PREVIEW VERSION

Bridge Technical Services

Notebook Series # MSP-01

PREVIEW VERSION

PROJECT QUICK GUIDE

Step-by-Step Guide to Create and Set Up a New Project in Microsoft Project

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PURPOSE

This is a quick guide for creating and setting up a project in Microsoft Project. Screenshots are from Microsoft Project Online Desktop Client, Version 2211.

PROCEDURE

1.0 Collect Project Information

These are the project details you should have before starting a project in MS Project:

- Project Name
- Start Date and/or Finish Date
- Schedule, work days, times, hours per day, exceptions
 - (e.g. M-F, 10 hours per day, 7-6, holidays or non-working days)
- Resources (people, equipment, material)
 - As much detail as needed for how Microsoft Project (MSP) will be used.
 - If scheduling only, you don't need hourly rates for each person or rental equipment or cost for material (steel, concrete).
 - o Good to have schedules and availability of each person.
- Detailed task list with duration of each task and Predecessors

2.0 Create a New Project

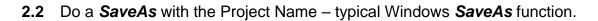
2.1 Open MS Project.

From the Opening Screen, click (1) *New*, then (2) *Blank Project*. (If MS Project is already open, click *File*, *New*, *Blank Project*.)

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The screen should look like this:

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3.0 Set the Project Schedule Information

3.1 Project Start Date

Click (1) *Project* tab, (2) *Project Information* icon, then (3) **Start Date.** Select and click on your desired project start date.

(On some projects you might want to begin with the desired Finish Date and work backwards to develop a schedule – in that case, you would select Finish date here, directly below Start date.)

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Optional: While you're on this menu, if you want to use one of the default MSP Calendars (Standard, Night Shift, or 24 Hours) or a Calendar you have previously created as the **Project Work Calendar**, you can select your desired calendar in the (4) **'Calendar'** dropdown. If you want to create your own calendar for this project, we'll cover that next.

Click (5) OK when you're done.

Your Gantt chart will now have a dotted vertical line at the date you selected and your tasks will default to the start date you entered.

Note: Do not skip these steps and jump to entering project tasks. Otherwise, you will be back here when your durations and dates are not correct.

3.2 Set Project Work Calendar

Note: This step creates and sets a new Work Calendar and schedule for the project. This example sets the work calendar and schedule for a 10-hour work schedule. (If you're using one of the default calendars or one you've saved before, you can skip any of the following steps you don't need to change.)

3.2.1 Open the Change Working Time screen Click (1) *Project*, then (2) *Change Working Time*. The Change Working Time screen will be displayed.

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- **3.2.2** Create the custom 10-hour day calendar Click on (1) *Create New Calendar*.
 - (2) Select 'Make a copy of and pick a calendar to copy.
 - (3) Type a *Name* for the new calendar. (For this example, I used "10 *Hour Day, M-F, 7-6.*"

The screen will look like this:

Change Working Time		×
For <u>c</u> alendar: Standard Calendar 'Standard' is a	base calendar.	Create <u>N</u> ew Calendar
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Name	Cancel	D <u>e</u> tails
Help	O <u>p</u> tions	OK Close

(4) Click *OK*. That brings you back to the *Change Working Time Calendar* screen.

3.2.3 Set the work hours for the new calendar

Make sure your new calendar name ("10 Hour Day, M-F, 7-6" in example) is in the (*) 'For calendar:' dropdown over the next several steps.

(1) Select the 'Work Weeks' tab. The 'Details' button should be available (ungrayed) now.

(2) Click on 'Details.'

Change Working Time X										
For <u>c</u> alendar: 10 Hour Day, M-F,							~		Create <u>N</u> ew Calendar	
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31 Exception day	23	24	25	26	27	28	29			
31 Nondefault work week	30	31								
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Name					s	tart		Finish	Details 2	
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Help								Options	OK Cancel	

- Working Days select each day (or highlight multiple using Shift or Ctrl keys) and set the project work time for each day.
 - (1) Select day(s): Monday Friday and (2) Set days(s) to these specific working times:
 - Then (3) enter the 'From' and 'To' times. In the example shown, I show a work day from 7-12, then 1-6 after an hour break.

Details for '[Default]				×
Set working time for	r this work	week		
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Saturday Sunday		7:00 AM 1:00 PM	12:00 PM 6:00 PM	
	-			
]
<u>H</u> elp		C	OK	Cancel

- Non-Working Days
 - (1) Select day(s): Saturday Sunday and (2) 'Set days to nonworking times.'

