



MS Project Basics

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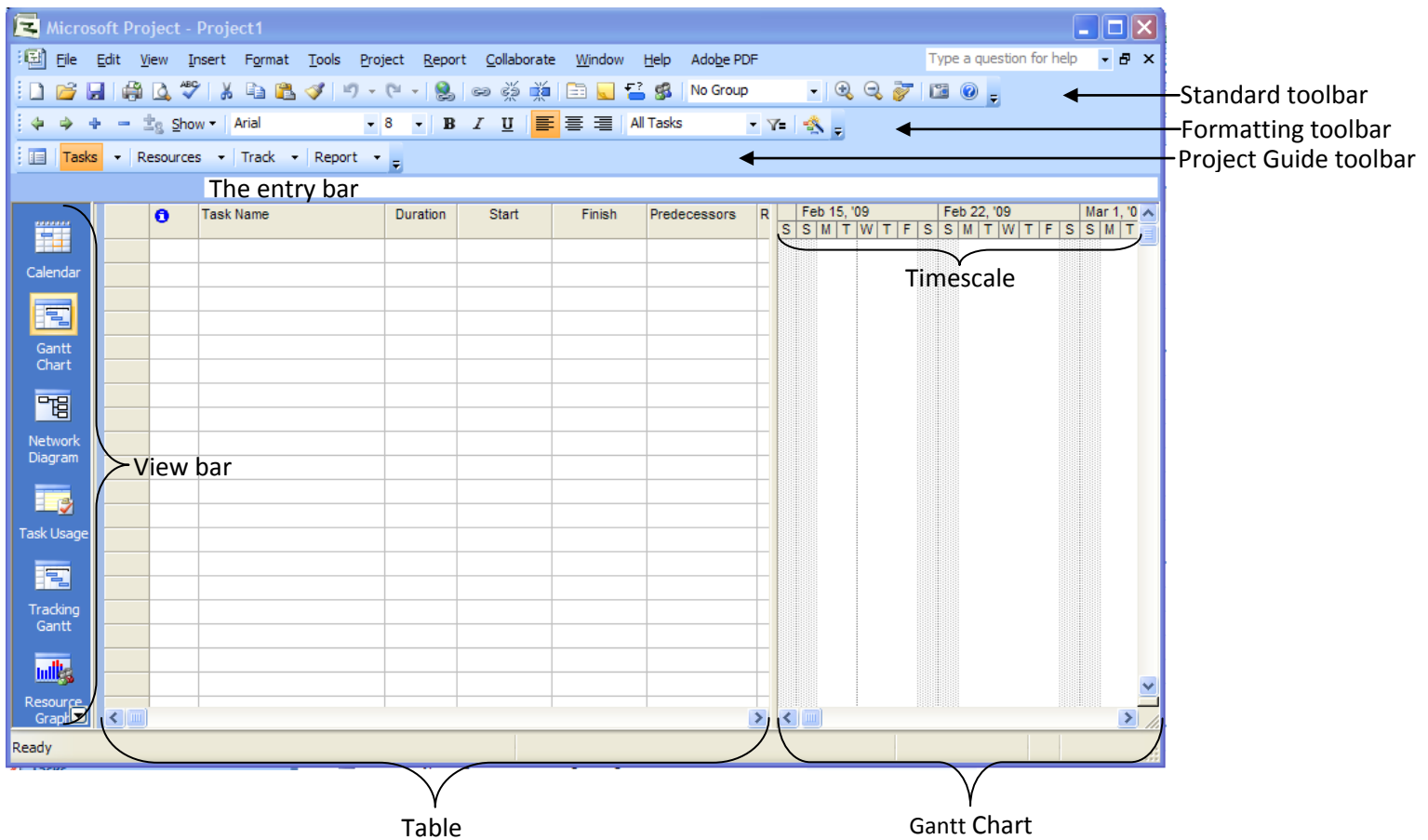
Lesson 5: Finalizing and Update Progress

