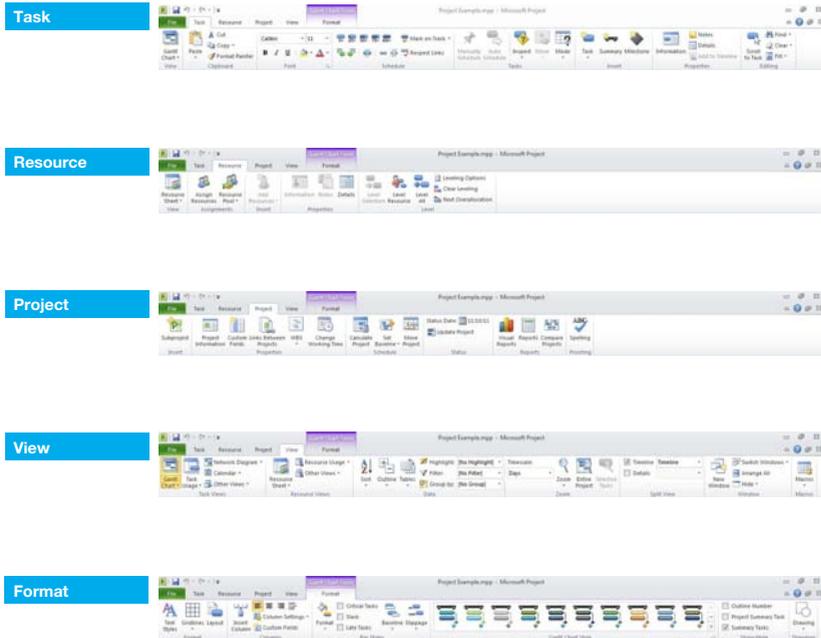


Project 2010 Tabs



Certification Test Goals

This module sets out essential concepts and skills relating to the ability to use project management software to prepare project plans and monitor projects including planning and managing time, costs, tasks, and resources.

Successful candidates will be able to:

- Understand the key concepts relating to managing projects.
- Use a project management application to create a new project and maintain an existing project.
- Create and schedule tasks and add project constraints and deadlines.
- Assign costs and create and assign resources to tasks.
- View the critical path, monitor progress and reschedule work.
- Prepare and print outputs, including charts and reports.

Keyboard Shortcuts

General

- Open **CTRL+O**
- Save **CTRL+S**
- Print **CTRL+P**
- Close **CTRL+W**
- Undo **CTRL+Z**
- Redo **CTRL+Y**
- Help **F1**
- Switch between apps **ALT+TAB**

Editing

- Cut **CTRL+X**
- Copy **CTRL+C**
- Paste **CTRL+V**

Outline

- Hide subtasks **ATL+SHIFT+HYPHEN**
- Indent a selected task **ATL+SHIFT+RIGHT ARROW**
- Show subtasks **ATL+SHIFT+=**
- Show all tasks **ATL+SHIFT+***

1 Project Management Tools

1.1 Key Concepts

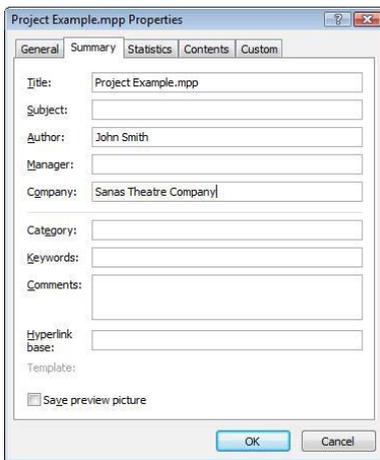
- 1.1.1 **Understand the term project.**
 - A temporary and often collaborative activity that is carefully planned to achieve a particular aim.
- 1.1.2 **Recognise the main elements of managing a project like:**
 - Planning the project
 - Managing the schedule
 - Communicating project information
- 1.1.3 **Understand the advantages of using a project management application like:**
 - Efficient project design
 - Ease of project plan maintenance
 - Effective activity representation
 - Ease of monitoring and reporting
- 1.1.4 **Understand the tools and features of a project management application like:**
 - A **Gantt chart** is a type of bar chart that illustrates a project schedule, including start and finish dates.
 - A **network diagram** is a model designed to analyse and represent the tasks involved in completing a project.
 - A **work breakdown structure** is a tool used to define and group a project's tasks, so as to organise and define the total work of the project.
- 1.1.5 **Recognise that managing projects involves balancing:**
 - Work
 - Time
 - Resources
 - Cost

