

Creating a Gantt Chart in Microsoft Project

Defining the Project

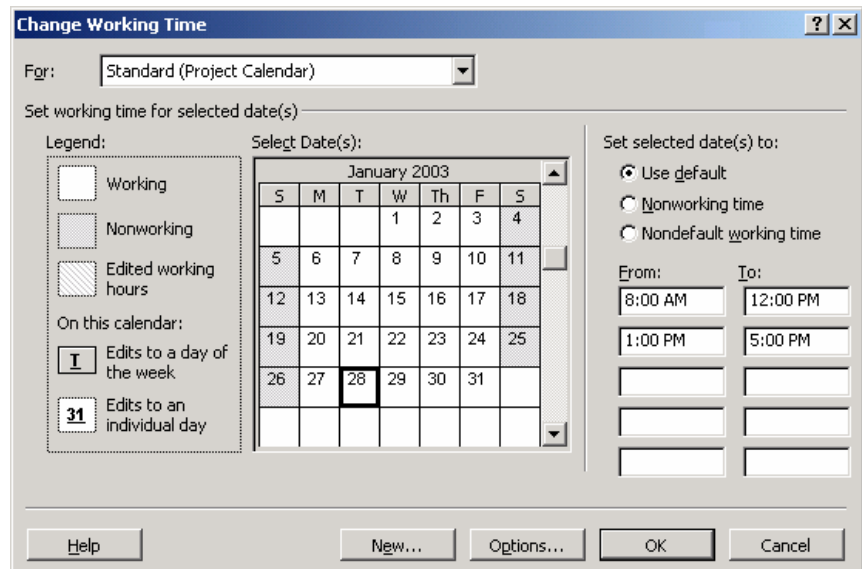
There are three activities you should complete before you begin entering individual project tasks: setting file properties, project working times, and project properties.

Set File Properties

1. Choose File > Properties from the menu to open the Properties dialog box.
2. Enter properties then click OK.

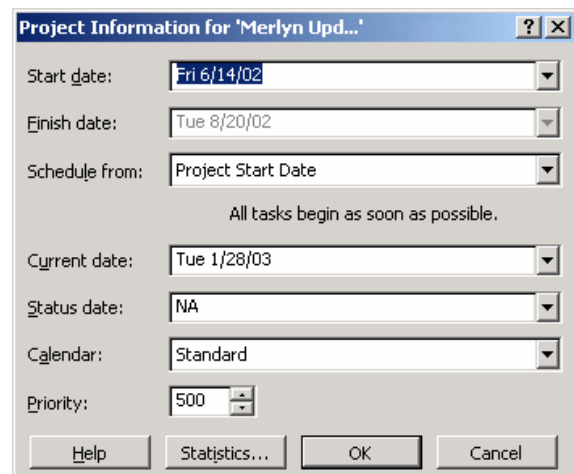
Set Working Time

1. Choose Tools > Change Working Time to open the Change Working Time dialog box.
2. Select the Standard calendar. Set daily working times.
3. If you change the number of working hours, change the Hours Per Day and Hours Per Week calendar options. Click the Options button in the Change Working Times dialog box to jump to the Calendar tab in the Options dialog box.
4. Close both dialog boxes.



Set Project Properties

1. Choose Project > Project Information to open the Project Information dialog box.
2. Set task scheduling method, priority, and calendar.
3. Click OK.



Planning Project Activities

1. Create a list of project tasks.
2. Gather the following:
 - * Resource references (for example: employee and vendor lists)
 - * Estimated costs for resources

Enter Tasks

Either click in the Task Name textbox and enter the task's name OR Double-click in the Task Name textbox to open a Task Information dialog box. Enter the task name on the General tab.

Adjust Column Widths

Point to the right edge of the column header. Drag to manually change the width, or double click to right-size the width to the contents.

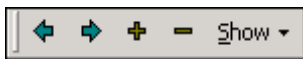
Insert a Column

1. Choose Insert > Column from the menu.
2. Choose the column from the drop down list.
3. Click OK.

Assign Time

Enter either Work or Duration time, but not both. Use the following abbreviations: h (hours), d (days), w (weeks), mo (months)

Outline Tasks



Use the Promote and Demote buttons on the Formatting toolbar to outline selected tasks.

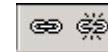
Enter a Milestone

1. Enter the milestone as a task.
2. Set the task Duration to zero (0) OR mark the task as a milestone on the Advanced tab of the Task Information dialog box.

	Task Name
1	Sources – Access
2	Add Core List Coding
3	Remove Domain Drop-Down List
4	Communication
5	Populate Program Area in Sources & N.T.
6	Graphics & SQL Server Table Updates
7	Merlyn – Intranet
8	Convert 15 Merlyn web pages
9	Create 1 new Merlyn Web Page
10	VBA to VBScript conversion & installation
11	New VBScript code for Core List, Emails & Commit w/Comments
12	Modify Subject & Org Type to only display assigned codes
13	Sources – Intranet
14	Make above changes to Sources on the Intranet
15	Merlyn – Access
16	Make above changes to Merlyn in Access

Set Task Relationships

1. To link tasks, hold Ctrl and select, in order, the tasks you want to link OR hold Shift and click to select consecutive tasks.
2. Click the Link Tasks button on the Standard toolbar.



