



# TOUR OF MS PROJECT INTERFACE

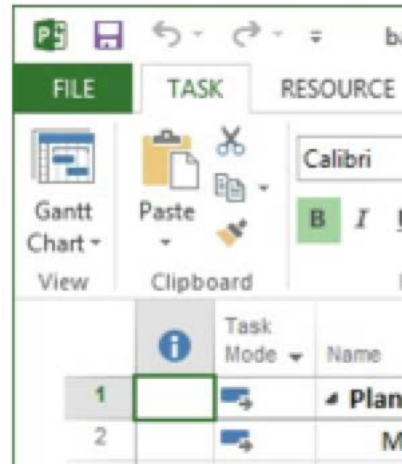
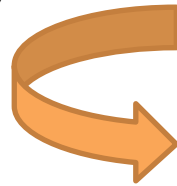
MS Project Ribbon  
Tabs & Commands  
Quick Access Bar  
Project General Options



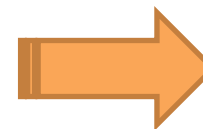
# MAIN TABS: THE FILE TAB

MS Project Interface features the popular Microsoft Ribbon displaying a set of key tabs and groups of commands.

Let's start with the first tab on the left hand side, the "File" Tab. When you activate the File tab, you will access to most commonly used function for *managing files* and *settings options*.



**Click on File**, the interface layout changes. You are in what is known as the *Backstage View*.



## MAIN TABS: FILE

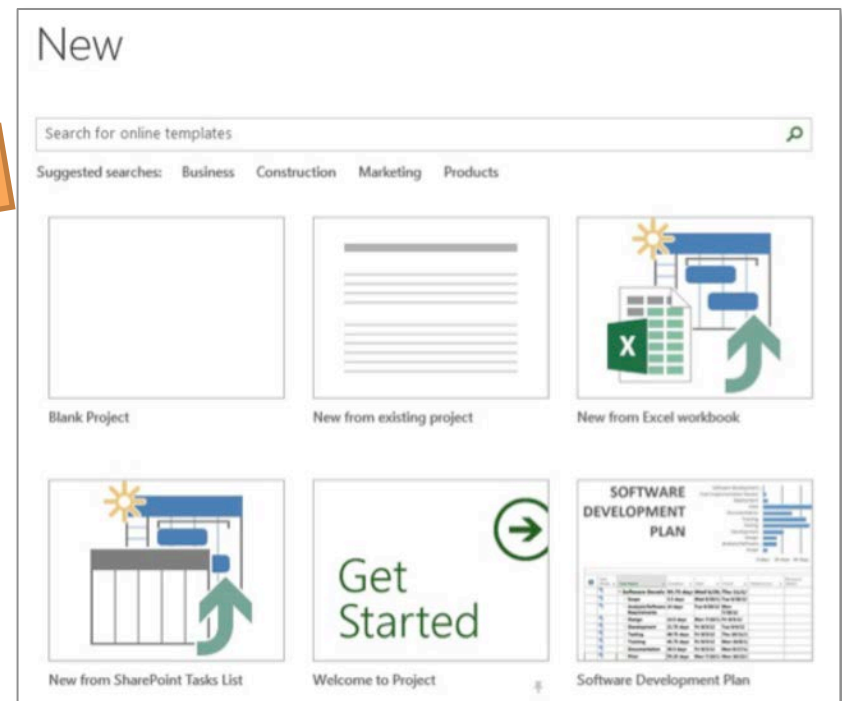
Ready to create  
a “new”  
project?



## MAIN TABS: FILE

*From within the backstage view, there are two ways to create a new project:*

- Leverage available templates: no need to reinvent the wheel.
- Start with a Blank Project whenever a custom plan makes more sense.



## MAIN TABS: THE TASK TAB

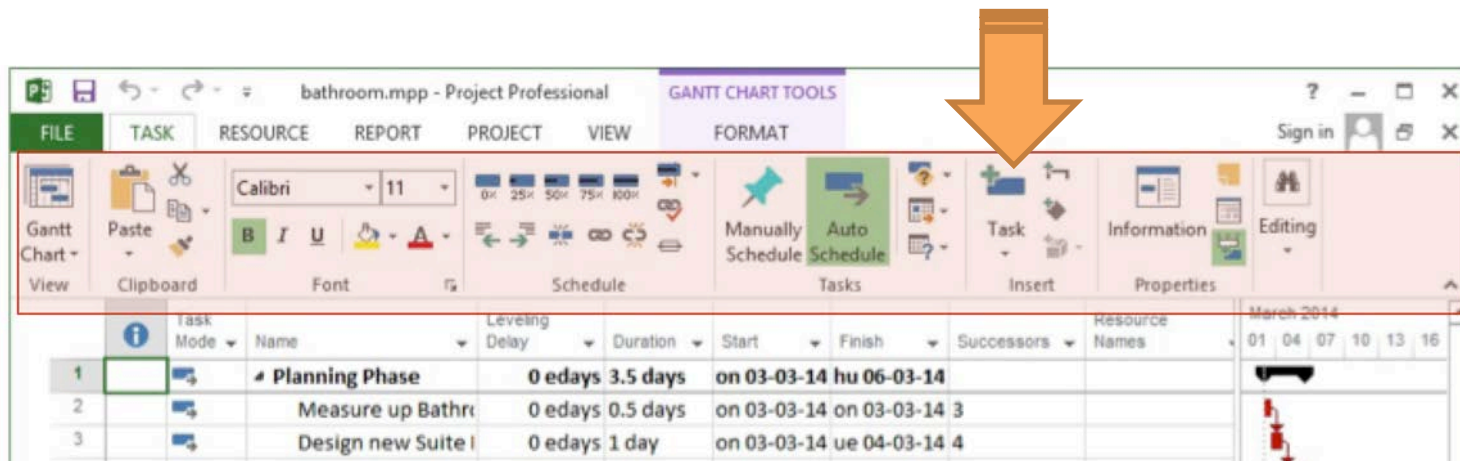
Managing tasks is at the core of your project plan.

MS Project commands are grouped under the “task” tab.



