INF09101 Project Management for Information Systems

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Lab 2: Starting your coursework plan

Create your project calendar (and dates when the team is not working on the project)

1. The next step is to set your project calendar. On the **Project** tab, in the **Properties** group, click **Project Information**. This opens the project information dialog box. In the **Calendar** box, click the down arrow.
2. Select the **Standard** calendar from the 3 options available (it is the default option) and **OK**. This is a traditional working day and week.
3. Exemptions to the standard calendar can be created. For example if you know the staff are all attending a training day or there is a public holiday. In the **Project** tab, in the **Properties** group, click **Change Working Time**. The Change Working Time dialog box appears.
4. In the **Name** field on the **Exceptions** tab in the lower portion of the dialog box, type Autumn Public Holiday, and then click in the **Start** field. (TIP: Although it is not compulsory, it is good practice to name the exception.)
5. In the **Start** field, enter the date of the holiday, and then click the **Finish** field or press the Right Arrow key. (TIP: You can also select the date you want in the calendar above the Exceptions tab or from the drop-down calendar in the Start field.)
   The date is now scheduled as nonworking time for the project. In the dialog box, the date appears underlined and colour formatting is applied to indicate an exception day.
6. Click **OK** to close the Change Working Time dialog box.
7. In this section, you made just one specific day a nonworking day for the entire plan. Other common examples of working time adjustments include: recurring holidays or other times off that follow a known pattern, such as weekly, monthly, or annually. To set up recurring nonworking times, click the **Details** button on the **Exceptions** tab in the **Change Working Time** dialog box.
8. Vary working times per week for your group, for example, to account for other commitments (such as lectures). To set up *custom work weeks*, on the **Work Weeks** tab of the **Change Working Time** dialog box, enter the date range you want, click the **Details** button, and then set the working time adjustments you want. (Note: You will see how to set unique working hours for an individual resource (i.e. member of the team) later in the labs.

Adding a title for your plan and setting other properties

9. Click the **File** tab. The Backstage view appears. The Info tab should be selected by default. On the right side of the screen, under Product Information, note the key statistics, such as the start date on the right side of the Backstage view. Notice that many of the fields you see here are the same fields you see in the Project Information dialog box. You can edit these

fields in either place. Set the start date as <today's date>. Note that you don't need to set the end date as this will be scheduled automatically.

10. Click **Project Information**. In the menu that appears, click **Advanced Properties**. The Properties dialog box appears with the Summary tab visible.
11. In the **Subject** box, enter the title of your group coursework plan (provide a meaningful descriptive title rather than something generic).
12. In the **Manager** box, enter the name of someone from your group (you can change this later if you wish).
13. In the **Company** box, enter the name for your group's IT company (the Company responding to the ITT).
14. In the **Comments** box, enter a description of what the plan is about.
15. Click **OK** to close the dialog box.
16. To conclude this part of the exercise, you will save the project file, and then close it. On the **File** tab click **Save**. Now close the file. (Tip: Remember to save and backup your group project plan regularly – think about how you would feel if you lost all your hard work)

Learning points so far:
Scheduling a plan from a start date (as opposed to a finish date) gives you the most flexibility.
You use calendars in Project to control when work can be scheduled to occur.
You should record file properties in a plan for later use when printing views and reports.

Entering manual tasks, durations and start/finish values

Tasks are the most basic building blocks of any project plan. They represent the work to be done to accomplish the goals of the project. Tasks describe work in terms of dependencies, duration, and resource requirements. In Microsoft Project 2013, there are different kinds of tasks including summary tasks, subtasks, and milestones. Tasks in MS Project are sometimes more generally called activities or work packages. Names of tasks should describe what will be done e.g. *Evaluate commercially available HR and Payroll software packages*.

The following instructions will take you through some examples of tasks but you need to create your own tasks from your reading of what is required in the coursework assignment. Start with the basics for now – you can add to your group coursework plan right up to the first deadline date. As a group decide what these tasks will be – *you need them for step 29! If you need help with this please ask the lab tutor.*

17. Click in the cell directly below the **Task Name**
18. Type Assign roles to team members, and then press the Enter key. The task you entered is given an ID number. Each task has a unique ID number, but it does not necessarily represent the order in which tasks will occur in the final plan. The indicator in the **Task Mode** column shows that this is a *manually entered task* and so no duration or date values will appear and there will be no bar in the Gantt chart. (You will use automatically scheduled tasks later on). Manually entered tasks are a good way to start as they create placeholders for editing later.
19. Now enter some more task names and press enter after each one.

