



University OF Hilla  
Engineering Faculty  
Medical Device Technology Engineering



# PROJECT MANAGEMENT

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## Lecture 7

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## To view or edit assignment details in the Task Form view

You can perform these steps in the Task Sheet or Task Usage view, or any Gantt chart view.

1. On the **View** tab, in the **Split View** group, select the **Details** check box. Project splits the window into two panes with the Task Form view in the bottom pane.
2. Click anywhere in the Task Form view. With the focus on the Task Form, note that the label of the Format tab changes to Task Form Tools. Now the commands available on the Format tab apply to the Task Form.
3. On the **Format** tab, in the **Details** group, click **Work**. The Work details appear in the Task Form.

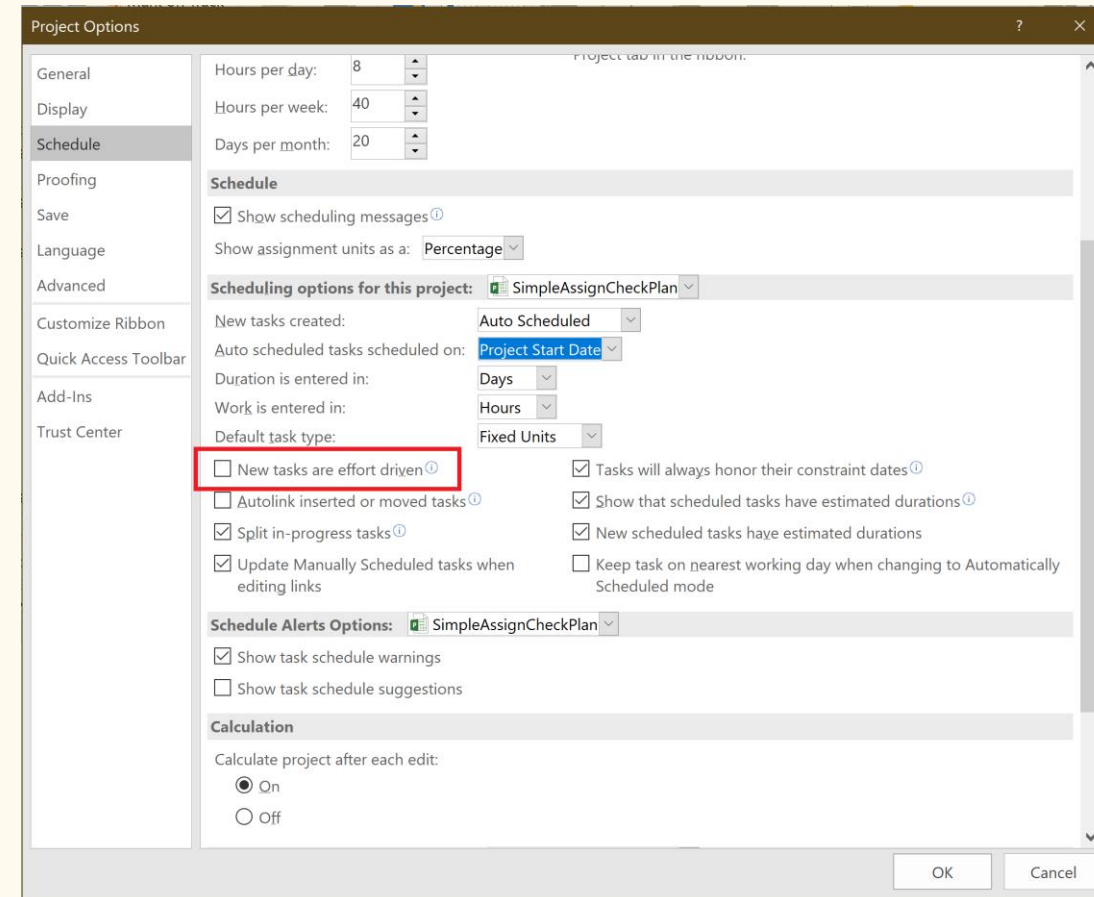
## Control work when adding or removing resource assignments (effort-driven scheduling)

### To manage effort-driven scheduling for a specific task or tasks

1. Select the task or tasks you want.
2. On the **Task** tab, in the **Properties** group, click **Information**.
3. On the **Advanced** tab of the **Task Information** dialog box, select or clear the **Effort Driven** check box.

### To turn on effort-driven scheduling for all new tasks in a plan

1. On the **File** tab, click **Options**.
2. In the **Project Options** dialog box, click **Schedule**.
3. Under **Scheduling Options For This Project**, select the **New Tasks Are Effort Driven** check box.



## Check the plan after assigning resources

- Who is assigned to do what work in the plan?
- How long will it take to complete the project?
- How much will it cost?