Details for '[Default]'				×
Set working time for t	his work v	veek		
S <u>e</u> lect day(s): Monday Tuesday Wednesday	O Set d	ays to <u>n</u> onv	working tim	r these days. working times:
Thursday Friday Saturday Sunday	1	From	То	
Help			ок 3	Cancel

Go back and review each day, <u>one at a time</u>, to make sure you got what you wanted for each day. Once you're satisfied, (3) click OK.

If you leave the screen too soon, click the Details button again.

- Exceptions

- (1) Select the *Exceptions* tab, then (2) enter your holidays and other nonworking days. Click on each cell to enter the text and dates.
- (3) Click **OK** when you're done.

Change Working Time								×							
For <u>c</u> alendar: 10 Hour Day, M-F Calendar '10 Hour Day, M-F,' is a		e cal	~	Create <u>N</u> ew Calendar											
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	9	10	11	12	13	14	15	Based on:							
On this calendar:	16	17	18	19	20	21	22	Default work week on calendar							
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3.2.4 Select the new calendar for the project.

IMPORTANT STEP - You created the calendar in the previous step; now you have to select that calendar for the project. Click on (1) Project, (2) Project Information, then in the Calendar dropdown, (3) select your new calendar, and (4) click OK.

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At this point, we have created and selected a new calendar for the project.

3.3 Set the default task times

Note: This is the start and stop times for <u>new tasks</u>. Here we make this match the project work schedule set up previously.

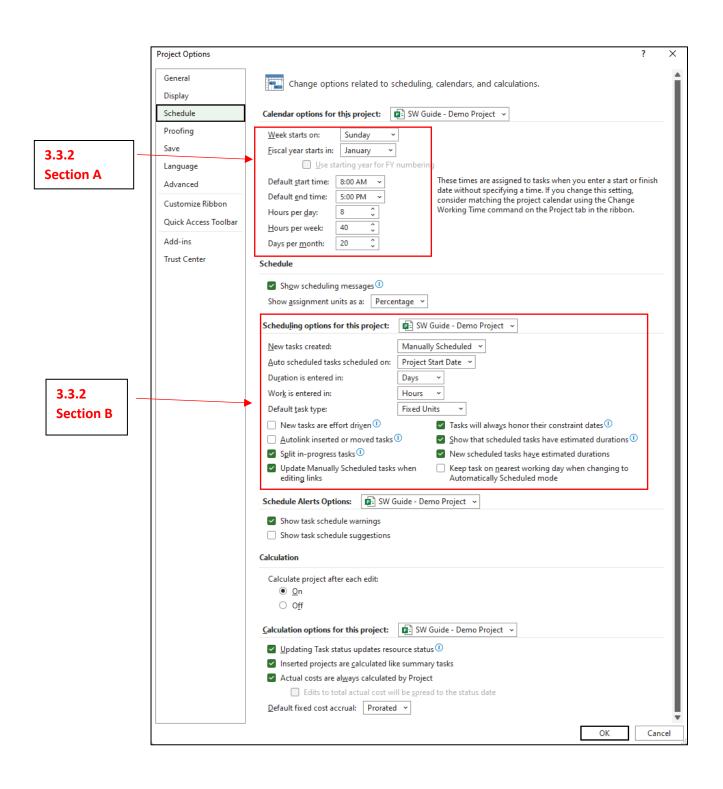
3.3.1 Project Options, Schedule screen

Click (1) Project tab, (2) Change Working Time, (3) Options button.

(Alternatively Click *File*, *Options*, then *Schedule*.)

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The screenshot on the next page shows the Schedule screen with MS Project defaults.



3.3.2 Set Task Options

Your choices here will set the options for the **TASKS** you will enter in future steps. In this example, I set the default Task Start/Stop times to match the Project schedule we created in 3.2.

A. Set Task Calendar Options

Click on each dropdown shown below (and in the top red box in the figure on page 11) and set your expected project work schedule.

Week starts on:	Monday ~
Fiscal year starts in:	January 👻
Use st	arting year for FY numbering
Default <u>s</u> tart time:	7:00 AM 🗸 🗸
Default end time:	6:00 PM 🗸 🗸
Hours per <u>d</u> ay:	10 🗘
Hours per week:	50 🗘
Days per <u>m</u> onth:	20 🗘

In the example above, I set the week start day to Monday, a 10-hour workday from 7-6 (1 hour of break time), so 50 hours per week.

B. Set scheduling options for new TASKS.

Click on each dropdown shown below (and in the bottom red box in the figure on page 11) and set your preferred options for new tasks.

