

Beginning Microsoft Project

BEGINNING MICROSOFT PROJECT 1

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What is project? What is it used for?

Project is a long-term project management tool that can be used by: Teachers, Students, Administrators, and Staff to manage time and control the workflow of any project or task. Using Gantt charts, and other tables Project can help make large tasks manageable and increase the manager’s ability to tack and change timetables and sub-projects.

Project Windows

Besides the usual window components (close box, title bar, scroll bars, etc.), Project has features you may recognize from spreadsheet programs, such as columns and rows and the formula bar used for editing.

Information is entered into fields as in a database and there are unique commands and tools specific to working with projects.

The standard toolbar, located beneath the menu bar, has buttons for commonly performed tasks. Some tasks unique to MS Project are linking and unlinking tasks, entering task information, and assigning resources. There are also drop down boxes for grouping and filtering data.

Views and Tables

Views allow you to look at a subset of project information in a certain format. For example, the default view, called the Gantt chart displays basic task information in columns and a bar graph.

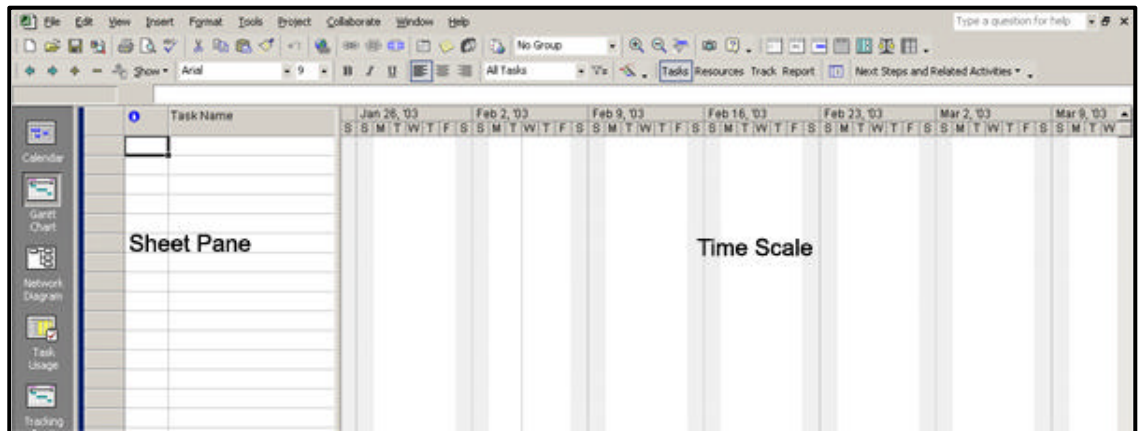


Figure 1: Sheet Pane and the Time Scale Pane in MS Project

Phase 1: Planning and Setting up Project

In this first phase we will begin looking at the planning and prep needed to design your project. This is best done in the initial stages of your project. Consequently this time should be mapped onto the MS Project Gantt chart later on.

Planning and Understanding a Gantt chart

Before opening project it is important to have some elements of the project mapped out. Understanding project milestones and having a concept of what tasks is part of a major backbone of the project will greatly aid you in using project.

An essential part of working with project is understanding Gantt Charts. For more on Gantt charts please check out the links in the reference section.

Getting Started

Once you have a clear idea of the tasks, and milestones in the project you should start project. When project loads then begin adding in your tasks in milestones. Start with the most immediate task and end with the least immediate task or milestone. For example if you were organizing a meeting then the tasks could be organized as such;

Tasks	Milestones
Meeting Topics	Topics Settled
Book Facilities	
Book Speaker & Participants	Facilities and Participants Booked
Call Caterer	
Call Audio Visual Support	Caterer and A.V. Support booked

Adding Tasks & Milestones

To start placing these tasks and milestones into project, simply **click on the first Task Name cell in the Sheet Pane**. Start adding in your tasks and milestones in start to finish order. Once you have added all your tasks and milestones into the task column then you begin adjusting the duration of the tasks.

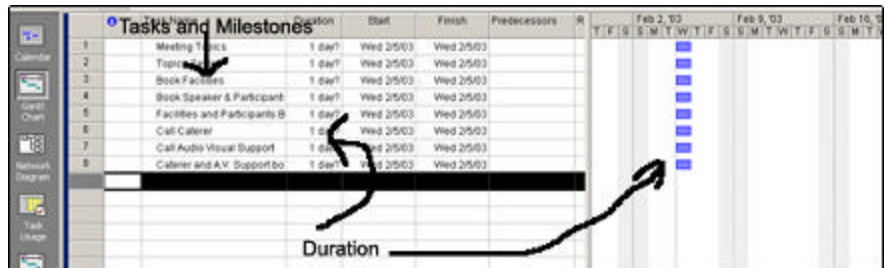


Figure 2: Tasks and Milestones columns and their duration.

