

INF09101 Project Management for Information Systems

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Lab 5: Customising and sharing your project plan

Customising your Gantt chart

There are three ways to format Gantt bars:

- Apply predefined colour combinations in the **Gantt Chart Style** group, on the **Format** tab when a Gantt chart is displayed.
 - Apply customized formatting to Gantt bars in the **Bar Styles** dialog box, available by clicking the **Format** tab when a Gantt chart is displayed. Then, in the **Bar Styles** group, click **Format, Bar Styles**. In this case, the formatting changes you make to a particular type of Gantt bar (a summary task, for example) will apply to all such Gantt bars in the Gantt chart.
 - Format individual Gantt bars directly. The direct formatting changes you make have no effect on other bars in the Gantt chart. Double-click a Gantt bar to view its formatting options, or, on the **Format** tab in the **Bar Styles** group, click **Format, Bar**.
1. Open your Coursework plan and you will begin by formatting a manually entered task (if you don't have one, create a manually entered task now for this exercise).
 2. Right-click on a manually entered task and click **Scroll to Task** in the shortcut menu. (This option can also be found in the **Editing** group of the **Task** tab.) MS project scrolls to the task on the Gantt chart and you should note how this task looks now and after you apply a different style to the plan.
 3. On the **Format** tab, in the **Gantt Chart Style** group, click More (the arrow at the bottom of the scroll bar) to display the predefined colour styles.

The formatting options under Scheduling Styles distinguish between manual and automatically scheduled tasks, but the Presentation Styles do not. The Gantt Chart styles are divided into two groups: Scheduling Styles (distinguish between manually and automatically scheduled tasks) and Presentation Styles (do not make that distinction between tasks).

4. Under **Presentation Styles**, click the orange colour scheme. Project applies this style to the Gantt bars in the plan. The Gantt bar of the manually scheduled task, is now no longer visually distinct from the automatically scheduled tasks. Applying a presentation style to the Gantt Chart view is a useful option when you don't want to distinguish between manual and automatically scheduled tasks to an audience for whom you do not want to make this distinction.

5. The next part of this exercise is to reformat a task name so that it will visually stand out. In the **Task Name** column, right-click on a milestone task in your plan. You will see the short-cut menu and a mini-toolbar.
6. On the Mini Toolbar, click the arrow next to the **Background Colour** button (a tipped-up paint pot symbol), and under **Standard Colours**, click yellow. (You can also click the **Task** tab, and in the **Font** group, click **Background Colour**.) MS Project applies the yellow background colour to the task name's cell.
7. On the Mini Toolbar, click the **Italic** button. The milestone task name now stands out.

[TIP - To remove text formatting (if required): On the **Task** tab, in the **Editing** group, click **Clear** (an eraser symbol), and then click **Clear Formatting**.]

8. Now you will format the milestone indicator in the chart. With the name of the milestone task still selected, on the **Format** tab, in the **Bar Styles** group, click **Format**, and then click **Bar**.
9. In the **Format Bar** dialog box, under **Start**, click the **Shape** drop-down list. MS Project displays the symbols you can use as a Gantt bar starting edge or, in this case for a milestone, as a milestone symbol.
10. Click the star symbol, and then click **OK**. MS Project uses the star symbol as the milestone symbol for this task. This milestone symbol has been formatted with a custom shape.

Note: In this exercise, you used the Bar command to format a single item on the Gantt Chart view. You can also customize entire categories of Gantt bars, such as all milestones, via the Bar Styles command.

11. MS Project automatically draws horizontal lines in the chart portion of a Gantt chart view for just the selected task. These lines help to visually track from the task's name and other information on the left side of the view to its Gantt bar or symbol on the right. To conclude this part of exercise, you will add horizontal gridlines for all tasks in the Gantt Chart view. On the **Format** tab, in the **Format** group, click **Gridlines**, and then click **Gridlines**.
12. Under **Line to change**, leave **Gantt Rows** selected, and in the **Type** box under **Normal**, select the small dashed line (the third option down), and then click **OK**. MS Project draws dashed lines across the chart portion of the Gantt chart view. With these dashed lines displayed, the solid horizontal lines Project draws for the selected task are still clearly visible.
13. You can also draw on your Gantt chart and create links from the drawn object. Try this in your plan by following this and the following instruction. To draw on a Gantt chart: On the **Format** tab, in the **Drawings** group, click **Drawing**. Select the drawing shape you want, and then draw it anywhere you like in the chart portion of a Gantt chart view.
14. To set the type of link you want applied to the drawn object: click on the drawn object.
15. On the **Format** tab, in the **Drawings** Group, click **Drawing** and then click **Properties**.
16. From the **Line & Fill** tab, select the options you want and click **OK**.
17. Save the plan

Customising a Timeline view

A Timeline view is best suited to display key tasks from your plan in a simple and compact format. This view is especially well suited for conveying quick summaries of plans and it is a handy way of sharing project information. In lab exercise, you will populate a Timeline view with

specific tasks and adjust some display details.

18. Click anywhere in the Timeline view. MS Project shifts focus to the Timeline view and displays the Timeline Tools contextual label above the Format tab.
19. On the **Format** tab, in the **Insert** group, click **Existing Tasks**. The **Add Tasks To Timeline** dialog box appears.
20. The **Add Tasks To Timeline** dialog box contains an outline of the summary and subtasks in the plan. Select the boxes for the task names which correspond to summary tasks and milestones and then click **OK**. These tasks have now been added to your timeline.
21. Save the plan.

