Software Methods and Tools

Spring 2017
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Lab #1: Microsoft Project 2013

Description:

In this lab, we are going to learn Microsoft Project 2013 - a project management tool usually used to make project schedule. Specifically, we are going to learn how to create tasks (recurring tasks), summaries, WBS code, resources, and how to manage relationships between tasks. At the end of the lab, you will be creating a sample project schedule as the exit exercise.

Note that the screenshots included in this tutorial were made from Project 2010. They look a little different from what you can see in Project 2013, but the basic operations are same.

Instructions:

1. Creating a task, a summary, a milestone, and a project summary task

You can click the "Task" button in the ribbon to insert a new task, as show in the figure below. Similarly, you can create a summary and a milestone.
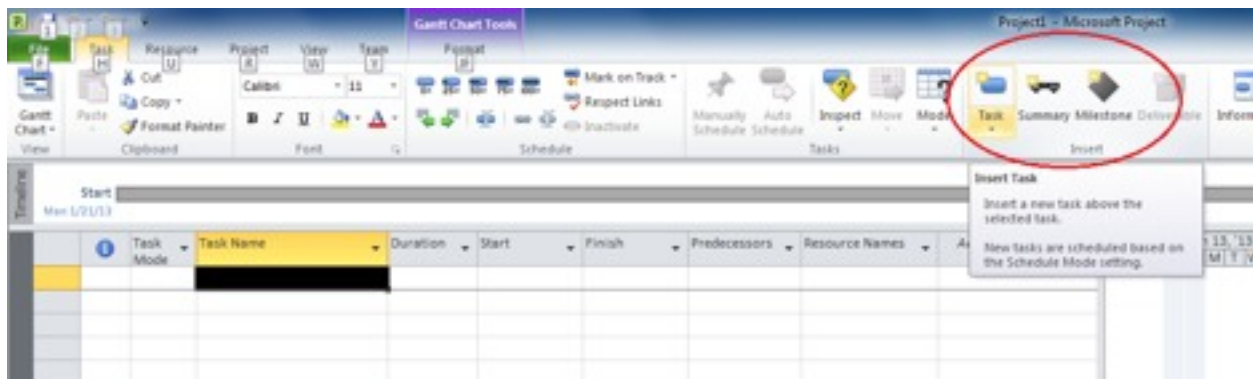
Alternatively, you can just type in your task name in the "Task Name" field to create a new task.

To create a project summary task to represent the whole project, click the "Format" tab and click the check box labelled "Project Summary Task". See the figure below. Note that the duration, start date, and finish date of this special task will be automatically populated from the specific tasks it includes, and cannot be manually modified.
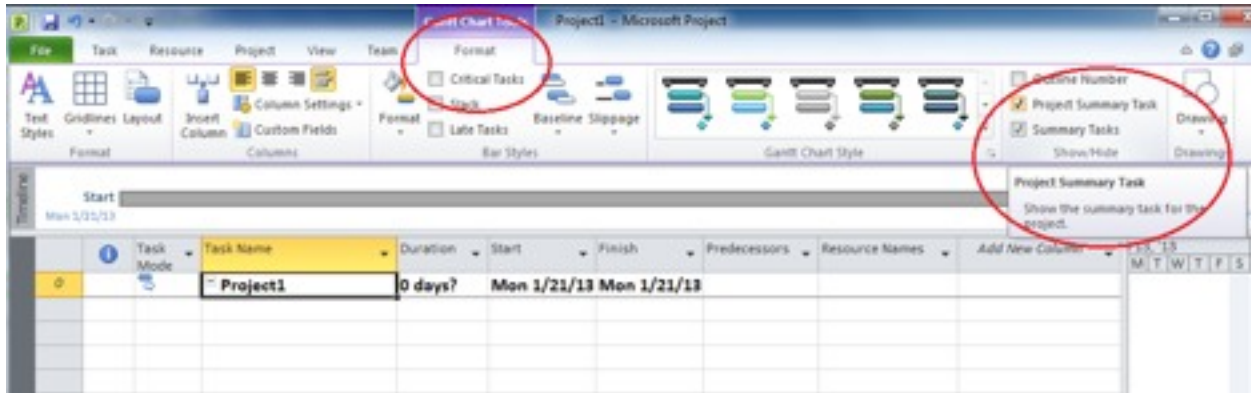
2. Creating recurring tasks

A recurring task is a special task that happens regularly (e.g. every Monday) in a project, such as a group meeting, a monthly report, etc.