To unlink previously linked tasks, select the linked tasks and then click the Unlink Tasks button on the Standard toolbar.

Build in Lag

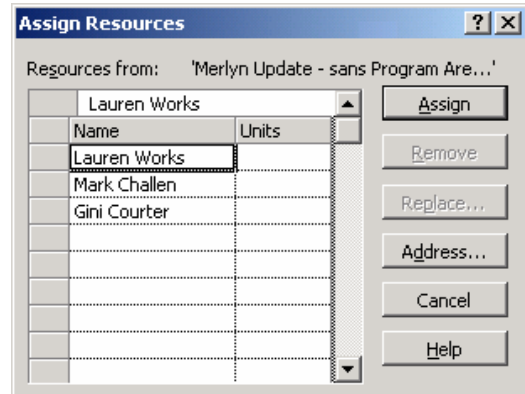
1. Double-click the link line in the Gantt Chart.
2. Set the lag value in the Task Dependency dialog box

Entering Resource Information

1. Choose View > Resource Sheet to open your project's resource sheet.
2. Double-click in any cell of the resource sheet to open a Resource Information dialog box.
3. Enter the following for each resource: resource name, type (work or material), material label (for example tons, feet, or cubic yards), initials (displayed in Gantt Charts and reports), maximum units (percentage or value), standard and overtime rates, cost per use, accrual method, base calendar, and an optional resource code you can use later for sorting and grouping.
4. Click OK.

Assign Resources to Tasks

1. Switch to the Gantt Chart view (View > Gantt Chart), and select a task.
2. Click the Resources button on the Standard toolbar to open the Assign Resources dialog box.
3. Shift-click, or hold Ctrl and click to select resources for the task, and then click the Assign button to assign the resources to the task.
4. If a resource is assigned at less than 100%, adjust its maximum units in the resource sheet is less than 100%. If you want to have the resource work half-time on the task, change the percentage in the Units Assigned column.



When you assign materials, enter the number of units required in the Units Assigned column.

The Assign Resources dialog box remains open so you can move back to the grid, select one or more tasks in the task grid, and assign resources.

Estimating Project Costs

There are two types of costs associated with a project or a project task: variable costs and fixed costs. The variable costs should already be accounted for in the hourly costs, overtime costs, and per-use costs of work resources and materials assigned to tasks. You can add fixed costs to specific tasks.

1. In Gantt Chart view, choose View > Table > Cost to display the Cost Table.
2. Drag the vertical split bar that runs between the table and the Gantt Chart to display all the columns of the Cost Table.
3. Enter the fixed cost associated with a specific task or summary task in the Fixed Cost column.

Printing Views

To print the Gantt Chart or any other view:

1. Use the View menu to display the view.
2. Choose the data you want to display by selecting a table (View > Table).
3. Adjust the columns and position the timeline.

The Gantt Chart prints with the timescale displayed. You may want to print a more condensed timescale, either because your project spans a number of months or the audience for the printout needs only summary data. To change the timescale, right-click the timescale at the top of the chart and choose Timescale from the shortcut menu, or choose Format > Timescale from the menu.

Click the Print button on the Standard toolbar to print the view as it appears. To set a range of dates or print multiple copies, choose File > Print from the Menu bar to open the Print dialog box.

For more information on Project, or to order the 60-day Project Evaluation Kit, visit the Microsoft web site: <http://www.microsoft.com/office/project/default.asp>

Visit our web site for materials and links from this session:
www.triadconsulting.com/events/iaap.htm

Project Management Web Resources

Project Management Institute

PMI® is the self proclaimed leading nonprofit professional association in the area of Project Management.

<http://www.pmi.org>

Project Management Forum

Another nonprofit site with a more academic focus. Contains a library with links to journal articles and other resources related to the field of project management. Information on certification, training, standards and other PM organizations. Includes a project management Web ring, chat rooms and lists.

<http://www.pmforum.org>

Project Manager's Control Tower

Accredited by Colorado State University, this site's main focus is online training and development for project managers. Several different courses are offered, with links to articles, project management tools and other resources.

<http://www.4pm.com>

Project Manager's Resource Center

General information site with links to discussion forums and special interest groups.

<http://www.allpm.com>

Guide to Project Management Research Sites

Web index to PM research organizations, professional associations, consultants and other links.

<http://www.fek.umu.se/irnop/projweb.html>

Microsoft Project Users Group

An independently formed, Microsoft supported forum for MS Project users.

<http://www.mpug.org>

Project Management Times

PM Times is an independent publication covering news, views, current issues and job opportunities, designed for those involved in project management within all sectors of industry and business.

<http://www.pmtimes.co.uk/>

Association of Project Managers

The Association of Project Managers is a UK based organization dedicated to advancing the science of project management and professional development of project managers and specialists.

<http://www.apmgroup.co.uk>
