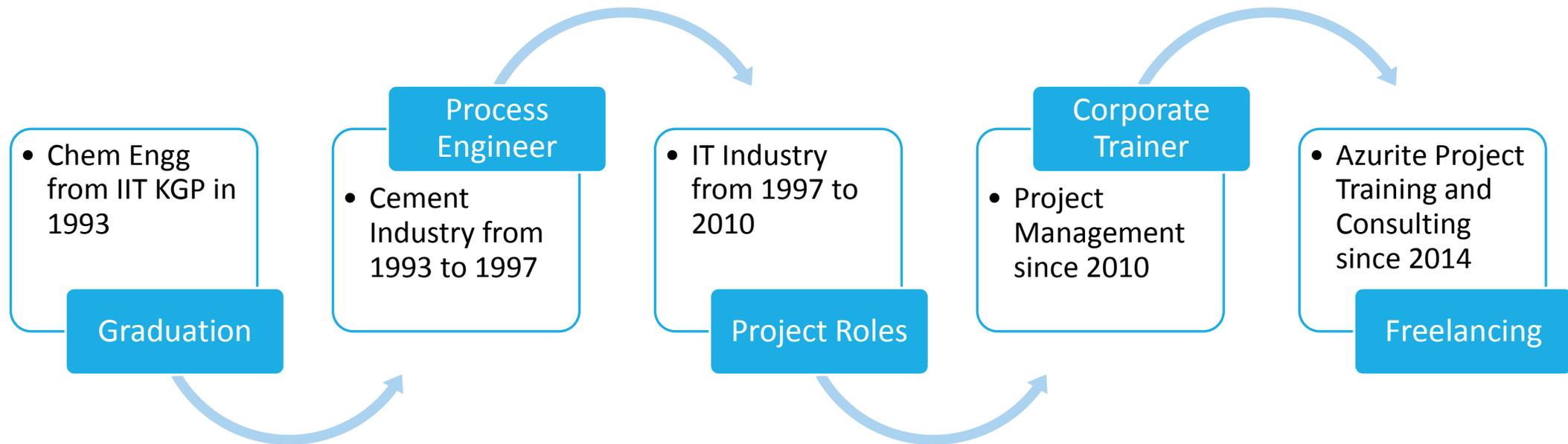


Scheduling - Concepts and MS Project

About the Faculty- Venkat Annapragada



About the Student

Please give a brief introduction covering the following aspects:

- Education
- Work Experience – Years, Industry, Roles
- Project Management Experience
- Purpose of wanting to learn Microsoft Project
- Anything else you think is important for me to know

OVER TO YOU !

Agenda

1. BASICS OF PROJECT AND PROJECT MANAGEMENT

- Definition of Project
- Definition of Project Management
- Product Life Cycle and Project Life Cycle
- Constraints in a Project
- Essential Conditions for success of a project

2. WORK BREAKDOWN STRUCTURE

- Create WBS
- WBS based on phases of Project
- WBS based on Major Deliverables of Project
- WBS for construction Project
- Exercise

3. ESTIMATION

- Principles of Estimation
- Bottom Up Estimation using WBS

Agenda

4. BASICS OF SCHEDULING

- Understanding a Schedule
- What is Scheduling?
- Examples of Schedules
- Define Activities
- Sequence Activities
- Precedence Diagramming Method
- Types of Relationships
- Types of Dependencies
- Task Network Diagram
- Activity Duration
- Critical Path Method
- Exercise

Agenda

5. MICROSOFT PROJECT – STEP 1

- Layout
- Setup Options
- Task Types
- Setup Work Column
- Setup Project Information

6. MICROSOFT PROJECT – STEP 2

- Entering Tasks
- Task Duration Calculation
- Task Rule
- Summary Task and Milestone Task
- Creating Tasks in WBS Format

Agenda

7. MICROSOFT PROJECT – STEP 3

- Task Relationships
- Setting Parallel Paths
- Types of Task Links
- Constraints and Deadlines
- Setting a Constraint
- Setting a Deadline

8. MICROSOFT PROJECT – STEP 4

- Calendars and Creating a Calendar
- Resources and Assigning Resources
- Over Allocation of Resources
- Resource Levelling
- Guidelines for Resource Levelling

Agenda

9. MICROSOFT PROJECT – STEP 5

- Baseline
- Tracking
- Reports
- Impact of Task Types
- Manual Scheduling

Definition of Project

A Project has the following three characteristics :

- UNIQUE

Every project creates a different product, service or result. E.g, construction of a shopping mall. Assembly line manufacture of car parts is NOT a project.

- TEMPORARY

Project has a definite beginning and end. Project is said to complete once objectives are achieved. E.g., construction of flyover with a project deadline. Ongoing work in HR and Finance departments are NOT projects.

- PROGRESSIVELY ELABORATED

The project scope is broadly described early in the project and made more explicit as the project progresses. E.g., When starting to build a house you need to have a broad layout plan in front of you which will be elaborated as the construction progresses.

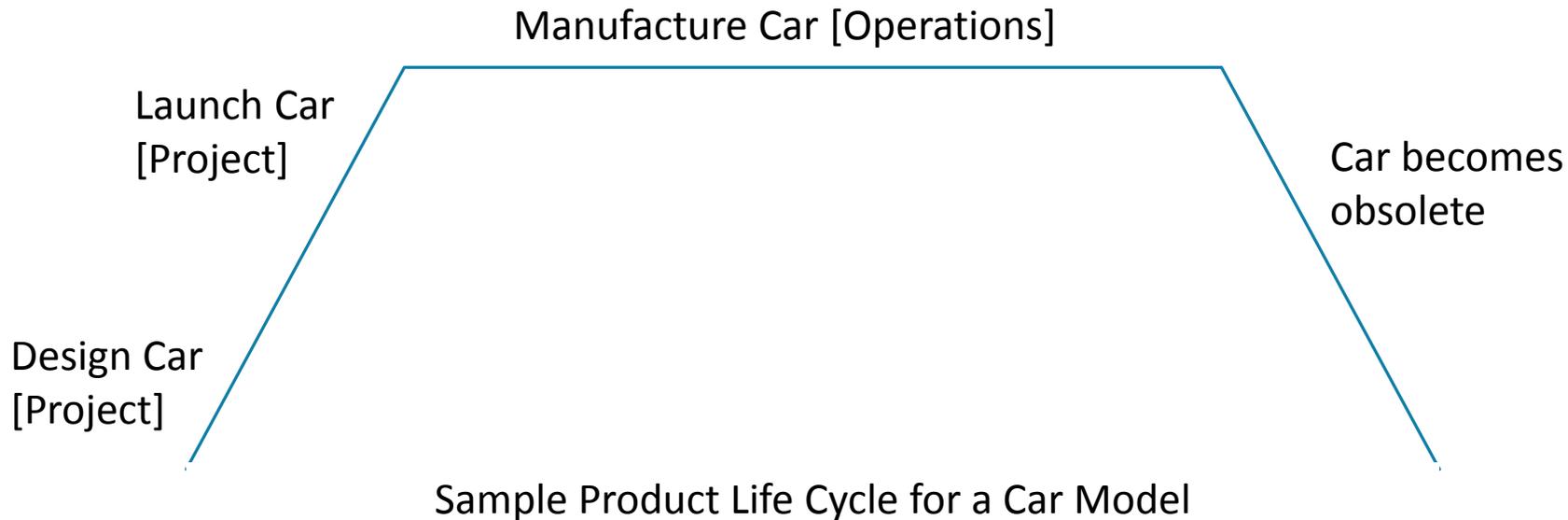
Definition of Project Management

The application of KNOWLEDGE, SKILLS, TOOLS and TECHNIQUES to project activities to meet project requirements



Product Life Cycle

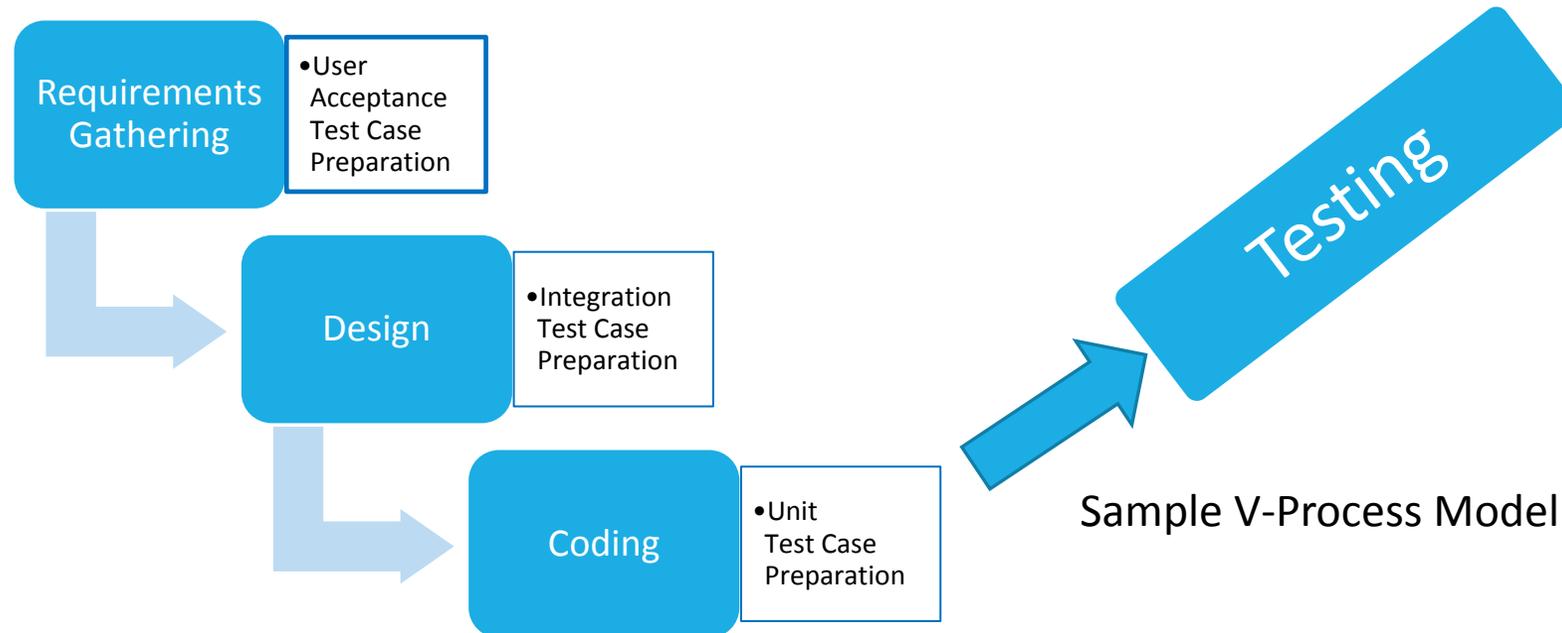
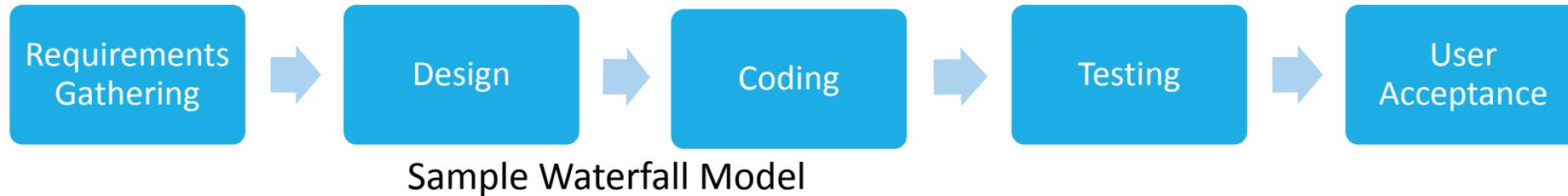
A Product Life Cycle is undertaken to launch a Product. It may have SEVERAL PROJECTS [each with their own project life cycles] and OPERATIONS. Product phases are generally SEQUENTIAL and NON-OVERLAPPING.



Project Life Cycle

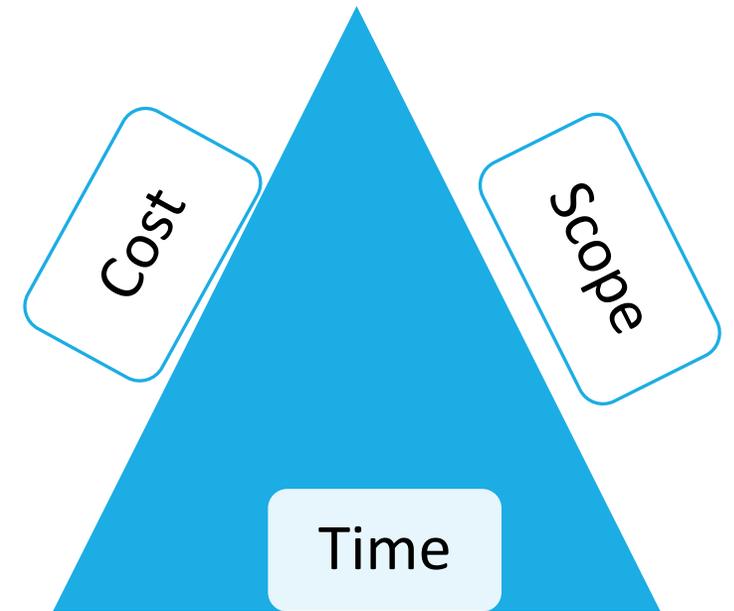
- Project Life Cycle includes all phases required for a project to create a product, service or result
- It is Industry specific and can be different for different projects
- It is divided into project phases for better control of the project
- Phase end reviews are conducted to assess project progress
- Phases can be either sequential or overlapping
- Phases can occur only once or be Iterative
- Common Project Life Cycles in IT Industry :
 - i. Waterfall Model
 - ii. V-Process
 - iii. Agile

Project Life Cycles in IT Industry



Constraints in a Project

- Constraints are factors which project managers must manage simultaneously in a project.
- The three major factors are Scope, Time and Cost which are also called as Triple Constraints.
- Other important factors are quality, customer satisfaction, risk and human resources.



Conditions for Project Success

When do we say a Project is successful?

A. When Project satisfies Predefined Project Success Criteria relating to TIME, COST and QUALITY

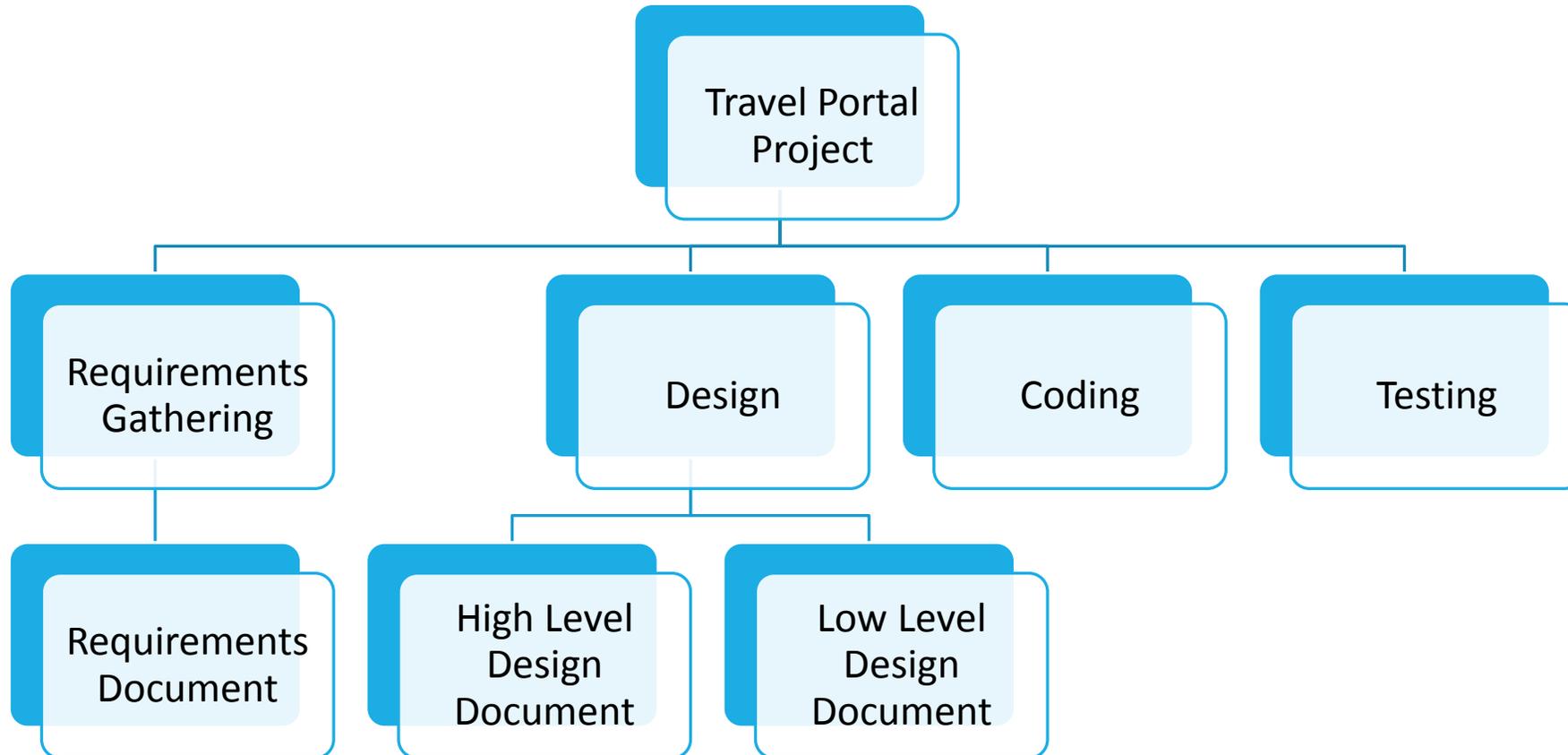
- Top 5 conditions for Projects to be successful:
 - i. Thorough Project Planning and review throughout the Project
 - ii. Overall Goals of the Project should be clearly specified
 - iii. Project should have clear reporting and communication lines
 - iv. The core project team needs to be fully competent
 - v. All important stakeholders should be committed to Project's success

