Seminar 4

Home task is:

Create your an action plan for obtaining a master's degree (8 months) in Gantt chart in Excel create

How to make a Gantt chart in Excel

1. List your project schedule in an Excel table

1. Break down the entire project into chunks of work, or phases. These will be called project tasks and they form the basis of your Gantt chart.
2. In Excel 2007, 2010, 2013 or 2016, enter your data by listing the Start Date and Finish Date of each task, and also it's Duration (count of days required to complete that task). Also include a brief description of the task. Make sure to sort these tasks in order, by placing the earliest start date first and the latest start date last.
3. In this tutorial, I will convert the following table into an Excel Gantt chart and a PowerPoint Gantt chart:

Task(s)			
Start Date	**End Date**	**Description**	**Duration (days)**
7/25	8/1	Preparatory Phase	8
8/15	9/7	Phase 1 Work Effort	24
8/15	9/17	Phase 2 Work Effort	34
9/8	9/30	Phase 3 Work Effort	23
10/4	11/7	Testing Phase	35
11/11	12/11	Delivery Phase	31

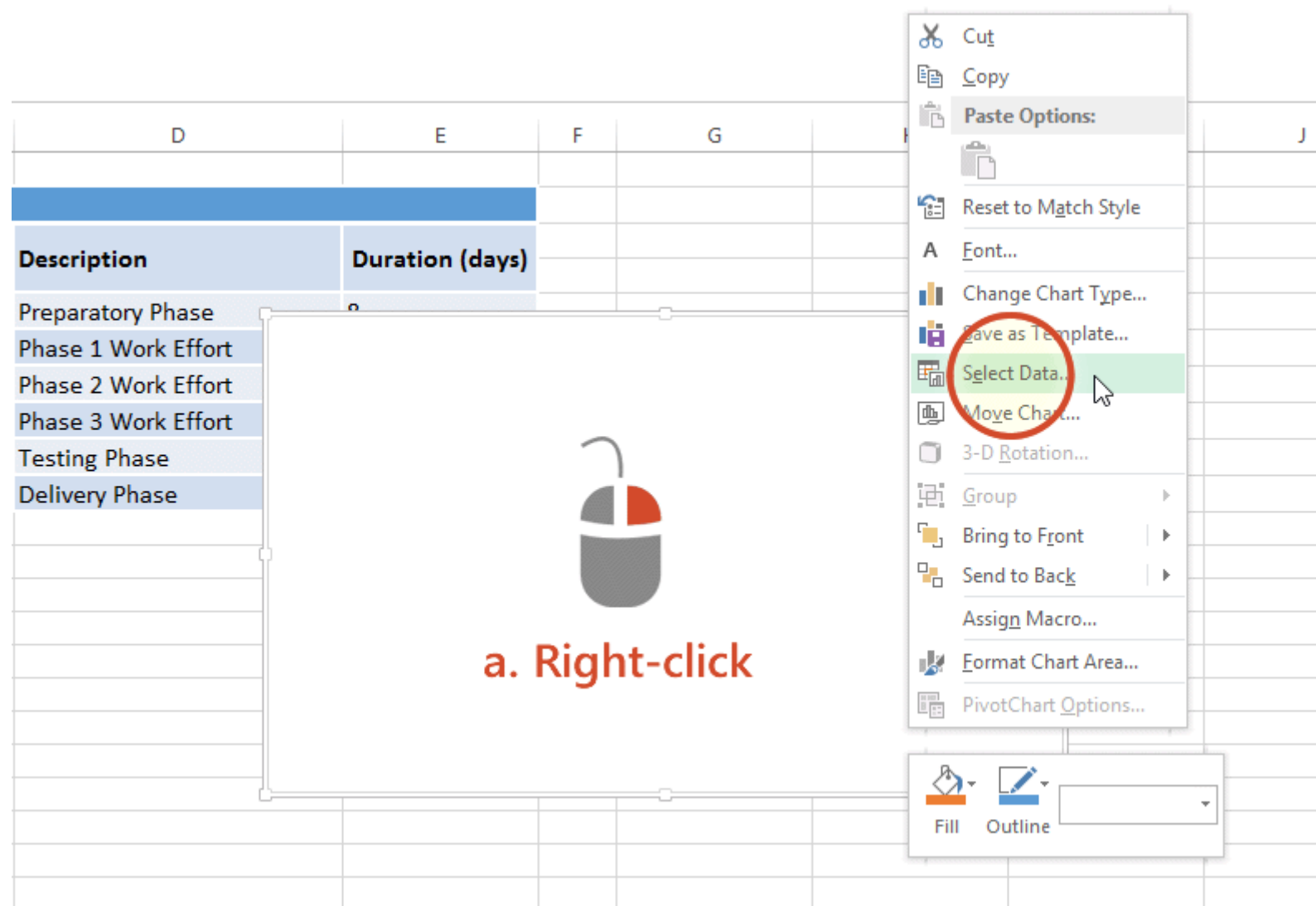## 2. Begin making your Excel Gantt by setting it up as a Stacked Bar chart

1. From the same worksheet that your Excel table is on, click in any blank cell.
2. Then from the Excel ribbon, select the **INSERT** tab.
3. In the Charts section of the ribbon, drop down the **Bar Chart** selection menu.
4. Select **Stacked Bar** which will insert a large blank white chart space onto your Excel worksheet (do not select 100% Stacked Bar).

Table data shown in the spreadsheet:

Task(s)			
Start Date	**End Date**	**Description**	**Duration (days)**
7/25	8/1	Preparatory Phase	
8/15	9/7	Phase 1 Work Effort	
8/15	9/17	Phase 2 Work Effort	
9/8	9/30	Phase 3 Work Effort	
10/4	11/7	Testing Phase	
11/11	12/11	Delivery Phase	

This empty chart gets created.

3. Add the start dates of your Tasks to the Gantt chart

1. Right-click the white chart space and click **Select Data** to bring up Excel's **Select Data Source** window.

D	E	F	G		J
Description	**Duration (days)**				
Preparatory Phase					
Phase 1 Work Effort					
Phase 2 Work Effort					
Phase 3 Work Effort					
Testing Phase					
Delivery Phase					

Right-click context menu:
- Cut
- Copy
- Paste Options:
- Reset to Match Style
- Font...
- Change Chart Type...
- Save as Template...
- Select Data...
- Move Chart...
- 3-D Rotation...
- Group
- Bring to Front
- Send to Back
- Assign Macro...
- Format Chart Area...
- PivotChart Options...

Fill   Outline

a. Right-click

2. On the left side of Excel's **Data Source** window you will see a table named **Legend Entries (Series)**. Click on the **Add** button to bring up Excel's Edit Series window and here you will begin adding Task data to your Gantt chart.

Select Data Source dialog:

Chart data range:

Switch Row/Column

Legend Entries (Series)
- Add
- Edit
- Remove

Horizontal (Category) Axis Labels
- Edit

Hidden and Empty Cells   OK   Cancel
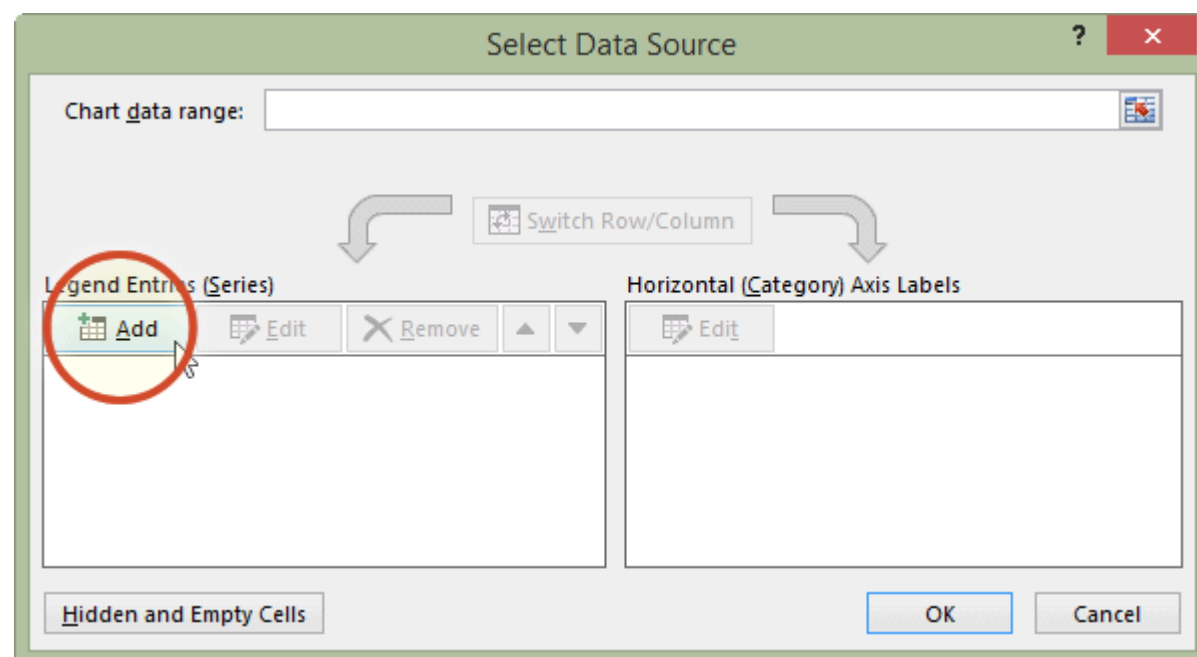
3. Now we're going to add your task data.