- 2.1.1 **Close a project management application.**
 - Click the **File** tab.
 - Click **Exit**.
- 2.1.1 **Open projects.**
 - Click the **File** tab.
 - Click **Open**.
 - Select project(s) to open and click **Open**.
- 2.1.1 **Close projects.**
 - Click the **File** tab.
 - Click **Close**.
- 2.1.2 **Save a project to a location on a drive.**
 - Click the **File** tab.
 - Click **Save**.
 - Create a file name and select the location.
 - Click **Save**.
- 2.1.2 **Save a project under another name to a location on a drive.**
 - Click the **File** tab.
 - Click **Save As**.
 - Enter a new file name over the existing file name and select the location.
 - Click **Save**.
- 2.1.3 **Save a project as another file type like: template, web page, spreadsheet, CSV, XML, text file, pdf.**
 - Click the **File** tab.
 - Select **Save As**.
 - Click on the **Save as type** drop-down menu and select a file type.
 - Click **Save**.
- 2.1.4 **Change between project view modes like: Gantt chart, network diagram.**
 - On the **Task** tab, in the **View** group, click the **Gantt Chart** arrow below the **Gantt Chart** button.
 - Click **Gantt Chart** or **Network Diagram** to switch to the selected view.

- 2.1.5 **Use magnification/zoom tools.**
 - On the **View** tab, in the **Zoom** group, click the **Zoom** button.
 - Select the zoom option required.
 - Click **OK**.
- 2.2 **Starting a New Project**
 - 2.2.1 **Create a new project based on default template.**
 - Click the **File** tab.
 - Click **New**.
 - Click **Blank project**.
 - Click **Create**.
 - 2.2.1 **Create a new project based on other available template.**
 - Click the **File** tab.
 - Click **New**.
 - Click **My templates**.
 - Click to select a template.
 - Click **OK**.
 - 2.2.2 **Understand how choosing to schedule from a start date, finish date will impact on the project schedule.**
 - **Schedule from a start date** - All tasks will start as soon as possible by default
 - **Schedule from a finish date** - Tasks on the critical path are started as late as possible by default
 - 2.2.3 **Enter basic project information such as start date or finish date, scheduling options and project properties like: project title, project manager.**
 - Click the **File** tab.
 - Click **Info**.
 - Click **Project Information** and **Advanced Properties**.

2 Project Creation

- 2.1 **Working with Projects**
 - 2.1.1 **Open a project management application.**
 - Click the **Start** button.
 - Select **All Programs**.
 - Click **Microsoft Project 2010**.



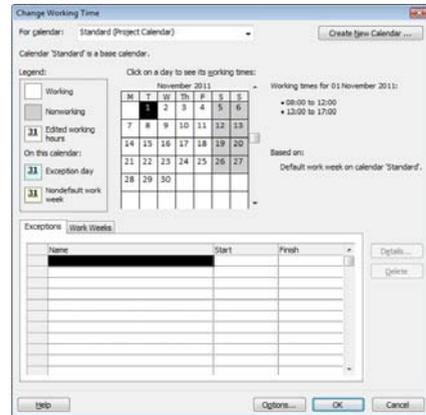
- Enter a project title in the **Title** text box.
- Enter a project manager in the **Manager** text box.
- Click **OK**.

2.2.4 Set up calendar options like: base calendar.

- On the **Project** tab, in the **Properties** group, click the **Project Information** button.
- Select a calendar from **24 Hours, Night Shift, Standard**.
- Click **OK**.

2.2.4 Set up calendar options like: working time.

- On the **Project** tab, in the **Properties** group, click the **Change Working Time** button.
- Click the **Work Weeks** tab.
- Double-click on **[Default]** in the **Name** column.
- Edit a day(s) working time.
- Click **OK**.



2.2.4 Set up calendar options like: nonworking time.

- On the **Project** tab, in the **Properties** group, click the **Change Working Time** button.
- Click the **Work Weeks** tab.
- Double-click on **[Default]** in the **Name** column.
- Edit a day(s) nonworking time.
- Click **OK**.

3 Tasks

3.1 Creating Tasks

3.1.1 Create tasks.

- Click into an empty **Task Name** field.
- Enter a task name.

3.1.1 Modify tasks.

- Click into a **Task Name** field.
- Enter additional task name content or delete existing task name content.