Scheduling options for this project:	😰 SW Guide - Demo Project 👻
New tasks created:	Auto Scheduled ~
Auto scheduled tasks scheduled on:	Project Start Date ~
Duration is entered in:	Days ~
Wor <u>k</u> is entered in:	Days ~
Default <u>t</u> ask type:	Fixed Duration 👻
\Box New tasks are effort driven \oplus	Tasks will always honor their constraint dates 1
Autolink inserted or moved tasks	Show that scheduled tasks have estimated durations
Split in-progress tasks 🛈	New scheduled tasks have estimated durations
 Update Manually Scheduled tasks editing links 	when Keep task on <u>n</u> earest working day when changing to Automatically Scheduled mode

In the example above, I made the following choices:

- New tasks created: Auto Scheduled When you first enter a new task, the initial start date will be the Project Start Date. Once you start adding predecessors, the date will be adjusted. This setting can be changed for each task later – setting this here just establishes the project default.
- Auto Scheduled tasks scheduled on: Project Start Date this can be set to Current Date. Your call.
- **Duration is Entered In: Days** The choice you make here sets the project default for how you will enter duration for each task later. I chose 'Days' here for the demo. You can do hours, weeks, etc.
- Work is entered in: Days This is the project default for new tasks.
- Default Task Type: Fixed Duration Choices here are Fixed Units, Fixed Duration, and Fixed Work. Choosing Fixed Duration means that the duration of the task does not change, even if you change the resources assigned.

After making the changes below, click OK to leave this screen.

If you got here from the Project Information Pop-up window, click OK on that screen as well.

4.0 Assign Project Resources

Next, we'll add Resources to the project. In this example, I'll add some mechanics, electricians, subcontractors, materials, equipment...

Note: At this point, we're moving around in MSP enough that it will be easy to get "lost" in the menus. There are several ways to get to each menu/screen. For example, the next step takes you to the Resource Sheet; there are multiple ways to get there.

Pull up the Resource Sheet.

Click on (1) View, (2) the bottom half of the Gantt Chart button, then (3) More Views.

In the Views dropdown, scroll down to (4) highlight Resource Sheet. (5) Click Apply.

9	🚹 📙 SW Demo Trial 1 File Task Resource	- Project Professional e Report Project	View Help	Gantt Cha	rt Format	♀ Tell me wha	t you want to do	
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	✓ <u>G</u> antt Chart Tracking Ga <u>n</u> tt	ask Name 👻	Duration 👻	Start 👻	Finish 👻	Predecessors 👻	Resource Names 🔻	Add New Column 👻
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The Resource Sheet will be displayed. (You could also have clicked on View, Resource Sheet, then checked the box by Resource Sheet.)

4.1 Assign Resources

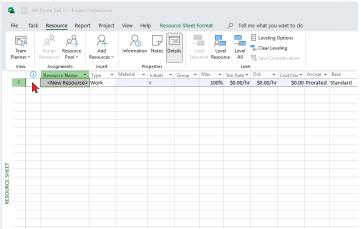
(1) Click the **Resource** tab, (2) the **Add Resources** button, then (3) the resource type you want to add first: (A) **Work Resource**, (B) **Material Resource**, or (C) **Cost Resource**.

SW Demo Trial 1 - Project File Task Resource Repo		ource Sheet Format	
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View Assignments	Build Team from Enterprise		Level
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	Address <u>B</u> ook	of equip	ment that performs work to
	Material Resource		Material Resource Add a material resource. A material resource is a consumable
	Cost Resource C		material or supply such as concrete or nails. When assigning a material resource to a task, use the units field to indicate how much of the material resource is needed.
RESOURCE SHEET		Cost Resource Add a cost resource to ass independent costs with a For example, an airfare co resource could be assigne to track the money spent tickets for that task.	task. st d to a task

A. <u>Work</u> Resources

1. **Double-click** anywhere on the row to pull up the *Resource Information* window.

(Alternatively, you can add/edit resources directly on the Resource Sheet.)



- 2. In the *Resource Information* window, enter the information below for the new resource (example text in blue):
 - (1) Resource Name Mech # 1
 - (2) Initials M
 - (3) Group (optional) Mechanical
 - (4) Click Change Working Time to set the working schedule for this resource.
 - (5) In the Base Calendar dropdown, select the calendar for this resource I chose the 10 Hour Day, M-F, 7-6 calendar, assuming Mechanic # 1 is working the same schedule as the project schedule.
 - (6) Click OK to close the Change Working Time window.

