Microsoft Project 2016

Lesson 8

Project Schedule Formatting—Fundamentals

Objectives

SKILLS	MATRIX SKILL
Formatting the Gantt Chart • Modifying the Gantt Chart Using the Bar Styles Dialog Box • Modifying the Gantt Chart Using Gantt Chart Styles	Modify the Gantt chart using the Bar Styles dialog box Modify the Gantt chart using Gantt Chart Styles
Modifying Text Appearance in a View • Modifying the Appearance of a Single Piece of Text	Modify the appearance of text in a view Modify the appearance of a single piece of text
Creating Custom Fields	Create a custom text field
Creating and Editing Tables	Create a custom table
Creating Custom Views	Create a custom view

Microsoft Official Academic Course, Microsoft Project 2016

Software Orientation

- In Microsoft Project, you can use the Bar Styles dialog box (see the figure on the next slide) to customize the appearance of items on the Gantt chart.

- This dialog box enables you to change the appearance of items such as task bars, milestones, summary bars, and text that appear on the Gantt chart.

- You can change characteristics such as bar types, patterns, colors, splits, and shapes.

Software Orientation

Software Orientation

- You will now use one of the features of the ribbon interface in Project 2016, the Format ribbon. With the ribbon, you have faster access to formatting options in views.

- You might have seen in the various views of previous lessons a tab at the very top of the screen, above the ribbon. This is the Format tab and it provides formatting options available in the view you are in at the time. The figure below shows the Format ribbon for the Gantt Chart view.

Formatting the Gantt Chart

- The Gantt Chart view consists of two parts: a table on the left and the bar chart on the right.

- The default formatting of the Gantt Chart view is useful for on-screen project schedule viewing and printing. However, you are able to change the formatting of almost any element on the Gantt chart to suit your needs.

- In the next exercise, you learn to format Gantt chart task bars.

- You can format whole categories of Gantt chart task bars via the Bar Styles dialog box, or you can format individual Gantt chart task bars directly.
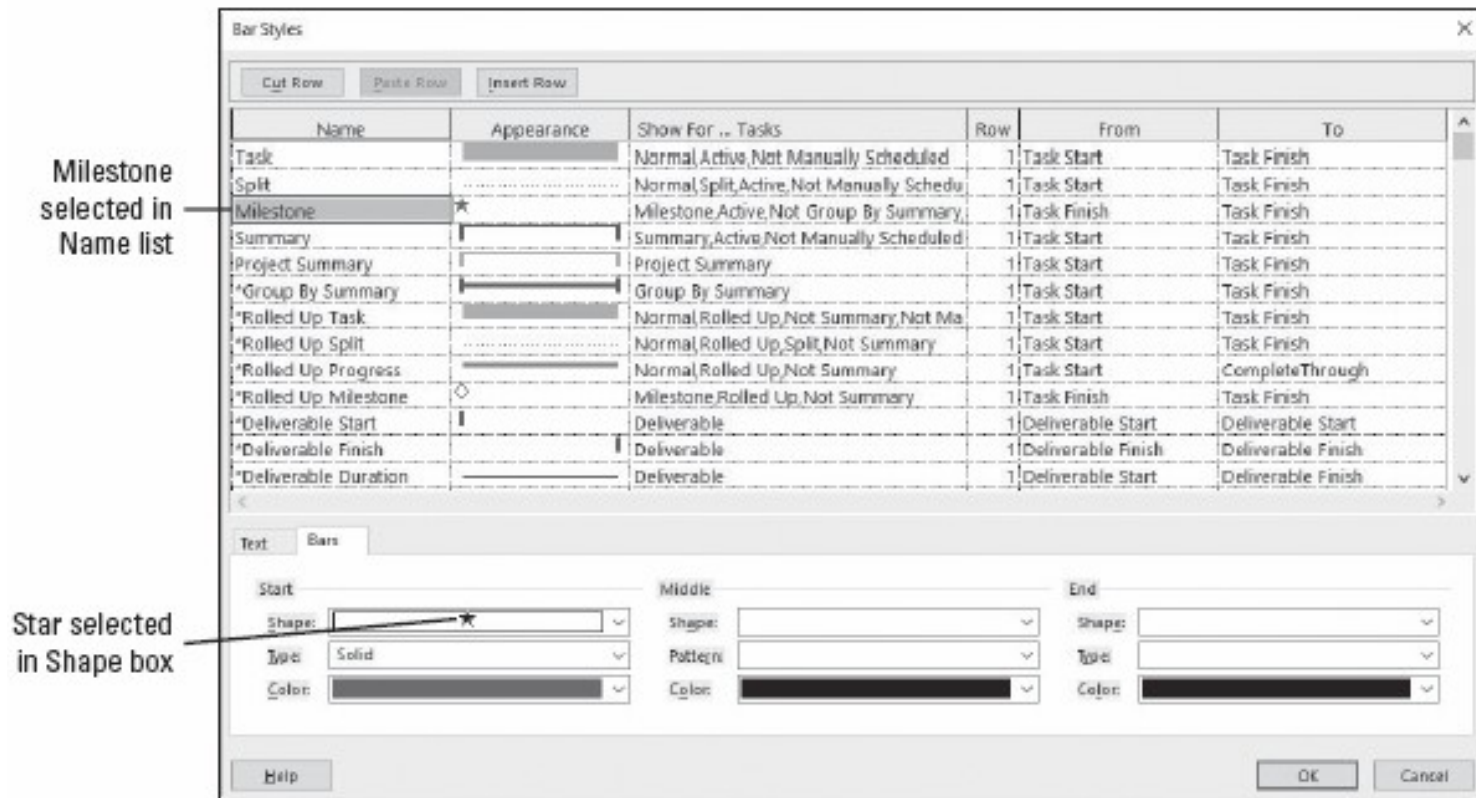
Modifying the Gantt Chart Using the Bar Styles Dialog Box

- In Microsoft Project, the Gantt Chart view is the default view. A view is a window through which you can see various elements of your project schedule. In the following exercise, you will use the Bar Styles dialog box to make formatting changes to several items in the Gantt Chart view.