Source : <https://www.apm.org.uk/conditions-for-project-success>

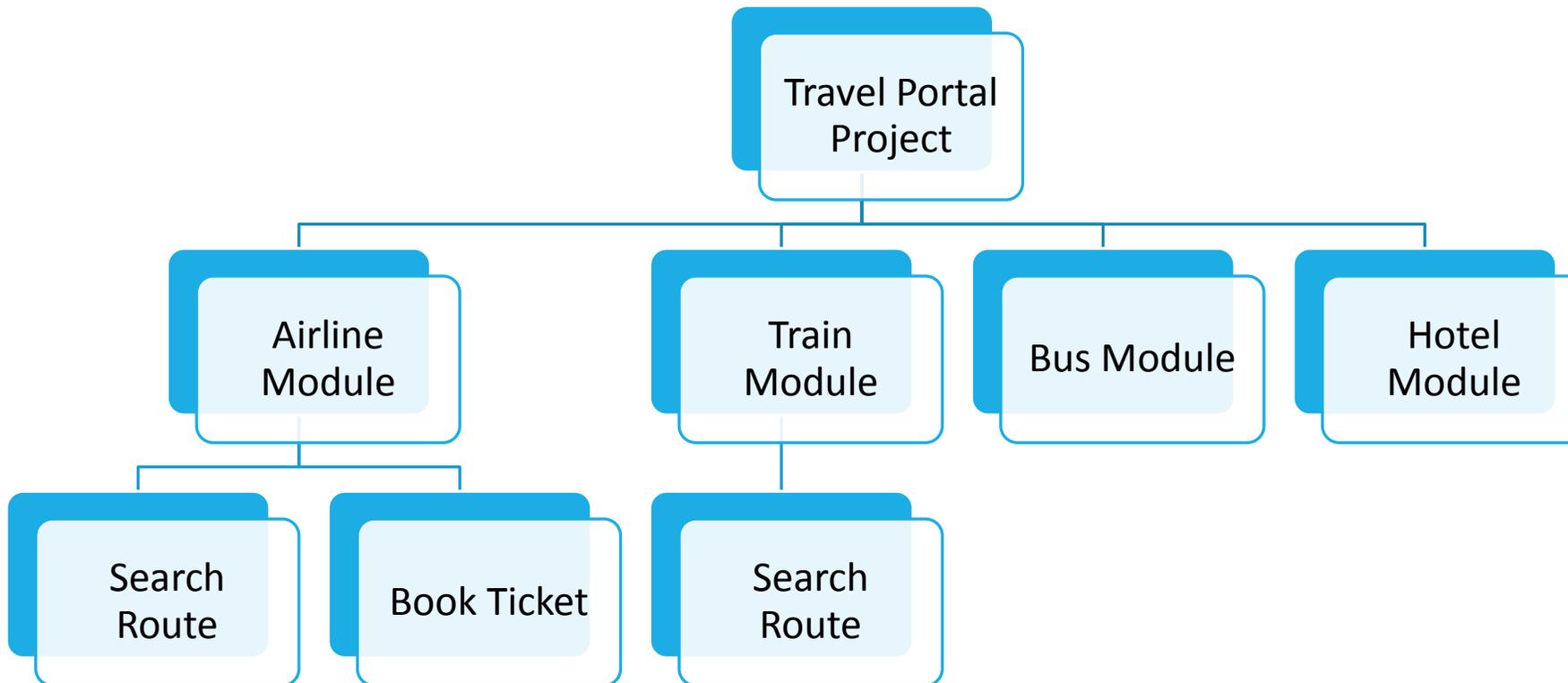
Create WBS

- After defining project scope, the project deliverables need to be broken down into smaller, more manageable components
- This is done by a technique called Decomposition which produces the Work Breakdown Structure [WBS]
- WBS is an hierarchical decomposition of the work to be carried out.
- The deliverables are identified at the lowest level of the WBS known as Work Packages
- Work Packages are further decomposed into activities that represent the work effort required to complete the work package
- WBS can be created based on the phases of the project or based on the major deliverables

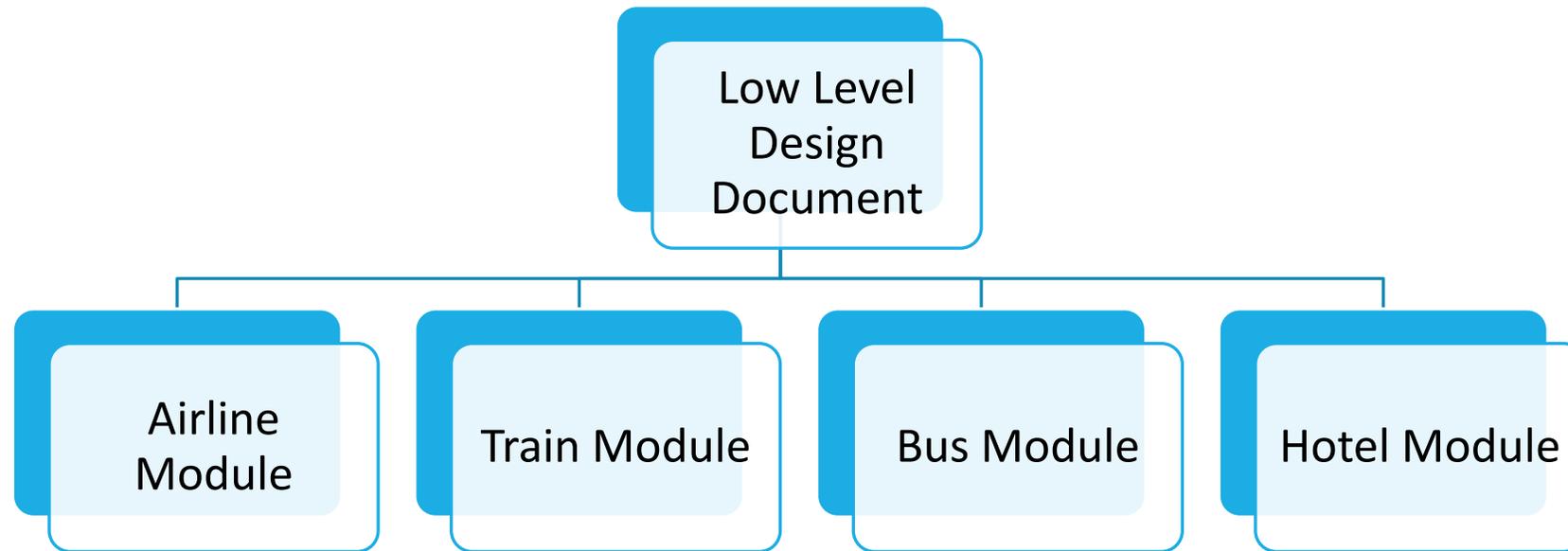
WBS – based on Phases of Project



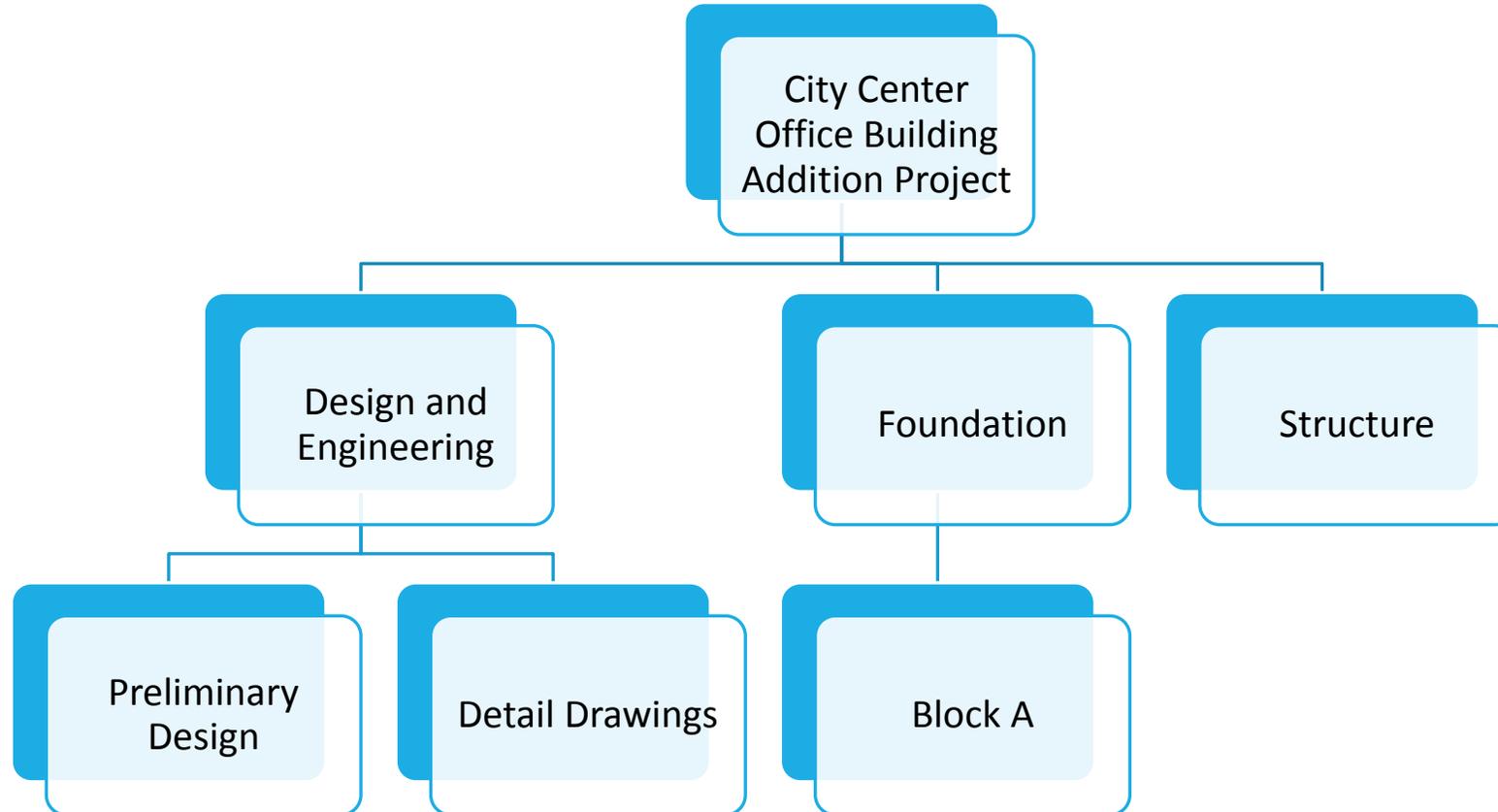
WBS – based on Major Deliverables



WBS – Combination of phases and deliverables



WBS for Construction Project



Exercise

For your current/previous Project :

- Create WBS based on phases of Project
 - i. Identify phases of Project
 - ii. Identify Work Packages for each phase
 - iii. Identify Activities for each Work Package

- Create WBS based on major deliverables of Project
 - i. Identify major deliverables of Project
 - ii. Identify Work Packages for each major deliverable
 - iii. Identify Activities for each Work Package

Principles of Estimation

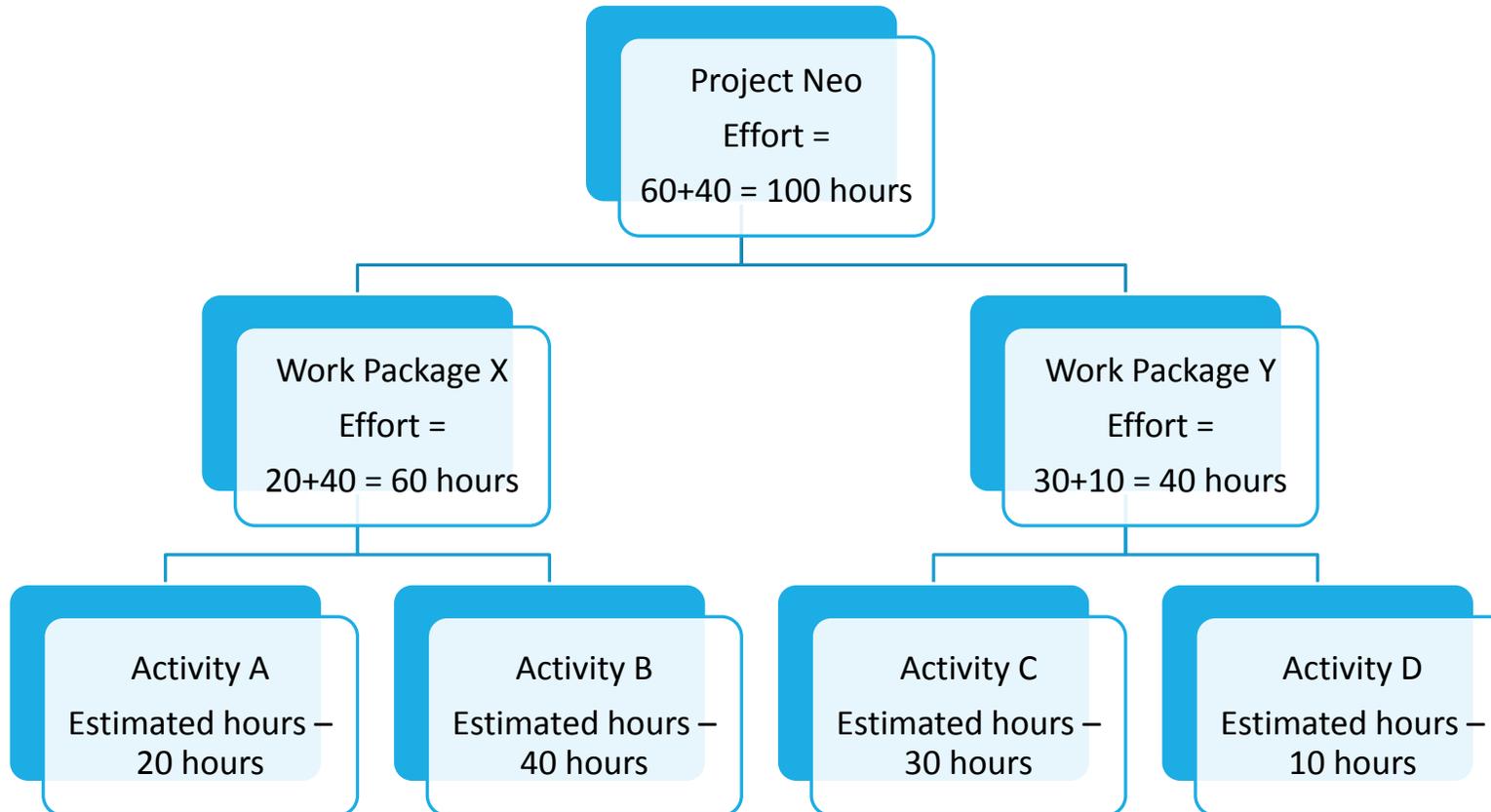
- Estimate is an FORECAST of the Effort or Duration or Cost of a Project
- It is usually expressed as a point estimate with an percentage range of variance
- Lower the variance more the accuracy of the Estimate
- Rarely Estimate can be given with 100% Accuracy
- Example:
 - i. Estimated Man-hours required to construct a house is 50000 hours +/- 20%
 - ii. Estimated Duration to complete construction of a house is 12 months +/- 10%
 - iii. Estimated Cost of constructing an house is 30 Lakhs +/- 15%
- To be able to Estimate Effort/Duration/Cost it is necessary to know the Size of the Project
- Size of Project is calculated based on Requirements
- Hence accuracy of Estimates depends on Clarity of Requirements

Bottom Up Estimation

Bottom Up Estimation:

- Can be used when requirements are well defined.
- WBS is prepared for all requirements and work packages identified.
- Activities for all work packages are identified.
- Estimation is done for each activity of a work package with the greatest level of specified detail and then aggregated.
- Other Estimation techniques can also be used to estimate at activity level.
- The estimate for a work package is the cumulative effort of all activities of that work package.
- The estimates of all work packages are then “rolled up” to derive estimates of different phases of project as well as overall project.
- This is called as 100% Rule. The estimate of a parent node is equal to cumulative estimates of its child nodes.
- This technique is time consuming and costly. But also more accurate than other techniques.

