# Formatting and Sharing Your Plan

#### Customize a Gantt Chart view

In this exercise, you change the formatting of the Gantt chart view.

On the **File** tab, click **Save As**.

Project displays the Save As dialog box.

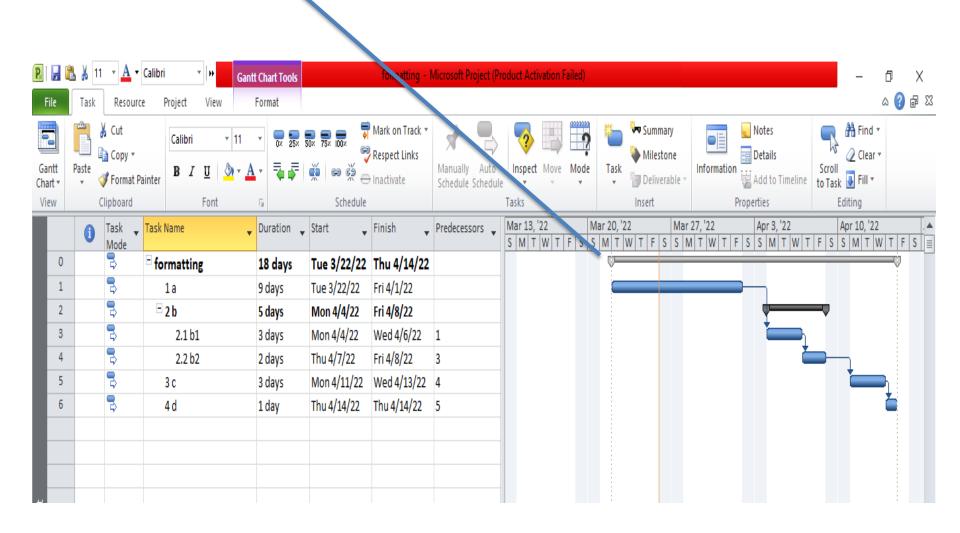
2. In the File name box, type Simple Formatting, and then click Save.

To begin, you will display the project summary task to see the top-level or rolled-up details of the project. Project automatically generates the project summary task but doesn't display it by default.

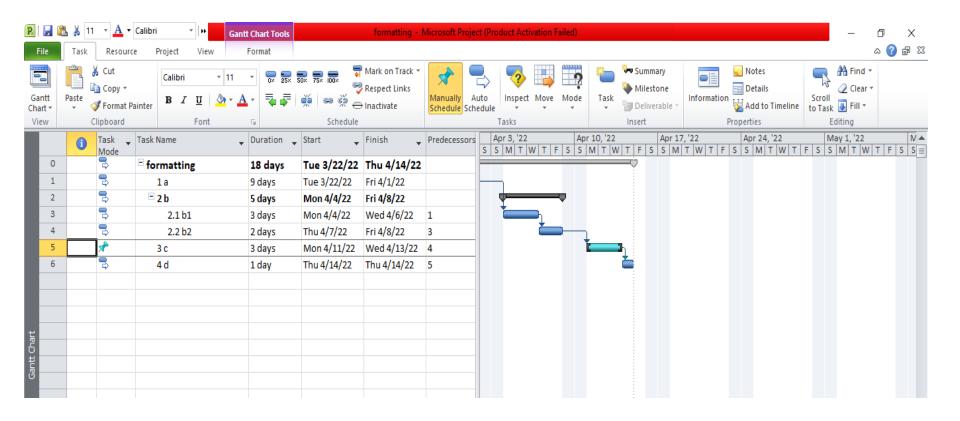
**3.** On the **Format** tab, in the **Show/Hide** group, click **Project Summary Task**. Project displays the project summary task at the top of the Gantt Chart view.

 On the Format tab, in the Show/Hide group, click Project Summary Task.

Project displays the project summary task at the top of the Gantt Chart view.

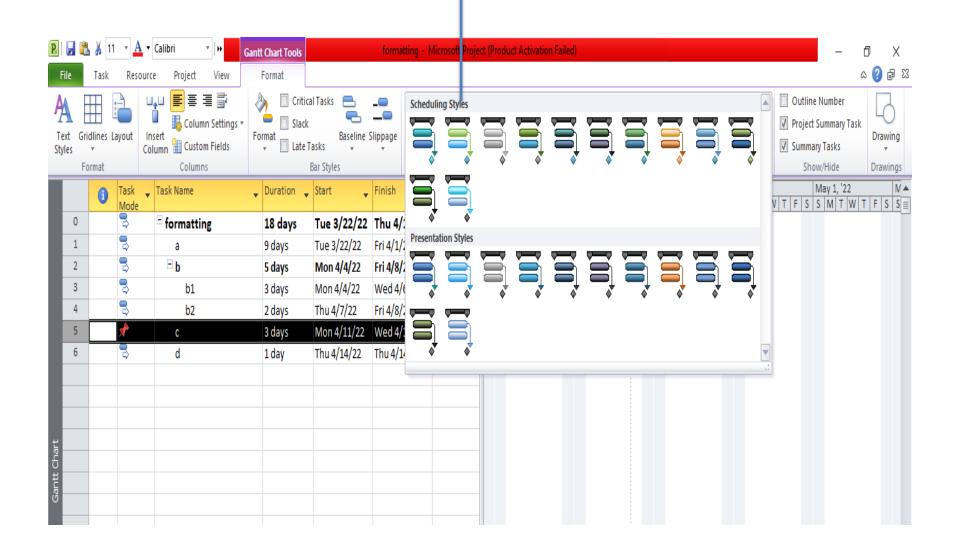


- The project summary task, which is always numbered as task 0, contains top-level information such as duration, work, and costs for the entire project. The name of the project summary task comes from the file name as the project summary task's name.
- **4.** In the **Task Name** column, click the name of task (manually scheduled).
- 5. On the Task tab, in the Editing group, click Scroll to Task.
- **Tip** You can accomplish the same thing by right-clicking the task name and in the shortcut menu that appears, clicking Scroll To Task.
- Project scrolls the chart portion of the Gantt Chart view to display the Gantt bar for a manually scheduled task.

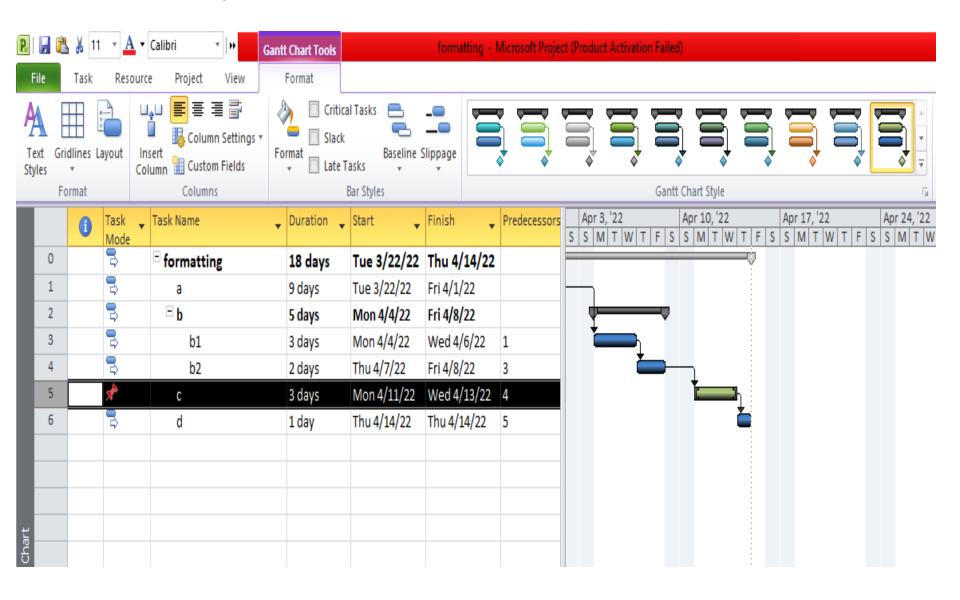


**6.** On the **Format** tab, in the **Gantt Chart Style** group, click **More** to display the predefined color styles.

The formatting options under Scheduling Styles distinguish between manual and automatically scheduled tasks, but the Presentation Styles do not.

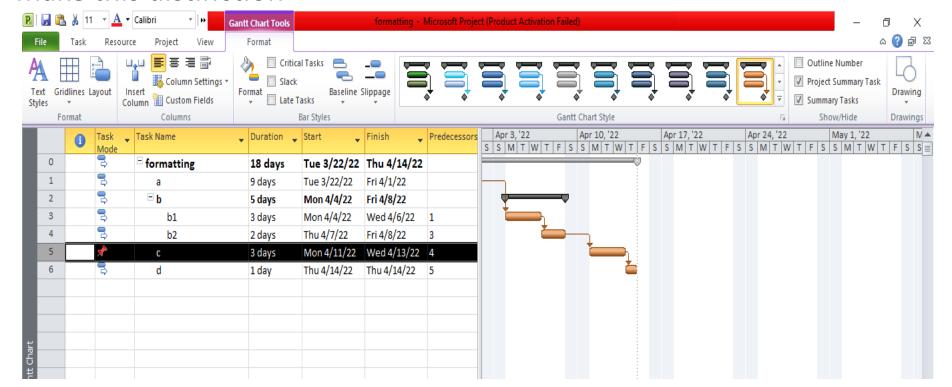


## Scheduling Styles distinguish between manually and automatically scheduled tasks.



- O Presentation Styles do not.
- 7. Under Presentation Styles, click the orange color scheme.
- Project applies this style to the Gantt bars in the project plan.
- Applying a presentation style to the Gantt Chart view is an option that you can use when you don't want to distinguish between manual and automatically scheduled tasks—when showing the Gantt chart to an audience for whom you do not want to