Setting Duration

Milestones should be set to a 0 day duration, to **set a duration click on the corresponding duration cell**. Then using the up and down boxes you can choose the amount of working days it will take to complete the project

(NOTE: **Partial days** can be set as well ex. "0.25" days is equal to two hours or one-fourth a working day).

Once the duration of the tasks are set then you should alter start dates and align the different tasks on the Timescale. The start date is the day in which you desire the task to start.

Task Name	Duration	Start	
Meeting Topics	4 days	Wed 2/5/03	M
Topics Settled	0 days	Mon 2/10/03	M
Book Facilities	2 days	Wed 2/5/03	
Book Speaker & Participant:	5 days	Wed 2/5/03	T
Facilities and Participants B	0 days	Wed 2/5/03	Y
Call Caterer	2 days	Wed 2/5/03	
Call Audio Visual Support	4 days	Wed 2/5/03	M
Caterer and A.V. Support bo	0 days	Wed 2/5/03	Y
Conference Date	0 days	Thu 3/20/03	T

Figure 3: Duration box.

Setting Start Date

To change the start date, click on the start cell's drop down triangle. A calendar will open. Select the date in which the task should start. Alternatively you can move the blue task bar in the Timescale Pane to the appropriate start date.

When a task is moved the **Planning wizard** appears asking if the task is dependant on earlier ones. If a task is dependant on the previous task it is wise to **link** them

(example: You must call conference participants in order to know how many people you will need to give to the caterer.)

We know our target project end date, thus we will begin mapping each task to complete in series or sequence on the projected date, which in our example is the conference date.

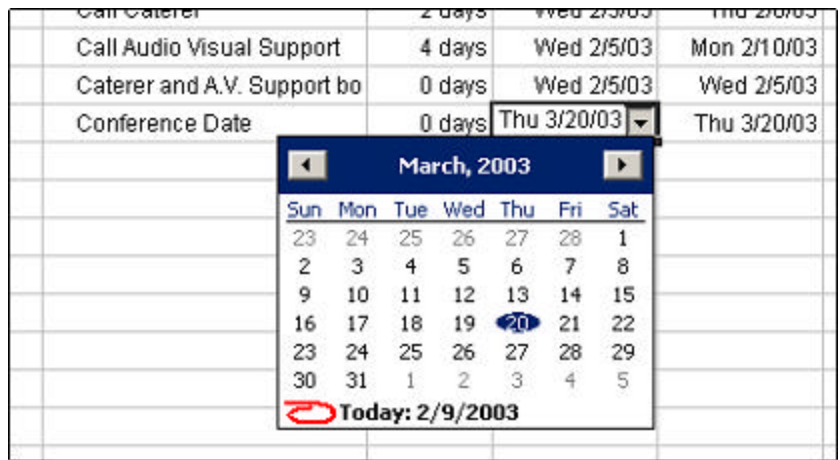


Figure 4: Using the calendar drop box.



You can also create links by highlighting the preceding task, and then using the CTRL key select the following task. Then click on the links button menu.

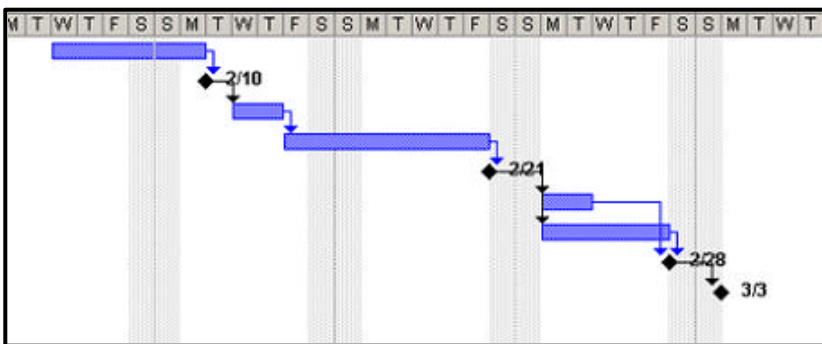


Figure 6: Completed Gantt chart with task links

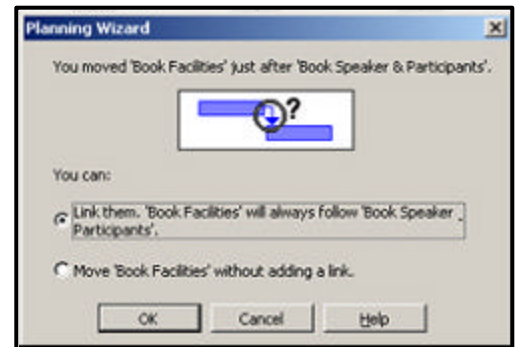


Figure 5: Planning Wizard pop up box.

