

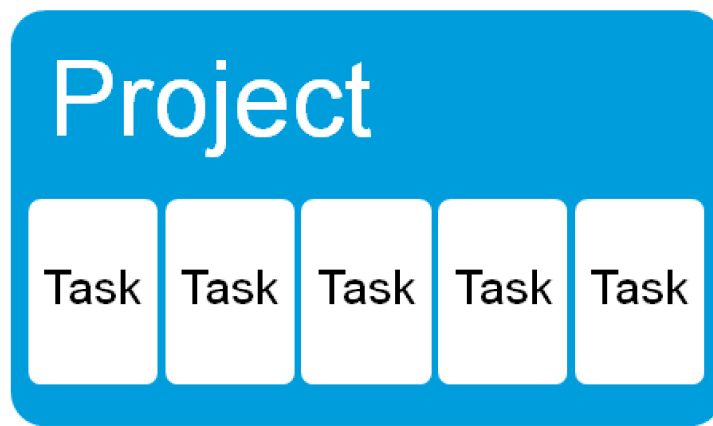
# TOPIC A

## Add Tasks to a Project Plan

Once you have created a Microsoft Project file, you must update it with detailed information about your project. In this topic, you will enter the tasks that must be performed to complete the project.

### Tasks

A *task* is a specific item of project work. In other words, tasks are the building blocks of effort that need to be done to execute the project. In Microsoft Project, you can use tasks to break a project into manageable pieces of work. You can schedule the duration and sequence of tasks in Project, and assign resources (people or materials) who will perform the tasks.




*Figure 3-1: Project tasks are the building blocks of a project plan.*

### Task Modes

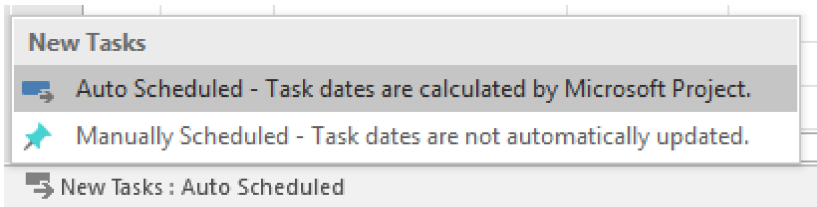
Tasks can be entered manually or automatically based on the task information available for your project.

<i>Task Mode</i>	<i>Description</i>
<i>Manually Scheduled</i>	Manual mode is the default task mode in Project. It is also known as user-controlled scheduling. This mode enables you to have complete control over the task duration and the start and finish dates. Once a task is entered, these fields are blank and can be populated once the information is known. This mode can be extremely helpful at the beginning stages of creating a project plan when specific task information is not confirmed, but you still want to capture the task in the plan. Manually scheduled tasks are marked with the pushpin icon in the <b>Task Mode</b> field of the Gantt chart. In this mode, when you enter a task, the default duration is left blank.

	<p><b>Note:</b> The default task mode can be changed at any time during a project’s life cycle at the task level, the project level, or even at the application level by configuring the Project options.</p>
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<b>Task Mode</b>	<b>Description</b>
<b>Auto Scheduled</b>	Auto scheduled mode can be turned on in Project from the <b>Task</b> tab for new tasks or by using the <b>Task mode</b> drop-down menu to switch the mode of an existing task. This mode enables Project to automatically schedule the task for you based on dependencies, constraints, calendars, and other factors. Automatically scheduled tasks are marked with the Gantt bar icon in the <b>Task Mode</b> field of the Gantt chart. In this mode, when you enter a task, the default duration is populated with a default of <b>1 day</b> ?

You can select the **New Tasks** button on the status bar to change whether new tasks are manually or auto scheduled. Use the buttons on the **Task** tab of the ribbon to change whether existing tasks are manually or auto scheduled.