i. First we need to name the data (Series) we will be entering. Click and place your cursor in the empty field under the title **Series name**, then click on the column header that reads Start Date in your table.

ii. Staying in the **Edit Series** window move down to **Series value**. This is where you will enter your Task start dates. It is easy to do. To the right of the Series values field you will see an icon which looks like a spreadsheet with a red arrow on it.

`=Gantt!$B$3`   ➡ 📊

Click on it (the one by Series values) and Excel will open a smaller **Edit Series** window. Now simply click the first start date in your task table and drag your mouse down to the last start date. This highlights all of the start dates for your tasks and inputs them into your Gantt chart. Make sure you have not mistakenly highlighted the header or any extra cells.
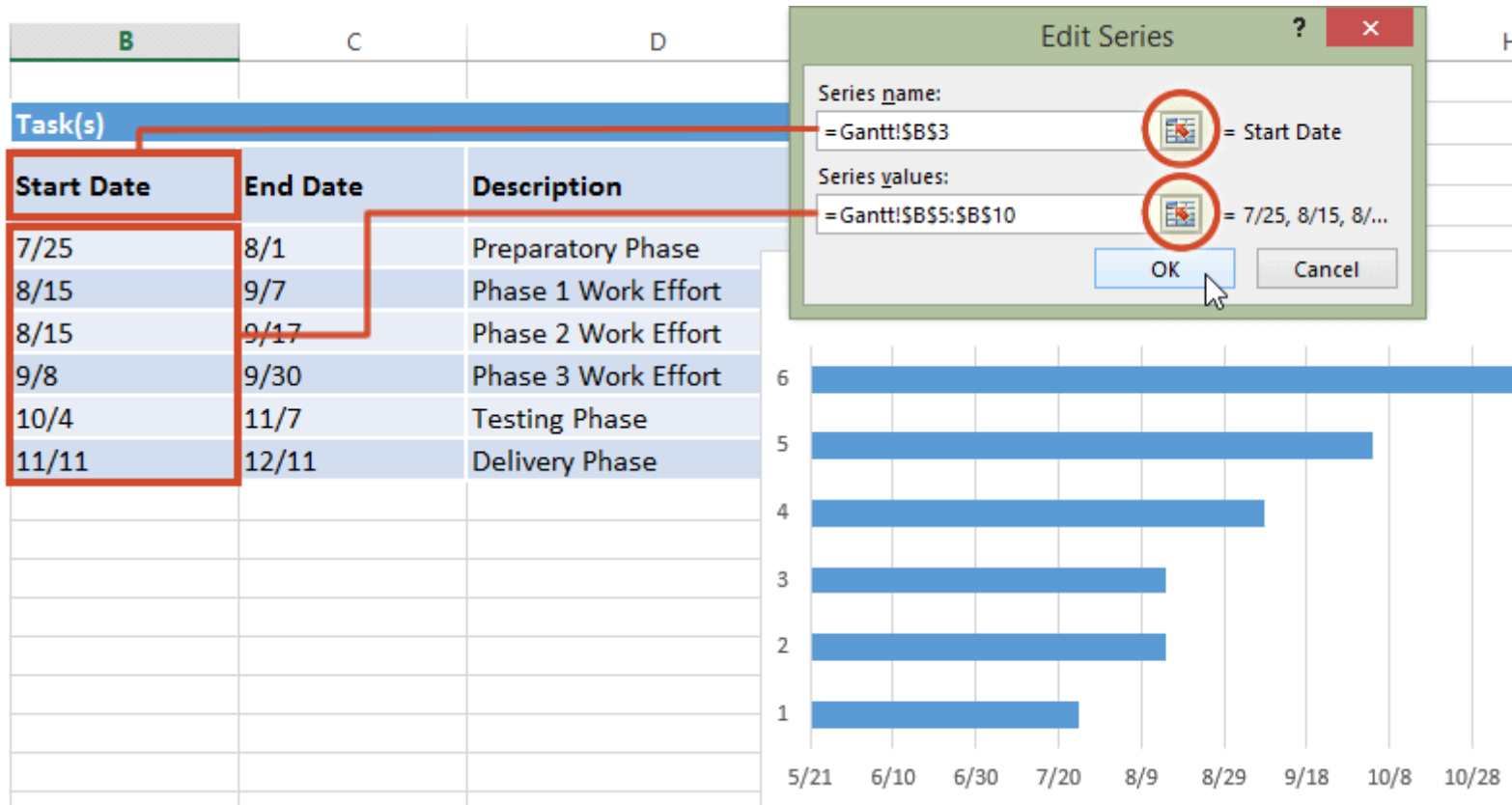
iii. When finished, click on the small spreadsheet icon

again `=Gantt!$B$5:$B$10`   ➡ 🖳 (the one with the red arrow) which will return you to the previous window called Edit Series. Click OK. Your Gantt should now look like this:
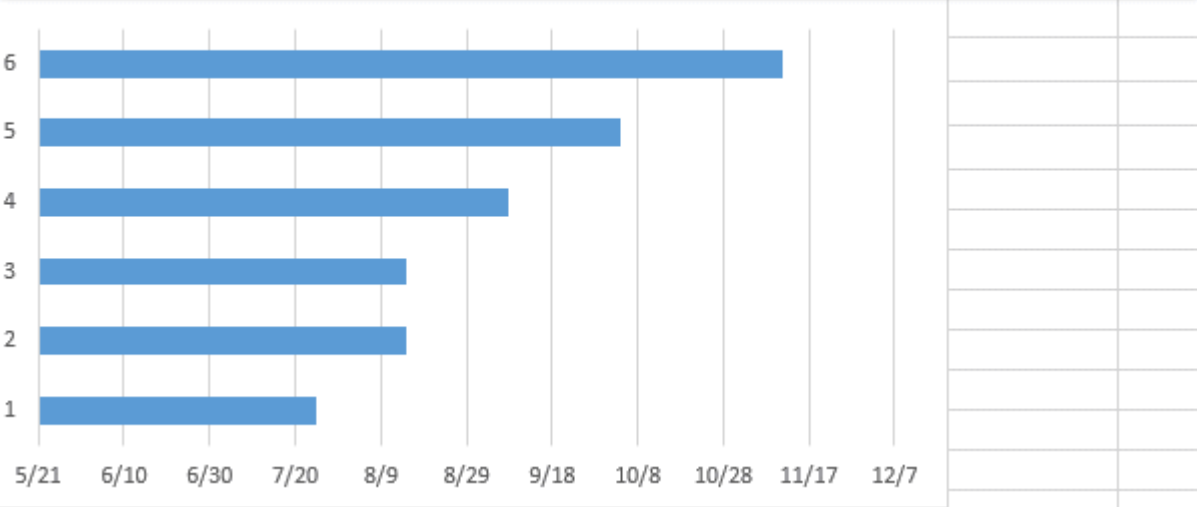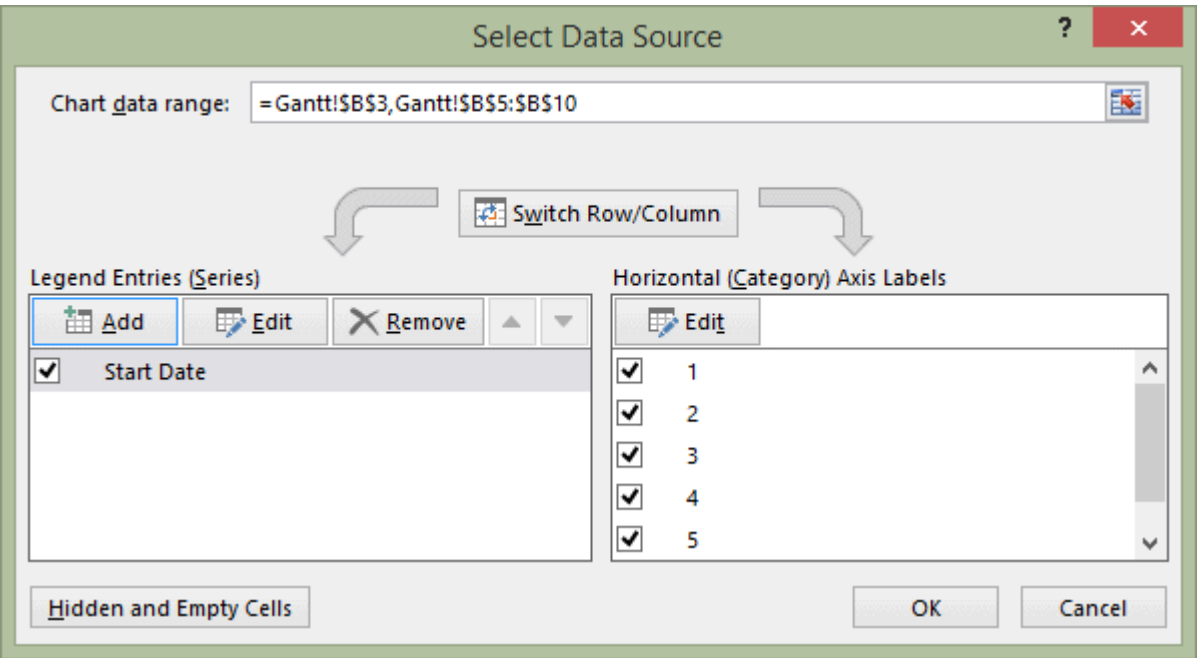
4. Add the durations of your Tasks to the Gantt chart