You can customize the field from drop menu

| TASK SHEET | Task Name            | Fixed Cost | Fixed Cost Accrual | Total Cost  | Baseline | Variance    | Actual | Remaining   |
|------------|----------------------|------------|--------------------|-------------|----------|-------------|--------|-------------|
|            | 0 New book launch    | \$0.00     | Prorated           | 19,740.00   | \$0.00   | \$19,740.00 | \$0.00 | 19,740.00   |
|            | 1 Planning Phase     | \$0.00     | Prorated           | \$11,900.00 | \$0.00   | \$11,900.00 | \$0.00 | \$11,900.00 |
|            | 2 Assign launch te   | \$0.00     | Prorated           | \$420.00    | \$0.00   | \$420.00    | \$0.00 | \$420.00    |
|            | 3 Complete autho     | \$0.00     | Prorated           | \$0.00      | \$0.00   | \$0.00      | \$0.00 | \$0.00      |
|            | 4 Schedule autho     | \$0.00     | Prorated           | \$1,680.00  | \$0.00   | \$1,680.00  | \$0.00 | \$1,680.00  |
|            | 5 Design and orde    | \$0.00     | Prorated           | \$9,800.00  | \$0.00   | \$9,800.00  | \$0.00 | \$9,800.00  |
|            | 6 Planning compl     | \$0.00     | Prorated           | \$0.00      | \$0.00   | \$0.00      | \$0.00 | \$0.00      |
|            | 7 Internal Launch Ph | \$0.00     | Prorated           | \$7,040.00  | \$0.00   | \$7,040.00  | \$0.00 | \$7,040.00  |
|            | 8 Kickoff book lau   | \$0.00     | Prorated           | \$650.00    | \$0.00   | \$650.00    | \$0.00 | \$650.00    |
|            | 9 Plan author's tra  | \$0.00     | Prorated           | \$2,640.00  | \$0.00   | \$2,640.00  | \$0.00 | \$2,640.00  |
|            | 10 Channel Sales p   | \$0.00     | Prorated           | \$3,750.00  | \$0.00   | \$3,750.00  | \$0.00 | \$3,750.00  |
|            | 11 Complete book     | \$0.00     | Prorated           | \$0.00      | \$0.00   | \$0.00      | \$0.00 | \$0.00      |
|            | 12 Prepare book sa   | \$0.00     | Prorated           | \$0.00      | \$0.00   | \$0.00      | \$0.00 | \$0.00      |
|            | 13 Distribute inter  | \$0.00     | Prorated           | \$0.00      | \$0.00   | \$0.00      | \$0.00 | \$0.00      |
|            | 14 Public Launch Pha | \$0.00     | Prorated           | \$800.00    | \$0.00   | \$800.00    | \$0.00 | \$800.00    |
|            | 15 Author travel ar  | \$0.00     | Prorated           | \$800.00    | \$0.00   | \$800.00    | \$0.00 | \$800.00    |
|            | 16 Author radio      | \$0.00     | Prorated           | \$0.00      | \$0.00   | \$0.00      | \$0.00 | \$0.00      |
|            | 17 Author readi      | \$0.00     | Prorated           | \$800.00    | \$0.00   | \$800.00    | \$0.00 | \$800.00    |

