

Chapter 1

Project Management: What Is It, and Why Should I Care?

In This Chapter

- ▶ Discovering how traditional project management makes the move to software
- ▶ Understanding what elements of a project are managed in Project
- ▶ Understanding the role of a project manager
- ▶ Exploring the role of the Internet in project management
- ▶ Getting started using the New Project Wizard

Welcome to the world of computerized project management with Microsoft Project. If you've never used project management software before, you're entering a brave, new world. It will be like walking from an office of twenty years ago — with no fax, voicemail, or e-mail — into the office of today with its wealth of high-tech devices.

Everything you used to do with handwritten to-do lists and word processors and spreadsheets all come magically together in Project. But this transition won't come in a moment, and it will take some basic understanding of exactly what project management software can do to get up to speed. If you've used Project before, this little overview will help you refresh your memory, and ease you into a few of the new features of Project 2003.

So, even if you're a seasoned project manager, take a minute to review this chapter — it provides the foundation for how you'll work with Project from here on.

The ABCs of Project Management

You probably handle projects day in and day out. Some are obvious just because your boss named them so that any fool would know they're projects:

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The Acme Drilling Project, or the Network Expansion IT Project, for example. Others are less obvious, such as that speech thing you have to do on Saturday for your professional association or washing the dog.

Project management is simply the process of managing all the elements of a project, whether that project is large or small. Do you need to organize a company holiday party? It's a project. Have you been handed a three-year earth-exploration initiative to find oil in Iowa, coordinating subcontractors and government permits and working with a team of 300 people? That's definitely a project. Yes, even that speech thing is a project, because it has certain characteristics that need managing.

Understanding what your projects, large or small, have in common is the basis of understanding what Project can do for you. All projects have

- ✓ An overall goal
- ✓ A project manager
- ✓ Individual tasks to be performed
- ✓ Timing for those tasks to be completed (such as three hours, three days, or three months)
- ✓ Timing relationships between those tasks (for example, you can't begin using a new manufacturing process until you've trained people in the process)
- ✓ Resources (people, equipment, facilities, supplies, and so on) to do the work
- ✓ A budget (the costs associated with people, equipment, facilities, supplies, and so on)

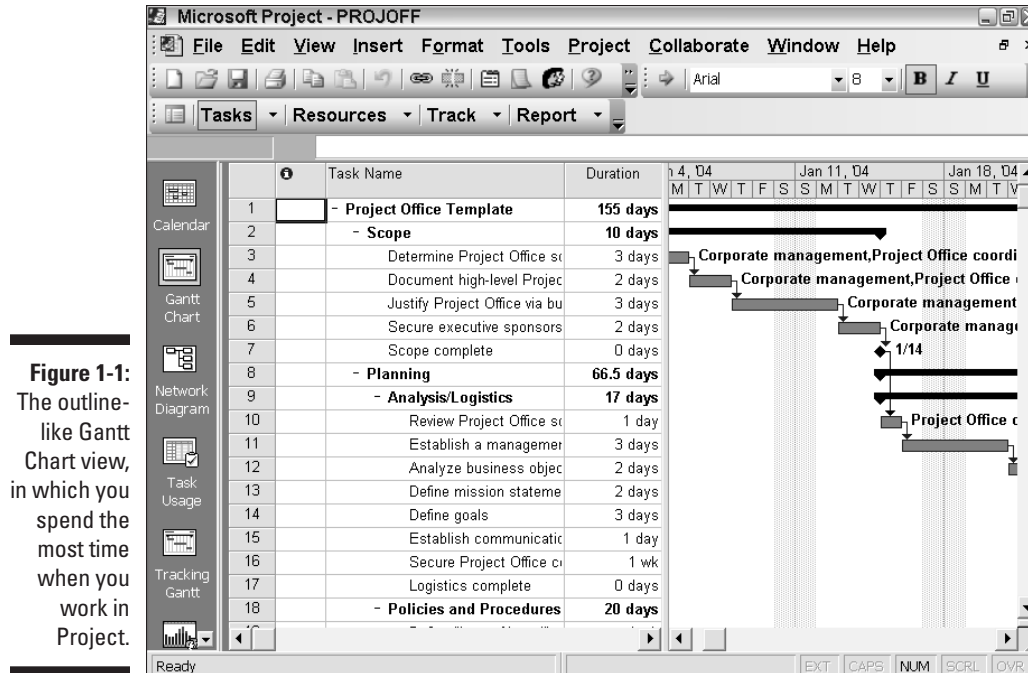
Three Ts: Tasks, timing, dependencies (well, two Ts and a D)

As Lewis Carroll said, "If you don't know where you're going, any road will get you there." So first things first: You have to understand the goal of your project so you can begin to build the *tasks* that have to be performed to get you there.

A *task* is pretty much one of those items you used to scribble on your hand-written to-do lists, such as *Write Final Report* or *Apply for Permits*. Tasks are typically organized into *phases* (appropriate stages) in Project, arranged in an outline-like structure (as you can see in the project shown in Figure 1-1).

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Task master

A task can be as broad or as detailed as you like. For example, you can create a single task to research your competition, or you can create a project phase that consists of a *summary task* and *subtasks* below it. The summary task might be (for example) *Competitive Research*, for which the subtasks might include *Researching online business databases*, *Assembling company annual reports*, and *Reviewing competitive product lines*.

Adding tasks to a Project file doesn't cost you a thing (except a nanobit of memory), so remember that a project can have as many tasks and as many phases as you like. You simply use the outlining structure in Project to indent various levels of tasks. The more deeply indented in an outline a task is, the more detailed.

One handy thing about this outlining structure is that you can roll up all the timing and cost data from the subtasks within your phases into summary-level tasks. So three sequential subtasks, each taking a day to complete and costing you \$200 apiece, result in a summary task that spans three days and costs \$600. You can view your project at various levels of detail or get automatic tallies of timing and costs if you prefer to simply view the summary level of tasks.

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For more about defining and creating tasks, check out Chapter 4.

It's all in the timing

They say timing is everything: Rome wasn't built in a day, a stitch in time saves nine, and don't even ask me about selling short in the stock market. The importance of timing applies to Project tasks, as well. Almost all tasks have timing, which is referred to as duration. A task's *duration* is the amount of time it will take to complete the task.

