

## Microsoft Project

### Project Planning Tool



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## Project Management Software

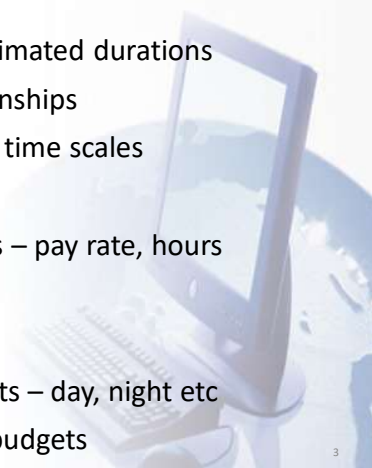
Project Management Software helps to plan activities, schedule work to be performed, view relationship among tasks, manage resources, and monitor progress of project in an easy-to-use graphical user interface mode.



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## Features of Project Management Software

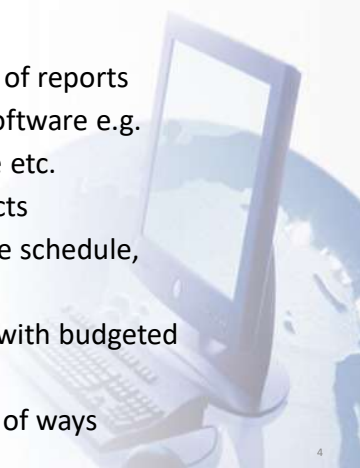
- ✓ Create task list & estimated durations
- ✓ Establish task relationships
- ✓ Work with variety of time scales
- ✓ Handle constraints
- ✓ Track team members – pay rate, hours worked, holidays
- ✓ Incorporate holidays
- ✓ Handle different shifts – day, night etc
- ✓ Monitor & forecast budgets



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## Features of Project Management Software

- ✓ Conflict of resources
- ✓ Generate wide variety of reports
- ✓ Interface with other software e.g. spreadsheet, database etc.
- ✓ Handle multiple projects
- ✓ Work on-line to change schedule, budget etc.
- ✓ Compare actual costs with budgeted costs
- ✓ Display data in variety of ways



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## Microsoft Project

Microsoft Project  
is most widely  
used, powerful,  
easy to use  
&  
affordable PM  
Software.



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## Microsoft Project Family

**Microsoft Project Standard** : Stand-Alone product, Has  
Scheduling & Resource Management features  
only, not designed to exchange data with Project  
Server

**Microsoft Project Professional** : Desktop Client to  
connect to Project Server, all other features are  
same as Standard

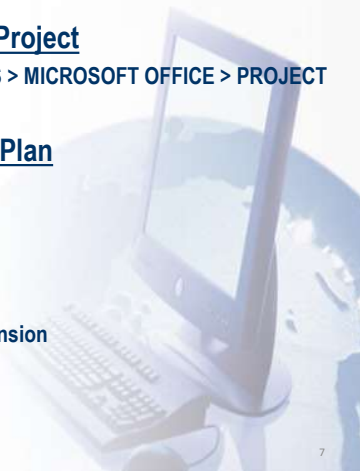
**Microsoft Project Server** : Provides Enterprise Project  
Management (EPM) features e.g. collaborative  
approach among teams using Project Web Access  
Software, Issue tracking & document  
management using Microsoft Share Point  
Software etc.



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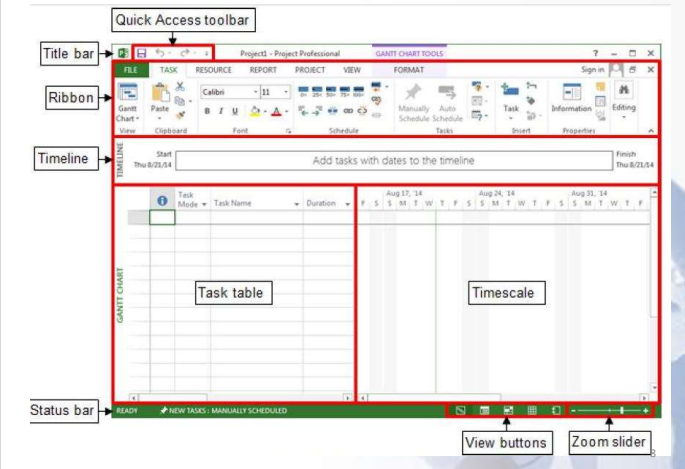
## Getting Started

- ✓ **Launching Microsoft Project**
  - START > ALL PROGRAMS > MICROSOFT OFFICE > PROJECT
- ✓ **Creating New Project Plan**
  - Click BLANK PROJECT
- ✓ **Saving Project Plan**
  - FILE > SAVE AS
  - Files are given .mpp extension



