

**Module Title** : Microsoft Project 2016 Step by Step

**Duration** : 3 days

## Overview

Experience learning made quickly teach yourself how to manage the complete project life cycle with Project 2016. With Step by Step, you set the pace and practicing the skills you need, just when you need them!

Discover how to:

- Work with Project 2016 on your PC or touch-enabled device
- Build and fine-tune your project plan
- Schedule tasks and milestones, and assign resources
- Track progress and costs, and manage variances
- Troubleshoot delays and budget overruns
- Customize Gantt chart views, tables, and calendars
- Learn project-management best practices

## Contents

### Part 1: Get started with Microsoft Project

1. Project, project management, and you
  - Meet the Project program
  - Meet the Project family
  - See the new features in Project 2016
    - What was new in Project 2013
    - What was new in Project 2010
  - Take a project manager's perspective
    - Let's get started!
2. Take a guided tour
  - Explore the Project user interface
  - Manage files and set options in the Backstage view
    - Sidebar: Templates: Avoid reinventing the wheel
  - Work with schedule details in views
  - Use reports to check a plan's status
  - Skills review

- Practice tasks

## Part 2: Simple scheduling basics

### 3. Start a new plan

- Create a new plan and set its start date
- Set nonworking days in the project calendar
- Enter the plan title and other properties
  - Sidebar: Project management focus: Project is part of a larger picture
- Skills review
- Practice tasks

### 4. Build a task list

- Create tasks
  - Sidebar: Project management focus: Defining the right tasks for the deliverable
- Enter task durations and dates
  - Sidebar: Project management focus: How do you come up with accurate task durations?
- Enter milestone tasks
- Create summary tasks to outline the plan
  - Sidebar: Project management focus: Top-down and bottom-up planning
- Link tasks to create dependencies
- Switch task scheduling from manual to automatic
- Check a plan's duration and finish date
- Document task information
- Skills review
- Practice tasks

### 5. Set up resources

- Set up work resources
  - Sidebar: Equipment resource considerations
- Enter the maximum capacity for work resources
- Enter work resource pay rates
  - Sidebar: Project management focus: Getting resource cost information
- Adjust working time in a resource calendar
- Set up cost resources
- Document resources by using notes
- Skills review
- Practice tasks

### 6. Assign resources to tasks

- Assign work resources to tasks

- Control work when adding or removing resource assignments
    - Sidebar: Project management focus: When should effort-driven scheduling apply?
  - Assign cost resources to tasks
  - Check the plan after assigning resources
  - Skills review
  - Practice tasks
7. Format and share your plan
- Customize a Gantt chart view
    - Sidebar: Drawing on a Gantt chart
  - Add tasks to a Timeline view
    - Sidebar: Panning and zooming a Gantt chart view from a Timeline view
  - Customize reports
  - Copy views and reports
  - Print views and reports
  - Skills review
  - Practice tasks
8. Track progress: Basic techniques
- Understand progress tracking
  - Save a baseline of your plan
  - Track a plan as scheduled
  - Enter a task's completion percentage
  - Enter actual values for tasks
    - Sidebar: Project management focus: Is the project on track?
  - Skills review
  - Practice tasks

### Part 3: Advanced scheduling techniques

9. Fine-tune task scheduling
- See task relationships by using Task Path
  - Adjust task link relationships
  - Control task scheduling by using constraints
  - Interrupt work on a task
  - Adjust working time for individual tasks
  - Control task scheduling by using task types
    - Sidebar: Assignment units, Peak, and the assignment calculation
    - Sidebar: Task types and effort-driven scheduling
  - See task schedule details by using the Task Inspector

- Skills review
- Practice tasks

#### 10. Fine-tune task details

- Enter deadline dates
- Enter fixed costs
- Create a recurring task
- View the plan's critical path
- Schedule summary tasks manually
- Skills review
- Practice tasks
- Fine-tune resource and assignment details

#### 11. Change resource availability over multiple date ranges

- Work with multiple resource pay rates
- Change resource pay rates over different date ranges
- Delay the start of assignments
- Apply contours to assignments
- Create and assign material resources
- View resource capacity
- Adjust assignments in the Team Planner view (Project Professional only)
- Skills review
- Practice tasks

#### 12. Fine-tune the Project plan

- Examine resource allocations over time
  - Sidebar: Project management focus: Evaluate resource allocation
- Resolve resource overallocations manually
- Level overallocated resources
- Check the plan's cost and finish date
  - Sidebar: Project management focus: Finish date and critical tasks
- Inactivate tasks (Project Professional only)
- Skills review
- Practice tasks

#### 13. Organize plan details

- Sort plan details
- Group plan details
- Filter plan details
- Create new tables
  - Sidebar: Create custom fields quickly
- Create new views

- Skills review
- Practice tasks

#### 14. Track progress: Detailed techniques

- Update a baseline
  - Sidebar: Save interim plans
- Track actual and remaining work for tasks and assignments
  - Sidebar: Enter actual costs manually
- Track timephased actual work for tasks and assignments
  - Sidebar: Project management focus: Collect actuals from resources
- Reschedule incomplete work
- Skills review
- Practice tasks

#### 15. View and report project status

- Examine a plan's variance
  - Sidebar: Project management focus: Get the word out
- Identify tasks that have slipped
  - Sidebar: Project management focus: Is variance ever a good thing?
- Examine task costs
- Examine resource costs
- Skills review
- Practice tasks

### Part 4: In-depth and special subjects

#### 16. Format and print views: In-depth techniques

- Format a Gantt chart view
- Format a Timeline view
- Format a Network Diagram view
- Format a Calendar view
- Print and export views
- Skills review
- Practice tasks

#### 17. Format reports: In-depth techniques

- Create a custom report
  - Sidebar: How reports compare to views
- Customize charts in a report
- Customize tables in a report
- Skills review

- Practice tasks

#### 18. Customize Project

- Share custom elements between plans
- Record and run macros
- Edit macros
- Customize the ribbon and Quick Access Toolbar
- Skills review
- Practice tasks

#### 19. Share information with other programs

- Copy Project data to and from other programs
- Open files in other formats in Project
- Save to other file formats from Project
  - Sidebar: Share files with previous versions of Project
- Generate reports with Excel and Visio
- Skills review
- Practice tasks

#### 20. Consolidate projects and resources

- Share a resource pool across multiple plans
  - Sidebar: Create a dedicated resource pool
- Consolidate plans
  - Sidebar: Keep consolidated plans simple
- Create dependencies between plans
- Skills review
- Practice tasks
- Appendix A: A short course in project management
- Appendix B: Develop your project-management skills
- Appendix C: Collaborate: Project, SharePoint, and PWA
- Appendix D: Use this book in a classroom