# Microsoft Project Managment

## Chapter2: Creating a Task List
## (First part)

# Creating a Task List

**tasks** represent the work to be done to accomplish the goals of the project. Tasks describe project work in terms of *sequence*, *duration*, and resource requirements. In Project, there are several different kinds of tasks. These include summary tasks, subtasks, and milestones. More broadly, what are called tasks in Project are sometimes also called **activities** or work **packages**. we manage the scheduling of tasks in two different ways:

● Enter tasks as manually.
● Work with automatically scheduled tasks.

**Creating a New Project Plan:**

A project plan is a model that you construct of some aspects of a project you are anticipating (توقع)—what you think will happen, or what you want to happen. This model focuses on **tasks**, **resources**, **time** , and possibly their associated **costs**.

**Creating a Task List:**

Project focuses primarily on time. You might know the planned start date of a project, the planned finish date, or both.

When working with Project, you specify only one date, not both: the project start date or the project finish date. Why? Because after you enter the project start or finish date and the durations of the tasks, Project calculates the other date for you.

Remember that Project is not just merely a static repository of your schedule information or a Gantt chart drawing tool; it is an active scheduling engine

# Creating a Task List:

Most projects should be scheduled from a start date, even if you know that the project should finish by a certain deadline date.

Scheduling from a start date causes all tasks to start as soon as possible, and it gives you the greatest scheduling flexibility.

## Start Project:

1. Click the **File** tab.
2. Click the **New** tab.
   Project displays your options for creating a new project plan.
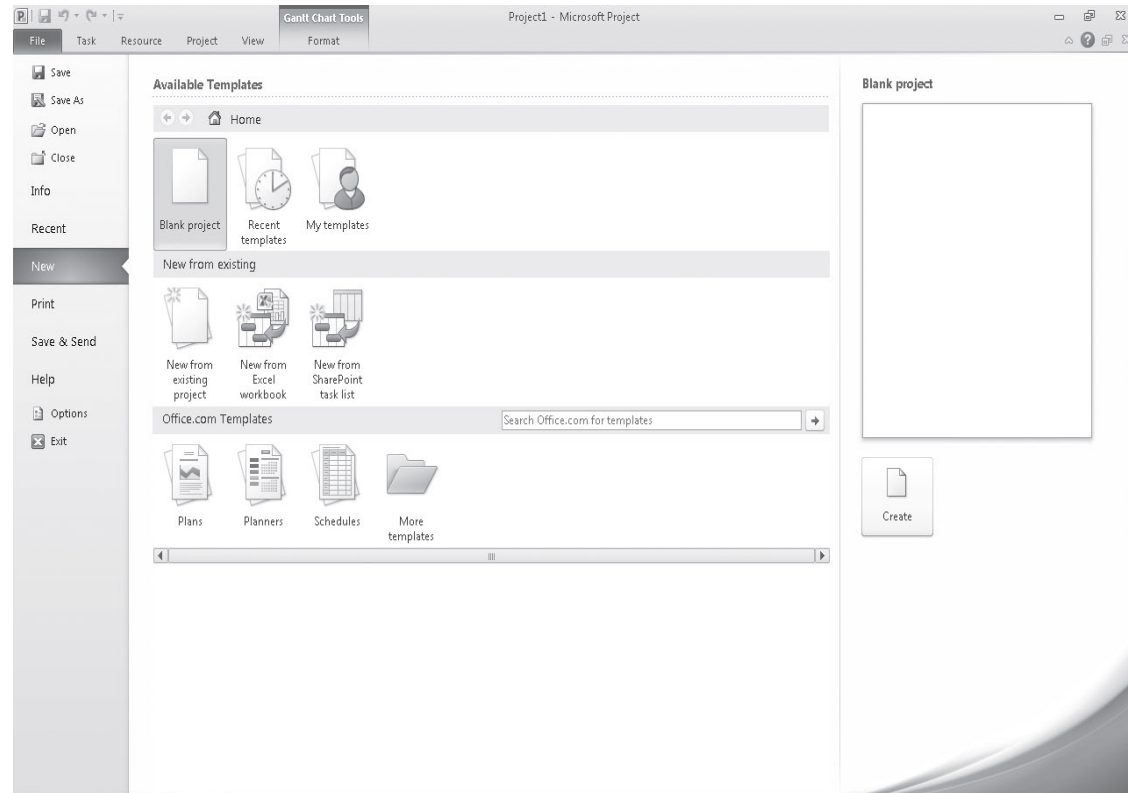
## Start Project:

These options include using templates installed with Project or available on the Web.

**3.** Under **Available Templates**, make sure that **Blank project** is selected, and then click the **Create** button on the right side of the Backstage view.

*Notice* the thin orange vertical line in the chart portion of the Gantt Chart view. This indicates the current date.

**4.** On the Project tab, in the Properties group, click Project Information. The Project Information dialog box appears.

**5.** In the Start Date box, type 1/2/12, or click the down arrow to display the calendar and select January 2, 2012.

*Tip* In the calendar, you can navigate to any month and then click the date you want, or click Today to quickly choose the current date.

## Start Project:



6. Click **OK** to accept this start date and close the **Project Information** dialog box.

7. On the **File** tab, click **Save**.

8. Locate the folder in the Project 2010

9. In the **File name** box, type **Simple Tasks**.

10. Click **Save** to close the **Save As** dialog box.

# Entering Task Names

Task names should be recognizable and make sense to the people who will perform the tasks and to other stakeholders who will see the task names. Here are some guidelines for creating good task names:

- Use short verb phrases that describe the work to be done, such as "Edit manuscript."
- If tasks will be organized into phases, don't repeat details from the summary task name in the subtask name unless it adds clarity.
- If tasks will have resources assigned to them, don't include resource names in the task names.

***Keep in mind*** that you can always edit task names later, so don't worry about getting exactly the right task names when you're initially entering them into a project plan.
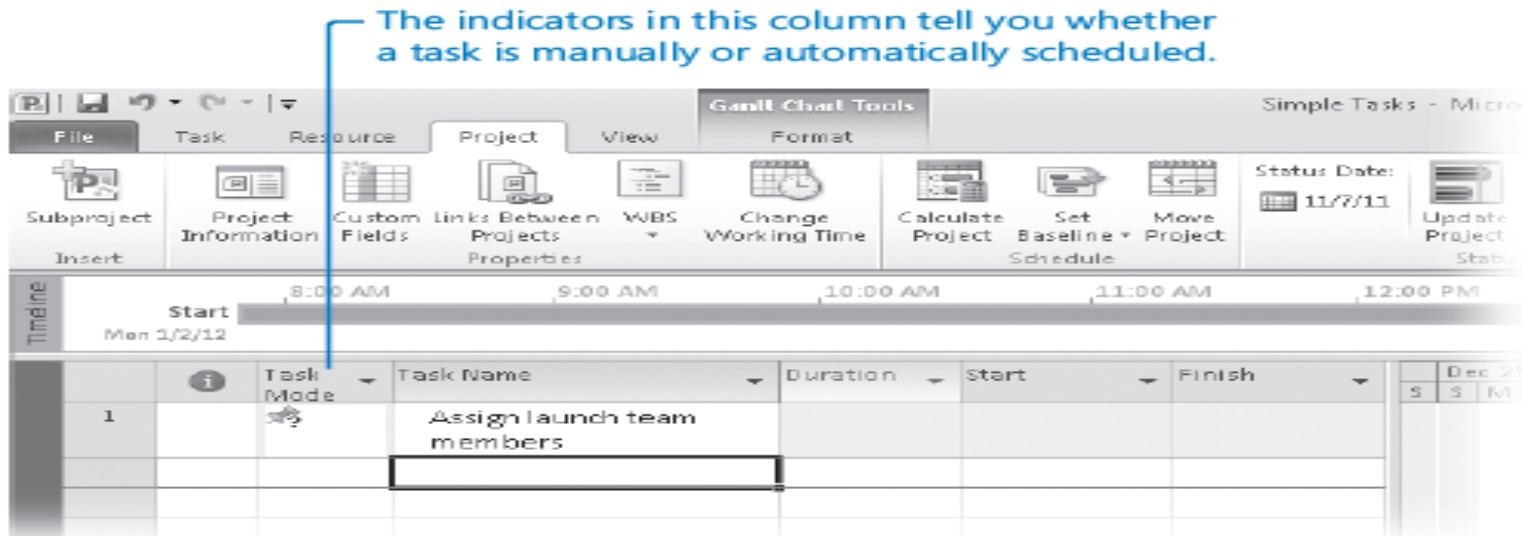
## Entering Task Names