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## Screen Attributes



## Project Properties

### ✓ Input Project File

- FILE > INFO > PROJECT INFORMATION > ADVANCED PROPERTIES

### ✓ Input Start Date

- PROJECT > PROJECT INFORMATION > START DATE

### ✓ Choose Calendar

- PROJECT > PROJECT INFORMATION > CALENDAR

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## About Calendars

### ✓ STANDARD

- Default Calendar contains 5-Day Work-Week, 40 hrs per week, Monday thru Friday, 8am to 5 pm with 1 hr Break, No Holidays

### ✓ Other Calendar Options are

- NIGHT SHIFT
- 24 HOURS

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## Entering Tasks and Durations

### ✓ Entering Tasks

- Place Cellpointer under the Column TASK NAME in the Gantt Chart Spreadsheet Area
- Type Task Name
- Use INDENT/OUTDENT Icons in the Ribbon under TASK Tab to specify the WBS level of the Task.

### ✓ Entering Duration

- Place Cellpointer under the Column DURATION
- Type the Duration of the Task e.g. 1d or 1w or 1mo
- Observe how Start and Finish Dates appear under START and FINISH Columns.

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## Entering Relationships

### ✓ Entering Relationships

- Place Cellpointer under the Column PREDECESSORS
- Type Row Number of Predecessor's Task
- Use Comma if there are multiple predecessors
- Observe how Bars in the Gantt Chart move according to the relationships defined

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### Entering Relationships (Dependencies)

#### ✓ 2<sup>nd</sup> Option

- Highlight Tasks to be linked sequentially
- On TASK Tab, and within SCHEDULE Group in Ribbon
- Click on LINK TASKS Icon
- You can UNLINK TASKS Icon to Cancel above command

#### ✓ 3<sup>rd</sup> Option

- Point to the Task in the GANTT CHART area
- Drag the Mouse Button to Point another Task that is to be linked with 1<sup>st</sup> Task
- Repeat above steps till all dependencies are linked

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### Inserting, Deleting & Moving Tasks

#### ✓ Inserting Tasks

- Place Cellpointer where Task(s) are to be inserted
- Select TASK Tab and TASK Icon in the Ribbon
- Choose TASK

#### ✓ Deleting Tasks

- Highlight Row(s) containing Task(s) to be deleted
- Press DEL Key

#### ✓ Moving Tasks

- Highlight Row(s) containing Task(s) to be moved
- Hold Down Mouse Button & Drag

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### Viewing Task Information

- ✓ Place Cellpointer on the Task whose Information is to be viewed
- ✓ Double Click Mouse Button
- ✓ Different Information about Task can be viewed and accessed
  - General
  - Predecessors
  - Resources
  - Advanced
  - Notes
  - Custom Fields

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### Entering Milestones

- ✓ Insert a New Task
- ✓ Type in Task Name of the Milestone
- ✓ Specify Relationship of this Milestone
- ✓ Open TASK INFORMATION Box
- ✓ Select ADVANCED Tab
- ✓ Check MARK TASK AS MILESTONE Box

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### Viewing Critical Path

- ✓ Select VIEW Tab
  - Move to GROUP BY Icon in the Ribbon
  - Choose CRITICAL
- OR
- Move to FILTER Icon in the Ribbon
- Choose CRITICAL

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### Viewing Different Views

- ✓ Default View is GANTT CHART
- ✓ Different VIEW options that can be selected are:
  - CALENDAR
  - NETWORK DIAGRAM
  - RESOURCE SHEET/USAGE/FORM/GRAPH
  - TASK USAGE/FORM/SHEET
  - TEAM PLANNER
  - TIMELINE
  - TRACKING GANTT

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### Tables - Using Pre-defined Ones

- ✓ A table is a spreadsheet-like presentation of project data organized into vertical columns and horizontal rows.
- ✓ Each column represents one of the many fields in Project, and each row represents a single task or resource (or, in usage views, an assignment)
- ✓ Default Table that you see in Gantt Spreadsheet when you open a New Project Plan is ENTRY Table.
- ✓ MS-Project carry many pre-defined Tables that you can use for different purposes or can Create your own Customized Table.

### Changing Project Calendar

- ✓ Defining Working/Non-Working Days & Time
  - Select PROJECT Tab
  - Choose CHANGE WORKING TIME
  - Choose Calendar to be changed
  - Select WORK WEEKS > DETAILS
  - Select DAY(S) to make Working or Non-Working
  - Choose one of the options in the Radio Button that you desire to make WORKING TIMES for above day(s)

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### Changing Project Calendar

#### ✓ Defining Holidays

- Highlight Day/Days in the Calendar to be marked as Holidays
- Select EXCEPTIONS
- Type Holiday Description in the NAME Column
- Click on START Box
- Holiday Dates appear in START & FINISH Box and are marked by Red in the Calendar

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### Backstage View

- ✓ This option allows:
  - Managing Files
  - Setting Different Options for the Project
- ✓ Click FILE Tab
  - OPEN, NEW, SAVE, SAVE AS are standard File Management Commands
  - OPTIONS allow to choose Project Options e.g. Date/Currency Format, Show Project Summary etc
- ✓ To exit the Backstage view, click the Back button in the upper-left corner or Escape key.