# MAIN TABS: THE TASK TAB

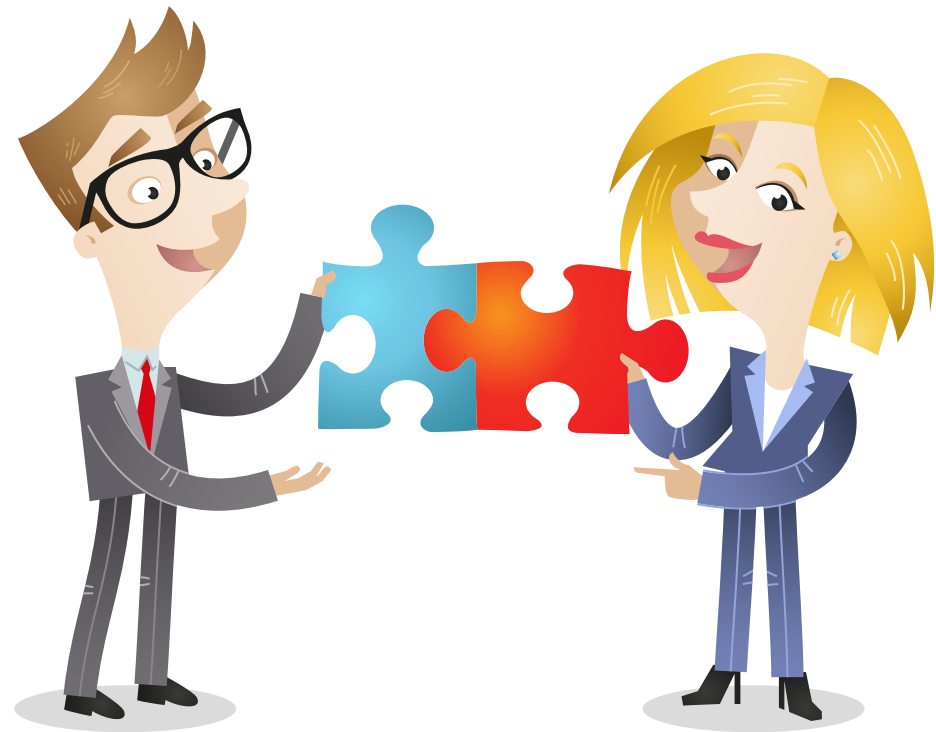
You will be using commands from the “task” tab quite frequently. There are many commands, they are grouped logically for convenience of use.



## MAIN TABS: THE RESOURCE TAB

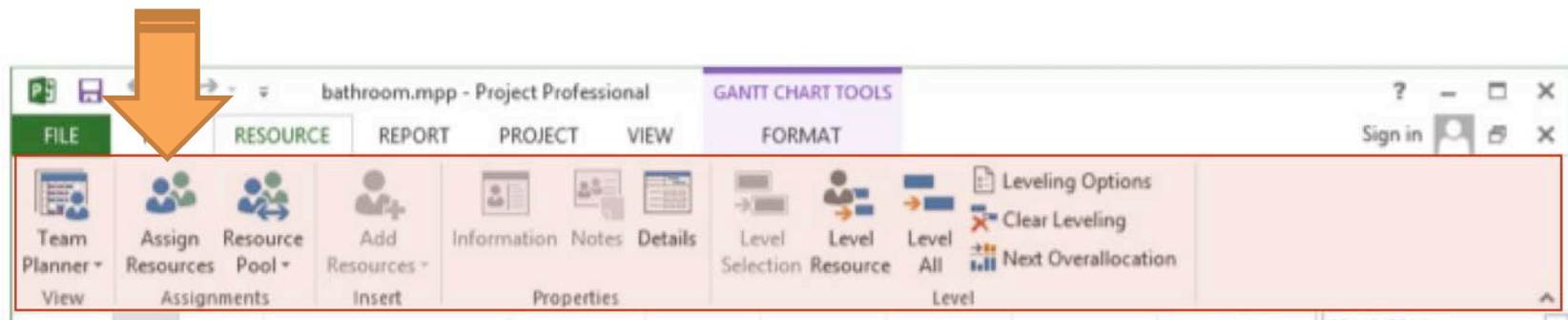
Assigning resources to task is what makes your project move forward to completion.

MS Project has many useful commands to manage your project team assignments in an efficient manner.



## MAIN TABS: THE RESOURCE TAB

- The “resource” tab is where you will find a variety of functions you may need to assign resources to your project tasks.
- More advanced and powerful features are found here as well, such as the leveling options.





## MAIN TABS: THE REPORT TAB

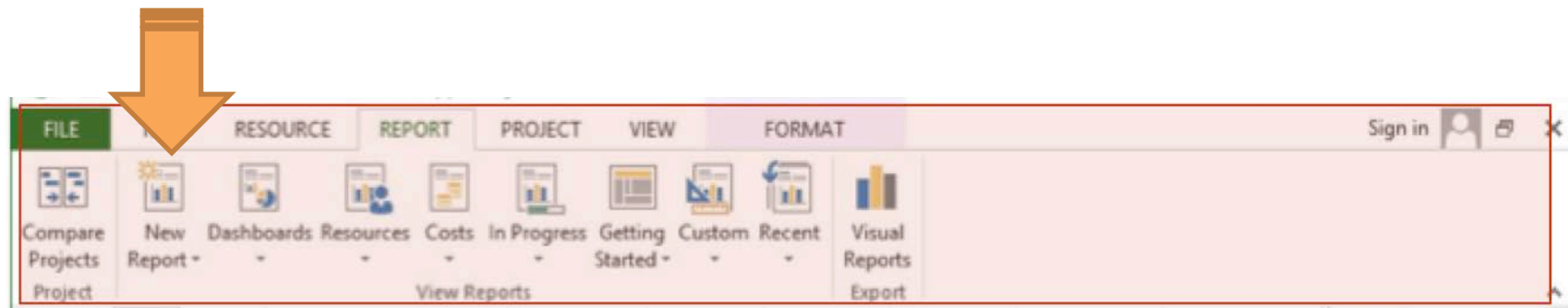
Get the word across  
of how your project is  
doing.