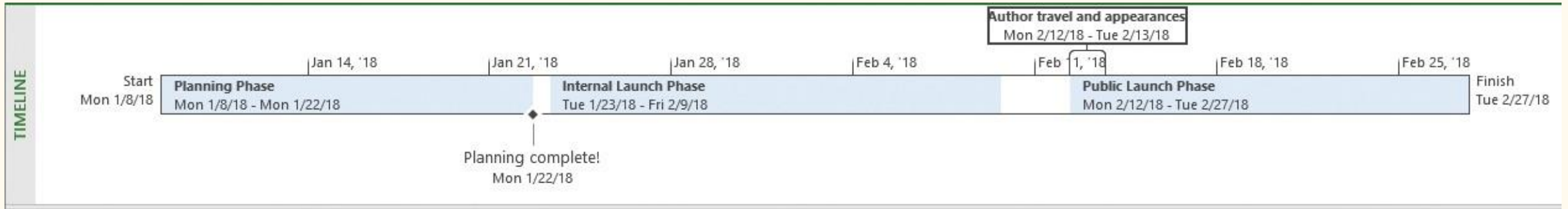
| TASK USAGE | Task Mode ▾ | Task Name ▾          | Duration ▾ | Start ▾     | Finish ▾    | % Comp ▾ | Cost ▾      | Work ▾  | Details | S | Jan 7, '18 | M   |
|------------|-------------|----------------------|------------|-------------|-------------|----------|-------------|---------|---------|---|------------|-----|
|            | 0           | ▸ New book launch    | 36 days    | Mon 1/8/18  | Tue 2/27/18 | 0%       | \$19,740.00 | 396 hrs | Work    |   |            | 10h |
|            | 1           | ▸ Planning Phase     | 11 days    | Mon 1/8/18  | Mon 1/22/18 | 0%       | \$11,900.00 | 248 hrs | Work    |   |            | 10h |
|            | 2           | ▸ Assign launch te   | 1 day      | Mon 1/8/18  | Mon 1/8/18  | 0%       | \$420.00    | 8 hrs   | Work    |   |            | 8h  |
|            |             | Carole Polar         |            | Mon 1/8/18  | Mon 1/8/18  |          | \$420.00    | 8 hrs   | Work    |   |            | 8h  |
|            | 3           | ▸ Complete autho     | 1 wk       | Tue 1/9/18  | Mon 1/15/18 | 0%       | \$0.00      | 40 hrs  | Work    |   |            |     |
|            |             | Toni Poe             |            | Tue 1/9/18  | Mon 1/15/18 |          | \$0.00      | 40 hrs  | Work    |   |            |     |
|            | 4           | ▸ Schedule autho     | 1 wk       | Mon 1/8/18  | Mon 1/15/18 | 0%       | \$1,680.00  | 40 hrs  | Work    |   |            | 2h  |
|            |             | Jun Cao              |            | Mon 1/8/18  | Mon 1/15/18 |          | \$1,680.00  | 40 hrs  | Work    |   |            | 2h  |
|            | 5           | ▸ Design and orde    | 2 wks      | Tue 1/9/18  | Mon 1/22/18 | 0%       | \$9,800.00  | 160 hrs | Work    |   |            |     |
|            |             | Toby Nixon           |            | Tue 1/9/18  | Mon 1/22/18 |          | \$5,400.00  | 80 hrs  | Work    |   |            |     |
|            |             | Zac Woodal           |            | Tue 1/9/18  | Mon 1/22/18 |          | \$4,400.00  | 80 hrs  | Work    |   |            |     |
|            | 6           | Planning compl       | 0 days     | Mon 1/22/18 | Mon 1/22/18 | 0%       | \$0.00      | 0 hrs   | Work    |   |            |     |
|            | 7           | ▸ Internal Launch Ph | 13 days    | Tue 1/23/18 | Fri 2/9/18  | 0%       | \$7,040.00  | 140 hrs | Work    |   |            |     |
|            | 8           | ▸ Kickoff book lau   | 1 day      | Tue 1/23/18 | Tue 1/23/18 | 0%       | \$650.00    | 12 hrs  | Work    |   |            |     |
|            |             | Sharon Sala          |            | Tue 1/23/18 | Tue 1/23/18 |          | \$110.00    | 4 hrs   | Work    |   |            |     |
|            |             | Toby Nixon           |            | Tue 1/23/18 | Tue 1/23/18 |          | \$540.00    | 8 hrs   | Work    |   |            |     |
|            | 9           | ▸ Plan author's tra  | 6 days     | Wed 1/24/18 | Thu 2/1/18  | 0%       | \$2,640.00  | 48 hrs  | Work    |   |            |     |
|            |             | Jane Dow             |            | Wed 1/24/18 | Thu 2/1/18  |          | \$2,640.00  | 48 hrs  | Work    |   |            |     |

The Task Usage view groups the assigned resources below each task and shows you, among other things, assignment details rolled up per task

| RESOURCE USAGE | Resource Name ▾ | Group ▾ | Max. Units ▾ | Pt ▾ | Std. Rate ▾ | Ovt. Rate ▾ | Cost ▾     | Work ▾ | Details | Jan 21, '18 |   |   |
|----------------|-----------------|---------|--------------|------|-------------|-------------|------------|--------|---------|-------------|---|---|
|                |                 |         |              |      |             |             |            |        |         | S           | M | T |
|                | ▲ Unassigned    |         | 100%         | 0%   | \$0.00/hr   | \$0.00/hr   | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Planning corr   |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Complete bo     |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Prepare book    |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Distribute int  |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Author radio    |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Distribute ad   |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Distribute bo   |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Coordinate r    |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Launch publi    |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Launch social   |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
|                | Launch comp     |         |              | 100% |             |             | \$0.00     | 0 hrs  | Work    |             |   |   |
| 1              | ▲ Carole Poland |         | 100%         | 100% | 100.00/wk   | \$0.00/hr   | \$420.00   | 8 hrs  | Work    |             |   |   |
|                | Assign launch   |         |              | 100% |             |             | \$420.00   | 8 hrs  | Work    |             |   |   |
| 2              | Copyeditors     |         | 400%         | 0%   | \$45.00/hr  | \$0.00/hr   | \$0.00     | 0 hrs  | Work    |             |   |   |
| 3              | Dan Jump        |         | 50%          | 0%   | \$75.50/hr  | \$0.00/hr   | \$0.00     | 0 hrs  | Work    |             |   |   |
| 4              | ▲ Hany Morcos   |         | 100%         | 100% | 550.00/wk   | \$0.00/hr   | \$1,550.00 | 40 hrs | Work    |             |   |   |
|                | Channel Sale    |         |              | 100% |             |             | \$1,550.00 | 40 hrs | Work    |             |   |   |
| 5              | ▲ Jane Dow      |         | 100%         | 100% | \$55.00/hr  | \$0.00/hr   | \$2,640.00 | 48 hrs | Work    |             |   |   |
|                | Plan author's   |         |              | 100% |             |             | \$2,640.00 | 48 hrs | Work    |             |   |   |
| 6              | John Evans      |         | 100%         | 0%   | 780.00/wk   | \$0.00/hr   | \$0.00     | 0 hrs  | Work    |             |   |   |
| 7              | ▲ Jun Cao       |         | 100%         | 100% | \$42.00/hr  | \$63.00/hr  | \$1,680.00 | 40 hrs | Work    |             |   |   |
|                | Schedule aut    |         |              | 100% |             |             | \$1,680.00 | 40 hrs | Work    |             |   |   |