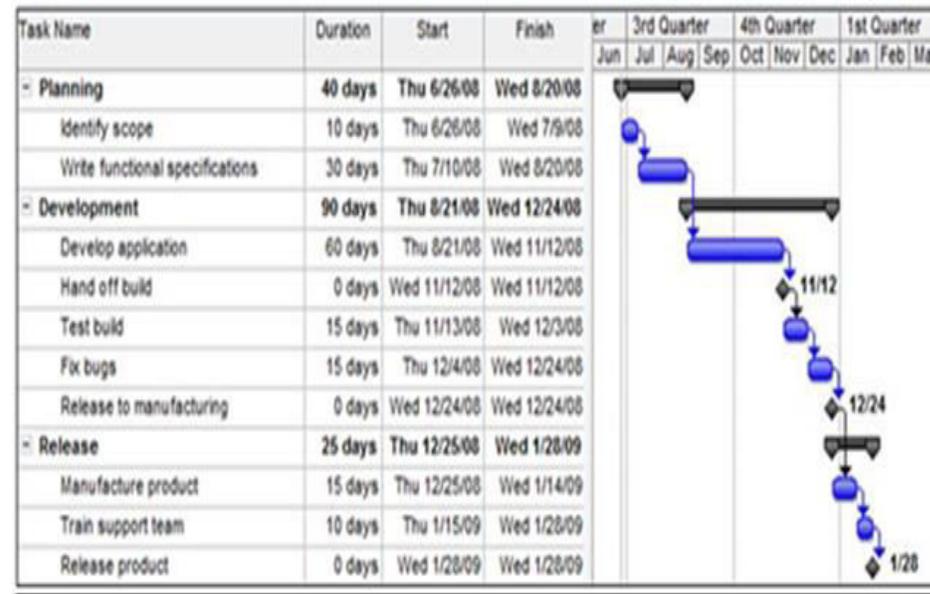
Bottom Up Estimation - Example



Understanding a Schedule

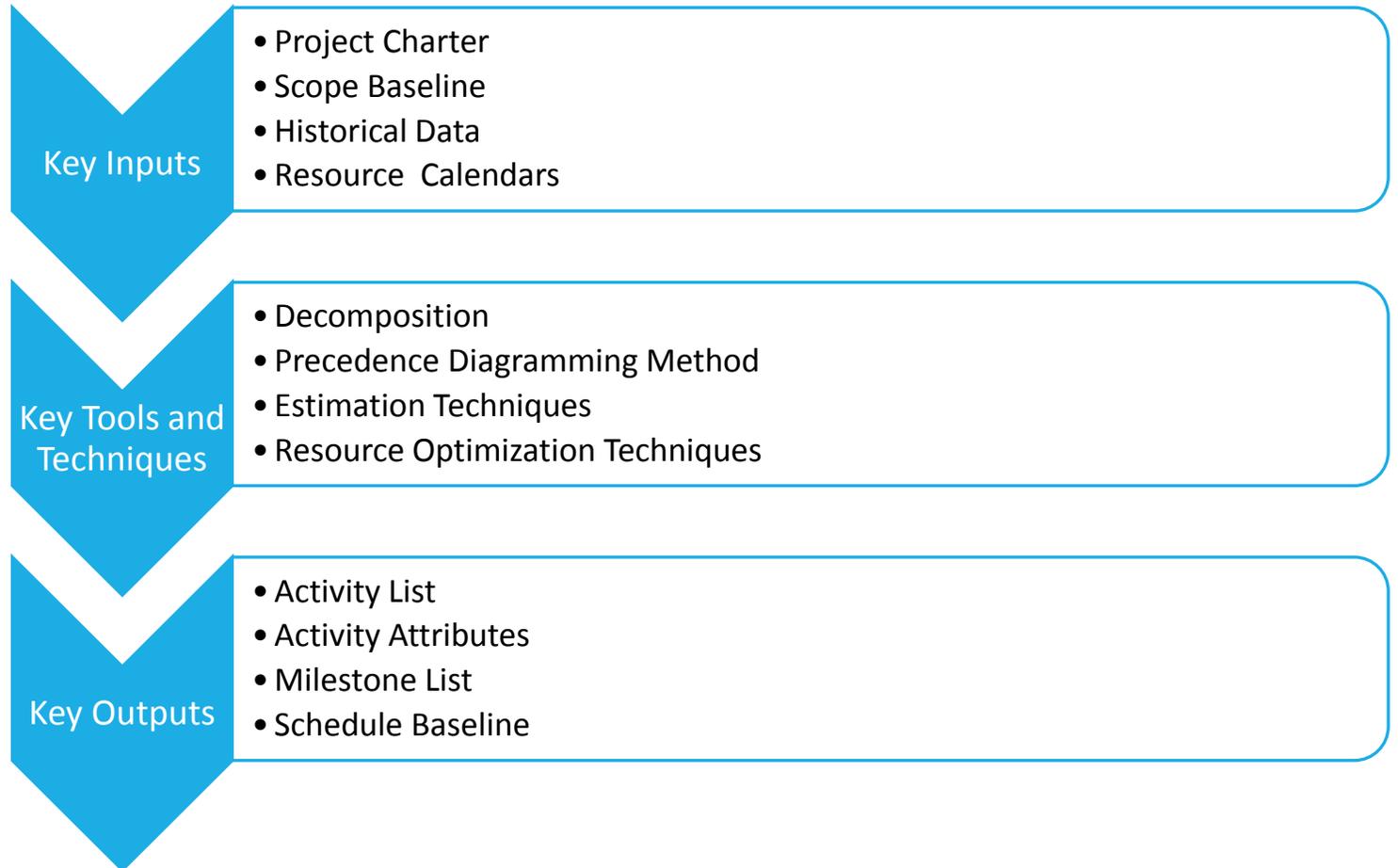
A schedule or a timetable, as a basic time-management tool, consists of a list of times at which possible tasks, events, or actions are intended to take place, OR of a sequence of events in the chronological order in which such things are intended to take place. ~ Wikipedia

Date/Day	Match	Place	Day/Night
Feb 14 - Sat	New Zealand v Sri Lanka	Christchurch	Day
Feb 14 - Sat	Australia v England	Melbourne	Day/night
Feb 15 - Sun	South Africa v Zimbabwe	Hamilton	Day/night
Feb 15 - Sun	India v Pakistan	Adelaide	Day/night
Feb 16 - Mon	Ireland v West Indies	Nelson	Day
Feb 17 - Tue	New Zealand v TBC	Dunedin	Day
Feb 18 - Wed	Bangladesh v Afghanistan	Canberra	Day/night
Feb 19 - Thu	Zimbabwe v TBC	Nelson	Day
Feb 20 - Fri	New Zealand v England	Wellington	Day/night
Feb 21 - Sat	Pakistan v West Indies	Christchurch	Day
Feb 21 - Sat	Australia v Bangladesh	Brisbane	Day/night
Feb 22 - Sun	Afghanistan v Sri Lanka	Dunedin	Day
Feb 22 - Sun	India v South Africa	Melbourne	Day/night
Feb 23 - Mon	England v TBC	Christchurch	Day
Feb 24 - Tue	West Indies v Zimbabwe	Canberra	Day/night
Feb 25 - Wed	Ireland v TBC	Brisbane	Day/night
Feb 26 - Thu	Afghanistan v TBC	Dunedin	Day



What is Scheduling ?

Scheduling is the process of arriving at a schedule using appropriate tools and techniques given certain inputs



Examples of Schedules

School Time Table

Airport/Railways/Bus Schedules

Cricket Match Schedules

Anything else you can think of ?

How important is scheduling in above examples?

As you can see Scheduling as a concept is used widely and is not specific to only Project Management

In PMBOK Scheduling is part of Time Management process group which has the highest number of processes defined among all Knowledge groups [7]

Define Activities

- The WBS work packages are further broken down into ACTIVITIES or TASKS.
- This results in what is called as an Activity List.
- Activity List includes all the activities that are required for the project and described in sufficient detail so that others can understand.
- Example: Activity List for Work Package “High Level Design Document”

Activity ID	Activity Name
1.2.1.1	Get Inputs for High Level Design Document
1.2.1.2	Prepare High Level Design Document
1.2.1.3	Review High Level Design Document
1.2.1.4	Rework High Level Design Document
1.2.1.5	Obtain Sign Off from Customer

Define Activities

Activity List for Work Packages under “Low Level Design Document”

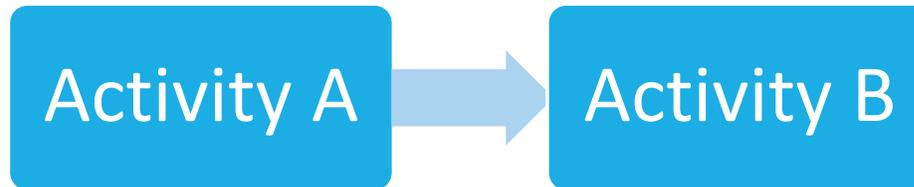
Module	Activity ID	Activity Name
Airline Module	1.2.2.1.1	Prepare Low Level Design Document
	1.2.2.1.2	Review Low Level Design Document
	1.2.2.1.3	Rework Low Level Design Document
Train Module	1.2.2.2.1	Prepare Low Level Design Document
	1.2.2.2.2	Review Low Level Design Document
	1.2.2.2.3	Rework Low Level Design Document
.....		
	1.2.2.5	Consolidate all LLD's
	1.2.2.6	Obtain Sign Off from Customer

Sequence Activities

- Identify and document relationships among project activities.
- Tasks have an inherent dependency with few other tasks.
- For example testing activity depends on coding activity to have already been performed. Hence we can say that PREDECESSOR of testing activity is coding activity. These type of tasks need to be done in sequence.
- Few tasks do not have dependency on each other. For example coding for different modules A and B can be independent of each other. Such tasks can be done in parallel.
- Identifying tasks which have the potential to be done in parallel is an important aspect of scheduling.

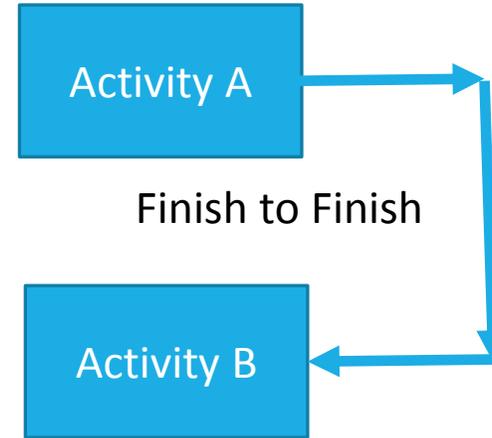
Precedence Diagramming Method

- Relationships among activities are shown using Precedence Diagramming Method [PDM].
- In this method all activities are shown in boxes/nodes. The nodes are connected with arrows that indicate the type of relationship.
- Example:

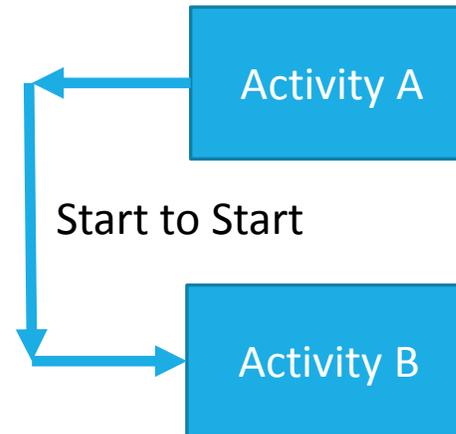


- Here Activity A is PREDECESSOR to Activity B.
- This is an example of Finish to Start Relationship since only on completion of Activity A can Activity B be started.

Types of Relationships



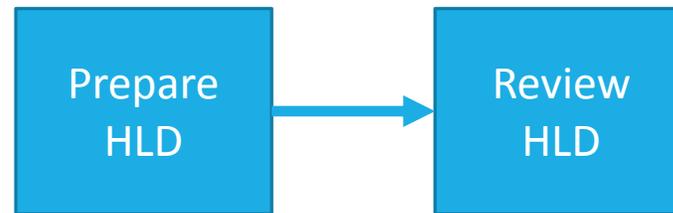
PDM can show four types of relationships :



Types of Dependencies

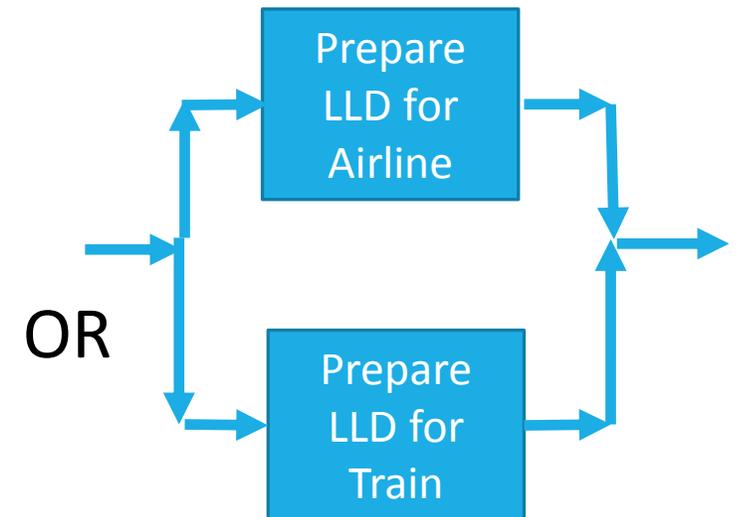
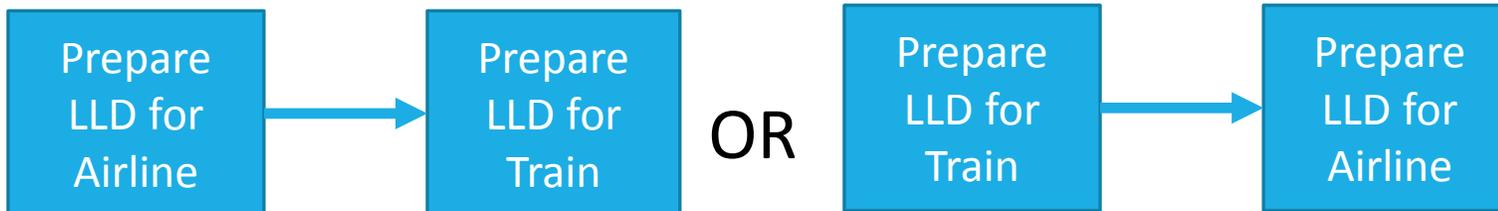
Mandatory Dependencies :

These are inherent in the nature of work or obligated by contract.



Discretionary Dependencies :

These are applied as industry practice or is desired in the project

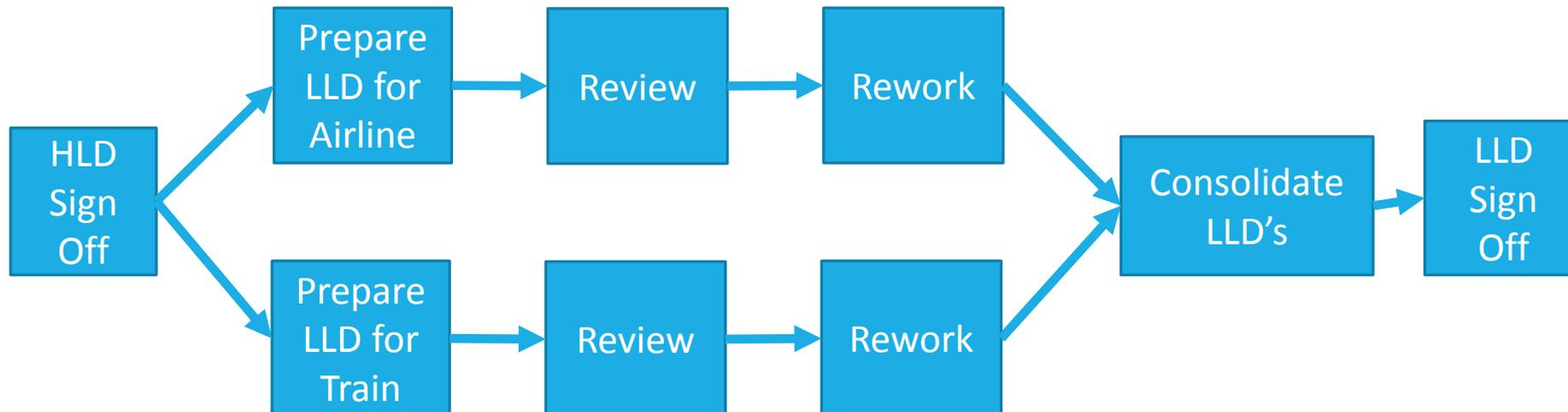


Task Network Diagram

Sequencing activities for Work Package “High Level Design Document”



Sequencing activities for Work Packages for “Low Level Design Document”



Activity Duration

- Number of work periods needed to complete the activity.
- Duration of an activity is calculated using the Task Rule which is as follows :
$$\text{Work} = \text{Duration} * \text{Resource Units}$$
 - i. Work is the Effort estimated for the activity. Various Estimation techniques discussed previously can be used. This is usually expressed in hours.
 - ii. Resource Units equals the number of resources that are assigned to the activity and the number of hours per day they are available for this activity.
 - iii. Duration calculated from above Rule is usually expressed in days.
- Example :

An High Level Design Document is required to be prepared. It's estimated effort is 40 hours. Two resources are assigned to it. Both of them can spare 4 hours each daily for this activity. What is the Duration of this Activity ?