Obtain stakeholders'  
engagement with the  
right reporting tools.



## MAIN TABS: THE REPORT TAB

- In MS Project 2013 and beyond, the reporting tools have been made more prominent and are more readily available.
- Reporting is a critical component of project management and many types of report from the simplest project status to the more complex, including sophisticated dashboard can be developed with MS Project.



## MAIN TABS: THE PROJECT TAB

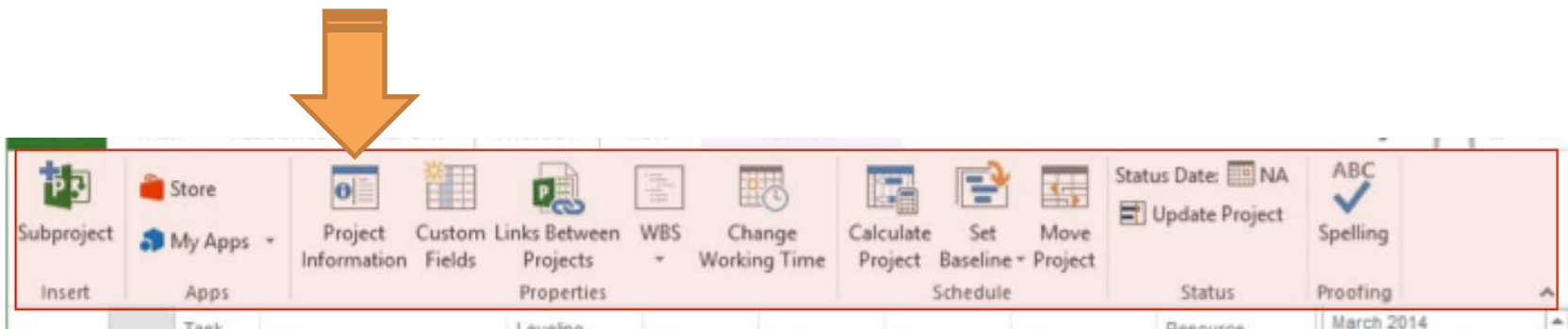
Keep your Zen knowing that MS Project options are set right from the get go.



## MAIN TABS: THE PROJECT TAB

A set of commands are grouped together to manage high level parameters for your project enabling you to:

- Managing project's top information
- Creating subprojects
- Managing projects links



## MAIN TABS: THE VIEW TAB



Let's take some height and get to know more about how MS Project can allow you to use the most appropriate view of your project data.

## MAIN TABS: THE VIEW TAB

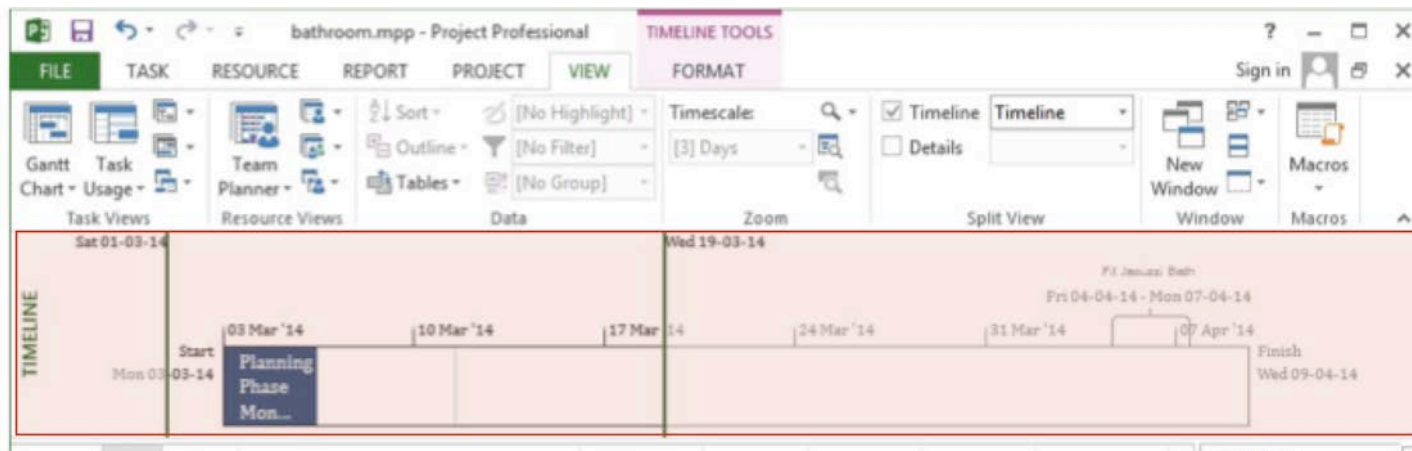
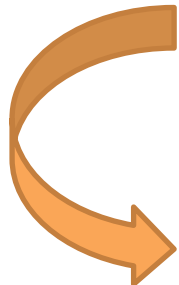
- MS Project allows you to “see” your project data from different perspective. Sophisticated tools for filtering and sorting data will display custom views.
- The Gantt Chart is an essential view, several formatting options are readily available to create the right chart for your project.



Task Mode	Name	Leveling Delay	Duration	Start	Finish	Successors	Resource Names
1	Planning Phase	0 days	3.5 days	on 03-03-14	hu 06-03-14		
2	Measure up Bathr	0 days	0.5 days	on 03-03-14	on 03-03-14	3	
3	Design new Suite	0 days	1 day	on 03-03-14	ue 04-03-14	4	

# THE TIMELINE VIEW

- Introducing the “Timeline” View
  - Key tasks can be highlighted
  - The “Callout” feature allows you to provide more details to the viewers