1. Staying in the **Select Data Source** window, click on the **Add** button again to bring up **Excel's Edit Series** window.
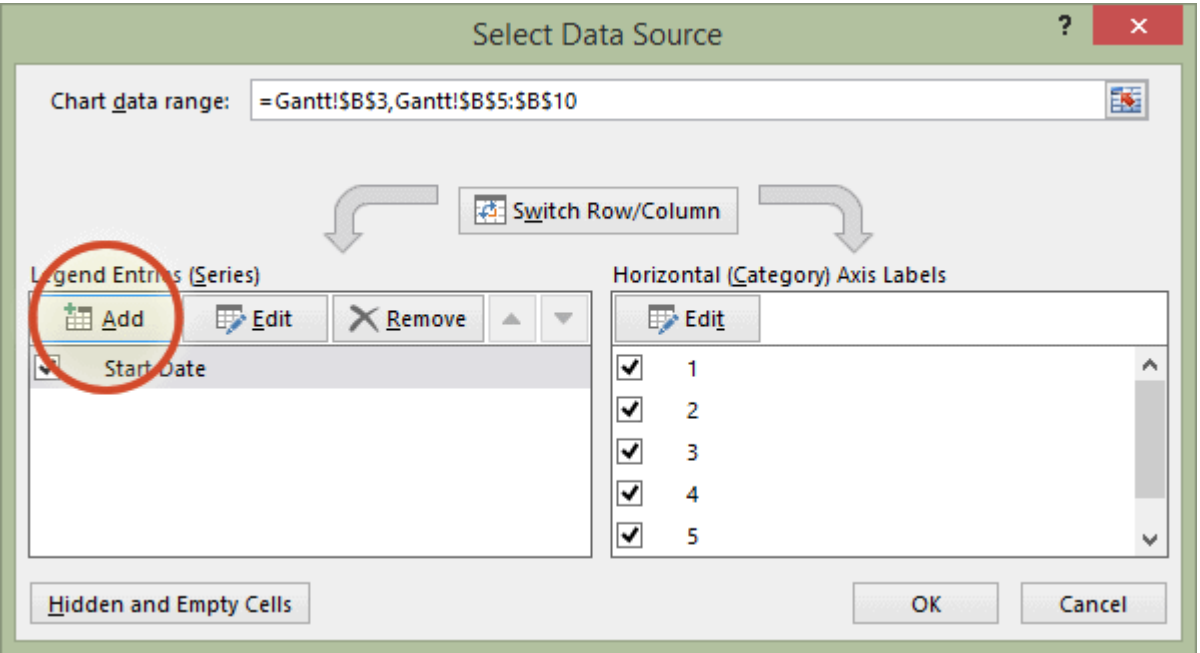
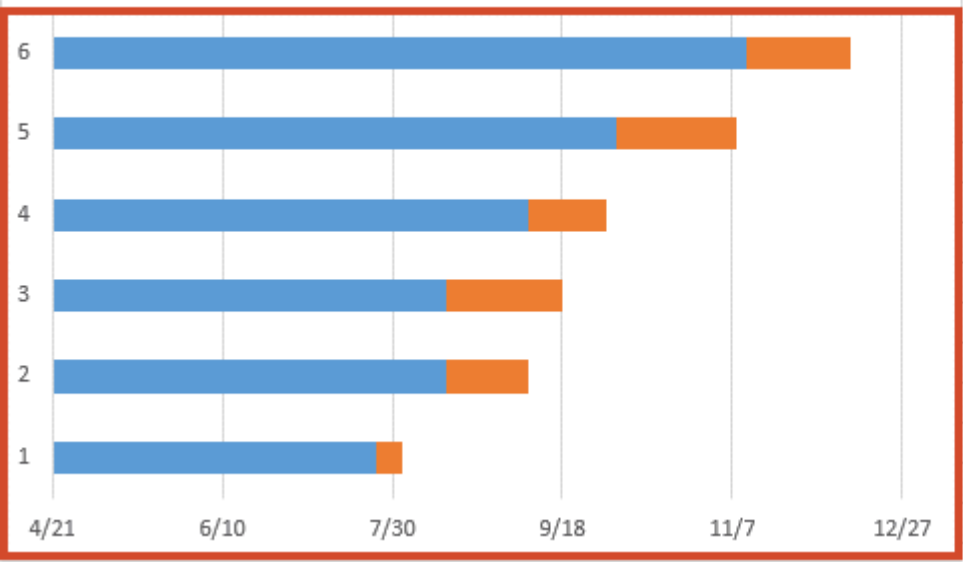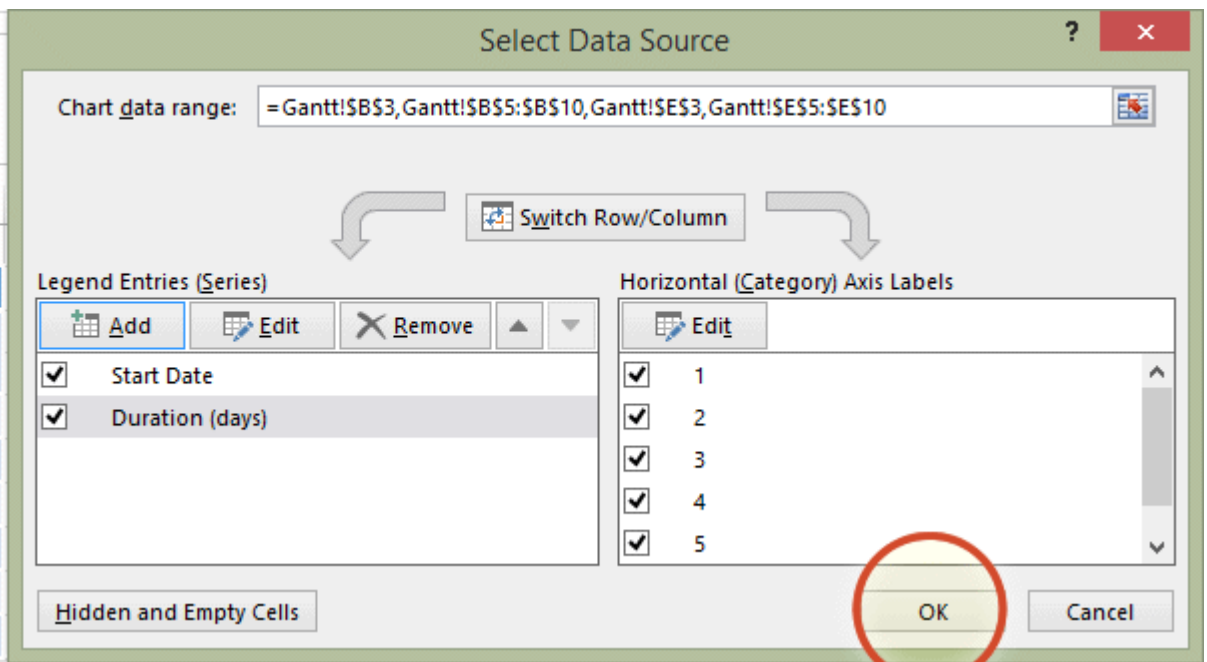2. Here we will add the duration data to your Gantt chart.