#### make this distinction



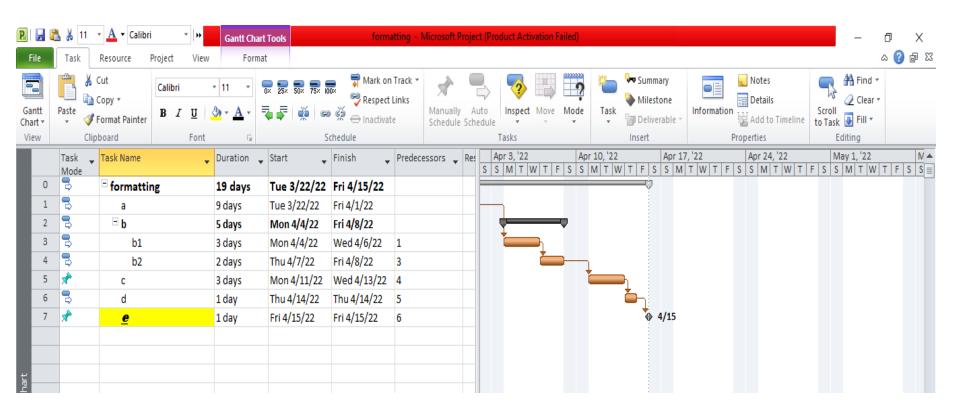
your next step in this exercise is to **reformat a task name** so it will visually stand out.

#### to highlight the task name of milestone

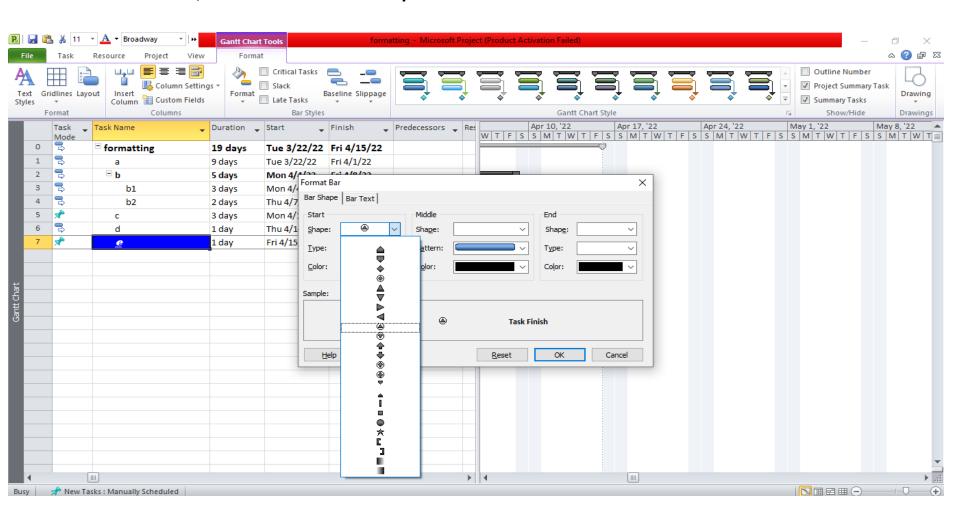
You can also click the **Task tab**, and in the **Font group**, click **background Color.** 

Project applies the yellow background color to the task name's cell.

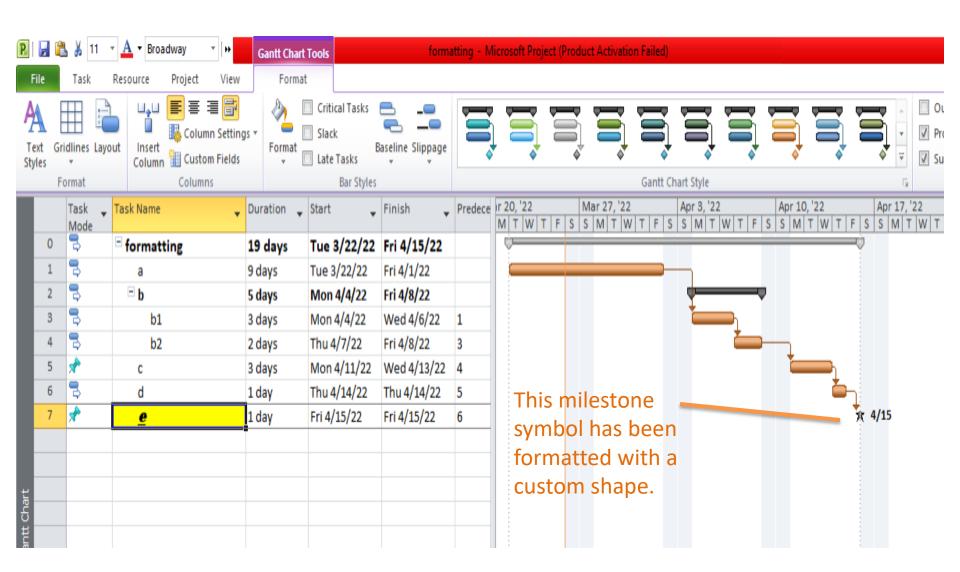
. Right-click the task name again, and on the mini-toolbar, click the **Italic** button.



- **11.** On the **Format** tab, in the **Bar Styles** group, click **Format** and then click **Bar**.
- **12.** In the **Format Bar** dialog box, under **Start**, click the **Shape** drop-down list. Project displays the symbols you can use as a Gantt bar edge, or, in this case for a milestone, as a milestone symbol.



# **13.** Click the star symbol, and then click **OK**. Project uses the star symbol as the milestone symbol for this task.

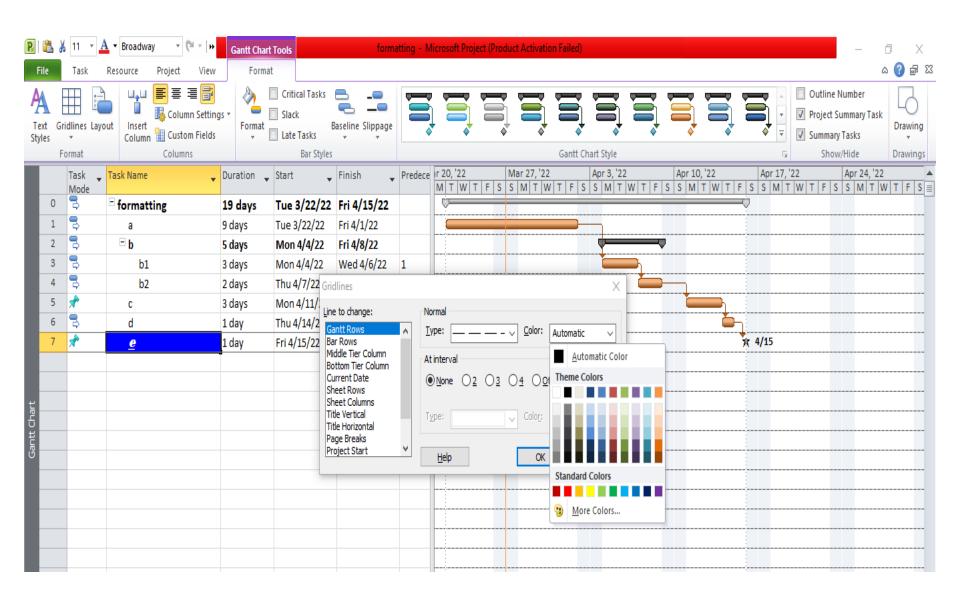


#### add horizontal gridlines

To conclude this exercise, you will add horizontal gridlines to the chart portion of the Gantt Chart view so you can more easily associate Gantt bars with their tasks.

- **14**. On the **Format** tab, in the **Format** group, click **Gridlines**, and then click **Gridlines**.
- **15.** Under **Lines to change**, leave Gantt Rows selected, and in the **Type** box under **Normal**, select the small dashed line (the third option down), and then click **OK**. Project draws dashed lines across the chart portion of the Gantt Chart view.

## add horizontal gridlines



The Timeline view is best suited to display some tasks from the Gantt Chart view in a less complicated format.

The Timeline view is especially well suited for conveying quick summaries of project plans, as you will see in this exercise. Later in this chapter, you will also copy a Timeline view to another application as a quick "project at a glance" image.

In this exercise, you customize the Timeline view and adjust some display details on the Timeline.

In this exercise, you customize the Timeline view and adjust some display details on the Timeline.

#### 1. display timeline: view>>split view>>timeline

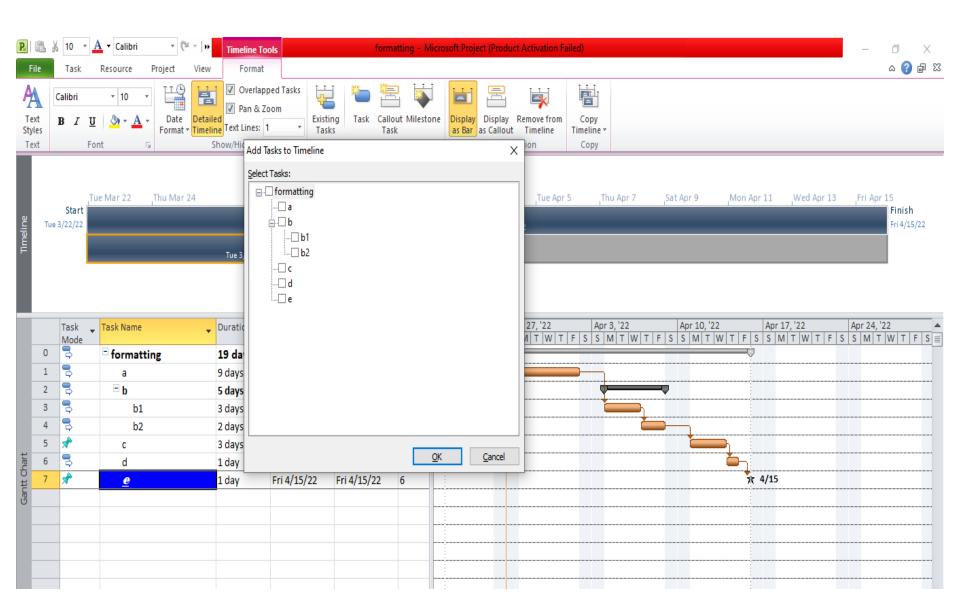
Click anywhere in the Timeline view.