Phase 2: Managing resources

Once you have your Project mapped out on the Gantt chart it is time to manage your resources. Resources can be anything from office space to personnel. We'll start with the most needed resource... Time.

Setting the work week

MS Project works on a standard workweek. What this means is that MS Project plans your workdays in eight-hour blocks (8AM –12 PM & 1PM – 5PM Monday through Friday). If this is your workweek, then you need not change anything. But many people work a non-standard workweek. This means that project times will be wildly off if you use a standard workweek as your template.

To change the workweek click **Tools → change working time...** Click on the new button. A pop up box will appear. Insert the name of this schedule (i.e. second shift, part time work, G.A. Schedule). Then in the box to the bottom right insert the shift hours.

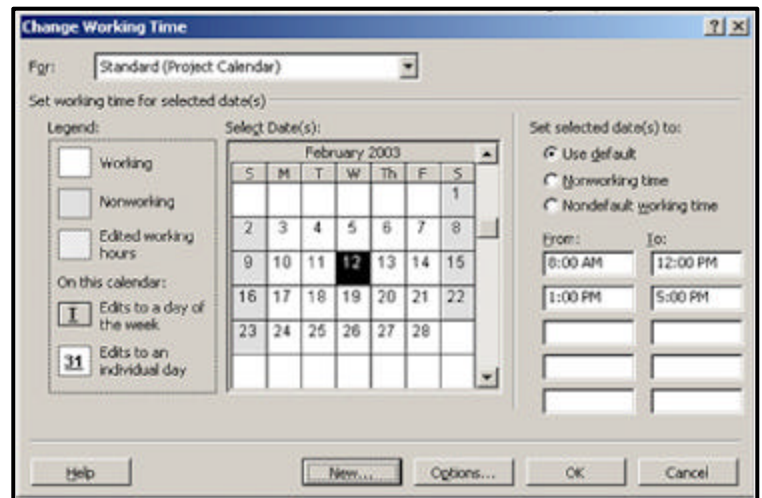


Figure 7: Change working time pop up box.

Assigning Resources

Click on **Tools** → **Assign Resources**.
The resource box should appear.

Resources can be added either by the resource box, or the resource column in the sheet pane. When a resource is assigned to a task the name then appears on the Gantt view.

Resources can be split on a task (i.e. Fred does 25% of the task, like compiling a list, and then Sue does the remaining 75%, calling the conference members).

Once resources have been assigned its time to move on to using project on a day-to-day basis.

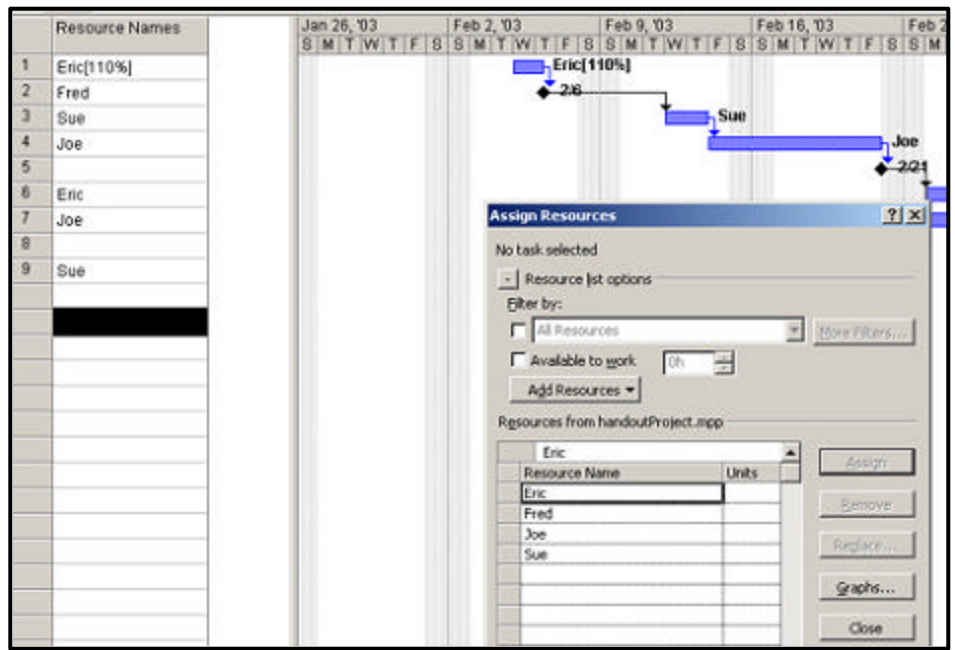


Figure 8: Assign Resources pop up box.

Phase 3: Using Project on a Day-to-Day basis.

