Project Management

Session 4- Microsoft Project 2007 Tutorial

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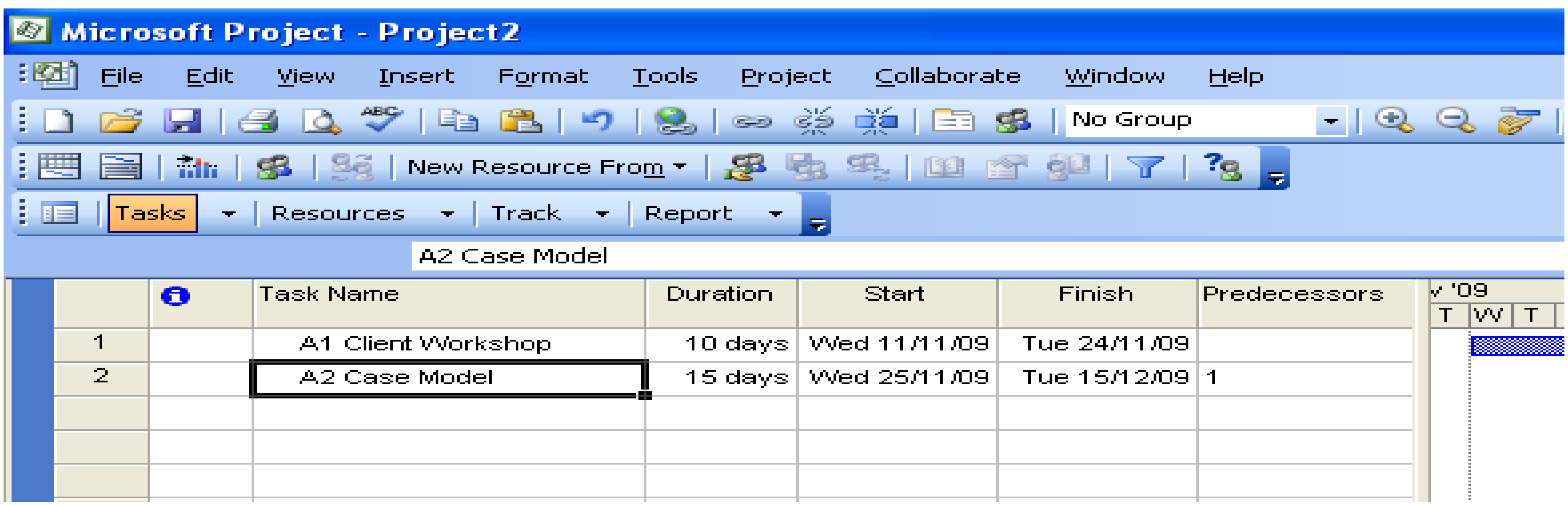
Project Activities

ID	TASK NAME	DURATION	PREDECESSORS
1	A1 CLIENT WORKSHOP	10	-
2	A2 CASE MODEL	15	1
3	A3 USER REVIEW	10	2
4	B1 Db DEFINITION	10	2 FS + 5 days
5	B2 FORMS DESIGN	20	4
6	B3 REPORT DESIGN	5	3,5
7	C1 SYSTEM TESTING	20	5
8	C2 HANDOVER TO CLIENT	5	6,7

Using MS Project

- On each row enter:
  - Task Name
  - Duration and
  - Predecessor
  - Leave out Start Date and Finish Date for now



Entering a Start Date

- Go to ***Project menu***
- Select ***Project Information***
- Top left hand corner you will see:
  - Project Start Date
  - Project Finish Date
  - Schedule from

    (default is Project Start Date, but you can actually work backwards given a constraint of a finish date)