i. In the **Edit Series** window, click in the empty field under the title **Series Name**, then click in your Task table again, on the column header that reads Duration.
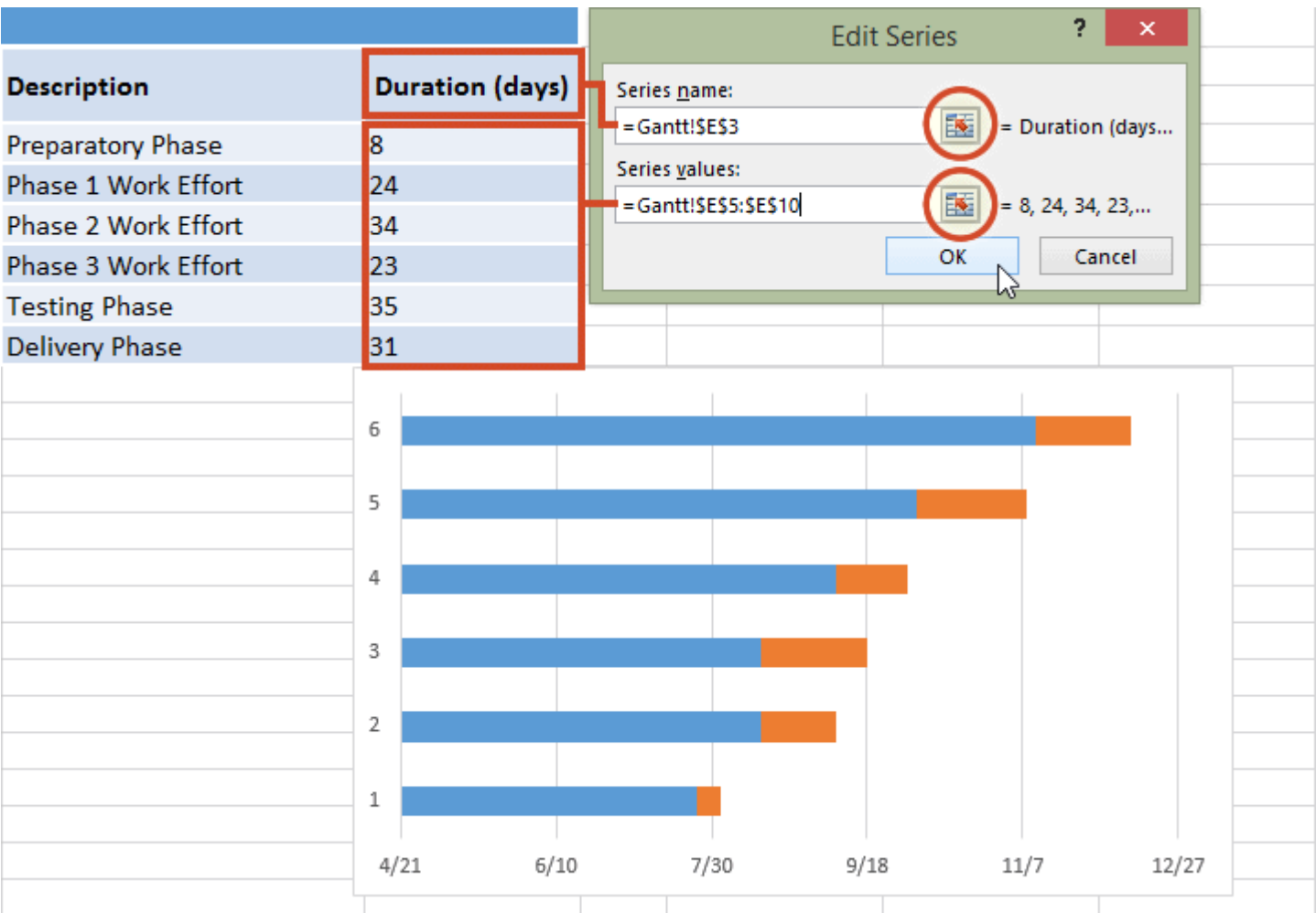
ii. Staying in the **Edit Series** window move down to **Series value** and click on spreadsheet icon with a red arrow on it =Gantt!$B$3 ➡ 📊 again.

iii. Select your Duration data by clicking on the first Duration in your project table and drag your mouse down to the last duration so all durations are now highlighted.

iv. To exit, once again click on the small spreadsheet icon with the red arrow to which will return you to the previous window. Select **OK** and you should now be back at the **Select Data Source** window. Click **OK** again to build your Gantt chart which should now look something like this:
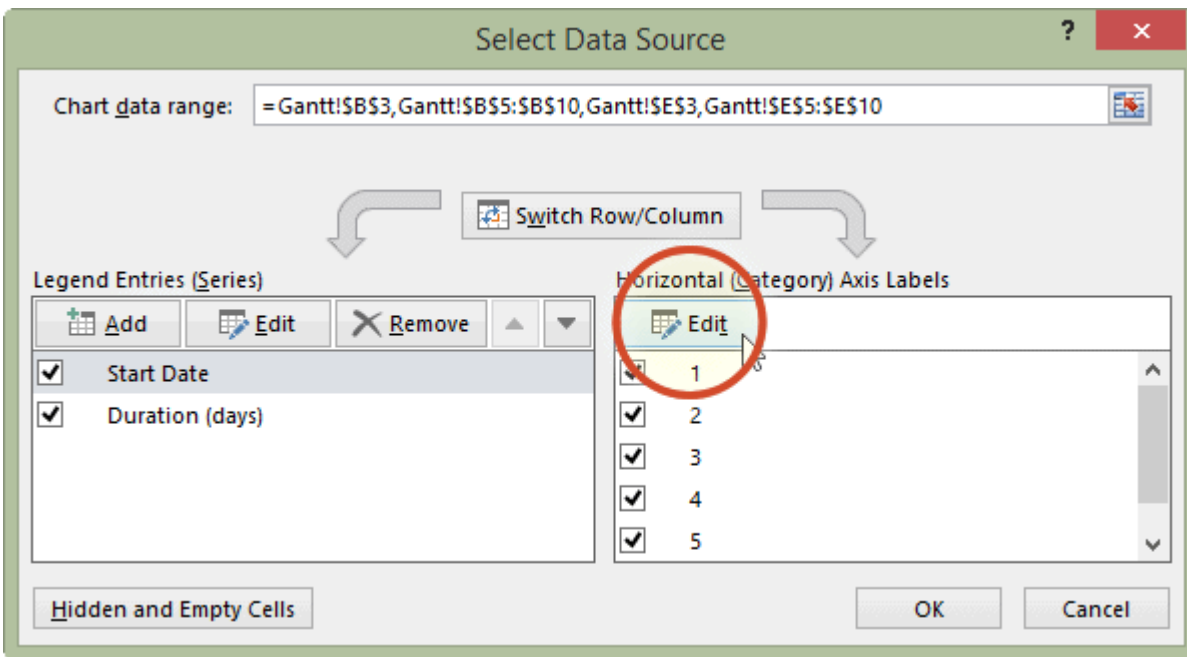
5. Add the descriptions of your Tasks to the Gantt chart

