

Using Microsoft Project

Annette Marquis
Gini Courter
TRIAD Consulting LLC



What is a Project?

Not just any job, but a job with

- A beginning and end (timeline)
- Specified outcome (scope)
- Stated level of quality (performance)
- Budget (costs)

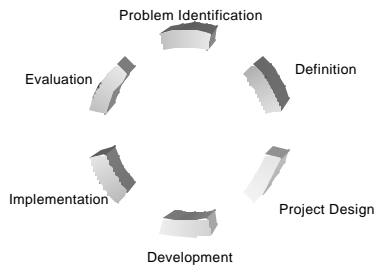


Project Examples

- | NOT PROJECTS | PROJECTS |
|--|--|
| <ul style="list-style-type: none">• Processing payroll• Delivering training• Hiring staff• Student discipline• Lunch | <ul style="list-style-type: none">• Moving offices• Developing a new curricula or course• Preparing for North Central• Developing an intranet |



The Project Cycle



Project Tasks



- Defining and planning the project
- **Entering task, resource and cost information**
- Optimizing the plan
- Communicating with stakeholders
- Tracking and managing the project
- Closing the project

Getting Ready



- Set file properties
- Establish working times
- Set project properties

File Properties

1. Choose File > Properties
2. Enter Title, Author, Manager
3. Click OK



Working Times

1. Choose Tools > Change Working Time.
2. Select the Standard calendar
3. Click Options to change the hours per day.



Setting Hours Per Day

- Hours per day used to convert days to hours
- Must agree with Calendar



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



- Tasks:
 - List all tasks, or plan higher level now and lower levels later
 - List in order if possible
- Resources:
 - People and materials
- Costs:
 - for all resources

Parts of a Task



- Task name/description
- Task duration or work
- Task notes



Enter Tasks



- Enter tasks in the Gantt Chart or the Task Information dialog box
- Double click the task to open the dialog box
- Enter in order when possible

Task Name	Duration	Start
1. Conduct final stakeholder meetings	1 day	
2. High School start	1 day	
3. Middle School start	1 day	
4. Upper El start	1 day	
5. Lower El start	1 day	
6. Pre primary start	1 day	
7. Maintenance start	1 day	
8. Support start	1 day	
9. Water Resources	1 day	
10. Design hierarchy	1 day	

Inserting and Deleting Tasks



- To insert a task:
 - Right click where you want to insert the task
 - Choose New Task from shortcut menu
- To delete a task:
 - Select the task
 - Right click and choose Delete OR press the Delete key on your keyboard

Entering Time



- Enter either Duration or Work
- Project is designed to enter Duration
- Work is often a better measure

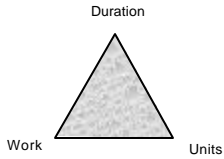
Duration and Work



Work/Units = Duration

32 hours of painting/4 painters = 8 hours

32 hours of painting/2 painters = 16 hours



Inserting a Column



1. Click in column to left of new column
2. Choose Insert > Column from menu
3. Select column (Work)
4. Click OK



Enter Duration or Work



- Click in the column and enter a number:
 - h for hours
 - d for days
 - m for minutes
 - w for weeks
 - mo for months
- Enter duration or work, not both
- Don't worry about time between tasks

Milestones



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.

Outlining Tasks



- ✦ Use the Promote and Demote buttons to arrange tasks and subtasks
- ✦



Types of Task Relationships



- Finish-to-Start: (the default): task A must be finished before task B can start.
- Start-to-Start: task A must start before task B can start.
- Finish-to-Finish: task A must finish before task B finishes.
- Start-to-Finish: task A must be started before task B can be completed.

Setting Relationships



1. Select the first task
2. Hold Ctrl or Shift and select the next task(s)
3. Click the Link Tasks button to link tasks.

4. Click Unlink Tasks to remove links.


Adding Lag



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



Adding Resources to a Project



1. Choose View > Resource Sheet or click the Resource Sheet button to open the project resource sheet
2. For each resource, enter
 - name
 - type
 - initials
 - maximum units
 - rates
 - calendar

Assigning Resources to Tasks



1. Open the Gantt Chart
2. Select one or more tasks



3. Click the Assign Resources button to open the Assign Resources dialog box

Assigning Resources to Tasks



4. Select resources
5. Set % of use
6. Click Assign



Printing a Chart



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.
4. Choose File > Print to open the Print dialog box.