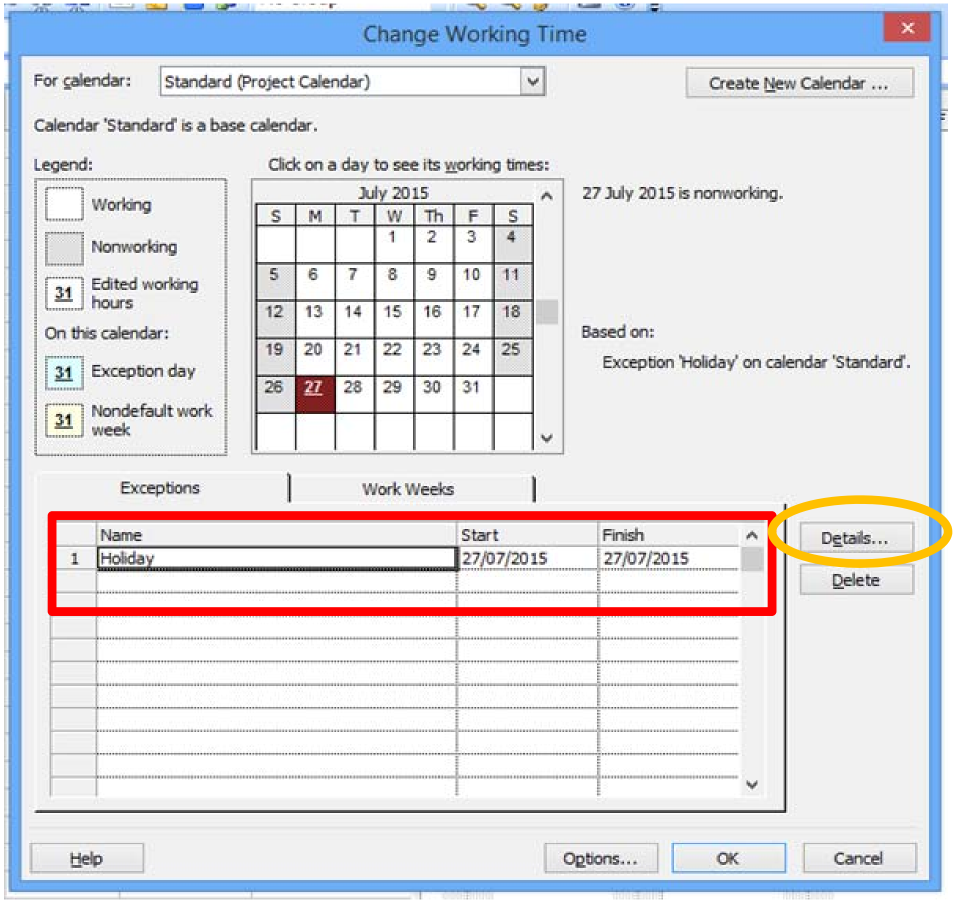
- Click on the Pull down menu
- Scroll to your month and year
- Choose date: 03rd March 2014
- Click on OK to the bottom of the dialogue box

Adding Project Summary Task

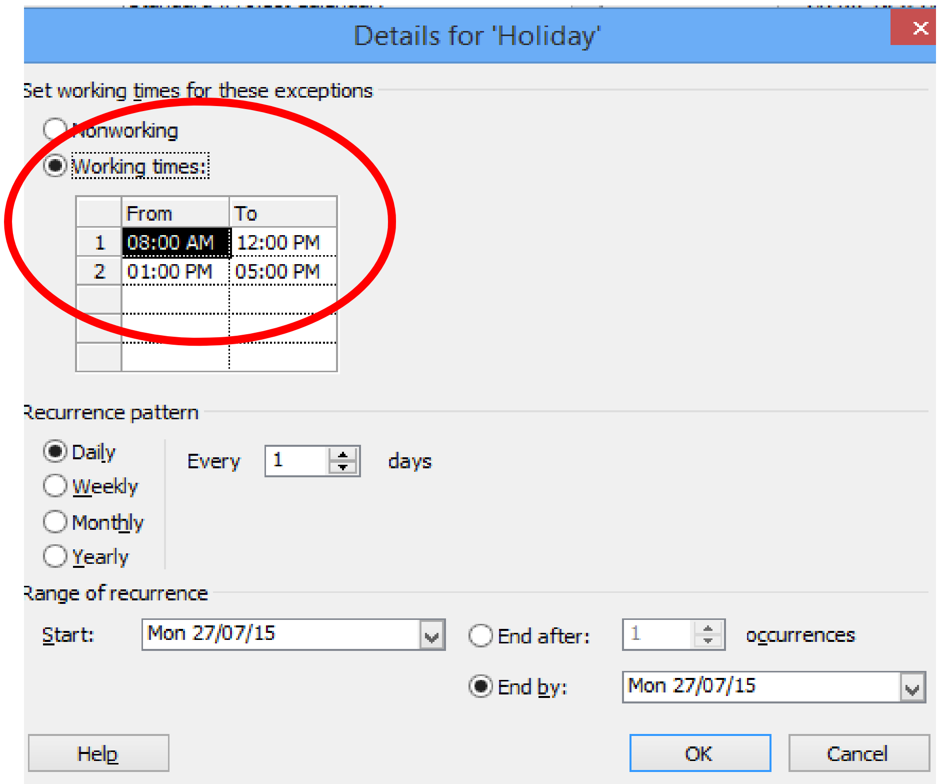
- Go to ***Tools menu***
- Select ***Options***
- On the ***View Tab***
- Check the box ***Show Project Summary Task***
  - Bottom right corner