1. Right-click on one of the blue bars in the Gantt chart, then click on **Select Data** again to bring up the **Select Data Source** window.
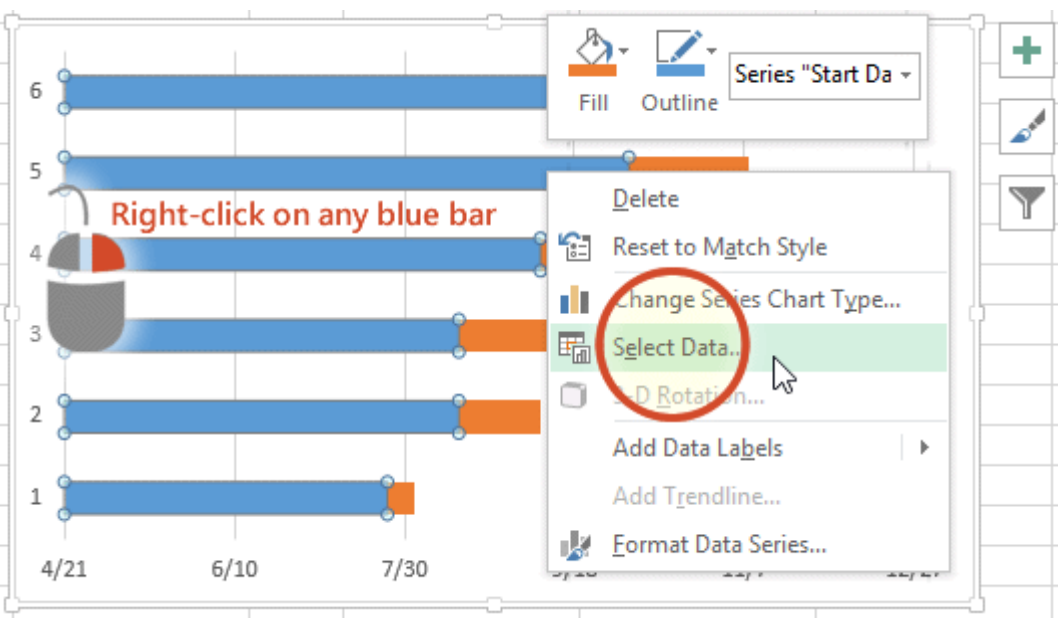
2. On the right side of Excel's **Data Source** window you will see a table named **Horizontal (Category) Axis Labels**. Select the **Edit** button to bring up a smaller **Axis Label** windows.


3. Again, click on the small spreadsheet icon. Click on the first name of your tasks (my first Task description is "Preparatory Phase"□) and select them all. Be careful not to include the name of the column itself. When you are done, exit this window by clicking on the small spreadsheet icon again.


4. Click on **OK** and then **OK** again to exit the **Select Data Source** window, and now your Gantt chart should have the correct Task descriptions next to their respective bars. Your chart should now look something like this:
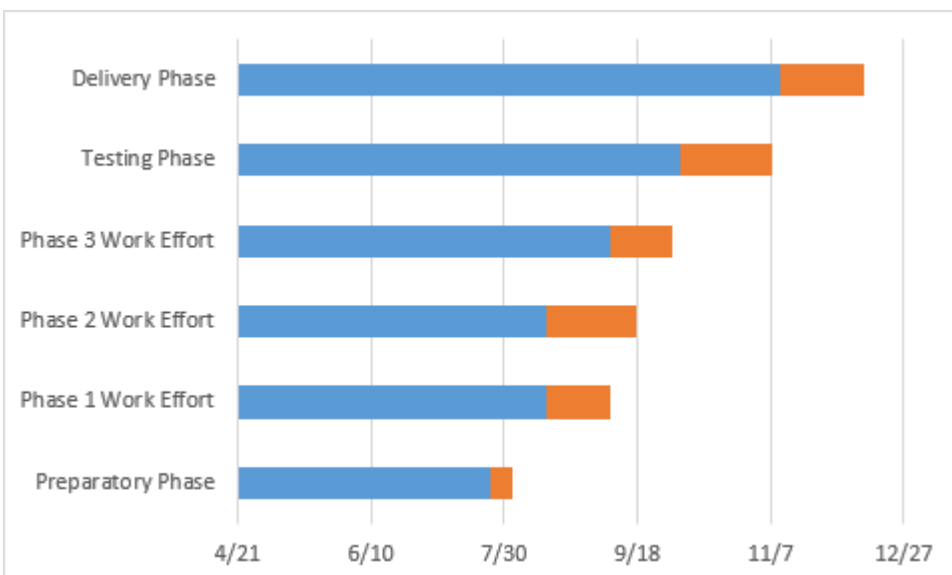
# 6. Format your chart so it looks like a Gantt chart

You have really built a Stacked bar chart. Now we need to format it so it looks like a Gantt chart. To do that, we must make the blue parts of each task bar transparent so only the orange parts will be visible. These will become the tasks of your Gantt chart.

1. To select all of the tasks bars at once, click on the blue part of any bar in your Gantt chart, then right-click and select **Format Data Series**, which will bring up the **Format Data Series** window in Excel.
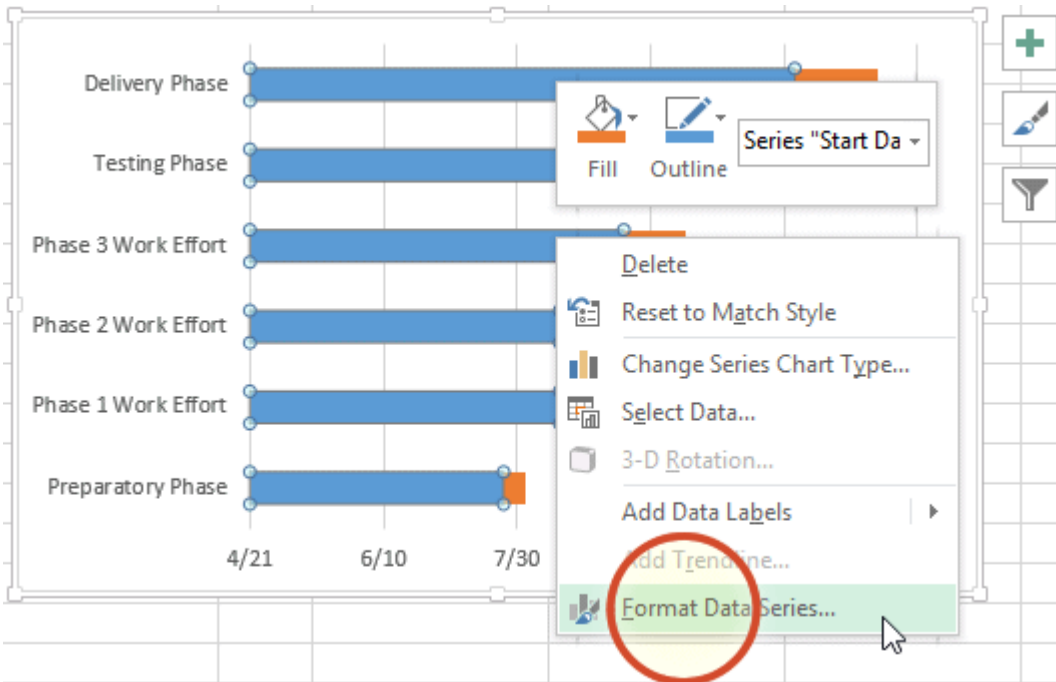
2. In the **Format Data Series** task pane, click on the **Fill & Line** icon (it looks like a paint can) to get the Fill & Line options. Under **Fill**, choose the **No Fill** radial button and under **Border** choose the **No Line** option. Don't close the Format Data Series task pane because we're going to use it in the next step.