Customising reports

You can use MS Project reports to see details of your plans in a single report which you can create to include a dynamic mix of tables, charts, and textual content. MS Project also includes several built-in reports which you can customise or create your own for the unique information needs of your project stakeholders. Reports are useful for sharing with others via printing or copying. In this exercise, you will change the formatting of a built-in report to create a work overview.

22. On the **Report** tab, in the **View Reports** group, click **Dashboards** and then click **Work Overview**. The Work Overview report appears. This report includes several charts that describe work over time and per resource. Depending on your screen resolution, you might need to vertically scroll the report to see all of the charts. On the left side of the report is the Work Stats column chart. You will change the formatting of this chart.
23. Click anywhere in the **Work Stats** column chart.
24. Under **Chart Tools**, click the **Design** tab. In the **Chart Styles** group, click the chart style with the black background. MS Project applies the chart style to the Work Stats chart.
25. Explore the design and formatting options available for this chart, and then select one of the other charts in this report. This report includes three chart types: column, bar, and line. Each has unique chart styles.
26. On the **View** tab, in the **Task Views** group, click **Gantt chart**. The Gantt Chart view replaces the Work Overview report.
27. Save the plan

Copying and sharing plan views and reports

Copied views and reports can then be pasted into e-mail messages, presentations, and other documents. Gantt charts and Timeline views are well suited for sharing schedule details. The Timeline is a concise “project at a glance” view, and the Gantt chart is a widely used format of schedules. Reports are also well suited for sharing with other project stakeholders. Shared reports can be effective for conveying Project information you might otherwise need to copy to a spreadsheet application like Microsoft Excel for further formatting, such as tabular data and charts. In this exercise, you will copy the Gantt chart, Timeline view, and a report to another application.

28. In the Gantt Chart view, select the names of a summary task and its subtasks.

29. On the **Task** tab, in the **Clipboard** group, click the arrow next to **Copy**, and then click **Copy Picture**. The Copy Picture dialog box appears. In this dialog box, you can control how Project copies details from the plan to the Clipboard or saves it to a file. The first two options under Render Image control the size and resolution of the Gantt chart image you copy; the third allows you to save the copied image as a Graphics Interchange Format (GIF) image file. The Copy and Timescale options let you fine-tune what you want to copy.
30. For this exercise, you will copy the selected rows for screen-resolution quality and leave the timescale as shown on the screen.
31. Click **OK**. MS Project copies a graphic image of the Gantt chart for just the selected rows to the Windows Clipboard.
32. Open MS Word and create and save a new document.
33. Inside your new document, click **Paste** and then **Save** (keep this file open for now).
34. Go back to MS Project.
35. Click anywhere in the Timeline view. With the focus now on the Timeline, the contextual label of the Format tab changes to Timeline Tools.
36. On the **Format** tab, in the **Copy** group, click **Copy Timeline**. The Copy Timeline options appear.
37. Click **Full Size**. MS Project copies a graphic image of the timeline to the Clipboard.
38. Go back to MS Word, press the Enter key to add some space below the Gantt chart image and then click **Paste**, then **Paste Special..** and then **Bitmap**.
39. Save the MS Word document but don't close it yet.
40. Go back to MS Project. So far you've worked with the Timeline in its detailed format. To give you more room on the screen, switch the Timeline to its less detailed format: click anywhere in the Timeline view, and then on the **Format** tab, in the **Show/Hide** group, click **Detailed Timeline**. MS Project toggles the Timeline to its less detailed format. Now you will copy and paste a report.
41. On the **Report** tab, in the **View Reports** group, click **Dashboards** and then click **Work Overview** to see the same Work Overview report you customised earlier.
42. Click anywhere in the **Work Overview** report and then, under **Report Tools**, click the **Design** tab.
43. In the **Report** group, click **Copy Report**. MS Project copies a graphic image of the report to the Clipboard. [If you wanted to copy just one chart from the report, right-click on the outer edge of the chart you want and, in the shortcut menu that appears, click Copy.]
44. Go back to MS Word, press the Enter key to add some space below the Timeline image and then click **Paste**, then **Paste Special..** and then **Bitmap**. MS Word pastes the graphic image of the report into the new document.
45. You now have copies of the Gantt chart and Timeline views, as well as the Work Overview report in your MS Word document. Save and close the document and return to MS Project.
46. On the **View** tab, in the **Task Views** group, click **Gantt Chart**. The Gantt chart view replaces the Work Overview report.
47. Save and close the plan.

Learning points:

- Predefined Gantt Chart styles can be applied to quickly format a Gantt chart view.
- Individual Gantt bars or whole categories of Gantt bars may be formatted from the Format tab, in the Bar Styles group, click either Bar or Bar Styles.
- Selected tasks can be added to the Timeline view when you need to show a simplified graphical representation of a plan.
- The Copy Picture feature (accessed by clicking the Task tab in the Clipboard group) can be used to create a graphic image snapshot of the active view and copy it to the Clipboard. For

the Timeline view, you can use the Copy Timeline feature (accessed by clicking the Format tab in the Copy group).

- Reports are combinations of tabular data and charts that focus on key aspects of a plan. You can customize elements in a report.