Changing Working Time

- This can be used to set either
  - Nonworking time e.g. holidays
  - Additional Working time e.g. Saturday and Sunday
  - To adjust working hours
- Go to ***Tools Menu***
- Select ***Change Working Time***
- Select the Date from the Calendar
- On the **Exceptions Tab** type in a name of the exception e.g. Bank Holiday or Overtime
- Click on the Start cell to Set date that was selected.

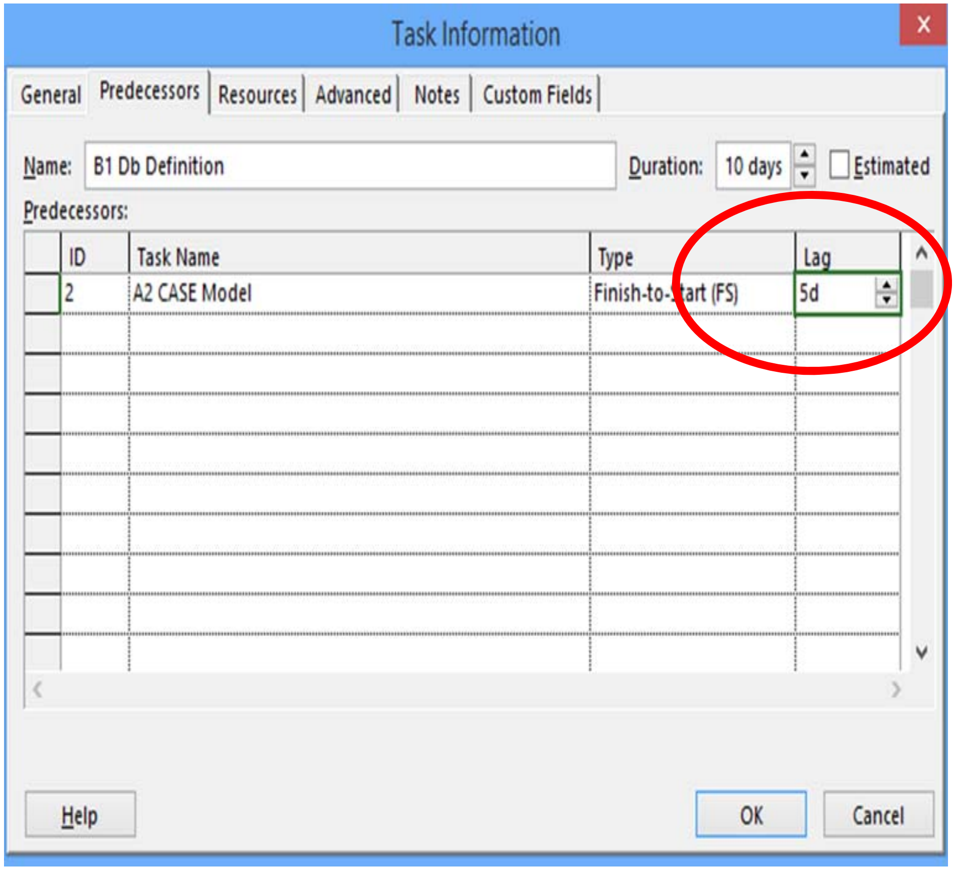


- By default this date is set as Non Working Time.
- To set **Additional Working time**
  - Click on the details button
  - Select the Working Times Radio button
  - You can also adjust the Hours of Work in the table below
  - You can also set a recurrence pattern