To create a recurring task, simply click the triangle below the Task icon and select "Recurring Task ..." in the pop-up menu, as illustrated in the following figure.
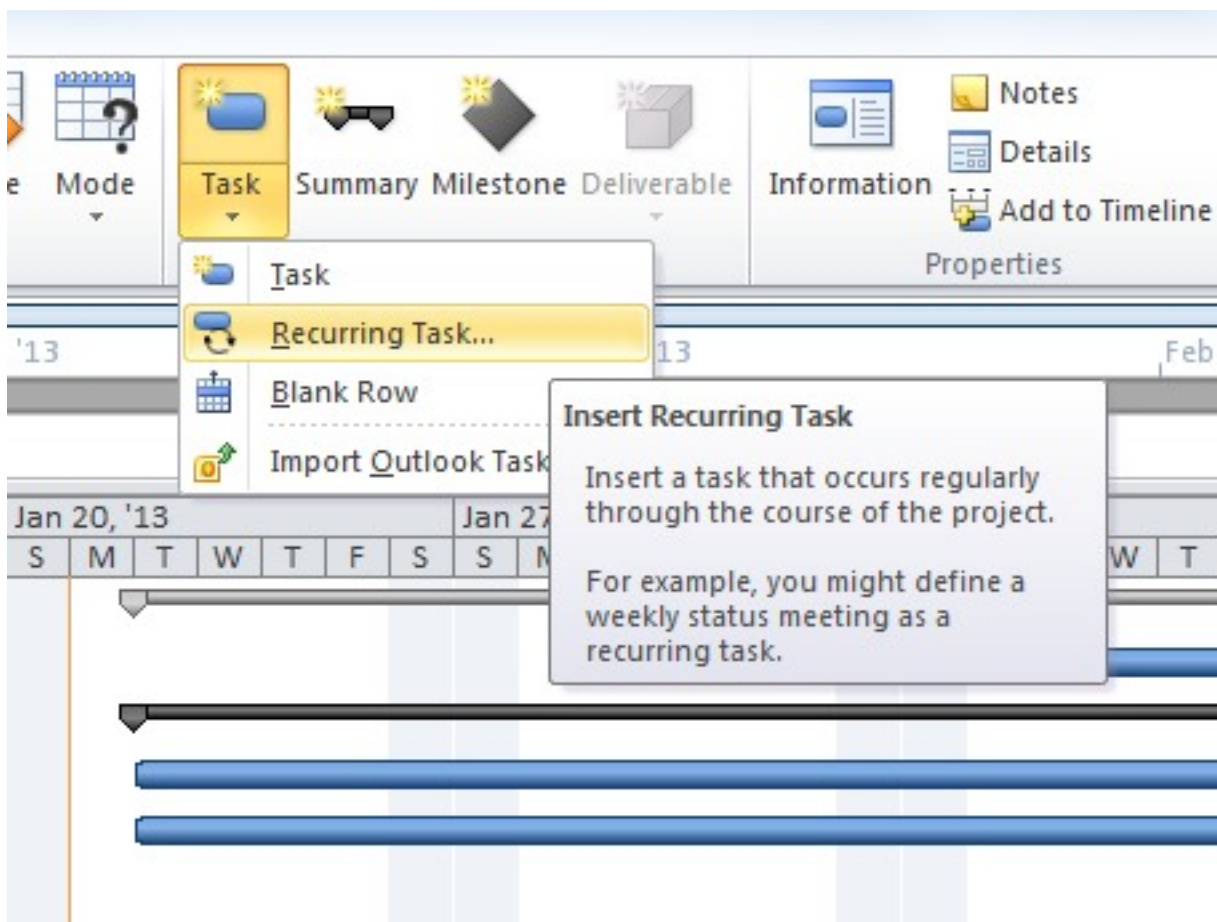
## 3. Work Breakdown Structure (WBS) Code

WBS decomposes a project into a tree structure, where each node may represent a task or a milestone of the project.