3.1.2 Copy tasks.

- Click on a task in the **Task Name** column.
- On the **Task** tab, in the **Clipboard** group, click the **Copy** button.
- Click on a new location within the **Task Name** column.
- On the **Task** tab, in the **Clipboard** group, click the **Paste** button.

3.1.2 Move tasks.

- Click on a task in the **Task Name** column.
- On the **Task** tab, in the **Clipboard** group, click the **Cut** button.
- Click on a new location within the **Task Name** column.
- On the **Task** tab, in the **Clipboard** group, click the **Paste** button.

3.1.2 Delete tasks.

- Select the row containing the task to delete.
- Press the **Delete** key.

3.1.3 Create subtasks and summary tasks.

- To create a subtask, on the **Task** tab, in the **Schedule** group, click the **Indent Task** button.
- To create a summary task, on the **Task** tab, in the **Schedule** group, click the **Outdent Task** button.

3.1.3 Modify subtasks and summary tasks.

- To modify a summary task to be a subtask, on the **Task** tab, in the **Schedule** group, click the **Indent Task** button.
- To modify a subtask to be a summary task, on the **Task** tab, in the **Schedule** group, click the **Outdent Task** button.

3.1.3 View subtasks and summary tasks.

- To view subtasks, on the **View** tab, in the **Data** group, click the **Show Outline** button.
- Click **Show Subtasks**.
- To view summary tasks, on the **View** tab, in the **Data** group, click the **Show Outline** button.
- Click **Hide Subtasks**.

3.1.4 Understand task duration options:

- **Elapsed** task duration is based on a 24-hour day and a 7-day week, including holidays and other nonworking days.
- **Duration** is the active working time to complete a task.
- **Effort** is the amount of work required to carry out a task; for example, two people working for three days is 6 days effort (or work).
- **Estimated** task duration is the estimated working time to complete a task, shown by a ?; for example, 1 day?

3.1.5 Set task duration.

- In the **Duration** column, click on the **Duration** for a task.
- Enter the duration required; for example 1D for 1 day.
- Press the **Return** key.

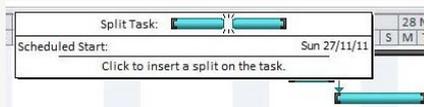
3.1.5 Modify task duration.

- In the **Duration** column, click on the **Duration** for the task to modify.
- Change the duration or delete the duration.
- Press the **Return** key.

Duration in	Time unit abbreviation
Minutes	M
Hours	H
Days	D
Weeks	W
Months	Mon

3.1.6 Split tasks.

- On the **Task** tab, in the **Schedule** group, click the **Split Task** button.
- In the Gantt Chart, click the location on a task to create a split.



3.1.7 Understand the term milestone.

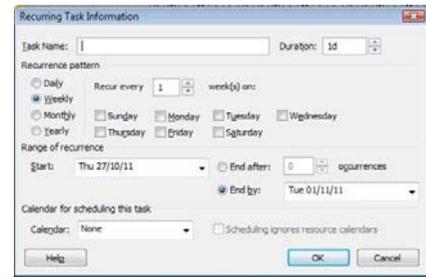
- A reference point used to mark a point in time or a major event in a project.

3.1.8 Create project milestones.

- On the **Task** tab, in the **Insert** group, click the **Milestone** button.

3.1.9 Create, modify recurring tasks.

- On the **Task** tab, in the **Insert** group, click the **Task** arrow below the **Task** button.
- Click **Recurring Task**.
- Enter the recurring task information.

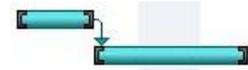


- Click **OK**.

3.2 Scheduling and Relationships

3.2.1 Understand logical relationships between tasks: finish to start, start to start.

- **Finish to start** – The second task cannot start until the first task finishes.



- **Start to start** – The second task can start as soon as the first task starts.



3.2.2 Create relationships between tasks: finish to start.

- To create a finish to start relationship, select the tasks to create a relationship between.
- On the **Task** tab, in the **Schedule** group, click the **Link Tasks** button.

3.2.2 Create relationships between tasks: start to start.

- To create a start to start relationship, select the tasks to create a relationship between.
- On the **Task** tab, in the **Schedule** group, click the **Link Tasks** button.
- In the Gantt Chart, double-click on the relationship arrow.
- In the task dependency, change the **Type** to **Start-to-Start (SS)**.



- Click **OK**.

