



**Microsoft Project 2016
Introduction
Course Notes**

Sample

Sample

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COURSE OBJECTIVES

By the end of this course you will be able to:

- Correctly create a new specified project, without reference to notes.
- Correctly define a project dates, referring to notes if necessary.
- Correctly change a calendar working times, referring to notes if necessary.
- Correctly close a project and save changes, without reference to notes.
- Correctly create, edit and re-order specified tasks, without reference to notes.
- Correctly organise tasks into phases, referring to notes if necessary.
- Accurately create recurring tasks, without reference to notes.
- Correctly add notes to tasks, without reference to notes.
- Accurately set milestones in a project, referring to notes if necessary.
- Correctly set dependencies between tasks, referring to notes if necessary.
- Correctly change the completed status of a task, referring to notes if necessary.
- Correctly create specified work and material resources, without reference to notes.
- Correctly assign resources to tasks, referring to notes if necessary.
- Briefly describe how to change views.
- Briefly describe what a resource pool is.
- Correctly create specified headers and footers, referring to notes if necessary.
- Correctly change the page setup, referring to notes if necessary.
- Briefly describe how to print the built-in reports.

MODULE 1 – INTRODUCTION

OBJECTIVES

At the end of this section you will be able to:

- Correctly create a new specified project, without reference to notes.
- Correctly define a project dates, referring to notes if necessary.
- Correctly change a calendar working times, referring to notes if necessary.
- Correctly close a project and save changes, without reference to notes.

WHAT IS PROJECT MANAGEMENT?

Project Planning consists of Planning, Organising and Managing the Activities and Means which lead to the achievement of a Defined Objective within a fixed period of time.

There is no single correct way to manage a project; however there are 4 clearly defined steps to managing a project.

1. Project Definition

The first stage is used to define

- What goals to accomplish, which major tasks (and how many) are needed to achieve these goals.
- What resources, i.e. people and equipment, are available to accomplish the goals?
- How much time is available to complete the project? What are the milestones & deadlines?

2. Project Plan

This is the heart of project management. It defines the scope, resources and schedule in one place thus enabling you to keep these factors in balance throughout the project. For an effective project plan:

- Identify all project tasks and who or what will do them.
- Get work and time estimates for tasks, preferably from the people responsible for those tasks.
- Determine task dependencies, e.g. find out if one task must be completed before the next can be started, or if several tasks must start at the same time etc.
- Establish task and project constraints, e.g. if a task must be started on a certain date.

3. Tracking the Project

When the project begins the Plan helps you to direct and fine-tune the project:

- Track project progress, comparing actual data to original estimates.
- Review resource, scope and schedule factors to balance priorities.
- Identify problems that could knock the project off schedule.
- Analyze resource requirements throughout the project.
- Make midstream changes that will help you reach the project goal sooner.

4. Closing the Project

Once all the project goals have been achieved and all criteria met, that signals the project's end, it's time to close the project. This now enables you to:

- Compare the original plan to the actual course of project event.
- Analyse problems and identify areas for future improvement.
- Archive the project file.

DEVELOPING YOUR PLAN

Once you have defined your project objectives, the next step is to plan how you will achieve them. There are four key things we need to consider when setting up the Project Plan. The way to define and achieve your goals is to build a list of **Tasks**. The logical grouping of these tasks which completes a major step is known as a **Milestone**.

Key Points

1. List Tasks/Activities & Milestones.
2. Determine the relationship between tasks.
3. Estimate the duration of each task.
4. Construct the network.
5. Optimise the network.

Tasks

Tasks (or activities) are the basic building blocks of the project. In order to carry out a project you need to carry out a sequence of tasks. To manage the project effectively you need to define your tasks so that they are the right size to be effectively managed and completed

Deliverables

Sometimes referred to as *Products* and are the things that the project will produce along the way. Typically reports, requirements documents, and acceptance certificates.

Milestones

A milestone represents an event or condition that marks the completion of a group of related tasks or a phase of the project. Milestones are intermediate objectives which indicate the state of progress of the project. A project should have a milestone at the start date and another to mark the completion date. In Project 2016, milestones usually have a duration value of zero because it marks a specific point in the schedule when a phase of the project is completed.

Resources

To accomplish a task you need resources. Resources can include people, equipment or special facilities necessary to perform the task. The number of resources you use affects both the duration and the cost of your project.

WHAT IS PROJECT 2016?

Microsoft Project 2016 provides all the tools you need for effective planning, tracking, problem solving, sharing, and completing a project in keeping with conventional management principles and practices.

Office Project Standard 2016 is designed for managers who do not need to collaborate with others to build their projects or select resources. Office Project Professional 2016 is designed for project and resource managers who work with others across an enterprise to share schedules and resources by connecting to Office Project Server 2016 or SharePoint Foundation 2016. This course does not cover Office Project Server 2016 or SharePoint Foundation 2016 features.