- The Gantt chart is the primary way of viewing the data in a project schedule. It became the standard for visualizing project schedules in the early twentieth century when American engineer and management consultant Henry L. Gantt developed a bar chart with two main principles:

  1. To measure activities by the amount of time needed to complete them.

  2. To use the space on the chart to represent the amount of the activity that should have been done in that time.

Step-by-Step: Modify the Gantt Chart Using the Bar Styles Dialog Box

- GET READY. Before you begin these steps, open *Tailspin Remote Drone 8M* from the data files for this lesson. SAVE the file as *Tailspin Remote Drone 8* in the solutions folder.

1. Click the Format tab; then, in the Bar Styles group, click the Format button. Select Bar Styles from the drop-down list. The Bar Styles dialog box appears.

2. In the Name column, select Milestone. You want to change the shape of the milestones on the Gantt chart.

3. In the bottom half of the dialog box under the Start label, locate the Shape box. Select the star shape from the drop-down list in the Shape box. Note that the star shape now appears in the Appearance column for Milestone. Your screen should look similar to the figure on the next slide.
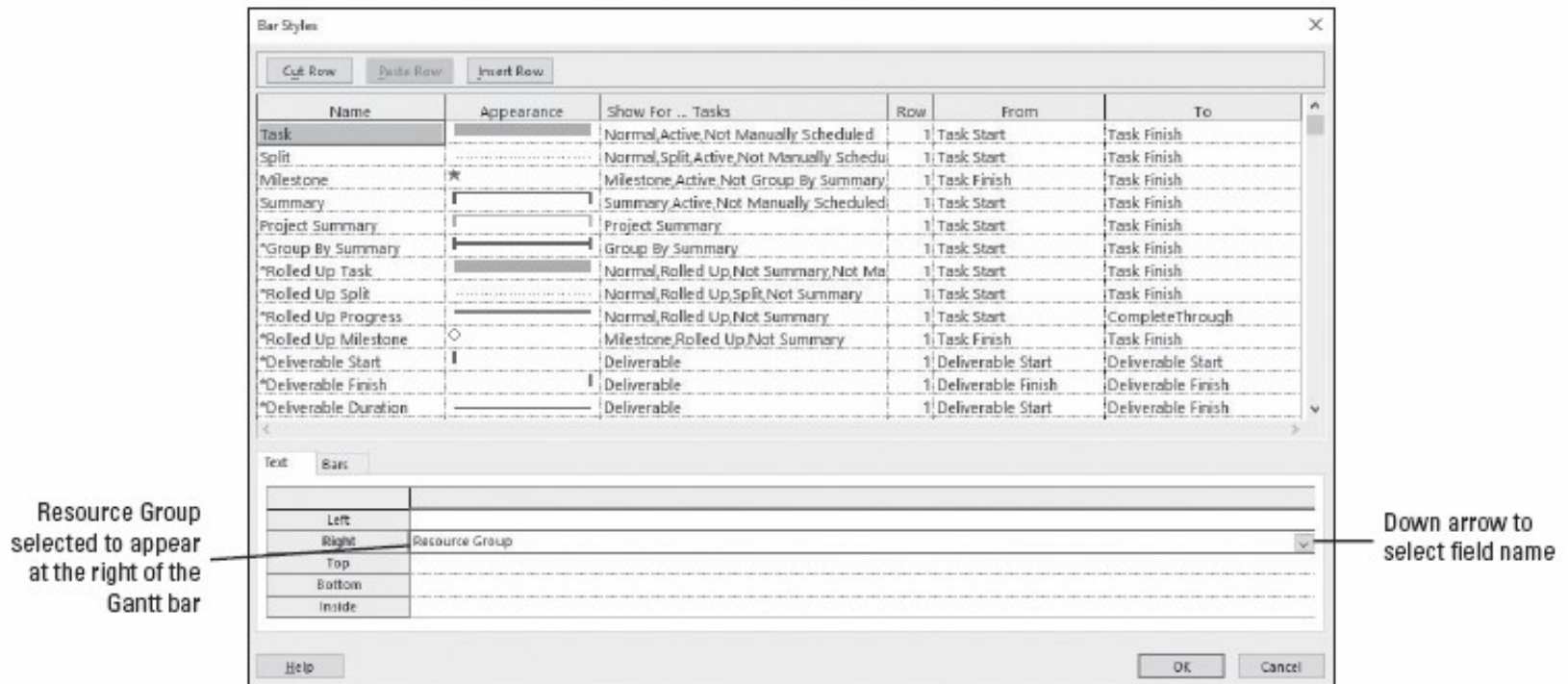
Step-by-Step: Modify the Gantt Chart Using the Bar Styles Dialog Box

Step-by-Step: Modify the Gantt Chart Using the Bar Styles Dialog Box

4. In the Name column at the top of the dialog box, select Task.

5. In the bottom half of the dialog box, click the Text tab. You want to make a change to display the resource groups assigned rather than full names next to the task bars.

6. On the Text tab, in the Right box, select Resource Names, click the down arrow (located at the far right), and then select Resource Group.

   Your screen should look similar to the figure on the next slide.

Step-by-Step: Modify the Gantt Chart Using the Bar Styles Dialog Box

Step-by-Step: Modify the Gantt Chart Using the Bar Styles Dialog Box

7. Click OK to close the Bar Styles dialog box. Microsoft Project applies the formatting changes you made to the Gantt chart. Your screen should look similar to the figure on the next slide.

8. SAVE the project schedule.

• PAUSE. LEAVE the project schedule open to use in the next exercise.