The only tasks without duration are milestones. A *milestone* is a task of zero duration; in essence it simply marks a moment in time that must be reflected in your Project outline. Typical milestones are the approval of a brochure design or an assembly line startup.

Project doesn't provide magic formulas for duration: Duration is assigned based on your own experience and judgment. Does designing a product package take three days or three weeks? Will obtaining a building permit happen in a day or a month? (Remember, you're dealing with City Hall, so think before you answer!) Project isn't an oracle: You have to provide facts, figures, and educated guesses to build your Project schedule. But after that information is entered, Project can do some weird and wonderful things with it that help you maintain and monitor your progress.

Task codependencies

The final piece in the puzzle of how long your project will take is something called dependencies. *Dependencies* are the timing relationships among tasks. If you have a schedule that includes ten tasks that all begin at the same moment in time, your entire project would take as long as the longest task (see Figure 1-2).

After you define and implement timing relationships, your schedule can stretch out over time like a long rubber band. One task might begin only after another is finished. Another task can start halfway through the preceding task. The second task can only start a week after the first task is over. Only after you've started to assign these relationships can you begin to see a project's timing as related not just to each task's duration, but also to the specific ways that the tasks relate to each other.

Here are some examples of dependencies:

- ✓ You can't begin to use a new piece of equipment until you install it.
- ✓ You must wait for a freshly poured concrete foundation to dry before you can begin to build on it.
- ✓ You can't start to ship a new drug product until the FDA has approved it.

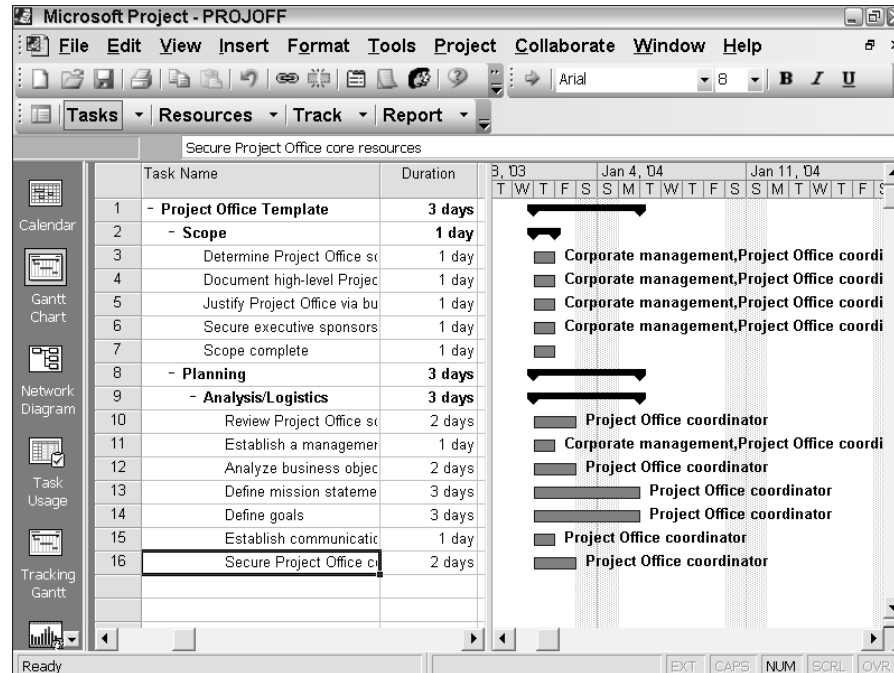


Figure 1-2:
This
schedule
includes
tasks with
timing but
no depen-
dencies.

One other brief note about the timing of tasks: In addition to applying dependencies to tasks, you can apply *constraints*. For example, let's say you don't want to start shipping your new ice-cream flavor until you get the ad for it in your Christmas catalog. So you set a dependency between those two events. But you can also set a constraint that says you must start producing the ice cream no later than November 3. In this case, if you don't make the catalog deadline, the product will still ship on November 3; that task will not be allowed to slip its constraint because of a dependency relationship.

You can find out more about the fine art of managing dependencies and constraints in Chapter 6.

Lining up your resources

When people first use Project, some get a bit confused about the topic of resources. Resources aren't just people. A *resource* could be a piece of equipment you rent or a meeting room that you have to pay an hourly fee to use. It could be a box of nails or a software program you have to buy.

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There are two kinds of resources: work resources and material resources. *Work resources* are charged by how many hours or days the resource (often human) works on a task. *Material resources*, such as sewing supplies or steel, are charged by a per-use cost or by unit of measurement (such as square yard or linear foot or ton).

Some resources, such as people, perform their work according to a working calendar. If a person works an 8-hour day, and you assign him to a task that takes 24 hours to complete, that person would have to put in three workdays to complete the task. Someone with a 12-hour workday would take only two days to complete the same task.

In addition, you can set working and nonworking days for your human resources, which accommodates variations such as four-day weeks or shift work.



You can set different rates for resources, such as a standard hourly rate and an overtime rate. Project applies the appropriate rate based on each resource's calendar and work assigned.

Several views in Project let you see information about resources and how their assignment to tasks has an impact on project costs. Figure 1-3 is the Resource sheet, which shows columns of information about resources and their costs.

Figure 1-3:
Resources
charged at
a rate per
hour are the
basis of
how Project
tallies costs.

	Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use
1	Corporate management	Work		C	Mgmt	100%	\$0.00/hr	\$0.00/hr	\$0.00
2	Project Office coord	Work		P		100%	\$25.00/hr	\$35.00/hr	\$0.00
3	Analyst	Work		A	Mktg	100%	\$75.00/hr	\$75.00/hr	\$0.00
4	Developer	Work		D		100%	\$80.00/hr	\$120.00/hr	\$0.00
5	Project Office staff	Work		P		100%	\$20.00/hr	\$30.00/hr	\$0.00
6	Steel	Material	STL	S			\$0.00		\$250.00
7	Trips to plant	Material	PLANT	T			\$0.00		\$0.00
8	Mohammed Durah	Work		M	Mgmt	100%	\$100.00/hr	\$100.00/hr	\$0.00
9	Penelope Marshall	Work		P	Eng.	100%	\$50.00/hr	\$75.00/hr	\$0.00

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One other important thing you should know about resources: They tend to have conflicts. No, I'm not talking about conference-room brawls (though there is that, too). These conflicts have to do with assigned resources that become overallocated for their available work time. If you assign one poor soul to three eight-hour tasks that must all happen on the same day, in the same eight hours, Project has features that do everything but jump up on your desk and turn on an alarm to warn you of the conflict. (Luckily, Project also provides tools that help you *resolve* those conflicts.)