Setting Lead or Lag on Tasks

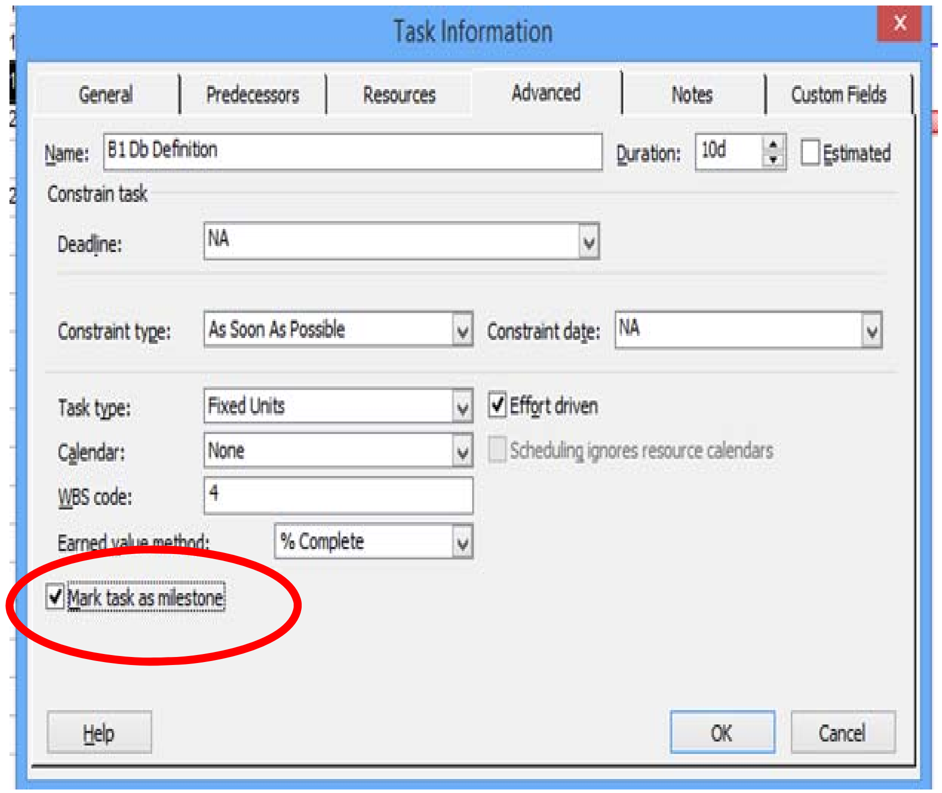
- Double click on the Task to view Task Information Dialogue
- Select the ***Predecessor Tab***
- In the ***Lag*** column enter the number of days required
- NB. Positive is Lag
  Negative is Lead



Setting Milestones

- This can be done two ways

1. Enter the duration of the task as zero (0) days.
2. **Double Click *on the task*** you want to set as a milestone
   – Go to ***Advance tab***
   – ***Check box*** Mark Task as a Mile stone
   – Click ***OK***