Right click the title bar of "Task Name", and select "Insert Column". Select "WBS" in the drop-down list. A column like the following figure will show up.
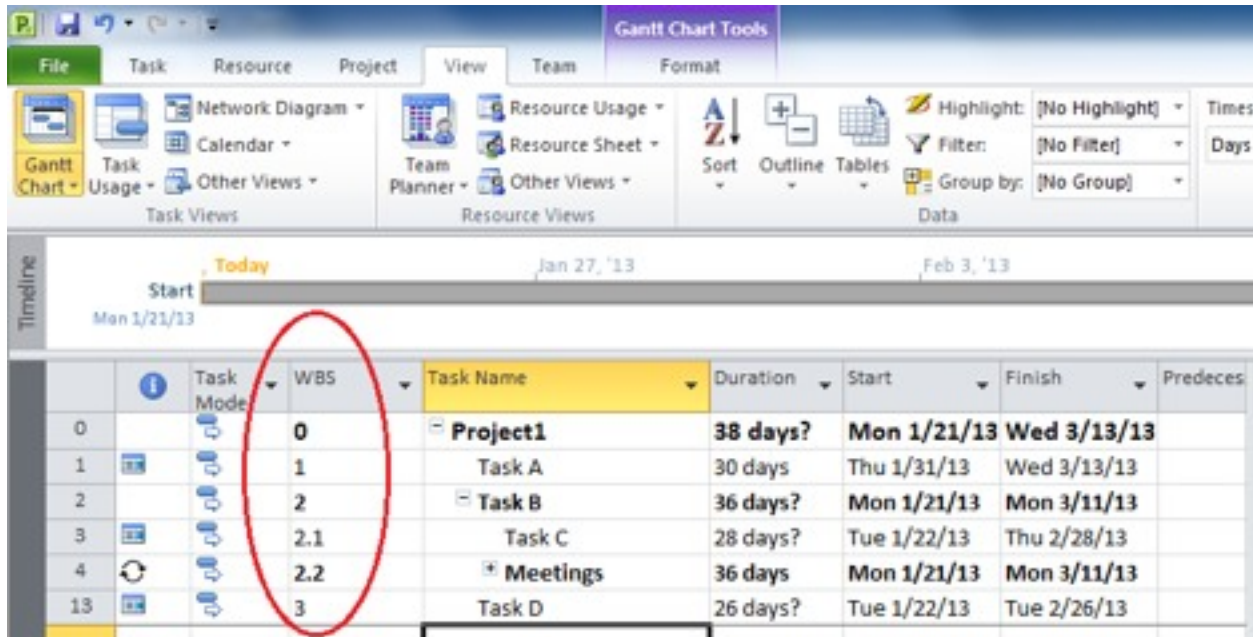
Note that the WBS code of the project summary task we created earlier is 0.

Now try changing a specific task to or from a summary and see what happens to its WBS code. This can be done by clicking the indent icon in the ribbon, as shown below.
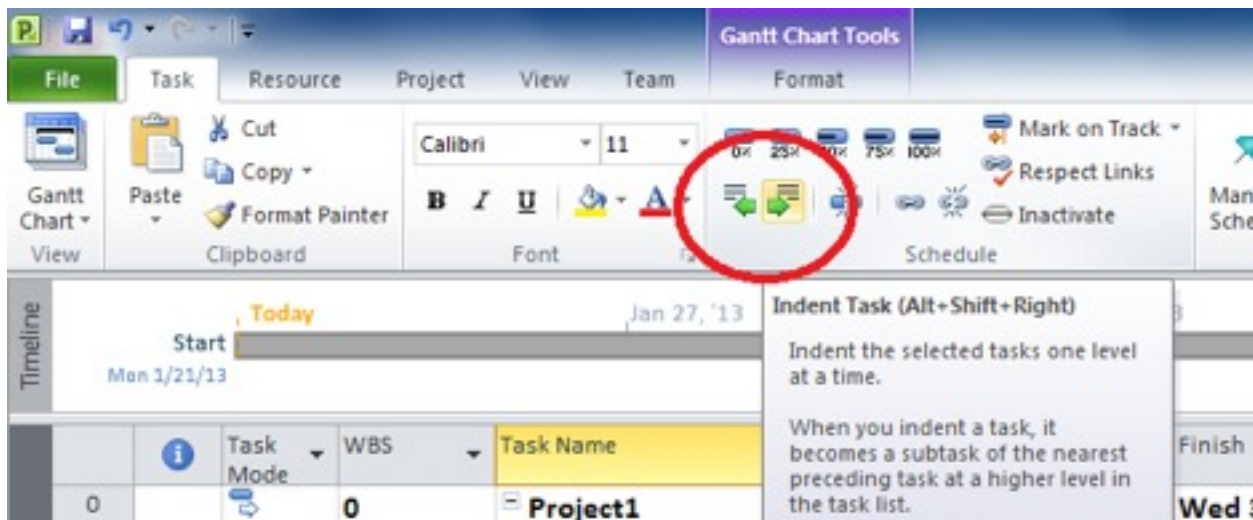
4. Resources

You can add available resources (e.g. human resources) to the project you just created.