Resource Information	×	
General Costs Notes Custom Fields		Change Working Time
Resource game: Egait Jogon Account Booking type Cosmitted	Initials: <n 2<br="">Group: Mechanical 3 Coge: Jppe: Work Mategial label: Inactige Change Working Time 4</n>	Resource calendar for '< New Resource >1: Base calendar: 10 Hour Day, M.F, 7.6 V Source calendar: Source calendar: Nonworking Source calendar: Nonworking 12 6 died working hours on this calendar: M M M Nonworking 10 11 12 14 15 13 Edited working hours on this calendar: 9 10 11 12 14 15 14 Exception day 12 24 25 27 28 29 29
Reb	Dgtailis OK Cancel	1 Nondefault work weeks 20 31

Help

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- 3. Enter Cost information for this new resource.
 - (1) Click on the Costs tab, then (2) enter a cost for this resource. I put \$25/h for Standard and \$37.50/h for Overtime Rate. You can also do costs per day, week, month. etc.

Resource Information	×
General Costs Notes Custom Fields	
Resource Na Mech # 1	
<u>C</u> ost rate tables	
For rates, enter a value or a percentage increase or decrease from the previous rate. For instance, if a resource's Per Use Cost is reduced by 20%, type -20%.	
A (Default) B C D E	
Effective Date Standard Rate Overtime Rate Per Use Cost	
\$25.00/h \$37.50/h \$0.00	
<u> </u>	
Cost <u>a</u> ccrual: Prorated V	
Help Details OK 3 Ca	ncel

- There is a Notes tab if you want to add notes for this resource (e.g., "Mechanic # 1 is not available on date...") as well as a Custom Fields tab where you can add fields. This example does not use these tabs.
- Click (3) OK to close the Resource Information window.

The Resource Sheet will show the new resource, as shown below.

	()	Resource Name	Туре	Material 🖣	Initials 🔻	Group	Max. 👻	Std. Rate 🔻	Ovt. 👻	Cost/Use ▼	Accrue At	▼ Base Calendar ▼
1		Mech #1	Work		<m></m>	Mechanical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,
2												

Note: You can double-click any row on the Resource Sheet to go back and edit the task information.

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4. Repeat the above steps to add additional Work resources for the project. *MSP allows you to copy and paste resources – just remember to update each resource name.*

The figure below show the Work resources I added to the example. Note that Equipment is also included as a Work resource.

	(Resource Name	-	Туре	-	Material	 Init 	ials	-	Group	- 1	Max. 👻	Std. Rate 💌	Ovt. 👻	Cost/Use ▼	Accrue At	-	Base Calendar	*	Code
1		Mech #1		Work			<m< td=""><td></td><td></td><td>Mechanical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, M</td><td>I-F, '</td><td></td></m<>			Mechanical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, M	I-F, '	
2		Mech # 2		Work			<m< td=""><td></td><td></td><td>Mechanical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, N</td><td>I-F, '</td><td></td></m<>			Mechanical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	
3		Mech # 3		Work			<m< td=""><td></td><td></td><td>Mechanical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, N</td><td>I-F, '</td><td></td></m<>			Mechanical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	
4		Mech #4		Work			<m< td=""><td></td><td></td><td>Mechanical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, N</td><td>I-F, '</td><td></td></m<>			Mechanical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	
5		Elect #1		Work			<e< td=""><td></td><td></td><td>Electrical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, N</td><td>I-F, '</td><td></td></e<>			Electrical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	
6		Elect # 2		Work			<e< td=""><td></td><td></td><td>Electrical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, M</td><td>I-F, '</td><td></td></e<>			Electrical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, M	I-F, '	
7		Elect # 3		Work			<e< td=""><td></td><td></td><td>Electrical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, M</td><td>I-F, '</td><td></td></e<>			Electrical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, M	I-F, '	
8		Elect #4		Work			<e< td=""><td></td><td></td><td>Electrical</td><td></td><td>100%</td><td>\$25.00/hr</td><td>\$37.50/hr</td><td>\$0.00</td><td>Prorated</td><td></td><td>10 Hour Day, M</td><td>I-F, '</td><td></td></e<>			Electrical		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated		10 Hour Day, M	I-F, '	
9		Manlift # 1		Work			ML			Rental Eqpt.		100%	\$166.67/day	\$0.00/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	
10		Scissor Lift #1		Work			SL			Rental Eqpt.		100%	\$133.33/day	\$0.00/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	
11		Detailer		Work			D			Shop		100%	\$50.00/hr	\$75.00/hr	\$0.00	Prorated		10 Hour Day, N	I-F, '	

Bridge Technical Services Notebook Series

B. Material Resources

Material Resources includes consumables (steel, concrete, paint, etc.).

Click **Resource**, then **Add Resources**, then **Material Resource** – A new line is added below with '**Material**' in the '**Type**' column. This is similar to how we added the previous resource type.

