Introduction to MS Project®

Microsoft Project is:

A powerful software tool that helps you apply project management concepts to complete projects within the defined time and budget.

Preferred version for this course: MS Project 2019®

Microsoft Project Upsides:

- Allows project scheduling
- It allows you to control the progress of your projects
- It allows you to control the finances of your projects
- Facilitates resource management
- Facilitates the communication of the progress of your projects
- Improve productivity

Screen features - MS Project®

The Project 2019 interface uses the standards that Microsoft Office applications have as of version 2007.

The main elements of it are described below.

Ribbon's tabs: It presents the different commands of MS Project, grouping them into tabs and logical groups.

Buttons: bring your favorite commands into the open by showing multiple commands grouped in specific categories

Table area: part of workspace displaying data in tabular format.

Screen features - MS Project®

Gantt Chart Area: Workspace area that displays project activities in the form of a Gantt Chart.

Time scale: Indicates the time period reflected on the Gantt Chart.

Scrollbars: Allows horizontal and vertical navigation in data areas.

View on MS Project®

Project has a wide variety of views, which are different ways of viewing project information.

The view selected by default when creating a project is called **Gantt Chart**, which includes an area with a table and a graphical area that shows the **chart** associated with the data included in the table.

With this view we will work initially.

More Views on MS Project®

Views are grouped into different types:

- Task Views

    Show information related to tasks

- Resource Views

    They show information about resources

- Assignment Views

    They show information regarding the allocation
    of resources to tasks or vice versa

Overview of Project Views

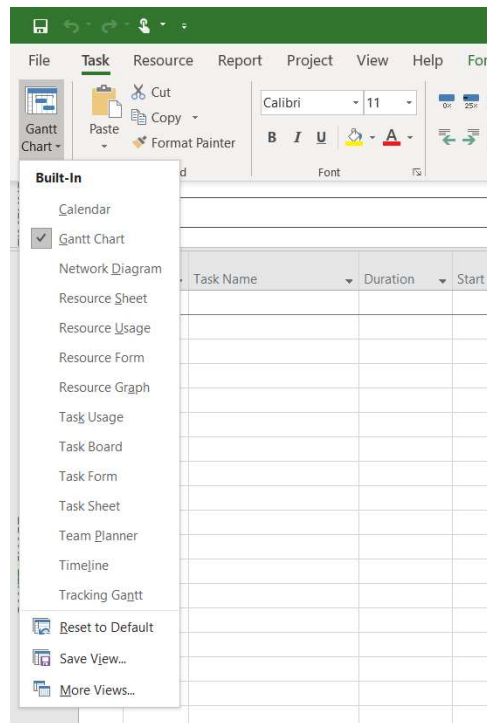The list of views can be accessed in the "TASK" and "RESOURCE" tabs.

When using the views in Project, decide what information you want to see (task, resource, or assignment data), and then decide what format you want to use. This helps you identify which view will best suit your needs.

Task on Ribbon
- Gantt Chart√
- More Views

Resource on Ribbon
- Team Planner√
- More Views

Resource on Ribbon
- Other Views√
- More Views
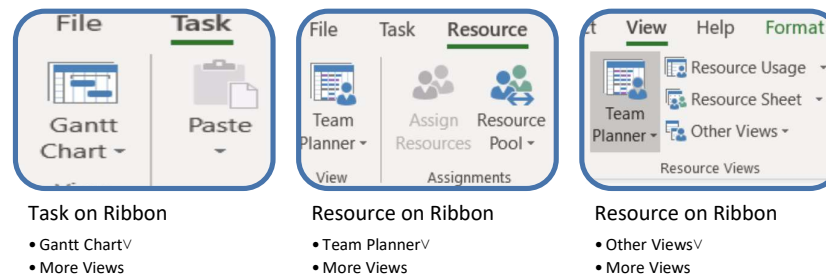
Overview of Project Views