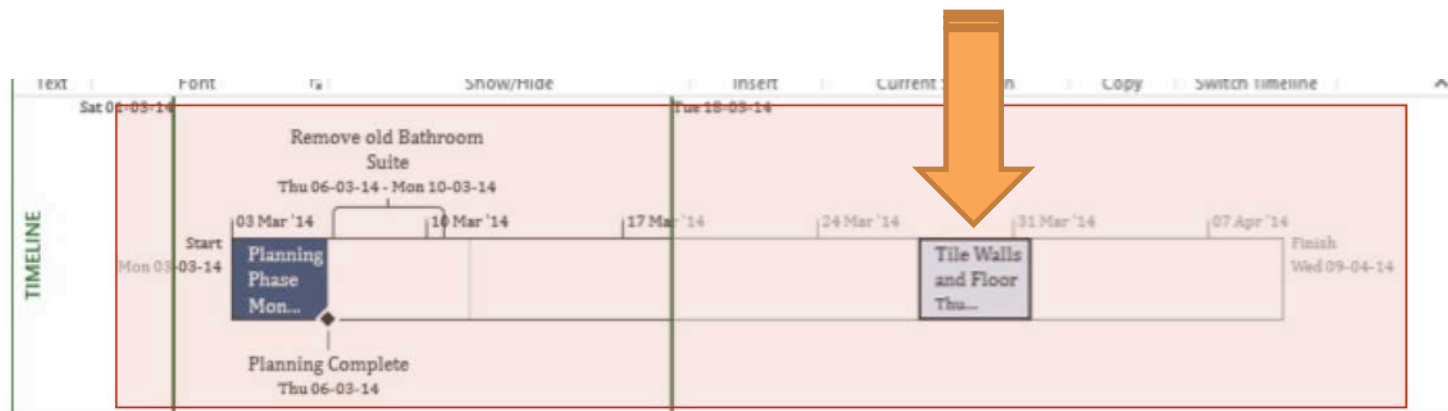
# CUSTOMIZING THE TIMELINE VIEW

Customize your timeline view to share summaries with stakeholders and show the important tasks and few details that matter to your audience.

How to add tasks to the timeline? The process is called “populating the timeline”.

There are several ways to achieve this: *(this will be reviewed in detail in the exercise section)*

- There is a convenient dialog box “Add Tasks to timeline”. This pop-up can be accessed via the contextual format tab, go to “insert” and select “existing tasks”.
- Another way is to right click on an existing task, and use the command “Add to timeline”
- A task can be highlighted as a simple bar or a callout: this can be set as part of the formatting options.





## MAIN TABS: THE FORMAT TAB

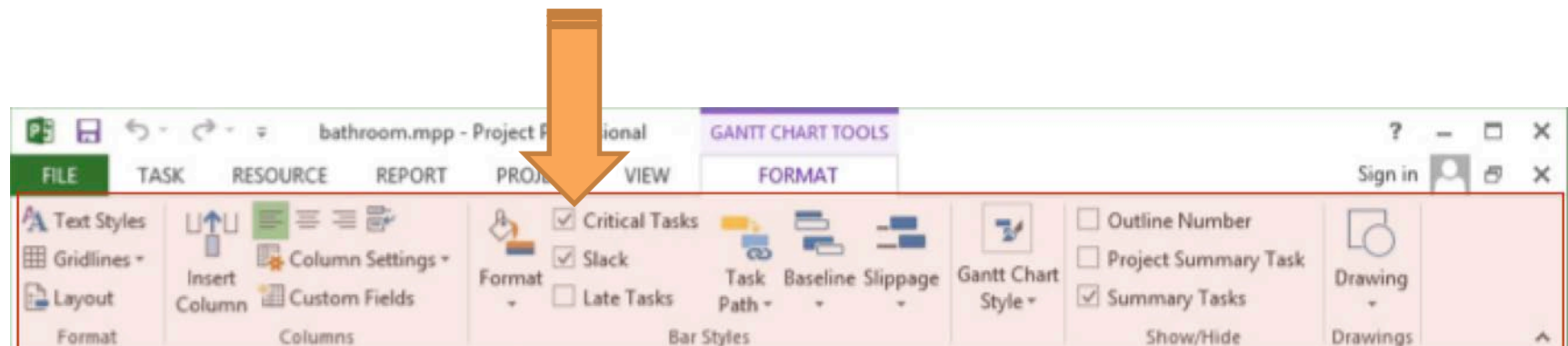
Communication is key to project success. Learning to formatting things to appeal to a variety of stakeholder and make your work easier is well worth it.



## MAIN TABS: THE FORMAT TAB

### The “Format” Tab

- The formatting options are context sensitive and will vary depending on the active view.
- The context of the format tab is shown above the tab label.
- For example, special formatting tools are available for the Gantt Chart View. You will see specific options such as showing the critical tasks and late tasks.



## QUICK ACCESS TOOLBAR

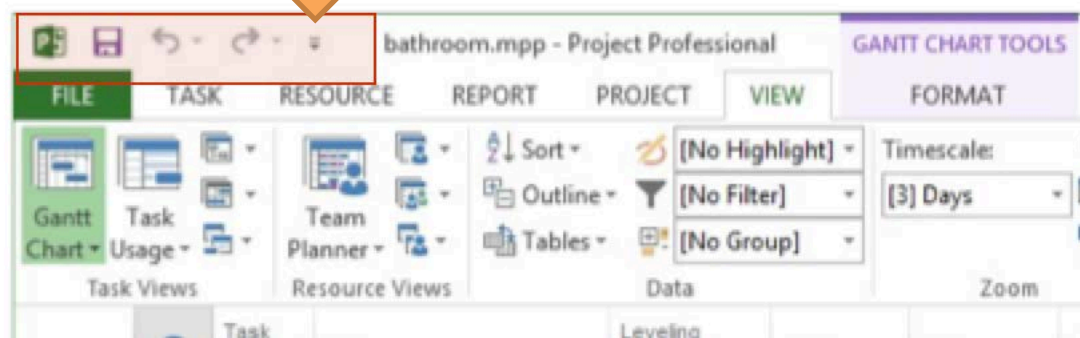


Let's get things done faster with the help of a custom Quick Access toolbar!

# QUICK ACCESS TOOLBAR

Let's look briefly at the "Quick Access" Toolbar. It is located in the top left corner by default:

- This toolbar provides direct and convenient access to most frequently used commands.
- It can easily be customized with the commands you are using the most, simply click on the arrow head pointing downward to add or remove commands.