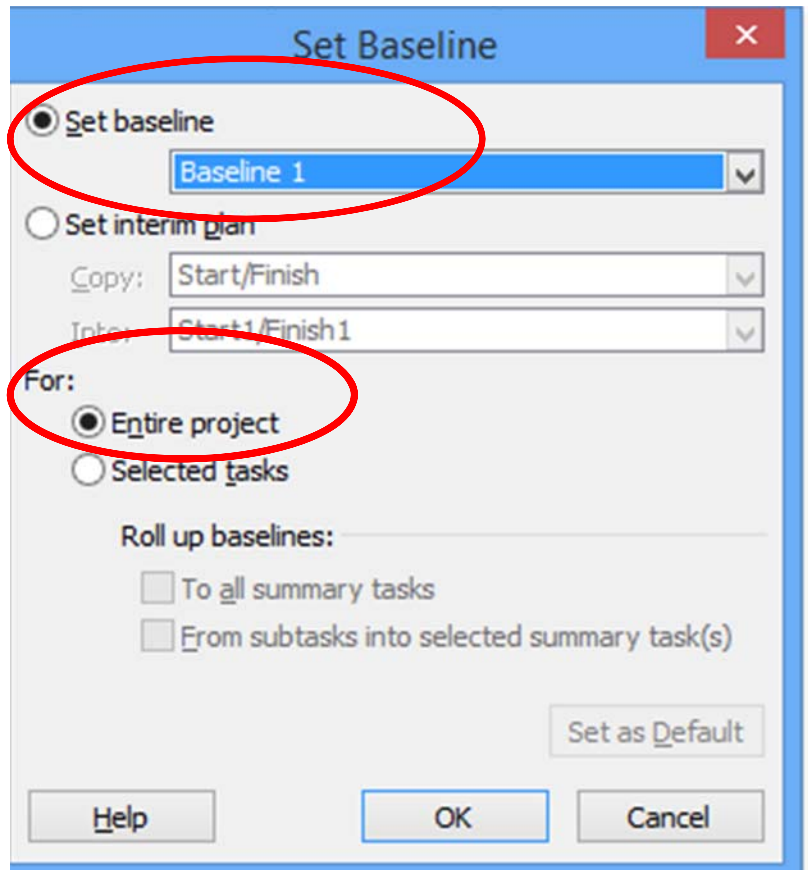


Formatting the bars to show Critical Tasks

- Go to ***Format menu***
- Select ***Bar Styles***
- Scroll to end of table and on a new row
  - Enter Critical in *'Name column*'
  - Use drop down menu in the *'Show For column'* select **critical**
- Click on ***Bars Tab***
- In middle section change '*Color'* to red
- Click OK

Setting Baselines

- You should set baselines in order to keep track of the project plan as work progresses.
- Go to ***Tools Menu***
- ***Select Tracking*** then ***Set Baseline***
- Using drop down menu Change to ***Baseline 1***
- For ***Entire Project***