Click on each of the views to display in the workspace
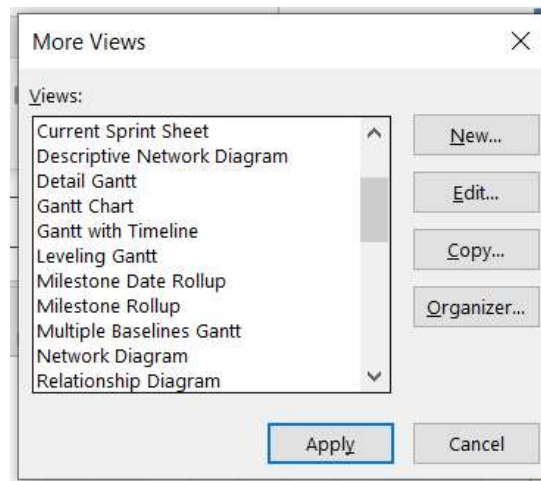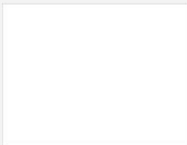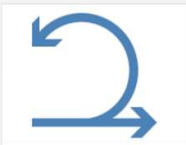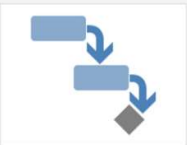
Start a New Project

Start a New Project

Upon launching the app, Project will take you to a project search hub where you can:
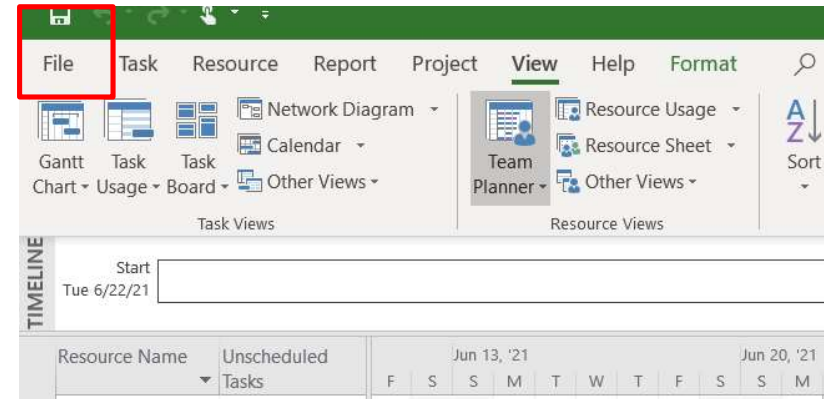
- Select a recently opened file
- Create a blank project
- Select a template
- Find a template online
- Find a project in other sources (computer, OneDrive, etc.)

Start a New Project

Start the project by entering project information.

To initialize the basic properties of the project select

- **File**
- **Info**
- **Project Information**
- **Properties Advanced**

Info

Copy path

Project Web App Accounts
You're not connected to Project Web App

Manage Accounts

Organize Global Template
Move views, reports, and other elements between project files and the global template.

Organizer

Project Information ▾

Start Date	Today
Finish Date	Today
Schedule from	Start
Current Date	Today
Status Date	Today
Project Calendar	Standard
Priority	500

Home
New
Open
Info
Save
Save As
Print
Share
Export
Close

Project Information ▾

Advanced Properties
View advanced and custom properties of this project.

Project Statistics
See key statistics related to your project.

Priority   500

Project1 Properties   ?   ✕

General Summary Statistics Contents Custom

Title: Project1

Subject:

Author: Brenes, Carlos

Manager:

Company:

Category:

Keywords:

Comments:

Hyperlink base:

Template:

☐ Save preview picture

OK   Cancel

Start a New Project

Description of Properties fields:

- **Title:** Shows the file name by default. Corresponds to the title of the project.
- **Subject:** Reference that describes what the project is about.
- **Author:** Name of the document's author.
- **Administrator:** Name of the Project Manager.
- **Organization:** Name of the organization where the project is implemented.

Enable the Project Summary Task

- To view summary information for the project, display the summary task.

- To enable this option, you must first position yourself in forma t (Ribbon men)

- Check that the task identification number in the left column is 0 (zero).

