INF09101 Project Management for Information Systems

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Lab 3: Working with automatically scheduled tasks and setting up project resources

Changing your task scheduling from manual to automatic

MS Project sets new tasks as manually scheduled by default. This is what you used in Lab 2 to learn the basics and quickly capture some details without scheduling tasks. By working with automatically scheduled tasks, MS Project updates calculated schedule values such as task durations, start dates, and finish dates automatically in response to any changes in a plan. Changes to factors such as constraints, task relationships, and calendars can also cause MS Project to recalculate affected tasks. In this Lab, you will convert tasks to automatic scheduling and then change the default scheduling mode to have new tasks automatically scheduled in future.

1. Open your Coursework Plan that you created in Lab 2.
2. Select the names of the all non-summary tasks (but leave the last task unselected for instruction 4 below). These tasks are currently manually scheduled, as indicated by the push-pin indicator in the Task Mode column. (There may also be a '?' to indicate that the type of scheduling has to be confirmed. You will be changing these to scheduled tasks in the following steps.)
3. On the **Task** tab, in the **Tasks** group, click **Auto Schedule**. MS Project switches these tasks to be automatically scheduled and changes the Task Mode icons and formatting of the tasks' Gantt bars to indicate that they are now automatically scheduled.
4. You will now use a different method to change the scheduling mode for a task. Click the **Task Mode** field of the unchanged task (as per instruction 2 above), and then click the arrow that appears.
5. In the list that appears, click **Auto Scheduled**. Note the effect of the changes on the plan in the Gantt chart.

Checking the duration and finish date of the plan

At any time in the planning or execution of a project, you and other project stakeholders will want to check how long the project is expected to take. You have already entered a project start date (Lab 2) but you don't need to enter a total project duration or finish date in a plan. MS Project calculates these values based on the task durations, dependencies, project calendar adjustments, and many other factors you have recorded in a plan. An easy way to view the plan's duration and scheduled start and finish dates is via the Timeline view, the project summary task, and the Project Information dialog box. In this Lab exercise you will check the plan's overall duration and scheduled finish date based on the task durations and relationships you entered.

6. In the Timeline view above the Gantt chart view, note the plan's current start and finish dates. If the Timeline view is not visible: on the View tab, in the Split View group, select the Timeline check box.

7. On the **Project** tab, in the **Properties** group, click **Project Information**. The Project Information dialog box appears. Note the finish date of your project.
8. Click **Statistics to see more information about the duration.**
9. Click **Close** to close the Project Statistics dialog box.
10. Next you will display the project summary task in the Gantt chart view. Click anywhere in the Gantt chart view. With the focus now on the Gantt chart view, the contextual label of the Format tab changes to Gantt Chart Tools.
11. On the **Format** tab, in the **Show/Hide** group, select the **Project Summary Task** check box.
12. MS Project displays the project summary task at the top of the Gantt chart view with an ID of 0. Here you'll see the same duration and start and finish values displayed in Project Statistics as well as a Gantt bar that's drawn from the start and finish dates of the overall plan.

<u>Documenting tasks with notes and hyperlinks</u>

You can record additional information about a task in a note. To keep the task's name succinct, you can add details to a task note rather than to the task's name. That way, the information resides in the plan and can be easily viewed or printed. There are three types of notes: task notes, resource notes, and assignment notes. You can enter and review task notes on the Notes tab in the Task Information dialog box. Notes in MS Project support a wide range of text formatting options; you can even link to or store graphic images and other types of files in notes. Using hyperlinks allows you to connect a specific task to additional information that lies outside of the plan.

13. Select the name of the task '**Check the draft outline plan with the module tutor**' in your plan. Copy this text to put in the notes and then shorten the name of the task to **Check draft plan**
14. On the **Task** tab, in the **Properties** group, click **Notes**. You can also right-click the task name and click Notes in the shortcut menu that appears. MS Project displays the Task Information dialog box with the Notes tab visible.
15. In the **Notes** box, type (or paste the copied text) **check the draft outline plan with the module tutor.**
16. Click **OK**. A note icon appears in the Indicators column.
17. Point to the note icon for task 6. The note appears in a ScreenTip. For notes that are too long to appear in a ScreenTip, you can double-click the note icon to display the full text of the note.
18. Next, you will create a hyperlink. Right-click the name of a task you wish to add a link to (this might be a task about checking a company website), and then click **Hyperlink** on the shortcut menu. The Insert Hyperlink dialog box appears.
19. In the **Text to display** box, type a description of the link.
20. In the **Address** box, type the URL and click **OK**. A hyperlink icon appears in the Indicators column. Pointing to the icon displays the descriptive text you typed earlier.
21. To open the webpage in your browser, either click the hyperlink icon or right-click on the hyperlink icon and then, in the shortcut menu that appears point to Hyperlink, click **Open Hyperlink**.
22. To remove notes, hyperlinks or formatting from selected tasks: On the Task tab, in the Editing group, click Clear (looks like an eraser), and then select the command you want.
23. Save the Coursework Plan file.