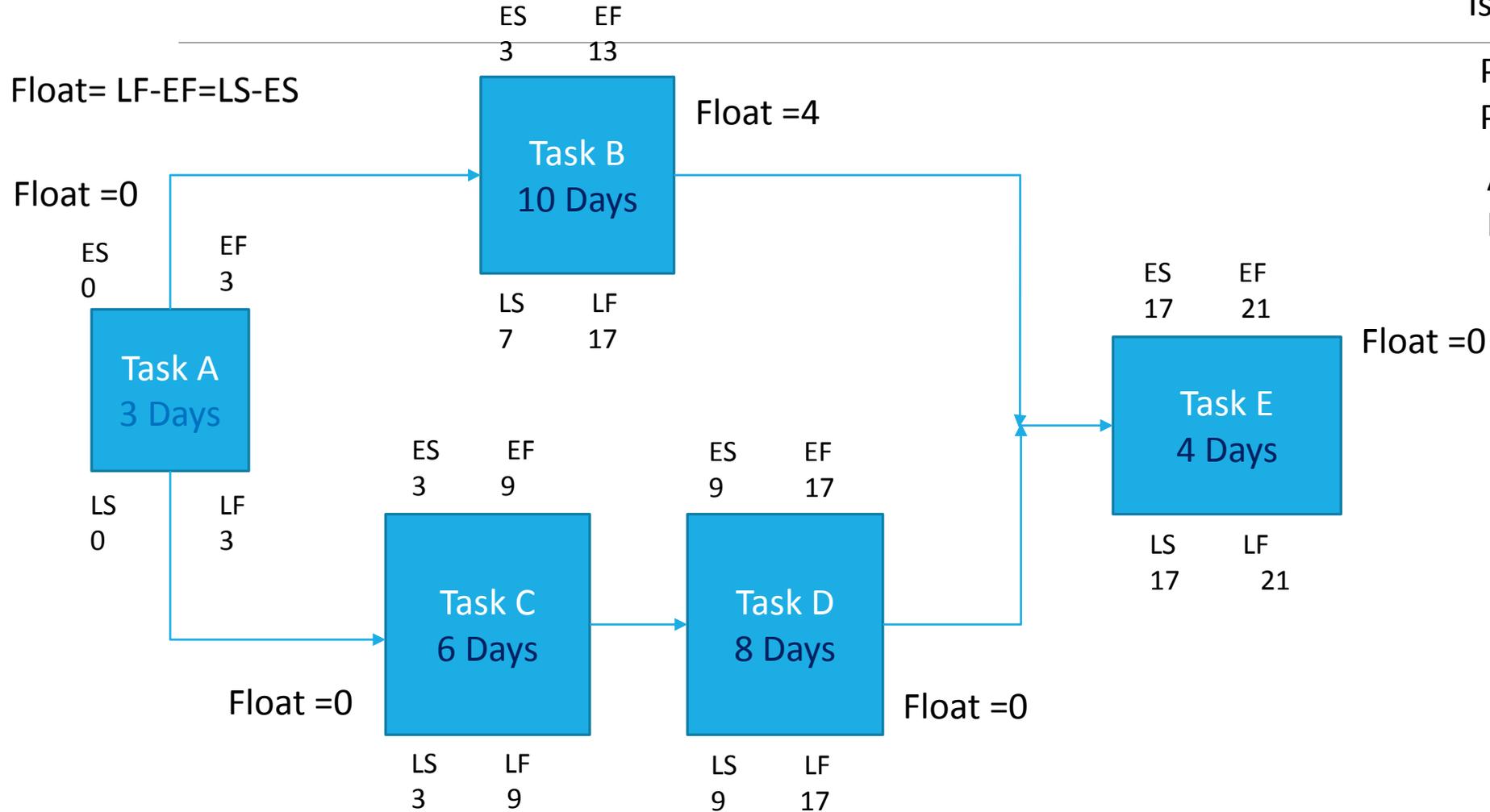
Duration of activity is 5 days.

Critical Path Method [CPM]

This method involves the following steps :

- Calculate the Duration for all activities on the Task Network Diagram.
- Calculate the early start [ES], early finish [EF], late start [LS] and late finish [LF] for all activities by using Forward pass and Backward pass techniques.
- Identify number of paths on the Network Diagram.
- Calculate the total duration of each path.
- Identify path with longest duration. This path is called Critical Path.
- The Critical Path Duration will be the MINIMUM Project Duration.
- Calculate Total Float for all activities with the formula [LS-ES] or [LF-EF].
- Total Float is the amount of time an activity can be delayed without delaying the project finish date. Float is also called as Slack.
- Identify Activities on Critical Path. These will have zero float which means they HAVE to start and finish on time.

Illustration



Customer wants Project to Be completed in 25 days.
Is this feasible?

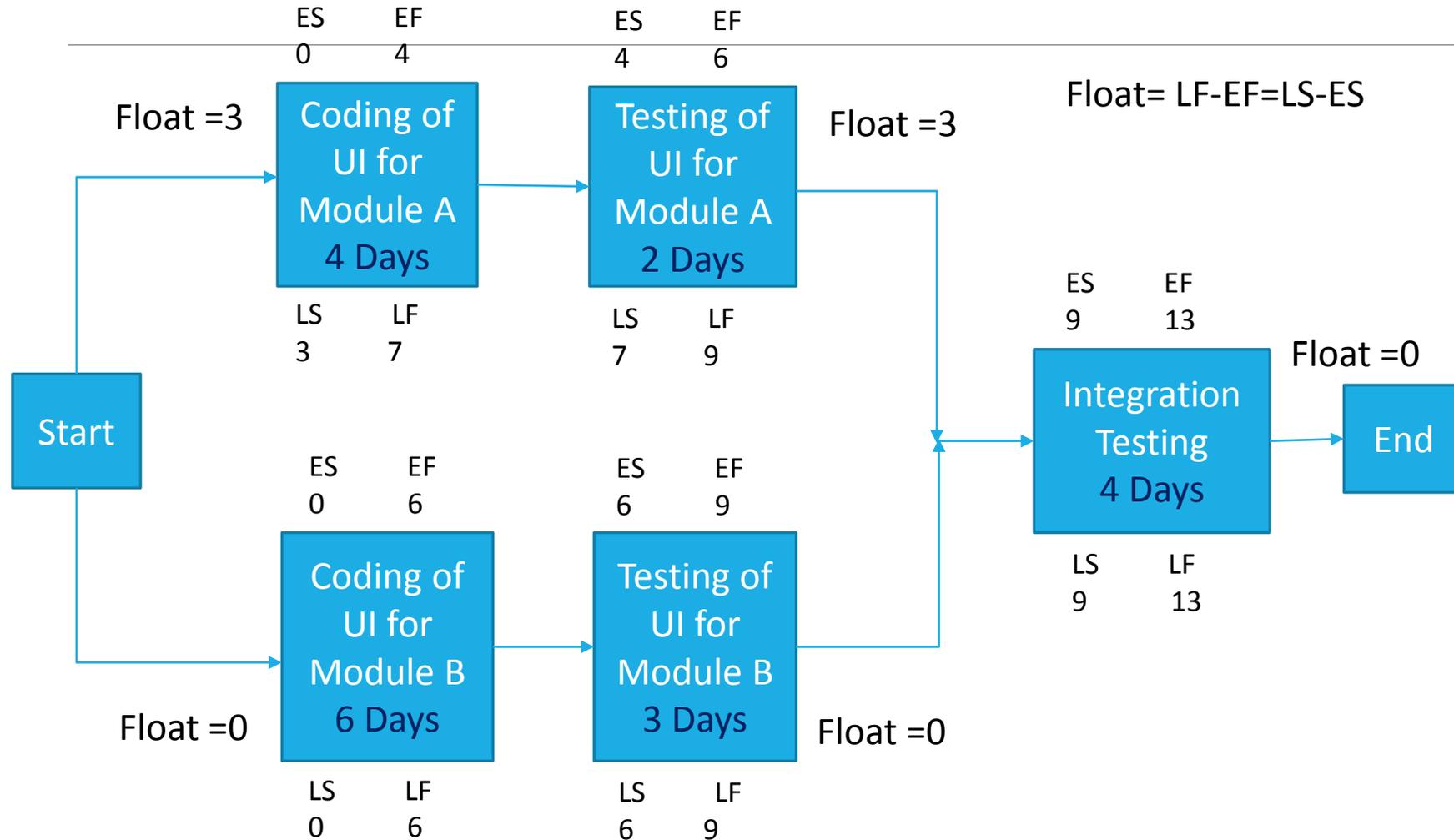
Path ABE = 17 days

Path ACDE = 21 days

ACDE is Critical Path.

Project Duration is 21 days

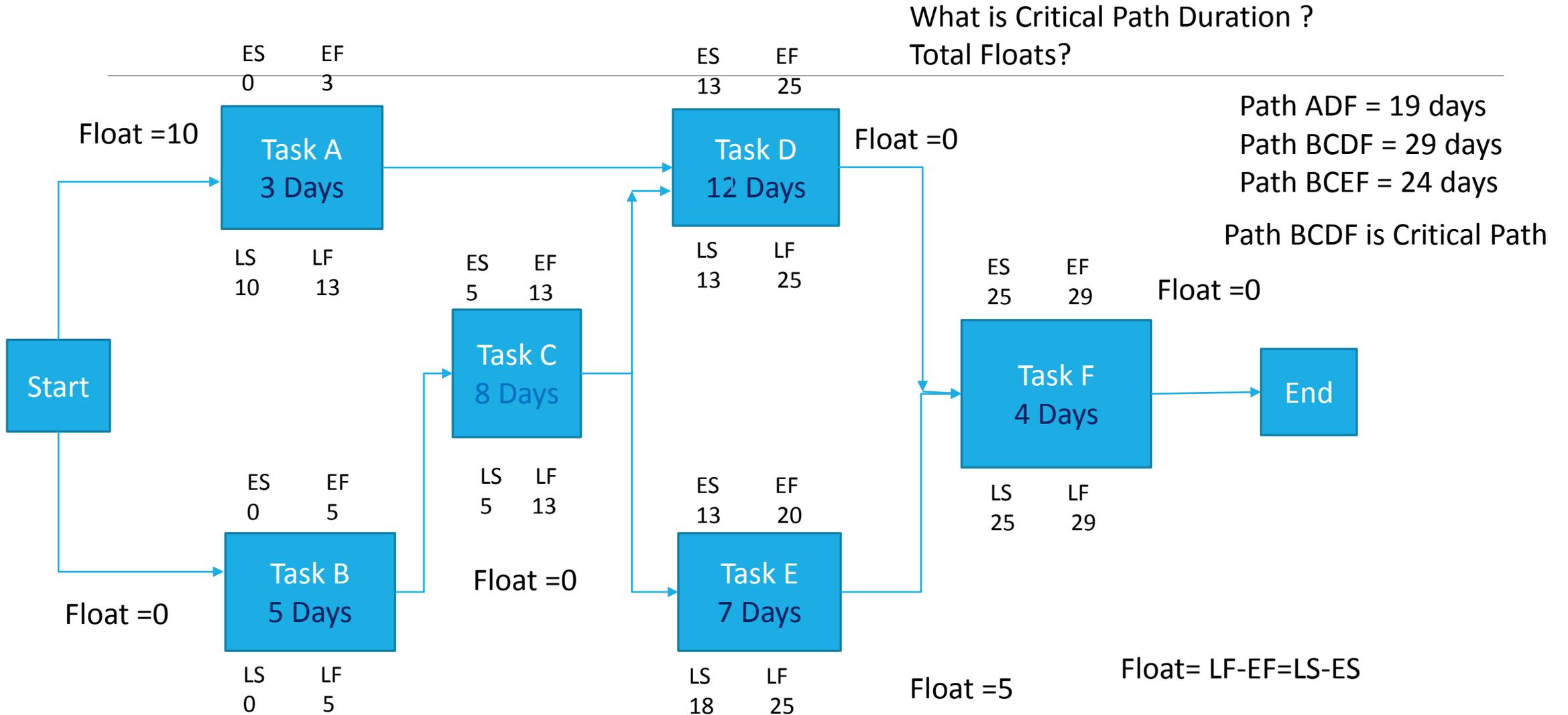
Exercise



$$\text{Float} = \text{LF} - \text{EF} = \text{LS} - \text{ES}$$

Critical Path?
Project Duration?
Total Floats?

Exercise



Layout

Open a new Microsoft Project Document

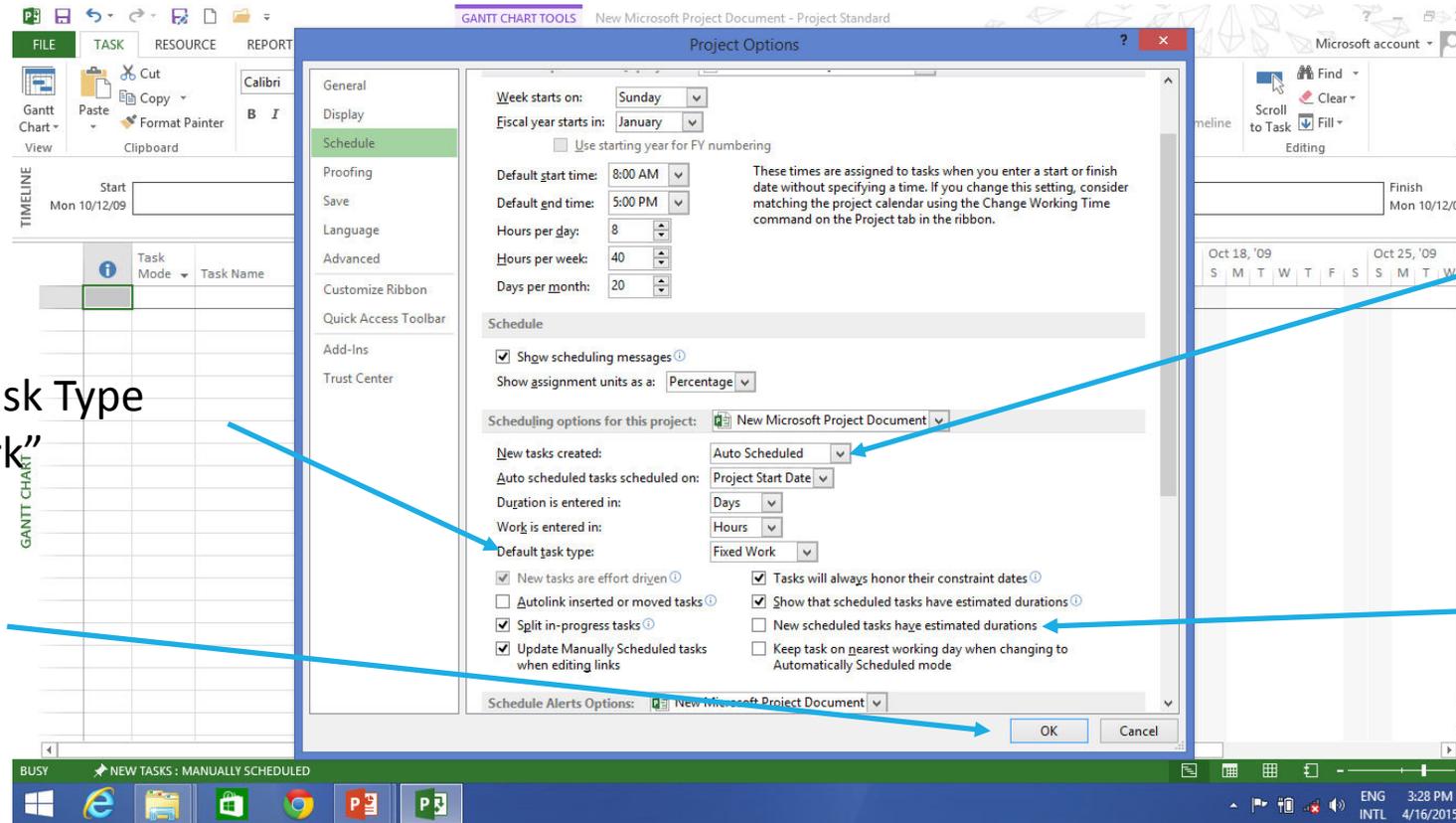
The screenshot shows the Microsoft Project software interface. The ribbon at the top includes FILE, TASK, RESOURCE, REPORT, PROJECT, VIEW, and FORMAT. The Gantt Chart Tools ribbon is also visible. The main workspace is divided into a Gantt Chart area on the left and a Timeline area on the right. The Gantt Chart area contains a table with columns for Task Mode, Task Name, Duration, Start, Finish, Predecessors, and Resource Names. The Timeline area shows a calendar view with dates from Oct 11, '09 to Oct 25, '09. The status bar at the bottom indicates 'NEW TASKS: MANUALLY SCHEDULED' and the system tray shows the date and time as 3:04 PM on 4/16/2015.

Annotations with blue arrows point to the following elements:

- Toolbar**: Points to the top-left corner of the application window.
- Views**: Points to the 'Gantt Chart' button in the ribbon.
- Ribbon Tabs**: Points to the 'FORMAT' ribbon tab.
- Timeline**: Points to the top bar of the timeline area.
- Columns**: Points to the table header in the Gantt Chart area.
- Gantt Chart**: Points to the Gantt chart bars in the main workspace.