Project start or end date

Depending on the characteristics of the project, it is scheduled from a start date (forward) or from an end date (backward).
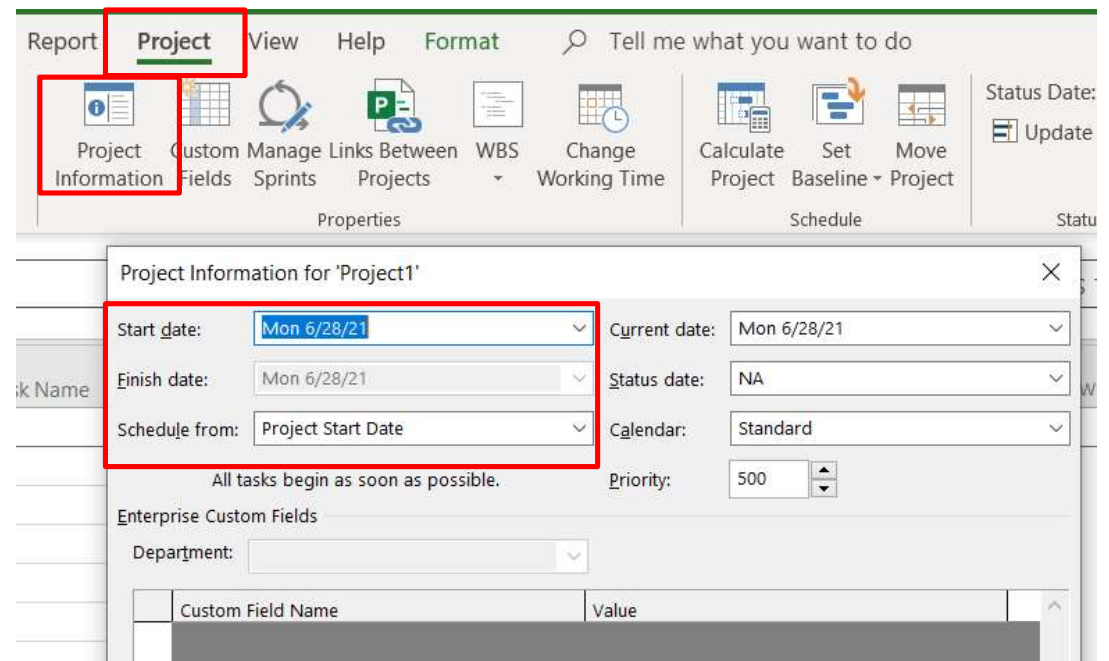
Scheduling from an end date is used when there is a deadline that cannot be exceeded.

Project start or end date

To indicate the start or end date of the project

- **Project**
- **Project Information**
- Select Schedule from:
  - **Start Date or Finish Date**
  - Select a Date from Calendar or type the required date

Project start or end date

Task creation

A project is divided into phases that represent deliverables, which are developed by project tasks. These tasks can be made up of subtasks.
Once you have developed your WBS (Work Breakdown Structure) you can type it.

Use the input table in the Gantt Chart view to type in the tasks.

- **Enter the names of the phases and tasks starting from the first line in the "Task name" column.**

