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CS 587 Software Project Management
Instructor: **Dr. Atef Bader**

MS Project Tutorial

MS Project in Labs:

- Available in Siegal Hall Lab in Main Campus
- Available in Room 210 Rice Campus

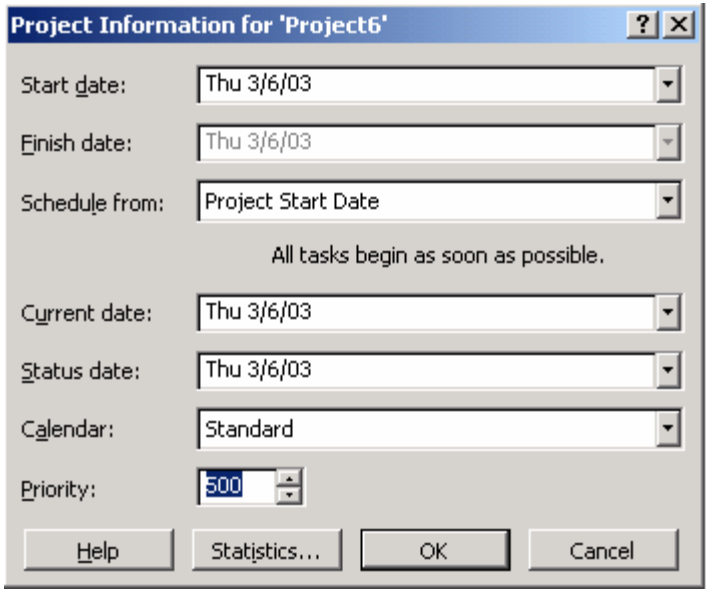
Prepared by
Milton Hurtado

How to get MS Project ?

- Download MS project from following link
  http://www.microsoft.com/office/project/

Embarking new Project

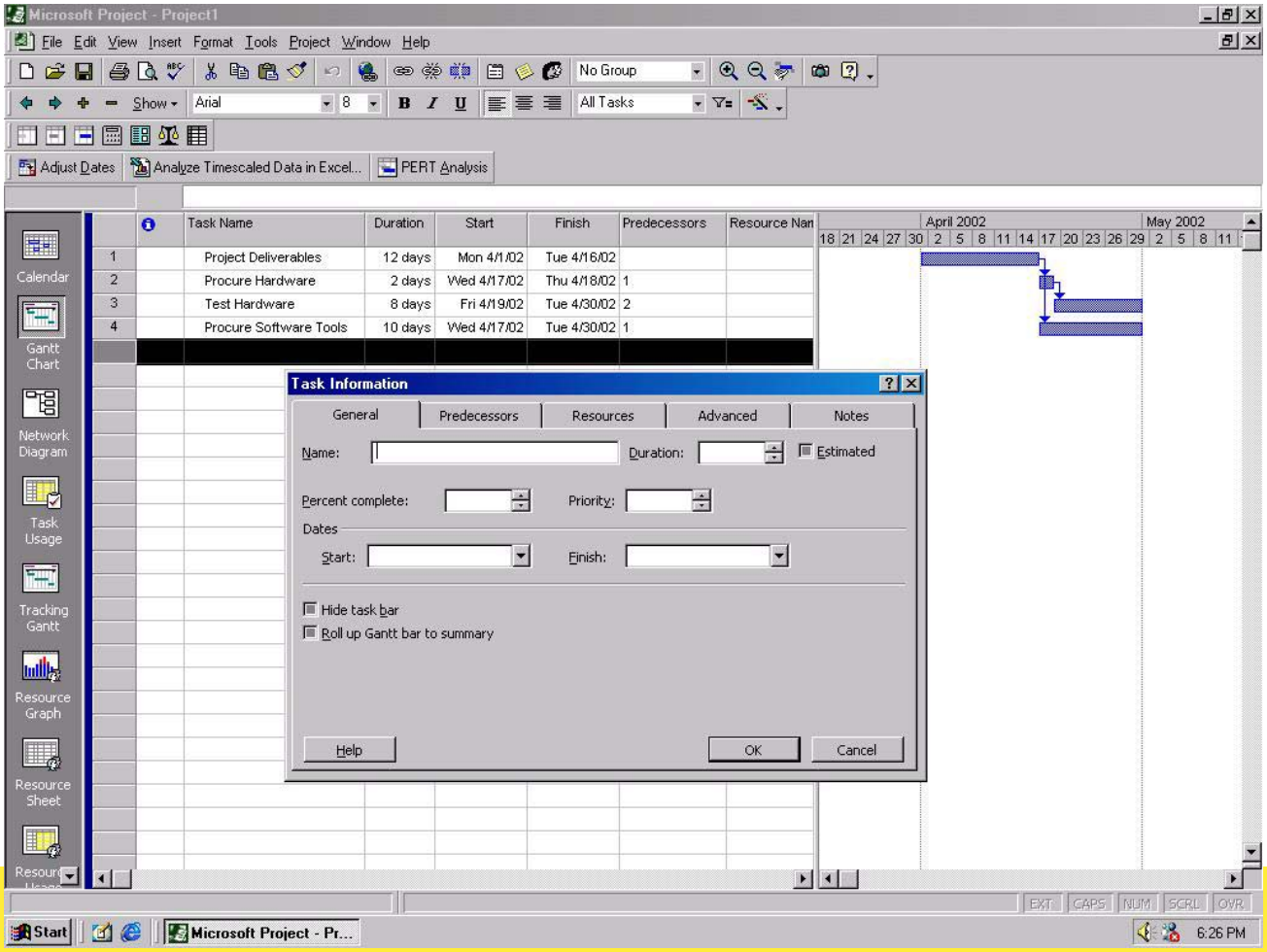
- Go to file, select new. This will open a screen for blank project click ok.
- You can now enter your project information viz. start date, finish date and also how would you like to schedule the project from either start or finish date.
- You can also chose selection if you will be using night shifts.



Gantt Chart

- Select Gantt Chart view from the view menu.
- You'll have a spreadsheet where you can now enter information of all the activities

  i.e. task name, duration, start date, end date, predecessors and various other fields.
- You can enter required information in two ways, in spreadsheet or when you double click on cell you get pop up window in which you can enter all the information of that particular activity.
- For predecessor activity you need to write activity number.
- The SW itself will calculate start and end date.
- Now the Gantt Chart is complete.


Microsoft Project - Project1
File Edit View Insert Format Tools Project Window Help
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Adjust Dates
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Calendar
Gantt Chart
Network Diagram
Task Usage
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1 Project Deliverables 12 days Mon 4/1/02 Tue 4/16/02
2 Procure Hardware 2 days Wed 4/17/02 Thu 4/18/02 1
3 Test Hardware 8 days Fri 4/19/02 Tue 4/30/02 2
4 Procure Software Tools 10 days Wed 4/17/02 Tue 4/30/02 1
April 2002
May 2002
Task Information
General
Predecessors
Resources
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Name:
Duration:
Estimated
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Hide task bar
Roll up Gantt bar to summary
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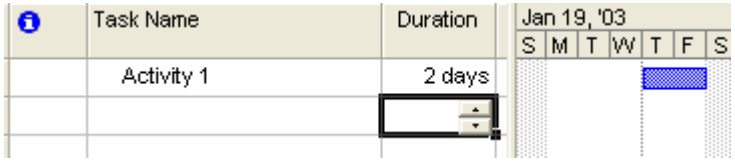
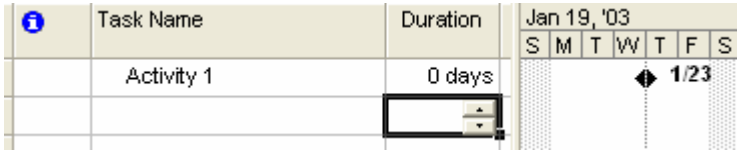
Microsoft Project - Pr...
6:26 PM

Adding tasks and milestones to a Project File

1. On the View menu, click Gantt Chart.
2. In the Task Name field, type a task name, and then press TAB. (Microsoft Project enters an estimated duration of one day for the task followed by a question mark)
3. In the Duration field, type the amount of time each task will take in months, weeks, days, hours, or minutes, not counting nonworking time. (By default the time period will be days, but that can be changed to hours, months, etc.)
4. Press ENTER.
5. It should look like the figure below:



6. To add a milestone the only difference is that the duration of the activity must be zero (below is an example):

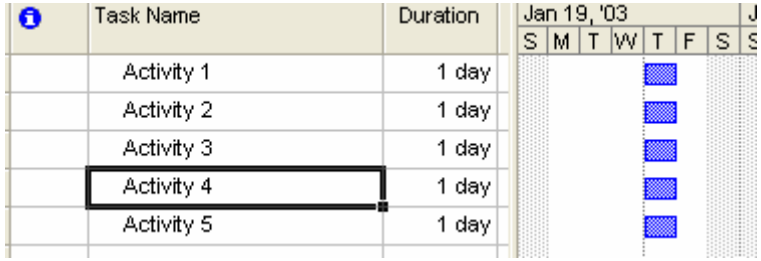


Note: By double clicking on a Task or milestone, you can modify its information with a form that prompts

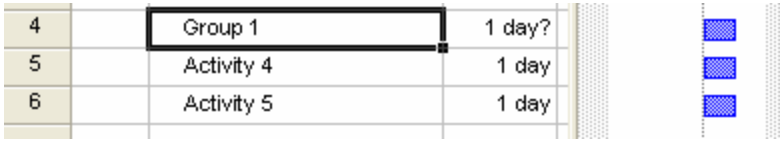
Grouping Tasks in Logical Order (WBS Outline)

Outlining helps organize your tasks into more manageable chunks. You can indent related tasks under a more general task, creating a hierarchy. The general tasks are called summary tasks; the indented tasks below the summary task are subtasks. A summary task's start and finish dates are determined by the start and finish dates of its earliest and latest subtasks.

1. Click once on the first activity of the group of activities you want to group. For the example Activities 4 and 5



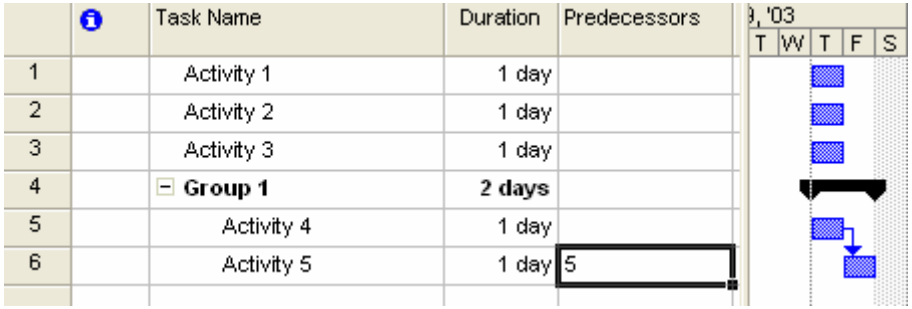
2. Then click on the option “New Task” in the “Insert” Menu to insert a new task that will represent the name of the group (“Group 1” for this example)



3. Then select the tasks below (4 and 5) and then click in the option “Outline-Indent” in the “Project” Menu

Creating Relationships Between Tasks

A network of tasks in a project must be connecting activities from the start to the end, to establish these relationship we need to use the field “Predecessors” of each task, where we can designate which activity will be preceding the one we are updating, in the example below we will indicate MS project that “**Activity 5**” can start once “**Activity 4**” is completed (**Finish to Start** relationship).



Notice that by establishing the relationship now the Group 1 takes 2 days to be completed, because before, the activities were set to be performed in parallel, and now they are in series (**Finish to Start** relationship)

Note: MS project will calculate dates based on the durations of the tasks, their relationships and the start date set for the project, however it is possible to change the starting date of a task (if necessary) By double clicking on a Task or milestone, and using the fields related to the dates (Start or Finish)

Assigning Resources to Tasks

You can use the Resource Sheet in Microsoft Project to create a list of the people, equipment, and material resources that make up your team and carry out the project tasks. Your resource list will consist of work resources or material resources. Work resources are people or equipment; material resources are consumable materials or supplies, such as concrete, wood, or nails.

1. On the View menu, click Resource Sheet.
2. On the View menu, point to Table, and then click Entry.
3. In the Resource Name field, type a resource name.
4. You can go through the fields in the sheet, but for the simplicity of the example just focus on the name and initials of the Resource
5. Below is an example of some Human resources added to the Resource Sheet (We could add also other type of resources such as Equipments, Consumables, etc.)

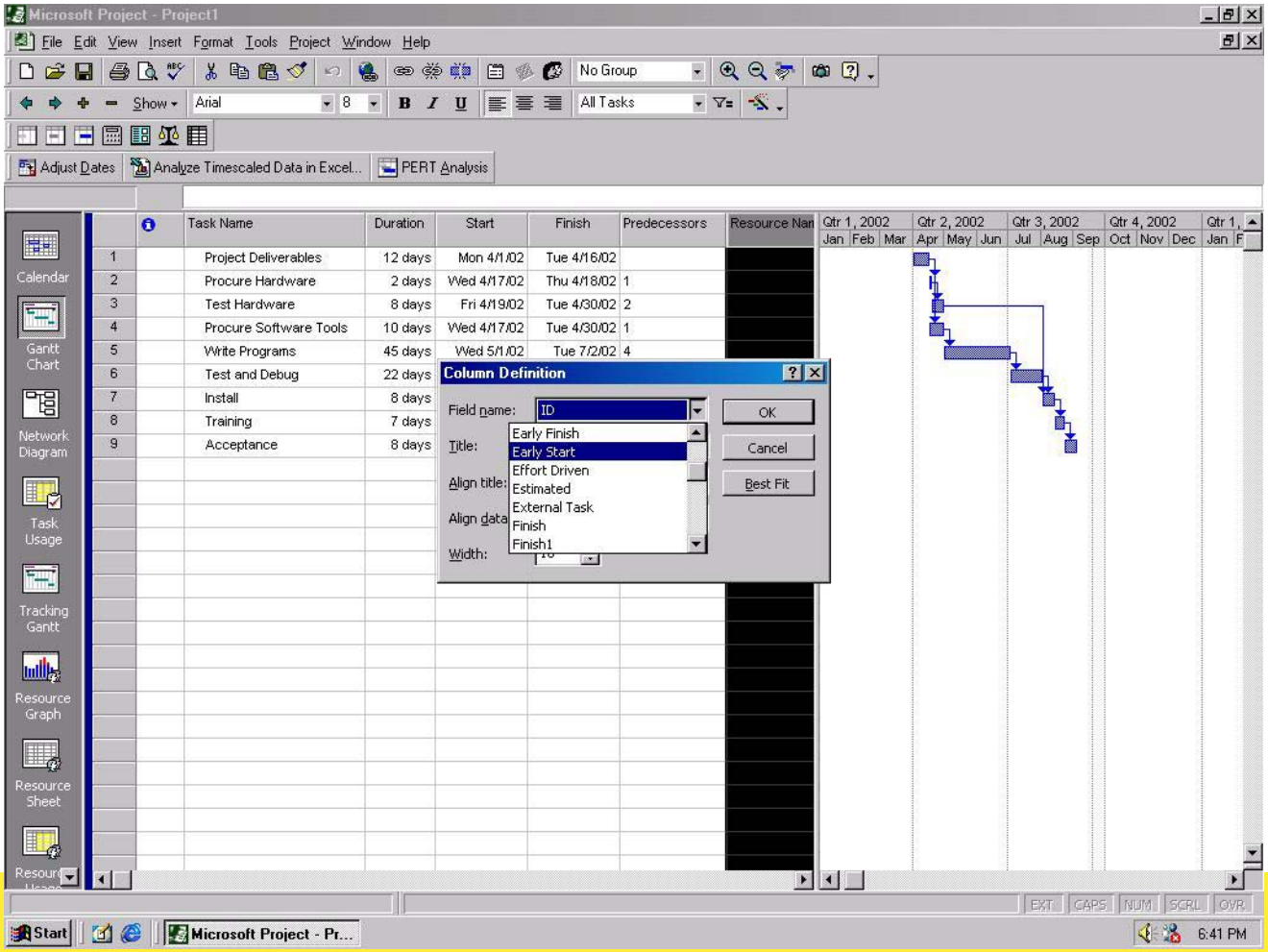
	Resource Name	Type	Material Label	Initials	Group	Max. Units
1	Project Manager	Work		P		100%
2	Team Leader	Work		T		100%
3	Developer	Work		D		100%
4	Tester	Work		T		100%

6. Once the resources are created, you can go back to the View menu, and click Gantt Chart to see again the tasks, and then when you double click a task you can add a resource to this task by using the tab “Resources”

Note: The main goal of the resource assignment is to allocate properly the resources and to provide valuable information regarding the effort of the team.