In this section, you enter some initial tasks required for the new book launch events.

**1.** Click the cell directly below the **Task Name** column heading.

**2.** Type **Assign launch team members**, and then press the Enter key.

The task you entered is given an ID number. Each task has a unique ID number, but it does not necessarily represent the order in which tasks occur. Your screen should look similar to the following illustration.

## Entering Task Names

Because this is a manually scheduled task (as indicated in the Task Mode column), no duration or date values appear, and the task does not yet have a Gantt bar in the chart portion of the Gantt Chart view. Later you will work with automatically scheduled tasks that always have duration, start, and finish dates.

**3.** Enter the following task names, pressing Enter after each task name:
- **Design and order marketing material**
- **Public Launch Phase**
- **Distribute advance copies**
- **Coordinate magazine feature articles**
- **Launch public web portal for book**

Your screen should look similar to the following illustration:

# Entering Task Names:

# Entering Durations:

**Durations**—the amount of time you expect it will take to complete the task. Project can work with task durations that range from **minutes to months**. Depending on the scope of your project, you'll probably want to work with task durations on the scale of **hours**, **days**, and **weeks**.

## *Tip*

Project determines the overall duration of a project plan by calculating the difference between the earliest start date and the latest finish date of the plan's tasks.

The plan's duration is also affected by other factors, such as task relationships "Linking Tasks".

# Entering Durations:

When working in Project, you can use abbreviations for durations.

| If you enter this abbreviation | It appears like this | And it means |
|---|---|---|
| m | min | Minute |
| h | hr | Hour |
| d | day | Day |
| w | wk | Week |
| mo | mon | Month |

*Automatically scheduled tasks* always have a duration (one day by default). *Manually scheduled tasks*, You can, however, enter duration values for manually scheduled tasks.

With manually scheduled tasks, you can enter:
1- regular duration values using the abbreviations shown previously; for example, 3d for three days. You can also
2- text values.

**Entering Durations:**

Project uses standard values for minutes and hours for durations: 1 minute equals 60 seconds, and 1 hour equals 60 minutes.

For the durations of days, weeks, and months you can use Project's defaults (for example, 20 days per month) or set your own values.

To do this, on the **File** tab, click **Options**, and in the Options dialog box, click the **Schedule** tab, as illustrated here:



With a setting of 8 hours per day, entering a two-day task duration (2d) is the same as entering 16 hours (16h).

With a setting of 40 hours per week, entering a three-week task duration (3w) is the same as entering 120 hours (120h).

With a setting of 20 days per month, entering a one-month task duration (1mo) is the same as entering 160 hours (8 hours per day × 20 days per month).

# Entering Durations:

In this example we use the default values: 8 hours per day, 40 hours per week, and 20 days per month.

We enter various duration values for the tasks you've created.

1. Click the cell below the **Duration** column heading for task 1, *Assign launch team members*.

The **Duration** field for task 1 is selected.