20. Add a new task between 2 tasks that you have already entered. Click on the name of the task below the one you want to add (i.e. if you want to add a task in between tasks 2 and 3, click on task 3).
21. On the **Task** tab, in the **Insert** group, click Task. MS Project inserts a row for a new task and renumbers the subsequent tasks. MS Project names the new task <New Task>.
22. Select <New Task>, enter then name of your task and press Enter. The new task is added to your plan.
23. Now try deleting a task. Right-click on the task name and, in the shortcut menu that appears, click **Delete Task**.
24. Now you will add durations for your manually created tasks. Click the cell below the **Duration** column heading for task 1, Assign roles to team members. The Duration field for task 1 is selected.
25. Type **2d**, and then press Enter. (TIP: You can also click the up and down arrows to enter or change the value in the Duration field.) The value 2 *days* appears in the Duration field. Project draws a Gantt bar for the task, starting at the project start date you set previously.
26. Now enter durations for all your other tasks. Until the tasks are linked or a specific start or finish date is set, MS Project will set all new tasks that have a duration value to start at the project start date. This is the case for manually or automatically scheduled tasks. (We will change this later when we link the tasks).

Creating milestone tasks

27. So far you have entered project tasks to be completed by the team. You will now enter milestones for the project.

    Note: Milestones are significant events that are either reached within the plan (such as the completion of a phase of work) or imposed upon the plan (such as a deadline by which to get feedback before proceeding). Because milestones don't normally include any work, they are represented as tasks with zero duration.

    To enter a milestone at an appropriate point in the plan, click on the name of the task below where you want the milestone task to be added.

28. On the **Task** tab, in the **Insert** group, click **Milestone**. MS Project inserts a row for a new task and renumbers the subsequent tasks. MS Project names the new task *<New Milestone>* and gives it a zero-day duration. As with the other new tasks, the milestone is initially scheduled at the project start date.
29. With *<New Milestone>* selected, type Check the draft outline plan with the module lab tutor and then press Enter. The milestone task is added to your plan. Note how it appears on the Gantt chart.

Creating summary tasks to organise the project plan into phases/stages

30. You will now add some summary tasks to your plan to organise it into phases or stages of the project. For example, in an IT project these may be the stages of the system development lifecycle. For your coursework assignment, these will be related to your deliverables and the major stages of your project. For this exercise you will create a first

stage called Project initiation. (TIP: It is good practice for each phase or stage to have a review task and or a milestone task at the end.)

31. Select the names of tasks you want to include in the initiation stage, including task 1 (you might want to add some more tasks first).
32. On the **Task** tab, in the **Insert** group, click **Summary**. MS Project inserts a row for a new task, indents the task directly below it, and renumbers the subsequent tasks. MS Project names the new task *<New Summary Task>*
33. With *<New Summary Task>* selected, type Project initiation and press Enter. Note how the summary and sub-tasks are displayed in the Gantt chart.
34. Add more summary tasks to your plan to organise your project into stages.

Creating links between sequential or dependent tasks

So far all your tasks are shown in parallel tasks in the Gantt chart. You will now create sequential and dependent tasks by linking the tasks in your plan to create relationships between predecessor (first) tasks and successor (second) tasks. This builds the schedule and creates a critical path for the project. There are 4 different types of task relationships:

- Finish-to-Start (the finish date of the predecessor determines the start of the successor);
- Start-to-Start (the start date of the predecessor determines the start of the successor);
- Finish-to-Finish (the finish date of the predecessor determines the finish of the successor) and
- Start-to- Finish (the start date of the predecessor determines the finish of the successor).

35. Select the names of two consecutive tasks where the second task is dependent on the first task.
36. On the **Task** tab, in the **Schedule** group, click the link button (∞) to **Link the Selected Tasks**. The selected tasks are now linked with a Finish-to-Start relationship. Note the automatic changes to the dates and the Gantt chart.
37. You can also do this by simply typing the number of the task in the relevant predecessors column. Try this to create different links in your plan.
38. If you have some time left in this lab session, try to add more tasks to make the plan more detailed.
39. Show your plan to one of the module lab tutors for some feedback and guidance to help you develop your plan for the first deliverable in your coursework assignment.
40. Update your plan according to the feedback you have been given.
41. Save and close your plan and make sure everyone in your group has a copy.

The instructions in Lab 3 will develop your MS project skills further by working with *automatically scheduled tasks* to enable you to make the most of the scheduling capabilities of MS project.