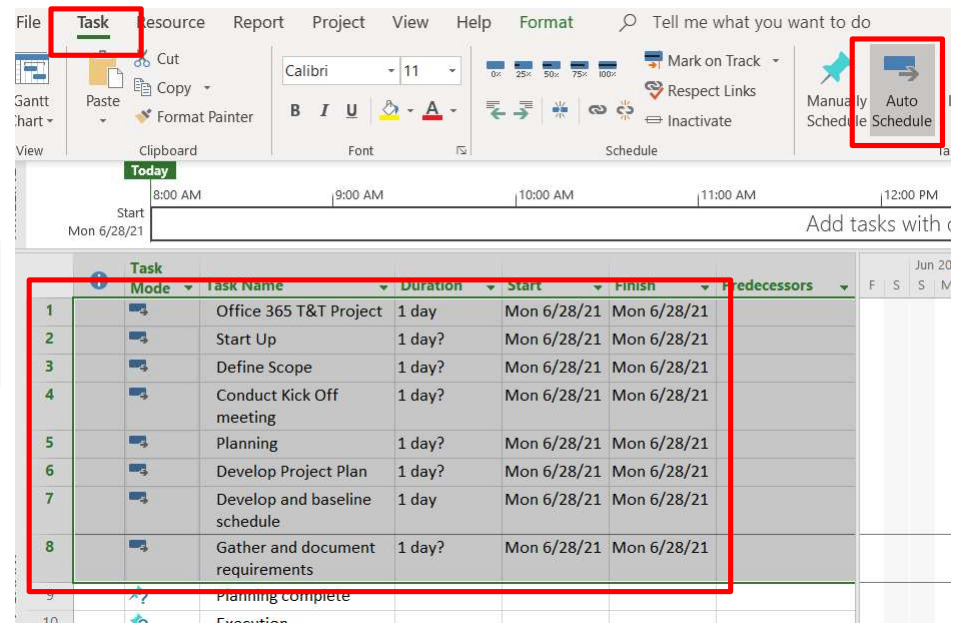Type the phases and tasks included in the following image:
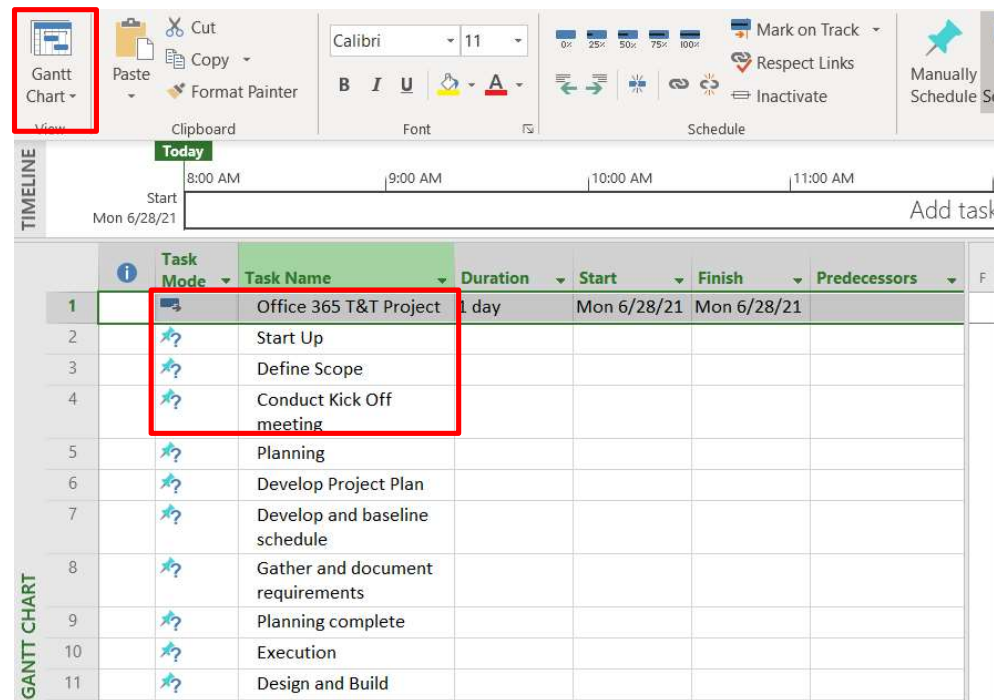
Task Duration

MS Project has configured by default the manual scheduling of tasks. As can be seen in the previous example, no duration is assigned to the tasks that are typed.

| To perform an automatic schedule | • Select the needed Tasks
• **Task**
• **Auto Schedule** |

Task Duration

Project when auto-schedule adjusts the value in the "Task mode" column and sets by default a duration corresponding to one day when creating a task.

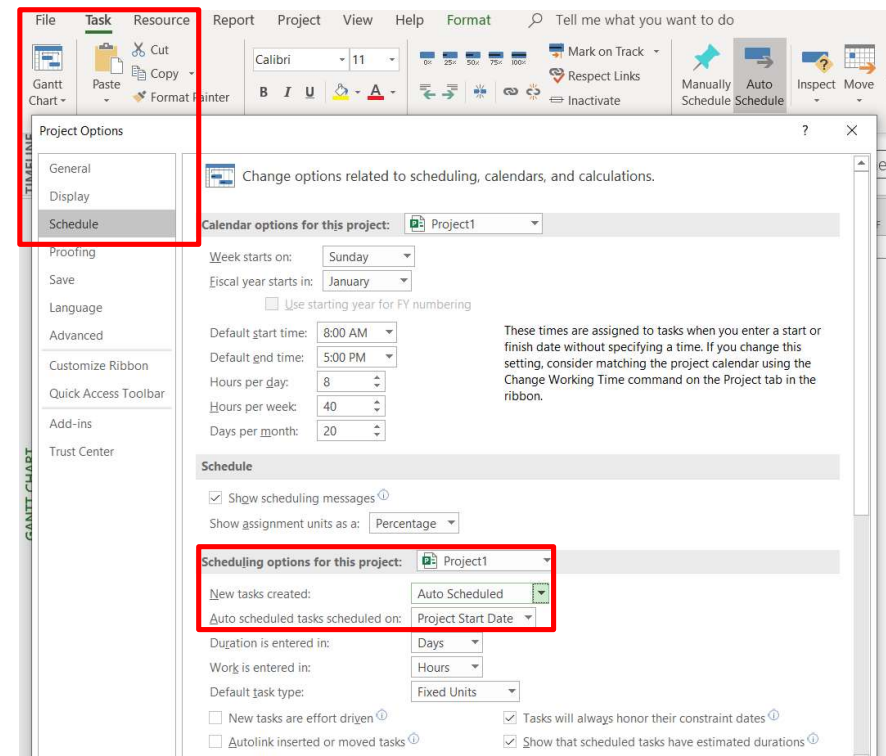Note that the duration includes a question mark at the end.

