tr>
<tr>
<td>Sheet View 13-1</td>
<td></td>
</tr>
<tr>
<td>Standard Rate 18-3</td>
<td></td>
</tr>
<tr>
<td>Summary Tasks 19-7</td>
<td></td>
</tr>
<tr>
<td>Tables 20-1 20-3</td>
<td></td>
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<tr>
<td>Unique ID 22-5</td>
<td></td>
</tr>
<tr>
<td>Units 18-3</td>
<td></td>
</tr>
<tr>
<td>Updating 21-7</td>
<td></td>
</tr>
<tr>
<td>Usage 20-1</td>
<td></td>
</tr>
<tr>
<td>Usage Screen 25-3 25-7</td>
<td></td>
</tr>
<tr>
<td>Usage View 13-1</td>
<td></td>
</tr>
<tr>
<td>Work 21-7</td>
<td></td>
</tr>
<tr>
<td>Responsibility 15-9</td>
<td></td>
</tr>
<tr>
<td>Retained Logic 15-12</td>
<td></td>
</tr>
<tr>
<td>Risk Analysis 2-7</td>
<td></td>
</tr>
<tr>
<td>Roll up Gantt bar to summary 8-8</td>
<td></td>
</tr>
<tr>
<td>Roll Up Summary Tasks 7-3</td>
<td></td>
</tr>
<tr>
<td>Rolling Wave 1-5</td>
<td></td>
</tr>
<tr>
<td>Round Bars to Whole Days 8-9</td>
<td></td>
</tr>
<tr>
<td>Row</td>
<td></td>
</tr>
<tr>
<td>Copy 22-1</td>
<td></td>
</tr>
<tr>
<td>Cut 22-1</td>
<td></td>
</tr>
<tr>
<td>Height 8-10 13-8</td>
<td></td>
</tr>
<tr>
<td>Paste 22-1</td>
<td></td>
</tr>
<tr>
<td>Saving Additional Project Information 3-7</td>
<td></td>
</tr>
<tr>
<td>Schedule From Project Finish Date 11-5</td>
<td></td>
</tr>
<tr>
<td>Schedule Variance 21-14</td>
<td></td>
</tr>
<tr>
<td>Scheduling the Project 9-10</td>
<td></td>
</tr>
<tr>
<td>S-Curves 20-4 20-5</td>
<td></td>
</tr>
<tr>
<td>Security 17-14 23-5</td>
<td></td>
</tr>
<tr>
<td>Select All Button 4-1</td>
<td></td>
</tr>
<tr>
<td>Send To 24-1</td>
<td></td>
</tr>
<tr>
<td>Sequencing Logic 2-6 9-2</td>
<td></td>
</tr>
<tr>
<td>Shared Resources 19-6</td>
<td></td>
</tr>
<tr>
<td>Shared Resources 18-1</td>
<td></td>
</tr>
<tr>
<td>Shared Resources 19-1</td>
<td></td>
</tr>
</tbody>
</table>
Sheet
  Columns, 8-14
  Rows, 8-14
Shifts, 5-8
Show
  Subtasks, 7-3
  Tasks, 7-3
Sight Lines Format, 21-4
Single View, 13-2, 25-1
Slack, 2-7
Soft Logic, 9-2
Software Patch, 23-6
Split
  In-progress Tasks, 15-19, 17-9
  Show bars splits, 8-9
  Tasks, 8-9, 21-11, 22-4
Splitting the Screen, 4-5
Stage Plan, 1-6
Stakeholder Analysis, 2-2
Standard Rate, 18-3
Start No Earlier Than Constraint, 11-1, 11-2
Start No Later Than Constraint, 11-2
Start Time - Default, 17-6
Start Variance, 17-6
Start-to-Finish Relationship, 9-3
Start-to-Start Relationship, 9-3
Startup Task Pane, 3-2
Status Bar, 4-2
Status Date, 3-4, 8-14, 15-1, 15-13, 21-1, 21-3
  Calculation Options, 15-21, 15-23, 17-12
  Format, 21-4
Statusing Report, 15-8
Sub-project, 1-5
Successor, 9-3
WBS, 9-9
Summary Task
  % Complete, 15-13, 15-18
  Actual Start and Finish Dates, 15-13
  Bar Progress Calculation, 15-13
  Cost and Hours, 19-7
  Create, 7-1
  Dependencies, 9-5
  Duration Calculation, 7-3
  Hide and Display, 17-3
  Interim Baseline Calculation, 21-12
  Project, 7-4
  Start and Finish Date Calculation, 7-1
  Summarizing, 7-3
Summary Task Interim Baseline Calculation, 15-4
Summary Tasks
  Earned Value, 21-14
SV, 21-14
System Breakdown Structure, 16-1
Table
  Applying, 13-7
  Create, 13-8
  Edit, 13-8
Tables - Resource, 20-1
  Data Exporting, 20-4
  Printing, 20-4
  View, 13-5
Target, 1-4
Target Dates, 15-1, 21-1
Task
  Calendar, 6-7
  Copy, 6-3
  Copy from other Programs, 6-4
  Create Summary, 7-1
  Dependency Form, 9-8
  Detailed, 7-1
  Details Form Screen, 25-3, 25-8
  Estimated Durations, 17-10
  Form Screen, 25-3, 25-8
  Indenting, 7-2
  Information Form, 19-6
  Name, 6-2
  Name Form Screen, 25-3, 25-9
  Notes, 11-6
  Number, 6-2
  Outending, 7-2
  Priority, 6-5
  Promoting, 7-2
  Recurring, 22-3
  Reordering, 6-3
  Roll Up Summary, 7-3
  Sheet Screen, 25-3, 25-9
  Show, 7-3
  Splitting, 21-11, 22-4
  Summarizing, 7-3
  Unique ID, 22-5
  Update, 15-16
  Usage, 20-1
  Usage Screen, 25-3
  Will Honor Their Constraint Dates, 17-10
Task Type
  Fixed Duration, 19-2
  Fixed Units, 19-2
  Fixed Work, 19-2
Task Usage, 20-3