   Your Gantt chart should now look like this:
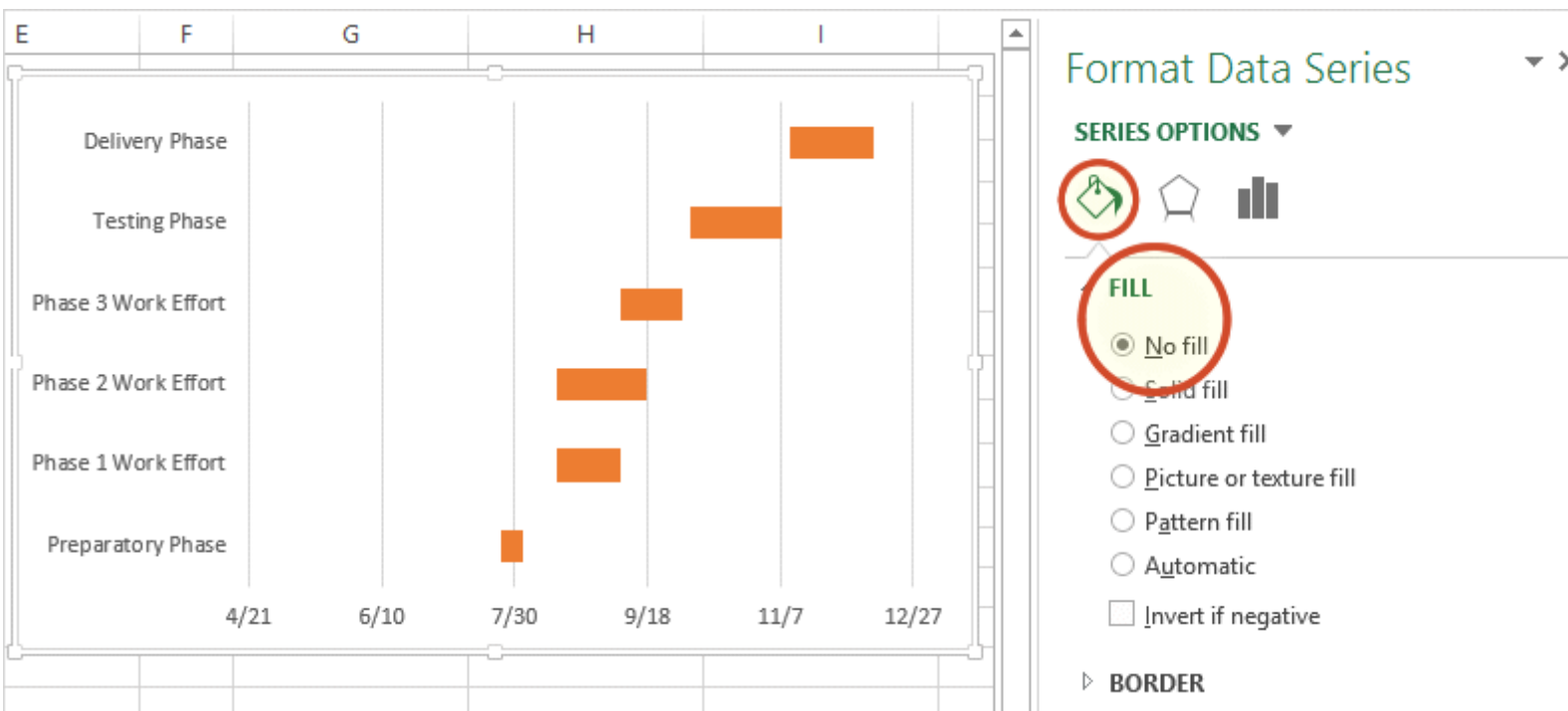
3. You probably also see that the tasks on your Gantt chart are listed in reverse order with the last task on top of the Gantt chart and the first Task listed at the bottom. This is easy to change in Excel.

    i. To do so click on the list of tasks along the vertical axis of your Gantt chart. This will select them all and it will also open the **Format Axis** task pane.

    ii. Click on the **Bar Chart** icon in the Format Axis Task Pane and expand out the **Axis Options** menu.

    iii. In the **Format Axis** task pane under the header **Axis Options** and the sub-header **Axis Position** put a check into the checkbox called **Categories in reverse order**.
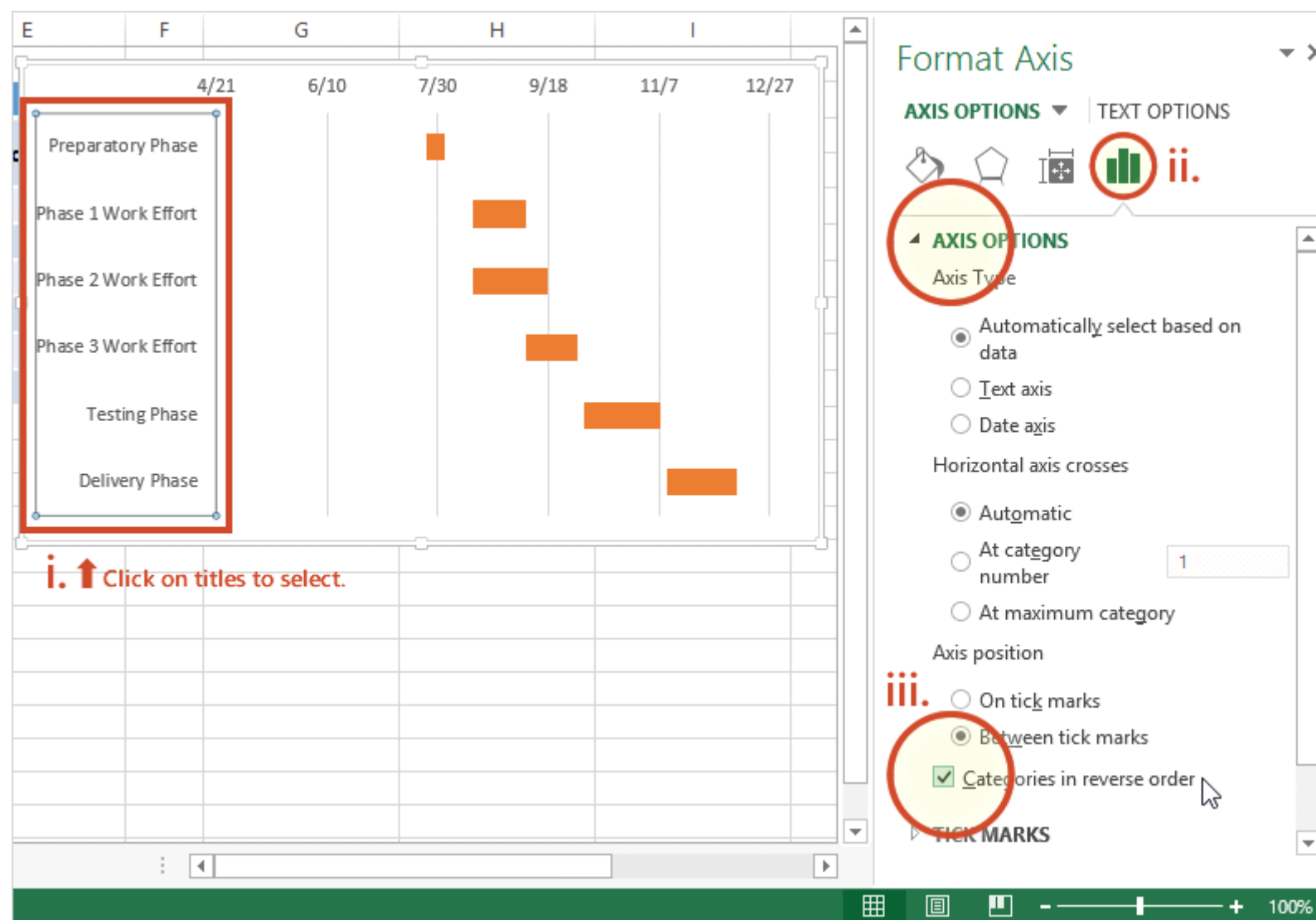
You will notice that Excel arranged your tasks into proper order, listing them from first to last on your Gantt chart. You will also notice that Excel moved the date markers from beneath to the top of the Gantt chart. Now it is really starting to look more like a Gantt chart should.