You can also assign *fixed* costs to a task. For example, if your company charges a flat \$2,000 for a new product's package design, no matter how many resources work on it, you could enter a fixed cost of \$2,000 for the task of package design. (For more about resources and costs, see Chapter 7.)

Spreading the news

I am one of those people who need instant gratification. So one of the first things I ask about learning any new software product is, what's in it for me? Up to now, I've been telling you about the type of information you have to put into Project: information about tasks, task dependencies, and resources. But isn't it about time you got something back from Project? Of course it is.

You've finally reached one of the big payoffs for inputting all that information: reporting. After you've entered your information, Project offers a wealth of reporting options to help you view your project and communicate your progress to your project team, clients, and management.

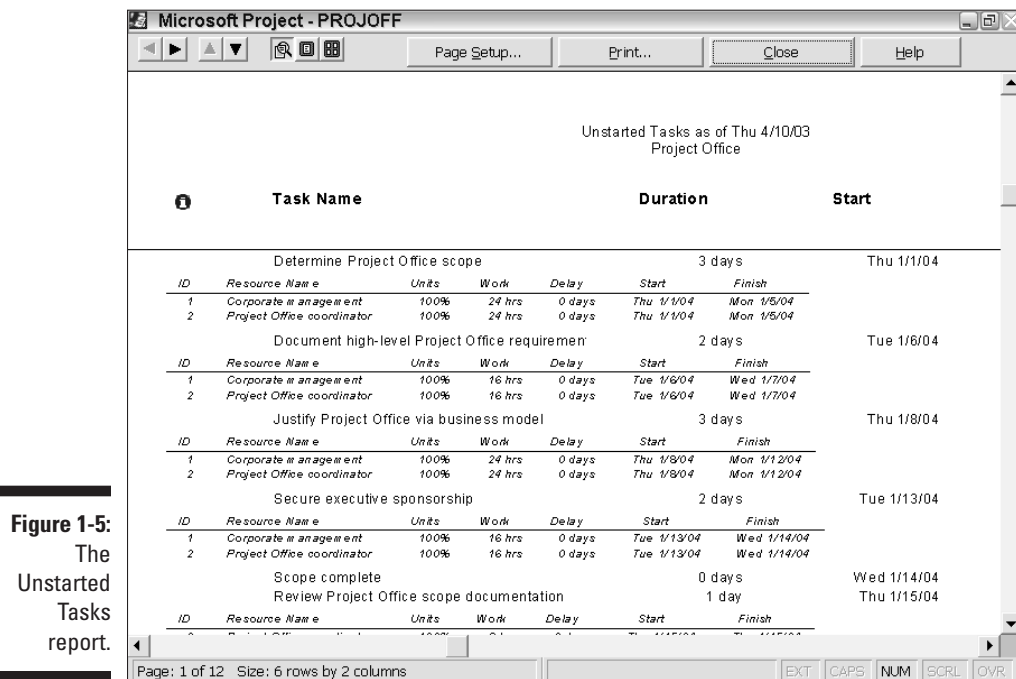
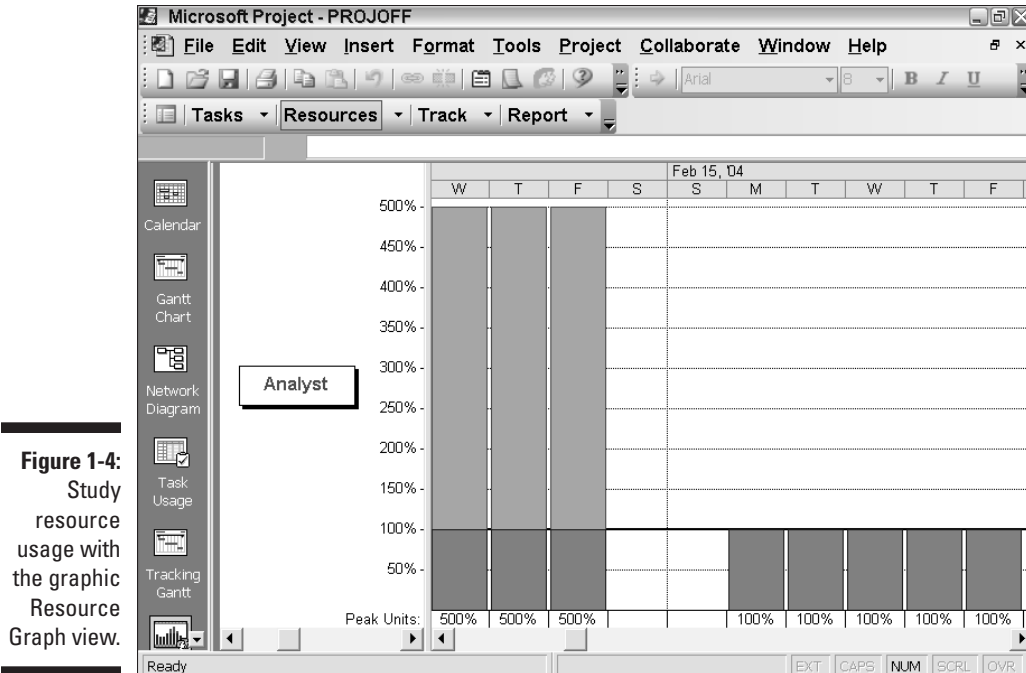
You can generate pre-designed reports based on information in your schedule, or simply print any of the views that you can display in Project. Figures 1-4 and 1-5 show you just two of the reporting options available in Project.

Planning to keep things on track

Projects aren't frozen in amber like some organizational mosquito: They go through more changes than a politician in a campaign year. That's where Project's capability to make changes to your project data comes in handy.