Task Duration

To perform an automatic schedule for all new tasks by default, select

To perform an automatic schedule for all new tasks by default	• File • **Options** • **Schedule** • **Net tasks created** • **Auto Schedules**

Task Duration

In Project, you can record the duration of tasks in different time units: minutes (m), hours (h), days (d), weeks (s), and months (ms). When typing durations, type the numeric value followed by the abbreviation for the duration (shown above in parentheses) and then press <Enter>.

Task Duration

Enter the durations shown for the tasks marked in the following image:

	Task Mode	Task Name	Duration	Start	Finish	Pr
ⓘ						
		Office 365 T&T Project	1 day	Mon 6/28/21	Mon 6/28/21	
		Start Up	1 day?	Mon 6/28/21	Mon 6/28/21	
		Define Scope	5 days	Mon 6/28/21	Fri 7/2/21	
		Conduct Kick Off meeting	0 days	Mon 6/28/21	Mon 6/28/21	
		◢ **Planning**	**10 days**	**Mon 6/28/21**	**Fri 7/9/21**	
		Develop Project Plan	10 days	Mon 6/28/21	Fri 7/9/21	
		Develop and baseline schedule	5 days	Mon 6/28/21	Fri 7/2/21	
		Gather and document requirements	5 days	Mon 6/28/21	Fri 7/2/21	

Now Check: There are changes on the Gantt Chart, in the duration shown in the summary task, the modified durations are left without a question mark and the end dates are adjusted.

Task Duration

The duration of a task corresponds to the time required to execute it.

The duration of the SUMMARY TASK corresponds to the time necessary to fulfill all the tasks of the project.

Both values generally considered in business days.

Task Duration Types

Estimated: the recorded duration is considered an unreliable estimate. This type of duration comes by default and is identified by a question mark (?).

Specific: the recorded duration is considered a very good estimate of what the actual duration of the task will be. If it is not estimated, it is considered specific.

Task Duration Types

To modify the type of duration of the task

- Double click on the task
- Select the tab "General" or "Advanced" in the window
- Task information" and check \ uncheck the "Estimated" box

Task Information   ✕

| General | Predecessors | Resources | Advanced | Notes | Custom Fields |

Name: Define Scope   Duration: 5d? ☑ Estimated

Percent complete: 0%   Priority: 500

Schedule Mode: ○ Manually Scheduled   ☐ Inactive
                ● Auto Scheduled

Dates

Start: Mon 6/28/21   Finish: Fri 7/2/21

Modify Default Time Unit

The default time unit (days) that Project uses, when typing in task durations and to display summary task durations, can be modified.
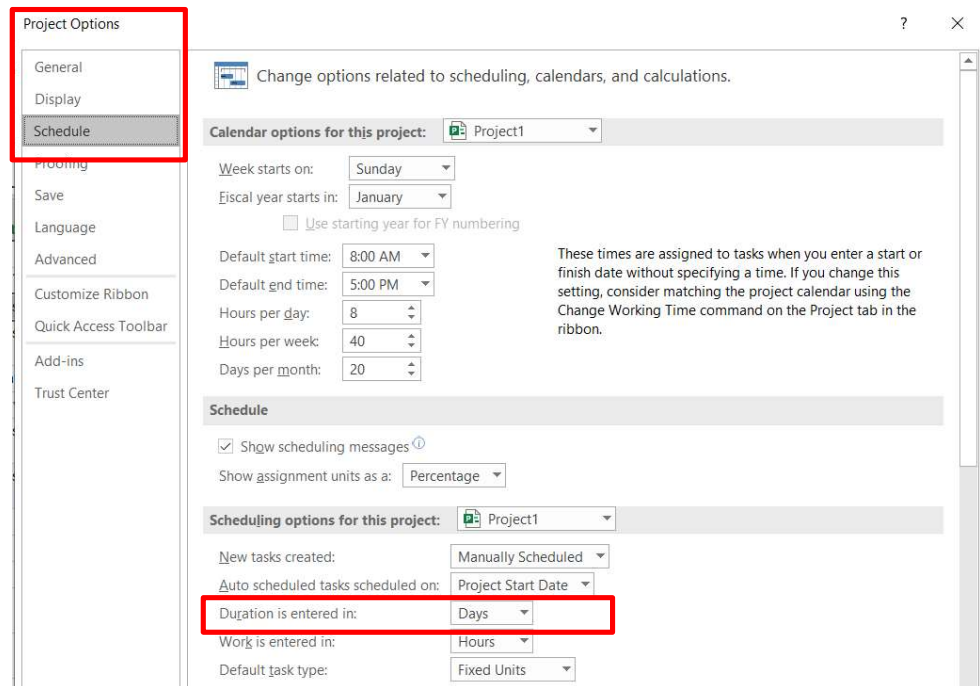Modifying this value does not affect the time units of the previously entered durations.