7. Finish your Gantt chart with these styling tips
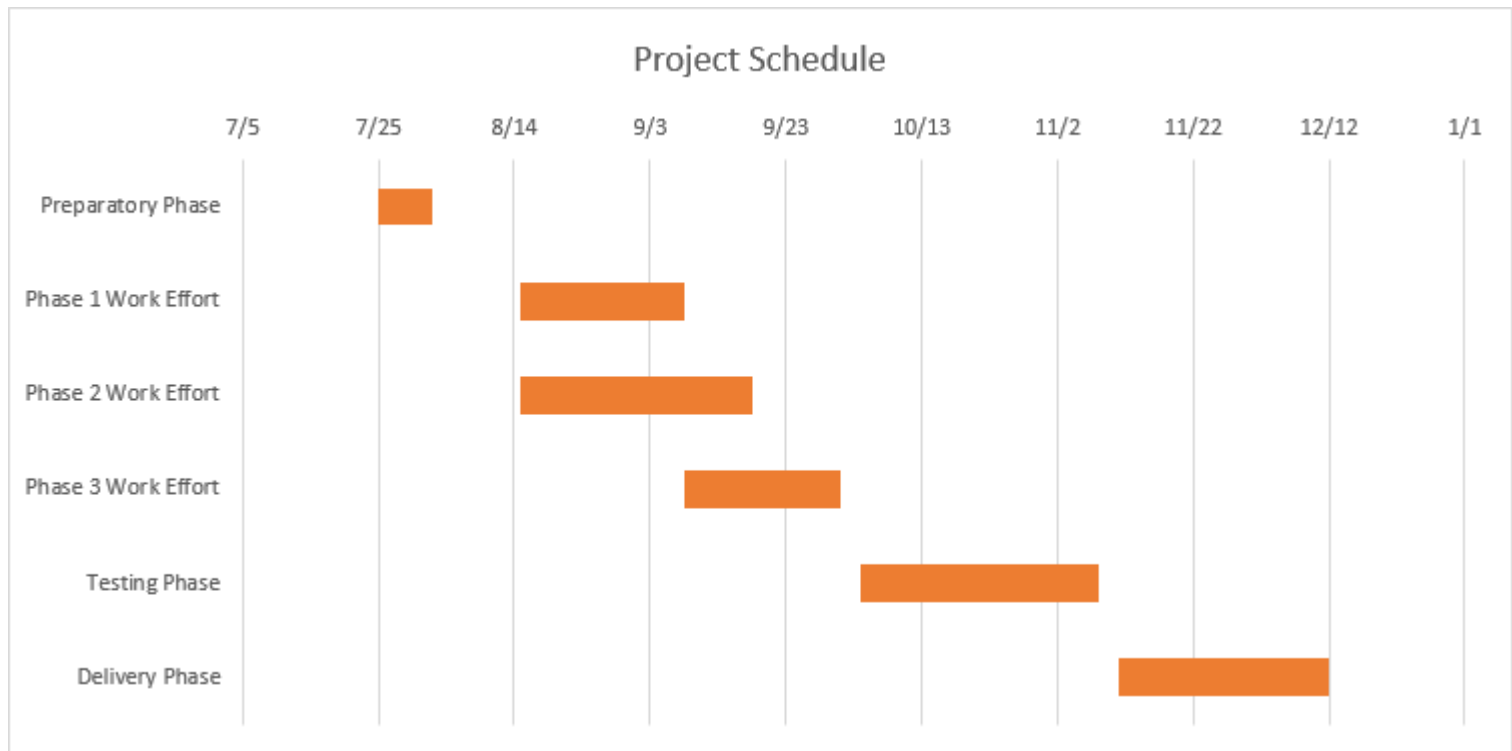
1. Optimize the Gantt chart

   Removing some of the blank white space where the blue bars used to be will bring your tasks a little closer to the vertical axis of your Gantt chart. To remove some of the blank white space in the chart, click on the dates above the task bars. One click should select all the dates, then right click and select Format Axis to bring up Excel's Axis Options window.

   In the Axis Options window, under the header called Bounds, note the current number for Minimum Bounds. It represents the left most boundary of your Gantt chart. Changing this number by making it larger will bring your tasks closer to the vertical axis of your Gantt chart. In my case I changed the original number which was 41750.0 to 41820.0. At any time you can hit the reset button to return the original settings. This gives you the opportunity to try a number of different settings until you find the one the makes your Gantt chart look best.

2. Adjust the density of the dates across the top of your Gantt chart

   In the same Axis Options window under the header Units, you can adjustment the spacing between each of the dates listed at the top of the horizontal Axis. If you increase the unit number your Gantt chart will enlarge the space between each date, which will also lessen the number of dates your Gantt chart shows. Doing the opposite, reduces the space between each date and therefore crowds more dates onto your Gantt chart. In my case I changed the original number from 20 to 30.

3. Thickening Task bars on your Gantt chart to reduce white space

   Right-click on the first Task bar and choose Format Data Series to open the Format Data Series control. Under the Series Options header you will find the Gap Width control. Sliding it up or down will increase or reduce the size of your Task bars on your Gantt chart. Play around until you find something that best works for you.

How to make a Gantt chart in PowerPoint

PowerPoint is graphical and a better choice for making Gantt charts that will be used in client and executive communications. Office Timeline is a PowerPoint add-in that makes and updates Gantt charts by importing or pasting from Excel.

You can copy-paste, import and synchronize your Excel tables in PowerPoint. In the steps below I will demonstrate how to turn the Excel table you created above in Step 1, into a PowerPoint Gantt chart using Office Timeline Basic.