Setup - Options

Go to File -> Options -> Schedule



Set Default Task Type as "Fixed Work"

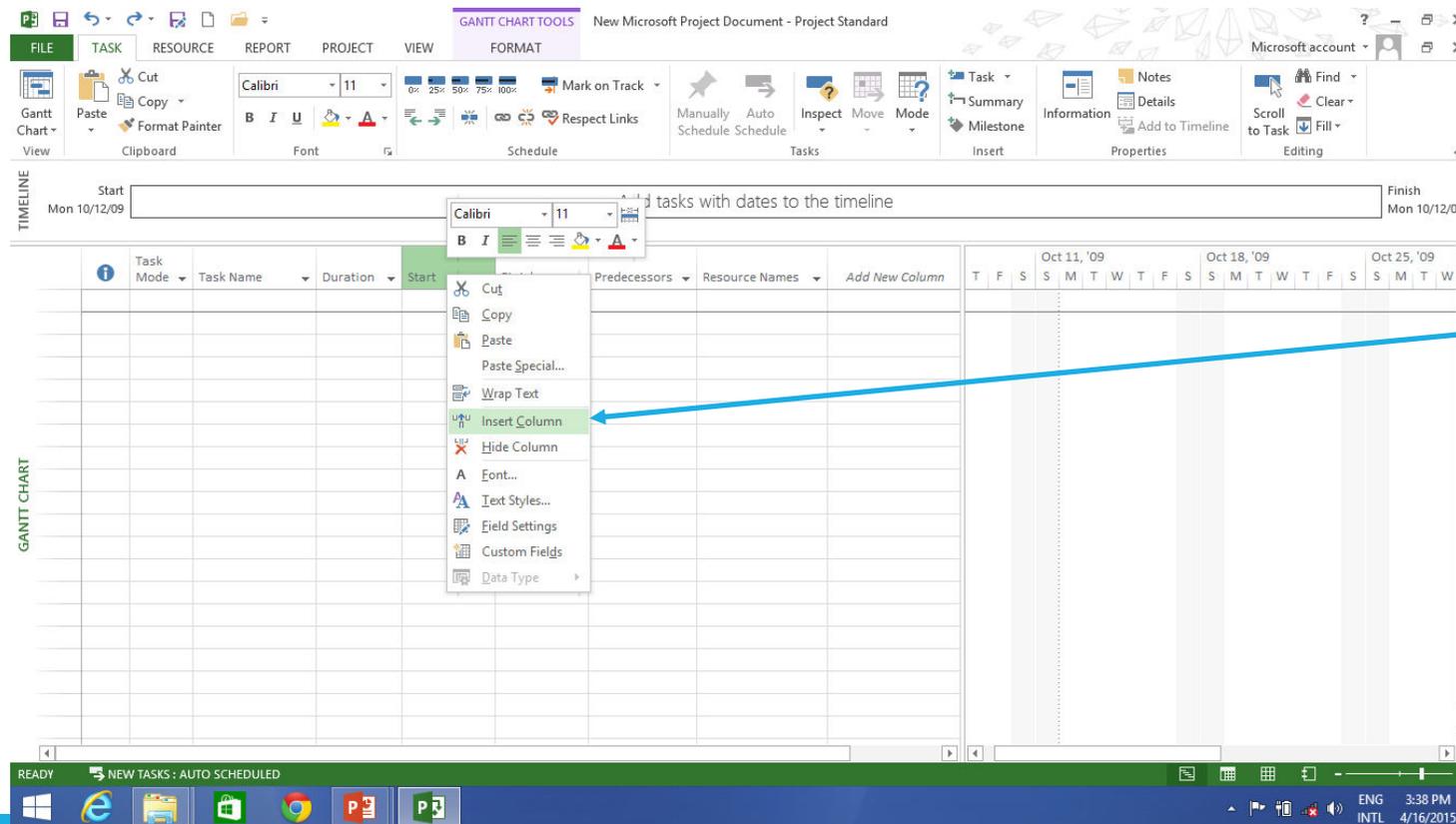
Click on OK

Set "New Tasks Created" as "Auto Scheduled"

Uncheck the check box "New scheduled tasks have estimated durations"

Setup - Work Column

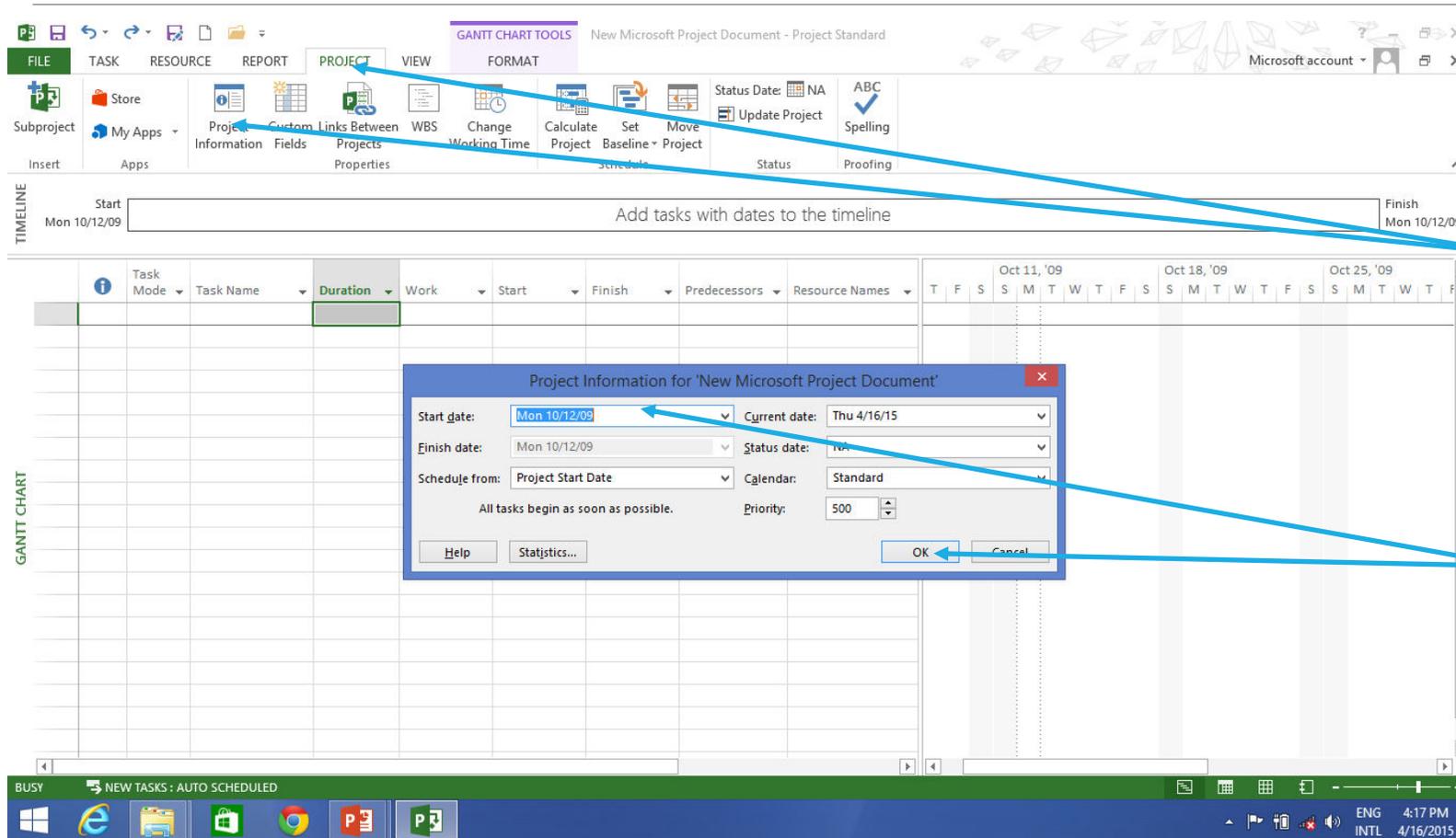
In the Gantt Chart view



Right click on Start column and select Insert Column. Type Work.

Setup - Project Information

In the Gantt Chart view

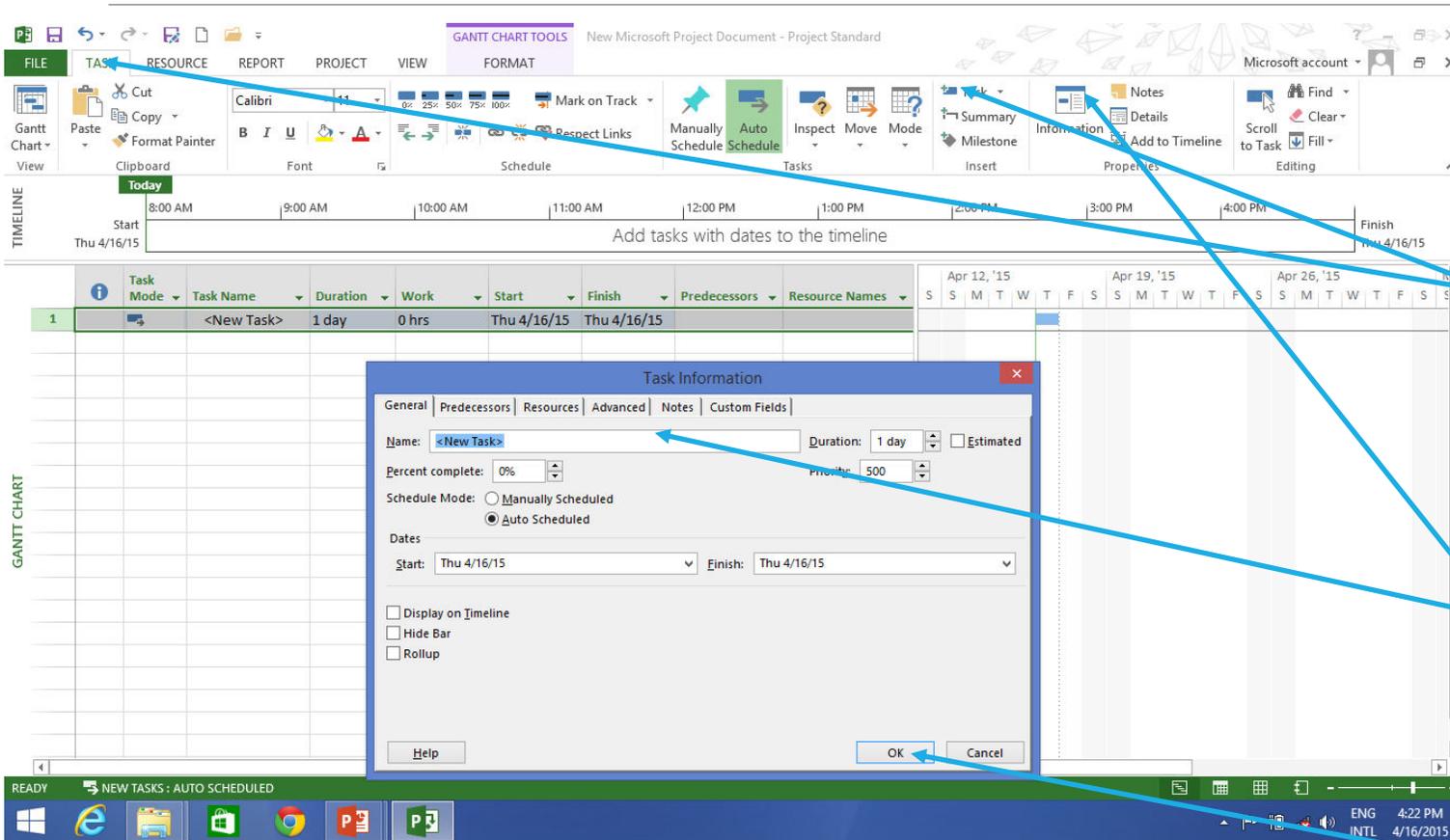


Click on Project Tab
and then Project Information

Set Start Date and click OK

Entering Task

In the Gantt Chart view



Click on Task Tab
and then Insert Task

Click on Information.
On Task Information window
enter Task Name

Click on OK

Task Duration Calculation

In the Gantt Chart view

The screenshot displays the Microsoft Project interface in Gantt Chart view. The ribbon includes FILE, TASK, RESOURCE, REPORT, PROJECT, VIEW, and FORMAT. The Gantt chart shows a task bar for 'Task Name 1' starting on Thursday, 4/16/15, and ending on Wednesday, 4/22/15. The task table below shows the following data:

Task ID	Task Name	Duration	Work	Start	Finish	Predecessors	Resource Names
1	Task Name 1	5 days	40 hrs	Thu 4/16/15	Wed 4/22/15		Resource1

Two blue arrows originate from the 'Duration' and 'Work' columns of the task table and point to the corresponding task bar in the Gantt chart, illustrating the calculation process.

Provide Work and Resource Name

Task Duration is calculated

Task Rule

In the Auto Scheduled mode Microsoft Project follows task rule which is defined below :

$$\text{Work} = \text{Duration} * \text{Resource Units} \quad [1 \text{ Resource unit} = 8 \text{ hours}]$$

- When two of the above three variables are provided to the tool, it will calculate the third variable using the task rule.
- If Task Type “Fixed Work” is used the user has to provide Work and Resource details and the tool calculates Duration.
- If Task Type “Fixed Duration” is used the user has to provide Duration and Resource details and the tool calculates Work.
- If Task Type “Fixed Units” is used the user has to provide Resource details and either Work or Duration. The tool calculates the third variable.
- In all the above cases whatever variable is “Fixed” will not be modified by the tool.

Summary Task and Milestone Task

In the Gantt Chart view

Click on Task
And Summary
Summary Task is
created
With sub task

Task ID	Task Name	Work	Duration	Start	Finish	Predecessor	Resource Names
1	New Summary Task	0 hrs	1 day	Wed 4/22/15	Wed 4/22/15		
2	<New Task>	0 hrs	1 day	Wed 4/22/15	Wed 4/22/15		
3	<New Task>	0 hrs	1 day	Wed 4/22/15	Wed 4/22/15		
4	<New Task>	0 hrs	0 days	Wed 4/22/15	Wed 4/22/15		

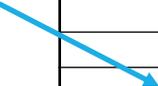
Click on Milestone
Task and Milestone
Is created

Creating Tasks in WBS Format – Exercise

Create a Schedule for the following list of activities:

Activity ID	Activity Name	Effort [Hrs]
1	Travel Portal Project	
1.2	Design	
1.2.1	High Level Design Document	
1.2.1.1	Get Inputs for High Level Design Document	16
1.2.1.2	Prepare High Level Design Document	40
1.2.1.3	Review High Level Design Document	8
1.2.1.4	Rework High Level Design Document	8
1.2.1.5	Obtain Sign Off from Customer	8
1.2.2	Low Level Design Document	
1.2.2.1	Airline Module	
1.2.2.1.1	Prepare Low Level Design Document	24
1.2.2.1.2	Review Low Level Design Document	8
1.2.2.1.3	Rework Low Level Design Document	8
1.2.2.2	Train Module	
1.2.2.2.1	Prepare Low Level Design Document	24
1.2.2.2.2	Review Low Level Design Document	8
1.2.2.2.3	Rework Low Level Design Document	8
1.2.2.5	Consolidate all LLD's	16
1.2.2.6	Obtain Sign Off from Customer	16

Activity Id indicates WBS Level

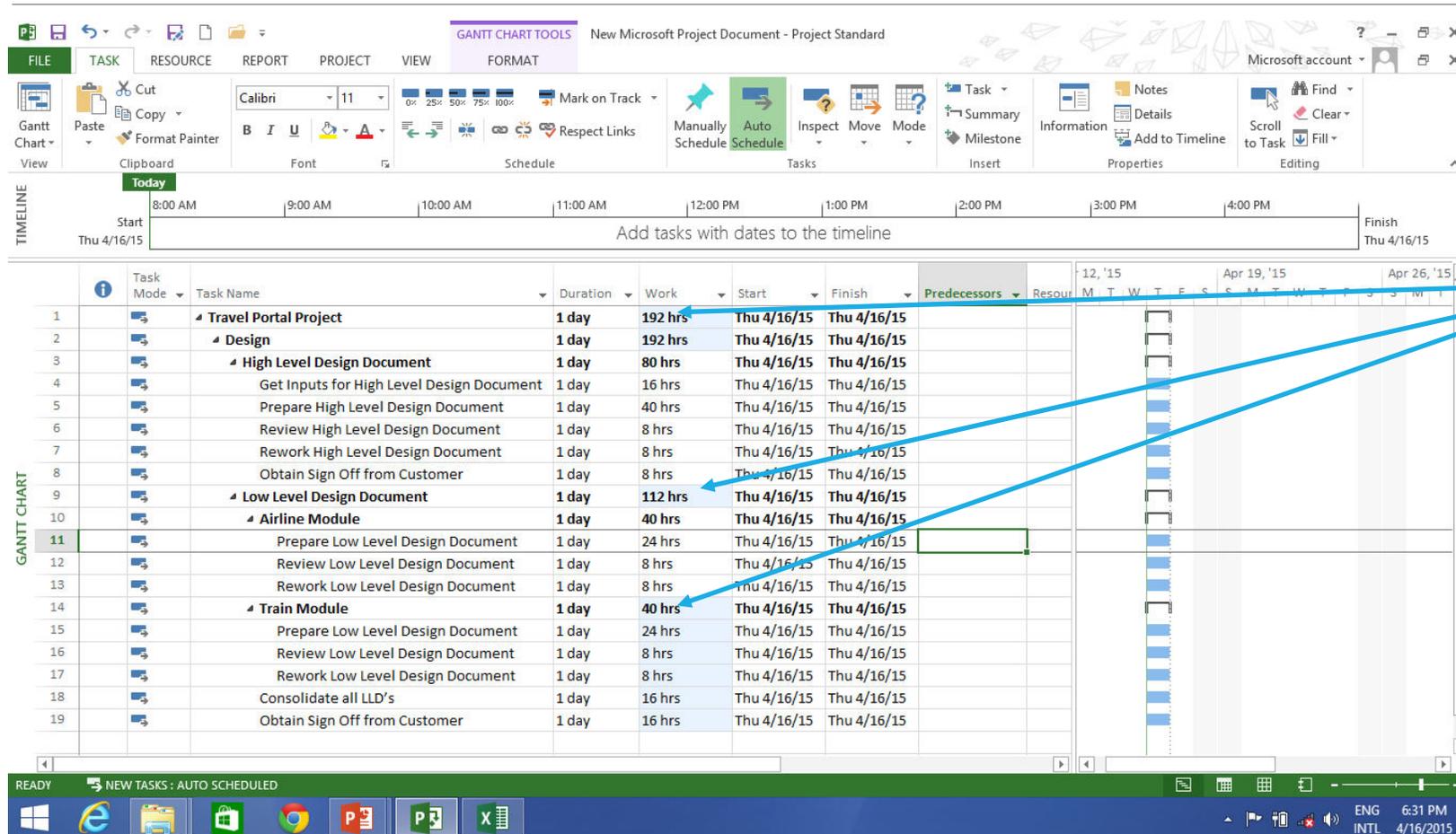


Effort required for only last level of WBS



WBS for Travel Portal Project

In the Gantt Chart view



Effort Estimate
Rolls up to
Summary levels

Task Relationships

In the Gantt Chart view

Link the Selected Tasks (Ctrl+F2)
You can link tasks so one can't start until the other has finished.
You can also link tasks in other ways, such as a Start-to-Start link when two tasks need to start at the same time.