Modify Default Time Unit

To Modify Default Time Unit

- Select File
- Project Options
- Schedule
- Duration entered on: You can select Minutes, Hours, Days, Weeks or Months

Subtask creation

The Work Breakdown Structure (WBS) has a Phase \ Tasks structure or schema that is not yet reflected in Project.

	⊿ **Office 365 T&T Project**	**10 days**	**Mon 6/28/21**	**Fri 7/9/21**	
	⊿ **Phase 1 Planning**	**10 days**	**Mon 6/28/21**	**Fri 7/9/21**	
	Develop Project Plai	10 days	Mon 6/28/21	Fri 7/9/21	
	Develop and baseline schedule	5 days	Mon 6/28/21	Fri 7/2/21	
	Gather and document	5 days	Mon 6/28/21	Fri 7/2/21	
	Planning complete	0 days	Mon 6/28/21	Mon 6/28/21	
	⊿ **Phase 2 Execution**	**10 days**	**Mon 6/28/21**	**Fri 7/9/21**	
	Design and Build	10 days	Mon 6/28/21	Fri 7/9/21	
	Deliverable 1 - Design Activities	5 days	Mon 6/28/21	Fri 7/2/21	
	Deliverable 2 - Design Activities	8 days	Mon 6/28/21	Wed 7/7/21	
	Design complete	0 days	Mon 6/28/21	Mon 6/28/21	
	Deliverable 3 - Build Activities	5 days	Mon 6/28/21	Fri 7/2/21	
	Build complete	1 day	Mon 6/28/21	Mon 6/28/21	
	Test	5 days	Mon 6/28/21	Fri 7/2/21	

Subtask creation

To create this scheme, where the subtasks corresponding to each phase are defined, the concept of indentation is used.
Tasks that are part of a phase are selected and indented.
If we want to reverse the process, the tasks are selected and indented.

Subtask creation

To define subtasks we use the following buttons, located in Task, Schedule

Indent Makes the task a subtask of the preceding task

Unindent Removes the indent of the selected task

Subtask creation

Select the tasks indicated in the image below and indent them. Also practice indentation cancellation.

	ⓘ	Modo de	Nombre de tarea	Duración	Comienzo	Fin
0			Condominio Primavera	5 días?	5/4/2015	5/8/2015
1			Fase 1	1 día?	5/4/2015	5/4/2015
2			Tarea 1 - 1	5 días	5/4/2015	5/8/2015
3			Tarea 1 - 2	2 días	5/4/2015	5/5/2015
4			Tarea 1 - 3	3 días	5/4/2015	5/6/2015
5			Fase 2	1 día?	5/4/2015	5/4/2015
6			Tarea 2 - 1	2 días	5/4/2015	5/5/2015
7			Tarea 2 - 2	3 días	5/4/2015	5/6/2015
8			Tarea 2 - 3	2 días	5/4/2015	5/5/2015

Subtask creation

Expected results:

Subtask creation - Resulting changes

The above process made the following changes:

Phase type tasks (1):

- A black triangle appears before the task name, which, if it is pressed with the mouse, it turns into a white triangle and hide subtasks.

- Task data is bold.