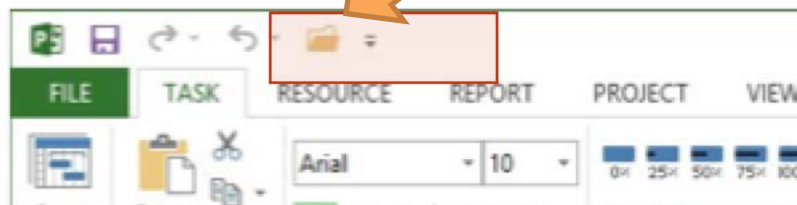
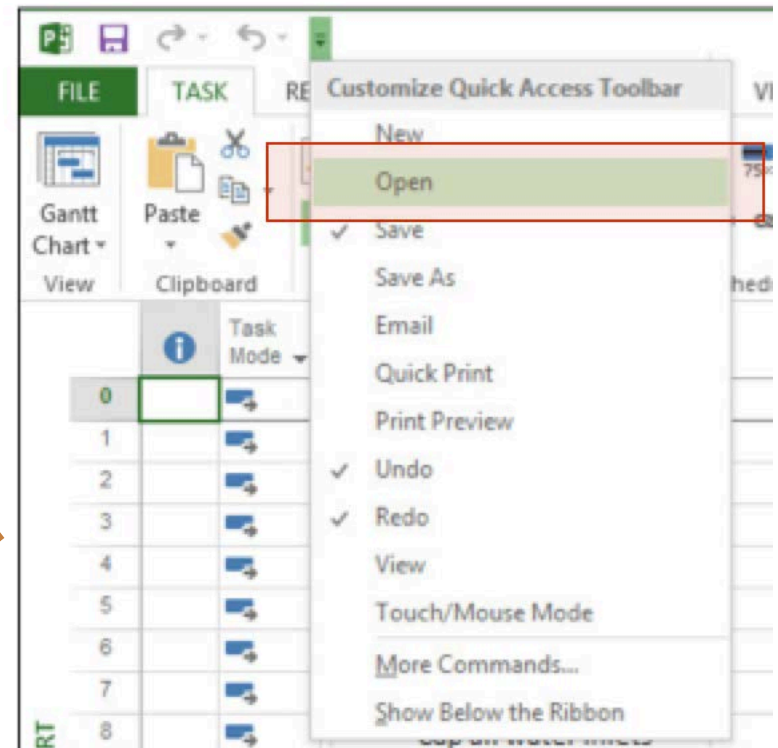


# QUICK ACCESS TOOLBAR

By default the quick access toolbar contains pre-defined set of commands. What if you are not using these commands often? Let's explore ways to set different commands in this convenient location.

The "Customize Quick Access toolbar" provides a comprehensive list of commands that can be added or removed using checkboxes.

For example, you can add the "Open" command to the quick access toolbar.



# MORE ABOUT THE QUICK ACCESS TOOLBAR

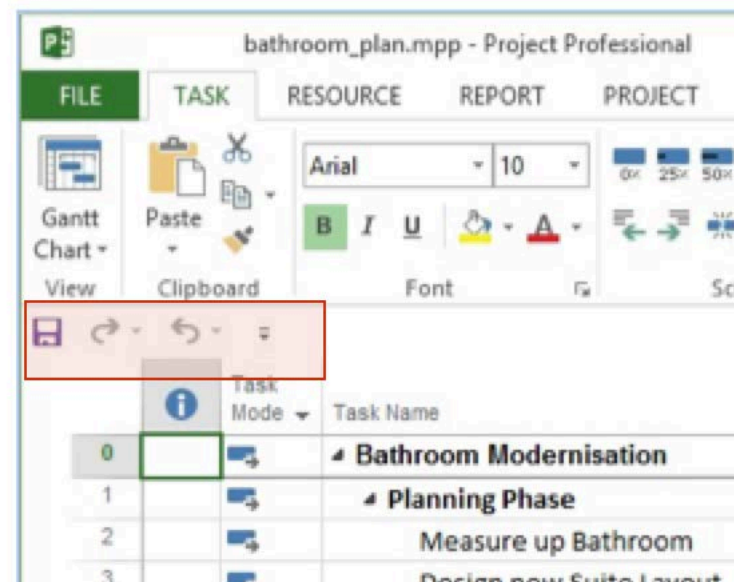
At the bottom of the “Customize Quick Access toolbar”, there are two more options that are interesting to use:

- What if the command you would like to add is not shown in the dialog box’s list, select “More commands”. You can choose using the filter box. Although finding your way with so many commands can be a try and error process sometimes! One way to go is to use the “popular commands”, you will most likely find what you need, such as the “Format painter” command as shown on the examples below.
- Another convenient feature is the ability to move the Quick Access Bar and show it below the Ribbon

Customize Quick Access Toolbar: ⓘ

For all documents (default) ▼

Save  
Redo  
Format Painter  
Undo



## CUSTOMIZING THE RIBBON

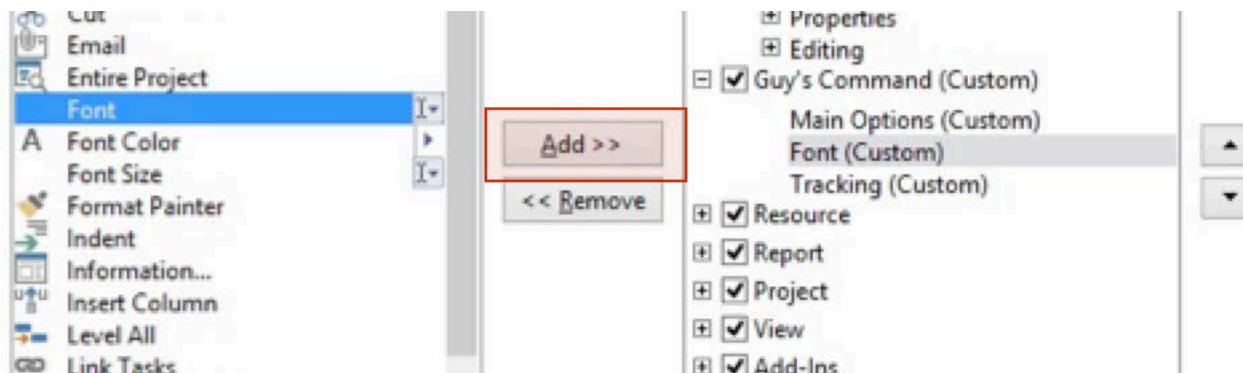
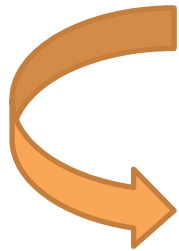


The ribbon can easily be customized to fit your needs and enhance your productivity.