Step-by-Step: Modify the Gantt Chart Using the Bar Styles Dialog Box

Reformatted milestones and resource groups displayed after task bars
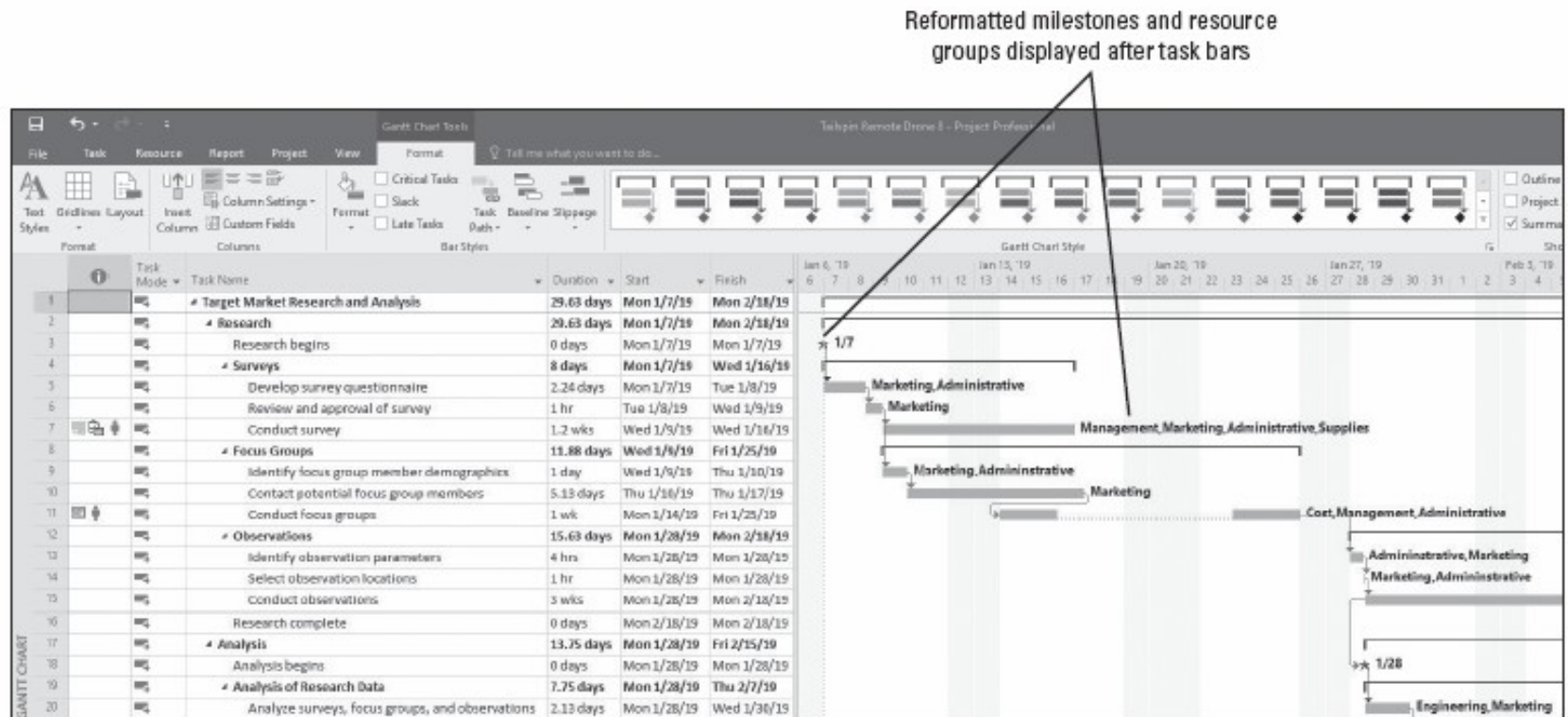
Modifying the Gantt Chart Using the Bar Styles Dialog Box

- The two main view categories are named single view, which you have been using mostly throughout the lessons, and one you will see later in this lesson called a combination view.

- Views are made up of one or more view elements. The five different view formats and their common uses are listed in the table.

FORMAT	PURPOSE OR USE
Charts	Present information graphically, such as the Gantt chart
Sheets	Present information in rows and columns, such as the Task Sheet or the Resource Sheet
Forms	Present detailed information in a structured format about one task or resource at a time, such as the Task Form
Diagrams	Present information in diagram format, such as the Network Diagram
Usage	Present task or resource information on the left side and time-phased information on the right, such as the Resource Usage or Task Usage views

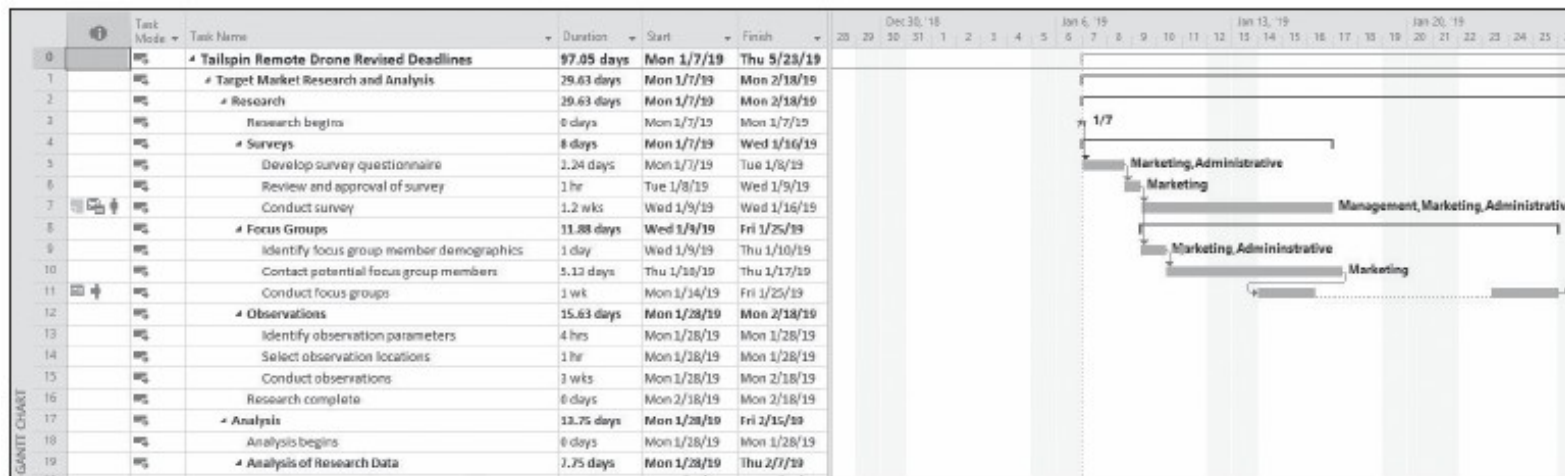# Modifying the Gantt Chart Using Gantt Chart Styles

- In the following exercise, you will create a custom Gantt chart, format it using predefined Gantt Chart Styles, and then save the custom view.