- The blue bar that represents the task on the Gantt Chart is replaced by a bar covering its subtasks.

	◢ **Office 365 T&T Project**	**10 days**	
	▷ **Phase 1 Planning**	**10 days**	
	Planning complete	0 days	
	▷ **Phase 2 Execution**	**10 days**	

Subtask creation - Resulting changes

The above process made the following changes:
Tasks indented (2):

- The task name value is indented.
- The task is left with a dependency on the immediate superior task.

Creation of Recurring Tasks

They are tasks that are repeated periodically.

Eg: Follow-up meetings.

Creation of Recurring Tasks

- Position yourself on the line where you want to insert the task
- Select Task on Ribbon Menu
- Menu will display
- Select Recurring Taks
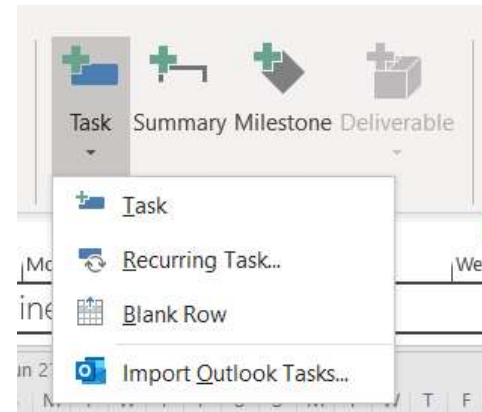
Creation of Recurring Tasks

Set up the following repeating task:

Create a Milestone

Special task with duration of 0 (or a short duration).

It represents a special event in the development of the project.

Examples:

End of a phase, project closure, contract signed, etc.

Milestone

- Method 1. Enter 0 for the duration of the task.
- Method 2. Double click on the task, select the "Advanced" tab in the "Task information" window and check \ uncheck the "Mark the task as milestone" box.

Create a Milestone

Set a milestone with a duration of 0 day.

|						
15			◢ **Follow-up meetings**	**25.25 days**	**Wed 6/30/21**	**Wed 8/4/21**
16			Follow-up meetings 1	2 hrs	Wed 6/30/21	Wed 6/30/21
17			Follow-up meetings 2	2 hrs	Wed 7/7/21	Wed 7/7/21
18			Follow-up meetings 3	2 hrs	Wed 7/14/21	Wed 7/14/21
19			Follow-up meetings 4	2 hrs	Wed 7/21/21	Wed 7/21/21
20			Follow-up meetings 5	2 hrs	Wed 7/28/21	Wed 7/28/21
21			Follow-up meetings 6	2 hrs	Wed 8/4/21	Wed 8/4/21
22			**End of Project**	**0 days**	**Mon 6/28/21**	**Mon 6/28/21**

Tasks Editing
Delete a task

Delete a Taks

- Select the task to delete
- Select the right mouse button and the option "Delete task".
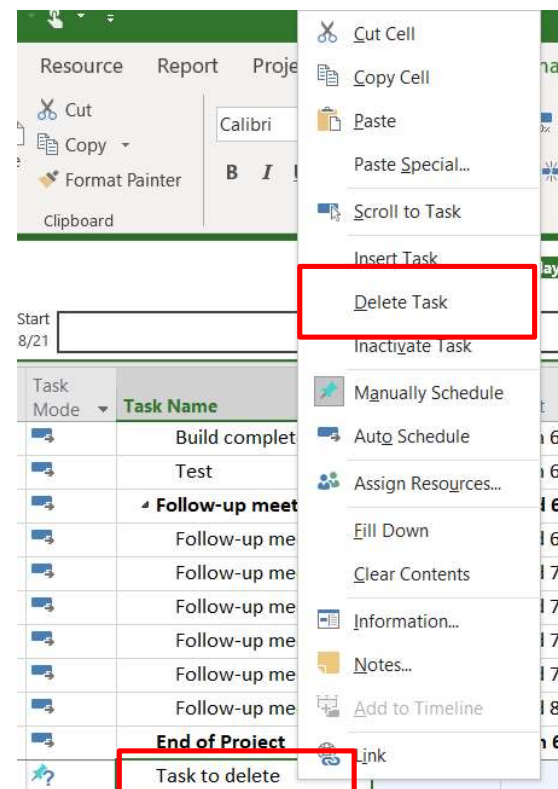
Tasks Editing

