

# TOPIC C

## Share a Project Plan

Once you draft a project plan, you will need to deliver it to your project stakeholders for review and to your project sponsor for approval. In this topic, you will use several methods for delivering project plans.

### Printed Project Plans

You can print any view on the **View** bar. The **Gantt Chart** view is the one most often shared in paper format, but you may find it useful to print other project views—especially the **Calendar** and **Network Diagram** views.

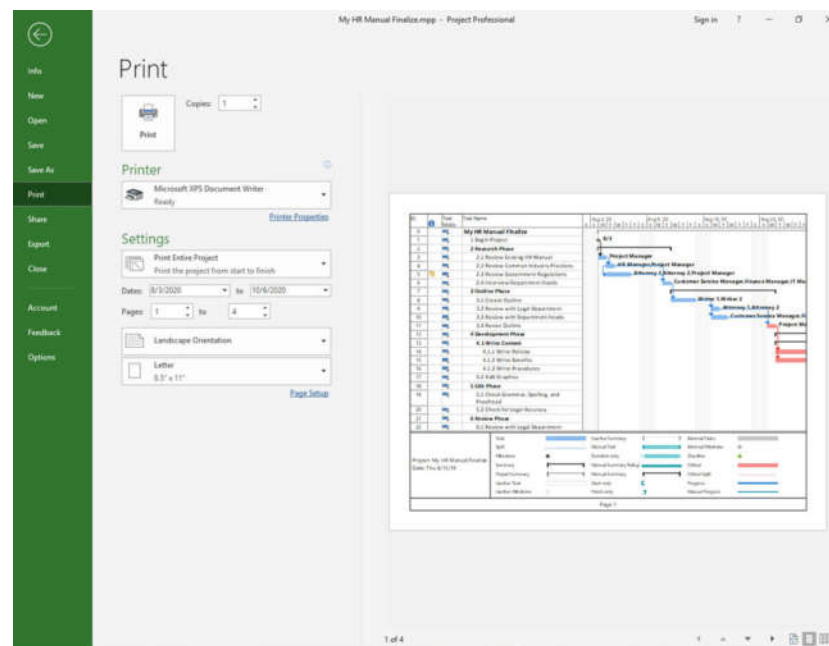
Before you print a view, you may want to change the amount of detail that will be displayed. You can do this by:

- Hiding subtasks
- Hiding columns
- Resizing the panes of a view
- Changing the zoom level



**Note:** Remember that you can select **View**→**Entire Project** to see the entire timescale in a view.

Once the view is adjusted to your desired detail amount and zoom level, you can start printing by selecting the **File** tab on the ribbon and then selecting the **Print** tab in **Backstage View**. The first thing you will probably notice on the **Print** screen is the large **Print Preview** area in the right pane, which shows you exactly how the printed page will look. In the bottom-right corner of the **Print Preview** pane, you will find several controls for navigating and zooming the preview.



**Figure 6–7:** Print Preview pane.

If you are not satisfied with the preview, you can change the **Settings** options in the left pane on the **Print** tab. You can choose to print:

- The entire project.
- Specific dates.
- Specific pages.
- In landscape or portrait page orientation.
- A variety of page sizes.

If you select the **Page Setup** link, a **Page Setup** dialog box will open that gives you many more options grouped into six tabs. These include the margins, header, footer, and legend.

When the **Print Preview** looks like you want, you can select a printer and select the **Print** button.

## Print Settings

In the **Print Preview** pane, you will find a number of useful print settings.

<i>Setting</i>	<i>Description</i>
<b>Print Entire Project</b>	Print from start to finish.
<b>Print Specific Dates</b>	Print the timescale between specific dates.
<b>Print Specific Pages</b>	Only print the pages specified.
<b>Print Custom Dates and Pages</b>	Enter specific pages and timescale dates for printing.
<b>Orientation</b>	Print landscape or portrait.
<b>Paper Size</b>	Select from a range of paper sizes.

## Page Setup Options

Project also has six categories of page setup options.