<u>Setting-up Project resources in MS project</u>

MS Project 2013 supports three types of resources. Work resources are the people and equipment needed to complete the tasks. Cost resources are finances associated with a task e.g. categories of expenses like travel and entertainment. Material resources are consumables you use up as the project proceeds. In this lab, you will set up work and cost resources.

24. On the **View** tab, in the **Resource Views** group, click **Resource Sheet**.
25. You will use the Resource Sheet view to enter the list of resources for doing your group coursework project.
26. Click the cell directly below the **Resource Name** column heading.
27. Type the name of a member of your project, and press the Enter key. MS Project creates a new resource.
28. In the next empty rows in the **Resource Name** column, enter the names of the other members of your project. When you create a new work resource, Project assigns it 100% Max. Units by default.
29. These resources are all individual people. You can also have a resource that represents multiple people. In the **Resource Name** field, below the last resource, type the name of your resource group (e.g. Project Team), and then press Enter.
30. Change the resources maximum capacity (%) for this group resource to reflect the number of people in this resource (e.g. 400% for 4 people at 100% each). Click the **Max. Units** field for the group resource.
31. Type or select **400%**, and then press Enter.
32. Save the plan

    Note that instead of allocating resources by name you can *add them by Job role* e.g. Project Manager. [For your coursework assignment use roles and explain the role each person has in your proposal]

Changing the working times for individual project resources

33. In addition to the overall project calendar, you can also set the working times of individuals in your group in the resources calendar.
34. On the **Project** tab, in the **Properties** group, click **Change Working Time**. The Change Working Time dialog box appears.
35. In the **For calendar** box, select the name of one of your project members. The relevant resource calendar appears in the Change Working Time dialog box.
36. On the **Exceptions** tab in the Change Working Time dialog box, click in the first row directly below the **Name** column heading and type **working on another project**.
37. Click in the **Start** field, and enter or select *<a date when your resource is not available>*. To see the updated calendar preview in the dialog box, click in the **Finish** field. MS Project will not schedule work for this individual on the date you entered.
38. To conclude this exercise, you will set up a “4 by 10” work schedule (that is, 4 days per week, 10 hours per day) for a resource. In the **For calendar** box, select the name of one of your group resources.
39. If prompted to save the resource calendar changes you previously made, click **Yes**.
40. Click the **Work Weeks** tab in the Change Working Time dialog box.
41. Click **[Default]** directly under the **Name** column heading, and then click **Details**.
42. Next you will modify the default working week days and times for your selected group resource. Under **Select Day(s)**, select **Monday** through **Thursday**. These are the weekdays this individual can normally work.
43. Click **Set day(s) to these specific working times**.
44. Next you’ll modify this person’s regular daily schedule for the days he/she normally works.
45. In row 2, in the **To** column enter **19:00**, and then press Enter.
46. Finally, you will mark Friday as a nonworking day for this person. Click **Friday**.
47. Click **Set days to nonworking time**.

48. Now Project can schedule work for your chosen individual as late as 7 P.M. every Monday through Thursday, but it will not schedule work for him/her on Fridays.
49. Click **OK** to close the Details dialog box. You can see in the calendar in the Change Working Time dialog box that Fridays (as well as Saturdays and Sundays) are marked as nonworking days for that group member.
50. Click **OK** to close the Change Working Time dialog box. Because you have not yet assigned these resources to tasks, you don't see the scheduling effect of their nonworking time settings. You will assign resources in a later lab.
51. Save the plan.

Setting-up a cost resource

52. You will now add a cost resource for later use. In the Resource Sheet view, click the next empty cell in the **Resource Name** column.
53. Type **Travel** and press the Tab key.
54. In the **Type** field, select **Cost**. You will assign this cost resource to a task in a later lab.
55. Save the plan.

Adding notes to resources

You can record additional information about a task, resource, or assignment in a note. For example, if a resource has particular skills or constraints, it can be recorded in a note. That way, the note resides in the plan and can be easily viewed or printed. You previously entered a task note by clicking the Notes button on the Task tab of the Properties group. You can enter resource notes in a similar way (by clicking the Notes button on the Resource tab of the Properties group), but in this exercise, you will use a different method. You will use the Resource form, which allows you to view and edit notes for multiple resources more quickly. In this exercise, you'll enter notes in the Resource Form view.

56. In the **Resource Name** column, click the name of one of your project team members.
57. On the **Resource** tab, in the **Properties** group, click the **Notes** button.
58. In the **Notes** box, type Has previous experience of using MS project**.**
59. Click **OK**. In the Resource Sheet view, a note icon appears in the Indicators column.
60. Point to the note icon that appears next to the project team member's name in the Resource Sheet view. The note appears in a ScreenTip. For notes that are too long to appear in a ScreenTip, you can double-click the note icon to display the full text of the note. You can also see more of long notes in the Resource Form view or in the Resource Information dialog box.
61. Save and close the Coursework plan file**.**