# CUSTOMIZING THE RIBBON

It is easy to add new tabs, add or remove commands from groups and re-arrange the entire Ribbon to make it even more convenient and practical for you. How to access the customization mode:

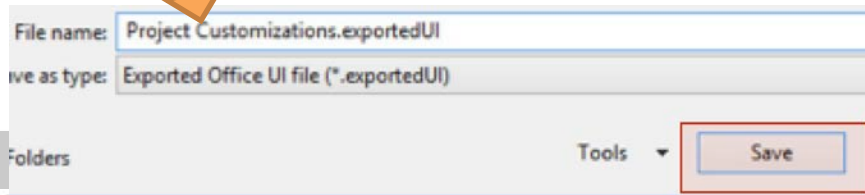
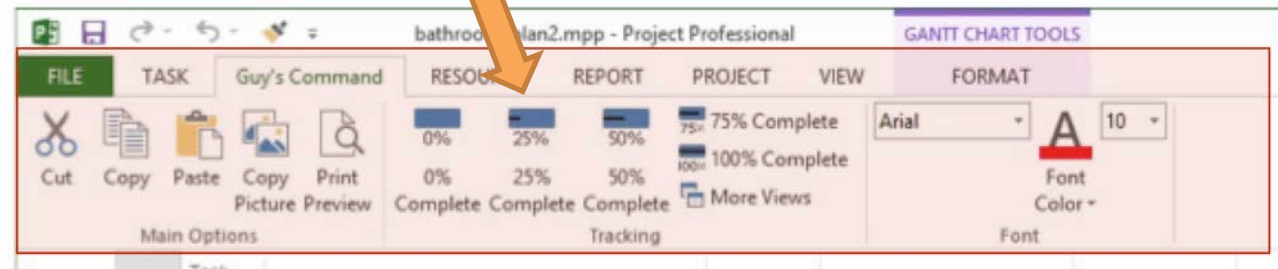
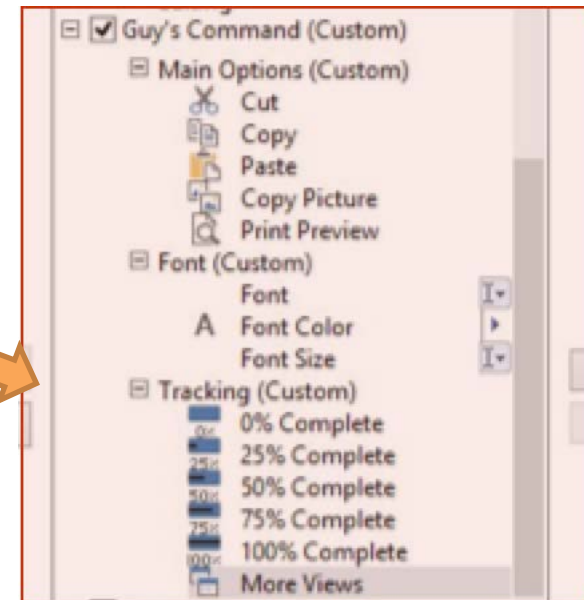
- Go to Project options
- Or right click the Ribbon
- To start customizing the Ribbon, open the Project Options Dialog box.
- To Add and rename a custom tab, click the “New Tab” button and further on the “rename”. You can also select an icon of your choice.
- In your new custom tab, add commands that will be grouped under in your custom tab. See below, we just started by adding font commands.





# CUSTOMIZING THE RIBBON (CONT'D)

- We added several tracking commands, making it super convenient to access pre-defined views such as showing all the tasks with a specific completion status.
- This new custom tab and the commands it contains will give you a boost in productivity each time you are interested to see and analyze data through these these specific commands.
- Do not forget to “Save” your custom Ribbon as a new “user Interface” file identified with the extension UI.



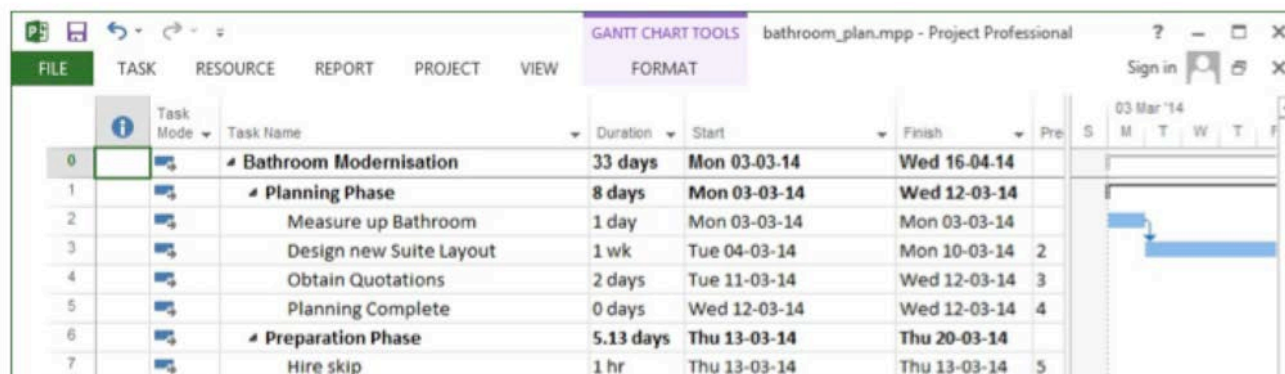
# HIDING THE RIBBON

The ribbon displays a large set of commands. They are grouped by default in logical way under each tab making more convenient and easier to retrieve when needed.