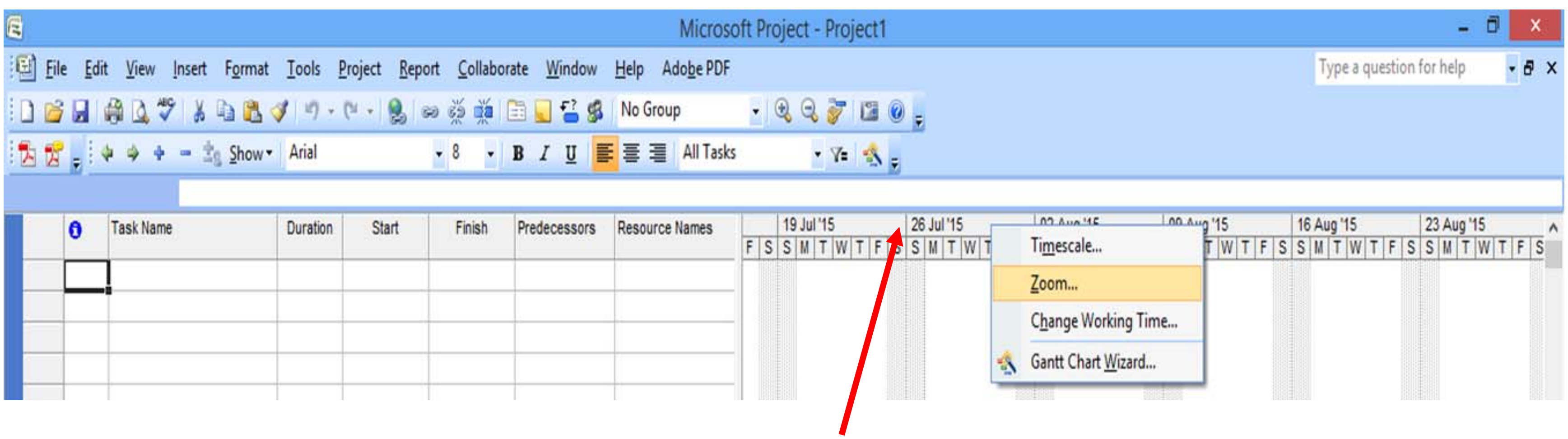


Inserting a New Column

- Insert a column to display the baseline details e.g. Finish dates for each tasks
- **Right click** on the column heading that you want the new column to go next to
- Select **Insert Column**
- In the *Column Definition Box*, change the **Field Name** from *ID* to the name of the new field you want
- Use the drop down menu to choose from the list provided.
- Commonly used fields are:
  - Fixed Cost, Cost
  - Total Slack, Free Slack
  - Baseline 1 Finish, Baseline 1 Duration

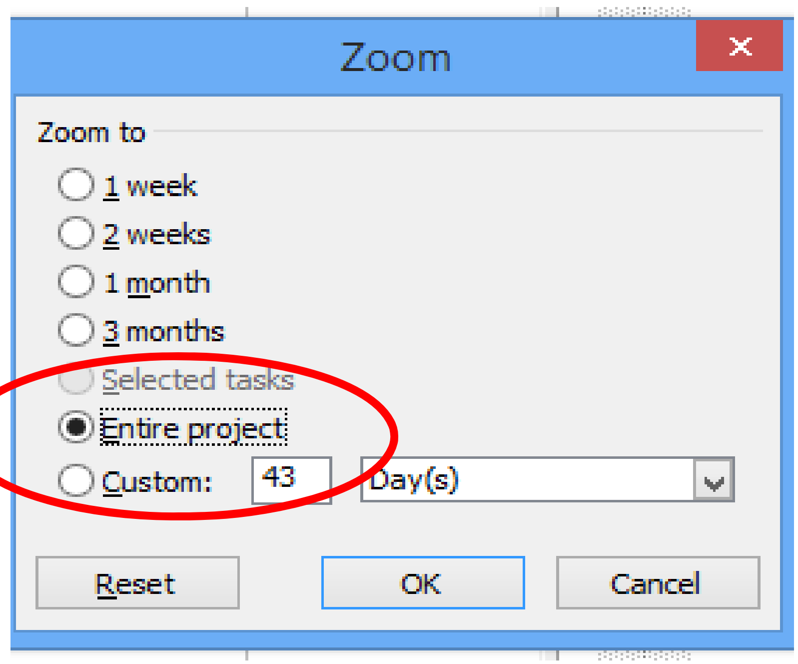
Adjusting Zoom in the Gantt Chart

- In order to view the entire Chart with scrolling you can zoom the Gantt charts bars
- **Right Click** on the ***Timeline bar*** to the top
- Select ***Zoom***



