



# Managing Projects with MS Project 2010



## Session: 14

### Customizing Project Appearance



# Objectives

- ◆ Explain how to change the look of taskbars
- ◆ Explain how to apply a new style to Gantt charts
- ◆ Explain formatting of Network Diagram task boxes
- ◆ Describe how to format the layout of various views
- ◆ Explain how to make changes to the gridlines in a view
- ◆ Explain how to add graphics to a project

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# Introduction

- ◆ The various views and **Gantt Charts** in MS Project provide all the information that project managers need to track and monitor a project.
- ◆ Project managers can apply formatting to the taskbars, **Gantt Charts**, as well as views to present information in a more structured and attractive layout.
- ◆ Such structured formatting is useful for presenting status reports to clients or in status meetings.



# Formatting the Gantt Chart

- ◆ Graphic representation of the project schedule is illustrated on the right panel in a **Gantt Chart**.
- ◆ By default, all taskbars in the **Gantt Chart** are displayed in blue.
- ◆ Project managers can format various elements of the **Gantt Chart** to bring better emphasis on certain statistics and for visual appeal.
- ◆ MS Project 2010 has replaced the **Gantt Chart** wizard available in the previous versions with a Format tab that contains all the formatting options related to the **Gantt Chart**.
- ◆ Project managers can format the various types of taskbars, and specify their color and display style.

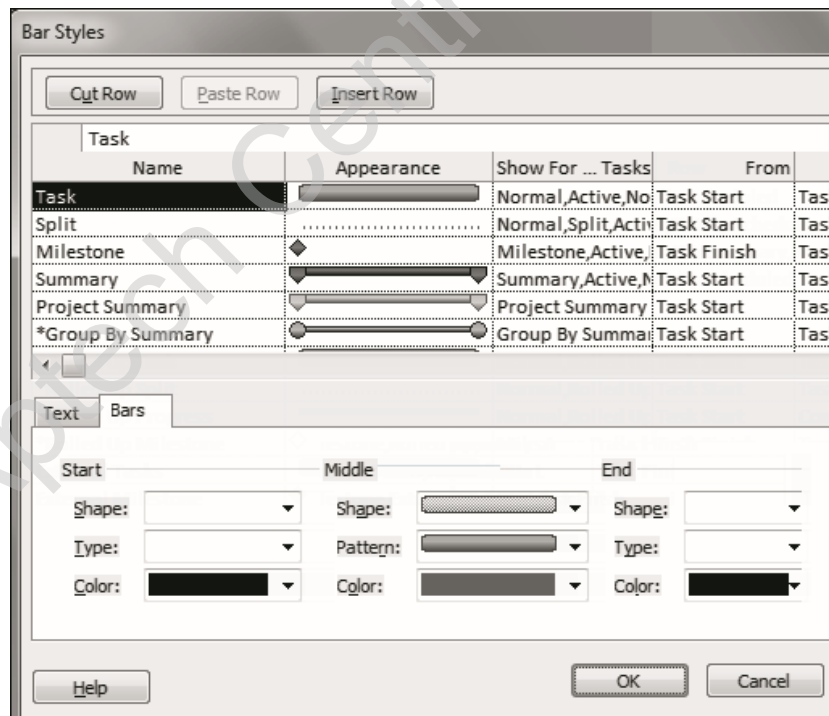


# Formatting Taskbars 1-3

- ◆ The Gantt Chart in MS Project depicts the project status through a variety of taskbars, such as Summary, Milestone, Split, Critical, Slack, and so forth.
- ◆ Project managers can specify formatting for each of these taskbars by performing the following steps:

1

- In the **Bar Styles** group on the **Format** tab, click the **Format** button and select **Bar Styles** from the drop-down menu. This displays the **Bar Styles** dialog box as shown in the following figure:





# Formatting Taskbars 2-3

2

- In the **Name** column, select the type of taskbar to format.

3

- In the **Show For ...Tasks** column for the selected task, select criteria for the task, such as **Critical** or **Finished**.

4

- On the **Bars** tab in the dialog box, select a shape for the start, middle, and end parts of the taskbar from the **Shape** drop-down lists for each part.

5

- From the **Type** drop-down lists, select the pattern for the starting and ending of the taskbar.

6

- In the **Pattern** drop-down list, select the fill pattern for the middle part of the taskbar.

7

- Click the **Color** drop-down lists and select a color for the start, middle, and end parts respectively of the taskbar from the color palette.

8

- Click the **Text** tab and select an alignment position for the text against taskbars, in the **Gantt Charts**.

9

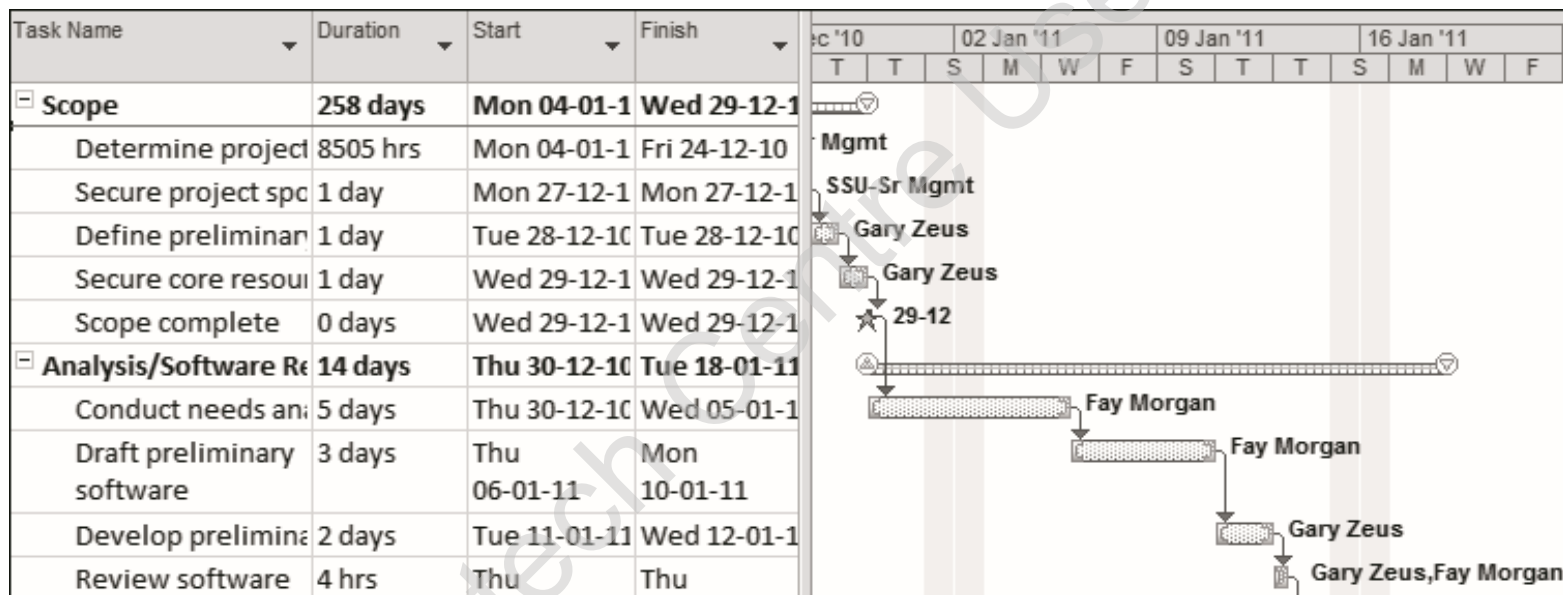
- Repeat the steps from 2 to 8 for all types of taskbars to format.



# Formatting Taskbars 3-3

10

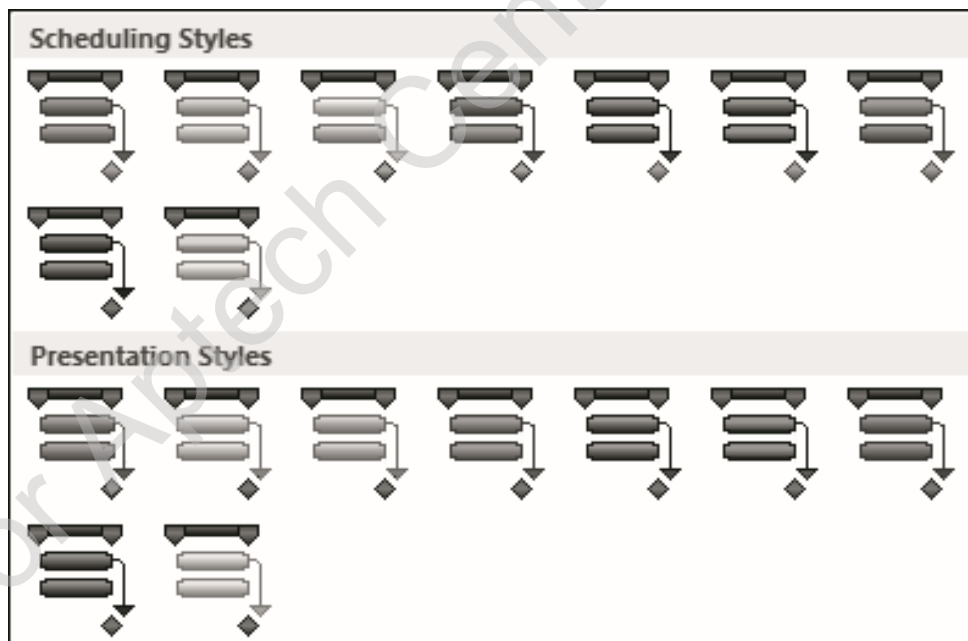
- Click **OK** to apply the formatting changes for the taskbars as shown in the following figure:





# Changing the Gantt Chart Style

- ◆ By default, **Gantt Charts** in MS Project follow a blue and red color scheme for the taskbars. It depicts all taskbars in shades of blue and red.
- ◆ To change the color scheme for the Gantt Chart, on the **Format** tab of the Ribbon, in the **Gantt Chart** Style group, click the **Gantt Chart Style** list box.
- ◆ This displays two sets of color schemes, **Scheduling Styles** and **Presentation Styles**.
- ◆ Following figure displays the **Scheduling Styles** and **Presentation Styles** color schemes in the **Gantt Chart** Style list box:







# Formatting Views

- ◆ Apart from the Gantt Chart, users can specify formatting for the various views.

**Users can specify formatting for the following elements of any view:**

**Text**

**Gridlines**

**Layout**

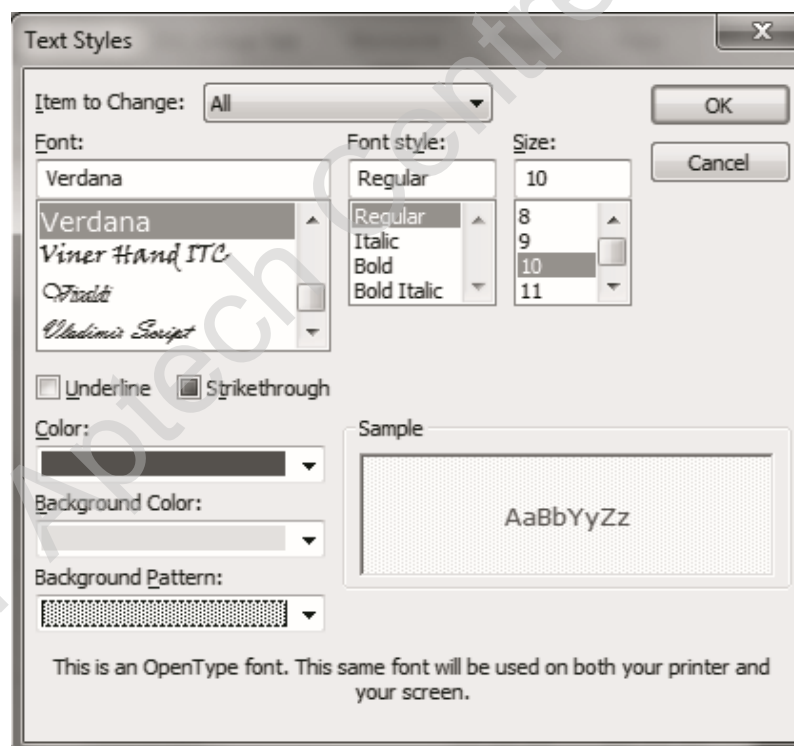
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# Formatting Text in Project Views 1-2

- ◆ Users can specify the font style, font size, color, background, and other such formatting for the text in the views.
- ◆ Perform the following steps to format the text in a view in MS Project:

In the **Format** group on the Format tab for **Gantt Chart** Tools, click the **Text Styles** button to display the **Text Styles** dialog box. Here, one can specify various settings for text styles as shown in the following figure:





## Formatting Text in Project Views 2-2

From the **Item to Change** drop-down list, users can select the task type for which they want to change the text formatting. Selecting **All** applies the formatting to all text available in the views, both in the views table as well as the **Gantt Chart**.

In the **Font** list box, select the required font style.

Specify the required font style and font size from the respective list boxes.

Specify additional formatting such as underline or strikethrough for the selected task type, if required.

Select the required text color, background color, and background pattern from the respective drop-down lists.

Click **OK** to apply the text formatting to the current view as shown in the following figure:

Task Name	Start	Finish	26 Dec '10	23	
			S	I	M
- Scope	Mon 04-01-10	Wed 29-12-10			
Determine project scope	Mon 04-01-10	Fri 24-12-10			
Secure project sponsorsh	Mon 27-12-10	Mon 27-12-10			
Define preliminary resour	Tue 28-12-10	Tue 28-12-10			
Secure core resources	Wed 29-12-10	Wed 29-12-10			
Scope complete	Wed 29-12-10	Wed 29-12-10			
- Analysis/Software Requirer	Thu 30-12-10	Tue 18-01-11			
Conduct needs analysis	Thu 30-12-10	Wed 05-01-11			

The Gantt chart displays a sequence of tasks with dependencies. The first task is 'SSU-Sr Mgmt' (26 Dec '10 to 23 Dec '10). It is followed by 'SSU-Sr Mgmt' (23 Dec '10 to 29 Dec '10), 'Gary Zeus' (29 Dec '10 to 29 Dec '10), 'Gary Zeus' (29 Dec '10 to 29 Dec '10), and '29-12' (29 Dec '10 to 29 Dec '10). The final task is 'Fay Morgan' (29 Dec '10 to 29 Dec '10). The chart uses arrows to show dependencies between tasks.

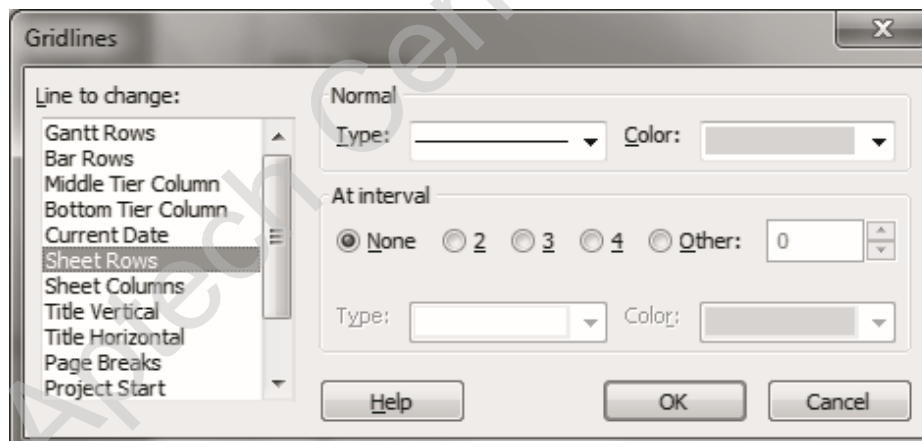


# Applying Gridlines 1-2

- ◆ Project managers can display gridlines on the Gantt Chart to break up the scheduling display into chunks.
- ◆ Users can also specify the color and style for the gridlines.
- ◆ Perform the following steps to apply gridlines to Gantt Charts in MS Project:

1

- In the **Format** group on the **Format** tab for **Gantt Chart Tools**, click the **Gridlines** button to display the **Gridlines** dialog box. This dialog box enables to specify various options for gridlines as shown in the following figure:



2

- From the **Line to change** list box, select the type of gridline to display and format in the **Gantt Chart**.



## Applying Gridlines 2-2

3

- From the **Type** drop-down list, select the line style to use when displaying the selected gridline.

4

- Click the **Color** drop-down list to display a color palette and select the desired color for the selected gridline.

5

- For certain types of gridlines such as **Sheet Rows**, **Sheet Columns**, and **Gantt Rows**, users can choose to display the gridlines at specific intervals, in contrasting colors.

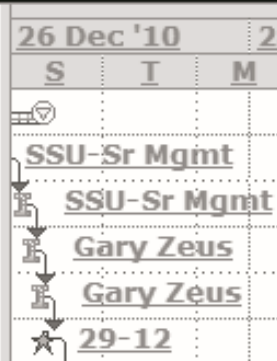
6

- Specify the line style and contrasting color for the interval lines in the **Type** and **Color** drop-down lists, respectively.

7

- Click **OK** to apply the gridlines with the specified formatting to the Gantt Chart as shown in the following figure:

Task Name	Start	Finish	26 Dec '10			2
			S	I	M	
[-] Scope	Mon 04-01-10	Wed 29-12-10				
Determine project scope	Mon 04-01-10	Fri 24-12-10				
Secure project sponsorsh	Mon 27-12-10	Mon 27-12-10				
Define preliminary resour	Tue 28-12-10	Tue 28-12-10				
Secure core resources	Wed 29-12-10	Wed 29-12-10				
Scope complete	Wed 29-12-10	Wed 29-12-10				





# Formatting Layout 1-2

- ◆ MS Project users can also format the layout of the views.
- ◆ To format the layout of views in MS Project, in the Format group on the **Format** tab for **Gantt Chart Tools**, click the Layout button, to display the **Layout** dialog box.
- ◆ The contents of the **Layout** dialog box vary depending on the type of view for which the layout is being modified.