2. Type **1d**, and then press Enter.

The value *1 day* appears in the Duration field. Project draws a Gantt bar for the task, starting at the project start date you previously set.

| | ⓘ | Task Mode | Task Name | Duration | Start | Finish | Dec 25, '11 | Jan 1, '12 |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | S S M T W T F | S S M T W T F S |
| 1 | | 📌? | Assign launch team members | 1 day | | | | |
| 2 | | 📌? | Design and order marketing material | | | | | |
| 3 | | 📌? | Public Launch Phase | | | | | |
| 4 | | 📌? | Distribute advance copies | | | | | |
| 5 | | 📌? | Coordinate magazine feature articles | | | | | |
| 6 | | 📌? | Launch public web portal for book | | | | | |

# Entering Durations:

Until the tasks are linked or a specific start or finish date is set, Project will set all new tasks that have a duration value to start at the Project Start date. This is true whether the tasks are manually or automatically scheduled.

**3.** Enter the following durations or text phrases for the following tasks:

| Task ID | Task name | Duration |
|---------|-----------|----------|
| 2 | Design and order marketing material | **Check with Marketing team** |
| 3 | Public Launch Phase | (press Enter to skip this task for now) |
| 4 | Distribute advance copies | **2d** |

For task 5, Coordinate magazine feature articles, you'll enter start and finish dates and Project will calculate the duration. In the Start field (not the Duration field) for task 5, type or  select 1/16/12, and then press the Tab key. In the Finish field for the same task, type or select 1/24/12, and then press Enter

**Entering Durations:**

**4.** For task 6, *Launch public web portal for the book*, you don't know a duration or start or finish date yet, but you can still capture what you do know. In the **Start** field for task 6, type **About two weeks before launch complete**, and then press Enter.

     As with the duration value of a manually scheduled task, you can also enter a **text string** for a start or finish date, or both. When the task is switched to be automatically scheduled, the text strings will be replaced with specific dates.

# Entering Durations:

For the projects you work on in this book, the durations are usually supplied for you. For your projects, you will often have to estimate task durations. Good sources of task duration estimates include:

- Historical information from previous, similar projects
- Estimates from the people who will complete the tasks
- The expert judgment of people who have managed similar projects
- The standards of professional or industrial organizations that carry out projects similar to yours

# Entering a Milestone :

Milestones are significant events that are either reached within the project (such as completion of a phase of work) or imposed upon the project (such as a deadline by which to apply for funding). Because the milestone itself doesn't normally include any work, milestones are represented as tasks with zero duration.

We can create a milestone task:
1. Click the name of task 3, Public Launch Phase.
2. On the Task tab, in the Insert group, click Milestone.

Project inserts a row for a new task and renumbers the subsequent tasks. Project names the new task "<New Milestone>" and gives it a zero-day duration. As with the other new tasks, the milestone is initially scheduled at the project start date of January 2
3. Type Planning complete! and then press Enter.

The milestone task is added to your plan.

