### **Creating Gantt Charts**

for Project Tasks

Instructional Guide by Tracy Summers

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# Overview Gantt Chart Purpose

Technical communicators and project managers use Gantt charts to monitor the progress of tasks within projects. This type of chart is helpful because it displays the schedule of tasks and the expected timeline for each task. As tasks and time frames change during a project, the user can easily adjust a chart to reflect the updated schedule of tasks.

Users type information in Microsoft Excel, and then use that spreadsheet's chart options to build the Gantt chart. The finished product shows individual tasks listed on a y-axis with duration bars displayed beside each task. The chart helps project participants visualize the schedule and expectations.

### Part 1 Create a Spreadsheet for Data

Use the following steps to create a spreadsheet for project data.

- 1 Open Microsoft Excel.
- 2 Create four columns with the following headings:

Task	Start Date	End Date	Duration

- 3 In the **Task** column, type the name of each task you want represented in the chart.
- 4 In the **Start Date** column, type the date each task starts.
- 5 In the **End Date** column, type the date each task ends.
- 6 In the **Duration** column, type the number of days for the length of each task.

**Tip:** Use an Excel formula to calculate the duration information by subtracting the start date from the end date.

### Part 2 Create a Stacked Bar Chart

Use the following steps to convert your spreadsheet into a stacked bar chart.

- **1** Open the spreadsheet that contains your data.
- 2 Select the cells that show the range of start dates.

1	A	В	С	D	E
1	Task	Start Date	End Date	Duration	
2	Gathering details	10/6	10/15	9	
3	Sharing documentation plan	10/7	10/10	4	
4	Presenting questions to SME	10/10	10/14	5	
5	Creating first draft	10/13	10/21	9	
6	Requesting SME review	10/21	10/27	7	
7	Applying edits	10/28	10/31	4	
8					
9					

Note: Do not select the entire column.

- **3** While the start date cells are selected, use the toolbar to insert a stacked bar chart.
  - **a** From the toolbar, click the **Insert** tab.
  - **b** Select the **Bar** > **2-D Bar** > stacked bar image.

Home	Insert	P	age Layou	t Formulas	Data Revi	ew View	w Acro	bat	
Table	Picture	Clip Art	Shapes S	imartArt Screenshot	Column Lin	k 🌑 le Pie		rea Scatter Other * * Charts *	Line Column Win/
B1		(m	fr	Start Date			2-D Bar		aparkiiries
ocument	t Update S	Schedu	le				3-D Bar		
		А		В	С	D	3-0 0ai	Stacked Bar	
Task				Start Date	End Date	Duration		Compare the	contribution of each
Gatherin	ng detai	ls		10/6	10/15	9	<u> </u>		tal across categories
Sharing	docume	ntatio	on plan	10/7	10/10	4	Cylinder	by using nor	izontal rectangles.
Present	ing ques	tions	to SME	10/10	10/14	5	(man)		the values on the chart rations or when the
Creating	g first dr	aft		10/13	10/21	9			is very long.
Request	ting SME	revie	W	10/21	10/27	7			
Applyin	g edits			10/28	10/31	4	Cone		
							8		

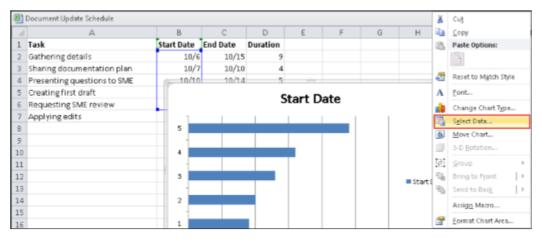
#### The spreadsheet displays a bar chart.

4	A	В	С	D	E	F	G	н	
L	Task	Start Date	End Date	Duration					
2	Gathering details	10/6	10/15	9					
)	Sharing documentation plan	10/7	10/10	4					
ţ	Presenting questions to SME	10/10	10/14	5	3333				-
;	Creating first draft	ľ							
5	Requesting SME review			S	tart D	ate			
7	Applying edits		1						
)		5							
		-							
0		4							
1									
2		3							
3		-						🔳 Start Date	
4		2							
5									
6		1							
7									
3		9/27	10/2	10/7 10	/12 10	/17 10/2	22 10/27		
9		-							-

### Part 3 Add Data and Descriptions to the Chart

Use the following steps to adjust the data in the bar chart.

**1** Click within the chart to select it, and then right-click to choose **Select Data**.



2 On the Select Data Source window, click Add.

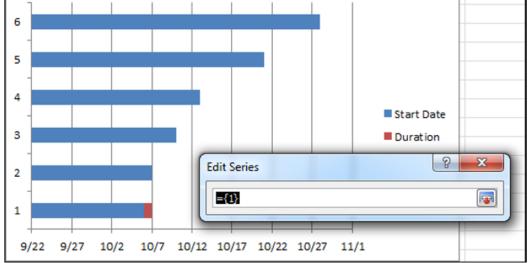
Select Data Source	?
Chart data range: =Sheet1!\$B\$1:\$B\$6	
Switch F	Row/Column
Legend Entries (Series)	Horizontal (Category) Axis Labels
Add Zedit X Remove	Edit_
Start Date	1
	2
	3
	4
	5
Hidden and Empty Cells	OK Cancel

The Edit Series window opens.

Edit Series	? 💌
Series <u>n</u> ame:	
E Series values:	🔣 Select Range
Series <u>v</u> alues:	
={1}	= 1
	OK Cancel

- **3** For **Series name**, type **Duration**.
- 4 For Series values, click the Select Range icon.

A dialog box opens for the **Series values** field.



- 5 With the dialog box open, select the data within the **Duration** column.
  - a In the **Duration** column, click the uppermost cell containing data.
  - **b** While the first cell is selected, move the cursor down the column to select all the cells with duration data.

Note: Do not select the column header or extra cells.

6 Click the **Select Range** icon to confirm the selection.

1			A		B	С	D	E
1	Tas	k			Start Date	End Date	Duration	
2	Gathering details				10/6	10/15	9	
3	Sha	aring d	ocument	ation plan	10/7	10/10	4	
4	Presenting questions to SME			10/10	10/14	5		
5	Creating first draft			10/13	10/21	9		
6	Requesting SME review			10/21	10/27	7		
7	App	plying	edits		10/28	10/31	4	
8								
9			21	1	1	1 1		
10		6		Edit Se	2		2	x
11		-		Edit Se	ines			-
12		5		=She	et1!\$D\$2:\$D\$7			
13								

#### 7 Click OK.

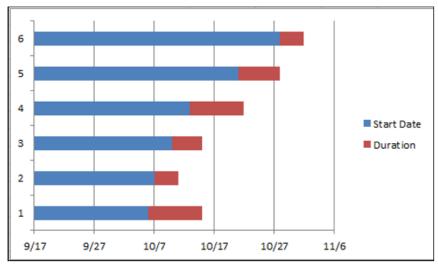
Edit Series	? ×
Series name:	
Duration	= Duration
Series <u>v</u> alues:	
=Sheet1!\$D\$2:\$D\$7	= 9, 4, 5, 9, 7,
	OK Cancel

The Select Data Source window opens, and the Legend Entries (Series) area lists Duration.

Select Data Source	2 ×
Chart <u>d</u> ata range:	
The data range is too complex to be displayed. If a new ran panel.	nge is selected, it will replace all of the series in the Series
	Row/Column
Legend Entries (Series)	Horizontal (Category) Axis Labels
Add ZEdit X Remove	Edit
Start Date	1
Duration	2
	3
	4
	5
Hidden and Empty Cells	OK Cancel

#### 8 Click OK.

The bar chart displays data for the **Start Date** and **Duration**.



- 9 Click within the chart to select it, and then right-click to choose **Select Data**.
- 10 Click Start Date to select it, and then click Edit in the Horizontal (Category) Axis Labels section.

Select Data Source	२ <mark>- × -</mark>					
Chart <u>d</u> ata range:						
The data range is too complex to be displayed. If a new range is selected, it will replace all of the series in the Series panel.						
Switch R	tow/Column					
Legend Entries (Series)	Horizontal (Category) Axis Labels					
Add ZEdit X Remove -	Edit					
Start Date	1					
Duration	2					
	3					
	4					
	5 -					
Hidden and Empty Cells	OK Cancel					

The Axis Labels window opens.

Axis Labels	? 💌
<u>A</u> xis label range:	Select Range
	OK Cancel

- **11** With the dialog box open, select the cells containing task descriptions.
  - a In the Tasks column, click the uppermost cell containing data.
  - **b** While the first cell is selected, move the cursor down the column to select all the cells with task descriptions.

Note: Do not select the column header or extra cells.

	A	В	С	D
1	Task	Start Date	End Date	Duration
2	Gathering details	10/6	10/15	9
3	Sharing documentation plan	10/7	10/10	4
4	Presenting questions to SME	10/10	10/14	5
5	Creating first draft	10/13	10/21	9
6	Requesting SME review	10/21	10/27	7
7	Applying edits	10/28	10/31	4
8	Axis Labels		[	8
10	Axis label range:			
11	Sheet11\$A\$2:\$A	\$7	🔝 😑 Gathe	ering deta
12	Requesting		ок	Cancel
13				

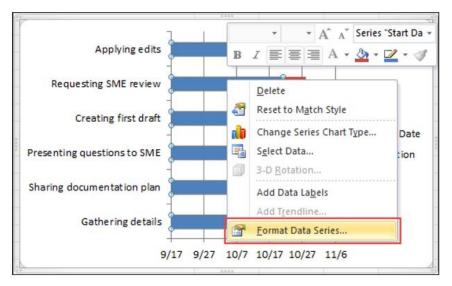
- 12 Click OK to close the Axis Labels window.
- **13** Click **OK** to close the **Select Data Source** window.
- **14** Delete the legend area from the chart.
  - **a** Within the chart, click the legend area to select it.
  - **b** Right-click, and then select **Delete**.

Start Date	Calibri (E $\cdot$ 10 $\cdot$ A $\cdot$ A Legend $\cdot$ B $I \equiv \equiv A \cdot 2 \cdot 3$
Ó B	Delete
	Reset to Match Style
	A <u>F</u> ont
	thange Chart Type
0/7 10/17 10/27 11/6	E Select Data
	3-D <u>R</u> otation
	Format Legend

# Part 4 Transform the Bar Chart into a Gantt Chart

Use the following steps to transform the bar chart into a Gantt chart.

- **1** Click within the chart to select the bars.
- 2 Rick-click, and then select Format Data Series.



The Format Data Series window opens.

Format Data Series	1 4			8 X
Series Options Fill Border Color Border Styles	Series Options Series <u>O</u> verlap Separated	100%	0	Overlapped
Shadow Glow and Soft Edges	Gap <u>W</u> idth No Gap	)		Large Gap
3-D Format	Plot Series On Primary Axis Secondary Axis	150%		
				Close

**3** From the left menu, click **Fill**.

4 In the Fill panel, select No fill.

F	ormat Data Series	2 ×
	Series Options	Fill
	Fill	● <u>N</u> o fill
	Border Color	Solid fill
	Border Styles	<u>G</u> radient fill <u>Picture or texture fill </u>
	Shadow	Pattern fill
	Glow and Soft Edges	Automatic
	3-D Format	Invert if negative
	L	Close

5 While the Format Data Series window is open, click on the task description area within the chart.The Format Axis window opens.

Format Axis	२ ×
Axis Options	Axis Options
Number	Interval between tick marks: 1
Fill	Interval between labels: Automatic
Line Color	Specify interval unit: 1
Line Style	☑ Categories in reverse order
Shadow	Label distance from axis: 100
Cleve and Soft Edges	Axis Type: omatically selected data
	Position ,
	On tic <u>k</u> marks
	Between tick marks
	Close

6 In the Axis Options panel, select Categories in reverse order.

#### 7 Click Close to save.

The Gantt chart displays the schedule of tasks.