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The Project Environment











- The Standard toolbar- shortcut commands for opening, closing and printing a project plan
- The Formatting toolbar- frequently used formatting tools
- The Project Guide toolbar- links to navigate through a project plan
- The entry bar- enter and edit project tasks
- The Table- information about tasks, resources and assignments
- The Gantt Chart- displays graphic duration of tasks
- The Timescale- time period indicator at top of Gantt Chart
- The View bar- buttons for commonly used views

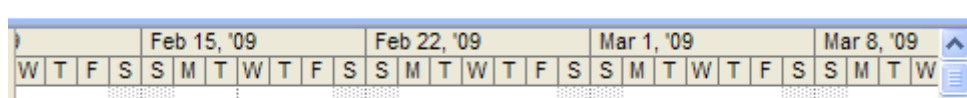
Project Views

With the use of the View Bar, the views display information within different formats.

1. By default the View bar is not active. Click on **View** and select **View Bar**.

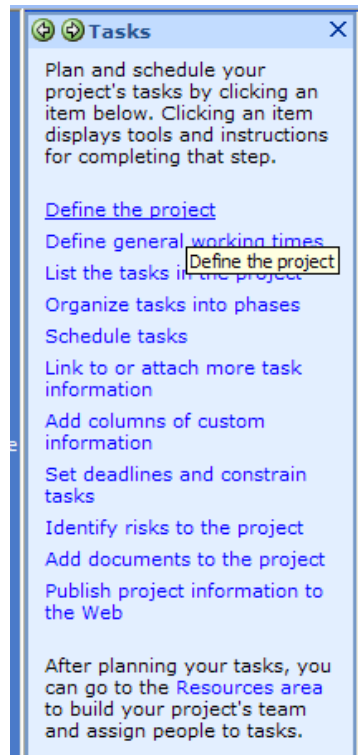
	Edit, show tasks on scheduled days, weeks, or months in a calendar view.
 Gantt Chart	View/ observe tasks and durations in a bar graph format. This view appears by default.
 Network Diagram	Displays tasks in a flowchart format.
 Task Usage	Review, enter, and edit assignments by task. Each task is listed with the assigned resources beneath it. Appearance of the details in a more clear and effective view.
 Tracking Gantt	View tasks and information in a sheet, and a chart showing a baseline and scheduled Gantt bars for each task.
 Resource Graph	Within a column graph format, view resource allocation.
 Resource Sheet	In a spreadsheet format enter, edit, and review resource information.
 Resource Usage	Contains a list of resources with associated task assignments. Review, enter, and edit assignments by resource.

2. Timescale is a time period indicator at the top of the *Gantt chart*, *Resource Graph*, *Task Usage*, and *Resource Usage*.



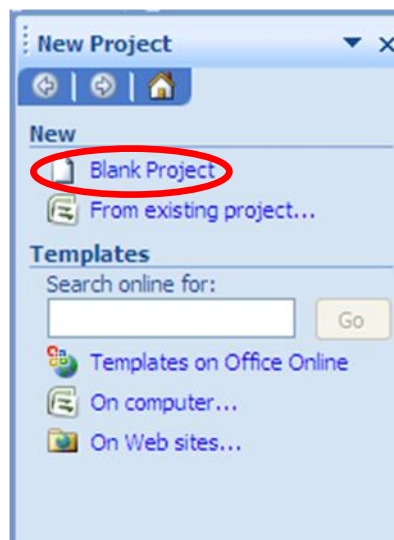
Project Guide toolbar

1. To activate the Project Guide toolbar.
 - a. From the menu bar, click on **View** and select **Turn on Project Guide**.
2. Within the **Tasks** side pane, click on **Define the project** link. From the screen it acts as a wizard to help you through the process of creating a new project file.