Screen, 25-10

View, 21-10

Tasks Pane, 3-3

Team Plan, 1-6

Template, 3-6, 3-7, 17-15

Text

Colors, 8-11

Format, 8-11

Text Box, 11-6

Timescale, 8-12

Format, 8-12

Format Colors, 8-11

Format Font, 8-13

Zoom, 20-2

Title

Horizontal and Vertical, 8-14

Toolbar, 4-2

Analysis, 20-4, 24-1

Customize, 4-2

Tracking, 15-23

View Bar, 4-2

Top Tier, 8-12

Total Float, 2-8, 9-10

Tracking

Gantt View, 13-1

Tracking Toolbar, 15-23

txt File Type, 3-2

Type Work or Materials, 18-2

Unique ID, 9-9

Predecessor, 9-9

Resource Assignment, 22-5

Successor, 9-9

Task, 22-5

Unique Resource Assignment ID, 9-9

Unique Resource ID, 9-9

Units, 17-5

Resource Graph, 20-2

Units per Time Period, 19-2

Update

Material Resources, 21-7

Project, 15-14, 15-15

Project Form, 15-19

Tasks, 15-14, 15-16

Work as Completed Through, 21-3

Work Resources, 21-7

Update as Scheduled, 15-23

Update Tasks, 15-23

Upper Pane, 25-1

Usage

Resource, 20-1

Task, 20-1

User Defined WBS, 16-14

Value(s) - Filters, 12-6

View

Applying, 13-3

Calendar, 13-1

Combining, 25-1

Copy and Editing, 13-6

Gantt, 13-1

Network Diagram, 10-2, 13-1

Resource Graph, 13-1

Resource Sheet, 13-1

Resource Usage, 21-10

Single, 25-1

Tables, 13-5

Task Usage, 21-10

Tracking Gantt, 13-1

Understanding, 13-2

View Bar, 13-3

Zoom Gantt Chart, 8-13

Zoom Network Diagram, 10-1

View Bar, 4-2

Virus, 17-14, 23-6

Visual Basic Macros, 22-6

WBS, 1-5

Function, 16-13

Predecessor, 9-9

Project Code Prefix, 16-14

Renumber, 16-14

Successor, 9-9

User Defined, 16-14

Web Page, 3-2

Week Starts On, 17-6

Wild Cards - Filters, 12-5

Work After Date, 21-1

Work Breakdown Structure, 1-5, See WBS

Work Contour, 19-8

Work Package, 1-5

Working Hours, 5-5, 5-7

Workspace, 24-1

xml File Format, 3-2

Zoom

Gantt Chart, 8-13

Network Diagram, 10-1

Printing, 14-2

Timescale Resource Graph, 20-2