- In this exercise, you will make formatting changes to your project schedule using predefined Gantt Chart Styles. This is similar to making changes using the Bar Styles command; however, the predefined Gantt Chart Styles have fewer choices than the Bar Styles command.

- As you are reviewing the formatting changes in the My Custom Gantt Chart view, remember that none of the data in the project schedule has changed—just the way it is formatted. These formatting changes affect only the My Custom Gantt Chart view; all other views in Microsoft Project are unaffected.

Step-by-Step: Modify the Gantt Chart Using Gantt Chart Styles

- GET READY. USE the project schedule you created in the previous exercise.

1. Click the Format tab, under Gantt Chart Tools, if necessary.

2. In the Show/Hide group, ensure that the Project Summary Task check box is checked.

3. Press F5. In the ID box, key 0 and click OK. Microsoft Project displays the project summary task (task ID 0) at the top of the Gantt Chart view. You will make a few adjustments to your screen so that all of the summary task information is visible.

4. Double-click the right edge of the Task Name column, in the column heading, to expand the column so that you can see the entire value.

5. Drag the vertical divider bar between the table and chart to the right until at least the Duration, Start, and Finish columns are visible. Adjust the vertical divider bar, as necessary. Your screen should look similar to the figure below.

Before you make further formatting changes, you will make a copy of the Gantt Chart view so that you will not affect the original.
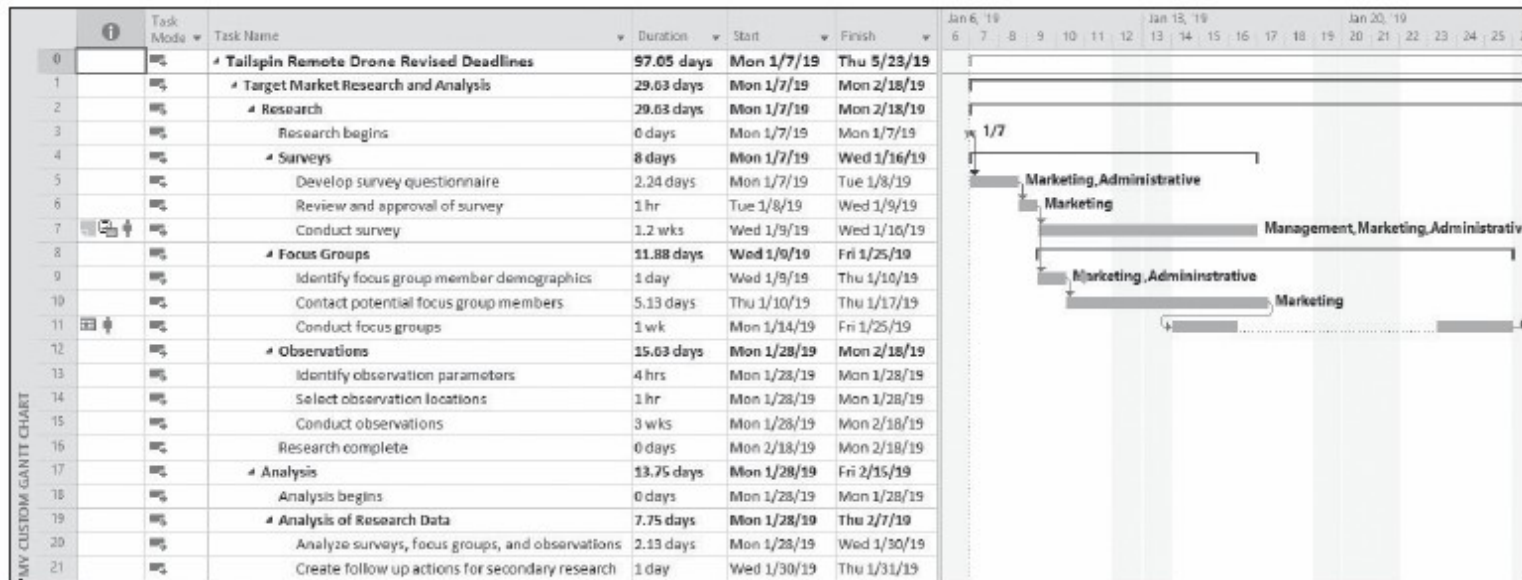
Step-by-Step: Modify the Gantt Chart Using Gantt Chart Styles

6. Click the View tab. In the Task Views group, click the down arrow under the Gantt Chart button and then select Save View. The Save View dialog box appears with View 1 as the default name, as shown in the figure below.
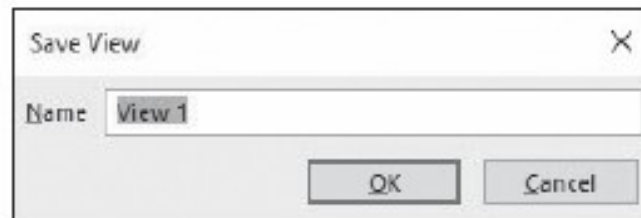
7. In the Name field, key My Custom Gantt Chart and then click OK. The Save View dialog box closes. Note that the name of the new view is listed on the left edge of your screen. Your screen should look similar to the figure on the next slide.

Step-by-Step: Modify the Gantt Chart Using Gantt Chart Styles

Name of view appears here

8. Click the Format tab. In the Gantt Chart Styles group, click the More button located at the lower right of the bar graphics; see the top figure on the next slide.