Task ID	Task Name	Duration	Hours	Start	Finish	Predecessors	Resource Names
1	Travel Portal Project			Thu 4/16/15	Wed 4/22/15		
2	Design	5 days	192 hrs	Thu 4/16/15	Wed 4/22/15		
3	High Level Design Document	5 days	80 hrs	Thu 4/16/15	Wed 4/22/15		
4	Get Inputs for High Level Design Document	1 day	16 hrs	Thu 4/16/15	Thu 4/16/15		
5	Prepare High Level Design Document	1 day	40 hrs	Fri 4/17/15	Fri 4/17/15	4	
6	Review High Level Design Document	1 day	8 hrs	Mon 4/20/15	Mon 4/20/15	5	
7	Rework High Level Design Document	1 day	8 hrs	Tue 4/21/15	Tue 4/21/15	6	
8	Obtain Sign Off from Customer	1 day	8 hrs	Wed 4/22/15	Wed 4/22/15	7	
9	Low Level Design Document	1 day	112 hrs	Thu 4/16/15	Thu 4/16/15		
10	Airline Module	1 day	40 hrs	Thu 4/16/15	Thu 4/16/15		
11	Prepare Low Level Design Document	1 day	24 hrs	Thu 4/16/15	Thu 4/16/15		
12	Review Low Level Design Document	1 day	8 hrs	Thu 4/16/15	Thu 4/16/15		
13	Rework Low Level Design Document	1 day	8 hrs	Thu 4/16/15	Thu 4/16/15		
14	Train Module	1 day	40 hrs	Thu 4/16/15	Thu 4/16/15		
15	Prepare Low Level Design Document	1 day	24 hrs	Thu 4/16/15	Thu 4/16/15		
16	Review Low Level Design Document	1 day	8 hrs	Thu 4/16/15	Thu 4/16/15		
17	Rework Low Level Design Document	1 day	8 hrs	Thu 4/16/15	Thu 4/16/15		
18	Consolidate all LLD's	1 day	16 hrs	Thu 4/16/15	Thu 4/16/15		
19	Obtain Sign Off from Customer	1 day	16 hrs	Thu 4/16/15	Thu 4/16/15		

Select all the Activities for a Work Package and Link the selected tasks

Task Relationships

In the Gantt Chart view

The screenshot shows the Microsoft Project interface in Gantt Chart view. A 'Task Dependency' dialog box is open, showing the relationship between 'Prepare High Level Design Document' (Task 5) and 'Review High Level Design Document' (Task 6). The relationship type is 'Finish-to-Start (FS)' with a lag of 0 days. The Gantt chart below shows a project schedule from Thursday, 4/16/15 to Wednesday, 4/29/15. Tasks are listed in a table with columns for Task ID, Task Name, Duration, and Dates.

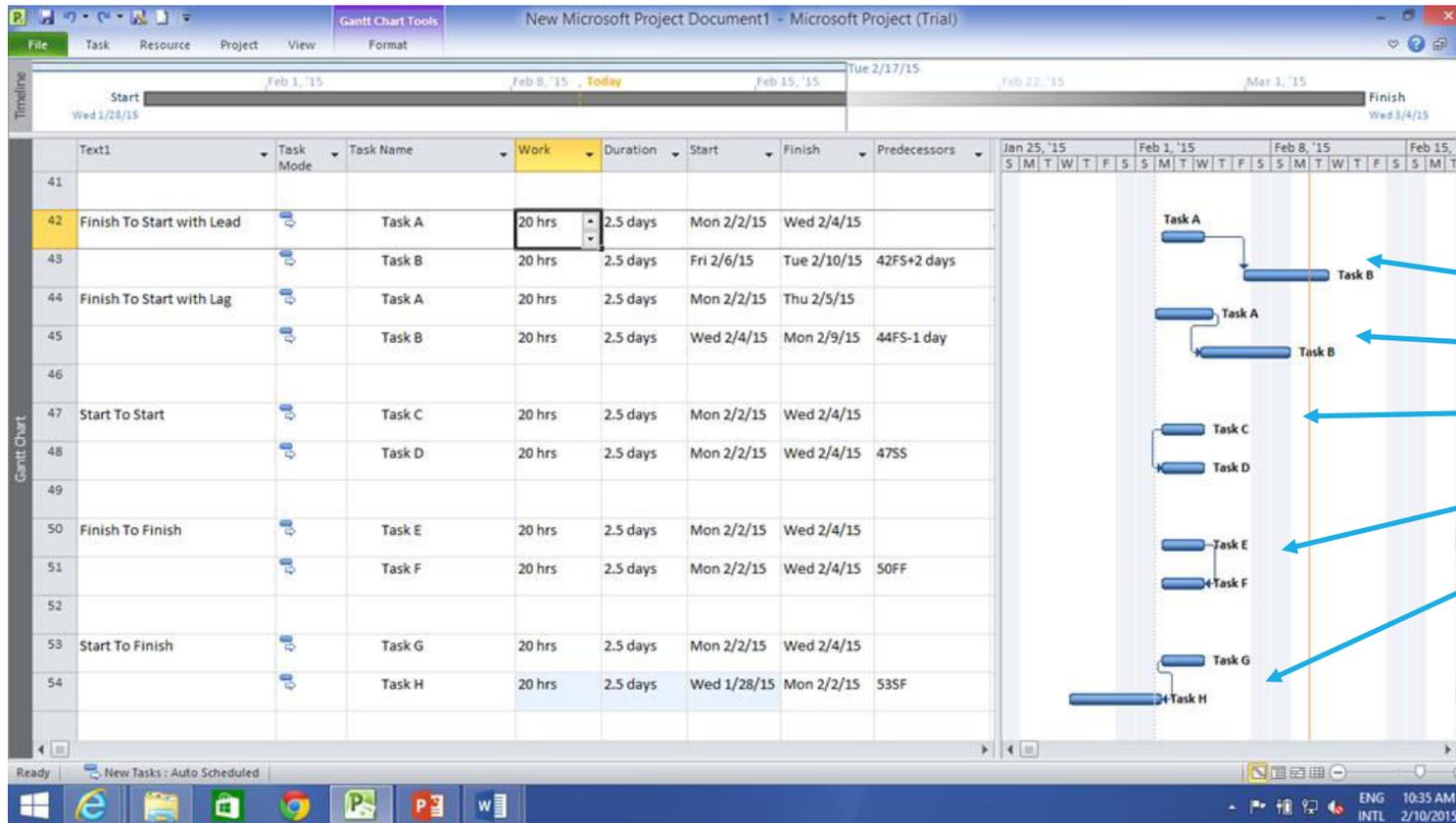
Task ID	Task Name	Duration	Start Date	Finish Date
1	Travel Portal Project		Thu 4/16/15	Wed 4/29/15
2	Design			
3	High Level Design Document			
4	Get Inputs for High Level Design Document			
5	Prepare High Level Design Document		Fri 4/17/15	Fri 4/17/15
6	Review High Level Design Document		Mon 4/20/15	Mon 4/20/15
7	Rework High Level Design Document	1 day 8 hrs	Tue 4/21/15	Tue 4/21/15
8	Obtain Sign Off from Customer	1 day 8 hrs	Wed 4/22/15	Wed 4/22/15
9	Low Level Design Document	5 days 112 hrs	Thu 4/23/15	Wed 4/29/15
10	Airline Module	3 days 40 hrs	Thu 4/23/15	Mon 4/27/15
11	Prepare Low Level Design Document	1 day 24 hrs	Thu 4/23/15	Thu 4/23/15
12	Review Low Level Design Document	1 day 8 hrs	Fri 4/24/15	Fri 4/24/15
13	Rework Low Level Design Document	1 day 8 hrs	Mon 4/27/15	Mon 4/27/15
14	Train Module	3 days 40 hrs	Thu 4/23/15	Mon 4/27/15
15	Prepare Low Level Design Document	1 day 24 hrs	Thu 4/23/15	Thu 4/23/15
16	Review Low Level Design Document	1 day 8 hrs	Fri 4/24/15	Fri 4/24/15
17	Rework Low Level Design Document	1 day 8 hrs	Mon 4/27/15	Mon 4/27/15
18	Consolidate all LLD's	1 day 16 hrs	Tue 4/28/15	Tue 4/28/15
19	Obtain Sign Off from Customer	1 day 16 hrs	Wed 4/29/15	Wed 4/29/15

Click on Task Link To view Task Dependency

Setting Parallel Path

Lag provides delay between tasks

Types of Task Links



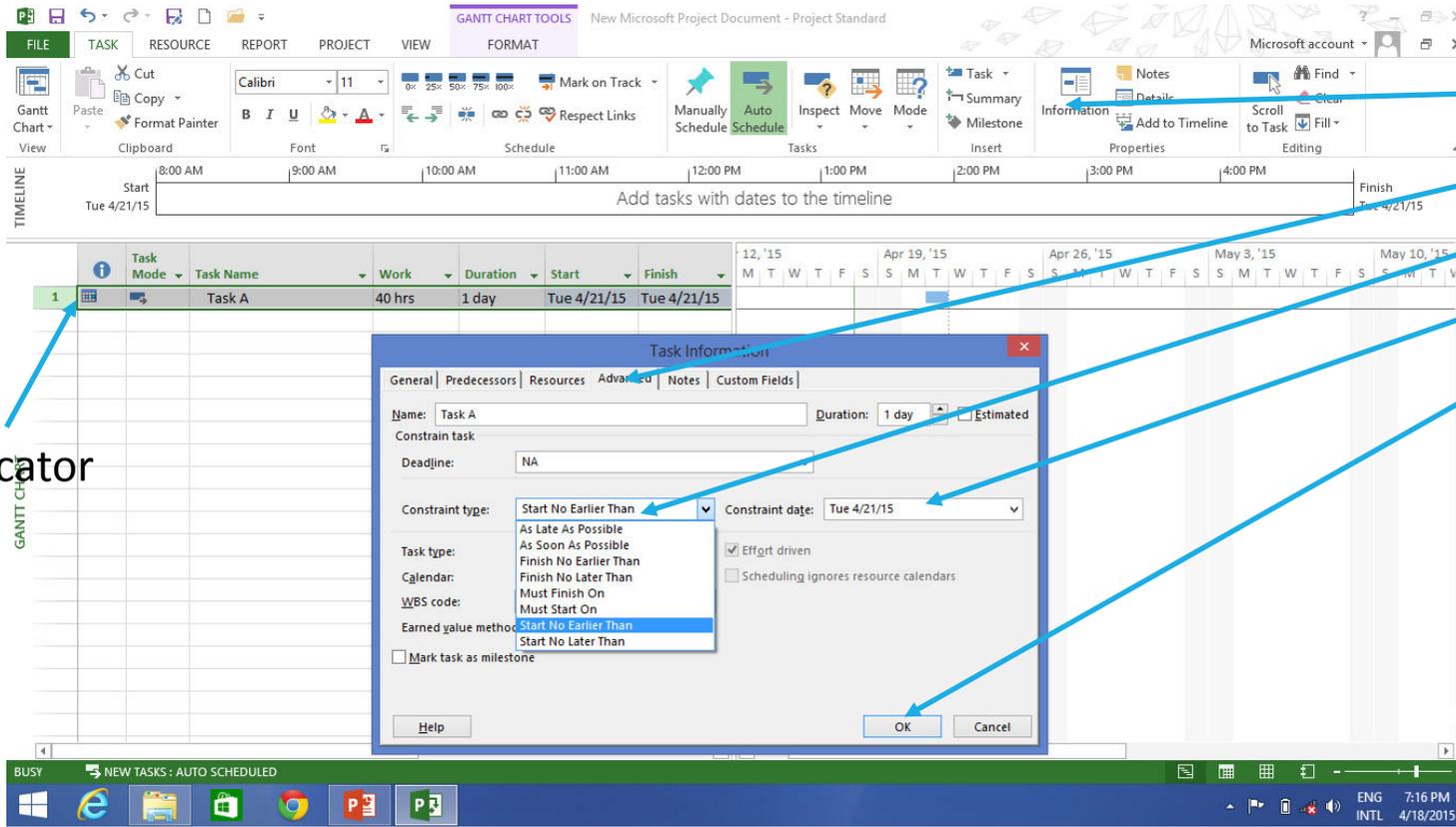
- Finish to Start with Lead
- Finish to Start with Lag
- Start to Start
- Finish to Finish
- Start to Finish

Constraints and Deadlines

- To keep a tighter control on when activities get executed.
- There are 8 constraints in total out of which 2 are flexible.
- The flexible constraints are “As soon as possible” and “As late as possible”. These are default constraints depending on whether forward or backward scheduling was selected under project information.
- The remaining 6 constraints are inflexible and are associated with a calendar date.
- Constraints override predecessor relationships. Even though the task link continue to be shown they are not maintained once constraints are set.
- They are recommended only in case of external dependencies which need to be tracked.
- Deadlines are better recommended for tracking customer drop dead dates.
- Deadlines do not override predecessor relationships.

Setting a Constraint

In the Gantt Chart view



Indicator

- Go to Task Information
- Select Advanced Tab
- Select Constraint type
- Select Constraint date
- Click OK

Setting a Deadline

In the Gantt Chart view

The screenshot shows the Microsoft Project interface in Gantt Chart view. The ribbon is set to 'FORMAT' with the 'GANTT CHART TOOLS' context menu open. The 'Advanced' tab is selected in the 'Task Information' dialog box. The 'Deadline' field is set to 'Tue 4/21/15'. A calendar pop-up is visible for April 2015. A white arrow points to the deadline date in the Gantt chart, and a red diamond warning icon is shown next to Task B. The 'OK' button in the dialog box is highlighted.

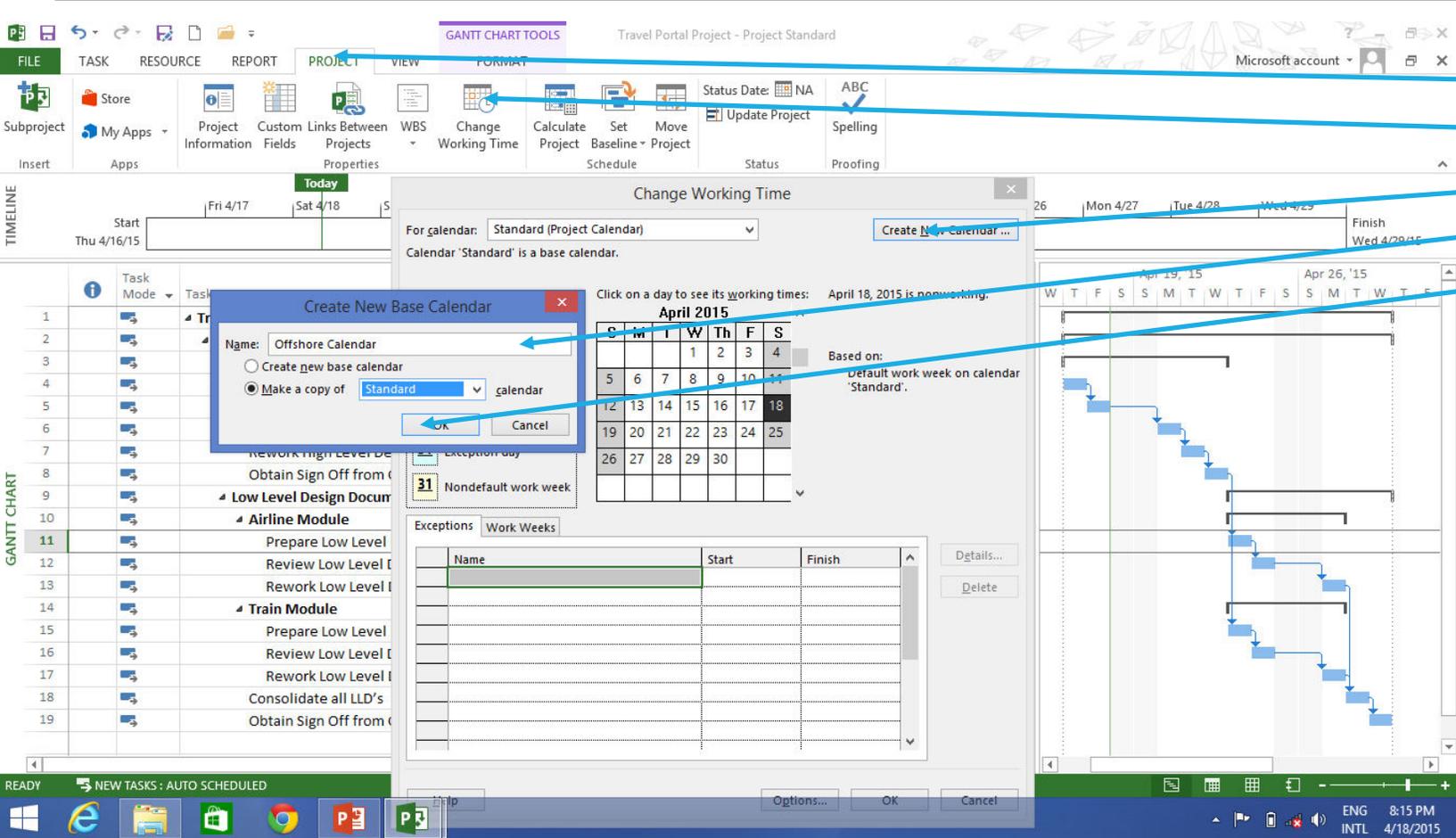
- White arrow indicates Deadline.
- Warning indicator if Deadline is going to be Missed.
- Go to Task Information
- Select Advanced Tab
- Select Deadline date
- Click OK