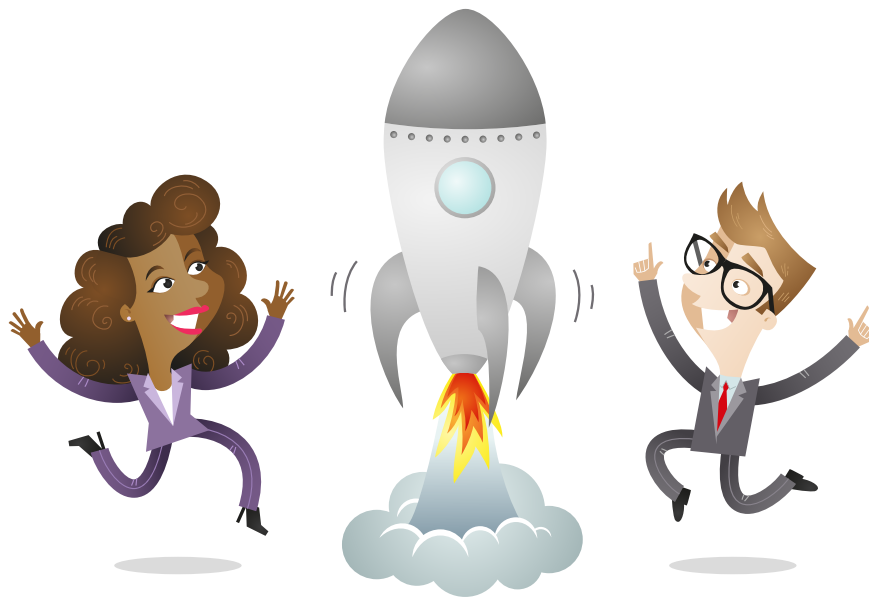
Improve your productivity by customizing the Ribbon to your specific needs.

To save space in your working window, you can also minimize or hide the ribbon:

- Click anywhere in the work area, the Ribbon disappears
- Double click on any of the tabs, the Ribbon is back in its original position



# GENERAL PROJECT OPTIONS



Set Project Options to match your project parameters behind the scene. Get the options the right way for your project and let it rock.

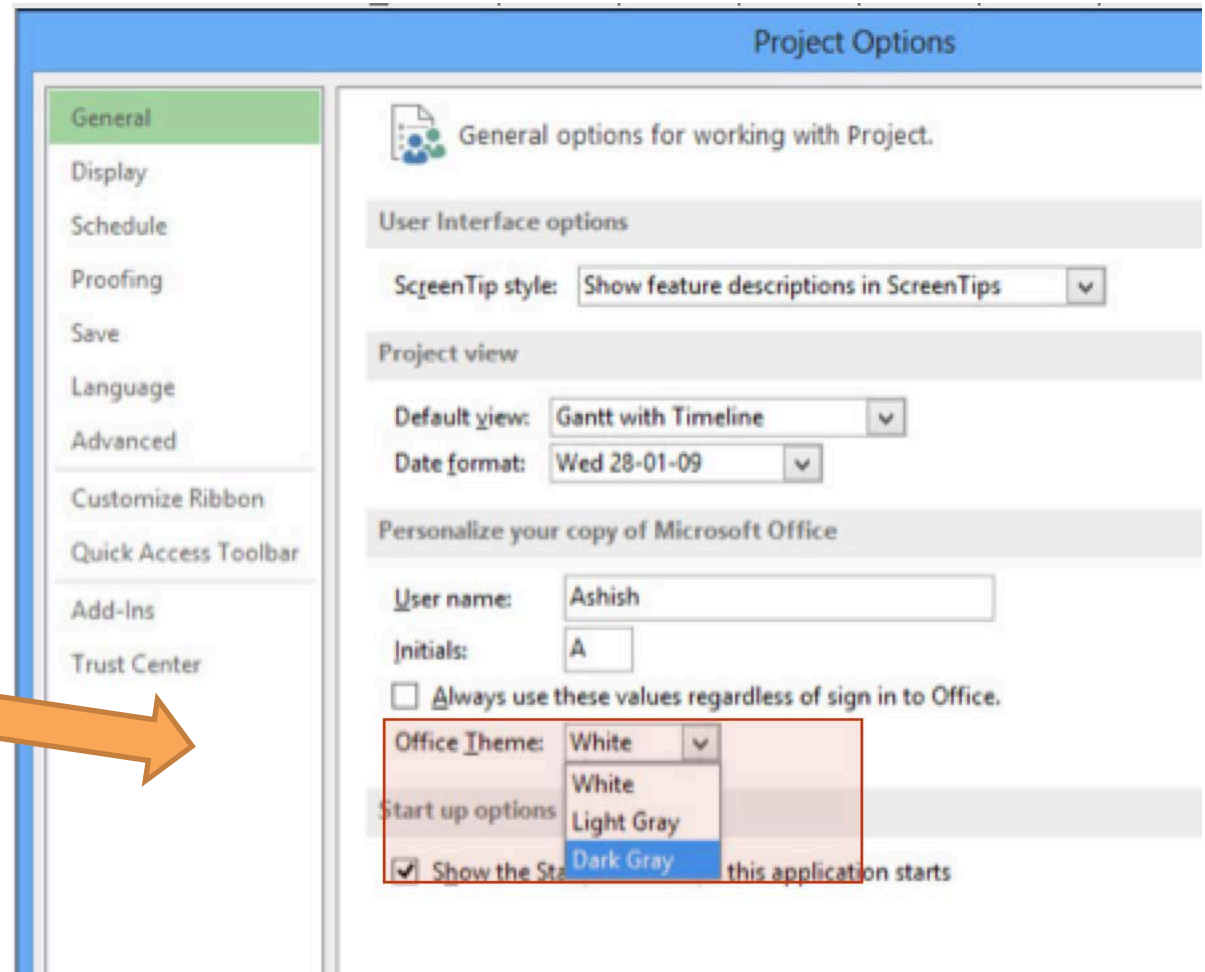
# GENERAL PROJECT OPTIONS

The general appearance of your interface can also be easily customized. The visual elements are part of the Project Colour Scheme.

There are several Default theme:

- White,
- Light Gray,
- Dark Gray

Select the theme that works best for you.