- 1. **Double-click** anywhere on the new row to edit details. Enter the information below for the new resource (example text in blue):
 - (1) Resource Name Steel.
 - (2) Initials Stl.
 - (3) Material Label Tons (This will be the units for this material.)
 - (4) Click the *Costs* tab and (5) enter the cost per unit \$90.
 - (6) Click OK to close the *Resource Information* window window.

				✓ Materia								Cost/Usi▼ A		Base Calendar	• Code •	Add New Column	1 ×		
1	Mech		Work		<	м	Mechan	ical	100	% \$25.00	/hr \$27 50/h			10 Hour Day, M-I	,				
2	Mech	n # 2	Work	Resource Infor	mation							×	orated	10 Hour Day, M-I	, ·				
3	Mech	n # 3	Work	General Cos	ts Not	tes Cust	tom Fields						prated	10 Hour Day, M-	, i				
4	Mech	n#4	Work										prated	10 Hour Day, M-	5				
5	Elect	#1	Work	Resource name	e:	Steel			_	Initials:	<sti 2<="" td=""><td></td><td>prated</td><td>10 Hour Day, M-I</td><td>,</td><td></td><td></td><td></td><td></td></sti>		prated	10 Hour Day, M-I	,				
6	Elect	#2	Work	E <u>m</u> ail:			5			Group:	<u> </u>		prated	10 Hour Day, M-I	5				
7	Elect	#3	Work	Logon Accou	int					Co <u>d</u> e:			prated	10 Hour Day, M-	-, ·				
8	Elect	#4	Work	Booking type:	[Committe	ed		~ 1	Iype:	Material	~	prated	10 Hour Day, M-I	, ·				
9	Manl	lift #1	Work						i	Material label:	Tons 3		prated	10 Hour Day, M-	v .				
10	Scisso	or Lift #1	Work								Gener	Budget	prated	10 Hour Day, M-	5				
11	Detai	iler	Work	Default Assign	ment <u>O</u> v						Inactive		prated	10 Hour Day, M-I	,				
12	<new< td=""><td>v Resource></td><td>Mate</td><td>Resource Avail</td><td>ability</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>prated</td><td></td><td></td><td></td><td></td><td></td><td></td></new<>	v Resource>	Mate	Resource Avail	ability								prated						
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18														source Nar Steel					
19								 						esource <u>N</u> ar Steel					
18 19 20														esource <u>N</u> ar Steel ost rate tables For rates, enter a value	e or a percentage i	ncrease or decrease	from the previou	5	
19 20 21				Help						Details	ОК	Cancel		ost rate tables	e or a percentage i resource's Per Use	ncrease or decrease Cost is reduced by	from the previou 20%, type -20%.	5	
19 20 21 22				Help						Dgtails	ОК	Cancel		esource <u>N</u> ar Steel ost rate tables For rates, enter a value	e or a percentage i resource's Per Use C D	ncrease or decrease Cost is reduced by E	from the previou 20%, type -20%.	5	
19 20 21 22 23				Help						Dgtails	ОК	Cancel		source Nation Steel ost rate tables For rates, enter a value rate. For instance, if a A (Default) B	resource's Per Üse C D	Cost is reduced by	20%, type -20%.	5	
19 20 21 22 23				Help						Dgtails	ОК	Cancel		source Nation Steel ost rate tables For rates, enter a value rate. For instance, if a A (Default) B	resource's Per Use	Cost is reduced by	from the previou 20%, type -20%. Per Use Cost \$0.00	5	
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19 20 21 22 23 24 25 26				Help						Dgtails	ОК	Cancel		source Nation Steel ost rate tables For rates, enter a value rate. For instance, if a A (Default) B	C D Standard Rate	Cost is reduced by	20%, type -20%. Per Use Cost	s	
19 20 21 22 23 24 25 26 27				Help						Dgtails	ОК	Cancel		source Nation Steel ost rate tables For rates, enter a value rate. For instance, if a A (Default) B	C D Standard Rate	Cost is reduced by	20%, type -20%. Per Use Cost	s	
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19 20 21 22 23 24 25 26 27 28 29										Dgtails		Cancel		source Nation Steel ost rate tables For rates, enter a value rate. For instance, if a A (Default) B	resource's Per Üse C D Standard Rate 590.00 5	Cost is reduced by	20%, type -20%. Per Use Cost	s	
19 20 21 22 23 24 25 26 27 28 29														source Nat Steel S	resource's Per Üse C D Standard Rate 590.00 5	Cost is reduced by	20%, type -20%. Per Use Cost	5	
19 20 21 22 23 24 25 26 27 28						· · ·								source Nat Steel S	resource's Per Üse C D Standard Rate 590.00 5	Cost is reduced by	20%, type -20%. Per Use Cost	s	

2. Repeat the above steps to add additional Work resources for the project.

The figure below shows the combined Work and Material resources we've added so far. The Material Resources we just added are at the bottom.