After you've built all your tasks, given them durations and dependencies, and assigned all your resources and costs, you set a baseline. A *baseline* is like a snapshot of your project at the moment you feel it's ready to go. After you set a baseline, you will record some activity on your tasks. Then you can compare that actual activity to your baseline.

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Tracking activity on your project involves recording the actual timing of tasks and recording the time that your resources have put in on those tasks, as well as any actual costs you've accrued. You can then display Project views that show you how far off you are at any point in time (compared to your baseline) in terms of the actual timing of tasks and cost of your project.

Whether you have good news or bad, you can use reports to show your boss how things are going compared to how you thought they would go. Then, after you peel your boss off the ceiling, you can use a lot more Project tools to make adjustments to get everything back on track.

The Role of the Project Manager

Although it's not always easy to understand the role (let alone the usefulness) of some managers, it's always easy to spot the value of a *project* manager. This is the person who creates the master plan for a project and tries to ensure it gets implemented successfully. Along the way, this key person will use some skills and methods that have evolved over time, always seeking to manage how things get done and generally keeping them on track.

What exactly does a project manager do?

A project manager isn't always the highest authority in a project; often that role belongs to whoever manages the project manager, up to and including members of senior management. The project manager is the person on the front lines, making sure the parts of the project come together and assuming hands-on responsibility for successes as well as failures.



In project-management parlance, the person who champions (and has the ultimate responsibility for) a project is called the project *sponsor*.

A project manager manages these essential pieces of a project:

- ✓ **The project plan.** This is what you create with Microsoft Project. It includes the estimated steps and associated timing and costs involved in reaching the project goal.
- ✓ **Resources.** Managing resources involves resolving resource conflicts and building consensus, as well as assigning resources and tracking their activities on the project. This part of the job also involves managing nonhuman resources such as materials or equipment.
- ✓ **Communicating with the project team, management, and customers.** Communicating the project's status to everyone who has a legitimate stake in its success is a key responsibility.

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Though a project manager may work for a project sponsor, there is often also a *customer* for whom the end product is being produced. That customer may be outside the project manager's own company, or within.

Understanding the dreaded triple constraint

You've seen the signs at the copy store or the auto repair place: You can have it fast, cheap, or right; pick two. That, my friend, is the triple constraint of project management in a nutshell.

In a project you have timing, resources (which are essentially costs), and quality of the product or service you end up with at the end of the project. Microsoft Project helps you manage the resources and timing of your project. The quality of your project is often affected directly by how well you manage them. If you add time, it costs more because resources are working longer hours at a certain wage. If you take away resources, it can affect quality . . . and so on.

Coming to a logical balance of time, money, and quality is at the core of what a good project manager does throughout the life of a project.

Tried-and-true methodologies

Microsoft Project incorporates some scheduling and tracking tools that have resulted from many years of developing project-management methods. A few of these are worth noting here:

The **Gantt Chart** (shown in Figure 1-6), which is the main view of Project, shows you a spreadsheet with columns of data along with a graphical representation of the tasks in the project arranged along a horizontal timeline. Using the data in the columns (such as task name, start date, finish date, and resources assigned to tasks), you can understand the parameters of each task, as well as see its timing in the graphical area. Being able to view all of this information on one page helps you understand what's happening in your project in terms of time and costs.

The **Network Diagram** view in Project, shown in Figure 1-7, is essentially Microsoft's version of something called a PERT chart. PERT (Program Evaluation and Review Technique) was developed during the construction of the Polaris submarine in the 1950s. It is a mostly graphical representation of the tasks in your project reflecting the flow of work in your project rather than the literal timing of tasks. This view helps you to see how one task flows into another, and to get a sense of where you are, not so much in time, but in terms of the work you have to accomplish.

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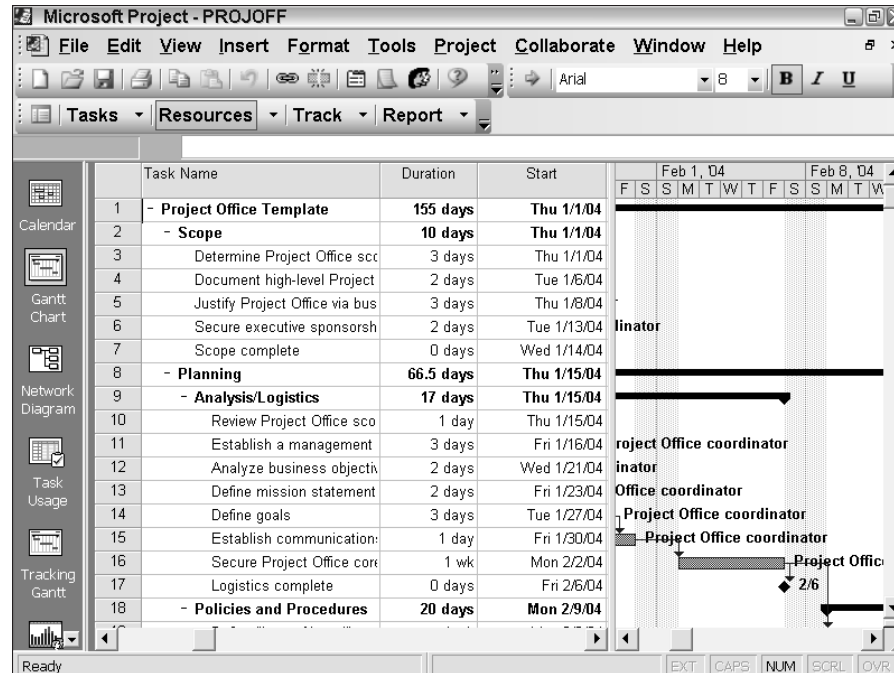


Figure 1-6:
The Gantt
Chart
method of
project
scheduling
as it
appears in
Microsoft
Project.