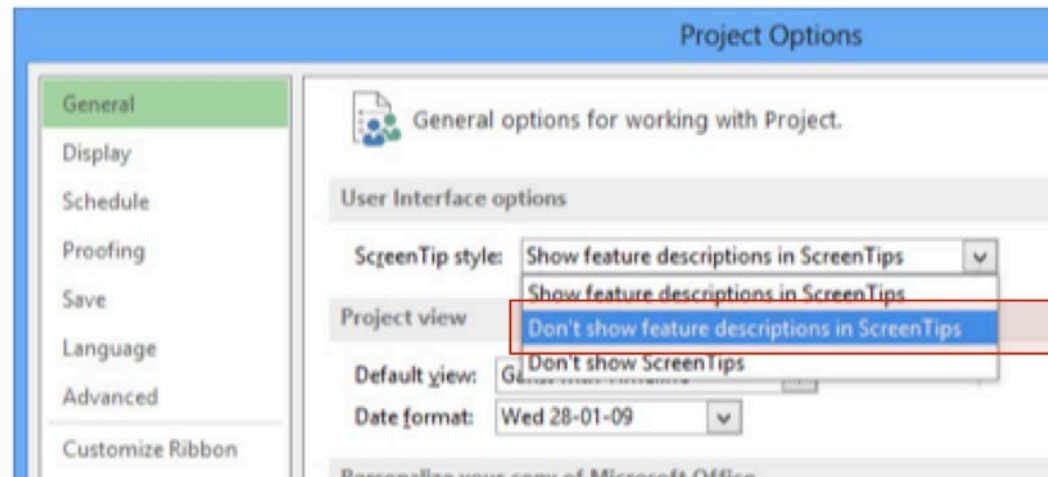
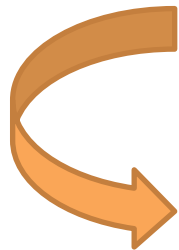


## GENERAL PROJECT OPTIONS (CONT'D)

Screen Tip Style: by default MS project displays the name and description of a selected command when you “mouse over” this command.

Although this option can be convenient as you start learning Project, it can become a visual annoyance once you have a good grasp of what each command is doing.

- How to enable or disable these tips, is pretty straightforward:

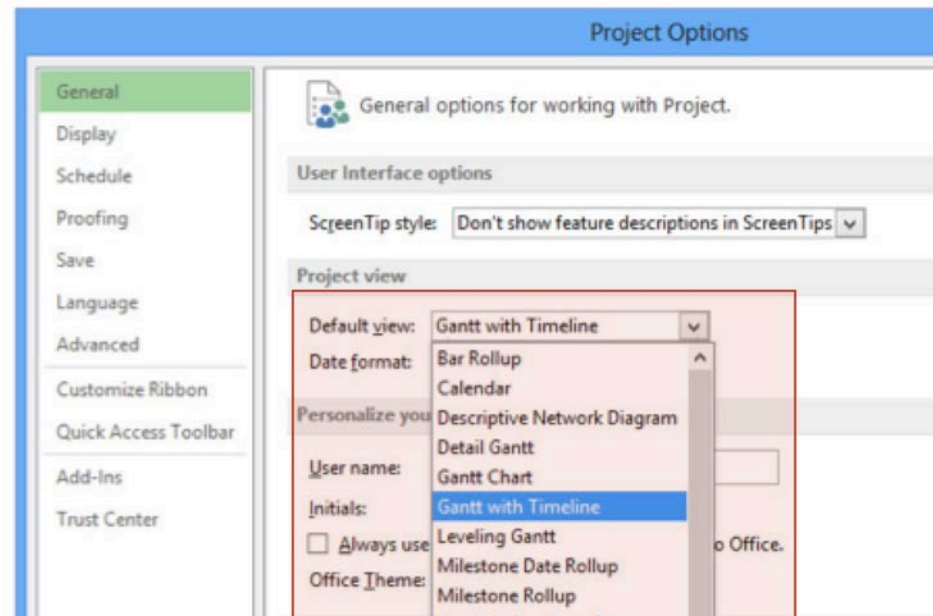
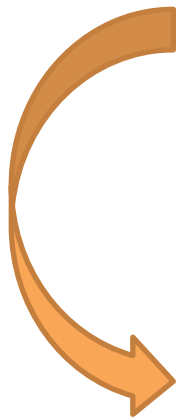


# GENERAL PROJECT OPTIONS (CONT'D)

Let's see another few ways to customize your Project default settings and fast track access to the settings that work best for you and your projects:

How to customize Project Default Views?

See below how to select the "Gantt with Timeline" as default view instead of having only the Gantt Chart. This new setting will provide step less for you to see your timeline!



# GENERAL PROJECT OPTIONS (CONT'D)

Let's see a couple more that are often useful.

- How to customize Project Date format
- How to Personalize your software copy

The image shows two screenshots from Microsoft Project. The left screenshot shows the 'Project view' section of the 'Project Options' dialog box. The 'Date format' dropdown menu is open, showing a list of date and time formats. The 'Wed 28-01-09' format is selected. The right screenshot shows the 'Project Options' dialog box with the 'General' tab selected. The 'Date format' is set to 'Wed 28-01-09'. The 'Personalize your copy of Microsoft Office' section is highlighted with a red box, showing the 'User name' set to 'Trainer' and 'Initials' set to 'A'. An orange arrow points from the text 'How to Personalize your software copy' to the 'Personalize your copy of Microsoft Office' section. Another orange arrow points from the text 'How to customize Project Date format' to the 'Date format' dropdown menu in the left screenshot.

# CONCLUSION

- MS Project provides a smart user interface known as the **Ribbon**. It provides a logical grouping of **commands** under a set of convenient and easy to access **tabs**.
- Not exactly what you need? MS Project interface is highly **customizable** and can be set in ways to improve your **productivity**.
- It is easy to customize the Ribbon, create **new** tabs and new groups of commands.
- Several **default options** can be modified to fit better your needs, such as the default color theme and the default view.



*Next, we will invite you to practice through a mix of exercise, hot spots and quizzes. We will revisit the elements introduced in this presentation and provide practical ways to practice these various features.*