# Entering a Milestone :



On the Gantt chart, the milestone appears as a diamond.
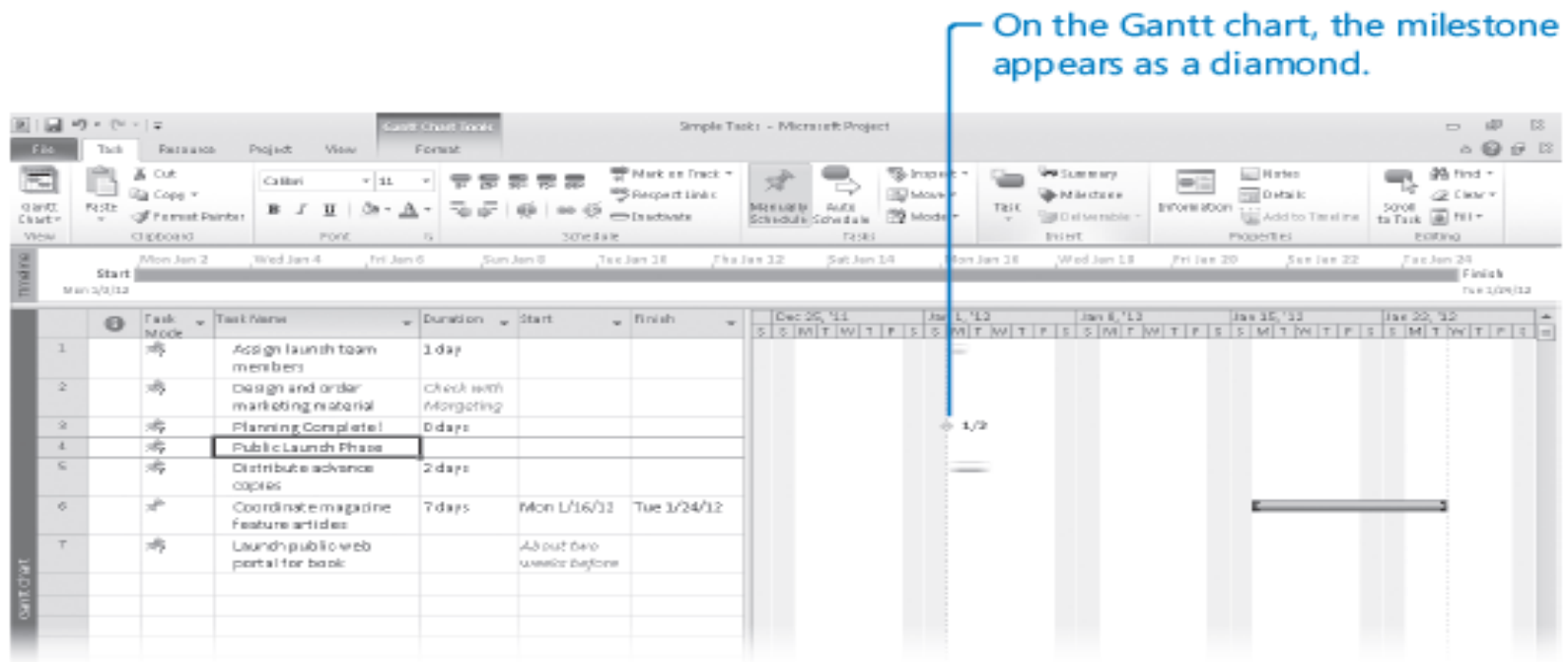
*__Tip__* You can mark a task of any duration as a milestone. Double-click the task name to display the Task Information dialog box, and then click the Advanced tab and select the "Mark task as milestone" option.

## Organizing Tasks into Phases:

It is helpful to organize groups of closely related tasks into phases. When reviewing a project plan, seeing tasks organized into phases helps you and your **stakeholders** think in terms of major work items. For example, it is common to divide book publishing projects into Editorial, Design, and Production phases. You create phases by indenting and outdenting tasks. In Project, phases are represented by summary tasks, and the tasks indented below the summary task are called *subtasks*.

1. Select the names of tasks 5 through 7.
   These are the tasks you want to make subtasks of the public launch phase.
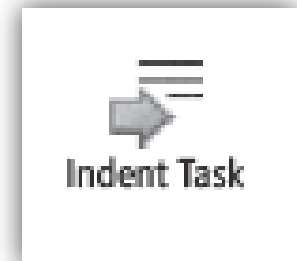