THE PROJECT ENVIRONMENT

Using the Ribbon

The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as working with tasks or resources. To reduce clutter, some tabs are shown only when needed.

There is no way to delete or replace the Ribbon with the toolbars and menus from the earlier versions of Microsoft Office. However, you can customise the Ribbon and also minimize it to make more space available on your screen.

To minimize the Ribbon

1. Right-click anywhere on the Ribbon and select **Collapse the Ribbon** or alternatively, double-click the name of any tab
2. To use the Ribbon while it is minimized, click on the tab you want to use, and then click the option or command you want to use.

To restore the Ribbon

1. Right-click anywhere on the Ribbon and click on **Collapse the Ribbon** (This will clear the tick next to this option) or alternatively, double-click any tab again to restore the Ribbon.

Customising the Quick Access Toolbar

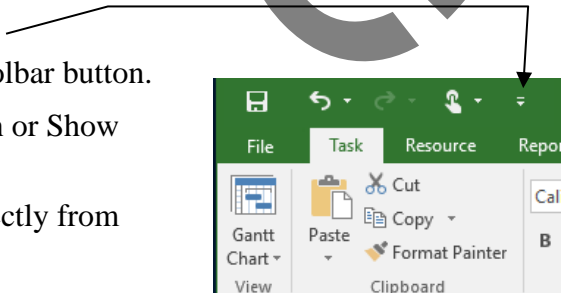
The Quick Access Toolbar is a customizable toolbar that contains a set of commands that are independent of the tab that is currently displayed. You can move the Quick Access Toolbar from one of the two possible locations, and you can add buttons that represent commands to the Quick Access Toolbar.

The Quick Access Toolbar can be located in one of two places - either in the upper-left corner next to the **File tab**, or below the Ribbon.

To move the Quick Access Toolbar

1. Click on the **Customize Quick Access Toolbar** button.
2. In the list, click on Show Below the Ribbon or Show Above the Ribbon as required.

You can add a command to the Quick Access Toolbar directly from commands that are displayed on the Ribbon.



To quickly add a command to the Quick Access Toolbar

1. On the Ribbon, click on the appropriate tab or group to display the command that you want to add to the Quick Access Toolbar.
2. Right-click on the required command, and select **Add to Quick Access Toolbar** on the shortcut menu.

Notes:

You cannot increase the size of the buttons. The only way to increase the size of the buttons is to lower the screen resolution you use.

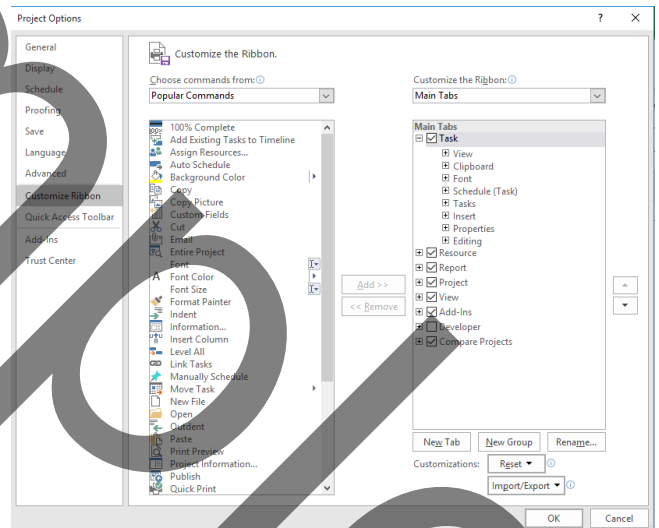
You cannot display the Quick Access Toolbar on multiple lines.

Customising the Ribbon

The Ribbon is customizable also. You can create new tabs and also new groups both on the new tabs and in existing tabs. You can also add new buttons to new groups. You cannot delete any of the built-in tabs, groups or buttons. Buttons can only be added to custom groups, not to existing built-in groups.

To add a new tab or new group to the Ribbon

1. Right-click anywhere on the Ribbon
2. Click on the **Customize the Ribbon...** option. The *Customize Ribbon* dialog is displayed.
3. The right-hand pane initially shows the Main tabs and the currently selected Ribbon tab will be expanded in the pane to show the various groups. Click on any of the + signs to expand the display and give more detail. To view the other available tabs that can be customised click on the drop-down selector above the right-hand pane and choose *All Tabs* or *Tool Tabs* as required.
4. Do one or more of the following:
 - To create a new tab, click on the **New Tab** button below the right-hand pane. The new tab will be inserted below the currently selected tab, together with a default empty new group.
 - To create a new group, click on the **New Group** button below the right-hand pane. The new group will inserted at the end of the existing groups in the currently selected tab.

