

Microsoft Project Professional 2013 "basics"

1) Open Microsoft Project Professional 2013 and select "New Project" ("Nouveau Projet").

2) Project settings

2.1) Click on the "FILE" ("FICHIER") tab then on "Options".

2.2) Under "General", select an appropriate **date format**.

2.3) Under "Display" ("Affichage"), select the appropriate **currency**, its symbol and its placement.

2.4) Under "Schedule" ("Échéancier"):

2.4.1) For "New tasks created" ("Nouvelles tâches créées"), select "Automatically scheduled" ("Planifié automatiquement").

2.4.2) For "Display work in" ("Afficher le travail en"), select "Days" ("Jours") instead of "Hours" ("Heures").

2.4.5) Uncheck "New tasks have an estimated duration" ("Les nouvelles tâches planifiées ont une durée estimée").

2.5) Under "Advanced options" ("Options avancées"), change the time unit for "Default standard rate" ("Taux standard par défaut") to "d" (day) or "j" (jour) instead of "hr" (hour) or "h" (heure).

2.6) Click on "OK" to save changes.

2.7) Click on "Save as" ("Enregistrer sous") to save what you have done so far in a ".mpp" document with an appropriately chosen name!

(At this stage, the "Gantt chart" ("Diagramme de Gantt") should be displayed and the "TASK" ("TÂCHE") tab should be selected...)

3) Project start date

3.1) Click on the "PROJECT" ("PROJET") tab.

3.2) Click on "Project information" ("Informations sur le projet").

3.3) Set the "Start date" ("Date de début") to the desired date (possibly different from the current date...).

3.4) Click on "OK" to save changes.

4) Project, WP and task naming

4.1) In the "Task Name" ("Nom de la tâche") column, enter the name you have chosen for the **project** (on the top/1st line) and **work package** (WP) or **task names** on the other lines.

4.2) To insert a new line (WP or task) above a given line, right-click on the line number and select "Insert task" ("Insérer une tâche"). Likewise for "Delete task" ("Supprimer une tâche").

4.3) To **move a line**, click on its number then drag & drop it wherever required.

5) Project, WP and task hierarchy

5.1) Click on the "**TASK**" ("TÂCHE") tab.

5.2) In order to reflect the appropriate WBS hierarchy, select tasks under each WP and click on the "**Right arrow**" on the left of the 4th section of the top toolbar to **indent** them, then do the same for each WP.

(The Project should remain at the top level, WPs should be at level 2 and tasks within WPs at level 3.)

(Multiple selection and indentation of lines is possible.)

(You may want to select WPs that have no subordinate tasks and change their style to "**B (Bold)**" ("G (Gras)") by clicking on the appropriate letter in the 3rd section of the top toolbar.)

6) Task sequencing

6.1) Click on "**Predecessors**" ("Prédécesseurs") then drag & drop the column to the right of "Task names".

6.2) For each item (task or WP without subordinate tasks) in the hierarchical list, except for the 1st WP/task below the Project (1st line), enter **one or several line numbers** (separated by a semi-colon (";")) in the "Predecessors" column, in order to establish the (chrono)logical **relationships between tasks**.

Note that Predecessor info should be entered **only at the lowest level of a WP** (which is the WP itself if it has no subordinate tasks...).

(Do not enter Predecessor info for "Project management" if this WP extends from the beginning to the end of the project.)

(You can **change the width** of the "Predecessors" column (as of any other column) by moving its rightmost border line.)

7) Resources

7.1) Click on "**Resource names**" ("Noms ressources") then drag & drop the column to the right of "Predecessors".

7.2) You can enter resource names (or abbreviations) in the "Resource Names" column but it is advisable to define resources in the "Resource sheet" first, as follows:

Click on the "**VIEW**" ("AFFICHAGE") tab then on "**Resource sheet**" ("Tableau des ressources") in the 2nd section of the top toolbar.

In the "**Resource Name**" ("Nom de la ressource") column of the "Resource sheet", enter the names (preferably abbreviated) of the various resources assigned to the project.

For each resource, under "**Standard rate**" ("Tx. standard"), enter the **cost per "day"** ("jour"), which is NOT the default setting (but it should have been changed as per 2.5 above).

Now click on "**Gantt chart**" in the left section of the top toolbar to return to the "Gantt view" of the project.

For each item at the lowest level of the hierarchical list, in the "Resource Names" column, **select the resources** assigned to that particular WP/task **from the drop-down menu** displayed when you click in a cell (or enter the resources names/abbreviations directly, separated by a semi-colon (";")).

If a given resource should be assigned only part of her/his time to a given task, enter the **appropriate percentage in square brackets** after the resource name/abbreviation (eg "PM[50%]"). In such a case, you will probably be prompted to choose an option such as "Change the workload" ("Modifier la quantité de travail").

Note that Resource info should be entered **only at the lowest level of a WP** (which is the WP itself if it has no subordinate tasks...).

8) Durations

For each item at the lowest level of the hierarchical list, in the "Duration" column, enter the duration (in days for this example) of the WP/task. You will probably be prompted to choose an option such as "Increase the workload" ("Augmenter la quantité de travail").

The duration of the "Project management" WP may be (is usually) equal to the total duration of the project, as appears on the top line of the hierarchy.

(If you didn't follow the instructions in 2.4.5 above and want to get rid of the "?" that appears after each duration, select all lines in the "Duration" column, right-click and select "Information" from the menu then uncheck "Estimated" ("Estimée") in the dialog box which is displayed.)

Remember that Duration info should be entered **only at the lowest level of a WP** (which is the WP itself if it has no subordinate tasks...).

9) Schedule

The schedule of the project is established automatically, but you need to set the **start date** if the current (default) date is not convenient, which you should have done, or can do now, by following the instructions in 3.3 above.

Make any necessary adjustment to other manually-scheduled tasks (or work packages).

Note that the "Finish" ("Fin") dates are calculated automatically.

10) Cost

Click on "**Add New Column**" ("Ajouter une nouvelle colonne") and select "**Cost**" ("Coût") from the drop-down menu in order to display the costs of the WPs/tasks and of the whole project (top line), which are calculated automatically.

(Note that the thousands separator may be displayed as a space and the decimal point may be displayed as a comma if you are using the French version of MS Project.)

11) Workload

Click on "**Add New Column**" and select "**Work**" ("Travail") from the drop-down menu in order to display the workloads (in person-days) of the WPs/tasks and of the whole project (top line), which are calculated automatically.