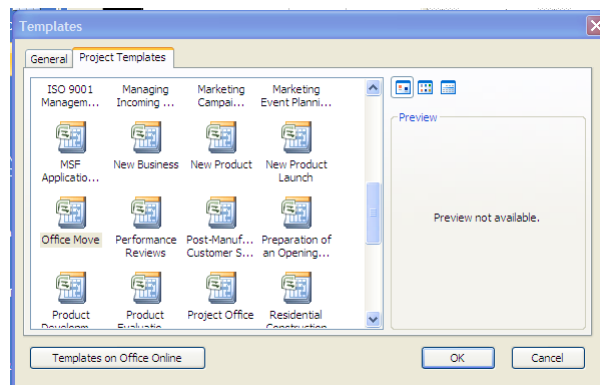
Creating a New Blank Project

1. Click on **File** and select **New**. On the **New Project** task pane, click on **Blank Project**.



Using Project Templates

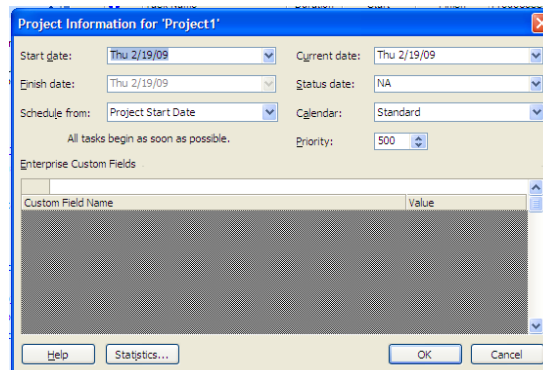
1. Click on **File** and select **New**. On the **New Project** task pane, click **On computer** and click the **Project Templates** tab. Select a template and click on **OK**.



Project Information dialog box

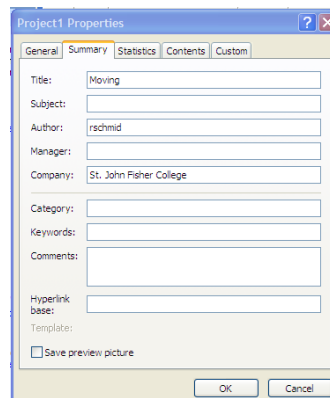
You can use the **Project Information** dialog box to create a new project.

1. Click on **Project** and select **Project Information**.
 - a. Enter a start date in the **Start Date** text box, and click on **OK**.
 - b. Save the file, click on **File** and select **Save**. Name the file and save to a preferred location.



Project Properties

1. Define the file properties.
 - a. Click on **File** and select **Properties**. From the **Summary** tab and enter details of project. Click **OK** to close Properties dialog box.

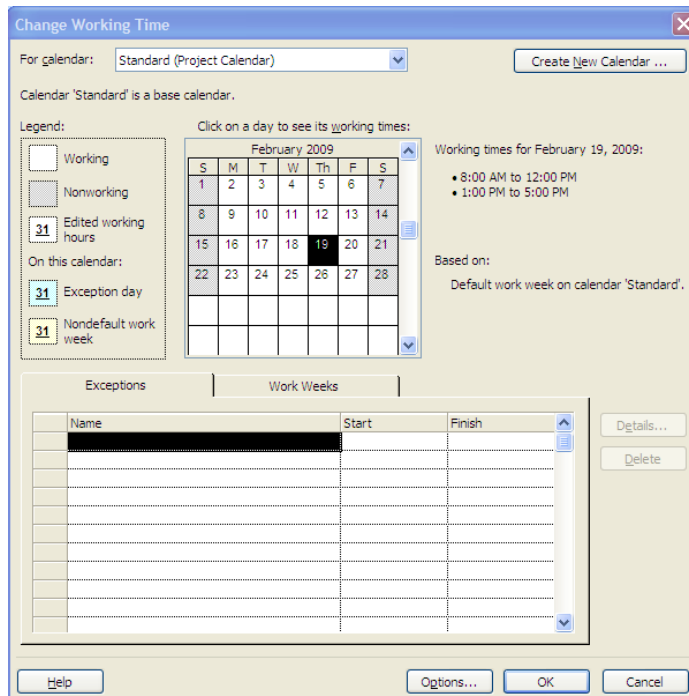


Project Calendar

A Project must base its schedule on a measure of time. Microsoft Project has three default base calendars that it uses to create a schedule for a project.

