The following sets of instructions will help you navigate the basics of Microsoft Project:

**Default View**

**Gantt Chart and Gantt Chart (Task) Spreadsheet**

NOTE: I like to turn on the View Bar if it is not already on (this is the left button bar that uses icons to show the main views available in Project).

1. Right click in vertical gray area that says Gantt Chart.
2. Choose View Bar.

**View Bar Options**

Project 2016 organizes project data to be viewed in a variety of ways. The most common options are located on the View Bar. Besides the Gantt Chart, you can view projects as a Calendar, Network Diagram, timelines, spreadsheets, and so forth. We will explore some of these today and more of them in the coming weeks.

**Project 2016 Organization**

Each View (Gantt Chart, Network Diagram, Calendar, etc.) has a set of tabs with options.

The organizing Tabs for each View are:

1. **File**—Allows you to Open, Save, Print, etc. MS Project files
2. **Task**—Organizes your data based on your project tasks. This will be helpful in both scheduling and tracking projects
3. **Resource**—Organizes your data based on your project resources. This will be helpful in assigning resources and monitoring their allocation.
4. **Report**—Provides you with pre-designed and customizable options for reporting the status of your project.
5. **Project**—Provides some functionality for defining the properties of your project and its schedule.
6. **View**—Allows you to manipulate what you see on the screen, both in the way data is displayed and the information contained in the various project organizing options.
7. **Format**—Allows you to make style changes
First Steps--How to Start a New Project

1. Choose File tab and choose New.

First Steps--How to Set the Project Start

1. Choose Project tab.
2. In Properties box, click on Project Information.
3. Set Project Start Date.
4. Click [OK].

If you would like to set the Project End Date instead

1. Choose Project tab.
2. In Properties box, click on Project Information.
3. Set Schedule from to Project End Date.
4. Set Project End Date.
5. Click [OK].

First Steps--Setting Up Print Options

1. Choose File tab.
2. Choose Print.
4. Under Page tab
   a. Set page orientation--usually landscape.
   b. Set Scaling--usually Adjust to 100%. Note: Scaling changes the size of the printed output.
5. Under Margins
   a. Set Margins--usually .5 in.
   b. Set Borders.
6. Under Header.
   a. Set alignment.
   b. Type header.
   c. Adjust header details (font, page numbering, etc.).
7. Under Footer
   a. Set alignment.
   b. Type footer.
   c. Adjust footer details (font, page numbering, etc.).
   d. Make sure you do something about the Project Default of printing page number in footer.
8. Under Legend
   a. Set alignment.
   b. Choose position.
c. Adjust legend details.
d. The legend can be a problem because it is unwieldy and takes up space on your output.

9. Under View
   a. Probably check off default setting--Set Timescale to End of Page.
   b. Check other page options such as number of columns in spreadsheet to be printed.

Creating a Gantt Chart

The Default columns on the Gantt Chart “sheet” are Information, Task Name, Duration, Start, Finish, Predecessor, and Resource Names. You don’t need all that information to get started, just three: *Task Name, Duration, and Predecessor.*

1. For now, make sure you choose Auto Scheduled on the bottom left of the page.
2. **DON’T FORGET YOUR START AND END NODES.**
3. Enter Task Names.
4. Enter Durations. You can specify weeks, days, hours, months, or quarters. Weeks (wks) is the default.
5. **NEVER ENTER START AND FINISH DATES. THESE ARE CALCULATED FOR YOU.**
6. Enter Predecessors by number.

Changing Project Activity Data

1. Highlight data to be edited.
2. Enter changes.
3. Hit [enter].
4. All effected project data will change automatically.

Inserting a New Task

1. Highlight the row of the spreadsheet below where you want to insert a task (it will be added above the line you choose).
2. Choose Task tab
3. In Insert box, click Task (or Summary Task, or Milestone) icon.
4. Enter new task in available space.

You can also right click and choose Insert Task once you have highlighted the relevant row.

Linking Tasks

The default link between a task and its predecessor is the FS link. That means that the
predecessor task "F"inishes before the task "S"tarts.

You can specify other types of linkages:

FF--The tasks may start whenever, as long as they finish at the same time.
SS--The task must start at the same time.

To change from the default linkage:

1. Choose Task tab
2. In Properties box, click on Information or
3. Double click on the task
4. Choose Predecessors tab.
5. Change type of linkage using pulldown menu.
6. Click [OK].

You can also just type SS or FF after the predecessor in the task sheet.

**Alternative Views**

**Network Diagram**

1. Click on Network Diagram icon on left button bar.

**Gantt Chart and Gantt Chart Spreadsheet with critical path highlighted**

1. Click on Detail Gantt icon on the left button bar.

Or

1. More Views icon on left button bar.
2. Choose Detailed Gantt.
3. Click on Apply.

**Timeline**

1. Click on Timeline icon on left button bar or above Gantt chart.
2. Double click inside timeline and add tasks, as desired.
3. Click OK.

**Calendar**

1. Click on Calendar icon on left button bar.
Task Spreadsheet

1. Click on Task Sheet icon on the left button bar.

Or

1. Click on More Views icon on left button bar.
2. Choose Task Sheet.
3. Click on Apply.

Zoom In/Zoom Out

1. Go to View tab
2. In Zoom box
3. Choose Timescale for days, weeks, months (etc.) or
4. Click on Magnifying Glass icon (+) to zoom in and show Gantt chart in finer detail.
5. Clicking on Magnifying Glass icon (-) will zoom out and show Gantt chart in less detail.
6. Clicking on Whole Project will zoom out until the whole project is on the screen,

NOTE: ZOOM IN/ZOOM OUT WORKS ON OTHER VIEWS, BUT ITS EFFECT IS SLIGHTLY DIFFERENT IN EACH VIEW.