Calendars

- There are three calendar templates on Microsoft Project : Standard, Night Shift and 24 hours
- Create a new calendar using one of these
- Change working time for this new calendar by changing default details under work weeks.
- Provide location holiday list under Exceptions
- Set Project Calendar under Project Information
- Assign Resource Calendar to resources under resource sheet
- Track Resource specific leaves under Exception of Resource Calendar
- Assign Task Calendar to tasks under task information
- Create multiple calendars for teams working at different locations

Create a Calendar

In the Gantt Chart view



- Go to Project tab
- Change Working Time
- Create New Calendar
- Provide Name
- Click OK

Resources

- Create Resources under Resource sheet
- Resources are of three types :
 - Work – People and equipment
 - Material – Consumables
 - Cost – Associated with an activity
- If a resource is available for less than 100% for this project specify it under Maximum Units.
- Provide Standard Rates, Overtime Rates, Cost per Use
- Under Resource Tab use Assign Resources to assign resources to tasks
- Use Resource Pool to share resources across projects

Resource Sheet

In the Resource Sheet view

	Resource Name	Type	Material Label	Initials	Group	Max	Std. Rate	Ovt.	Cost/Use	Accrue	Base Calendar	Code	Add New Column
1	Resource 1	Work		R		100%	\$25.00/hr	\$0.00/hr	\$1.00	Prorated	Standard		
2	Resource 2	Work		R		100%	\$30.00/hr	\$0.00/hr	\$0.00	Prorated	Offshore Calendar		
3	R3	Material		R			\$0.00		\$0.00	Prorated			
4	R4	Cost		R						Prorated			

Resource Type
Resource Availability

Resource Calendar
Resource Rates

Assigning Resources

In the Gantt Chart view

The screenshot shows the Microsoft Project interface in Gantt Chart view. The 'RESOURCE' tab is active in the ribbon. The Gantt chart displays a task hierarchy: Travel Portal Project (14 days), Design (14 days), High Level Design Document (9 days), and Low Level Design Document (112 hrs). The task 'Prepare High Level Design Document' (5 days, 40 hrs) is selected, and its resource assignment is visible in the Gantt chart as 'Resource 1'. The 'Assign Resources' dialog box is open, showing a list of resources from the 'Travel Portal Project' with 'Resource 1' selected. The dialog box includes fields for 'Resource Name', 'Units', and 'Cost', and buttons for 'Assign', 'Remove', 'Replace...', 'Graph', 'Close', and 'Help'. Blue arrows point from the instructions on the right to the 'RESOURCE' tab, the 'Assign Resources' button, the task bar, and the 'Assign' button in the dialog box.

Task Mode	Task Name	Duration	Work	Start	Finish	P	Resource Names	Add New
	Travel Portal Project	14 days	192 hrs	Thu 4/16/15	Tue 5/5/15			
	Design	14 days	192 hrs	Thu 4/16/15	Tue 5/5/15			
	High Level Design Document	9 days	80 hrs	Thu 4/16/15	Tue 4/28/15			
	Get Inputs for High Level Design Document	1 day	16 hrs	Thu 4/16/15	Thu 4/16/15			
	Prepare High Level Design Document	5 days	40 hrs	Fri 4/17/15	Thu 4/23/15	4	Resource 1	
	Review High Level Design Document	1 day	8 hrs	Fri 4/24/15	Fri 4/24/15	5		
	Rework High Level Design Document	1 day	8 hrs	M				
	Obtain Sign Off from Customer	1 day	8 hrs	Tu				
	Low Level Design Document	5 days	112 hrs	W				
	Airline Module	3 days	40 hrs	W				
	Prepare Low Level Design Document	1 day	24 hrs	W				
	Review Low Level Design Document	1 day	8 hrs	Th				
	Rework Low Level Design Document	1 day	8 hrs	Fr				
	Train Module	3 days	40 hrs	W				
	Prepare Low Level Design Document	1 day	24 hrs	W				
	Review Low Level Design Document	1 day	8 hrs	Th				
	Rework Low Level Design Document	1 day	8 hrs	Fr				

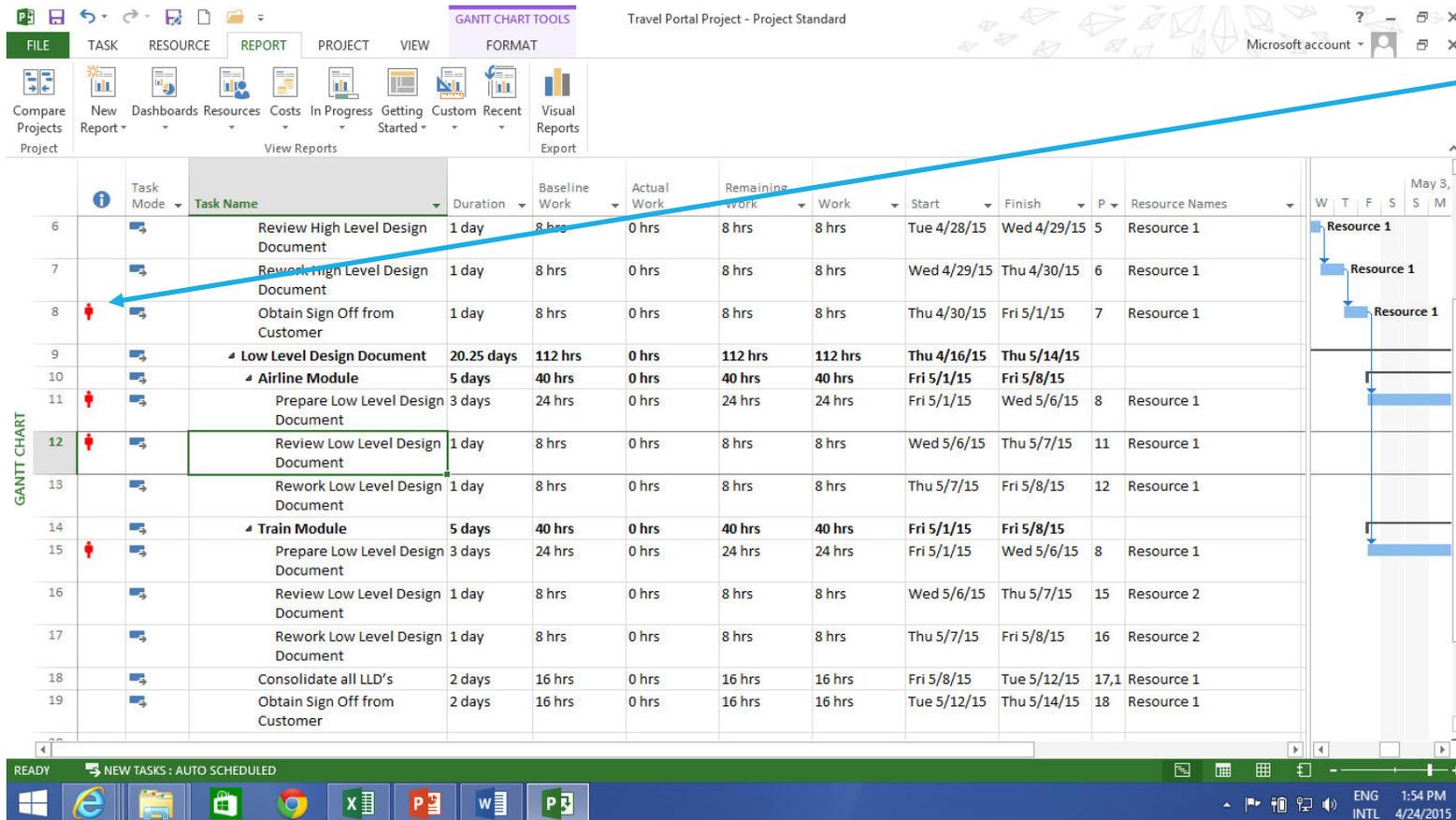
- Go to Resource Tab
- Assign Resources
- Select Resource Name
- Click Assign

Over Allocation of Resources

- Resources who are over allocated will have warning indicator
- Details of over allocation can be seen from Resource sheet, Resource Usage and Resource Graph.
- To resolve over allocation Resource Levelling technique is used
- The Resource Levelling options are:
 - Automatic – Once set the tool ensures no Resource is over allocated. But there can be many under allocations resulting in project date getting extended.
 - Manual –
 - i. Here tool looks for over allocation on minute or hourly or daily or weekly or monthly basis.
 - ii. Entire Project or only a set of activities can be levelled.
 - iii. Levelling order can be specified.
 - iv. Actions the tool can/cannot take can be specified.
 - v. Level for selected Resources or Tasks.

Over Allocation

In the Gantt Sheet view



Over Allocation highlighted in Indicator column

Over Allocation

In the Resource Sheet view

The screenshot displays the Microsoft Project interface in the Resource Sheet view. The ribbon includes FILE, TASK, RESOURCE, REPORT, PROJECT, VIEW, and FORMAT. The RESOURCE SHEET TOOLS ribbon is active, showing various task and resource management options. The Resource Sheet table is visible, with the following data:

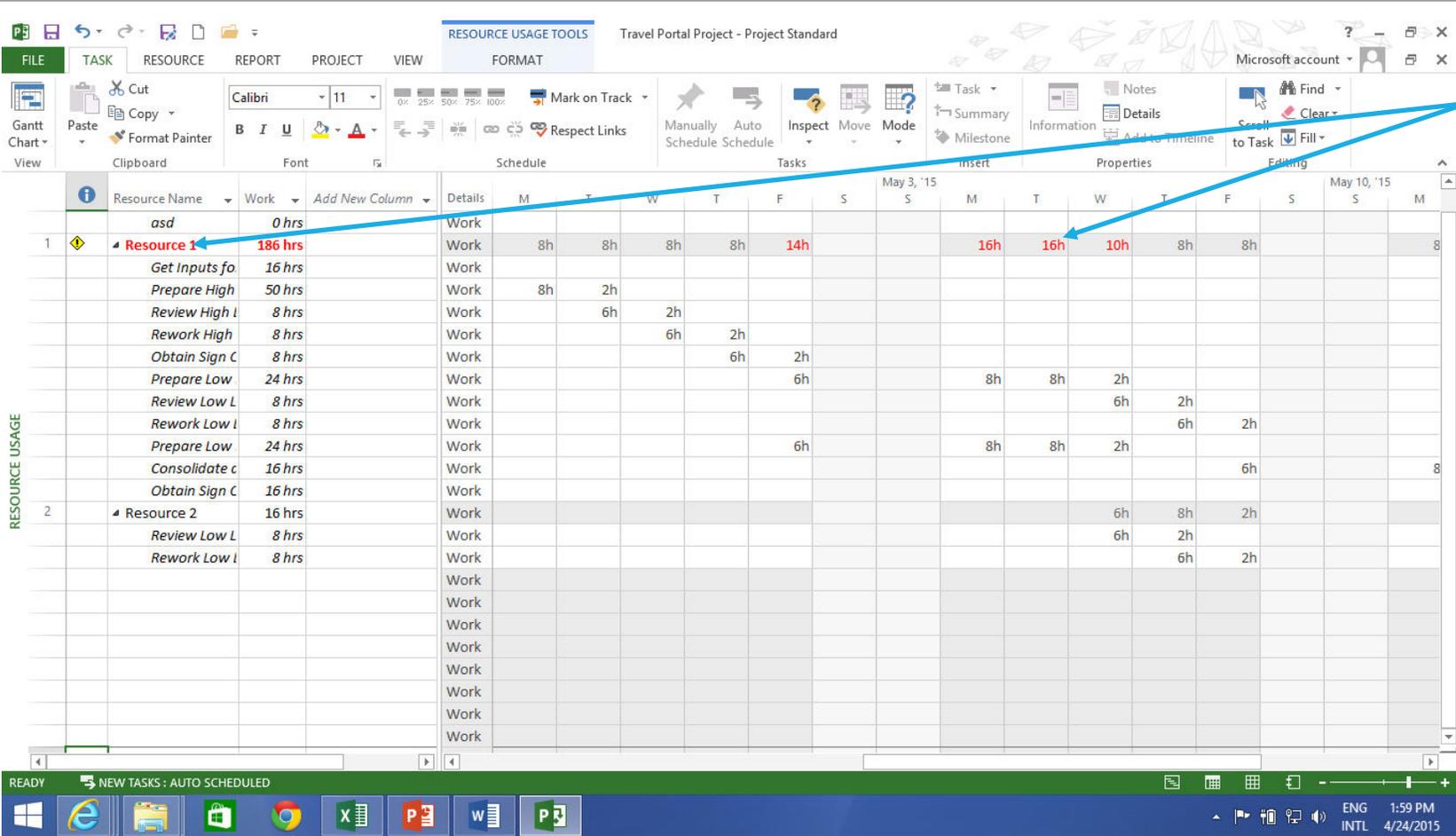
	Resource Name	Type	Material Label	Initials	Group	Max.	Std. Rate	Ovt.	Cost/Use	Accrue	Base Calendar	Code	Add New Column
1	Resource 1	Work		R		100%	\$25.00/hr	\$0.00/hr	\$1.00	Prorated	Standard		
2	Resource 2	Work		R		100%	\$30.00/hr	\$0.00/hr	\$0.00	Prorated	Offshore Calendar		

The first two rows of the Resource Sheet are highlighted in red, indicating over-allocation. A blue arrow points from the text 'Over Allocated Resource rows highlighted in red' to the red highlighting.

Over Allocated Resource rows highlighted in red

Over Allocation

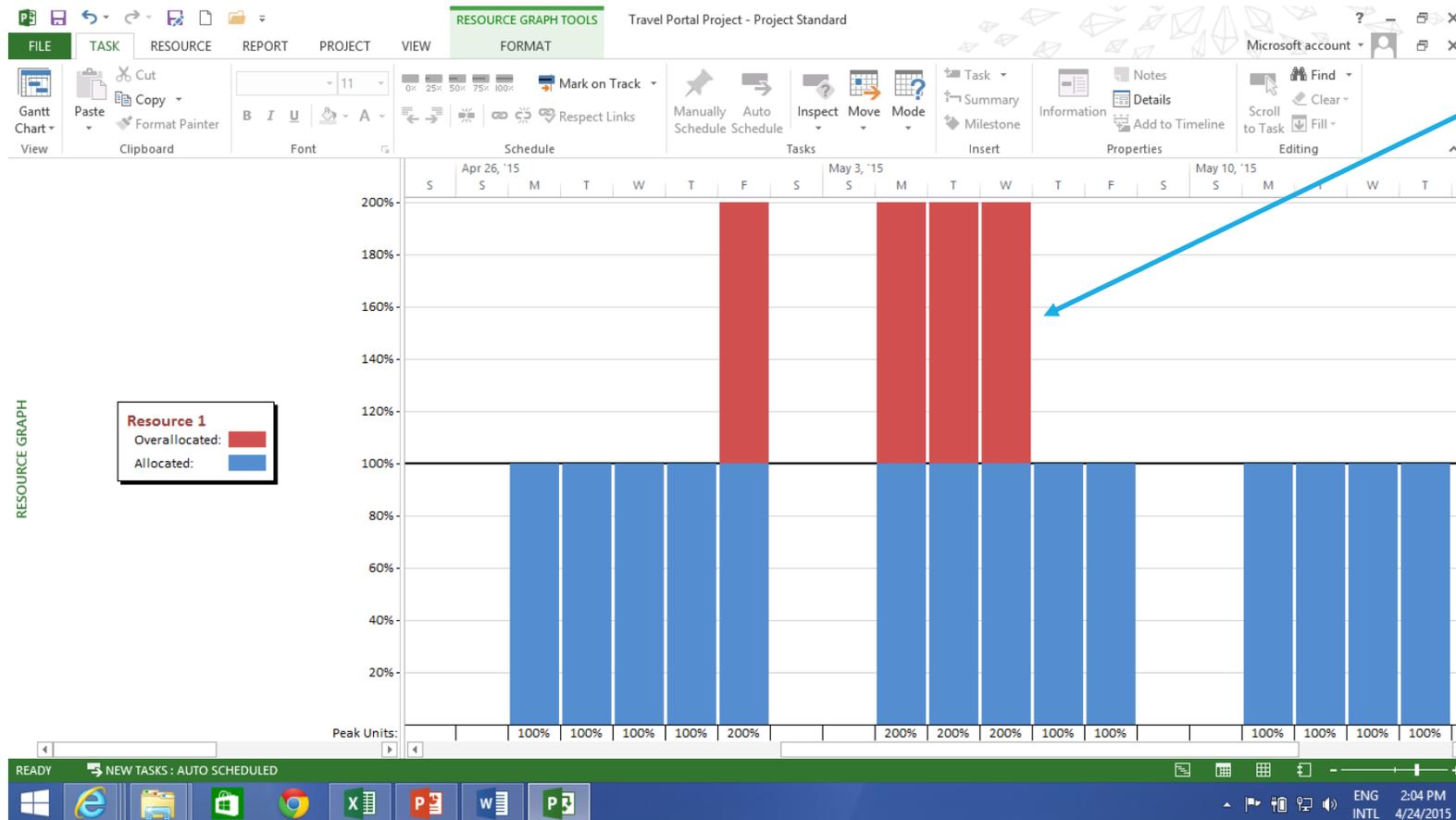
In the Resource Usage view



Over Allocated Resources and days of over allocation highlighted in red

Over Allocation

In the Resource Graph view



Over Allocation days highlighted with Percentage allocation

Resource Levelling

In the Gantt Chart view

The screenshot shows the Microsoft Project interface in Gantt Chart view. The 'Resource' tab is selected in the ribbon, and the 'Leveling Options' group is visible. The 'Resource Levelling' dialog box is open, showing the following settings:

- Leveling calculations: Automatic, Manual
- Look for overallocations on a: Day by Day basis
- Clear leveling values before leveling
- Leveling range for 'Travel Portal Project':
 - Level entire project
 - Level From: Thu 4/16/15 To: Fri 5/8/15
- Resolving overallocations:
 - Leveling order: Standard
 - Level only within available slack
 - Leveling can adjust individual assignments on a task
 - Leveling can create splits in remaining work
 - Level manually scheduled tasks

The 'Level All' button is highlighted with a blue arrow. The background Gantt Chart shows a project schedule for 'Travel Portal Project' with tasks like 'High Level Design Document' and 'Low Level Design Document' and resource bars for 'Resource 1'.