Find Critical Path

- Critical Path Analysis (CPA) helps you to lay out all tasks that must be completed as part of a project.
- CPA helps you to identify the minimum length of time needed to complete a project
- For finding CP list all the activities and enter early start, late start, early finish and late finish info of all the activities.
- You can do this under insert/columns and selecting each terms.
- Following screen shot demonstrates how to insert.
- Project automatically calculates ES, EF, LS and LF based on the starting/ending dates you have provided.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Gantt Chart
Network Diagram
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2 Procure Hardware 2 days Wed 4/17/02 Thu 4/18/02 1
3 Test Hardware 8 days Fri 4/19/02 Tue 4/30/02 2
4 Procure Software Tools 10 days Wed 4/17/02 Tue 4/30/02 1
5 Write Programs 45 days Wed 5/1/02 Tue 7/2/02 4
6 Test and Debug 22 days
7 Install 8 days
8 Training 7 days
9 Acceptance 8 days
Qtr 1, 2002
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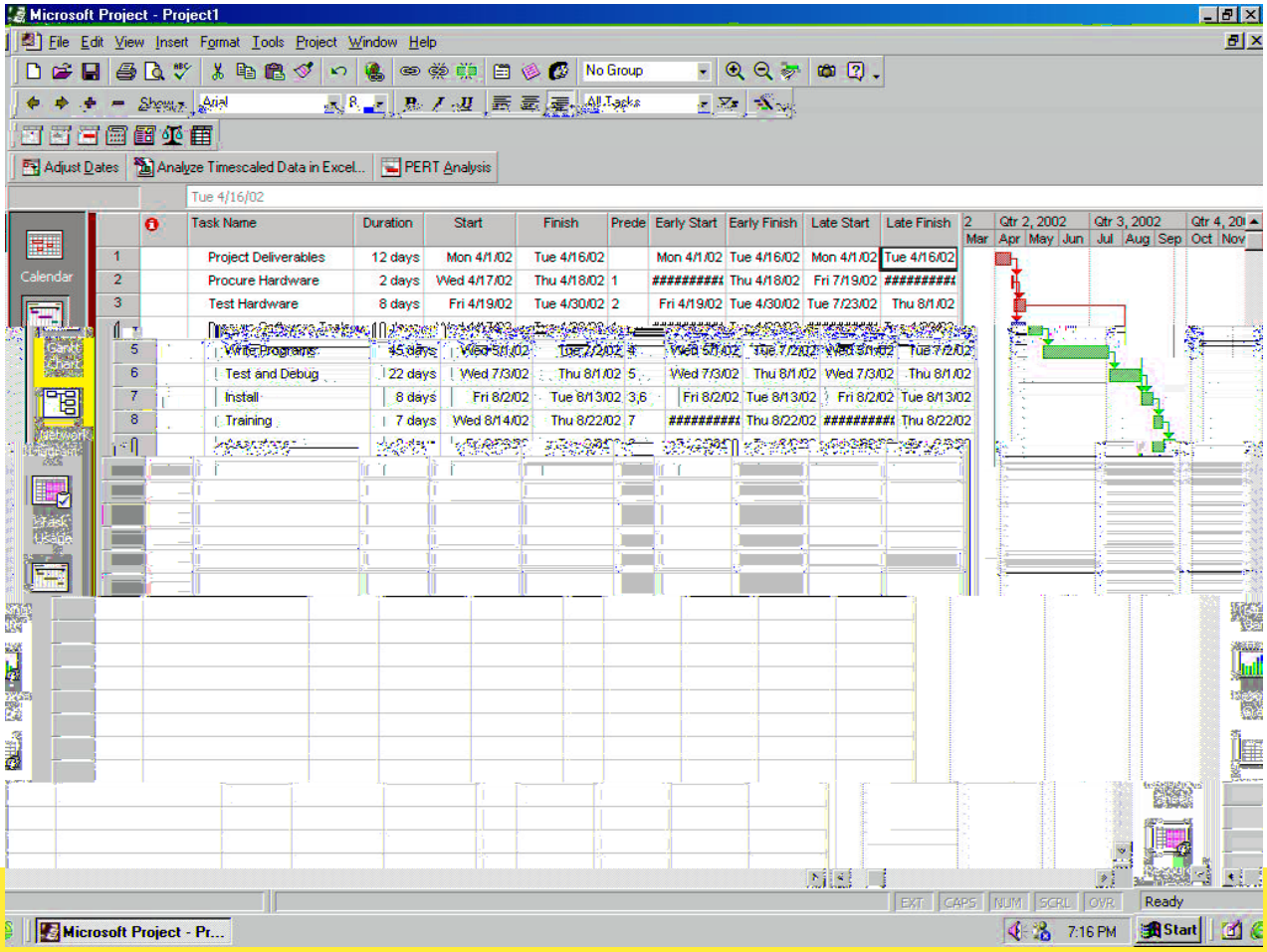
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3 Test Hardware 8 days Fri 4/19/02 Tue 4/30/02 2 Fri 4/19/02 Tue 4/30/02 Tue 7/23/02 Thu 8/1/02
5 Write Programs 45 days Wed 5/1/02 Tue 7/2/02 4 Wed 5/1/02 Tue 7/2/02 Wed 5/1/02 Tue 7/2/02
6 Test and Debug 22 days Wed 7/3/02 Thu 8/1/02 5 Wed 7/3/02 Thu 8/1/02 Wed 7/3/02 Thu 8/1/02
7 Install 8 days Fri 8/2/02 Tue 8/13/02 3,6 Fri 8/2/02 Tue 8/13/02 Fri 8/2/02 Tue 8/13/02
8 Training 7 days Wed 8/14/02 Thu 8/22/02 7 ########## Thu 8/22/02 ########## Thu 8/22/02
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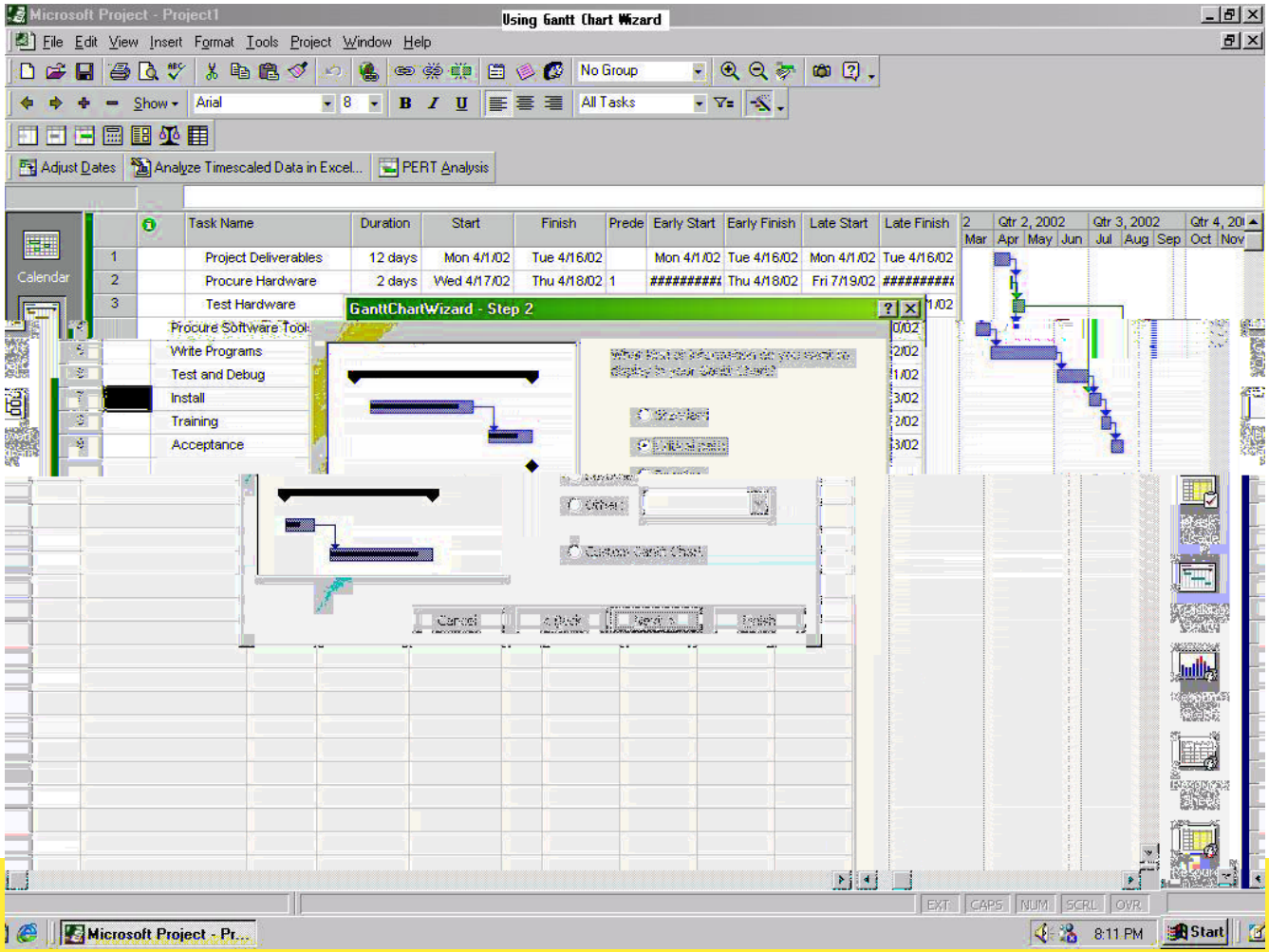
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Procure Software Tools
Write Programs
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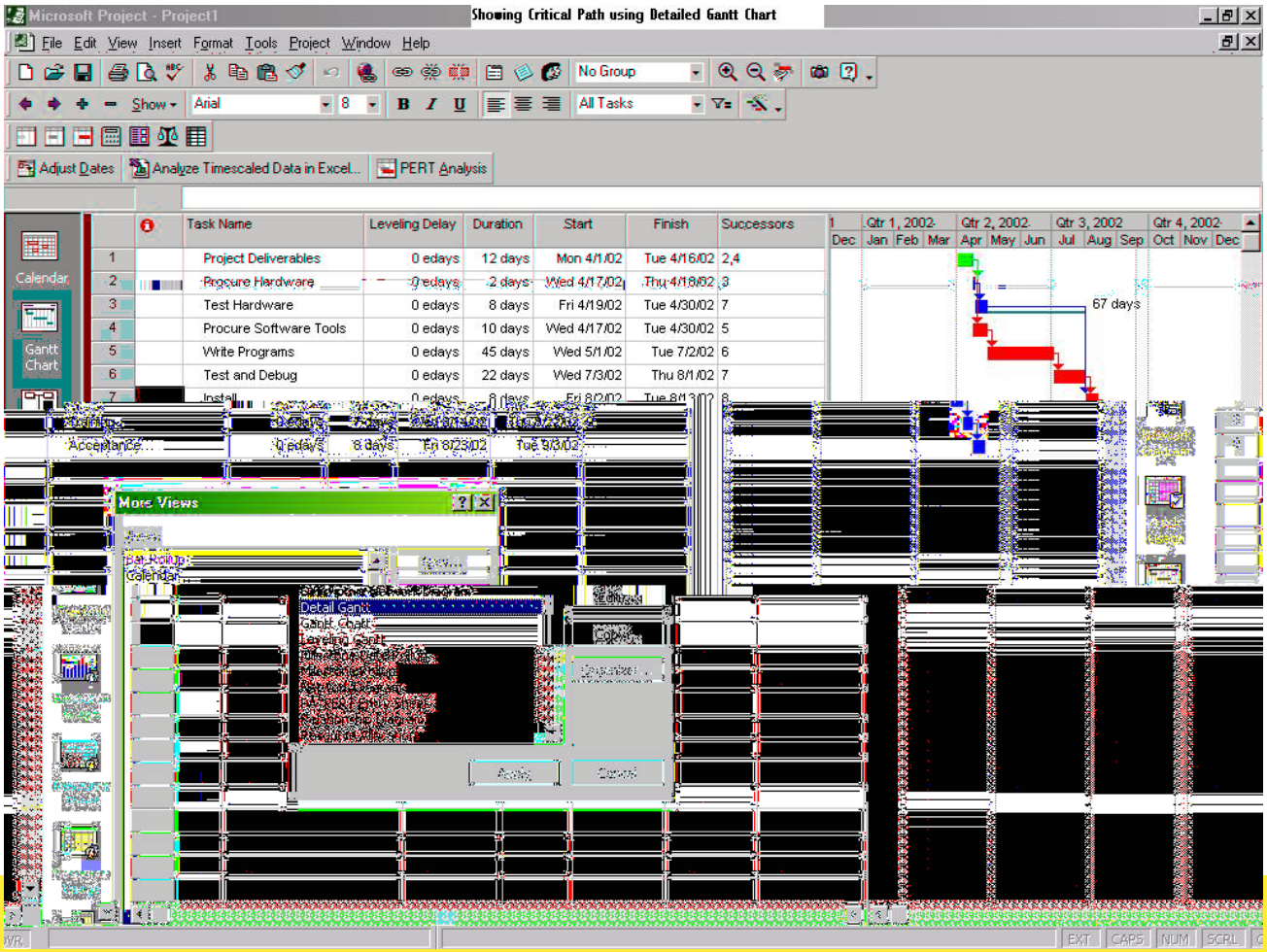
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2 Procure Hardware 0 edays 2 days Wed 4/17/02 Thu 4/18/02 3
3 Test Hardware 0 edays 8 days Fri 4/19/02 Tue 4/30/02 7
4 Procure Software Tools 0 edays 10 days Wed 4/17/02 Tue 4/30/02 5
5 Write Programs 0 edays 45 days Wed 5/1/02 Tue 7/2/02 6
6 Test and Debug 0 edays 22 days Wed 7/3/02 Thu 8/1/02 7
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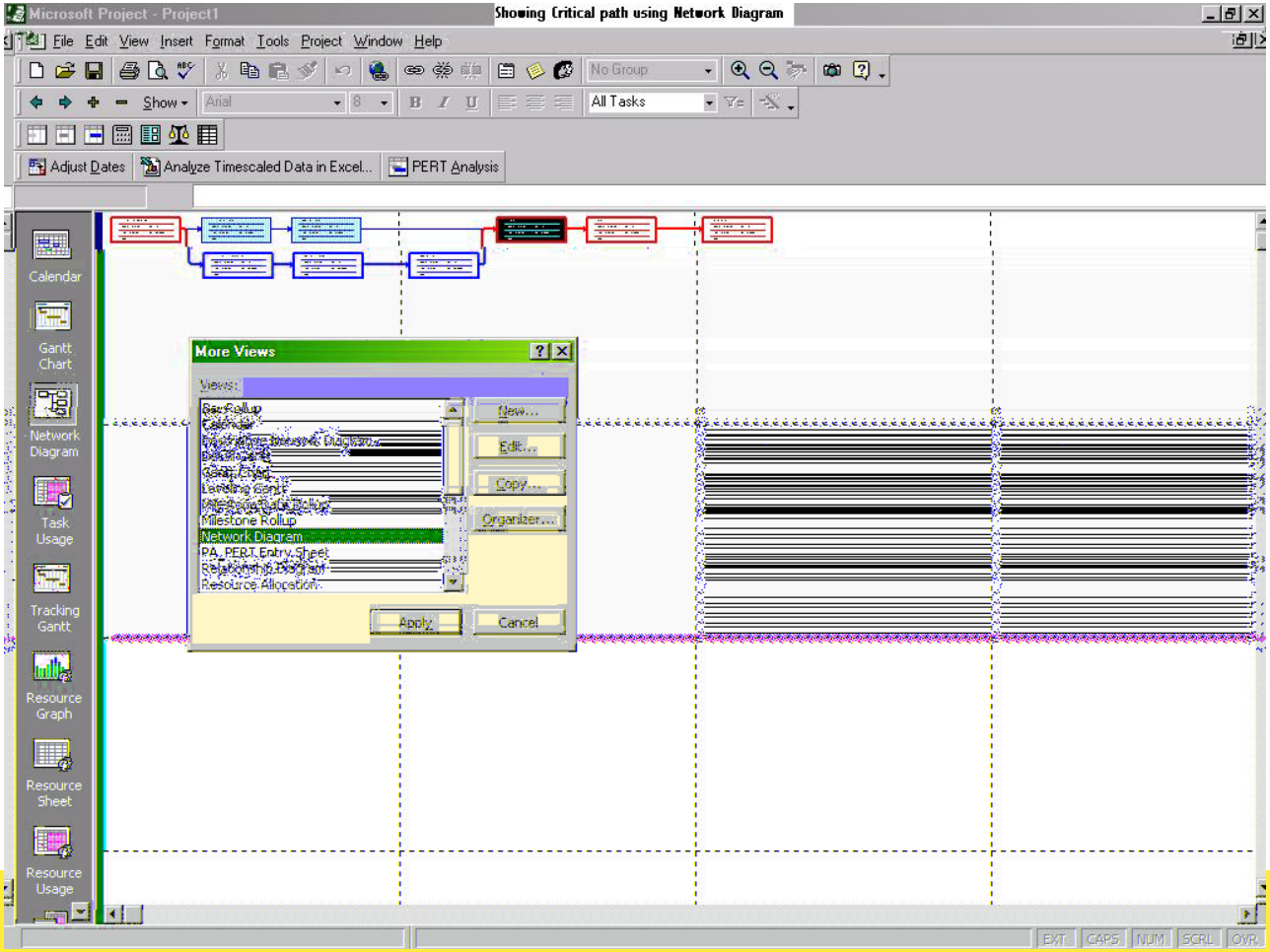
Microsoft Project - Project1
Showing Critical path using Network Diagram
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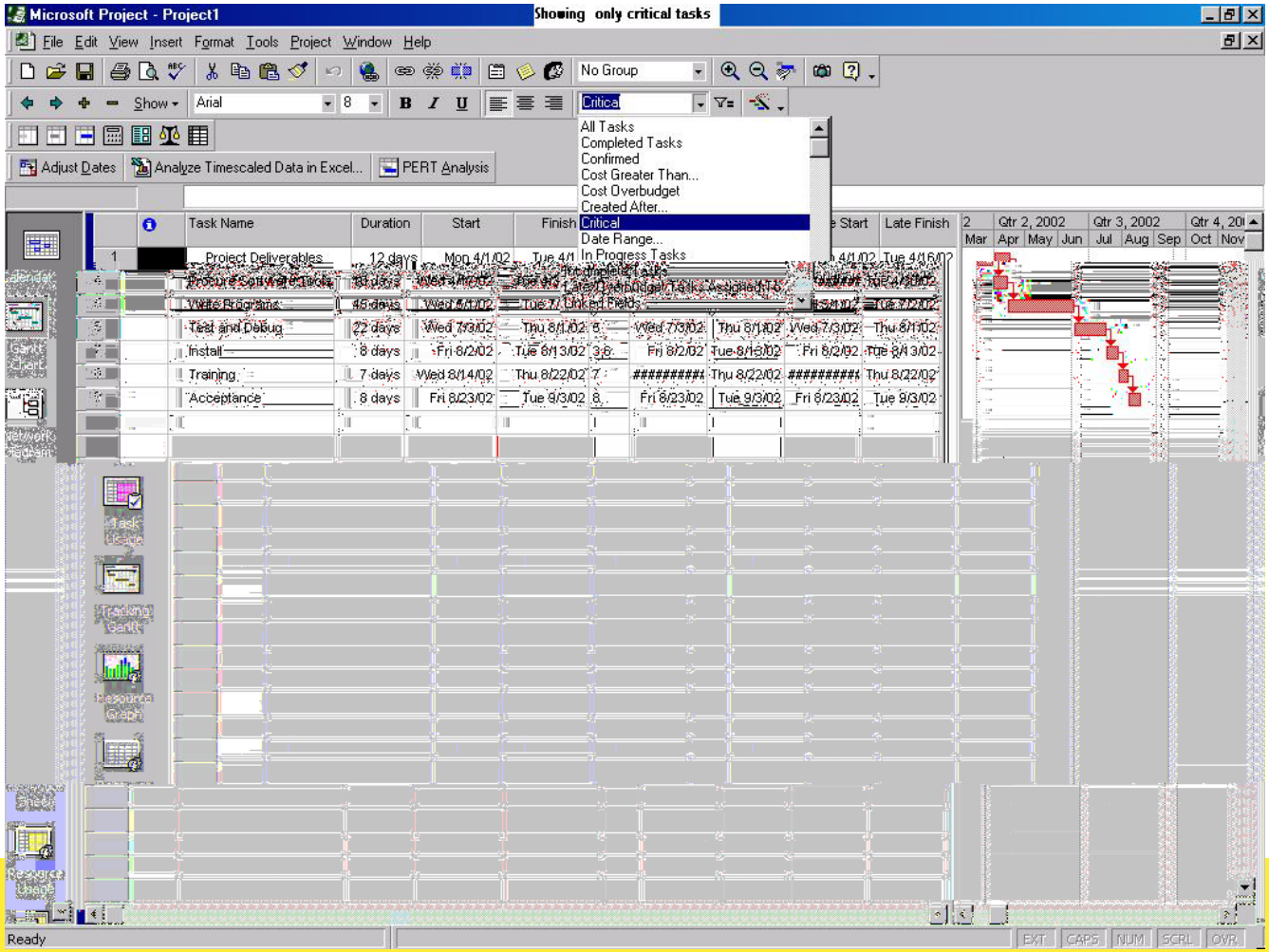
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Showing only critical tasks
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In Progress Tasks
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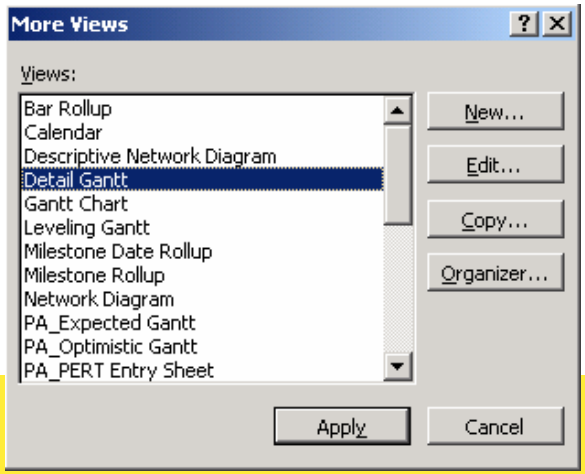
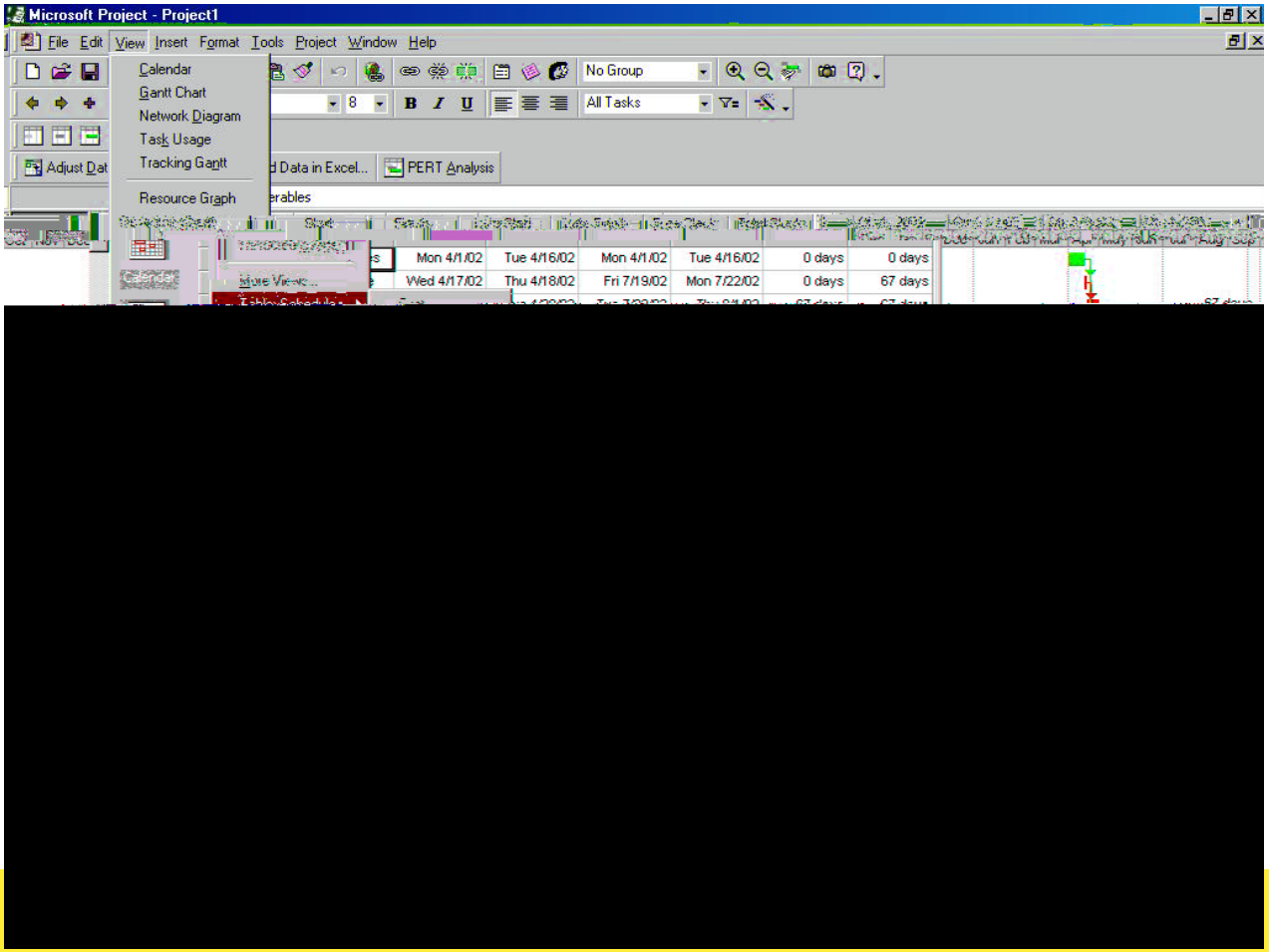
Procure Software Tools 30 days Wed 4/17/02 Tue 5/28/02
Write Programs 45 days Wed 5/29/02 Tue 7/30/02
Test and Debug 22 days Wed 7/31/02 Thu 8/1/02 6 Wed 7/31/02 Thu 8/1/02 Wed 7/31/02 Thu 8/1/02
Install 8 days Fri 8/2/02 Tue 8/13/02 3,6 Fri 8/2/02 Tue 8/13/02 Fri 8/2/02 Tue 8/13/02
Training 7 days Wed 8/14/02 Thu 8/22/02 7 ########## Thu 8/22/02 ########## Thu 8/22/02
Acceptance 8 days Fri 8/23/02 Tue 9/3/02 8 Fri 8/23/02 Tue 9/3/02 Fri 8/23/02 Tue 9/3/02
Qtr 2, 2002
Qtr 3, 2002
Qtr 4, 20
Mar Apr May Jun Jul Aug Sep Oct Nov
Ready
EXT CAPS NUM SCRL OVR

Slack Time For Scheduling

- For viewing the schedule showing the slack go to Views → More views → Detailed Gantt view → Apply.
- In this click on View → Table → Schedule
- Slack appears as thin bars to the right of a task, with slack values adjoining the regular Gantt bars
- You can also view the free slack and total slack of a task in the sheet.
- You can move the activity within the available slack time, to balance the resources, in the cases where over allocation is present.

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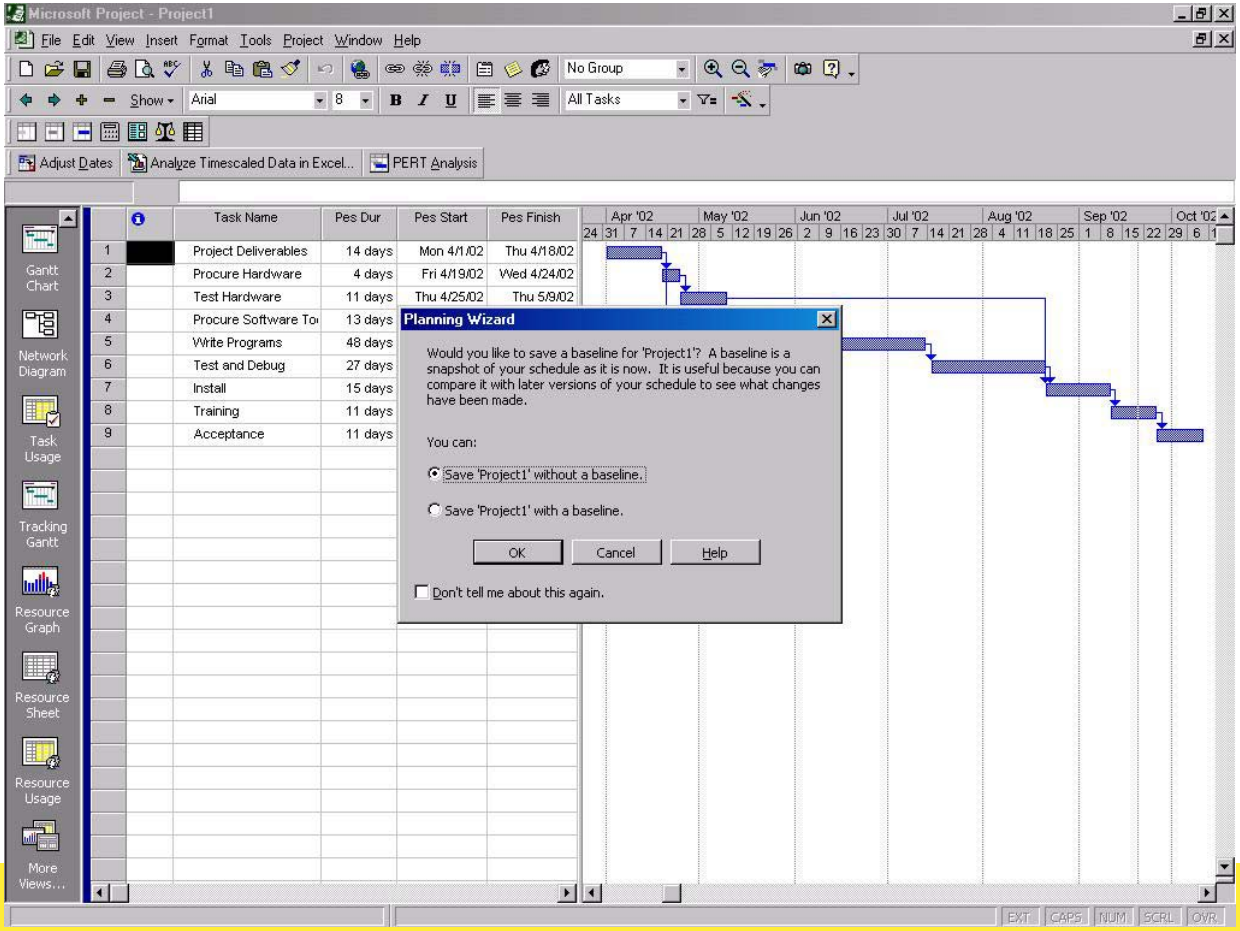
Wed 4/17/02 Thu 4/18/02 Fri 7/19/02 Mon 7/22/02 0 days 67 days

Closing Project

- When you are saving a file it asks you whether you want to save with baseline/without baseline. You can choose either options.
- If you choose to save with baseline, a copy of your schedule and other things will be saved and any changes when you are making when the project progress can be viewed clearly using the baseline.
- If you choose to save without baseline, you will not be able to view the changes.


Microsoft Project - Project1
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Show Arial 8 All Tasks
Adjust Dates
Analyze Timescaled Data in Excel...
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Gantt Chart
Network Diagram
Task Usage
Tracking Gantt
Resource Graph
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Resource Usage
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1 Project Deliverables 14 days Mon 4/1/02 Thu 4/18/02
2 Procure Hardware 4 days Fri 4/19/02 Wed 4/24/02
3 Test Hardware 11 days Thu 4/25/02 Thu 5/9/02
4 Procure Software To 13 days
5 Write Programs 48 days
6 Test and Debug 27 days
7 Install 15 days
8 Training 11 days
9 Acceptance 11 days
Apr '02
May '02
Jun '02
Jul '02
Aug '02
Sep '02
Oct '02
Planning Wizard
Would you like to save a baseline for 'Project1'? A baseline is a snapshot of your schedule as it is now. It is useful because you can compare it with later versions of your schedule to see what changes have been made.
You can:
Save 'Project1' without a baseline.
Save 'Project1' with a baseline.
OK
Cancel
Help
Don't tell me about this again.
EXT CAPS NUM SCRL OVR

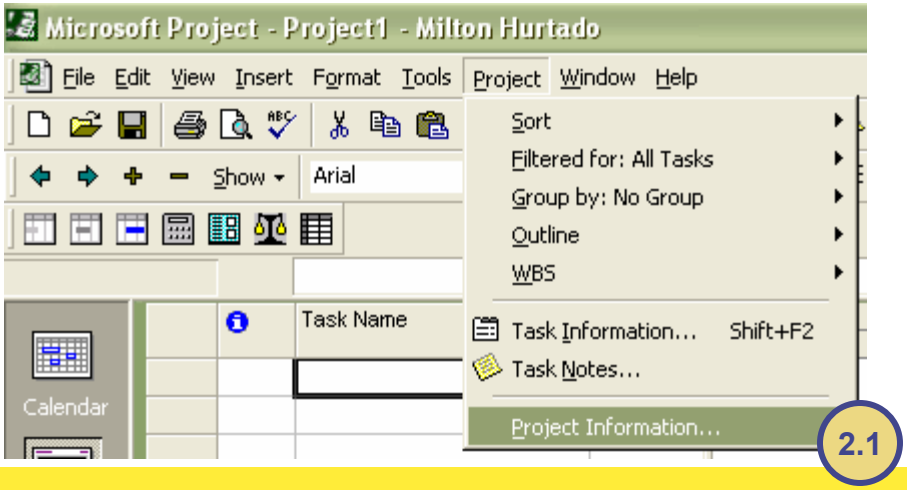
Step by Step Example

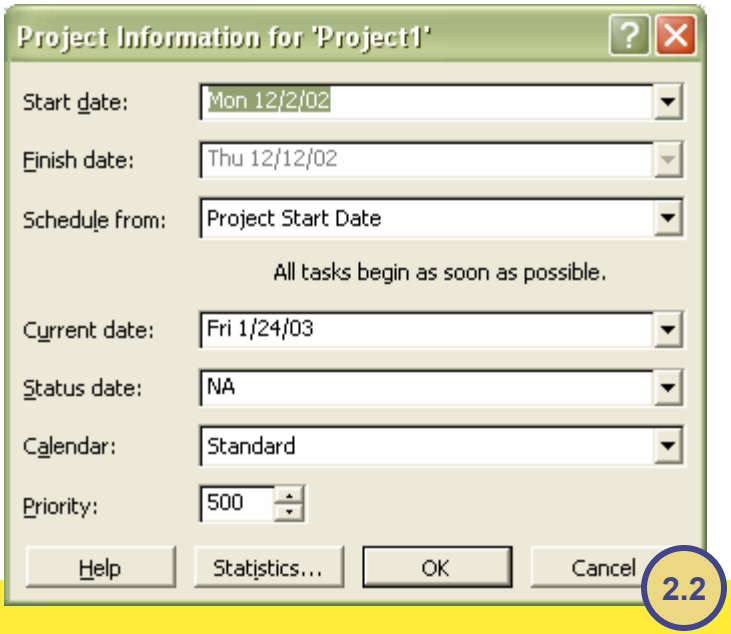
Now lets try a small example, step by step to practice each of the options we have seen so far about how to create a project using MS Project. We are going to use a small set of tasks (Table Below) related to the initial phases of a System Testing Plan (Definition and Design)

Activity	Predecessor	Responsibility	Effort	System Testing Phase
1.RSD Analysis *	Requirements Specification Document completed. (Not part of System Testing Plan)	•Test Manager •Project Manager •Test Leader	3 days	Definition Phase
2. Develop Test Plan	Activity **1**	•Test Manager •Test Leader •Tester E	5 days	Design Phase
3. Develop Test Design Specification	Activity **2**	•Tester A and B	8 days	Design Phase
4. Develop Test Case Specification	Activity **3**	•Tester A and B	5 days	Design Phase
5. Develop Test Procedure Specification	Activity **4**	•Tester A and B	3 days	Design Phase
6. Develop Test Item Transmittal Report	Activity **5**	•Tester A and B	1 days	Design Phase
7. Prepare Tools and Test Scripts	Activity **6**	•Tester A and B	3 days	Design Phase
8. Review Test Plan and Attachments	Activity **7**	•Test Manager •Test Leader •Tester E	2 days	Design Phase
9. Check that System is Ready to be Tested	Activity **7**	•Tester E, A and B	1 days	Design Phase
10. Add Design Documents to CMS (Milestone)	Activity **8**	•Test Leader •Tester E, A and B	1 days	Design Phase

Step by Step Example (Step 1 – Setup File)

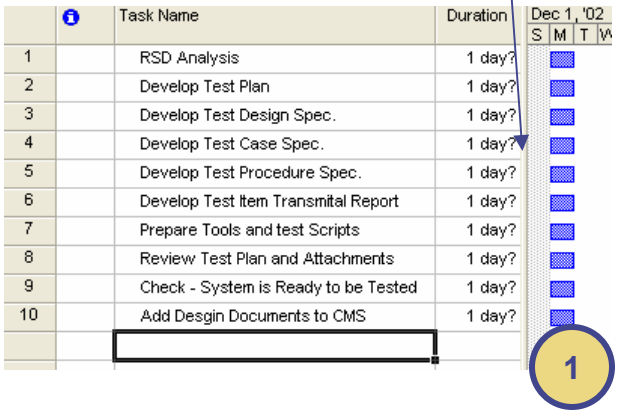
1. Create a new file “Project1”
2. Assign the start date of the project to be Dec-02-2002

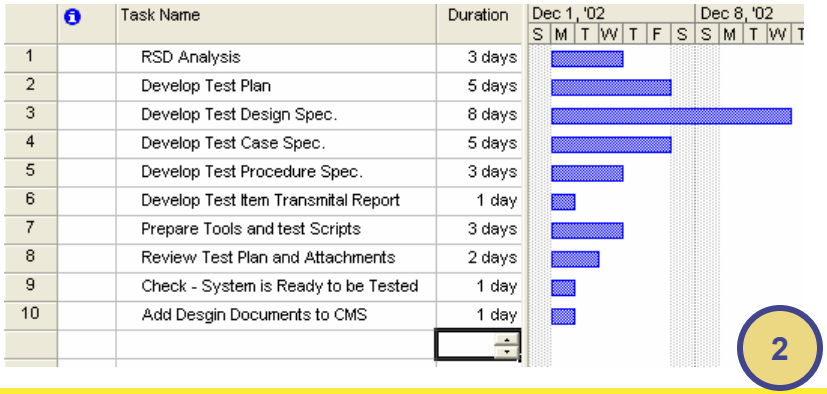




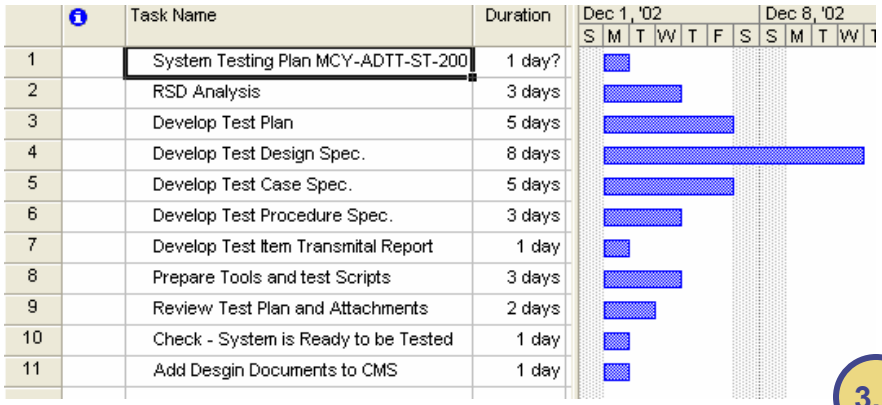
Step by Step Example (Step 2 – Add Tasks)

1. Write the name of each task in the spreadsheet using the column "**Task Name**"
2. Write the duration in days of each task in the spreadsheet using the column "**Duration**"
3. Group the tasks by the Phase according to the table of tasks shown before, and add a group that encloses the phases named "**System Testing Plan MCY-ADTT-ST-2002-01**" this will represent the plan as a whole
4. Write the predecessors of each task in the spreadsheet using the column "**Predecessors**" (If you can't see the column, try to expand the vertical bar that divides the spreadsheet to the Gantt Chart)
5. To convert a Task in a Milestone, just double click the Task and go to the tab "Advanced" then check the box that says "Mark Task as a Milestone"



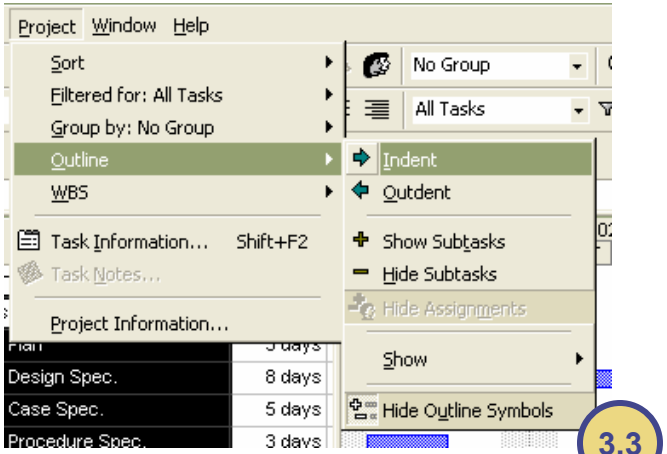


Step by Step Example (Step 2 – Add Tasks Continued)



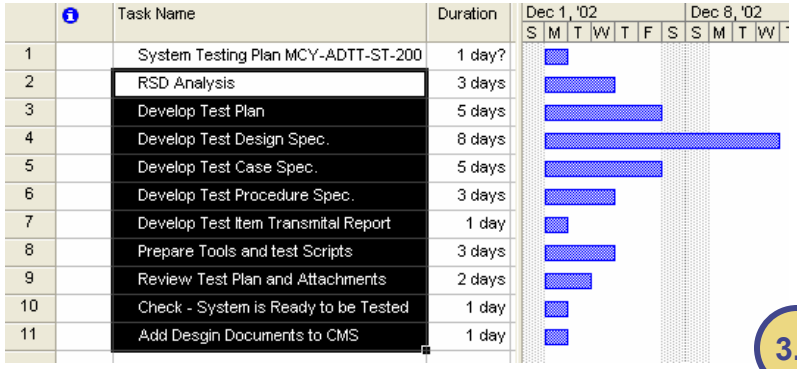
3.1

Insert a new task at the beginning that will group everything



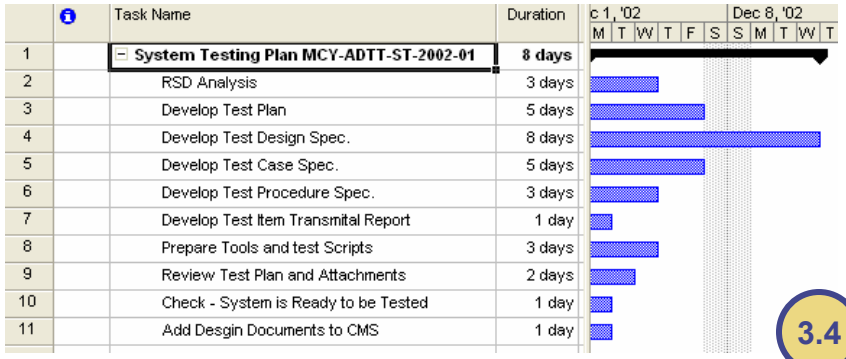
3.3

Click on the option “Outline - Indent”



3.2

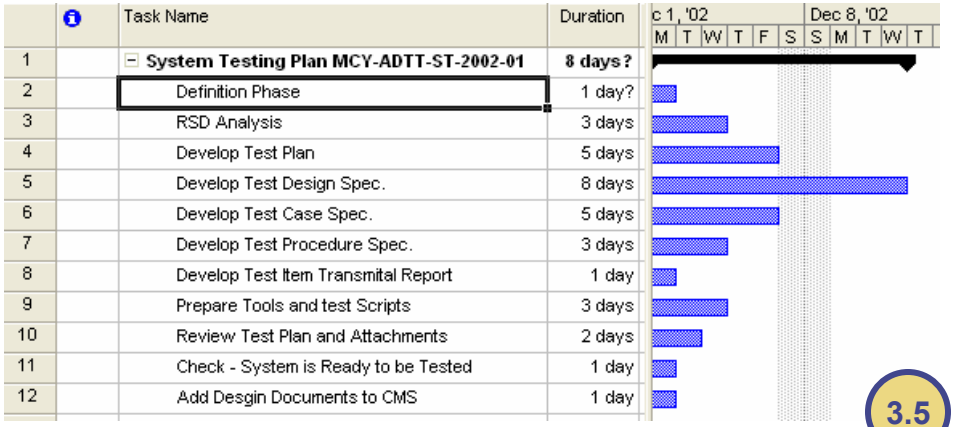
Highlight the tasks that are going to be added as subtasks



3.4

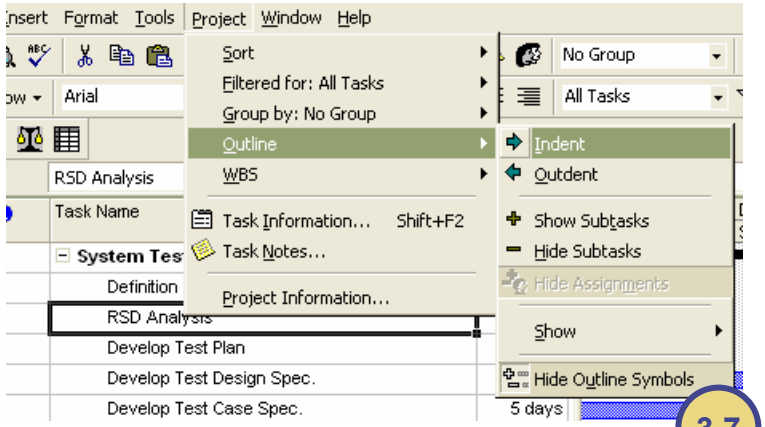
The final result should look like this, now repeat this steps to create the Subgroups that will represent the phases (Definition and Design)

Step by Step Example (Step 2 – Add Tasks Continued)



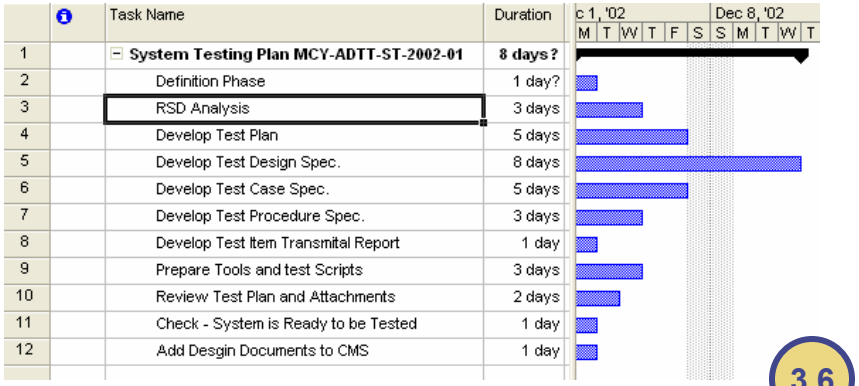
3.5

Insert a new task at the beginning of the definition tasks



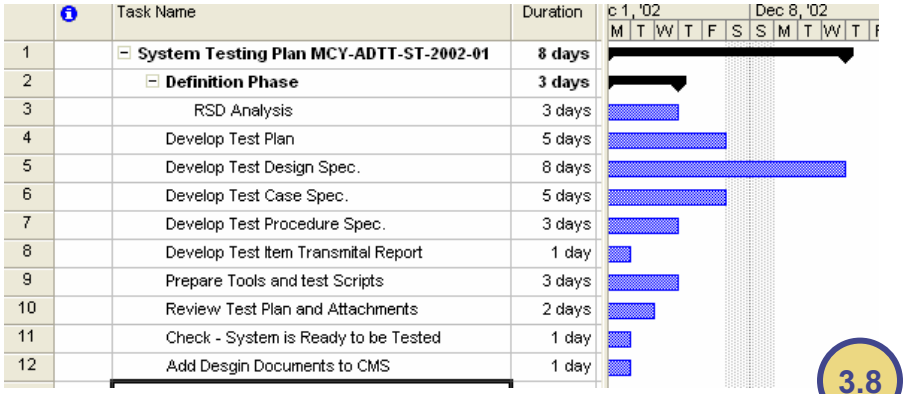
3.7

Click on the option “Outline - Indent”



3.6

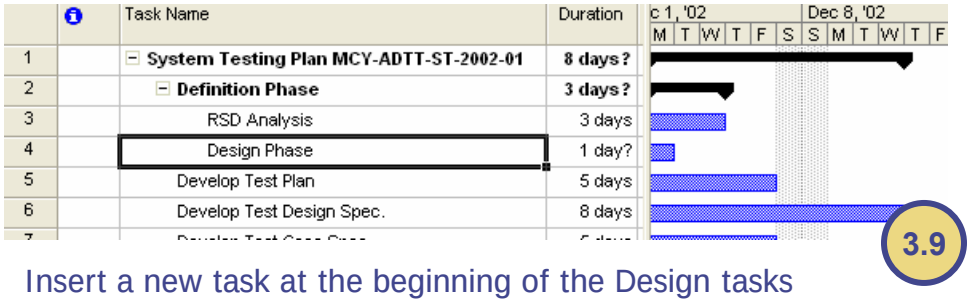
Highlight the tasks that are going to be added as subtasks



3.8

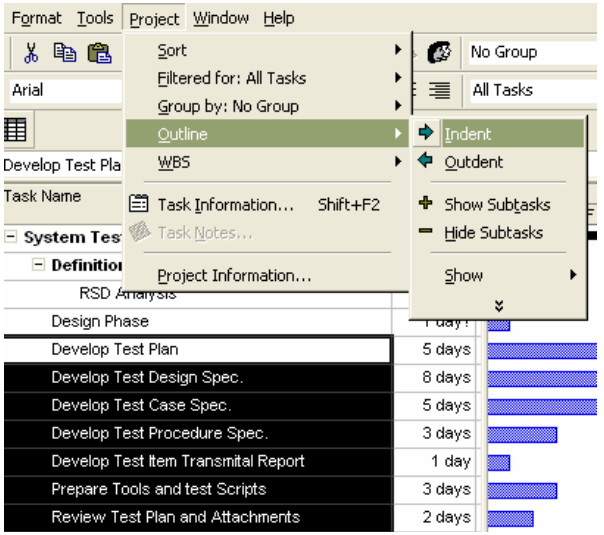
The final result should look like this, now repeat this steps to create the Subgroup that will represent the phase “Design”

Step by Step Example (Step 2 – Add Tasks Continued)

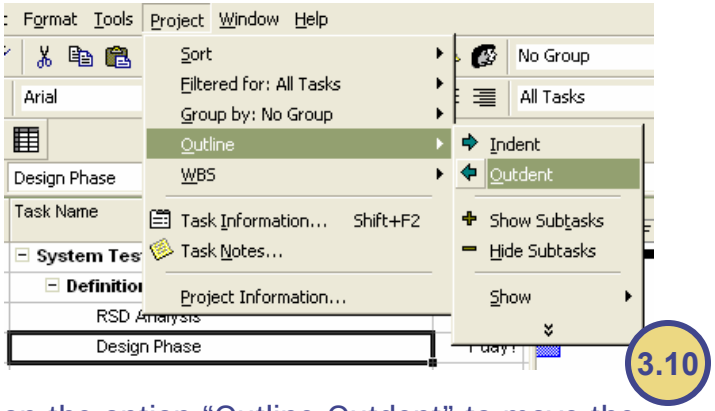


3.9

Insert a new task at the beginning of the Design tasks (Notice that the new task that will work as a group for the "Design Phase" is inside the group "Definition Phase", therefore we need to **Outdent** one position to put it at the same level as the Definition Phase)



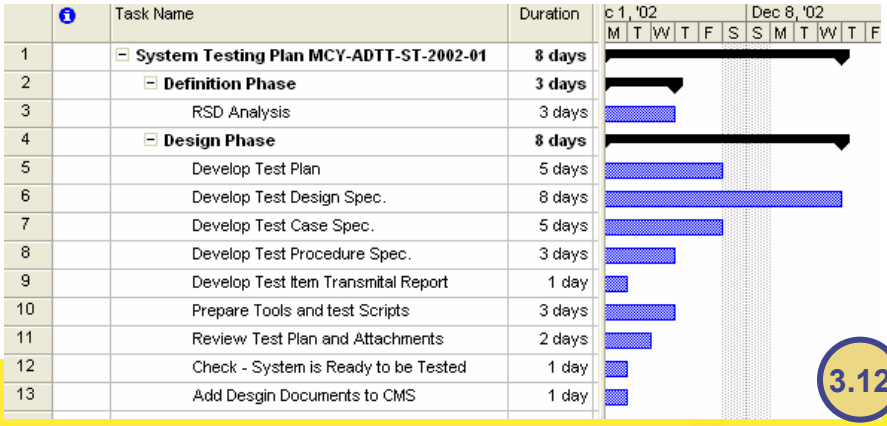
3.11



3.10

Click on the option "Outline-Outdent" to move the activity to the left

Highlight the tasks that are going to be added as subtasks in the design phase and then Click on the option "Outline - Indent"

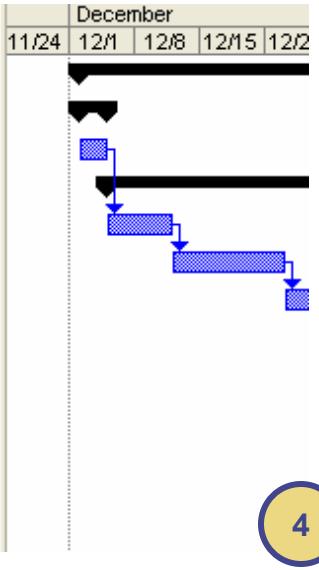


3.12

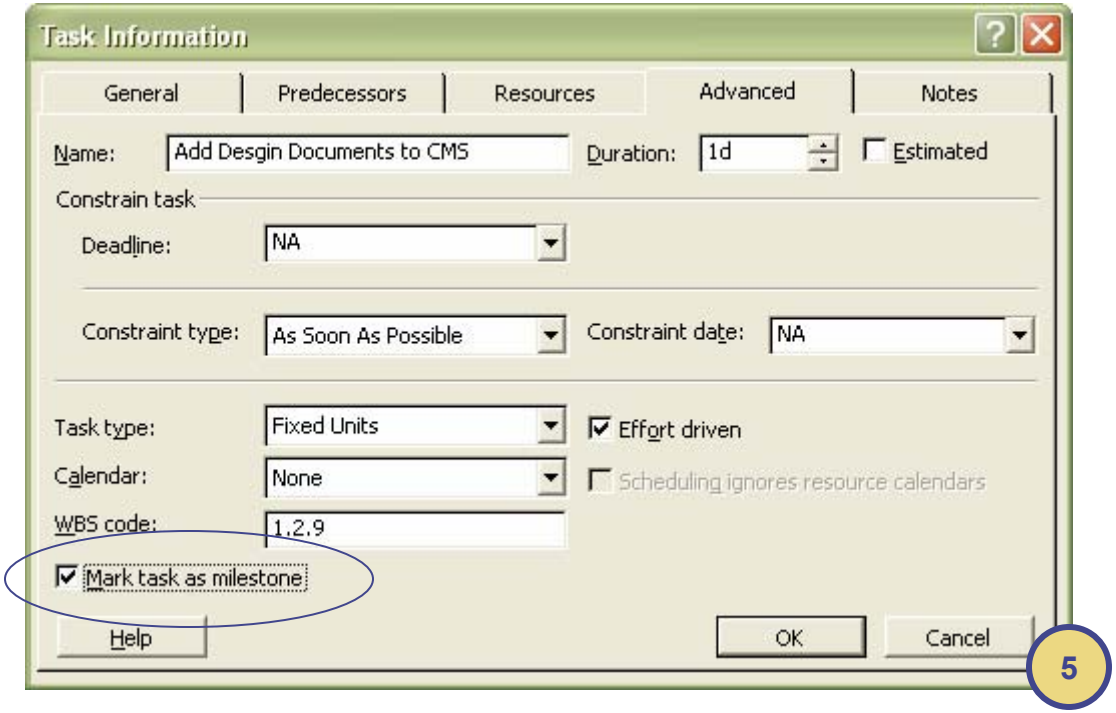
The final result should look like this

Step by Step Example (Step 2 – Add Tasks Continued)

	Task Name	Duration	Start	Finish	Predecessors
1	**System Testing Plan MCY-ADTT-ST-2002-01**	**31 days**	**Mon 12/2/02**	**Mon 1/13/03**	
2	**Definition Phase**	**3 days**	**Mon 12/2/02**	**Wed 12/4/02**	
3	RSD Analysis	3 days	Mon 12/2/02	Wed 12/4/02	
4	**Design Phase**	**28 days**	**Thu 12/5/02**	**Mon 1/13/03**	
5	Develop Test Plan	5 days	Thu 12/5/02	Wed 12/11/02	3
6	Develop Test Design Spec.	8 days	Thu 12/12/02	Mon 12/23/02	5
7	Develop Test Case Spec.	5 days	Tue 12/24/02	Mon 12/30/02	6
8	Develop Test Procedure Spec.	3 days	Tue 12/31/02	Thu 1/2/03	7
9	Develop Test Item Transmital Report	1 day	Fri 1/3/03	Fri 1/3/03	8
10	Prepare Tools and test Scripts	3 days	Mon 1/6/03	Wed 1/8/03	9
11	Review Test Plan and Attachments	2 days	Thu 1/9/03	Fri 1/10/03	10
12	Check - System is Ready to be Tested	1 day	Thu 1/9/03	Thu 1/9/03	10
13	Add Desgin Documents to CMS	1 day	Mon 1/13/03	Mon 1/13/03	11,12

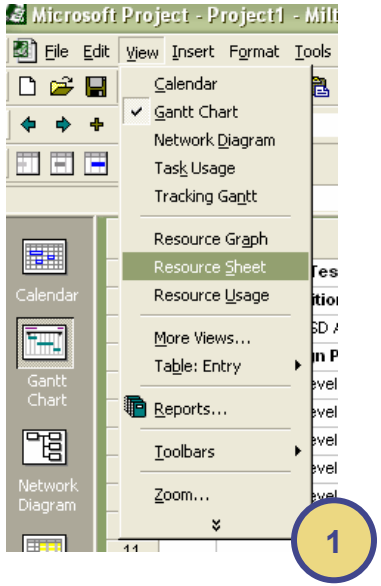


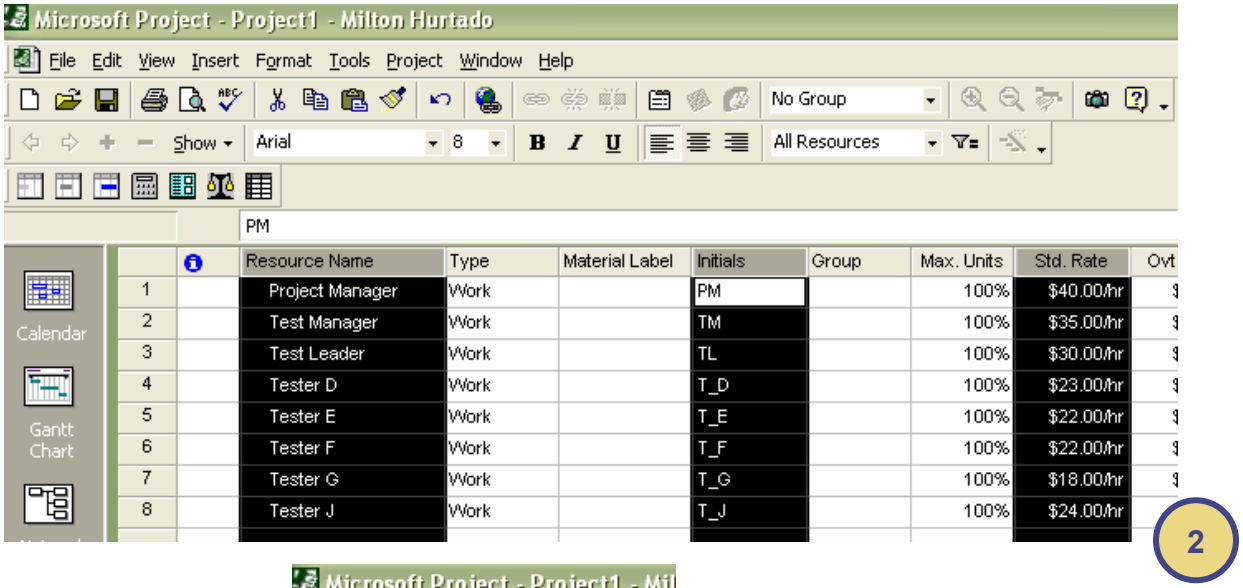
Step by Step Example (Step 2 – Add Tasks Continued)

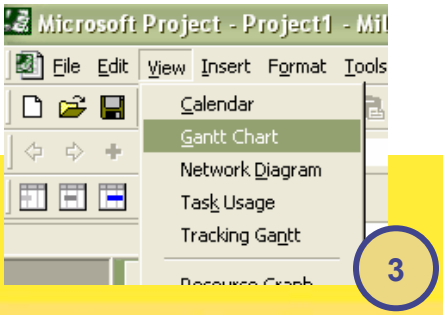


Step by Step Example (Step 3 – Add Resources)

1. Got to the view “Resource Sheet”
2. Add the necessary resources to the “Resources Sheet”, we are going to use only the Name, Initials and Standard Rate in $/hr. The resources are going to be taken from the table showed at the beginning of the example, more specifically from the column “Responsibilities”
3. Now, with the Resources already register in the project file, go back to the View “Gantt Chart”

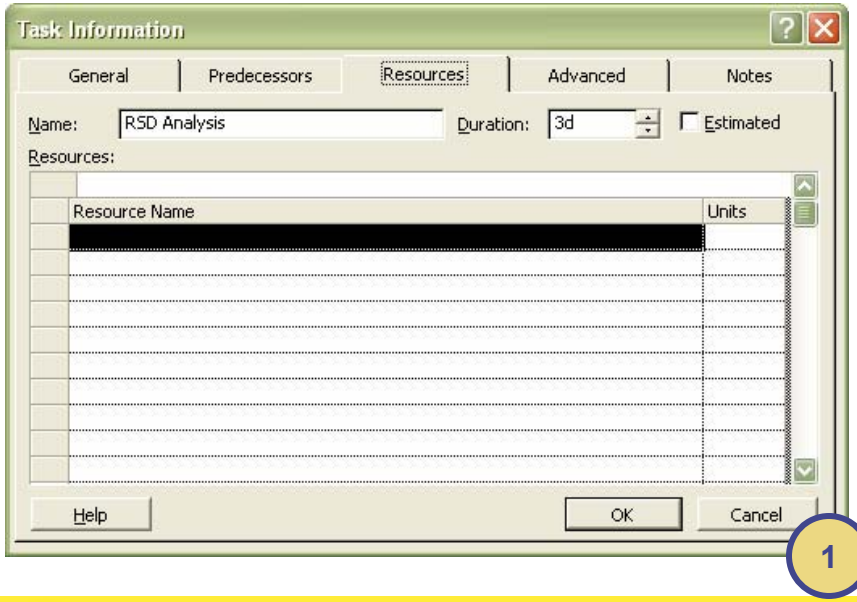


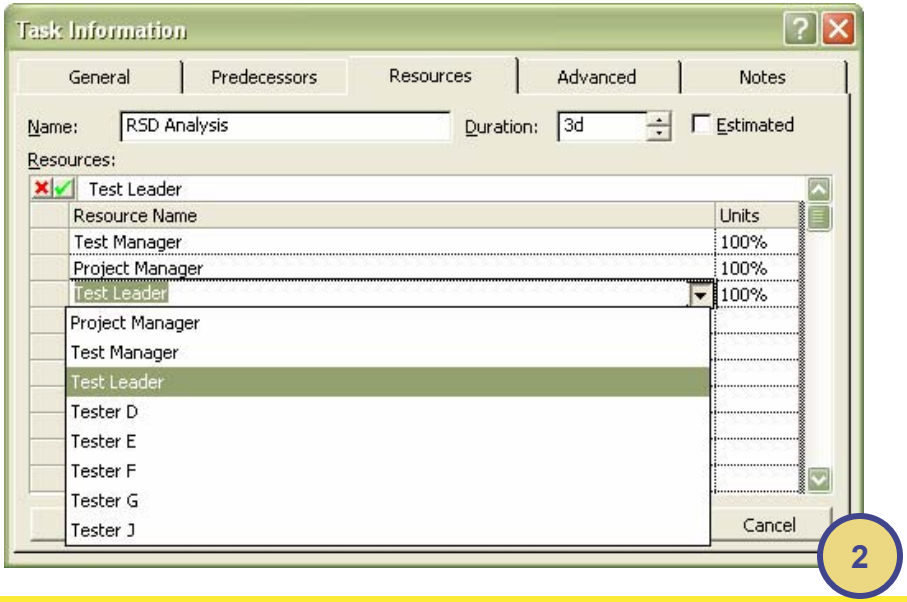




Step by Step Example (Step 4 – Assign Resources)

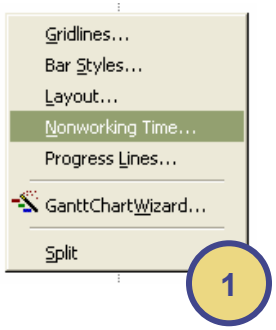
1. Double click the task you want to link to resources available in the “Resource Sheet”
2. Then got to the Tab “Resources” and look up the resources you want to relate to the activity (For the example lets keep the amount of effort of each Resources as 100%, Leveling Resources wont be covered in this tutorial), finally Click the “Ok” button to finish the assignment.
3. Repeat steps 1 and 2 for the rest of the tasks

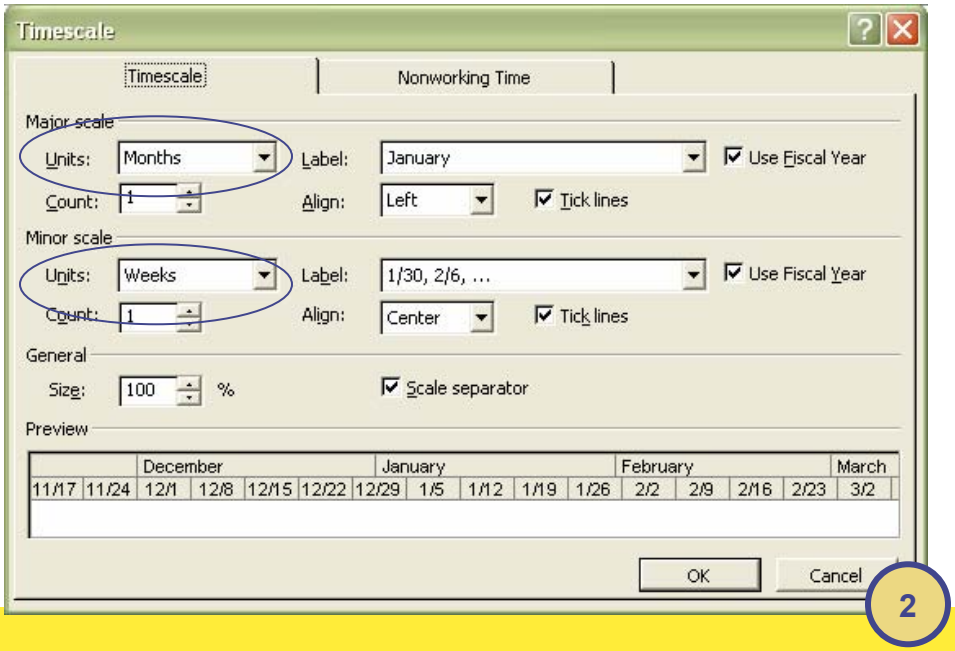




Step by Step Example (Step 5 – Adjust the Gantt Chart)

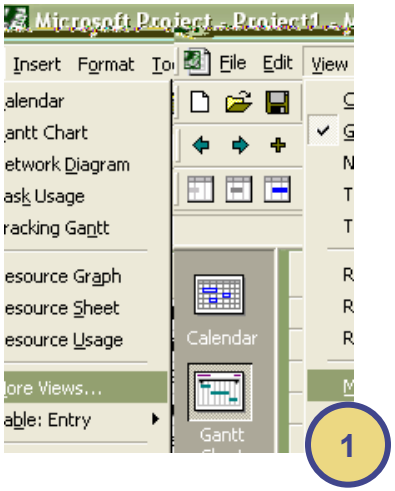
1. Adjust the length of the Gantt Chart such that it can be seen in one screen (If Possible), to do this perform a Right Click on top of the Gantt Chart first, a pop-up menu will appear, select the option “Networking Time…”
2. In the form that will open go to the tab “Time Scale” and Change the **Major Scale Units** to “Months” and the **Minor Scale Units** to “Weeks”, then press the “Ok” button to see the results in the Gantt Chart. (Adjust as necessary the scales once you are familiar with them)

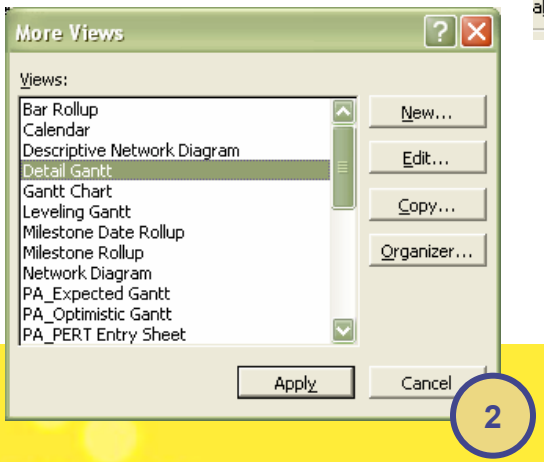




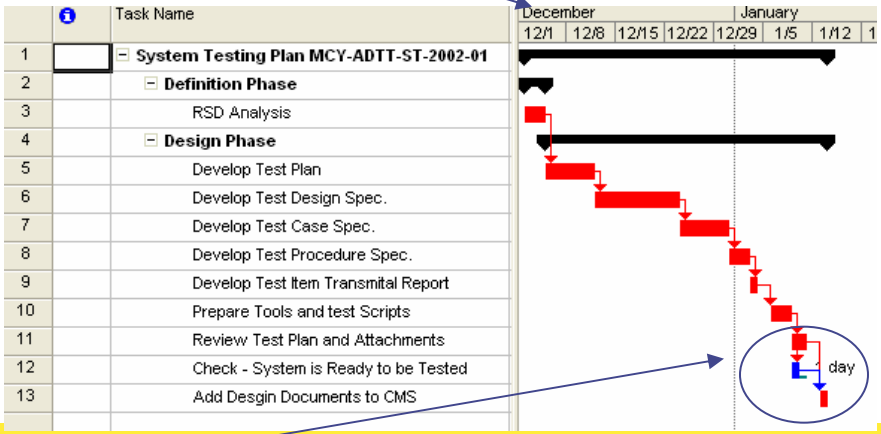
Step by Step Example (Step 6 – View the Critical Path)

1. For the example, we are going to use the Detailed Gantt Chart to view the Critical Path, because this option also shows the **Slack Time** of the activities that don't belong to the critical path, therefore first we have to select the option "More Views"
2. Then we have to select the Detail Gantt to obtain the view desired (Adjust the Gantt Chart as explained before if is necessary)





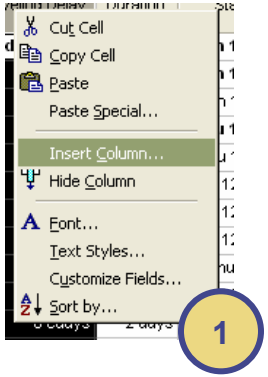
The View should look like this (If the Gantt Chart, doesn't appear check that you are in the right date on the Gantt Chart)

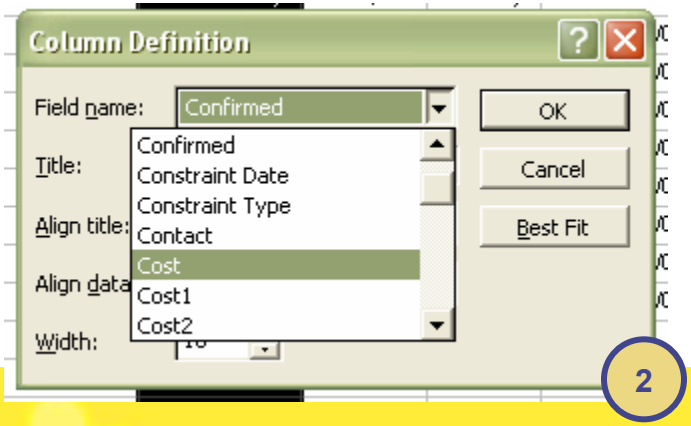


Slack Time (Activities in Blue are not part of the Critical Path)

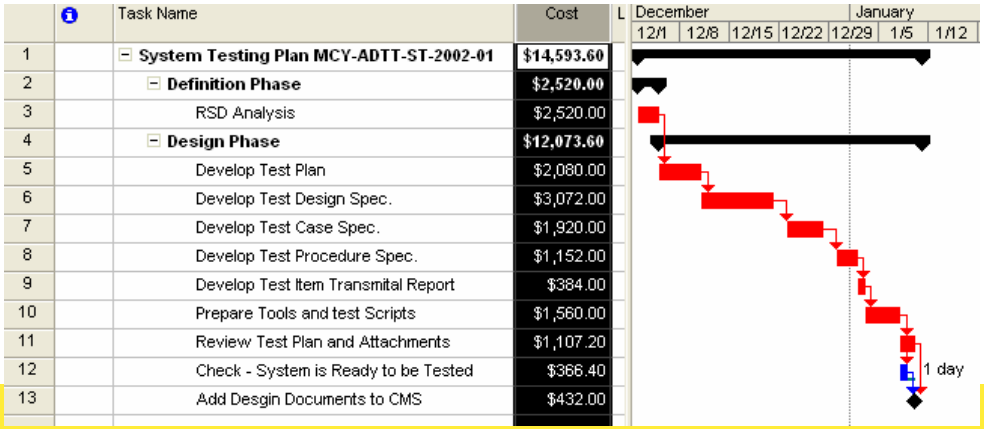
Step by Step Example (Step 7 – Show More Columns)

1. We can show more information, related to the tasks, in the spreadsheet, one column that might be of general interest is the cost, to do this first perform a Right Click on top of the spread sheet (Specifically In the titles of the Columns), a pop-up menu should appear showing several options, chose the one that says “Insert Column”
2. Then lookup the column named “Cost” and then press the “Ok” button





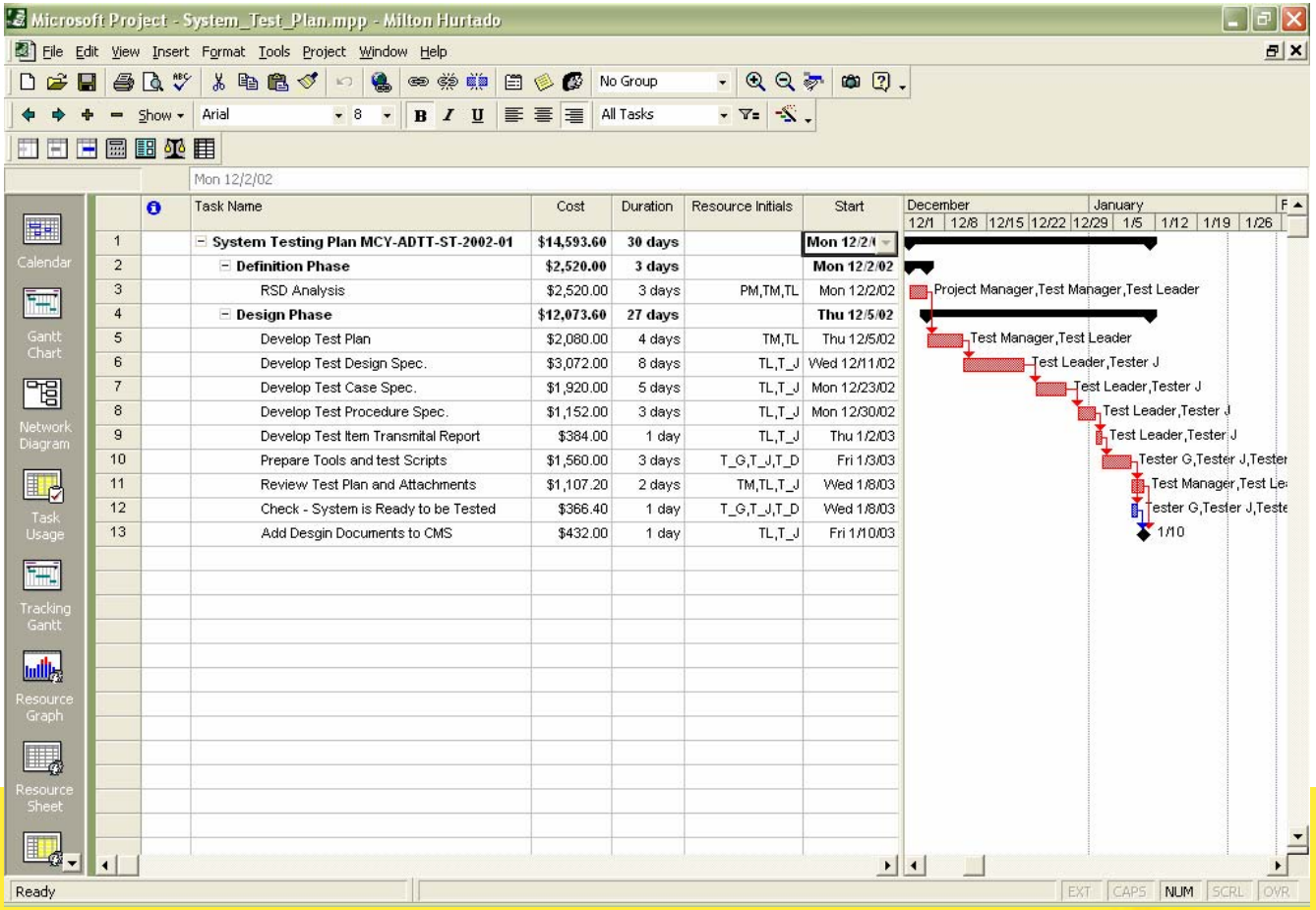
Now you should see the “Cost” Column, this cots is calculated based on the resources allocated for each Task, notice also that the groups automatically add up the cost of the subtasks making the view even more interesting.



	Task Name	Cost
1	System Testing Plan MCY-ADTT-ST-2002-01	$14,593.60
2	Definition Phase	$2,520.00
3	RSD Analysis	$2,520.00
4	Design Phase	$12,073.60
5	Develop Test Plan	$2,080.00
6	Develop Test Design Spec.	$3,072.00
7	Develop Test Case Spec.	$1,920.00
8	Develop Test Procedure Spec.	$1,152.00
9	Develop Test Item Transmital Report	$384.00
10	Prepare Tools and test Scripts	$1,560.00
11	Review Test Plan and Attachments	$1,107.20
12	Check - System is Ready to be Tested	$368.40
13	Add Desgin Documents to CMS	$432.00

Step by Step Example (Step 8 – A Better View)

As explained before, you can add and hide columns from the Spread sheet, this lets you show exactly what the people needs to see, below is a view with selected fields: Name, Cost, Duration, Resource initials and Start Date. The reader is welcome to experiment with this features and to explore more views that are offered by MS Project, such as resources usage, cost reports, etc.



Step by Step Example (Step 9 –Save the File)

1. For this example we are saving the file at the end, but it is recommended that you save the file frequently while you are working to avoid losing data as a result of problems such as a Power Failure for instance.
2. You can chose between saving the file with or without Baseline (the difference was explained before in this Tutorial)