Project shifts focus to the Timeline view, and displays the Timeline Tools on the Format tab.

2. On the Format tab, in the Insert group, click Existing Tasks.

The Add Tasks to Timeline dialog box appears.

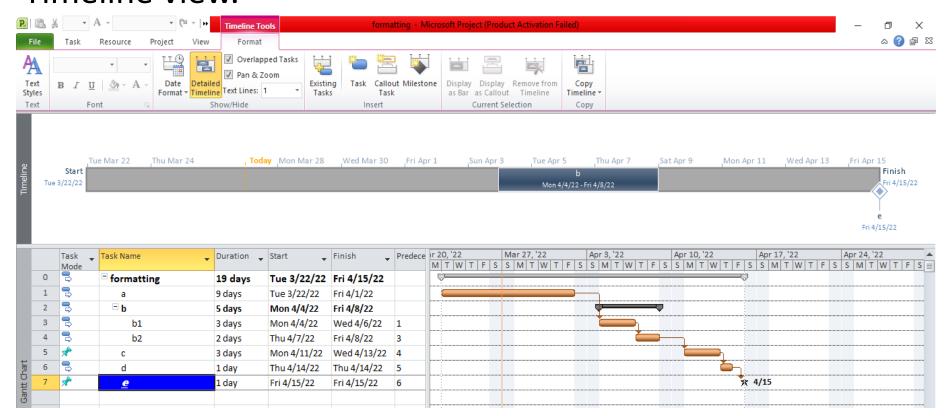
This dialog box contains an outline of the summary and subtasks in the project plan.



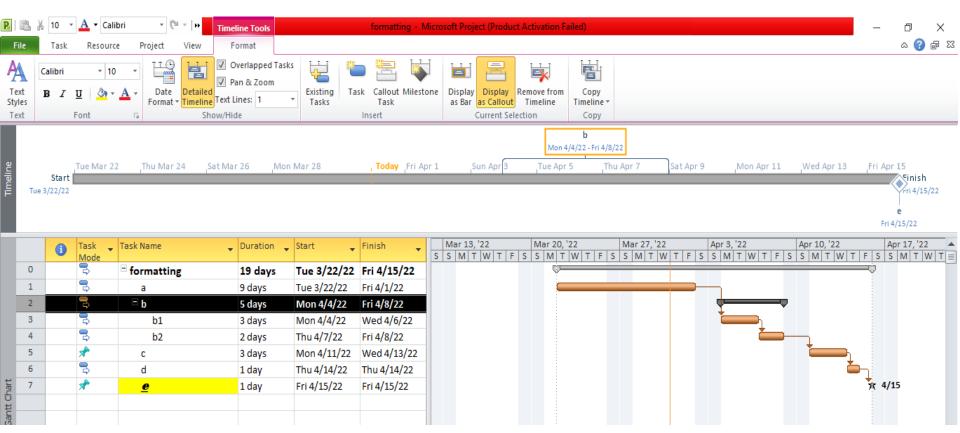
Select tasks :summary tasks and a milestone task that you will add to the Timeline view.

#### 4. Click OK.

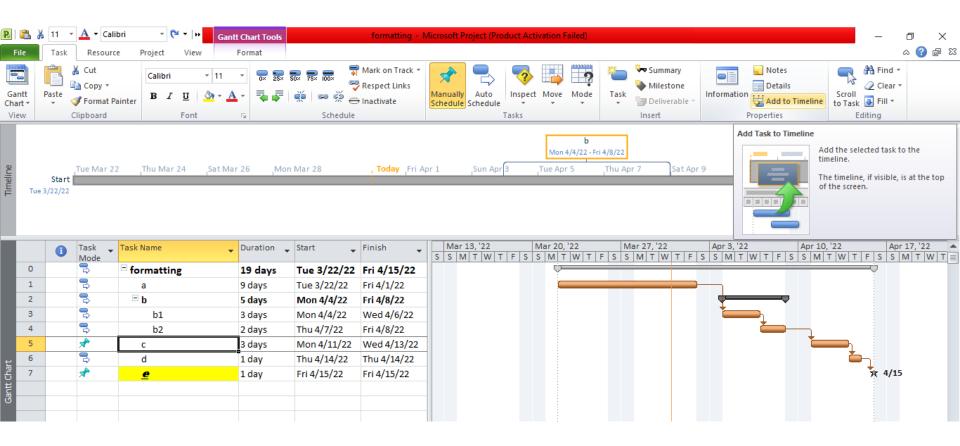
Project adds the summary tasks and milestone to the Timeline view.



- **5.** In the **Timeline** view, click the bar for the summary task.
- 6. On the Format tab, in the Current Selection group, click Display as Callout.
- Project displays this summary task as a callout, which for this task has the advantage of making the full task name visible.

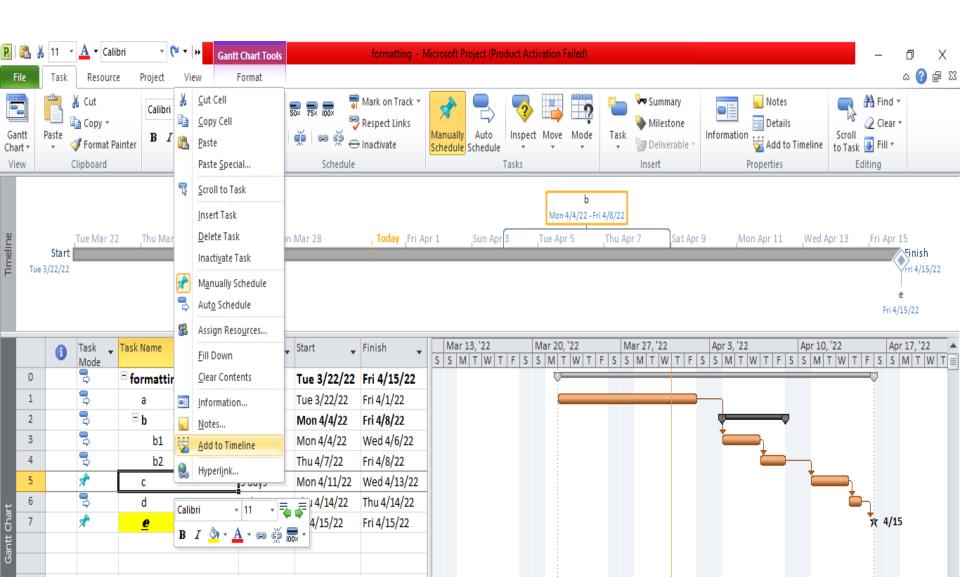


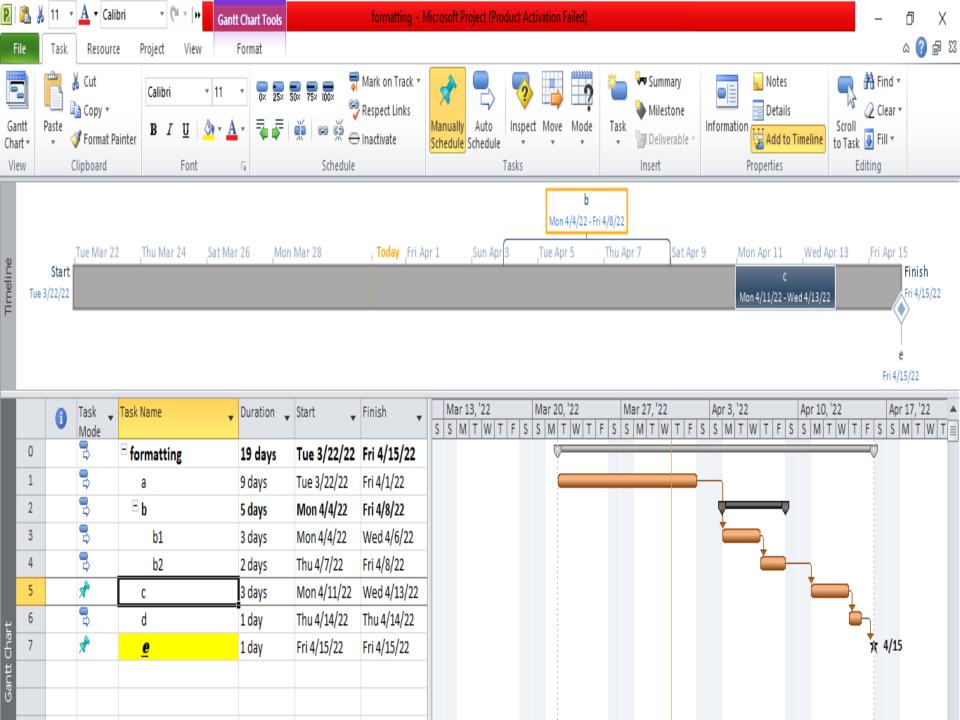
- Next you'll add a task to the Timeline, but you'll use a different technique:
- 7. In the Task Name column, click the name of task.
- **8.** On the **Task** tab, in the **Properties** group, click **Add to Timeline**.



**Tip:** You can also right-click the task name and click Add to Timeline in the shortcut menu that appears.

Project adds this milestone task to the Timeline view.

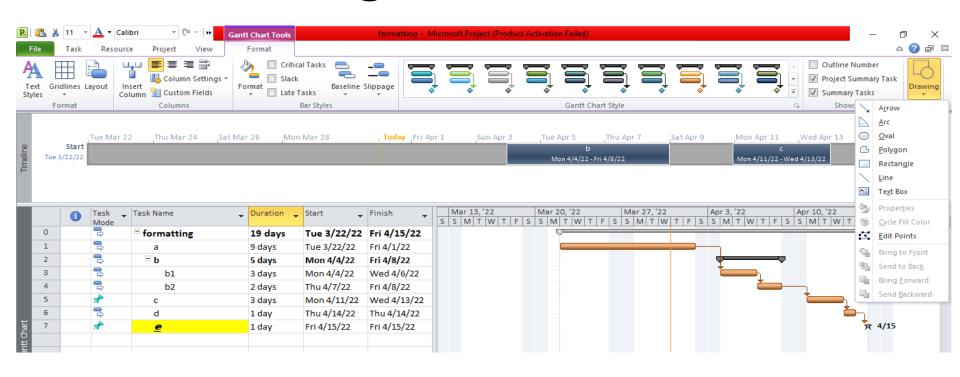


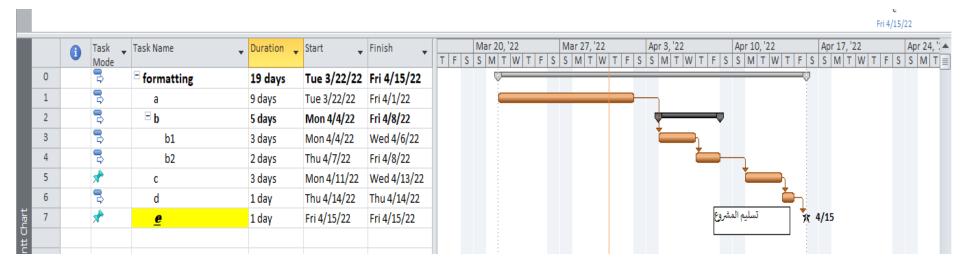


Project includes a Drawing tool with which you can draw objects directly on the chart portion of a Gantt chart. For example, if you would like to note a particular event or graphically call out a specific item, you can draw objects, such as text boxes, arrows, and other items, directly on a Gantt chart.

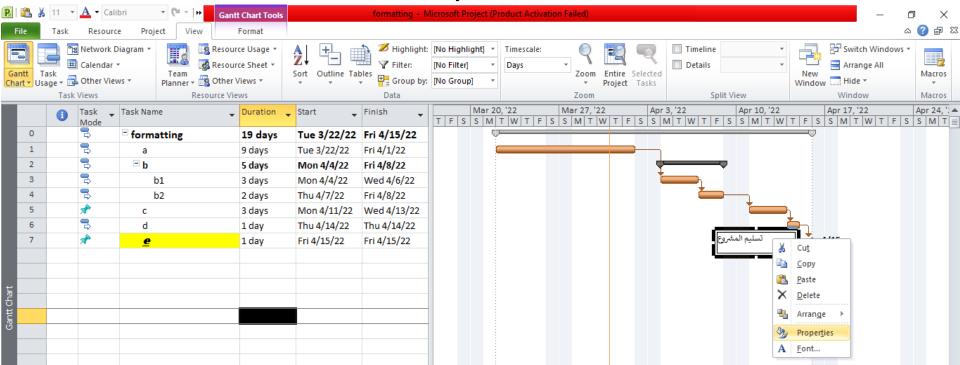
In this exercise, you add a text box to the Gantt Chart view:

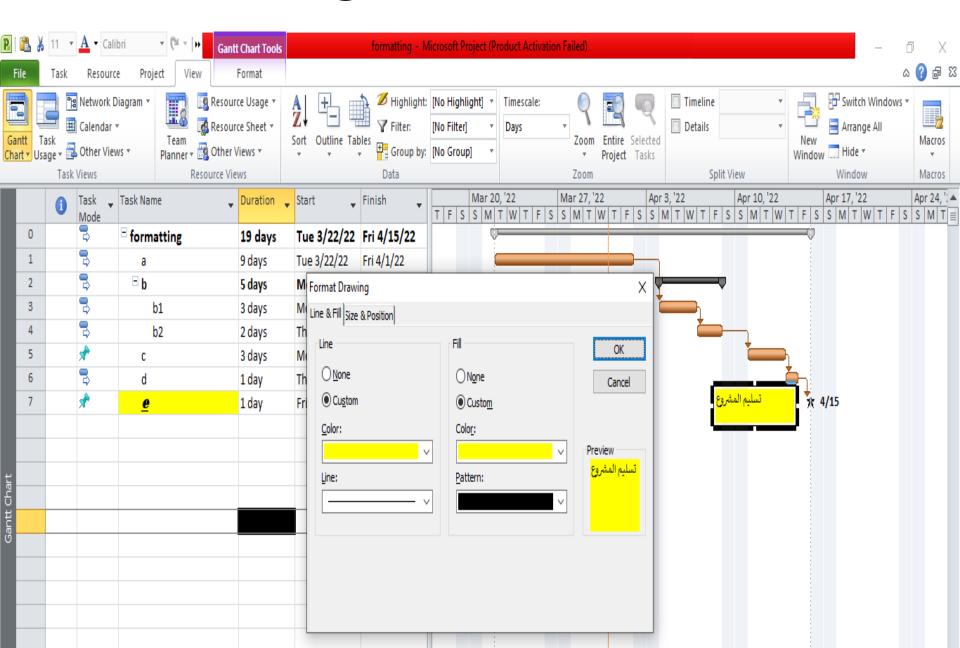
- 1. Scroll the Gantt Chart view to the top of the table so task 0 is visible.
- **2.** On the **Format** tab, in the **Drawings** group, click **Drawing**. The menu of drawing objects appears. This includes all the built-in shapes that you can draw, plus other commands for formatting shapes.





- **5.** On the **Format** tab, in the **Drawings** group, click **Drawing**, and then click **Properties**.
- The Format Drawing dialog box appears.
- **Tip** You can also double-click the border of the text box to view its properties.
- **6.** Make sure the **Line & Fill** tab is displayed, and in the **Color** box under the **Fill** label, click yellow.

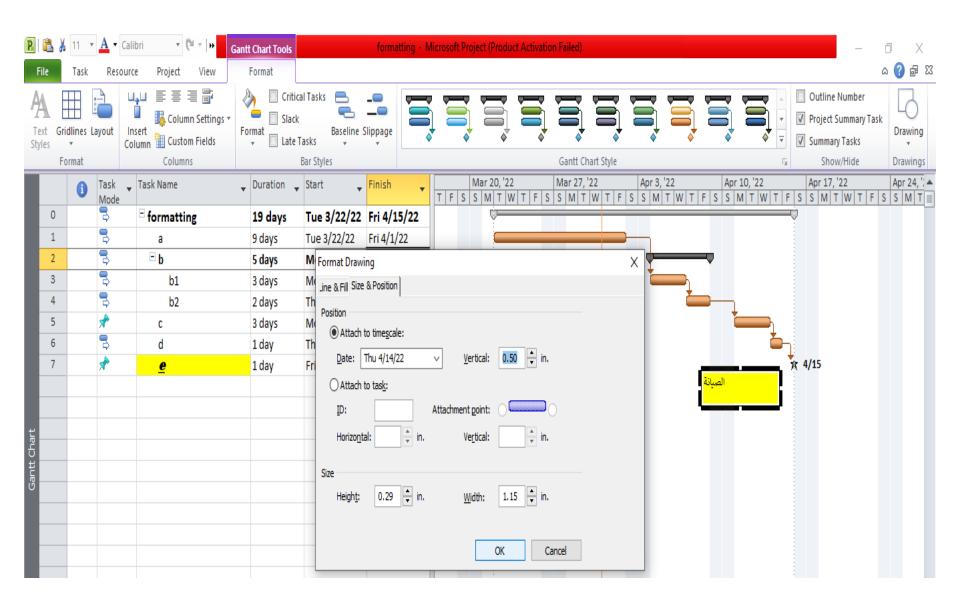




Next, you'll attach the text box to a specific date on the timescale.

- 7. Click the Size & Position tab.
- **8.** Make sure that **Attach To Timescale** is selected, and in the **Date** box, type or click **the date you want**.
- **9.** In the **Vertical** box under **Attach To Timescale**, type **.5** (this is the number of inches below the timescale where the top of the box will be positioned),
- and then click **OK** to close the **Format Drawing** dialog box.

Project colors the text box yellow and positions it below the timescale near the date you specified.



You may frequently need to share details of your project plans with colleagues who do not have Project, or who may prefer a simple schedule snapshot.

In addition to the reports feature described later in this chapter, you can quickly copy or print views from Project. Copied views can then be pasted into e-mail messages, documents, presentations, and other elements.

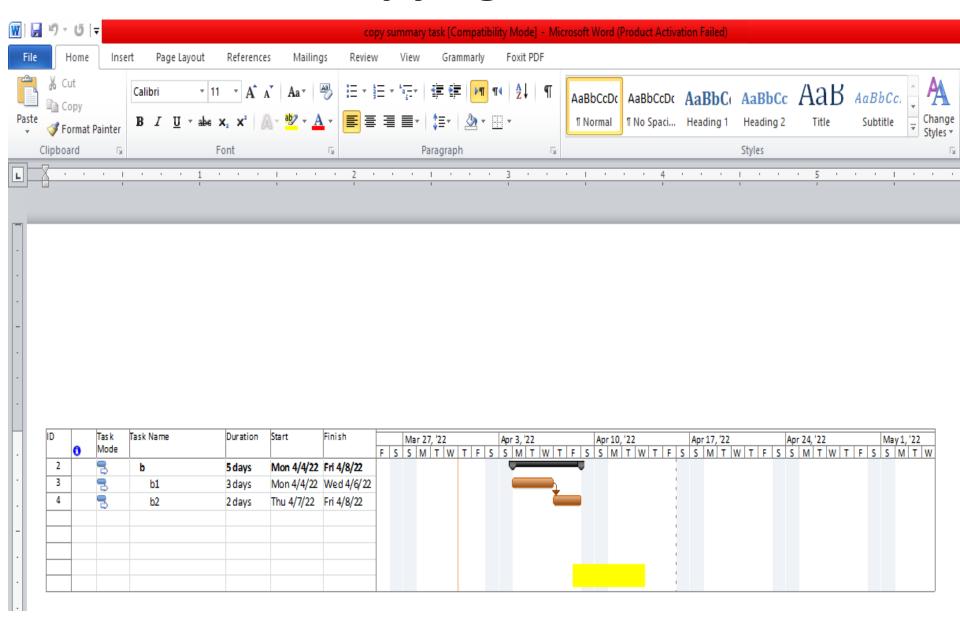
Both the Gantt Chart and Timeline views are well suited for sharing schedule details the Timeline is a concise "project at a glance" view and the Gantt Chart is a widely used format of schedules.

In this exercise, you copy the Gantt Chart and the Timeline views to another application.

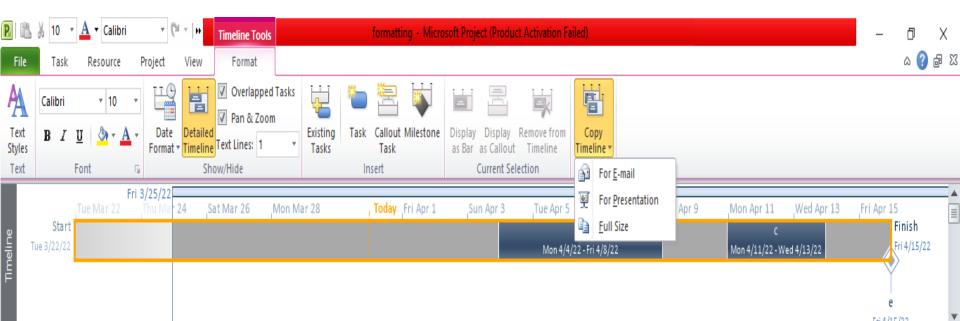
- 1. In the Task Name column, click the name of task you want.
- 2. On the Task tab, in the Editing group, click Scroll to Task.
- The Gantt bars for that summary task and its subtasks are displayed.
- This is close to the image you'd like to copy.
- 3. In the Gantt Chart view, select the names of task and its subtasks of it.
- **4.** On the **Task** tab, in the **Clipboard** group, click the arrow next to **Copy**, and then click **Copy Picture**.

The Copy Picture dialog box appears.

- you to save the copied image as a Graphics Interchange Format (GIF) image file.
- The Copy and Timescale options let you fie-tune what you want to copy.
- For this exercise, you want to copy the selected rows for screen-resolution quality and leave the timescale as shown on the screen.
- **5.** Click **OK**.
- Project copies a graphic image of the Gantt chart for just the selected rows to the Windows Clipboard.
- **6.** On the **Start** menu, click **All Programs**, and in the **Accessories** program group, click **WordPad**.
- WordPad opens and creates a new document.
- 7. In WordPad, click Paste.
- WordPad pastes the graphic image of the Gantt Chart view into the new document.

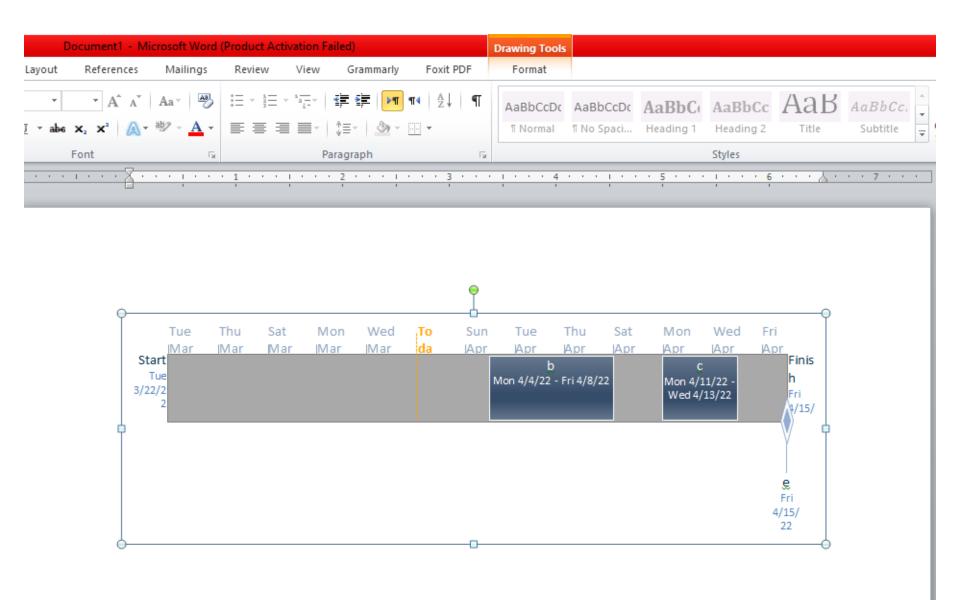


- 8. Switch back to Project.
- 9. Click anywhere in the Timeline view.
- **10.** On the **Format** tab, in the **Copy** group, click **Copy Timeline**.
- The Copy Timeline options appear.



#### 11. Click Full Size.

- Project copies a graphic image of the timeline to the Clipboard.
- **12.** Switch back to WordPad and then press the Enter key a few times to add some space below the Gantt chart image.
- 13. In WordPad, click Paste.
- WordPad pastes the graphic image of the Timeline view into the new document.



#### **Printing Views**

Printing views allows you to put on paper just about anything you see on your screen.

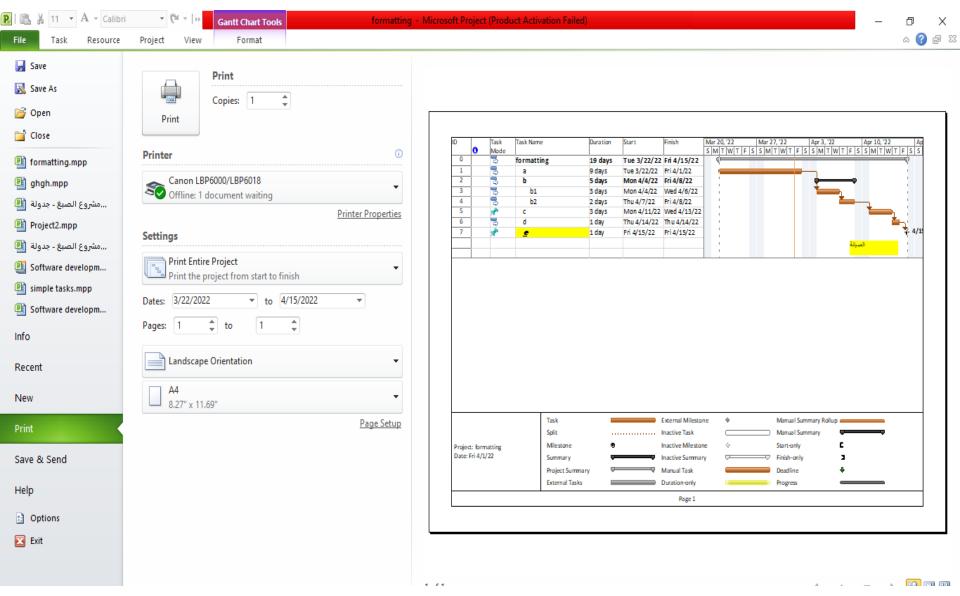
For a project with many tasks, what you can see on your screen at one time may be a relatively small portion of the full project.

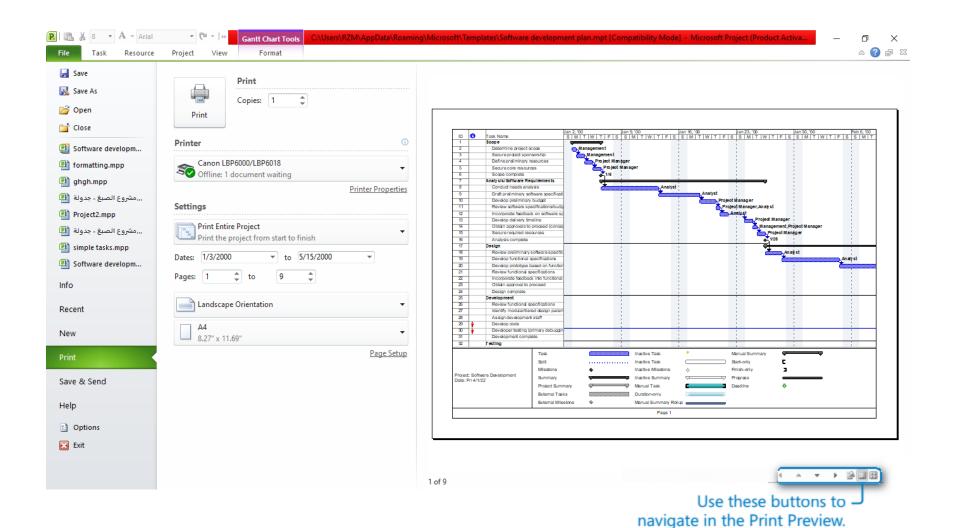
In this exercise, you will see the Print Preview of the Gantt Chart and Timeline views.

1. On the File tab, click Print.

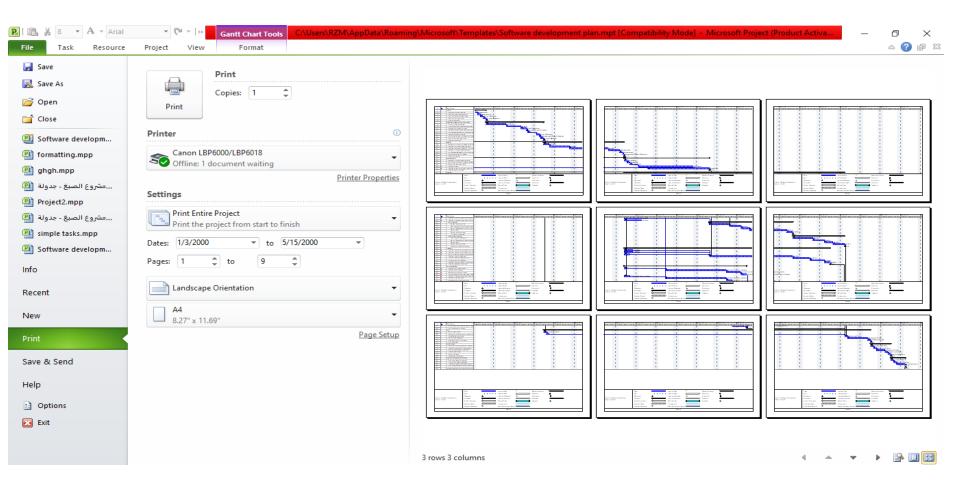
The Print Preview appears in the Backstage view with the Gantt Chart in the preview.

## **Printing Views**

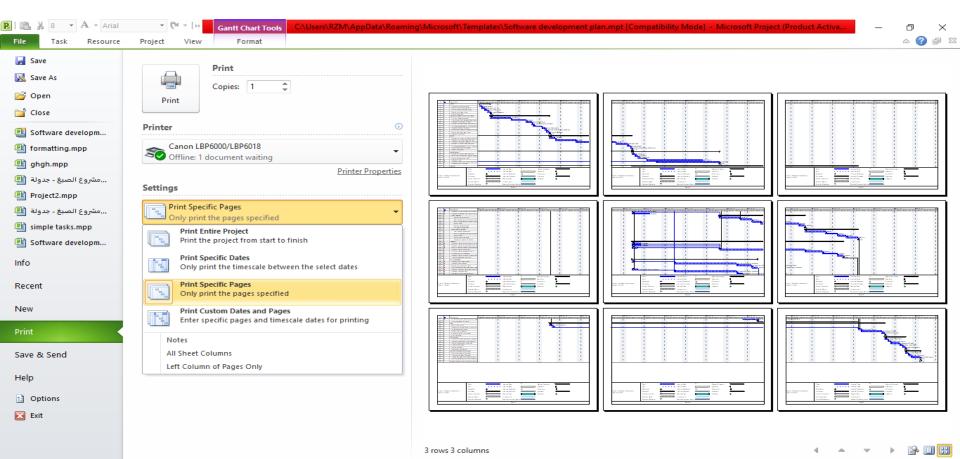


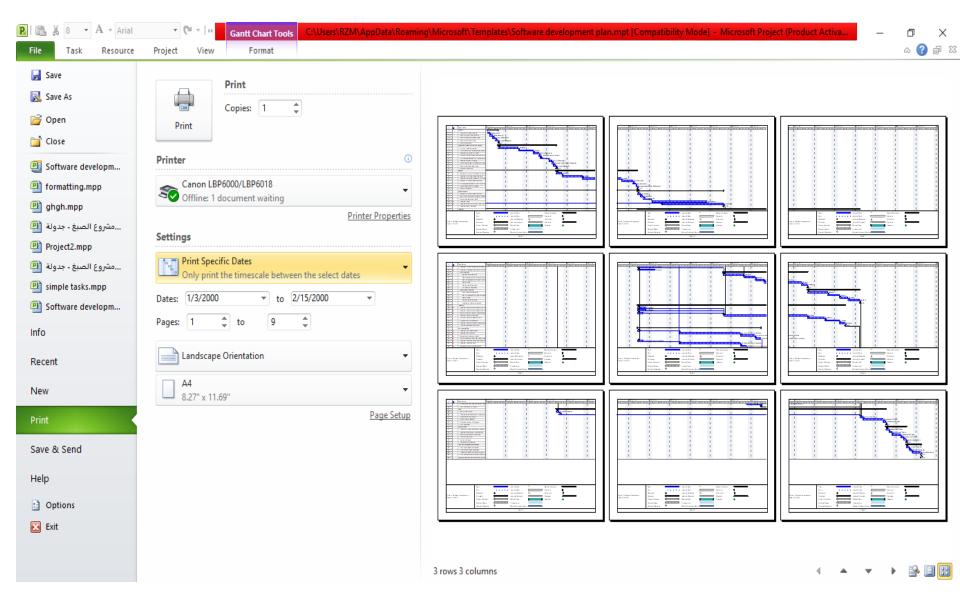


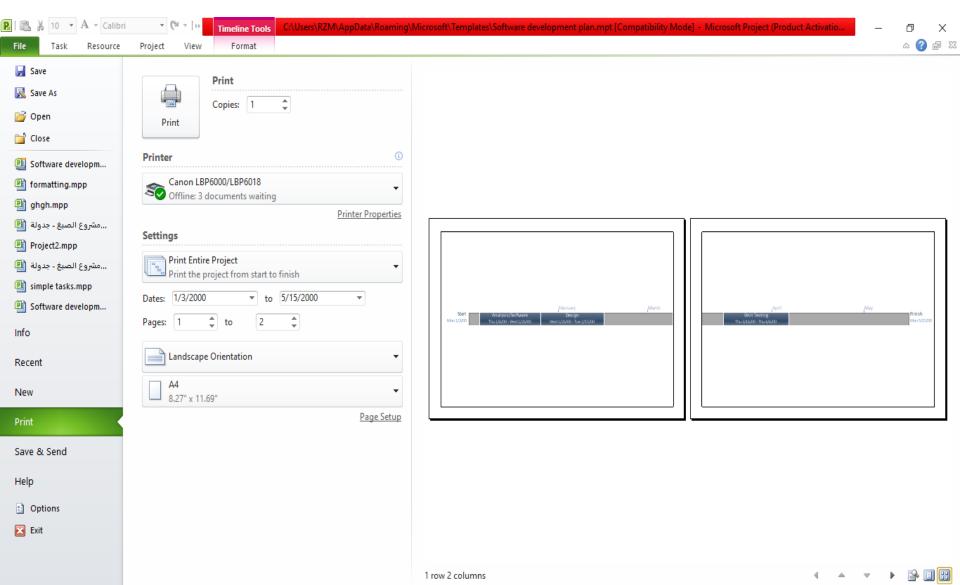
#### 2. Click Multiple Pages

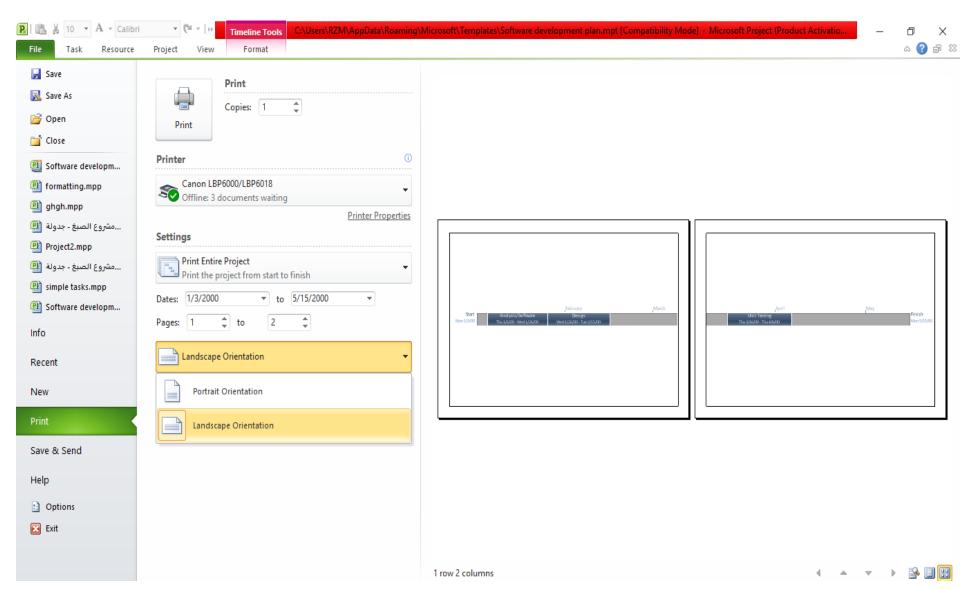


**3.** Under **Settings**, on the left side of the Print Preview window, click **Print Entire Project** to display additional printing options. Choose one of types then click **print**.