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6	Resource Name	Type 🔻	Material 👻	Initials 🔻	Group	Max. 👻	Std. Rate 🔻	Ovt. 👻	Cost/Use ▼	Accrue At	 Base Calendar 	0
1	Mech #1	Work		М	Mechanical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
2	Mech # 2	Work		М	Mechanical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
3	Mech # 3	Work		М	Mechanical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
4	Mech #4	Work		М	Mechanical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
5	Elect #1	Work		E	Electrical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
6	Elect # 2	Work		E	Electrical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
7	Elect # 3	Work		E	Electrical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
8	Elect #4	Work		E	Electrical	100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	10 Hour Day, M-F,	
9	Manlift # 1	Work		ML	Rental Eqpt.	100%	\$166.67/day	\$0.00/hr	\$0.00	Prorated	10 Hour Day, M-F,	
0	Scissor Lift #1	Work		SL	Rental Eqpt.	100%	\$133.33/day	\$0.00/hr	\$0.00	Prorated	10 Hour Day, M-F,	
1	Detailer	Work		D	Shop	100%	\$50.00/hr	\$75.00/hr	\$0.00	Prorated	10 Hour Day, M-F,	
12	Steel	Material	Tons	Steel			\$90.00		\$0.00	Prorated		
13	Concrete	Material	Cu. Yard	Concrete			\$125.00		\$0.00	Prorated		

C. Cost Resources

Cost Resources are costs that are not directly related to the amount of work or material on a task. Cost Resources can include costs like travel, food, meetings, training, etc. The example creates a Cost Resource called Training, where Training costs can be captured in the project in the future.

- As before, click *Resource*, then *Add Resources*, then *Cost Resource* – a new resource line will be added. Double-click to bring up the *Resources Information* dialog window. Enter the information below for the new resource (example text in blue):
 - (1) Resource Name Training.
 - (2) Initials T.
 - (3) Click OK to save and close the window.

		i Resource Name	Туре 🔻	Material	▼ Initials ▼	Group	→ Max. → S	itd. Rate 🔻 Ovt. 👻 Cost/Use	Accrue At	▼ Base Calendar ▼ Code
	1	Mech #1	Work		M	Mechan	Resource Information			×
	2	Mech # 2	Work		M	Mechan				^
	3	Mech # 3	Work		M	Mechan	General Costs No	otes Custom Fields		
	4	Mech #4	Work		M	Mechan	Resource <u>n</u> ame:	Training 1	Initials:	т 2
	5	Elect #1	Work		E	Electrica	Email:		-	
	6	Elect # 2	Work		E	Electrica			Gro <u>u</u> p:	
	7	Elect # 3	Work		E	Electrica	Logon Account		Co <u>d</u> e:	
	8	Elect #4	Work		E	Electrica	Boo <u>k</u> ing type:	Committed \checkmark	<u>T</u> ype:	Cost ~
	9	Manlift #1	Work		ML	Rental E			Material label:	
	10	Scissor Lift #1	Work		SL	Rental E	Defectly Anderson and O			Generic Budget
	11	Detailer	Work		D	Shop	Default Assignment <u>O</u>	when:		Inacti <u>v</u> e
	12	Steel	Material	Tons	Steel		Resource <u>A</u> vailability			
	13	Concrete	Material	Cu. Yard	Concrete		Available Fro	om Available To Units		Change Working Time
	14	<new resource<="" td=""><td>> Cost</td><td></td><td><</td><td></td><td>· · · · · · · · · · · · · · · · · · ·</td><td></td><td></td><td></td></new>	> Cost		<		· · · · · · · · · · · · · · · · · · ·			
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RESOURCE SHEET										
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							Truk		D Cturisiii	

2. Repeat the above steps to add additional Cost resources for the project.

5.0 Add Tasks

Next, we'll add the tasks to the project.

For this example, the work is broken out in these groups:

- Structural Steel
 - o Platform 1
 - o Platform 2
- Dust Collection
 - Ducting
 - Collection Hoods
- Foundations
 - Foundation # 1
 - Foundation # 2
- New Equipment
 - Equipment # 1
 - Equipment # 2
- Piping
- Material Conveying Lines
- Fire Protection
- Startup Assistance

The tasks will look very similar to the above when entered into Project.

Options

There are a couple ways you can enter tasks: (5.1) type or paste them directly into the timeline or (5.2) use the *Task*, *Summary*, and *Milestone* buttons.