Standard	Monday through Friday 8am-5pm with 1 hr. break
24 Hours	For projects that are worked on around the clock.
Night Shift	Monday night through Saturday morning 11pm-8am with 1hr. break

1. Click on **Tools**, and select **Change Working Time**.



Entering Tasks

A task represents the work to be done to accomplish the goals of the project.

1. Enter Tasks:
 - a. From the **Entry** table. Click in the desired row and enter a **task name**, press **enter**. Continue until all tasks for the project have been entered.
2. To enter Subtasks:
 - a. Insert a new row in the **Entry** table. When inserting a new task, by default new rows are inserted above selected row.
 - b. Click on **Insert** and select **New Task**. Or you can press the **Insert** key from your keyboard.

Task Name	Duration	Start	Finish	Predecessors	Resc	Feb 22 '09	Mar 1, '09
1 move offices SOE	26 days	Mon 4/27/09	Mon 6/1/09				
2 contact facilities dept	16 days	Mon 2/23/09	Mon 3/16/09				
3 painting	5 days	Mon 2/23/09	Fri 2/27/09				
4 carpeting	7 days	Mon 3/2/09	Tue 3/10/09	3			
5 move furniture	4 days	Wed 3/11/09	Mon 3/16/09	4			
6 contact OIT dept	2 days	Mon 2/23/09	Tue 2/24/09				
7 move computers and	2 days	Mon 2/23/09	Tue 2/24/09				
8 notify professors	1 day?	Mon 2/23/09	Mon 2/23/09				
9 get boxes	1 day?	Mon 2/23/09	Mon 2/23/09				
10 order new office furniture	1 day?	Mon 2/23/09	Mon 2/23/09				

Editing Tasks

Tasks within your project plan can change, editing tasks correctly will make it easier for you while working in Microsoft Project.

1. To Edit text:
 - a. Select the **task** name, click in the **entry** bar to edit text, press **enter** or click on the **green check mark**.
2. To Move a task:
 - a. Select the entire task by clicking on the **ID number** of the task.
 - b. Right-click the **ID number** and select **Cut Task**.
 - c. Click the row where you want the task to be placed.
 - d. Right-click the **ID number** and select **Paste**.
3. To Copy a task:
 - a. Select the entire task by clicking the ID number for the task.
 - b. Right-click on the ID number and select **Copy** task.
 - c. Click the row where you want the task to be placed.
 - d. Right-click the ID number and select **Paste**.
4. To Insert a task:
 - a. Select the task below the row where you want the new task inserted.
 - b. Press the **Insert** key.
 - c. Or.... Click on **Insert**, select **New Task**.
 - d. OrRight-click on the **ID number** and select **New Task**.
5. To Delete a task:
 - a. Select the entire task by clicking on the **ID number** and press the **Delete** Key.
 - b. Or...Right-click on the **ID number** and select **Delete Task**.

Enter Task Duration


Best practice is to enter duration estimates for tasks, allowing Project to schedule the task start and finish dates.

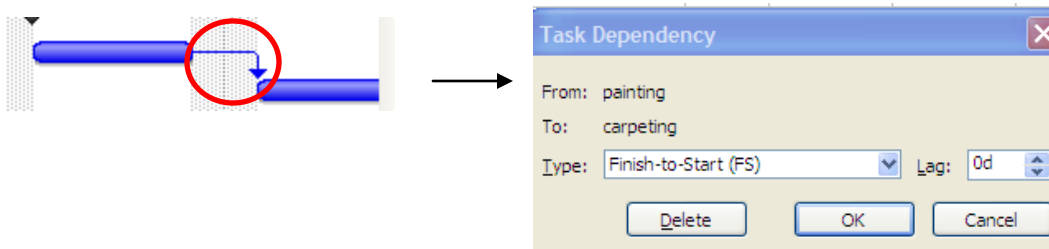
1. Duration can be displayed in minutes, hours, days, and weeks.
 - a. Minutes are displayed as: m, mins, minute.
 - b. Hours are displayed as: h, hr, hour.
 - c. Days are displayed as: d, dy, day.
 - d. Weeks are displayed as w, wk, week.