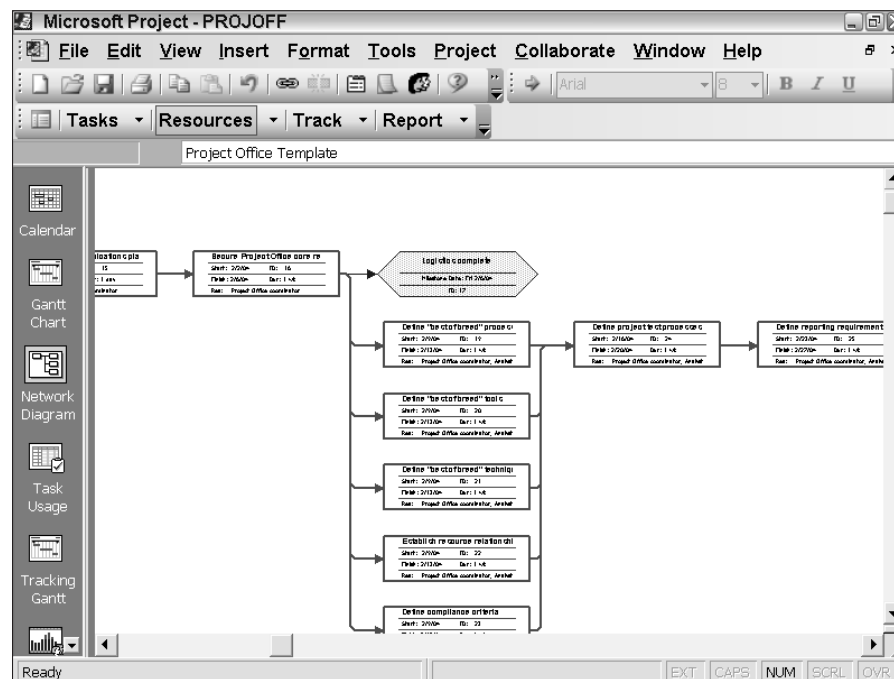


Figure 1-7:
A kissing
cousin to
the original
PERT chart,
the Network
Diagram
focuses on
work, not
time.

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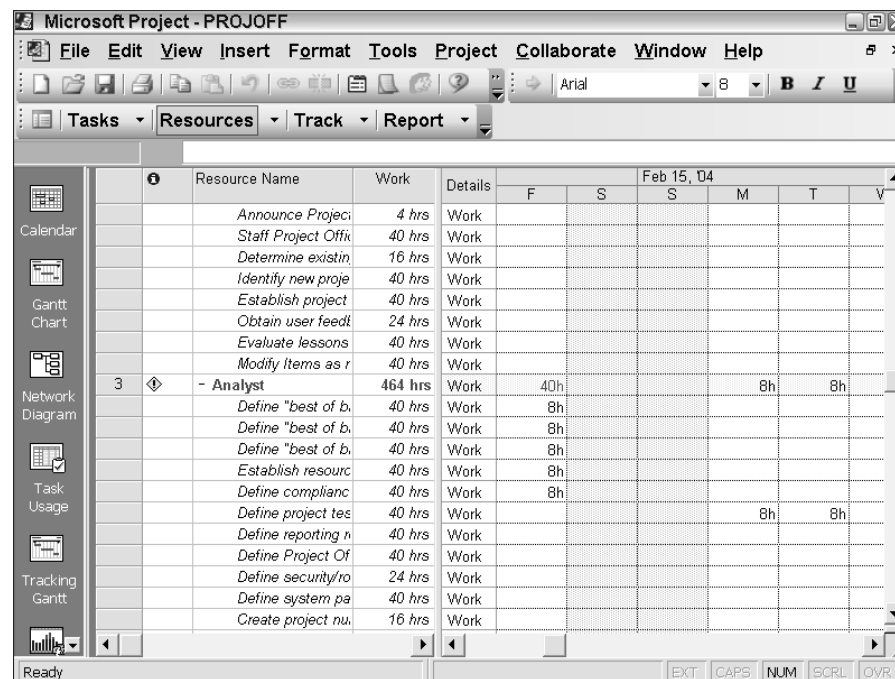
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Risk management is a central part of project management because, frankly, projects are chock-full of risk. There's the risk that your resources won't perform, the risk that materials will arrive late, the risk that your customer will change all the parameters of the project halfway through — well, you get the picture.

Risk management is the art of anticipating risks, ranking them from most to least likely, and determining strategies to prevent the most likely ones from occurring. Project helps you with risk management by allowing you to try out *what-if scenarios*: You can change the start date or length of a task or phase of tasks (for example) and see just what that does to your schedule, such as the delays, cost overruns, and resource conflicts that might occur in such a scenario, down to the last hour and penny. Having this kind of information at your fingertips makes risk management easier and (almost) painless.

Finally, **resource management** consists of using resources wisely. A good project manager will find the right resource for the job, assign that person a reasonable workload, stay alert for shifts in schedule that cause that resource to be overbooked, and make adjustments during the life of the project that keep all resources most productive. In Project, tools are available such as a resource histogram or the *resource usage chart*, reflecting resource workload, as shown in Figure 1-8.

Figure 1-8:
A resource
usage chart
helps you
spot
resource-
scheduling
problems;
notice
how over-
booked this
resource is
on this date.



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The figure also shows *resource leveling* (a calculation that automatically reschedules resources to resolve overbooking), which can enable you to manage resources much more effectively.



You can even use codes for resources that designate skill level or abilities so that finding the right resource for each job is as simple as performing a search.

From To-Do List to Hard Drive

By now you're probably shaking your head and saying, "Boy, handwritten to-do lists look pretty good right now. Beats creating hundreds of tasks, assigning them durations, establishing dependencies among them, creating resources, entering resource calendar and rate information, assigning resources and costs to tasks, entering activity performed on tasks . . ." and so on.

Well, you're right *and* wrong about that. You do have to enter a lot into Project to get the benefit of its features. But you can also get a lot out of Project.

Getting up to speed with Project

Take a moment to review some of the wonderful things Project can do for you. This is why you (or your company) bought it and why you're investing the time to read this book.