# Step-by-Step: Modify the Gantt Chart Using Gantt Chart Styles

The More button
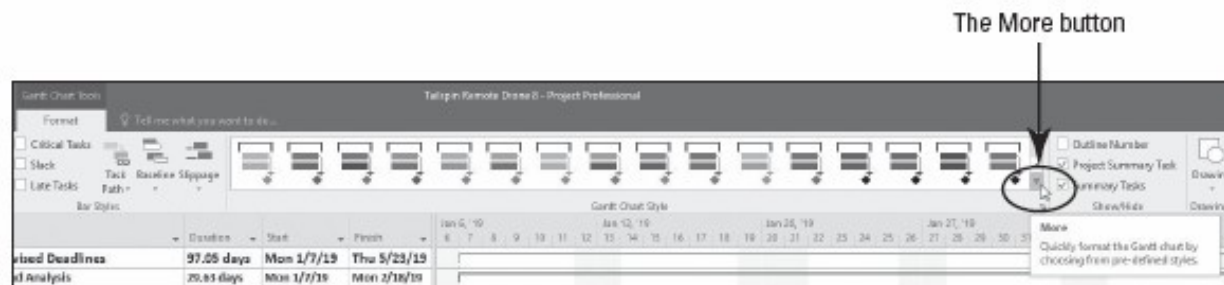
9. The predefined Gantt Chart Style options appear as shown in the figure below. These are divided into two style categories, one for scheduling and one for presentations. Select the fourth style from the left in the scheduling category.
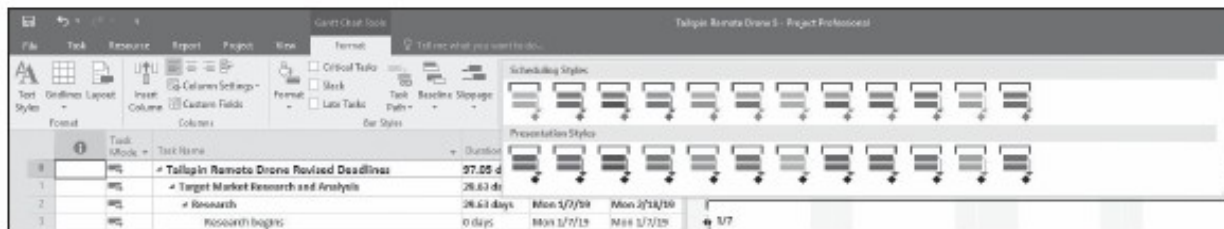
Step-by-Step: Modify the Gantt Chart Using Gantt Chart Styles

10. On the Format ribbon, in the Bar Styles group, click the Critical Tasks check box. Your screen should look like the figure below.
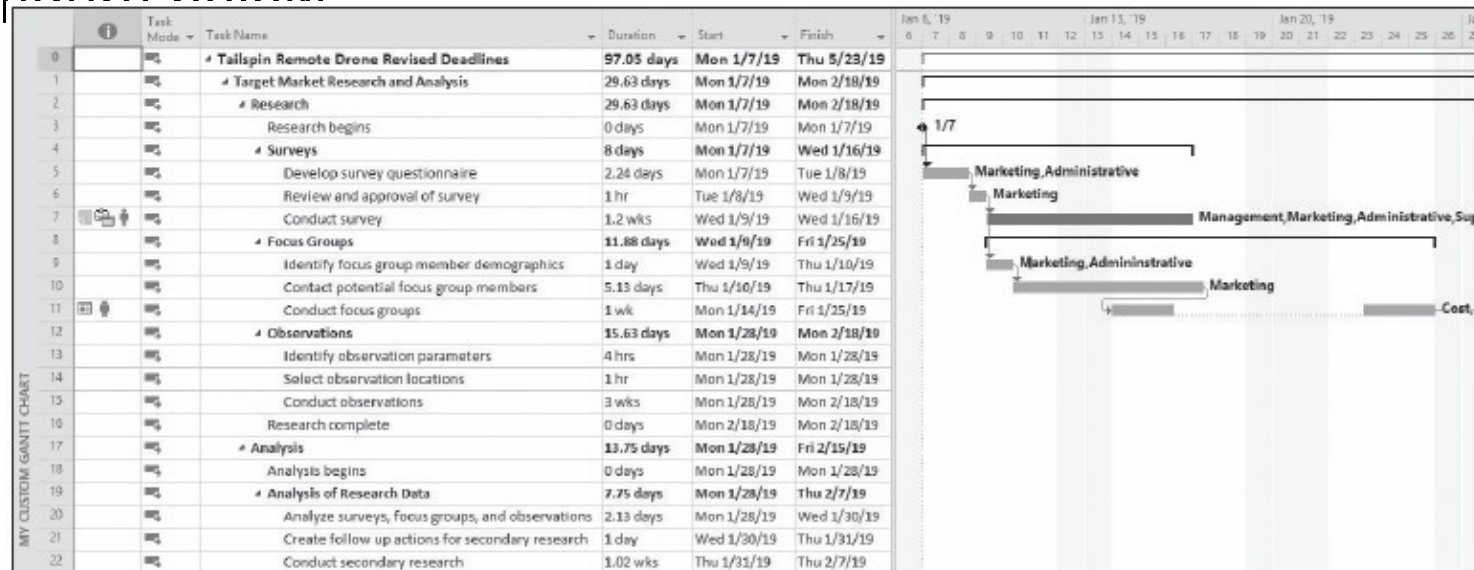
11. SAVE the project schedule.

- PAUSE. LEAVE the project schedule open to use in the next exercise.

Modifying Text Appearance in a View

- Microsoft Project enables you to change the way text appears within a view.

- You can modify the appearance of an entire category of tasks, such as summary tasks or milestones, or you can change the appearance of an individual cell.

- This feature allows you to call attention to specific items or to offset a specific type of task with color and font size or type.

- In this exercise, you will modify the way all text appears for summary tasks. In the next exercise, you will modify a single piece of text.

Step-by-Step: Modify the Appearance of Text in a View

- GET READY. USE the project schedule from the previous exercise.

1. Click the Task tab, click the down arrow under the Gantt Chart button, and select More Views. The More Views dialog box appears.

2. In the More Views dialog box, select Task Sheet and then click Apply. The Detail Gantt view appears.

3. Press the F5 key. In the ID box, key 0 and then press Enter. This brings you to the top of the Gantt chart.

4. Click the Format tab under Text Sheet Tools. Then, in the Format group, click Text Styles. The Text Styles dialog box appears.