Duration	Start	Finish
26 days	Mon 4/27/09	Mon 6/1/09
14 days	Mon 2/23/09	Thu 3/12/09
5 days	Mon 2/23/09	Fri 2/27/09
1 wk	Mon 3/2/09	Fri 3/6/09
4 days	Mon 3/9/09	Thu 3/12/09
2 days	Mon 2/23/09	Tue 2/24/09
2 days	Mon 2/23/09	Tue 2/24/09
1 wk	Mon 2/23/09	Fri 2/27/09
15 mins	Mon 2/23/09	Mon 2/23/09
1 day?	Mon 2/23/09	Mon 2/23/09

Linking Tasks

Linking establishes a dependency between tasks. Task relationships by default Project links tasks in a finish-to-start dependency.

1. Select the tasks that you want to link, and then click the **Link Task** button .
2. From the Gantt Chart double-click the **link**. The Task Dependency dialog box will appear, allowing you change the type of dependency.



Task Constraint Types

Three types of constraints; Flexible, Semi-Flexible, and Inflexible.

Constraint type	Constraint name	Description
Flexible	As Late As Possible (ALAP)	Schedules the task as late as possible with the task ending before the project ends and without delaying subsequent tasks. This is the default constraint for tasks when you schedule from the project finish date. Do not enter a task start or finish date with this constraint.
Flexible	As Soon As Possible (ASAP)	Schedules the task to begin as early as possible. This is the default constraint for tasks when you schedule from the project start date. Do not enter a start or finish date with this constraint.
Semi-Flexible	Start No Earlier Than (SNET)	Schedules the task to start on or after a specified date. Use this constraint to ensure that a task does not start before a specified date.
Semi-Flexible	Finish No Earlier Than (FNET)	Schedules the task to finish on or after a specified date. Use this constraint to ensure that a task does not finish before a certain date.
Semi-Flexible	Start No Later Than (SNLT)	Schedules the task to start on or before a specified date. Use this constraint to ensure that a task does not start after a specified date.
Semi-Flexible	Finish No Later Than (FNLT)	Schedules the task to finish on or before a specified date. Use this constraint to ensure that a task does not finish after a certain date.
Inflexible	Must Finish On (MFO)	Schedules the task to finish on a specified date. Sets the early, scheduled, and late finish dates to the date that you type and anchors the task in the schedule.
Inflexible	Must Start On (MSO)	Schedules the task to start on a specified date. Sets the early, scheduled, and late start dates to the date that you type and anchors the task in the schedule.

Help menu→Project Home→Building a schedule

To apply a constraint to a task:

1. Double-click on the task.
2. Within the **Task Information** dialog box, click on the **Advanced** tab.
3. Click the **Constraint type** drop-down arrow, select the desired type of constraint.

4. Click drop-the

The screenshot shows the 'Task Information' dialog box with the 'Advanced' tab selected. The 'Constraint type' is set to 'Finish No Earlier Than' and the 'Constraint date' is 'Tue 3/31/09'. Other fields include Name, Duration, Deadline, Task type, Calendar, WBS code, and Earned value method.


the **Constraint date** down arrow and from calendar select the desired date.

Add Notes to a Task

Task notes are additional or supporting information that is added to a task.

1. Double-click on the task, select the **Notes** tab and enter the information in the **Notes** section.


The screenshot shows the 'Task Information' dialog box with the 'Notes' tab selected. The 'Name' is 'boxes' and the 'Duration' is '1d'. The 'Notes' section contains the text 'check with Central dup for boxes before buying.'

2. Notes  are indicated in the information section of entry table.


Resources

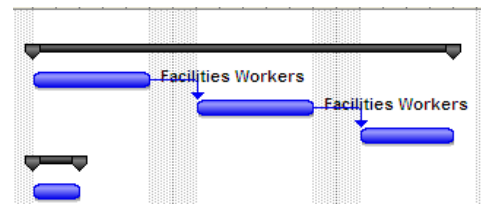
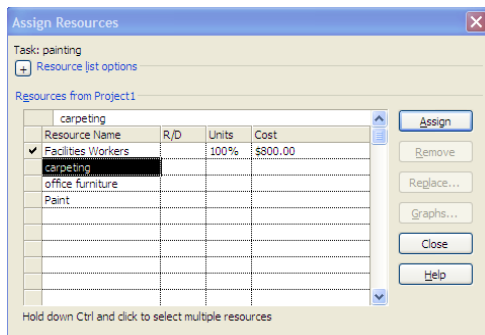
People, equipment, material and other items used to complete a task are **Resources**. You can assign more than one resource to a task.