With Project, you'll enjoy the following benefits:

- ✓ Project automatically calculates costs and timing for you based on your input. You can quickly recalculate what-if scenarios to solve resource conflicts, get your costs within budget, or meet your final deadline.
- ✓ Project offers views and reports that make a wealth of information available to you and those you report to with the click of a button. No more running up a report on total-costs-to-date to meet a last-minute request from your boss. If she wants to know total-costs-to-date, you can just print your Tracking Gantt view with the Tracking table displayed.
- ✓ You can use built-in templates to get a head start on your project. Templates are prebuilt plans for typical business projects such as commercial construction, engineering projects, a new product rollout, software development, and an office move.
- ✓ It's likely that you do similar types of projects all the time. After you create one project, use it as a template for future projects.

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- ✓ You can create resources for your project according to information you've already created in your Outlook address book. You can even create one set of company resources, and give every project manager in the company access to them.
- ✓ A number of tools in Project employ complex algorithms (that you couldn't even begin to figure out) to do things such as leveling resource assignments to solve resource conflicts, filtering tasks by various criteria, modeling what-if scenarios, and calculating the value of work performed to-date in dollars.

Here's where the Internet comes in

You can also take advantage of all the Internet has to offer by using Project features to collaborate with others. Project allows you to request updates on a task's progress from team members by using e-mail. You can even publish your project on the Web.

The Professional version of Project includes a feature called Project Server that enhances workgroup collaboration. You can take advantage of an online project center with areas for discussions, tracking progress, exchanging data, and more.



Part V of this book looks at how to take advantage of the enterprise-wide features of Project Server and SharePoint.

Getting Started

As Shakespeare said, "In delay there lies no plenty." I don't know about you, but I need all the plenty I can get, so it's time to jump in and start using Project.

You have a few choices here. You can use a template to create a project or build one from scratch. In either case, you start by telling Project something about your project.

First, enter some project information

When you open Project 2003, you see a blank project file show up on-screen along with the Getting Started task pane (which includes links to open an existing project or create a new project).

What's Project Guide?

Project Guide is like some of those wizards you see in Microsoft products — it walks you through a series of steps, asking you to enter some information and automating a process for you. However, in many ways Project Guide is like no wizard you've ever seen.

First, it has four different sections (Tasks, Resources, Track, and Report). Within each of those categories may be ten or so links for you to click to initiate an action. When you do so, there may be a variety of sub-actions you can choose (depending on your particular project). Also, the sections of Project Guide span the entire life of your project, from the time you first enter task information to the time you generate your final report.

If you've never used project-management software (or Project itself), it can be very helpful to run through Project Guide to set up your first schedule, enter resources, track activities on tasks, or generate reports. However, in order to know how to work through Project Guide and make intelligent choices, you'll have to have some basic understanding of how a project is built. My advice is to walk through many of these steps with me in this book, and *then* use Project Guide to practice building your first project. Then you can see whether its structure works the way your mind works — or not.



If you click Create a New Project in the Getting Started task pane, it changes to the New Project task pane. Here you can click Blank Project, and the task pane changes to the Tasks pane — the first of four phases of a feature called Project Guide. You can use Project Guide to walk you through the logical sequence of steps for creating a new project.

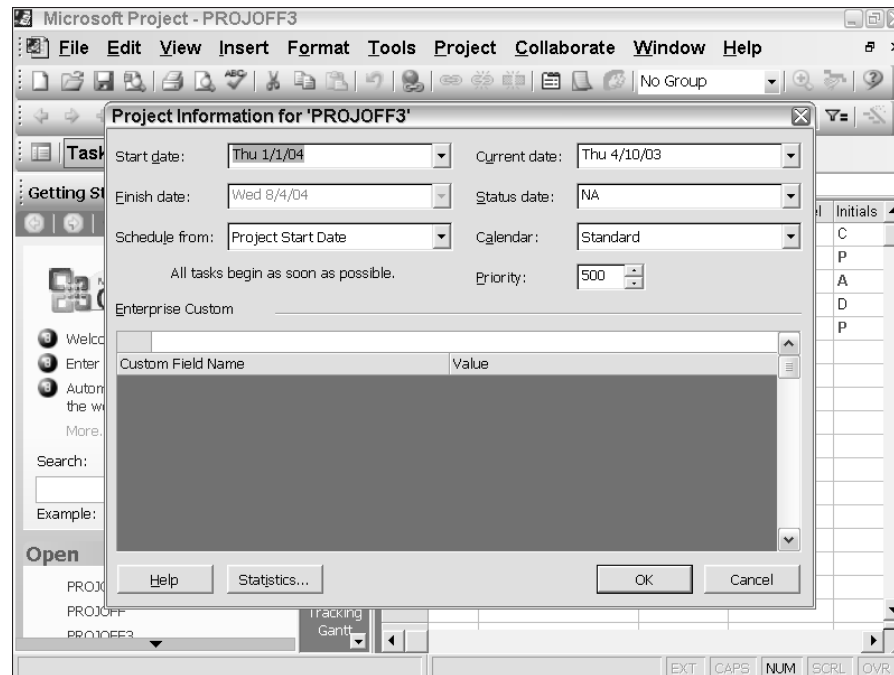
With the blank project open, a first logical step would be to input some general project information. To do so, you choose Project ⇄ Project Information. The Project Information dialog box appears, as shown in Figure 1-9.

Here's what you can do in this dialog box:

- ✔ **Set the start date for the project.** If you're not sure when it will start, set the start date about a month or so ahead. Then, when you've built some tasks and have a better handle on the entire length of your project, you can come back here and set a new start date. Project will automatically recalculate all dates when you do.
- ✔ **Set the finish date for the project.** Especially if you have a *drop-dead date* (now *there's* an attention-getting term!) beyond which the project cannot wander and still reach completion, you can set the finish date. In such a case, be sure to look at the *next* setting in this list — and change it accordingly.

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Figure 1-9:
The Project
Information
dialog box is
used for
some basic
project
settings.