**Figure 3-2:** You can easily switch between manually scheduled and auto scheduled tasks.

## The Task Entry Table

You are already familiar with the **Gantt Chart** view. This view contains the **Task Entry table**, which is the main area in Microsoft Project from which to view, enter, and modify tasks. The **Task Entry** table works very much like other table-based screens. If you have worked with tables in Excel or other programs, you will find similar functionality in Microsoft Project.

	<b>Task Mode</b>	<b>Task Name</b>	<b>Duration</b>	<b>Start</b>	<b>Finish</b>
0		<b>My HR Manual WBS</b>	<b>71 days</b>	<b>Mon 8/3/20</b>	<b>Wed 11/11/20</b>
1		1 Begin Project	0 days	Mon 8/3/20	Mon 8/3/20
2		<b>2 Research Phase</b>	<b>4 days</b>	<b>Mon 8/3/20</b>	<b>Thu 8/6/20</b>
3		2.1 Review Existing HR Manual	1 day	Mon 8/3/20	Mon 8/3/20
4		2.2 Review Common Industry Practices	1 day	Tue 8/4/20	Tue 8/4/20
5		2.3 Review Government Regulations	2 days	Tue 8/4/20	Wed 8/5/20
6		2.4 Interview Department Heads	1 day	Thu 8/6/20	Thu 8/6/20
7		<b>3 Outline Phase</b>	<b>7 days</b>	<b>Fri 8/7/20</b>	<b>Mon 8/17/20</b>
8		3.1 Create Outline	3 days	Fri 8/7/20	Tue 8/11/20
9		3.2 Review with Legal Department	1 day	Wed 8/12/20	Wed 8/12/20
10		3.3 Review with Department Heads	2 days	Thu 8/13/20	Fri 8/14/20

**Figure 3-3:** You will build the basic structure of your project plan in the Task Entry table.

In the left pane of the **Gantt Chart** view, you will see the **Task Entry** table, which contains the following project information in columns from left to right.

<b>Column</b>	<b>Description</b>
<b>Row Number</b>	The row in the Gantt chart. This number corresponds to the <b>Task ID</b> of the task in that row.

<b>Column</b>	<b>Description</b>
<b>Indicators</b>	Little icons that show the status of the tasks, help, and error information. For example, if a task contains a note, this column will show a note indicator.
<b>Task Mode</b>	Shows whether the task is manually or auto scheduled.
<b>Task Name</b>	A brief description of the work. Short, action-oriented task names are best (for example, "Design logo").
<b>Duration</b>	How long the task will take in working time, not calendar time. By default, Microsoft Project uses days as the unit of time for durations. However, if you wish, you can specify minutes, hours, weeks, or months as the unit of time.
<b>Start</b>	The date when the task is planned to begin.
<b>Finish</b>	The date when the task is planned to be completed.
<b>Predecessors</b>	The <b>Task ID(s)</b> of tasks on which this task is dependent to complete.

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## Task Editing

It is possible that the tasks in your project will change. You can edit your task list in several ways:

- Edit text in a cell of the **Task Entry** table.
- Move a task to another location in the project plan.
- Copy a task.
- Adjust the column width or row height in the **Task Entry** table.
- Insert a task between two other tasks.
- Delete a task from the project plan.
- Undo a mistake.

## The Task Information Dialog Box

In the **Gantt Chart** view, whenever you open a task, the *Task Information dialog box* opens. This dialog box contains all the information about the task, grouped into six tabs. The **General** tab displays the task's **Name**, **Duration**, **Schedule Mode**, **Start Date**, and **Finish Date**—which correspond to several of the columns in the **Task Entry** table.

Figure 3-4: The Task Information dialog box contains data about a task.

Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Add and Edit Tasks in a Project Plan.

## Recurring Tasks

A **recurring task** is a task that occurs repeatedly at regular intervals during the course of a project. A recurring task appears as a summary task with multiple subtasks that represent each occurrence of the task. They are identified by the recurring task indicator icon, which appears to the left of the task in the **Indicators** column. A recurring task can be inserted in the project at any point in a project cycle.