3.2.2 Modify relationships between tasks: finish to start, start to start.

- In the Gantt Chart, double-click on the relationship arrow between two tasks.
- In the task dependency, change the **Type** to **Start-to-Start (SS)** or **Finish-to-Start (FS)**.
- Click **OK**.

3.2.2 Delete relationships between tasks: finish to start, start to start.

- In the Gantt Chart, double-click on the relationship arrow.
- Click **Delete**.

3.2.3 Understand the terms lead time, lag time.

- **Lead time** – An overlap between tasks that have a dependency
- **Lag time** – A delay between tasks that have a dependency

3.2.4 Add task lag time, lead time.

- On the **Task** tab, in the **Properties** group, click the **Information** button.
- In **Task Information**, click the **Predecessors** tab and select the relevant lag cell.
- To enter lead time, type a negative number or negative percentage, such as -2d for two days of lead time.

- To enter lag time, type a positive number or percentage, such as 50% for half the predecessor task's duration in lag time.
- Click **OK**.

3.2.4 Edit task lag time, lead time.

- On the **Task** tab, in the **Properties** group, click the **Information** button.
- In **Task Information**, click the **Predecessors** tab and select the relevant lag cell.
- To edit lead time, type a negative number or negative percentage.
- To edit lag time, type a positive number or percentage.
- Click **OK**.

3.3 Constraints and Deadlines

3.3.1 Understand task constraint options like:

- **As late as possible** – Task will start as late as possible based on other constraints and relationships
- **As soon as possible** – Task will start as soon as possible based on other constraints and relationships
- **Must finish on** – Task will finish on the specified date
- **Must start on** – Task will start on the specified date

3.3.2 Add constraints to tasks.

- On the **Task** tab, in the **Properties** group, click the **Information** button.
- In the **Task Information**, click the **Advanced** tab.
- Choose a **Constraint type** and a **Constraint date**.
- Click **OK**.

3.3.2 Modify constraints to tasks.

- On the **Task** tab, in the **Properties** group, click the **Information** button.
- In the **Task Information**, click the **Advanced** tab.
- Modify the **Constraint type** and **Constraint date**.
- Click **OK**.

3.3.2 Delete constraints to tasks.

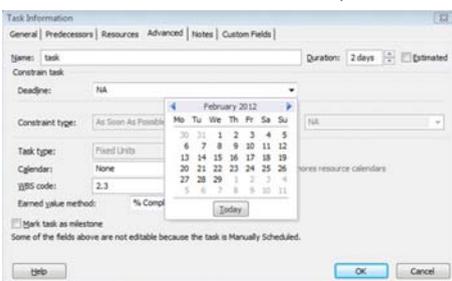
- On the **Task** tab, in the **Properties** group, click the **Information** button.
- In the **Task Information**, click the **Advanced** tab.
- Modify the **Constraint type** to **As Soon As Possible**.
- Click **OK**.

3.3.3 Understand the term deadline.

- The latest date by which a task should be completed.

3.3.4 Create a deadline.

- On the **Task** tab, in the **Properties** group, click the **Information** button.
- In the **Task Information**, click the **Advanced** tab.
- Click a deadline from the **Deadline** drop-down box.



- Click **OK**.

3.4 Notes, Hyperlinks

3.4.1 Add a note for a task.

- Select a task.
- On the **Task** tab, in the **Properties** group, click the **Task Notes** button.
- Enter the note.
- Click **OK**.

3.4.1 Edit a note for a task.

- Select a task.
- On the **Task** tab, in the **Properties** group, click the **Task Notes** button.
- Edit the text of the note.
- Click **OK**.

3.4.1 Remove a note for a task.

- Select a task.
- On the **Task** tab, in the **Properties** group, click the **Notes** button.

- Delete the text of the note.
- Click **OK**.

3.4.2 Insert a hyperlink for a task.

- Right-click on the task and select **Hyperlink**.
- Select the file, location or e-mail address to hyperlink to.
- Click **OK**.

3.4.2 Edit a hyperlink for a task.

- Right-click on the task and select **Hyperlink**.
- Edit the file, location or e-mail address to hyperlink to.
- Click **OK**.

3.4.2 Remove a hyperlink for a task.

- Right-click on the task and select **Hyperlink**.
- Click **Clear Hyperlinks**.
- Click **OK**.

4 Resources and Costs

4.1 Resources

4.1.1 Identify resource types like:

- People
- Materials
- Equipment

4.1.2 Understand the relationship between duration, work and resource. Understand that if one element changes there is an impact on another element.