- ✓ **Schedule from the start or finish of the project.** Most projects go from the start forward. However, if you have an absolute drop-dead date for the end of your project (for example, if you're organizing an event that will occur on New Year's Day next year), you might want to set the finish date and then work backward to fit all your tasks into the time allotted. If you change this setting to Project Finish Date, the Finish Date box becomes available.
- ✓ **Set the current date.** You may fill in the current date according to your computer calendar, but you can choose another date if you like.
- ✓ **Set a status date.** You use a *status date* when you're tracking the progress of your project at regular intervals. If you set a status date, your computer assumes that any activity you record in your project is being tracked as of this date. You can find out more about this feature in Chapters 12, 13, and 14.
- ✓ **Set the working calendar for your project.** You have three choices: Standard, Night Shift, and 24 Hours. Base your choice on the working habits of your organization. For example, if your company uses resources in three shifts a day — a total 24 hours of straight working time — and all those shifts would put in work on your project, then choose 24 Hours. If you use a day shift and a night shift, choose Standard. (Most projects use a standard calendar with a typical eight-hour workday.)

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Calendars can get a little confusing. A project calendar that you set in this dialog box indicates what the usual workday is like in your company, but you can also set up individual calendars for each resource you create. This helps you accommodate both shift workers and nine-to-fivers in the same schedule. See Chapter 3 for more about resource calendars.

- ✓ **Assign a priority to your project.** Doing so can be especially useful if (for example) you're using the same resources across several projects. With priorities set on all projects, Project tools can automatically reallocate resources according to your set priorities.



You can also create custom project information fields for your organization in the Enterprise Custom section of this dialog box. For example, you might want a field that explains which department in the company is running the project.

If you click the Statistics button in this dialog box, you get an overview of your project, as shown in Figure 1-10.

Starting from scratch

When you make settings in the Project Information dialog box and click OK, you are faced with a blank Project schedule, as shown in Figure 1-11. As a writer, I can tell you that nothing is as daunting — or inspiring — as facing a blank page. It's the canvas on which you create your Project plan.

What you're presented with is the Gantt Chart view. You can discover more about various views in Chapter 2. For now, note the following:

- ✓ The bar of icons along the left, called the *View Bar*, allows you to click and go to different views.
- ✓ To the right is a task pane currently displaying the *Project Guide*, an informational area with step-by-step guidance on how to build your project.
- ✓ In the middle of the view is the *sheet* section. This is a spreadsheet interface that you can use to enter, edit, and view information about your project.
- ✓ Finally, the *chart* area reflects your task information graphically after you begin to add tasks. *Taskbars* in this area indicate the duration and timing of tasks, as well as the progress you record on them. The indications of time increments across the top of the chart area, called the *timescale*, help you interpret the timing of each taskbar and can be adjusted to show your project in larger or smaller increments of time.

10/1/2010

Microsoft Project - Project1

File Edit View Insert Format Tools Project Collaborate Window Help

Task Resources Track Report

Calendar

Gantt Chart

Network Diagram

Task Usage

Tracking Gantt

Ready

Tasks

Task Name

Duration

03

Apr 13, 03

T W T F S S M T W

Plan and schedule your project's tasks by clicking an item below. Clicking an item displays tools and instructions for completing that step.

Define the project

Define general working times

List the tasks in the project

Organize tasks into phases

Schedule tasks

Link to or attach more task information

Add columns of custom information

Set deadlines and

Figure 1-12: The various tabs in this dialog box hold a wealth of information about a single task in your project.

Task Information

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name: Document high-level Project Office req. Duration: 2d ☐ Estimated

Percent complete: 0% Priority: 500

Dates

Start: Tue 1/6/04 End: Wed 1/7/04

☐ Hide task bar

☐ Roll up Gantt bar to summary

Help OK Cancel

Using templates

Reinventing the wheel has never been one of my favorite sports, so I'm grateful that Microsoft has provided some convenient project templates. These include projects by type, for example an engineering project or an office move. Templates already have many tasks appropriate to the task type created for you.



After opening a template be sure to check its Project Information (choose Project ⇨ Project Information) to make sure that the Start Date and Calendar options are set as you want.

Figure 1-13 shows the Project Office template. Templates typically contain sample tasks broken into logical phases, with task durations and dependencies in place. The templates from Microsoft often include resources, but you can create your own resources as well as use, edit, or delete the ones provided.

You can open a template from the New Project task pane. To do so, follow these steps:

- 1. Choose File ⇨ New.**

The New Project task pane appears, as shown in Figure 1-14.

- 2. Select On My Computer.**

You can also use the On My Web Sites or Templates Home Page template to access online templates.

- 3. Click the Project Templates tab, which is shown in Figure 1-15.**

Figure 1-13:
Templates
provide a
great head
start in
building
common
business
projects.

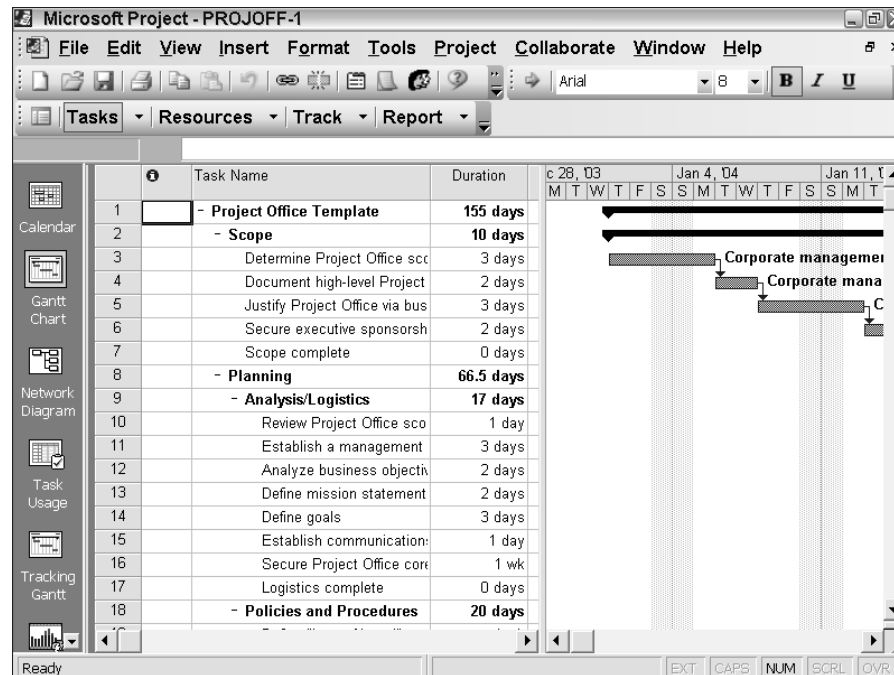


Figure 1-14:
Here's the
New Project
task pane.