Options for formatting the layout of a Gantt Chart view are as follows:

Links	Date Format	Bar Height	Always Roll Up Gantt Bars	Round Bars to Whole Days	Show Bar Splits	Show Drawings
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## Formatting Layout 2-2

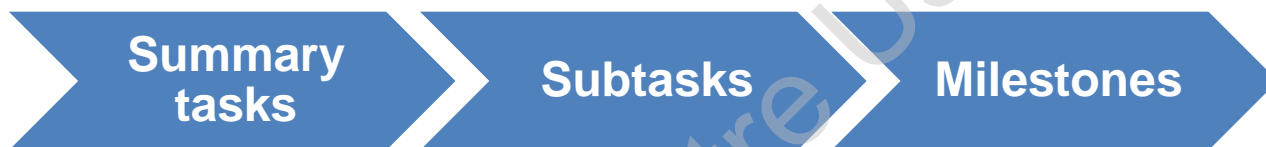
- ◆ Following figure displays the Layout dialog box for a **Gantt Chart** view:





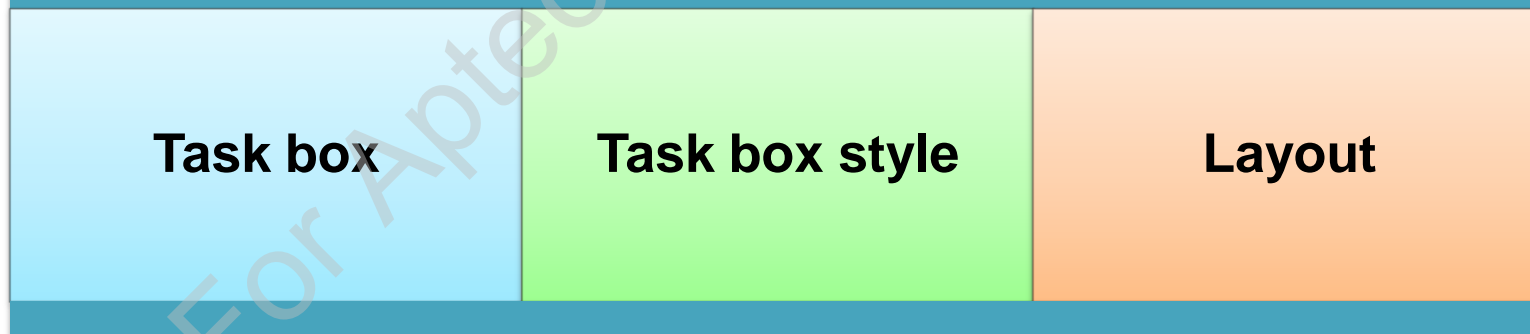
# Formatting Network Diagram View

- ◆ Project managers often use network diagrams to present the project plan and its status in status meetings and client reports.
- ◆ The Network Diagram view represents various types of tasks in different shapes such as:



- ◆ For each task type, the critical tasks have a red background while noncritical tasks have a blue background.

**Users can apply the following types of formatting to the Network Diagram view:**







# Formatting Task Boxes 1-2

- ◆ Users can format and modify a selected task box by performing the following steps:

Display the Network Diagram view by selecting it from the **Gantt Chart** drop-down menu in the **View** group on the **Task** tab.

Select the task box to modify and click the **Box** button in the **Format** group on the **Format** tab for **Network Diagram Tools**, to display the **Format Box** dialog box.

From the **Data** template drop-down list, select the desired box design template. Users can click the **More Templates** button adjacent to the drop-down list for additional box designs.

In the **Border** section, specify a shape, border color, and a line style for the task box.

In the **Background** section, select the background color and a background fill pattern for the selected task box.

Click **OK** to apply the formatting changes to the task box.



## Formatting Task Boxes 2-2

- ◆ Following figure displays the Format Box dialog box for the Network Diagram view.

**Format Box**

**Preview**

Design	
Start: 19-01-11	ID: 17
Finish: 08-02-11	Dur: 14,5 days
Comp: 0%	

**Data template**

Summary More Templates...