1. Click **Page Setup**; this appears at the bottom of the controls, to the left of the print preview.

The Page Setup dialog box appears—note that the dialog box title includes the

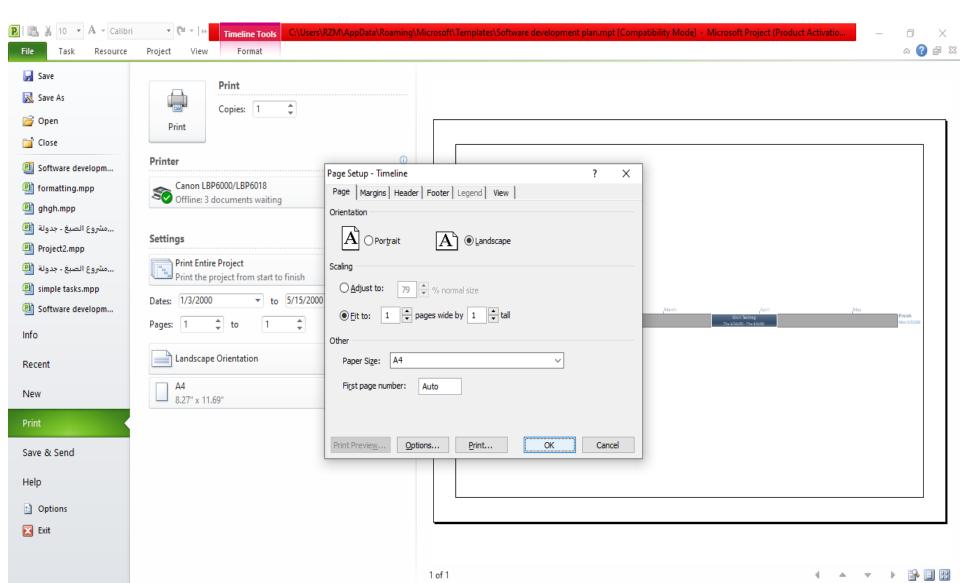
word "Timeline." You can customize the page setup options that apply to this

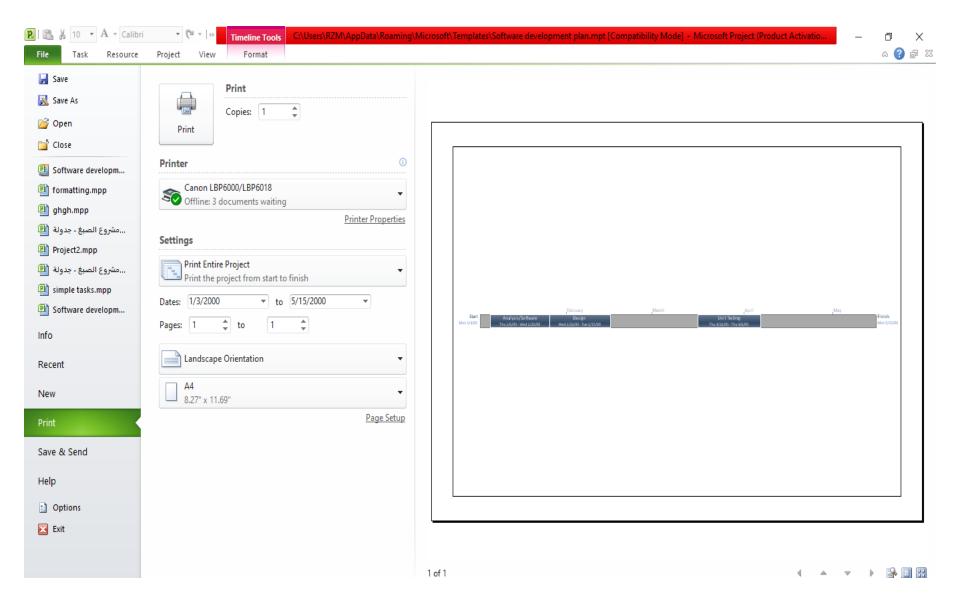
particular view.

2. Make sure the Page tab is visible, and then, under Scaling, click Fit to 1 pages wide by 1 tall.

#### 3. Click OK.

Project resized the Timeline print preview so it now fis on a single page.





Reports are intended for printing Project data. Unlike views, which you can either print or work with on the screen, reports are designed only for printing or for viewing in the Print Preview window. You do not enter data directly into a report.

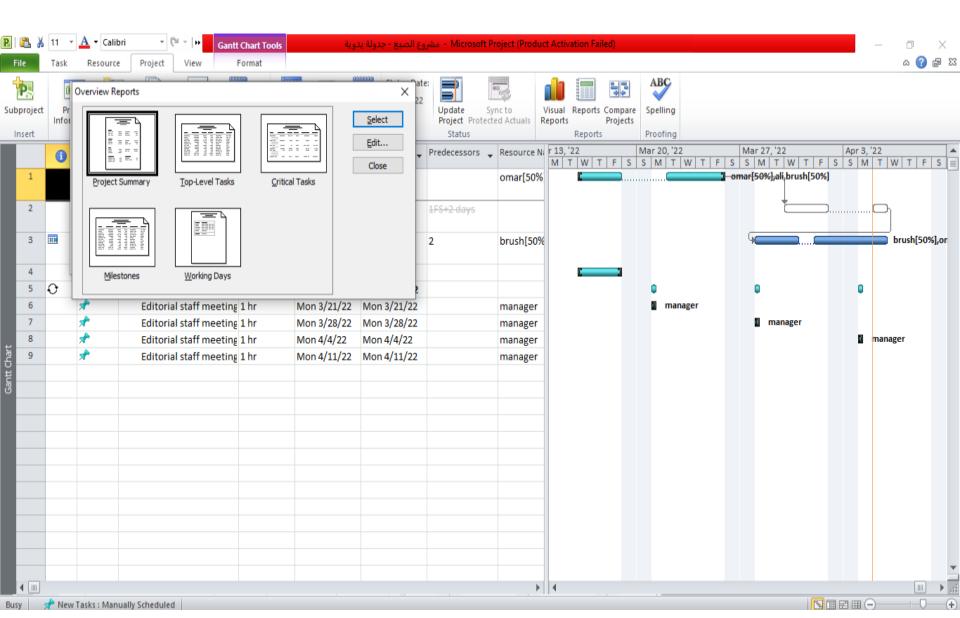
Project includes several predefined task, resource, and assignment reports that you can edit to obtain the information you want.

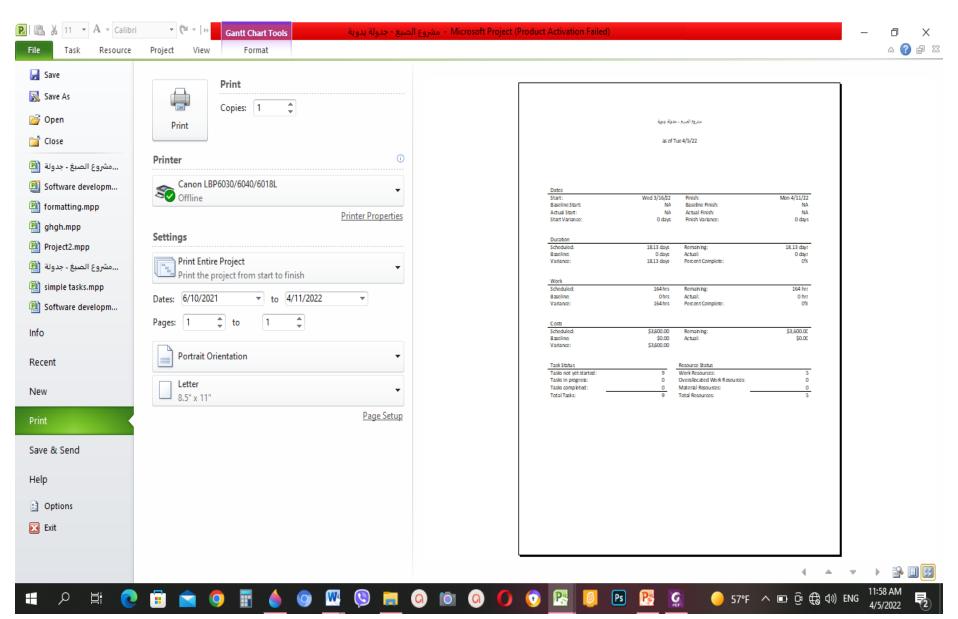
In this exercise, you view reports in the Print Preview window and then edit their formats to include additional information.

1. On the **Project** tab, in the **Reports** group, click **Reports**.



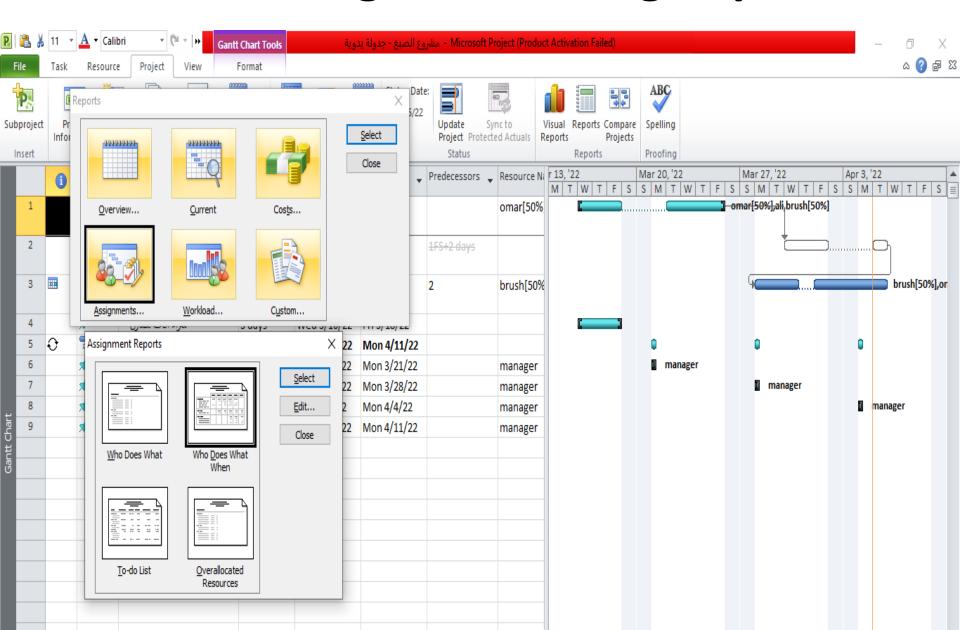
- 2. Click Overview, and then click Select.
- The Overview Reports dialog box appears, listing the fie predefined reports in Project that provide project-wide overview information.
- 3. In the Overview Reports dialog box, click Project Summary, and then click Select.
- Project displays the print preview of the report in Backstage view