The Resource Usage view groups the assigned tasks below each resource and shows you, among other things, assignment details rolled up per resource

## Add tasks to a Timeline view



## To add existing tasks to a Timeline view

1. Click anywhere in a Timeline view.
2. On the **Format** tab, in the **Insert** group, click **Existing Tasks**
3. Select the tasks you want to appear on the Timeline, and then click **OK**.

Or

1. In the active task view, click the task you want to appear on the Timeline.
2. On the **Task** tab, in the **Properties** group, click **Add to Timeline**.

Or

1. Right-click the task and click **Add to Timeline** in the shortcut menu that appears.

## To add a new task to a Timeline view

1. Click anywhere in a Timeline view.
2. On the **Format** tab, in the **Insert** group, click **Task**.
3. In the **Task Information** dialog box, enter the new task's information, and then click **OK**.

MS Project adds the new task to the plan. It will be visible both in the Timeline and Gantt Chart views.

Project adds the new task to the plan. It will be visible both in the Timeline and Gantt Chart views.

## To switch task bars to callouts in the Timeline view

1. Click anywhere in the Timeline view.
2. In the **Timeline** view, click a task bar you want to display as a callout.
3. On the **Format** tab, in the **Current Selection** group, click **Display as Callout**.

## Customize reports

### To display a report

1. On the **Report** tab, in the **View Reports** group, click a category, and then click the specific report you want.

### To apply a style to a chart in a report

1. Display the report that includes a chart that you want to style.
2. Click anywhere in the chart.
3. On the **Chart Tools Design** tab, in the **Chart Styles** group, click the style you want.

### To apply a style to a table in a report

1. Display the report that includes a table that you want to style.
2. Click anywhere in the table.
3. On the **Table Tools Design** tab, in the **Table Styles** group, click the style you want.

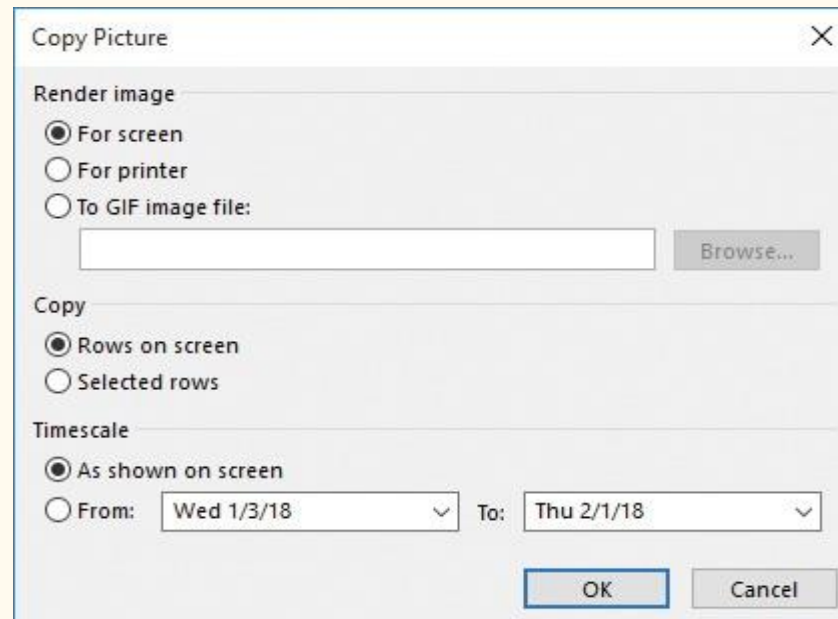
## Copy views and reports

### To copy a view

Use this technique to copy a Gantt chart and most other views in Project.

1. Set up the view the way you want it to appear when copied. For example, in a Gantt chart view, you can scroll to display the range of tasks you want to copy, and their Gantt bars.
2. On the **Task** tab, in the **Clipboard** group, click the arrow next to **Copy**, and then click **Copy Picture**.
3. Select the copy options you want, and then click **OK**.

Ms Project copies a graphic image of the view to the Clipboard. You can then paste it into another program



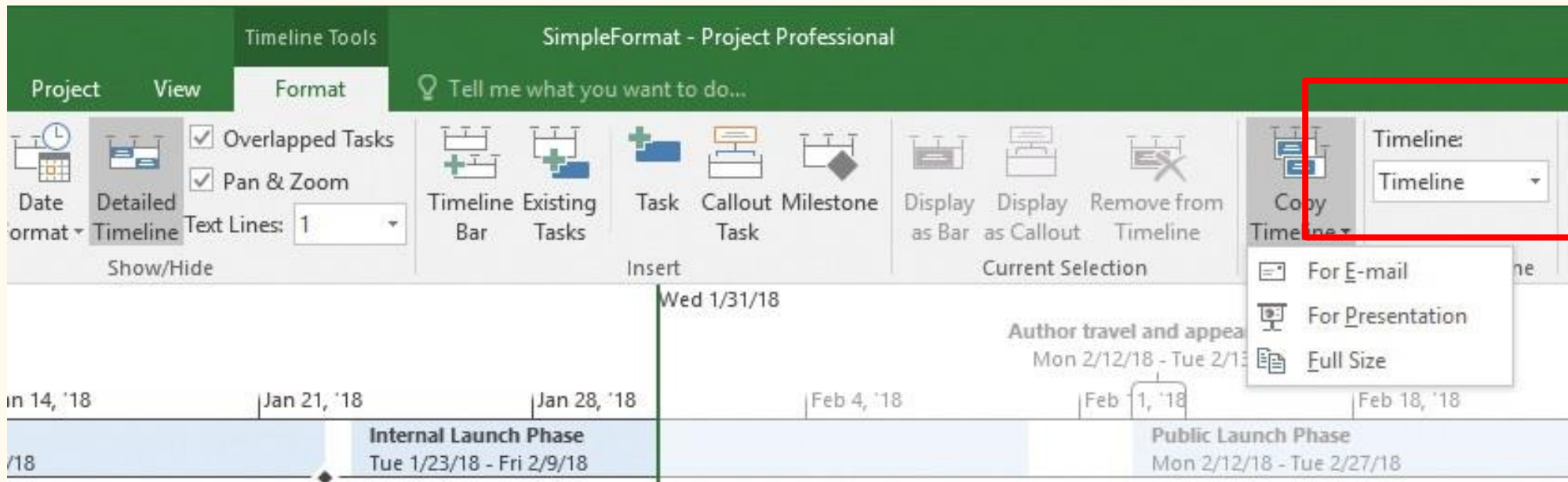
## To copy a Timeline view

1. Click anywhere in the Timeline view with the focus now on the Timeline, the label of the Format tab changes to Timeline Tools.

2. On the **Format** tab, in the **Copy** group, click **Copy Timeline**.

The Copy Timeline options appear.

3. Click the sizing option you want. Project copies the timeline to the Clipboard.



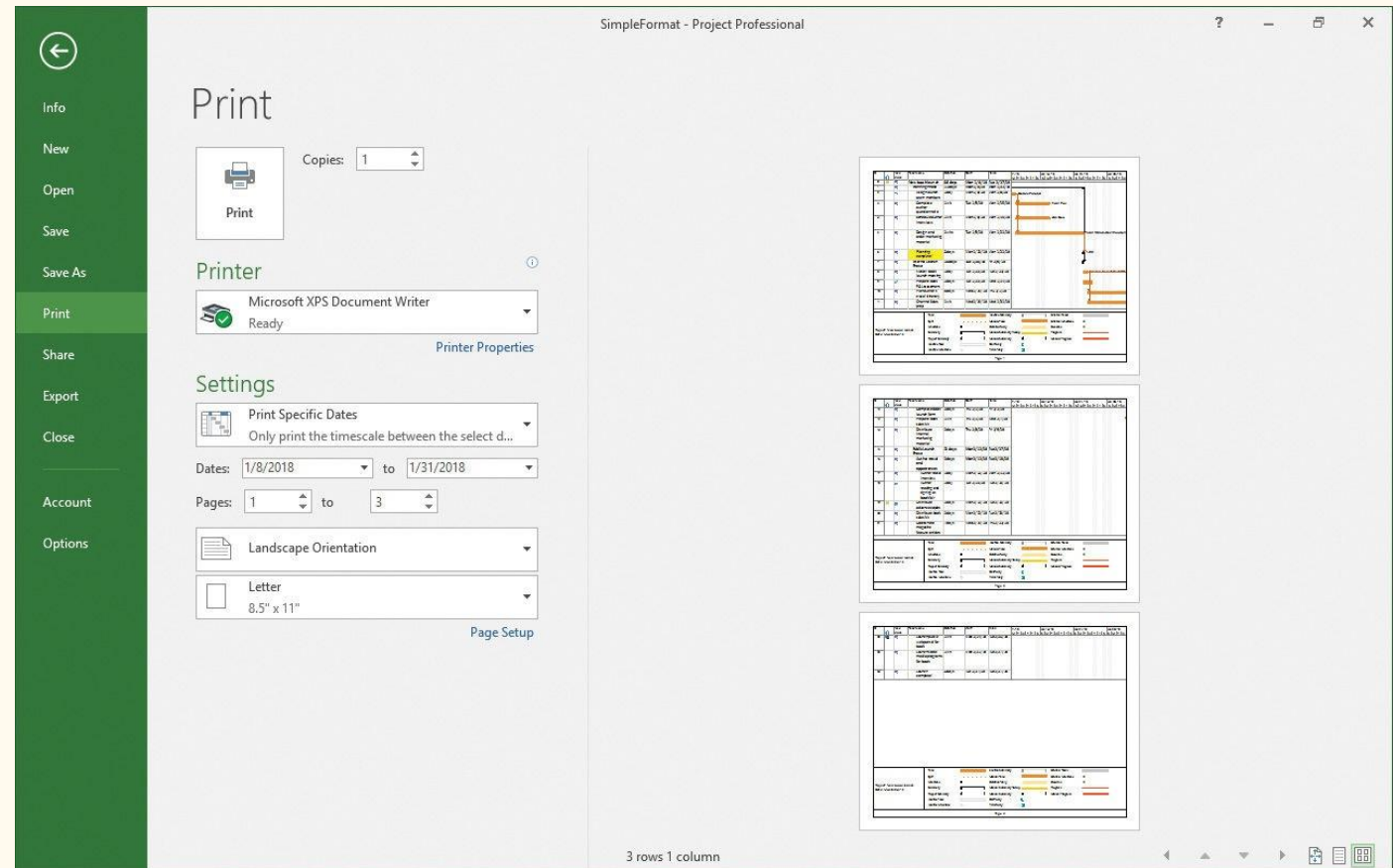
## To copy a report

1. On the **Report** tab, in the **View Reports** group, display the report you want.
2. Click anywhere in the report and then, on the **Report Tools Design** tab, in the **Report** group, click **Copy Report**.

Project copies a graphic image of the entire report to the Clipboard.

*Use the Print options to control how a Gantt chart view will appear when printed*

## Print views and reports



### To print a view

1. On the **View** tab, in the **Task Views** group, display the view you want to print.
2. On the **File** tab, click **Print**.

The Print page of the Backstage view is displayed with the view in the preview.

3. Select the options you want, and then click **Print**.

### To print a report

1. On the **Report** tab, in the **View Reports** group, display the report you want to print.
2. On the **Report Tools Design** tab, in the **Page Setup** group, select any options you want.
3. On the **File** tab, click **Print**.

The Print page of the Backstage view is displayed with the report in the preview.

4. Select the options you want, and then click **Print**.

### To adjust page setup options in a report

1. Display the report whose page setup options you want to adjust.
2. Click the **Report Tools Design** tab.

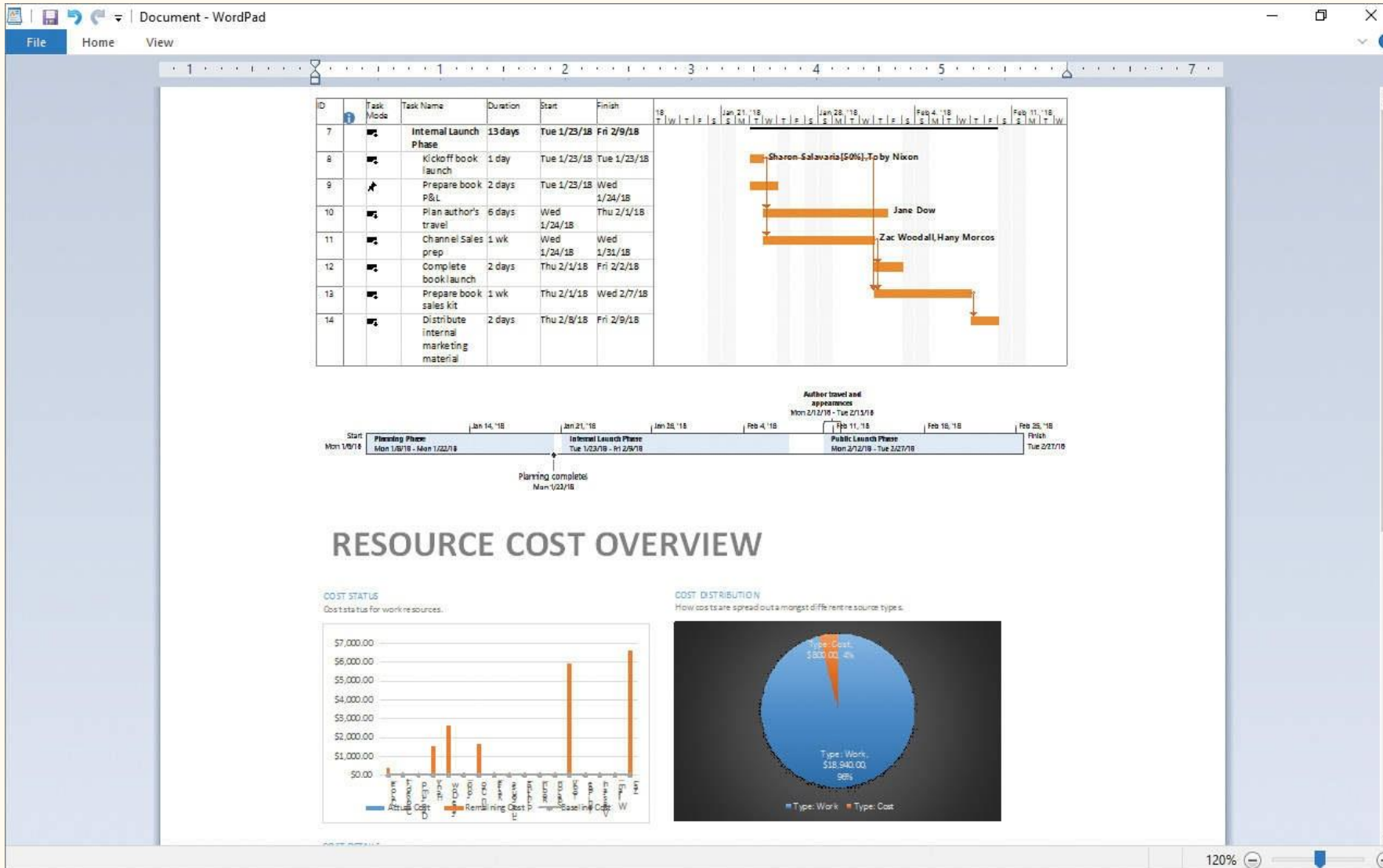
In the Page Setup group, note the four commands available.

3. Do any of the following:

- Click **Page Breaks** to see where the page breaks will occur in the report based on your currently selected paper size.
- Click **Margins** to adjust the page margins of the report when printed.
- Click **Orientation** to switch the report between landscape (horizontal) and portrait (vertical) layout.
- Click **Size** to select your paper size.

## Copy views and reports

You can customize you report a follows



## Track progress: Basic techniques

1. Saving a baseline of your plan,
2. Tracking a plan as scheduled,
3. Entering a task's completion percentage
4. Entering actual values for tasks.

By properly tracking project performance and comparing it with the original plan (as saved in a baseline), you are able to answer such questions as the following:

1. Are tasks starting and finishing as planned? If not, what will be the impact on the project's finish date?
2. Are resources spending more or less time than planned to complete tasks?
3. Are higher-than-anticipated task costs driving up the overall cost of the project?
4. When planning similar projects in the future, will you be able to determine how good your (or the team's) estimating skills were in prior projects?

# Save a baseline of your plan

When you save a baseline, Ms Project takes a snapshot of the existing values and saves it in your plan for future comparison. You should save a baseline when:

- 1. You have developed the plan as fully as possible. (However, this does not mean that you cannot add tasks, resources, or assignments to the plan after work has started this is often unavoidable.)
- 2. You have not yet started entering actual values, such as a task’s percentage of completion.
- 3. You want to save a subsequent baseline (up to 11 per plan).

| Task fields              | Resource fields          | Assignment fields        |
|--------------------------|--------------------------|--------------------------|
| Start                    | Work and timephased work | Start                    |
| Finish                   | Cost and timephased cost | Finish                   |
| Duration                 |                          | Work and timephased work |
| Work and timephased work |                          | Cost and timephased cost |
| Cost and timephased cost |                          |                          |

*Project supports not just one baseline, but up to 11 baselines in a single plan. The first one*

*is called Baseline, and the rest are Baseline 1 through Baseline 10.*

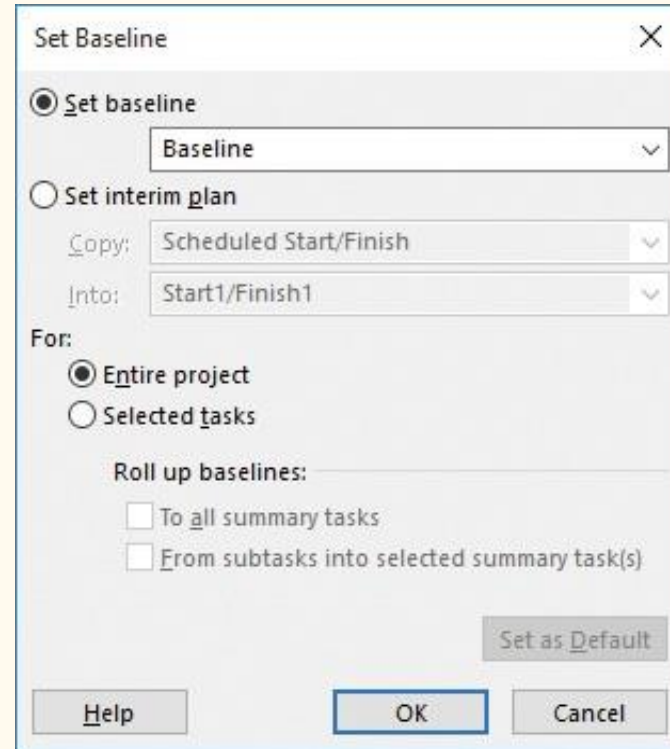
*Displaying the Variance table is a great way to compare tasks' scheduled and baseline values*

| TASK SHEET | Task Mode ▾ | Task Name ▾      | Start ▾     | Finish ▾    | Baseline Start ▾ | Baseline Finish ▾ | Start Var. ▾ | Finish Var. ▾ |
|------------|-------------|------------------|-------------|-------------|------------------|-------------------|--------------|---------------|
|            | 0           | ▶ New book laun  | Mon 1/8/18  | Fri 3/2/18  | Mon 1/8/18       | Tue 2/27/18       | 0 days       | 3 days        |
|            | 1           | ▶ Planning Phas  | Mon 1/8/18  | Mon 1/22/18 | Mon 1/8/18       | Mon 1/22/18       | 0 days       | 0 days        |
|            | 2           | Assign laun      | Mon 1/8/18  | Mon 1/8/18  | Mon 1/8/18       | Mon 1/8/18        | 0 days       | 0 days        |
|            | 3           | Complete a       | Tue 1/9/18  | Mon 1/15/18 | Tue 1/9/18       | Mon 1/15/18       | 0 days       | 0 days        |
|            | 4           | Schedule al      | Mon 1/8/18  | Mon 1/15/18 | Mon 1/8/18       | Mon 1/15/18       | 0 days       | 0 days        |
|            | 5           | Design and       | Tue 1/9/18  | Mon 1/22/18 | Tue 1/9/18       | Mon 1/22/18       | 0 days       | 0 days        |
|            | 6           | Planning co      | Mon 1/22/18 | Mon 1/22/18 | Mon 1/22/18      | Mon 1/22/18       | 0 days       | 0 days        |
|            | 7           | ▶ Internal Launc | Tue 1/23/18 | Wed 2/14/18 | Tue 1/23/18      | Fri 2/9/18        | 0 days       | 3 days        |
|            | 8           | Kickoff bool     | Tue 1/23/18 | Tue 1/23/18 | Tue 1/23/18      | Tue 1/23/18       | 0 days       | 0 days        |
|            | 9           | Prepare boc      | Wed 1/24/18 | Mon 1/29/18 | Wed 1/24/18      | Fri 1/26/18       | 0 days       | 1 day         |
|            | 10          | Plan author      | Tue 1/23/18 | Thu 2/1/18  | Wed 1/24/18      | Thu 2/1/18        | -1 day       | 0 days        |
|            | 11          | Channel Sal      | Wed 1/24/18 | Mon 2/5/18  | Wed 1/24/18      | Wed 1/31/18       | 0 days       | 3 days        |
|            | 12          | Complete b       | Tue 2/6/18  | Wed 2/7/18  | Thu 2/1/18       | Fri 2/2/18        | 3 days       | 3 days        |
|            | 13          | Prepare boc      | Tue 2/6/18  | Mon 2/12/18 | Thu 2/1/18       | Wed 2/7/18        | 3 days       | 3 days        |
|            | 14          | Distribute it    | Tue 2/13/18 | Wed 2/14/18 | Thu 2/8/18       | Fri 2/9/18        | 3 days       | 3 days        |

## To save a baseline

1. On the **Project** tab, in the **Schedule** group, click **Set Baseline**, and then click **SetBaseline**.

The Set Baseline dialog box opens.



*In the Set Baseline dialog box, you can save or update up to 11 baselines per plan*

2. To save the plan's initial baseline, click **Set Baseline**, and then select **Baseline** from the list
- Or
3. To save a subsequent baseline, click **Set Baseline**, and then select the baseline number you want.

## To clear a previously saved baseline

1. On the **Project** tab, in the **Schedule** group, click **Set Baseline**, and then click **Clear Baseline**.
2. In the **Clear Baseline** dialog box, select the options you want, and then click **OK**.

## To display baseline Gantt bars in a Gantt chart view

1. In a Gantt chart view, on the **Format** tab, in the **Bar Styles** group, click **Baseline**, and then click the baseline (**Baseline** or **Baseline I** through **Baseline I 0**) that you want to display. Project draws baseline Gantt bars for the baseline you choose.

## To display scheduled and baseline values by using the Variance table

1. On the **View** tab, in the **Task Views** group, click **Other Views**, and then click **Task Sheet**.

The Task Sheet view appears. Because this is a tabular view, it does not include a Gantt chart, so more room is available to see the fields in the table.

2. On the **View** tab, in the **Data** group, click **Tables**. Click **Variance**.

THANK YOU