5.1 Type directly into the timeline.

(I'm starting with this method because I usually end up pasting the task list into MS Project from another program. See section 5.2 below for the more structured MS Project approach.)

Click (1) the *View* tab, (2) the bottom half of the *Gantt Chart button*, then (3) *More Views*.

In the pop-up window, (4) scroll down and select *Gantt with Timeline*, then (5) *Apply*.

6	L E	SW (Task	Guide - Dem Resource	o Project - Project Profess e Report Project	View Helr	Gantt Cha	rt Format	, Поред Стен и	ne wha	t you want to do											
	Gantt Chart \ Buil	Usage	k Task	Network Diagram	Team Planner ~	Resource U Resource S C Other View Resource Views	heet ~	A Z Sort Outline	Table		No Filter] ~ Day		e:		Zoom Zoom		e Selec t Tas	ted		fimeli Detail:	Split View
TIMELINE		<u>G</u> antt C Tracking									Add	tas	ks v	vith	dates	s to t	he tin	neline	9		
	E	Save V <u>i</u> e More Vi	iews	ask Name 👻	Duration 🗸	Start 👻	Finish		5 🔻	Resource Names 🔻	Add New Column 👻	F	S	S	Dec 2 M		TF	S		Jan 2 M	, '23 T W T
		3	Show the l	vs More Views dialog box to he available views.																	
						More Views Views: Backlog Boar Backlog Shee Bar Rollup Calendar	et		<u>N</u> er <u>E</u> di	=											
CHART						Current Sprir Current Sprir Descriptive N Detail Gantt Gantt Chart <u>Gantt with T</u> Leveling Gan	nt Sheet letwork Diagi imeline	ram	<u>C</u> or <u>O</u> rgar												
GANTT CHART								Apply 5	Car	ncel											

5.1.1 In the Task Name column, start typing in the tasks/events:

- Customer PO Received (used as the event to start other tasks)
- Structural Steel (which will have 2 platforms)
- Platform 1
- Detailing
- Review and Approval
- Order
- Fabrication
- Installation

(I am not entering task Durations at this point.)

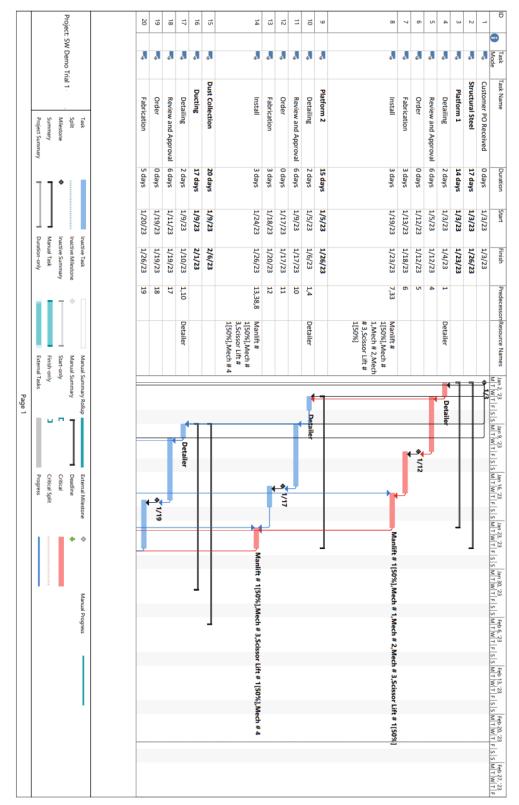
The Task Mode will default to 'Automatically Scheduled' and the Start date will default to the Project Start date, because we selected those options in the New Task setup previously.

	Tue 1,										
	i	Task Mode ▼	Task Name	•	Duration	•	Start 👻	Finish 👻	Predecessor	5 👻	Resource Names
1		- ⇒	Customer PO Received		1 day?		Tue 1/3/23	Wed 1/4/23			
2		□ →	Structural Steel		1 day?		Tue 1/3/23	Wed 1/4/23			
3		□ →	Platform 1		1 day?		Tue 1/3/23	Wed 1/4/23			
4			Detailing		1 day?		Tue 1/3/23	Wed 1/4/23			
5		⇒	Review and Approval		1 day?		Tue 1/3/23	Wed 1/4/23			
6			Order		1 day?		Tue 1/3/23	Wed 1/4/23			
7		→	Fabrication		1 day?		Tue 1/3/23	Wed 1/4/23			
8		□ →	Install		1 day?		Tue 1/3/23	Wed 1/4/23			

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Pages 25 – 40 are available in the purchased download.