Indent Task

# Organizing Tasks into Phases:

**2.** On the **Task** tab, in the **Schedule** group, click **Indent Task**. Project promotes task 4 to a summary task. Or you can think of it as Project demoting tasks 5 through 7 to subtasks; either way, the project plan now includes a summary task.
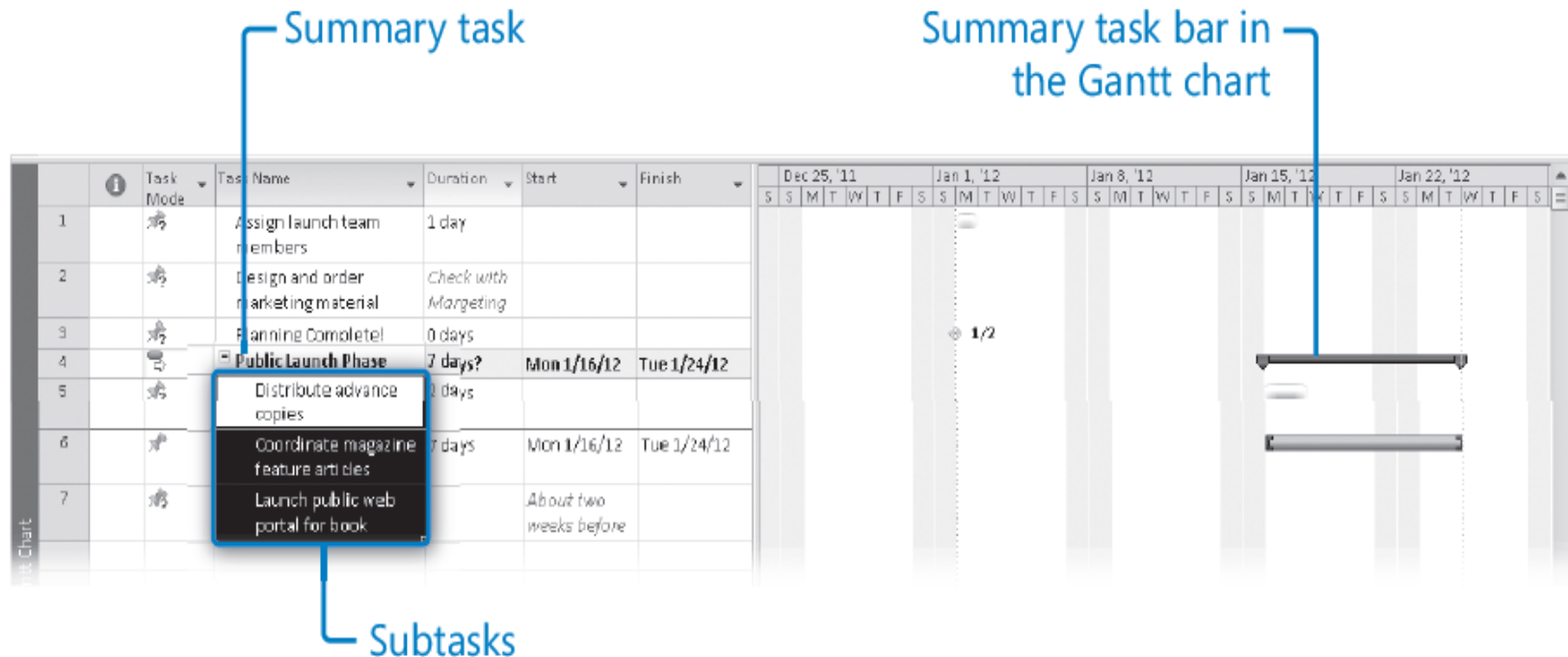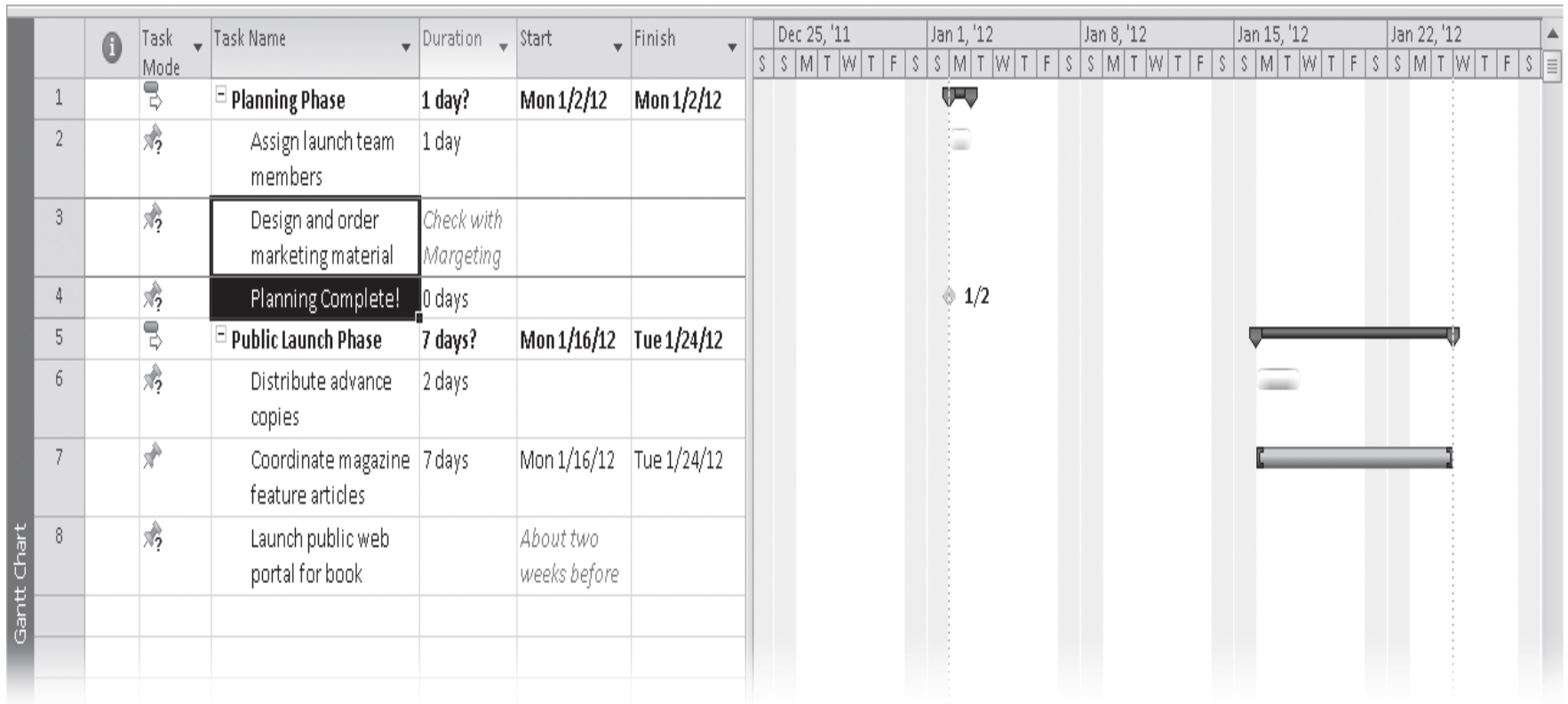
# Organizing Tasks into Phases:

**3.** Select the name of task 1, *Assign launch team members*.

**4.** On the **Task** tab, in the **Insert** group, click **Summary**.

Project inserted a row for a new task, indented the task directly below it, and renumbered the subsequent tasks. Project names the new task "<New Summary Task>."

**5.** With the name of the new summary task selected, type **Planning Phase** and press Enter.

**6.** Select the names of tasks 3 and 4. You will indent these tasks under the summary task 1.

**7.** On the **Task** tab, in the **Schedule** group, click **Indent Task**.

# Organizing Tasks into Phases:



Now the project plan is organized into two phases of work.

# Project Management Focus: Top-Down and Bottom-Up Planning :

The two most common approaches to developing tasks and phases are top-down and bottom-up planning:

- **_Top-down planning_** identifies major phases or components of the project before filling in the tasks required to complete those phases. Complex projects can have several layers of phases. This approach works from general to specific.
- **_Bottom-up planning_** identifies as many of the bottom-level detailed tasks as possible before organizing them into logical groups called _phases_ or _summary tasks_. This approach works from specific to general.

The end