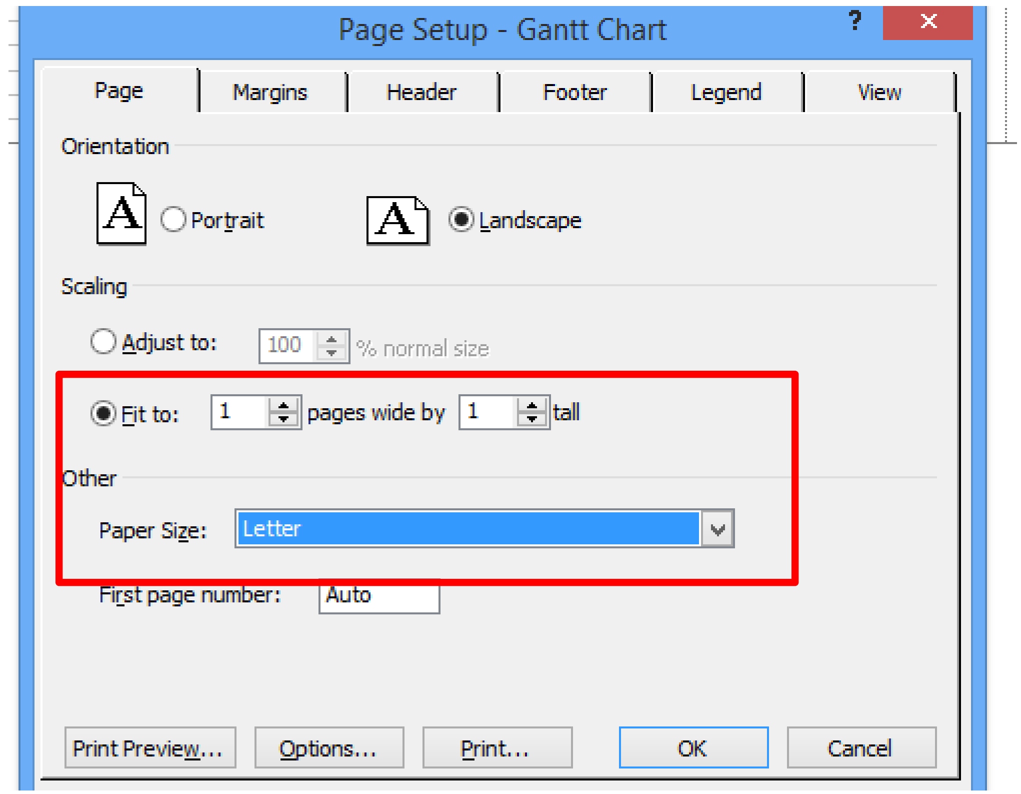
Timeline Bar

- Then Select ***Entire Project***
- Click ***OK***



Printing the Gantt Chart

- Go to ***File Menu*** Select ***Print Preview***
- Click on ***Page Setup***
- Change the Scaling by selecting ***Fit to** 1 page wide by 1 page tall*
- Click ***OK***
- Click ***Print***



Resource Allocation

ID	TASK NAME	Resources
1	A1 CLIENT WORKSHOP	SA [2], PG[0]
2	A2 CASE MODEL	SA[1], PG[0]
3	A3 USER REVIEW	SA[3], PG[1]
4	B1 Db DEFINITION	SA[2], PG[2]
5	B2 FORMS DESIGN	SA[0], PG[3]
6	B3 REPORT DESIGN	SA[1], PG[3]
7	C1 SYSTEM TESTING	SA[2], PG[2]
8	C2 HANDOVER TO CLIENT	SA[2],PG[1]

RATES: SA- $400.00/DAY

PG- $300.00/DAY

Adding resources for a task

- Double click on the first task
- Select the **Resources Tab** from the Task Information Dialogue Box
- Under **Resource Name** column type in the name of the resource to be used. Eg. Systems Analyst
- Under **Units** enter the number of resources required. 100%=1 person
- Repeat for use of more than one resource for a task

Repeat for each task

- Repeat the previous procedure for each task
- Remember once you have entered a resource once, there is no need to type it again, just use the drop down menu in the **Resource Name** column to select the resource.
- Remember to be consistent. Don’t enter SA, sa, Sa to mean the same, because they are in fact different resource as they are spelt differently.

Entering the Rates for Resources

- Go to **View** menu
- Select **Resource Sheet**
- Enter the rates in the **Std. Rate** column for the respective resource
- Be sure to put in the time factor, **$/day** (per day), **$/hr** (per hour)
- If there are unwanted resource you can delete by right clicking on the **ID number** of the resource in question and select **Delete Resource.**

Generating Reports MS Project 2003

- Go to **View** menu
- Select **Reports**
- Click on the Category e.g. **Costs**
- Click on *Select*
- Click on the type e.g. **Budget**
- Choose *Select*

Generating Reports MS Project 2007

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- Click on the type e.g. **Budget**
- Choose *Select*