5. In the Items to Change: box, click the submenu arrow and select Summary Tasks from the list.

6. In the Font: box, leave the default font type as it is. In the Font Style: box, select Bold Italic.

Step-by-Step: Modify the Appearance of Text in a View

7. In the Size: box, select 12.

8. In the Color: box, select White.

9. In the Background Color: box, select dark blue (ScreenTip will show as Blue, Darker 50%). Your Text Styles dialog box will look similar to the figure at right.
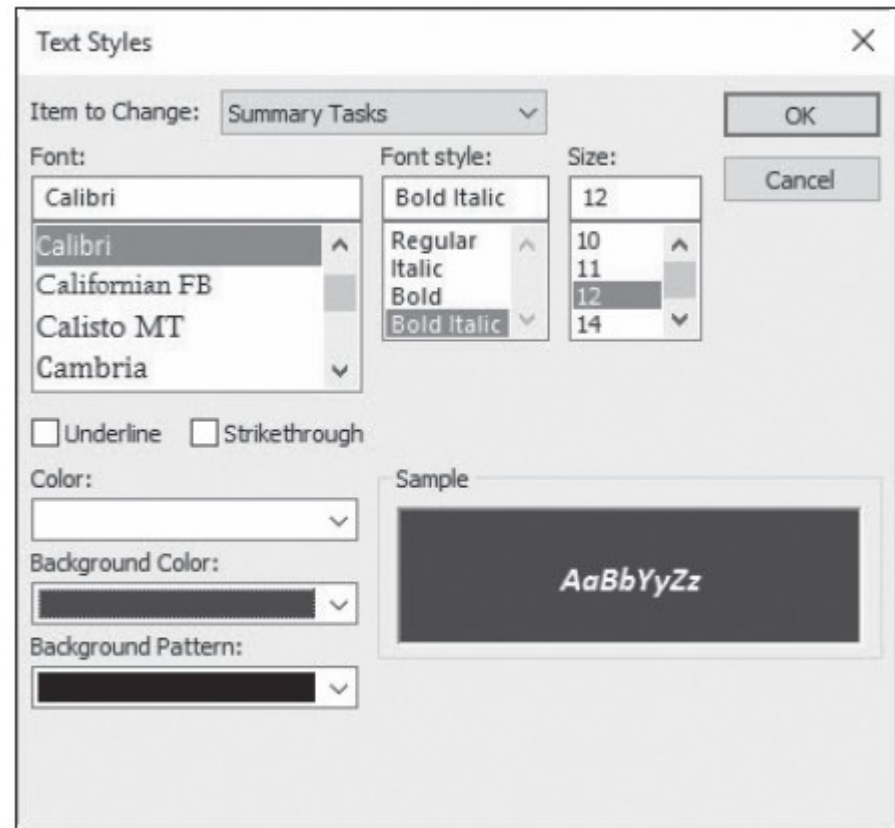
Step-by-Step: Modify the Appearance of Text in a View

10. Click OK. Microsoft Project changes the formatting of all summary tasks to the attributes you specified. Your screen should look similar to the figure on the next slide.

11. SAVE the project schedule.

- PAUSE. LEAVE the project schedule open to use in the next exercise.

Step-by-Step: Modify the Appearance of Text in a View

Modifying the Appearance of a Single Piece of Text

- In the following exercise, you will modify a single piece of text in the Task Sheet view using the cost table.

- Modified text remains modified every time it is called up in that view, regardless of the table you are using.

- For example, if you were to switch to the summary table after you formatted this text, it appears with the new formatting.

Step-by-Step: Modify the Appearance of a Single Piece of Text

- GET READY. USE the project schedule from the previous exercise.

1. On the ribbon, click the View tab. In the Data group, click the Tables button and then select Cost.

2. Auto-fit all the columns to see all the data and then select the Total Cost cell for task 38, Internal Testing.

3. Select the Task tab and then, in the Font group, click the expand button at the lower-right corner of that group. The Font dialog box appears.

4. Change the font color to black and the background color to yellow. Your screen should look similar to the figure on the next slide.

Step-by-Step: Modify the Appearance of a Single Piece of Text

# Step-by-Step: Modify the Appearance of a Single Piece of Text

5. Click OK. Notice that only that cell has changed font and background color.

6. SAVE the project schedule.

• PAUSE. LEAVE the project schedule open to use in the next exercise.

Creating Custom Fields

- With Microsoft Project, you have the ability to create custom, user-defined fields to meet your needs. Custom fields are the starting point for you to create customized tables, views, and reports.

- In the following exercise, you will create two custom text fields. A ***custom field*** is a user-definable field. Text fields are available for you to enter any type of text-based information. In this exercise, you will create a custom field for the survey location and another for the name of the authority who will approve those locations.

- When planning your project, ensure there is justification to set up custom fields. In other words, collecting and recording data simply because the option is available does not mean it is necessarily a good idea. The data you collect and record should add value.

Step-by-Step: Create a Custom Text Field

- GET READY. USE the project schedule from the previous exercise.

1. Click the Format tab. Then, click Custom Fields. The Custom Fields dialog box appears, as shown in the figure at right.
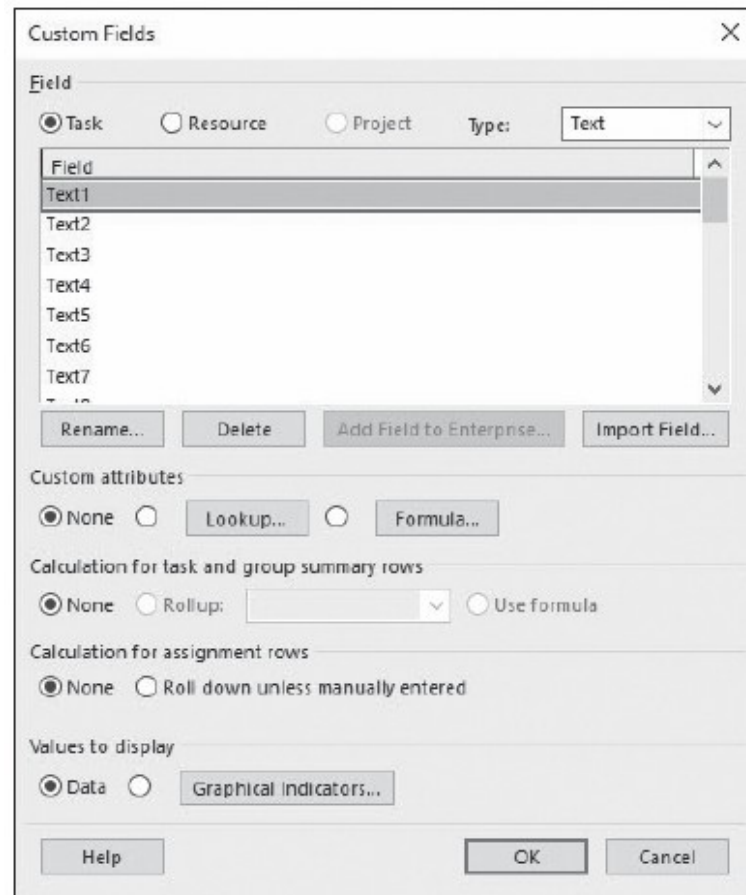
Step-by-Step: Create a Custom Text Field

2. Click once on the Text1 field and then click the Rename button.

3. In the Rename Field dialog box, key Location and then click OK. This field will hold information about the location of where surveys, focus groups, and observations will be conducted.

4. Click once on the Text2 field and then click the Rename button.

5. In the Rename Field dialog box, key Approving Authority and then click OK. This field will hold the name of the approving authority at the location where surveys, focus groups, and observations will be conducted.

6. Click OK to close the Custom Fields dialog box.

7. SAVE and close the project schedule.

- PAUSE. LEAVE Microsoft Project open to use in the next exercise.

Creating Custom Fields

The table below (which continues on the next slide) displays all nine categories of custom fields, their primary use, the type of entry, the number of fields available, and in which database these fields can be used.

CATEGORY	PURPOSE OR USE	ENTRY TYPE	NUMBER AVAILABLE	AVAILABLE DATABASE
Cost	Used to display cost-based information and will display in the units selected in the options. Can be used as a variable in calculations.	Calculated or Entered	10	All
Date	Used to display date-based information and will display in the format chosen in the options. Can be used as a variable in calculations.	Calculated or Entered	10	All
Duration	Used to display duration-based information. Can be used as a variable in calculations.	Calculated or Entered	10	All
Finish	Primarily used in the Interim Plan feature. Used to display date-based information. Can be used as a variable in calculations.	Calculated or Entered	10	All

Creating Custom Fields

CATEGORY	PURPOSE OR USE	ENTRY TYPE	NUMBER AVAILABLE	AVAILABLE DATABASE
Flag	Used to set a flag (Yes/No) and will display a Yes or No. Can be used as a conditional variable in calculations.	Calculated or Entered	20	All
Number	Used for numerical information not covered by another field. Can be used as a variable in calculations.	Calculated or Entered	20	All
Start	Primarily used in the Interim Plan feature. Used to display date-based information. Can be used as a variable in calculations.	Calculated or Entered	10	All
Text	Used for any type of text-based information. Certain values of text can display based on a calculation.	Calculated or Entered	30	All
Outline Code	Used to define a structure for tasks or resources only (not used for assignments).	Entered (static)	10	Task/Resource

Creating and Editing Tables

- Within Microsoft Project are a number of different tables that can be used in various views. These tables contain most of the commonly used data fields. However, you can create new tables that contain exactly the data you want, such as custom fields, or you can modify any predefined table to meet your needs.

- In the following exercise, you will create a custom table to display the information typically found on a video shooting schedule. You will then modify an existing table to include additional data that was important to your project schedule.

- As you create future project schedules, keep in mind that you have three options when setting up tables: You can create a new table, redefine an existing table, or copy an existing table and modify it as needed. Also note that as you modify any table, you are changing the definition of that table.

Step-by-Step: Create a Custom Table

- GET READY. OPEN the *Tailspin Remote Drone 8MA* project schedule from the data files for this lesson. SAVE the file as *Tailspin Remote Drone 8A* in the solutions folder.

1. Click the View tab, click Tables, and then click More Tables. The More Tables dialog box appears and displays all of the predefined tables available to you, depending on the type of view currently displayed (task or resource).

2. Confirm that the Task button is selected as the Tables option. Select Entry and then click the Copy button. The Table Definition dialog box appears.

3. In the Name box, key External Research Schedule Table. Check the Show in menu check box located to the right of the Name box. Now, you will customize the table.

Step-by-Step: Create a Custom Table

4. In the Field Name column, select the following field names and then click Delete Row after selecting each field name:

    Indicators

    Task Mode

    Duration

    Finish

    Predecessors

    Resource Names

    After you have deleted these fields, your screen should look similar to the figure on the next slide.

5. In the Field Name column, click the down arrow in the next empty cell below Start, and then key or select Location (Text1).

Step-by-Step: Create a Custom Table

6. In the Align Data column in the same row, select Left. In the Width column, key or select 40.

7. In the Field Name column in the next empty row below Location, select Approving Authority (Text 2) from the drop-down list.

Step-by-Step: Create a Custom Table

8. In the Align Data column in the same row, select Left. In the Width column, key or select 30.

9. In the Field Name column, select Start, and then click the Cut Row button.

10. In the Field Name column, select Name, and then click the Paste Row button.

11. In the Align Data column in the Start row, select Left. In the Width column, key or select 30.

12. In the Align Data column in the Name row, select Left. In the Width column, key or select 60.

13. In the Date Format box, select Wed 1/28/09 12:33 pm. Your screen should look similar to the figure on the next slide.

Step-by-Step: Create a Custom Table

Step-by-Step: Create a Custom Table

14. Click OK to close the Table Definition dialog box. The new table is highlighted in the More Tables dialog box.

15. Click Apply. Microsoft Project applies the new table to the Task Sheet view. Your screen should look similar to the figure on the next slide.

16. SAVE the project schedule.

- PAUSE. LEAVE the project schedule open to use in the next exercise.

Step-by-Step: Create a Custom Table

Creating Custom Fields

- Microsoft Project includes numerous predefined views. You can use these views, edit an existing view, or create your own view.

- In this exercise, you create a custom view using the custom filter and custom table you created in earlier lessons. This custom view will enable you to look at information that is of interest to you.

- Recall that a view is a window through which you can see the various elements of a project schedule in a way that is helpful to the viewing audience.

- As you will learn in this exercise, a view might contain elements such as tables, groups, or filters. You can combine these with other elements to create almost limitless custom views to suit any purpose.

Step-by-Step: Create a Custom View

- GET READY. USE the project schedule you created in the previous exercise.

1. On the View ribbon, click the down arrow under the Gantt Chart button in the Task Views group, and then click More Views. The More Views dialog box appears, displaying all of the predefined views available to you.

2. Click the New button. The Define New View dialog box appears. Most views use only a single pane, but a view can consist of two separate panes.

3. Make sure Single View is selected and then click OK. The View Definition dialog box appears.

4. In the Name box, key External Research Schedule View.

Step-by-Step: Create a Custom View

5. In the Screen box, select Task Sheet from the drop-down list.

6. In the Table box, select External Research Schedule Table from the drop-down list. The specific groups in the drop-down list depend on the type of view you selected in step 5 (task or resource).

7. In the Group box, select No Group from the drop-down list. The specific groups in the drop-down list again depend on the type of view you selected in step 5.

8. In the Filter box, select Unfinished External Research Tasks from the drop-down list. The specific groups in the drop-down list depend on the type of view you selected in step 5. The View Definition dialog box shows all the elements that can make up a view. Your screen should look similar to the figure on the next slide.

Step-by-Step: Create a Custom View
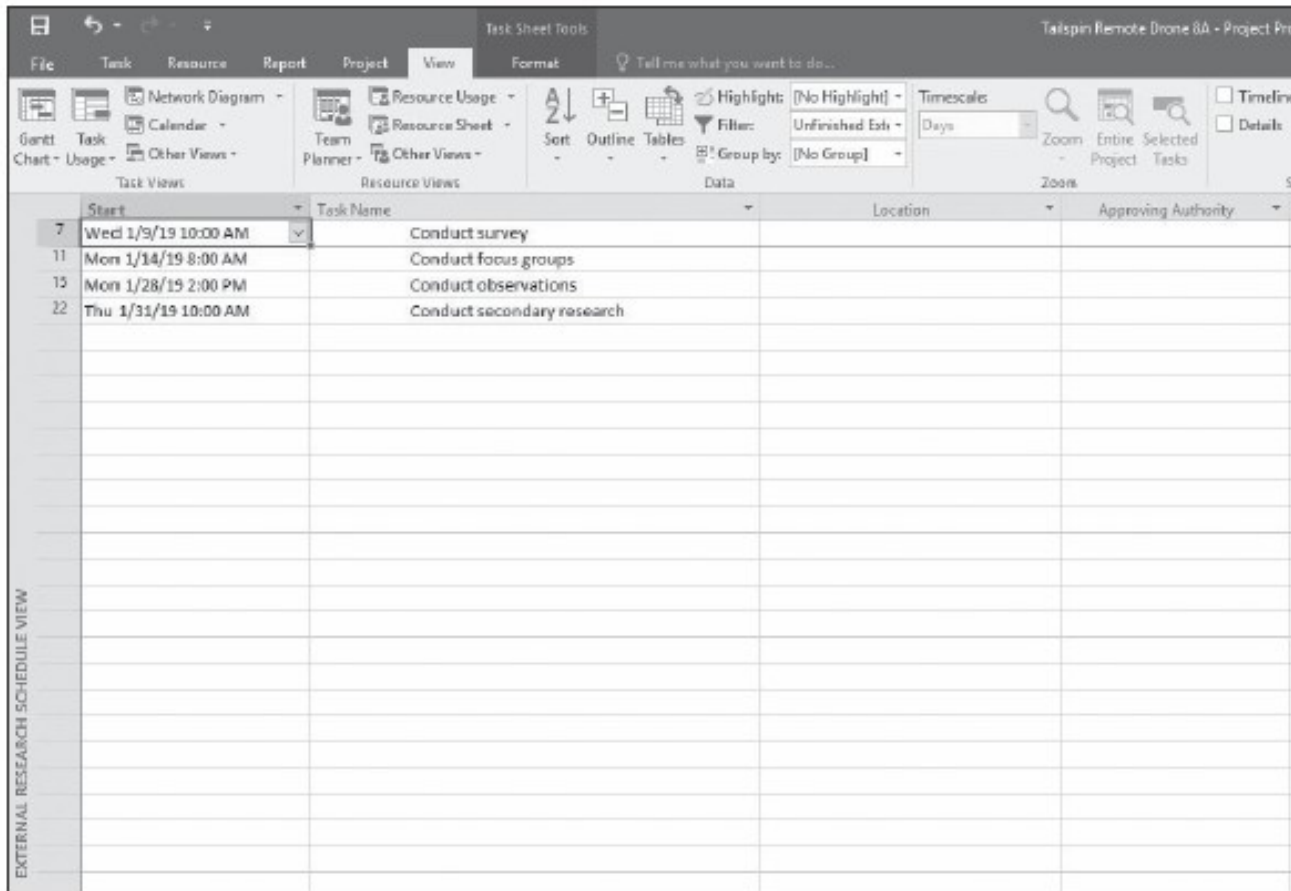
Step-by-Step: Create a Custom View

9. Select the Show in menu check box and then click OK to close the View Definition dialog box. The new view appears and should be selected in the More Views dialog box.

10. Click Apply. Microsoft Project applies the new view. Your screen should look similar to the figure on the next slide.

11. SAVE the project schedule. CLOSE the project schedule.

• PAUSE. If you are continuing to the next lesson, keep Microsoft Project open. If you are not continuing to additional lessons, CLOSE Microsoft Project.

Step-by-Step: Create a Custom View

Skill Summary

SKILLS	MATRIX SKILL
Formatting the Gantt Chart • Modifying the Gantt Chart Using the Bar Styles Dialog Box • Modifying the Gantt Chart Using Gantt Chart Styles	Modify the Gantt chart using the Bar Styles dialog box Modify the Gantt chart using Gantt Chart Styles
Modifying Text Appearance in a View • Modifying the Appearance of a Single Piece of Text	Modify the appearance of text in a view Modify the appearance of a single piece of text
Creating Custom Fields	Create a custom text field
Creating and Editing Tables	Create a custom table
Creating Custom Views	Create a custom view