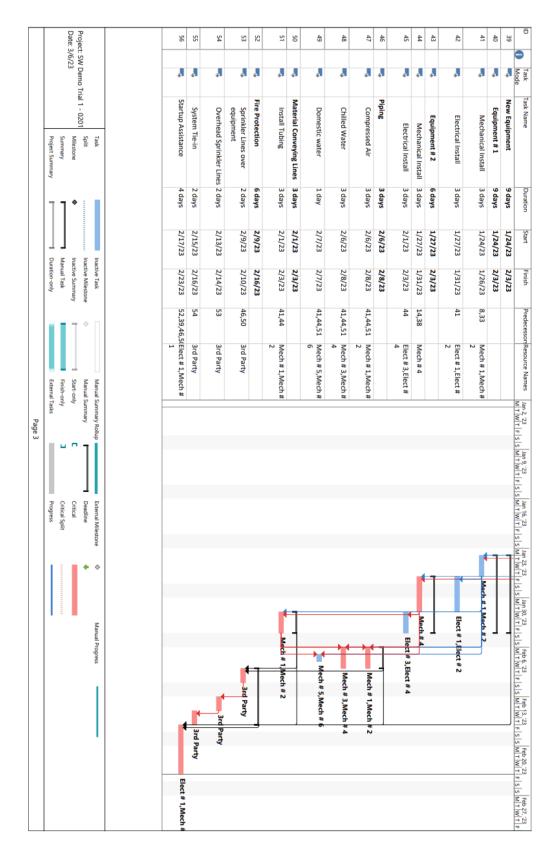
APPENDIX 1



The following pages show the final schedule, with the Critical Path highlighted in red.

				-	_											_				_	_			∎
				Project		8	37	36	3	34	x	32	3	ø	29	28	27	26	25	24	23	22	21	
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				a 1			_			Fo					Fo	Foun	_					0	_	Task Name
	\vdash				_	Concre	Pour C	Forms,	Layout	Foundation # 2	Concre	Pour C	Forms,	Layout	Foundation # 1	Foundations	Install	Fabrication	Order	Review	Detailing	llectio	Install	ame
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	Project Summary	Y	ลี			Concrete Cure Time	e				Concrete Cure Time	e								Review and Approval		s		
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						1/9	1/6	1/4	1/3	1/3	1/9	1/6	1/4	1/3	1/3	1	2/2	1/2	1/2	1	1/1	1	1/2	Start
			=		-	1/9/23	1/6/23	1/4/23	1/3/23	1/3/23	1/9/23	1/6/23	1/4/23	1/3/23	1/3/23	1/3/23	2/2/23	1/24/23	1/23/23	1/13/23	1/11/23	1/11/23	1/27/23	1
	Duration-only	Manual Task	Inactive Summary	hactive N	Inactive Task	1/1	1/6/23	1/5/23	1/3/23	1/1	1/1	1/6/23	1/5/23	1/3/23	1/1	1/1	2/6/23	1/3	1/2	1/23/23	1/1	2/6/23	2/1/23	Finish
	only	ask	ummary	Inactive Milestone	ask	1/17/23	/23	/23	/23	1/17/23	1/17/23	/23	/23	/23	1/17/23	1/17/23	/23	1/30/23	1/23/23	3/23	1/12/23	/23	/23	5
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	8	Fin	- Sta	Ma	Ma		Mech # 4,Mech # 5	Mech # 4,Mech # 5	Mech # 4,Mech # 5			Mech # 1,Mech # 2	Mech # 1,Mech # 2	Mech # 1,Mech # 2			Manlift # 1[50%],Scissor Lift # 1[50%],Mech # 5,Mech # 6				1		Manlift # 1[50%],Scissor Lift # 1[50%],Mech # 5,Mech # 6	e Name
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				•													Maniift # 1 50%],Scissor Lift # 1 50%],		1/23				Manint # 1[50%],5cissor Litt # 1[50%],Meeth # 5,M	23 T E I S I S M T W T E S S M T W T W T E S S M T W T E S S M T W T W T E S S M T W T
				•													Maniift # 1[50%],Scissor Lift # 1[50%],Mech #		1/23				Maniitt # 1[50%],Scissor Litt # 1[50%],Mech # 5,Mech # 6	23 T E S S M T W T E S S S M T W T E S S M T
				•													Manlitt # 1[50%],Scissor Lift # 1[50%],Mech # 5.Mec		√ 1/23				, Manuitt # 1 50%],Scissor Litt # 1 50%],Mech # 5,Mech # 6	Jan 2, 23 M T W T F I S I S M T W T F I S I S M T W T F I S I S M T W T F I S I S M T W T F I S S M T W T W T F I S S M T W T W T F I S S M T W T W T W T W T W T W T W T W T W T

APPENDIX 1



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