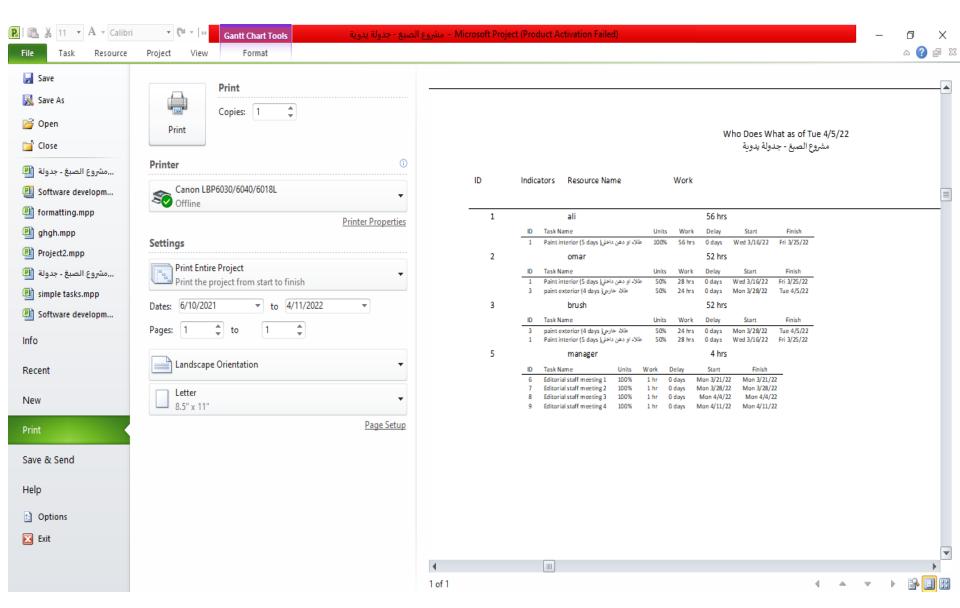




This report is a handy summary of the project plan's tasks, resources, costs, and current status. You could use this report, for example, as a recurring status report that you share with the clients or other *stakeholders* of the project.

- 5. On the **Project** tab, in the **Reports** group, click **Reports**.
- **6.** Click **Assignments**, and then click **Select**.
- The Assignment Reports dialog box appears, listing four predefined reports in Project that provide resource assignment information.
- 7. In the Assignment Reports dialog box, click Who Does What When, and then click Select.
- Project displays the multiple pages of the Who Does What When report in the Print Preview window.

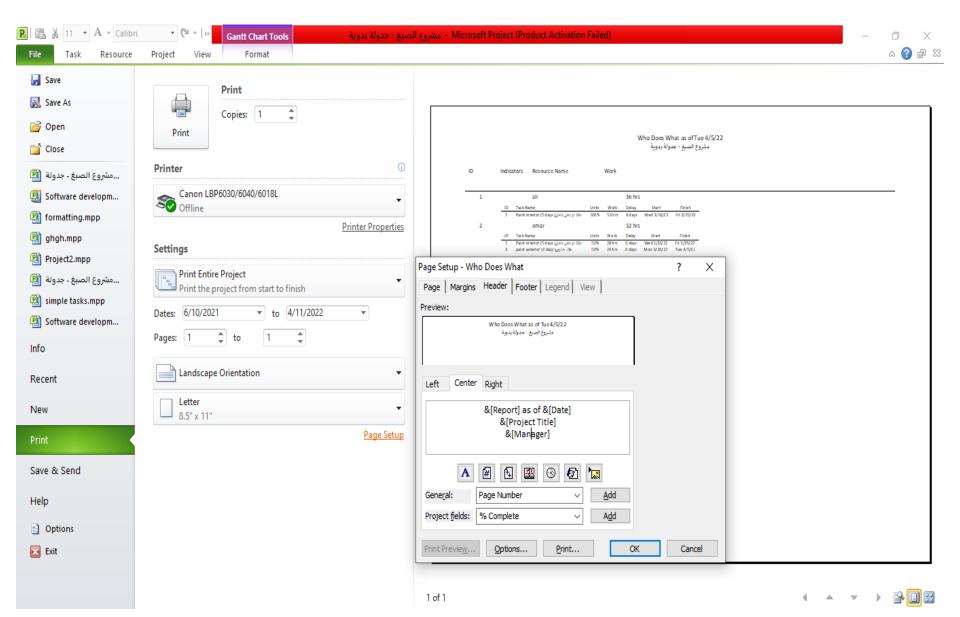




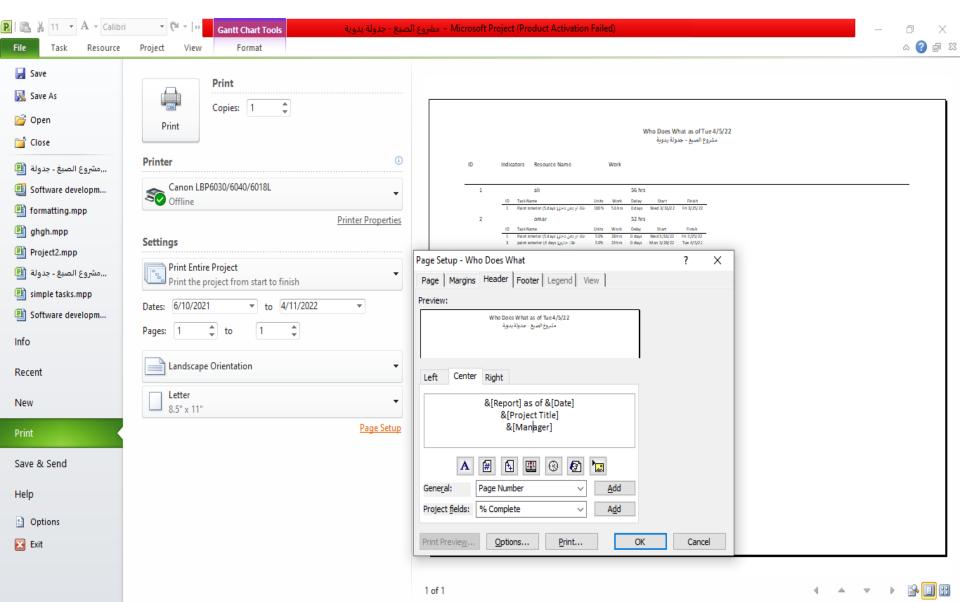
To conclude this exercise, you will reformat the project name as it appears in the report title.

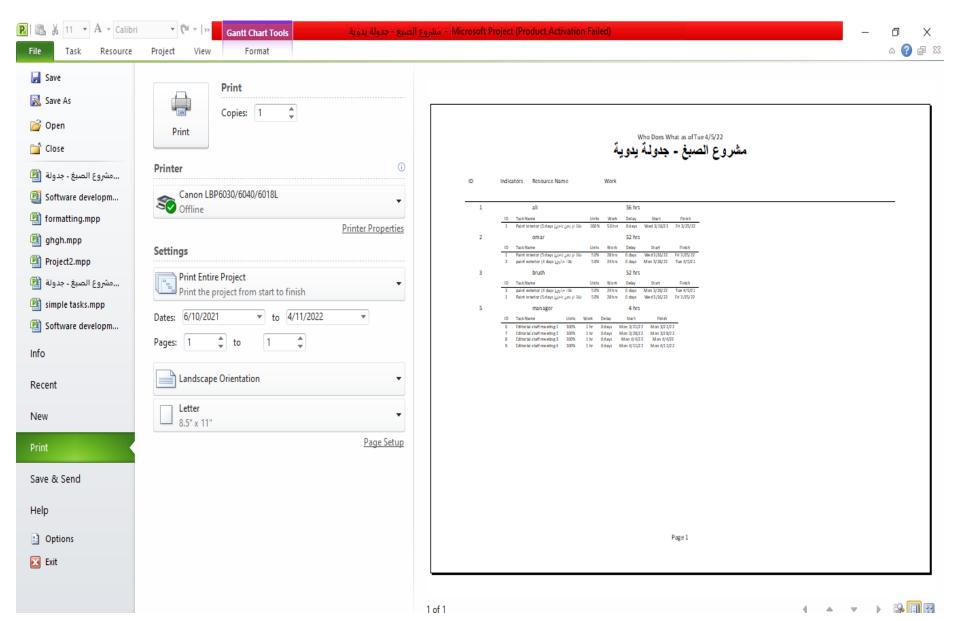
- **8.** Click **Page Setup** at the bottom of the controls in the print preview.
- The Page Setup dialog box appears. This time, it shows the options that you can adjust when working with this report.
- 9. Click the Header tab

In the upper portion of the tab, you see the preview of the report's header. Below that, you can see the codes that make up the header text. These codes include the project title and manager name, which are two properties of the project plan.



- 10. In the Center tab, select the text &[Project Title] and then click Format Text Font.
- The Font dialog box appears.
- **11.** Under **Font Style**, click **Bold**, and under **Size**, click **14.** Click **OK**.
- The customized report header appears in the Page Setup dialog box.





# Thank you