Go to the view of "Resources Sheet". Enter the names of the people that are going to work on this project in the pop-up dialog box.
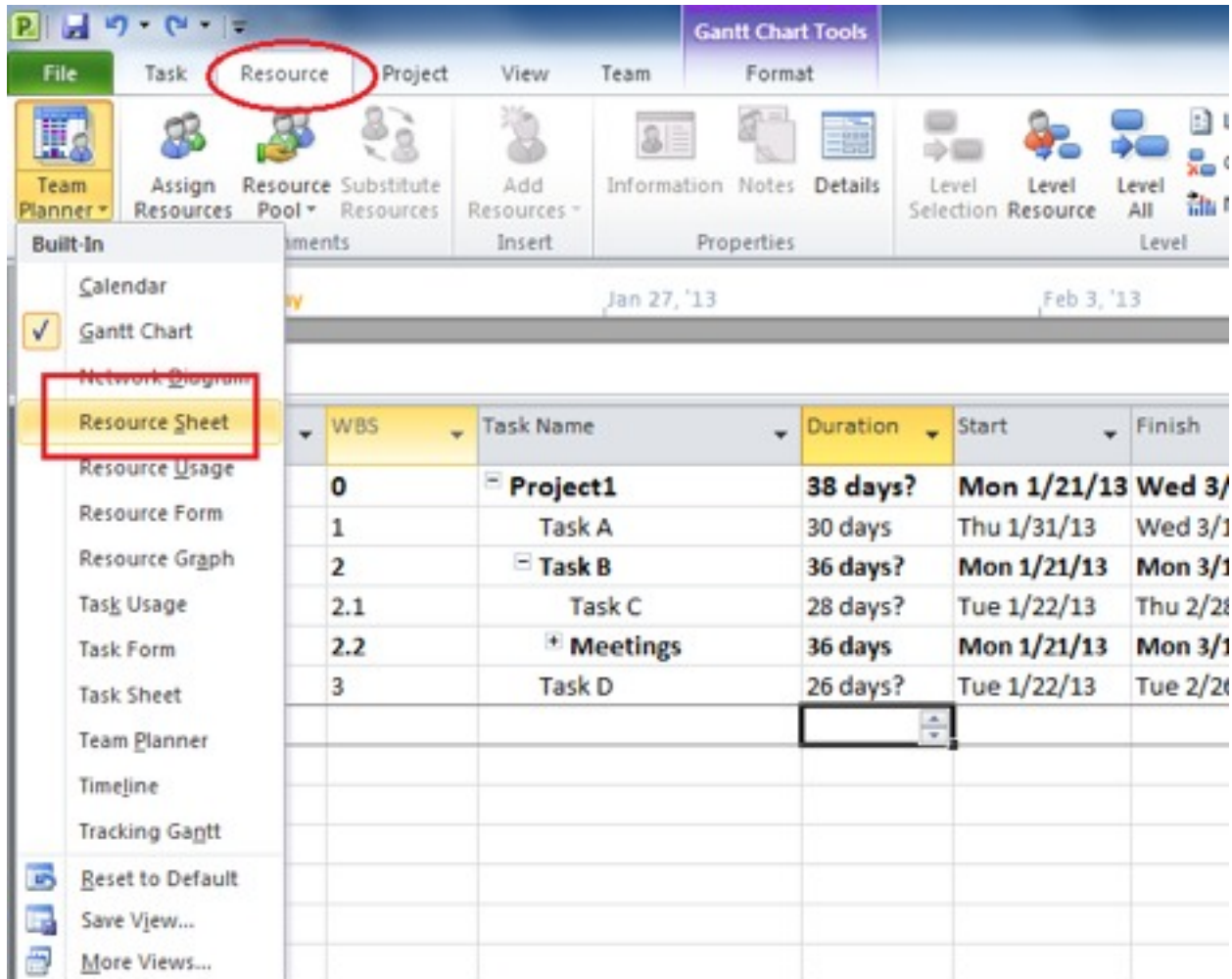
Go back to the Gantt Chart view of the project, and assign the resources you just created to the corresponding tasks, as shown in the figure below.

5. Task dependencies

In MS Project, we can also manage the relationships between different tasks.

As shown in the figure below, this can be done by specifying the task number of the related task. By default, the relationship is "Finish-to-Start(FS).