		Task Mode ▾	Task Name ▾	Duration ▾	Start ▾	Finish ▾
1			Begin Project	0 days	Mon 8/3/20	Mon 8/3/20
2			Project Status Meeting	68.75 days	Tue 8/4/20	Tue 11/10/20
3			Project Status Meeting 1	2 hrs	Tue 8/4/20	Tue 8/4/20
4			Project Status Meeting 2	2 hrs	Tue 8/18/20	Tue 8/18/20
5			Project Status Meeting 3	2 hrs	Tue 9/1/20	Tue 9/1/20
6			Project Status Meeting 4	2 hrs	Tue 9/15/20	Tue 9/15/20
7			Project Status Meeting 5	2 hrs	Tue 9/29/20	Tue 9/29/20
8			Project Status Meeting 6	2 hrs	Tue 10/13/20	Tue 10/13/20
9			Project Status Meeting 7	2 hrs	Tue 10/27/20	Tue 10/27/20
10			Project Status Meeting 8	2 hrs	Tue 11/10/20	Tue 11/10/20
11			Review Existing HR Manual	1 day	Mon 8/3/20	Mon 8/3/20

Figure 3-5: A recurring task.

## The Recurring Task Information Dialog Box

Rather than entering the details about recurring tasks multiple times, they can be entered once as a recurring task using the **Recurring Task Information** dialog box. The recurring task names are entered in the **Task Name** text box and the recurrence pattern for the task is set by selecting the desired options under the **Recurrence pattern** section, which sets the frequency of the task occurrence and the desired day. This dialog box also allows you to set the start date and the end date for the recurring task under the **Range of recurrence** section and helps assign the desired calendar for scheduling the project from the **Calendar** drop-down list.

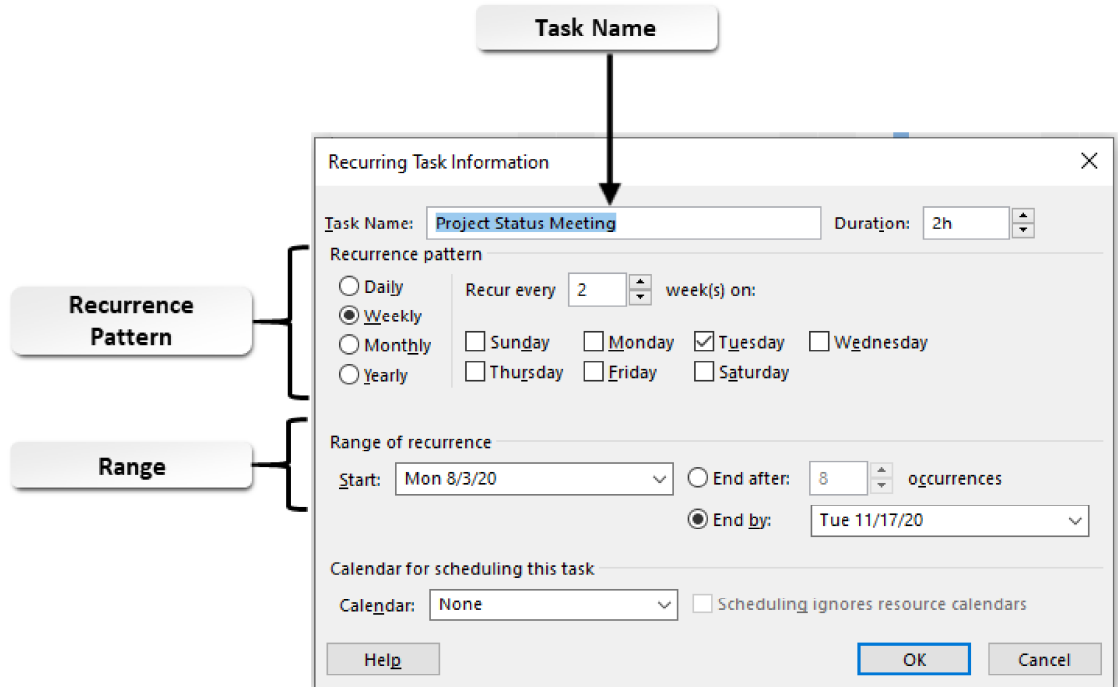



Figure 3–6: The Recurring Task Information dialog box.