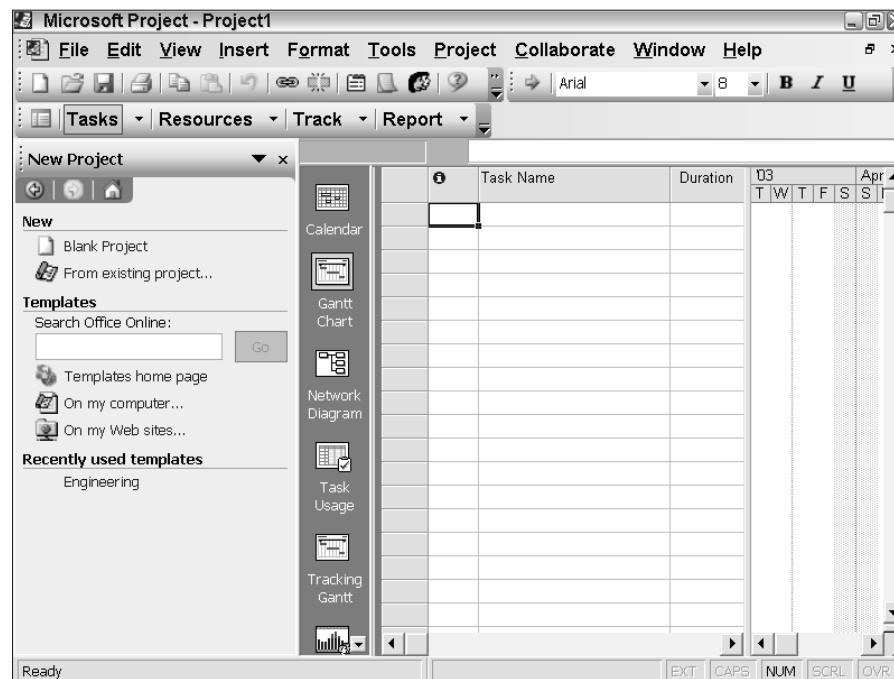
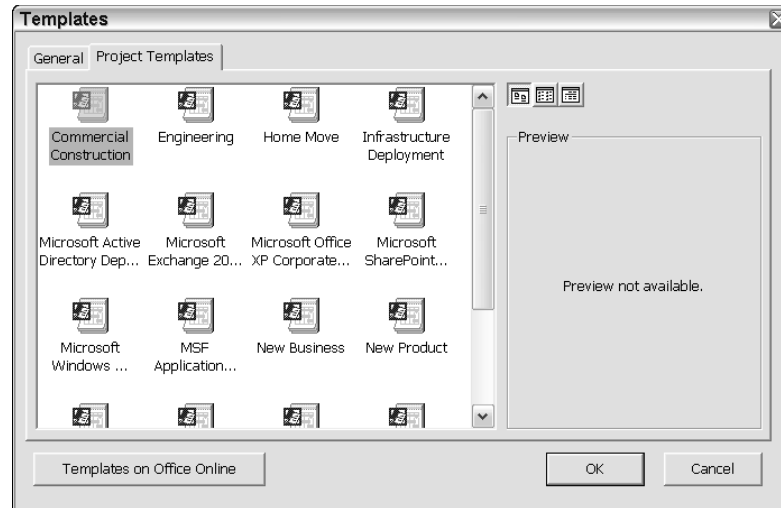


Figure 1-15:
Business
and
personal
templates,
such as
Home
Move, are
included
here.



4. Click a template to display a preview.

5. When you find the template you want to use, click OK.

The template opens in Project document format (.MPP). You can then delete tasks, move them around, or add tasks as necessary for your project.



If you modify a template and think that you might use that set of tasks again for future projects, consider saving the file as a custom template before you begin to add specific project details. Just choose File ⇨ Save As, and then select Template in the Save As Type list.

Saving a project for posterity

Saving Project files works just as saving does in most other software you've used. Here's a reminder.

To save a Project file that you haven't saved before, follow these steps:

- 1. Choose File ⇨ Save As.**
- 2. Use the Save In list to locate the folder where you want to save the file, and then click to select it.**
- 3. In the File Name text box, type a name for the project.**
- 4. Click Save.**



It's a good idea to create a folder for your project where you save not only your Project files but also supporting documents, e-mails, and so on for your project. You can create a new folder from the Save As dialog box by clicking the Create New Folder button.

Getting help from Project

If you can get to work without mishap and turn a computer on, you probably know how to use a help system in software, too. But Table 1-1 offers a run-down of the type of help you'll find in Project 2003.

Table 1-1 Project Help Features	
<i>Help Option</i>	<i>How to Use It</i>
Microsoft Project Help	Depending on whether you've activated the Office Assistant, this option displays the Assistant or opens the full Help feature with contents, the Answer Wizard, and topics listed in an index, along with the What's New listing of Project features.
Show the Office Assistant	Displays the annoying little icon that asks you to enter your question in a natural-language style (that is, a sentence) and offers topics to try to address your questions.
Contents and Index	Displays the same thing as Microsoft Project Help. Go figure.
Reference	Provides reference information such as a comprehensive list of all fields in Project, a glossary, and a table of mouse and keyboard shortcuts.
Getting Started	A side menu for this Help menu option offers a tutorial and project map. The tutorial provides a set of topics explaining Project from the basics of what is project management through creating a plan. The project map is another take on the phases involved in building your project.
Office on the Web	Because Project is part of the Office family of products, this link is provided to the Office online Assistance Center.

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<i>Help Option</i>	<i>How to Use It</i>
Detect and Repair	Automatically identifies errors and tries to correct them. Use this if you have serious problems using the software (for example, if the software constantly shuts down and gives you error messages).
Project Guide	The one option not accessed from the Help menu, Project Guide is new in 2003. Project Guide appears when you open a new project. It offers links to step-by-step information on how to build your project.

As you can see, it could take you a year just to learn all the help options in Project. Don't worry — they're there when you need them, and some, such as Project Guide, even pop up automatically to offer help.

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Part I: Setting the Stage for Project