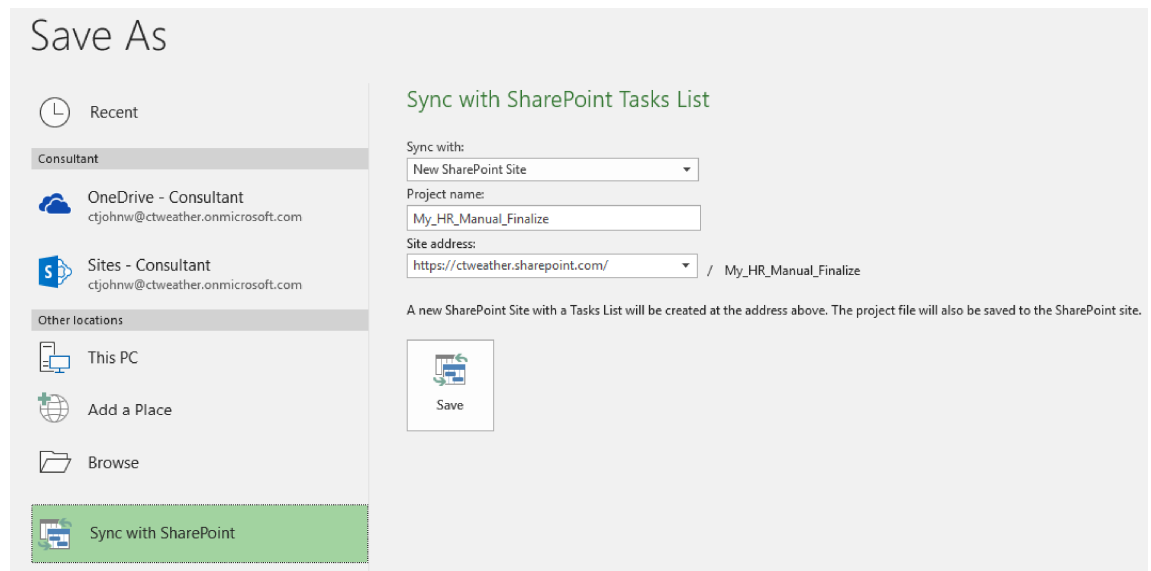
<i>Option</i>	<i>Description</i>
<b>Page</b>	<ul style="list-style-type: none"> <li>• Orientation</li> <li>• Scaling</li> <li>• Paper size</li> <li>• First page number</li> </ul>
<b>Margins</b>	<ul style="list-style-type: none"> <li>• Size on each side of the page</li> <li>• Borders</li> </ul>
<b>Header</b>	<ul style="list-style-type: none"> <li>• Left, Center, and Right</li> <li>• General fields (<b>Project Title</b>, <b>Manager Name</b>, <b>Project Start Date</b>, etc.)</li> <li>• Project fields (All columns within MS Project)</li> </ul>
<b>Footer</b>	<ul style="list-style-type: none"> <li>• Left, Center, and Right</li> <li>• General fields (<b>Project Title</b>, <b>Manager Name</b>, <b>Project Start Date</b>, etc.)</li> <li>• Project fields (All columns within MS Project)</li> </ul>
<b>Legend</b>	<ul style="list-style-type: none"> <li>• Same options as header and footer, plus: <ul style="list-style-type: none"> <li>• Legend on every page, legend page, or none</li> <li>• Width of legend</li> </ul> </li> </ul>

Option	Description
View	<ul style="list-style-type: none"> <li>• Print all or a certain number of columns</li> <li>• Print notes</li> <li>• Print blank pages</li> <li>• Fit timescale to end of page</li> </ul>



## Syncing Project Plans with SharePoint

If your organization uses Microsoft® SharePoint®, you can synchronize your Microsoft Project Professional task list with a SharePoint task list. Project team members can view the schedule on SharePoint. When they update their work progress on SharePoint, you will see their changes in Project. Conversely, any changes you make in Project will be updated on SharePoint so that team members can see them.

When you select the **Sync with SharePoint** button on the **Share** screen, you will be prompted to go to the **Save As** screen. When you select the **Sync with SharePoint** button on the **Save As** screen, you will have the option of syncing with a new SharePoint site or an existing one. In either case you will need a valid SharePoint **Site address**, **User Name**, and **Password**.