To specify a different relationship, you can type in FF(Finish-to-Finish), SS(Start-to-Start), or SF(Start-to-Finish) following the task number. Try these different relationships, and see how the arrow in the gantt chart will change.

Alternatively, you can double-click the corresponding task in the Spreadsheet and make the selections in the pop-up dialog box.

6. Export as a GIF image

Before exporting the project schedule as an image, go to the view tab, click the "Zoom" drop-down list, and select "Entire Project" to have all the elements shown in the screen.
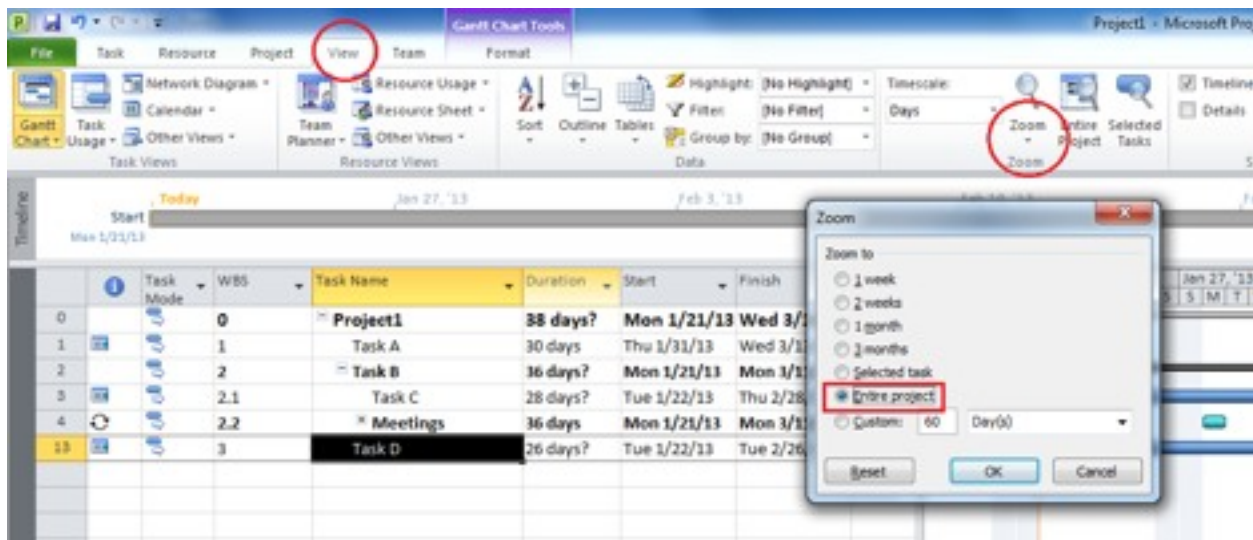
After that, go to the Task tab and expand the "Copy" drop-down list. Select "Copy Image" as shown in the figure below.
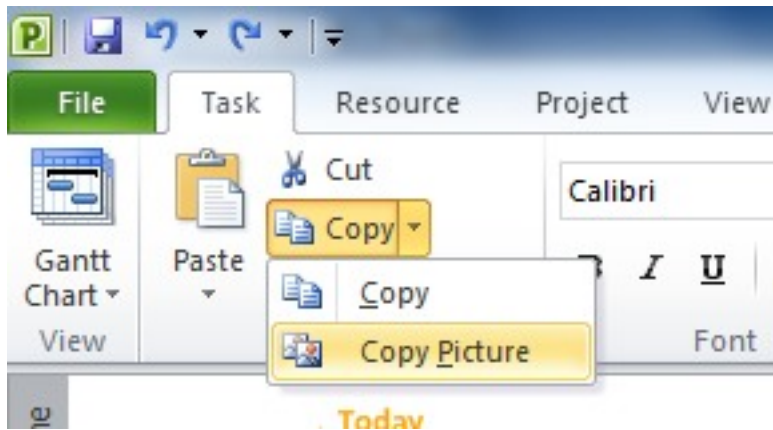
In the pop-up dialog box, you can specify the output format and the content you want to include in the final picture.

Exit Exercise

Download the file named "Sample.gif" from the course website. Create a project schedule that is similar to the figure included in the downloaded file. The specific Start/Finish time and durations do not have to be the same, but the basic elements, structure, and dependencies must follow the schedule shown in the figure.

Once you are done, export your schedule as a GIF image and show it to the TA.