**Border**

Shape: ▭ Color: ■ Width: —

☒ Show horizontal gridlines ☐ Show vertical gridlines

**Background**

Color: ■ Pattern: ▭

Reset OK Cancel

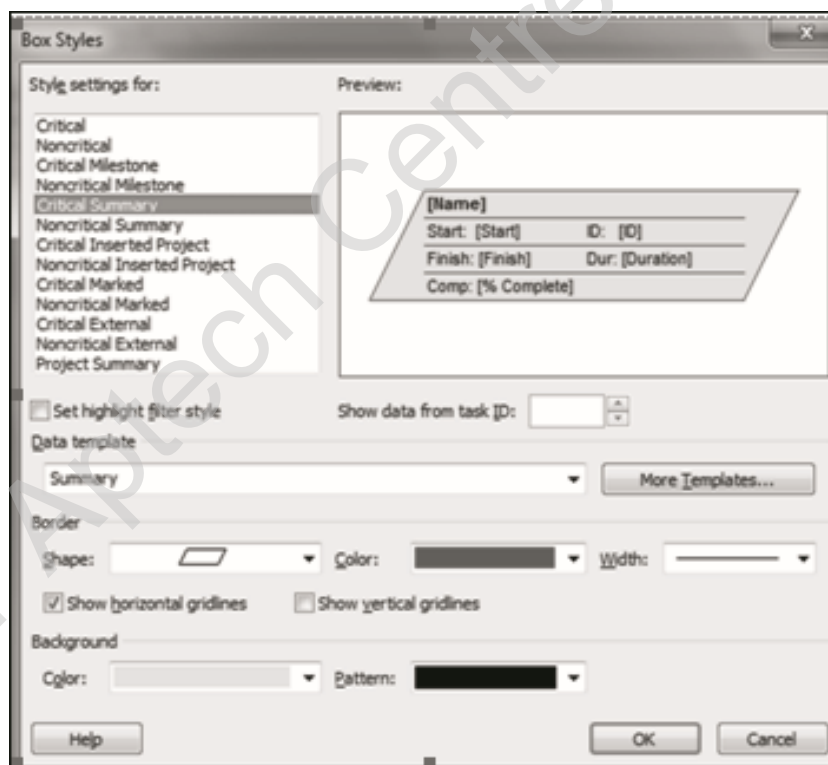


# Formatting Task Box Styles 1-2

- ◆ Users can format the box style of all task boxes of a specify type of task by performing the following steps:

With the Network Diagram view displayed, click the **Box Styles** button in the **Format** group on the **Format** tab for **Network Diagram Tools**, to display the **Box Styles** dialog box.

- ◆ Following figure displays the **Box Styles** dialog box for the Network Diagram view:





## Formatting Task Box Styles 2-2

From the **Style settings for** list, select the task type to specify its formatting. The adjacent **Preview** box displays a preview of the existing task box formatting for the selected task type.

In the **Border** section, specify a shape, border color, and a line style for the task box.

In the **Background** section, select the background color and a background fill pattern for the selected task box.

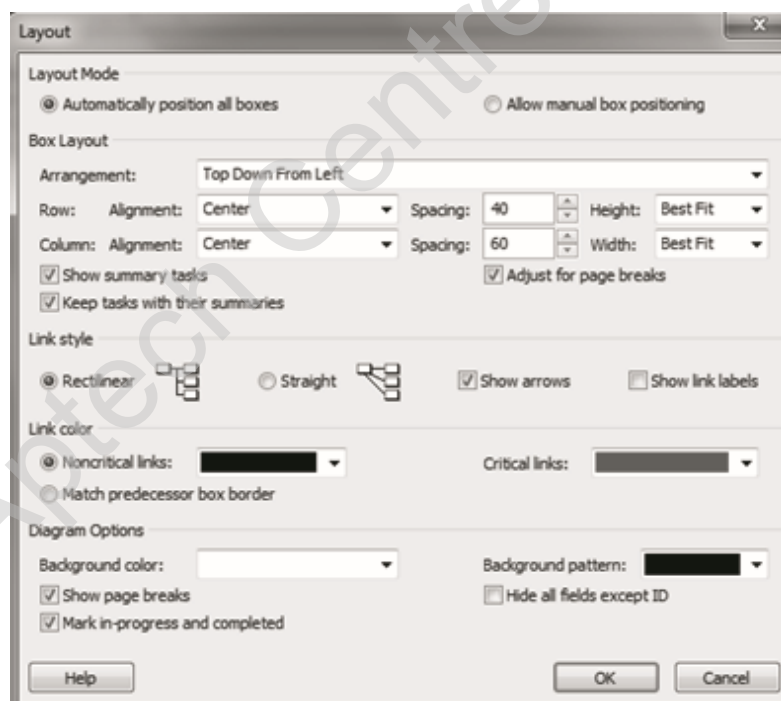
Click **OK** to apply the formatting changes to all task boxes of the selected task type, in the network diagram.