MS Project is designed for a day-to-day reminder of project goals and tasks. Project makes updating and keeping your project on track very easy. The greatest tool in doing this is setting the **percent complete factor** on each task.

Enter a Task's Completeness

To set a task's completeness place the mouse to the left end of the task's bar. A percent sign and an arrow will appear. A text box will also appear giving a percentage of the task complete. Drag the percent cursor until the percentage completed meets the current percent complete.

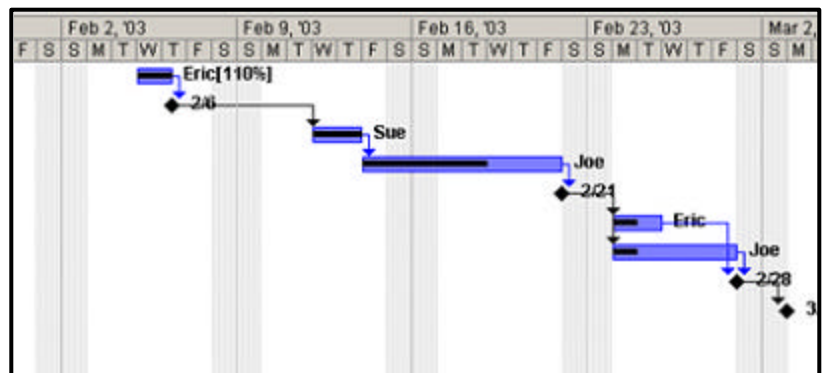


Figure 9: Gantt chart, which lists percent complete, and resources.

Saving Project as a Webpage

You can save data generated in the Sheet pane to an Html file for posting to the web.

1. Click File, Save as Webpage...
A pop up box will appear.
2. Enter the name of the file, and then click save.
The export map will appear.
3. Check the appropriate map and say OK.
4. Transfer the webpage to the web server.
5. Distribute the URL so that others can view the web page.

Resources and Assignments	Start	Finish	Work
Unassigned	Fr 2/21/03	Fr 2/28/03	0 hrs
Facilities and Participants Booked	Fr 2/21/03	Fr 2/21/03	0 hrs
Caterer and A.V. Support booked	Fr 2/28/03	Fr 2/28/03	0 hrs
Joe	Fr 2/14/03	Fr 2/28/03	88 hrs
Book Speaker & Participants	Fr 2/14/03	Fr 2/21/03	48 hrs
Call Audio Visual Support	Mon 2/24/03	Fr 2/28/03	40 hrs
Fred	Thu 2/6/03	Thu 2/6/03	0 hrs
Topics Settled	Thu 2/6/03	Thu 2/6/03	0 hrs
Sue	Wed 2/12/03	Mon 3/3/03	16 hrs
Book Facilities	Wed 2/12/03	Thu 2/13/03	16 hrs
Conference Date	Mon 3/3/03	Mon 3/3/03	0 hrs
Eric	Wed 2/5/03	Tue 2/25/03	28.38 hrs
Meeting Topics	Wed 2/5/03	Thu 2/6/03	12.38 hrs
Call Caterer	Mon 2/24/03	Tue 2/25/03	16 hrs

Figure 10: Web Page "Who does what" map of the project.

Quick Reference Chart

Adding a Task or Milestone to the Project	<ol style="list-style-type: none"> 1. Click on the first cell in the Tasks column and start typing. 2. Setting Task duration: 3. Click on the corresponding duration cell and move the up/down arrows to determine the amount of time. 4. OR Highlight the amount of time and enter a value through the keyboard.
Create links	<ol style="list-style-type: none"> 1. Highlighting the preceding task, in the sheet pane 2. Hold down the CTRL key 3. Select the following task 4. Click on the links key in the menu
Changing a start date	<ol style="list-style-type: none"> 1. Click on the start cell's drop down triangle. A calendar will open. 2. Select the date in which the task should start.
Change the workweek	Click Tools → change working time
Assign resources	Click on Tools → Assign Resources
Saving as a Html file	<ol style="list-style-type: none"> 1. Click File, Save as Webpage A pop up box will appear. 2. Enter the name of the file, and click save. The export map will appear. 3. Check the appropriate map and click OK

Additional Resources for MS Project

http://www.utexas.edu/its/training/handouts/pdf/proj_getstart.pdf

A brief overview of MS Project.

<http://www.me.umn.edu/courses/me4054/assignments/gantt.html>

A small tutorial on Gantt charts and their elements.

<http://www.microsoft.com/office/project/using/default.asp>

Microsoft support and service for project.

<http://www.bcentral.co.uk/technology/office/tips/project/ProjectTips2.asp>

Hints and Tips using MS Project

You can have MS Project installed in your office for \$38.00 through UIS Tech Support.