

Gantt Charts for Publications Management

Use the instructions below to construct a Gantt chart for managing your final design project for this class. A dedicated project management program like MS Project is a wonderful tool, but I have found that constructing simple Gantt charts in Excel is sufficient for most purposes.

Making an Excel-based Gantt Chart

Making Gantt charts within Excel requires a basic knowledge of formulas and chart construction. Just follow the directions below to transform the basic data table in the file “gantchart.xls” into an interactive Gantt chart. You can download this file from the class exercise download site.

Calculating Duration of Tasks

1. Double click in the first cell of the *Duration* column.
2. Type an equals sign (=) and the following formula for subtracting the End Date from the Start Date: =D3-B3
3. Hit Return to enter the formula. You should see the number “14.”
4. Single click on the same cell and place your cursor precisely over the lower right corner of the cell until the cursor changes to a black plus sign (+).
5. Click-hold and drag the corner down the full length of the column to the bottom of row 13. The formula should now be repeated in each cell and show durations for the entire column.

Building the Initial Gantt Chart

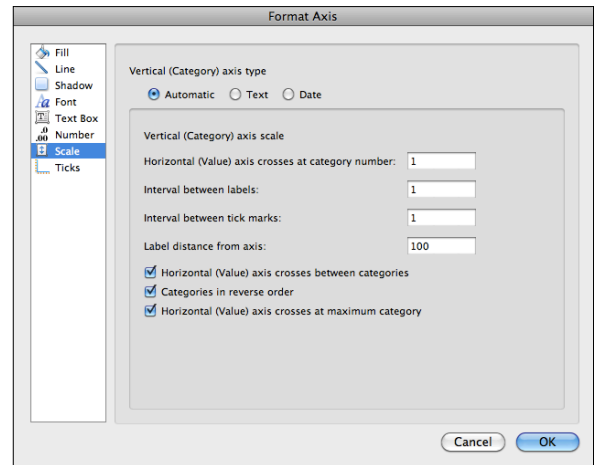
1. Click-hold in cell A2 and drag both down and over until you have selected columns A, B, and C for Rows 2-13. NOTE: Do not select column D at this time.
2. Select *Insert* → *Chart* on the top program menu to activate the Chart Wizard.
3. Under Chart Type, choose “Bar” and under Chart sub-type, choose “Stacked Bar.”
4. Click “Finish” at the bottom of the dialogue box to end the Chart Wizard and place the chart on the Excel Worksheet
5. Hold down the Shift key and drag the lower right corner of the chart to change its size while constraining its dimensions.

Formatting the Gantt Chart

As you can see, the basic chart is pretty messy, so we’ll clean it up before saving it as a final Excel file. Any future changes to the starting or ending dates in the data table will update the chart automatically (except for starting and ending dates for the entire project, which should be changed according to instructions on the next page). You can also save the chart as an HTML file. Continue instructions on the back page.

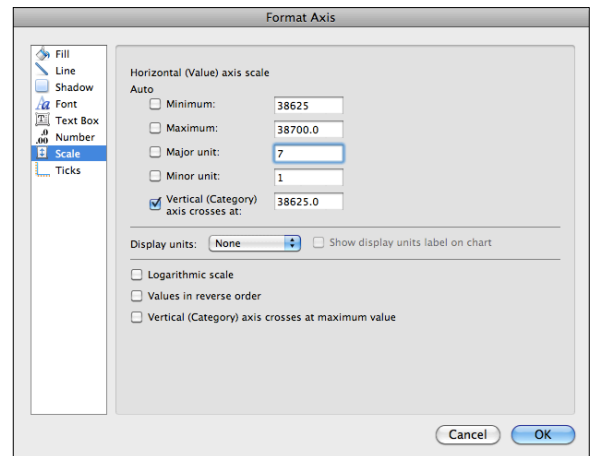
Formatting the Vertical Categories (Tasks)

1. Double click the task categories on the left side of the chart.
2. Under the *Scale* submenu, click on the check boxes for both “Categories in Reverse Order” and “Horizontal (Value) axis crosses at maximum category.”



Formatting the Horizontal Axis (Dates)

1. Double click the dates on the bottom of the chart.
2. Under the *Scale* submenu, type in the following information:
 - Minimum: 38625
 - Maximum: 38700
 - Major Unit: 7
 - Minor Unit: 1
 - Leave “Category (X) axis crosses” as is.
3. Under the *Number* submenu, choose the format that you want for dates. Since all dates fall within this calendar year, you can safely choose just the month and date format.
4. Under the *Text Box* submenu, choose -45 to have the number slant sideways.
5. Click OK to close the Dialogue Box.



Removing the Starting Dates and Legend.

Because we are only interested in the duration of each task, we need to remove the starting times for each task. To make expand the chart, we'll also remove the legend, because with only one remaining option section on each bar, the legend is pretty useless.

1. Double click on any of the starting dates bars (usually blue by default) to bring up the Format Chart Area dialogue box.
2. Under the *Fill* and *Line* submenus, set the Fill Color to “No Fill” and the Line Color to “No Line,” then click OK. This essentially removes the Starting Dates bars.
3. Select the chart legend and right click to choose “Clear” from the contextual menu. This will remove the legend, allowing the chart to fill the empty space.

Saving the Chart as a Webpage

1. Select the Gantt chart and under *File*, choose “Save as Web Page.” You will be prompted to save the chart as an HTML file, along with a folder called “Chart_files” that contains supporting files.

NOTE: This process creates fairly decent HTML code; it also converts the chart into a PNG file which can be pulled from the “Chart_files” folder and place on any webpage if you are unhappy with the automated results.