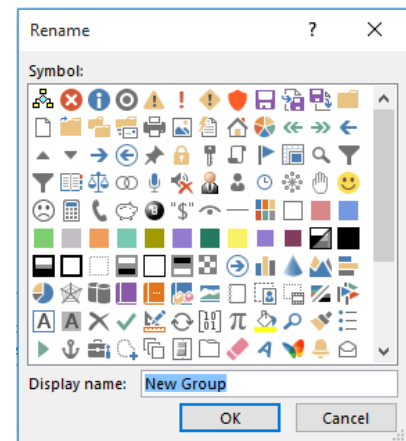


Note: To reposition the tab/group click on the tab/group then use the up and down arrows to the right of the right-hand pane to reposition, while the tab/group name is selected.

To rename a new tab or group

1. Right-click anywhere on the Ribbon

2. Click on the **Customize the Ribbon...** option. The *Customize Ribbon* dialog is displayed.
3. Select the tab or group entry in the right-hand pane.
4. The *Rename* dialog is displayed as shown here. Type a new name in the *Display name* box at the bottom.
5. If you want the button to have an associated icon, choose one by clicking on one from the displayed *Symbol* collection.
6. Finally, click on **OK**.



To add a new button to a group

1. Right-click anywhere on the Ribbon
2. Click on the **Customize the Ribbon...** option. The *Customize Ribbon* dialog is displayed.
3. In the right-hand pane, right-click on the tab and group that will hold the button.
4. In the left-hand pane select the button that you wish to add.
5. Click on the **Add>>** button.

Note: To reposition the button use the up and down arrows at the side of the right-hand pane while the added button is selected in the right-hand pane.

To delete a previously created tab, group or button.

1. Right-click anywhere on the Ribbon
2. Click on the **Customize the Ribbon...** option. The *Customize Ribbon* dialog is displayed.
3. In the right-hand pane, click on the tab, group or button to delete.
4. Click on the **<<Remove** button.

To reset ribbon customisations

1. Right-click anywhere on the Ribbon
2. Click on the **Customize the Ribbon...** option. The *Customize Ribbon* dialog is displayed.
3. Click on the reset button below the right-hand pane, and choose **Reset All Customisations** or **Reset Only Selected Ribbon Tab** as required. *Note: Reset Only Selected Ribbon Tab is only available when you are looking at a built-in tab that has been customised by having new buttons or groups inserted.*

EXERCISE 1

1. Create a new Blank Project.
2. Click on the **File** tab, and look at the project's information. Use Advanced Properties to set the title of *New Product Brochure* and your name as the *Author*. Close the Advanced properties down when the changes have been made and return to viewing the Project tab of the Ribbon.
3. Set the project Start date to next Monday.
4. You are now going to create a new Project Calendar for use in the project. Using the **Change Working Time** dialog, create a new calendar (a new base calendar) and name the new Calendar *Working Week*. It should have the following attributes.
 - a. For Monday through to Thursday the working day should start at 08:30 until 12:30 then 13:00 until 17:00.
 - b. For Friday the working day should start at 08:30 until 12:30 then 13:00 until 16:00.
 - c. Mark the 25th of December, as a recurring public holiday (non-working time) for 10 recurrences.
 - d. Select the **Options** button and ensure the *Default Start Time* is set to 08:30.
5. Now view the *Project Information* dialog. Change the calendar for the project to the *Working Week* calendar.
6. Now close this project and save it as **New Product Brochure**.

EXERCISE 2

1. Open the **New Product Brochure** file.
2. Create a new summary task and rename it as *Write Brochure*. Leave the Duration, Start and Finish dates as they are.
3. In the second row of the Gantt table underneath *Write Brochure*, rename the New Task as *Research new product*
4. Create the following new tasks each on separate rows:
 - Create an outline*
 - Write a rough draft*
 - Final Draft Approved*
 - Create mailing list*
5. Create a summary task above row 1 named *Marketing New Product*. Leave the Duration, Start and Finish dates as they are.
6. Add another task at the bottom with the name *Build list*.
7. Indent *Build list* so it becomes a sub-task of *Create mailing list*
8. Set the duration of *Build list* to 4 days.
9. Move the *Create mailing list* task (including sub-task) so it is positioned above *Write brochure*.
10. Set the duration of the *Research New Product* task to 2 days. Because you manually changed the duration of the task, the question mark which indicated an estimated duration disappeared. Change the duration back to an estimated 2 days.
11. Creating some new tasks starting in row 9. Use the following:
 - Get quotes from printers*
 - Prepare through desktop publishing*
 - Get printed*
12. Set the duration of *Get quotes from printers* to 2 days.
13. Insert a summary task above row 9. Give it the name of *Print Brochure*
14. Using the Outdent button once, make the *Print Brochure* summary task the same level as *Write brochure*. Notice when *Print Brochure* becomes a summary task the three tasks below it become its subtasks.
15. We will now enter the remaining tasks in our project from row 13 down. They are:
 - Distribute Brochure*
 - Do mass mail out*
16. Using the Outdent button once, make row 13 a *Summary Task* (i.e. out-dented once at the same level as the summaries above it).
17. Now save the changes to the file and close it down but keep project running.