- **Duration** multiplied by **Resource Units** equals **Work**.
 $16 \text{ hours} \times 300\% = 48 \text{ hours}$
- **Work** divided by **Resource Units** equals **Duration**.
 $48 \text{ hours} / 300\% = 16 \text{ hours}$
- **Work** divided by **Duration** equals **Resource Units**.
 $48 \text{ hours} / 16 \text{ hours} = 300\%$
- If one element of the formula changes there is an impact on another element, for example an increase in duration will lead to an increase in work.

4.1.3 Create, delete resources.

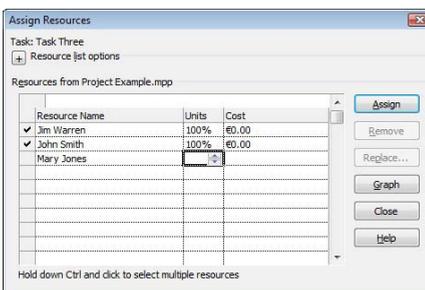
- On the **Resource** tab, in the **View** group, click the **Resource Sheet** button.
- Enter or delete the details of a resource.
- Press the **Return** key.

4.1.3 Modify resource details like: name, type, units, rates.

- On the **Resource** tab, in the **View** group, click the **Resource Sheet** button.
- Enter or delete the details of a resource.
- Press the **Return** key.

4.1.4 Add resource assignments and associated units.

- Select a task.
- On the **Resource** tab, in the **Assignments** group, click the **Assign Resources** button.



- Select the resource to assign and enter the units required.
- Click **Assign**.

4.1.4 Remove resource assignments and associated units.

- Select a task.
- On the **Resource** tab, in the **Assignments** group, click the **Assign Resources** button.
- Select the resource to remove.
- Click **Remove**.

4.1.4 Replace resource assignments and associated units.

- Select a task.
- On the **Resource** tab, in the **Assignments** group, click the **Assign Resources** button.
- Select the resource to replace.

- Click **Replace**.
- Choose a new resource.
- Click **OK**.

4.2 Costs

4.2.1 Understand the terms fixed cost, variable cost.

- **Fixed cost** is a set cost for a task regardless of task duration or work performed by a resource.
- **Variable cost** is a cost that changes throughout the project depending on its availability or use.

4.2.2 Assign, modify fixed costs.

- In the task list, assign, modify the fixed cost in the **Fixed Cost** column for the relevant task.
- Press the **Return** key.

4.2.3 Assign, modify variable costs.

- On the **Resource** tab, in the **View** group, click the **Resource Sheet** button.
- Enter the costs required for the resource.
- Press the **Return** key.
- In the task list, assign the resource to a task and view the **Cost** column for the task.
- Press the **Return** key.

5 Project Monitoring

5.1 Critical Path

5.1.1 Understand the terms critical task, critical path.

- **Critical task** - A task on the critical path
- **Critical path** - A sequence of tasks that must all be completed on time for the project to finish on schedule

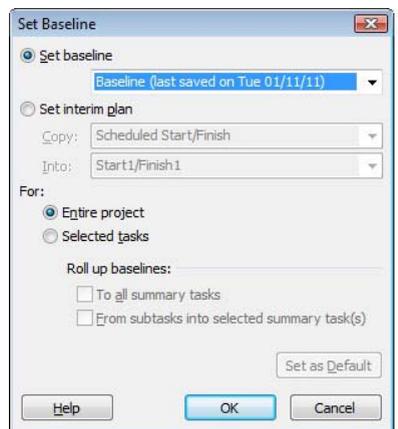
5.1.2 Identify critical tasks and show the critical path.

- On the **Format** tab, in the **Bar Styles** group, check the **Critical Tasks** checkbox.
- Critical tasks will now appear in red on the Gantt chart.

5.2 Monitoring Progress and Rescheduling

5.2.1 Create, save a baseline.

- On the **Project** tab, in the **Schedule** group, click the **Set Baseline** button.
- Click **Set Baseline**.
- In the **Set Baseline** dialog box, click **Set Baseline** and click for the **Entire project** or **Selected tasks**.

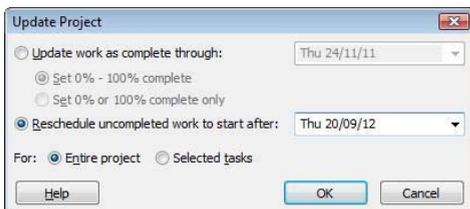


- Click **OK**.