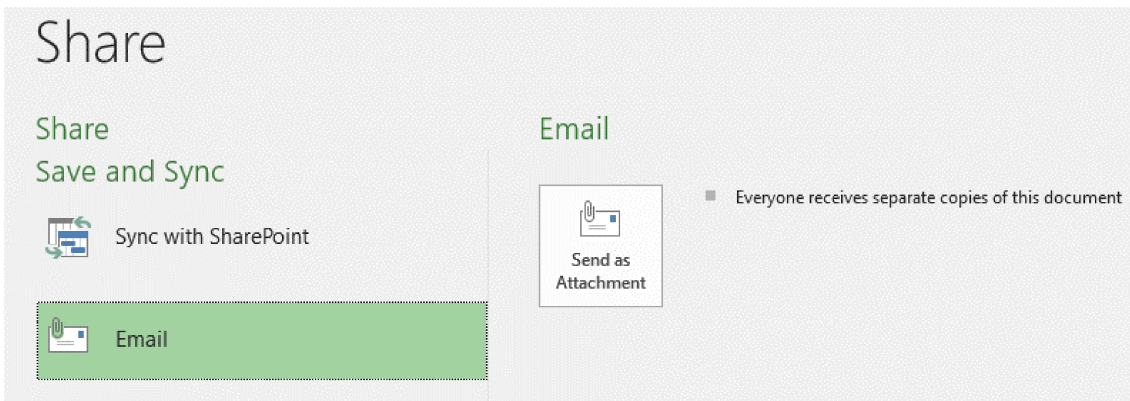


**Figure 6–8:** You can sync your project plan with SharePoint.


	<b>Note:</b> You can access the <b>Sync with SharePoint</b> button directly from the <b>Save As</b> screen if you wish.
	<b>Note:</b> To learn more about working with SharePoint, check out the Spotlight on <b>Syncing Project Files with SharePoint</b> presentation from the <b>Spotlight</b> tile on the CHOICE Course screen.


## Emailing Project Plans

From the **Share** screen you can also email the Project file to one or more people. When you select the **Email** button and then the **Send as Attachment** button, a new Microsoft® Outlook® email message will be generated with a copy of the Project file as an attachment. However, be aware that recipients must have a version of Microsoft Project or a third-party Microsoft Project viewer installed on their computers to view the attachment.



**Figure 6–9:** You can email your project plan to interested stakeholders.

 **Note:** To learn more about sharing Project files by email, check out the Spotlight on **Sharing Project Files by Email** presentation from the **Spotlight** tile on the CHOICE Course screen.

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

# ACTIVITY 6–3

## Sharing a Project Plan

### Before You Begin

The **My HR Manual Finalize.mpp** file is open.

### Scenario

You want to share your project plan as a handout with the project team at the next meeting. You will prepare the file for printing by hiding the **Timeline** and some of the **Task Entry** fields, and print it.

#### 1. Display the **Task Entry** table.

- Right-click the **Select Table** button (the empty area in the top left of the **Task Entry** table).
- Select **Entry**.



**Note:** Only entire fields will print, so you do not need to completely cover up a field. If you drag too far to the left, the **Task Name** field will not print.

#### 2. In the **Task Entry** table, do not show the **Work**, **Duration**, **Start**, and **Finish** fields.

- Select the separator bar to the right of the **Finish** field, and drag to the left until only the **Task Name** field is displayed.
- Scroll the Gantt chart to the left so the **Begin Project** milestone is near the right edge of the **Task Entry** table.

	Task Modt	Task Name	W	S	M	T	W	T
0		My HR Manual Finalize	7					
1		1 Begin Project	0					
2		2 Research Phase	10					
3		2.1 Review Existing HR Manual	8					
4		2.2 Review Common Industry Practices	16					
5		2.3 Review Government Regulations	48					
6		2.4 Interview Department Heads	32					

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#### 3. Hide the **Timeline**.

- On the ribbon, select the **View** tab.
- In the **Split View** group, uncheck **Timeline**.

#### 4. Print the project plan.

- Select **File**→**Print**.
- On the **Print** screen, from the **Printer** drop-down list, select **Microsoft XPS Document Writer**.
- Select **Print**.
- In the **Save Print Output As** dialog box, select **Desktop**.

- e) In the **File Name** field, enter *My Printout* and select **Save**.
- f) Monitor the progress in the **Printing** dialog box.

## 5. Save the file and close it.

- a) In **Backstage View**, select the arrow at the top of the left pane to return to the **Gantt Chart** view.
  - b) Select **File→Save**.
  - c) Select **File→Close**.
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## Summary

In this lesson, you optimized and delivered a Microsoft Project plan on paper and in several electronic formats.

**Which view(s) of your next project plan are you most likely to print, and why?**

**Why should you optimize the project plan?**



**Note:** Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.