# 1. Open PowerPoint and paste your table into the Office Timeline Basic wizard.

1. Inside PowerPoint, navigate to the **Office Timeline Basic** tab and click the **New** button.
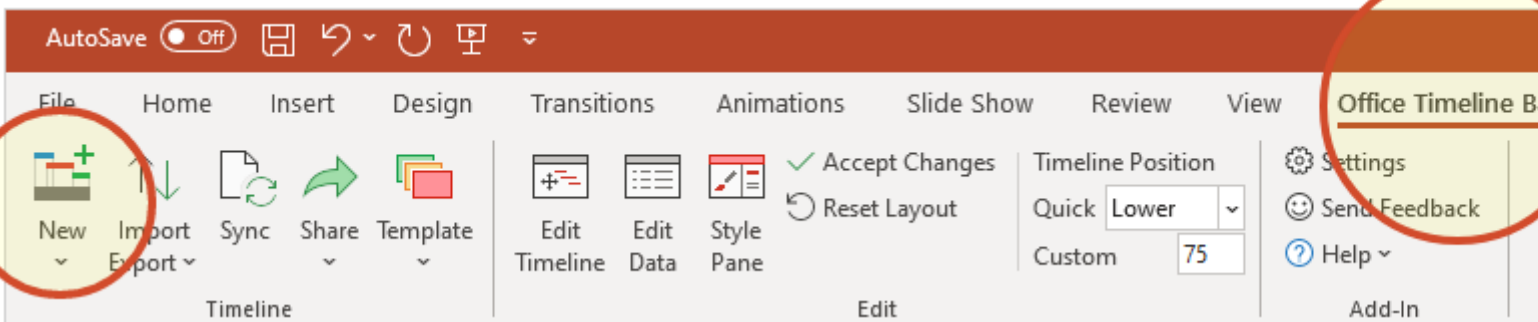
This will open a gallery that will allow you to choose a style or template for your Gantt chart.
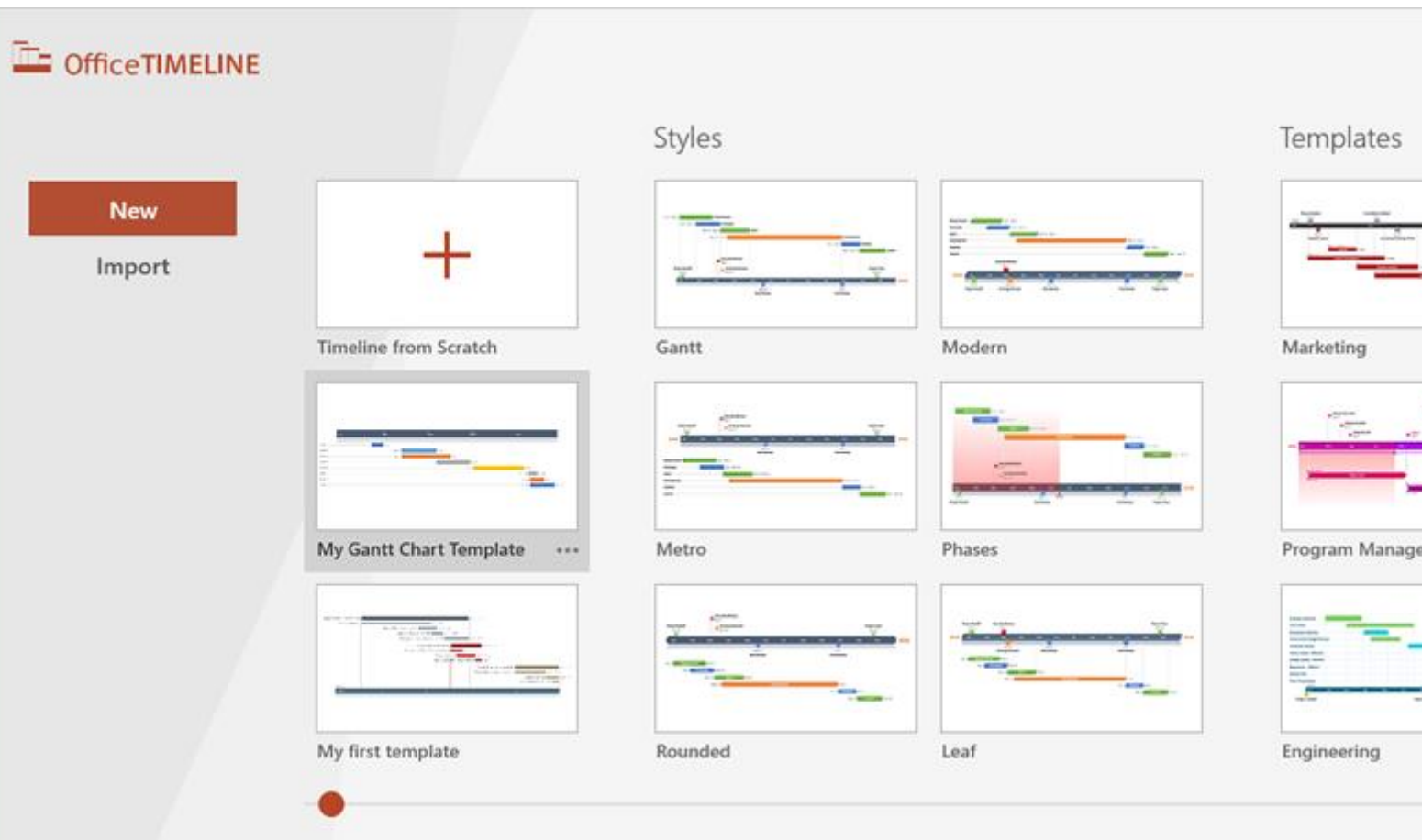
2. From the gallery, double-click any template or style to select it and then click **Use Template** in the preview window to open the Data Entry Wizard. In this demonstration, I will be using a custom template. **NOTE**: If you prefer to import and synch your Excel table, rather than copy-paste, select **Import**.
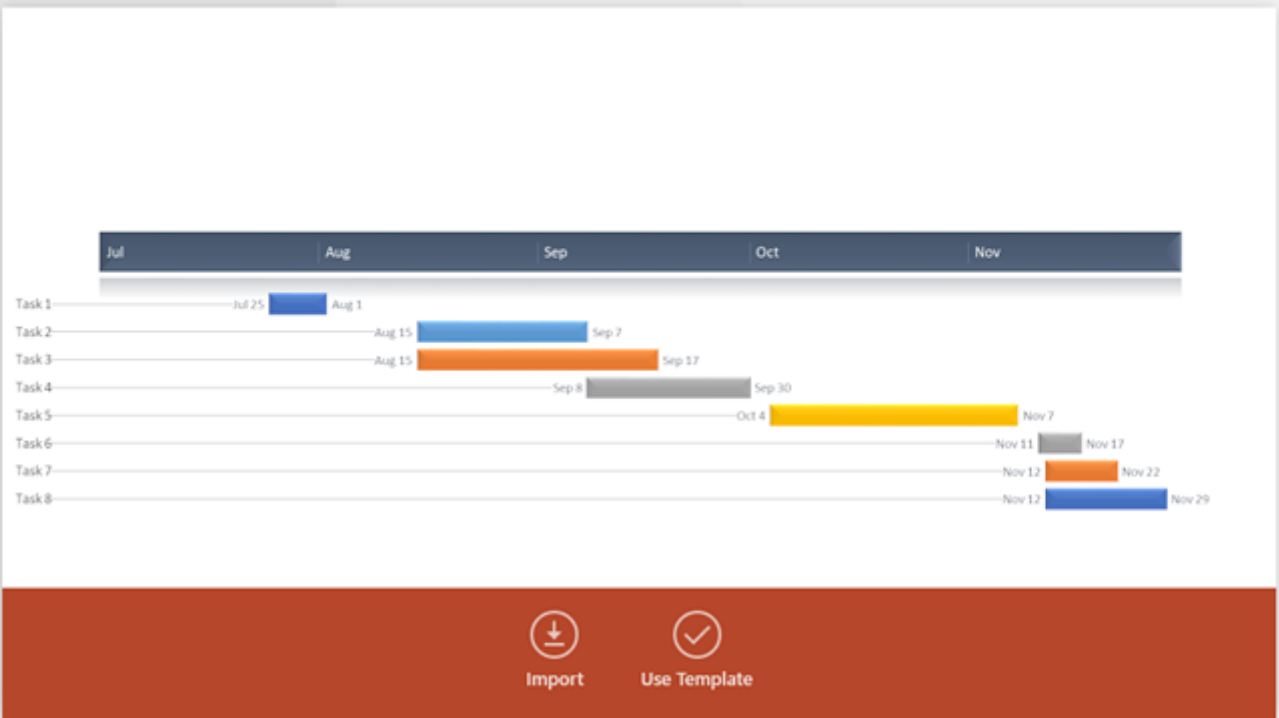
3. Copy your project's details, including Start Date, End Date and Description, from the Excel table you made earlier. You can copy them all at once, but be sure not to copy the title.

4. Now simply paste the data into PowerPoint using the Office Timeline Basic **Paste** button. Then, make any edits you wish (change colors or shapes, add or remove items, etc.) and click **Create**.
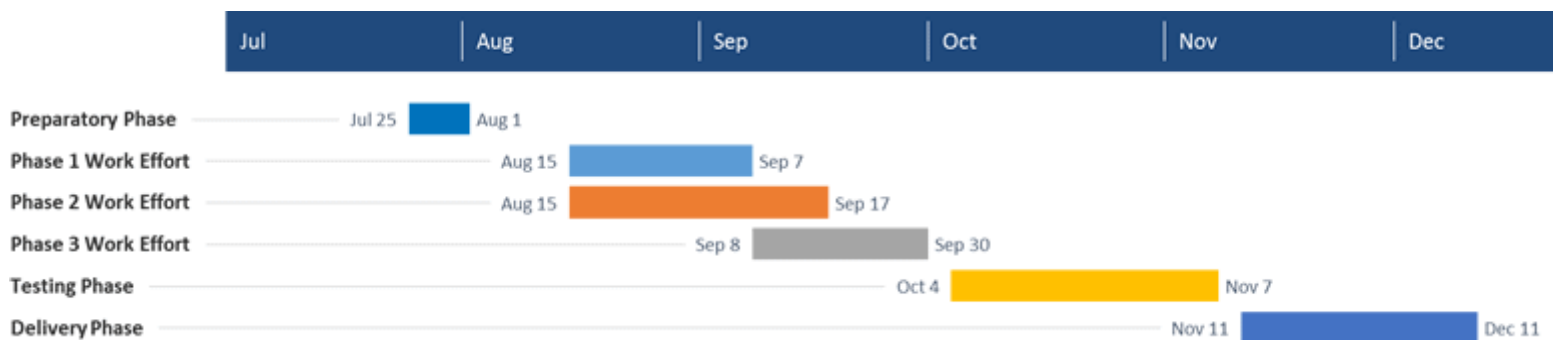
2. Your Excel table will be converted into a PowerPoint Gantt chart.

1. Depending on the style or template selected, you will have a Gantt chart that looks like this:

2. From here, you can easily customize the Gantt chart further, adding milestones, formatting fonts and colors, and adding various details like percent complete or notes. It is easy to do in Office Timeline. In my example, I used Office Timeline Basic to add milestones, move task titles and date texts, change shapes, and add percent complete.

How to make a PowerPoint Gantt chart
from Excel in under 60 seconds: