digital training skills toolkit

Getting started in Microsoft Project

Project Start date

Set project start date using the Project menu and Project Information

Enter tasks

Enter tasks under Task Name, estimate time, change to Auto Schedule

Group Tasks under summary tasks

Highlight tasks and group under a summary task using the task menu and Summary

Use Outdent and Indent to change the level

Add tasks

Add in extra tasks and allocate times using the task menu and task

Link tasks

Drag between entries on the chart or use the link button on the task menu. Double-click the link line to change the relationship.
Create Resources

Select Resource sheet and add resources. Set hourly rates. Printing is a material - add units. Costs are for unknowns such as train tickets or biscuits.

Assign resources

In Gantt chart view, Right Click task to Assign Resources

Look at details

Double click tasks to look at resources or turn on details pane.

See the critical path

Click on the Gantt chart and there are many options on the tools menu including **Critical Path**
Fix over allocations

Right click and individually reschedule or use task inspector. Alternatively add resources or, on the resource menu select level all.

Use the resource usage view to see and fix problems.

Set a baseline

Using the tracking Gantt offers a comparison.

Enter Actual values

On the View menu select the Work table to enter work done or remaining.
Project overviews

Using the Project menu and Project Information, click on Statistics to get an overview.

Turn on timeline in the view menu. Right click the timeline to choose selected tasks. Right click a timeline bar to turn into a callout.