	<p>Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Add Recurring Tasks to a Project Plan.</p>
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# ACTIVITY 3-1

## Adding Tasks to a Project Plan

### Data File

C:\091098Data\Adding Project Tasks\HR Manual Tasks.mpp

### Before You Begin

The Greene City National Bank calendar has been added to the HR Manual Tasks file.

### Scenario

During the first status meeting for the HR Manual project, the project team identified some of the key tasks needed for the project. Because the project plan is in an early development phase, you decide to enter the information you have so far into the project plan file and to add additional tasks when the team has determined what they will be. You also want to create a recurring task that shows a Project Status Meeting occurring on alternate Tuesdays through November 10 (the approximate date you think the project will be complete).

#### 1. Open the HR Manual Tasks.mpp project plan file.

- On the **Open** tab, in **Backstage View**, select **Browse**.
- In the **Open** dialog box, navigate to the **C:\091098Data\Adding Project Tasks** folder containing your class files.
- Select **HR Manual Tasks.mpp** and select **Open**.

#### 2. Set the Task Mode to Automatic.

- On the status bar, select **New Tasks: Manually Scheduled** and then select **Auto Scheduled - Task dates are calculated by Microsoft Project**.
- On the status bar, verify that **New Tasks: Auto Scheduled** is displayed.

#### 3. Display the Duration, Start, and Finish fields in the Task Entry table.

- Position the cursor on the divider bar between the **Task Entry** table and the Gantt chart. Notice that the cursor changes to a horizontal double-headed arrow.
- If necessary, drag the cursor until the **Finish** column is visible in the **Task Entry** pane.

#### 4. Enter the first task name.

- In the **Task Entry** table, in the first row, in the **Task Name** column, type **Begin Project** then press **Enter**.
- Verify that the task name has been entered correctly, that the **Duration** column contains **1 day?**, and that the **Start** and **Finish** columns each contain **Mon 8/3/20**.

#### 5. Add the following tasks below **Begin Project**.





- *Review Existing HR Manual*
- *Review Government Regulations*
- *Review Common Industry Practices*
- *Interview Department Heads*



**Note:** Microsoft Project word-wraps the names, so all of the text is visible.

6. Add **Project Status Meeting** as a recurring task, which should occur every other Tuesday from August 3, 2020 until November 17, 2020.


- a) Select the task name **Review Existing HR Manual**.
- b) Select **Task→Insert Recurring Task**.
- c) In the **Recurring Task Information** dialog box, type *Project Status Meeting* as the task name.
- d) In the **Duration** text box, type *2h*
- e) Set the recurrence interval to **Weekly**, **Recur every 2 weeks**, and check **Tuesday**.
- f) In the **End by** drop-down box, enter *11/10/2020*
- g) Select **OK**.

	<b>Note:</b> The <b>Information</b> field  for Task 2 shows a <b>Recurring Task</b> icon  , and for Tasks 3-10 it shows a <b>Start No Earlier Than Constraint</b> icon. 
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- h) Widen the **Task Name** field to see all eight instances of the **Project Status Meeting** recurring task.

7. Relocate task 13 to task 12.

- a) Select the ID number for task 13, **Review Common Industry Practices**, to select the entire row.
- b) On the **Task** tab, select **Cut** (or press **Ctrl+X**).

	<b>Note:</b> You can also drag to rearrange tasks.
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- c) Select the ID number for task 12, and select **Paste** (or press **Ctrl+V**).

8. Save the file as *My HR Manual Tasks* and leave it open.

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