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### Manual vs Auto Schedule

- ✓ Project by Default sets new Tasks to be manually scheduled
- ✓ This can be viewed at TASK MODE Column
- ✓ Manually Scheduled Tasks do not initially have Duration, needs to be entered e.g. 1d, 1w, 1mo etc
- ✓ Where-as Automatically Scheduled Tasks have initial suggestion for Duration e.g. 1Day?, 0.2wks?, 0.05mons
- ✓ Work with Manually Scheduled Tasks to quickly capture some details but without Scheduling Tasks
- ✓ Work with Automatically Scheduled Tasks to take full advantage of the powerful scheduling engine in Project

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### Manual vs Auto Schedule

- ✓ Use FILE > OPTIONS > SCHEDULE > NEW TASKS CREATED at the start of input of Tasks to set Manual or Auto Schedule as Default mode for the Project
- ✓ On TASK MODE Column, Choose between the two to set for each individual Tasks in question
- ✓ Highlight the Task, and Select TASK Tab, Choose MANUALLY SCHEDULE in TASKS Group in the Ribbon
  - You can select more than one Tasks by Highlighting and executing above command

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## Task Constraints

- ✓ Tasks can be assigned constraints affecting Schedules
- ✓ Place Cellpointer on the TASK
- ✓ Open Task Information Box, and Select ADVANCED Tab
  - ✓ DEADLINE
  - ✓ CONSTRAINT TYPE & CONSTRAINT DATE are constraints that can be defined to the task
- ✓ As Soon as Possible, As Late as Possible, Finish No Earlier than etc are few of the constraints that can be associated with the Task, and these affect the Scheduling of the Task

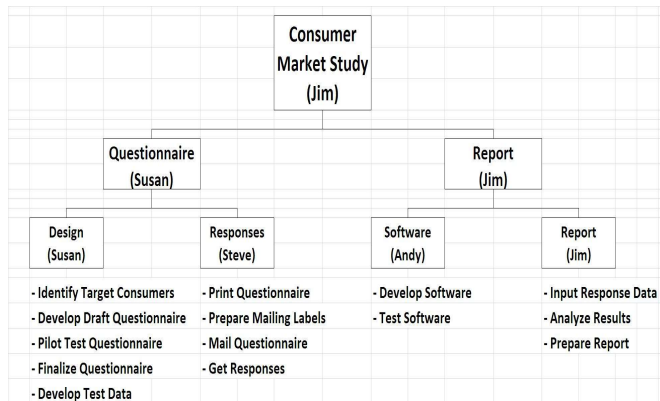
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## Formatting Bars in Gantt Chart

- ✓ Highlighting Critical Tasks, Slack, Late Tasks
  - Select FORMAT Tab, Choose BAR STYLES Group in Ribbon
  - Check CRITICAL TASKS Box to highlight Critical Tasks
  - Check SLACK Box to highlight Slack in Tasks
  - Check LATE TASKS Box to highlight Late Tasks as per current date
- ✓ Choosing Different Bar Styles
  - Select FORMAT Tab, Choose GANTT CHART STYLES Group in Ribbon
  - Click on to different Options, and see the effect on the Bar Styles in the Gantt Chart

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## Hands on Example



(Consumer Market Study Project)

WBS	Tasks	Duration (Days)	Predecessor	Successor
1.1.1	Identify Target Consumers	3	-	1.1.2
1.1.2	Develop Draft Questionnaire	5	1.1.1	1.1.3
1.1.3	Pilot Test Questionnaire	7	1.1.2	1.1.4
1.1.4	Finalize Questionnaire	4	1.1.3	1.2.1, 1.2.2, 1.1.5, 2.1.1
1.1.5	Develop Test Data	4	1.1.4	2.1.2
1.2.1	Print Questionnaire	10	1.1.4	1.2.3
1.2.2	Prepare Mailing Labels	2	1.1.4	1.2.3
1.2.3	Mail Questionnaire	4	1.2.1, 1.2.2	1.2.4
1.2.4	Get Responses	10	1.2.3	2.2.1
2.1.1	Develop Software	15	1.1.4	2.1.2
2.1.2	Test Software	7	1.1.5, 2.1.1	2.2.1
2.2.1	Input Response Data	7	1.2.4, 2.1.2	2.2.2
2.2.2	Analyze Results	7	2.2.1	2.2.3
2.2.3	Prepare Report	12	2.2.2	-