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# Formatting the Network Diagram Layout 1-2

- ◆ In addition to formatting task boxes, users can also specify formatting for the layout of the Network Diagram view in the Layout dialog box.
- ◆ Click the **Layout** button in the **Format** group on the **Format** tab for **Network Diagram Tools**, to display the **Layout** dialog box.
- ◆ Following figure displays the **Layout** dialog box for the **Network Diagram** view:





## Formatting the Network Diagram Layout 2-2

- ◆ Users can specify the following layout settings for the Network Diagram view:

**Layout Mode**

**Box Layout**

**Link Style**

**Link Color**

**Diagram Options**



# Formatting the Calendar View

- ◆ The Calendar view in MS Project is similar to the Calendar view in Outlook, displaying weekly and monthly views of the project tasks.
- ◆ Just as in all other views, users can format the text and display styles in the Calendar view.
- ◆ To display the Calendar view, perform the following steps:

In the **View** group, click **Gantt Chart** and then **More Views**.

Select **Calendar** in the **More Views** dialog box.

**MS Project allows users to format the following elements of the Calendar view:**

**Text styles**

**Bar styles**

**Layout**



# Formatting Text Styles in Calendar View

- ◆ Users can format the text in the calendar view to display it in a specific font, font style, font size, and font color.
- ◆ Users can also specify a background color and background fill pattern for the view.
- ◆ They can select to apply the specified text formatting to all task types in the calendar or a specific type of task in the calendar.
- ◆ Users can specify the text formatting for Calendar view in the Text Styles dialog box, which is displayed by clicking the Text Styles button on the Format tab for Calendar Tools.
- ◆ The Text Styles dialog box for Calendar view is exactly similar to the Text Styles dialog box for Gantt Chart view.



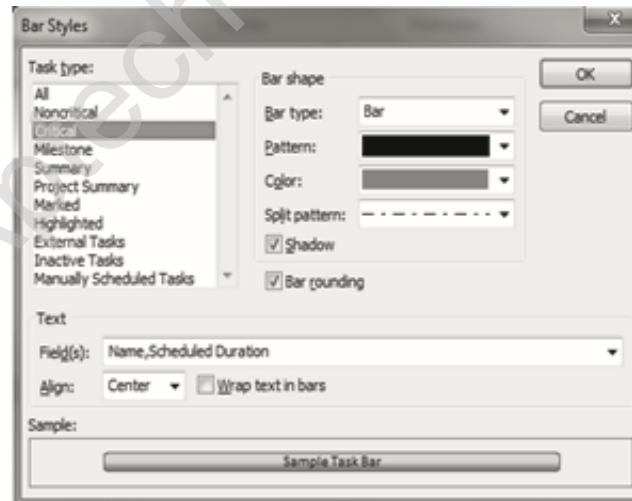


# Formatting Bar Styles in Calendar View

- ◆ The Calendar view displays taskbars along with task description depicting the task schedules.
- ◆ By default, all types of tasks in the Calendar view are displayed in blue.
- ◆ Users can specify formatting to display different types of taskbars in different colors for better emphasis.
- ◆ To format taskbars in the Calendar view, click the Bar Styles button on the Format tab for Calendar Tools to display the Bar Styles dialog box.
- ◆ Users can specify the following categories of formatting options for the taskbars:



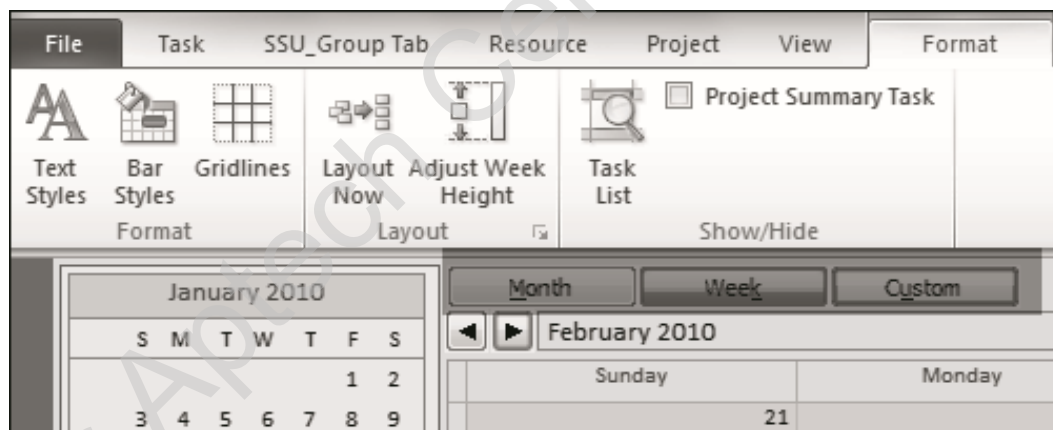
- ◆ Following figure displays the Bar Styles dialog box for formatting the taskbars in the Calendar view:





# Specifying Calendar View Layouts 1-2

- ◆ Project managers can display the Calendar view in three different types of layouts, Month, Week, and Custom.
- ◆ Clicking the **Month** and **Week** buttons just above the Calendar view displays the project tasks in monthly and weekly time intervals, respectively.
- ◆ Click the forward and back buttons just below the layout buttons to navigate forward and backward through the selected intervals.
- ◆ Following figure displays the three layout buttons in the Calendar view:

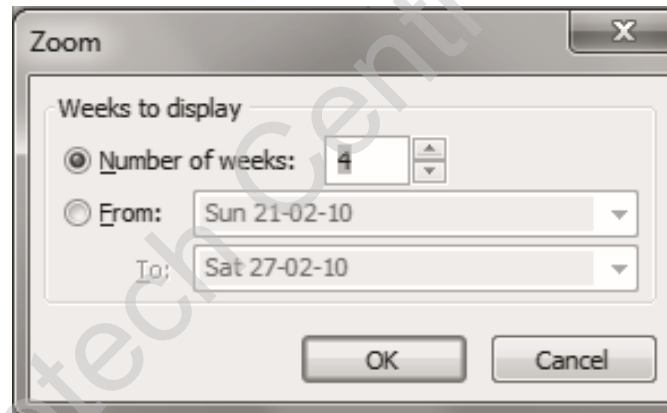


- ◆ Clicking the Custom button in the Calendar view displays the Zoom dialog box.
- ◆ Users can specify a custom interval for displaying project information.



## Specifying Calendar View Layouts 2-2

- ◆ Select the Number of weeks radio button and specify the time interval in number of weeks for which the Calendar view should be displayed.
- ◆ Alternatively, specify the start and finish dates for the interval for which the Calendar view should be displayed.
- ◆ Following figure displays the Zoom dialog box for specifying a custom interval layout:





# Graphics in Project Views 1-2

- ◆ Graphics help enhance the look of any document and can be used to emphasize or draw attention to specific information.
- ◆ Project managers can use the drawing tool on the **Format** tab for **Gantt Chart Tools** to draw images on the **Gantt Chart** in MS Project.
- ◆ The project manager can solve this as follows by drawing a circle around the problem area in the project plan in the **Gantt Chart**:

1

- Click the **Drawing** button in the **Drawings** group on the **Format** tab.

2

- Select the oval shape from the drop-down menu and drag the mouse over the problem area to draw the shape.

3

- The shape is displayed in solid white, hiding the text on the project plan. To display the text through the shape and format the object as an outline around the text, click the **Drawing** button on the **Format** tab again.

4

- Select the **Send to Back** option from the drop-down menu.



## Graphics in Project Views 2-2

- ◆ Perform the following steps to format the shape:

1

- Select the shape, click the **Drawing** button on the **Format** tab, and select **Properties** from the drop-down menu to display the **Format Drawing** dialog box.

2

- In the **Line** section, select the desired line color from the Color drop-down list.

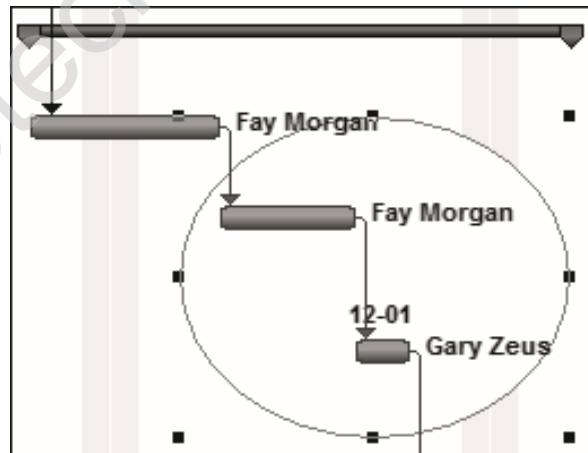
3

- In the **Line** section, select the desired line width to give the shape a thicker outline.

4

- Click **OK** to apply the formatting changes.

- ◆ Following figure displays a red oval highlighting a part of the project schedule in the Gantt Chart:





# Summary

- ◆ MS Project allows project managers to format and enhance the appearance of the Gantt Chart views and Network Diagram views.
- ◆ Project managers can format various types of taskbars in the Gantt Chart view and specify their color and display style.
- ◆ Managers can change the color schemes for the taskbars in the Gantt Chart view.
- ◆ Managers can format text in views, apply gridlines, and format the layout for the Gantt Chart view in MS Project.
- ◆ Managers can format the task boxes, task boxes style, and layout of the tasks in the Network Diagram view.
- ◆ Managers can also format the text styles, bar styles, and layouts in the Calendar view.
- ◆ Project managers can present attractive Gantt Charts by enhancing them with graphics to highlight specific sections of the chart.