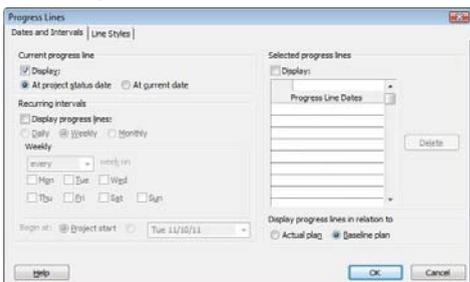
5.2.1 Clear a baseline.

- On the **Project** tab, in the **Schedule** group, click the **Set Baseline** button.
- Click **Clear Baseline**.
- In the **Clear Baseline** dialog box, click on a baseline in the **Clear baseline plan** drop-down box.
- Click to clear for the **Entire project** or **Selected tasks**.
- Click **OK**.

- 5.2.2 **Show, hide progress line.**
- On the **Format** tab, in the **Format** group, click the **Gridlines** button.
 - Click **Progress Lines**.
 - Select, deselect to display a current progress line.
 - Select, deselect to display at recurring intervals.
 - Click **OK**.
- 5.2.3 **Show columns like: % complete, fixed cost, deadline.**
- On the **Format** tab, in the **Columns** group, click the **Insert Column** button.
 - Select a column type.
- 5.2.3 **Hide columns.**
- Select the column to hide.
 - On the **Format** tab, in the **Columns** group, click the **Column Settings** button.
 - Click **Hide Column**.
- 5.2.4 **Sort tasks.**
- On the **View** tab, in the **Data** group, click the **Sort** button.
 - Select a sort type to apply or select **Sort By** to create a custom sort.
- 5.2.4 **Filter tasks.**
- On the **View** tab, in the **Data** group, click the **Filter** drop-down menu box.
 - Select a built in filter to apply or select **More Filters** for additional filter options.
- 5.2.5 **Update task progress.**
- On the **Task** tab, in the **Schedule** group, click the desired **% Complete** button.
- 5.2.6 **Reschedule incomplete work.**
- On the **Project** tab, in the **Status** group, click the **Update Project** button.
 - Click **Reschedule uncompleted work to start after** and select a date.
 - Select either to reschedule for the entire project or selected tasks.



- Click **OK**.
- 5.2.7 **Display current project schedule and baseline.**
- On the **Format** tab, in the **Format** group, click the **Gridlines** button and click **Progress Lines**.
 - Select to display the **Current progress line**.
 - Select to display progress line in relation to the **Baseline plan**.



- If the baseline is not visible, on the **Format** tab, in the **Bar Styles** group, click the **Baseline** button and click a baseline to view.
- Click **OK**.

6 Prepare Outputs

- 6.1 **Setup**
- 6.1.1 **Change page orientation: portrait, landscape.**
- On the **File** tab, click **Print**.
 - Click **Portrait Orientation** or **Landscape Orientation**.
- 6.1.1 **Change paper size.**
- On the **File** tab, click **Print**.
 - Select a paper size.
- 6.1.2 **Change page margins: top, bottom, left, right.**
- On the **File** tab, click **Print**.
 - Click **Page Setup**.
 - On the **Margins** tab, enter a top, bottom, left, right margin.
 - Click **OK**.
- 6.1.3 **Prepare a Gantt chart, network diagram for print using options like: columns to print, notes.**
- On the **File** tab, click **Print**.
 - Click **Page Setup**.
 - Click the **View** tab.
 - To print all sheet columns, check the print all sheet columns checkbox.
 - To print a specified number of columns, check the print first [insert required number] columns on all pages option and enter the required number.
 - Check the print notes checkbox to print notes.
 - Click **OK**.
- 6.2 **Print**
- 6.2.1 **Preview a Gantt chart, network diagram, report.**
- On the **File** tab, click **Print**.
 - A preview is available on screen.
- 6.2.2 **Print a Gantt chart, network diagram, report from an installed printer using output options like: entire document, specific pages, number of copies.**
- On the **File** tab, click **Print**.
 - Click the **Print** button.
 - To print the complete project, under **Settings**, select **Print Entire Project**.
 - To print specific pages, under **Settings**, select **Print Specific Pages** and enter specific page numbers and/or page ranges (dates) to print.
 - Under **Copies**, enter the number of copies to print.
 - Click **Print**.

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