1. Click on **View** and select **Resource Sheet**.
2. In the Resource Name field, enter the names of the resources you will use for your project.
3. Work, material, cost, and budget are types of resources.

		Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate
1		Paint	Material		P			\$0.00
2		carpeting	Material		c			\$0.00
3		Facilities Workers	Work		F		100%	\$20.00/hr
4		office furniture	Cost		o			

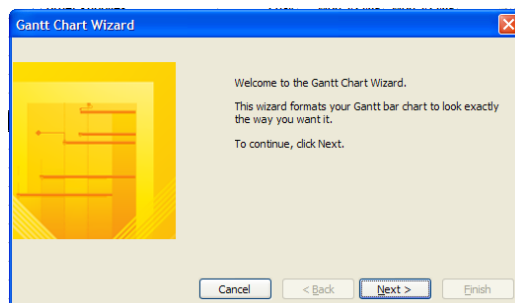
Assign Resources

1. Click on the **Gantt Chart view**, select a task which you want to assign a resource.
2. Click the Assign Resources button .
3. Within the **Assign Resources** dialog box, click the resource names, then click on **Assign**.

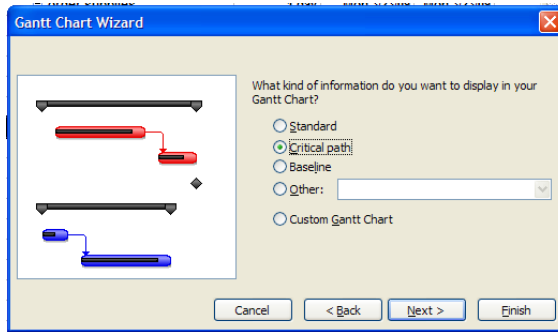


Display Critical Path

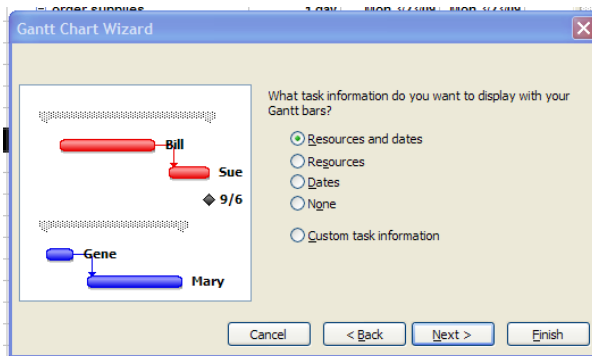
1. Click on **Format** and select **Gantt Chart Wizard**.
2. Within the **Gantt Chart Wizard**, click **Next**.



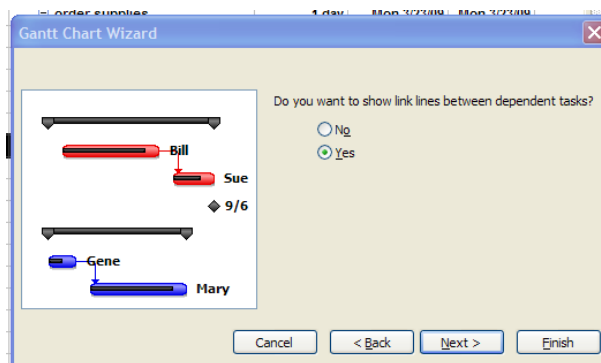
3. Verify that the **Critical path** option is selected and click **Next**.



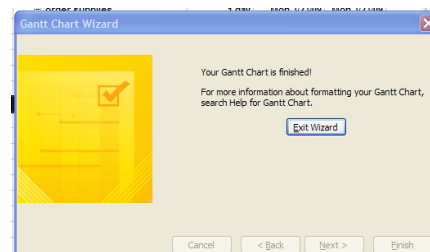
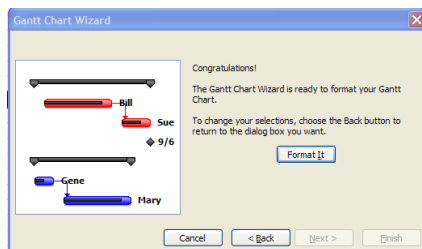
4. Verify that the **Resources and dates** option is selected and click **Next**.



5. Verify that the **Yes** option is selected and click **Next** to indicate that the link must be shown between dependent tasks and to move to the next page.



6. Click on **Format It** to apply the custom Gantt Chart and click **Exit Wizard** to view the newly formatted chart.



Set a Baseline

You have entered tasks, task durations, resources, assigned resources, and made necessary adjustment to your project. You can consider you project plan to be finalized. Before you begin tracking progress on the project, you want to preserve your original project estimates so that you will have some data to compare the actual project results with.

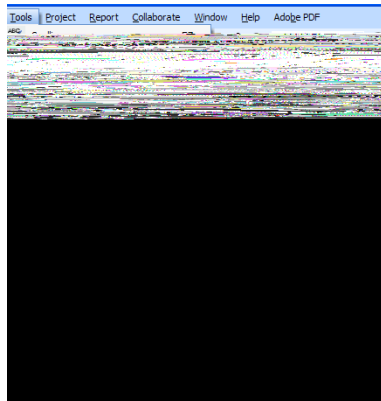
Once your project begins, you will enter information about how things are actually progressing and the current information will be altered. To calculate variances between the original plan and the actual project progress for project, saving a project **baseline** is essential.

Baselines are original project plans used to monitor a project's progress. After you enter the complete project information in your project plan, you save a baseline plan, so that you can view the results in the task sheet view. In effect, this saves a copy of the current date information for future reference.

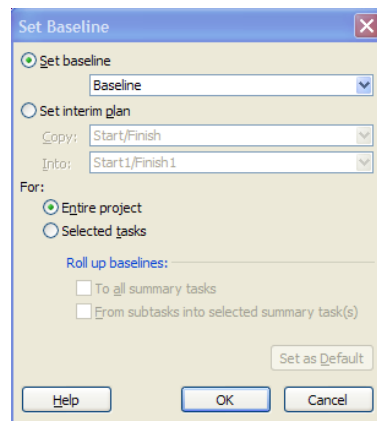
To Set a Baseline:

You can set up to 11 different baselines. The Set Baseline dialog box is used to set a baseline plan or interim plan.

1. Click on **Tools**→**Tracking**→**Set Baseline**.

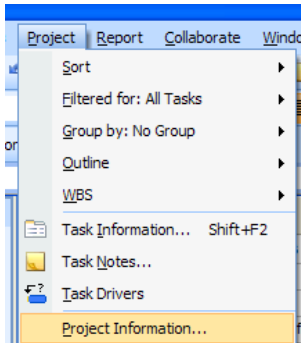


2. From within the **Set Baseline** dialog box, check **Set baseline**.
 - a. In the **For** section, select the **Entire project** or Selected tasks option.
 - b. Click OK to set the baseline.



To review the timing and sequence of tasks within a project against the actual information that shows what has actually occurred, the **Project Statistics** dialog box is used. This is accessed from the Project Information dialog box.

1. Project → Project Information2



2. From the **Project Information** dialog box, click on **Statistics**.
3. The **Project Statistics** dialog box, will show the **Current** Start and Finish, plus the **Baseline**.

The 'Project Statistics for 'Project1.mpp'' dialog box displays the following data:

	Start	Finish
Current	Mon 3/23/09	Thu 4/16/09
Baseline	Mon 3/23/09	Tue 4/14/09
Actual	NA	NA
Variance	0d	2d

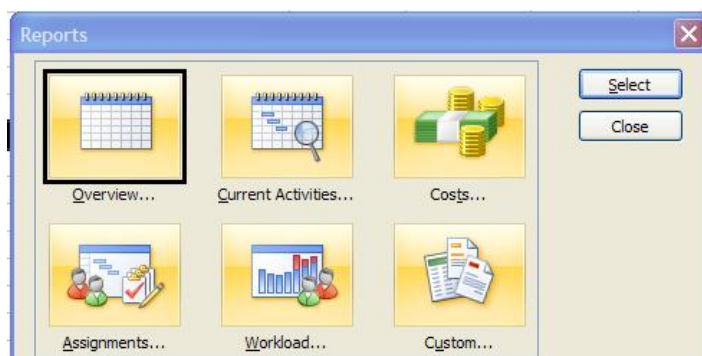
	Duration	Work	Cost
Current	18.53d	0h	\$0.00
Baseline	16.53d	0h	\$0.00
Actual	0d	0h	\$0.00
Remaining	18.53d	0h	\$0.00

Percent complete:
 Duration: 0% Work: 0%

Close

Print Project Summary Report

1. Click on the **Report** menu and select **Reports**.
2. Within the Reports dialog box, click the icon of the report category you want to print and click **Select**.

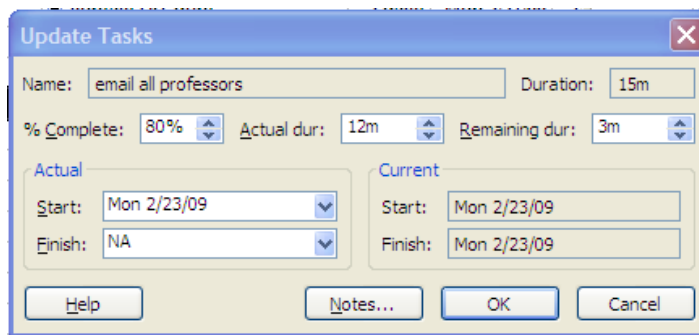


3. Within the **Overview Reports** dialog box, click on the icon of the report you want to print and click on **Select** to display a preview of the report.
4. Click on **Print** to print the report and within the **Print** dialog box, click **OK** to print out report.

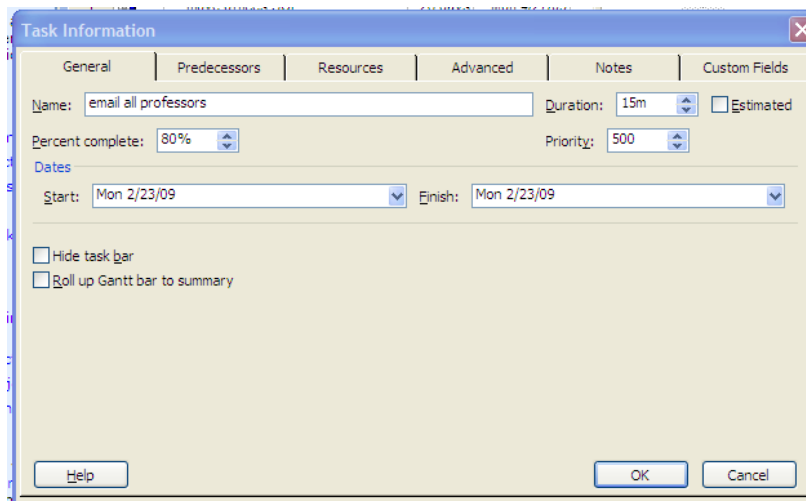
Updating and Manage

Updating the progress of your project is the only way to insure that your project stays on track as work is performed.

1. Select a task, click on **Tools**, select **Tracking** and click on **Update Tasks**.
2. Within the **Update Tasks** dialog box, enter the **% Complete** and click on **OK**.



3. Or... Right-click on the **ID number** of a task and select **Task Information**. Within the **General** tab, enter % complete.



Other Online Resources

Microsoft –“Get up to speed now with Project 2007”

<http://office.microsoft.com/en-us/project/FX100649011033.aspx?CTT=96&Origin=CL100627011033>