Move a Task

Select the task to move and hold down the left mouse button, move the cursor and position the gray line in the desired place and release the button

| 2 | | Tarea 1 - 1 | 5 días | 5/4/2015 |
3		Tarea 1 - 2	2 días	5/4/2015
4		Tarea 1 - 3	3 días	5/4/2015
5		⊿ **Fase 2**	**3 días**	**5/4/2015**
6		Tarea 2 - 1	2 días	5/4/2015
7		Tarea 2 - 2	3 días	5/4/2015

Tasks Editing

Insert or Hide a Column

- **To insert a column**: Select FORMAT | Columns | Insert column and select it from the drop-down list.
- **To hide a column**: Select the column by clicking the name of it, and then right-click "Hide column

Tasks Editing
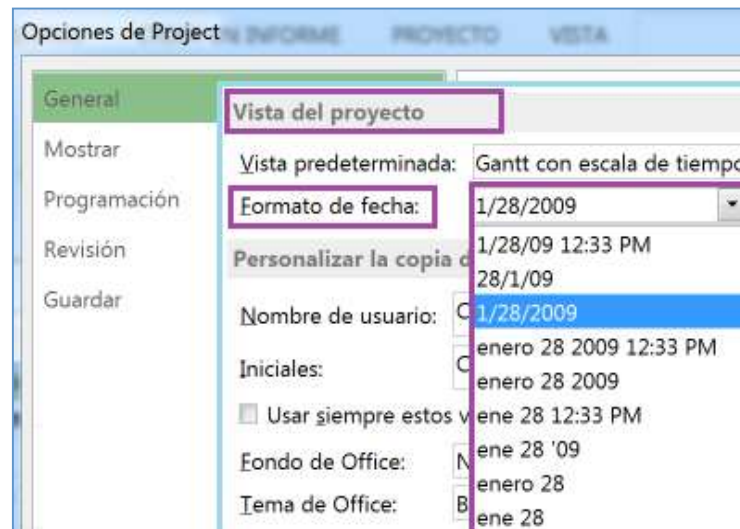
Modify the format of the values in the date type columns.

- Select FILE | Options | General | Project view and for the parameter "Date format" select the desired format
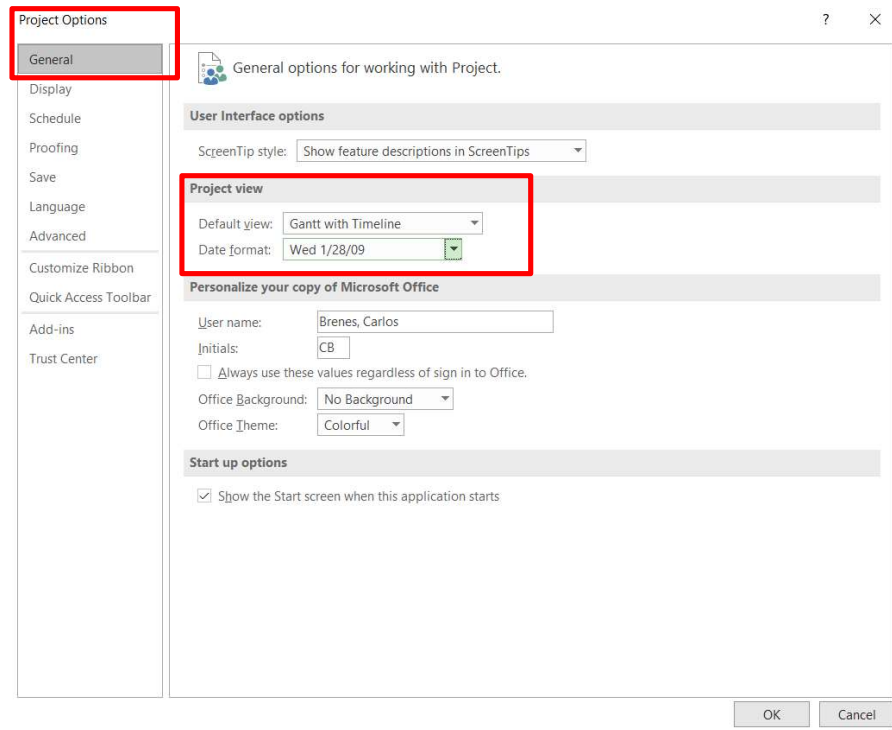
Tasks Editing

Modify the format of the values in the date type columns.

Some formats include time.

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