- Go to Resource Tab
- Levelling Options
- Set Levelling calculations
- Click Level All

Guidelines for Resource Levelling

- When checking for over allocation look for over allocation on a day by day basis or week by week basis only.
- If a resource is over allocated on a particular day by one or two hours only you can take a judgment call whether you want to try to reduce that over allocation or leave it.
- If a resource is over allocated for few days of the week but is within the expected hours for that week you may again want to take a judgment call whether you want to try to reduce those over allocations or leave them.
- When choosing Levelling order choose either Standard or Priority and not ID only.
- Leveling within available slack has the advantage of not changing your project end date.
- Refer to the attached document for more information on above levelling orders.



Levelling Orders

Baseline

In the Gantt Chart view

FILE TASK RESOURCE REPORT PROJECT VIEW FORMAT

Subproject Store My Apps Project Information Fields Projects Working Time Calculate Project Baseline - Project Move Update Project Spelling

Task Mod	Task Name	Duration	Work	Start	Finish
1	Travel Portal Project	19 days	192 hrs		
2	Design	19 days	192 hrs		
3	High Level Design Docum	10 days	80 hrs		
4	Get Inputs for High Lev	2 days	16 hrs		
5	Prepare High Level Des	5 days	40 hrs		
6	Review High Level Des	1 day	8 hrs		
7	Rework High Level Des	1 day	8 hrs		
8	Obtain Sign Off from C	1 day	8 hrs		
9	Low Level Design Docum	9 days	112 hrs		
10	Airline Module	5 days	40 hrs		
11	Prepare Low Level D	3 days	24 hrs		
12	Review Low Level D	1 day	8 hrs		
13	Rework Low Level D	1 day	8 hrs		
14	Train Module	5 days	40 hrs		
15	Prepare Low Level D	3 days	24 hrs		
16	Review Low Level D	1 day	8 hrs		
17	Rework Low Level D	1 day	8 hrs	Wed 5/6/15	Wed 5/6/15 16
18	Consolidate all LLD's	2 days	16 hrs	Thu 5/7/15	Fri 5/8/15 17,1
19	Obtain Sign Off from C	2 days	16 hrs	Mon 5/11/1	Tue 5/12/15 18

TRACKING GANTT

Set Baseline

Set baseline (selected)

Baseline (last saved on Sat 4/18/15)

Set into: Baseline (last saved on Sat 4/18/15)

Copy: Baseline 1

Into: Baseline 2

For: Baseline 3

Baseline 4

Baseline 5

Baseline 6

Baseline 7

Baseline 8

Baseline 9

Baseline 10 (selected)

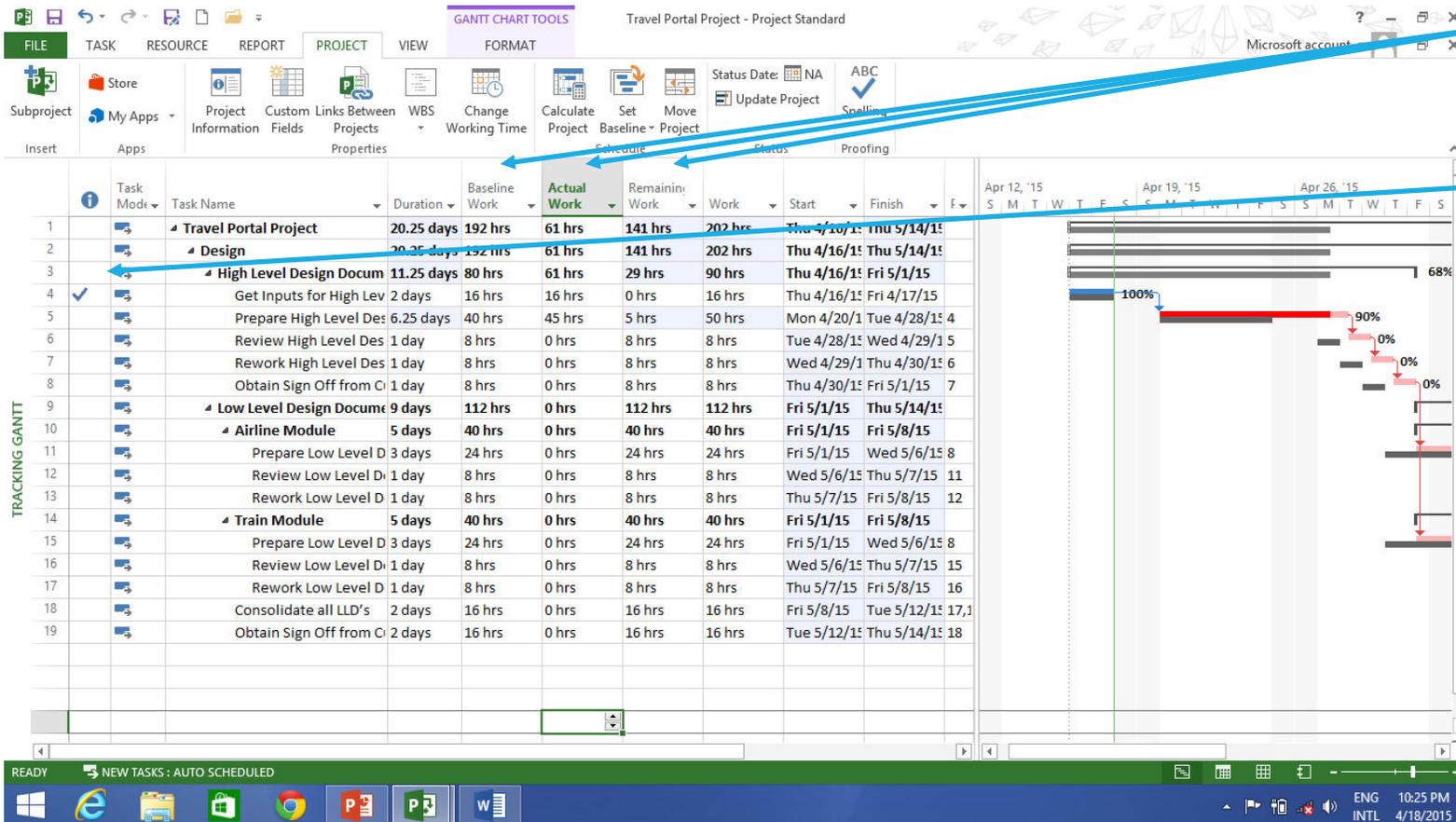
From subtasks into selected summary task(s) (checked)

Set as Default

Help OK Cancel

- Go to Project Tab
- Set Baseline
- Click OK

Tracking



- Insert Columns
Baseline Work, Actual Work,
Remaining Work
- Completed tasks will be
Reflected in the indicator
column

Report

The screenshot shows the Microsoft Project interface with the 'GANTT CHART TOOLS' ribbon active. The 'REPORT' tab is selected, and the 'Getting Started' report is highlighted in the 'VIEW' group. A blue arrow points from this menu item to the text on the right. The main workspace displays a Gantt chart for the 'Travel Portal Project' with a task list table below it.

Task ID	Task Name	Duration	Baseline Work	Actual Work	Remaining Work	Work	Start	Finish	P	Resource Names
1	Travel Portal Project									
2	Design		2 hrs	61 hrs	141 hrs	202 hrs	Thu 4/16/15	Thu 5/14/15		
3	High Level Design Document		2 hrs	61 hrs	29 hrs	90 hrs	Thu 4/16/15	Fri 5/1/15		
4	Get Inputs for High Level Design Document	2 days	20 hrs	16 hrs	0 hrs	16 hrs	Thu 4/16/15	Fri 4/17/15		Resource 1
5	Prepare High Level Design Document	6.25 days	40 hrs	45 hrs	5 hrs	50 hrs	Mon 4/20/15	Tue 4/28/15	4	Resource 1
6	Review High Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Tue 4/28/15	Wed 4/29/15	5	Resource 1
7	Rework High Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Wed 4/29/15	Thu 4/30/15	6	Resource 1
8	Obtain Sign Off from Customer	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Thu 4/30/15	Fri 5/1/15	7	Resource 1
9	Low Level Design Document	20.25 days	112 hrs	0 hrs	112 hrs	112 hrs	Thu 4/16/15	Thu 5/14/15		
10	Airline Module	5 days	40 hrs	0 hrs	40 hrs	40 hrs	Fri 5/1/15	Fri 5/8/15		
11	Prepare Low Level Design Document	3 days	24 hrs	0 hrs	24 hrs	24 hrs	Fri 5/1/15	Wed 5/6/15	8	Resource 1
12	Review Low Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Wed 5/6/15	Thu 5/7/15	11	Resource 1
13	Rework Low Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Thu 5/7/15	Fri 5/8/15	12	Resource 1
14	Train Module	5 days	40 hrs	0 hrs	40 hrs	40 hrs	Fri 5/1/15	Fri 5/8/15		
15	Prepare Low Level Design Document	3 days	24 hrs	0 hrs	24 hrs	24 hrs	Fri 5/1/15	Wed 5/6/15	8	Resource 2

Go to Report Tab and Select Getting Started to get overview of Report features

Report

The screenshot displays the Microsoft Project interface. The 'GANTT CHART TOOLS' ribbon is active, with the 'REPORT' tab selected. A blue arrow points from the 'REPORT' tab to the 'Dashboards' button. The Gantt chart shows a project schedule with tasks and resource assignments. The task list is as follows:

Task ID	Task Name	Duration	Baseline Work	Actual Work	Remaining Work	Work	Start
1	Travel Portal Project	0.25 days	192 hrs	61 hrs	141 hrs	202 hrs	Thu 4/1
2	Design	0.25 days	192 hrs	61 hrs	141 hrs	202 hrs	Thu 4/1
3	High Level Design Document	11.25 days	80 hrs	61 hrs	29 hrs	90 hrs	Thu 4/1
4	Get Inputs for High Level Design Document	2 days	16 hrs	16 hrs	0 hrs	16 hrs	Thu 4/1
5	Prepare High Level Design Document	6.25 days	40 hrs	45 hrs	5 hrs	50 hrs	Mon 4/1
6	Review High Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Tue 4/2
7	Rework High Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Wed 4/1
8	Obtain Sign Off from Customer	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Thu 4/3
9	Low Level Design Document	20.25 days	112 hrs	0 hrs	112 hrs	112 hrs	Thu 4/1
10	Airline Module	5 days	40 hrs	0 hrs	40 hrs	40 hrs	Fri 5/1/
11	Prepare Low Level Design Document	3 days	24 hrs	0 hrs	24 hrs	24 hrs	Fri 5/1/
12	Review Low Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Wed 5/1/
13	Rework Low Level Design Document	1 day	8 hrs	0 hrs	8 hrs	8 hrs	Thu 5/7
14	Train Module	5 days	40 hrs	0 hrs	40 hrs	40 hrs	Fri 5/1/
15	Prepare Low Level Design Document	3 days	24 hrs	0 hrs	24 hrs	24 hrs	Fri 5/1/

- Go to Report Tab and Select Dashboards, Resources, Costs or In Progress for predefined Reports

Report

The screenshot shows the Microsoft Project interface with the 'GANTT CHART TOOLS' ribbon active. The 'REPORT' tab is selected, and the 'Custom' button is highlighted. A dropdown menu is open, showing 'Report 1', 'Report 2', and 'Report 3'. A blue arrow points from the 'Custom' button to 'Report 1'. Below the ribbon is a task list table with columns for Task Name, Duration, Actual Work, Remaining Work, Work, Start, Finish, and Resource Names. The table contains tasks for 'Travel Portal Project', 'Design', 'High Level Design Document', 'Low Level Design Document', and 'Train Module'. A Gantt chart is visible on the right side of the screen.

Task Name	Duration	Actual Work	Remaining Work	Work	Start	Finish	Resource Names
Travel Portal Project	20.25 days	61 hrs	141 hrs	202 hrs	Thu 4/16/15	Thu 5/14/15	
Design	20.25 days	192 hrs	61 hrs	202 hrs	Thu 4/16/15	Thu 5/14/15	
High Level Design Document	11.25 days	80 hrs	61 hrs	90 hrs	Thu 4/16/15	Fri 5/1/15	
Get Inputs for High Level Design Document	2 days	16 hrs	0 hrs	16 hrs	Thu 4/16/15	Fri 4/17/15	Resource 1
Prepare High Level Design Document	6.25 days	40 hrs	45 hrs	50 hrs	Mon 4/20/15	Tue 4/28/15	4 Resource 1
Review High Level Design Document	1 day	8 hrs	0 hrs	8 hrs	Tue 4/28/15	Wed 4/29/15	5 Resource 1
Rework High Level Design Document	1 day	8 hrs	0 hrs	8 hrs	Wed 4/29/15	Thu 4/30/15	6 Resource 1
Obtain Sign Off from Customer	1 day	8 hrs	0 hrs	8 hrs	Thu 4/30/15	Fri 5/1/15	7 Resource 1
Low Level Design Document	20.25 days	112 hrs	0 hrs	112 hrs	Thu 4/16/15	Thu 5/14/15	
Airline Module	5 days	40 hrs	0 hrs	40 hrs	Fri 5/1/15	Fri 5/8/15	
Prepare Low Level Design Document	3 days	24 hrs	0 hrs	24 hrs	Fri 5/1/15	Wed 5/6/15	8 Resource 1
Review Low Level Design Document	1 day	8 hrs	0 hrs	8 hrs	Wed 5/6/15	Thu 5/7/15	11 Resource 1
Rework Low Level Design Document	1 day	8 hrs	0 hrs	8 hrs	Thu 5/7/15	Fri 5/8/15	12 Resource 1
Train Module	5 days	40 hrs	0 hrs	40 hrs	Fri 5/1/15	Fri 5/8/15	
Prepare Low Level Design Document	3 days	24 hrs	0 hrs	24 hrs	Fri 5/1/15	Wed 5/6/15	8 Resource 2

Go to Report Tab and Select Custom to create User defined Reports

Report

The screenshot shows the Microsoft Project interface with the 'Report' tab selected in the 'GANTT CHART TOOLS' ribbon. A blue arrow points from the 'Visual Reports' button to a text box on the right. The main window displays a Gantt chart and a task table.

Task ID	Task Name	Duration	Start	Finish	Resource
1	Travel Portal Project	20.25 days	Thu 4/16/15	Thu 5/14/15	
2	Design	20.25 days	Thu 4/16/15	Thu 5/14/15	
3	High Level Design Document	11.25 days	Thu 4/16/15	Fri 5/1/15	
4	Get Inputs for High Level Design Document	2 days	Thu 4/16/15	Fri 4/17/15	Resource 1
5	Prepare High Level Design Document	6.25 days	Mon 4/20/15	Tue 4/28/15	Resource 1
6	Review High Level Design Document	1 day	Tue 4/28/15	Wed 4/29/15	Resource 1
7	Rework High Level Design Document	1 day	Wed 4/29/15	Thu 4/30/15	Resource 1
8	Obtain Sign Off from Customer	1 day	Thu 4/30/15	Fri 5/1/15	Resource 1
9	Low Level Design Document	20.25 days	Thu 4/16/15	Thu 5/14/15	
10	Airline Module	5 days	Fri 5/1/15	Fri 5/8/15	
11	Prepare Low Level Design Document	3 days	Fri 5/1/15	Wed 5/6/15	Resource 1
12	Review Low Level Design Document	1 day	Wed 5/6/15	Thu 5/7/15	Resource 1
13	Rework Low Level Design Document	1 day	Thu 5/7/15	Fri 5/8/15	Resource 1
14	Train Module	5 days	Fri 5/1/15	Fri 5/8/15	
15	Prepare Low Level Design Document	3 days	Fri 5/1/15	Wed 5/6/15	Resource 2

Go to Report Tab and Select Visual Reports to View reports in Visio formats

Exercise – Impact of Task Types

In a new Microsoft Project enter following details :

Task	Task Type	Effort Driven	Work	Duration	Resource Names
Task A	Fixed Work	checked	160 hours	Do not Enter	R1, R2
Task B	Fixed Duration	checked	Do not Enter	10 days	R3, R4
Task C	Fixed Duration	unchecked	Do not Enter	10 days	R5, R6
Task D	Fixed Units	checked	Do not Enter	10 days	R7, R8
Task E	Fixed Units	unchecked	Do not Enter	10 days	R9, R10

The tool calculates Work/Duration columns. What do you notice?

Change only the Resource column by removing one Resource for each task. What do you notice?

Manual Scheduling

- Microsoft Project 2010 and 2013 provide Manual Scheduling option. This option can be used when only a high level WBS is available and task details will be known as the project rolls on.
- Enter a summary task and provide a start and finish date.
- Enter the tasks under the summary task as they become known with the start and finish date.
- If the dates for the tasks are not yet decided you can enter the text TBD.
- If the duration of the tasks exceeds the summary duration warning is highlighted. Right click and select Fix in Task Inspector to fix the errors.