Work Completed as at 15 May 2009

ID	TASK NAME	% Complete
1	A1 CLIENT WORKSHOP	100 %
2	A2 CASE MODEL	60%
3	A3 USER REVIEW	100%
4	B1 Db DEFINITION	40%
5	B2 FORMS DESIGN	80%
6	B3 REPORT DESIGN	0%
7	C1 SYSTEM TESTING	0%
8	C2 HANDOVER TO CLIENT	0%

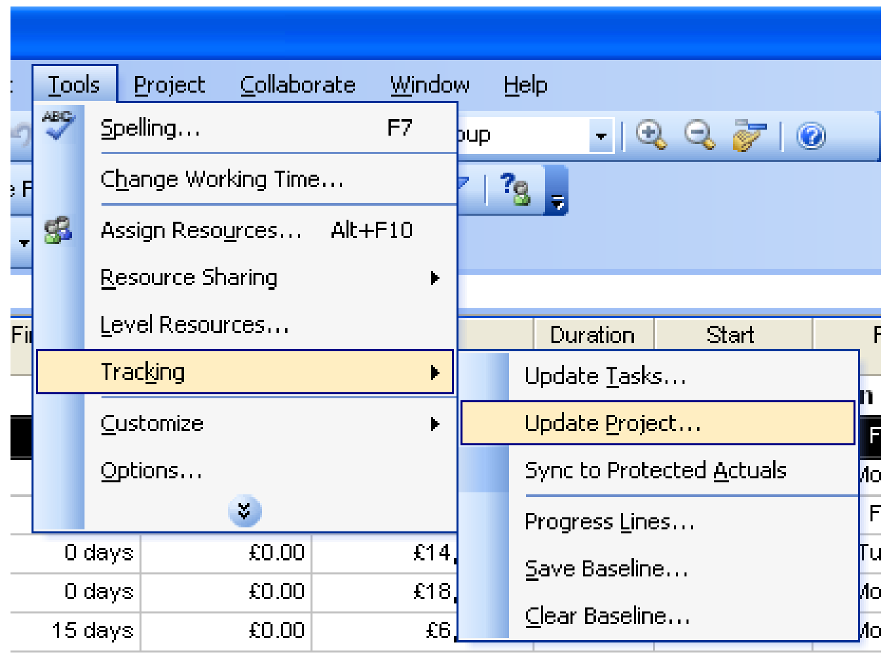
Reschedule Finish Date: 15th May 2010

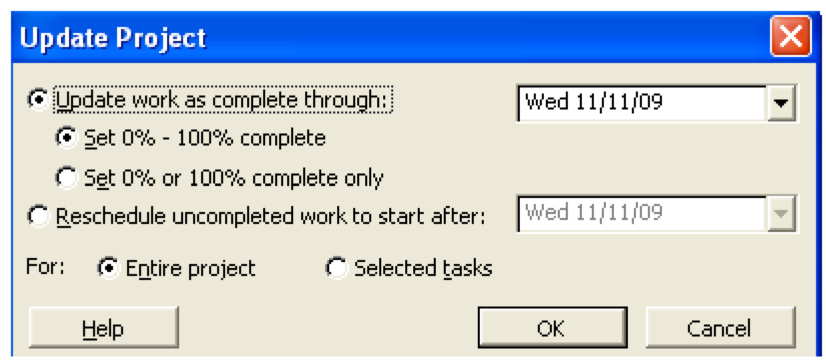
Adding Work Completed for a task

- Double click on the first task
- Select the **General Tab** from the Task Information Dialogue Box
- Enter the % complete in the **Percentage Complete** Box
- Repeat for each task

Rescheduling Uncompleted Work to start after a particular date

- Go to **Tools** menu
- Select **Tracking** then **Update Project**
- On the Update Project dialogue box select **Reschedule uncompleted work to start after**
- Enter date using drop down menu 15th May 2009
- Select **entire project**
- Click on **OK**





- Look at the last task on the Gantt chart you will see the new finish date
- Notice on the blue bars of the task that were uncompleted but should have been completed to date, are now split using……… to show that we have reschedule to uncompleted work to start after a certain date

Viewing Project Statistics

- Go to **Project** menu
- Select **Project information**
- Click on the **Statistics** button to the bottom left corner
- The Statistics dialogue box shows a summary of the project